



Technologies

Imagine IT





SPG CRM *Presentation*





MIS





spgerp.in/Home/WelcomePage#

Apps Shani Episode 1 telec New Tab

Admin

(Balance : July) 476,500.00

2

588

Ranks List

FY Setting

Rajiv

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 Automotive 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.



ec New tab

(Balance : July) 476,500.00

2

588


Ranks List ▾

FY Setting ▾

 Rajiv ▾



 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 VISTI DETAILS

 Daily Visti Details Of Ankit Singh 7/14/2017

Pendin 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 70

 Daily Visti Details Of Sameer malik 7/13/2017

Go to Settings to activate Windows.

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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

Add New

Total Record

56

Export

Daily Visit Reports Details

Page 1

Please Select






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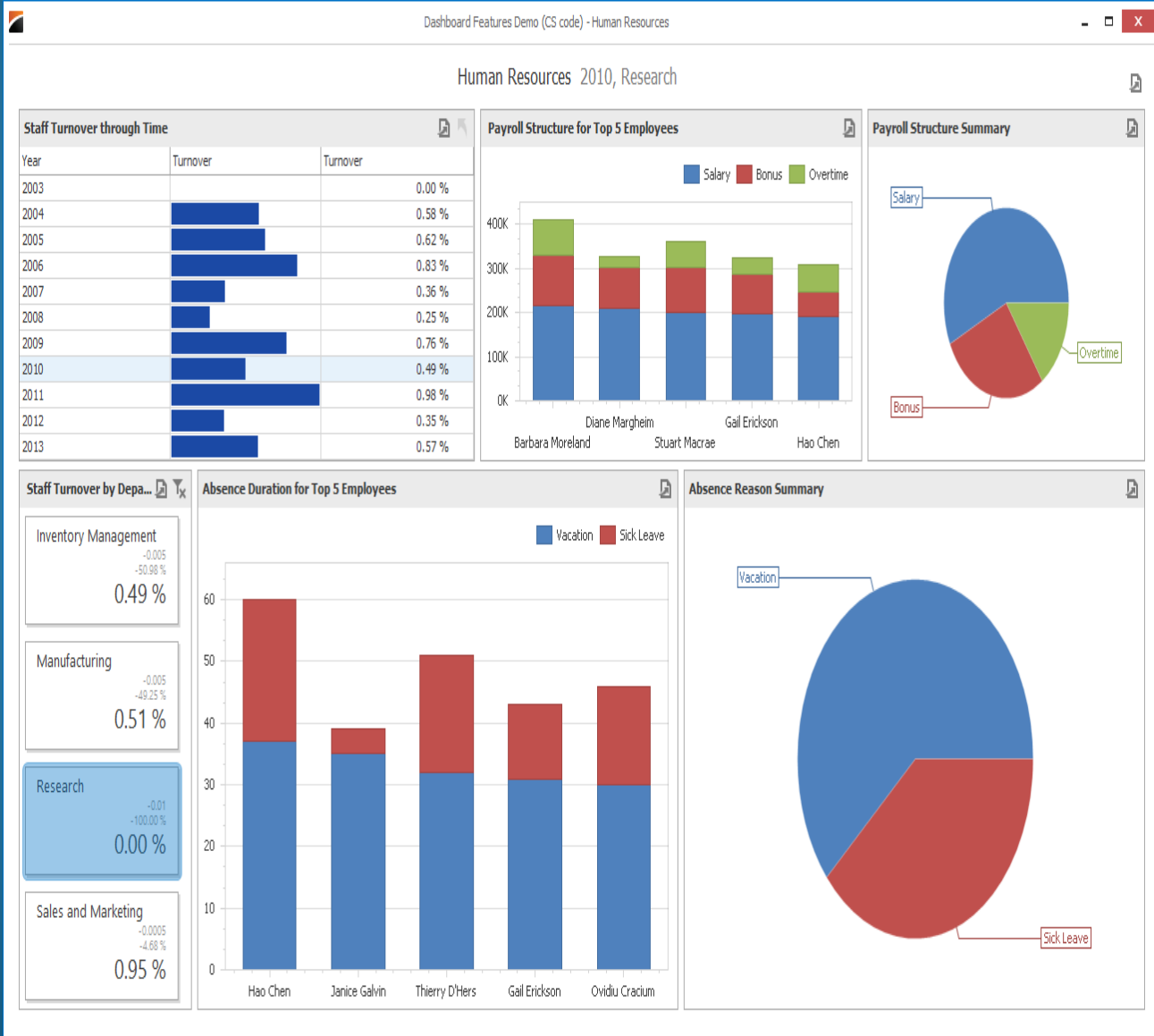
Serial	Employee	Image	Date	Customer Name	Travel Km	Accompanied By	Remarks
1	Amit Singh		7/13/2017	LodeStar	0	Amit	Performa Invoice Update
2	Rajan Gupta		7/13/2017	CA Anil Maheshwari	70	Rajan	Meeting With CA Anil Maheshwari with Ashu sharma
3	Sameer mallik		7/13/2017	GST Software	NA	Ambika Mam	Member 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

