



Navsya Technologies Pvt. Ltd.

BlueChilli CRM Solution

Agenda

- What is CRM?
- CRM - SFA Overview
- System Features
- Sample Screenshots



What Is CRM?

How does it differ from simple “contact management”?

Customer Facing

- Sales, service, and marketing activities

Process-focused

- Workflow drives consistent execution

Team-oriented

- Collaborate with others inside and outside of the organization

Successful CRM is NOT just dependent on selecting the “best software”, it’s about getting the right strategy



Overview

- Blue Chilli CRM is an easy-to-use web-based CRM solution for contact, calendar and sales management. We believe that managing our customers should be high on our priority list. And all small and medium companies or organizations must have access the best tools and applications without incurring cost on hardware and software.
- CRM provides a deeper customer / market understanding and makes the sales process smooth and efficient
- Automate business processes in Sales and Marketing departments
- Lead & Opportunity Management
- Sales Team Interactions Tracking
- Customer Profiling & Segmentation



Customized CRM Solution

- Specifically tuned for your specific business requirements
 - It works the way your business does
- Easily adapt to your business processes
- Integrate with other systems
- Additional Business Intelligence
- Fast and Flexible Solutions

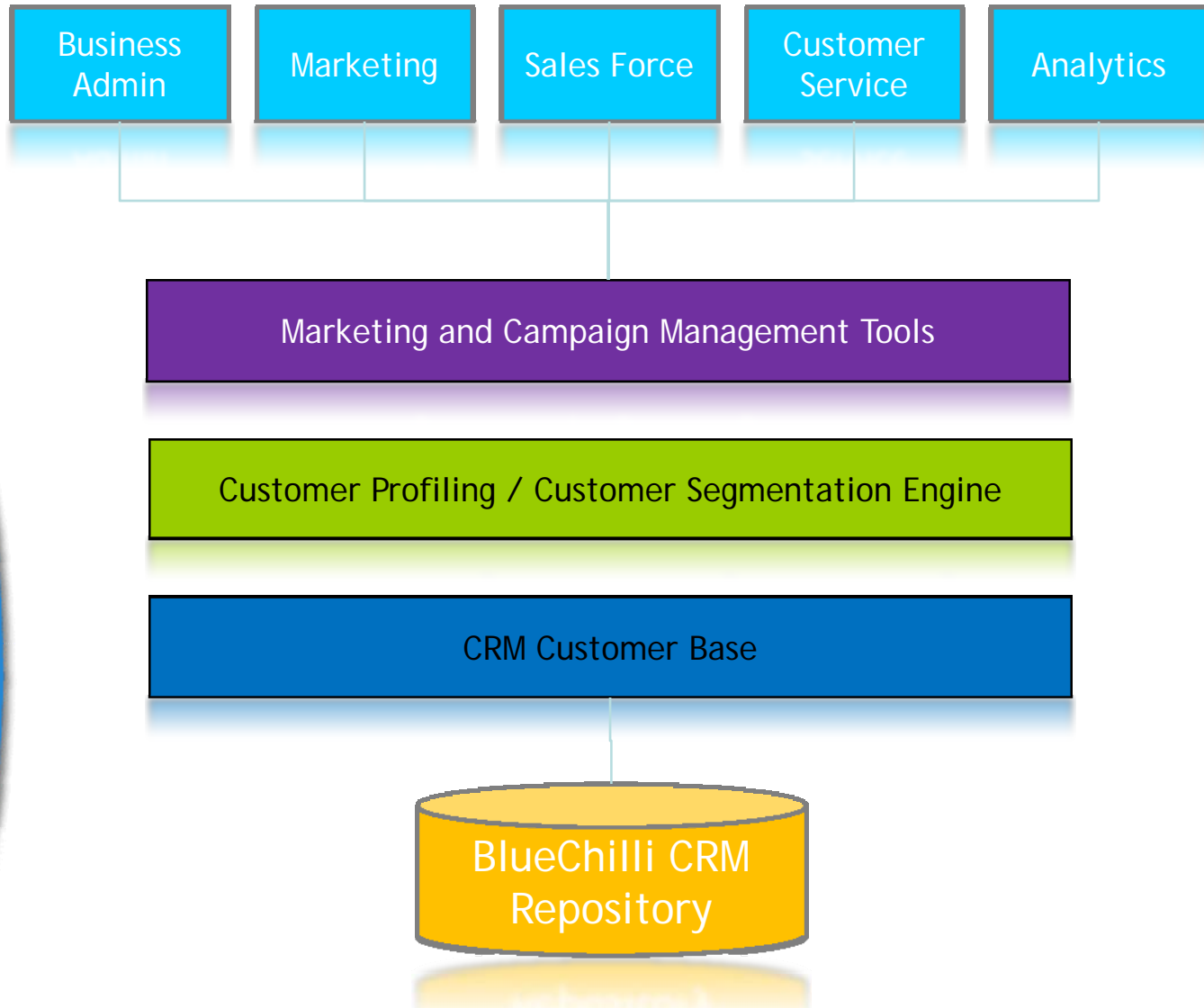


System Modules

- Business Administrator
- Marketing
- Customer Service
- Sales Force Automation
- Analytics



System Modules



Business Administrator

Manage Users

- Define users for the system

Manage Roles and Permissions

- Defines functions and access rights

Define and manage Teams

- Team represents a department that performs independent function in an organization
- Consists of group of users with reporting hierarchy

Define Master Data



Marketing

Campaign Management Lifecycle:

- Campaign Definition
- Campaign Planning & Scheduling
- Customer Segmentation
- Manage Response and Measure Effectiveness



Marketing Module

Define Customer Segment

- Customized filter for your database

Define communication to be sent

- Create personalized HTML or plain text mailers

Define customized Campaigns

- Create segment specific offers

Response management and follow-up

Analytics

- Campaign Effectiveness Report



Customer Service Module

- **Inbound:**

- Customer Interacts through phone
- Sales Executive validates customer identification on system
- Sales Executive gets a 360 degree view of customer information
- Sales Executive answers the customer's query
- Sales Executive records customer interactions in the system

- **Outbound:**

- Sales Executive gets 360 degree view of customer information
- Sales Executive calls customer
- Sales Executive explains the campaign
- Sales Executive records the transaction in the system



Customer Service - Possibilities

- Implement Computer Telephony Integration (CTI) for call recording and voice/data logging
- Implement third-party chat software that supports proactive chat sessions
- Implement Interactive Voice Response (IVR) systems for information access / order booking

