# **NJ CRM** User Manual Version 1.0





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Fundz Network

## How to access NJ CRM ?

#### After accessing you Partner Desk go to the Tab Marketing > NJ CRM > Visit Your NJ CRM Desk

manage them i.e Accounts, Groups & check updated request status. View Interactive Demo	vie Vie
Marketing         Printshop       Leads       Downloads       SMS       NJ CRM         Image: State of the	Subscription Ser Status Agen Registration Mai offe View
Rewards and Schemes          RAP       Brokerage         Market and Schemes       Know about the Sales Schemes & reward	Process/Docum PAN & KYC



## Home Page

Once you enter the NJ CRM, the home page displays a *Calendar* of the current month, which apart from a calender also functions as a *Integrated business diary* 

	J Fundz Net						
1.1							13th July, 3
	Home	Leads ♥	Cli	ents▼ Ac	tivity ▼	Interactions V	Tasks ♥
					-		
	July 2011 >>					View for	Select
	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	,		,			I[4] T[1] A[1]	I[1] T[1]
						1	2
		I[3] T[3]	I[2] T[4]	i[8]	I[2]	I[14]	-
	3	4	5	6	7	8	9
		1[5]	1[3]	I[1] T[1] A[1] F[1] Ap[1]			
	10	11	12	13	14	15	16
	17	18	19	20	21	22	23
	24	25	26	27	28	29	30
	31						
				Add Interaction Add	d Task		
	Previous				JIASK		Nex1>>
l=int	teractions T = Tas	s A= Activities F= Follo	w Ups Ap= Appoin	tments			
3/07/1	11						
	tions						
terac	Sr.No. Agenda Name Type		Mode	Nature	Participa	ants Interaction St	atus Interaction B
	Portfolio review with		In Person	Relationship Building		1 Scheduled	Self
i <b>r.No</b> . 1		Mr	In Person	Relationship Building		1 Scheduled	Self
r.No.	Portfolio review with	Mr	In Person Time tak				
r.No. 1 asks	Portfolio review with Pratik Malpani Title	<u>Mr.</u> 1 to 1	Time tak		e Remark take 2 cheques	ks Status	Self Assigned to Self
ir.No. 1 asks ir.No. 1	Portfolio review with Pratik Malpani Title SIP forms	Mr. 1 to 1 Task Nature	Time tak	en Completion Date	e Remark	cs Status	Assigned to
r.No. 1 asks r.No. 1 ctiviti	Portfolio review with Pratik Malpani Title SIP forms ies	Mr. 1 to 1 Task Nature Data / Form collection	Time tak	en Completion Date	e Remari take 2 cheques each	of 5000 Not Started	Assigned to Self
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r.No. 1 asks r.No. 1 ctiviti r.No. 1	Portfolio review with Pratik Malpani Title SIP forms ies Origin	Mr. 1 to 1 Task Nature Data / Form collection Date(s) 13-07-2011	Time tak	en Completion Data - ty Type Product NG REALTY - Realty	e Remari take 2 cheques each	ks Status of 5000 Not Started Venue Piplod	Assigned to Self Assigned to -



## How to view & use the Calendar ?

The calendar dates store a summary of the day's scheduled activities, appointments, interactions and other tasks (which have been explained in detail later in the document)

13/07/11									
Interac	tions								
Sr.No.	Agenda Name	Туре	Mode	Nature	Participants	Interaction Status	Interaction By		
1	Portfolio review with Mr. Pratik Malpani	1 to 1	In Person	Relationship Building	1	Scheduled	Self		
Tasks									
Sr.No.	Title	Task Nature	Time taken	Completion Date	Remarks	Status	Assigned to		
1	SIP forms	Data / Form collection	-	-	take 2 cheques of 5000 each	Not Started	Self		
Activit	ies			R.					
Sr.No.	Origin	Date(s)	Source / Activity Type	Product - Pr	oduct Agenda	Venue	Assigned to		
1	Self	13-07-2011	CLIENT MEETING	REALTY - Realty		Piplod	-		
Follow	Ups & Appointments								
Sr.No.	Lead Name	Origin	Mobile	Email	Remarks	Lead Status	Assigned to		
1	Gaurav Sharma	Self	9898131313	-	Call @ 5 pm	Follow up	c1advisors		
2	Ritesh Mishra	Self	9875445343	-	-	Appointment	c1advisors		

The listing below the Calendar provides a list of information available on the screen. They are listed under the headings

- 1. Interactions
- 2. Tasks
- 3. Activities
- 4. Follow Ups & Appointments

These provide you with a snapshot of the day's/ week's and month's schedule in one glance. Clicking on a particular date would list down the events of the day.

