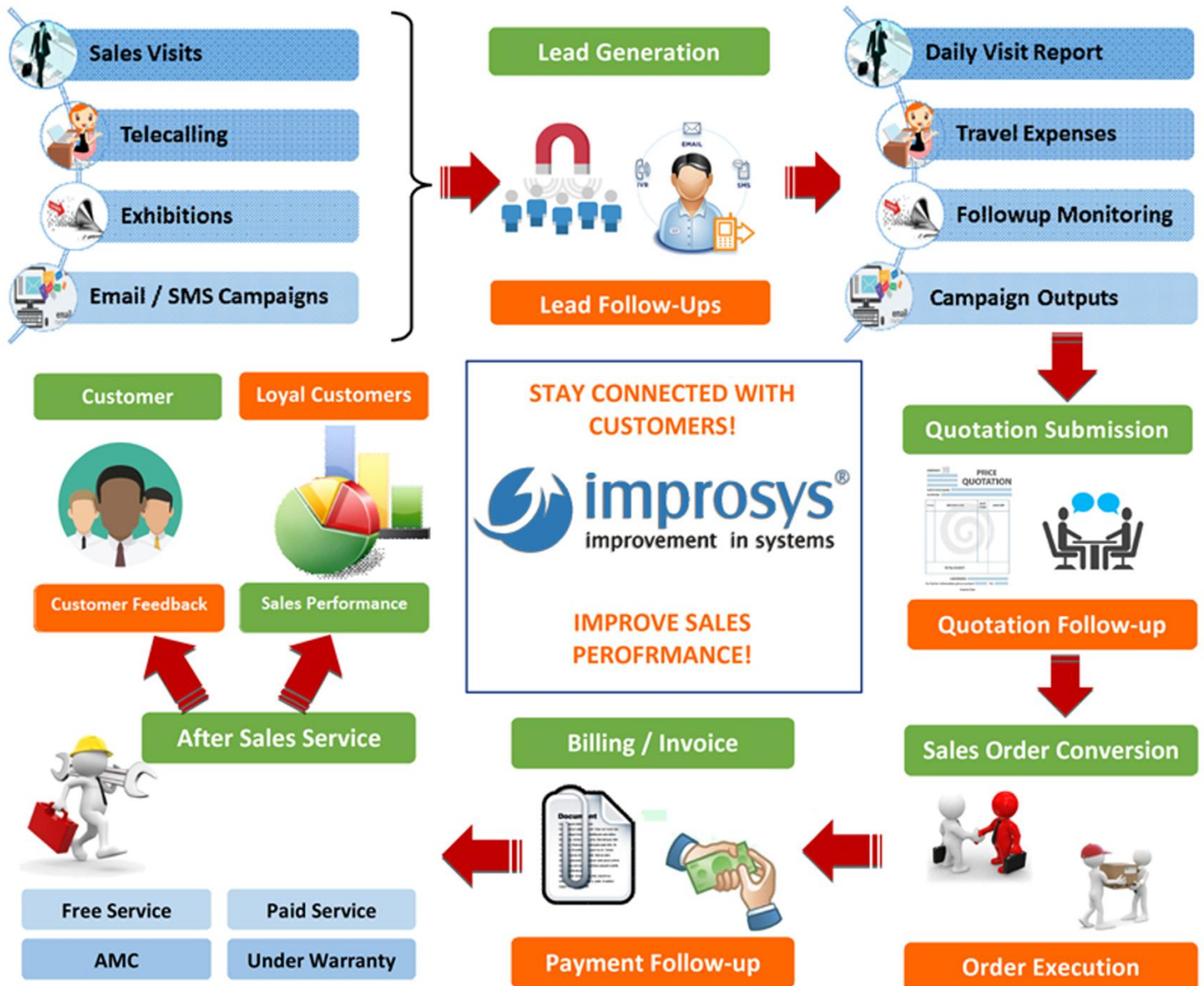


IMPROSYS CRM
Software



Customer Relationship Management Software

IMPROSYS CRM SOFTWARE -



Customer Relationship Management -

This relationship usually starts with

- marketing communications,
- sales



And continues till

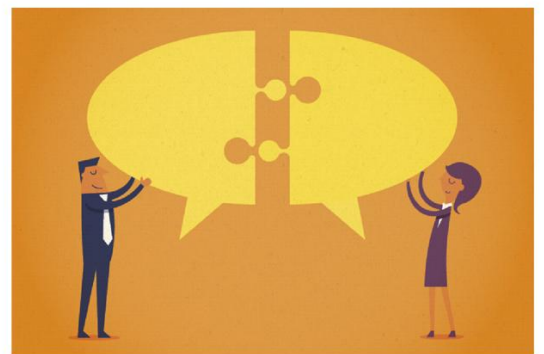
- customer service,
- fulfilled payments and
- customer feedback.



Need of CRM software -

Improsys CRM Help Customer Relationship by

IMPROVING COMMUNICATION WITH CUSTOMER



No Communication



Proper Communication

**Delay in
Communication**



**On-Time
Communication**

Wrong Communication



**Effective
Communication**

Need of CRM software -

Improsys CRM Help Customer Relationship by

FULFILLING WHAT'S COMMITTED



**Failure to deliver what's
promised**



Deliver what's promised

**Wrong payment
schedules**



On-Time Delivery

**Service schedules
not committed**



Customer satisfaction

Need of CRM software -

Improsys CRM Help Customer Relationship by

IMPROVE AFTER SALES SERVICE



Late replies to service queries



Prompt replies to enquiries

Poor service delivery



Good service delivery

Incomplete customer feedback



Ensure customer satisfaction with feedback

Need of CRM software -

Improsys CRM Help Customer Relationship by

IMPROVING PRODUCT QUALITY



Specifications not clear



Crystal clear specifications

Applications not mentioned



Applications clearly mentioned

Incorrect scope of supply



Correct scope of supply

Need of CRM software -

FOLLOW-UP FACTS



Business Statistics of Sales Personnel

48% of sales personnel never follow-up with a prospect.

25% of sales personnel make second follow-up and stop.

12% of sales personnel make third follow-up and stop.

Only 10% of the sales personnel make more than 3 contacts.

Sales Follow-Up Statistics

2% of sales are made in first contact.

3% of sales are made in second contact.

5% of sales are made in third contact.

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.

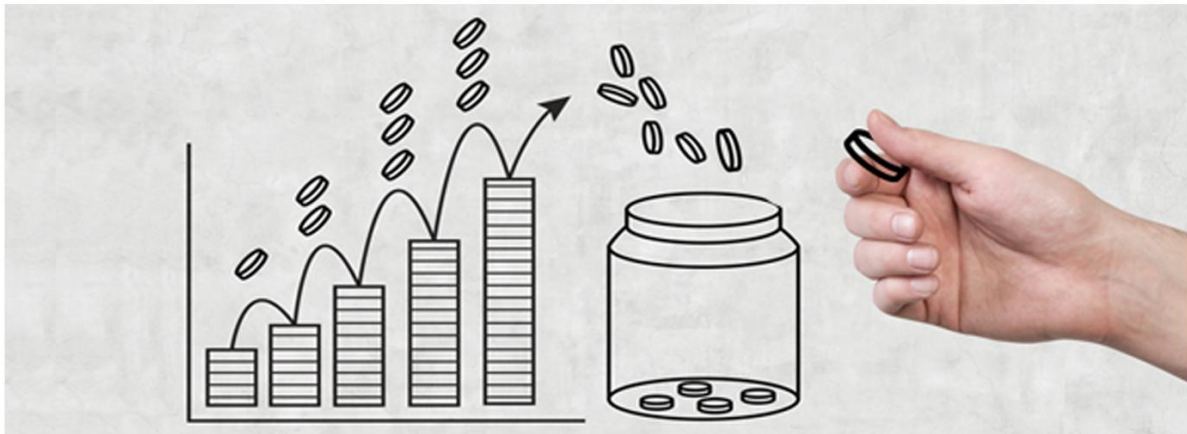
An average sales person makes only **2 attempts** to reach a prospect.



Need of CRM software -



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.

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.

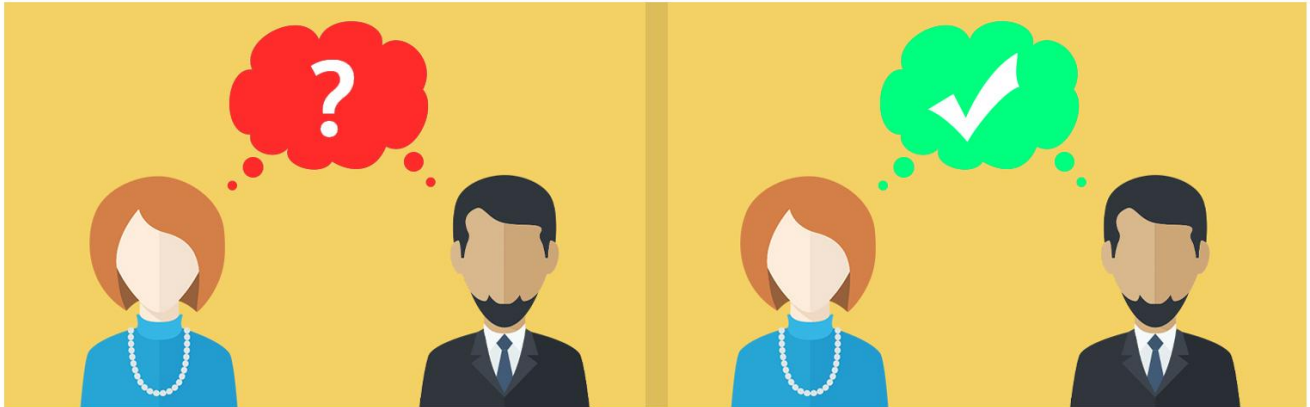
*Source: National Sales Executive Association



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

Need of CRM software -

PROPER COMMUNICATION FACTS



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.



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**.

Need of CRM software -

AFTER SALES SERVICING FACTS



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



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.



Need of CRM software -

INTERESTING CRM STATISTICS

Increase Sales by
up-to

29%

Increase Sales
productivity by
up-to

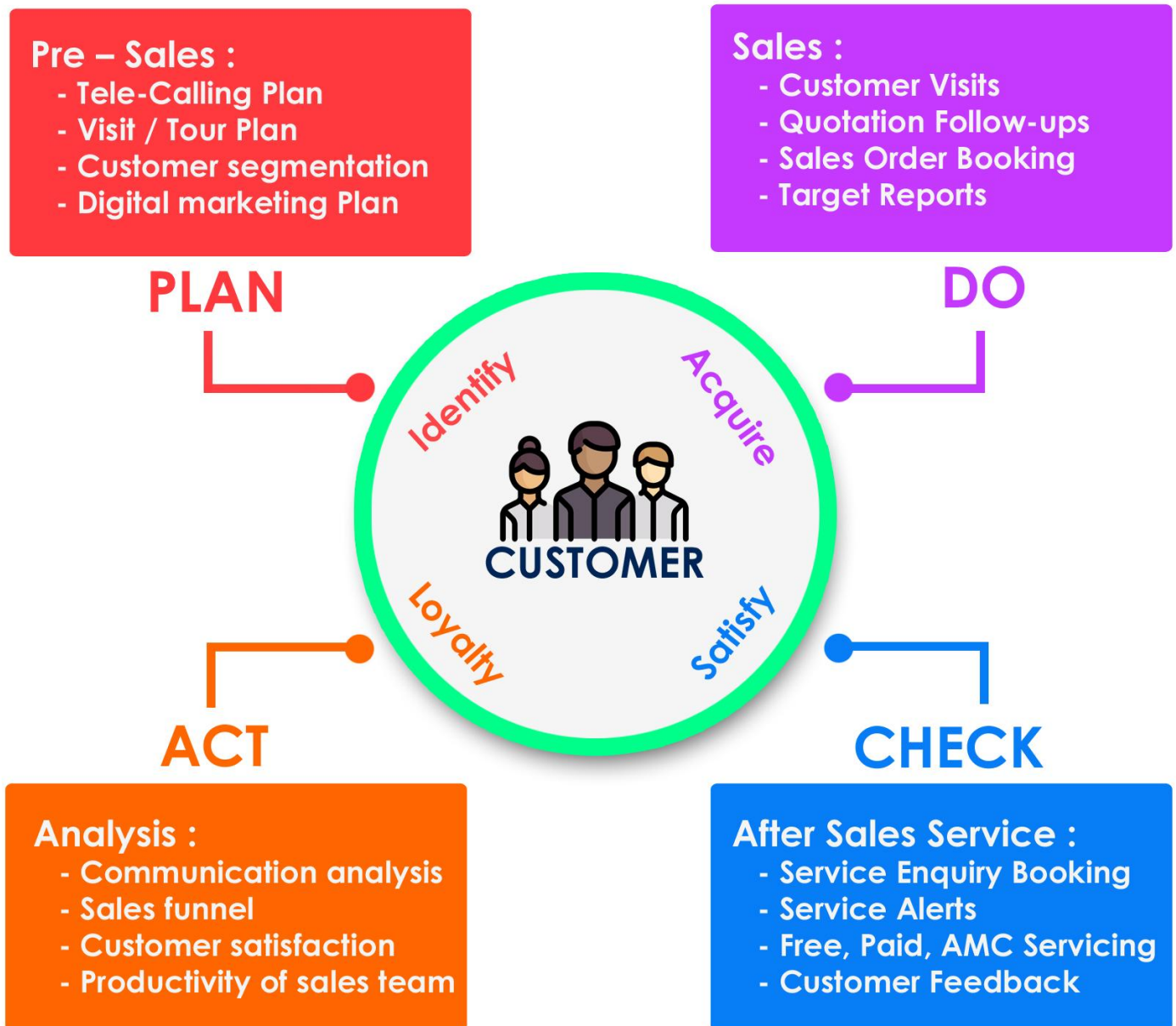
34%

Increase Sales
forecast accuracy
by

42%

IMPROSYS CRM

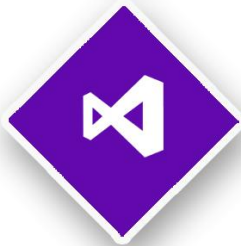
Follows the classic and proven efficient method of P-D-C-A.



