

CUSTOMER RELATIONSHIP MANAGEMENT

Powered by:
Excelanto Cloud Systems Pvt Ltd



OVERVIEW OF CRM

- **Customer Relationship Management** (also known as CRM) is a widely implemented strategy for managing a company's interactions with customers , clients and sales prospects.
- It involves using technology to organize, automate, and synchronize business process principally sales activities, but also those for marketing, customer service, and technical support.
- However, CRM is not just a software package or solution, it is an overall concept beyond software or a specific CRM platform or provider.



MODULES OF CRM

- CRM
 - Sales & Marketing
 - Analysis Reporting
 - Service
 - Relation Management
 - ERP & Finance



FLOW DIAGRAM OF CRM



SCREENS OF CRM

BY

Excelanto Cloud Systems Pvt Ltd



LOGIN

Admin Login

Username:

Password:



EMPLOYEE REGISTRATION

administrator@excelanto

Employee Registration View Employee's Reports Mail Logout

Employee Registration

Employee Name	<input type="text"/>
Years Of Experience	<input type="text" value="1"/>
Joining Date	<input type="text"/>
Employee Position	<input type="text"/>
Employee Phone Number	<input type="text"/>
Employee Mail Id	<input type="text"/>
Employee Located Area	<input type="text"/>
Employee Address	<input type="text"/>
Employee Username	<input type="text"/>
Employee Password	<input type="password"/>
Image	<input type="button" value="Browse..."/> No file selected.
Note: (*) fields are required to insert.	<input type="button" value="submit"/>



VIEW EMPLOYEE DETAILS

administrator@excelanto

Employee Registration View Employee's Reports Mail Logout

View All Employee

Filter Name Show All

S.No	Joining Date	Employee Name	Mobile	Mail id	View
1	05-05-2013	roshan	8888888888	shankar@excelanto.com	View
2	26-04-2013	marketing	9994261305	marketing@excelanto.com	View
3	01-03-2013	RAMESH	9790463629	ramesh@excelanto.com	View
4	22-04-2013	HEMAVATHI	9767070299	hemavathi@excelanto.com	View
5	18-02-2013	murali	8754063255	muralivelan@excelanto.com	View
6	10-02-2013	Vignesh Pandian	9994569996	vignesh@excelanto.com	View
7	16-07-2012	Thirumurugan	9940968147	thirumuragan@excelanto.com	View
8	01-01-2009	shankar	9994261305	shankar@excelanto.com	View
9	02-11-2012	sivanes	7298872172	sivanes@excelanto.com	View

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VIEW CUSTOMER

administrator@excelanto

Employee Registration View Employee's Reports Mail Logout

View All Customer

Filter: Customer Name Show All

S.No	Company Name	Customer Name Employee Name Customer Mobile Customer Mail Id Status	Customer Mobile	Customer Mail id	Status	Employee Name	Follow Up Date / Time	View
1	mnhvjv	hdhghdghgkjkj	9999999999	shankar@excelanto.com	follow	roshan	21-05-2013 9	View
2	rs	beena	9999999999		notinterested	roshan	Null	View
3	nission	Anand ks	9884449491		select	roshan	Null	View
4	roshan	Anand ks	9884449491		select	roshan	Null	View
5	Aban Offshore Ltd	P Venkateswaran, (Deputy MD)		venkatp@aban.com	notinterested	marketing	Null	View
6	Adhiam Thermal Systems And Solutions Pvt Ltd			info@adhiam.com	notinterested	marketing	Null	View
7	Aesthetix Audio Video India Pvt Ltd			info@aesthetixglobal.com / info@amconnect.in	notinterested	marketing	Null	View
8	Sujana Steel ltd		04023351885	info@sujana.com	select	marketing	Null	View
9	Tulsyan NEC LTD	Venkatesh	39120756	tulsyanec@gmail.com	select	marketing	Null	View
10	Sree Rengaraj Steel & Engg	Harish / subratha		rengaraj_steel@yahoo.co.in	notinterested	marketing	Null	View

