Customer Relationship Management

This relationship usually starts with

- marketing communications,
- sales

and continues till

- customer service,
- fulfilled payments and
- customer feedback.

Improsys CRM Help Customer Relationship by

FULFILLING WHAT'S COMMITTED

Improsys CRM

Failure to deliver what's promised

Wrong payment schedules

Service schedules not committed

Deliver what's promised

On-Time Delivery

Customer satisfaction

Improsys CRM Help Customer Relationship by

AFTER SALES SERVICE

" YOUR CALL IS VERY IMPORTANT TO US, SO PLEASE CONTINUE TO HOLD . "

Improsys CRM

Late replies to service queries

Poor service delivery

Incomplete customer feedback

Prompt replies to enquiries

Good service delivery

Ensure customer satisfaction with feedback

Improsys CRM Help Customer Relationship by

IMPROVING PRODUCT QUALITY

Improsys CRM

Specifications not clear

Applications not mentioned

Crystal clear specifications

Applications not mentioned

Incorrect scope of supply

correct scope of supply

IMPROSYS ® CRM SOFTWARE

www.improsys.in

FOLLOW-UP FACTS

IMPROSYS ® CRM SOFTWARE

Business Statistics of Sales Personnel	Sales Follow-Up Statistics
48% of sales personnel never follow-up with a prospect.	**2%** of sales are made in first contact.
25% of sales personnel make second follow-up and stop.	**3%** of sales are made in second contact.
12% of sales personnel make third follow-up and stop.	**5%** of sales are made in third contact.
Only 10% of the sales personnel make more than 3 contacts.	**80%** sales are made in 5th to 12th contact.

*Source: National Sales Executive Association

80% of potential opportunities are lost simply due to lack of follow-up.

It takes **5 continuous** follow-ups after first contact, before a customer gives sales order.

An average sales person makes only **2 attempts** to reach a prospect.

www.improsys.in

CASHFLOW MANAGEMENT FACTS

Cash-Flow Issues

79% of Indian SME's believe their most crucial challenge to be a "dearth of easy finance and credit instruments".

80% of business failures were down to poor cash-flow.

*Source: https://hummingbill.com

Business Statistics of Cash-Flow in India

60% of SMEs in India receive payments from clients only after 60 days or longer

35% receive their receivables due only after 90 days or longer.

At any given point of time, about 15-20% of the revenues are locked up due to delayed payments.

*Source: https://hummingbill.com

Most of the businesses struggle because of a major reason
Poor cash flow.

PROPER COMMUNICATON FACTS

55% of consumers have intended to make a purchase, but backed out because of **poor clarity** of the offerings they have been given by the seller.

Quotations is a major tool in your organization which helps you to **communicate** with the customer in the most **effective way**.

Importance of Quotations in Business

Quotations help you structure your pricing and the services you offer.

Quotations usually state the price, terms and conditions of business clearly.

It encourages transparency between you and your customers.

It brings you closer to a sale by encouraging the customer to make a decision.
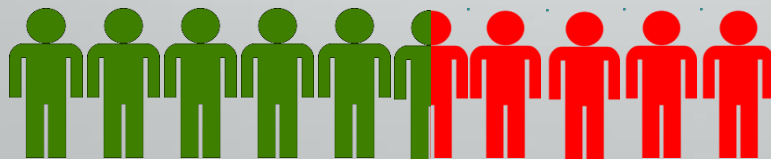
AFTER SALES SERVICING FACTS

It is **6-7 times** more costly to attract a new customer than it is to retain an existing customer.

I had such bad service, I stopped using them!

Wow! I'll stop, too.
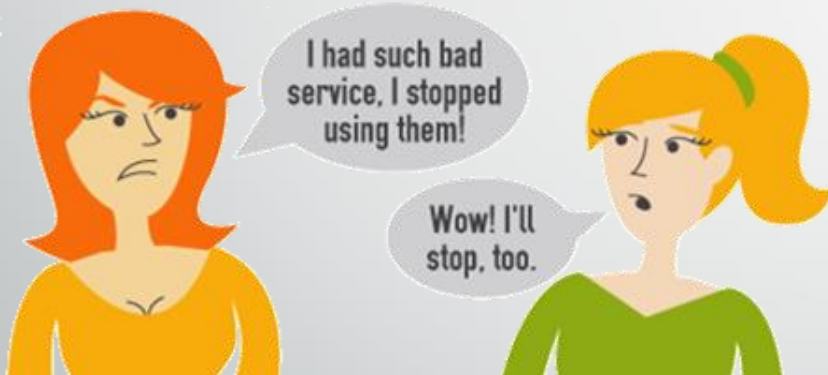
89% of consumers have stopped doing business with a company after experiencing poor customer service.

55% of consumers would pay more for a better customer experience.

IMPROSYS ® CRM SOFTWARE

INTERESTING CRM STATISTICS

Increase Sales by up-to **29%**

Increase Sales productivity by up-to **34%**

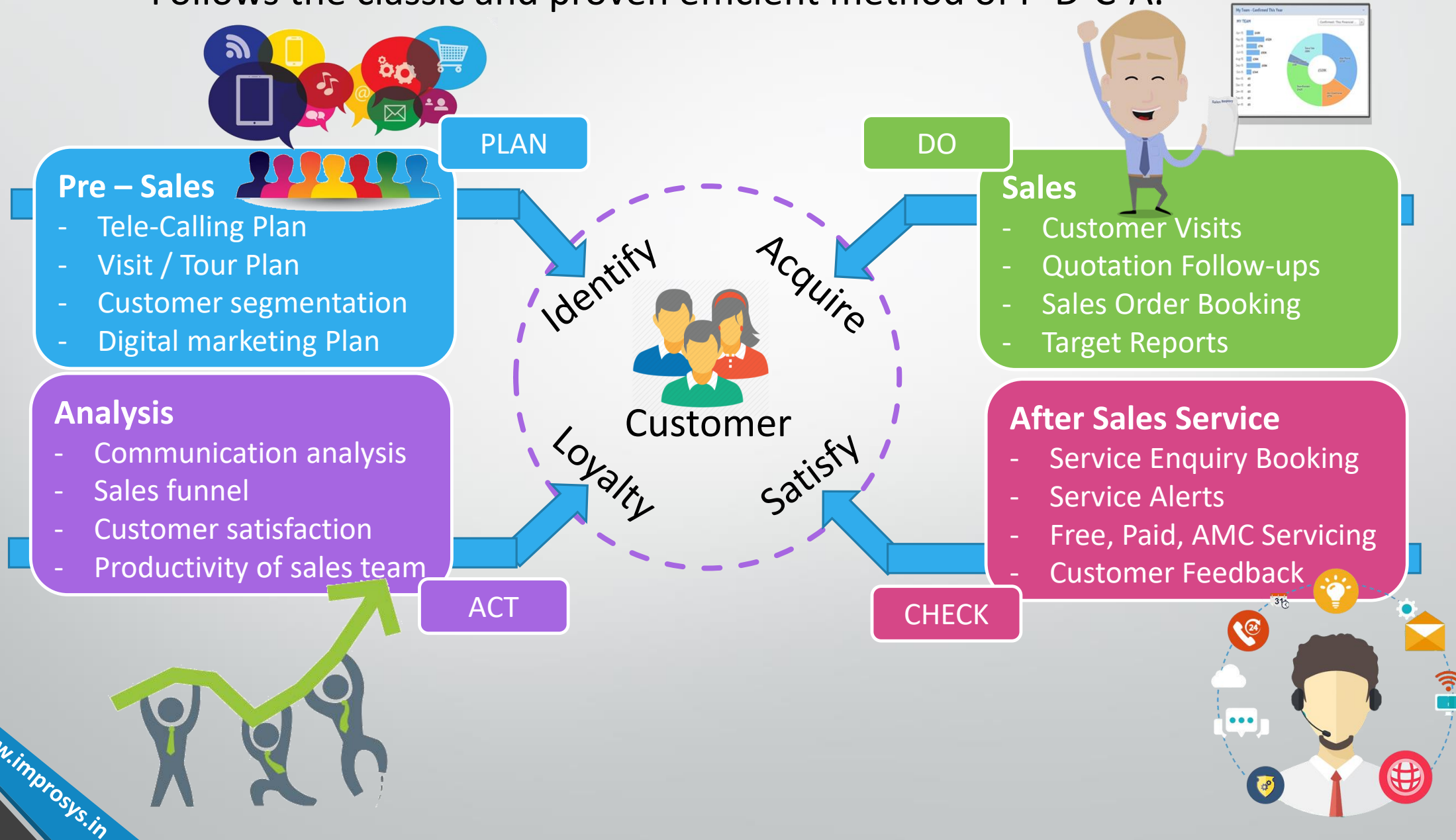Increase Sales forecast accuracy by **42%**

*Source: SalesForce

CRM

IMPROSYS®
CRM (Customer relation Management)

Treasuring your relations

www.improsys.in

IMPROSYS CRM

Follows the classic and proven efficient method of P-D-C-A.

PLAN

Pre – Sales
- Tele-Calling Plan
- Visit / Tour Plan
- Customer segmentation
- Digital marketing Plan

DO

Sales
- Customer Visits
- Quotation Follow-ups
- Sales Order Booking
- Target Reports

Identify

Acquire

Customer

Loyalty

Satisfy

Analysis
- Communication analysis
- Sales funnel
- Customer satisfaction
- Productivity of sales team

After Sales Service
- Service Enquiry Booking
- Service Alerts
- Free, Paid, AMC Servicing
- Customer Feedback

ACT

CHECK

Key Features of Improsys CRM software

1. USER FRIENDLINESS

Only business knowledge required to operate.

Knowledge of Google Search and Email is sufficient to operate.

Simple entry and edit screens for more user friendliness.
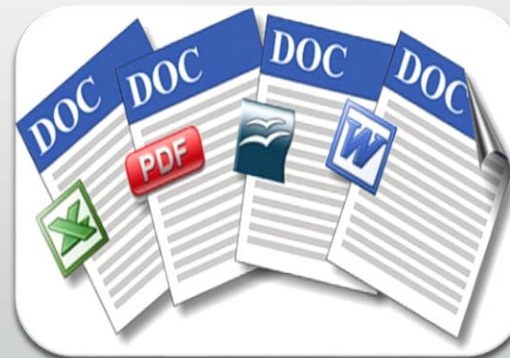

No training required.
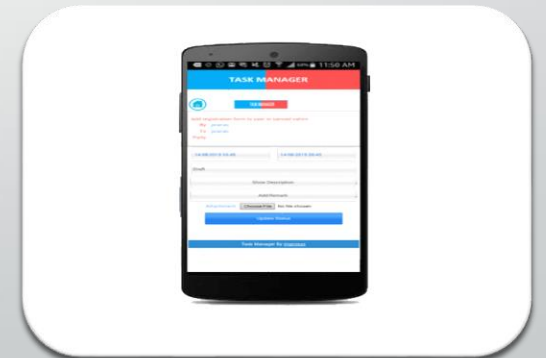
IMPROSYS ® CRM SOFTWARE

2. TECHNOLOGY

Multiuser software.

Email and SMS sending directly through software.

Export in Excel, Word and PDF.

Option to opt for mobile CRM.
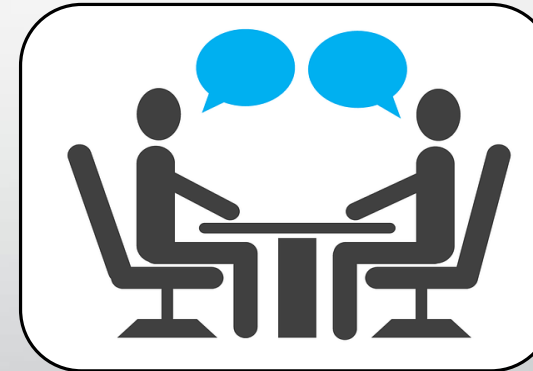
Key Features of Improsys CRM software

3. BUSINESS FUNCTIONALITY

Improves productivity by avoiding the repetitive task.

Improve on-time follow ups of Quotations and Payments.

Track communication with Customer & Internal Team.

Faster decision making and ROI.

www.improsys.in

Benefits of Improsys CRM software
For Business Managers

- Decision making based on data, rather than on gut feeling.