Features -



Web based multi-user software. Can be accessed through internet as well as intranet.



Latest technology of Visual Studio 2017 and .net framework 4.0 used.



Compatibility with Excel, Word and PDF.



Software is secured at an access level and data view level.



Follow-up dashboard with email and sms allows.



Supports email and SMS sending to Customers .

Features -



Export data to Tally Accounting Software



Helps to serve your clients efficiently.



Simplicity and User friendliness.



Helps to improve your daily routine work and pending task.



Improves your productivity by avoiding the repetitive task.



All relevant data at ease. Faster data retrieval.

Benefits -

Benefits 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

Benefits For Employees



- ◆ Reduce work stress by effective time management.
- ◆ Save time on routine work
- ◆ Eliminate repetitive manual tasks – send reports through software
- ◆ More focus of productive tasks

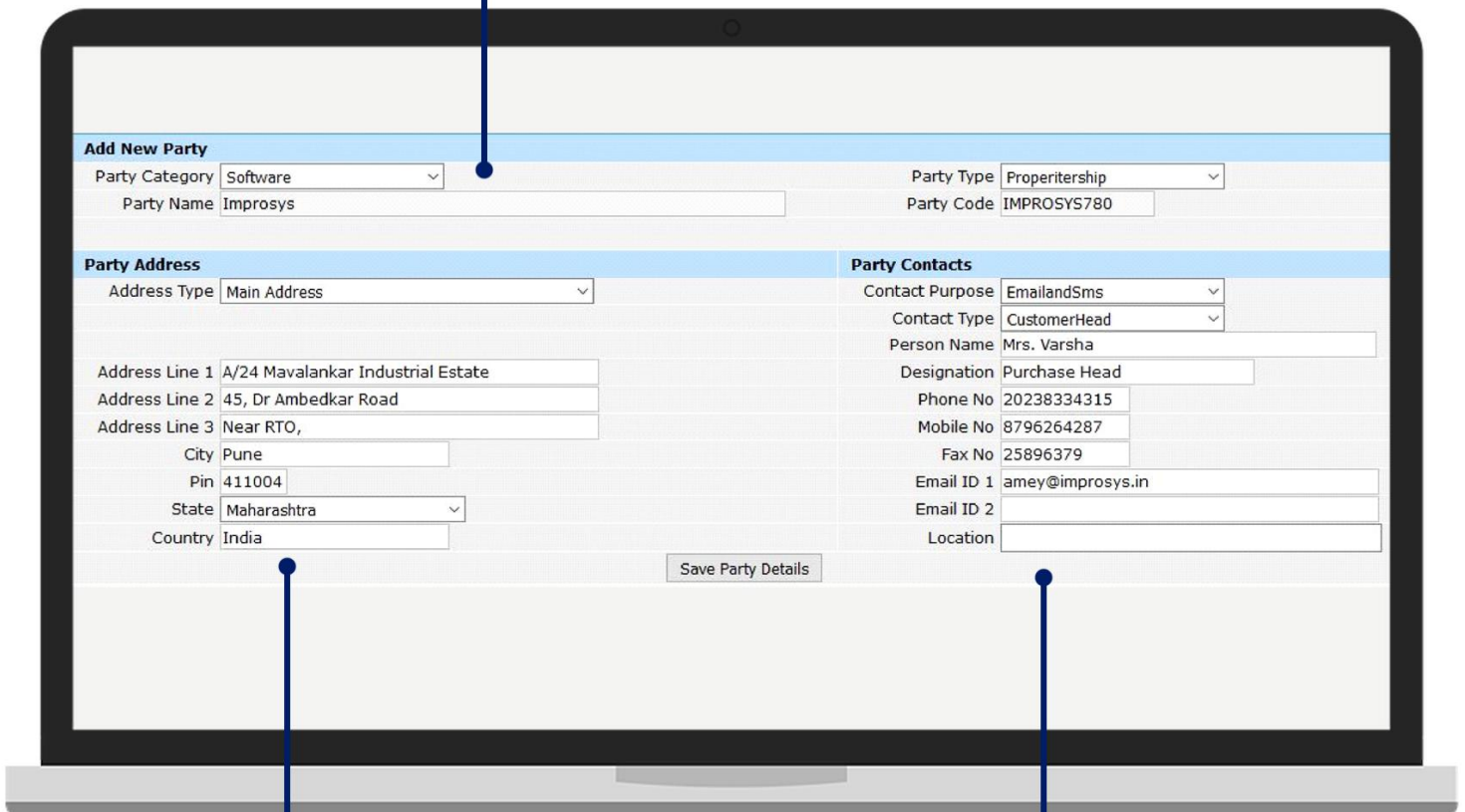
Contact Management : **Features** -



- ◆ 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. 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. GST.
- ◆ Document can be send directly on email to customer.

Defining Organization -

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



Add New Party	
Party Category	Software
Party Name	Improsys
Party Type	Proprietorship
Party Code	IMPROSYS780

Party Address	Party Contacts
Address Type	Contact Purpose
Main Address	EmailandSms
Address Line 1	Contact Type
A/24 Mavalankar Industrial Estate	CustomerHead
Address Line 2	Person Name
45, Dr Ambedkar Road	Mrs. Varsha
Address Line 3	Designation
Near RTO,	Purchase Head
City	Phone No
Pune	20238334315
Pin	Mobile No
411004	8796264287
State	Fax No
Maharashtra	25896379
Country	Email ID 1
India	amey@improsys.in
	Email ID 2
	Location

Save Party Details

Enter contact address

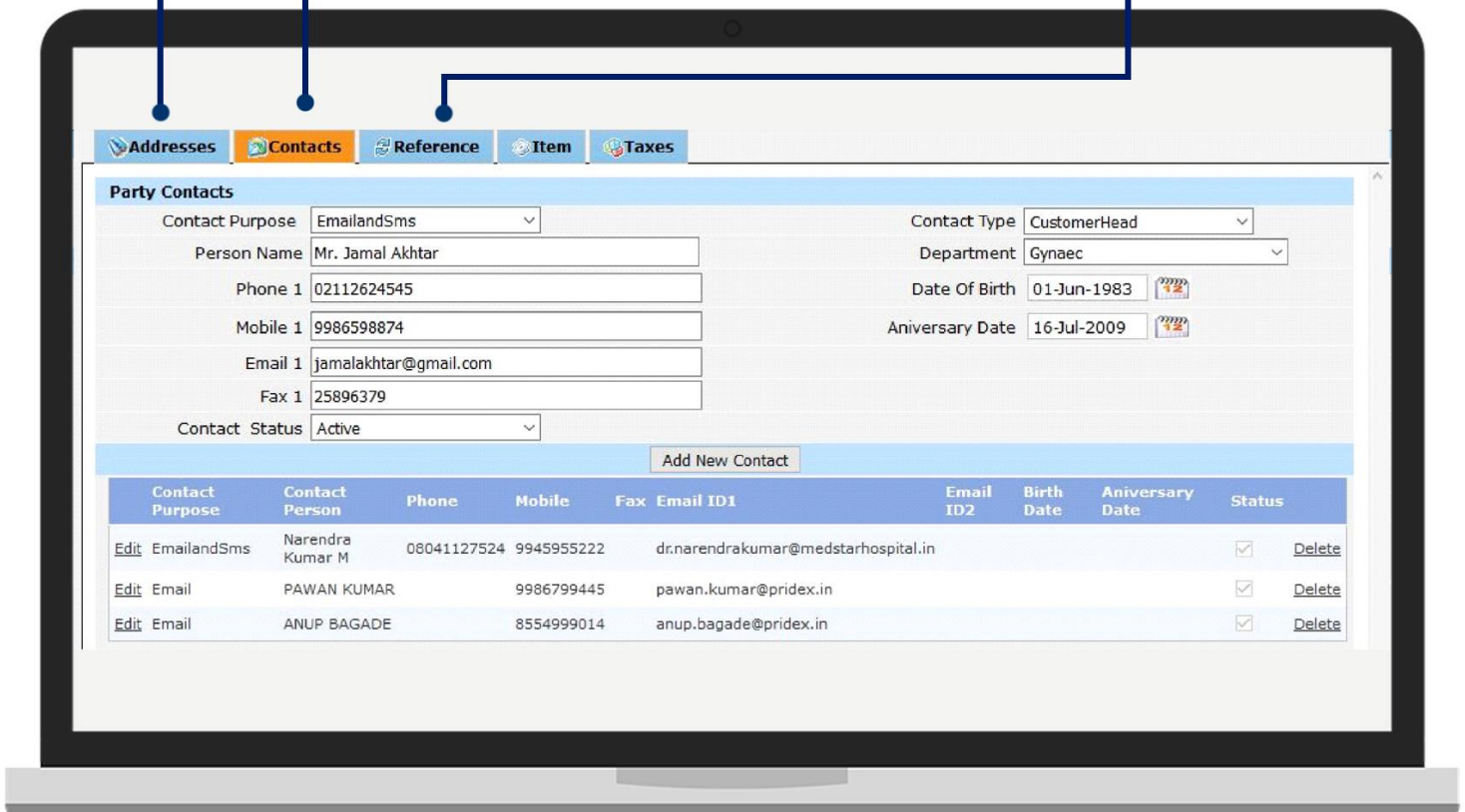
Contact person details such as email id, phone number etc.

Contact Management -

Facility to add Multiple addresses against a organization

Facility to add Multiple contact persons against a organization

Add commercial details such as GST No., PAN No., Vendor Code.

