

ENTERPRISE CRM SOLUTION

PRESENTED BY:



WHAT DO WE OFFER?

Since 2012, Biztechnosys has helped Companies Gain Business Intelligence to Enhance Productivity and Profits.

Simple yet Powerful, Biztechnosys CRM is built to Increase Sales and Improve Service with Integration of Pre-Sales, Sales and Service functions.

Biztechnosys CRM has Operational, Analytical and Collaborative capabilities using which Companies can work with internal and external entities with real time actionable data.





FEATURES OF CRM

Every business industry emphasizes on a long term relationship with their customers to nurture its stability in today's competitive market. Nowadays, Customer's expectations are not only limited to get best products and services, they also need a business in which they want to receive exactly what they demand and in a quick time.

CRM involves various components and sub features to perform effectively. It performs various functions such as marketing, manufacturing customer service, field sales etc. All these functions of CRM system directly or indirectly involve the participation of customers with the organization in order to ensure quality service delivery.

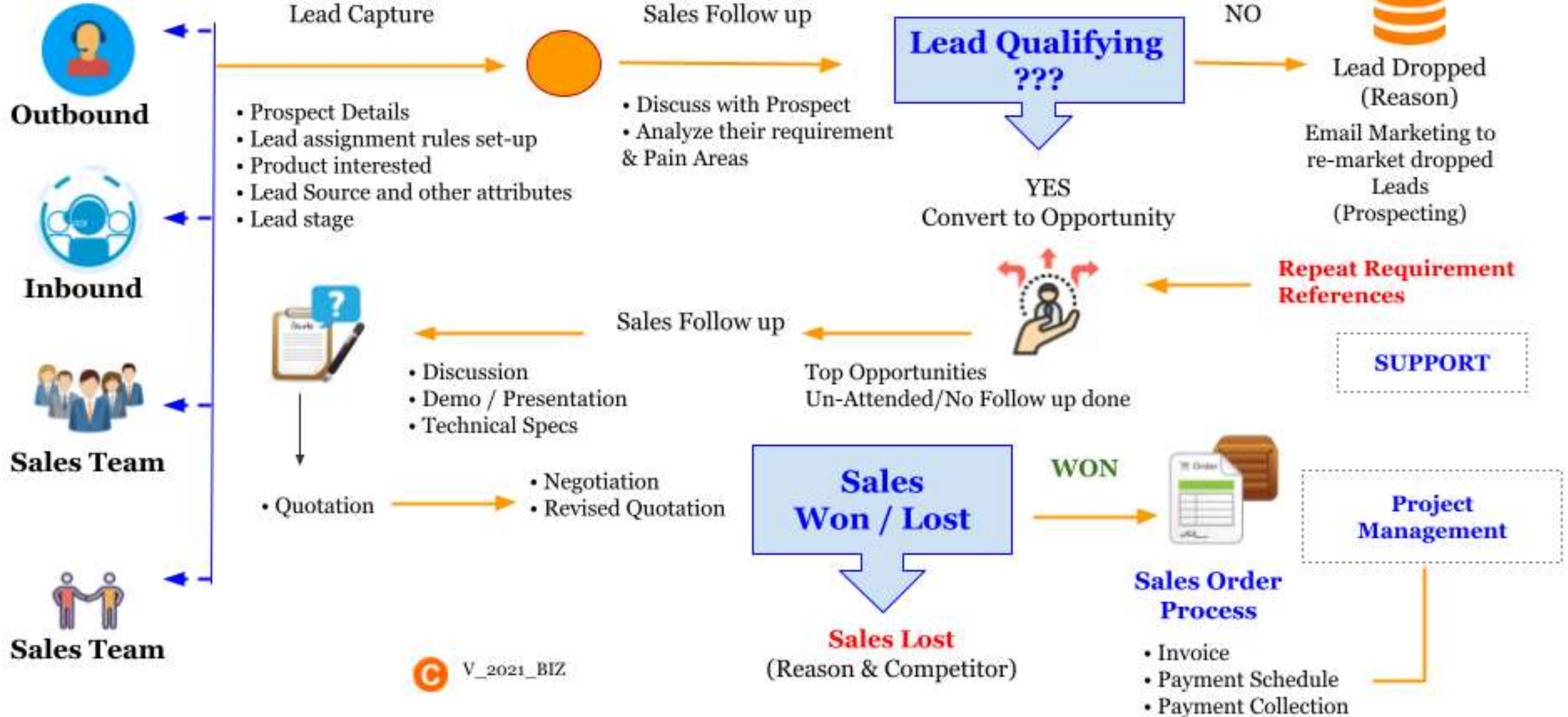
Elements of CRM:

