Ver 1.x

Client Management Solutions

User Manual

Author: Nishanth Nicholas

www.NishanthNicholas.com

Contents

Table of Contents

1

Introduction

Thank you for your interest in the product. This is a light weight out of the box web based Client Management Solution (CRM) that allows small and medium enterprises to launch their Business to the web in a very short period at a very economical cost. The solution is not just a web page but a complete solution that lets the user showcase products, enable online ordering, manage opportunities and even monitor the business through a convenient web based Business Intelligence module. The product can be accessed on its entirety on a handheld mobile device with a large form factor such as a tablet. No special IT or web administrator skill is required to maintain this solution.

How to read this document depending on the area of interest

The user manual is broken down into two broad sections:

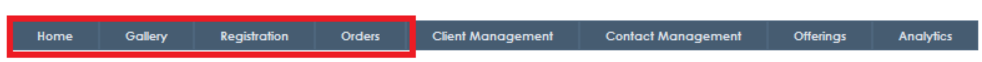
- The Customer Interface section focusses on the parts of the portal which are primarily customer facing such as Home, Gallery, Orders, registration etc. Some of these sections require an authentication whereas some are open to all visitors.
- The Business owner section details the various aspects of the solution that enables the Administrator to not just promote products and services but also to continuously monitor the business in a dynamic fashion. The bulk of the functionality falls into this area. This section also describes in the detail the site management aspects, authentication, Order processing, traffic monitoring, taxation etc.

No technical expertise is required to Administer or use this product. The entire solution and the resulting portal can be customised using intuitive end user settings

2

Customer Focus

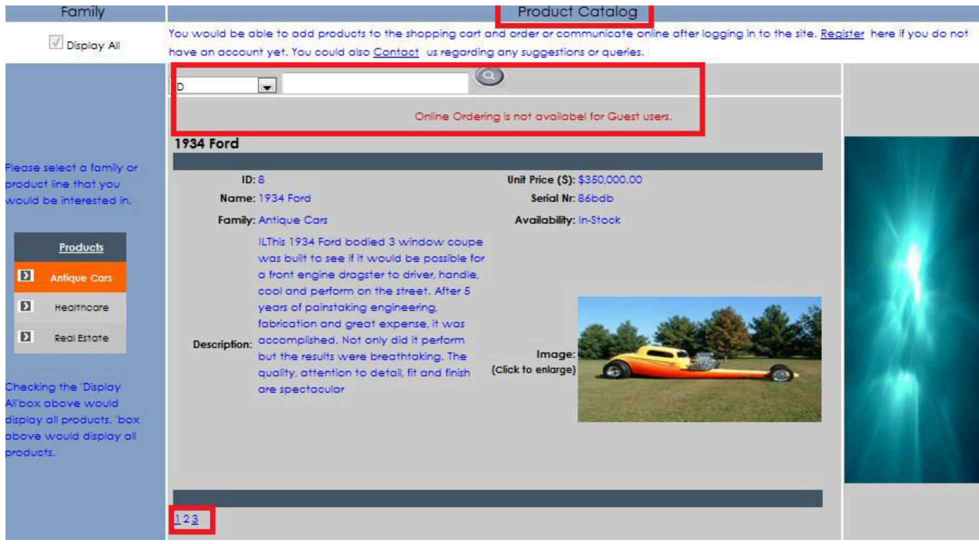
This section of the manual focusses on the parts of the portal that are largely customer oriented with the prime focus on product demos, online ordering and user interface.



Parts of the portal that are largely customer oriented

- **The home page** is the entry point to the portal which provides information to the visitor about the company, the area of operation, list of products, current deals etc. The details of this section can be completely customized by the Administrator as explained in the 'Settings' section of this manual

- **Product catalog** provides a paged display of all products and services of the business. The paging provides a rich user experience wherein the customer can browse through the entire product range or a product family without having to refresh the page. The essential elements of the module are below:



How to navigate through the product Database

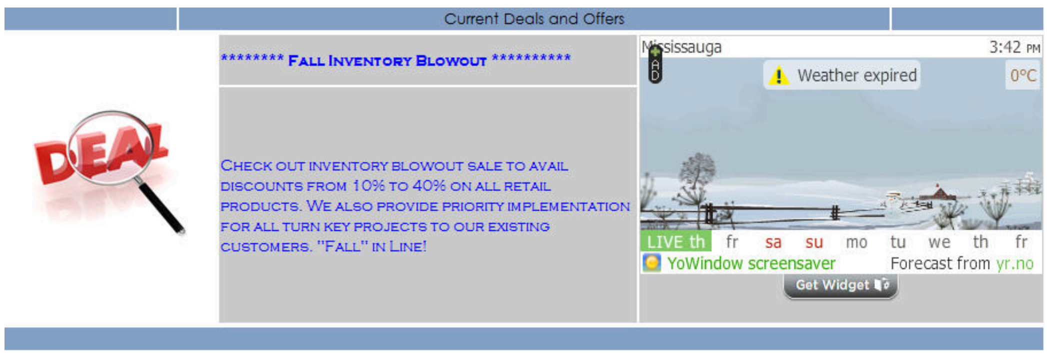
- **Product Family** lists the family groupings of the product on the left tab of the catalog
- **Product Search** enables a search for the products based on ID, name, description etc. The description based search is a powerful feature where customers can search for products based on the faintest of clues that they can recollect.
- **Page view** provides a page by page view of the products without having to refresh the page.

- Please note that an authentication would be required for placing online orders on the featured products. Please refer to the 'Authentication' section of this document for further details.

Though all visitors can browse through the products only authenticated (Logged in) users can place online orders.

- **Deals** section provides up-to-date information about the latest deals and offers that are currently applicable to the business. The look and feel and the text of the section can be customized and changed by the Administrator through the settings and Offerings section.

Current deals and offerings



- **Contact Us** link located at the top left part of all pages in the portal lets the customer/visitor contact the Business via email or telephone (if specified)

- **Product Gallery** page displays the images and details of products and any other business related information (projects, installations, trade fairs etc.) to the customers in a movie/slide show fashion. The Administrator can specify the details of the gallery pages through the 'Offerings' section

Display products and other Project photographs to potential customers

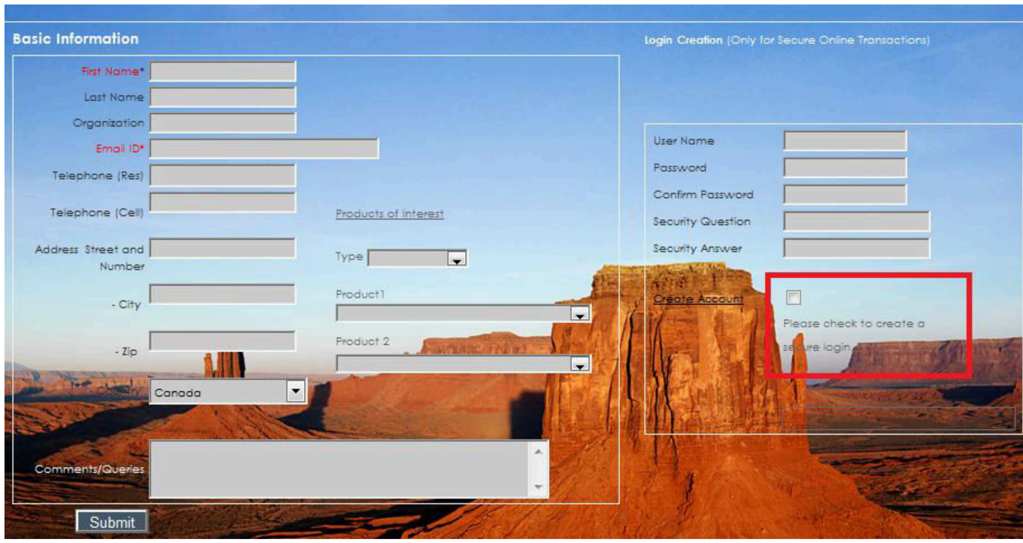
Gallery of Products and Offerings

- **Advertisements** can be placed in any of the customer facing pages of the portal by the Administrator as described in the 'Settings' section of this user manual. The customer would be routed to the target page if the Advertisement is clicked.

- **Registration** page enables the customer to register into the CRM solution. Only the name and the Email ID are mandatory

- **Online ID** is required to be created during registration if the customer wishes to use online transactions like product Ordering.

Register and Update customer profile and Login Information



- **Updation of Customer Profile** can be done using the registration page after a successful login is done. All parameters including the user ID, password, and photograph can be updated using this method.

Register with the Customer Photograph

- **Customer Photo** can be uploaded or captured during the Registration process. Please note that this is an optional step and an explicit permission from the user is required prior to the webcam being used for capture of the picture. The user can alternatelively upload a jpeg image as to be used as the photo.

    - **Webcam Capture** requires the use of the browser that is compatible with the flash plug in a page by page view of the products without having to refresh the webpage.

3

Orders

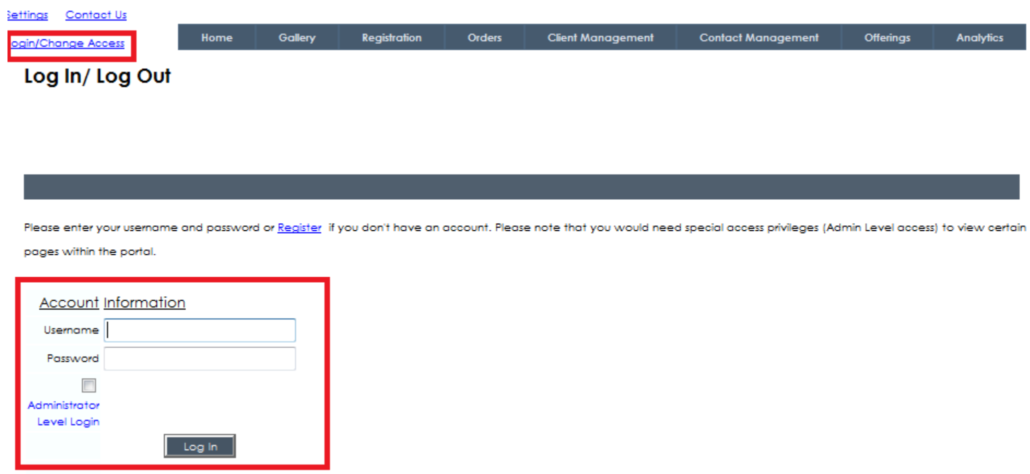
The Ordering page is yet another customer facing part of the portal and deals with the aspects of product selection, quantity management, Order finalization and placement.

The order fulfillment on the other hand is essentially is an administrative function and would be dealt in detail in the Administration part of this document.