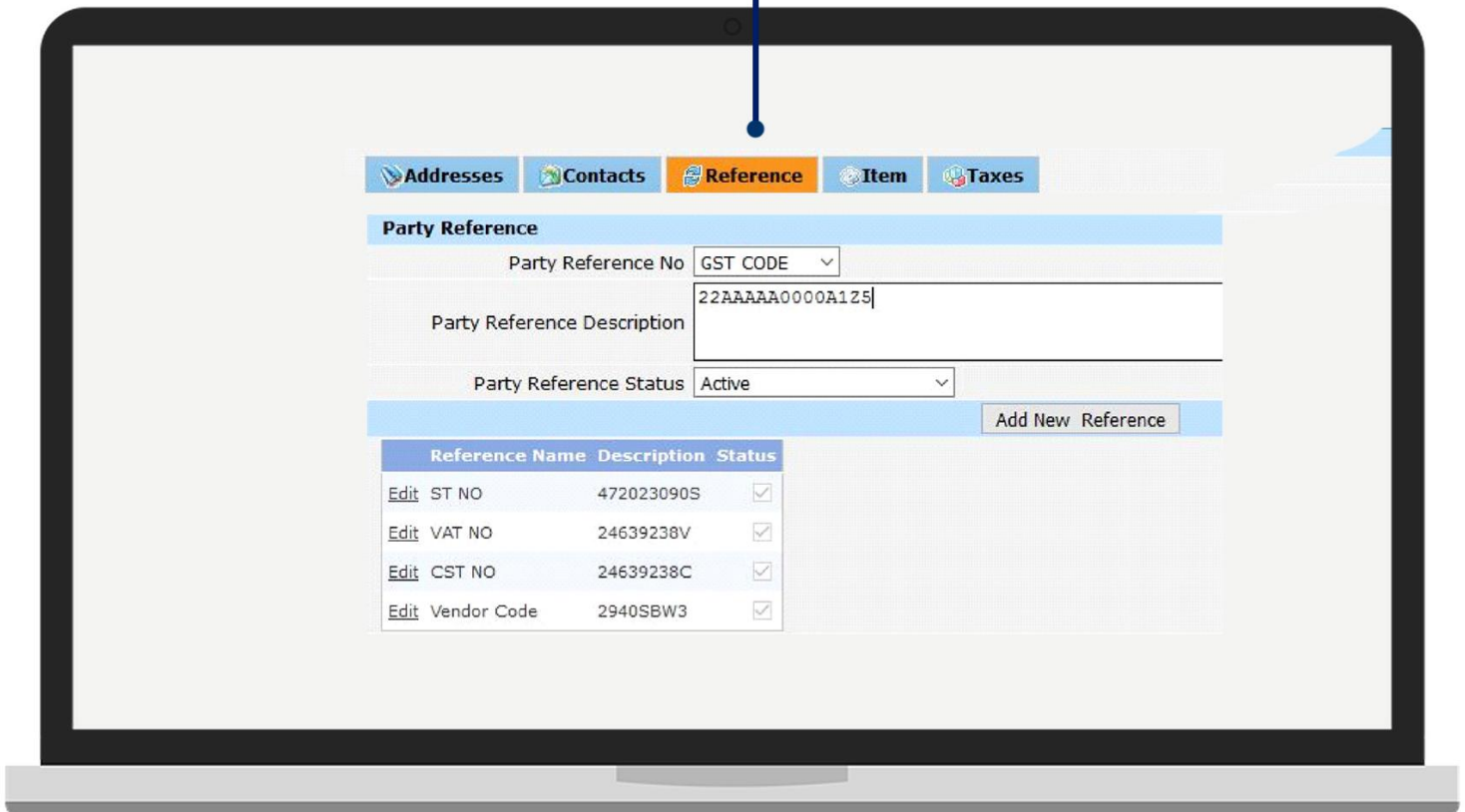


The screenshot displays the 'Party Contacts' management interface. At the top, there are tabs for 'Addresses', 'Contacts', 'Reference', 'Item', and 'Taxes'. The 'Contacts' tab is active, showing a form to add a new contact. The form includes fields for 'Contact Purpose' (set to 'EmailandSms'), 'Contact Type' (set to 'CustomerHead'), 'Person Name' (Mr. Jamal Akhtar), 'Department' (Gynaec), 'Phone 1' (02112624545), 'Mobile 1' (9986598874), 'Email 1' (jamalakhtar@gmail.com), 'Fax 1' (25896379), 'Date Of Birth' (01-Jun-1983), 'Aniversary Date' (16-Jul-2009), and 'Contact Status' (Active). Below the form is an 'Add New Contact' button. A table below the form lists existing contacts with columns for 'Contact Purpose', 'Contact Person', 'Phone', 'Mobile', 'Fax', 'Email ID1', 'Email ID2', 'Birth Date', 'Aniversary Date', and 'Status'. Each row has an 'Edit' link and a 'Delete' button.

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				<input checked="" type="checkbox"/> Delete
Edit Email	PAWAN KUMAR		9986799445		pawan.kumar@pridex.in				<input checked="" type="checkbox"/> Delete
Edit Email	ANUP BAGADE		8554999014		anup.bagade@pridex.in				<input checked="" type="checkbox"/> Delete

Details Management -

Add commercial details such as
GST No., PAN No., Vendor Code.



The screenshot displays the 'Reference' tab in the software interface. The 'Party Reference' section includes the following fields:

- Party Reference No: GST CODE (dropdown)
- Party Reference Description: 22AAAAA0000A1Z5
- Party Reference Status: Active (dropdown)

An 'Add New Reference' button is located to the right of the status dropdown.

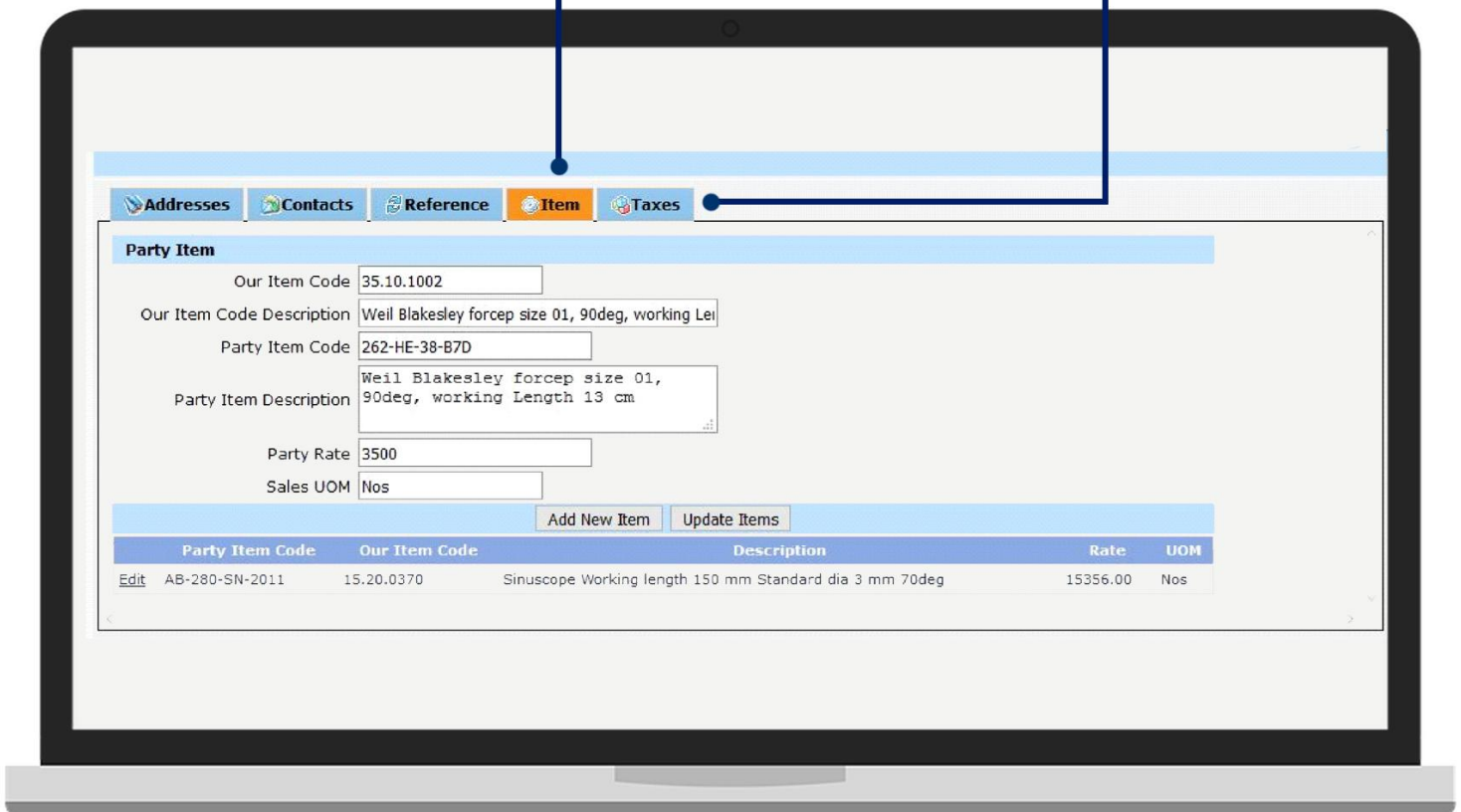
Below the form is a table listing existing references:

	Reference Name	Description	Status
Edit	ST NO	472023090S	<input checked="" type="checkbox"/>
Edit	VAT NO	24639238V	<input checked="" type="checkbox"/>
Edit	CST NO	24639238C	<input checked="" type="checkbox"/>
Edit	Vendor Code	2940SBW3	<input checked="" type="checkbox"/>

Party Product Management -

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

Define tax structure for each organization defined in the system.



The screenshot displays the 'Party Item' management interface. The top navigation bar includes 'Addresses', 'Contacts', 'Reference', 'Item' (highlighted), and 'Taxes'. The 'Party Item' form contains the following fields:

- Our Item Code: 35.10.1002
- Our Item Code Description: Weil Blakesley forcep size 01, 90deg, working Lei
- Party Item Code: 262-HE-38-B7D
- Party Item Description: Weil Blakesley forcep size 01, 90deg, working Length 13 cm
- Party Rate: 3500
- Sales UOM: Nos

Below the form are buttons for 'Add New Item' and 'Update Items'. A table at the bottom lists existing items:


	Party Item Code	Our Item Code	Description	Rate	UOM
Edit	AB-280-SN-2011	15.20.0370	Sinuscope Working length 150 mm Standard dia 3 mm 70deg	15356.00	Nos

Contact Management -

Detail Party Report

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 Nigode Chakan Tal - Khed	Pune	Maharashtra	India	410501	9967836111

Party Contacts:

SrNo	Contact Purpose	Contact Person Name	Person Person Designation	Contact Person Email	Contact Person PhoneNo	Person Mobile	Contact Type	Contact Location
1	Email and Sms	Mr. Narendra Palkar	Chairman	palikannarendra@mahindra.com		9967836111	Customer Head	
2	Email and Sms	Mr. P. K. Pavri	Director	pavri@ahuramazdagroup.com		919820056544	Customer Head	
3	Email	Mr. Omprakash Sharma	Accounts	account@nihva.com		8380090880	Accounts	
4	Email	Mr. Anil Kumar	Project Co-ordinator	projects@nihva.com		8551095330	Projects	
5	Email	Ms. Shubra 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	AAFCM0476N/XM002


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

Party Summary Report

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



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, Sital Indl Est., Beside Omega heritage, DSK Viahwa 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 Rebde	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	ACCUWEIGS42	Accuweigh automation & solutions Pvt. Ltd	Shed no.2, Ayush Indl Estate survey no.23/3/1, Masuje Narhe, Near Abhinav Pharmacy College	Pune	Maharashtra	411041	Saurabh Bhagwat	9922000953
9	Industrial	Propentership	ACHIEVEH198	Achieve Hydraulics & Pneumatics	Get No. 1567, Chikhali - Talawade Road, Shelar-Wasti, Chikhali, Pune	Pune	Maharashtra	412114	Mr R.P. Sonawane	9922449243

Sales Team Management: **Features** -

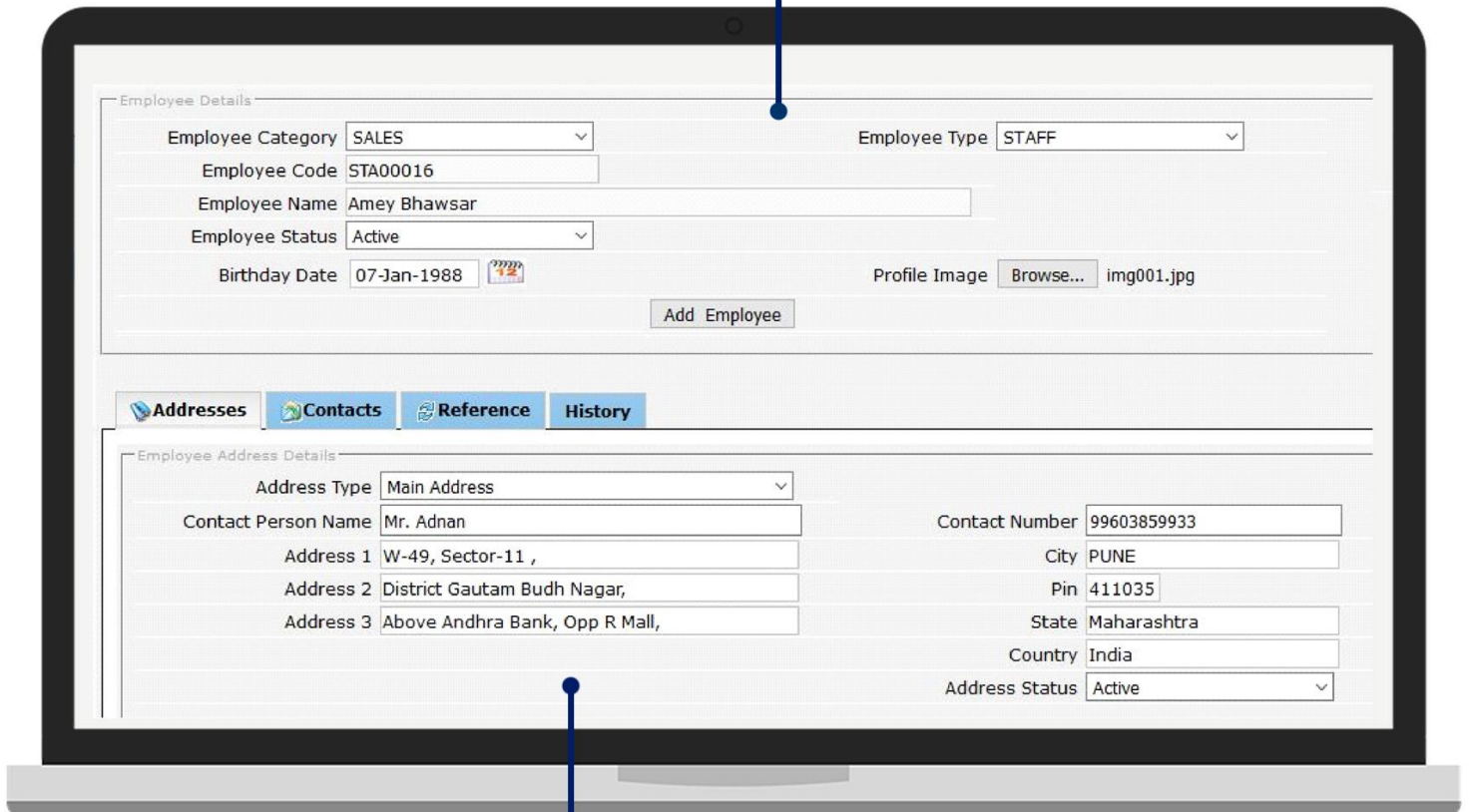


- ◆ Multiple users with different roles can be created.
- ◆ Separate login ID and password for each user.
- ◆ Define Role Rights as well as user's Rights.
- ◆ Reset or Change the password for selected user.
- ◆ User configuration for sending Email & SMS.
- ◆ User Logs report.
- ◆ Defining user hierarchy makes reporting easy for sales executives.



