User Manual (English)

The following are the various modules and domains offered by ERP+ from Technocom, covering a wide range of businesses. You can be a small distributor, a manufacturer, running an educational institute, or a healthcare organization. There is something for everyone.

Connect

info@technocom.me
+973 39 394939
www.erpplus.me
www.technocom.me

Document Version: 01.01.2019
Release Date: April 25, 2019

Module: CRM

Module: CRM

ERP+ helps you track business Opportunities from Leads and Customers, send them Quotations, and make confirmed Sales Orders.

The Customer Relationship Management (CRM) module helps maintain Leads, Opportunities, and Customers.

1. Topics

1.1 Basic setup

1. Campaign
2. Customer Group
3. Sales Person

1.2 Sales

1. Lead
2. Opportunity
3. Customer
4. Contact and Address

1.3 Reports

1. CRM Reports

1.4 Others

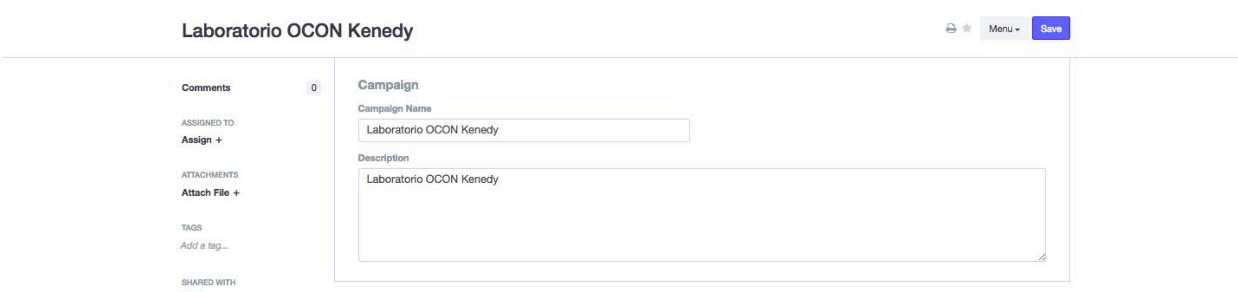
1. Newsletter

1.1 Topic: Basic Setup

1. Campaign
2. Customer Group
3. Sales Person

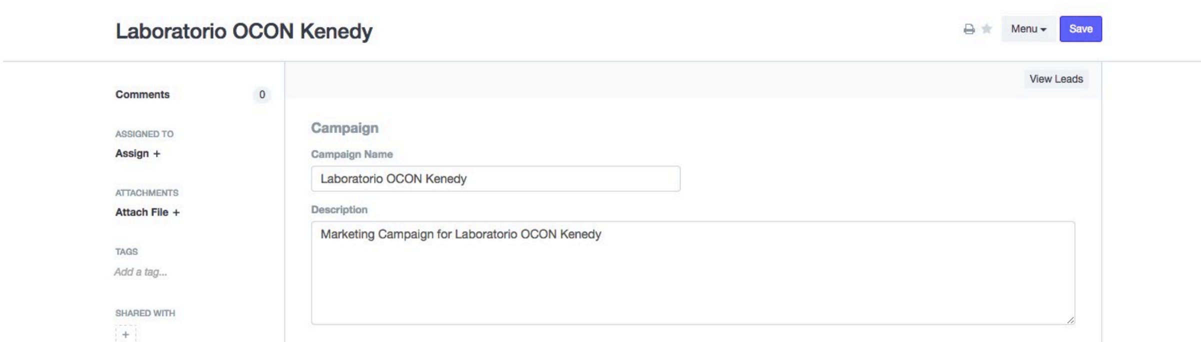
1. Campaign

A Campaign is a full-scale implementation of a sales strategy to promote a product or a service. This is done in a market segment of a particular geographical area, to achieve specified objectives.

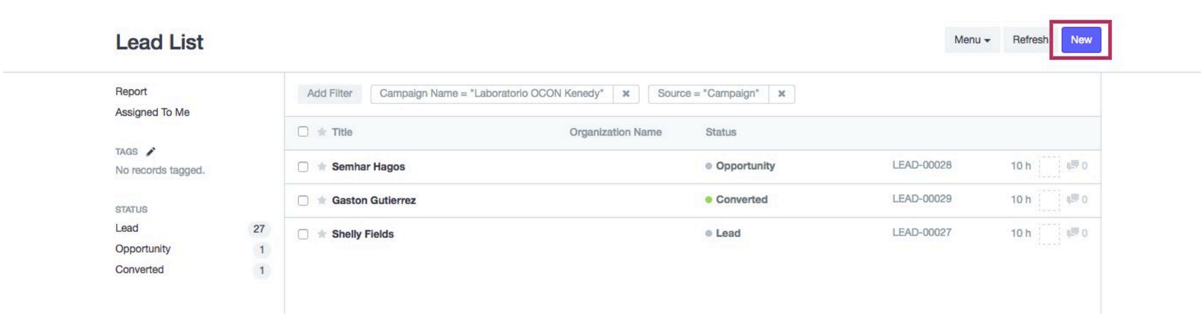


You can track Lead, Opportunity, Quotation against a campaign. Track Leads against Campaign

- To track a 'Lead' against a campaign select 'View Leads'.

