

Automation CRM

User Manual

for

Administrator

Version 1.1

Dated 1st April 2011

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Norbell CRM has been developed as a complete business management solution. It is a powerful, easy-to-use web-based solution to manage your sales and billing processes, customer service, and marketing and reseller management.

It has got multiple modules e.g. Suppliers, Products & Services, Resellers, Accounts, Reports, Support etc. Norbell can create accounts for its Resellers on the system and then the Resellers can manage their own business from this CRM too. Resellers can create their own user accounts and assign desired permission(s) for accessing different modules.

CRM login Page

URL: www.onlinedemo.in/newcrm/

User: admin

Password: xxxxxx (password will be provided separately)

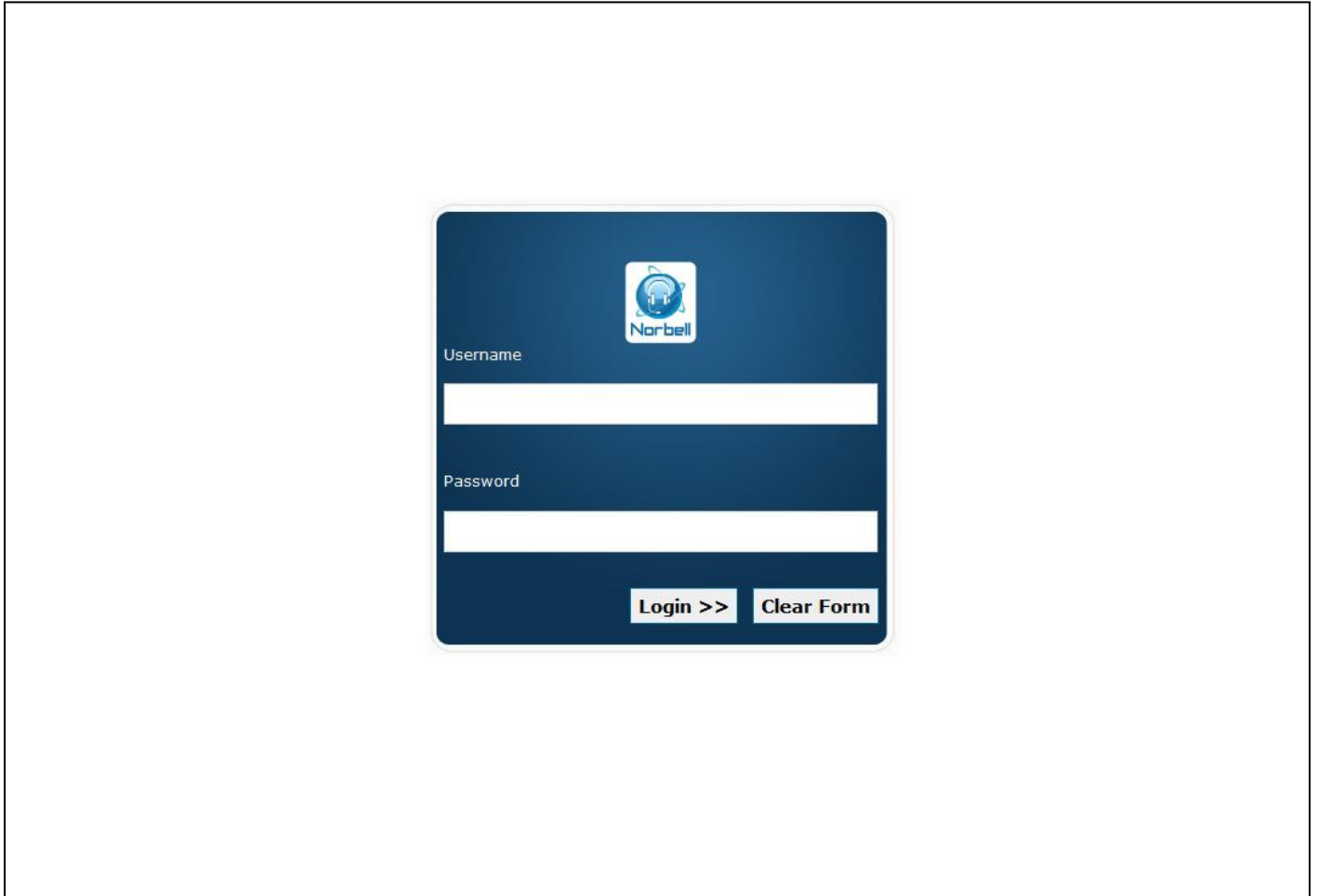


Figure 1 : Automation CRM Log in Page

CRM Dash Board

We have the access to all the modules from the dashboard.

