Imagefootage Flow chart

## BLUE COLOR comments related to WEBSITE has to be done

## RED COLOR comments related to CRM has to be done

CLIENTS

Terms:

**Client** is customer who is purchasing

**User** is staff who is accessing CRM

**Admin** is staff who is the super admin

Client Registers------client Info flows to CRM along with USERID

Client selects images adds to the cart---------Info flows to CRM

## WEBSITE: Need to work website to capture cart data and to allow clients add to cart only after login?

In case of RM images --------Details of Lisence also flows to CRM ( calculation of RM image will be done at Website) However for offline Invoice Generation also this calculators need to be integrated in CRM.

## What is meaning of RM images? Where in database we can find license details?

After Checkout and Payment,

automated Invoice has to be generated by CRM, ## will this done by cron?

1. an automated mail has to be sent to client
2. Under the Client userid---Invoices—the Invoice PDF copy has to stored—option to update PO number MANUALLY by USER at a later date has to there.

In Client Invoices/purchase History page in CRM, User can select a time frame and see all the Images along with the image nos that the client has purchased. The feature should be available on the website under Client’s account information, Download history.

## will crm users do add to cart from frontend WEBSITE or from CRM ADMIN? Also will crm users can add product from crm?

1. Manual Invoice creation by user has to be there in CRM where all offline clients will purchase through calling our office. Once the images are added to clients’ Invoice and approved, the same should be available in Clients’ account for download.
2. While creating Manual Invoices, following step has to be followed; CREATE INVOICE---SUBMIT---Performa Invoice /Quotation is created( *automated serial no. diff from Invoice no.*)---- and sent to client on email -----if client approves Quote on email----User manually changes the status to Pending for payment----Invoice is created-----Once payment is received----status changed to closed.
3. After purchase, sometime client come requesting for cancelling the Invoice partially or Fully, this needs to be done in CRM for both online and offline clients… So in Point 5 we would need 3 final option—Pending payment—Edit( for partial cancellation)—Cancel (for Full cancellation)- Closed for payments received. In this when you select Edit, it would take it back to Invoice creation where all the details of the Invoice would be available, so user has to modify or delete images and then again SUBMIT—PENDING PAYMENT.

In CRM I had also requested for an option of uploading a very minute size of Images while creating Invoice and mentioning the Image IDs manually these are images/footages that doesnot belong to the website imagefootage.com. Once the Quote is create it will follow the same process as above.

## can these images add to cart along with front end listed images or they will be invoiced separately?

So as per the Above, following report should be generated in CRM;

1. Client registered today—the page will also show option to select a period, for eg 1/03/2017-31/03/2017, in which all clients registered during this period will show up.
2. Sales report- Complete report- online sales report- Offline sales report- date options
3. Abandoned Cart List
4. Pending Payment clients( refer point 5 above)
5. Checkout Failure list
6. Subscription Expiry list- will show first client’s whose subscription is due to expire in 7 days- 0 days. Should have option to choose to see only expired subscription also.
7. Performa list- client whose sales are open( clients who have not approved Quotes)
8. Cancelled transaction list
9. Registered but not purchased list

Potential Client

Add

Search

Once a Potential Client finally plans to purchase, USER can create an account in CRM or Client can register on the website and then User can link the userid in the CRM to the potential client, by searching for the userid or the email address.

In Client Information

User should be able to create a link to set password and send to client automatically from CRM

User Can change client’s email id

One client Information box, where client’s addition information like, Company Name, Mobile Number address can be saved.

DOWNLOAD on behalf of Customer.

Here USER will input Client’s Userid and Image ID as per the website and download on behalf of client and send the image to client manually through email.

MEMBER SEARCH

NOTE: RF images License never expire, RM does.

**Contributor**

Contributor Registers---------Contributor info flows to CRM along with USERID

Contributor Uploads Govt Registered ID proof and Bank details also fills in the form with details—Info flow to CRM

Contributor Uploads Images/footages on website under category like **RM, RF- Premium RF/ Budget RF**, It goes through the Quality Check filter, Once approved—moves for color correction check, once approved----moves to `keywording Check------ Final Quality Check and then Authorised and gets uploaded to website with Uniques Image no. under category like **RM, RF- Premium RF/ Budget RF**

Image No Info flows to CRM under the Contributor ID.

Whenever some image gets sold then the commission percentage of 40% of per image cost gets credited to the contributor’s account in CRM.

Under Contributor’s account the chart should show product classification under which the download has happened and hence the cost.

For e.g For single image download, the cost may be Rs 5000 for the Image, Same image may get downloaded under a Subscription plan where the per image cost might be just Rs 500/- so he get 40% on the sale amount cost.

There are separate set of agreements for uploading RF, RM Images.

Details that need to be captured in CRM

1. Contributor Complete Info Including Bank details
2. User can change Contributor’s details upon request manually from back end, or they can do so in their account on the website. In both cases the info should flow vise-versa
3. List of downloads in a time period and earnings
4. Payment made to the contributor by accounts team needs to get updated in CRM and detailed info should flow back to contributor account on website
5. Expired ID proof list
6. Payment rejected list
7. New registration list

##From where we can manage Packages and Packages Subscription?

##Where is contributor database?