User Entry -

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



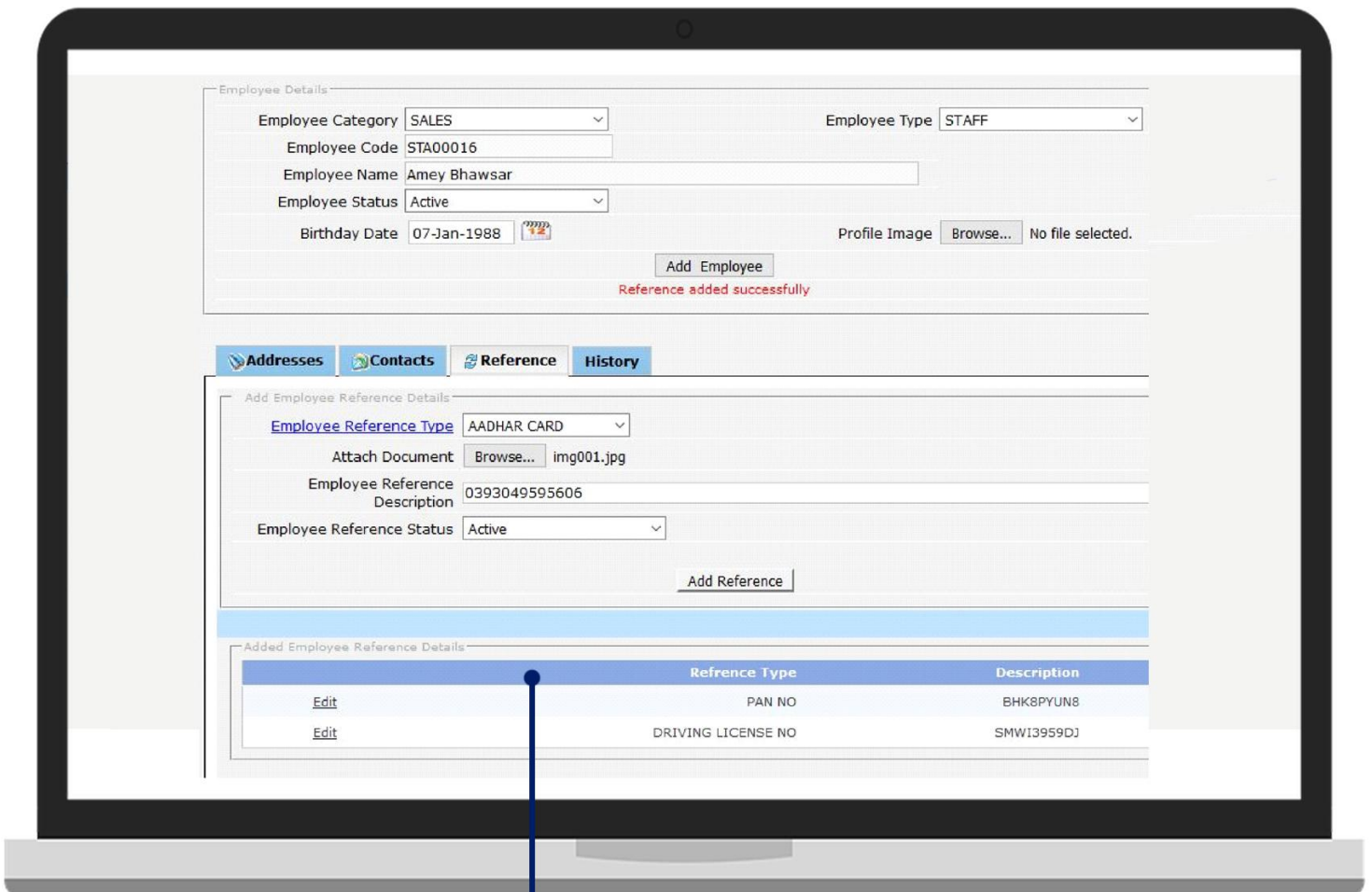
The screenshot displays the 'Employee Details' form within the CRM software. The form is divided into two main sections: 'Employee Details' and 'Employee Address Details'. The 'Employee Details' section includes fields for Employee Category (SALES), Employee Code (STA00016), Employee Name (Amey Bhawar), Employee Status (Active), Birthday Date (07-Jan-1988), Employee Type (STAFF), and Profile Image (img001.jpg). An 'Add Employee' button is located at the bottom of this section. The 'Employee Address Details' section is accessed via a tabbed interface with options for Addresses, Contacts, Reference, and History. It contains fields for Address Type (Main Address), Contact Person Name (Mr. Adnan), Contact Number (99603859933), City (PUNE), Pin (411035), State (Maharashtra), Country (India), and Address Status (Active). The form is presented on a laptop screen.

Employee Details	
Employee Category	SALES
Employee Code	STA00016
Employee Name	Amey Bhawar
Employee Status	Active
Birthday Date	07-Jan-1988
Employee Type	STAFF
Profile Image	Browse... img001.jpg
<button>Add Employee</button>	

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
Address Status	Active

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

User Entry -



The screenshot shows a web application interface for entering employee details and references. The top section, titled "Employee Details", contains fields for Employee Category (SALES), Employee Code (STA00016), Employee Name (Amey Bhawsar), Employee Status (Active), Birthday Date (07-Jan-1988), Employee Type (STAFF), and a Profile Image upload button. Below this is an "Add Employee" button and a success message "Reference added successfully".

The bottom section, titled "Add Employee Reference Details", has tabs for Addresses, Contacts, Reference, and History. The Reference tab is active, showing fields for Employee Reference Type (AADHAR CARD), Attach Document (img001.jpg), Employee Reference Description (0393049595606), and Employee Reference Status (Active). An "Add Reference" button is at the bottom of this section.

Below the form is a table titled "Added Employee Reference Details" with two columns: Reference Type and Description. It lists two entries: PAN NO (BHK8PYUN8) and DRIVING LICENSE NO (SMWI3959DJ). Each entry has an "Edit" link to its left.

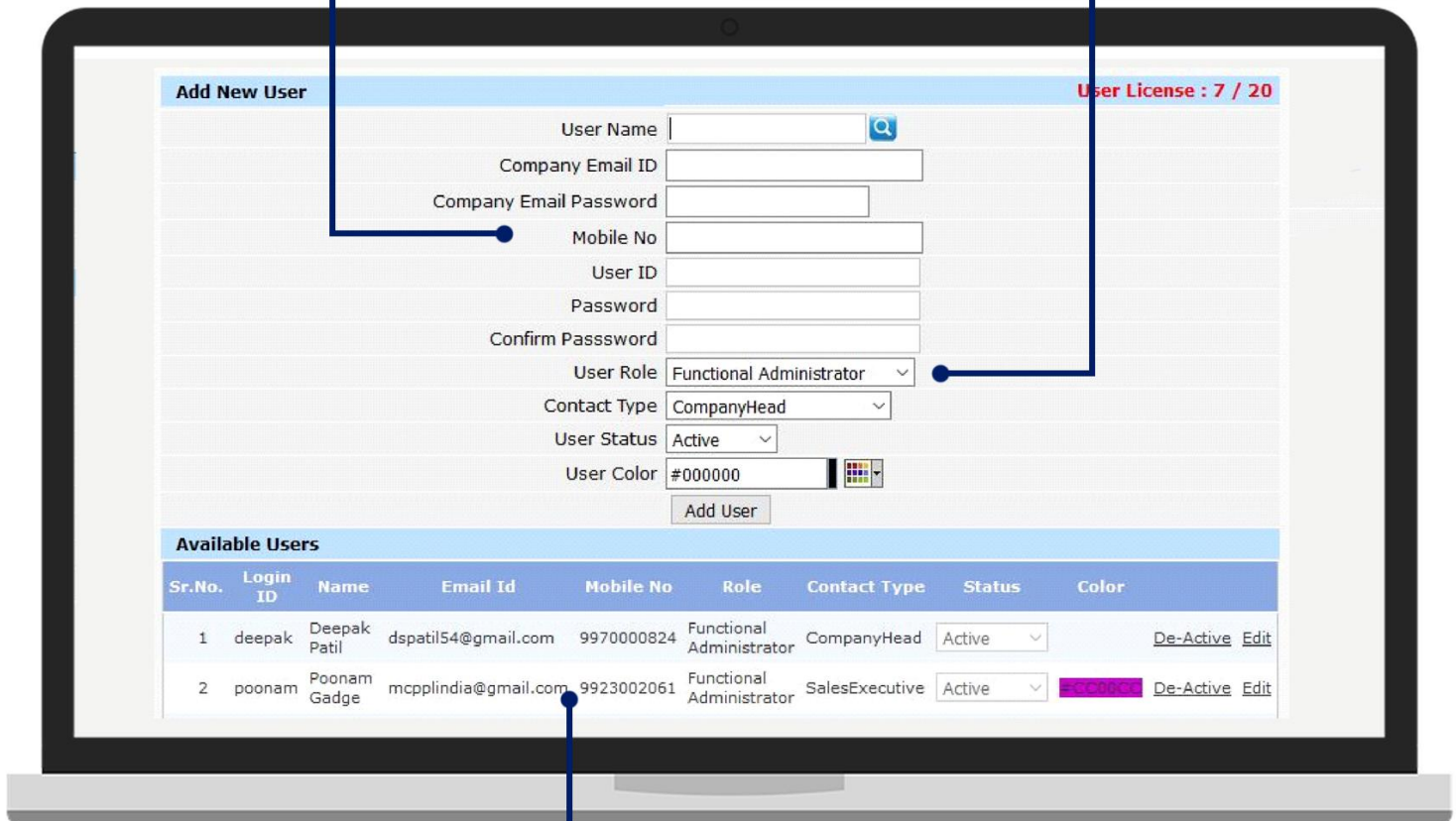
	Reference Type	Description
Edit	PAN NO	BHK8PYUN8
Edit	DRIVING LICENSE NO	SMWI3959DJ

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

User Entry -

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.



Add New User User License : 7 / 20

User Name

Company Email ID

Company Email Password

Mobile No

User ID

Password

Confirm Password

User Role

Contact Type

User Status

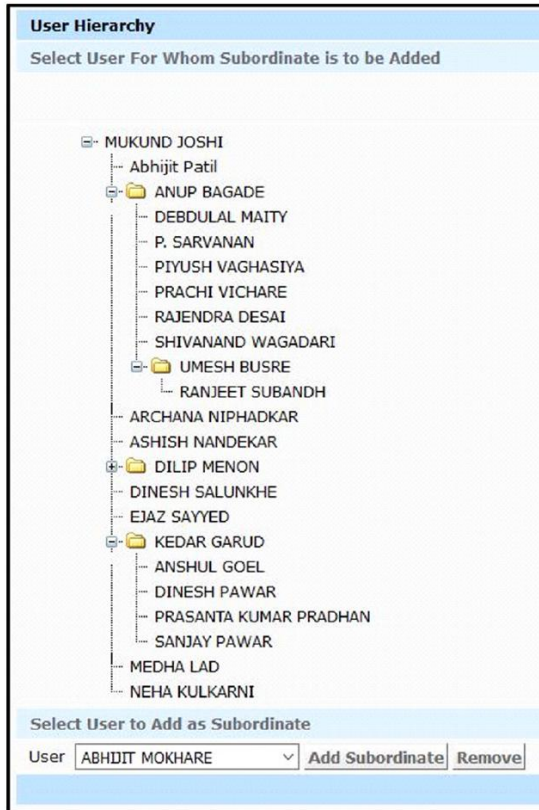
User Color

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	mcplindia@gmail.com	9923002061	Functional Administrator	SalesExecutive	Active	De-Active Edit

List view of currently active users.

User Hierarchy -



- Create company hierarchy .
- Control viewing of documents through company hierarchy.
- Daily reporting on the basis of hierarchy.
- Flexible hierarchy creation.

