

RELISYS

# Customer Relationship Management

Manage Relationship with Existing and Potential Customers

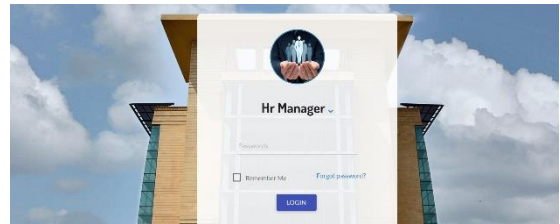


## Table of Contents

1) Why to Choose RELISYS CRM? .....	2
a) Automate your workflows .....	2
b) Data driven decision making.....	2
c) Covering complete customer cycle.....	2
d) Revenue In Pipeline.....	2
e) Web based application .....	2
f) Mobile App:.....	2
2) Functions:.....	3
3) Manage Lead.....	4
a) Create New Lead .....	4
b) Central Entity Repository: .....	4
c) Search Existing Leads / Entities.....	4
d) Support Customer Registration Desk:.....	4
e) Configurable Approval Workflow .....	4
4) Sales Team Management.....	5
a) User Management: .....	5
b) Define KPI's .....	5
c) Real Time KPI's Monitoring.....	5
5) Lead Conversion Lifecycle .....	6
a) Lead Association .....	6
b) Activity Planning.....	6
c) Due Diligence .....	8
d) Credit Control.....	8
e) Customer Consolidated View.....	8
f) Add Inquiry.....	10
g) Add Quotation.....	11
6) Dashboard .....	12
7) CRM Flow .....	13

## 1) Why to Choose RELISYS CRM?

RELISYS CRM allows business to manage relationship with the customers and potential customers effectively. It gives more visibility in the sales process and equips sale team to perform routine duties effortlessly.



### a) Automate your workflows

RELISYS CRM allows to automate current workflow of lead association. Which gives sales team more time for productive tasks, and they will be able to close more sales effectively.

### b) Data driven decision making

RELISYS CRM allows you to make data driven decisions which can shape your organization future. It allows to find the elements which are directly associated with sales. And focusing on these elements, allows business to achieve sales targets easily and save precious resources.

### c) Covering complete customer cycle

RELISYS CRM covers complete sales funnel. You can define different stages of conversion as per your business requirements, e.g. Lead, Opportunity, Qualified Opportunity, and Customer.

### d) Revenue in Pipeline

RELISYS CRM allows you to define potential revenue against each lead. And you will be able to see the estimated revenue in each sales funnel stage. Which will be helpful in making decision regarding revenue forecast.

### e) Web based application

RELISYS CRM Module is web-based application, which can be accessed easily from anywhere. You just need a stable internet connection and browser to access your login with all configured authorities.

### f) Mobile App:

RELISYS CRM mobile app enables sales team to plan activities easily. RELISYS mobile app is readily available on Google play store.

## 2) Functions:

1. Configurable Approval Workflow
  - 1.1. Setting up KPI's for Sales team
  - 1.2. Associating Customers
  - 1.3. Due Diligence
2. Customer Management
  - 2.1. Lead Registration
  - 2.2. Lead conversion cycle
  - 2.3. Sales Funnel
  - 2.4.
3. KPI's
  - 3.1. Defining Sales Team KPI's
  - 3.2. Real time KPI's monitoring
4. Due Diligence
  - 4.1. Customizable Due Diligence parameters
  - 4.2. System notifications for Due Diligence
5. Quotations
  - 5.1. Multiple quotation templates supported
  - 5.2. Support financial module integration
  - 5.3. Estimated Gross Profit
6. Integration with Operations module
7. Geo tagging
8. Dashboard and Reporting

For lead registration, you can define a customized approval workflow. RELISYS CRM will follow the configured workflow and route the lead registration request accordingly. It maintains complete history of approval workflow as well.

Approving authority can return the workflow with relevant comments, which will be the part of workflow history.

## 4) Sales Team Management

### a) User Management:

RELISYS CRM allows to create separate roles for the sales team covering Sales Representative, Manager, and HOD. These roles will be able to view the data according to the set hierarchy.

### b) Define KPI's

RELISYS CRM allows to define division wise KPI's for the sales team members. We can cover the following elements here:

- i. No. of Calls / meetings per day
- ii. No. of Visits
- iii. No. of Quotation
- iv. Gross Profit Targets

### c) Real Time KPI's Monitoring

RELISYS CRM allows to monitor set KPI's for the sales team on real time basis. Reporting authorities can view the progress from there dashboard.

## 5) Lead Conversion Lifecycle

RELISYS CRM allows to configure lead / customer conversion lifecycle as per business requirements. We can attach certain events, based upon which system automatically changes the stage of lead.

### a) Lead Association

Once lead is approved and available in system, sales person can request association of that lead by providing information e.g. potential gross profit and target gross profit.