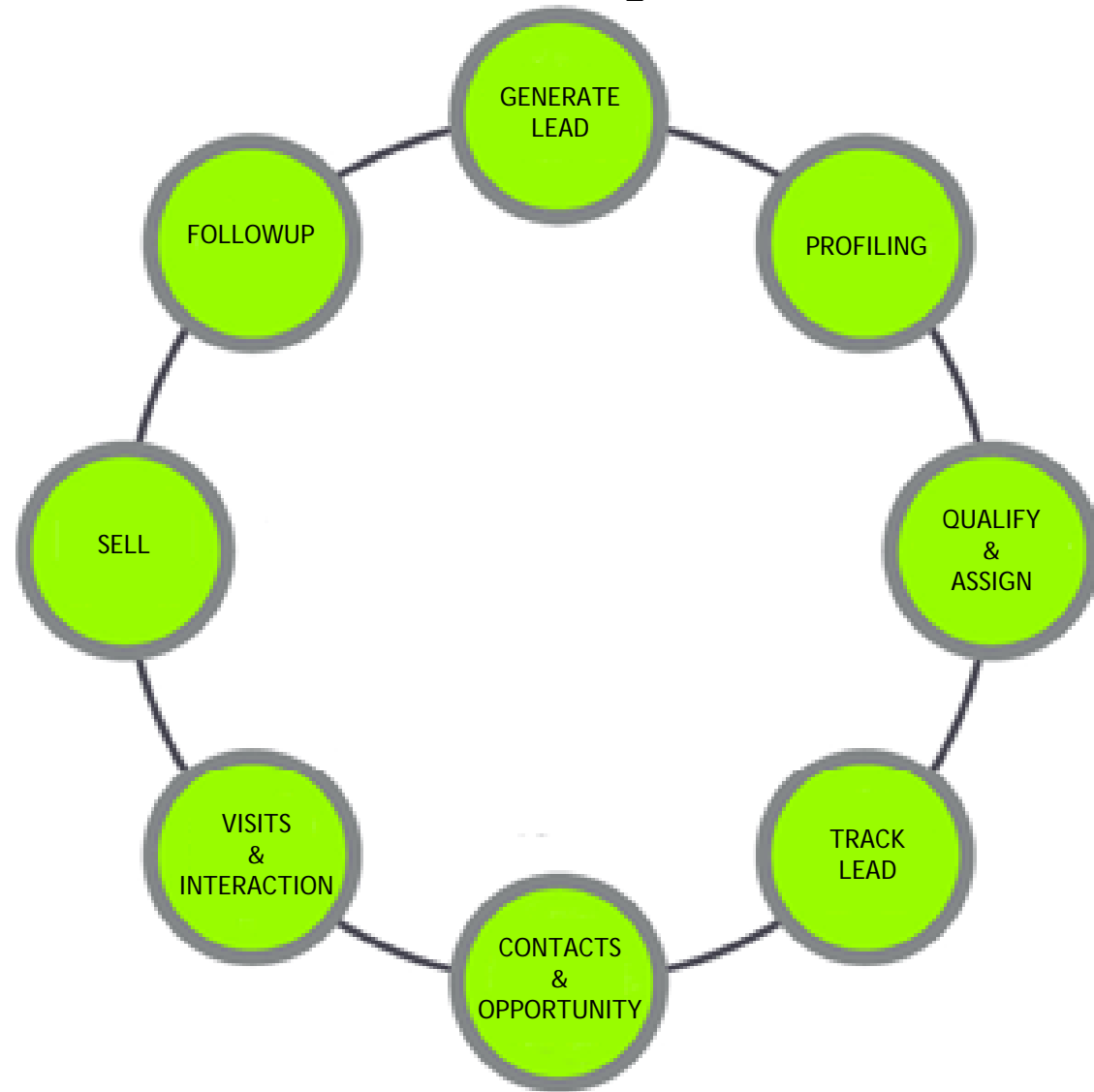


Sales Force Automation

- Territory Management
- Opportunity Management / Sales Lifecycle
 - Lifecycle:
 - Define Campaigns
 - Generate prospects
 - Contact prospects
 - Opportunity closure
 - Measure campaign effectiveness
 - Measure Sales Team performance



Sales Lifecycle



Territory Management

- Define Country
- Define Zone
- Define State
- Define Territories
- Arrange Sales Teams according to Country, Zone, State and Territory



Opportunity Management Module

- Define Customer Segment
 - Customized filter for your database
- Define customized Campaigns
 - Create segment specific offers
- Generate prospects and assign them to Sales Team
 - Assign and Re-assign opportunities to Sales personnel
- Sales Team contacts prospects and persuades them to buy
- Creates and submits proposals and quotation resulting in order creations.



Opportunity Management Module

- Record interactions and follow-ups
- Record new leads
- Opportunity closure
- Analytics
 - Campaign Effectiveness Report
 - Sales Team Performance Report



Document Management System

- Allows to share documents online
- Assign access rights to documents
- Role & user based access
- Read / Change / Delete rights
- Version control
- Search for documents
- Build a knowledge bank



Reports

- Leads Vs. Calls - Daily
- Leads Vs. Calls -Weekly
- My Pipeline Report