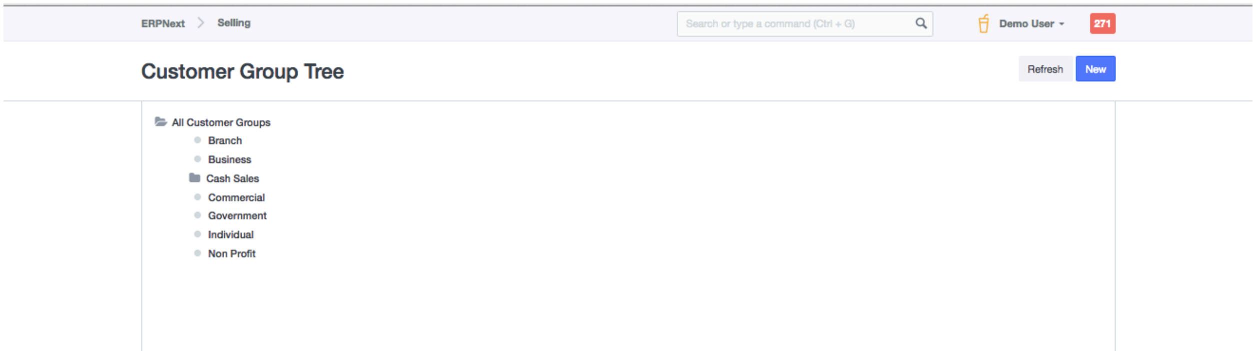


- You shall get a filtered list of all leads made against that campaign.
- You can also create new leads by clicking 'New'

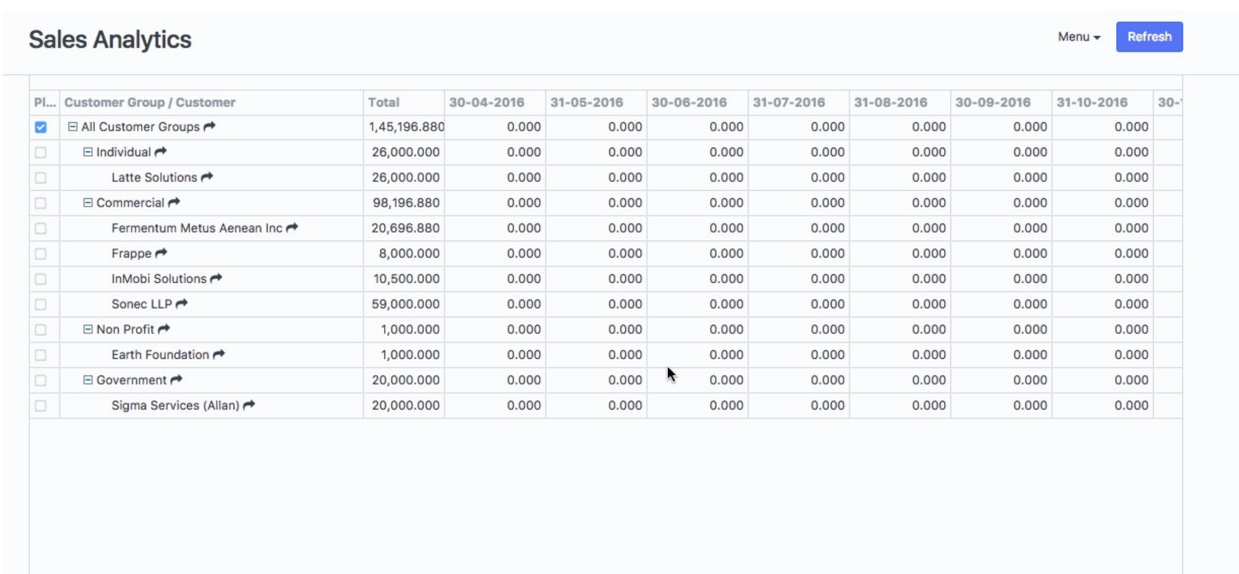


2. Customer Group

Customer groups allow you to organize your customers. You can also have discounts based on customer groups. You can also get trend analysis for each group. Typically, Customers are grouped by market segment (that is usually based on your domain).



Tip: If you think all this is too much effort, you can leave it at "Default Customer Group". But all this effort, will pay off when you start getting reports. An example of a sample report is given below:

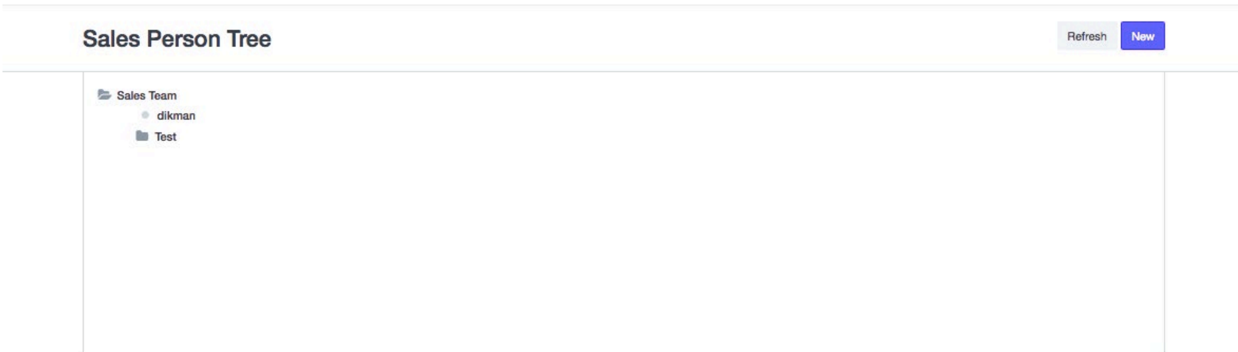


Sales Analytics

Pl...	Customer Group / Customer	Total	30-04-2016	31-05-2016	30-06-2016	31-07-2016	31-08-2016	30-09-2016	31-10-2016	30-[illegible]
	All Customer Groups	1,45,196.880	0.000	0.000	0.000	0.000	0.000	0.000	0.000	
	Individual	26,000.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	
	Latte Solutions	26,000.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	
	Commercial	98,196.880	0.000	0.000	0.000	0.000	0.000	0.000	0.000	
	Fermentum Metus Aenean Inc	20,696.880	0.000	0.000	0.000	0.000	0.000	0.000	0.000	
	Frappe	8,000.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	
	InMobi Solutions	10,500.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	
	Sonec LLP	59,000.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	
	Non Profit	1,000.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	
	Earth Foundation	1,000.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	
	Government	20,000.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	
	Sigma Services (Allan)	20,000.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	

3. Sales Person

Sales Persons behave exactly like Territories. You can create an organization chart of Sales Persons where each Sales Person's target can be set individually. Again, as in Territory, the target has to be set against Item Group.



