



## CUSTOMER RELATIONSHIP MANAGEMENT AUTOMATING SALES OPERATIONS

*Kiosk Solutions* Customer Relationship Management (CRM) has been developed to meet the requirements of construction firms and real estate societies to automate their operations with emphasis on Property Sales and Customer Management. System comprising of following modules:-

- Administrative Module.
- Sales and Customer Management Module.

### Description of Modules

**1. Administrative Module:** This module deals with system administration and security. Security and access control features of this system make application secure in all respects.

Its main features include:

- **User Management:** Users earmarked to use this system can be created.
- **User Rights Management:** Users as per assigned role are assigned the management rights.
- **Role Management;** Administrator can create, modify & view roles.
- **User Management;** Administrator can create, modify & view all the created users, can also activate/deactivate uses & can assign roles to specific users
- **User Access Management;** Menu of application is fully customizable by administrator, assigns button level rights on particular page based on role.

**2. Sales and Customer Management:** It comprises of two sub-modules namely Sales Management and Customer Management.

a. **Sales Management:** This sub-module handles lead generation, conversion of lead into opportunity and process to handle unattended opportunity, will manage sales orders and exact position of the order.

- i. **Lead Generation:** An authorize person (Sales Manager/Supervisor) or any person from the management can enter a lead in the system, as a result of some query, email, telephone call etcetera. Same will be assigned by him / her to a concerned sales person / agent.
- ii. **Conversion of Lead into Opportunity:** Leads thus generated will automatically be assigned to same executive. Thus all leads will be assigned to the sales force through the system.
- iii. **Selected Customers:** Once an opportunity matures, the customer data and account will be created automatically by the system.
- iv. Once a new lead is generated regarding potential customer, a log shall be maintained to show who all contacted him (made a marketing call) with date and time. A customer data-base in this connection shall be developed.

b. **Customer Management:** It develops customers' data and their profile along with properties in which he has shown an interest or property already purchased. An individual customer account for each active customer should be maintained with a detail log of activity. A customer profile shall include its personal data, data about property already held, type of property in which customer is interested in e.g. residential, commercial, any other etcetera.

c. **Additional functionalities**

- i. Each lead can be a part of any Contact group. Contact groups can be made, based on interest, area, budget, etc.
- ii. Any lead which is not assigned to any group will fall under one category
- iii. Able to see what activity is done on each lead (Option to save multiple remarks, on each lead)

- iv. Access based on Hierarchy CRM will allow to Schedule Task or add a reminder with each lead, by linking through calendar date/time (e.g. call the client on xx-xx-xx for feedback, or client visit on xx-xx-xx at xx pm)
- v. Will be able to send material such as Boucher, price list, estimates, etc. to individual or specific group within the CRM.
- vi. Separate lead management (Project wise).
- vii. Overall Summary of each project and if required to see the detail, than that will also be possible.
- viii. Option of sending Bulk email from the CRM to customers/potential leads, to all leads, or to a specific group, etc.
- ix. If bulk email option cannot be developed, than integration of the CRM with Mail Chimp would be created

## Software Features

**1. Integrated Archiving Solution:** The salient functionalities of the Archiving solution includes following:-

- a. **Creation of Initial Database;** *Kiosk Solutions* understands that initial database created will serve as a premature optimization.
- b. **Reporting Tool;** the solution will be embedded in Microsoft Reporting tool, which will generate the desired reports; both adoch and custom built. Provided full details of reporting dimensions, the software smartly generates and deliver those reports.

## 2. General Features

- a. All the modules being offered are totally integrated i.e. Information from one module to other module will move automatically. The feature of integration is available even if the modules are installed one at a time.
- b. All modules include their respective management reports. All the reports generated by the system can be viewed on screen; printed; or exported to MS Excel, MS Word or Text Formats.

- c. The system provides the facility to record and retrieve information conveniently and efficiently.
- d. The system is menu driven, user friendly and the user has the option to operate it with both keyboard and mouse.

## Conclusion

This CRM System is being offered to builders and construction companies to automate their day to day operations and streamline business processes. Moreover, it shall lead it towards considerable cost savings and improve its efficiency in areas such as customer acquisition, handling, and effectively managing own work force.

The software is highly cost effective and core objective behind this whole exercise is to deliver a CRM solution, based on the objectively reviewing the requirements of builders and construction companies in order to justify the IT spending.

*Kiosk Solutions* shall arrange a presentation to explain the whole concept, including the modus operandi and clarify further doubts, as per your convenience.

## Contact Person

---

**Lt Col Khalid Hameed Shah (R)**

Executive Director

*Kiosk Solutions*

Ph: 0300-8565031

URL: [www.kiosksolutions.com.pk](http://www.kiosksolutions.com.pk)

e-mail: [khalid@kiosksolutions.com.pk](mailto:khalid@kiosksolutions.com.pk)

**Shaheryar Bhatti**

Manager Business Development

*Kiosk Solutions*

Ph: 0333-2179193

URL: [www.kiosksolutions.com.pk](http://www.kiosksolutions.com.pk)

e-mail: [shaheryar@kiosksolutions.com.pk](mailto:shaheryar@kiosksolutions.com.pk)