You can also view the schedule for your employees by using the feature *View For* provided on top of the Calendar. When you select the name of a particular employee the *Calendar* would reload to show the schedule of the employee chosen.



## Leads



Leads form an important part of any Business model. Leads are very important at the initial stages of the business and a crucial part of business mobilization once the business starts off. Plead Managemengt or Prospect Managemenet thus becomes an important resource to manage. Considreing the cost involved for generating Leads these days, it is very much required to properly manage the leads at every stage. The *Leads* section has been divided into four parts -

- 1. Manage Leads
- 2. Import Leads
- 3. Lead Profile
- 4. Lead Report



#### How to make a quick entry of Lead in your NJ CRM ? Leads > Manage Leads > Quick Create Lead

**Quick Create Lead** – This utility allows you make a short entry of any person whom you think of as a prospect or lead, with few compulsory fields as listed in the table below. These details would be saved in NJ CRM for your future use.



No	Caption / Field Name	Description			
1	Lead Name	Name of the person			
2	Lead Date	Date on which you met or identified the person as lead/prospect			
3	Mobile	For saving the contact number of the person			
4	Activity / Source ~ Activity Type	For identifying the source or activity from where that lead came to you.			
5	The remaining fields – <i>E Mail, Address, Product, Product Agenda</i> are for additional information that you might come across when you meet the prospect / lead and which you can save along with his/her contact details.				
6	The Quick Create form can be opened & closed using the + /- button on the right side of the form ( marked by number 2 in the image )				



Search Lead This smart tool lets you search a lead lying in the database of leads entered by you/ your team.

No	Caption / Field Name	Description
1	Lead Name	Type in the name of the person you want to search for. As you type in the first three alphabets of the Lead Name, there would be system generated list of leads whose name start with those alphabets along with their mobile number & current status for the ease of your selection.
2	Activity / Source ~ Activity Type	This additional selection would helps to pinpoint the leads directly incase you know the source from which it was generated.
3	Search	Click on this for searching the lead name which are searching.
3	Reset	Click on this for resetting the name you entered for searching.
5	Go to Profile	Click on this for to go to the detailed information page of the Lead for which you entered the name. ( Lead Profile )

*Lead List* For your convenience, there is a default list of 10 leads which were added to recently added by you. The list provides a snapshot of the details of your prospect/ lead.

No	Caption / Field Name	Description
1	Display Rows	In reports and lists, the system displays 10 last entries by default. You can adjust the number of entries you want to see by choosing the options available 10,25,50,75 or 100.
2	Tick	These are check boxes for selecting a particular lead or a group of leads and perform action like Delete or Export.
3	Origin	Helps you to differentiate the leads forwarded ny NJ from its activities and the leads which were generated by you/ your team. The leads forwarded by NJ would show the origin as NJ
4	Lead Name	Name of the person
5	Mobile	Contact number of the person
6	E Mail	Email id of the lead
7	Source~Activity Type	Source or activity type from where that lead came
8	Product	It shows the product for which preference was shown by the lead. Currently it includes 1. Mutual Fund 2. Insurance 3. Realty
9	Product Agenda	Under the products the prospect might also have shown interest in specific modes like SIP, NFO in Mutual Funds.
10	Lead Date	Date on which you met or identified the person as lead/prospect
11	Lead Status	Shows the current status of the lead. You can also update the lead status from here with updated remarks.
12	Assigned To	Shows the name of the current relationship handler of the lead
13	Interactions	The hyperlink shows the number of communication/ meeting that took place with the lead till date. Clicking on the same would open up a description of all the communication that has took place till date which has been described later



		in the manual.
14	Last Interaction Date	Shows the date on which any kind of communication/ meeting was done with the lead.
15	Interaction By	Shows the name person/ employee who last communicated with the lead
16	Add Interaction Button	Allows user to add interaction to selected Lead(s). Interaction can be created on multiple persons ( Interaction > Add Interaction )
17	Add Task Button	Allows user to add task to selected Lead. Task can be created on single person only( Task > Add Task )
18	Delete Lead(s) Button	Allows user to delete the selected Lead(s)
19	Export Button	Allows you to generate a excel of the leads in your NJ CRM

## How to update Lead Status ?

A very important step of Lead Management is Tracking & Updating the status of the Leads regularly.