Sales Person in Transactions

You can use this Sales Person in Customer and sales transactions like Sales Order, Delivery Note and Sales Invoice.

1.2 Topic: Sales

1. Lead
2. Opportunity
3. Customer
4. Contact

1. Lead

To get the customer through the door, you may be doing all or any of the following:

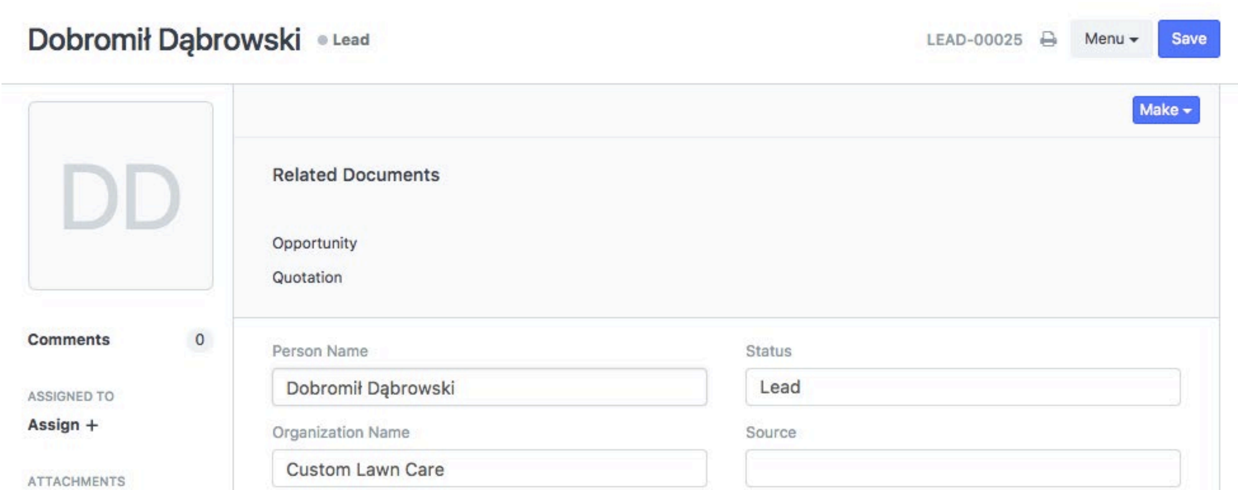
- Listing your product on directories.
- Maintaining an updated and searchable website.
- Meeting people at trade events.
- Advertising your product or services.

When you send out the word that you are around and have something valuable to offer, people will come in to check out your product. These are your Leads.

They are called Leads because they may lead you to a sale. Sales people usually work on leads by calling them, building a relationship and sending information about their products or services. It is important to track all this conversation to enable another person who may have to follow-up on that contact. The new person is then able to know the history of that particular Lead.

Leads are the entities constituting a first contact. Leads can be created by a system user or by a web-user. When a lead is created minimal info (name, email) is entered and the lead is (default) linked to the active system user, the owner of the lead A user configurable drop list is used to classify Status of the lead (Open, Replied etc.)

To create a Lead, go to: CRM > Lead > New Lead



ERP+ gives you a lot of options you may want to store about your Leads. For example, what is the source, how likely are they to give you business etc. If you have a healthy number of leads, this information will help you prioritize who you want to work with.

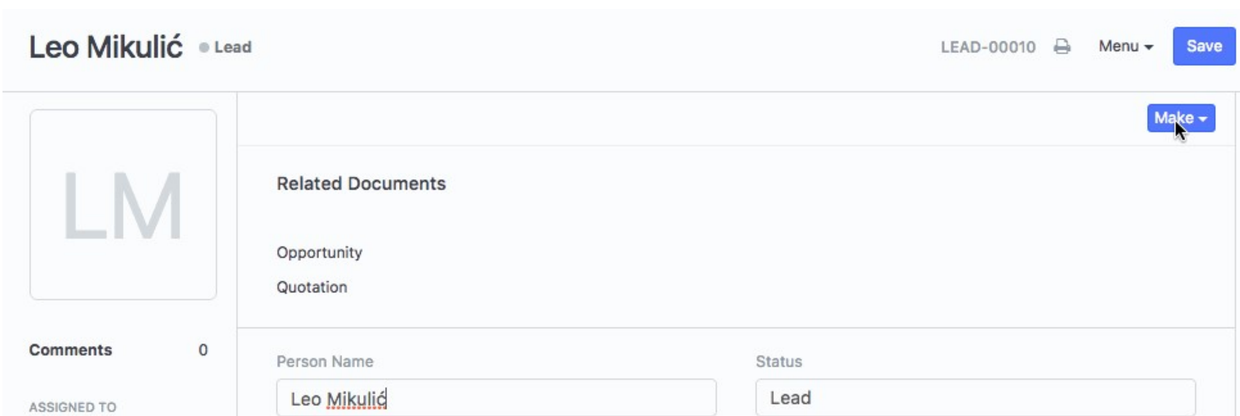
Tip: ERP+ makes it easy to follow-up on leads by updating the "Next Contact" details. This will add a new event in the Calendar for the User who has to contact the lead next.

Difference between Lead, Contact and Customer

A Lead is a potential Customer, someone who can give you business. A Customer is an organization or individual who has given you business before (and has an Account in your system). A Contact is a person who belongs to the Customer.

A Lead can sometimes be an organization you are trying to make a deal with. In this case you can select "Lead is an Organization" and add as many contacts within this organization as you want. It is useful if you are establishing a relationship with several people within the same organization.

