



# Technologies

*Imagine IT*





# SPG CRM Presentation





MIS





Home

FEATURES

Master

Sales Manager

Accounts Manager

Accounting

Daily Visit

Dash Board

Calls Log

Reports

Target Vs Achievement

Report Summary

Ranking System

164,000.00  
Current Year Order

56,500.00  
Current Year Billing

23,500.00  
Current Month Orders

23,500.00  
Current Month Billings

LATEST SALES ORDERS

	Customer : Three R Joints & Seals Pvt. Ltd. Date : (7/12/2017) Account Manager : Rajan Kumar Region Head : Rajan Gupta	13500
	Customer : Anil Saransh & Co Date : (7/5/2017) Account Manager : Rahul Kumar Region Head : Rajan Gupta	10000
	Customer : Rajiv Gurgaon Finance Date : (6/27/2017) Account Manager : Rajan Kumar Region Head : Rajan Gupta	7500
	Customer : Green Clean Facility Management Services Pvt. Ltd. Date : (6/27/2017) Account Manager : Rajan Kumar Region Head : Rajan Gupta	20000

LATEST SALES INVOICE

	Customer : Three R Joints & Seals Pvt. Ltd. Date : (7/12/2017) Account Manager : Rajan Kumar Region Head : Rajan Gupta	13500
	Customer : Argo Laminates Date : (7/1/2017) Account Manager : Sales Head Region Head : Sales Head	10000
	Customer : Kuber Automative Pvt. Ltd. Date : (6/30/2017) Account Manager : Rahul Kumar Region Head : Rajan Gupta	10000
	Customer : Nirmal Bulk Carriers Date : (6/27/2017) Account Manager : Sales Head Region Head : Sales Head	13000
	Customer : Sandeep Dhanker	10000

Activate Windows  
Go to Settings to activate Windows.



Date : (6/27/2017)  
Account Manager : Sales Head  
Region Head : Sales Head

Customer : Nirmal Bulk Carriers 45000  
[Read More...](#)

Account Manager : Sales Head  
Region Head : Sales Head

[Read More...](#)

### PENDING ACTIVITIES DETAILS

[Mark As Read All](#)

- Rajiv Thakur Login Now 09:22:51.6642720 [Read](#)  
Date : (7/15/2017) Time (9 : 51)
- Rajiv Thakur Login Now 09:22:51.4767616 [Read](#)  
Date : (7/15/2017) Time (9 : 51)
- Ankit Singh Login Now 08:34:07.2518928 [Read](#)  
Date : (7/15/2017) Time (8 : 7)
- Ankit Singh Login Now 08:34:06.9862630 [Read](#)  
Date : (7/15/2017) Time (8 : 6)
- Rajiv Thakur Login Now 00:45:55.8024007 [Read](#)  
Date : (7/15/2017) Time (0 : 55)
- Rajiv Thakur Login Now 00:45:55.5680292 [Read](#)

### DAILY VISIT DETAILS

- Daily Visti Details Of Ankit Singh 7/14/2017  
Penden Material Issue And Closed Material Issue  
Customer : NetSqlure
- Daily Visti Details Of Amit Singh 7/13/2017  
Performa Invoice Update  
Customer : LodeStar
- Daily Visti Details Of Rajan Gupta 7/13/2017  
Meeting With CA Anil Maheshwari with Ashu sharma  
Customer : CA Anil Maheshwari Total Order 10 Windows
- Daily Visti Details Of Sameer malik 7/13/2017  
Go to Settings to activate Windows.





# Features of SPG CRM.





1. Master Creation

2. Sales Master

3. Accounts Manager

4. Accounting

5. Daily Visit.

6. Dashboard

7. Calls Log

8. Accounts

9. Reports

10. Target Vs. Achievement

11. Reports Summary

12. Ranking System

13. Submit Call Report

14. Extra Customize Features





# Master Creation





- 1.1. Account Manager
- 1.2. Business Unit
- 1.3. Brand
- 1.4. Company
- 1.5. Country
- 1.6. State
- 1.7. City
- 1.8. Enquiry Type
- 1.9. Enquiry Stage
- 1.10. Enquiry Source
- 1.11. Employee
- 1.12. Product
- 1.13. Product Line
- 1.14. Party
- 1.15. Privileges
- 1.16. Region
- 1.17. Region Head
- 1.18. Party Group
- 1.19. Party Sub Group