Keeping the status updated would allow you and your team to focus on Leads which are prospective Clients and cut short time & resource spent on leads which might not be the prospects you are looking for.

Here we have provided with shortcuts to update the status of your leads on the go, so that you don't have to spend resourceful time searching & updating the status of your leads.

A leads life cycle till he/she becomes your Client passes through various status..

When you first get the Lead its in Open Status. After few intial meetings, Follow ups & Appintments the lead might turn out to be Interested or Not Interested. The Interested Lead needs to be taken care of until he/she finally becomes your Client. To manage all this *Lead Status* can be updated from any of the 3 locations described below...

- 1. Lead > Manage Leads > Leads list
- 2. Lead > Lead Profile > Basic Details
- 3. Leads > Lead Report

Select one of the Status as provided in the selection for *Lead Status* and save the information. The same would be updated in all the related places where Lead Status information is provided for you to acess.



## How to insert Lead data in bulk?

#### Leads >> Import Leads

Import Lead This utility allows you to insert & save a bulk of Leads in one go. All you need to do is convert your excel of data into csv format & upload the same into the NJ CRM as directed below.

					Import Le	ad			=
1	* Activity, i	fany:	Select-		• OR *	Source / Activity Typ	xe : [	Select	•
	Browse	e File :			Browse	2			
				3	Submit	Cancel			
	F	Format for up	oading csv	file (column h	eadings). Plea	ase use this format o	only for u	ploading your da	ata.
	Name*	Mobile*	E Mail	Address	Lead D	ate*(DD/MM/YYYY)		Comments (	lf any )
	Help to cre	ate .CSV File							
					Edit Le	ad			
		Lea	ad Name :	ashi		-		<u></u>	
		L		Ashish N ~ 9 Converted	9999888855~			1	
				Ashish ~ 999 Converted	99996666 ~				

- Step 1 : Creating a csv file from the excel containing data of the leads
- Step 2 : Once csv file has been created and saved, you can go the Import Lead module. Select the Activity or Source / Activity Type from which the leads were originated/ generated.
- Step 3 : Browse the file from the file location and click on submit. The system would ask for validation before finally saving the file into your lead database.

Edit Lead Type in the name of the person you want to search for. As you type in the first three alphabets of the Lead Name, there would be system generated list of leads whose name start with those alphabets along with their mobile number & current status for the ease of your selection.

Next Click on the Go to Profile in the detailed form of the Lead as detailed in next section of Leads >> Lead Profile



#### How to manage, update Lead related information ? Leads > Lead Profile

For the purpose of knowing more about your Leads who are your Prospective Clients, the Lead Profile Utility provides you with capturing, saving, managing Lead related data in Lead Profile wherin one can update all the information in below structure.

The basic objective of keeping this information updated is that it would helpful for you when executing Activities for *Client Acquisition.* Knowing the demographic nature, Product preference, etc of your leads would allow you to focus specifically Leads which have higher chances of getting converted into Clients. Also that activities involve cost and it again its important to have a healty conversion ration of Leads getting converted into Clients.

BASIC DETAILS	Lead Source	Personal Details	Contact Details	Profile Details
	> Activity, if any	> Name	> Add ress	> An nual I ncome (p.a.)
	> Source / Activity Type	> Father's/ Husband Name	> Country	> Family Income (p.a.)
		> Date of Birth	> State	> Home Ownership
		>Gender	> C ity	> Fin ancial Planning Interest
		> Nationality	> Pin/Zip Code	> Existing Life Insurance Cover
	My CRM Group	> Religion	> Fax	> Existing Health Insurance Cover
	> My CRM Groups	> PAN	> Mobile	> Interested Product
	> Add to CRM Group	> Marital Status	> Email	>Comments/Observations
		> An nive rsary Date	> Tel (Off. )	> Lead Status
	Mapped to Contact	> Educational Qualification	>Tel(Res.)	> Location
	> NJG noup	> Occupation		> Assigned To
	> Account Name	> Residential Status		
INTERACTIONS	Recent Interactions			
	> Date		>Agenda Name	
	> Type		> Remarks	
	> Mode		> Interaction Status	
	> Nature		> Interaction By	
TASKS	Recent Tasks			
interte	> Target Date		> Time taken	
	> Taget Date > Task Nature		> Status	
	> Assigned to (Empbyee)		>Completion Date	
	> Title		> Remarks	



#### How to track your Leads related information ? Leads > Lead Report

The Lead Report provides you with all the information saved on your Leads. The report can be used to analyse.

