



Tracking Genie Sales Department



# Customer Relationship Management



# Customer Relationship Management

- <http://crmtrackinggenie.com/index.php?main=index> is the link which is used to manage Customer relationship management ( CRM ).
- Customer relationship management ( CRM ) is used for following:
  - **Enquiry entry:**
    - Mode of enquiry can be online, telephonic, through email, personal meeting, requirement of existing customers.
    - Only online enquiries can be added automatically, Otherwise salesperson needs to enter the details related to the enquiry.
  - Entry of follow ups for meeting with customers.
  - Comment / feedback of client.
  - Overdue enquiries list.
  - List of follow ups.
  - List of enquiries.
  - Entry of customer details related to an enquiry.



# Customer Relationship Management

- **Executives enquiry chart:**

- In this chart, details about the enquiries for a particular employee is shown on dashboard.





# Customer Relationship Management

- **List of Follow up on Dashboard:** You can see list of latest follow ups on dashboard by clicking on view more, you will see list of all follow ups:

Follow Up			
Customer Name	Executive Name	Follow Up Date Time	Due On
Hymalaya Heavy Lifter pvt ltd	Yogesh	10/05/2017 03:22 PM	Today
MADAR KHAN	Yogesh	10/05/2017 04:14 PM	Today
Nilesh Patel	Ajeet	10/05/2017 11:10 AM	Today
Michael	Akshay	10/05/2017 12:42 PM	Today
MINERAL MINING AND INDUSTRIES	Narendra	10/05/2017 04:22 PM	Today
Aiju Thomas	Akshay	10/05/2017 04:43 PM	Today
Pawan Mansinghani	Akshay	10/05/2017 03:41 PM	Today
Subhendra kumar	Akshay	10/05/2017 11:21 PM	Today
MAhesh	Akshay	10/05/2017 11:48 PM	Today
Dhruv	Akshay	10/05/2017 11:48 PM	Today
<a href="#">View More</a>			



# Customer Relationship Management

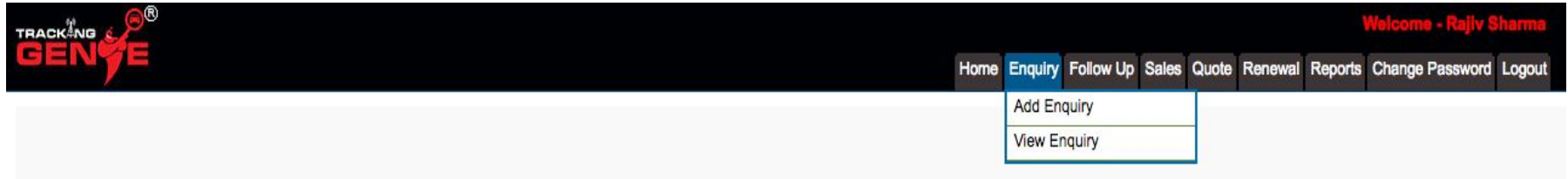
- **List of overdue Enquiries & Follow ups on Dashboard:** You can see list of overdue enquiries & follow ups on dashboard by clicking on view more, you will see full list:

Overdue Enquiry & Follow up			
Enquiry No.	Customer Name	Follow Up Date	Late
TG/17/ENQ/12449	Jyotendra	13/02/2017	86 days
TG/17/ENQ/12503	SHASHIKANT ACHYUT JOSHI	14/02/2017	85 days
TG/17/ENQ/12507	anurag	14/02/2017	85 days
TG/17/ENQ/12530	mILIND	14/02/2017	85 days
TG/17/ENQ/12668	xavier	17/02/2017	82 days
TG/17/ENQ/12720	naves	18/02/2017	81 days
TG/17/ENQ/12665	Divya kumar Goyal	20/02/2017	79 days
TG/17/ENQ/12025	Ola cab	20/02/2017	79 days
TG/17/ENQ/12495	Antaryami Barik	21/02/2017	78 days
TG/17/ENQ/12714	vineet tandon	21/02/2017	78 days
<a href="#">View More</a>			



# Customer Relationship Management

- **Enquiry tab:** By clicking on enquiry tab you will see two links as shown in the image:





# Customer Relationship Management

- **Enquiry tab:** When you click on add enquiry. The following page will open:

**Enquiry Information**

**Customer Information**

Enquiry No	<input type="text" value="TG/18/ENQ/1247"/>	Enquiry Date	<input type="text" value="10/05/2017"/>
Name *	<input type="text"/>	Date Of Birth	<input type="text"/> Age <input type="text"/>
Landmark	<input type="text"/>	Sex	<input type="text" value="Select Gender"/>
Address(Off.)	<input type="text"/>		
City *	<input type="text"/>	Email	<input type="text"/>
Phone(Off.)	<input type="text"/>		
Mobile *	<input type="text" value="+91-"/>		
Availability(Time At):	Res. <input type="text"/> <input type="text" value="Sel"/>	Office <input type="text"/> <input type="text" value="Sel"/>	Customer Source* <input type="text" value="Select Source"/>

**Product Information**

Product Name *	<input type="text" value="Select Product"/>	Quantity *	<input type="text"/> +
Comment By Client/Executive	<input type="text"/>		
Comment By Executive	<input type="text"/>		





# Customer Relationship Management

- **Add Enquiry:** Fields marked with red star are mandatory fields. The form contains following fields:
  - **Enquiry No:** Auto Generated
  - **Enquiry Date:** By default present date.
  - **Name:** Name of customer ( Mandatory field ).
  - **Date of Birth:** Date of birth of customer.
  - **Landmark:**
  - **Sex:** Gender of customer( value given in the dropdown list ).
  - **Address( Office ):** address of customer's office.
  - **City:** City of customer ( Mandatory field ).
  - **Email:** Email Id of customer.
  - **Phone( Office ):** Phone of customer's office.
  - **Mobile:** Mobile number of customer.
  - **Availability Time:** Customer's availability time at office as well as at residence.



# Customer Relationship Management

- **Customer source:** Source of information for customer find the values in dropdown list. It's a mandatory field.
- **Product Name:** Enter the product from drop down list in which the customer has shown interest. It's a mandatory field.
- **Quantity:** Enter the quantity required by the customer. It's a mandatory field.
- **Comment By Client/Executive:** This field contains the comment given by client.
- **Comment By Executive:** This field contains the comment given by executive.
- **Buttons Add Follow Up & Negative Close:** Explained in next slide.



# Customer Relationship Management

- **Add Follow Up button:** Follow up means what action a sales person will take on the given enquiry. By clicking on Follow Up button a form will open as shown in image:

Add Follow up

Negative Close

Followup Information

Follow Up Mode \*

-----Select Mode-----

Follow Up Date \*

10/05/2017

Time\*

12:51

PM

Executive \*

Rajiv

Enquiry Type

-----Select Type-----

Comments by Client/Executive \*

Submit

Reset



# Customer Relationship Management

- **Add Follow up fields:** Fields marked with red star are mandatory fields. The form contains following fields:
  - **Follow Up Mode:** This will show how a sales person contacts with the customer. Values are Telephone, Email and Personal Meet.
  - **Follow Up Date:** Mandatory field shows the date of follow up.
  - **Executive:** Select the executive from the list.
  - **Comments by Clients/Executives:** Comment about the follow up.



# Customer Relationship Management

- **Negative Close button:** Negative close means that the customer is not interested in buying any product. In such a case, sales executive just needs to fill the reason and submit this form.

A screenshot of a web form for Customer Relationship Management. The form is titled "Negative Close" and includes a label "Enter Reason\*" with a red asterisk. Below the label is a large text input field. At the bottom of the form are two buttons: "Submit" (red) and "Reset" (dark grey). Above the input field, there are two red buttons: "Add Follow up" and "Negative Close".



# Customer Relationship Management

- When you click on view enquiry in enquiry tab as shown in slide 46 you will see the following page:

**Enquiry Status**+ Add Enquiry

Enquiry No:

Customer Name:

Executive Name:

Mobile No:

Start Date:

End Date:

Search

Show All

☒ Positive Closed.

☐ Negative Closed.

☐ Junk Enquiry.

☐ Open Enquiry.

Enquiry No	Enquiry Date	Customer	Mobile	Executive	Customer Source	Campaign	Follow-Up	Status	Add Quote
1247	10/05/2017	Ashok singla	7814002345	Ajeet	Google		0	Open	<a href="#">Add Quote</a>
1246	10/05/2017	sunil kumar	9490404900	Ritu	Google		0	Open	<a href="#">Add Quote</a>
1245	10/05/2017	Bhoma ram	8780088576	Akshay	Google Adword	Car Tracking System	0	Open	<a href="#">Add Quote</a>
1244	10/05/2017	MAHIPAL GURJAR	8860381890	Santosh	Existing Customer		2	Open	<a href="#">Add Quote</a>
1243	10/05/2017	supreeth	9916565556	Ritu	Google		0	Open	<a href="#">Add Quote</a>
1242	10/05/2017	Rama Furniture Industries	9649909410	Ritu	Existing Customer		1		<a href="#">Add Quote</a>
1241	10/05/2017	HAREESH NAIDU P	9490825026	Akshay	Google		0	Open	<a href="#">Add Quote</a>
1240	10/05/2017	Virendra Singh	9828158444	Prateek	Personal Reference		1		<a href="#">Add Quote</a>
1239	10/05/2017	Eshak	9844024240	Sadiya	Google		1	Open	<a href="#">Add Quote</a>



# Customer Relationship Management

- **Enquiry Status:**

- **Positive closed** means the enquiry is successful and order has been taken. ☐ Positive Closed.
- **Negative closed** means the enquiry is not successful. ☐ Negative Closed.
- **Junk Enquiry** means the information provided by the customer is not correct. May be the enquiry is just for fun. ☐ Junk Enquiry.
- **Open Enquiry** means the order neither finalized nor canceled. ☐ Open Enquiry.