- People Management
- Lead Management
- Sales force automation
- Customer Service
- Workflow automation
- Business Reporting
- Analytics



Sales Process

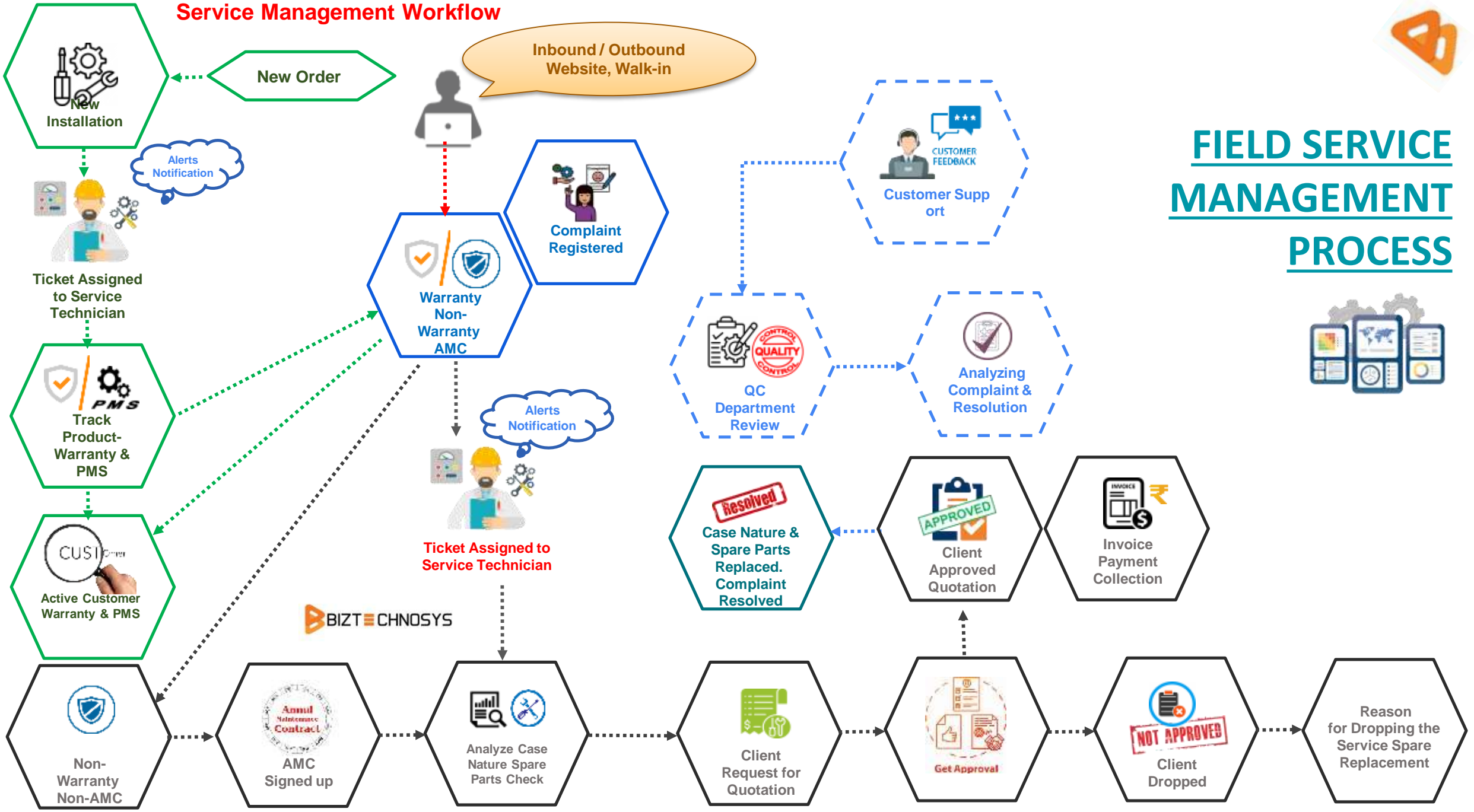
Marketing Campaign (Planning & Execution)