User-wise access of screens

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

User:

Users Role:

- ☒ Home
- ☒ Follow up
 - ☐ Enquiry Follow up
 - ☒ Task Dashboard
 - ☒ Task Calendar
 - ☒ Task MIS
 - ☒ Followup MIS
- ☒ Masters
 - ☒ Item Masters
 - ☒ Party Masters
 - ☒ Terms Master
 - ☐ Employee Master
 - ☒ Task Masters
 - ☒ Department Master
- ☒ Enquiry
 - ☒ New Enquiry
 - ☐ Edit Enquiry
 - ☒ View Enquiry Document
 - ☐ View Enquiry References
 - ☐ Enquiry MIS
 - ☐ Enquiry Win MIS
 - ☐ Periodic Enquiry Lost Reprot
 - ☐ No Enquiry Since Report
- ☐ Visit Management
- ☒ Order Management

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.

Visit / Tour Management : Features -



- ◆ Plan and update visits with ease and no jargons.
- ◆ Send DSR reports directly on email through software.
- ◆ Feature to add expenses done during the visit for quicker reimbursement processing.
- ◆ Instant conversion to lead from the same screen.
- ◆ Facility to upload documents against a visit or expenses done.
- ◆ Get in-detail reports of visits and expenses.

Visit / Tour Management : Report -

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. discussed on CRS, agilent profile, customer is not happy with logistics, need to send material on priority, interested in DNA Sequencing, and picomax master mix.	YES	Dear TS team/Dipti - Please send quote for DNA Sequencing - Rs. .../ sample will be 10 at time. Dear Customer support / snehal/snehal - kindly send quote for tag 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,		presently he is working on new project, he has raised new per master mix req.	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			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	Warm call	BioResource Life Sciences, no		Sybr Green Requirement	YES	Send Quote	no	0	0	0
<ul style="list-style-type: none"> Followup Calls-1 Cold Call-1 Hot call-1 Warm call-1 											Total KMs		0			
<ul style="list-style-type: none"> No. of visit done- 4 No. of enq. generated- 4 											Total		0			

Expenses In Tour : Report -

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	Incidental	Allowance	Travelling	Others	Remark	Document Link
1	CAE1000006	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)

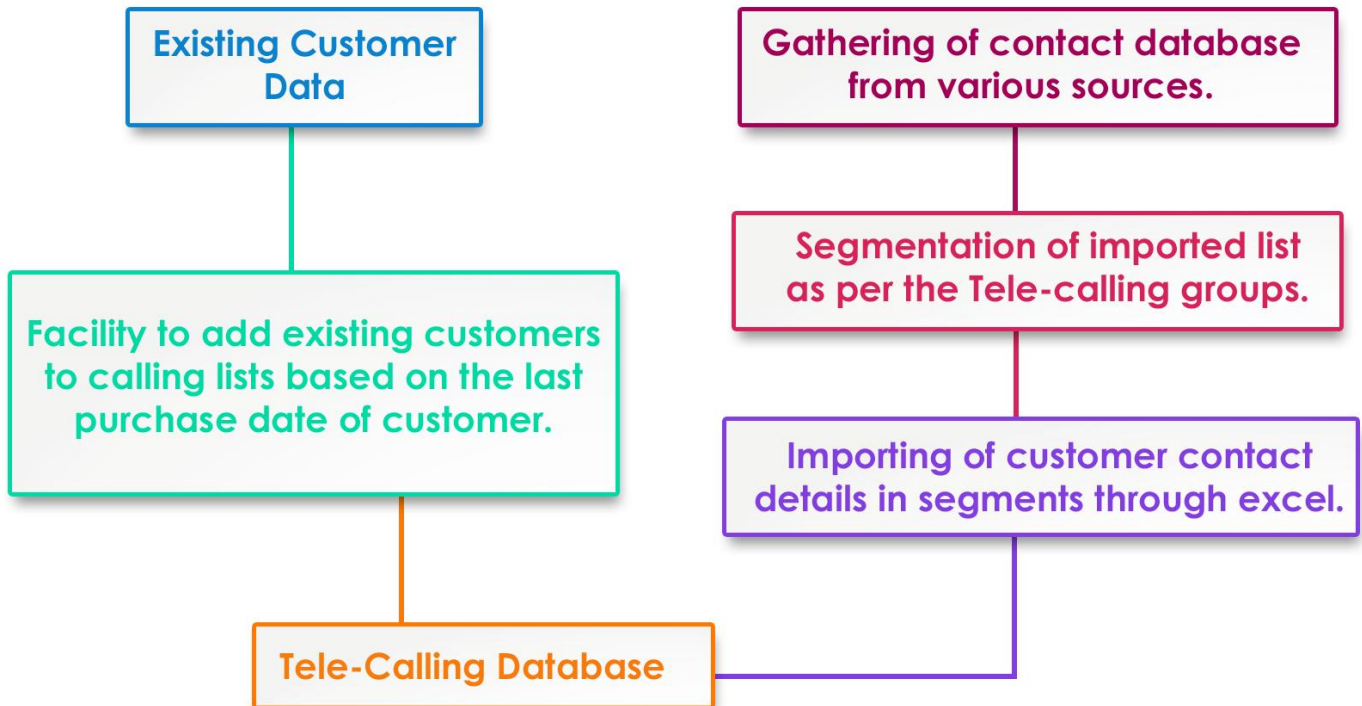
Visit Analysis -



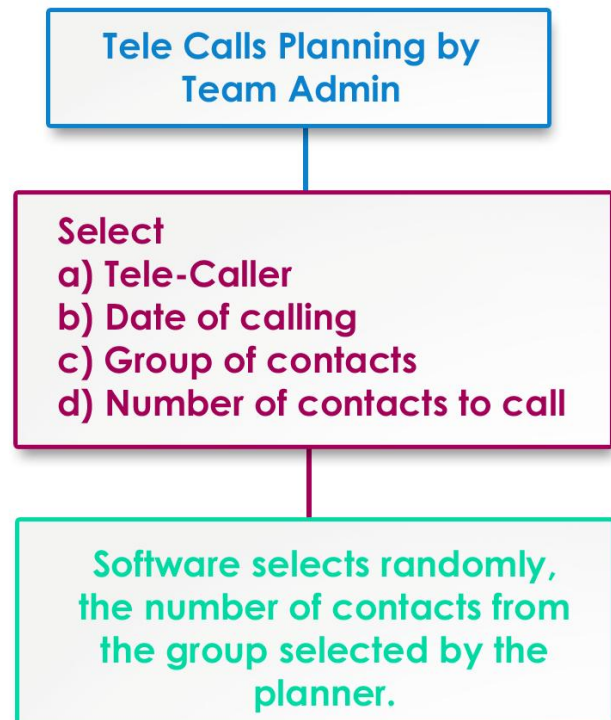
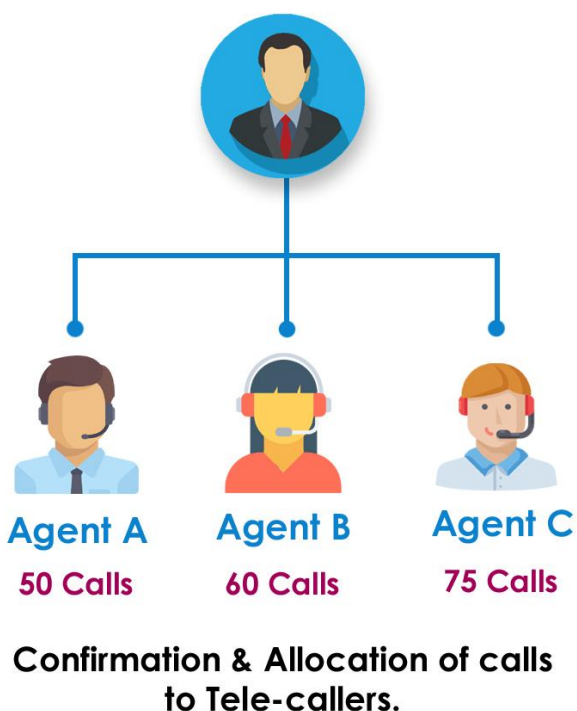
- ◆ Daily visit report on emails.
- ◆ Visit vs. Expenses tracking
- ◆ Documents managed centrally.
- ◆ Sales person wise visit reports.
- ◆ Summarized visit reports.
- ◆ No preparing lengthy excel sheets for visit reporting .
- ◆ Track and control expenses.
- ◆ View documents at any moment of time.
- ◆ Analysis of Visits done vs. Leads generated.
- ◆ Visit counts for overview of visit reporting.



Tele-Calling : Data Importing -



Tele-Calling : Call Management -



Tele-Calling : Actual Calling -



Convert your call into a lead with a click of a button.

Book sales order instantly and carry out all the payment transactions seamlessly

Today Pending Calls

Till Pending Calls

Till pending Call: 11

Till Completed Call: 4

Search Item

FAQ

Script

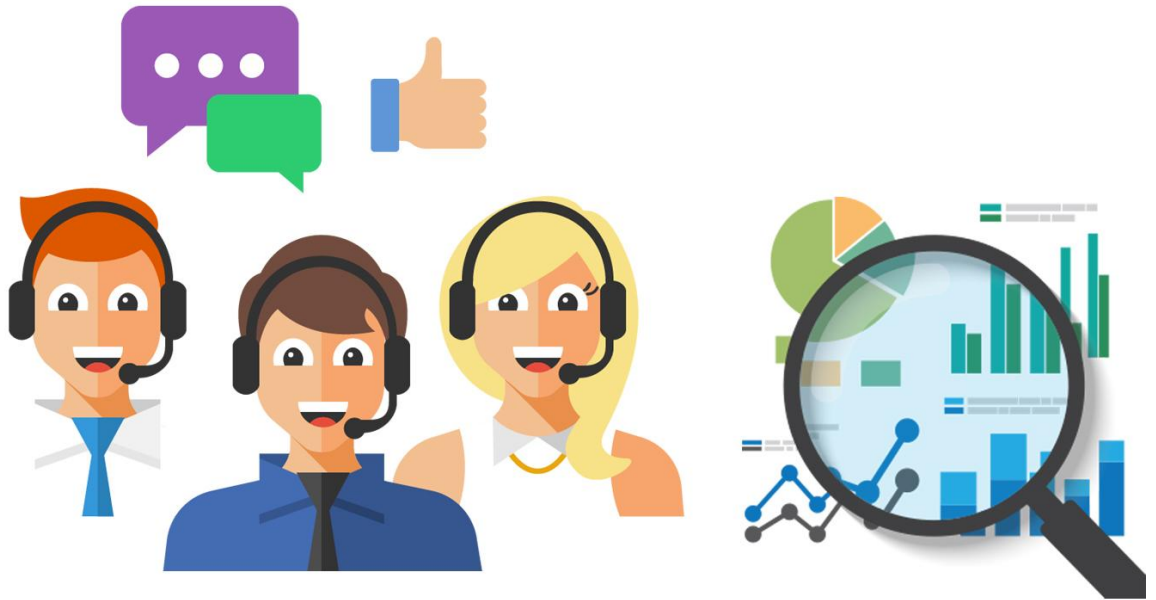
#	ContactName	Mobile	Email	Address	Remark	CallType	Lead	Order	Transfer	History	Cancel
1	Joshi Trading Company	234521212223	abhijeet@gmail.com	Akurdi3 A-wing ganesh Pune Maharashtra 43112		Inbound	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>

User can transfer call to some other person or to himself on some other date.

Track previous orders, conversation logs with a customer with a click of a button.