- My Leads
- My Accounts
- My Top Open Potentials
- My Meetings
- My Calls
- Graphical Dashboards - Animated 3D Charts
- Excel / PDF Downloads



Data Access & Security

- Access to the system is password protected
- Role based access to authorized personnel
- Activity logging and audit trail
- Encrypted passwords
- Cookies / Temporary Files are not used to store crucial data



Summary

The CRM System facilitates to

- Achieve better customer profiling
- Track sales teams
- Generate sales reports
- Accurate Sales Force deployment and monitoring
- Information about all involved entities
- Target offers and promotions to entities basis profile information



navsya



Sample Screen Shots



Dashboard - Customizable

Welcome admin
Home | Change Password | Logout

Leads | Opportunity | Inquiry | Orders | Customers | Contacts | Supplier | Associate | DMS | Vouchers | Campaign | Query | Reports

MY REMINDERS: [dfg...](#) [xcvxcv...](#)

Dashboard



Google

Google talk

+ Google Gadgets powered by Google

Quick Links

- Create New Lead
- Search Lead
- Create New Opportunity
- Search Opportunity
- Create New Inquiry
- Search Inquiry
- Add Supplier Quote

March 2010						
Mon	Tue	Wed	Thu	Fri	Sat	Sun
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Reminders:

- fgh
- xcv
- dfg
- bn
- CM
- ZXCXZC
- fgh
- sdf
- zxczxcz
- dfg
- xcvxcv
- CMx

Tasks:

- There are no pending tasks.

