

Current Period
1-4-2011 to 31-3-2012

Current Date
Friday, 1 Apr, 2011

List of Selected Companies

Name of Company

Date of Last Entry

Tally Partner - CRM

1-Apr-2011

Tally CRM

Gateway of Tally

Masters

- Accounts Info.
- Inventory Info.
- QuicK Setup

Transactions

- Accounting Vouchers
- InvenTory Vouchers

Utilities

- ImpOrt of Data
- BaNking

Reports

- Balance Sheet
- Profit & Loss A/c
- Stock Summary
- Ratio Analysis

Display

Quit

CRM

F1: Select Cmp

F1: Shut Cmp

F2: Date

F2: Period

F3: Company

F3: Cmp Info

F4: Connect

F4: Disconnect

F11: Features

F12: Configure

Product	Version	License	Configuration	Calculator
Tally POWER OF SIMPLICITY Tally.ERP 9	Series A Release 3.2 Edition Users	Latest Latest Silver ONE	Educational Mode Stat 144 1 TDL(s) loaded Proxy ODBC Server on Port 9000	Latest 19 Failed None 1>

Gateway of Tally Ctrl + M

Current Period: 1-4-2011 to 31-3-2012
 Current Date: Friday, 1 Apr, 2011

List of Selected Companies

Name of Company	Date of Last Entry
Tally Partner - CRM	1-Apr-2011

Gateway of Tally ...

TALLY CRM

Bulk SMS

Service Call

Quit

→ Tally SMS (points to Bulk SMS)

→ Tally CRM (points to Service Call)

Product	Version	License	Configuration	Calculator
 POWER OF SIMPLICITY Tally.ERP 9	Series A Release 3.2 Edition Users	Latest Latest Silver ONE	Educational Mode Stat 144 1 TDL(s) loaded Proxy ODBC Server on Port 9000	Latest 19 Failed None

Module - 1

Tally CRM

Tally CRM Features

- Single Window Operation
- AMC / ASC Details
- AMC Expiry Report
- Sales Leads details
- Leads follow ups
- Incoming call register
- Customer complaint register
- Customer Complaint Status Report
- Details of Support Executive
- E mail – AMC Expiry details
- Paid / unpaid support details
- Customer Service History
- SMS Confirmation for complaint Reg.

Service Call Tally Partner - CRM Ctrl + M

Customer Name : Telephone: Mobile :

Contact Person : Address :

Customer Contact Details

Outstanding (If Any) : AMC Rate : Revenue (F.Y) :

Expiry Date : Total Visit : Visit Given : Balance Visit : 0

Last Service Details

Customer AMC details , Outstanding s, Onsite Visits,

Date : Time : Remarks :

Executive Name : Paid/Unpaid:

Problem Reported :

Customer's Last Service Details

Call Booking Details

Date : 1-Apr-2011 Time : 11:15 Payment :

Problem Reported :

Customer Call / Booking details

Lead Details

Customer Name : Lead for : Ph : E-mail :

New Sales Leads details

- 2: Lead Pending
- 3: Call ID SMS
- 4: Lead Register
- 5: Call Register
- 6: ExpiryList
- 7: AMC Master

Service Call Tally Partner - CRM Ctrl + M

Customer Name : [Redacted] Telephone: [] Mobile : []
 Contact Person : [] Address : []

Outstanding (If Any) : [] AMC Rate : [] Revenue (F.Y) : []
 Expiry Date : [] Total Visit : [] Visit Given : [] Balance Visit : 0

Last Service Details

Date : [] Time : [] Remarks : []
 Executive Name : [] Paid/Unpaid: []
 Problem Reported : []

Call Booking Details

Date : 1-Apr-2011 Time : 11:15 Payment : []
 Problem Reported : []

Lead Details

Customer Name : [] Lead for : [] Ph : [] E-mail : []

Q: Quit

- 1: Pending Call
- 2: Lead Pending
- 3: Call ID SMS
- 4: Lead Register
- 5: Call Register
- 6: ExpiryList
- 7: AMC Master



AMC List	
Scheme Name	Visit No
1000	5
2000	8
3000	12
4000	15
5000	18

Customer Name:

Contact Person:

Mobile:

Revenue (FY):

Visit Given: Balance Visit:

Remarks:

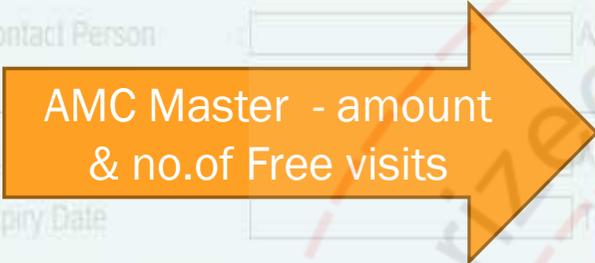
Payment:

Date: Executive Name:

Problem Reported:

Date: Problem Reported:

Customer Name: Lead for: E-mail:



