Aquapurite ERP - Service & CRM User Guide

For Service Manager, CRM Team & Customer Support

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Table of Contents

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1. Overview

What This Guide Covers

Module	Purpose
CRM	Customer management, leads, 360° view, call center
Service	Service requests, installations, warranty, AMC, technicians

Setup Sequence

Before using these modules, ensure:

```
1. Products created (Catalog)
      ↓
2. Customers created (CRM)
      ↓
3. Technicians added (Service → Technicians)
      ↓
4. Service areas defined
      ↓
Ready for Service & CRM operations
```

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2. CRM Module

2.1 Customer Management

Navigation: CRM → Customers

Customer Types

Type	Description	Example
B2C	Individual consumers	Home buyers

B2B	Business customers	Hotels, Offices
Dealer	Resellers	Distribution partners
Franchise	Franchise partners	Service franchisees

Creating a Customer

1. Go to **CRM → Customers**
2. Click **+ New Customer**
3. Fill in details:

Basic Information:

Field	Required	Description
Name	Yes	Full name or company name
Email	Yes*	Primary email (*or phone required)
Phone	Yes*	Primary contact number
Customer Type	Yes	B2C, B2B, Dealer, Franchise

Address:

Field	Required	Description
Address Line 1	Yes	Street address
Address Line 2	No	Apartment, floor, etc.
City	Yes	City name
State	Yes	State (for GST)
Pincode	Yes	6-digit PIN code

GST Details (for B2B):

Field	Required	Description
GSTIN	For B2B	15-character GST number
PAN	Optional	10-character PAN

Credit Settings:

Field	Description
Credit Limit	Maximum outstanding allowed
Payment Terms	Net 15, Net 30, etc.

4. Click **Save**

Editing a Customer

1. Go to **CRM → Customers**
2. Find customer in list (use search)
3. Click on customer row or **Edit** button
4. Update fields
5. Click **Save**

Customer Status

Status	Meaning
Active	Can place orders, receive service
Inactive	Temporarily disabled
Blocked	Credit issues, cannot transact
Prospect	Potential customer (from leads)

2.2 Customer 360° View

Navigation: CRM → Customer 360

A complete view of customer history and interactions.

What You Can See

Section	Information
Profile	Contact details, addresses
Orders	All orders placed
Invoices	All invoices generated
Payments	Payment history
Service History	All service requests
Products Owned	Installed products with serial numbers
AMC Status	Active contracts
Warranty Status	Warranty expiry dates
Communication Log	Calls, emails, notes

How to Use

1. Go to **CRM → Customer 360**
2. Search for customer by:
   - Name
   - Phone number
   - Email
   - Customer ID
3. View complete history

4. Take actions:
    - Create new order
    - Raise service request
    - Add note
    - Schedule callback

2.3 Lead Management

Navigation: CRM → Leads

Lead Sources

Source	Description
Website	Online inquiry form
Phone	Inbound calls
Referral	Customer referrals
Walk-in	Showroom visitors
Campaign	Marketing campaigns
Social Media	Facebook, Instagram inquiries
Just Dial	JustDial leads
IndiaMART	IndiaMART inquiries

Creating a Lead

1. Go to **CRM → Leads**
2. Click **+ New Lead**
3. Enter:
    - Name
    - Phone
    - Email (optional)
    - Source
    - Product Interest
    - Notes
4. Assign to sales person
5. Click **Save**

Lead Stages

```
NEW → CONTACTED → QUALIFIED → PROPOSAL → NEGOTIATION → WON/LOST
```

Stage	Action Required
New	First contact within 24 hours
Contacted	Initial call made, gather requirements

Qualified	Budget confirmed, decision timeline known
Proposal	Quotation sent
Negotiation	Price/terms discussion
Won	Convert to customer & order
Lost	Record reason, close lead

Converting Lead to Customer

1. Open lead in **Won** stage
2. Click **Convert to Customer**
3. System creates customer record
4. Lead is marked as converted

2.4 Call Center

Navigation: CRM → Call Center

For managing inbound and outbound calls.