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VIEW BY EMPLOYEE NAME

administrator@excelanto

Employee Registration View Employee's Reports Mail Logout

View All Customer

Filter Employee Name sivanesh Show All

S.No	Company Name	Customer Name	Cus Mc	er Mail id	Status	Employee Name	Follow Up Date / Time	View
1	mhvthvjv	hdhghgdhgkjkj	99999	excelanto.com	follow	roshan	21-05-2013 9	View
2	rs	beena	99999		notinterested	roshan	Null	View
3	nission	Anand.ks	98844		select	roshan	Null	View
4	roshan	Anand.ks	9884449491		select	roshan	Null	View
5	Aban Offshore Ltd	P Venkateswaran, (Deputy MD)		venkatp@aban.com	notinterested	marketing	Null	View
6	Adhiam Thermal Systems And Solutions Pvt Ltd			info@adhiam.com	notinterested	marketing	Null	View
7	Aesthetic Audio Video India Pvt Ltd			info@aestheticglobal.com / info@aesthetic.in	notinterested	marketing	Null	View
8	Sujana Steel Ltd		04023351885	info@sujana.com	select	marketing	Null	View
9	Tulsyan NEC LTD	Venkatesh	90120756	tulsyanec@gmail.com	select	marketing	Null	View
10	Sree Rengaraj Steel & Iron	Harish / subratha		rengaraj_steel@yahoo.co.in	notinterested	marketing	Null	View

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VIEW ALL CUSTOMERS UNDER EMPLOYEE

administrator@excelanto

Employee Registration View Employee's Reports Mail Logout

View All Customer

Filter: Customer Name All

S.No	Company Name	Customer Name	Customer Mobile	Customer Mail id	Status	Employee Name	Follow Up Date / Time	View
1	Kalaimagal Higher Secondary School	Kalaimagal Higher Secondary School			follow	RAMESH	04-05-2013 1	View
2	Thooya Anthonier School	Thooya Anthonier School			follow	RAMESH	01-05-2013 1	View
3	Avc College Of Engineering	Avc College Of Engineering			follow	RAMESH	06-05-2013 1	View
4	Crescent Matriculation School	Crescent Matriculation School			follow	RAMESH	02-05-2013 1	View
5	Sri Arabindo Matric School	Sri Arabindo Matric School			follow	RAMESH	02-05-2013 1	View
6	Thirumagal Higher Secondary School	Thirumagal Higher Secondary School			follow	RAMESH	08-05-2013 1	View
7	Trichy Engineering College	Trichy Engineering College			follow	RAMESH	02-05-2013 1	View
8	APR Matriculation School	APR Matriculation School			follow	RAMESH	02-05-2013 1	View
9	9840241118	9840241118			follow	RAMESH	02-05-2013 1	View
10	Kalyanasundaram HR Sec School	Kalyanasundaram HR Sec School			follow	RAMESH	06-05-2013 1	View

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REPORTS

administrator@excelanto

Employee Registration View Employee's **Reports** Mail Logout

View All Customer

Filter: Customer Name All

S.No	Company Name	Customer Name	Customer Mobile	Customer Mail id	Status	Employee Name	Follow Up Date / Time	View
1	Kalaimagal Higher Secondary School	Kalaimagal Higher Secondary School			follow	RAMESH	04-05-2013 1	View
2	Thooya Anthonier School	Thooya Anthonier School			follow	RAMESH	01-05-2013 1	View
3	Avc College Of Engineering	Avc College Of Engineering			follow	RAMESH	06-05-2013 1	View
4	Crescent Matriculation School	Crescent Matriculation School			follow	RAMESH	02-05-2013 1	View
5	Sri Arabindo Matric School	Sri Arabindo Matric School			follow	RAMESH	02-05-2013 1	View
6	Thirumagal Higher Secondary School	Thirumagal Higher Secondary School			follow	RAMESH	08-05-2013 1	View
7	Trichy Engineering College	Trichy Engineering College			follow	RAMESH	02-05-2013 1	View
8	APR Matriculation School	APR Matriculation School			follow	RAMESH	02-05-2013 1	View
9	9840241118	9840241118			follow	RAMESH	02-05-2013 1	View
10	Kalyanasundaram HR Sec School	Kalyanasundaram HR Sec School			follow	RAMESH	06-05-2013 1	View

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MAIL FUNCTION TO ADMIN

administrator@excelanto

Employee Registration View Employee's Reports **Mail** Logout

View All Mail

S.No	Date/Time	Mail Id	Subject	Message
1	06-03-2013 / 6:15 PM	ramesh@excelanto.com	out time information	monicka is asking permission to leave office today.....time is 6:00pm
2	25-01-2013 / 12:20 PM	thinumurugan@excelanto.com	sdfsds	sdfs
3	24-01-2013 / 5:06 PM	thinumurugan@excelanto.com	fty	deyer
4	24-01-2013 / 12:52 PM	shankar@excelanto.com	hai	haiaaaaa

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THANK YOU

