**SALES-CRM SCRIPT**

**Overview :**

Sales &CRM is a fully functional CRM & sales system. Empower your sales department with a complete CRM & Sales solution that they can used to boost sales dramatically. It helps you record leads , opportunities, add new customers, register sales and create invoices. The whole sale process simplified in a simple modern light-weight system that will change how you do business. Most if not all systems out there are using the SAAS model or were built using a complicated script that will take you a while to understand , we built Sales & CRM using php codeigniter. This means that customizing the software to your needs will be easier than any other system out there. We also implemented the pricelist system so you can add discounts for certain customers within a certain period of time. Sales & CRM also contain a simple email application to receive and send emails from within this software. We aim to make your whole sales process easier and smoother.

**Features and Functionalities:**

We have some best feature for the managing script like,

**Login:**

Login is **role** based login user where admin have all the authority to view the details.

* **Admin login (full authority)**
* **Customer login (specified authority by admin)**
* **Staff login (specified authority by admin)**

**The entire feature to customer and staff is specified by the admin**

**Dashboard:**

Dashboard will give overview of all the **active leads, opportunities, customers ,calls, meeting, Ouotations , sales orders , emails, contracts**. It will give **invoicing details** (open invoices, overdue invoices , paid invoices, collection amount). They some other features in dashboard

* Sales statistics
* Events
* Salesteams performance
* Leads(open leads)
* Opportunities (open opportunities )
* Calls Log (open call log)
* Contracts (open contracts)
* Quotations (open quotations)
* Invoices (open invoices)

**Sales Team:**

Sales team management is easy to manage **invoice target, forcast ,actual invoice**. Administrator can create new sales team to manage their invoice by simple form submission. **Leads :**

 Leads are one of the important menus in the menu bar it will give the list of leads. This menu is under the Inventory, where administrator can also add the new leads by simple form submission.

**Opportunities :**

Opportunities is used to track all the customers opportunities like **action date ,action, stages, expected revenue, probability ,sales teams**. With the edit option the admin can view the opportunities has been expired or not. Administrator can also manage the oppotunites.

**Customers:**

Give the list of customers and contact persons information like **company, contact persons, phone, email, register time** and option to download the customer image. Administrator ,staff can also manage the customers details.

**Logged calls:**

Administrator can manage the call summary and responsible person details.

**Meeting :**

Meeting schedules and timing are managed by administrator and staffs.

**Product:**

 Administrator can manage the list of product details and categories. with the edit option the admin can view the category, status, product type, and quantity available on the product.

**Quotations:**

Legally binding agreement to deliver specific products or a selection of a certain amount of products in a specified timeframe at a pre-defined price. A quotation has a validity period. Within the validity period, the customer has the option of placing an order within the agreed conditions with reference to the quotation, or to cancel a contract. Admin can Create, modify, and delete project quotation templates.

**Sales order:**

 Sales order is a approval process for price changes in sales order. It is generated when a buyer communicates that he wants to purchase a product. Administrator can create , modify , and remove sales order.

**Invoices :**

 Invoices provide you with vital information about your company's financial history. Admin can manage the received invoice payments. With the edit option admin can view the invoice number , customer, due date, balance and status of invoice. Here is some feature in the invoices.

* Open invoices
* Overdue invoices
* Paid invoices
* Collection amount
* Receive payment
* Taxes
* Invoice payment log

**Pricelist, Contracts:**

 Admin can manage the price list status , pricelist version. Admin can create the price list which is active or not. pricelist versions are added for a specific item list.

 Contract management for scheduled releases of order quantities over a specific period. Admin can view the expired status of contract.

**Staff :**

 Admin can manage the active staff details. With the edit option admin can create , update , and delete.

**General settings**

* Compose mail
* Site logo, Site name, Site email
* Upload setting
* Sales tax
* Invoice
* Payment terms
* Login
* Email
* Remainder
* Titles, priorities, tags

**Account Setting :**

* Profile
* Change password