A Lead can be converted to a Customer by selecting "Customer" from the Make dropdown. Once the Customer is created, the Lead becomes "Converted" and any further Opportunities from the same source can be created against this Customer.



Creation via Portal

If a someone creates an account through the website interface is Lead is automatically created, status is Open and the Owner is the web user.

After registration the webform Addresses is called, where the web user can enter address information. The address is linked to the lead using the Lead Name-Address Type as ID.

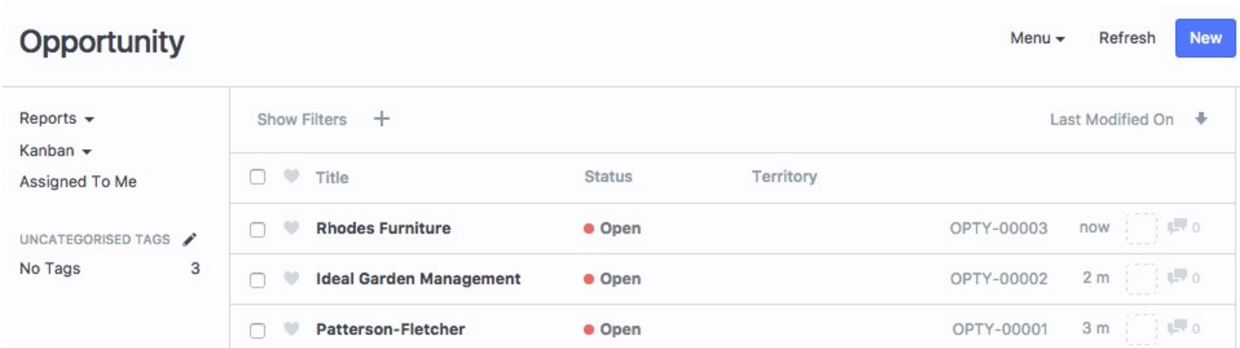
If using the Cart functionality, items are ordered the Lead is Converted and a Customer is created using the Web-User Name. Because a Customer can only be linked to a web user using the (foreign) ID in Contact, such contact has to be created as well.

Opportunity

When you know a Lead is looking for some products or services to buy, you can track that as an Opportunity. Also, opportunity document helps user to collect the requirement of a customer/lead.

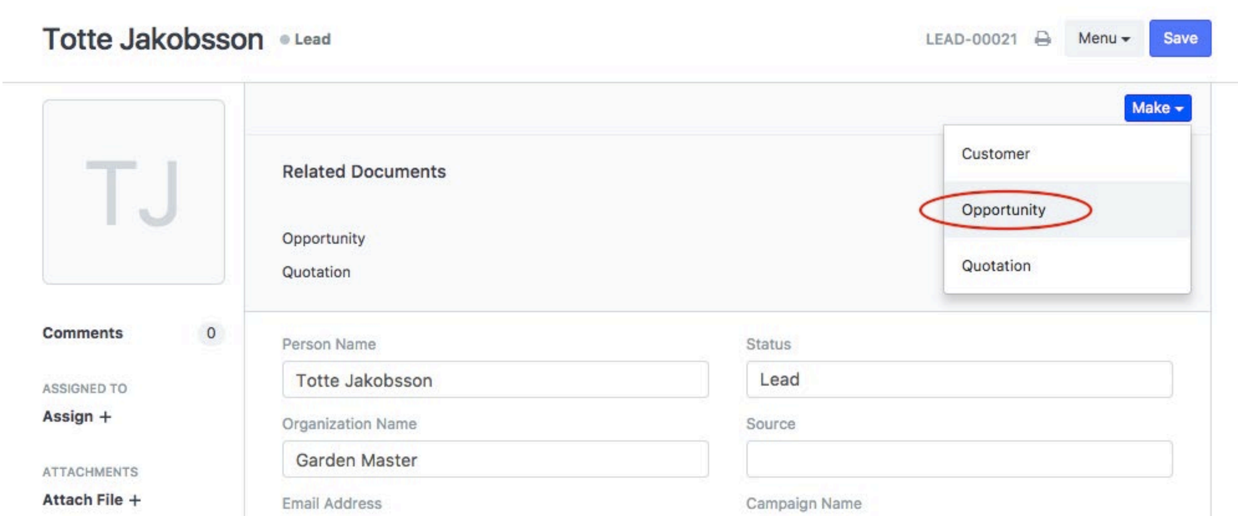
You can create an Opportunity from: CRM > Opportunity > New Opportunity

