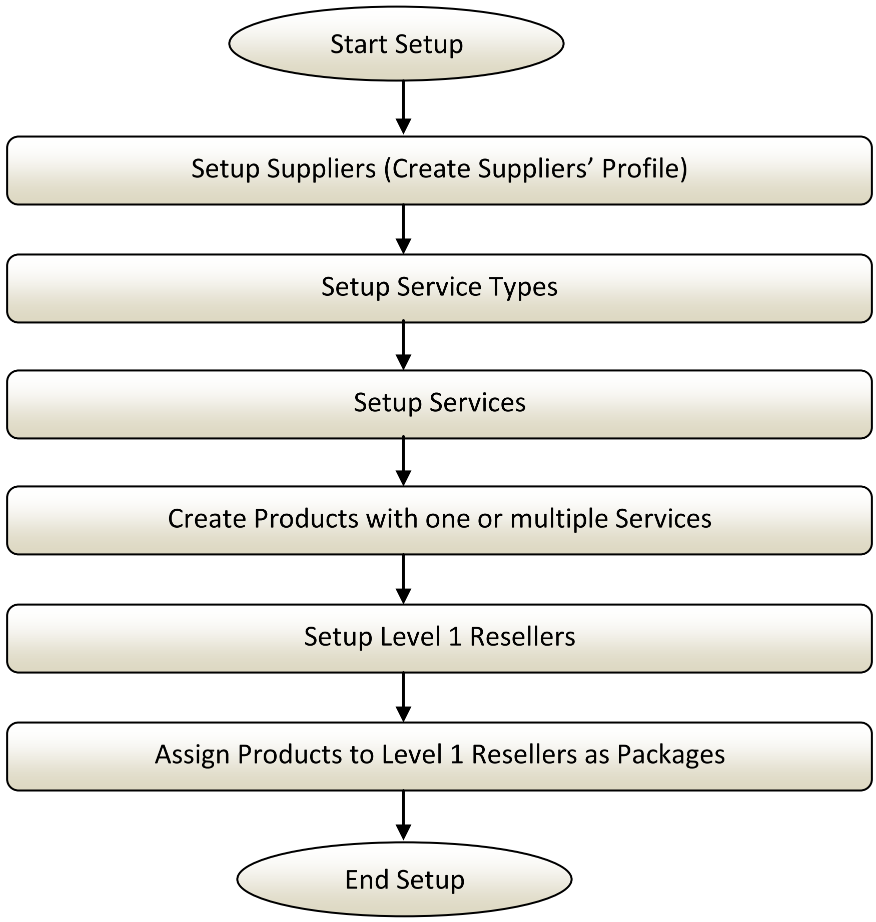
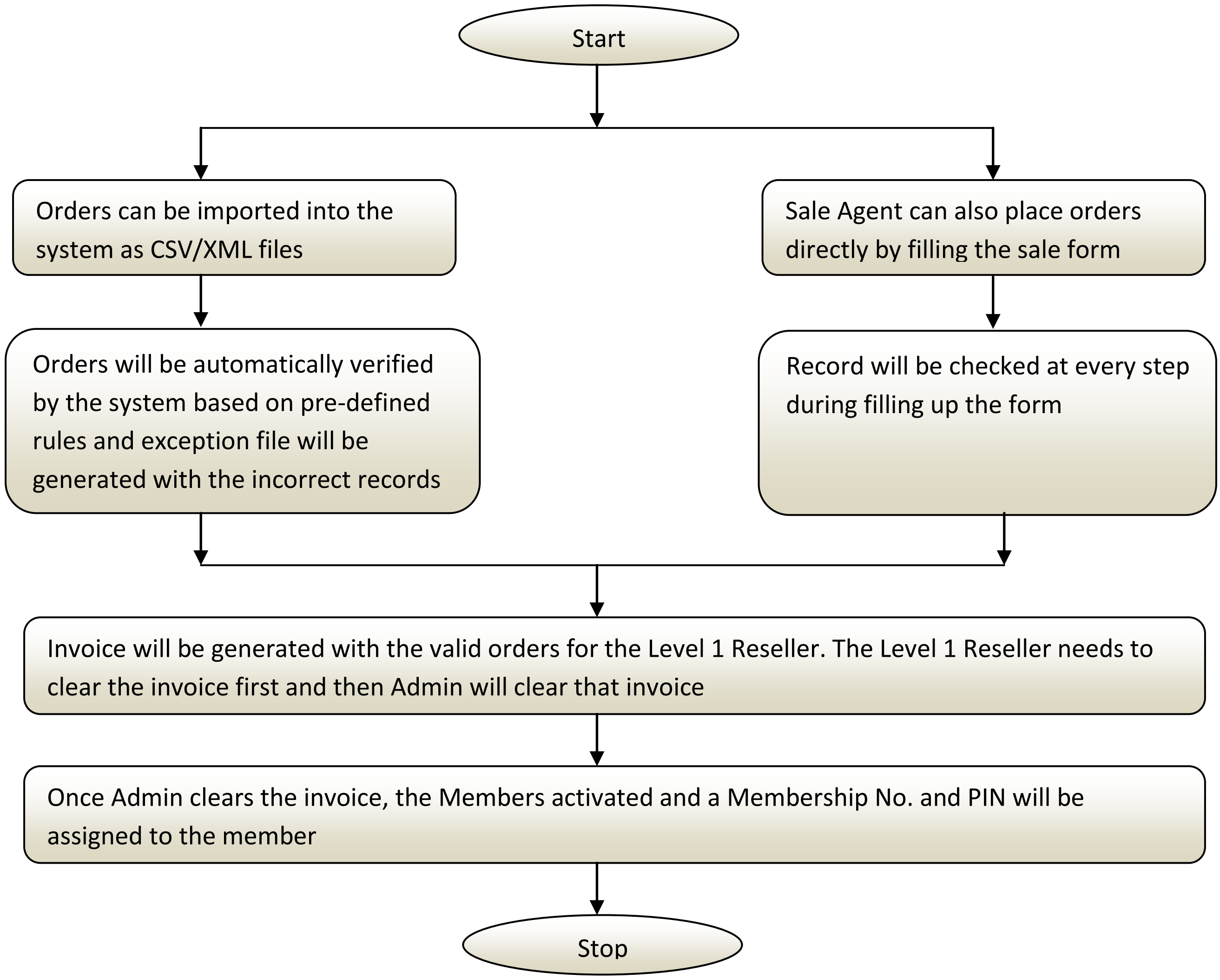
How the CRM works?

Administrative Panel

Initial Setup



Manage Orders



Administrative Panel

1) Setup Suppliers
2) Setup Service Types
3) Setup Services
4) Setup Products with one or multiple services
5) Setup L1 Resellers
6) Assign Products to L1 Resellers as Packages
7) Generate Membership Number and PIN combination for each product from the Inventory section
8) Orders can be imported in the system as XML or CSV files (fixed format supplied)
9) Each file can contain any number of orders
10) Each order will be verified automatically by the system and an exception file will be generated against each imported file containing the incomplete/invalid orders
11) After importing the orders into the system an invoice will be automatically generated by the system to the L1 Reseller
12) Once the L1 Reseller and the CRM Administrator clears the invoice (L1 Reseller clears the invoice first and then the CRM Administration can clear it), every member in the Order file will be assigned a unique Membership No. and PIN and the member gets activated
13) Provider specific files are generated everyday (at 11:59:59 pm), with the newly activated members or whatever the provider's requirements are in the format specified by the provider
14) CRM Administrator can also handle L1 Reseller Users, L2+ Resellers and their users
15) CRM Administrator can handle MSCC and PRCC Users of different levels.