- Better communication between departments

- Less dependency on people for business related tasks.

- Effective time management

- The worth of each client relationship is understood

CONTACTS - IMPROSYS® CRM SOFTWARE
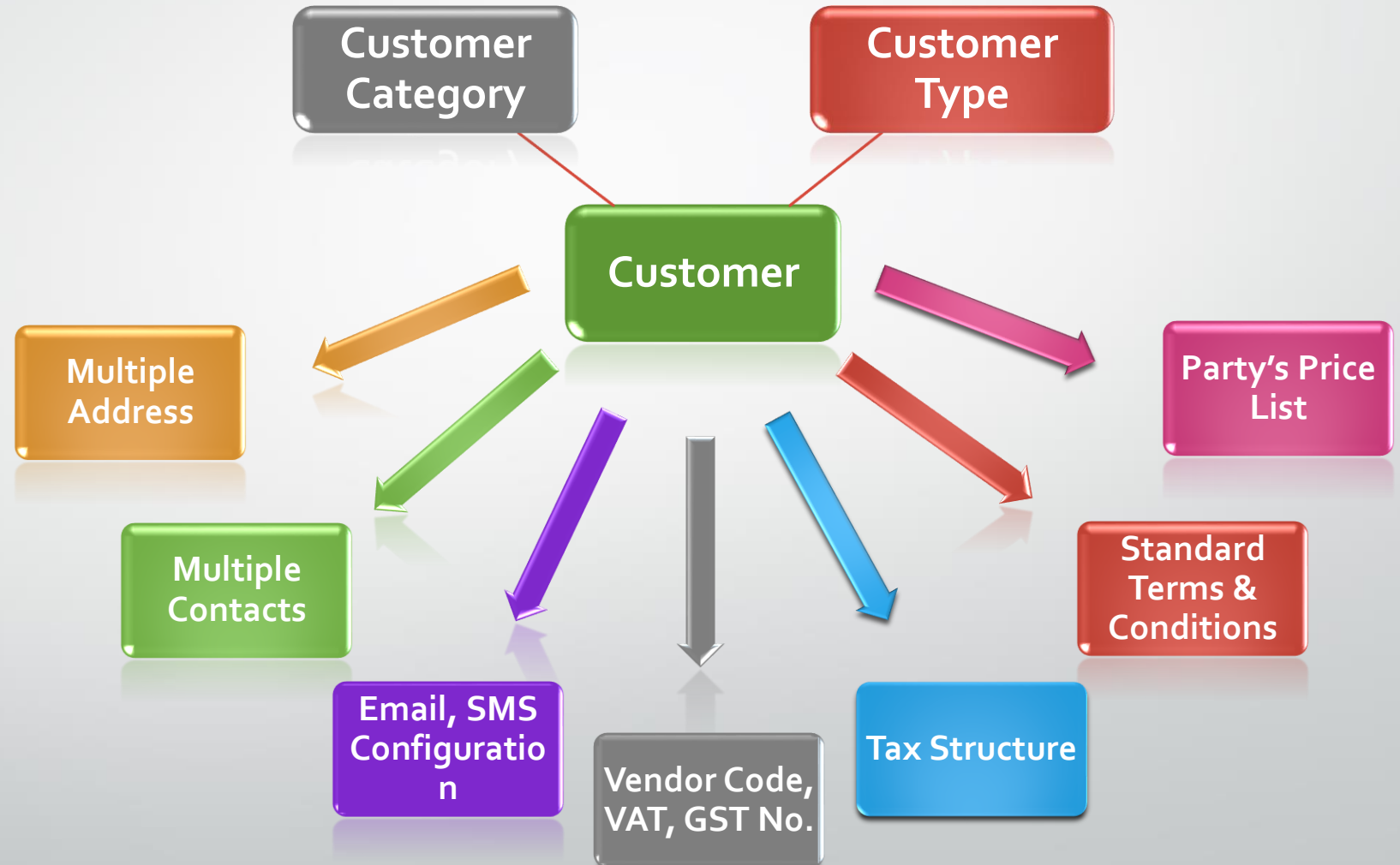## FEATURES - CONTACT MANAGEMENT

✓ Facility to group contacts into separate category.
   e.g. Customer, Supplier, Vendor, etc.

✓ Multiple Address, Contacts adding facility for Customers.

✓ Customer's Commercial Details addition facility. e.g. VAT No., PAN No., GST No., etc.

✓ Facility to add important against contacts such as Birthdays and Anniversaries to send messages and emails to customers.

✓ Tax structure can be defined for each customer. e.g. VAT, CST, Excise Duty, GST.

✓ Document can be send directly on email to customer.

CUSTOMER INFORMATION

tax

Add New Party

Party Category	Software	Party Type	Properitership
Party Name	Improsys	Party Code	IMPROSYS780

1

Party Address

Address Type	Main Address
Address Line 1	A/24 Mavalankar Industrial Estate
Address Line 2	45, Dr Ambedkar Road
Address Line 3	Near RTO,
City	Pune
Pin	411004
State	Maharashtra
Country	India

2

Party Contacts

Contact Purpose	EmailandSms
Contact Type	CustomerHead
Person Name	Mrs. Varsha
Designation	Purchase Head
Phone No	20238334315
Mobile No	8796264287
Fax No	25896379
Email ID 1	amey@improsys.in
Email ID 2	
Location	

3

Save Party Details

1 Enter Organization name, allot contact into party category and type.

2 Enter contact address

3 Contact person details such as email id, phone number etc.

www.improsys.in

IMPROSYS ® CRM SOFTWARE

IMPROSYS ® CRM SOFTWARE

1 Facility to add Multiple addresses against a organization

2 Facility to add Multiple contact persons against a organization

3 Add commercial details such as CST No. VAT No. Vendor Code

1 Addresses **2** Contacts **3** Reference | Item | Taxes

Party Contacts

Contact Purpose	EmailandSms	Contact Type	CustomerHead
Person Name	Mr. Jamal Akhtar	Department	Gynaec
Phone 1	02112624545	Date Of Birth	01-Jun-1983
Mobile 1	9986598874	Aniversary Date	16-Jul-2009
Email 1	jamalakhtar@gmail.com		
Fax 1	25896379		
Contact Status	Active		

Add New Contact

	Contact Purpose	Contact Person	Phone	Mobile	Fax	Email ID1	Email ID2	Birth Date	Aniversary Date	Status	
Edit	EmailandSms	Narendra Kumar M	08041127524	9945955222		dr.narendrakumar@medstarhospital.in				☑	Delete
Edit	Email	PAWAN KUMAR		9986799445		pawan.kumar@pridex.in				☑	Delete
Edit	Email	ANUP BAGADE		8554999014		anup.bagade@pridex.in				☑	Delete

www.improsys.in

3 Add commercial details such as CST No. VAT No. Vendor Code

| Addresses | Contacts | Reference | Item | Taxes |

Party Reference

Party Reference No [GST CODE ▼]

Party Reference Description
22AAAAA0000A1Z5

Party Reference Status [Active ▼]

[Add New Reference]

	Reference Name	Description	Status
Edit	ST NO	472023090S	☑
Edit	VAT NO	24639238V	☑
Edit	CST NO	24639238C	☑
Edit	Vendor Code	2940SBW3	☑

www.improsys.in

IMPROSYS ® CRM SOFTWARE

IMPROSYS ® CRM SOFTWARE

1 Link organization specific item codes with internal item codes along with separate rates for same item for different organizations.

5 Define tax structure for each organization defined in the system.

FEATURES - TAX MANAGEMENT

5 Define tax structure for each organization defined in the system.

	Addresses	Contacts	Reference	Item	Taxes

Party Taxes

Tax Code	Tax Type	Default Value	Description	TaxOn	TaxOn Amount	Plus/Minus	Apply
VAT	Percentage	13.50	VAT	Basic Amount	100	Plus	☐
CST	Percentage	13.50	CST	Basic Amount	100	Plus	☐
CET	Percentage	12.50	Excise Duty	Basic Amount	100	Plus	☐
HEC	Percentage	1.00	S & H Edu.Cess	Basic Amount	100	Plus	☐
EC	Percentage	2.00	Edu. Cess	Basic Amount	100	Plus	☐
ST	Percentage	14.00	Service Tax	Basic Amount	100	Plus	☑
IN	Amount	0.00	Insurance	Basic Amount	100	Plus	☐
PFC	Percentage	0.00	Packing and Forwarding Charges	Basic Amount	100	Plus	☐
VATW	Percentage	8.00	VAT-WCT	Basic Amount	100	Plus	☐
TCS	Percentage	1.00	TCS	VAT	100	Plus	☐
VAT	Percentage	5.00	VAT	Basic Amount	100	Plus	☐
BF	Percentage	2.29	Bank Fees	Basic Amount	100	Plus	☐
SBC	Percentage	0.50	Swachha Bharat Cess	Basic Amount	100	Plus	☑
KKC	Percentage	0.50	Krishi Kalyan Cess	Basic Amount	100	Plus	☑

Add New Tax

	Tax Code	Tax Type	Tax Value	Description	TaxOn	Charge On Amount	Plus/Minus	
Edit	ST	Percentage	14.00	Service Tax	Basic Amount	100.00	Plus	Delete
Edit	SBC	Percentage	0.50	Swachha Bharat Cess	Basic Amount	100.00	Plus	Delete
Edit	KKC	Percentage	0.50	Krishi Kalyan Cess	Basic Amount	100.00	Plus	Delete

Improsys
427 BR-1,B-Wing Jai Ganesh Vision,
Akurdi
Pune-411035
Maharashtra
India

Tel.:+91-020-46700036
Fax :
Email :crm@improsys.in
Web Site: http://www.improsys.in

Detail Party Report-Improsys(MAHINDRA02)

Party Code: MAHINDRA02
Party Name: Improsys
Party Address:

SrNo.	Address Type	Contact Person	Address 1	Address 2	Address 3	City	State	Country	Pin. No.	Phone No.
1	Main Address	Mr. Narendra Palkar	Plot No A-1/1,	Chakan Industrial Area Phase IV	Village Nigoje Chakan Tal – Khed	Pune	Maharashtra	India	410501	9967836111

Party Contacts:

SrNo	Contact Purpose	Contact Person Name	Person Person Desgnition	Contact Person Email	Contact Person PhoneNo	Person Mobile	Contact Type	Contact Location
1	EmailandSms	Mr. Narendra Palkar	Chairman	palkar.narendra@mahindra.com		9967836111	CustomerHead	
2	EmailandSms	Mr. P K Pavri	Director	pavri@ahuramazdagroup.com		919820056544	CustomerHead	
3	Email	Mr. Omprakash Sharma	Accounts	account@nihva.com		8380090880	Accounts	
4	Email	Mr. Anil Kumar	Project Co-ordinator	projects@nihva.com		8551095333	Projects	
5	Email	Ms. Shubhra Ambekar	Sales Co-ordinator	care@nihva.com		9999999999	Sales Co-ordinator	

Party References:

SrNo.	Party Reference Type	Party Reference Description
1	PAN NO	AAFCM0476N
2	VAT NO	27280654544V W.e.f. 24.4.2008
3	CST NO	27280654544C w.e.f. 24.4.2008
4	ECC NO	AAFCM0476NXM002

Party Taxes:

SrNo.	Charges Code	Charge Description	Charges Type	Charges Amount	Charge Action	Charge On	Charge Amount
1	HEC	Higher Education Cess	Percentage	1.00	Plus	Basic Amount	100.00
2	EC	Education Cess	Percentage	2.00	Plus	Basic Amount	100.00
3	ST	Service Tax	Percentage	14.00	Plus	Basic Amount	100.00

(ERP 2012- www.Improsys.In)

www.improsys.in

Improsys
427 BR-1,B-Wing Jai Ganesh Vision,
Akurdi Pune-411035
Maharashtra
India

Tel.:+91-020-46700036
Fax:
Email :crm@improsys.in
Web Site: http://www.improsys.in

improsys
improvement in systems

Party Type Wise For 'All'