Create Opportunity

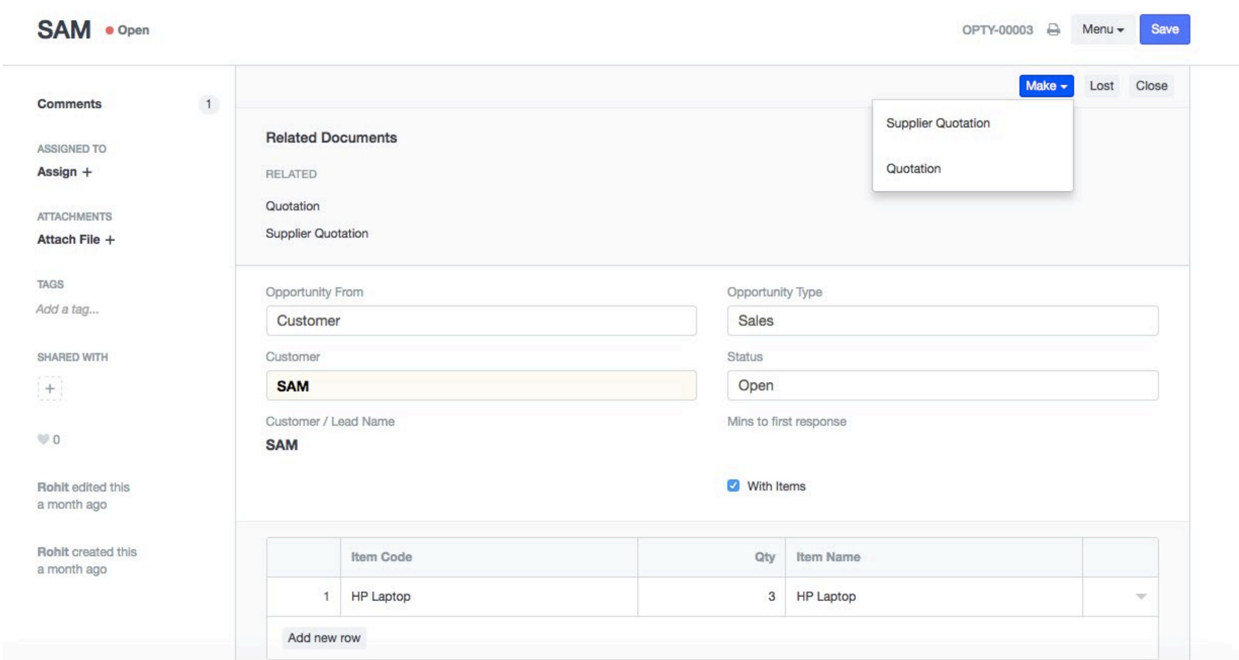


You can also go to an “Open” Lead and select “Opportunity” from the Make dropdown.

Create Opportunity from an open Lead



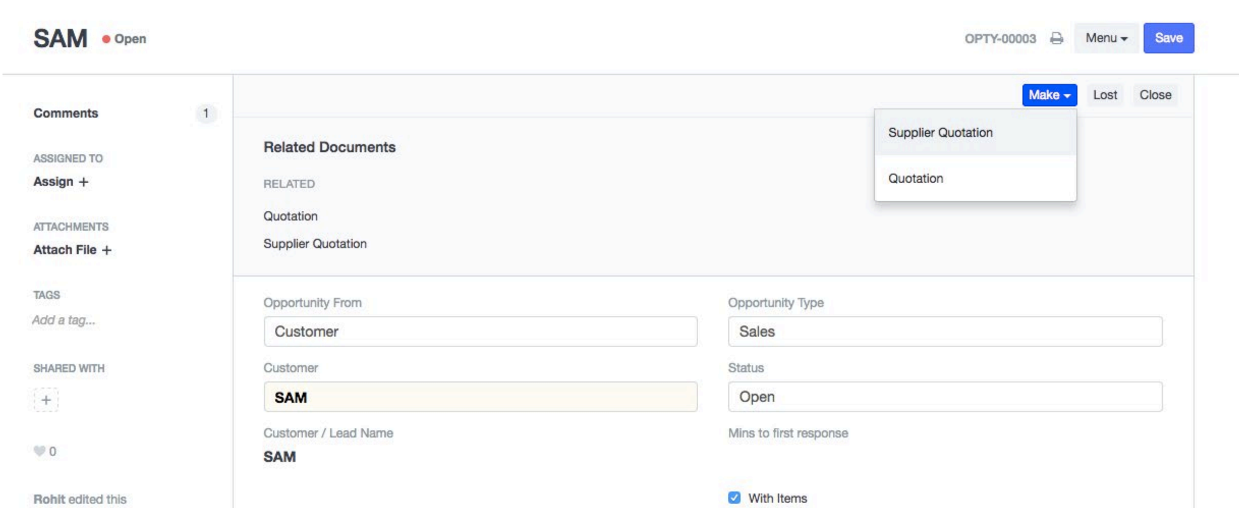
Create Opportunity for Customer to Collect their Requirement



An Opportunity can also come from an existing Customer. You can create multiple Opportunities against the same Lead. In Opportunity, apart from the Communication, you can also add the Items for which the Lead or Contact is looking for.

Make Supplier Quotation

In some businesses, users collect the rates from their supplier against the customer requirement and based on the supplier rates they prepare the quotation for the customer. With ERP+, you can make a supplier quotation from the opportunity itself.



Best Practice: Leads and Opportunities are often referred as your "Sales Pipeline" this is what you need to track if you want to be able to predict how much business you are going to get in the future. It is always a good idea to be able to track what is coming in order to adjust your resources.

2. Customer

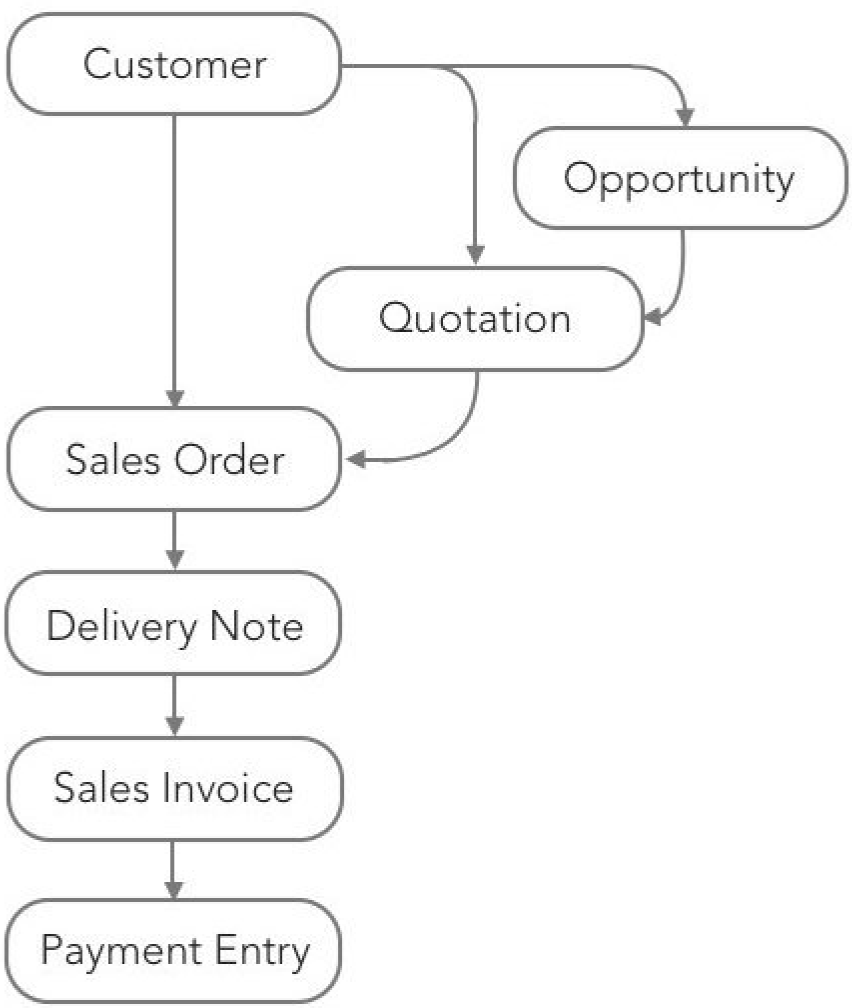
A customer, who is sometimes known as a client, buyer, or purchaser is the one who receives goods, services, products, or ideas, from a seller for a monetary consideration. A customer can also receive goods or services from a vendor or a supplier for other valuable considerations.