Service Management Workflow

FIELD SERVICE MANAGEMENT PROCESS



New Order

Inbound / Outbound Website, Walk-in

New Installation

Alerts Notification

Ticket Assigned to Service Technician

Track Product-Warranty & PMS

Active Customer Warranty & PMS

Non-Warranty Non-AMC

AMC Signed up

Analyze Case Nature Spare Parts Check

Client Request for Quotation

Get Approval

Client Dropped

Reason for Dropping the Service Spare Replacement

Complaint Registered

Warranty Non-Warranty AMC

Alerts Notification

Ticket Assigned to Service Technician

BIZTECHNOSYS

Case Nature & Spare Parts Replaced. Complaint Resolved

Client Approved Quotation

Invoice Payment Collection

QC Department Review

Analyzing Complaint & Resolution

Client Approved Quotation

Resolved

APPROVED

NOT APPROVED

Get Approval

QC Department Review

Analyzing Complaint & Resolution

CUSTOMER FEEDBACK

Customer Support

Highlights of CRM



Campaign



Leads



Pre Sales



Opportunity



Customers



Quotes



Invoices



Payments



Purchase Order



Sales Order



Vendors



Organisation



Products



Stocks



Documents



FAQ



Tickets



Attendance



Email Temp



Email & SMS
Marketing



Calendar



Cust. Portal



Track Location



Check-In
Check-Out



DATA-DRIVEN DASHBOARDS

- History
- Upcoming Activities
- Funnel
- Opportunities by Stage
- Sales Pipeline
- Total Revenue
- Top Opportunities
- Leads by Status
- Leads by Source
- Leads by Industry
- Overdue Activities
- Key Metrics
- Tag Cloud
- Total Amount by Sales stage

Customize the Dashboard through the - Mini List

Interactive Dashboard

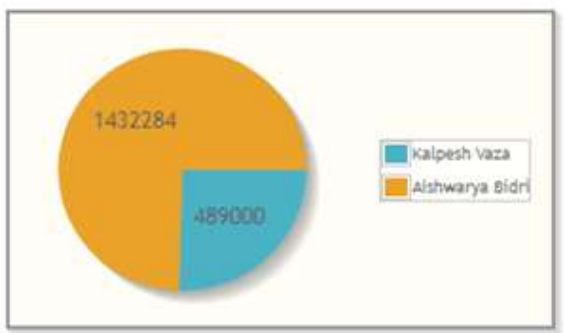
provides the Summarized reports on the entire Process