Go to Settings to activate Windows.



Dash Board







Active Incident Dashboard

Status



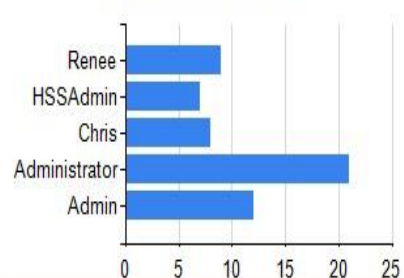
■ CHECK SLA
 ■ Pending
 ■ Suspended
 ■ Open

Aging



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

Top 5 Receivers by Volume

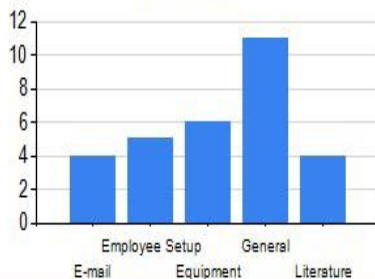


Priority

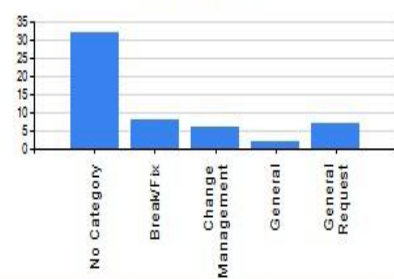


■ 1
 ■ 2
 ■ 3
 ■ 4
 ■ 5

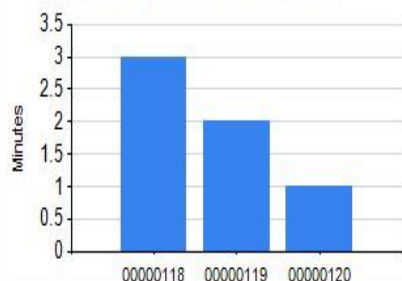
Top 5 Call Types



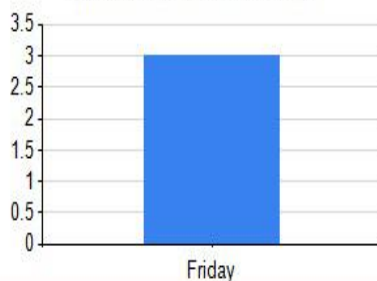
Top 5 Categories



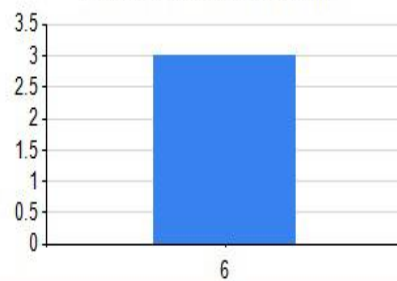
Today's Top 5 Oldest Active Priority 1's