- **Fields in enquiry filtering:**

- **Enquiry No.**
- **Customer Name**
- **Executive Name**
- **Mobile No.**
- **Start Date**
- **End Date**



# Customer Relationship Management

- When you click on follow up of the list shown in image on slide 53, you'll see the following page:

## Executive Follow Up Details

Enquiry No. : TG/18/ENQ/1264      Enquiry Date : 2017-05-11

Customer Name : Deepak Singh

Phone(Off.) : 8888484178

Availability(Time At) : (Res.)

Email Address : deepak.singh@orcastudio.co

Client Comment : provide demo

Address(Off.) :

Mobile No : 8888484178

Availability(Time At) : (Off.)

Executive Name : Akshay Puraswani

Add Follow up

Positive Close

Negative Close





# Customer Relationship Management

- When you click on **follow up tab** as shown in slide 46 you will see the following page:

## View Follow Up

Enquiry No:	<input type="text"/>	Follow up Mode:	<input type="text"/>	Executive Name:	----- Select Executive ----- ▾	
Mobile No:	<input type="text"/>	Start Date:	<input type="text" value="10/05/2017"/>	End Date:	<input type="text" value="10/05/2017"/>	
					<input type="button" value="Search"/>	<input type="button" value="Show All"/>

☒ Positive Closed.

☐ Negative Closed.

☐ Follow up attended or Executive Comment.

☐ No action taken by Executive.

S.No.	Enquiry No	Enquiry Date	Customer Name	Mobile	Executive	Follow date & Time	Follow-Up Mode	Performa Invoice	Add Quote	Create Demo
1.	TG/17/ENQ/13690	09/03/2017	Himalaya Heavy Lifter pvt ltd	02227816901	Yogesh	10/05/2017 03:22 PM	Telephone	Add Performa	Add Quote	Create Demo
2.	TG/17/ENQ/13661	09/01/2017	MADAR KHAN	9821734307	Yogesh	10/05/2017 04:14 PM	Telephone	Add Performa	Add Quote	Create Demo
3.	TG/18/ENQ/274	13/04/2017	Nilesh Patel	9968194680	Ajeet	10/05/2017 11:10 AM	Telephone	Add Performa	Add Quote	Create Demo
4.	TG/18/ENQ/674	27/04/2017	Michael	0040722(35685	Akshay	10/05/2017 12:42 PM	Telephone	Add Performa	Add Quote	Create Demo
5.	TG/18/ENQ/439	20/04/2017	deepak	9849903636	Sadiya	10/05/2017 12:15 PM	Telephone	Add Performa	Add Quote	Create Demo
6.	TG/18/ENQ/686	27/04/2017	MINERAL MINING AND INDUSTRIES	9413319060	Narendra	10/05/2017 04:22 PM	Telephone	Add Performa	Add Quote	Create Demo
7.	TG/18/ENQ/577	24/04/2017	Ajja Thomas	7411775927	Akshay	10/05/2017 04:43 PM	Telephone	Add Performa	Add Quote	Create Demo
8.	TG/17/ENQ/13755	10/03/2017	RAJEESH	9947544400	Akshay	10/05/2017 11:29 AM	Telephone	Add Performa	Add Quote	Create Demo
9.	TG/17/ENQ/13992	16/03/2017	Pawan Mansinghani	7021768038	Akshay	10/05/2017 03:41 PM	Telephone	Add Performa	Add Quote	Create Demo



# Customer Relationship Management

- When you click on **Add Performa** of **Performa Invoice** from the given list shown on previous slide, you'll see following image:

## Add Performa Invoice

### Performa Order Information

Performa order No

TG/17-18/PINV/205

Customer Name\*

Himalaya Heavy Lifter pvt ltd

Date

10/05/2017

Phone No

Mobile No\*

02227816901

Address\*

MASJID

Product Detail \*

----- Select Product -----

Quantity

Hardware Price

Software Price

Hardware Price

Software Price

+

Description :\*

VAT/CST

Service Tax

Select

Select

Discount Amount

Net Amount

Submit

Reset



# Customer Relationship Management

- **Fields in Performa Invoice:**

- **Performa Order No.:** AutoFill
- **Customer Name:** Autofill with the name of customer.
- **Date:** Autofill with today's date.
- **Phone No.:** Autofill
- **Mobile No.:** Autofill
- **Address:**
- **Product Detail:** it has following sub-fields:
  - **Select Product:** Select the product required by customer from dropdown list.
  - **Quantity:** Quantity required by customer.
  - **Hardware Price:** Enter Hardware price associated with the selected device.
  - **Software Price:** Enter Software price associated with the selected device.
  - **Plus Sign:** By clicking on plus sign you can add multiple Product Detail.
  - **VAT/CST:** Select VAT / CST from dropdown and enter the percentage of VAT/CST.
  - **Service TAX:** Enter the percentage of Service TAX.



# Customer Relationship Management

- You can check the previously created performa invoices:

11.	<a href="#">TG/17/ENQ/14278</a>	26/03/2017	Subhendra kumar	9402173317	Akshay	10/05/2017 11:21 PM	Telephone	<a href="#">Add Performa</a>	<a href="#">Add Quote</a>	<a href="#">Create Demo</a>
12.	<a href="#">TG/17/ENQ/14836</a>	05/04/2017	DAYAL ROY	9932248644	Akshay	10/05/2017 11:40 PM	Telephone	<a href="#">Add Performa</a>	<a href="#">Add Quote</a>	<a href="#">Create Demo</a>
13.	<a href="#">TG/17/ENQ/14502</a>	30/03/2017	MAhesh	9702752189	Akshay	10/05/2017 11:48 PM	Telephone	<a href="#">Add Performa</a>	<a href="#">Add Quote</a>	<a href="#">Create Demo</a>
14.	<a href="#">TG/17/ENQ/14153</a>	22/03/2017	Dhruv	9699997100	Akshay	10/05/2017 11:48 PM	Telephone	<a href="#">Add Performa</a>	<a href="#">Add Quote</a>	<a href="#">Create Demo</a>
15.	<a href="#">TG/17/ENQ/14162</a>	23/03/2017	MD Shahid	7000874200	Akshay	10/05/2017 11:48 PM	Telephone	<a href="#">Add Performa</a>	<a href="#">Add Quote</a>	<a href="#">Create Demo</a>
16.	<a href="#">TG/17/ENQ/13911</a>	12/03/2017	vishal	7567980181	Akshay	10/05/2017 11:55 PM	Telephone	<a href="#">Add Performa</a>	<a href="#">Add Quote</a>	<a href="#">Create Demo</a>
17.	<a href="#">TG/17/ENQ/14114</a>	21/03/2017	prashant kumar dehury	8456814232	Akshay	10/05/2017 12:01 AM	Telephone	<a href="#">Add Performa</a>	<a href="#">Add Quote</a>	<a href="#">Create Demo</a>
18.	<a href="#">TG/18/ENQ/447</a>	20/04/2017	Dharamvir	7404385155	Akshay	10/05/2017 12:15 AM	Telephone	<a href="#">Add Performa</a>	<a href="#">Add Quote</a>	<a href="#">Create Demo</a>
19.	<a href="#">TG/18/ENQ/221</a>	12/04/2017	VIPUL JAISWAL	9893565655	Akshay	10/05/2017 12:23 AM	Telephone	<a href="#">Add Performa</a>	<a href="#">Add Quote</a>	<a href="#">Create Demo</a>
20.	<a href="#">TG/17/ENQ/14752</a>	03/04/2017	PRAHALLAD TRIPATHY	9938680356	Akshay	10/05/2017 12:24 AM	Telephone	<a href="#">Add Performa</a>	<a href="#">Add Quote</a>	<a href="#">Create Demo</a>
21.	<a href="#">TG/17/ENQ/14581</a>	31/03/2017	nilesh	8850495752	Akshay	10/05/2017 12:33 AM	Telephone	<a href="#">Add Performa</a>	<a href="#">Add Quote</a>	<a href="#">Create Demo</a>
22.	<a href="#">TG/17/ENQ/14741</a>	02/04/2017	MURULI GOGOI	8752831946	Akshay	10/05/2017 12:33 AM	Telephone	<a href="#">Add Performa</a>	<a href="#">Add Quote</a>	<a href="#">Create Demo</a>
23.	<a href="#">TG/18/ENQ/617</a>	25/04/2017	Dhanraj Nanesha	9363057566	Akshay	10/05/2017 12:33 AM	Telephone	<a href="#">Add Performa</a>	<a href="#">Add Quote</a>	<a href="#">Create Demo</a>
24.	<a href="#">TG/18/ENQ/309</a>	14/04/2017	Harish khan	9617225588	Akshay	10/05/2017 12:33 AM	Telephone	<a href="#">Add Performa</a>	<a href="#">Add Quote</a>	<a href="#">Create Demo</a>
25.	<a href="#">TG/17/ENQ/13189</a>	25/02/2017	Bablu	9541301444	Akshay	10/05/2017 12:33 AM	Telephone	2 & New	<a href="#">Add Quote</a>	<a href="#">Create Demo</a>
26.	<a href="#">TG/18/ENQ/296</a>	14/04/2017	navendu kumar	9334685212	Akshay	10/05/2017 12:33 AM	Telephone	<a href="#">Add Performa</a>	<a href="#">Add Quote</a>	<a href="#">Create Demo</a>
27.	<a href="#">TG/18/ENQ/680</a>	27/04/2017	Souvik Bhattacharjee	8420376603	Akshay	10/05/2017 12:41 AM	Telephone	<a href="#">Add Performa</a>	<a href="#">Add Quote</a>	<a href="#">Create Demo</a>
28.	<a href="#">TG/18/ENQ/459</a>	21/04/2017	Sunil kumar	7023084684	Akshay	10/05/2017 12:41 AM	Telephone	<a href="#">Add Performa</a>	<a href="#">Add Quote</a>	<a href="#">Create Demo</a>



# Customer Relationship Management

- By clicking on **2 & new** from the list you'll see the following image:

## Performa Invoice Status

S.No	Performa No	Enquiry No	Performa Date	Customer	Executive	Total Amount	H/w Tax Amt	S/w Tax Amt	Discount (Rs.)	Net Amount	Cancel Performa	Print	PDF
1	TG/16-17/PINV/2076	TG/17/ENQ/13189	25/02/2017	Bablu	Akshay	6546	804.17	150	0	7500	Cancel		
2	TG/16-17/PINV/2075	TG/17/ENQ/13189	25/02/2017	Bablu	Akshay	6502	797.79	150	0	7450	Canceled		

- You can either print or download the invoice detail in PDF format.
- You can cancel an invoice by clicking on **cancel** button. As shown in the image.