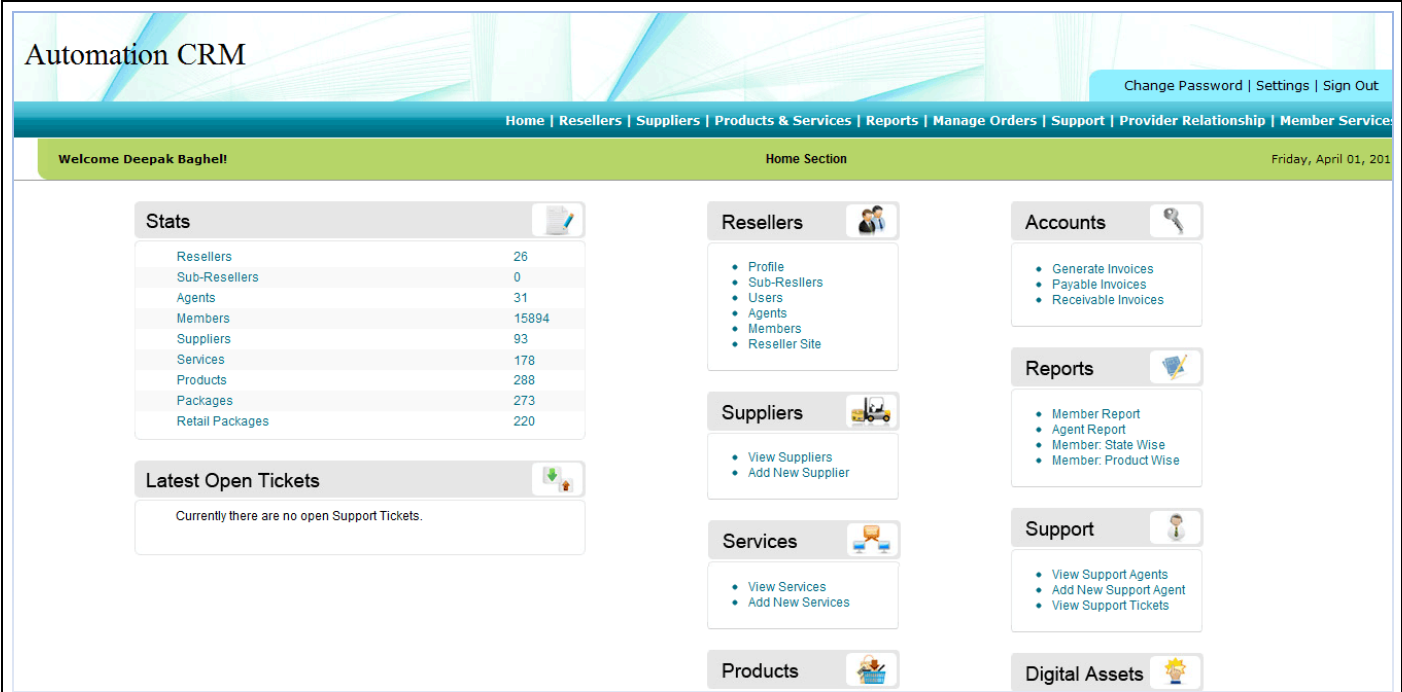


Figure 2: Automation CRM Dash Board

Admin Login

After login, the user lands on CRM Dashboard. On Dash board you can see statistics, latest open tickets and navigation links to manage different section of CRM. You can click on any counts to view details under statistics section.

Main Navigation

Reseller – This can be used to view the list of Resellers, manage their profile, their Sub Resellers, Users, Agents, Package, and Retail Package etc.

- **Resellers** – This is the list of Resellers. After selection of any one from this list you can use following options
 - **Profile** – By using this option you can view or update profile of selected Reseller
 - **Sub-Reseller** – List, Add, Modify and Remove sub-reseller. You can view or modify details information of any sub-reseller.
 - **Users** – List, Add, Modify and Remove users. You can view or modify details information of any sub-reseller. Any Type of user like Admin, Agent, Manager and Operator can be added from here.
 - **Agents** - List, Add, Modify and Remove Sales Agents. You can view or modify details information of any selected Sales Agent.
 - **Members** - List, Modify and Remove Member. You can view or modify details information of any selected Member. You can search member based on any field like membership no, first name, last name, email Id etc
 - **Packages** - List, Add, Modify and Remove Product Packages. You can view or modify details information of any selected Package.
 - **Retail Packages** - List, Add, Modify and Remove Product Retail Packages. You can view or modify details information of any selected Retail Package. Retail Package is used to sale others.

Reseller Profile

Norbell Administrator can modify his own profile and can also update any other reseller's profile by clicking on the reseller in the left-panel.

The screenshot displays the 'Automation CRM' interface. At the top, there is a navigation bar with links for 'Home | Resellers | Suppliers | Products & Services | Reports | Manage Orders | Support | Provider Relationship | Member Services'. Below this, a green banner shows 'Welcome Deepak Baghel!' and 'Resellers Section' with the date 'Friday, April 01, 2011'. The main content area is divided into a sidebar and a main panel. The sidebar lists 'Resellers' including 'Automation CRM' and 'Reseller-1' through 'Reseller-26'. The main panel shows the 'Company Profile' for 'Automation CRM' with the following fields:

| Profile | Sub-Resellers | Users | Agents | Members | Reseller Site |
|---------------------------|-------------------|-------|--------|---------|---------------|
| Company Profile | | | | | |
| Company* | Automation CRM | | | | |
| Contact Name | Deepak Baghel | | | | |
| Code | | | | | |
| Address1 | 1099 Marine Drive | | | | |
| Address2 | | | | | |
| City | New York | | | | |
| State/Province | New York | | | | |
| ZIP/Postal Code | 12345 | | | | |
| Phone Number | | | | | |
| Fax Number | | | | | |
| Email ID | | | | | |
| Contact Email | | | | | |
| Customer Service Address1 | | | | | |

Figure 3: Reseller Profile

Sub Reseller

The Sub-Resellers tab will display a list of Resellers under Norbell. When Norbell Administrator selects a Reseller from the left-panel, the Sub-Resellers tab will display a list of Sub-Resellers of the selected Reseller.

We can also Add/Modify any Reseller Profile from this tab.

The screenshot shows the Automation CRM interface. At the top, there is a navigation bar with links: Home | Resellers | Suppliers | Products & Services | Reports | Manage Orders | Support | Provider Relationship | Member Services. Below this is a green banner with the text "Welcome Deepak Baghel!" and "Resellers Section" on the right, along with the date "Friday, April 01, 2011".

The main content area displays a table with the following columns: Profile, Sub-Resellers, Users, Agents, Members, and Reseller Site. The table lists various Reseller profiles (Reseller-1 to Reseller-26) and their corresponding sub-resellers (Contact 1 to Contact 26). Each row includes a phone number (999-9999999) and an email address (a@a.com). The Reseller Type is listed as "Level 1 Reseller" for all entries. A "Modify" button is present in the Reseller Site column for each row.

On the left side, there is a sidebar menu titled "Resellers" with a tree view showing "Automation CRM" and a list of Reseller profiles from Reseller-1 to Reseller-26.

Figure 4: Add Sub Reseller

Users

This section will show a list of Users (Admin/Operators/Managers) and Customer Service Agents. We can assign custom permissions while creating an Operator or a Manager.