Sr.No	Category	Party Type	Party Code	Party Name	Address	City	State	PIN	Contact Person	Contact No
1	Industrial	Exhibition	AABHAENT227	Aabha Enterprises	Walvekarnagar	Pune	Maharashtra	411009	Rahul Vijay Shah	9422502552
2	Industrial	Private Ltd	AACORD00197	Aacord	116/3, Sitai Indl Est., Beside Omega heritage, DSK Vishwa rd., Dhayari, Pune www.aacord.com	Pune	Maharashtra	411041	Mr M.K.Patil	2469001754
3	Industrial	Exhibition	AASRAA00243	AASRAA	Bhayandar	Thane	Maharashtra	401105	salauddin shaikh	9820094429
4	Hospital	Private Ltd	ABHIIMPA149	ABHI IMPACT LOGISTICS SOLUTIONS PVT. LTD.	Office No. 16, 3rd Floor, Near Datta Mandir, Baner Road	Pune	Maharashtra	0	Sonali Rabde	9579095790
5	OTHER	Private Ltd	Abhinava01	Mr. Abhinav		.	.	0	Mr. Abhinav	
6	Hospital	Private Ltd	Abhinavb01	Mr. Abhinav Bagadia	Mr. Abhinav Bagadia	Raipur	Chhattisgarh	0	Mr. Abhinav Bagadia	
7	Industrial	Exhibition	ABSOLUTE382	ABSOLUTE india mechatronics	pune	Pune	Maharashtra	411026	Ramchandra Karanje	9503929711
8	Industrial	Other	ACCUWEIG542	Accuweigh automation & solutions Pvt. Ltd	Shed nO.2, Ayush Indl Estate survey no.23/3/1, Mauje Narhe, Near Abhinav Pharmacy College	Pune	Maharashtra	411041	Saurabh Bhagwat	9922000953
9	Industrial	Properitership	ACHIEVEH198	Achieve Hydraulics & Pneumatics	Gat No. 1567, Chikhali - Talawade Road, Shelar-Wasti, Chikhali, Pune	Pune	Maharashtra	412114	Mr R.P. Sonawane	9922449243

www.improsys.in

IMPROSYS ® CRM SOFTWARE

Sales Team Management

www.improsys.in

TEAM MANAGEMENT - IMPROSYS® CRM SOFTWARE

Features - Sales Team Management

✓ Multiple users with different roles can be created.

✓ Separate login ID and password for each user.

✓ Define Role Rights as well as user's Rights.

✓ Reset or Change the password for selected user.

✓ User configuration for sending Email & SMS.

✓ User Logs report.

✓ Defining user hierarchy makes reporting easy for sales executives.

IMPROSYS ® CRM SOFTWARE

Employee Details

Employee Category	SALES	Employee Type	STAFF
Employee Code	STA00016		
Employee Name	Amey Bhawsar		
Employee Status	Active		
Birthday Date	07-Jan-1988	Profile Image	Browse... img001.jpg

Add Employee

1 — Enter detailed employee details along with picture, date of birth, employee category, employee type etc.

Addresses | Contacts | Reference | History

Employee Address Details

Address Type	Main Address		
Contact Person Name	Mr. Adnan	Contact Number	99603859933
Address 1	W-49, Sector-11 ,	City	PUNE
Address 2	District Gautam Budh Nagar,	Pin	411035
Address 3	Above Andhra Bank, Opp R Mall,	State	Maharashtra
		Country	India
		...ss Status	Active

2 — Facility to add contact information and multiple addresses of an employee such as permanent address, residential address, etc.

IMPROSYS ® CRM SOFTWARE

Employee Details

Employee Category	SALES	Employee Type	STAFF

Employee Code STA00016

Employee Name Amey Bhawsar

Employee Status Active

Birthday Date 07-Jan-1988

Profile Image Browse... No file selected.

Add Employee

Reference added successfully

3

Addresses | Contacts | Reference | History

Add Employee Reference Details

Employee Reference Type AADHAR CARD

Attach Document Browse... img001.jpg

Employee Reference Description 0393049595606

Employee Reference Status Active

Add Reference

3 Add employee references such as, Aadhar card no., PAN no, Driving licence no., Bank Details, along with attachments

Added Employee Reference Details

	Refrence Type	Description
Edit	PAN NO	BHK8PYUN8
Edit	DRIVING LICENSE NO	SMWI3959DJ

www.improsys.in

IMPROSYS ® CRM SOFTWARE

Enter basic user name details such as Company email id and password, mobile number, etc.

Select the role of user in software e.g.
a) Administrator
b) Sales Executive, etc.

List view of currently active users.

Add New User User License : 7 / 20

User Name	
Company Email ID	
Company Email Password	
Mobile No	
User ID	
Password	
Confirm Passsword	
User Role	Functional Administrator
Contact Type	CompanyHead
User Status	Active
User Color	#000000

Add User

Available Users

Sr.No.	Login ID	Name	Email Id	Mobile No	Role	Contact Type	Status		Color		
1	deepak	Deepak Patil	dspatil54@gmail.com	9970000824	Functional Administrator	CompanyHead	Active			De-Active	Edit
2	poonam	Poonam Gadge	mcpplindia@gmail.com	9923002061	Functional Administrator	SalesExecutive	Active		=CC00CC	De-Active	Edit

USER HEIRARCHY

- Create company hierarchy .

- Control viewing of documents through company hierarchy.

- Daily reporting on the basis of hierarchy.

- Flexible hierarchy creation.
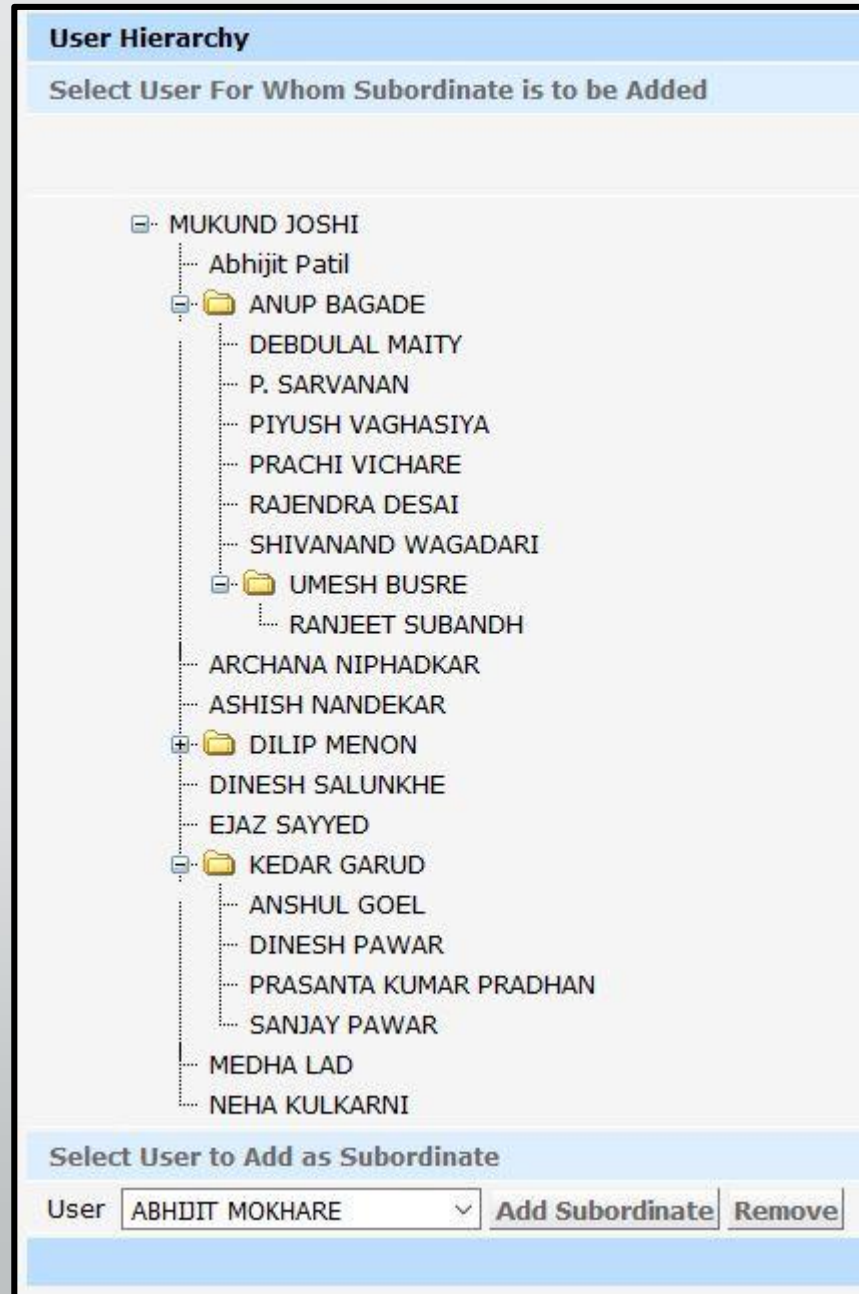
MODULES - IMPROSYS® CRM SOFTWARE

User-wise access of screens.

- Facility to define user-wise access to each and every screen in software.

User-wise log report.

User Log Report For The Period 24-Jun-2017 To 26-Jun-2017

Total Records Found : 82

Sr. No.	Login ID	User Name	Transaction Name	Date	Transaction Time	Transaction No.	Transaction Description	Status
56	Vijay	Vijaykumar Asawa	User Login	25/Jun/2017	04:27 PM	1	Login	Success
57	Vijay	Vijaykumar Asawa	Add Party	25/Jun/2017	05:08 PM	SILAHM001	New Party Added-SILAHM001	Success
58	Vijay	Vijaykumar Asawa	Add Party	25/Jun/2017	05:15 PM	NATAHM001	New Party Added-NATAHM001	Success
59	Vijay	Vijaykumar Asawa	User Login	25/Jun/2017	07:20 PM	1	Login	Success
60	Vijay	Vijaykumar Asawa	Add Party	25/Jun/2017	07:36 PM	ANJAHM001	New Party Added-ANJAHM001	Success
61	Anurag	Anurag Kaushal	User Login	26/Jun/2017	09:47 AM	1	Login	Success
62	Anurag	Anurag Kaushal	Add New	26/Jun/2017	10:10 AM	675	EQ/17-18/0128/47	Success
63	Anurag	Anurag Kaushal	Add New	26/Jun/2017	10:10 AM	674	EQ/17-18/0127/47	Success
64	Vijay	Vijaykumar Asawa	User Login	26/Jun/2017	10:18 AM	1	Login	Success
65	Anurag	Anurag Kaushal	User Login	26/Jun/2017	10:24 AM	1	Login	Success
66	Anurag	Anurag Kaushal	User Login	26/Jun/2017	10:25 AM	1	Login	Success
67	sumit	Sumitsing Rajput	User Login	26/Jun/2017	10:39 AM	1	Login	Success
68	Anurag	Anurag Kaushal	User Login	26/Jun/2017	10:53 AM	1	Login	Success
69	Raysing	Raysing Alugade	User Login	26/Jun/2017	11:05 AM	1	Login	Success
70	Raysing	Raysing Alugade	User Login	26/Jun/2017	11:08 AM	1	Login	Success
71	Raysing	Raysing Alugade	Status Update	26/Jun/2017	11:10 AM	Document No.	Status Updated	Success
72	Raysing	Raysing Alugade	Status Update	26/Jun/2017	11:11 AM	Document No.	Status Updated	Success
73	Vijay	Vijaykumar Asawa	User Login	26/Jun/2017	11:11 AM	1	Login	Success
74	Raysing	Raysing Alugade	Status Update	26/Jun/2017	11:12 AM	Document No.	Status Updated	Success
75	Raysing	Raysing Alugade	Status Update	26/Jun/2017	11:13 AM	Document No.	Status Updated	Success
76	Raysing	Raysing Alugade	Status Update	26/Jun/2017	11:15 AM	Document No.	Status Updated	Success
77	Vijay	Vijaykumar Asawa	Add Party	26/Jun/2017	11:15 AM	SHIAHM003	New Party Added-SHIAHM003	Success
78	Raysing	Raysing Alugade	Status Update	26/Jun/2017	11:15 AM	Document No.	Status Updated	Success
79	Raysing	Raysing Alugade	Status Update	26/Jun/2017	11:17 AM	Document No.	Status Updated	Success
80	Vijay	Vijaykumar Asawa	Add Party	26/Jun/2017	11:20 AM	RUDAHM001	New Party Added-RUDAHM001	Success
81	sumit	Sumitsing Rajput	User Login	26/Jun/2017	11:23 AM	1	Login	Success
82	Vijay	Vijaykumar Asawa	Add Party	26/Jun/2017	11:38 AM	DRAAHM002	New Party Added-DRAAHM002	Success

- User wise log report: View in-detail log report of each user, tracking of activities done in software with date and timestamp.