- 1.20. Order Type
- 1.21. System Head
- 1.22. Vertical
- 1.23. Target
- 1.24. Tax Type
- 1.25. Invoice Type
- 1.26. Item Status
- 1.27. Payment Status
- 1.28. Purpose
- 1.29. Material Type
- 1.30. Master Report Settings





# Sales Manager





- 2.1. Enquiry
- 2.2. Quotation
  - a) New Quotation Log
  - b) Enquiry to Quotation
- 2.3. Sales Order
  - a) New Sales Order
  - b) Quotation to SO
- 2.4. Service Order
  - a) New Service Order
  - b) Service offer to Service Order
- 2.5. Purchase Order
  - a) New Purchase Order
  - b) Sales Order to Purchase Order
- 2.6. Performa Tax Invoice
  - a) New Performa Tax Invoice
  - b) Sales Order to Performa Tax Invoice
- 2.7. Performa Service Invoice
  - a) New Performa Service Invoice
  - b) Service Order to Performa Service Invoice





## 2.8. Work Order

- a) New Work Order
- b) Service Order to Work Order

## 2.9. Performa Retail Invoice

- a) New Performa Retail Invoice
- b) Sales Order to Performa Retail Invoice

## 2.10. Service Offer

- a) New Quotation Service Offers
- b) Service Inward to Service Offer





# Accounts Manager





- 3.1. Purchase Invoice
  - a) New Purchase Invoice
  - b) Purchase Order to Purchase Invoice
- 3.2. Sales Invoice
  - a) New Sales Invoice
  - b) Sales Order to Sales Invoice
- 3.3. Inward Service Invoice
  - a) New Inward Service Invoice
  - b) Work Order to Inward Service Invoice
- 3.4. Purchase Return
  - a) New Purchase Return
  - b) Purchase Invoice to Purchase Return
- 3.5. Sales Return
  - a) New Sales Return
  - b) Sales Invoice to Sales Return
- 3.6. Outward Service Invoice
  - a) New Outward Service Invoice
  - b) Service Order to Outward Service Invoice
- 3.7. Material Inward
- 3.8. Material Outward





# Accounting





- 4.1. Group
- 4.2. Bank Name
- 4.3. Account Ledger
- 4.4. Account Bank
- 4.5. Account Reference Type
- 4.6. Bills Receivable
- 4.7. Bills Payable





# Daily Visit





- Home
- FEATURES
  - Master
  - Sales Manager
  - Accounts Manager
  - Accounting
  - Daily Visit
  - Dash Board
  - Calls Log
  - Reports
  - Target Vs Achievement
  - Report Summary
  - Ranking System

**Daily Visit Reports Details**

Add New Total Record 66 Export

Page 1

Serial	Employee	Image	Date	Customer Name	Travel Km	Accompanied By	Remarks
1	Amit Singh		7/13/2017	LodeStar	0	Amit	Performa Invoice Update
2	Rajan Gupta		7/13/2017	CA Anil Maheshwari	70	Rajan	Meeting With CA Anil Maheshwari with Ashu sharma
3	Sameer mallik		7/13/2017	GST Software	NA	Ambika Mam	Member Regestration + Member Login Purchase Create Design .....
4	Ankit Singh		7/13/2017	NetSquire	0	Rajiv sir	Complete BOM To Matrial Issue and Details and Delete of purchase Indent stock
5	Rajan Gupta		7/12/2017	3R Joint & Seal	12	Rajan	1) Meeting with Santosh Gosai (3R Joint N Seal) Recieved Amount 12430/- 2) Visit 2



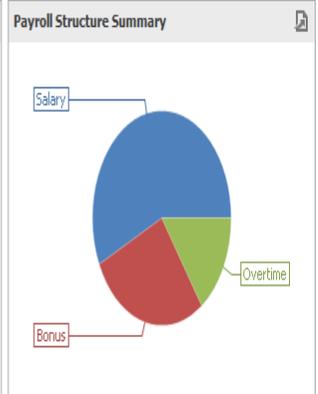
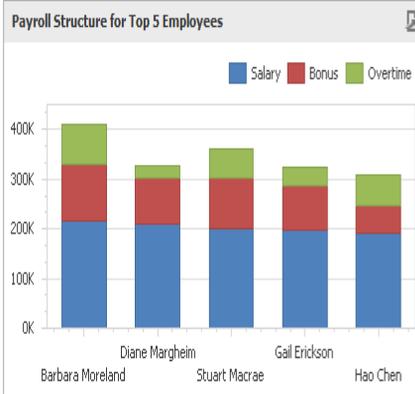
# Dash Board