- 1. Leads lying in various status
- 2. Leads with particular product preferences
- 3. Leads of various demographic groups
- 4. Leads and their status, employee wise
- 5. Leads generated/ converted withing specific time period or from specifc source / activity

All this information comes handy when planning activities. You can view the report online or generate a Excel file for the same. The report can be customized by selection of fields from *Customize your Report* where you can select the required fields and view the info.

You can also plan *Interaction* or allocate *Task* by using the plug in feature of **Add Interaction** and **Add Task** after selecting your Invitee List from the report generated.

	Lead Report
Source / Activity Type :	Select All
Activity,if any :	Self, CLIENT MEETING,01-07-2011,Essar           Self, NEWS PAPER ADS,10-06-2011,-           Self, abcdef,04-06-2011 To 05-06-2011,dsf
Lead Origin :	NJ Self Lead Status : Appointment Cold
* Date Selection By :	Lead Created between
* Period :	From 21/07/2011 To 21/07/2011
Assigned To :	Bhavik T-''' Brijesh J
Report On :	Screen Excel
	Customize your Report
Select Report Fields	Total Fields
Lead Source Personal Details Contact Details(for c Profile Details My CRM Group Deta Mapped to Contact Interaction Details	
<b>Note:</b> The Customized re Export the data using Exc	eport would display 15 fields on screen at the max. If you have selected more than that please sel for complete data.
	Run Report Reset



## Clients



The Clients section contains data & information related to your existing clients and has has been divided into three parts. (1) Client Profile, (2) Client Report, (3) My CRM Groups

#### How to search a Group, a specific Client or a customized group information ? Clients > Client Profile

The client data can be viewed as per your requirement in three modes – NJ Groups, Accounts and My CRM Groups

**NJ Groups :** Select the option **NJ Groups** from **View**, and type the name of the group you want to search. The system would auto search and list out all the NJ Group Names starting with the text written by you.

* View : O NJ Groups Accounts My CRM Groups * Search NJ Group : Ashish N Ashish ii iicuuia Ashish ii iicuuia Ashish ii iicuuia										
	List of NJ Groups									
Display	Rows	s: 10 💌						< < Previous	Page 1 Of 4	Next > >
Sr.No.	Tick	NJ Group Name	No. of Accounts	Contac	t Person	Mobile	Email	Total Interactions	Last Interaction Date	Interaction By
1		<u>Ashish</u>	6	N/A		N/A	N/A	0	N/A	N/A
2		Ashish	2	A04461		N/A	N/A	0	N/A	N/A
	Add Interaction Add Task Export									

No	Caption / Field Name	Description
1	NJ Group Name	Shows the group name of your client. Clicking on the name takes you the Group level information. Here you can update the details if required.
2	No. of Accounts	This shows the number of individual accounts mapped to the related Group
3	Contact Person	Displays the contact person of this Group of accounts
4	Mobile	Displays the Mobile number of the contact person of this Group
5	E Mail	Displays the Email ID of the contact person of this Group
6	Total Interactions	The hyperlink shows the number of communication/ meeting that took place with the group till date. Clicking on the same would open up a description of all the communication that has took place till date which has been described later in the manual.
7	Last Interaction Date	Shows the date on which any kind of communication/ meeting was done with the



		group.
8	Interaction By	Shows the name person/ employee who last communicated with the group.
9	Add Interaction Button	Allows user to add interaction to selected group(s). Interaction can be created on multiple groups
10	Add Task Button	Allows user to add task to selected Group. Task can be created on single selection only
11	Export Button	Allows you to generate a excel of the groups in your NJ CRM

Accounts : Select the option Account from View, and type the name of the client you want to search. The system would auto search and list out all the accounts starting with the text written by you.

View: NJ Groups Accounts My CRM Groups     Search Account:      Navin B     Navin B     Navin B     Navin B     Navin B     Navin Complexity     Non Individual										
Display	List of Accounts Display Rows: 10  Page 1 Of 1									
Sr.No.	Tick	Account Name	Mobile	Email	Mapped to NJ Group	CRM Group, If any	Creation Date	Interactions	Last Interaction Date	Interaction By
1		Navin B	N/A	N/A	Navin Salonangam	N/A	28-03-2008	0	N/A	N/A
2		Navin B	N/A	N/A	Manoj ,,	N/A	25-01-2008	0	N/A	N/A
	Add Interaction Add Task Export									