Tally ERP 9
 Customizations by GLOWIPS - Delhi - NCR - India CRM Advanced Module in Tally ERP-9 Official Tally Partners - ERP Developers

P: Print E: Export M: E-Mail O: Upload S: Shop G: Language K: Keyboard K: Control Centre H: Support Centre H: Help F3: Company F3: New Cmp F10: Edit Sort

Ledger Alteration Tally Partner - CRM Ctrl + M

Name : Customer 1 Total Op. Bal.
 (alias) :

Under : Sundry Debtors (Current Assets)
 Maintain balances bill-by-bill ? Yes
 Default Credit Period :
 Inventory values are affected ? No
 Cost centres are applicable ? No

Mailing Details
 Name : Customer 1
 Address : Payyapilly Bldg High Road Aluva 23
 State : Kerala
 PIN Code : 683103
 Contact Person : Mr. Vinod Kumar
 Telephone No. : 2447163
 Mobile No. : 9867456534
 Fax No. :
 E-Mail : suthoash@rediffmail.com

Tax Information
 PAN / IT No. :
 Sales Tax No. :
 CST No. :
 AMC : [Redacted]

AMC Master Aggr Coll. Not Applicable

1000	5	1,000.00
2000	8	2,000.00

... 1 more
 ... 3 more ...

Q: Quit A: Accept D: Delete Ctrl + M

Tally MAIN --> Gateway of Tally --> Accounts Info. --> Ledgers --> Ledger Alteration (c) Tally Solutions Pvt. Ltd., 1988-20 Tue, 29 Nov, 2011 21:08:58

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AMC Setting in Ledger

Option to set AMC master in Customer Ledger Creation

P: Print E: Export M: E-Mail O: Upload S: Shop G: Language K: Keyboard K: Control Centre H: Support Centre H: Help

Ledger Alteration Tally Partner - CRM Ctrl + M

Name : Customer 1
(alias) :

Total Op. Bal.

Under : Sundry Debtors
(Current Assets)
Maintain balances bill-by-bill ? Yes
Default Credit Period :
Inventory values are affected ? No
Cost centres are applicable ? No

Mailing Details
Name : Customer 1
Address : Payyapilly Bldg
High Road Aluva
23
State : Kerala
PIN Code : 683103
Contact Person : Mr. Vinod Kumar
Telephone No. : 2447163
Mobile No. : 9867456534
Fax No. :
E-Mail : suthesh@rediffmail.com

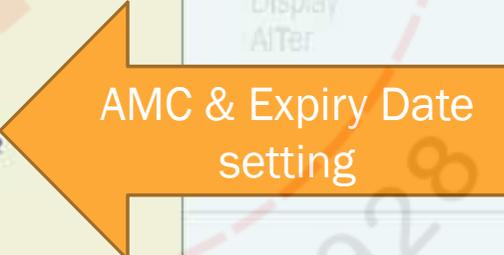
Tax Information
PAN / IT No. :
Sales Tax No. :
CST No. :
AMC : 1000
Expiry Date : 31-3-2012

Gateway of Tally
Accounts Info

Ledgers

Single Ledger
Create
Display
Alter

Multiple Ledgers
Create
Display
Alter



AMC & Expiry Date setting

Opening Balance (on 1-Apr-2011) :

Q: Quit A: Accept D: Delete

Service Call Tally Partner - CRM Ctrl + M 2: Lead Pending

Customer Name : [Redacted] Telephone: [] Mobile : []
Contact Person : [] Address : []

Outstanding (If Any) : [] AMC Rate : [] Revenue (F.Y) : []
Expiry Date : [] Total Visit : [] Visit Given : [] Balance Visit : 0

Last Service Details

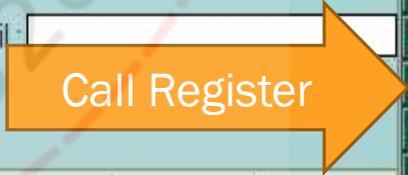
Date : [] Time : [] Remarks : []
Executive Name : [] Paid/Unpaid: []
Problem Reported : []

Call Booking Details

Date : 1-Apr-2011 Time : 11:15 Payment : []
Problem Reported : []

Lead Details

Customer Name : [] Lead for : [] Ph : [] E-mail : []



- 1: Pending Call
- 2: Lead Pending
- 3: Call ID SMS
- 4: Lead Register
- 5: Call Register
- 6: ExpiryList
- 7: AMC Master

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P: Print E: Export M: E-Mail O: Upload S: Shop G: Language K: Keyboard K: Control Centre H: Support Centre H: Help F2: Period

ServiceCallRegister Tally Partner - CRM

Support register form 1-Apr-2011 to 1-Apr-2011

Date	Time	Customer Name	ID	Problem Reported		
1-4-2011	13:55	Customer 1	10020	Tally Reinstall	Paid	Staff 1
				<i>Solution :- Tally Reinstalled</i>		
1-4-2011	13:57	Customer 2	10021	Tally Sync Configuration	Paid	Staff4
				<i>Solution :- Sync Done</i>		
1-4-2011	13:57	Customer 3	10022	Payroll Training	Paid	Staff3
				<i>Solution :- Training Given</i>		
1-4-2011	14:25	Customer 2	10023	tally training	Un Paid	

