SALES CRM – ENQUIRY & FOLLOW-UP MANAGEMENT REQUIREMENT

1. Enquiry Form

The Sales Executive must create an enquiry by filling in the following fields:

- Serial No (Auto Generated)
- Month
- Customer Name
- Location
- Segment
- Mobile Number
- Quotation Number
- Product Code
- Executive Name
- Follow-Up Date
- Status (Dropdown)
- Hot
- Warm
- Cold
- Gain
- Lost
- Source (Dropdown)
- Justdial
- IndiaMART
- Cold Calling
- Referrals
- Dealers
- Freelancers

- Remarks

- Follow-Up Management

- When a Sales Executive logs into the application, the system should automatically display all customers whose Follow-Up Date is equal to the current date.

- The Sales Executive must update the follow-up status and remarks after contacting the customer.

- The system should maintain a history of all follow-up activities for each customer.

- Escalation to Sales Manager

- If a Sales Executive fails to complete the follow-up for a customer on the scheduled date, the follow-up remains pending.

- If the Sales Executive has not completed follow-ups for 3 or more customers, those pending customer records should automatically appear in the Sales Manager dashboard.
- The Sales Manager should be able to:
- View pending follow-ups.
- Reassign the customer to another executive if required.
- Add remarks and next action items.
- Monitor overdue follow-ups.
- Dashboard Requirements

Sales Executive Dashboard:

- Today's Follow-Ups
- Pending Follow-Ups
- Hot Leads
- Won/Gain Leads
- Lost Leads

Sales Manager Dashboard:

- Team Follow-Up Summary
- Overdue Follow-Ups
- Escalated Customers
- Lead Status Report
- Executive-wise Performance Report