The screenshot displays the Automation CRM Admin interface. At the top, there is a navigation bar with links for Home, Resellers, Suppliers, Products & Services, Reports, Manage Orders, Support, Provider Relationship, and Member Services. Below this, a green banner shows the user's name (Deepak Baghel) and the current date (Friday, April 01, 2011). The main content area is titled "Resellers Section" and contains a table of users. The table has columns for ID, Name, City, Phone, Email, User Type, and Modify. The users listed include MedNet Finance Manager, Sales Agent, Mednet Provider Login, Ken, Angsuman Chatterjee, Edie Almasi, and Cindy.

| Profile | Sub-Resellers | Users | Agents | Members | Reseller Site | |
|--------------|------------------------|----------|-------------|---------|---------------|--------|
| Users | | | | | | |
| ID | Name | City | Phone | Email | User Type | Modify |
| 254 | MedNet Finance Manager | New York | 990-9909900 | | Admin | |
| 255 | Sales Agent | New York | 990-9909900 | | Admin | |
| 265 | Mednet Provider Login | New York | 990-9909900 | | Admin | |
| 281 | | New York | 990-9909900 | | PRCC | |
| 282 | | New York | 990-9909900 | | PRCC | |
| 283 | | New York | 990-9909900 | | PRCC | |
| 284 | | New York | 990-9909900 | | MSCC | |
| 285 | | New York | 990-9909900 | | MSCC | |
| 286 | | New York | 990-9909900 | | MSCC | |
| 287 | Ken | New York | 990-9909900 | | Admin | |
| 5773 | | New York | 990-9909900 | | MSCC | |
| 5774 | | New York | 990-9909900 | | MSCC | |
| 5775 | Cindy | New York | 990-9909900 | | | |
| 5776 | | New York | 990-9909900 | | MSCC | |
| 5777 | Angsuman Chatterjee | New York | 990-9909900 | | Admin | |
| 5778 | Edie Almasi | New York | 990-9909900 | | Admin | |
| 5779 | | New York | 990-9909900 | | MSCC | |
| 5787 | Cindy | New York | 990-9909900 | | Admin | |

Figure 5: User List

Agents

When we create a Sale Agent from the Users tab, the list of the Sale Agents will be displayed under Agents tab. We can assign Retail Packages to Agents and can modify their profile from here.

The screenshot displays the Automation CRM interface. At the top, there is a navigation bar with the title 'Automation CRM' and links for 'Change Password | Settings | Sign Out'. Below this is a secondary navigation bar with links: 'Home | Resellers | Suppliers | Products & Services | Reports | Manage Orders | Support | Provider Relationship | Member Services'. A green banner below the navigation bar says 'Welcome Deepak Baghel!' and 'Resellers Section' on the right, with the date 'Friday, April 01, 2011'.

The main content area is divided into a sidebar and a main table. The sidebar on the left is titled 'Resellers' and contains a list of items: 'Automation CRM', 'Reseller-1', 'Reseller-10', 'Reseller-11', 'Reseller-12', 'Reseller-13', 'Reseller-14', 'Reseller-15', 'Reseller-16', 'Reseller-17', 'Reseller-18', 'Reseller-19', 'Reseller-2', 'Reseller-20', 'Reseller-21', 'Reseller-22', 'Reseller-23', 'Reseller-24', 'Reseller-25', 'Reseller-26', 'Reseller-3', 'Reseller-4', 'Reseller-5', 'Reseller-6', 'Reseller-7', 'Reseller-8', and 'Reseller-9'. The main table is titled 'Agents' and has columns: 'Profile', 'Sub-Resellers', 'Users', 'Agents', 'Members', and 'Reseller Site'. The 'Agents' column is active and contains a table with the following data:

| ID | Name | City | Phone | Email | Products | Modify |
|------|-------------|---------------|-------------|-------|----------|--------|
| 5798 | Sales Agent | San Francisco | 203-9785555 | | | |

Figure 6: Agent List

Members

Selecting this tab will display a list of Members of the selected Reseller. We can directly send emails to this member and check his/her status history from here

Automation CRM
Change Password | Settings | Sign Out

[Home](#) | [Resellers](#) | [Suppliers](#) | [Products & Services](#) | [Reports](#) | [Manage Orders](#) | [Support](#) | [Provider Relationship](#) | [Member Services](#)

Welcome Deepak Baghel!
Resellers Section
Friday, April 01, 2011

- Resellers
- Automation CRM
- Reseller-1

| Profile | | Sub-Resellers | Users | Agents | Members | Packages | Retail Packages | |
|---------|-----------------|----------------|----------|--------------------|----------------|-------------|-----------------|--------|
| ID | Activation Date | Membership No. | Product | Name | City | Phone | Email | Status |
| 22425 | 2007-04-10 | 002873666 | AMA-1659 | DAVID TAYLOR | BRONX | 111-1111111 | | |
| 22512 | 2008-01-18 | 037341104 | AMA-1804 | ARTHUR SHAW | JAMICA | 718-6599056 | | |
| 22527 | 2007-04-10 | 046657314 | AMA-1655 | DAWN LANDGREEN | MONTGOMERY | 215-3683997 | | |
| 22601 | 2007-10-16 | 084362481 | AMA-3118 | COURTNEY CLAERY | MOULTONBOROUGH | 603-9866470 | | |
| 22662 | 2007-03-13 | 116715838 | AMA-1803 | SARA S. HAYES | PLYMOUTH | 763-4044067 | | |
| 22714 | 2007-03-13 | 141387004 | AMA-1808 | KATHY DOUDNEY | ANNA | 972-9243303 | | |
| 22800 | 2007-07-24 | 175731437 | AMA-1655 | SARA FENIMORE | Concord | 617-6283984 | | |
| 22826 | 2007-07-16 | 185788107 | AMA-1802 | MICHAEL TOTH | DIGMANS FERRY | 570-8287141 | | |
| 22874 | 2008-01-18 | 218130775 | AMA-1804 | MANUEL DELFIN | BRONX | 347-2759019 | | |
| 22911 | 2008-01-31 | 227883800 | AMA-1804 | JOHN BROCKA | NEW HARTFORD | 319-2390515 | | |
| 22914 | 2007-04-13 | 231712788 | AMA-1655 | PHIL PENMAN | NEW YORK | 917-4961644 | | |
| 22955 | 2007-07-24 | 247454210 | AMA-3108 | EDWIN MASSA | CAMDEN | 856-3380824 | | |
| 22970 | 2008-03-18 | 255662572 | AMA-1804 | ANONIA IRWIN | GOODLETTSVILLE | 615-8513019 | | |
| 22975 | 2008-02-13 | 258544248 | AMA-1804 | KATIE DEEVER | LAS VEGAS | 702-8569580 | | |
| 23063 | 2008-04-16 | 311160204 | AMA-1804 | VIVIAN MCCALL | TWIN PEAKS | 909-3366142 | | |
| 23074 | 2008-01-02 | 314543406 | AMA-1655 | JENIFER JACKSON | SAN FRANCISCO | 415-6733301 | | |
| 23092 | 2009-06-01 | 321274654 | AMA-3204 | LORI MORRIS-HUGHES | CHESAPEAKE | 757-2044422 | | |
| 23205 | 2007-07-16 | 362233374 | AMA-1656 | WILFRED FIGUEROA | PHILADELPHIA | 215-2918449 | | |

Figure 7: Member List

Packages

Norbell assigns products to their Resellers in the form of Packages. While creating a Package for a Reseller, Norbell set the Wholesale Prices, Renewal Prices, and Accessory Prices etc. Norbell can also exclude the Renewal cost from the Initial Order while creating the Package.