# Customer Relationship Management

- If a customer demands for a demo of any device. You can allow him to see the demo for given time period:
  - 24 Hours
  - 48 Hours
  - 72 Hours
  - 96 Hours
  - 120 Hours
- When you click on create demo link of list shown in slide 51. Select the time period from the dropdown list and submit. A Demo link for specified time will be emailed to customer.

A screenshot of a web form for creating a demo link. The form is enclosed in a light blue border. It contains a label "Activation Hours:" followed by a dropdown menu. The dropdown menu is open, showing the selected option "24 Hours : 1 Day" and a blue downward arrow. Below the dropdown are two buttons: "submit" and "Close".

Activation Hours: 24 Hours : 1 Day

submit Close





# Customer Relationship Management

- **Sales Tab:** When you click on sales tab, following page will open:

## View Sales Order

Sales No:	<input type="text"/>	Enquiry No:	<input type="text"/>	Customer Name:	<input type="text"/>	Mobile No:	<input type="text"/>		
Sales Start Date:	<input type="text"/>		Sales End Date:	<input type="text"/>		Executive Name:	<div>----- Select Executive ----- ▾</div>	<input type="button" value="Search"/>	<input type="button" value="Show All"/>

S.No	Sales No	Sales Date	Enquiry No	Qty	Enquiry Type	PO No	PO Date	Customer Source	Customer Name	Mobile	Executive	Net Amount
1	TG/17-18/ENSALE/199	11/05/2017	TG/18/ENQ/1007	1	Renewal		11/05/2017	Existing Customer	GOPAL BAIRWA	9928056156	Santosh	3400
2	TG/17-18/ENSALE/200	11/05/2017	TG/18/ENQ/964	1	Renewal		11/05/2017	Existing Customer	KALU RAM KUMAWAT	9829252957	Santosh	3370
3	TG/17-18/ENSALE/201	11/05/2017	TG/18/ENQ/574	1	Sales		11/05/2017	Google Adword	MUNESHWAR PRASAD	9911904010	Sadiya	6000
4	TG/17-18/ENSALE/202	11/05/2017	TG/17/ENQ/14709	12	Renewal		11/05/2017	Existing Customer	Pradeep Rathii & Sons	9435018900	Niket	12420
5	TG/17-18/ENSALE/203	11/05/2017	TG/17/ENQ/14714	5	Renewal		11/05/2017	Existing Customer	Sandeep Rathii & Sons	9435018900	Niket	16675
6	TG/17-18/ENSALE/204	11/05/2017	TG/18/ENQ/1042	1	Renewal		11/05/2017	Existing Customer	MAHIPAL SINGH	9928255931	Niket	3150
7	TG/17-18/ENSALE/205	11/05/2017	TG/18/ENQ/975	2	Renewal		11/05/2017	Existing Customer	Bharat Sewa	9314722944	Niket	4600
8	TG/17-18/ENSALE/206	11/05/2017	TG/17/ENQ/14779	1	Renewal		11/05/2017	Existing Customer	USHA ANJUM KHAN	9829200326	Niket	3150
9	TG/17-18/ENSALE/207	11/05/2017	TG/18/ENQ/1047	1	Renewal		11/05/2017	Existing Customer	Kailash Singh	7507295888	Niket	2070
10	TG/17-18/ENSALE/195	10/05/2017	TG/18/ENQ/885	1	Renewal		10/05/2017	Existing Customer	BHANWAR LAL MEGHWAL	9414870235	Santosh	3400



# Customer Relationship Management

- You can search a sale by entering different details as you did for follow up and enquiry.
- You can open full details of a sale by clicking on **Sales No.** of any sales.
- When you click on **sales no.**, you'll see the detailed page as shown in the next slide.





# Customer Relationship Management

Enquiry No. : TG/18/ENQ/1007      Enquiry Date : 04/05/2017      Status : Positive Closed

Customer Name :	GOPAL BAIRWA	Address(Off.) :	S/O RAM JI BAIRWA KESHAVPURA TEH- BASSI JAIPUR.
Phone(Off.) :		Mobile No :	+91-9928056156
Availability(Time At) :	(Res.)	Availability(Time At) :	(Off.)
Email Address :		Executive Name :	Santosh Negi
Client Comment :			
Product Info :	Product Name TG-Lite Plus	Quantity 1	

Quote Information Not Found

Sales Order No. : TG/17-18/ENSALE/199      Sales Order Date : 11/05/2017

Enquiry No. :	TG/18/ENQ/1007	Enquiry Date :	04/05/2017
Purchase Order No. :		Purchase Order Date :	11/05/2017
Customer Name :	GOPAL BAIRWA	Promise Delivery Date :	11/05/2017
Phone No. :		Mobile No. :	+91-9928056156
Performa Invoice No. :	TG/17-18/PINV/207		
Address :	S/O RAM JI BAIRWA KESHAVPURA TEH- BASSI JAIPUR.	Billing Address :	
Shipping Address :			
Specific Requirements :			
Product Info :	Product Name TG-Lite Plus	Quantity 1	Hardware Rate 0
		Software Rate 2956.5	Hardware Amount 0
			Software Amount 2956.5
		Total Amount:	0.00
		Service Tax @14%:	XXXX 413.91
		SB CESS Tax @0.5%:	XXXX 14.78
		KK CESS Tax @0.5%:	XXXX 14.78
		Discount :	0.00
		Net Amount :	3400.00



# Customer Relationship Management

- **Renewal Tab:** When you click on the renewable tab, you'll see two links, as shown below:
  - Expired Devices.
  - Due Renewal.
- When you click on **Expired Devices** link, you'll see the page shown in next slide.
- You can search an expired device by entering different details as you did previously.



# Customer Relationship Management

## Expired Devices Report

Vehicle No:	<input type="text"/>	IMEI No:	<input type="text"/>	Customer Name:	<input type="text"/>
From Date:	<input type="text"/>	To Date:	<input type="text"/>	<input type="button" value="Search"/>	<input type="button" value="Show All"/>

S.No	Customer Name	Vehicle No.	IMEI No.	Installation Date	Subscription Type	Expired Date	Mobile No.	Address	Add To Enquiry
1.	TATA POWER ULTRA LITE	MH01CG9315	358899052715029	02-02-2017	1 month	02-03-2017	1234567891	" The Tata Power Company Limited, Dharavi Receiving Station, Near Shalimar Industrial Estate, Matunga, Mumbai 400 019, Maharashtra, India extn 2305 Mobile: 8097008146"	Add
2.	TATA POWER ULTRA LITE	MH47J3224	358899052707299	03-12-2016	1 month	03-01-2017	1234567891	" The Tata Power Company Limited, Dharavi Receiving Station, Near Shalimar Industrial Estate, Matunga, Mumbai 400 019, Maharashtra, India extn 2305 Mobile: 8097008146"	Add
3.	Jabalpur City Transport Services Limited	MP20PA0449 SDT	355488020515594	10-08-2016	3 month	10-11-2016	9109919790	Chief Executive Officer Jabalpur City Transport Services Limited, Jabalpur Phone No.:- 0761-4014501 Fax :- 0761-2624200 E-mail-jctsl_2006@yahoo.co.in	Add
4.	Jabalpur City Transport Services Limited	MP20PA0668 SDT R	004021924300	10-08-2016	3 month	10-11-2016	9109919790	Chief Executive Officer Jabalpur City Transport Services Limited, Jabalpur Phone No.:- 0761-4014501 Fax :- 0761-2624200 E-mail-jctsl_2006@yahoo.co.in	Add
5.	Mission Director - National Health Mission	RJ14PB2046	12032661	18-06-2016	1 month	18-07-2016	9887283641	NHM Swasthya Bhawan ,Tilak Marg Jaipur 302005	Add
6.	Jabalpur City Transport Services Limited	MP20PA0741 MNT	041028753948	13-06-2016	3 month	13-09-2016	9109919790	Chief Executive Officer Jabalpur City Transport Services Limited, Jabalpur Phone No.:- 0761-4014501 Fax :- 0761-2624200 E-mail-jctsl_2006@yahoo.co.in	Add
7.	TATA Communication	DL9CQS4371 DELHI LOCATION	869103028001974	10-06-2016	1 month	10-07-2016	8080978446	VSB,Bangla Sahib Road,New Delhi-110001 INDIA brijesh.Pandey@tatacommunications.com 84B AMBA BHAVAN 5TH FLOOR	Add



# Customer Relationship Management

- When you click on **Add** link of **Add To Enquiry** column in the list given on previous slide, you'll see all the details. If a new enquiry has arrived then you have to click on "Add Enquiry" to add this new enquiry.
- You can see the detailed page on next slide.