DATA-DRIVEN DASHBOARDS



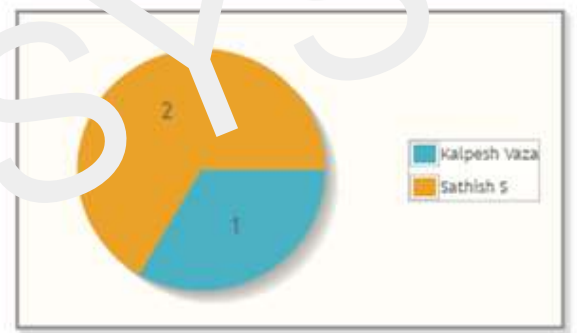
Revenue by Salesperson



Leads by Status



Open Tickets



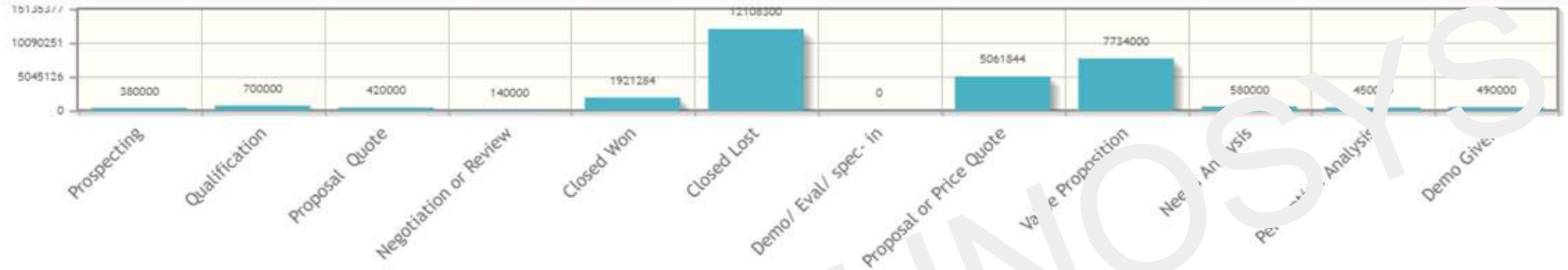
Total Amount by Sales stage



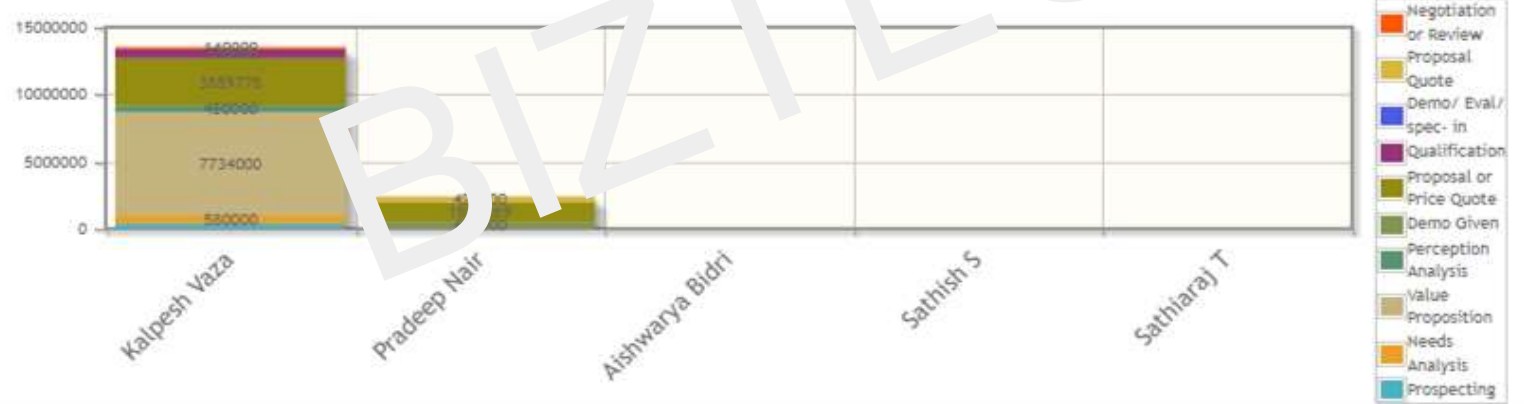
DATA-DRIVEN DASHBOARDS



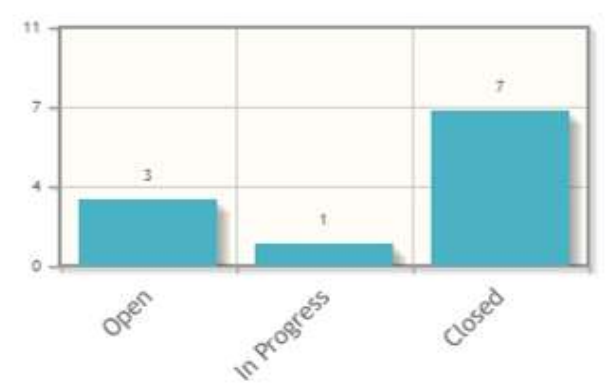
HOME



Sales Pipeline



Tickets by Status

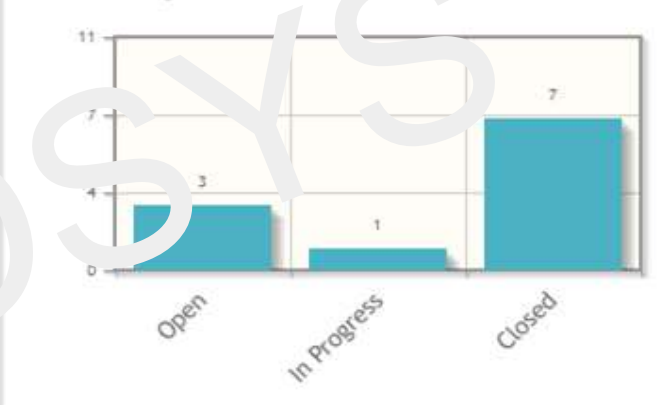
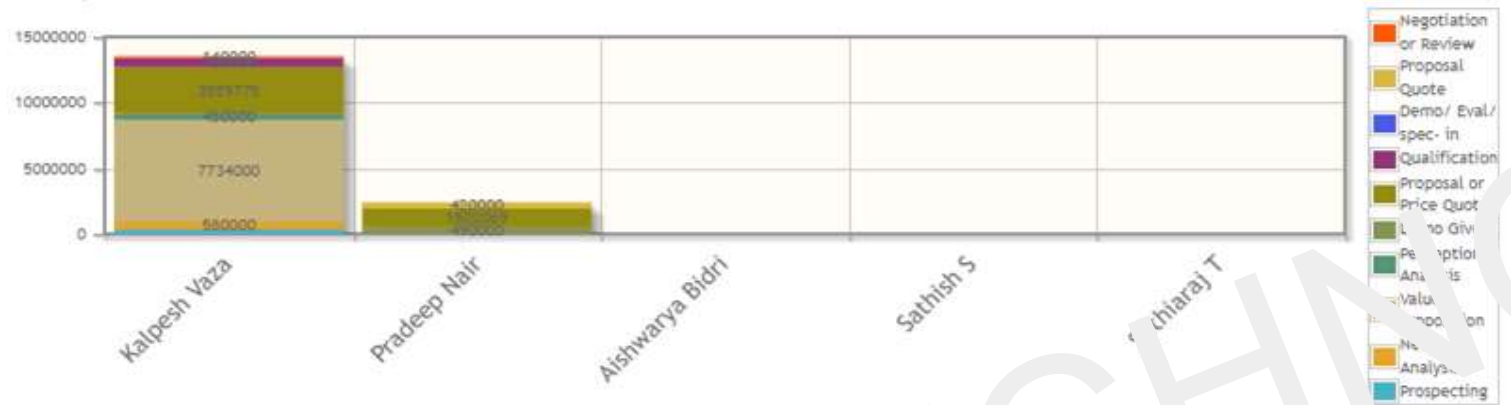