A customer is uniquely identified by the Customer ID. Normally this ID is identical to the customer Full Name, but in case of duplicate Full Name, a Name-1 is created as ID.

You can either directly create your Customers via: Selling > Customer

or upload it via the Data Import Tool.

A Customer can avail the features (operations) in the selling process. The general flow can be summarized as:



Note: Customers are separate from Contacts and Addresses. A Customer can have multiple Contacts and Addresses.

Contacts and Addresses

Contacts and Addresses in ERP+ are stored separately so that you can attach multiple Contacts or Addresses to Customers and Suppliers

Thus, we may have identical Customer Names that are uniquely identified by the ID. Since the email address is not part of the customer information, the linking of Customer and User is through Contacts.

Integration with Accounts
In ERP+, there is a separate Account record for each Customer, for each Company.

When you create a new Customer, ERP+ will automatically create an Account Ledger for the Customer under “Accounts Receivable” in the Company set in the Customer record.

Advanced Tip: If you want to change the Account Group under which the Customer Account is created, you can set it in the Company master. If you want to create an Account in another Company, just change the Company value and “Save” the Customer again.

By default, the system does not generate an account for every customer. All Customers can be booked in one account called Debitors. In order to manage a separate account for each customer, you have to first create the account under Accounts Receivable in the Chart of Accounts and then add it on the customer's form accounts table.

Customer Settings
You can link a Price List to a Customer (select “Default Price List”), so that when you select that Customer, the Price List will be automatically selected.

You can set “Credit Days”, so that it is automatically set due date in the Sales Invoices made against this Customer. Credit Days can be defined as fixed days or last day of the next month based on invoice date.

You can set how much credit you want to allow for a Customer by adding the “Credit Limit”. You can also set a global “Credit Limit” in the Company master. Classifying Customers

ERP+ allows you to group your Customers using Customer Group and also divide them into Territories Grouping will help you get better analysis of your data and identify which Customers are profitable and which are not. Territories will help you set sales targets for the respective territories. You can also mention Sales Person against a customer.

Sales Partner

A Sales Partner is a third-party distributor / dealer / commission agent / affiliate / reseller who sells products to companies, for a commission. This is useful if you make the end sale to the Customer, involving your Sales Partner.

If you sell to your Sales Partner who in-turn sells it to the Customer, then you must make a Customer instead.

3. Contact and Address

Contacts do not need to be linked to another document, they can be stand alone. You can even create a contact with only a first name, not linked to any other document or party (Customer/Supplier).

The Contact_ID is automatically created:

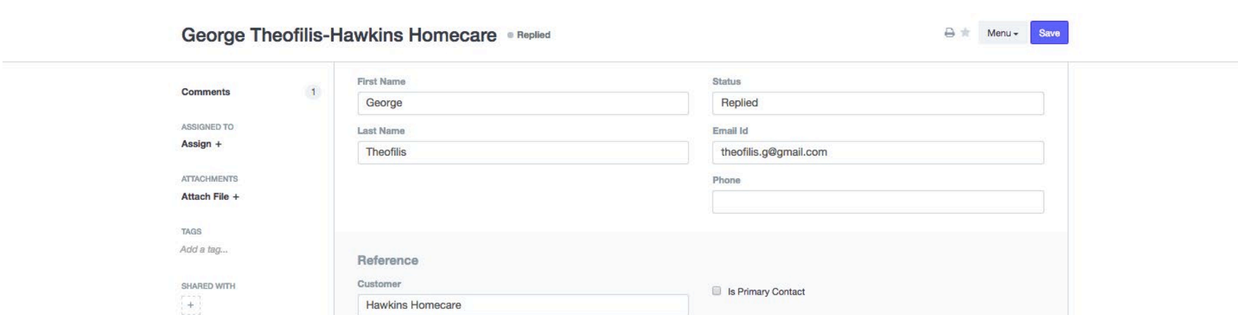
1. If only a First Name is entered that First Name defines the ID, thus First name (only)
2. If a First Name and a Party is linked the ID becomes “FirstName-Party”

Contacts can, but do not have to be linked, to: User, Customer, Supplier, and Sales Partner. Since Customers and Addresses are not directly linked to a User, all links go via Contacts.