# Customer Relationship Management

Executive Name:

Rajiv Sharma

Customer Name : TATA POWER ULTRA LITE

Email :

Address : \* The Tata Power Company Limited, Dharavi Receiving Station, Near Shalimar Industrial Estate, Matunga, Mumbai 400 019, Maharashtra, India extn 2305 Mobile: 8097008146\*

City : 713

Expiry Date : 02-03-2017

Vehicle No. : MH01CG9315

Chasis No. : MH01CG9315

IMEI No. : 358899052715029

Last Data : No Data

Company Name : K.S TECHNOSOFT

Username. : TATAPOWERULTRA

Mobile No. : 1234567891

State : 21

subscription type : Monthly

Engine No. : MH01CG9315

Vehicle Make : MH01CG9315

Installation Date : 02-02-2017

Followup Date : 11-05-2017

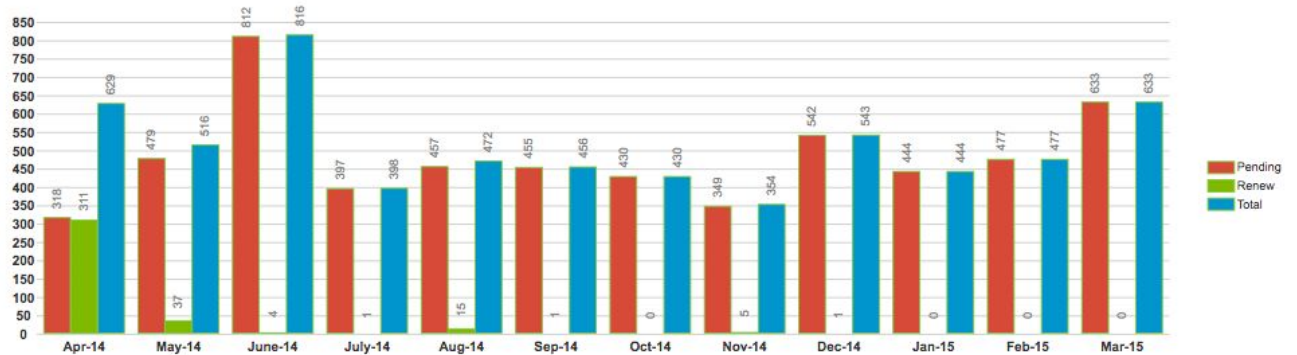
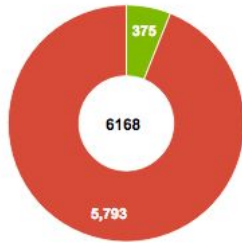
Add to Enquiry



# Customer Relationship Management

- **Due Renewal:** When you click on **due renewal** link of **renewal tab**, you will see month wise report as shown in following two images:

Financial Year : 2017-2018





# Customer Relationship Management

- In the given table, column 1st indicates first week and so on.

Month	1st			2nd			3rd			3+			Total		
	Total	Renew	Pending	Total	Renew	Pending	Total	Renew	Pending	Total	Renew	Pending	Total	Renew	Pending
APR-17	335	101	234	205	157	48	48	29	19	41	24	17	629	311	318
MAY-17	367	18	349	72	10	62	53	5	48	24	4	20	516	37	479
<b>Total</b>	<b>702</b>	<b>119</b>	<b>583</b>	<b>277</b>	<b>167</b>	<b>110</b>	<b>101</b>	<b>34</b>	<b>67</b>	<b>65</b>	<b>28</b>	<b>37</b>	<b>1145</b>	<b>348</b>	<b>797</b>
JUNE-17	623	2	621	122	2	120	35	0	35	36	0	36	816	4	812
JULY-17	285	0	285	55	0	55	29	0	29	29	1	28	398	1	397
AUG-17	293	0	293	85	2	83	46	10	36	48	3	45	472	15	457
SEP-17	322	0	322	53	0	53	43	0	43	38	1	37	456	1	455
OCT-17	279	0	279	66	0	66	66	0	66	19	0	19	430	0	430
NOV-17	240	5	235	50	0	50	27	0	27	37	0	37	354	5	349
DEC-17	283	1	282	139	0	139	96	0	96	25	0	25	543	1	542
JAN-18	235	0	235	116	0	116	62	0	62	31	0	31	444	0	444
FEB-18	264	0	264	101	0	101	63	0	63	49	0	49	477	0	477
MAR-18	390	0	390	127	0	127	93	0	93	23	0	23	633	0	633
<b>Total</b>	<b>3916</b>	<b>127</b>	<b>3789</b>	<b>1191</b>	<b>171</b>	<b>1020</b>	<b>661</b>	<b>44</b>	<b>617</b>	<b>400</b>	<b>33</b>	<b>367</b>	<b>6168</b>	<b>375</b>	<b>5793</b>



# Customer Relationship Management

- **Reports Tab:** Following are the parts of reports tab:
  - Junk Enquiries
  - Enquiry without sales
  - Non-reply: Demo Request
  - Periodic Performance Chart
  - Pending Renewal



# Sales Process



# Sales Process

- **Various channels of sales :**
  - Individual sales
  - Corporate sales
  - Reseller
  - Distributor



## Contd... Sales Process

- **SOP followed :**
  - Understand the requirements of client.
  - Explain the features and functionality of the product.
  - Sending mail to the client in which we share the following things:
    - Company Overview.
    - Demo Credentials.
    - Features of the proposed product.
    - Pricing



## Contd... Sales Process

- **Clientele**
  - Follow up with the client until they purchase it or repudiate it.
  - If client shows interest in purchasing the unit we will mail our company account details along with the required details which we need for creating the invoice and account.
- **Details required:**
  - Billing name
  - Shipping and installation address
  - Vehicle type & Make.
  - KYC details and RC documents (these have to be submitted upon installation to our technician).



# Creating Sales Order

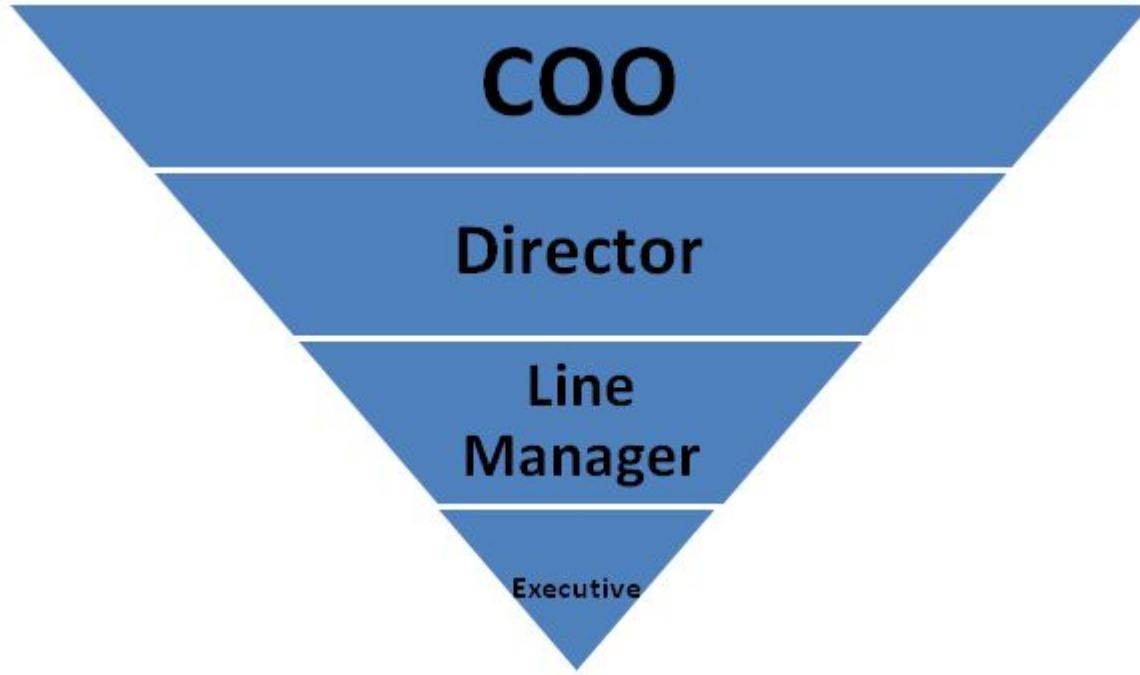
- An executive needs to create a sales order in an excel format after a client places an order to buy. The sales order format should contain the following details:
  - Sales Order Details
  - Customer Details
  - Purchase order Details
  - Payment Details
  - Vehicle Information
  - Dispatch Mode
- A copy of sales order is mailed to the team leader, accounts department and technician department. Accounts executive creates an account of the concerned client on our system and technician department arranges for installation visit.

# Escalation Matrix

# Escalation Matrix

- If a sales executive faces any issue or has a query which they themselves are not able to solve, then these issues can be escalated to three next levels. Here is how this works:
  - Any issue of an executive can be notified/communicated by email to their immediate line manager.
  - If the issue is not resolved, the complaint will be escalated to the Director by email.
  - If the issue still remains unsolved and needs further consideration, the complaint will be escalated to the company COO by email.