Placing an Order

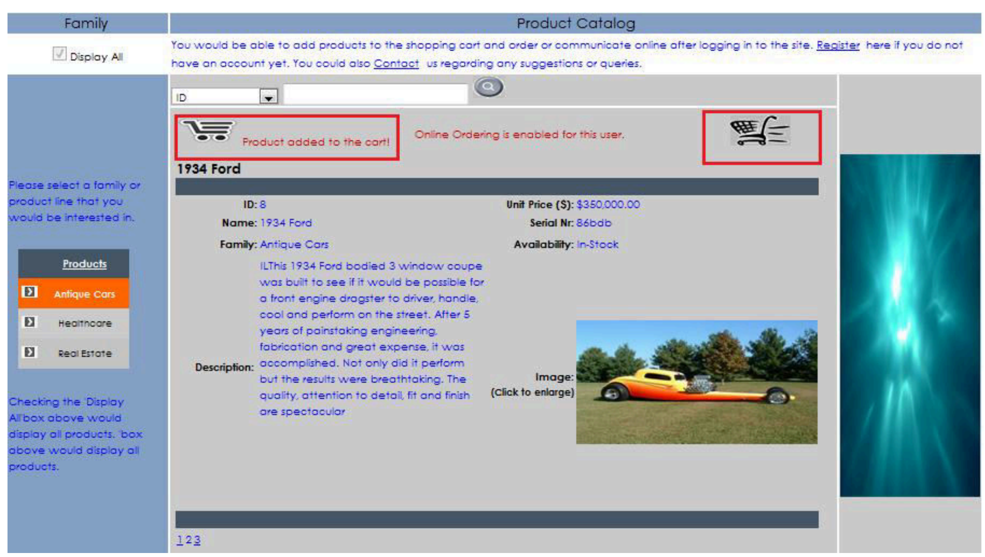
- **Placing Orders** can be done only by logged in users who are customers with a User ID and password. This is used to provide a secure online transaction mechanism. Please refer to the 'Authentication' section to learn about user logins.

- **Customer Login** is required for online ordering to be enabled.



How to select products, update shopping cart and manage quantities

- **Product Selection** for the purpose of placing orders is done through the product catalog in the Home page.



  - **Add to Cart** function lets the user add the current product to his shopping cart

- **Quantity** of products to be ordered can either be adjusted by multiple additions to the shopping cart or by updating the quantity for the selected item in the order confirmation page. It is recommended to made quantity adjustments in the order confirmation page.
- **Deleting items** from the shopping cart can be done by setting the quantity to zero in the order confirmation page or by refreshing the home page to start a new order.

Checkout

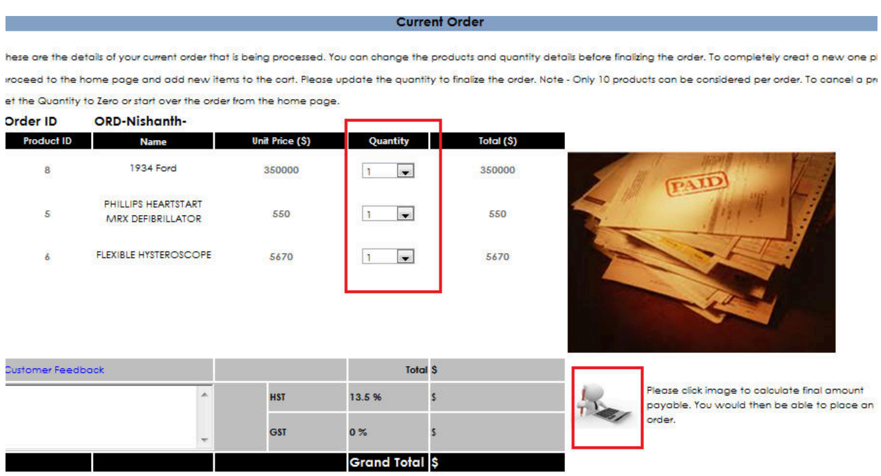
- **Order Limits** are set to enhance manageability and tracking of customer orders. The solution sets a maximum limit of 10 distinct items that can be ordered per customer PO. Each of the ordered products could have various quantities as desired. For example a customer can place an order for 8 products and 5 items of each product.

- **Checkout** function would take the logged in customer to the order confirmation page which you provide a listing of the order along with various other order related details as mentioned below.

Caution

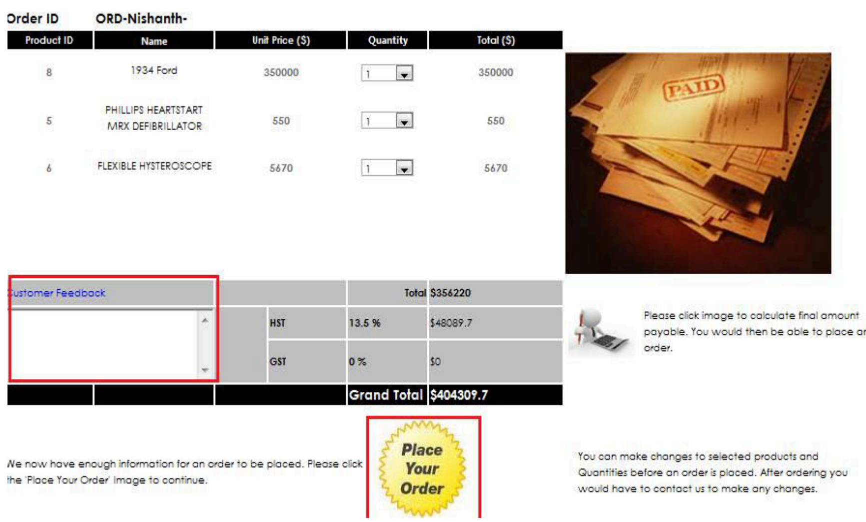
Please note the restriction of a maximum of 10 distinct product types per purchase order

- **Current Order** details are displayed to the customer after the checkout button is clicked and the user is redirected to the Order page. The following actions are available to the user at this point



Update Quantity, Check price and Finalize orders

- **Update Quantity** lets the user increase or decrease the quantity of each product in the order. A zero quantity order cancels the product in the purchase order.
- **Calculate Price** image button would have to be clicked to finalize the order. This action calculates the final price including the applicable taxes. The taxes are set in the application using the settings section as described in this document.
- **Place Order** image button would have to be clicked to finalize the order. This action calculates the final price including the applicable taxes. The taxes are set in the application using the settings section as described in this document.



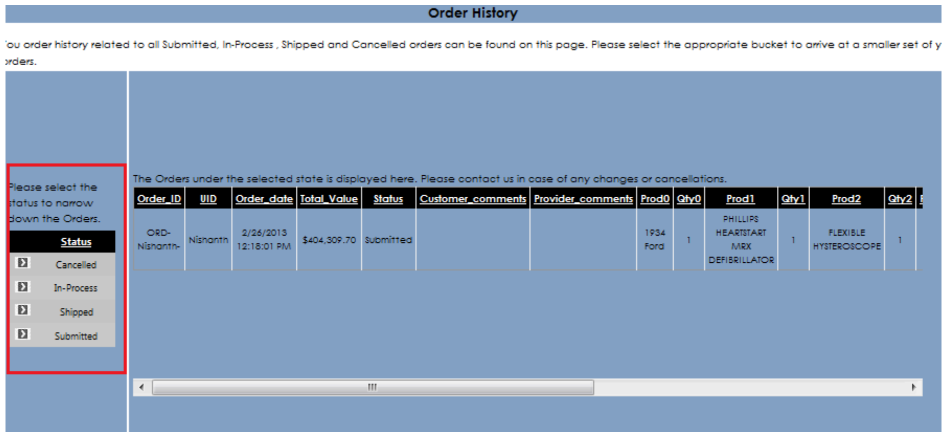
- **Order Comments** can be added by the customer using the customer feedback section of the order.

▪ **Confirmation** of the order is sent via email to both the customer and the administrator when a new order is placed.

Email confirmations are sent to the customer as well as the Administrator when a new order is placed.

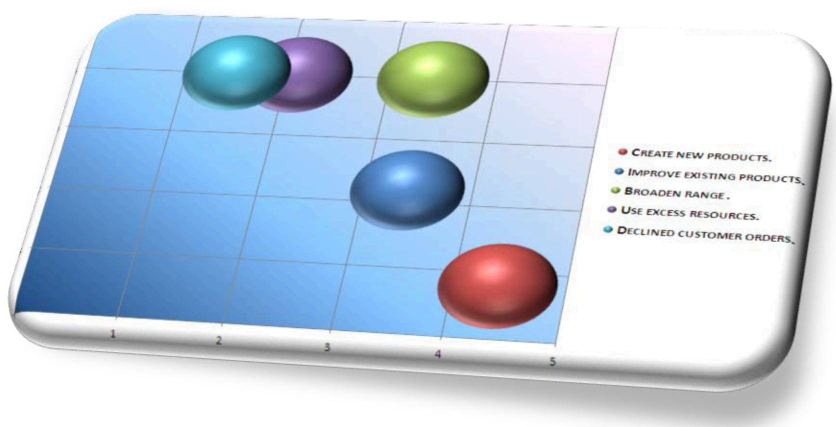
CRM Solutions by Nishanth Nicholas

- **Order History** for the currently logged in customer can be found at the bottom of the order page. The Order history is segregated into the following buckets: Canceled, Submitted, Shipped and In-Process.



Client Management

4



This section touches on the with the opportunity management functions of the solutions which initiates the Administrator/Business owner focussed activities of this CRM product.

The features such as Client management, order fulfilment, new product introductions and analytics are designed to provide total visibility and control of the business to the administrator. An administrator level login access is required to use these functions.

Opportunity and Client management areas are not accessible by logged in Customers

- **Customer/Opportunity Management** can be accessed through the client management tab of the solution and allows the administrator to have visibility over the customer base and their business transactions. An administrative level authentication is required to access this part of the portal.

Customers and Opportunities are broadly defined as follows:
Customers: registered users who have made a purchase of a product or service in the past.
Opportunities: Registered users who have expressed interest but have not yet made any purchases.
The customer and opportunity management is invoked for a record selected based on the search criteria mentioned below

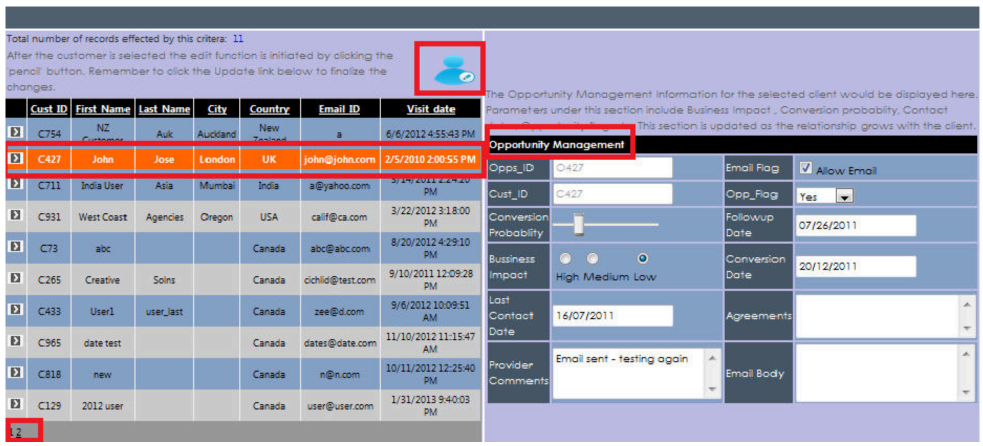
How to search for Customers and Opportunties?