No	Caption / Field Name	Description
1	Account Name	Shows the name of your client. Clicking on the name takes you the Account level information( Client Profile) .Here you can update the details if required.
2	Mobile	Displays the Mobile number of the client
3	E Mail	Displays the Email ID of the client
4	Mapped to NJ Group	This the group name to which the client is mapped with
		This refers to the name of customised group(s) to which the client has been mapped by you. ( CRM group described in section <i>Clients &gt; My CRM Groups</i> )
6	Creation Date	Shows the date on which the account was created for the client and was mapped to your relationship
7	Interactions	The hyperlink shows the number of communication/ meeting that took place with the client till date. Clicking on the same would open up a description of all the communication that has took place till date which has been described later in the manual.
8	Last Interaction Date	Shows the date on which any kind of communication/ meeting was done with the client.
9	Interaction By	Shows the name person/ employee who last communicated with the lead.
10	Add Interaction Button	Allows user to add interaction to selected group(s). Interaction can be created on multiple groups
11	Add Task Button	Allows user to add task to selected Client. Task can be created on single selection only.
12	Export Button	Allows you to generate a excel of the clients in your NJ CRM

My CRM Group : Select the option Account from View, and type the name of the client you want to search. The system would auto search and list out all the the accounts starting with the text written by you.



#### How to manage, update Client related information ? Clients > Client Profile



As the relationship with the client grows, we come to know about facts, product preferences, his family details and other details. We try to be more specific when suggesting him any product or service depending upon his needs, preference, applicability and requirement.

All of these are termed as *Client Profiling* wherein you get to know more and more about your client and which can serve as very effective way of providing service to him and at times in a more customized way.

A simple example would be that if you know the Anniversary date of your client who is married, and send him a customized Greeting or a SMS on that date, it would make him feel more special and the next time you approach him with say, Life Insurance Product he would have that goodwill feeling which you had created by sending a simple SMS. But without knowing the anniversary date or his contact number or the Insurance requirement of his household, there would have been no way of doing these 2 activities.

*Client Profile* offers you with an extensive and structured space to save all such details of your client wherein you can add, update, save and view the details in described structure. Since your Client might be an *Individual* or a *Non Individual* entity, in NJ CRM we have taken care to take relative details of your client.

Individual Clients	Non Individual Clients
Basic Details	Basic Details
Lead Source	Lead Source
Personal Details	Firm Details
Contact Details (for communication)	Authorized Person Details
Profile Details	Contact Details (for communication)
My CRM Group	Profile Details
NJ Group Details	My CRM Group
	NJ Group Details
Additional Details	Additional Details
Family Details	Customer Insights
Children Details	
Contact Person / Guardian / In case of Emergency	
Customer Insights	
Interactions	Interactions
Recent Interactions	Recent Interactions
Tasks	Tasks
Recent Tasks	Recent Tasks