DATA-DRIVEN DASHBOARDS



HOME



Sales Funnel



Key Metrics

Prospect Accounts	0
Open Tickets	4
Hot Leads	0
Potentials Won	5
Open Quotes	202



SALES MANAGEMENT

- Convert leads into Deals/ Customers
- Capture Sales Leads and increasing the Pipeline cases
- Create different tasks/events on leads, deals, contacts or customers/companies
- Create and track unique sales activities.
- Efficiently delegate tasks to your team
- Keep a tab on interactions, meetings, and more.
- Create Quotations and send to customers through emails right within the CRM
- Create Notifications & Reminders for all Tasks/Events
- One dashboard for seeing all task and updates at one place.
- Create Sales Orders & Invoices with One tool.



NEW LEAD CAPTURE



First Name *

Primary Phone

Mobile

Lead Source

Industry

Lead Status

Assigned To *

Segment

Looking for

Area

Product Category

Last Name

Company

Title

Primary Email

Secondary Email

Follow Up Date

Lead Stage

Turnover in USD or INR

Lead Type

Number Of Employees

FILTER LEAD REPORTS



BIZTECHNOSYS 4

LEADS + Add Lead Import Customise

LISTS + Create Filter

- Hot Leads
- This Month Leads
- email scanner leads
- stared leads
- Sundram Leads
- Jagadeesh leads
- created in this month
- Old_2019 Leads
- Pradeep Leads
- assigned to is null
- Hot Leads
- Lead Status Wise Report-Ais...

Show less

TAGS

- price

1 to 20 of ?

<input type="checkbox"/>	<input type="checkbox"/>	First Name	Last Name	Primary Phone	Company	Lead Source	Primary Email	Website
<input type="checkbox"/>	<input type="checkbox"/>	Affan	Affan	XXXXXXXXXX76	XXXXXX	Sulekha	apaffan@xxx.io	www.XXXXX
<input type="checkbox"/>	<input type="checkbox"/>	David	David	XXXXXXXXXX	XXXXXX	Shriram	david@XXXXXXXXXXco.com	www.XXXXXXXXXXXco.
<input type="checkbox"/>	<input type="checkbox"/>	Vanessa	Vanessa	XXXXXXXXXX	XXXXXX	Shriram	vperez@XXXXXXXXXXangeXXXXXXXXXXn.org	XXXXXXXXXXgefo
<input type="checkbox"/>	<input type="checkbox"/>	George	George	25XXXXXXXXXX	XXXXXX	Shriram's Leads	XXXXXXXXXX@gmail.com	
<input type="checkbox"/>	<input type="checkbox"/>	Ashwin Jain	Ashwin Jain	91XXXXXXXXXX	XXXXXX	Reference	ashwinXXXXXXXXXX@gmail.com	www.XXXXXXXXXXXpli.
<input type="checkbox"/>	<input type="checkbox"/>	Manjunath	Manjunath	8XXXXXXXXXX	XXXXXX	Sulekha		
<input type="checkbox"/>	<input type="checkbox"/>	????	XXXXXX		XXXXXX	Shriram's Leads	XXXXXXXXXXy@XXXXXXXXXX.com	
<input type="checkbox"/>	<input type="checkbox"/>	Kurland	Kurland	(51)XXXXXXXXXX	XXXXXX		pkurland@XXXXXXXXXXs.com	