- **Search and Filters** function enables a lookup on the customer and opportunity database in the following ways. All, Opportunities only and Customer only are quick lookups to view the selected segment. Note: The include delete checkbox allows a deleted (or inactive) customer to be included in the search result set. A deleted case is ideally a case where the customer is delisted or barred by the business but still remains in the database.
  - **Customer Demographics** involves a search based on the customer demographics such as name, address, phone, comments etc.
  - **Opportunity parameter** involves a search based on the opportunity parameters such as business impact, conversion probability, conversion date etc.

> *Opportunity parameters have priority over demographic parameters during a search*

- **Schedule** looks up records based on schedule activities for a particular search date.

- **Opportunity Management** is invoked on a selected record based on the result set on the customer grid. The 'Pencil' icon would have to be clicked for the edit mode to be invoked and changes to be made to any opportunity parameter. The important Opportunity parameters are mentioned below



- **ID** both the customer and Opportunity IDs are auto generated by the system
- **Opp_Flag** defines whether the record is an opportunity or a customer. This flag is set to 'No' as soon as a purchase is made.
- **Conversion probability** is a numerical value between 0 and 100 that defines the probability of conversion from an opportunity to a customer status which happens as soon as a firth business transaction is made.
- **Business Impact** is defined on a scale of High-Medium-Low on the estimated impact of the customer to the business.
- **Provider comments** is a free text field that allows the Administrator to record comments related to the customer.
- **Agreements** is a free text field that allows the Administrator to record comments related specific agreements that might exist

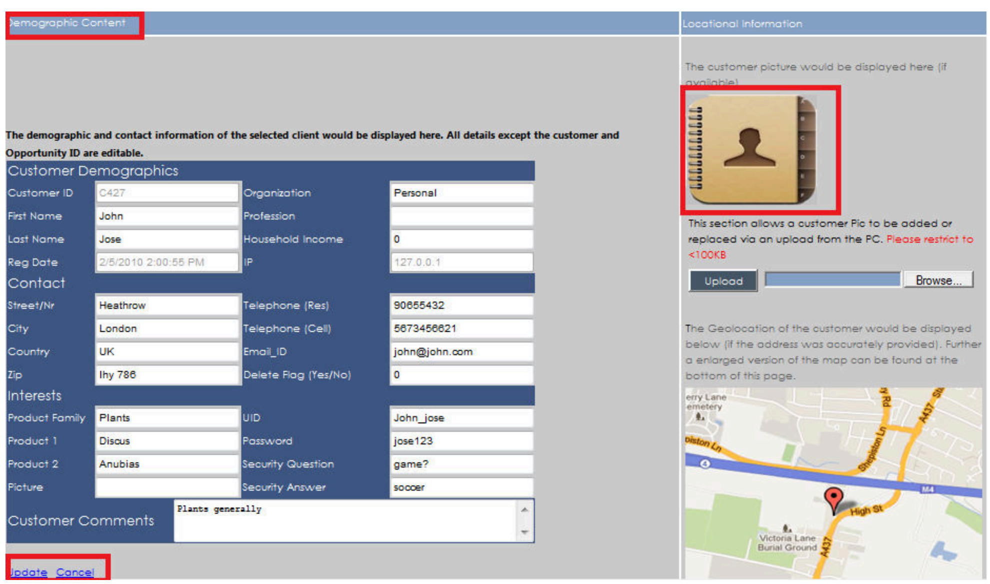
Opportunity Parameters

with the customer or opportunity. An external link to a contract could also be placed here.

- **Email body** is an important free text field that allows the Administrator to store data related to personalized email messages that would be sent to the customers. Salutations and signoffs should not be captured in this area as it will lead to duplication during the automated email body creation step. Please refer to the contact management section for further information on generic and personalized targeted email communications.
- **Date Fields** store important touch point dates based on the customer/opportunity interaction. E.g. the conversion data is the date when the opportunity was converted to a customer status

▪ **Customer Demographics** is invoked on a selected record based on the result set on the customer grid. The 'Pencil' icon would have to be clicked to enter into edit mode and make changes to any demographic information. The demographic parameters are self-explanatory.

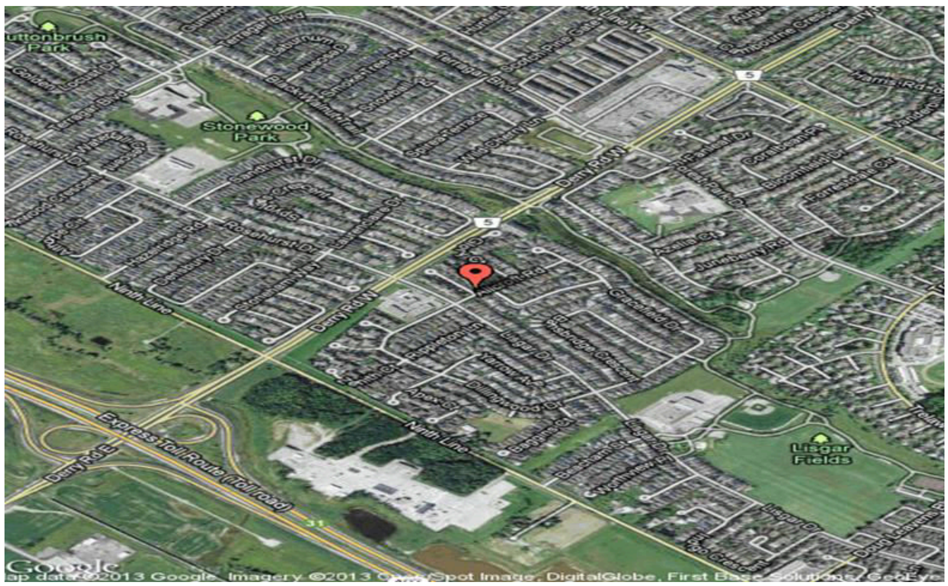
Customer Address and contact Details



- **Customer Photograph** can be updated if required by uploading an existing photograph. If no picture is available a default contact icon is displayed in in the screenshot above. As mentioned in the customer registration update section, the customer can upload or capture his/her picture as a part of the profile update process.

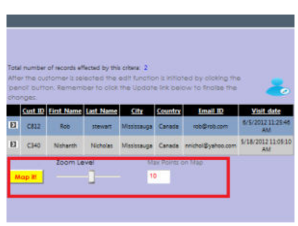
- **Reg Date** is the date of registration and is a non-editable field
- **IP** is the log of the IP address when the customer first registered into the system and is non-editable. This provides important locational information about the client.

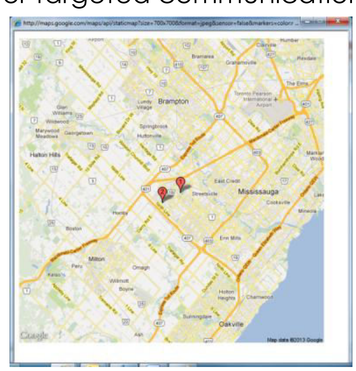
- **Geo-caching Information** is displayed in the form of two maps showing the road map and the satellite terrain map of the customer address using an external service. The accuracy of the mapping information is obviously based on the accuracy of the address provided during registration.



Mapping Client locations

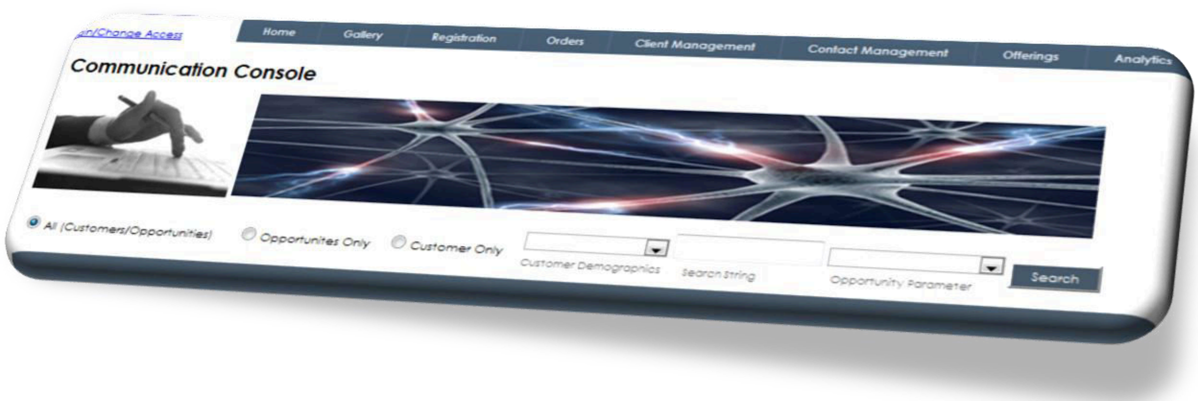
- **Map it!** Function allows customers of the same city or country to be displayed on a map pop up when a city or country based search is made. The map is visible at the bottom of the page in case of mobile handheld devices or in browsers which do not support JavaScript. This feature can be used effectively in situations like client visits or targeted communication.





5

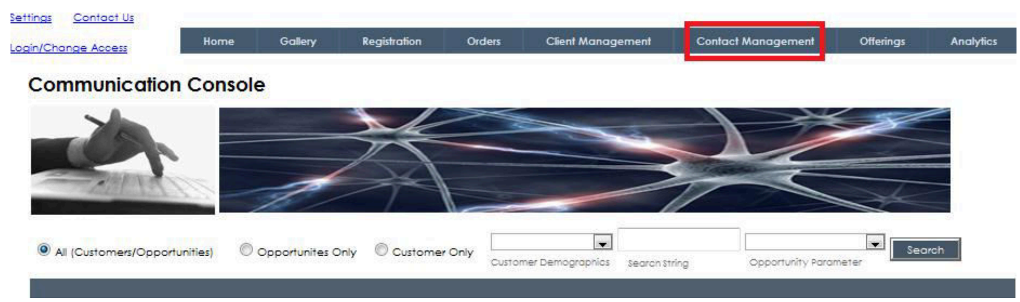
Contact and Communication



The customer and opportunity communication is a core component of the solution which enables the business owner (Administrator) to create a planned communication strategy based on various parameters linked to the customers or opportunities.

The communication mechanism is broadly divided into generic emails to all customers in the selection criteria or targeted one-one communication based on specific customer interaction.
An administrator level login access is required to use this function.

- **Communication Management** function can be accessed through the 'Contact management' section of the portal and allows for email communication to selected customers based on the selections as described below. The list available for selection does not include the customers who have explicitly requested for a communication block. The email message can be created below along with required attachments. Please note that this feature sends emails on Bcc mode by default to protect customer privacy. Please restrict the number of concurrent emails to the maximum number supported by the POP3 or SMTP client.



How to create a target communication list?