## **Profile information of Individual Clients**

BASIC DETAILS	Lead Source	Personal Details	Contact Details	Profile Details
	>Activity, if any	>Name	> Address	> Wealth Account
	> Source / Activity Type	> Father's/ Husband Name	> Country	Wealth A/C No.
		> Date of Birth	> State	> Non PMS
		> Gender	> City	Trading A/C No.
		> Nationality	> Pin/Zip Code	Demat A/C No.
	My CRM Group	> Religion	> Fax	> PMS
	> My CRM Groups	> PAN	> Mobile	Trading A/C No.
	> Add to CRM Group	> Marital Status	> Email	Demat A/C No.
	- Add to on an oroup	> Anniversary Date	> Tel.(Off.)	>Annual Income(p.a.)
		> Educational Qualification		
			> Tel.(Res.)	> Family Income(p.a)
		> Occupation		> Home Ownership
	NJ Group Details	> Residential Status		> Financial Planning Interest
	> NJ Group			> Existing Life Insurance Cover
	>Assigned To			> Existing Health Insurance Cover
				> Interested Product
				> Comments / Observations
ADDITIONAL	Family Details	Contact Person / Guardia	an /	Customer Insights
DETAILS		In case of Emergency		
	> Spouse Name	> Name		> Industry (belongs to)
	> Spouse Date of Birth > Spouse Occupation	> Designation /Relation > Email		> Company Name, if any > Designation / Role
	> Nationality	> Date of Birth		> No. of 2 Wheelers owned
	> PAN	> Mobile		> Estimated Net-worth (Rs.)
	> No. of Family Members			> No. of Cars owned
	> No. of Dependents			> Risk Category
				> Interest Areas
				> Interest Areas > Permanent Address
				> Permanent Address
	Children Detaile			> Permanent Address > Country
	Children Details			> Permanent Address > Country > State
	>Name			> Permanent Address > Country > State > City
	> Name > Date of Birth			> Permanent Address > Country > State > City > Pin/Zip Code
	>Name			> Permanent Address > Country > State > City
INTERACTIONS	> Name > Date of Birth			> Permanent Address > Country > State > City > Pin/Zip Code
INTERACTIONS	> Name > Date of Birth > Gender Recent Interactions > Date		>Agenda Name	> Permanent Address > Country > State > City > Pin/Zip Code
INTERACTIONS	<ul> <li>&gt; Name</li> <li>&gt; Date of Birth</li> <li>&gt; Gender</li> <li>Recent In teractions</li> <li>&gt; Date</li> <li>&gt; Type</li> </ul>		> Remarks	> Permanent Address > Country > State > City > Pin/Zip Code
INTERACTIONS	<ul> <li>Name</li> <li>Date of Birth</li> <li>Gender</li> <li>Recent Interactions</li> <li>Date</li> <li>Type</li> <li>Mode</li> </ul>		> Remarks > Interaction Status	> Permanent Address > Country > State > City > Pin/Zip Code
INTERACTIONS	<ul> <li>&gt; Name</li> <li>&gt; Date of Birth</li> <li>&gt; Gender</li> <li>Recent In teractions</li> <li>&gt; Date</li> <li>&gt; Type</li> </ul>		> Remarks	> Permanent Address > Country > State > City > Pin/Zip Code
INTERACTIONS	<ul> <li>Name</li> <li>Date of Birth</li> <li>Gender</li> <li>Recent Interactions</li> <li>Date</li> <li>Type</li> <li>Mode</li> </ul>		> Remarks > Interaction Status	> Permanent Address > Country > State > City > Pin/Zip Code
	<ul> <li>Name</li> <li>Date of Birth</li> <li>Gender</li> <li>Recent Interactions</li> <li>Date</li> <li>Type</li> <li>Mode</li> <li>Nature</li> </ul>		> Remarks > Interaction Status	> Permanent Address > Country > State > City > Pin/Zip Code
	<ul> <li>Name</li> <li>Date of Birth</li> <li>Gender</li> <li>Recent Interactions</li> <li>Date</li> <li>Type</li> <li>Mode</li> <li>Nature</li> <li>Recent Tasks</li> </ul>		> Remarks > Interaction Status > Interaction By	> Permanent Address > Country > State > City > Pin/Zip Code
	<ul> <li>Name</li> <li>Date of Birth</li> <li>Gender</li> <li>Recent In teractions</li> <li>Date</li> <li>Type</li> <li>Mode</li> <li>Nature</li> <li>Recent Tasks</li> <li>Target Date</li> </ul>		> Remarks > Interaction Status > Interaction By > Time taken	> Permanent Address > Country > State > City > Pin/Zip Code



## Profile information of Non Individual Clients

BASIC DETAILS	Lead Source	Firm Details	Contact Details	Profile Details
	<ul> <li>&gt; Activity, if any</li> <li>&gt; Source / Activity Type</li> <li>My CRM Group</li> <li>&gt; My CRM Groups</li> <li>&gt; Add to CRM Group</li> <li>NJ Group Details</li> <li>&gt; NJ Group</li> <li>&gt; Assigned To</li> </ul>	<ul> <li>&gt; Name of Organization</li> <li>&gt; Date of Incorporation</li> <li>&gt; Registration Number</li> <li>&gt; Date of Registration</li> <li>&gt; Place of Registration</li> <li>&gt; PAN</li> <li>&gt; Legal Status</li> <li>&gt; Date of Commencement of Business</li> <li>&gt; Nature of Business / Profession</li> </ul> <b>Authorized Person Details</b> > Name <ul> <li>&gt; Designation / Role</li> <li>&gt; PAN</li> <li>&gt; Email</li> <li>&gt; NJ Client</li> <li>&gt; Date of Birth</li> <li>&gt; Mobile</li> </ul>	> Address > Country > State > City > Pin/Zip Code > Website > Tel.(Off.) > Tel.(Res.) > Fax	<ul> <li>&gt; Wealth Account Wealth A/C No.</li> <li>&gt; Non PMS Trading A/C No. Demat A/C No.</li> <li>&gt; PMS Trading A/C No. Demat A/C No.</li> <li>&gt; Gross Annual Income(p.a.)</li> <li>&gt; Financial Planning Interest</li> <li>&gt; Existing Life Insurance Cover</li> <li>&gt; Interested Product</li> <li>&gt; Comments / Observations</li> </ul>
ADDITIONAL DETAILS	Customer Insights <ul> <li>Industry (belongs to)</li> <li>No. of Employees</li> <li>Risk Category</li> <li>Net-worth</li> <li>Website</li> <li>E mail</li> </ul>		> Registered Offic > Country > State > City > Pin/Zip Code > Tel. (Off.) > Fax	e Address
INTERACTIONS TASKS	Recent Interactions         > Date         > Type         > Mode         > Nature         Recent Tasks         > Target Date         > Task Nature         > Assigned to (Employee)         > Title		> Rem > Inter > Inter > Time > Statu	action Status action By taken s pletion Date