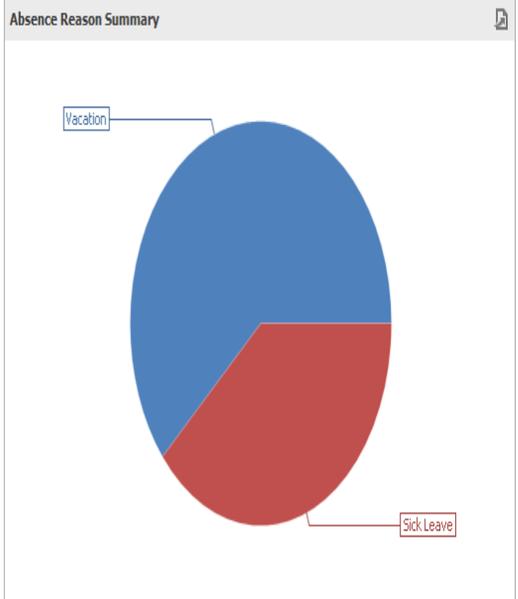
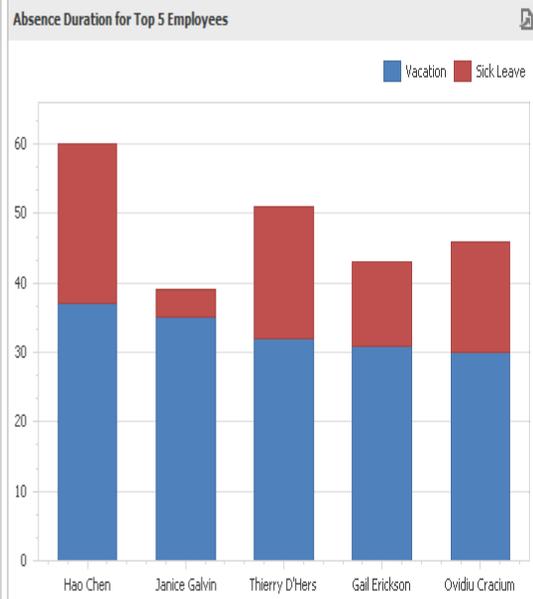


### Human Resources 2010, Research

Year	Turnover	Turnover
2003		0.00 %
2004		0.58 %
2005		0.62 %
2006		0.83 %
2007		0.36 %
2008		0.25 %
2009		0.76 %
2010		0.49 %
2011		0.98 %
2012		0.35 %
2013		0.57 %



Department	Turnover
Inventory Management	0.49 %
Manufacturing	0.51 %
Research	0.00 %
Sales and Marketing	0.95 %





## Active Incident Dashboard

Status



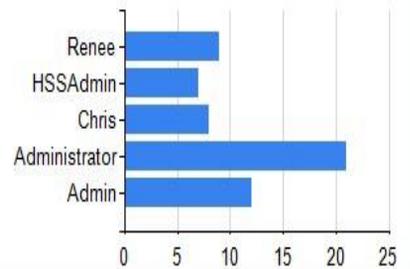
■ CHECK SLA 
 ■ Pending 
 ■ Suspended 
 ■ Open

