**Auto Trading CRM**

**Background**

We have been developing a Product **Auto trading CRM** , it has multiple module some modules are already developed and some are not developed still but here I want to share you brief description about Auto Trading CRM is that customer comes on auto trading via public domain website and fill out signup form, then that customer information becomes a lead and it is assigned to sales agent after that sales agent contact him through provided information, take their information about requirement and budget etc. he try to convert lead to a customer. In the mean while sales agent marked their communication with customer on CRM, let’s assume that customer want to buy a car and sales agent will be able to place a vehicle order request in CRM, here two option is available for fulfilled the vehicle purchase requirement through system, first one is through from stock inventory system and second from auction bidding system. after submitting a vehicle order request in CRM. Order is proceeding to further step according to defined steps in CRM. we have to followed the workflow process.

**Requirement**

The purpose of this document is that developed the pending module of Auto Trading CRM, here we consider three major modules for development are inventory, shipment and communication. All these pending module will be link with existing module and work perfectly as a complete product, current product is developed on ASP.NET MVC 4 C# with SQL SERVER database and some client side JavaScript scripting is used. Specially I want to mentioned here that there will be integration level development code is also required for example existing role base access functionality should incorporated with system as it same other module work with these type of integrations. there is mandatory requirement of separate stock inventory and management linked with CRM, these modules need to develop and integrate with Auto trading CRM and tried write code in a generic way. if someone has already developed these type of product/application would be appreciating their input before development of Auto trading CRM.

**Inventory management module.**

Sales agent will be able add a new inventory (vehicle unit) in system through add inventory screen, there is another screen in which sales team will be able to see the whole inventory view and view detail screen with preview mode, beside this screen there is also a listing Page required for inventory with almost all mandatory filter will be required there so we will be able to track any vehicle information through the screens, there are two way for registering product in system first one ordinary add inventory in system and the second one is that vehicle is added via bidding system, you may ask what is bidding system ? answer is that vehicle is getting from online auction bidding system and successfully won vehicle add from auction bidding system it will be reflect in inventory system with initial detail. Add inventory page consists of multiple step details are mentioned under the below captions. You can say that we split add inventory into multiple steps which are,

**Add Inventory (add vehicle):**

**Vehicle information**

In this tab sales agent would add/update and delete vehicle information also mentioned in provided screen shot if you know any current popular website it must has multiple attribute/characteristic are mentioned against on each vehicle as mandatory field It would be change but there is very least chance for this change. Also required history or logging of primary information.

Vehicle attributes are

:ChassisNo,Make,Model,Mileage,ModelCode,Streering,EngineSize,ExtColor,Location,Fuel,Version/Class,Seats,Drive,Door,Transmissions,MeterCube,ModelYear,RegistrationYearMonth,Dimensions,ManufacturerYearMonth,Weight,MaxCap,Transmission,Drive,Door,BodyType,Lotno,AuctionHouse,FOB,Freight,Insurance,Inspection,CNF,

**FEATURES**

Each vehicle has may be has unquie feature but here we define some most common feature tagging again each vehicle, it must be dynamic we must be able to add/remove any feature from the list required screen in admin panel.

CD PLAYER,POWER STEERING,AIRBAG,TV,REAR SPOILER,WHEEL SPANNER,KEYLESS ENTRY,SUN ROOF,POWER WINDOW,RADIO,POWER SEAT,CENTRAL LOCKING,FOG LIGHTS,ESC,LEATHER SEAT,A/C,CD CHANGER,BACK TIRE,JACK,BACK CAMERA,360 DEGREE CAMERA,ALLOY WHEELS,ABS,DVD,GRILL GUARD,SPARE TIRE,PUSH START,

**Vehicle Images**

In this tab sales agent will be able to add vehicle image through this screen, and background code must have functionality of resize vehicle images, with allowed image extension type and size. according to requirement, but initially we want to define image quality above average with moderate sizeall imagemust be save in physical application define directory also save image file name with relative path in database able relocate all image to another path or directory.

**Vehicle Document**

In this tab we add/update/delete vehicle related docuements which of them are mentioned below.

AuctionSheet,Export Certificate, Translated AuctionSheet, InspectionCertificate etc.

**Auction House information**

In this tab we define the vehicle information related to vehicle from actual received from which auction house. Following are the field need to add/update/delete in this page.

Auction House, Lot Number, Chassis Number, BuyingPrice, BuyingDate, VendorName,HandlingCharges,Fuel,YardLocation,ExpectedProfit.

**Payment Plan**

In this tab we show that how much amount need to pay for the vehicle on what chosen payment plan, how much amount is remaining that need to be recover from customer with dates.

**Reserved For**

In this tab as you understand from the name of caption Reserved for mean that selected vehicle is reserved for particular customer, country, order number, destination port, chassis number

**Shipment**

In this tab we declare initial shipment detail there is must be add/update/delete option is required also.

vessel name, voyage number, chassis id, bl number, eta,etd,shipping status, shipment type, freight type,bookingid etc

**Reports/Dashboard Stats**

Definitely if we add record in system, it must require reports and stats in the form of report.

**Shipment Management**

The concept of this module is that we can track shipment process of vehicle from yard to customer’s port through system lets assume that we hundreds of vehicle need to track and delivered to on customer’ port, this module will be enable for only for those vehicles which are won and received vehicle at our yard from auction house., Sales agent will be able add a new inventory through system then he will be able to add shipmentorder in system.

**Add Order Shipment:**

In this screen user will add shipment order if customer pay required deposit for shipment process.

For placing Shipment order has some mandatory requirement is that notifier and consignee address will be mandatory for shipment booking with verified status. Customer and vehicle information is also required for this process. Let’s assume that we create a shipment order with following field may be required some fields advancements in add shipment order.also shipment order history/logging is required

Chassis Number, CustomerID, CustomerName, Email address, notifier and consignee address,destination port and destination, country, ETA, ETD, BLNumber,VesselName,VoyageNumber, ShipmentType ,ShipmentStatus, shipment booking unique id for tracking individual shipment order with status in CRM.

**Updation of shipment order:**

User can add and remove multiple document again each shipment order, also able to change shipment status if current user role is administrator.

**Shipment Order Listing:**

The idea of this page is that shows, track and maintain list of shipment orders with their statuses with separate page for sales agent access with assign role based.

**Shipment Order Dashboard status wise/Report:**

Definitely if we add record in system, it must require reports and stats in the form of report.

**Communication System**

The concept of this module is that link CRM Communication with existing module external mediums like Email, WhatsAppand Cisco IP phone integration work with CRM, integration, listing and view track detail of particular communication easily accessible through system. and history of communication must be available for administration level in CRM, system support to configure html template which will used in email communication.

**Communication Report:**

Definitely if we add record in system, it must require reports and stats in the form of report.