#### How to track your Client related information ? Client > Client Report

The Client Report provides you with all the information saved on your Client. The report can be used to analyse.

- 1. Clients data
- 2. Clients with particular product preferences
- **3.** Clients of various demographic groups
- 4. Employee wise clients
- 5. Clients generated withing specific time period or from specifc source / activity

You can view the report online or generate a Excel file for the same. The report can be customized by selection of fields from *Customize your Report* where you can select the required fields and view the info.

You can also plan *Interaction* or allocate *Task* by using the plug in feature of **Add Interaction** and **Add Task** after selecting your Invitee List from the report generated.

	Client Report						
Assigned To :	BelectBhavik Tailor/ Brijesh Jivanji Aarya						
Product Interest :	General Insurance						
Source/Activity Type :	abcd ABCDE	*					
Origin :	NJ Self	~					
Activity,if any :	Self, CLIENT MEETING,13-07-2011,Piplod						
Period :	From 14/07/2011 To 14/07/2011						
Report On :	Screen CExcel						
	Customize Your Report						
Note: 1)Please select only 1 year duration in Period Selection.The report can fetch data for maximum 1 year at a time.							
2)The Customized report would display 15 fields on screen at the max. If you have selected more than that please Export the data using Excel for complete data.							
(3) To view a Client's Profile, please click on the	Account Name in report display.						
	Run Report Reset						



#### How to create and use customized groups using My CRM Groups ? Clients > My CRM Groups

We always try to give a superior experience to our premium Clients or we try to group our clients and prospects according to their preference and then send them regular updates or information according to their preferred choice of products and/or services.

There would be times where you would wish to send sms or email to a group of clients But how to keep such a list handy and updated because it is time consuming & a task requiring hard efforts to prepare and maintain.

My CRM Group feature is the solution for you..

	My CRM Groups         Add New- My CRM Group         * My CRM Group (Name):         SIP Regulars         Description:         Clients with greater than 5 SIP         * Group For         • Group For         Add								
				My CRM Group List					
Display R	ows: 10	V				Page 1 Of 1			
Sr.No.	Tick 🔲	Group Type	My CRM Group	Description	No. of Members	Creation Date			
1		CLIENT	Gold Class	Clients with AUM greater than 1 lakh but less than 5 lakhs	0	15-07-2011			
2		CLIENT	HNI	High Networth Clients with AUM greater than 5 lakhs	0	15-07-2011			
			Delet	e My CRM Groups Merge My CRM Groups Reset					

Creating a customized group of leads, clients is now simple.

- Step 1 : Give a name of your choice to create a My CRM Group. You can use names based upon the nature of lead/ clients you are clubbing together into this customized Group of people or you can name it on your objective to group these people together. For example you can create groups of Clients who are Doctors/ Engineer/ Businessman by occupation or you can create a Group of HNI clients based upon their Investment & Portfolio size
- Step 2 : Provide a brief description of the My CRM Group you created so it becomes easy for you to recall the objective or purpose to create the group
- Step 3 : Select the nature of people who would be part of the customized My CRM Group which can be your existing Clients or Prospective Clients, that is leads. Click on Add to create the group.

You can manage you My CRM Groups on ongoing basis...

Fundz Network

- 1. Merge groups if your require so
- 2. Delete unwanted groups

Merging & Deleting has been kept simple, wherein what you need to do is select the groups (using tick box) you wish to Merge/ Delete and click on the respective button to perform the action. The best part of **Merging** is that all the efforts you had made to map leads/clients to respective My CRM Groups would nit be wasted and while merging all such mapping would be updated into the Merged CRM Group

The CRM Group created here is available on the Profile page of Lead/ Client wherein you can simply add or remove the lead/ client to a customized My CRM Group listing.