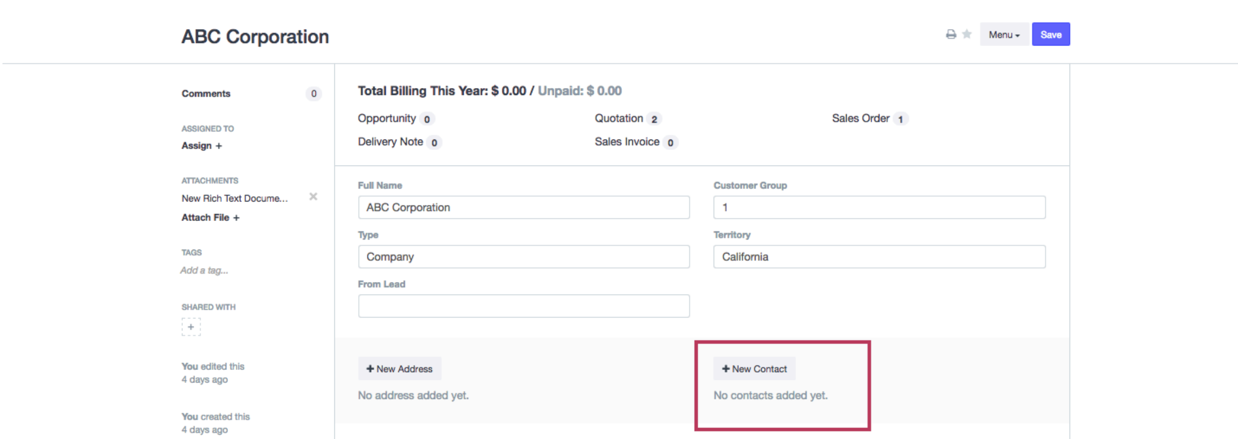
A Contact can be linked to the (web) user. If that user is also a Customer, it is linked to the Customer by the Customer ID

Contacts and Addresses in ERP+ are stored separately so that you can attach multiple Contacts or Addresses to Customers and Suppliers.

To create a new Contact, go to: CRM > Contact > New



Or you can add a Contact or Address directly from the Customer record, click on “New Contact” or “New Address”.



Tip: When you select a Customer in any transaction, one Contact and Address gets pre-selected. This is the “Default Contact or Address”.

To Import multiple Contacts and Addresses from a spreadsheet, use the Data Import Tool.

Address Titles

The Address Title (Name of person or organization that this address belongs to) is a free format unlinked field. The ID is automatically created from the Address Title and Address Type. (AddressTitle - AddressType).

Address Linking

Addresses can be entered individually (unlinked) or linked to customers, leads, suppliers or Sales Partners.

Linking is done in the reference section where the links can be established.

1.3 Topic: Reports

1. CRM Reports

1. CRM Reports

CRM module's reports helps users to get the information about the prospects. Using Following reports, user can analyze the data about prospect's history with a company and will helps user to build strong relationships with them.

Lead Details

It has data about the leads and their contact and address details.

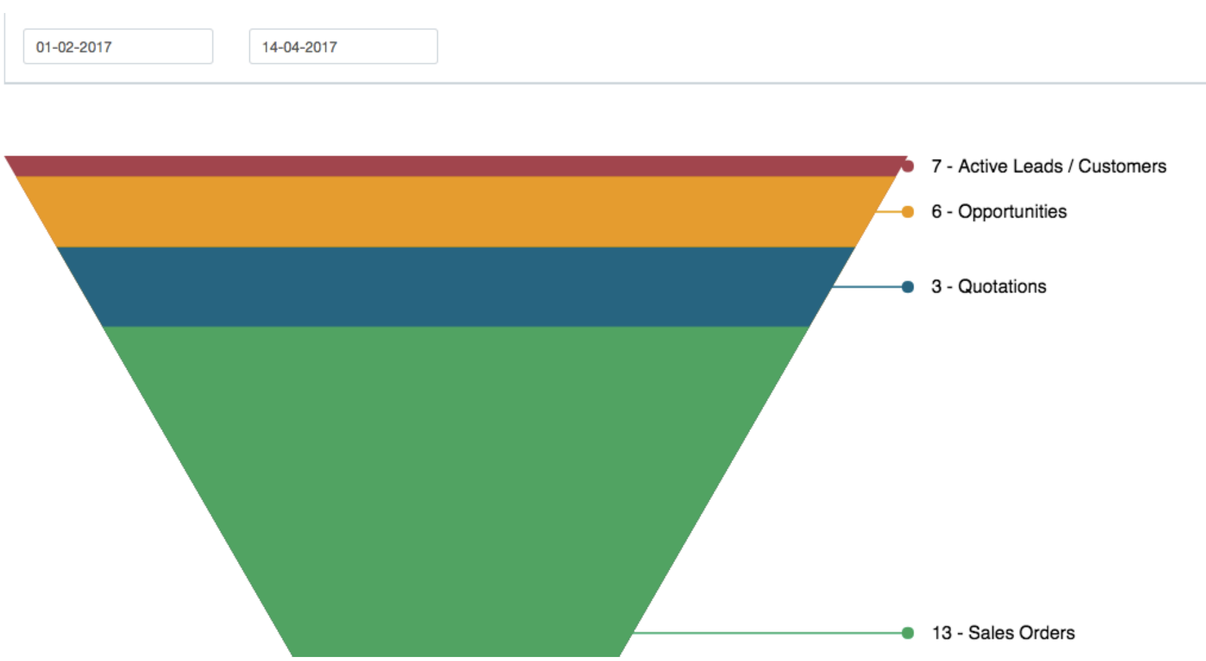
Lead Id	Lead Name	Company Name	Status	Address	State	Pincode
LEAD-00001	John	JTC Pvt. Ltd	Converted			
LEAD-00002	Viral Shah	Propell Paints	Replied			
LEAD-00003	Chris	Alpha Ltd.	Lead			
LEAD-00004	Sujit	Raywild	Converted	24		

Sales Funnel

By using the sales funnel report, and by quantifying the number of prospects at each stage of the process, you can get an idea of your potential customers.