IMPROSYS ® CRM SOFTWARE

www.improsys.in

Tour / Visit Management

www.improsys.in

IMPROSYS ® CRM SOFTWARE

BioResource Biotech Pvt. Ltd.
18/1,Madhukunj Society,Panchavati Off Pashan Road,
Near Canara Bank,
Pune-411008
Maharashtra

Tel.:+91 20-25896379, 65290294, 65290318
Fax:+91 20 2589 6379
Email:customersupport@bioresourcebiotech.com,
Web Site: www.bioresourcebiotech.com

Total Records Found : 4

Daily Activity Report

Name: Snehal Dhake

Date	Name	Category Of Customer	Type Of Customer	Contact Person	Contact Number	Faculty	Type Of Call	Product Group Under Discussion	Demo/Presentations Done	Discussion Held	New Lead Received	Action to be taken from back office	Office Work Done	Kms	Rate/Km	Total
16/May/2017	Datar Genetics Limited	10	R & D Centre	Mr.Yogesh Pawar	02536604828		Purchase	Followup Calls	BioResource CRS,BioResource NO Life Sciences,		Discussion held for Aavanira services & customer is interested in DNA Sequencing. Also discussed with Agilent/Biorad profile for molecular bio related products. Currently not required anything.	YES	Dear TS team/Dipti - Please send quote for DNA Sequencing - Rs. ..../ sample will be 10 at time. Dear Customer support / snehal/sheetal - kindly send quote for taq dna polymerase from Agilent /biorad.	NO	0	0	0
22/May/2017	National Chemical Laboratory	09	CSIR (Council of Scientific & Industrial Research)	Dr. Kiran A. Kulkarni	02025902720	Biochemical Sciences Division	Cold Call	BioResource CRS,BioResource no Life Sciences,		discussed on CRS, agilent profile, customer is not happy with logistics, need to send material on proority.. intrested in DNA Sequencing, and picomax master mix	YES	Quote to be submitted for DNA Sequencing, and picomax master mix. 100U	NO	0	0	0
22/May/2017	National Chemical Laboratory	09	CSIR (Council of Scientific & Industrial Research)	Dr. H. V. Thulasiram	02025902478	Organic Chemistry	Hot call	BioResource Life Sciences,	no	presently he is working on new project, he has raised new pcr master mix req.	YES	Send quote for PCR master Mix	no	0	0	0
22/May/2017	National Chemical Laboratory	09	CSIR (Council of Scientific & Industrial Research)	Dr. Narendra Y. Kadoo	02025902724	Biochemical Sciences Division	Worm call	BioResource Life Sciences,	no	Sybr Green Requirement	YES	Send Quote	no	0	0	0

- Followup Calls-1
- Cold Call-1
- Hot call-1
- Worm call-1

- No. of visit done- 4
- No. of enq. generated- 4

Total KMs 0

Total 0

Tour wise Expenses Report

Name : Chandrapratap Singh

Tour No : TR/17-18/0005/41

Tour Name : Kolhapur Tour

Mode : Auto

From Date : 25/Apr/2017

To Date : 28/Apr/2017

No. of days : 3

Status : Draft

Sr.No.	Voucher No	Voucher Date	DATE	MODE	FROM	TO	Train/Bus Tkt	Bus Ticket	Boarding	Mobile	Incidential	Allowance	Travelling	Others	Remark	Document Link
1	CAEI000006	19/Apr/2017	11-Apr-2017	Bus	pune	kolhapur							500			Tickey from Pune to Kolhapur
			18-Apr-2017	Auto	nigdi	akurdi							50		driver refused to provide bill	
			24-Apr-2017	None					800						Boarding at Hotel Rasika KOllhapur	Hotel Tkt
			24-Apr-2017	Auto								300			Daily Allowance	
			24-Apr-2017	Auto	Kolhapur	Hotel							30			
			24-Apr-2017	Taxi	pune	kolhapur	570								Pune Railway Station to Kolhapur Railway Station	Train Ticket
				Total			570		800			300	580			

Advance: 0	Payment From customer : 0	Advance Total : 0
Expense Total : 2250	Balance Amount Recoverable/payble: 2250	

RS(IN WORDS) : Rupees Two Thousand Two Hundreds Fifty Only

Narration : 8

Chandrapratap Singh		
(Prepared By)	(Issued By)	(Approved By)

(ERP by Improsys www.improsys.in)

- Track daily expenses done against the tour.

IMPROSYS ® CRM SOFTWARE

- ✓ Daily visit report on emails.

- ✓ Visit vs. Expenses tracking

- ✓ Documents managed centrally.

- ✓ Sales person wise visit reports.

- ✓ Summarized visit reports.

- ✓ No preparing lengthy excel sheets for visit reporting .

- ✓ Track and control expenses.

- ✓ View documents at any moment of time.

- ✓ Analysis of Visits done vs. Leads generated.
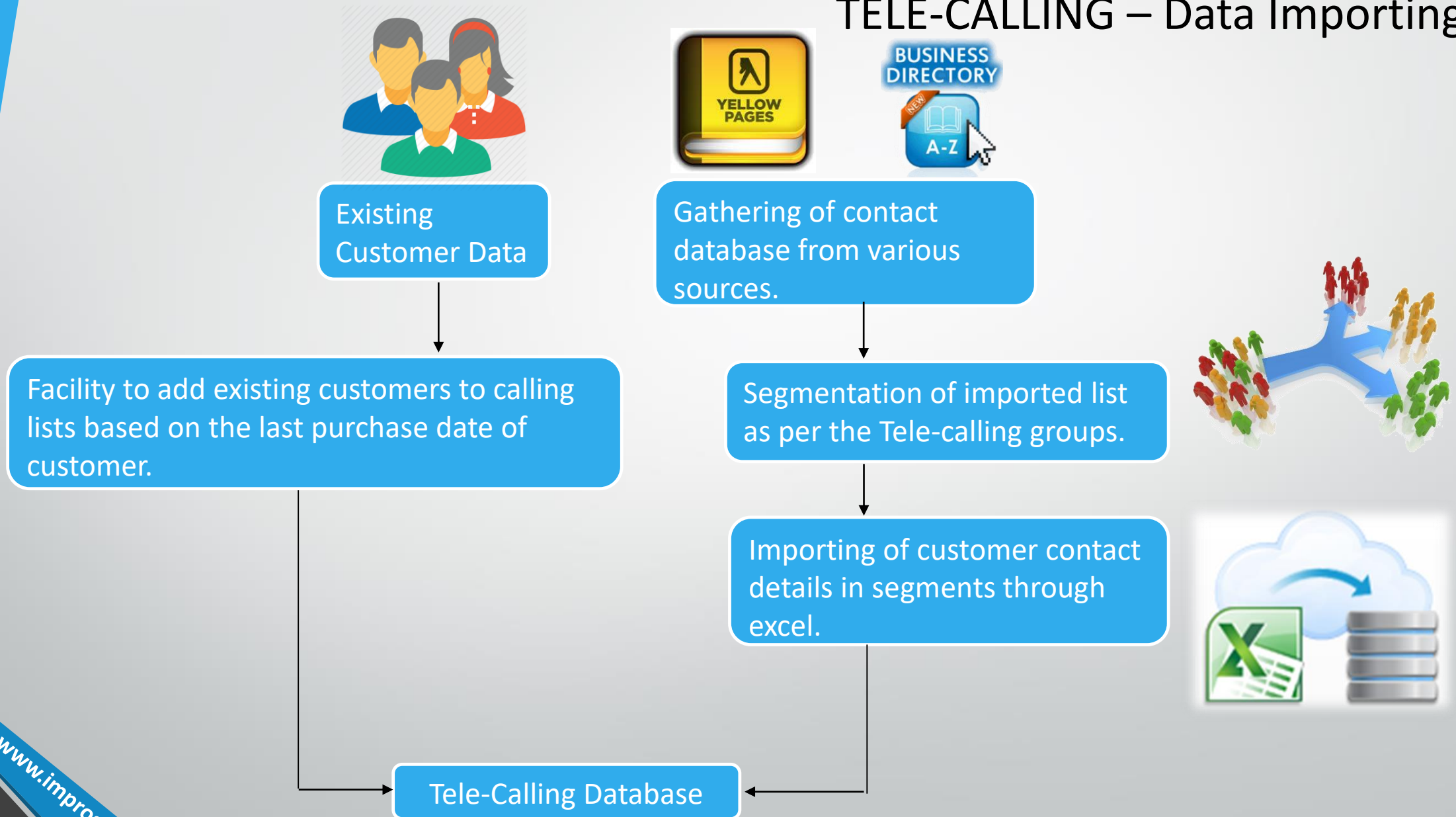
- ✓ Visit counts for overview of visit reporting.

TELE-CALLING

TELE-CALLING – Data Importing

Existing Customer Data

Gathering of contact database from various sources.

Facility to add existing customers to calling lists based on the last purchase date of customer.

Segmentation of imported list as per the Tele-calling groups.

Importing of customer contact details in segments through excel.

Tele-Calling Database
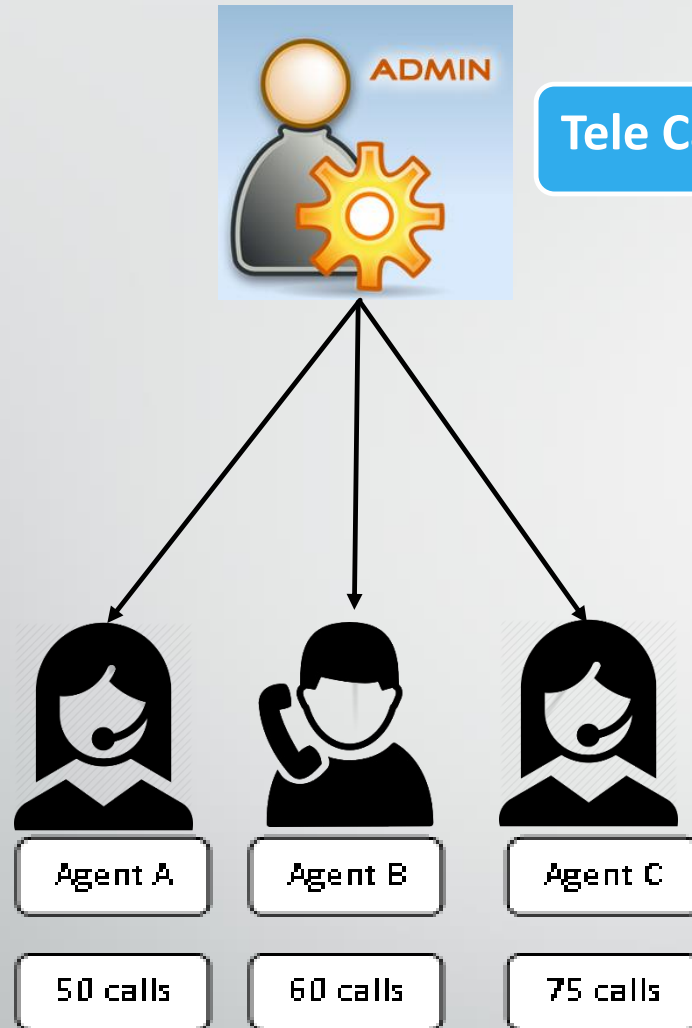
Tele Calls Planning by Team Admin

Agent A

Agent B

Agent C

50 calls

60 calls

75 calls

Select

a) Tele-Caller
b) Date of calling
c) Group of contacts
d) Number of contacts to call

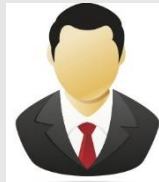Software selects randomly, the number of contacts from the group selected by the planner.

Confirmation & Allocation of calls to Tele-callers.

CALLING ADD-ONS and ANALYSIS

✓ **Call repeat facility** – Calls are repeated in calling list after set number of days based on various logics.