Automation CRM

Home | Resellers | Suppliers | Products & Services | Reports | Manage Orders | Support | Provider Relationship | Member Services

Welcome Deepak Baghell Resellers Section Friday, April 01, 2011

Resellers
 • Automation CRM
 • Reseller-10

| Profile | Sub-Resellers | Users | Agents | Members | Packages | Retail Packages |
|----------|---|-------|--------|---------|-------------------|-----------------|
| SKU | Product | | | | Registration Cost | Renewal Cost |
| PRE-2801 | APS 4 Tier RX - Family | | | | \$0.00 | \$4.00 |
| PRE-6443 | USA HealthCare Savings - Gold 3 - FLORIDA | | | | \$0.00 | \$10.50 |
| PRE-6445 | USA HealthCare Savings Executive 2 - Single | | | | \$0.00 | \$88.00 |
| PRE-6447 | USA HealthCare Savings - Gold 2 | | | | \$0.00 | \$8.00 |
| PRE-6449 | USA HealthCare Savings - Gold 3 | | | | \$0.00 | \$10.50 |
| PRE-6550 | USA HealthCare Savings Gold 1 | | | | \$4.00 | \$3.75 |
| PRE-6552 | USA HealthCare Savings Gold 2 | | | | \$7.00 | \$8.00 |
| PRE-6554 | USA HealthCare Savings Gold 3 | | | | \$10.00 | \$10.50 |
| PRE-6555 | USA HealthCare Savings Gold 3 - California | | | | \$0.00 | \$10.50 |

Add Package

Figure 8: Select Product (Step - 1)

Automation CRM

Home | Resellers | Suppliers | Products & Services | Reports | Manage Orders | Support | Provider Relationship | Member Services

Welcome Deepak Baghell Resellers Section Friday, April 01, 2011

Resellers
 • Automation CRM
 • Reseller-10

Add New Package (Step - 2)

PACKAGE INFORMATION

SKU : PRE-0997 Product : SunCoast ID Safe

Membership Site : http://www.medplusbenefits.com

Monthly Total : \$0.00 First Month Total : \$0.00

Renewal Frequency : Same as Membership Coverage Type : Not Applicable

Exclude Renewal Amount from Order Payment Shipping Type : Type-1

SERVICE SUMMARY

| Service Type | Provider | Cost | Frequency |
|----------------------------------|--------------------------------|--------|-----------|
| Identity Theft Restoration | Legal Club of America | \$0.00 | Monthly |
| Family Legal Plan | Legal Club - Legal Care Direct | \$0.00 | Monthly |
| Tax Preparation & Advice Program | Legal Club of America | \$0.00 | Monthly |

REFERRAL COMMISSION

| Effective Date | Reg (Monthly) | Renewal (Monthly) | Reg (Yearly) | Renewal (Monthly) |
|----------------|---------------|-------------------|--------------|-------------------|
| | | | | |

WHOLESALE PRICES

| Effective Date | Reg (Monthly) | Renewal (Monthly) | Reg (Dual) | Monthly Renewal (Dual) | Yearly Renewal (Dual) | Shipping | Kit Cost |
|----------------|---------------|-------------------|------------|------------------------|-----------------------|----------|----------|
| | | | | | | | |

Figure 9: Add New Package (Step - 2)

Retail Packages

Retail Packages can be created with the Packages which are allocated to the Reseller. Norbell can create this on behalf of a L1 Reseller. While creating Retail Packages we can set Actual Retail Price and Sale Agent Commission.

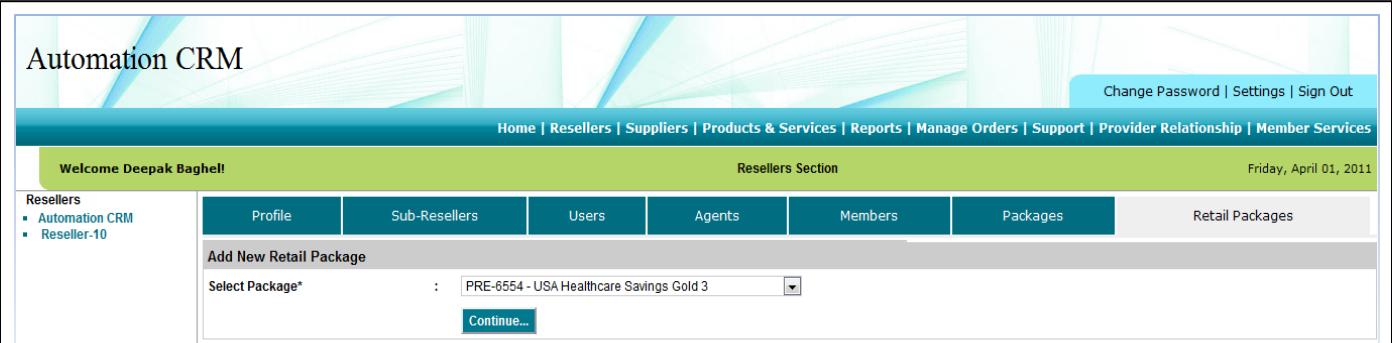


Figure 10: Select Package (Step - 1)