1 more ... ↓

Q: Quit Ctrl + N

Tally MAIN --> Gateway of Tally --> TALLY CRM --> Service Ca Pvt. Ltd., 1988-20 Thu, 1 Dec, 2011 11:22:42

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Customer wise Filtration

Paid / Unpaid Filtration

Support Pending Report

Call / Support Register :

- Customer Wise Filtration
- Paid / unpaid Customer details

Support register form 1-Apr-2011 to 1-Apr-2011 Customer Name : All (Paid / Unpaid)

Date	Time	Customer Name	Problem Reported	Payment	Executive
14-2011	13:55	Customer 1	Tally Reinstall	Paid	Star
14-2011	13:57	Customer 2	Tally Sync Configuration	Paid	Star
14-2011	13:57	Customer 3	Payroll Training	Un Paid	Star
14-2011	14:25	Customer 2	tally training	Un Paid	Star

Paid / Unpaid Customer Filtration



PaymentDet

- Paid
- Un Paid

Support register form 1-Apr-2011 to 1-Apr-2011 Customer Name : All (Paid)

Date	Time	Customer Name	ID	Problem Reported	Payment	Executive
1-4-2011	13:55	Customer 1	10020	Tally Reinstall	Paid	Staff 1
				<i>Solution :- Tally Reinstalled</i>		
1-4-2011	13:57	Customer 2	10021	Tally Sync Configuration	Paid	Staff4
				<i>Solution :- Sync Done</i>		
1-4-2011	13:57	Customer 3	10022	Payroll Training	Paid	Staff3
				<i>Solution :- Training Given</i>		

Paid Customer's Report

Date Time	Customer Name	ID	Problem Reported	Payment	Executive
14-2011 14:25	Customer 2	10023	tally training	Un Paid	

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Unpaid Customer's Report

P: Print | E: Export | M: E-Mail | O: Upload | S: Shop

Not Solved / Support Pending Report

Service Call

Customer Name : [Redacted] Telephone : [] Mobile : []
Contact Person : [] Address : []

Outstanding (If Any) : [] AMC Rate : [] Revenue (F.Y) : []
Expiry Date : [] Total Visit : [] Visit Given : [] Balance Visit : 0

Last Service Details

Date : [] Time : [] Remarks : []
Executive Name : [] Paid/Unpaid : []
Problem Reported : []

Call Booking Details

Date : 1-Apr-2011 Time : 22:45 Payment : []
Problem Reported : []

Lead Details

Customer Name : [] Lead for : [] Ph : [] E-mail : []

Q: Quit

- 1: Pending Call
- 2: Lead Pending
- 3: Call ID SMS
- 4: Lead Register
- 5: Call Register
- 6: ExpiryList
- 7: AMC Master

Service Call Tally Partner - CRM Ctrl + M

Customer Name : [Redacted] Telephone : [] Mobile : []
Contact Person : [] Address : []

Outstanding (If Any) : [] AMC Rate : [] Revenue (F.Y) : []
Expiry Date : [] Total Visit : [] Visit Given : [] Balance Visit : 0

Last Service Details

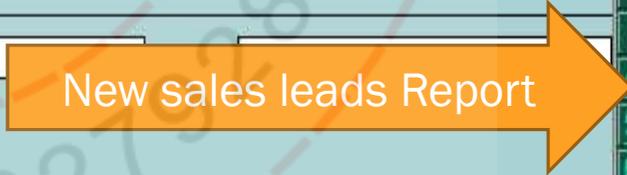
Date : [] Time : [] Remarks : []
Executive Name : [] Paid/Unpaid : []
Problem Reported : []

Call Booking Details

Date : 1-Apr-2011 Time : 22:52 Payment : []
Problem Reported : []

Lead Details

Customer Name : [] Lead for : [] Ph : []



- 1: Pending Call
- 2: Lead Pending
- 3: Call ID SMS
- 4: Lead Register
- 5: Call Register
- 6: ExpiryList
- 7: AMC Master

Support register form 1-Apr-2011 to 1-Apr-2011 Lead Register

Customer Name	: New Customer 1	Lead for	: Tally.ERP9 Silver	Ph	: 9867564532	E-mail	: Info@gmail.Com
Customer Name	: New Customer 2	Lead for	: Tally.ERP9 Gold	Ph	: 9898787867	E-mail	: Contact@ymail.Com
Customer Name	: New Student 1	Lead for	: Tally Certified Course	Ph	: 9889786745	E-mail	: Info@abc.Com
Customer Name	: New Customer 3	Lead for	: Tally.ERP9 International Edition	Ph	: 9867564532	E-mail	: Sales@sdf.Com

You can make follow ups by entering the below lead

New Leads Report