✓ **Integration with VoIP –** Integration of calling through software with call recording facility

✓ **Integration of payment gateway** – Carry out cash transactions with payment gateway

✓ Daily call reports

✓ Executive wise call reports

✓ Daily, weekly, monthly calls converted to leads sales person wise

✓ Daily, weekly, monthly calls generated into orders sales person wise

www.improsys.in

IMPROSYS ® CRM SOFTWARE

SMS / E-Marketing

www.improsys.in

Asses the response

Send sms / email to Client list.

Design SMS / Email Campaigns.

Import Target Clients' list from excel.

Lead Capturing

Lead entries directly into CRM from sources like **websites, android app, visits, etc.**

Lead Follow-Up

Lead follow-up dashboard for clear view of pending lead follow-ups. Prioritize your leads and drive them proactively using the dashboard.

Organize the Sales Process with Ease

For a change, use our filters to sort leads by users, products, sources, zones, contacts or any combination of the above for faster and efficient lead management.

www.improsys.in

Various filtering criteria for ease of operations

MODULES - IMPROSYS® CRM SOFTWARE
Lead Follow-up Dashboard

| Today's Pending |
| Last Week's Pending |
| Last Month's Pending |
| Last Year's Pending |
| In Progress |
| Draft |
| Cancelled |
| Closed |
| Approved |
| Rejected |

My Today's Pending Lead Documents

Remove Filter

Doc.No.	Created For	Status	Created By	Doc.Date	Due.Date	Pend days	Party Name				
Select	Select	Select	Select	Select	Select		Select				
LD/16-17/4364/28	Harshada Jagade	In Progress	Harshada Jagade	12/Dec/16	14/Dec/16	-1	Magnum VVM Group	☐	Show	Update	Convert-EQ
LD/16-17/4363/28	Harshada Jagade	In Progress	Harshada Jagade	12/Dec/16	15/Dec/16	-2	Lodha Mansukhlal Khushalchand	☐	Show	Update	Convert-EQ
LD/16-17/4355/28	Harshada Jagade	Draft	Harshada Jagade	12/Dec/16	12/Dec/16	1	Uday Instruments	☐	Show	Update	Convert-EQ
LD/16-17/4321/28	Harshada Jagade	Draft	Harshada Jagade	09/Dec/16	09/Dec/16	4	Omtex Healthwear Pvt Ltd	☐	Show	Update	Convert-EQ
LD/16-17/4319/28	Harshada Jagade	Draft	Harshada Jagade	08/Dec/16	08/Dec/16	5	Vaibhav Traders	☐	Show	Update	Convert-EQ
LD/16-17/4304/28	Harshada Jagade	In Progress	Harshada Jagade	07/Dec/16	10/Dec/16	3	Sadguru Enterprises	☐	Show	Update	Convert-EQ
LD/16-17/4302/28	Harshada Jagade	In Progress	Harshada Jagade	07/Dec/16	08/Dec/16	5	Subhadra Engineering Corporation	☐	Show	Update	Convert-EQ
LD/16-17/4300/28	Harshada Jagade	In Progress	Harshada Jagade	07/Dec/16	09/Dec/16	4	JMD Foods	☐	Show	Update	Convert-EQ
LD/16-17/4298/28	Harshada Jagade	In Progress	Harshada Jagade	07/Dec/16	14/Dec/16	-1	Pratik Machineries Pvt Ltd	☐	Show	Update	Convert-EQ
LD/16-17/4289/28	Harshada Jagade	In Progress	Harshada Jagade	07/Dec/16	08/Dec/16	5	Gopal Pressfab Pvt Ltd	☐	Show	Update	Convert-EQ
LD/16-17/4286/28	Harshada Jagade	In Progress	Harshada Jagade	07/Dec/16	07/Dec/16	6	ISC Udyog Ltd	☐	Show	Update	Convert-EQ
LD/16-17/4267/28	Harshada Jagade	In Progress	Harshada Jagade	05/Dec/16	06/Dec/16	7	JYOTI SALES CORPORATION	☐	Show	Update	Convert-EQ

Priority wise Task

| HIGH |
| MEDIUM |
| LOW |

Quick view of the document for reference purpose

Record all the follow-up discussions done with the customer

Option to convert lead directly into quotation with just a click of a button.

Quick view of the document for reference purpose

Set next follow-up details

Update document status as required.

Record all the discussions done with the customer

View previously completed follow-ups with the customers

Previous follow-up details

Current Document Details

Document	Enquiry	Document Status	Draft
Document Date	08/05/2017	Document Due Date	23/May/2017
Document No.	EQ/17-18/00001/49	Document Party Name	National Chemical Laboratory
Doc. Contact Person	Dr. Amitava Das	Doc. Sales Person	Snehal Dhake
Mobile No.	02025902385	Phone No.	
Email ID	rp.salunke@ncl.res.in	City	

Sr.No	Item Code	Item Description	Qty	Rate
1	28704	QIAquick Gel Extraction Kit (50)	2	0

Update Document Details

Next Followup Date	23/May/17	Next Follow Up By	Select
New Status	Draft	Expected Closing Date	
New Note Type	Final Remark	New Priority	High
New Note Description			

[Update] [Close]

Sr.No	Update Type	Notes Type	Notes Description	Update Date	Time	Due Date	Updated By
1	Follow Up	Final Remark	Send Quote	08/May/2017	06:47 PM	08/May/2017	Snehal Dhake
			Snehal: - today we received				

IMPROSYS ® CRM SOFTWARE

www.improsys.in

Date Wise Follow Up From-12-Jun-2017 TO -15-Jun-2017

Item Type:

Zone :

Sr.No	Doc. NO	Doc.Date	Doc. Type	Item type	Zone	Final Status	Sales Person	Party Name	Notes Type	Notes Description	Due Date	Updated By	Update Date	Update Time
1	45/00/44	12/Jun/2017	Sales OA	Sieger	Ahmedabad	Closed	Anurag Kaushal	Pashupati Cotspin LLP						
									1.) Final Remark	Despach date 13.06.2017	12/Jun/2017	satyendra	12/Jun/2017	12:42 PM
									2.) Other	Practise Entry	12/Jun/2017	Anurag	29/Jun/2017	06:23 PM
2	45/00/44	12/Jun/2017	Sales OA	Sieger	Ahmedabad	Closed	Satyendra Singh	Pashupati Cotspin LLP						
									1.) Final Remark	Despach date 13.06.2017	12/Jun/2017	satyendra	12/Jun/2017	12:42 PM
									2.) Other	Practise Entry	12/Jun/2017	Anurag	29/Jun/2017	06:23 PM
3	45/00/44	12/Jun/2017	Sales OA	Sieger	Ahmedabad	Closed	Sumitsing Rajput	Pashupati Cotspin LLP						
									1.) Final Remark	Despach date 13.06.2017	12/Jun/2017	satyendra	12/Jun/2017	12:42 PM
									2.) Other	Practise Entry	12/Jun/2017	Anurag	29/Jun/2017	06:23 PM
4	SE/0036 /17-18/46	08/Jun/2017	Principal Service	Sieger	Ahmedabad	Closed	Anurag Kaushal	Raja Industries						
									1.) Final Remark	MOM attached	09/Jun/2017	sumit	14/Jun/2017	08:12 AM
5	SE/0036 /17-18/46	08/Jun/2017	Principal Service	Sieger	Ahmedabad	Closed	Satyendra Singh	Raja Industries						
									1.) Final Remark	MOM attached	09/Jun/2017	sumit	14/Jun/2017	08:12 AM
6	SE/0036 /17-18/46	08/Jun/2017	Principal Service	Sieger	Ahmedabad	Closed	Sumitsing Rajput	Raja Industries						
									1.) Final Remark	MOM attached	09/Jun/2017	sumit	14/Jun/2017	08:12 AM
7	SE/0037 /17-18/46	08/Jun/2017	Principal Service	Sieger	Ahmedabad	Closed	Anurag Kaushal	Pashupati Cotspin LLP						
									1.) Final Remark	YCP pre installation visit completed	08/Jun/2017	sumit	09/Jun/2017	06:09 PM
									2.) Final Remark	MOM attached	08/Jun/2017	sumit	14/Jun/2017	08:16 AM

LEAD ANALYSIS

- ✓ Product wise leads report

- ✓ Source wise leads generated (Emails, SMS, Visits, Exhibitions, etc.)

- ✓ Area wise, Zone wise leads generated.

- ✓ Sales person wise leads generated.

- ✓ Summarized leads reports.

- ✓ Pending Leads analysis

- ✓ Leads generated vs Quotation submitted analysis

- ✓ Review next due leads for follow up.

- ✓ Customer wise follow up analysis.

- ✓ Sales person wise follow up analysis.

QUOTATION MANAGEMENT

- A quote can help the prospective buyer when deciding which company to use, and which services they are looking for.

STEP 1 : Select customer name with advanced google search provided from the master data.

Customer Details

Quotation No. : QT/16-17/0052/00/00

Doc Type: Domestic Product QT

Party Name: s

Address: St. Marthas Hospital
Sharat Kaushik
Shanti Hospital Research Centre

STEP 2 : Select the set of customisable self-defined terms and conditions from masters

Followup Due Date: 13-Dec-2016

Tax Category: Select
Select
Quotation 2% CST
Quotation 13.5% MVAT

Priority

STEP 3 : Take reference of previous quotes or convert enquiries to reduce errors and avoid manual tasks.

Against ○ No Ref ⦿ Enquiry ○ Previous Quotation

STEP 4 : Input / edit the product details such as quantity, Price, specifications, etc. as per the requirement.

IMPROSYS ® CRM SOFTWARE

www.improsys.in

- **Auto Email Quotes in PDF to all Customer contacts & Internal sales team (Sales Executive, Head, GM).**

- **Attach discussion references, catalogues, data sheets.**

- **Customizable quotation format to meet your needs.**

Quotation

DATE: 28-Sep-2015
OFFER No. QT/15-16/0015

improsys®
improvement in systems

To,
Improsys
BR-1 427, ,Jai Ganesh Vision,
Akurdi,Pune,411035
Maharashtra,India
Email:

Kind Attention:

Subject: Quotation For Mechanical Seals make Products

Reference:
Thank you very much for your valuable enquiry.As per our discussion we are enclosing herewith our offer as below.

Sr	Description	Qty	Unit	Unit Price	Disc %	Disc.Unit Price	Net Amount (in Rs)
1	S60000373700:-Mechanical Seal:MOC:BQ1VMG,Drg. No.:60-G911-R1,Drg. Rev. No.:0,Part Size:A3,BIN no.:MS-153,	500	Nos.	150	0.00	150.00	75000.00
	Total	**500**					**75000.00**

Attachment:

HP Serice Center List.docx
sealmatic item master.msg

Total Amount in word : Rupees Seventy Five Thousand Only   Net Payable: 75000.0000
Terms and Conditions :
  1. **Special Notes :-**Validity 60 days.
  2. **Supply Condition :-**Duly packed
  3. **Freight Term :-**Extra applicable

Thanks & Regards,
For IMPROSYS   ,

Admin
Mob:

IMPROSYS ® CRM SOFTWARE

www.improsys.in

QUOTATION FOLLOW UP

	Today's Pending
	Last Week's Pending
	Last Month's Pending
	Last Year's Pending
	In Progress
	Draft
	Cancelled
	Closed
	Approved
	Rejected

Status Pending

Priority wise

| HIGH |
| MEDIUM |
| LOW |

Remove Filter — My Today's Pending Quotation Documents — Go

Doc.No.	Created For	Status	Created By	Doc.Date	Due.Date	Last Update	Pend days	Party Name				Status
Select	Select	Select	Select	Select	Select	Select		Select				
SQT/16-17/0009/04	Amey Bhavsar	In Progress	Raviraj Deshpande	22/Jun/16	22/Jul/16	20/Jul/16	95	Technofab	☐	Show	Update	✉
SQT/16-17/0008/25	Amey Bhavsar	In Progress	Akshay Dongare	07/Jun/16	16/Jul/16	07/Jun/16	101	Sunteck	☐	Show	Update	✉
SEQT/16-17/0016/25	Amey Bhavsar	In Progress	Akshay Dongare	07/Jun/16	23/Jun/16	07/Jun/16	124	Canply	☐	Show	Update	✉
SEQT/16-17/0015/25	Amey Bhavsar	In Progress	Akshay Dongare	07/Jun/16	28/Jun/16	07/Jun/16	119	Nucleas	☐	Show	Update	✉
SEQT/16-17/0008/25	Amey Bhavsar	In Progress	Akshay Dongare	18/May/16	20/Jun/16	18/May/16	127	RIJ Engineering Pvt. Ltd.	☐	Show	Update	✉
SEQT/16-17/0004/25	Amey Bhavsar	In Progress	Akshay Dongare	06/May/16	22/Jun/16	07/May/16	125	Sandvik Coromant India	☐	Show	Update	✉
SEQT/16-17/0003/25	Amey Bhavsar	In Progress	Akshay Dongare	06/May/16	26/Jun/16	09/May/16	121	FCG Power Industries Pvt Ltd	☐	Show	Update	✉
SEQT/16-17/0002/25	Amey Bhavsar	In Progress	Akshay Dongare	06/May/16	28/Jun/16	09/May/16	119	Centpro Engineering Pvt. Ltd.	☐	Show	Update	✉
SQT/16-17/0003/25	Amey Bhavsar	In Progress	Akshay Dongare	07/Apr/16	31/May/16	28/Apr/16	147	Sealmech Trading	☐	Show	Update	✉
SQT/15-16/0127/25	Amey Bhavsar	In Progress	Akshay Dongare	23/Mar/16	15/Jun/16	24/Mar/16	132	XPRO INDIA LIMITED	☐	Show	Update	✉
SQT/15-16/0119/25	Amey Bhavsar	In Progress	Akshay Dongare	05/Mar/16	15/Jun/16	05/Mar/16	132	VEKARIA	☐	Show	Update	✉

Get detailed information regarding current status of quotations with a glance at follow-up dashboard.