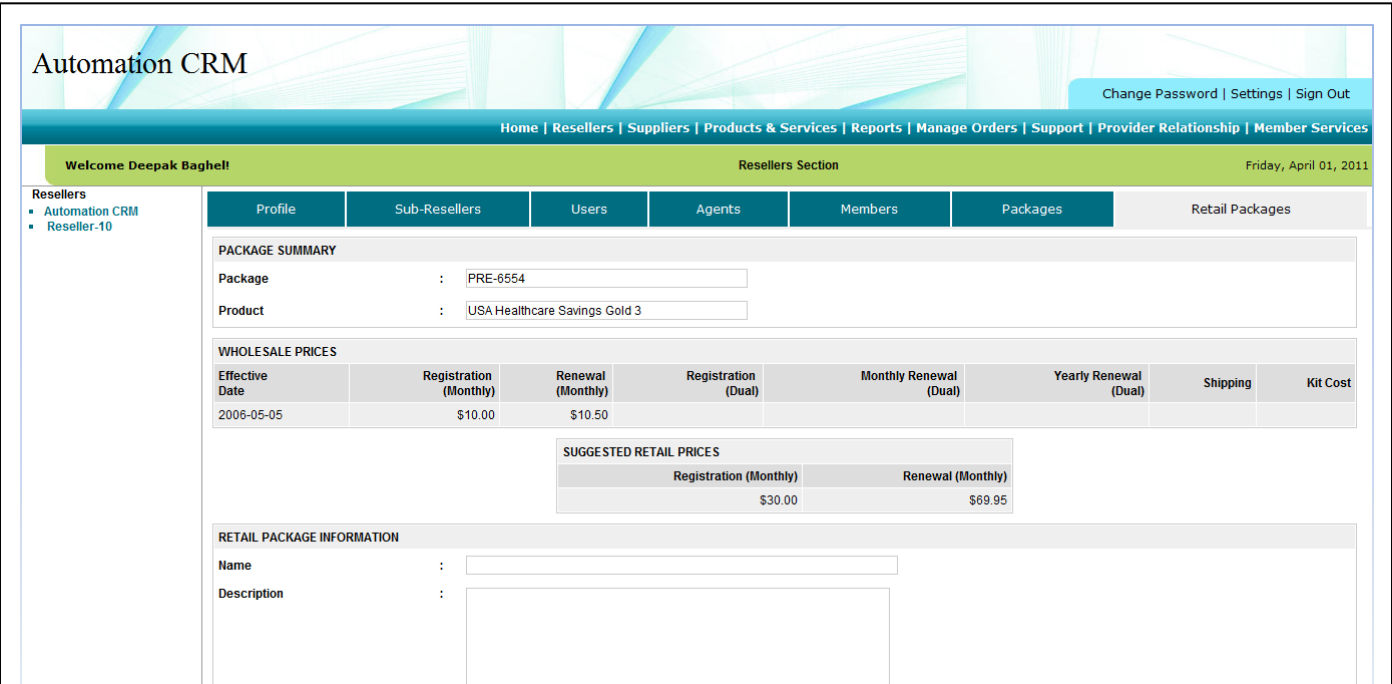


Figure 11: Add New Retail Package (Step - 2)

Suppliers – You can view list of Suppliers with details information and also can Add, Edit and Delete Supplier

- **View Suppliers** – You can view the list of available suppliers.
- **Add New Suppliers** – You can add new suppliers.
- **Edit Supplier** – You can view or modify detail information of any selected supplier.
- **Remove Supplier** – You can delete any of suppliers.

Automation CRM

Change Password | Settings | Sign Out

Home | Resellers | Suppliers | Products & Services | Reports | Manage Orders | Support | Provider Relationship | Member Services

Welcome Deepak Baghel Supplier Section Friday, April 01, 2011

| Name | City | State | Contact Name | Corporate Phone | Modify |
|--------------------------------------|---------------------|------------------|------------------|-----------------|--------|
| Access Development | Salt Lake City | Utah | Dave Cook | 888-2058050 | |
| ACE American Insurance Company | Wilmington | Delaware | | 800-3360627 | |
| AD&D - Accident Medical | | Ontario | | 111-1111111 | |
| Agility, Inc | Melville | New York | Philip Escaldi | 631-4248000 | |
| AHIR Association | a | Idaho | John Grubbs | 123-4567890 | |
| American Advantage Association | Winston Salem | North Carolina | Matt Lievens | 336-6599524 | |
| American Sentinel Insurance Company | Harrisburg | Pennsylvania | Matt Lievens | 336-6599524 | |
| APS | Wahoo | New Hampshire | Eric Hart | 402-4433556 | |
| Beltone | anytown | New York | | 555-1112222 | |
| CallMD | . | New York | | 111-1111111 | |
| Canada Online Healthlink, Inc. | Vancouver | British Columbia | Dipesh Parekh | 604-8723144 | |
| Caremark | Scottsdale | Arizona | Rena Schoolcraft | 888-7275594 | |
| Chesapeake Life Insurance Company | North Richland Hill | Texas | | - | |
| Cigna Dental | A | Florida | | 123-4567890 | |
| Companion | a | Alabama | Matt Lievens | 111-1111111 | |
| Computer Systems | a | Florida | | 123-4567890 | |
| Computer Systems - Ateam | | Florida | a | 123-456789 | |
| Computer Systems - Exclusive Shopper | | Florida | a | 123-456789 | |
| Computer Systems - Generic | a | Florida | a | 123-456789 | |
| Computer Systems - PowerHouse | a | Florida | | 123-456789 | |
| Computer Systems - PowerHouse | a | Florida | | 123-456789 | |

Figure 12: Suppliers List

Product & Services - You can view list of Product & Services with details information and also can Add, Edit and Product & Service. These Product & Services are used for creating products.

Services

- **Service Types** – You can Add/Edit/View the list of available service Types.

The screenshot shows the 'Automation CRM' interface. At the top, there is a header with the title 'Automation CRM' and navigation links: 'Home | Resellers | Suppliers | Products & Services | Reports | Manage Orders | Support | Provider Relationship | Member Services'. Below the header, there is a green bar with the text 'Welcome Deepak Baghel!' and 'Products Section (Total Products - 288)'. The date 'Friday, April 01, 2011' is displayed in the top right corner. The main content area is a table with the following columns: 'ID', 'Service Type', 'Enabled', and 'Modify'. The table lists 20 service types, all of which are enabled. The 'Modify' column contains a pencil icon for each row. On the left side, there is a sidebar with two sections: 'Services' and 'Products'. The 'Services' section includes links for 'Manage Service Types', 'View Services', 'Add New Services', and 'Search Services'. The 'Products' section includes links for 'View Products', 'Add Product', 'Search Products', and 'Inventory'.