Once association request is submitted sales manager can approve or decline the association request. This step allows sales manager to allow association of lead with most relevant sales person.

The screenshot shows the 'Add/Edit Associate Customer' form. It contains several fields for customer and lead information:

- Customer Name: 'AECO EXPORT COMPANY'
- \*Customer Division: 'Main Division' (dropdown)
- Division: (dropdown)
- \*Sales Person: (dropdown)
- \*Source of Lead: '--Select One--' (dropdown)
- Yearly Potential Volume: 'Potential Volume' (text input), Volume Unit: '--Select One--' (dropdown)
- G.P Per Unit: 'Enter G.P Per Unit' (text input)
- Potential GP: (text input)
- \*Key Contact: '--Select One--' (dropdown)
- \*Product: '--Select One--' (dropdown)
- Target Volume: 'Enter Target Volume' (text input), Volume Unit: '--Select One--' (dropdown)
- Currency: 'United States of America, Dollars' (dropdown)
- Target GP: (text input)
- Key Contact for CCU: '--Select One--' (dropdown)

Buttons at the bottom: 'Save', 'Clear', 'Cancel'.

### b) Activity Planning

Once customer is associated, relevant sales person can plan the activities with lead. Calendar has been provided on the dashboard, which allows to plan activities easily.

The screenshot shows the 'Call/Meeting Activity' calendar for June 2022. The calendar is a grid with days of the week (Sun to Sat) and dates. A legend on the left indicates activity types: Call (green square), Meeting (blue square), Daily Obj (purple square), Pending (orange circle), Approved (thumbs up icon), Rejected (thumbs down icon), and Delete (X icon). The calendar shows dates from 1 to 30, with a red circle around the number 7 on Tuesday.

Click on relevant date on which you want to plan activity (Call or meeting). System will ask for the further information

Add Call/Meeting Activity

Activity
Document
Location
Feedback

\*Customer
search a Customer in the list...

\*Activity type
Call

\*Date from
08/06/2022

\*Start Time

Time Zone
Asia/Karachi

Product

Air Freight
Air
Customs
Warehouse
Rail
Transport
Sea

\*Priority
☒ High
☐ Low
☐ Moderate

\*Agenda
--Select One--

\*Date to
08/06/2022

\*End Time

Notifications
☐ Email
☐ Popup

Save
Clear
Cancel

And record will be saved:

JUNE 2022						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
<div> <div> <div>Call</div> <div>Meeting</div> <div>Daily Obj</div> <div>Pending</div> </div> <div> <div>Approved</div> <div>Rejected</div> <div>Delete</div> </div> </div> 5	30	31	1	2	3	4
6	7	8	9	10	11	12
12	13	14	<div> 9:45a ABC ACCESS </div> 15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

Calendar allows the sales person to plan the day accordingly.



### c) Due Diligence

RELISYS CRM allows to take approval from due diligence or security department before proceeding with a lead. You can define different parameters on which system will take approval from nominated or authorized personnel and after approval sales person will be informed accordingly.

### d) Credit Control

RELISYS CRM allows you to set limit for credit for the leads / customers. Sales person can request Credit Limit from login after providing values for Credit Days and Credit Limit. This request will follow the set approving hierarchy and after approval sales person will be notified and approved limit will be available to view from his login:

Customer Info

Customer Info

Call/Meeting

Inquiry

Contract

Associate Customer

CCU

SNS

Customer Division: Sea Export

Requested				Recommended		Approved	
* Currency	* Credit Days	* Credit Limit	Expiry Date	Credit Days	Credit Limit	Credit Days	Credit Limit
<div></div>	<div></div>	Requested Credit Li	<div>dd/mm/yyyy</div>	-	-	-	-

Save

### e) Customer Consolidated View

RELISYS CRM allows to view all the relevant information regarding customer at single place. Sales person can perform all the required actions from a single interface:

Search required customer from listings:

Search Customer

Customer Name

NTN

Status

Country

City

Area

Search

Reset

Cancel

Customer Listing

CustomerID	Name	NTN	Actions
25996	FOODS PRIVATE LIMITED		

Click on the customer name and system will open consolidated view for customer:

Customer Info

Customer Info

Call/Meeting

Inquiry

Contract

Associate Customer

CCU

SNS

\* Company Type

--Select One--

Years in Business

--Select One--

Customer ID		Customer Name	FOODS PRIVATE LIMITED
NTN		URL	
STRN			
Description			
Customer Contact			+
Name	Designation	Contact #	
Customer Address			+
Address	Contact #	Email	
Customer Potential			+

#### f) Add Inquiry

RELISYS allows to configure multiple products in CRM, and user can define the different product wise requirements.

Sales person will select the inquiry against mentioned product.