Logging a Call

1. Go to **CRM → Call Center**
2. Click **+ Log Call**
3. Enter:
    - Customer (search by phone/name)
    - Call Type (Inbound/Outbound)
    - Purpose (Inquiry, Complaint, Follow-up, etc.)
    - Notes
    - Next Action
    - Follow-up Date
4. Click **Save**

Call Types

Type	Purpose
Inquiry	Product/price questions
Complaint	Service issues
Follow-up	Post-sale check
Feedback	Customer satisfaction
Collection	Payment reminder
Scheduling	Installation/service scheduling

Call Disposition

Disposition	Meaning

Answered	Call connected
No Answer	Customer didn't pick up
Busy	Line busy
Callback Requested	Customer asked to call later
Wrong Number	Invalid number
DND	Do Not Disturb

2.5 Escalations

Navigation: CRM → Escalations

For tracking and resolving escalated issues.

Escalation Levels

Level	Handled By	SLA
L1	Customer Support	4 hours
L2	Team Lead	8 hours
L3	Manager	24 hours
L4	Head of Service	48 hours

Creating an Escalation

1. Go to **CRM → Escalations**
2. Click **+ New Escalation**
3. Enter:
    - Customer
    - Related Service Request (if any)
    - Issue Description
    - Priority (Low/Medium/High/Critical)
    - Escalation Level
4. Assign to handler
5. Click **Save**

Escalation Status

Status	Meaning
Open	Being worked on
Pending Customer	Awaiting customer response
Pending Internal	Awaiting internal action
Resolved	Issue fixed
Closed	Customer confirmed resolution

3. Service Module

3.1 Service Request Management

Navigation: Service → Service Requests

Service Request Types

Type	Description	SLA
Installation	New product installation	48 hours
Repair	Product not working	24 hours
Maintenance	Routine service/filter change	72 hours
Complaint	Quality/service issue	24 hours
AMC Visit	Scheduled AMC service	As per schedule
Warranty Claim	Warranty-covered repair	48 hours

Creating a Service Request

1. Go to **Service → Service Requests**
2. Click **+ New Request**
3. Enter:

Customer Details:

Field	Required	Description
Customer	Yes	Search by phone/name
Contact Person	No	If different from customer
Contact Phone	Yes	For technician coordination
Service Address	Yes	Where service is needed

Product Details:

Field	Required	Description
Product	Yes	Which product needs service
Serial Number	Recommended	For warranty verification
Purchase Date	If known	To check warranty

Request Details:

Field	Required	Description
Request Type	Yes	Installation, Repair, etc.

Priority	Yes	Low, Medium, High, Urgent
Problem Description	Yes	Detailed issue description
Preferred Date	No	Customer's preferred date
Preferred Time Slot	No	Morning/Afternoon/Evening

4. Click **Save**

Service Request Status Flow

```
NEW
  ↓
ASSIGNED (Technician assigned)
  ↓
SCHEDULED (Date/time confirmed)
  ↓
IN_PROGRESS (Technician on site)
  ↓
COMPLETED / PENDING_PARTS / ESCALATED
  ↓
CLOSED (Customer confirmed)
```

Assigning Technician

1. Open service request
2. Click **Assign Technician**
3. Select technician based on:
    - Availability
    - Location/pincode
    - Skill set
    - Current workload
4. Set scheduled date/time
5. Click **Assign**

3.2 Installations

Navigation: Service → Installations

Track new product installations.

Installation Workflow

```
Order Delivered
      ↓
Installation Request Created (Auto/Manual)
      ↓
Technician Assigned
      ↓
Installation Scheduled
      ↓
Technician Visits
```

```
      ↓
Installation Completed
      ↓
Customer Sign-off
      ↓
Warranty Activated
```

Creating Installation Request

Option 1: From Order

- When order is marked delivered, system can auto-create installation request

Option 2: Manual

1. Go to **Service → Installations**
2. Click **+ New Installation**
3. Select customer and product
4. Enter delivery date
5. Assign technician
6. Save

Installation Checklist

Technician must complete:

- [ ] Product unpacked and inspected
- [ ] Site survey done
- [ ] Installation location confirmed
- [ ] Water source checked
- [ ] Drain outlet available
- [ ] Electrical point available
- [ ] Installation completed
- [ ] Product tested
- [ ] Customer trained on usage
- [ ] Customer signed installation report
- [ ] Before/After photos uploaded