| ID | Service Type | Enabled | Modify |
|----|--|---------|--------|
| 1 | 24 - hour Nurse | Yes | |
| 2 | 401 K Retirement Plan | Yes | |
| 3 | Accident Disability | Yes | |
| 4 | Accident Medical / Dental Expense | Yes | |
| 5 | Accidental Death & Dismemberment (AD&D) | Yes | |
| 6 | Alternative Medicine | Yes | |
| 7 | Ancillary Services | Yes | |
| 8 | Association Membership | Yes | |
| 9 | Auto Services | Yes | |
| 10 | Car Rental | Yes | |
| 11 | Childcare, Eldercare, Schools, Veterinarians | Yes | |
| 12 | Chiropractic | Yes | |
| 13 | Counseling Services | Yes | |
| 14 | Cruises | Yes | |
| 15 | Dental | Yes | |
| 16 | Diabetic Supplies | Yes | |
| 17 | Dining, Entertainment & Travel Guide | Yes | |
| 18 | Durable Medical Equipment & Supplies | Yes | |
| 19 | Emergency Communications | Yes | |
| 20 | Eye Exam Rebate | Yes | |

Figure 13: Service Type

- **View Services** – You can view the list of available services.
- **Add New Services** – You can add new services. Any service includes service type, provider name, renewal frequency, effective date, amount etc.
- **Edit Services** – You can view or modify detail information of any selected service.
- **Search Service**- You can search any service.

Automation CRM

Change Password | Settings | Sign Out

Home | Resellers | Suppliers | Products & Services | Reports | Manage Orders | Support | Provider Relationship | Member Services

Welcome Deepak Baghel! Products Section (Total Products - 288) Friday, April 01, 2011

Services

- Manage Service Types
- View Services
- Add New Services
- Search Services

Products

- View Products
- Add Product
- Search Products
- Inventory

Add New Service

Service Type* : Select Service Type

Provider* : Select Provider

Name (EN)* :

Name (ES) :

Renewal Frequency* : Monthly

Effective Date :

Amount* :

Disable Membership Suspension

Sales Reference Required

Enabled

Add Service Reset

Figure 14: Add Service

Products

- **Add New Products** – You can add new product. Any product can includes single or multiple services and the sum of cost of services is the cost of created product.
- **Edit Products** – You can view or modify detail information of any selected product.
- **Search Product-** You can search any product.

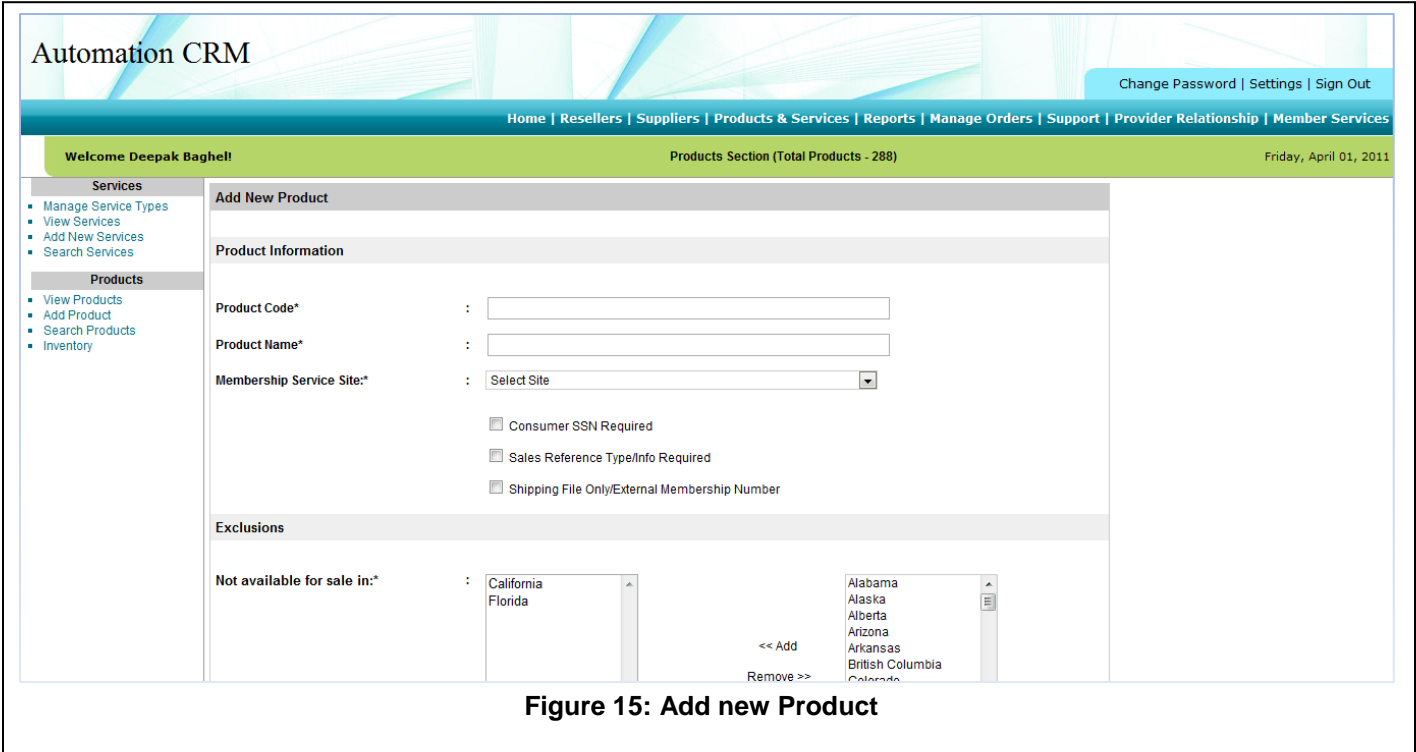


Figure 15: Add new Product

Inventory

The Inventory section has a list of reserved Membership Numbers and PIN combinations for different products. Once a new member subscribes for a product, the CRM assigns a unique Membership Number and PIN combination to the member depending upon the subscribed product. Every Membership Number and PIN combination is associated with a specific product, and that combination cannot be used for any other product.