TARGET MANAGEMENT



BIZTECHNOSYS 4

TARGETS > All + Add Record Import Customise

LISTS + Create Filter

SEARCH FOR LIST

SHARED LIST All

TAGS

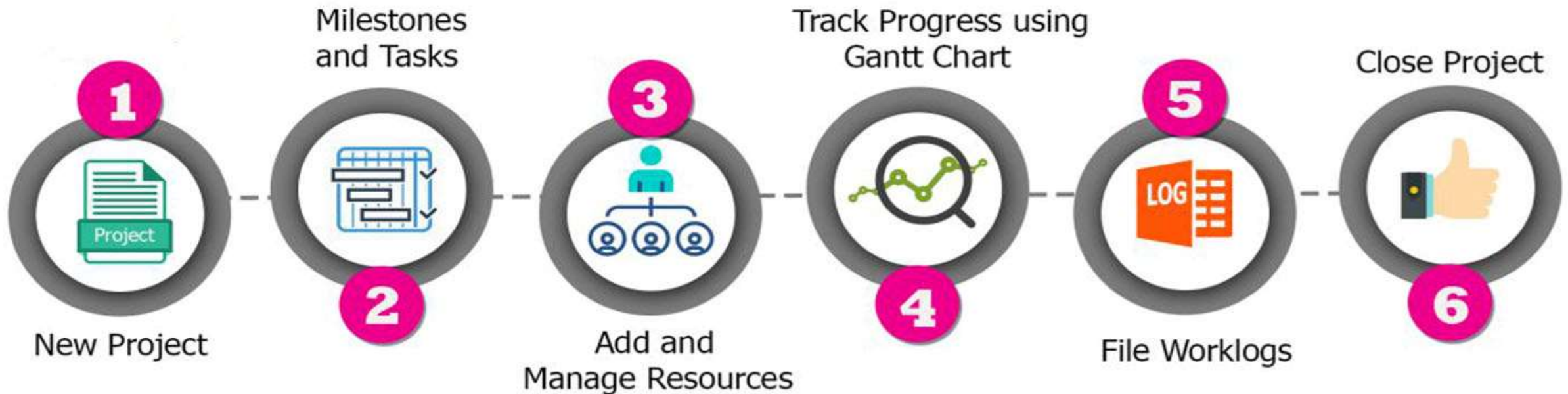
1 to 3 of ?

<input type="checkbox"/>	<input type="checkbox"/>	target Name	Assigned To	Target amount	Achieved	Pending Value	Achieved in Percentage	Total Deal Amount
<input type="checkbox"/>		target for july month	Lokesh	₹50,000.00	₹0.00	₹0.00	0	₹0.00
<input type="checkbox"/>		sales target for lokesh	Lokesh	₹50,000.00	₹5,000.00	₹44,000.00	0	₹6,500.00
<input type="checkbox"/>		Sales Target - July	Amit Karyal	₹194,390.00	₹0.00	₹0.00	0	₹0.00



PROJECT MANAGEMENT

- Create different Projects based on the customer Sales order.
- Create different Project task or milestones for each project.
- Planning, tracking and collaboration with ease is possible in the team.
- Assigned team can update the status of the projects.
- It will record all the information like project name, start date, end date, assigned to which team member, invoice and payments details, etc.



TASK MANAGEMENT



Mr. AXXXXAfXXX
7XXXX7XXX5
tpaffan@XXXXX
Show Map

Follow Edit Send Fmail Convert More

+ Add Tag

Summary Details Updates **Emails**

Key Fields

First Name	Mr. AXXXX
Last Name	AXXXX
Company	XXX
Lead Source	Sulek?
Website	www.XXX
Assigned To	
City	Bangalore
Country	India