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

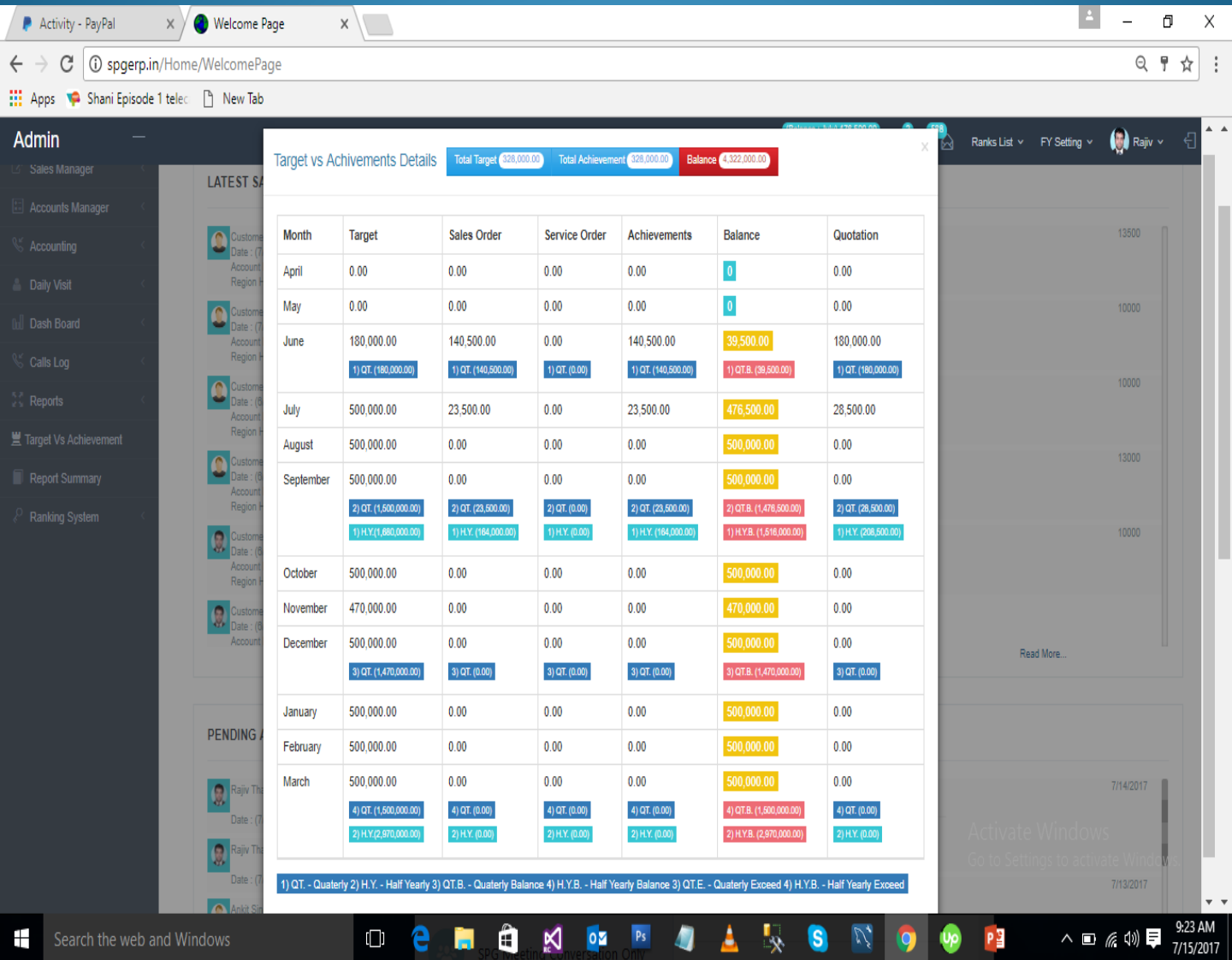
10.17. Closed Call Details





Target Vs. Achievement







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





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