# Escalation Chart





# Pricing & Discount Slabs

Single order qty		Bike	Ultra	Ultra +	Lite +	Pro	Super	Fuel Sensor	Camera
For 1 to 5 Devices	Basic Price/Device	3,681	4,009	5,590	7,022	8,904	8,629	6,349	4,603
	Cost of Software	900	1,000	1,500	2,400	2,700	2,900	200	200
	<b>SP incl. taxes</b>	<b>5,250</b>	<b>5,740</b>	<b>8,125</b>	<b>10,800</b>	<b>13,300</b>	<b>13,215</b>	<b>7,500</b>	<b>5,500</b>
For 6 to 10 Devices	Basic Price/Device	3,655	3,965	5,520	6,939	8,790	8,520	6,262	4,384
	Cost of Software	900	1,000	1,500	2,400	2,700	2,900	200	200
	<b>SP incl. taxes</b>	<b>5,220</b>	<b>5,690</b>	<b>8,045</b>	<b>10,705</b>	<b>13,170</b>	<b>13,090</b>	<b>7,400</b>	<b>5,250</b>
For 11 to 15 Devices	Basic Price/Device	3,616	3,913	5,450	6,847	8,690	8,419	6,087	4,384
	Cost of Software	900	1,000	1,500	2,400	2,700	2,900	200	200
	<b>SP incl. taxes</b>	<b>5,175</b>	<b>5,630</b>	<b>7,965</b>	<b>10,600</b>	<b>13,055</b>	<b>12,975</b>	<b>7,200</b>	<b>5,250</b>
For 16 to 20 Devices	Basic Price/Device	3,559	3,869	5,393	6,760	8,581	8,310	6,087	4,384
	Cost of Software	900	1,000	1,500	2,400	2,700	2,900	200	200
	<b>SP incl. taxes</b>	<b>5,110</b>	<b>5,580</b>	<b>7,900</b>	<b>10,500</b>	<b>12,930</b>	<b>12,850</b>	<b>7,200</b>	<b>5,250</b>
For 21 to 25 Devices	Basic Price/Device	3,528	3,821	5,323	6,673	8,467	8,201	6,087	4,384
	Cost of Software	900	1,000	1,500	2,400	2,700	2,900	200	200
	<b>SP incl. taxes</b>	<b>5,075</b>	<b>5,525</b>	<b>7,820</b>	<b>10,400</b>	<b>12,800</b>	<b>12,725</b>	<b>7,200</b>	<b>5,250</b>
For 25 to 50 Devices	Basic Price/Device	3,485	3,773	5,249	6,581	8,363	8,092	6,087	4,384
	Cost of Software	900	1,000	1,500	2,400	2,700	2,900	200	200
	<b>SP incl. taxes</b>	<b>5,025</b>	<b>5,470</b>	<b>7,735</b>	<b>10,295</b>	<b>12,680</b>	<b>12,600</b>	<b>7,200</b>	<b>5,250</b>
For 51 or more Devices	Basic Price/Device	3,437	3,724	5,183	6,489	8,249	7,983	6,087	4,384
	Cost of Software	900	1,000	1,500	2,400	2,700	2,900	200	200
	<b>SP incl. taxes</b>	<b>4,970</b>	<b>5,415</b>	<b>7,660</b>	<b>10,190</b>	<b>12,550</b>	<b>12,475</b>	<b>7,200</b>	<b>5,250</b>
<b>MRP/ Device</b>		<b>6,000</b>	<b>6,500</b>	<b>8,750</b>	<b>11,500</b>	<b>13,500</b>	<b>13,000</b>	<b>8,000</b>	<b>5,500</b>

Please Note-

1. This list is confidential not to be shared with client. Prices to be quoted on case to case basis

Prepared By

Reviewed By

Approved By

2. Installation cost to be charged separately."



# Complaint Management System



# Complaint Management System

- <http://support.trackinggenie.com/> is the link used for complaint management.

The screenshot shows the 'SUPPORT TICKET SYSTEM' interface for Tracking Genie. At the top, there is a navigation bar with links for 'Home', 'New Ticket', and 'Ticket Status'. Below the navigation bar, a welcome message states: 'Welcome to the support center. In order to streamline support requests and better serve you, we utilize a support ticket system. Every support request is assigned a unique ticket number which you can use to track the progress and responses online. For your reference we provide complete archives and history of all your support requests. A valid email address is required.' The main content area is divided into two columns. The left column is titled 'Open A New Ticket' and includes a green plus icon, a description: 'Please provide as much detail as possible so we can best assist you. To update a previously submitted ticket, please use the form to the right.', and a button labeled 'Open New Ticket'. The right column is titled 'Check Ticket Status' and includes a blue information icon, a description: 'We provide archives and history of all your support requests complete with responses.', and a form with fields for 'Email:' and 'Ticket#:', followed by a button labeled 'Check Status'. The footer of the page contains the text: 'Copyright © osTicket.com. All rights reserved'.

**TRACKING GENIE** SUPPORT TICKET SYSTEM

[Home](#) [New Ticket](#) [Ticket Status](#)

**Welcome to the support center**

In order to streamline support requests and better serve you, we utilize a support ticket system. Every support request is assigned a unique ticket number which you can use to track the progress and responses online. For your reference we provide complete archives and history of all your support requests. A valid email address is required.

**Open A New Ticket**  
Please provide as much detail as possible so we can best assist you. To update a previously submitted ticket, please use the form to the right.  
[Open New Ticket](#)

**Check Ticket Status**  
We provide archives and history of all your support requests complete with responses.  
Email:   
Ticket#:   
[Check Status](#)

Copyright © osTicket.com. All rights reserved



# Complaint Management System

- **Open new ticket:** Whenever a client has any problem, he can generate a token for the complaint by clicking on **Open new ticket** button given on the home page:
- When a client clicks on Open new ticket button a page, shown on next slide will be opened:



# Complaint Management System

Please fill in the form below to open a new ticket.

Full Name:	<input type="text"/>	*
Email Address:	<input type="text"/>	*
Attach File	<input type="button" value="Choose file"/> No file chosen	
Telephone:	<input type="text"/> Ext <input type="text"/>	
Help Topic:	<input type="button" value="Select One"/>	*
Subject:	<input type="text"/>	*
Tracking Genie User Name:	<input type="text"/>	
Vehicle No:	<input type="text"/>	
Message:	<div></div>	

Please specify your User Id or Vehicle No or IMEI No to help our support executives resolve the issue.

Please answer the following question to help us to resolve your problem

Vehicle Make :	<input type="text"/>	*
Is vehicle regularly moving, if no since when vehicle has not moved?	<input type="text"/>	*
Did the vehicle went through any repair in recent past?	<input type="button" value="---Select---"/>	*
Did the vehicle went for regular servicing in last few days?	<input type="button" value="---Select---"/>	*
Did vehicle met any accident in recent past?	<input type="button" value="---Select---"/>	*
Are the GSM and GPS socket property tightened?	<input type="button" value="---Select---"/>	*
Have you sent restart command?	<input type="button" value="---Select---"/>	*


Captcha Text:   Enter the text shown on the image.



# Complaint Management System

- A client can check status of ticket by filling the information in **Check Ticket Status**:
- Fill the information related to ticket as shown in image:

---



### Check Ticket Status

We provide archives and history of all your support requests complete with responses.

Email:

aman.kumar.khurana1@gmail.com

Ticket#:






53975

Check Status



# Complaint Management System

- When you click on check status after filling the information following window will open:

<a href="#">Home</a> <a href="#">New Ticket</a> <a href="#">My Tickets</a> <a href="#">Log Out</a>					
Showing 1 - 5 of 5 All Tickets			<a href="#">View Open</a> <a href="#">View Closed</a> <a href="#">Refresh</a>		
Ticket #	Create Date	Status	Subject	Department	Email
 53975	05/09/2017	Open	New installation-37542212	Technical	aman.kumar.khurana1@gmail.com
 51963	02/04/2017	Closed	Device not updating the location on ...	Support	aman.kumar.khurana1@gmail.com
 50612	12/08/2016	Closed	Location issue	Support	aman.kumar.khurana1@gmail.com
 47203	07/23/2016	Closed	(Pending for Kyc)New ...	Support	aman.kumar.khurana1@gmail.com
 45670	05/26/2016	Closed	New installation-355488020196201	Support	aman.kumar.khurana1@gmail.com





# Complaint Management System

- When you click on a particular ticket number you will see details related to that ticket as shown below:

[Home](#) [New Ticket](#) [My Tickets](#) [Log Out](#)

**Ticket #53975**

<b>Ticket Status:</b> open	<b>Name:</b> Aman kumar khurana
<b>Department:</b> Technical	<b>Email:</b> aman.kumar.khurana1@gmail.com
<b>Create Date:</b> 05/09/2017 3:43 pm	<b>Phone:</b> (992) 889-8888
<b>TG Username:</b> AKHURANA	<b>Vehicle No:</b> RJ14GH8160

**Subject:** New installation-37542212

**Ticket Thread**

**Tue, May 9 2017 4:43pm**  
Ticket created by staff

**Tue, May 9 2017 4:25pm - Nilesh Bhati**  
Dear Sir/Madam  
Greetings of the day!  
  
VTS device no 37542212 is successfully installed in vehicle/chassis no RJ14GH8160 at 30, Macheda, Jamna Puri, Jaipur, Rajasthan 302032, India .  
  