Activities

+ Add To Do + Add Event

No pending activities

Comments

Post your comment here

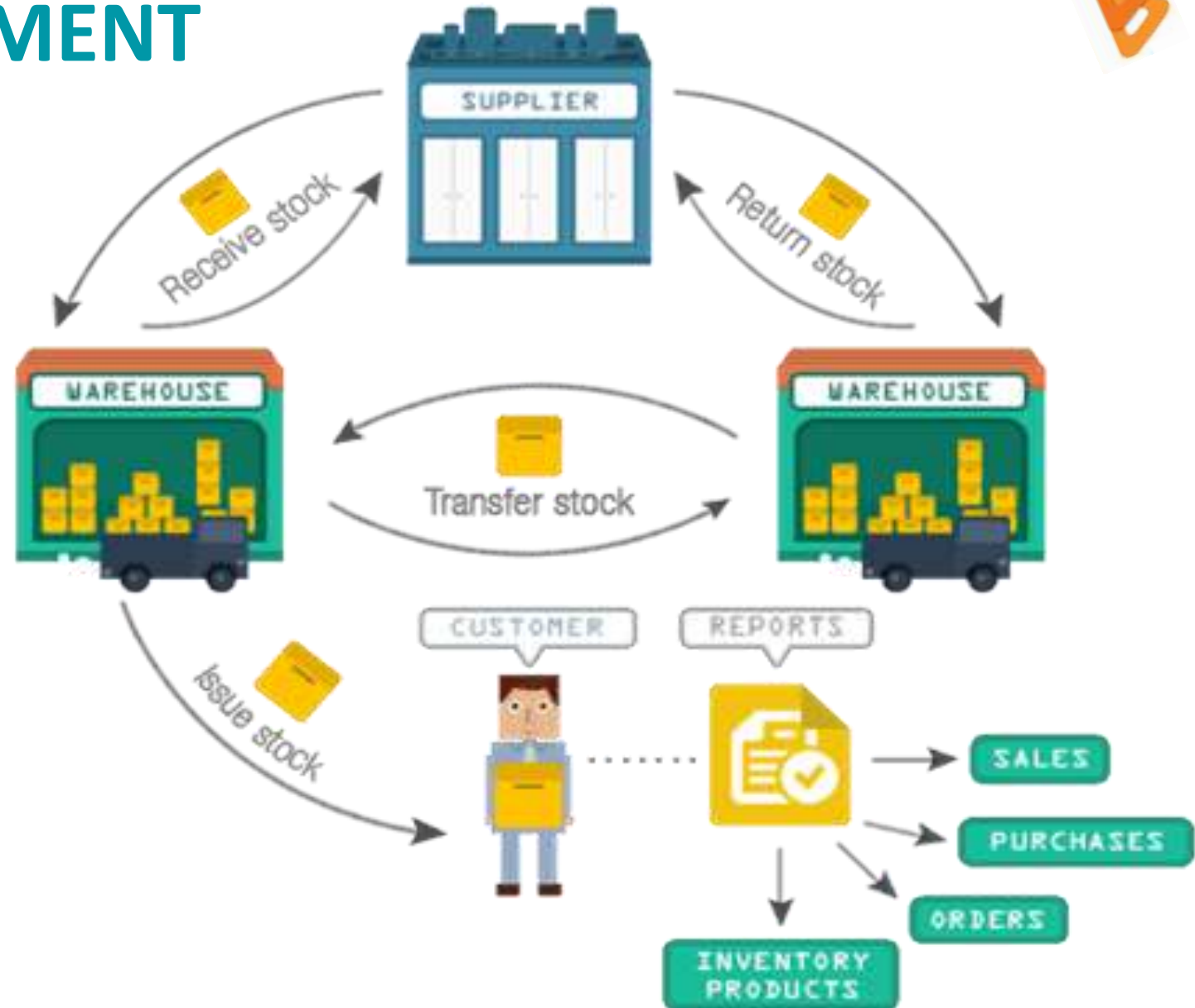
Attach Files

Post

Recent Comments

INVENTORY MANAGEMENT

- Create your product catalog with associated pricing structures and configure discounts and taxes—right within the CRM
- Create tasks for installation/delivery of products.
- Manage Stock Availability