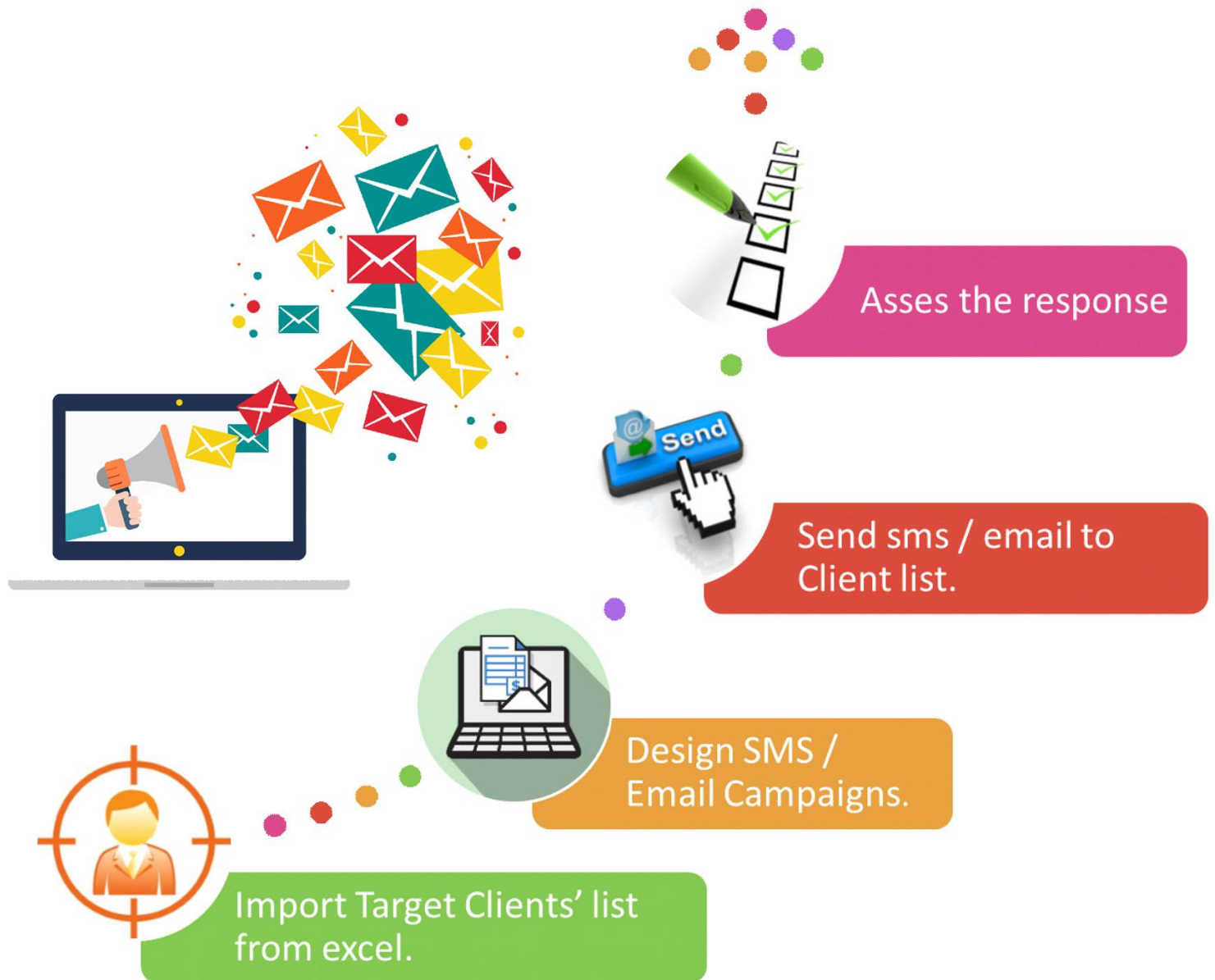
Cancel your calls along with customised reasons for cancellation

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

Lead Generation : SMS / E-Marketing -



Lead Management : **Benefits** -



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.

Lead Follow-up Dashboard -

Various filtering criteria for ease of operations

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	Select					
LD/16-17/4364/28	Harshada Jagade	In Progress	Harshada Jagade	12/Dec/16	14/Dec/16	-1	Magnum VVM Group	<input type="checkbox"/>	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	<input type="checkbox"/>	Show	Update	Convert-EQ	
LD/16-17/4355/28	Harshada Jagade	Draft	Harshada Jagade	12/Dec/16	12/Dec/16	1	Uday Instruments	<input type="checkbox"/>	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	<input type="checkbox"/>	Show	Update	Convert-EQ	
LD/16-17/4319/28	Harshada Jagade	Draft	Harshada Jagade	08/Dec/16	08/Dec/16	5	Vaibhav Traders	<input type="checkbox"/>	Show	Update	Convert-EQ	
LD/16-17/4304/28	Harshada Jagade	In Progress	Harshada Jagade	07/Dec/16	10/Dec/16	3	Sadguru Enterprises	<input type="checkbox"/>	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	<input type="checkbox"/>	Show	Update	Convert-EQ	
LD/16-17/4300/28	Harshada Jagade	In Progress	Harshada Jagade	07/Dec/16	09/Dec/16	4	JMD Foods	<input type="checkbox"/>	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	<input type="checkbox"/>	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	<input type="checkbox"/>	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	<input type="checkbox"/>	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	<input type="checkbox"/>	Show	Update	Convert-EQ	

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.

Lead Follow-up -

Quick view of the document for reference purpose

Set next 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

Previous follow-up details

View previously completed follow-ups with the customers

Record all the discussions done with the customer

Follow-up : Lead Analysis -

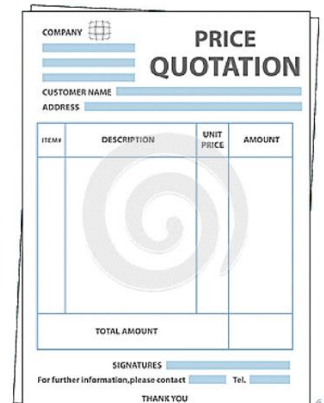



- ◆ Product wise leads report
- ◆ Source wise leads generated (Emails, SMS, Visits, Exhibitions, etc.)
- ◆ Area wise, Zone wise leads generated.
- ◆ Sales person wise leads generated.
- ◆ Summarized leads reports.
- ◆ Pending Leads analysis
- ◆ Leads generated vs Quotation submitted analysis
- ◆ Review 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.



COMPANY 

PRICE QUOTATION

CUSTOMER NAME _____

ADDRESS _____

ITEM	DESCRIPTION	UNIT PRICE	AMOUNT
(Watermark: Improsys)			
TOTAL AMOUNT			

SIGNATURES _____


For further information, please contact _____ Tel. _____

THANK YOU

Quotation Management : Create Quote -

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

Followup Due Date	13-Dec-2016 
Tax Category	Select
Priority	Select
	Quotation 2% CST
	Quotation 13.5% MVAT


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

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

Against	<input type="radio"/> No Ref	<input checked="" type="radio"/> Enquiry	<input type="radio"/> Previous Quotation
---------	------------------------------	--	--

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

Quotation Management : Sample Format -

<div style="display: flex; justify-content: space-between; align-items: center;">  <div> QUOTATION IMPROSYS TECHNOLOGIES Address: A-29, A wing, Jay Ganesh Vision, Near Inox Theatre, Akurdi, Pune-411035 Phone No: 020 - 46700036 Email ID: crm@improsys.in </div> </div>					
TO, Customer Name : ADVIK HITECH PVT LTD PANTNAGAR Address : AHPL PLANT-9, PLOT NO-7A, SECTOR 9, IIE, PANTNAGAR, 263153, Uttranchal, India City : UTTRANCHAL			Enquiry No. : EQ/00345/18-19 Date : 10-Jun-2018 Quotation No : QT/00101/18-19 Date : 23-Jun-2018		
Dear Sir, We are glad to submit our lowest quotation as desired by you for the following items. we hope that you may find our rates more reasonable and competitive.					
Sr. No.	Name of the Product	HSN/SAC	MOQ.	Rate(Rs)	Amount(Rs)
1	PCD REAMER: Specification: D8xCHxFL30xOAL80xSH10, Z=2(A527) BODY	82076010	3.00 Nos	22500.00	67500.00
2	PCD REAMER: Specification: D9xCHxFL30xOAL80xSH10, Z=2(A527) BODY	82076010	3.00 Nos	24500.00	73500.00
3	PCD REAMER: Specification: D23.17xCHxFL30xOAL80xSH20, Z=4+2(A527) BODY	82076010	3.00 Nos	45700.00	137100.00
Total Quantity			9.00	Total Amount	278100.00
Amount In Word :- Rs Three Lakh Twenty Eight Thousand One Hundreds Fifty Eight Only					
Terms and Conditions : 1. DELIVERY TERMS :- 2-3 WEEKS 2. PAYMENT TERMS :- 30 DAYS 3. DISCOUNT :- 30%			IGST : 18% 50058.00 Tax Subtotal: 50058.00 Grand Total: 328158.00		
We thank you very much for your inquiry and trust this quotation subject to the terms given above finds your approval, your order will receive our prompt and careful attention					
GST TIN NO. : 27AA56M0141N1ZC PAN NO : AAJCM0451N			For Improsys Technologies Authorized Signatory		

(ERP 2010- 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 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.



Quotation Management -

Quotation Follow-up Dashboard

QUOTATION FOLLOW UP

Today's Pending	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
Last Week's Pending	Select	Select	Select	Select	Select	Select	Select		Select			
Last Month's Pending	SQT/16-17/0009/04	Amey Bhavsar	In Progress	Raviraj Deshpande	22/Jun/16	22/Jul/16	20/Jul/16	95	Technofab	<input type="checkbox"/>	Show	Update
Last Year's Pending	SQT/16-17/0008/25	Amey Bhavsar	In Progress	Akshay Dongare	07/Jun/16	16/Jul/16	07/Jun/16	101	Sunteck	<input type="checkbox"/>	Show	Update
In Progress	SEQT/16-17/0016/25	Amey Bhavsar	In Progress	Akshay Dongare	07/Jun/16	23/Jun/16	07/Jun/16	124	Canply	<input type="checkbox"/>	Show	Update
Draft	SEQT/16-17/0015/25	Amey Bhavsar	In Progress	Akshay Dongare	07/Jun/16	28/Jun/16	07/Jun/16	119	Nucleas	<input type="checkbox"/>	Show	Update
Cancelled	SEQT/16-17/0008/25	Amey Bhavsar	In Progress	Akshay Dongare	18/May/16	20/Jun/16	18/May/16	127	RJ Engineering Pvt. Ltd.	<input type="checkbox"/>	Show	Update
Closed	SEQT/16-17/0004/25	Amey Bhavsar	In Progress	Akshay Dongare	06/May/16	22/Jun/16	07/May/16	125	Sandvik Coromant India	<input type="checkbox"/>	Show	Update
Approved	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.	<input type="checkbox"/>	Show	Update
Rejected	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.	<input type="checkbox"/>	Show	Update
	SQT/16-17/0003/25	Amey Bhavsar	In Progress	Akshay Dongare	07/Apr/16	31/May/16	28/Apr/16	147	Sealmtech Trading	<input type="checkbox"/>	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	<input type="checkbox"/>	Show	Update
	SQT/15-16/0119/25	Amey Bhavsar	In Progress	Akshay Dongare	05/Mar/16	15/Jun/16	05/Mar/16	132	VEKARIA	<input type="checkbox"/>	Show	Update

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

Quotation follow-up history

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

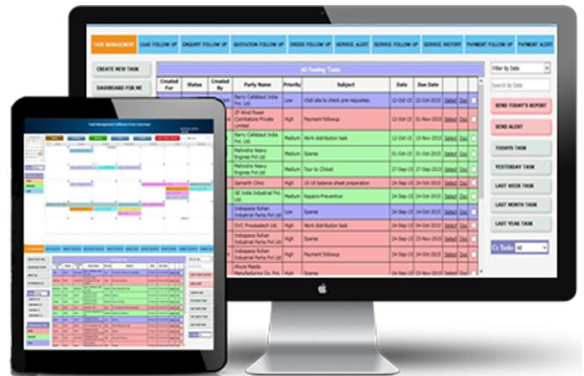
Sr.No	Update Type	Notes Type	Notes Description	Update Date	Time	Due Date	
1	Follow Up	Feedback From Customer	ali sirs cellis with ganesh sir he said ali is out of	05/May/2016	11:10 AM	26/May/2016	Delete
2	Follow Up	Feedback From Customer	called but client was busy	30/Apr/2016	10:53 AM	30/Apr/2016	Delete
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

Task Management -

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



**Task
Creation**



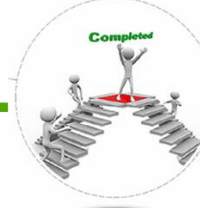
**Allocation
Of Task**



**Task
Follow Up**



**Task
Status Update**



**Task
Completion**



**Daily Report
On Email**

Everything else you need from a task manager.

◆ Progress at a glance

- ◆ **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.

Task Management - Features

- ◆ 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.

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.