IMPROSYS ® CRM SOFTWARE

www.improsys.in

IMPROSYS ® CRM SOFTWARE

www.improsys.in

Update Document Details

| Document Code | Quotation | | Document No. | SEQT/16-17/0001/25 |

Party Name   Degchis Catering Services

Document Date   28/Apr/16   Document Due Date   26/May/16

Document Status   In Progress   Priority   High

Note Type   Final Remark

Note Description

Quotation Follow-up History

Show Details

Sr.No	Update Type	Notes Type	Notes Description	Update Date	Time	Due Date	
1	Follow Up	Feedback From Customer	ali sirs cellis with ganesh sir he said ali is out of	05/May/2016	11:10 AM	26/May/2016	Delete
2	Follow Up	Feedback From Customer	called but client was busy	30/Apr/2016	10:53 AM	30/Apr/2016	Delete
3	Follow Up	Other	called client yday he said he will check the revised	28/Apr/2016	03:56 PM	29/Apr/2016	Delete

Update   Close

QUOTATION ANALYSIS

- Product wise quotation report

- Party wise reports of Quotes

- Sales Person wise quotation reports.

- Daily, Weekly, Monthly, Yearly quotation reports.

- Summarized quotation reports.

- Pending Quotation analysis

- Quotation submitted vs Sales order converted analysis

- Review next due Quotations for follow up.

- Customer wise follow up analysis.

- Sales person wise follow up analysis.

MODULES - IMPROSYS® CRM SOFTWARE

QUOTATION VS ORDER ANALYSIS

Sr. No	Quote Owner	Quote No	Date of Proposal	Item Code	QT Amt.	QT Status	Expected Closing Date	OA Date	OA Amt.	Lost Amt.	Order No	Cust. Po No
1	Neeta J	SQT/16-17/2314/30	11-05-16	TSS-MU	8925	Closed	20-05-16	20-06-16	8000	925	SO/16-17/1854/30	PO/15-16/0235
2	Amey B	SQT/16-17/2314/30	09-06-16	TSS-MU	8925	In-Progress	13-06-16					
4	Akash D	SQT/16-17/2312/30	10-08-16	TSS-MU	8925	Closed	23-08-16	19-09-16	8925	0	SO/16-17/1852/30	POP/SA/2568
5	Ravi D	SQT/16-17/2312/30	12-08-16	TSS-MU	8925	Closed	27-08-16	19-09-16	9000	0	SO/16-17/1852/30	
6	Neeta J	SQT/16-17/2311/30	14-12-16	TSS-SU	2975	Closed	28-12-16	28-12-16	2975	0	SO/16-17/1851/30	
7	Akash K	SQT/16-17/2310/27	13-12-16	SER	2500	Closed	28-12-16	28-12-16	2000	500	SO/16-17/1850/27	

www.improsys.in

TASK MANAGEMENT

A step closer to digitalisation of your task diary and task management.

TASK MANAGEMENT – Progress at a glance

DRAFT

IN-PROGRESS

HOLD

CONTINUE

CANCELLED

COMPLETED

Activity | **History**

Monday		Tuesday
	30	Dec
viraj----In-Progress		abhijeet----In-Pro
viraj----In-Progress		nikhil----In-Progre
viraj----In-Progress		rohit----In-Progres
viraj----In-Progress		raviraj--Travel + V
viraj--Item Master		
viraj----In-Progress		

CALENDAR VIEW
Intuitive calendar view for better task management
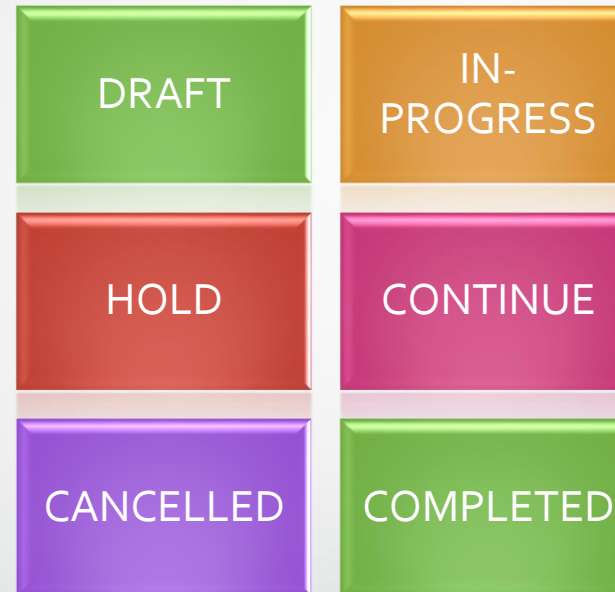
TASK STATUS MONITORING
Update tasks and provide suitable status to them.

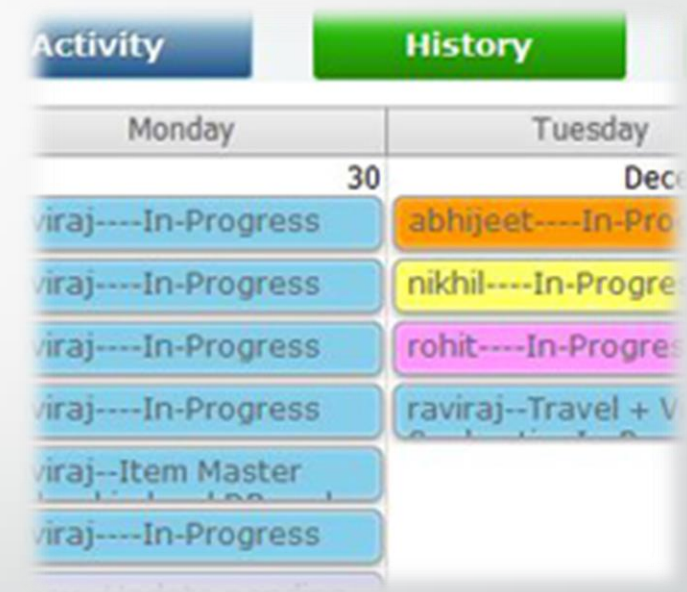**ACTIVITY HISTORY**
Every activity in show my task is captured and recorded.

With tasks, task calendars, dashboard and task activity history log, see progress of any task without scheduling a meeting or sending an email.

Organize, assign and prioritize tasks.

Timely reminders to make employees more productive.

Manage tasks more effectively.

Communicate tasks with employees and take follow up.

Share and manage documents centrally.

Get instant reports for all employees on a single screen.

Monitor the work completion and balance work.

www.improsys.in

MODULES - IMPROSYS® CRM SOFTWARE

TASK MANAGEMENT – Benefits
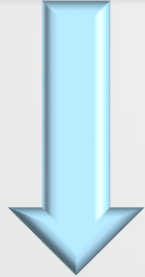
- **Increase employee and employer satisfaction.**

- **Improve productivity of workforce.**

- **Save time on routine work.**

- **Faster delivery of desired tasks.**

- **Boost management effectiveness.**

- **Minimize employee's idle time.**

- **Ease communication between colleagues.**

TASK MANAGEMENT – Daily reports

DAILY REPORTS ON EMAIL – Monitoring daily completed and not completed work.

IMPROSYS ® CRM SOFTWARE

www.improsys.in

TASK MANAGEMENT – Graphical Analysis

Graphical Task Reports: Get graphical reports of tasks, party wise, user wise, periodic, etc.

SALES TARGET

www.improsys.in

FEATURES- TARGET MANAGEMENT

Assign Sales Targets .

- Break down targets by salesperson and territory to gain insights about your team's performance.
- Make better forecasts by accounting for completed sales, current targets.

Track sales performance. Identify the achievers.

- Use the target summary to identify your star performers and determine the strength of each sales team based on the targets they achieved.
- Keep your MVPs motivated by setting higher targets for the next quarter.
- Customize your targets based on the criteria you want, based on region, hierarchy.

May it be City, Area or Zone you can create targets for teams through multiple choices.

Targets can be allocated on quarterly basis. Allocate targets on basis of previous performances.

Allot your targets according to product categories, groups, etc.

Built-in user hierarchy for better understanding and allocation of targets.

Select Year : 2016-17

Select Item Category	Select Filter	Select User	Quarterly Target

Frocks

Injection

Nutro Active

Supercrop

Milklife

Laser Receivers

DC-DC converters

Spice Caps

Mashroom Flip Top Cap

ERP

Area Wise

Area Wise
City Wise
Zone Wise
Ahmedabad

AP/Telangana

Aurangabad

Bihar

Central Mumbai

Gwalior

Haryana

Indore & Bhopal

Selected User : PAWAN

- MUKUND
  - ANUP
    - ARCHANA
    - ASHISH
  - DILIP
    - GNANARAJ
    - PAWAN
    - SAMPATH
    - SIDDHARTHA
  - UNMESH
    - PRIT
    - SANTOSH
  - DINESH
  - EJAZ
  - KEDAR
  - MAHESH
  - MEDHA
  - NEHA

Spice Caps >> West Bengal >> PAWAN

Year	Quarter	Target Allocated	Target Achieved	Target Achieved(%)	Add Target	
2016-17	1st	250000	0.00	0	0.00	Add
2016-17	2nd	350000	0.00	0	0.00	Add
2016-17	3rd	200000	0.00	0	0.00	Add
2016-17	4th	275000	0.00	0	0.00	Add

REPORTS- TARGET MANAGEMENT

IMPROSYS ® CRM SOFTWARE

Summary sales target report

SrNo	User	Item Category	Zone/Area/City	Year	Quarter	Target Allocated	Target Achieved	Backlog	Target Achieved(%)
1	SANJAY PAWAR	Karl Kaps	Zone : Maharashtra	2016-17					
					1st	900000.00	0.00	900000.00	0.00 %
					2nd	900000.00	0.00	900000.00	0.00 %
					3rd	900000.00	0.00	900000.00	0.00 %
					4th	900000.00	0.00	900000.00	0.00 %
2	SANJAY PAWAR	Bien Air ENT	Zone : Maharashtra	2016-17					
					1st	600000.00	0.00	600000.00	0.00 %
					2nd	1200000.00	5148.08	1194851.92	0.43 %
					3rd	600000.00	0.00	600000.00	0.00 %
					4th	1215000.00	0.00	1215000.00	0.00 %
3	SANJAY PAWAR	Bien Air Neuro	Zone : Maharashtra	2016-17					
					1st	0.00	0.00	0.00	0.00 %
					2nd	800000.00	0.00	800000.00	0.00 %
					3rd	0.00	160.16	-160.16	0.00 %
					4th	800000.00	0.00	800000.00	0.00 %
4	SANJAY PAWAR	Sutter ENT	Zone : Maharashtra	2016-17					
					1st	600000.00	0.00	600000.00	0.00 %
					2nd	600000.00	3083.36	596916.64	0.51 %
					3rd	600000.00	0.00	600000.00	0.00 %
					4th	600000.00	0.00	600000.00	0.00 %

Accurate insights through reports.