More than this, by looking at the way these numbers change over time, you can identify problems in the sales pipeline and take any corrective action at the early stage.

For example, if you notice that very few communications with the prospects has taken place in a month which might indicate a decrease in the sales. From the next month, organization should make sure that more communications have to take place with the prospects.



Prospects Engaged but Not Converted

Using this report, user gets the information about the leads who has shown interest in the business with you but due to some reason they were not converted into the customers.

Lead | 1 | 150

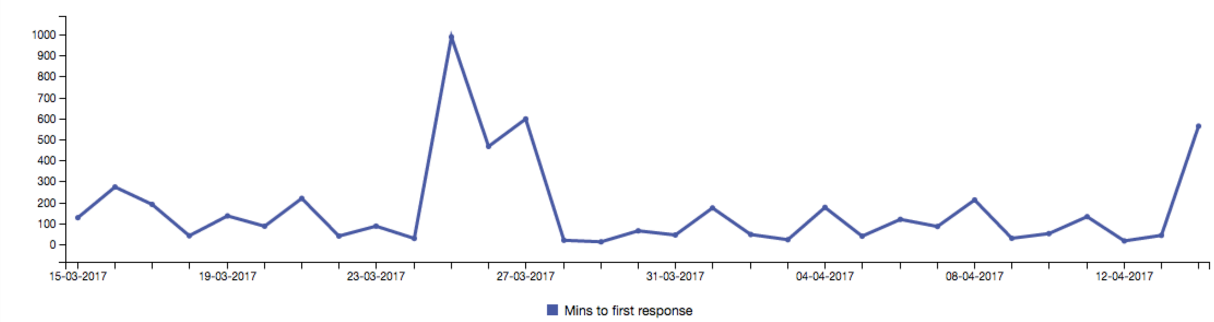
Sr No	Lead	Name	Organization	Reference Document	Reference Name	Last Communication	Last Communication Date
1	LEAD-00014	Kapil		Lead	LEAD-00014	Lost Quotation	22-03-2017 14:58:48
2	LEAD-00017	Chinmay	Ripple Frangra...	Quotation	QTN-00032		28-02-2017 13:03:22
3	LEAD-00016	Ummiii		Lead	LEAD-00016	Opportunity	21-02-2017 11:33:51
4	LEAD-00015	Kanchan		Lead	LEAD-00015	Opportunity	21-02-2017 11:31:49
5	LEAD-00013	Antoine		Lead	LEAD-00013	Opportunity	02-02-2017 18:45:13
6	LEAD-00009	Arundhati	Exon	Lead	LEAD-00009	Opportunity	07-12-2016 14:50:38
7	LEAD-00008	Shachi	Anhox	Lead	LEAD-00008	Opportunity	07-12-2016 13:09:53
8	LEAD-00007	Mr. X	Y Sources	Lead	LEAD-00007		25-11-2016 14:52:49

Minutes to First Response for Opportunity

Immediacy is so important – and so valued in this internet area, we all expect a quicker response time to any of our query. This report gives you the information about the first response time given to an opportunities or issues. Using this report, the organization can improve their first response time to the prospects which can help to the better sales in the future.

15-03-2017 | 14-04-2017

Hide Chart



Sr No	Date	Mins to Fi...
1	14-04-2017	563.000
2	13-04-2017	42.900
3	12-04-2017	16.438
4	11-04-2017	131.929
5	10-04-2017	51.182

Customer Addresses and Contacts

It has data about the customers and their contact and address details.

Sr No	Customer...	Customer...	Customer...	Address L...	Address L...	City	State	Postal Code	Country	Is Primary...	First Name	Last Name	Phone
1	Ashraf Sha...	Ashraf Sha...	Commercial										
2	Baba	Baba	Individual								A sharma		
3	Baba	Baba	Individual								Eric	Bana	
4	Bullows Pa...	Bullows Pa...	Commercial								Manoj	Gupta	
5	C-Ace Har...	C-Ace Har...	Commercial	789		New York			United Sta...	✓	Mayur		
6	Charlie	Charlie	Commercial										
7	CUST-00001	test Custo...	All Custom...										
8	CUST-00002	Arundhati ...	Individual								Arundhati ...		
9	CUST-00003	Kanchan	Individual								Kanchan		
10	Customers 1	Customers 1	Commercial										
11	DimensionIE	DimensionIE	Commercial										
12	Dipesh	Dipesh	Commercial								Dipesh		
13	EuroSteel	EuroSteel	Commercial								Sujata		
14	Frappe Se...	Frappe Se...	Commercial								Shachi		

Inactive Customers

This report shows the list of customers who has not purchased since long time.

60

Sales Order

Sr No	Customer	Customer Name	Territory	Customer Group	Number of Order	T
1	Baba	Baba	All Territories	Individual	4	
2	Dipesh	Dipesh	All Territories	Commercial	1	
3	EuroSteel	EuroSteel	All Territories	Commercial	2	
4	Frappe Services	Frappe Services	All Territories	Commercial	1	
5	Semantics	Semantics	All Territories	Commercial	1	
6	Smital	Smital	All Territories	Commercial	1	
7	Sterling Services	Sterling Services	Rest Of The World	Commercial	1	
8	Umair Sayed	Umair Sayed	All Territories	Individual	1	
9	Zarna tech	Zarna tech	All Territories	All Customer Grou...	1	

1.4 Topic: Others

1. Newsletter

1. Newsletter

A newsletter is a short-written report that tells about the recent activities of an organization. It is generally sent to members of the organization, potential clients, customers, or potential leads.

In ERP+, you can use this UI to send any type of communication to a large number of audiences. The process of sending bulk email to a target audience is very simple and easy.

Select the list that you want to send the email to. Fill in your content in the message box, and send your newsletter. If you wish to test your email, to see how it looks to the recipient, you can use the test function. Save the document before testing. A test email will be sent to your Email Address. You can send the email to all the intended recipients by clicking on the send button.