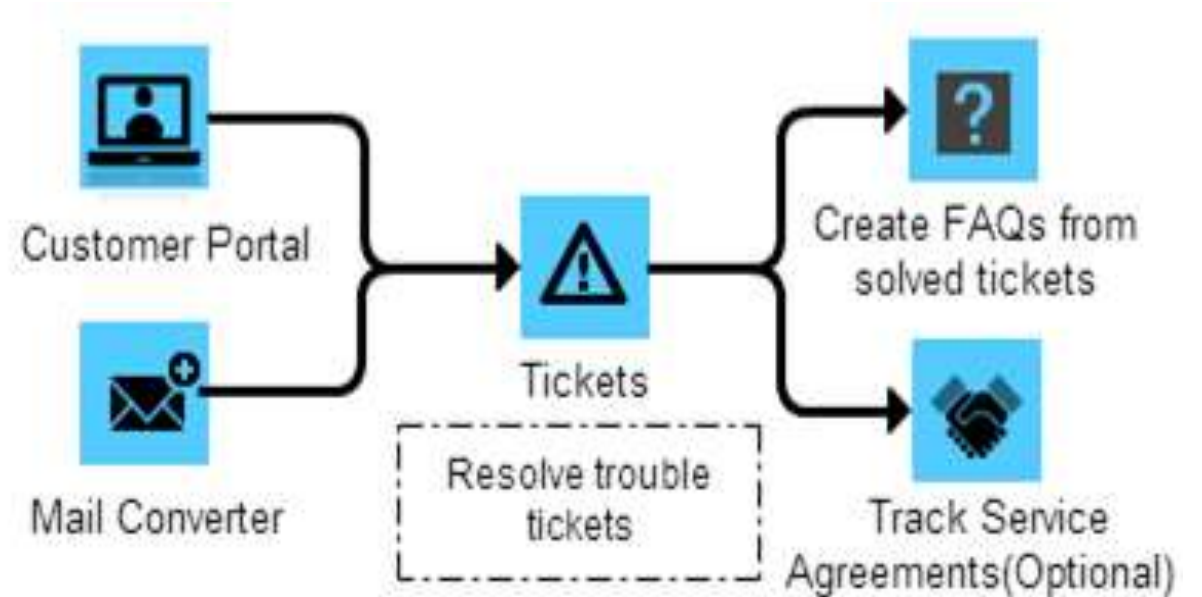


SERVICE MANAGEMENT



Biztechnosys CRM Service module will enable your Company to capture all the Customer issues related to the product purchased.

- Track Field Team and Increase Productivity
- Better Customer handling
- Proactive Customer service
- Increased service revenue
- Efficient service
- In-depth service analysis
- Improved service spares management
- Analyse Customer satisfaction
- Build Service Knowledge Base automatically



GEO-TAGGING



Geolocation is a set of tools that provides visualization and mapping insights to help sales and marketing reps track and analyze data about the location of their customers. Geolocation functionality is increasingly available for mobile devices, and Biztechnosys sees it becoming more common as CRM applications seek to offer a more complete view of customers and prospects.



OPTIMIZE SALES ROUTES

IMPROVE ANALYTICS

**GEOGRAPHICALLY-BASED
MARKETING**

EXPENSE MANAGEMENT



Biztechnosys CRM Expense Management Module will enable your Company to register all expenses made by Sales and Service Teams. Other Expenses incurred to procure inventory and execute the Order can also be recorded for each transaction. These expenses which are recorded User-wise will go through an approval process. Approving authority will be able to confidently approve the expense claim because system gives visibility Transaction-wise, Expense Date-wise and Expense Type-wise.



- Automate expense management
- Expenses are captured for each transaction
- Powerful approval mechanism to prevent errors
- Freedom to Field Team to book and claim expense from mobile device

The screenshot shows the 'Expense Details' page in a web application. The page has a dark sidebar on the left with navigation icons. The main content area is titled 'Expense Details' and includes a breadcrumb trail: 'Home > All Expenses > Expense Details'. There are user profile icons for 'ENGLISH' and 'Robert' in the top right. The page is divided into several sections:

- ADD EXPENSES**: A section for adding new expenses.
- Start Date ***: A date picker set to '21 Jan, 2021'.
- End Date ***: A date picker set to '21 Jan, 2022'.
- Activity Location**: A dropdown menu with options: 'Head Quarter', 'Ex Head Quarter', and 'Outstation'. 'Head Quarter' is selected.
- Expenses Type**: A dropdown menu with options: 'Travel', 'Food', 'Stay', and 'Mileage A'. 'Food' is selected.
- Upload Invoice**: A text input field with a 'Browse...' button.
- Total Expenses**: A text input field.
- Employee Detail**: A table showing details for the selected employee.

Type	Food
Start Date	21 Jan, 2021
End Date	21 Jan, 2022
Status	Approved
Activity Location	Head Quarter
City	Mini Metro
Total Expenses	230.0

ATTENDANCE MANAGEMENT



Let your agents mark their attendance with ease. Track agents when they check-in and check-out at the customer's location and update ticket status from one place.

- Attendance
- Leave
- Holidays
- Define a IN Time/Last Time for employee
- Full Calendar Report with Day, Month, Week wise.
- Real-time Time Tracking of Employee's Location





REPORTS

- Auto-generated reports providing a quick look at your sales health and track your metrics effortlessly.
- You can also create custom reports to track goals with ease of each team member separately.
- Create and Filter Sales Activity Reports to evaluate sales based on emails sent, calls made, appointments scheduled, and tasks completed.
- You can also export & share reports within your team as well as other dealers





CUSTOMER ENGAGEMENT TOOLS



- **In-built email integration:** Send emails directly from the CRM & track all your communication at one place
- **Email Templates:** CRM has pre-built email templates. It also enables you to create your own templates that can help you to automate emails and increase your productivity
- **SMS Notifier:** Keeps track of all sales calls and details, updated automatically into the CRM from your mobile

Thank you



QUESTIONS?

Biztechnosys

We bring in BEST of **BRAINS & TECHNOLOGY** Tools to realise your **BIZ GOALS**