Visualize targets and achievements by territory through reports. Compare sales from the current quarter with the previous one, and set more realistic targets for the future.
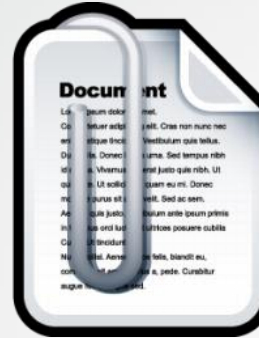
www.improsys.in

INVOICING / BILLING

MODULES - IMPROSYS® CRM SOFTWARE

FEATURES - INVOICE MANAGEMENT

Create and Manage Invoices.
Invoices can be created and sent/scheduled online to clients. The web based invoice software manages all invoices centrally.

Does all the Hard Work
Improsys software will do all the work for you. From calculating to formatting and printing, even delivering invoices to your customers.

Tax, Retail & Excise Invoices
Make new financial documents like Excise, Service Tax & VAT invoices which are optimized to be compliant with Indian law.

Issue Proforma Invoices
Declare your commitment to provide products or services to a buyer at a certain price with the Proforma Invoice option.

Quick and detailed reports
Improsys software doesn't just help you create invoices but also offers comprehensive reports.

GST Compliant
GST compliance software, auto addition of taxes according to state. GST reports state wise, tax code wise, periodic, etc.

PAYMENT FOLLOWUP DASHBOARD

IMPROSYS ® CRM SOFTWARE

PAYMENT FOLLOW UP

Payment Followup

Select Top [5 ▾]

Sr No	Customer Name	Area	O/S Amount	Todays O/S Amount	1-7 Days O/S	8-15 Days O/S	16-30 Days	More Than 30 Days
1	Ferrero India Pvt Ltd	Baramati	6468754	0	3234377	0	2156251	1078125
2	Reward Constructions Pvt. Ltd.	Aurangabad	3103000	0	0	0	0	3103000
3	Shapoorji Pallonji & Co. Pvt Ltd	Pune	2237679	0	0	2237679	0	0
4	Zamil Steel Bldg. India Pvt. Ltd.	Dubai	1307175	0	0	0	0	1307175
5	M. B. Enterprise	Mumbai	1149850	0	0	0	0	1149850
6	Fiat India Automobile Private Limited	Pune	967500	0	0	0	0	967500
7	NYATI ENGINEERS & CONSULTANTS		436679	436679	0	0	0	0
8	Nestle India Ltd		125036	0	0	0	0	125036
9	IndoSpace Industrial Parks Pvt Ltd		106752	0	0	0	0	106752
10	Takenaka India Pvt Ltd		40000	0	40000	0	0	0

Goto Page [1 ▾] First Previous Next Last

Detailed client-wise invoice reports with online billing software for better understanding of outstanding and invoice aging.

GST INVOICE FORMAT

☐ Original FOR Buyer ☐ Duplicate FOR Transporter ☐ TRIPLICATE FOR ASSESSEE

Piotex Textech Pvt. Ltd.
Malhar, Plot No. 11/2,Survey No.126 Walhekarwadi,Near Atharv Park,
Chinchwad
Pune-411033
Maharashtra,India State Code - 27
Tel :020-27657025
Email:ho@piotex.in

TAX INVOICE

Name & address of consignee
To,

Mafatlal Industries Limited
Vejalpor Road,

Navsari-396445, State Code - 24
Gujarat India
Customer E C C No if any:
Category Of Consignee:

Invoice No:TI/2017-18/0032

Date:08-Mar-2017

Customer PO No:

Date:

Our D.C. No:DC/253/A-2

Date:08/Jan/2017

Sr.No	Description	Quantity	UOM	Rate per Unit	Dis	Taxable Amt	HSN No	SGST %	SGST	CGST %	CGST	IGST %	IGST	Total Amount Rs.
1	Cylinder Wire AC2040X01740-D+(52) **Part No** :SPGGERCW002 (10)	2	Rolls	15000.00	0.00	30000.00	84483100	0.00	0.00	0.00	0.00	18.00	5400.00	35400.00
2	Doffer Wire AD4030RX02090D-1(32) **Part No** :SPGGERDW003 (10)	3	Rolls	20914.00	0.00	62742.00	84483100	0.00	0.00	0.00	0.00	18.00	11293.56	74035.56
3	Cylinder Wire AC2035TX01740-D+(52) **Part No** :SPGGERCW006 (10)	5	Rolls	78366.00	0.00	391830.00	84483100	0.00	0.00	0.00	0.00	18.00	70529.40	462359.40
		Total			0.00	484572.00			0.00		0.00		87222.96	571794.96

Amount in Words : Rupees Five Lakh Seventy One Thousand Seven Hundreds Ninety Five Only.

Date of Issue : 03/Aug/2017   Time of Issue :   11:30:05

GST TIN No. 27AAGCP8120P1ZX

FSSAI No. 10114028000300

Inter State Goods and Service Tax :18%	70529.40
Total Tax Amount:	70529.40
Grand Total:	462359.40
Round Off(-)::	0.40
Net Payable(Round Off):	462359.00

For Piotex Textech Pvt. Ltd.

Signature of Managing Director
or his power of attorney holder

Made By: admin

(ERP 2010 www.imprsys.in)

GST INVOICE
FORMAT

IMPROSYS ® CRM SOFTWARE

IMPROSYS ® CRM SOFTWARE

www.improsys.in

AFTER SALES SERVICE

Improsys After sales service management helps you to manage service operations in an effective with almost Zero deficiency.

It connects seamlessly between all the elements of your service operations.

Increase service quality and increase confidence on customers.

Streamline your customer support process.

Manage your all complaints to 100% precision and monitor their status towards making communication smooth with every customer.
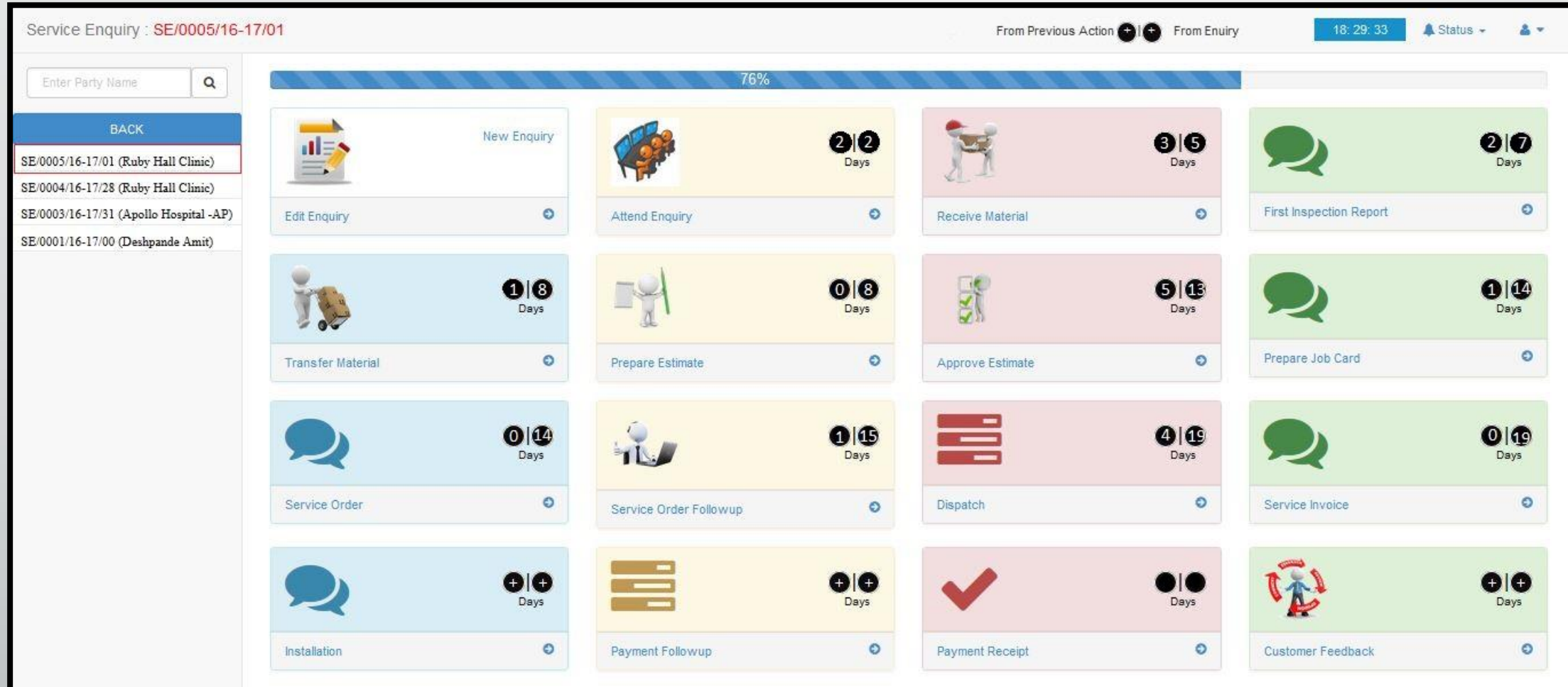
Service Dashboard brings the **decision making dashboard**. Your service manager or in-charge can make quick decision about a customer or a service ticket and direct his force well on time to take remedial action in the fastest way possible.

Track progress of a enquiry instantly with the progress bar

MODULES - IMPROSYS® CRM SOFTWARE
FEATURES - AFTER SALES SERVICE

Service Enquiry : SE/0005/16-17/01

From Enuiry ➕ | ➕ From Previous Action   16: 04: 39   🔔 Status ▾   👤 ▾

Enter Party Name 🔍

BACK

SE/0005/16-17/01 (Ruby Hall Clinic)
SE/0004/16-17/28 (Ruby Hall Clinic)
SE/0003/16-17/31 (Apollo Hospital -AP)
SE/0001/16-17/00 (Deshpande Amit)

New Enquiry

Edit Enquiry ➡

Attend Enquiry ➡   ❷|❹ Days

Receive Material ➡   0|0 Days

First Inspection Report ➡   0|0 Days

76%

DRAFT   2
IN-PROGRESS   3
CLOSED   1
Enquiry Status

View all pending service enquiries

View status wise enquiries

From Enuiry ➕ | ➕ From Previous Action

Attend Enquiry ➡   0|0 Days

No. of days required to carry out the action from it's previous action

No. of days required to carry out the action from the date of enquiry

Get notified if a process is delayed over it's defined limit.

MODULES - IMPROSYS® CRM SOFTWARE
FEATURES - AFTER SALES SERVICE

IMPROSYS ® CRM SOFTWARE

Service Complaint Booking within minutes

Search products by serial no. or from the list of previously sold products

Quick view of warranty date of the product for quick decision of service type

SMS / Email Notification to customer

Create an appointment date for the service person.
SMS/ Email Notification to service executive

New Enquiry Entry   From Enuiry ⊕ | ⊕ From Previous Action   15: 28: 18   🔔 Status ▾   👤 ▾

Party Name: Ruby Hall Clinic   Mobile : 986666666   Due Date : 24-Dec-2016

Address : Station Road, Pune,,   City : Pune,Maharashtra   Email ID :

Complaint Details

Serial No: Product: DEMO SET OSSEOUNO SHAV   Warrenty Date: 27/Sep/2017

Customer Complaint Details: Complaint Details   ☑ Send Alert to Customer

Save

Alert Complaint

Customer representative: Dr. Kokil   Contact Number: 986666666   Email ID: Email ID

Service Engineer : PIYUSH VAGHASIYA   Priority: A   Appointment Date: 15-Dec-2016

Send Alert

www.improsys.in

MODULES - IMPROSYS® CRM SOFTWARE
FEATURES - AFTER SALES SERVICE

- Manage all aspects of service and repair at an affordable cost based on your service management needs.

- Service History details of a particular customer.

- Client and Equipment Service Management and History.

- Generate reports on all aspects of service management.

- Evaluate each service engineers performance.