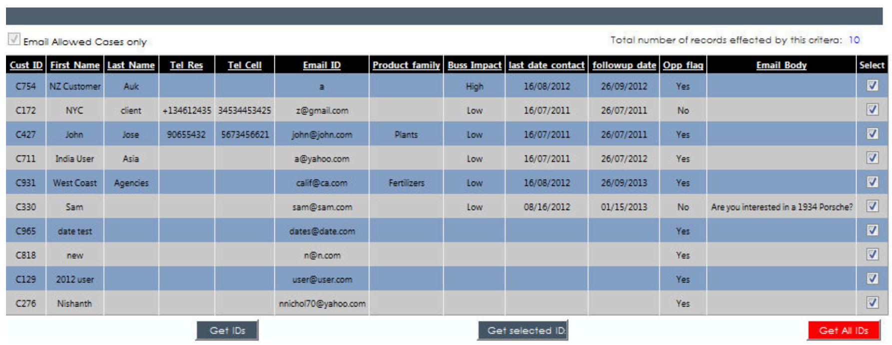
- **Search and Filters** function helps create a dataset for communication. All, Opportunities only and Customer only are quick lookups to view the selected segment. There are many other parameters as described below which helps to zero down on the target segment.
    - **Customer Demographics** involves a search based on the customer demographics such as name, address, phone, comments etc.

> *Opportunity parameters have priority over demographic parameters during a search*

-
    - **Opportunity parameter** involves a search based on the opportunity parameters such as business impact, conversion probability, conversion date etc.
    - **Schedule** looks up records based on schedule activities for a particular search date.

- **Communication strategy** is determined after the target selection is done. The administrator has a choice of two broad alternatives as mentioned below
    - **Generic High Quality Email communication** this approach is more generic but allows for high quality content that can be sent as newsletters to clients that fall under certain criteria such as residents of a city or groups interested in a certain product line etc. A Java based web editor helps create very impressive content and even allows copy-paste from external sources. The email can include attachments if required. Please observe size restrictions on attachments as specified by your mail server.

What communication method to adopt?



Email Allowed Cases only

Total number of records effected by this critera: 10

Cust ID	First Name	Last Name	Tel Res	Tel Cell	Email ID	Product family	Buss Impact	last date contact	followup date	Opp flag	Email Body	Select
C754	NZ Customer	Auk			a		High	16/08/2012	26/09/2012	Yes		✓
C172	NYC	client	+134612435	34534453425	z@gmail.com		Low	16/07/2011	26/07/2011	No		✓
C427	John	Jose	90655432	5673456621	john@john.com	Plants	Low	16/07/2011	26/07/2011	Yes		✓
C711	India User	Asia			a@yahoo.com		Low	16/07/2011	26/07/2012	Yes		✓
C931	West Coast	Agencies			calif@ca.com	Fertilizers	Low	16/08/2012	26/09/2013	Yes		✓
C330	Sam				sam@sam.com		Low	08/16/2012	01/15/2013	No	Are you interested in a 1934 Porsche?	✓
C965	date test				dates@date.com					Yes		✓
C818	new				n@n.com					Yes		✓
C129	2012 user				user@user.com					Yes		✓
C276	Nishanth				nnichol70@yahoo.com					Yes		✓

Get IDs | Get selected IDs | Get All IDs

The follows options are available to make selections from the result set:

Get All IDs: All the email IDs from the database (except the 'email not allowed' cases) would be used to sending the generic emails

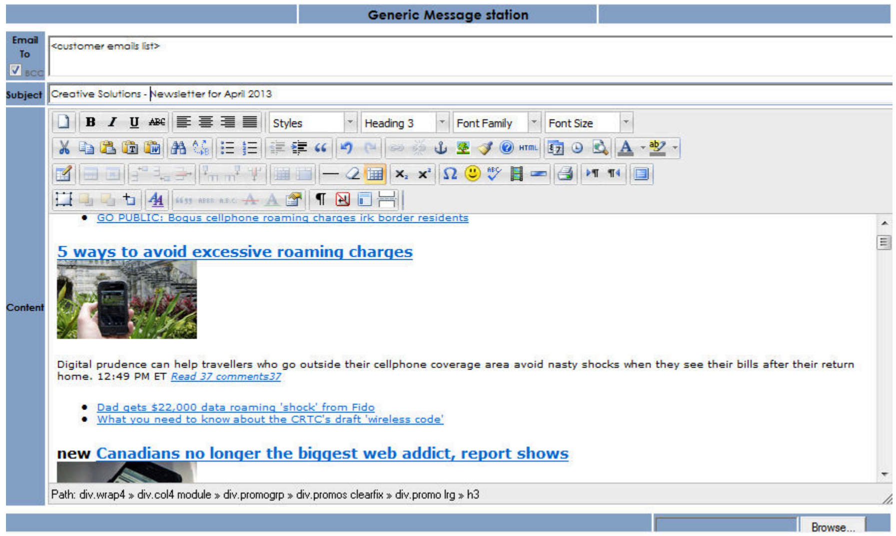
Get IDs: All the email IDs of the result set would be used to sending the generic emails

Get selected IDs: A page by page selection would have to be made to create a very selective list of email recipients.

'Email Not Allowed' cases would not be included in any search result related to communication

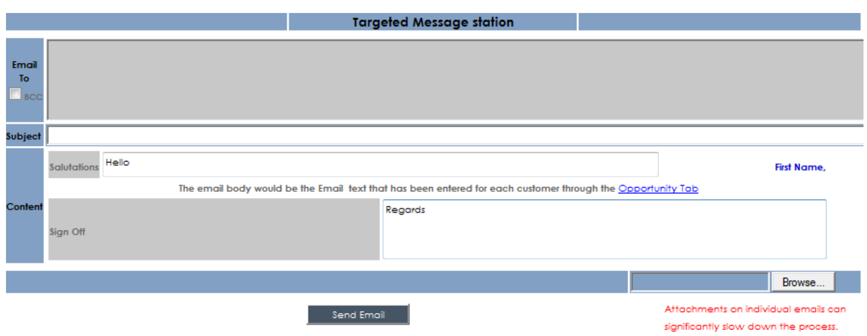
CRM Solutions by Nishanth Nicholas

Generic High Quality Editor



- **Targeted mailing option** would allow the administrator to send one-one emails to customers based on the text entered in the Email body field as a part of the Opportunity Management Tab. This would be a standard automated email sent to the list one at a time and uses non blank information entered in the Email body as the main content. If the Email body field is blank then the customer would not be included in the list. As an additional control is the follow-up date check option which if checked causes only those customers to be included whose follow-up date is equal or prior to the current date. As a last step the email body data would be cleared after operation.

Targeted mail interface

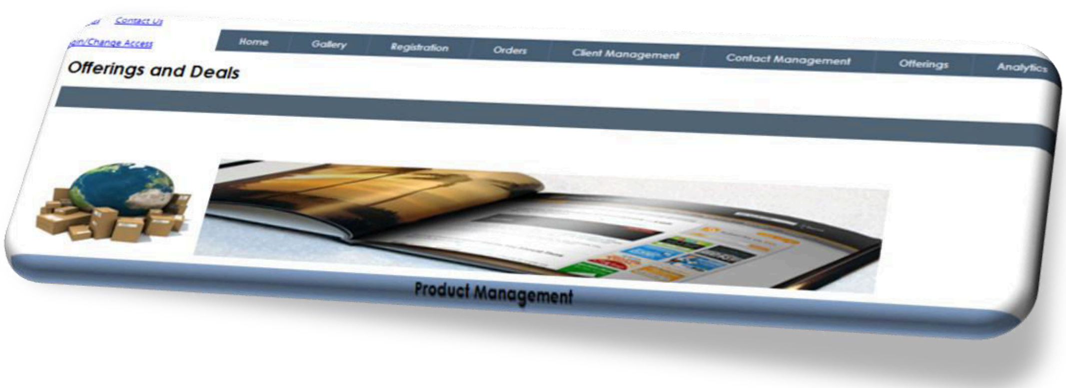


Caution

Please observe size restrictions on attachments as prescribed by your email provider.

6

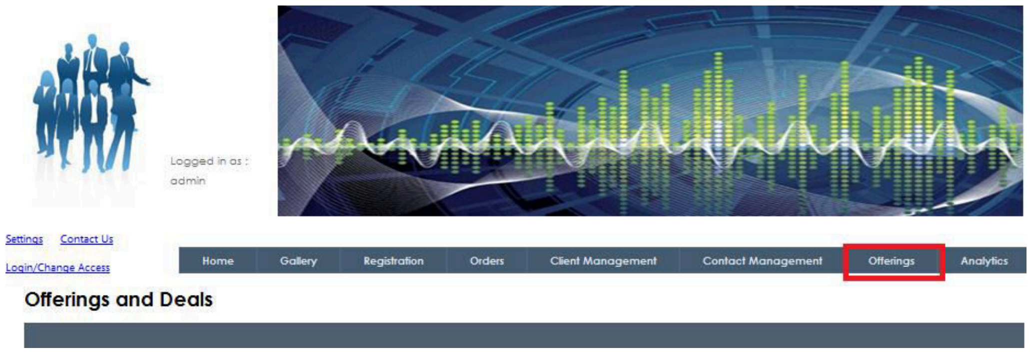
Product Management



Product Management is a critical activity in any commercial application. This is the part of the solution that allows the Administrator (Business owner) to manage the offerings exposed to the customers through the product catalog. The solution provides ample control on the process enabling the Administrator to launch new products, change inventory and pricing information, change traceability information and even delist products.

This section of the manual also covers the handling of product gallery (showcasing) and current deal information. As in the case of other Administrative functions, an admin level authentication would be required to access this area of the portal.

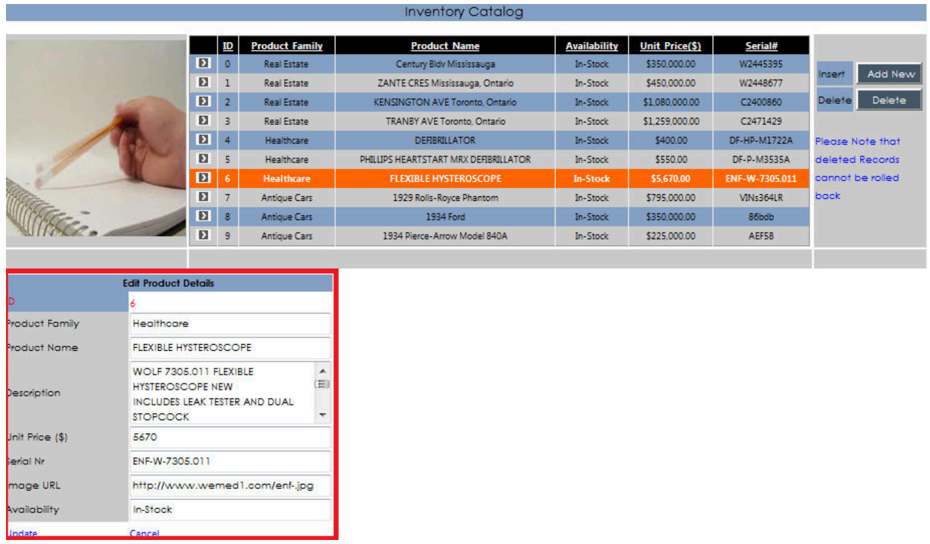
- **Offering and deals** function can be accessed through the ‘Offerings section of the portal and enables features related to inventory catalog, product management and deals.