Notes:

No notes set

Tasks and Reminders

Leads | Opportunity | Inquiry | Orders | Customers | Contacts | Supplier | Associate | DMS | Vouchers | Campaign | Query | Reports

MY REMINDERS:

[dfg...](#) [xcvxcv...](#)

Dashboard



Google

Google talk

+ Google Gadgets powered by Google

Quick Links

- Create New Lead
- Search Lead
- Create New Opportunity
- Search Opportunity
- Create New Inquiry
- Search Inquiry
- Add Supplier Quote

May 2010				
Mon	Tue	Wed	Thu	Fri
3 	4 	5 	6 	7
10	11	12	13	14
17	18	19	20	21
24	25	26	27	28
31				

Calendar Schedule

Today's Schedule
Add a Reminder

Priority:

Subject:

Start date:

Start time: : A.M.

End date:

End time: : A.M.

Meeting-type:

Meeting-with:

Status:

Remarks:

Reminder me : before start time



View Contacts

Leads | Opportunity | Inquiry | Orders | Customers | **Contacts** | Supplier | Associate | DMS | Vouchers | Campaign | Query | Reports

MY REMINDERS: [dfg...](#) [xcvxcv...](#)

My Contacts



Sort By: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

GLOBAL ADDRESS BOOK RESULT Aa

Company Name	Contact Person	Address	Email	Telephone	Mobile	Action
Test	Test	Prabhadevi	Test@Test.com	3354657	343467	
fgfdg	hgh	mulund		123456789	2343	
Infosys	John Dsouza	Bhiwandi	john@gmail.com	35365	4657354	
mkkm	kmkm	bvdbv		11	113	
Navsya	siddharth	mulund	debu2in2@gmail.com	25208095	9224243310	
navsya	nagesh	mulund	n@n.com	25208095	9224243310	
Navsya	Sudoku	Mulund	sud@gmail.com	3253465	34543657	
Navsya	Rakhi	Mulund	raks@gmail.com	2345325	436547	
Navsya	Rakhi	Mulund	raks@gmail.com	2345325	436547	
Navsya	Rakhi	Mulund	raks@gmail.com	2345325	436547	

Leads

Leads | Opportunity | Inquiry | Orders | Customers | Contacts | Supplier | Associate | DMS | Vouchers | Campaign | Query | Reports

MY REMINDERS:

 My Leads



ADD NEW LEAD

Lead Info.

Contacts

Proposals

Quotations

Notes

Name

Company

Industry

Source

Reffered By

Agent

Campaign

Status

Convenient Time To Contact

Department

Designation

Email

Mobile 1

Phone(R)

Office Phone 1

Extn.

Fax

Website

Submit

Reset

LeadsContd.

[Leads](#) | [Opportunity](#) | [Inquiry](#) | [Orders](#) | [Customers](#) | [Contacts](#) | [Supplier](#) | [Associate](#) | [DMS](#) | [Vouchers](#) | [Campaign](#) | [Query](#) | [Reports](#)

MY REMINDERS:

 My Leads

ADD NEW LEAD

Lead Info.

Contacts

Proposals

Quotations

Notes

Address

Country

State

City

Pincode

Office Phone 2

Mobile 2

Billing Address

Country

State

City

Pincode

Office Address

Country

State

City

Pincode



Submit

Reset

Search Lead Information

SEARCH LEADS

From

To

Company Name

Product Category

Product

Status

SEARCH RESULTS Aa

Company	Con. Person	Status	Action
navsya	Mr.sid_15_2010_2	Won	
navsya	Mr.sid_15_2010	Won	
Navsya	Mr.sidTest	Won	
asxzs	Mr.test_25	Won	
Navsya	Mr.zinkox	Negotiation	
comapny1	Mr.test	Won	
Mikanovicgh	Mr.Vladmir Gustov	Cold Inquiry	
Mikanovicgh	Mr.Vladmir Gustov	Cold Inquiry	
asxzs	Ms.test17	Negotiation	
navsya	Mr.aj_test	Negotiation	

10 | Page 1 of 38 | Total records found 379



Add Suppliers

Leads | Opportunity | Inquiry | Orders | Customers | Contacts | Supplier | Associate | DMS | Vouchers | Campaign | Query | Reports