- Sitting in one place, monitoring and generating various reports.

- Spare Parts replaced details.

MODULES - IMPROSYS® CRM SOFTWARE

Do not leave any enquiry un-attended

Reduce Operational and Material Costs

Effective communication with customer

Deliver Excellent Customer Service

Meet customer expectations

Customer Feedback Entry for performance appraisals

IMPROSYS ® CRM SOFTWARE
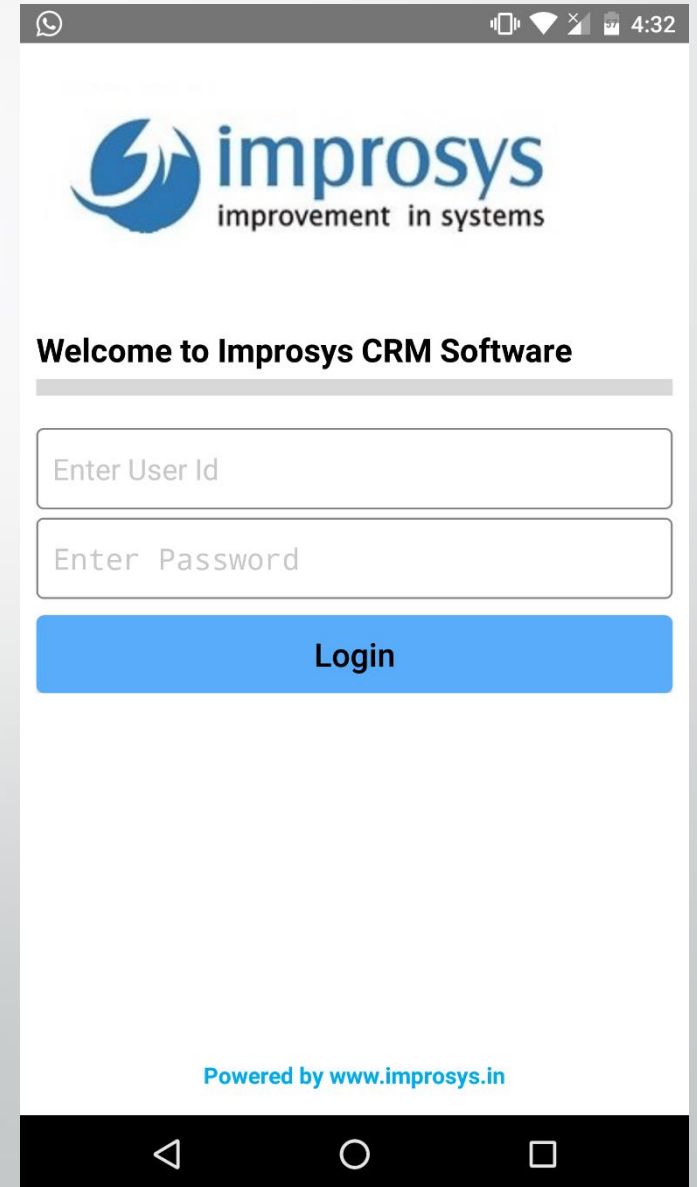
www.improsys.in

Get Connected

With the Improsys Mobile App

Our mobile CRM app ensures your team is always in touch when on the go. From your smartphone, Improsys Mobile provides you with quick access to your data no matter where you are. Overseeing your business and staying in touch with your customers and prospects has never been easier.

www.improsys.in

IMPROSYS ® CRM SOFTWARE

User Friendly Design

Clean and simple.

The straightforward, intuitive design of our mobile app ensures that your users will quickly learn how to navigate and use the app.

www.improsys.in

IMPROSYS ® CRM SOFTWARE

Manage your Pipeline

and stay in the loop.

Getting sales professionals to update their follow-ups is often easier said than done. Our mobile app makes it easy for sales reps to keep everyone updated so you'll always know where the opportunities lie. Your sales pipeline has never been so manageable.
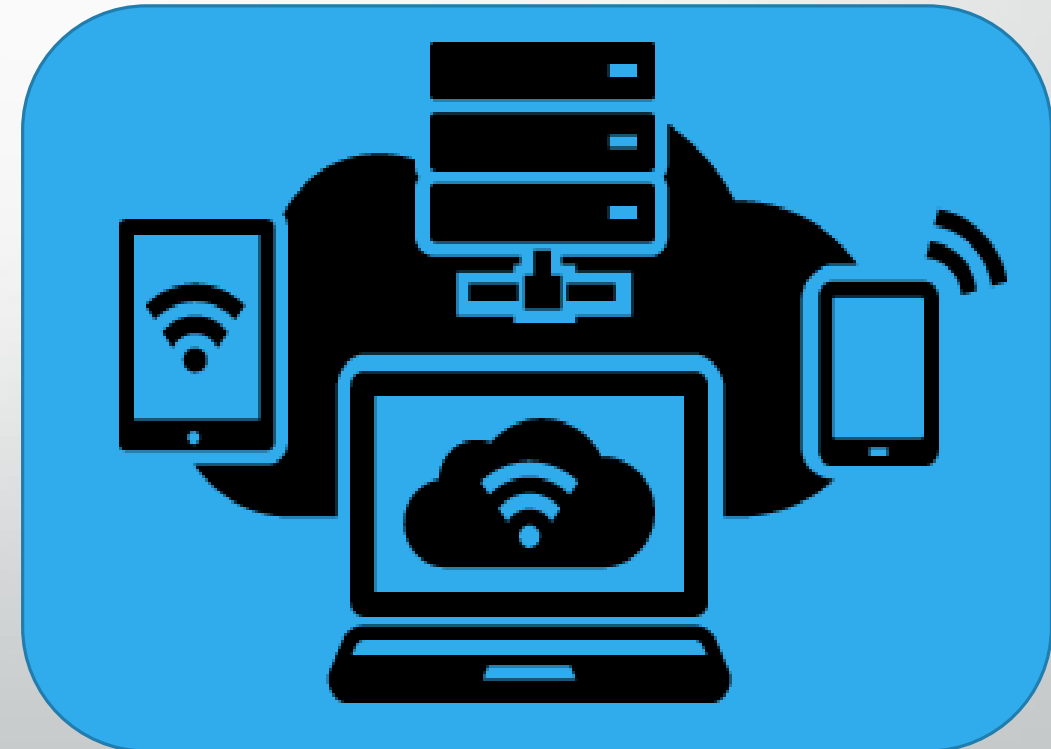
www.improsys.in

INSTALLATION

IMPROSYS ® CRM SOFTWARE

Improsys CRM Installation Services

Improsys lets you select the CRM software option that's right for you. Choose between Hosted CRM or On-Premise solutions, and have the freedom to switch if your business requirements or preferences change.

CRM hosted on Improsys server

- Data is stored in your own private & secure database
- Get up and running quickly
- Fast, reliable, scalable environment hosted by our servers.
- No extra hardware or IT investments required
- No CRM system maintenance or backup costs
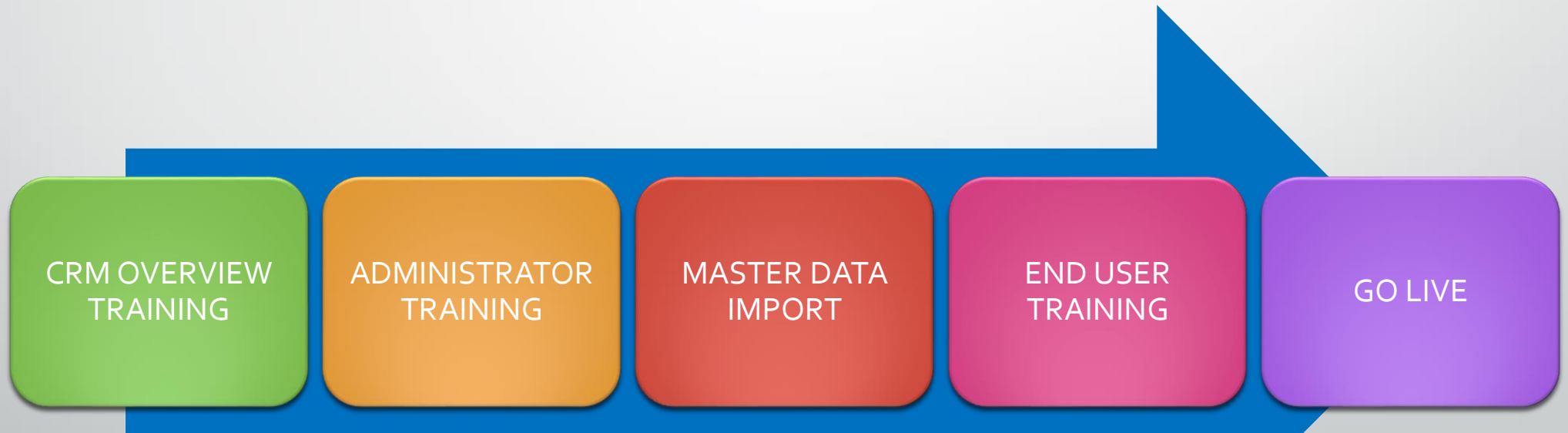- No CRM software installation or maintenance

www.improsys.in

Improsys CRM Implementation Process

Our experts will guide you through your CRM implementation to ensure your goals and timelines are met and your business processes are properly defined and captured in Improsys CRM software.

Your core team will receive training and advice in each step of the process. **Typically, this includes:**

CRM OVERVIEW TRAINING

ADMINISTRATOR TRAINING

MASTER DATA IMPORT

END USER TRAINING

GO LIVE

IMPROSYS® CRM SOFTWARE
CRM SERVICES - IMPLEMENTATION

CRM OPS REVIEW

Are you getting the most out of your CRM software? Let our experts conduct an operation review to maximize your usage and improve sales & marketing efforts.

PROJECT MANAGEMENT

Our project managers are available to guide you through your CRM implementation and ensure all necessary components are in place for a seamless roll-out.

DATA IMPORTING

If you need to bring master data into Improsys CRM, our professionals can help perform the importing to ensure data is imported properly.

CRM TRAINING

Our team can provide customized, one-on-one CRM training on advanced topics such as Workflow, Reports, Incidents, Campaign Management and more.

CUSTOMIZATIONS

Our CRM team can help tailor your implementation by making changes to the software by adding screens and custom logic to the system.

UPGRADES

Whether your CRM solution is hosted or on-premise, we can provide you with the road map, technical consulting and training to leverage product enhancements.

www.improsys.in

About Us

Laxmikant Kathare

Improsys is founded by first generation entrepreneur **Mr. Laxmikant Kathare**. He is qualified Production Engineering graduate with post graduation in Systems Management from Mumbai University.

He has rich experience in managing change for Improvements in challenging situations. "The perfect solution provider," says Improsys founder Mr. Laxmikant, "would understand exactly what you mean and give back exactly what you want." Given the state of technology today, that's a far-reaching vision requiring research, development and innovation to realize. Improsys is committed to blazing that trail. Improsys 's goal is to provide solutions to problems".

Improsys Team

Raviraj Deshpande

Abhijeet Harale

Rohit Jadhav

"To consistently create value for our stakeholders, by providing improvement solutions in systems which enable our customers to achieve excellence and sustainable competitive edge".

Our Goal is to:

Increase Customer satisfaction.

Increase utilization of resources.

Improve performance of employees.

Improve level of quality standards in all functional areas.

Tower of success is built together.

Continuous improvement of Client's organizational prosperity, Client's satisfaction, Returns to Client's investors & shareholders.

Winning a customer smile is the best business strategy

WE'RE ALWAYS HAPPY TO HELP
Get in touch with us today!

Your problem is our business opportunity.

Improsys

A-29, A Wing,

Ground Floor, Jai Ganesh Vision,

Near Fame Theatre, Akurdi,

Pune : 411035.

Phone : 020-46700036

Mobile : 9922066745

Email : info@improsys.in

Website : www.improsystechnology.com

improsys
improvement in systems

Cashflow
Quality
Productivity
Value
Delivery

IMPROVE

www.improsys.in

www.improsys.in

YOU BET!

NO PROBLEM

SURE WE CAN!

SERVICE IS OUR SPECIALTY

YOU WANT IT WE GOT IT!

WHAT SIZE WHAT COLOR AND HOW MANY?

JUST ASK ALREADY