For example, let we have a combination of Membership Number and PIN (989898989, 1234) associated with the product ABCD. So, this Membership Number and PIN can only be assigned to a member who subscribed for the product ABCD.

| Product Code | Product Name | Quantity |
|--------------|---|----------|
| 0985 | Ateam - Shopping | 1000 |
| 0986 | ATEAM - Shopping with Kit | 500 |
| 0990 | SunCoast Savings Club | 1000 |
| 0992 | SunCoast Savings Club w/Cert | 500 |
| 0997 | SunCoast ID Safe | 1000 |
| 0998 | SunCoast ID Safe - Financial Wellness Program | 500 |
| 0999 | SunCoast ID Safe - First Financial Wellness Program | 500 |
| 1201 | Sentinel ID Protect | 9000 |
| 1202 | Consumer Discount Network | 11000 |
| 1203 | Advantage Auto | 6000 |
| 1205 | Sentinel ID/Consumer Discount Network | 5000 |
| 1206 | Consumer Discount Network/Advantage Auto | 11500 |
| 1207 | Advantage Auto/Sentinel ID | 3000 |
| 1209 | Voyage Travel Advantage Auto - Double insert | 5000 |
| 1213 | CDNAuto - Double insert | 12000 |
| 1227 | Ally Core Benefit Package - Family | 100 |
| 1228 | Ally Security Package | 100 |
| 1250 | NW MedNet Dental Plan A - Member | 1000 |
| 1251 | NW MedNet Dental Plan A - Spouse | 1000 |
| 1252 | NW MedNet Dental Plan A - Child | 1000 |
| 1253 | NW MedNet Dental Plan A - Children | 1000 |

Figure – 16A: Inventory Section

To generate new batch of Membership Number, PIN combination, click on the required Product Code from the list and you will see the following page where you can generate a batch of Membership Number and PIN combination for that very product.

| Generate Numbers | | |
|---|----------|-------------------------|
| Product | : | 0985 - Ateam - Shopping |
| Available | : | 1000 |
| Quantity | : | 25 |
| <input type="button" value="Generate Numbers"/> | | |
| Inventory History | | |
| Date | Quantity | Available |
| 2003-01-01 | 1000 | 1000 |

Figure – 16B: Generate Inventory

Reports

- **Supplier new Activation** - You can generate and download the report in MS-Excel format
- **Supplier new Cancellation** - You can generate and download the report in MS-Excel format
- **Supplier current Archive Reports** - You can generate and download the report in MS-Excel format

The screenshot displays the Automation CRM interface. At the top, the header includes the text "Automation CRM" and navigation links: "Change Password | Settings | Sign Out". Below this is a secondary navigation bar with links: "Home | Resellers | Suppliers | Products & Services | Reports | Manage Orders | Support | Provider Relationship | Member Services". A green banner below the navigation bar contains the text "Welcome Deepak Baghel" on the left, "Reports Section" in the center, and "Friday, April 01, 2011" on the right.

The main content area is titled "Member Information Summary Report" and includes a "Report Archive" link. The report configuration section contains the following fields:

- Start Date:** 2011-03-25
- End Date:** 2011-04-01
- Select Reseller:** All
- Member Status:** All

A "Generate Report" button is located below the configuration fields. On the left side of the interface, there is a sidebar menu with the following categories and items:

- People Reports**
 - Member Info Summary
 - Member Information Details
 - Member Positive Report
 - Sales Agents -Reseller wise
 - Reseller Info Summary
 - Reseller Info Details
- Supplier Reports**
 - Supplier New Activation
 - Supplier New Cancellations
 - Supplier Current Active Report
- Archive**
 - Report Archive

Figure 17: Reports Section

Manage Orders - You can manage sales (Approve Order) and generate invoice from this section

- **View Uploads** - You can view list uploaded files.
- **Released Orders** - You can view list of orders released by the resellers here
- **Released Accessory Orders** - You can view list of accessory order details.
- **Current Invoice** - You can view list of invoices which are generated by the resellers
- **Archive Invoice** – You can view a list of archived Invoices

Automation CRM

Change Password | Settings | Sign Out

Home | Resellers | Suppliers | Products & Services | Reports | Manage Orders | Support | Provider Relationship | Member Services

Welcome Deepak Baghel! Orders Section Friday, April 01, 2011

- View Uploads
- Released Orders
- Released Accessory Orders
- Current Invoices
- Invoice Archive
- Activation Files
- Shipping Files

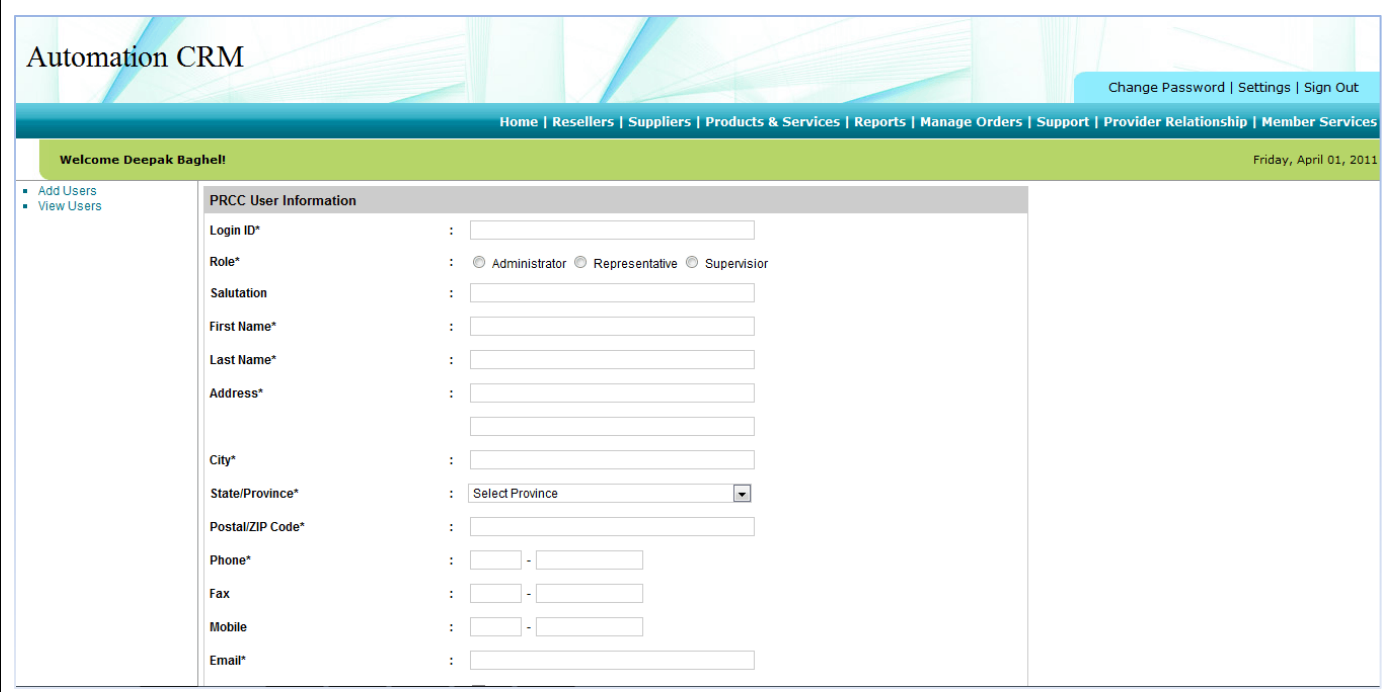
| Order Invoices | | | | | | |
|----------------------------------|-------------|---------------|--------------|----------|---------|------|
| Invoice # | Reseller | L1CompanyCode | Invoice Date | Quantity | Amount | View |
| <input type="checkbox"/> 1790001 | Reseller-19 | MDA | 2011-01-12 | 13 | \$0.00 | |
| <input type="checkbox"/> 1790246 | Reseller-24 | HOO | 2011-01-26 | 1 | \$25.43 | |