Completing Installation

1. Technician opens installation in mobile app
2. Completes checklist
3. Enters:
    - Serial number (scan barcode)
    - Installation date/time
    - Photos
    - Customer signature
4. Submits completion
5. System activates warranty

3.3 Warranty Management

Navigation: Service → Warranty Claims

Warranty Types

Type	Duration	Coverage
Standard	1 year	Manufacturing defects
Extended	2-5 years	Manufacturing defects
AMC	1 year	All parts + service
Comprehensive	1-3 years	Parts + labor + consumables

Checking Warranty Status

1. Go to **Service → Service Requests**
2. Enter product serial number
3. System shows:
    - Purchase date
    - Warranty type
    - Expiry date
    - Coverage details
    - Claim history

Creating Warranty Claim

1. Go to **Service → Warranty Claims**
2. Click **+ New Claim**
3. Enter:
    - Customer
    - Product Serial Number
    - Problem Description
    - Defect Type
4. System validates warranty
5. If valid, claim is created
6. Assign technician for inspection

Warranty Claim Status

Status	Meaning
Submitted	Claim received
Under Review	Being evaluated
Approved	Claim accepted
Rejected	Not covered (reason given)
Parts Ordered	Replacement parts ordered
In Progress	Repair/replacement ongoing
Completed	Claim resolved

Claim Rejection Reasons

Reason	Description
Out of Warranty	Warranty period expired
Physical Damage	Customer-caused damage
Unauthorized Repair	Third-party tampering
Consumable	Item not covered (e.g., filters)
Misuse	Product used incorrectly

3.4 AMC (Annual Maintenance Contracts)

Navigation: Service → AMC Contracts

AMC Types

Type	Includes	Price Range
Basic	2 services/year	₹1,500 - 2,500
Standard	4 services + parts discount	₹3,000 - 4,500
Premium	Unlimited services + free parts	₹5,000 - 8,000
Comprehensive	All inclusive + priority	₹8,000 - 12,000

Creating AMC Contract

1. Go to **Service → AMC**
2. Click **+ New AMC**
3. Enter:
    - Customer
    - Product(s) covered
    - AMC Type
    - Start Date
    - Duration (1/2/3 years)
    - Amount
    - Payment received (Yes/No)
4. Click **Save**

AMC Renewal Workflow

```
30 days before expiry → System sends renewal reminder
      ↓
Customer contacted by CRM
      ↓
If renewed → New AMC created, linked to previous
      ↓
If not renewed → Mark as expired
```

Scheduled AMC Visits

System auto-generates service visits based on AMC terms:

AMC Type	Visits/Year	Schedule
Basic	2	Every 6 months
Standard	4	Every 3 months
Premium	As needed	On request

3.5 Technician Management

Navigation: Service → Technicians

Adding a Technician

1. Go to **Service → Technicians**
2. Click **+ Add Technician**
3. Enter:
    - Name
    - Phone
    - Email
    - Employee ID (if internal)
    - Technician Type (Internal/Franchisee/Contract)
    - Skills (Installation, Repair, etc.)
    - Service Areas (Pincodes)
4. Click **Save**

Technician Types

Type	Description
Internal	Company employee
Franchisee	Franchise partner technician
Contract	Third-party contractor

Technician Skills

Skill	Jobs Assigned
Installation	New installations
Repair - Basic	Simple repairs
Repair - Advanced	Complex repairs
Electrical	Electrical issues
Plumbing	Water connection issues
RO Specialist	RO system expert

Viewing Technician Schedule

1. Go to **Service → Technicians**
2. Click on technician name
3. View calendar showing:
    - Assigned jobs
    - Completed jobs
    - Available slots

Technician Performance Metrics

Metric	Target
Jobs Completed/Day	4-6
First-Time Fix Rate	>85%
Customer Rating	>4.0/5
On-Time Arrival	>90%
Average Job Duration	<2 hours

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4. Common Workflows

4.1 New Customer Onboarding

```
1. Customer inquiry (Phone/Website/Walk-in)
      ↓
2. Create Lead (CRM → Leads)
      ↓
3. Qualify lead (call, understand requirements)
      ↓
4. Send quotation
      ↓
5. Convert to Customer (CRM → Customers)
      ↓
6. Create Order
      ↓
7. Delivery
      ↓
8. Installation (Service → Installations)
      ↓
9. Post-installation call (CRM → Call Center)
      ↓
10. Offer AMC (Service → AMC)
```