TECHNICIAN NAME :Gajendra  
DEVICE CODE:573851  
VEHICLE TYPE/MAKE:Bharat Benz Truck  
DATA CHECK : YES  
RELAY CONNECTION: YES/24 VOLT  
INSTALLATION DATE & TIME : 09-05-2017 13:56:01

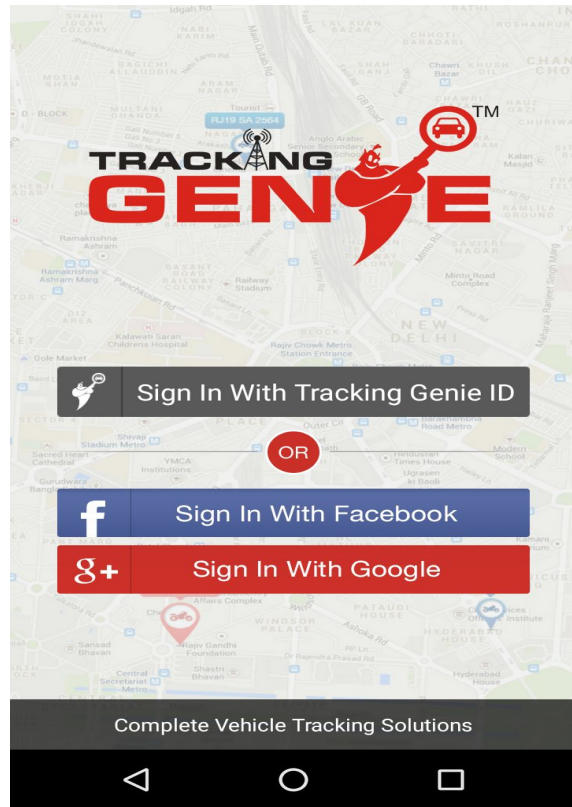


# Mobile Apps



# Mobile Apps

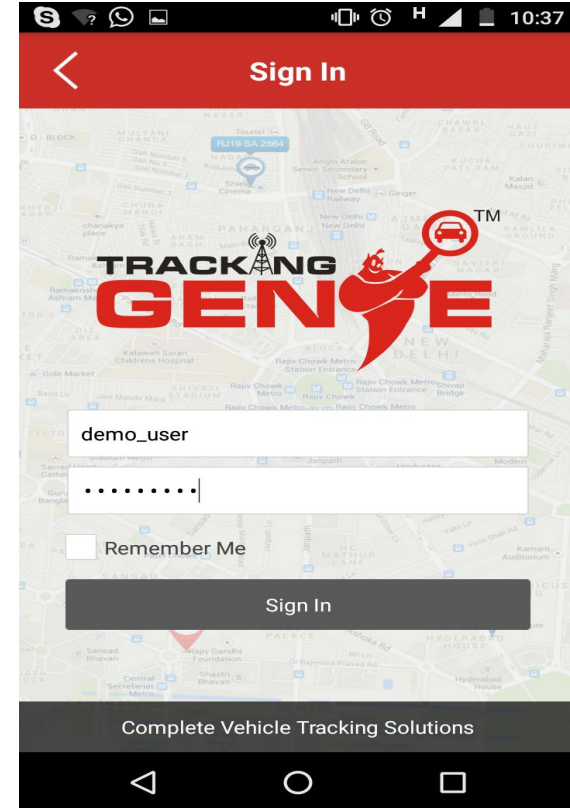
- You can download the mobile app for android phones from playstore.
- You can search the play store by writing **TGenie** or **TrackingGenie**.
- When you download and install **TGenie** app. You'll see first page as shown in image.
- You can sign in with:
  - Tracking Genie ID
  - Facebook
  - Google





## Contd... Mobile Apps

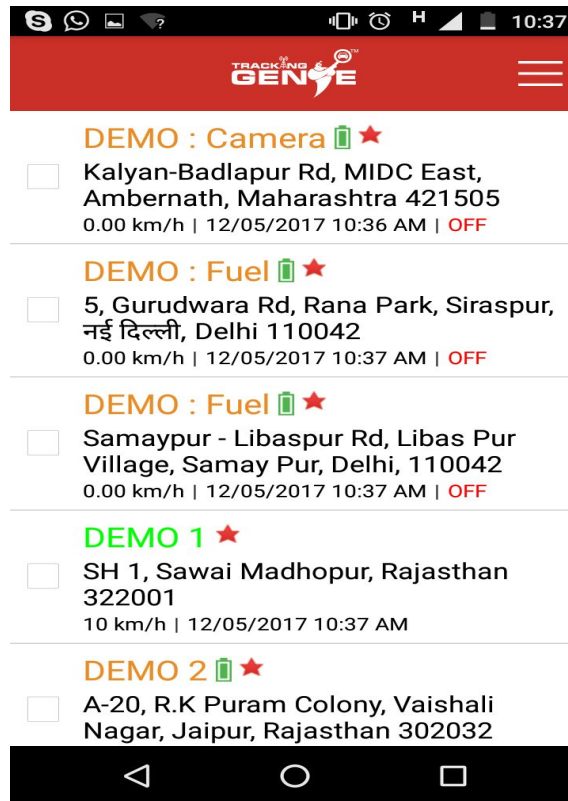
- When you click on **Sign IN with Tracking Genie ID** button.
- Screen as shown in the image will open.
- Enter your username and password to login.





## Contd... Mobile Apps

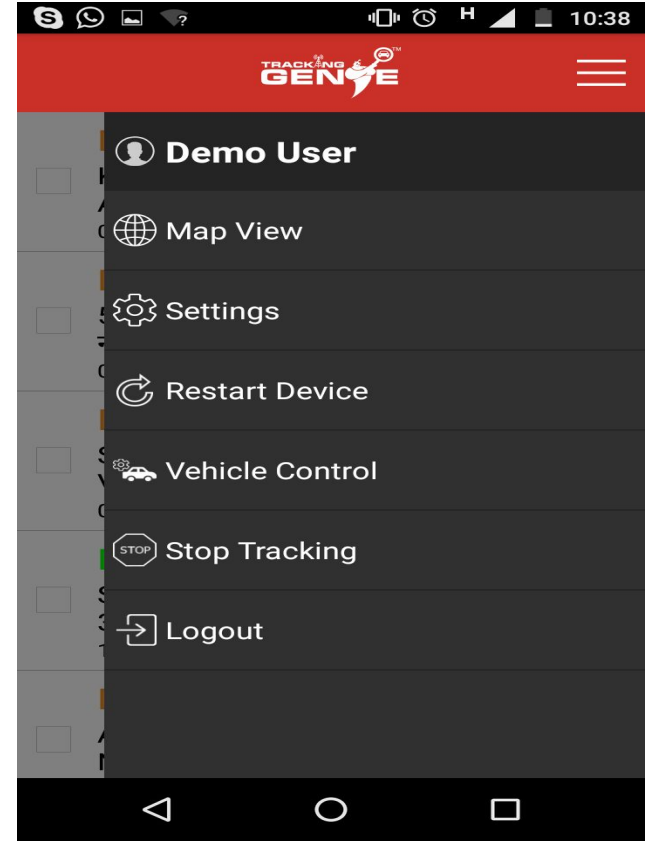
- When you login, screen as shown in the image will be open.
- This page contains list of devices installed for a particular client.
- Different color in the list shows the status of the vehicle:
  - **Red Color** shows that vehicle is not running.
  - **Green color** means vehicle is running.
  - **Gray color** shows that the device has expired.





## Contd... Mobile Apps

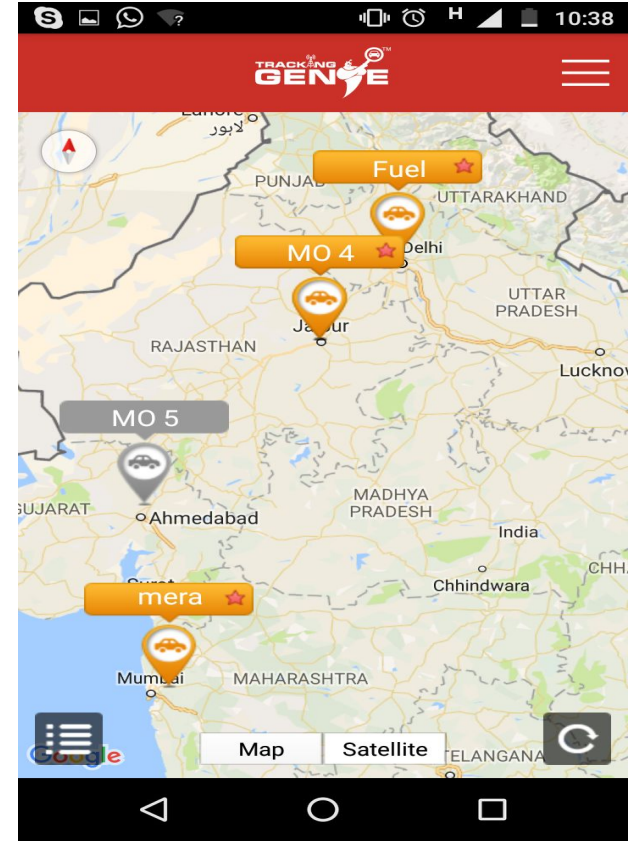
- When you click on menu icon present in TOP right corner of previous image you'll see a screen as shown in image.
- There are different menu items which we'll understand in next slides.





## Contd... Mobile Apps

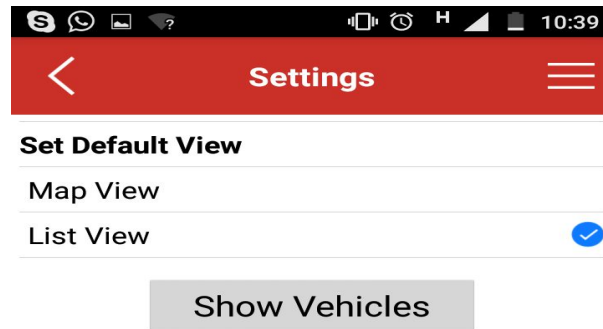
- When you click on **map view** from the menu list, you'll see the map view with annotation of different devices with their location on the MAP.
- The screen will look like the one shown in the image.