List of all products in the catalog

- **Inventory catalog** module displays a comprehensive list of all currently active products. This is the core product management area which allows the administrator to add, delist or make changes to any product attribute. The Important attributes are:
- <u>ID</u>: This is a system generated number for internal traceability. The serial nr mentioned below is the commercial parameter for identification.
- <u>Product family</u>: Logic segregation of the product mix. Please be careful of typos when adding products to an existing family as a minor typo would result in a new family being created.
- <u>Product name</u>: is the name of the product
- <u>Description</u>: This field holds a detailed description of the product to about 65535 characters. External links can be used to elaborate further.
- <u>Unit Price</u>: shows the unit price of the product
- <u>Serial Nr</u>: is the unique commercial identifier for the product
- <u>Availability</u>: is a free text field that hold availability values such as In-stock, sold out, Available soon etc. Please use the terms constantly for more accurate analytics as mentioned later in this manual.
- <u>Image Url</u>: Holds the link to the image if available.

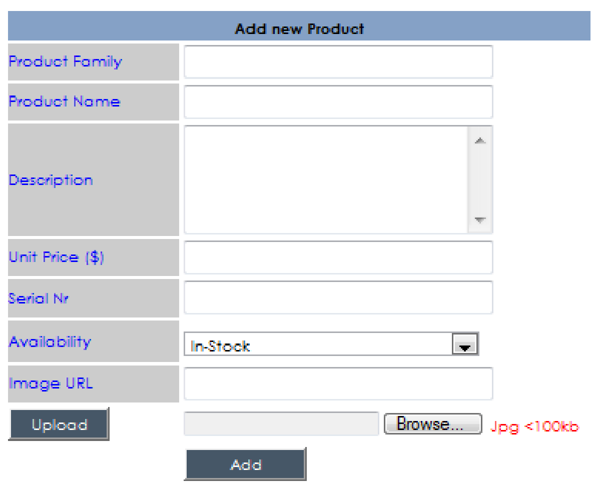
    - **Edit Product** functionality is invoked by selecting the product from the inventory catalog as shown in the image below. An edit screen is displayed to make necessary changes. This feature is normally used to change product pricing or availability or image URLs.


Inventory Catalog

	ID	Product Family	Product Name	Availability	Unit Price($)	Serial#
	0	Real Estate	Century Bldv Mississauga	In-Stock	$350,000.00	W2445395
	1	Real Estate	ZANTE CRES Mississauga, Ontario	In-Stock	$450,000.00	W2448677
	2	Real Estate	KENSINGTON AVE Toronto, Ontario	In-Stock	$1,080,000.00	C2400860
	3	Real Estate	TRANBY AVE Toronto, Ontario	In-Stock	$1,259,000.00	C2471429
	4	Healthcare	DEFIBRILLATOR	In-Stock	$400.00	DF-HP-M1722A
	5	Healthcare	PHILLIPS HEARTSTART MRX DEFIBRILLATOR	In-Stock	$550.00	DF-P-M3535A
	6	Healthcare	FLEXIBLE HYSTEROSCOPE	In-Stock	$5,670.00	ENF-W-7305.011
	7	Antique Cars	1929 Rolls-Royce Phantom	In-Stock	$795,000.00	VINs364LR
	8	Antique Cars	1934 Ford	In-Stock	$350,000.00	86bdb
	9	Antique Cars	1934 Pierce-Arrow Model 840A	In-Stock	$225,000.00	AEF58

Add a new product to the catalog

- **Add New Product** button is located in the inventory catalog panel and helps new products to be introduced to the business. The following panel is displayed which facilitates the addition. Please note that an image can physically be loaded to the server (size restriction of 100kb) or a hotlink can be used to point to an external source. In either case please ensure that adequate rights are available to display the image on your page.



Caution

Please ensure that you have adequate rights to display the image on your page.

CRM Solutions by Nishanth Nicholas

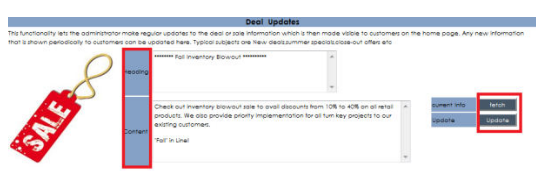
- **Product Delisting** can be done by selecting the related product from the inventory catalog and clicking the 'delete' Button. Please note that the change cannot be undone.

- **Product gallery** this is a powerful feature that lets the administrator/business owner add images related to products or services or any related topic to the web application that gets viewed by the customer through the Product Gallery . The image name and URL are both mandatory fields. While this feature allows new images to be uploaded to the web server it is also possible to hotlink image URLs from external locations. In either case ensure that you have rights to display them on your site. Since the information is predominantly image links the gallery items can either be added or deleted. An edit feature is not provided. However the same can be easily accomplished by deleting a gallery entry and adding the same with a different image or url.

Add or update gallery pictures

- **Deal Updates** allows the administrator to configure changes to information presented to customers in the form of deals or seasonal offers or any other dynamic business information. The important sections and features are:
  - **Heading** is the name of the offer or deal
  - **Deal content** is the detailed information related to the deal or offer to about 65535 characters. External links can also be included to provide further information.
  - **Fetch** button displays the current data stored in the database
  - **Update** button makes updates to the database based on the changes made.

Create or update special sales or deals

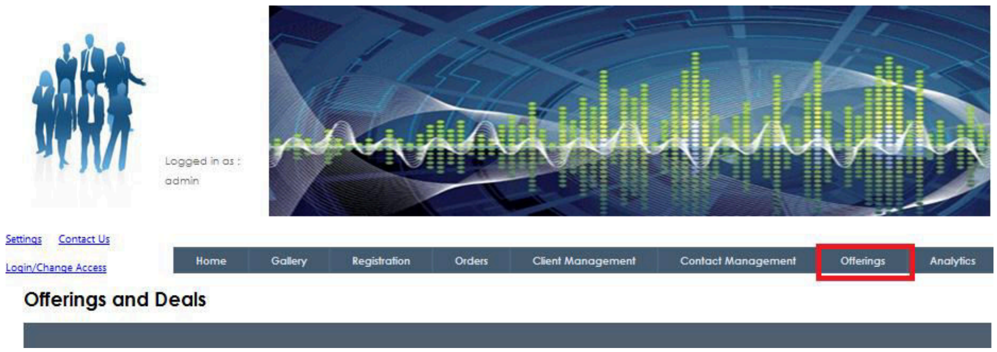


7

Order fulfilment

The order fulfilment is complimentary to the ordering feature described in the customer focus section earlier in this document. The order management section provides the administrator/ business owner with a comprehensive list of all orders that are either processed or in queue at any point in time and enables a tangible worklist for processing orders.

- **Order Fulfilment** function can be accessed through the 'Offerings section of the portal and enables complete order management and notification functions.



What are the stages of Order processing?

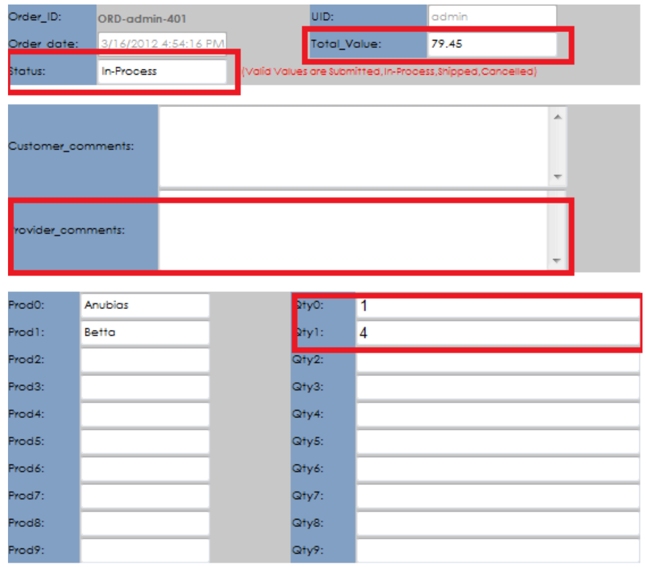
- **Order states** Order processing in the solution is done by making changes to states which are accompanied by the physical change to the ordered products. The order moves across these four logical states based on the processing step: submitted –> In-Process -> Shipped. A Cancelled state is also applicable during any processing stage.

Order Management (Service Provider)

This section allows the provider to manage the existing orders. This concludes activities such as changing states (Submitted-In-Process-Shipped-Cancelled), updating quantities, cancellation of orders etc. Automatic status update notifications will be sent to customers if the checkbox is checked -- ☑ Send Notification to customer on status change

	Order_ID	UID	Order_date	Total_Value	Status	Customer_comments	Provider_comments	Prod0	Qty0	Prod1	Qty1	Prod2	Qty2	Prod3	Qty3	Prod4	Qty
	ORD-cichlid-272	cichlid	9/10/2013 2:09:13 PM	$11.35	In-Process			Anubias	1								
	ORD-Nishanth-	Nishanth	2/26/2013 12:18:01 PM	$404,309.70	Submitted			1934 Ford	1	PHILLIPS HEARTSTART MRX DEFIBRILLATOR	1	FLEXIBLE HYSTEROSCOPE	1				
	ORD-nick123-949	nick123	8/17/2012 1:52:54 PM	$95.00	In-Process			Heater	1								
	ORD-admin-776	admin	6/16/2012 5:04:03 PM	$11.35	Shipped			Anubias	1								
	ORD-Admin-68	Admin	6/15/2012 6:05:31 PM	$79.45	Shipped	Nice site.		Anubias	1	Betta	3	Heater	1				
	ORD-admin-401	admin	3/16/2012 4:54:16 PM	$79.45	In-Process			Anubias	1	Betta	4						
	ORD-admin-614	admin	3/15/2012 3:56:14 PM	$200.00	Cancelled		Need more information	Organic carbon	2	Discus	5	Java Moss	1				
	ORD-admin-250	admin	1/16/2012 5:05:51 PM	$11.35	Shipped			Anubias	1								
	ORD-admin-357	admin	1/16/2012 5:01:57 PM	$96.48	Submitted			Anubias	1	Heater	5						

- **Status change notifications** are controlled by setting the flag on and off which decides if the relevant customer is notified of the status change on the order.
- **Order Processing** window is displayed when an order is selected. The administrator can then make changes on the order including the price and quantity based on requirements or customer input.



The default setting is set to 'yes' for customer notification on Order status change

Caution

Please ensure that these valid states are entered during order status change (submitted, In-process, shipped or canceled)

8

Business Intelligence

The CRM solution has a strong analytics built into the application that provides essential Business intelligence to the business drivers to monitor, control and measure critical business processes. The Key performance Indicators shown are both real-time and high impact and can be effectively used to manage your business.