4.2 Service Request Resolution

```
1. Customer calls with issue
      ↓
2. Log call (CRM → Call Center)
      ↓
3. Create Service Request (Service → Service Requests)
```

```
       ↓
4. Check warranty status
       ↓
5. Assign technician
       ↓
6. Schedule visit
       ↓
7. Technician visits & resolves
       ↓
8. Close service request
       ↓
9. Collect feedback
       ↓
10. If issue persists → Escalate
```

4.3 AMC Service Visit

```
1. System generates scheduled visit
       ↓
2. Customer notified (SMS/Email)
       ↓
3. Technician assigned
       ↓
4. Technician visits
       ↓
5. Performs maintenance:
   - Filter check/replacement
   - Water quality test
   - General inspection
   - Cleaning
       ↓
6. Updates service record
       ↓
7. Customer signs off
       ↓
8. Next visit scheduled
```

4.4 Handling Customer Complaint

```
1. Complaint received (Call/Email/Social)
       ↓
2. Log in CRM → Call Center
       ↓
3. Create service request if technical issue
       ↓
4. If serious → Create Escalation
       ↓
5. Assign handler based on escalation level
       ↓
6. Investigate & resolve
       ↓
```

```
7. Communicate resolution to customer
      ↓
8. Get confirmation
      ↓
9. Close complaint
      ↓
10. Analyze root cause for improvement
```

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5. Reports & Analytics

5.1 CRM Reports

Report	Navigation	Purpose
Lead Conversion	CRM Reports	Track lead-to-customer rate
Customer Acquisition	CRM Reports	New customers by period
Customer Segmentation	CRM Reports	Customers by type/region
Call Analytics	CRM Reports	Call volume, disposition

5.2 Service Reports

Report	Navigation	Purpose
Service Summary	Service Reports	Requests by type/status
Technician Performance	Service Reports	Jobs, ratings, efficiency
SLA Compliance	Service Reports	On-time resolution rate
Warranty Claims	Service Reports	Claims analysis
AMC Status	Service Reports	Active, expiring, expired

5.3 Key Metrics to Monitor

Daily:

- New service requests
- Pending assignments
- Today's scheduled visits
- Overdue requests

Weekly:

- First-time fix rate
- Customer satisfaction score
- Technician utilization
- Escalation count

Monthly:

- Total installations

- AMC renewals
- Warranty claims
- Revenue from service

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6. Troubleshooting

Common Issues

Problem	Solution
Cannot find customer	Check phone number format, try alternate search
Serial number not found	Verify number, check if product registered
Cannot assign technician	Check technician is active and has matching skills
Warranty shows invalid	Verify installation date in system
AMC visits not generating	Check AMC is active and schedule is set

Error Messages

Error	Meaning	Action
"Customer not found"	No matching customer	Create customer first
"Product not registered"	Serial not in system	Register product
"No technicians available"	All technicians busy	Check schedules, add capacity
"Warranty expired"	Out of warranty period	Offer paid service or AMC
"Duplicate request"	Similar request exists	Check existing requests

Support Contacts

Issue Type	Contact
Technical/System	IT Support
Process/Training	Operations Manager
Customer Escalation	Service Head

Quick Reference Card

Daily Tasks - Service Coordinator

Time	Task	Navigation
9:00 AM	Check new requests	Service → Requests (filter: New)
9:30 AM	Assign technicians	Service → Requests → Assign

10:00 AM	Confirm today's schedule	Service → Calendar
2:00 PM	Follow up on pending	Service → Requests (filter: Pending)
4:00 PM	Check completed jobs	Service → Requests (filter: Completed)
5:00 PM	Close resolved requests	Service → Requests → Close

Daily Tasks - CRM Executive

Time	Task	Navigation
9:00 AM	Check new leads	CRM → Leads (filter: New)
10:00 AM	Follow-up calls	CRM → Call Center
12:00 PM	Update lead status	CRM → Leads
2:00 PM	Customer callbacks	CRM → Call Center
4:00 PM	Log all calls	CRM → Call Center
5:00 PM	Plan tomorrow's calls	CRM → Tasks

Document prepared for Aquapurite ERP v1.0