CRM Specifications

- Informative Dashboard
- **Enquiry Management**
  - Add/View/Edit & Delete Enquiry
  - Search Enquiry (Cross Field)
  - Enquiry Allotment to BD Team
  - Follow-up Marking
  - Admin Suggestions
  - Enquiry Forwarding
  - Maturity Marking
  - Site Visit
  - Master Entries (Tags, Project Type, Enq. Source)
- **Employee Management**
  - Add/View/Edit & Delete Employee
  - Employee Login Enable/Disable
  - Commission Marking
  - Master Entries (Designation, Branch & Org. etc.)
  - Commission Master
- **PR Tools**
  To make effective communication system between client & company, a channel has been provided to send sms and emails to the enquiry & Client database.
- **Graphical Analysis**
  Graphical representation of figures & facts to make it use as a managerial decision tool
- **Utilities**
  - Automated Birthday & Anniversary Wishes To The Clients
  - EMI Calculator
  - Plot Availability Search
- Admin Messages
  admin message is a tool given to allot work to the employees, send notifications/offers/wishes to the client and channel partners on their respective panel and on email.
- Database Backup
- Admin Profile
- **Property Booking Management**
  - Add/View/Edit & Delete Client
  - Add Booking
  - Manage Project & Properties
  - Master Entries
    - Payment Plans
    - Interest Rates
    - Other Charges Provision
  - Provision of PLC
  - Provision of Discounts
  - Booking Cancellation
  - Refunds
  - Transfer of Bookings
  - Receipts Generation (Multiple Formats)
  - Allotment Letter
  - No-Dues Certificates
  - EMI Calculations
  - Payment Reminder (SMS & Emails)
  - Client Documents Storage
  - Registry Marking
- **Employee Login**
  To mark, follow-up of clients and to manage daily task list
- **Client Login**
  To know the details of his bookings, payments, Due & Paid EMI’s and receipt generation and admin notifications.
- **Channel Partner Login**
  To know the details of his bookings, client payments, Dues & Paid EMI’s, commission reports and admin notifications.
- **Role Management**
  To distribute rights to the different people to manage a particular section of software.
- **Reports**
  - Booking – Loaned, Buy Back, Holding
  - Enquiry
  - Site Visit
  - Registry – Pending and Completed
  - EMI – Due, Cleared, Bounced, In process
  - Client Wise
  - Employee/Channel Partner
  - Summary