- **Analytics** page provides the administrator with very intuitive and configurable online analytics about various parameters or key Performance Indicators (KPIs) of the business. These KPIs are mentioned below in detail.

Business Overview at a glance

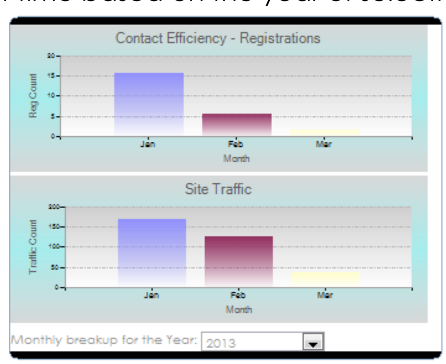
- **Business Dashboard** is the overview of the critical indicators of the business at any point in time. This is displayed in a tabular form and is always provides the latest up-to-date information including traffic, orders, registrations etc.

Business at a Glance			
Total Customers on record	23	New/Unprocessed Orders	0 Check for Unprocessed orders!
Total open Opportunties	90	Product Lines	4
High Impact Customers	4	Product Mix (Total product Offering)	19
Average conversion Time	46 (Days)	Max Order for current Year	$90
Total Web Traffic in current year	340	Web Traffic this month	40

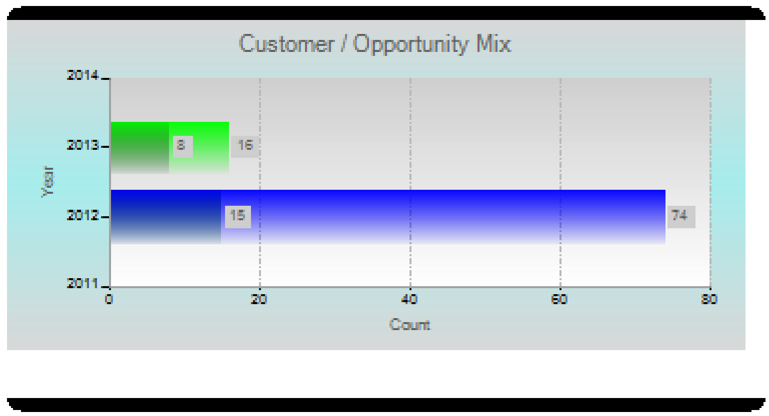
  - **New Order Indicator** is the area within the dashboard that prompts for unprocessed or new orders. This is important in the event that the administrator has overlooked any new order notification emails from the system.

- **Contact and Opportunity Handling** this area focusses on the efficiency of converting leads to customers both in terms of site traffic to registrations and Opportunities to customers

  - **Contact Efficiency** compares the Traffic to registrations to the site for the same period of time based on the year of selection



- **Customer vs. Opportunity mix** analysis the ratio between the opportunities (Registered leads but have not been converted as a customer yet) and Customers.

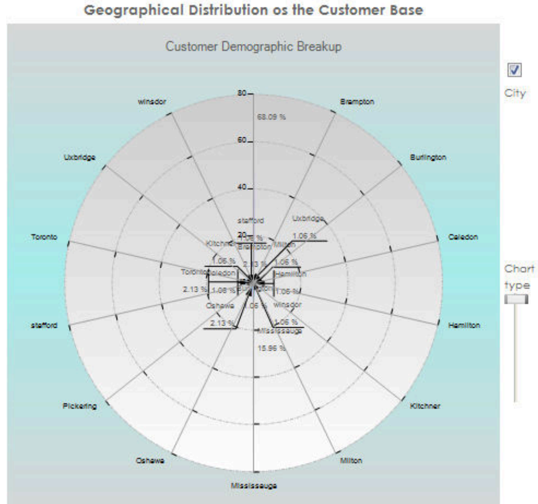


- **Geographic distribution** of the customer base is provided by this analysis. The administrator has the option of selecting the graph type to look at countries and cities in various formats. This information supports Geo targeting as mentioned below.

GeoMarketing

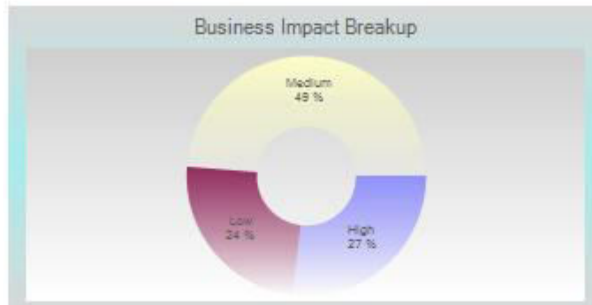
- **Geo Targeting** in geomarketing and internet Marketing is the method of determining the geolocation of a website visitor and delivering different content to that visitor based on his or her location, such as country, region/state, city, metro code/Zip Code, organization, IP address or other criteria.

Geographical Distribution os the Customer Base



How profitable are your customers?

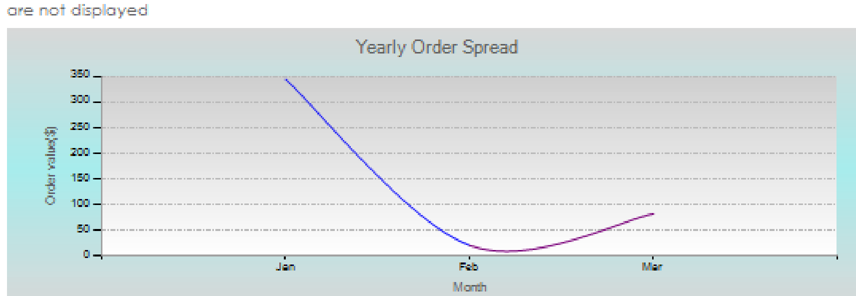
- **Business Impact** provides a breakup of the entire customer base on a spectrum of high, medium or low. The combination of the Business Impact, Opportunity and conversion turnaround time gives a good indication of the profitability mix to ensure that the business is focusing on the right target customer base.



- **Orders** this section touches on the following important KPIs related to orders within the business helping the Business owner make key decisions based on the current standing on the orders and revenue.

  - **Order Spread** across the months for a selected year gives an indication of seasonality within the business. This Indicator should be looked at in conjunction with the customer registrations for the same period to get a better understanding of the trend.

Order spread across the months for the selected year. If there are no orders for a period then the month(s) are not displayed

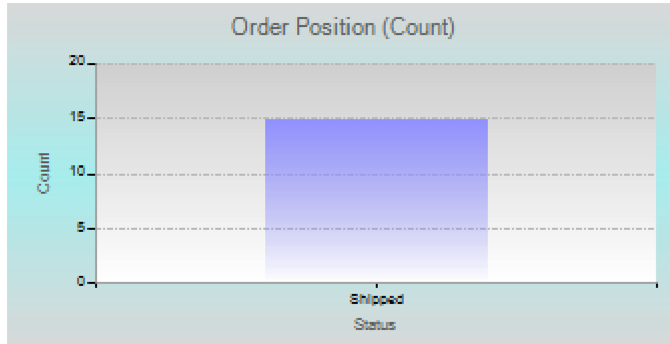


Monthly breakup for the Year: 2013

  - **Order position (Count)** as a Key Indicator helps the business to identify gaps and bottlenecks in the order fulfilment process. This is an important metric that helps reduce the Turnaround time in Order processing.

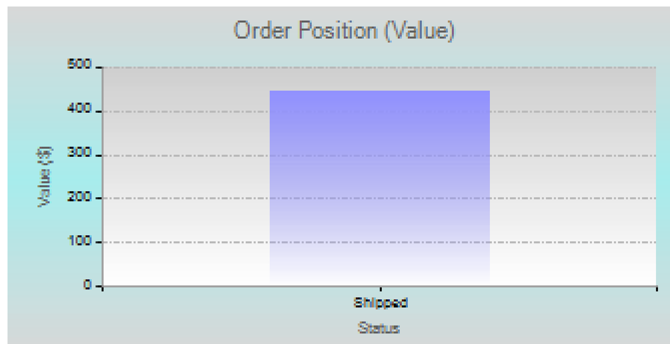
Order Line of sight

Order Position YTD expressed as count of orders in each bucket



- o **Order position ($ volume)** measure orders in dollar terms as an YTD value.

Order Position YTD as value($) of orders in each bucket

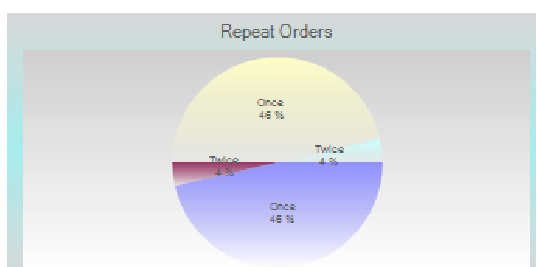


- **Customer Loyalty** the solution provides details on two KPIs that provides an indication customer loyalty and business impact

  - o **Repeat Orders** metric provides an indication of the customer loyalty and satisfaction. The chart shows the breakup of customers who have orders once, twice, thrice or more.

Customer Loyalty

Repeat Orders and customer Loyalty



- **Top 5 customers** this gives an up to date indication of the top 5 customer based on the yearly orders. (One or more customers with the same order value would feature separately)

Top 5 Customers based on Yearly orders (Might include multiple occurances of the same order value)

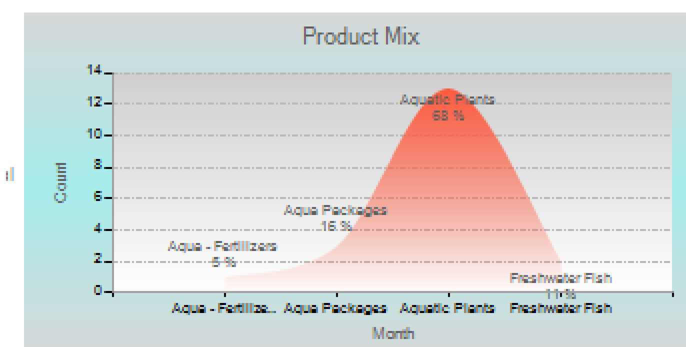
Total_Order	Cust_ID	First_Name	Last_Name	Yr
170	C160	Angela	B	2013
50	C827	John	C	2013
40	C119	John	C	2013
25	C701	Oscar	F	2013
20	C929	Evan	B	2013
20	C246	Fred	R	2013
20	C21	Jennifer	M	2013
20	C162	Sarah	A	2013

- **Product Mix and Performance** indicators mentioned below provide visibility into the product categorization and performance.

  - **Product Mix** analysis shows the total products within each family. This is very useful to get an overview when large numbers of products are managed by the business.