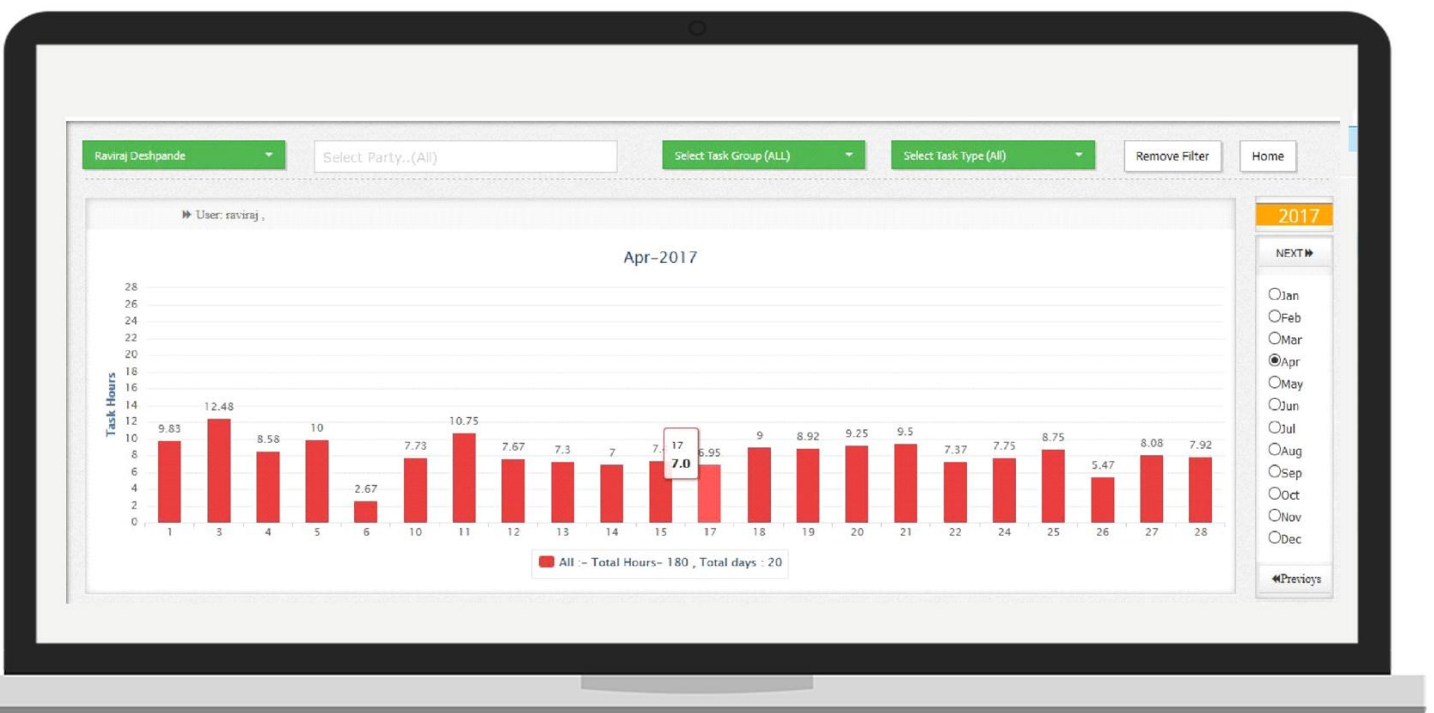


Task Management -

Daily Reports On Email : Monitoring daily completed and not completed work.

Daily Report of raviraj Dated on 23/Jun/18											
Sr.No.	Current Status	Party Name	Subject And Description	Creation Date	Due Date	Start Time	End Time	Hours	History Status	Updation Date	Remark
1	In-Progress	KSB Pumps Ltd - Shirwal	KSB Check by New Entry - -	23/Jun/2018	23/Jun/2018	09:40 AM	10:30 AM	00:50:00	In-Progress	6/23/2018 12:00:00 AM	KSB Check by ne entry 1. Utilization Report 2. Efficiency Report 3. MFSF 4. Addl. Time Summary
2	In-Progress	Technofab Industries	Technofab Check and Inform - -	23/Jun/2018	23/Jun/2018	10:55 AM	11:33 AM	00:38:00	In-Progress	6/23/2018 12:00:00 AM	Add item and check imported program
3	Completed	Improsys	Internal Task and Discussion - -	23/Jun/2018	23/Jun/2018	10:40 AM	10:55 AM	00:15:00	In-Progress	6/23/2018 12:00:00 AM	Visit plan preparation, call to trimoorty
4	Completed	Improsys	ERP Demo at Pune Polymers - -	23/Jun/2018	23/Jun/2018	01:40 PM	05:20 PM	03:40:00	Completed	6/23/2018 12:00:00 AM	
5	Completed	Improsys	Internal Task and Discussion - -	23/Jun/2018	23/Jun/2018	05:20 PM	06:36 PM	01:16:00	Completed	6/23/2018 12:00:00 AM	Internal discussion and plan for demo.
6	Completed	Improsys	Internal Task and Discussion - -	22/Jun/2018	22/Jun/2018	10:40 PM	10:40 PM	00:00:00	Completed	6/23/2018 12:00:00 AM	
								Total Hours	06:39:00		
All Pending Tasks											
Sr.No.	Status	Party Name	Subject And Description	Creation Date	Due Date	Created By					
1	Draft	Netsol Company W.L.L	MMB Kuwait Scrap Flow - -	02/Jun/2018	02/Jun/2018	raviraj					
2	In-Progress	Technofab Industries	Technofab Industries Discuss with ABhijeet - -	05/Jun/2018	05/Jun/2018	raviraj					

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



Target Management -

Assign Sales Targets. Track sales performance.



- 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.
- Use the target summary to identify your star performers and determine the strength of each sales team based on the targets they achieved.

DASHBOARD - TARGET MANAGEMENT

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

Select Year : 2016-17

Select Item Category	Select Filter	Select User	Quarterly Target
Fracks	Area Wise	Selected User : PAWAN	Spice Caps >> West Bengal >> PAWAN
Injection	City Wise	MUKUND	
Nutro Active	Zone Wise	ANUP	
Supercrop	Ahmedabad	ARCHANA	
Milklife	AP/Telangana	ASHISH	
Loser Receivers	Aurangabad	DILIP	
DC-DC converters	Bihar	GNANARAJ	
Spice Caps	Central Mumbai	PAWAN	
Mashroom Flip Top Cap	Gwalior	SAMPATH	
ERP	Haryana	SIDDHARTHA	
	Indore & Bhopal	UNMESH	
		PRIT	
		SANTOSH	
		DINESH	
		EIAZ	
		KEDAR	
		MAHESH	
		MEDHA	
		NEHA	

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

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.

Target Management -

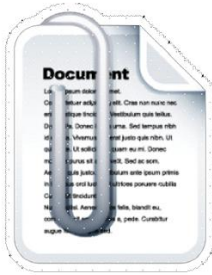
REPORTS - TARGET MANAGEMENT

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.

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.

Tax, Retail & GST Invoices :

Make new financial documents like GST invoices which are optimized to be compliant with Indian law.



Quick and detailed reports :

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



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.

PRO FORMA INVOICE

Test Testerson
Test Company, Inc.
P.O. Box 25423
Anaheim, CA 92825 USA

Issue Proforma Invoices :

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


GST Compliant :

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



Invoice Management -

GST INVOICE FORMAT

		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								<h1 style="margin: 0;">TAX INVOICE</h1>				
Name & address of consignee To, Mafatlal Industries Limited Vejalpur 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/Jun/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 :SPGGERCW003 (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 AC2035TXD1740-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														

Invoice Management -

PAYMENT FOLLOW-UP DASHBOARD

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

OVERDUE PAYMENT RECEIVABLES REPORT

Overdue Payment Receivables Report

Sr No	Doc Date	Document NO	Party Name	Doc Due Date	No. Of Days Pending	Total Amount	Paid/Received Amount	Balance Amount
1	14/Apr/2017	SEIN/17-18/0001/37	Pee Vee Textiles Limited	14/Apr/2017	11	1532698.00	0.00	1532698.00
2	14/Apr/2017	SIN/17-18/0004/00	Loknayak Jayprakash Narayan Shetkari Sahakari Soot Girni Limited	14/Apr/2017	11	245250.00	0.00	245250.00
3	14/Apr/2017	SIN/17-18/0005/00	Loknayak Jayprakash Narayan Shetkari Sahakari Soot Girni Limited	14/Apr/2017	11	232983.00	0.00	232983.00
4	15/Feb/2017	KUEIPL/JW/0002/16-17/39	Asarwa Mills	15/Feb/2017	69	30600.00	0.00	30600.00
5	16/Mar/2017	SIN/16-17/0003/37	Suryalakshmi Cotton Mills Limited	16/Mar/2017	40	114.00	108.00	6.00
6	20/Mar/2017	SIN/16-17/0004/37	Asarwa Mills	20/Mar/2017	36	1252.00	0.00	1252.00
7	22/Mar/2017	SIN/16-17/0006/37	Agrawal Indotex	22/Mar/2017	34	12485.00	0.00	12485.00
8	22/Mar/2017	SIN/16-17/0007/00	Suryalakshmi Cotton Mills Limited	22/Mar/2017	34	588750.00	0.00	588750.00
9	24/Feb/2017	SEIN/16-17/0001/00	Anant Spinning Mills	24/Feb/2017	60	1135.00	0.00	1135.00
Sub Total						2645267.00	108.00	2645159.00

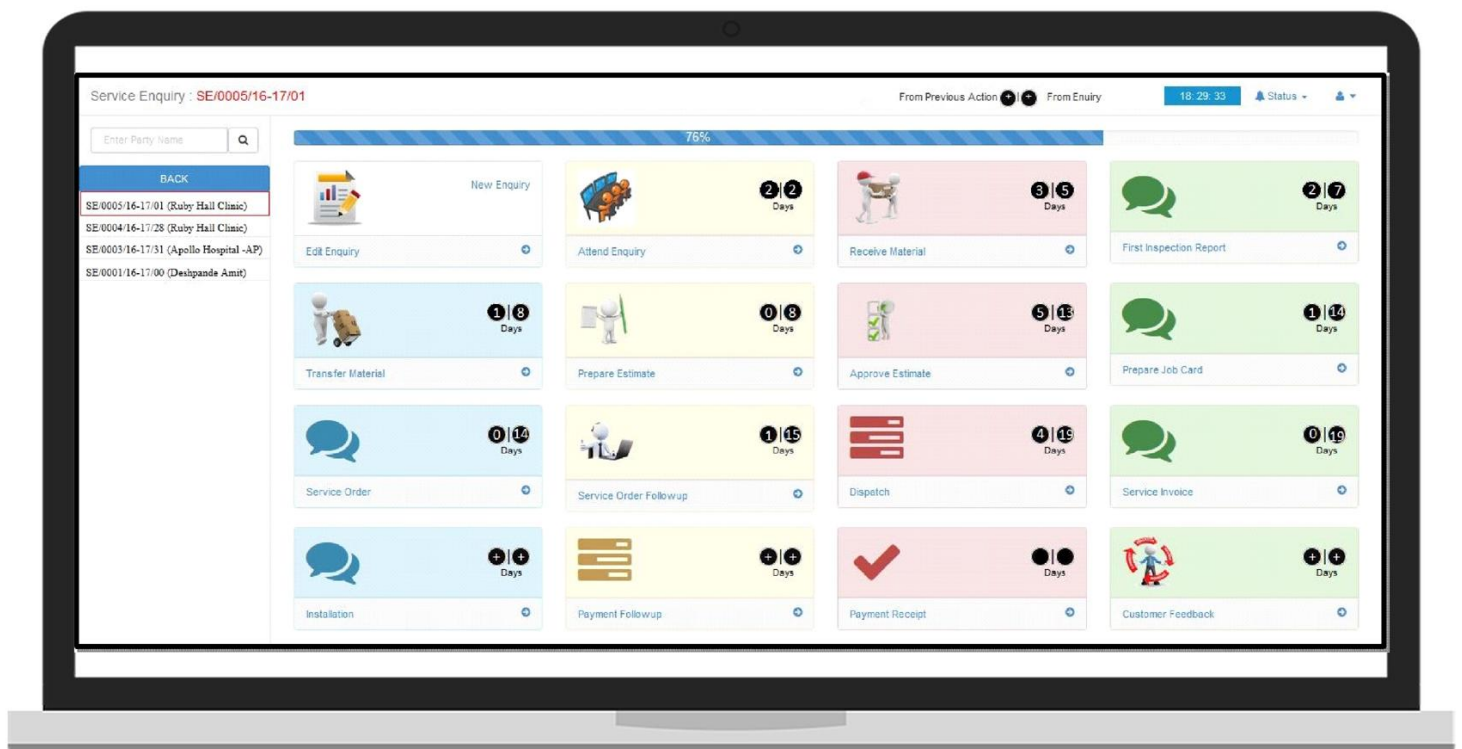
 (ERP 2009- www.improsys.in)

After Sales Service -

Spotlight 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.