**Customer Info**

Customer Info

Call/Meeting



**Inquiry**

Contract

Associate Customer

CCU

SNS

Customer Division	Action
Sea Export	
Main Division	

Customer

\* Rate Validity date08/07/2022

Cash based☐

Auto Bound☒

Customer DivisionSea Export

Shipper/Consignee/PartySearch Shipper

Air Freight ✕

Air Customs ✕

Transport ✕

\*Import / Export:☒ Export ☐ Import

Loading CountryPakistan

\* Loading Air PortAlamalqbalInternational

Expected Departuredd/mm/yyyy

\* Commodity--Select One--

\* Gross weight (Kg)Enter Gross Weight

**Air Freight**

Discharge Country--Select One--

\* Discharge Air PortSelect or search a Air Port in the list...

Expected Arrivald/mm/yyyy

\* Commodity Type--Select One--

Chargeable WeightChargeable Weight

### g) Add Quotation

Sales person can add quotation after selecting the relevant fields and providing buying and selling. After saving the quotation, RELISYS CRM allows to download PDF in multiple formats as per customer requirements.

Add/Edit Quotation

\* Currency
PKR Pakistan, Rupees

\* Validity date
08/07/2022

☐ Draft

Customer Division
Sea Export

FreightAir
Transport

Commodity
Air Conditioners
Loading Airport
AlamaIqbalInternational
Discharge Airport
Angads

*Airline	*Currency	*Buying Rate ( per KG)	* Selling Rate	* Exchange Rate	Quantity	Total	Add New
Select or search a Airline in the list...	PKR - Pakista	Buying Rate	Quote Rate	Exchange Rate	600.00		

Due Carrier

AirLine	* Charges type	* Charges basis	* Currency	* Buying Rate	* Selling Rate	* Exchange Rate	* Quantity	Total
---------	----------------	-----------------	------------	---------------	----------------	-----------------	------------	-------

Due Agent charges

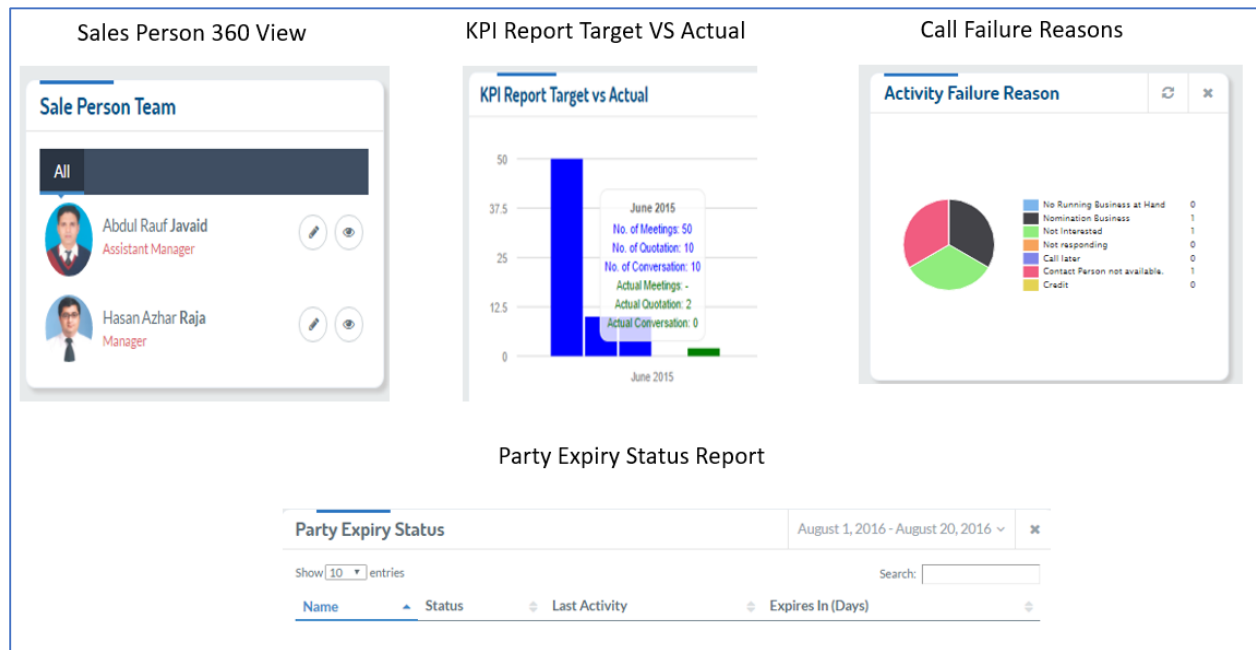
@ Actual	* Charges type	* Charges basis	* Currency	* Buying Rate	* Selling Rate	* Exchange Rate	Tax %	* Quantity	Total	Add Service Charges
----------	----------------	-----------------	------------	---------------	----------------	-----------------	-------	------------	-------	---------------------

Host Cancel

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## 6) Dashboard



## 7) CRM Flow

