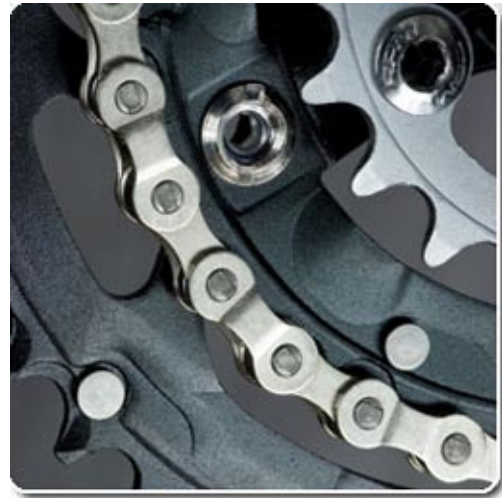


## JAM CRM



## Introduction

To build a customer relationship management system to handle multiple departments within a corporation have at least some indirect access to customers, or customer information; the goal of this system is to collect that information in a central repository, analyze it, and make it available to all departments.

The system will be used for implementing policies that promote the collection of customer information, and the use of that information by individuals throughout the company in order to maximize customer service and increase sales.

## Helpdesk

This module is a helpdesk system for users to submit and track their enquiries online. The user can register on the website and add new enquiry. The user can also view the enquiry status with the help of enquiry tracker.

## Enquiries Management

This module will be used to create and manage customer enquiries with your products along with the related information such as date, enquiry type, enquiry status, action taken etc.

Search enquiries by fields and keywords

Enquiries can be added by two ways:

Administrator can add enquiry against any person, who enquired, this user can be existing client or can be any new person, for both cases admin will first create user for enquiry (helpdesk user) and then select that user when adding enquiry.

User can create Enquiries through website, where he/she has to first register and then login to control panel to add and manage enquiries,

## Activities Management

In activity module you can create and manage activities such as scheduled calls, meetings and emails.

You can also view the activity history for an individual.

In each activity more than one user and more than one client can be added (invited) as a participant.

You can issue email notifications, view today's activities in calendar.

## Contract Management

Contract Management Module provides facility to manage contracts. It provides several types of

templates for contracts e.g. License contract for the new client. It also records and tracks contract status

## Calendar

This powerful tool works as a dash board. Use the Calendar module to view/create activities related to calls and meetings. The calendar displays your meetings and calls scheduled for the day.

By all

By person

Different types of views are available for calendar e.g. day, week, month and year view. You can move backwards and forwards in the calendar- by one day, week, month or year. In the week, month or year format, you can click on any date to view that date in day format.

A Shortcuts section that displays the following options:

Schedule Call

Schedule Meeting

Calls

Meetings

## Search Engine

The Search Engine provides filters to choose the module for which you are going to search or to search a record in all the specified modules.

## Administration

Administration module manages users, products and clients information. It also provides management of email templates to be used for newsletters, clients reply and email circulation.

## Reports

Different reports are available for clients, enquiries, contract and activities.