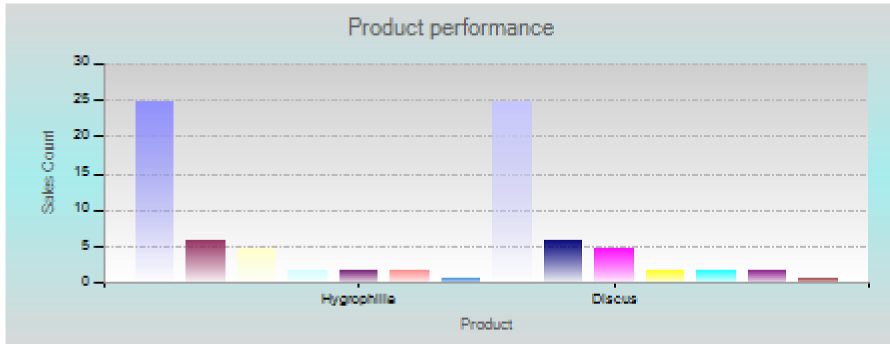
Product Mix and Performance

Product lines and mixes in the current portfolio



  - **Product Performance** as a function of the total sales quantity of the product. This gives an indication of the high demand top 10 products within the mix.

Top Product list as a function of sales volume



- **Web Traffic Monitoring** is an inbuilt comprehensive traffic analysis that helps the administrator to have total visibility into the geographical locations of visitors. This helps for geo-targeting customers, security and audits and for various other monitoring and marketing needs.

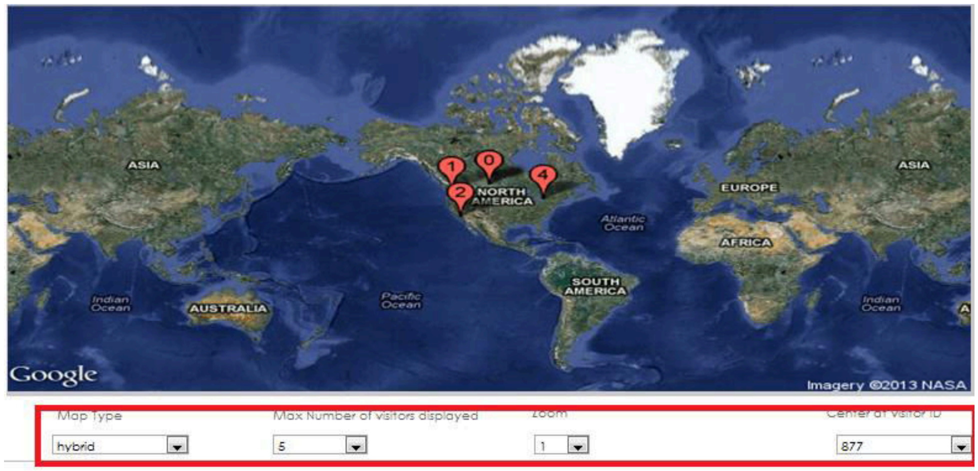
  - **Traffic Grid** provides a tabular display of all visitors to the site (excluding the IP ignore list as explained in the settings section) showing the visit date, IP address, country, city and latitude and longitude.

ID	Visit date	IP	Country	City	Latitude	Longitude
877	3/13/2013 9:08:37 AM	198.169.189.226	Canada	Regina	50.45	-104.6167
876	3/13/2013 8:50:18 AM	65.55.52.96	United States	Redmond	47.674	-122.1215
875	3/13/2013 8:32:17 AM	157.55.33.125	United States	Beverly Hills	34.0995	-118.4143
874	3/13/2013 7:42:53 AM	198.169.189.225	Canada	Regina	50.45	-104.6167
873	3/11/2013 9:31:51 AM	70.52.128.111	Canada	Oakville	43.4333	-79.6667
872	3/11/2013 8:31:55 AM	70.52.128.111	Canada	Oakville	43.4333	-79.6667
871	3/10/2013 4:25:21 PM	180.76.5.65	China	Beijing	39.9289	116.3883
870	3/10/2013 9:43:58 AM	174.116.242.212	Canada	Toronto	43.6667	-79.4167
869	3/9/2013 3:51:15 PM	157.55.33.125	United States	Beverly Hills	34.0995	-118.4143
868	3/9/2013 3:12:11 PM	65.55.52.96	United States	Redmond	47.674	-122.1215

1 2 3 4 5 6 7 8 9 10 ...

IP tracking and site visit monitoring

  - **Traffic Geocaching** is a graphical display of traffic on a map as shown below. The display is highly flexible allowing the user to zero down on a particular IP and zoom down or up and change the map type (hybrid, satellite, street view) at the same time. The user also has the ability to set the maximum number of users displayed to enhance the readability of the indicator.



Caution

Please ensure that IPs of the business users are in the ignore list so that it does not appear in the traffic analysis.

CRM Solutions by Nishanth Nicholas

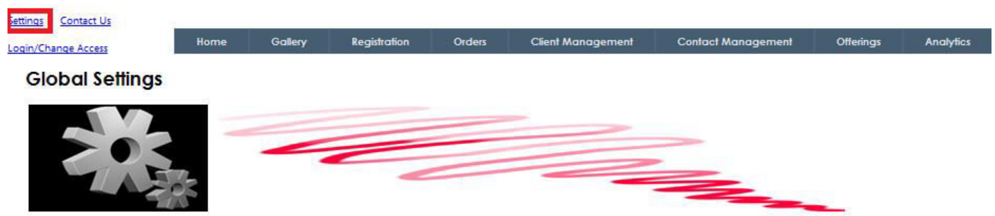
9

Application Administration

This part of the user manual describes the administration and user settings related to the solution. The administrator can make deep seated changes to the web application in terms of User Interface (skins), company description, authentication, taxation, IP ignore lists etc. The details of these are mentioned below.

Due to the sensitive nature of functionality only the Administrator (Admin account) has access to this section. Customers and other 'Admin level' account holders would not be able to login to this area.

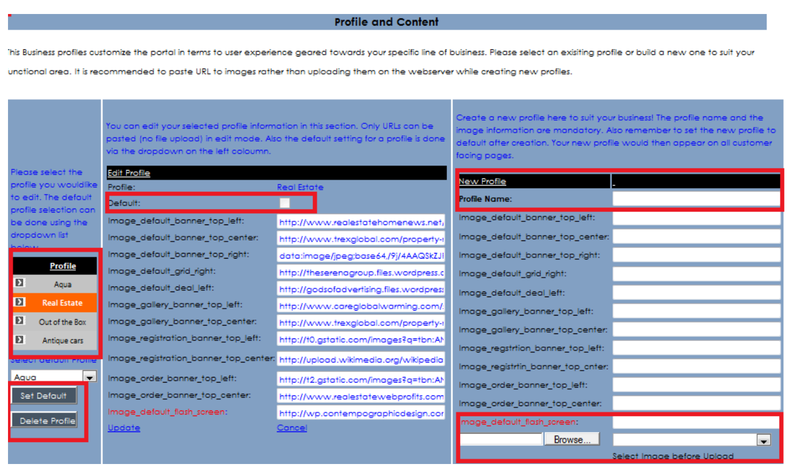
- **Global Settings** helps the Administrator or business owner to make changes on the application settings to customize the solution to individual business needs. This section would let you change look and feel of the customer facing pages of the portal or other parameters like attachment size, gallery images, introductory texts etc. Some of the changes cannot be rolled back.



Only the Administrator (Admin account) has access to the settings section of the application.

Create profiles to suit your business

- **Profile Definitions** help customize the portal in terms to user experience geared towards your specific line of business. Two approaches can be selected in setting a profile for the portal. Please select an existing profile or build a new one to suit your functional area. It is recommended to paste URL to images rather than uploading them on the webserver while creating new profiles.

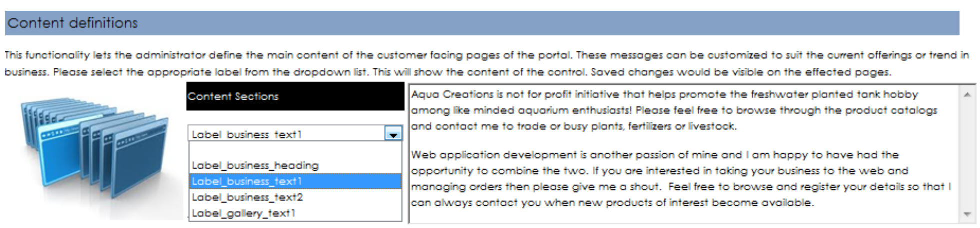


CRM Solutions by Nishanth Nicholas

- **Select Existing Profile** allows the administrator to select an existing profile and set it as the default for the portal.
- **Edit existing profile** the existing profiles can be edited to customize it further or make changes. Only URLs can be pasted (no file upload) in edit mode
- **Add new Profile** helps create a new profile to suit the business needs. The profile name and the image information are mandatory. The solution provides an option to either upload images or use hotlinks (copy paste external image URLs). Remember to set the new profile has to be set to default after creation. Your new profile would then appear on all customer facing pages.
- **Delete Profiles** all existing profiles except the out of the box record can be deleted. Please note that a delete operation cannot be rolled back.

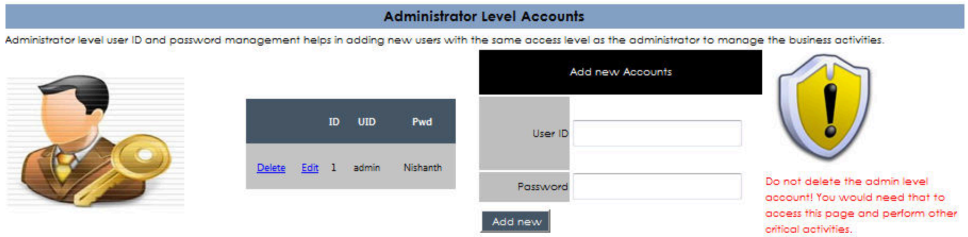
Define the Business content

- **Content Definitions** This functionality lets the administrator define the main content of the customer facing pages of the portal. These messages can be customized to suit the current offerings or trend in business. The appropriate label is selected from the dropdown list to view the content of the control. Saved changes would be visible on the effected pages. The contents can be defined for Business heading, Business text1 and Text2 and Gallery Text.



How to add more business partners or employees

- **Admin Level Accounts** this feature provides the administrator with exclusive rights to setup Admin level accounts. These accounts have a high level of empowerments and can access all areas of the portal except the 'Settings page'. Typically these account owners are partners or other employees of the business. This section allows the addition, deletion and editing of these accounts. Please remember to not delete the core 'admin' account. That is required to log back in to the settings page!