## Contd... Mobile Apps

- When you click on **settings** from the menu list, a screen similar to the image will open.
- There are two views in which you can see your devices.
  - Map View
  - List View

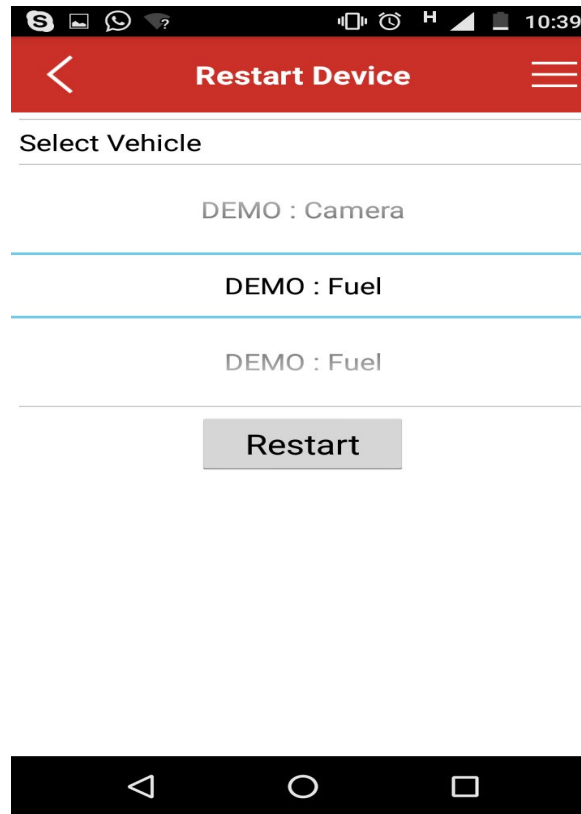






## Contd... Mobile Apps

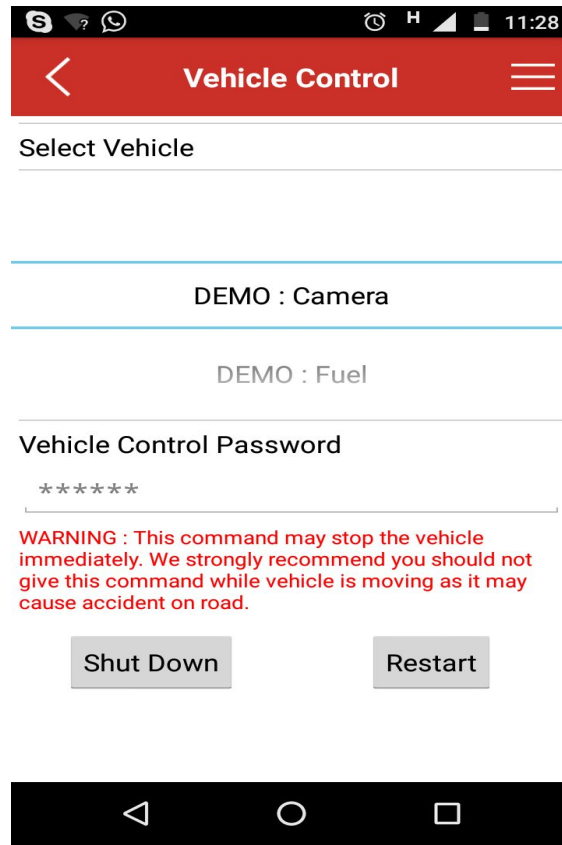
- When you click on **Restart Devices** from the menu list select the device which you want to restart.
- You can see list of devices as shown in the image.
- After selecting the device, press the restart button.
- The device will be restarted.





## Contd... Mobile Apps

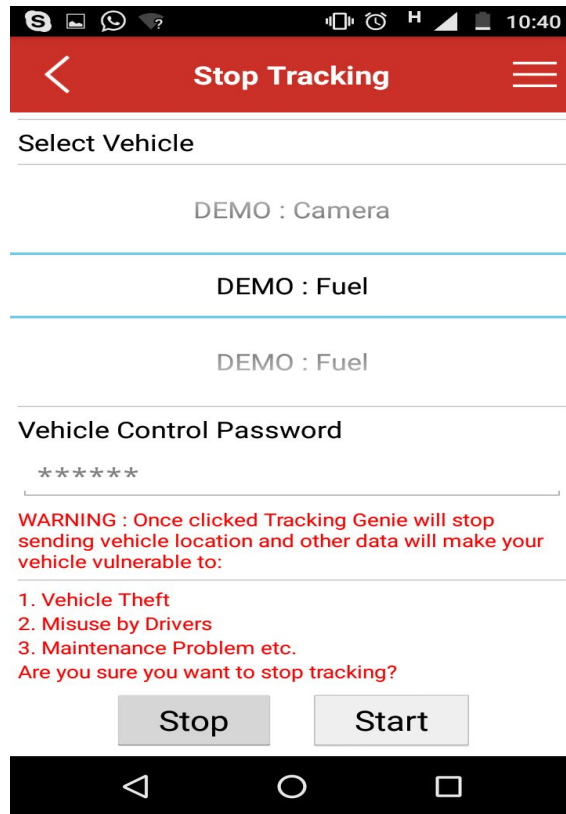
- When you click on **Vehicle Control** from the menu list.
- Screen will open as shown in following image.
- You can **Shutdown** or **restart** a device by entering the **Vehicle Control Password**.





## Contd... Mobile Apps

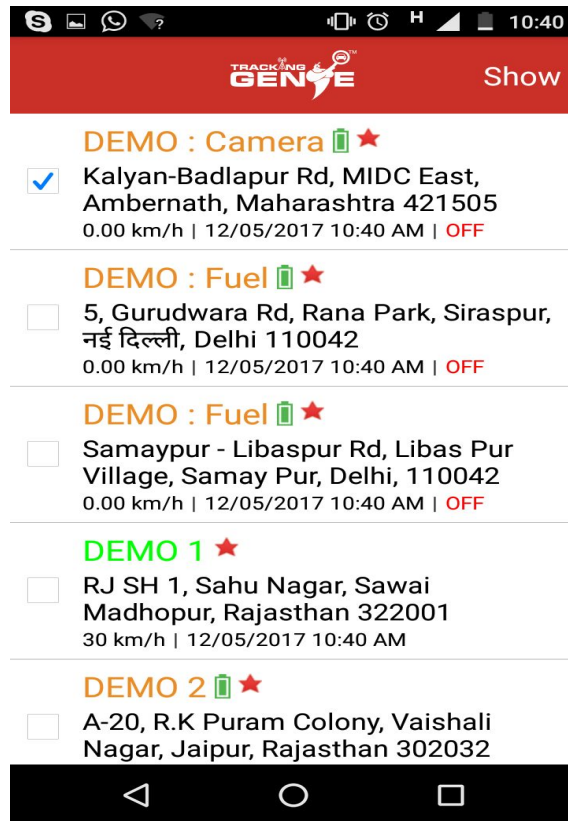
- When you click on **Stop Tracking** from the menu list.
- Screen will open as shown in following image.
- You can stop tracking your vehicle by entering the vehicle control password.
- And click on Either **Stop** or **Start** button.





## Contd... Mobile Apps

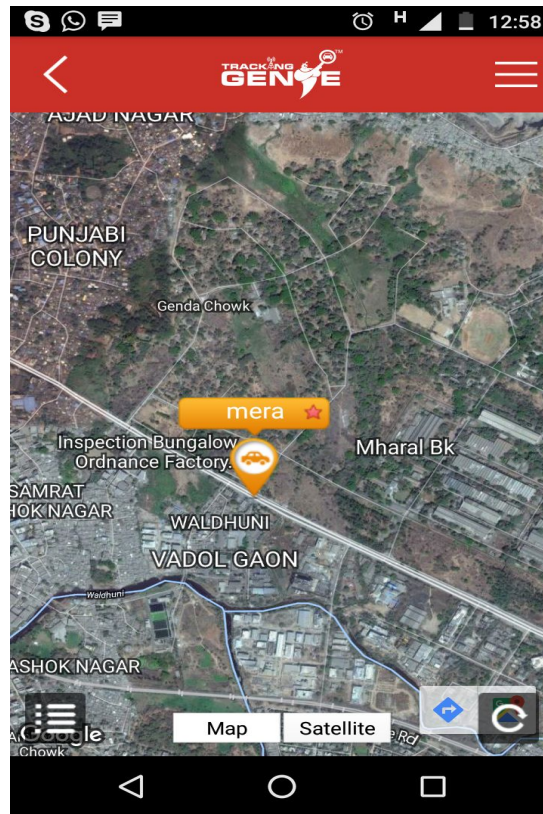
- When you close the menu you'll see the list as shown in slide 82.
- You can see details related to a particular device.
- By clicking on the checkbox the **menu icon** on top right corner will be changed with **Show** link.
- Please refer the image.