| Renewal Invoices | | | | | | |
|----------------------------------|-------------|---------------|--------------|----------|----------|------|
| Invoice # | Reseller | L1CompanyCode | Invoice Date | Quantity | Amount | View |
| <input type="checkbox"/> 1790015 | Reseller-2 | DMK | 2011-01-14 | 12 | \$61.80 | |
| <input type="checkbox"/> 1790016 | Reseller-5 | FMI | 2011-01-14 | 27 | \$348.40 | |
| <input type="checkbox"/> 1790017 | Reseller-21 | HCO | 2011-01-14 | 5 | \$47.39 | |
| <input type="checkbox"/> 1790018 | Reseller-24 | HOO | 2011-01-14 | 20 | \$168.70 | |
| <input type="checkbox"/> 1790019 | Reseller-23 | ILW | 2011-01-14 | 5 | \$76.62 | |
| <input type="checkbox"/> 1790020 | Reseller-19 | MDA | 2011-01-14 | 5 | \$7.50 | |
| <input type="checkbox"/> 1790021 | Reseller-8 | NAT | 2011-01-14 | 2 | \$10.00 | |
| <input type="checkbox"/> 1790022 | Reseller-9 | PIM | 2011-01-14 | 17 | \$60.35 | |
| <input type="checkbox"/> 1790023 | Reseller-10 | PRE | 2011-01-14 | 6 | \$47.50 | |
| <input type="checkbox"/> 1790024 | Reseller-11 | SEL | 2011-01-14 | 145 | \$262.10 | |
| <input type="checkbox"/> 1790025 | Reseller-12 | TDM | 2011-01-14 | 8 | \$89.40 | |
| <input type="checkbox"/> 1790026 | Reseller-13 | TMD | 2011-01-14 | 196 | \$308.25 | |
| <input type="checkbox"/> 1790027 | Reseller-25 | TSC | 2011-01-14 | 2 | \$12.38 | |

Figure 18: Mange Orders Section

Provider Relationship – In this section you can manage Provider Relationship Call Center Users.

- **Add User** – You can add different level of Provider Relationship Call Center user.
- **View** – You can view list of users.
- **Edit** – You can edit information of user.



The screenshot displays the 'Automation CRM' admin interface. At the top, there is a navigation bar with links for 'Home | Resellers | Suppliers | Products & Services | Reports | Manage Orders | Support | Provider Relationship | Member Services'. A user greeting 'Welcome Deepak Baghel!' is shown on the left, and the date 'Friday, April 01, 2011' is on the right. The main content area is titled 'PRCC User Information' and contains a form with the following fields:

| | | |
|------------------|---|---|
| Login ID* | : | <input type="text"/> |
| Role* | : | <input type="radio"/> Administrator <input type="radio"/> Representative <input type="radio"/> Supervisor |
| Salutation | : | <input type="text"/> |
| First Name* | : | <input type="text"/> |
| Last Name* | : | <input type="text"/> |
| Address* | : | <input type="text"/> <input type="text"/> |
| City* | : | <input type="text"/> |
| State/Province* | : | Select Province <input type="button" value="v"/> |
| Postal/ZIP Code* | : | <input type="text"/> |
| Phone* | : | <input type="text"/> - <input type="text"/> |
| Fax | : | <input type="text"/> - <input type="text"/> |
| Mobile | : | <input type="text"/> - <input type="text"/> |
| Email* | : | <input type="text"/> |

Figure 19: Add Provider Relationship Call Center User

Member Services – In this section you can manage Member Services Call Center Users.

- **Add User** – You can add different level of Member Services Call Center user.
- **View** – You can view list of users.
- **Edit** – You can edit information of user.

The screenshot displays the 'Automation CRM' admin interface. At the top, there is a navigation bar with links for 'Home | Resellers | Suppliers | Products & Services | Reports | Manage Orders | Support | Provider Relationship | Member Services'. A user greeting 'Welcome Deepak Baghel!' and the date 'Friday, April 01, 2011' are visible. On the left, a sidebar contains 'Add Users' and 'View Users' options. The main content area is titled 'MSCC User Information' and contains a form with the following fields:

| | | |
|------------------|---|---|
| Login ID* | : | <input type="text"/> |
| Role* | : | <input type="radio"/> Administrator <input type="radio"/> Representative <input type="radio"/> Supervisor |
| Salutation | : | <input type="text"/> |
| First Name* | : | <input type="text"/> |
| Last Name* | : | <input type="text"/> |
| Address* | : | <input type="text"/> <input type="text"/> |
| City* | : | <input type="text"/> |
| State/Province* | : | Select Province <input type="button" value="v"/> |
| Postal/ZIP Code* | : | <input type="text"/> |
| Phone* | : | <input type="text"/> - <input type="text"/> |
| Fax | : | <input type="text"/> - <input type="text"/> |
| Mobile | : | <input type="text"/> - <input type="text"/> |
| Email* | : | <input type="text"/> |

Figure 20: Add Member Services Call Center User