Dashboard After Sales Service

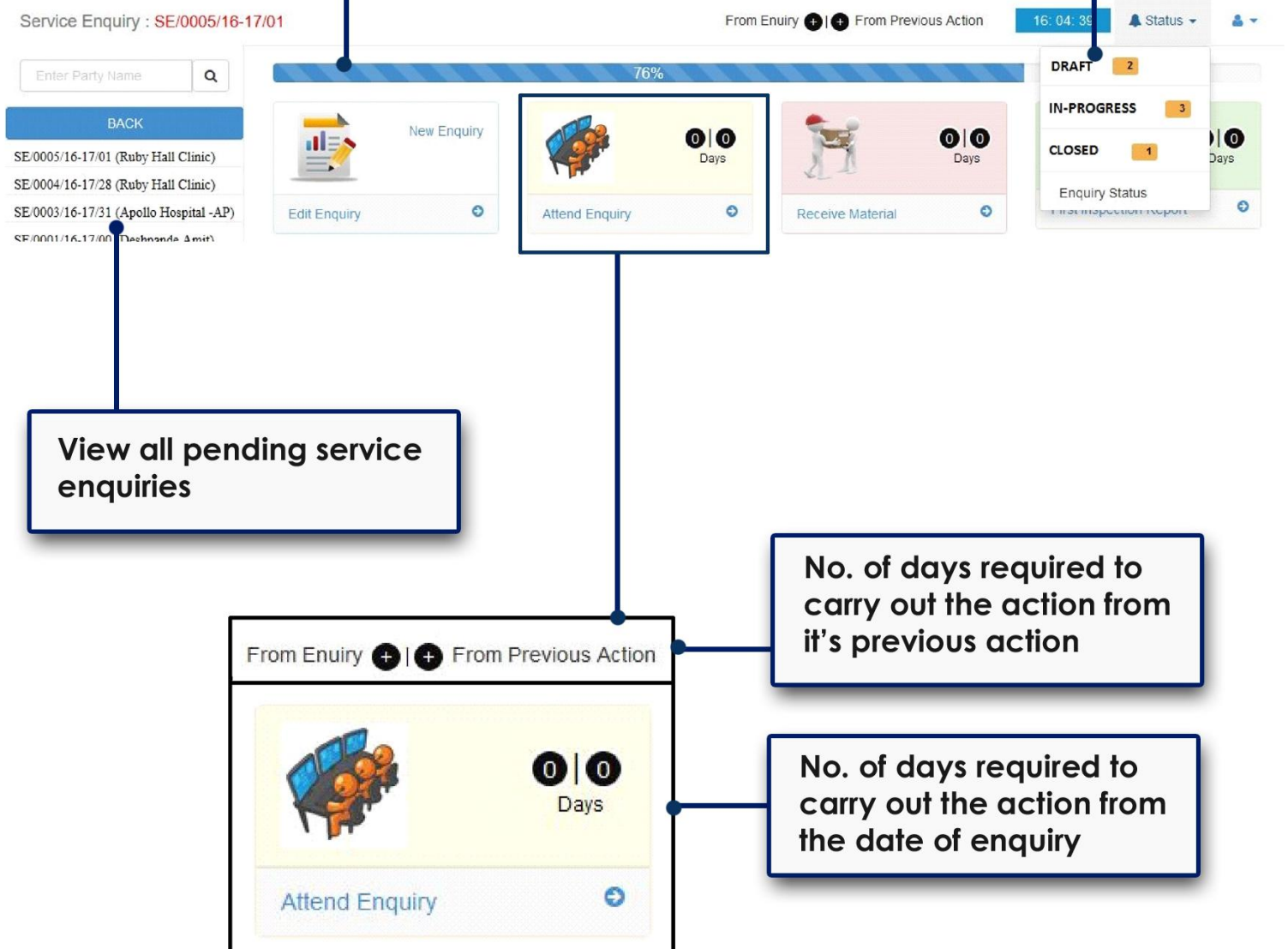


Service Dashboard brings the **decision making dashboard**. Your service manager or in-charge can make quick decision about a customer or a service ticket and direct his force well on time to take remedial action in the fastest way possible.

After Sales Service : Dashboard -

Track progress of a enquiry instantly with the progress bar

View status wise enquiries

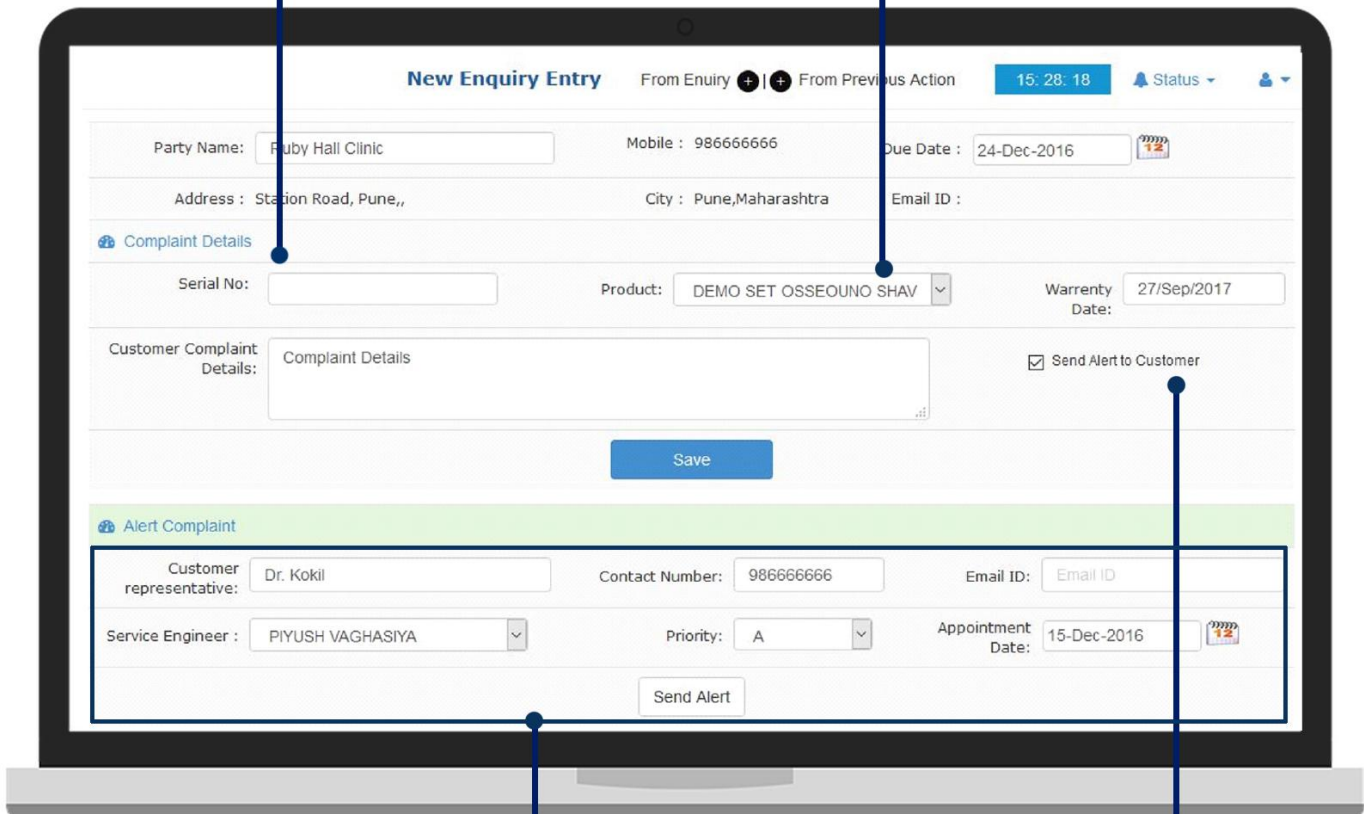


After Sales Service -

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



New Enquiry Entry From Enquiry + | + From Previous Action 15: 28: 18 Status ▾

Party Name: Ruby Hall Clinic Mobile : 9866666666 Due Date : 24-Dec-2016

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

Complaint Details

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

Customer Complaint Details: Complaint Details ☒ Send Alert to Customer

Alert Complaint

Customer representative: Dr. Kokil Contact Number: 9866666666 Email ID: Email ID

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

Send Alert

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

SMS / Email
Notification
to customer

After Sales Service : **Features** -

- ◆ 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.

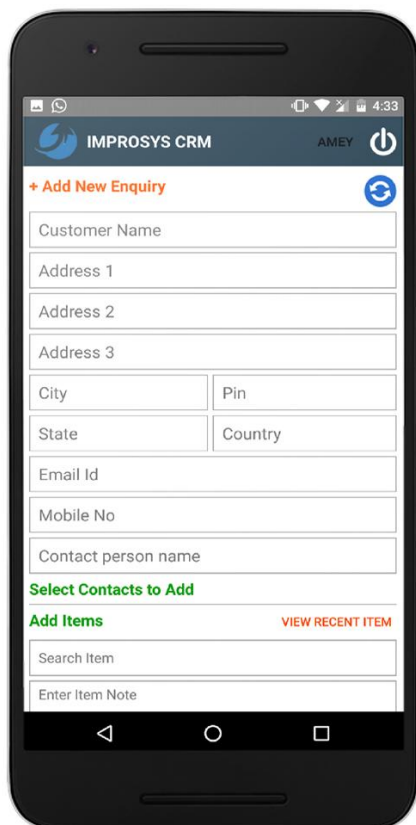
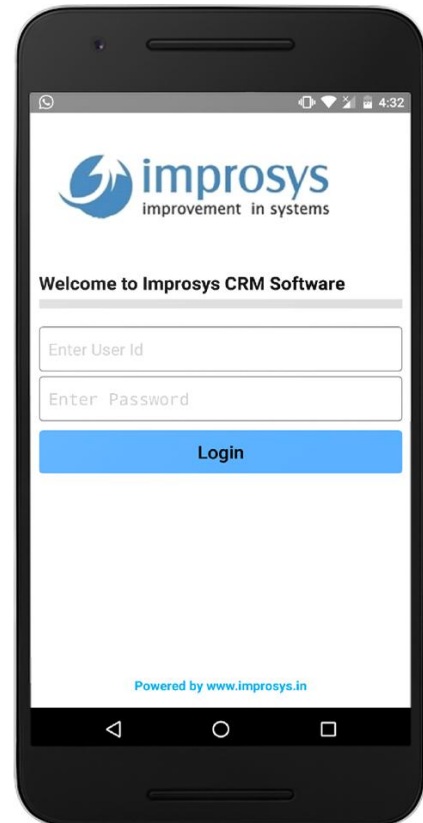


CRM On Mobile-

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.



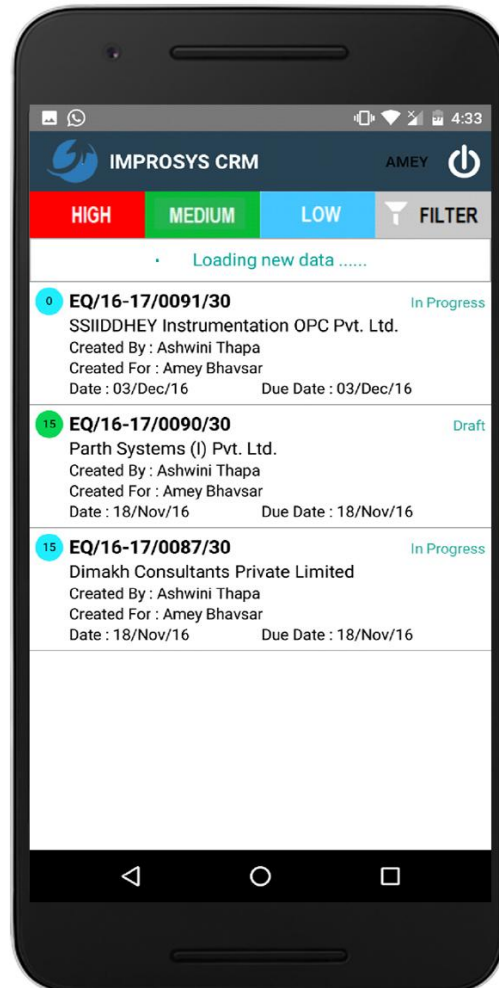
User Friendly Design

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.



CRM On Mobile-



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.



Improsys Support



- ◆ Requirement analysis by functional experts
- ◆ Site visit of expert for training to end users
- ◆ Demonstration of cases from similar industry
- ◆ Handholding for Import of master data
- ◆ Handholding for first 3 months of duration
- ◆ Email & telephone support for till 6 months



Improsys Support Tools



◆ Software Support

- Flow Charts
- Operational Manuals
- Videos
- FAQs
- Import Utilities

◆ Email Support

◆ Remote Support

- Team Viewer
- AnyDesk
- Skype

◆ Telephonic Support

- One to one interaction

◆ Technical Support

- Technical assistance

◆ Site Visit

- Site Visit



Software Requirements



- ◆ **No additional investment required for software**
- ◆ **Server Requirements**
 - Windows Operating System
 - Internet Information Server
 - Dot net framework
 - Mozilla Firefox
- ◆ **Client M/C Requirements**
 - Mozilla Firefox
- ◆ **Option to host the software on cloud**



Improsys Customer Testimonials

List of loyal customers with repeat business to Improsys



Shini Plastics Technologies India
Pvt.Ltd., Pune



Piotex Textech Pvt. Ltd., Pune



Amber Design Tech Pvt. Ltd.,
Mumbai



Prism IT Solutions Pvt.Ltd., Pune



Pridex Medicare Pvt. Ltd.,Pune



BioResource Biotech Pvt. Ltd., Pune



Shakti Mining Equipments, Nashik



PLA Components, Mumbai

Services from Improsys



Our major focus is to offer sustainable productivity improvements and cost reductions for our clients. Improsys offers consulting for productivity, quality, cash flow, value, delivery, improvement.

- ◆ **5S Training & Implementation**
- ◆ **KAIZEN Training & Implementation**
- ◆ **Lean Manufacturing Training & Implementation**
- ◆ **Six sigma Training & Implementation**
- ◆ **Work Study, Time Study**
- ◆ **Productivity Analysis**

Other softwares from Improsys



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