Aging



■ More than 100 Days 
 ■ 41 to 100 Days 
 ■ Less than 1 Day 
 ■ 21 to 40 Days

Top 5 Receivers by Volume

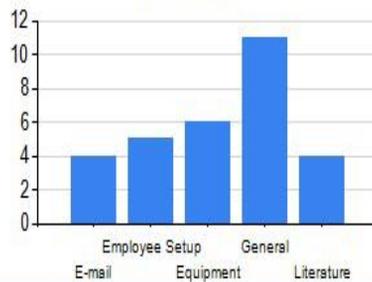


Priority

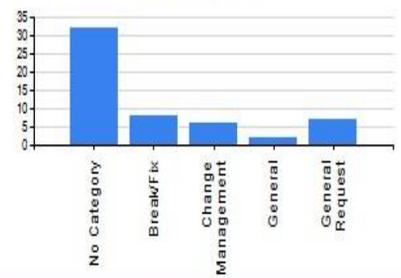


■ 1 
 ■ 2 
 ■ 3 
 ■ 4 
 ■ 5

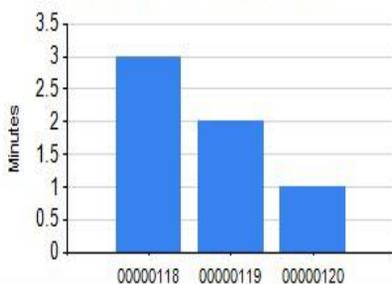
Top 5 Call Types



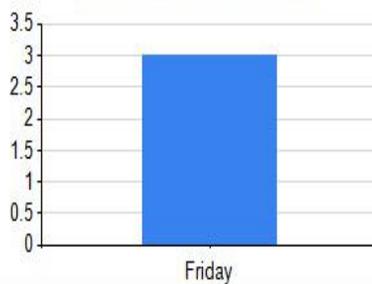
Top 5 Categories



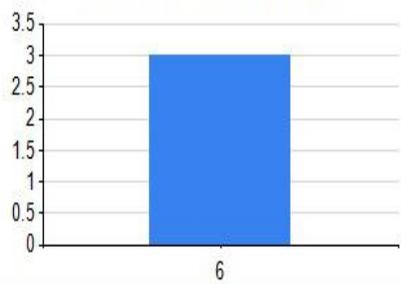
Today's Top 5 Oldest Active Priority 1's



Active Incidents Created This Week



Active Incidents Created This Month





# Call Log





7.1. Add New Call

7.2. Pending Call Visit





# Accounts





- 9.1. CST/VAT Paid
- 9.2. Purchase Details
- 9.3. Sales Details
- 9.4. Purchase CST Summary
- 9.5. Sales CST Summary
- 9.6. Purchase VAT Summary
- 9.7. Sales VAT Summary
- 9.8. Payment
- 9.9. Receipt





# Reports





- 10.1. Enquiry Report
- 10.2. Quotation Report
  - a) Quotation
  - b) Won Quotation
  - c) Lost Quotation
  - d) Live Quotation
  - e) Hold Quotation
- 10.3. Sales Order Report
- 10.4. Service Order Report
- 10.5. Purchase Order Report
- 10.6. Performa Report
- 10.7. Work Order Report
- 10.8. Sales Report
- 10.9. Purchase Report
- 10.10. Purchase Return Report
- 10.11. Sales Return Report
- 10.12. Service Inward Report
- 10.13. Service Outward Report





10.14. Inward Report

10.15. Outward Report

10.16. Stock Report

10.17. Closed Call Details





# Target Vs. Achievement





**Admin**

- Sales Manager
- Accounts Manager
- Accounting
- Daily Visit
- Dash Board
- Calls Log
- Reports
- Target Vs Achievement
- Report Summary
- Ranking System

### Target vs Achievements Details

Total Target **₹28,000.00**
Total Achievement **₹28,000.00**
Balance **₹322,000.00**

Month	Target	Sales Order	Service Order	Achievements	Balance	Quotation
April	0.00	0.00	0.00	0.00	0	0.00
May	0.00	0.00	0.00	0.00	0	0.00
June	180,000.00 <small>1) QT. (180,000.00)</small>	140,500.00 <small>1) QT. (140,500.00)</small>	0.00 <small>1) QT. (0.00)</small>	140,500.00 <small>1) QT. (140,500.00)</small>	39,500.00 <small>1) QT.B. (39,500.00)</small>	180,000.00 <small>1) QT. (180,000.00)</small>
July	500,000.00	23,500.00	0.00	23,500.00	476,500.00	28,500.00
August	500,000.00	0.00	0.00	0.00	500,000.00	0.00
September	500,000.00 <small>2) QT. (1,500,000.00) 1) H.Y. (1,880,000.00)</small>	0.00 <small>2) QT. (23,500.00) 1) H.Y. (184,000.00)</small>	0.00 <small>2) QT. (0.00) 1) H.Y. (0.00)</small>	0.00 <small>2) QT. (23,500.00) 1) H.Y. (184,000.00)</small>	500,000.00 <small>2) QT.B. (1,476,500.00) 1) H.Y.B. (1,516,000.00)</small>	0.00 <small>2) QT. (28,500.00) 1) H.Y. (208,500.00)</small>
October	500,000.00	0.00	0.00	0.00	500,000.00	0.00
November	470,000.00	0.00	0.00	0.00	470,000.00	0.00
December	500,000.00 <small>3) QT. (1,470,000.00)</small>	0.00 <small>3) QT. (0.00)</small>	0.00 <small>3) QT. (0.00)</small>	0.00 <small>3) QT. (0.00)</small>	500,000.00 <small>3) QT.B. (1,470,000.00)</small>	0.00 <small>3) QT. (0.00)</small>
January	500,000.00	0.00	0.00	0.00	500,000.00	0.00
February	500,000.00	0.00	0.00	0.00	500,000.00	0.00
March	500,000.00 <small>4) QT. (1,500,000.00) 2) H.Y. (2,970,000.00)</small>	0.00 <small>4) QT. (0.00) 2) H.Y. (0.00)</small>	0.00 <small>4) QT. (0.00) 2) H.Y. (0.00)</small>	0.00 <small>4) QT. (0.00) 2) H.Y. (0.00)</small>	500,000.00 <small>4) QT.B. (1,500,000.00) 2) H.Y.B. (2,970,000.00)</small>	0.00 <small>4) QT. (0.00) 2) H.Y. (0.00)</small>