MY REMINDERS:



ADD SUPPLIER

Details | Contracts | Contacts | Interactions | Quotations

Supplier Category*	--Select Category--
Supplier Status*	--Select Category--
Supplier Name*	Mr. <input type="text"/>
Contact Person*	<input type="text"/>
Address	<input type="text"/>
Country	India
State	Maharashtra
City	Mumbai
Pincode	<input type="text"/>
Product / Services*	<input type="text"/>
Remark	<input type="text"/>

Submit

Reset

Add Contracts for Suppliers

Welcome admin
[Home](#) | [Change Password](#) | [Logout](#)

[Leads](#) | [Opportunity](#) | [Inquiry](#) | [Orders](#) | [Customers](#) | [Contacts](#) | [Supplier](#) | [Associate](#) | [DMS](#) | [Vouchers](#) | [Campaign](#) | [Query](#) | [Reports](#)

MY REMINDERS:


 Suppliers




ADD SUPPLIER




[Details](#) | [Contracts](#) | [Contacts](#) | [Interactions](#) | [Quotations](#)

Contract Name

From 

To 

Services offered

File Upload   

Sr.No	Contract Name	Services offered	Remove
-------	---------------	------------------	--------

Agent Registration Details



ADD ASSOCIATE

Associate Details Commission Details Notes

Associate Name	Mr. <input type="text"/>
Associate Id	admin
Password	*****
Confirm Password	<input type="text"/>
Contact Person	<input type="text"/>
Address	<input type="text"/>
Telephone No.	<input type="text"/>
Mobile No.	<input type="text"/>
Country	India <input type="text"/>
State	Maharashtra <input type="text"/>
City	Mumbai <input type="text"/>
Pincode	<input type="text"/>

Submit

Reset




Agent Commission

 Associates

ADD ASSOCIATE

Associate Details | **Commission Details** | Notes

Product Category	-- Select Category --		▼
Product / Service	--Select Products--		▼
Commission Basis	<input type="radio"/> Revenue Generated <input type="radio"/> Number of Transactions		
Slab From	<input type="text"/>		
Slab To	<input type="text"/>		
Commission	<input type="text"/>	Percent	▼

Product	Commission Basis	Slab From	Slab To	Commission	Commission Type	Delete
						



Expense Voucher with Approval Cycle

Vouchers

SEARCH RESULTS Aa ⚙					
VoucherId ▲▼	Status	CreatedDate ▲▼	Total ▲▼	Action	
41	Pending	23/11/2009	0		
45	Pending	23/11/2009	999		
46	Pending	23/11/2009	0		
48	Pending	23/11/2009	11		

10 | Page 1 of 1 | Total records found 4

Vouchers

Raise Voucher

Voucher No: Date:

Particulars:

Type: Amount:

Voucher Details

No.	Particulars	Type	Amount	Status
-----	-------------	------	--------	--------




Campaign Management





ADD CAMPAIGN


Campaign name*

Remarks

Execution date* 

Start date* 

End date* 

Campaign Type* 

File



Reports



Select Report Type

Caller Report By	<input type="text" value="----- select-----"/>	<input type="button" value="v"/>
Lead Report By	<input type="text" value="----- select -----"/>	<input type="button" value="v"/>
Opportunity Report By	<input type="text" value="----- select-----"/>	<input type="button" value="v"/>
Inquiry Report By	<input type="text" value="----- select -----"/>	<input type="button" value="v"/>
Customer Report By	<input type="text" value="----- select -----"/>	<input type="button" value="v"/>
Order Report By	<input type="text" value="----- select -----"/>	<input type="button" value="v"/>
Billing Report By	<input type="text" value="----- select -----"/>	<input type="button" value="v"/>
Lead Query By	<input type="text" value="-----select-----"/>	<input type="button" value="v"/>