## Contd... Mobile Apps

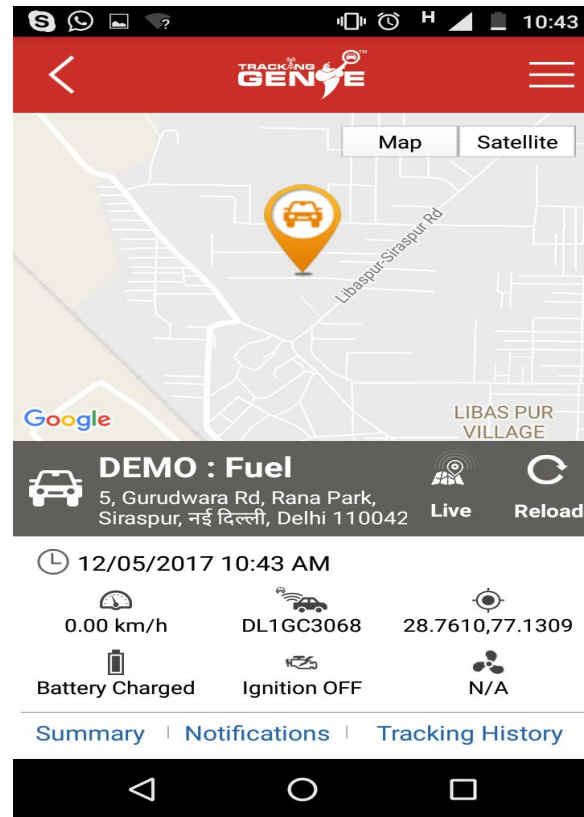
- When you click on the **Show** button. An icon is placed on the MAP with the location of device.
- You can change the view to any of these two options:
  - Map
  - Satellite
- When you click on satellite view, the map will change as shown in the image.





## Contd... Mobile Apps

- When you click on MAP annotation.
- A detailed page related to that device with map View and other details will open.
- Other details are as follows:
  - Summary
  - Notifications
  - Tracking History





## Contd... Mobile Apps

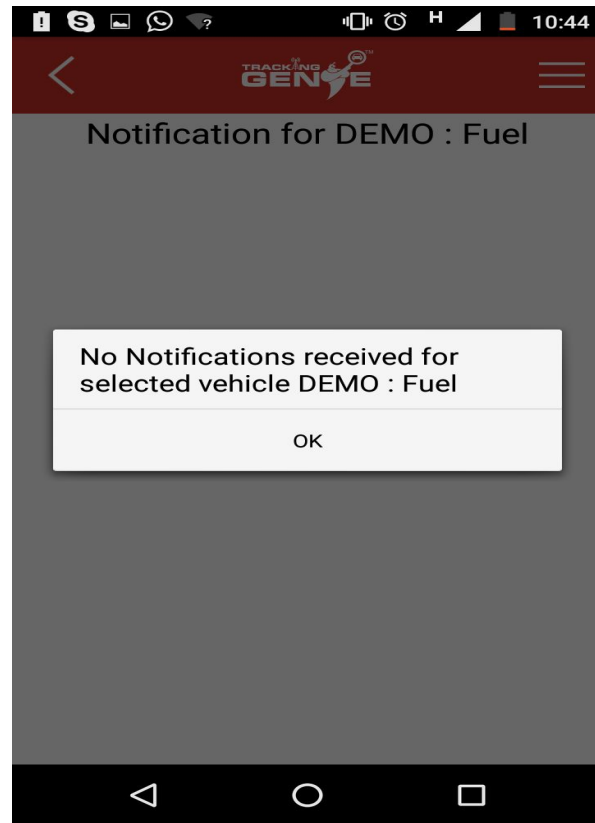
- When you click on **Summary** link at bottom of the screen as shown in the previous slide following screen will open.





## Contd... Mobile Apps

- When you click on **Notifications** link there can be two situations as follow:
  - There will be no notification
  - There will be a list of notifications
- Screen with no notification for that particular device is shown on this slide.
- Screen with notifications for that particular device is shown on next slide.

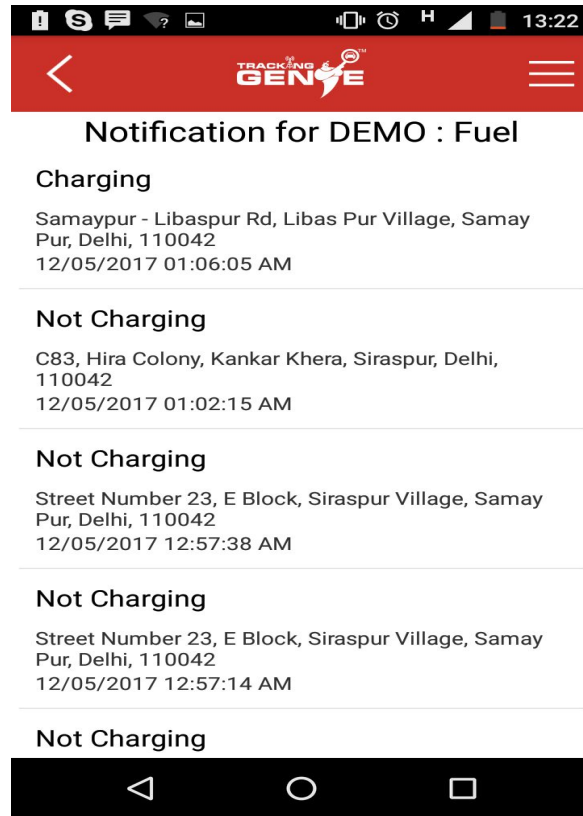






## Contd... Mobile Apps

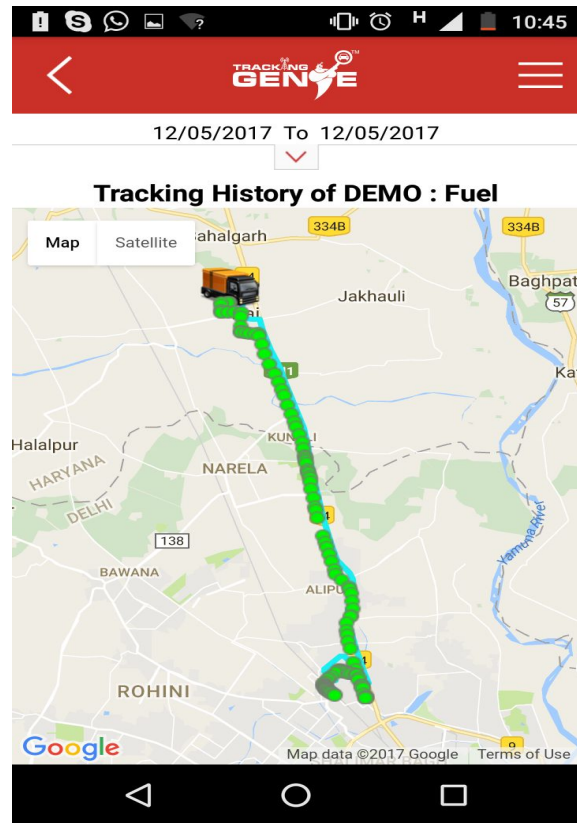
- A history of notifications can be kept in a list view.
- All the details related to that device notifications are shown as you can see in the screen.





## Contd... Mobile Apps

- When you click on **Tracking History** link at bottom of the screen a Map with path is opened as shown in the image.
- You can select start date and end date in which you want to show the path travelled by that particular vehicle.





# Sales Pitch



# Sales Pitch

- Take the details of client like name, location, contact no. and mail Id.
- Introduce them about our company & USP's.
- Ask in which vehicle they want to install the device? Is it personal or commercial one?
- Ask about the requirements what solution client is looking for?
- As per the requirements suggest the client with best suited device and give them a brief about the features and reports.
- If the client asks us about the functionality of our GPS device then we explain it's working.
- If it's a corporate client give examples of our big clients whom we are serving from long.



## Contd... Sales Pitch

- If the client is an individual, ask about the specification of his/her vehicle, it helps in suggesting them the best device.
- If the client is asking for a dealership then ask him to share his company profile, if any, with us and brief him about all the devices as well as our company profile and about the terms & conditions of becoming a dealer.
- If the client asks about fuel device then suggest him TG Super with fuel sensor. Tell the client about the device's working and the accuracy it gives.
- At last we mail the demo credential and our official brochure which has the details of our products, companies and clienteles with the best rates.

# Sales Pitch based on Industry: Examples

# Logistics/Cab Services

- **ROI-**By installing Tracking Genie, customer will immediately get ROI just in Two months, below are the some points.
  - **Over Speed Alert-**You can monitor 24\*7 at your vehicle speed by using Tracking Genie, You will get alerts on your mobile if vehicle is over speeding & this increases the fuel average of the vehicle.
  - **Better Average-**Both these points are proportionate with the above point, just by using over speed alert, you can increase the life of the vehicle & can cut the cost on fuel consumption.
  - **Vehicle Maintenance-**The useful tool given to users in which they can add the maintenance schedule for the vehicles (like: oil change, servicing etc)Once you add this information you will start getting notification by SMS /email for the respective dates .Tracking Genie provides the facility to clients in regard to maintain the vehicle service reminders.

## Other Important Features

- **Driver's Behavior**- By Using this feature available in our Tracking genie Software you can monitor the way how the driver runs your vehicle. You can prevent any unnecessary Halt, Sudden Acceleration, Harsh Breaking, and Ignition.
- **Timely Delivery**-In the logistics business, it is very important to deliver the product on time to their customers. By using Tracking Genie, you can monitor your drivers whether they are using the right way to reach their destinations or not or by tracking you can stop unwanted halts of the drivers.



## Contd... Other Important Features

- **Fuel Theft**-Fuel plays a major role for fleet owners and its cost can be controlled only by the fuel monitoring with accurate results. TrackingGenie has a feature by which user can get the fuel consumption, filling with analytical graphical view.
- **Vehicle Theft**- Tracking genie has special feature which is useful in your vehicle safety by simply sending message through your registered mobile number you can make your vehicle START/STOP.

Thank You