1) QT. - Quaterly 2) H.Y. - Half Yearly 3) QT.B. - Quaterly Balance 4) H.Y.B. - Half Yearly Balance 3) QT.E. - Quaterly Exceed 4) H.Y.B. - Half Yearly Exceed

Ranks List FY Setting Rajiv





# Report Summary





# Ranking System





### 13.1. Yearly Ranking

13.1.1. Products Rank

13.1.2. Brands Rank

13.1.3. Business Units Rank

13.1.4. Product Lines Rank

13.1.5. Models Rank

13.1.6. Region Heads Rank

13.1.7. Account Managers Rank

13.1.8. Customers Rank

13.1.9. Vendors Rank

### 13.2. Monthly Ranking

13.2.1. Products Rank

13.2.2. Brands Rank

13.2.3. Business Units Rank

13.2.4. Product Lines Rank

13.2.5. Models Rank

13.2.6. Region Heads Rank

13.2.7. Account Managers Rank

13.2.8. Customers Rank

13.2.9. Vendors Rank





### 13.3. Weekly Ranking

13.3.1. Products Rank

13.3.2. Brands Rank

13.3.3. Business Units Rank

13.3.4. Product Lines Rank

13.3.5. Models Rank

13.3.6. Region Heads Rank

13.3.7. Account Managers Rank

13.3.8. Customers Rank

13.3.9. Vendors Rank





# Submit Call Reports





14.1. Daily Work Report

14.2. Service Call Visit

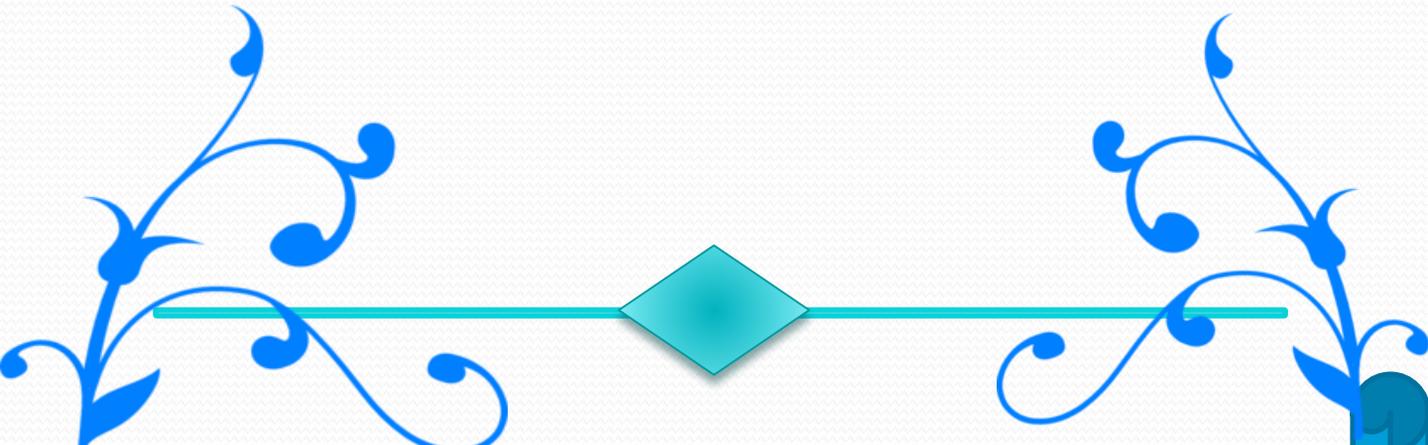
14.2.1. New Call Visit

14.2.2. Review Previous Visit





Thank  
you!



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