Submit

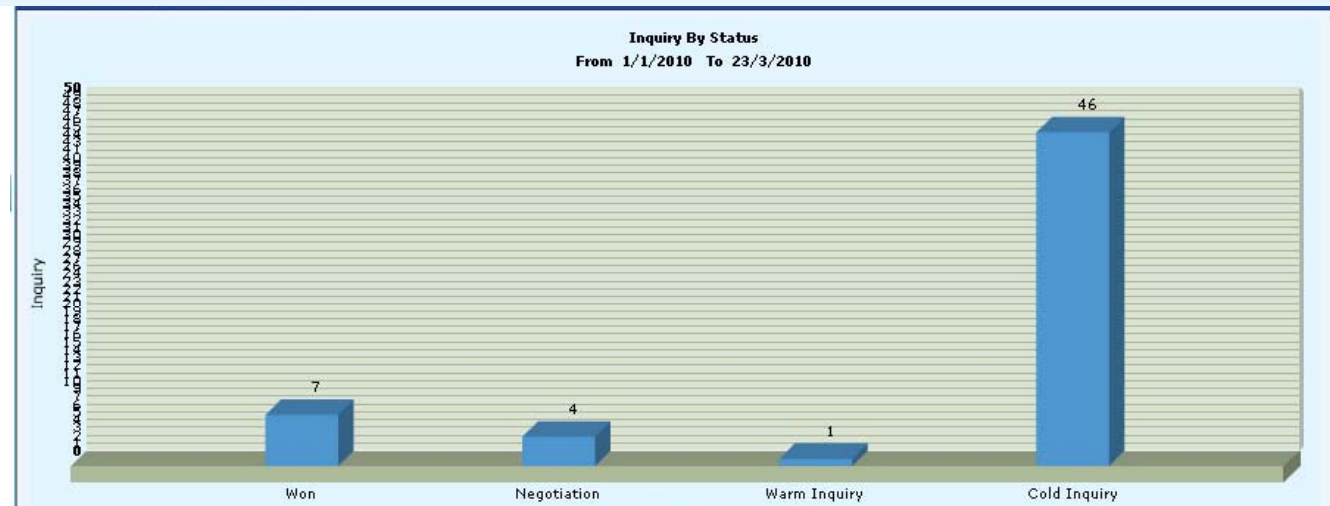
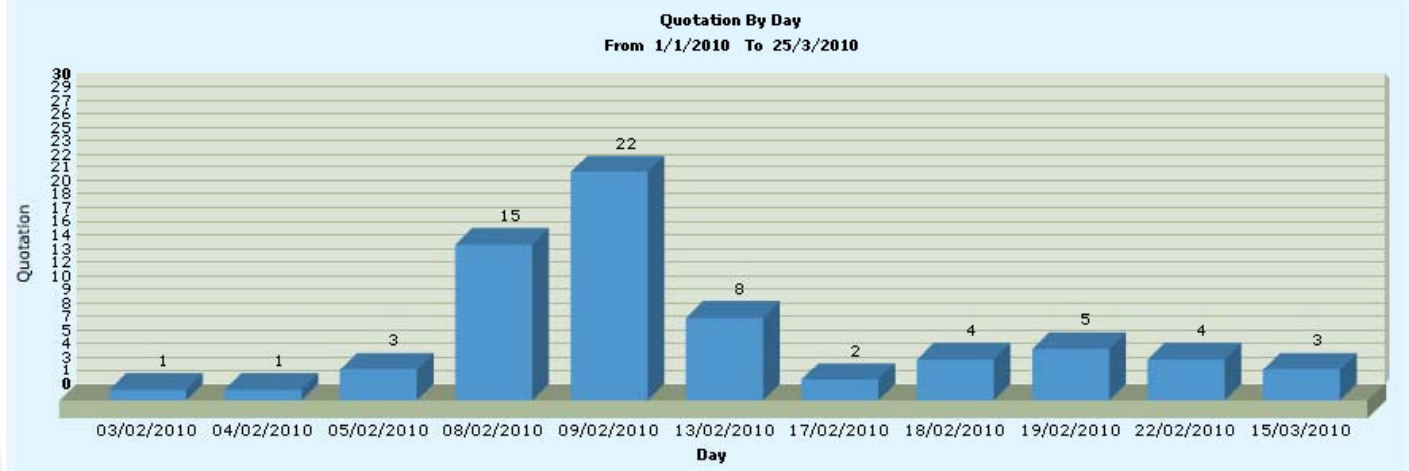
Reset