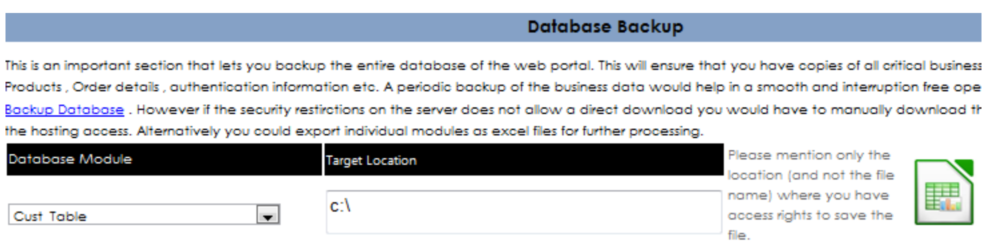


Caution

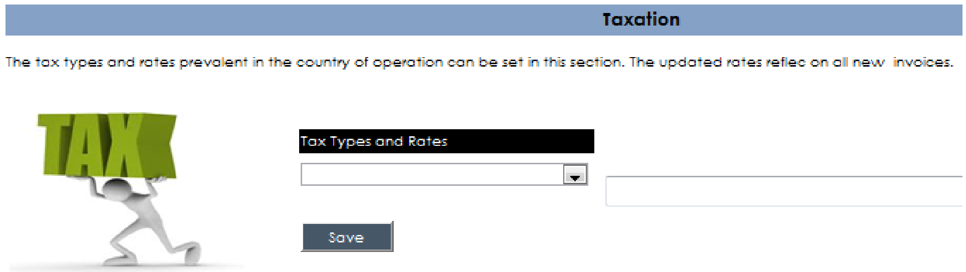
The core Admin account should not be deleted. That is required to access the settings page!

Backup all Business data

- **Database Backup** This is an important function that the entire database of the web portal. This will ensure that all critical business information like customer data, Products, Order details, authentication information etc. are backed up. A periodic backup of the business data would help in a smooth and interruption free operation. However if the security restrictions on the server does not allow a direct download then a manual download of the database can be done from the webserver using the hosting access. Alternatively individual modules can be exported as excel files for further processing.

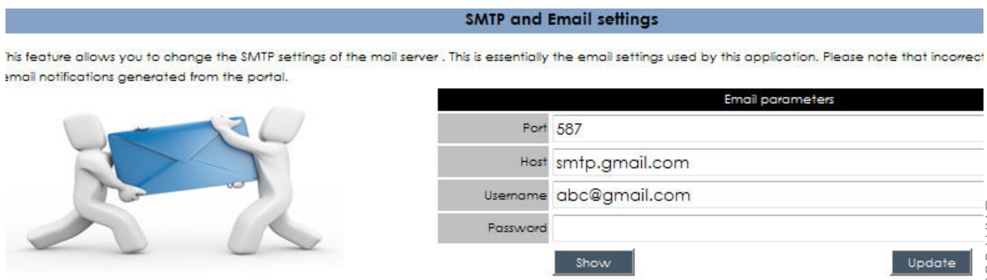


- **Taxation** the solution allows upto two tax types and rates to be set related to the country of operation. The updated rates reflect on all new invoices.



- **Email settings** the solution provides a very convenient interface to change the SMTP settings of the mail server. This is essentially the email settings used by this application. Please note that incorrect settings will impact all email notifications generated from the portal.

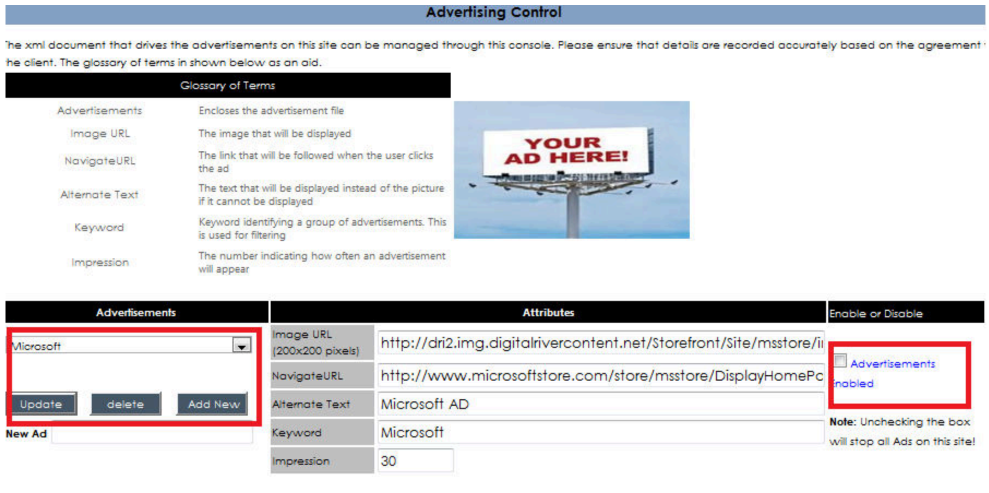
Manage mail settings



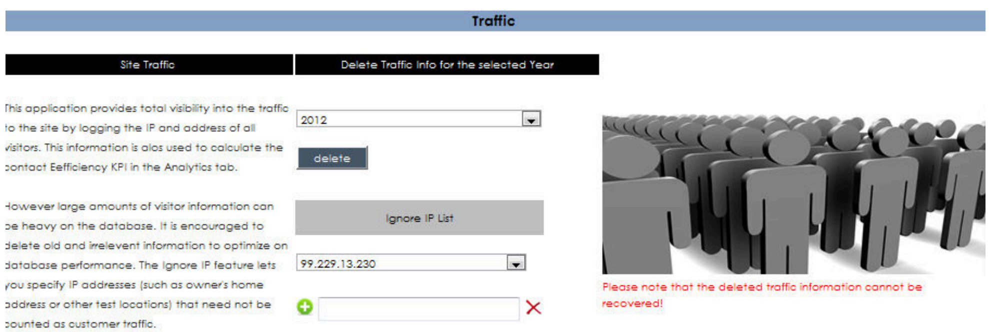
- **Advertisements** the portal enables advertisements to be placed on the customer facing pages of the solution. The ‘Advertisements Enabled’ box should be checked for Ads to be displayed on the page. Further the xml document that drives the advertisements on this site can be managed through this console. Please ensure that details are recorded accurately based on the agreement with the client. The glossary of terms in shown below as an aid.

Add commercial advertisements to the site

Glossary of Terms	
Advertisements	Encloses the advertisement file
Image URL	The image that will be displayed
NavigateURL	The link that will be followed when the user clicks the ad
Alternate Text	The text that will be displayed instead of the picture if it cannot be displayed
Impression	The number indicating how often an advertisement will appear



- **Traffic Monitoring** the solution provides total visibility into the traffic to the site by logging the IP and address of all visitors. This information is also used to calculate the contact Efficiency KPI in the Analytics tab.



Rules for Traffic monitoring

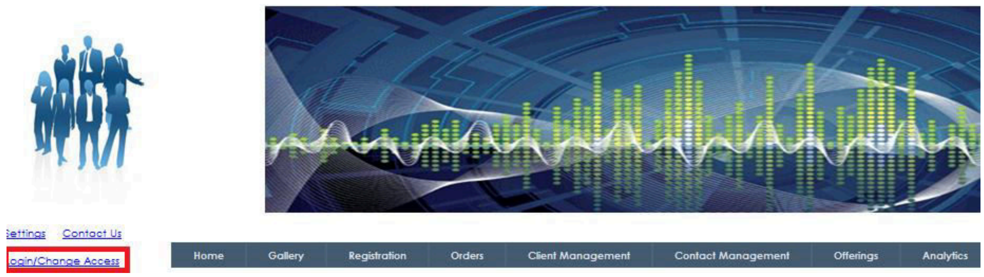
- **Database Purge** large amounts of visitor information can be heavy on the database. It is encouraged to delete old and irrelevant information to optimize on database performance. Please note that deleted information cannot be recovered!
- **IP ignore list** The Ignore IP feature lets the administrator specify IP addresses (such as owner's home address or other test locations) that need not be counted as customer traffic.

10

Authentication

CRM Solutions by Nishanth Nicholas

- **User account and Security** helps Authentication and security of the transactions is a key component of the solution wherein certain parts of the portal are accessible only by valid and authenticated user groups. The solution follows a role based access control mechanism as described below.

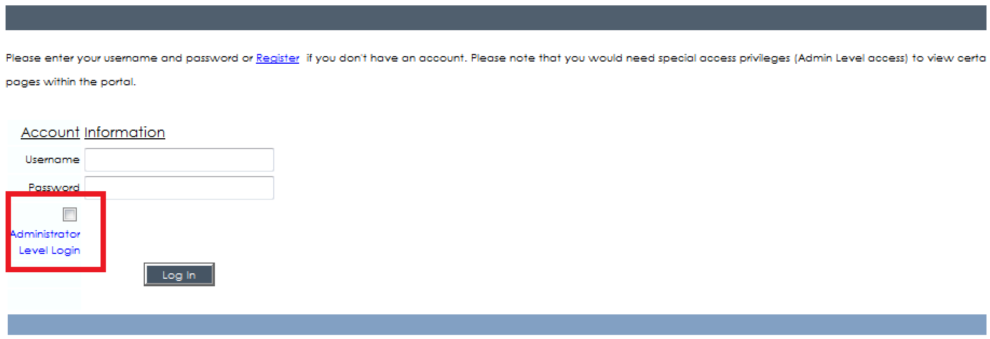


User account types

- **User accounts** there are three types of user accounts used by the solution.
    - **Customer accounts** are created by the users/customers during the registration process. Please note that this is an optional step. However customers would not be able to make secure online transactions without have an online login user ID. Administrative parts of the protal cannot be accessed by thse user groups.
    - **Admin level accounts** these accounts have a high level of authority on the portal actions and are only one below the core admin account. These accounts are created by the core 'admin' account through the 'settings' tab. These account holders have access to all aspects of the portal except the 'settings' area.
    - **Admin account** is the highest level of authority on the portal and is usually owned by the business owner or one authorized individual. There can be only one 'admin' account which has access to the complete portal including the 'settings' tab which controls the core functionality of the solution.

- **Log In and Log Out** is supported by a simple straight forward interface which is common for all user types. This page can be accessible by clicking on the link as shown above in this chapter. Users are also automatically redirected here if they have tried to visit an unauthorized part of the portal. There is no user account lockout feature currently built in the solution.

Log In/ Log Out



Authenticate registered customers or Admin accounts

- **Customer or Admin (level)** please ensure that the 'Administrator Level Login' checkbox (shown above) is checked if an Admin login is being attempted.

Caution

Do not forget to check the 'Administrator Level Login' checkbox when an admin (level) login is made

- **Logout** button would logout the current user and clear the session. This can be used for fast user switching. The page would have to be refreshed for the new user settings to be reflected on the portal.

11

Miscellaneous Information

- **Mobility** The solution uses adaptive rendering, customization and extensibility features to be used effectively on a mobile device with a large form factor e.g. Tablets. The solution does not use JavaScript without alternative or other libraries that are not mobile friendly. Though flash is used in one instance there is an alternate approach of the browser does not support the flash plugin.

- **Core technology** this client management system is a full-fledged web application developed using the Microsoft Asp.net on the 4.0 .Net framework. The database used out of the box is Microsoft Access 2010 which is designed to cost and economical. The database supports up to 255 concurrent users. However should the need arise the database can be upgraded to any commercial RDBMS like SQL server or Oracle.

- **Contact Us** The solution provides a 'Contact Us' function allowing visitors or customers without any registration to freely communicate with the business.

Should you require any more information please feel free to contact the author through the web domain www.NishanthNicholas.com.