Report Samples

Quotation By Day

Graph Report

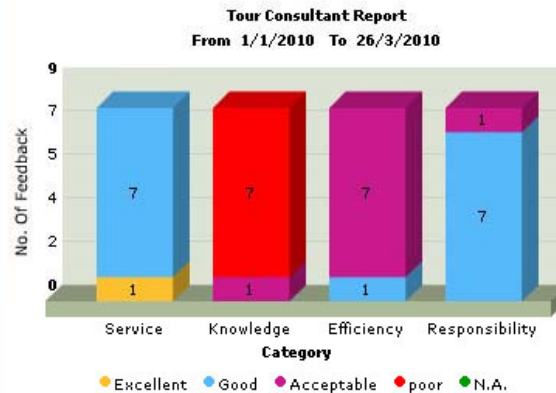


Report Samples

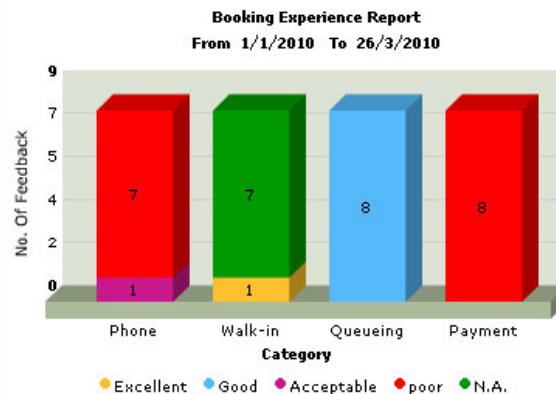


Customer Feedback Report

Booking Experience



	Service	Knowledge	Efficiency	Responsibility
Excellent	1	0	0	0
Good	7	0	1	7
Acceptable	0	1	7	1
poor	0	7	0	0
N.A.	0	0	0	0



	Service	Knowledge	Efficiency	Responsibility
Excellent	0	1	0	0
Good	0	0	8	0
Acceptable	1	0	0	0
poor	7	0	0	8
N.A.	0	7	0	0



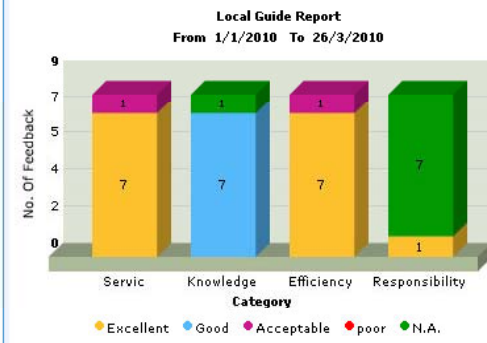
Report Samples



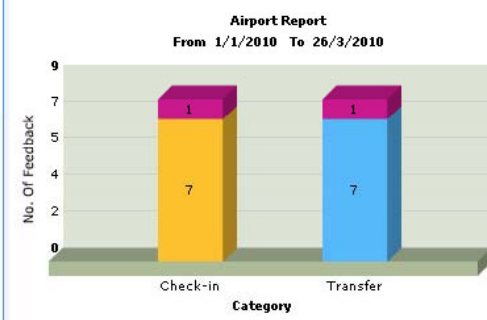
Travel Experience



	Service	Knowledge	Efficiency	Responsibility
Excellent	7	0	1	0
Good	0	0	0	0
Acceptable	0	0	7	0
poor	0	0	0	0
N.A.	1	8	0	8



	Service	Knowledge	Efficiency	Responsibility
Excellent	7	0	7	1
Good	0	7	0	0
Acceptable	1	0	1	0
poor	0	0	0	0
N.A.	0	1	0	7



	Check-in	Transfer
Excellent	7	0
Good	0	7
Acceptable	1	1
poor	0	0

Reports

- Import client data from any system that can export to a .csv format.
- Export data to Excel, PDF
- Print mailing labels from your contacts.
- Integrated analytics



Benefits

- Central Repository of Information
- Share and transfer leads
- Lead Tracking from anywhere
- Complete sales cycle can be tracked
- Anywhere and anytime access to information
- Robust, secure and authenticated information access
- Online Document Management for sharing communication like brochures & flyers
- Online expense tracking and approvals
- Set sales targets and track them
- Easy Interaction and visit tracking



Technical Details

- Completely built using Open Source Platform using Java Technology
- No Licensing Required
- Web based solution, easy access from anywhere
- Can run on any Hardware, Operating System, Application Server
- Can run on any database
 - ❖ Oracle
 - ❖ mySQL
 - ❖ MS-SQL Server
- Easy integration with ERP Applications





Thank You!