## Activity



Actvities are an integral part of Lead generation, Client Acquisition and Business mobilisation. Actvities can be of...

- 1. Massive Scale or Person specific
- 2. Location Specifc or general
- 3. Period Specific or Objective specific
- 4. Self sponsored or Vendor sponsored

Activity Management, thus becomes important and crucial. The *Activity* module in NJ CRM has been designed for the very purpose. There are activities which are being planned and executed by NJ and there are also activities which you also must be planning and executing for your Business model.



## How to create and plan Activities ?

Activity > Manage Activity

					Create Activi	ty(Add Mo	ode)						
			* Source / Activity Type:	Sel	ect 🗾								
			* Date:	On On		0	From -	То					
			* Product(s):	INSURANCE MF REALTY			* Produ	ct Agenda:			*		k
			Target Audience:				Expec	ted Leads:					
			Total Cost (Rs.):				Time S	pent (Hrs.):					
			Tie-up/Vendor/Issuer:					* Venue:					
			* State:	Sel	ect			* City:		Select	····· <b>v</b>		
			Description:										
			Location:	Head Office Adajan Adajan rander		As	sign to	Employee:	Bhavik T Brijesh J checkOn	ivanji Aarya			
					Create Activ	ity Reset	:						
					Activi	ty List							
Displa	y Row	s: 10 💌									< < Previous	Page 1 Of 4	Next > >
Sr.No.	Tick	Activity Origin	Activity Date(s)	Source / Activity Type	Product - Product Agenda	Cost (Rs.)	Time Spent (Hrs.)	Venue	Tie-up/ Vendor/ Issuer	Assigned to	Expected Leads	Actual Leads	Modify
1		Self	13-07-2011	CLIENT MEETING	REALTY - Realty	5000	5	Piplod	N/A	N/A	50	(	) 🧷

- Step 1 : The minimum required information for creating an Activity are..
  - 1. Source ~Activity Type
  - 2. Date or period during which the Activity is planned to be carried out
  - 3. Product and Product Agenda for which the activity is being planned
  - 4. Venue , State and city of the activity.
- Step 2 : Apart from these you can enter other details like Target Audience, Cost involved in the Activity, Leads expected.
- Step 3 : Once you have completed with the details and have saved it to create the Activity, it would be visible on your Calender and to all employees, team members who have been allocated the activity to be worked upon.
- Step 4 : You can edit , update and manage the Activity related information by using the **Modify** function provided in the activity listing beside each activity.



## How to track Activities ?

Activity > Activity Report

	Activity Report							
Source / Activity Type :	ε μ ε Origin : NJ Self							
* Activity,if any :	Self, CLIENT MEETING,13-07-2011,Piplod Self, CLIENT MEETING,01-07-2011,Essar Self, NEWS PAPER ADS,10-06-2011,-							
Product(s) :	Product Agenda :							
Period :	Period : From 21/07/2011 0 - To 21/07/2011							
Report On :	Screen Cxcel							
	Customize Your Report							
Select Report Fields	Total Fields 0							
Activity Details	<ul> <li>Product</li> <li>Product Agenda</li> <li>Time Spent (Hrs.)</li> <li>Cost (Rs.)</li> <li>Tie-up / Vendor / Issuer</li> <li>Expected Leads</li> <li>Actual Leads</li> <li>Converted Leads</li> <li>Activity Origin</li> <li>Source / Activity Type</li> </ul>							
	Run Report Reset							

The report can be generated on screen or you can generate an excel of the same. Making no selections from the menu would generate a report of all the **Activities** done within the period selected by you. However, you can make selections to see the report of Activity planeed or done...

- 1. By your team of Employees, or
- 2. Based on the **Source**, or
- 3. Based on Product and Product agenda focussed activities .

You can view the report online or generate a Excel file for the same. The report can be customized by selection of fields from *Customize your Report* where you can select the required fields and view the info.



## Interactions



We often tend to record our communication, meetings details done with our Prospects & Clients so that next time when we meet the person we can have the history of conversation we had with the person and what the person had communicated back. At times we even try to schedule our meetings so that it can be smoothly executed.

*Interactions* is designed to take care of this very need. It functions like a meeting scheduler, meeting minutes recorder, meeting history viewer and much more.

	Add Interaction							
	Interaction Deta	ils				_		
	* Date	18/07/2011	* Sta	artTime : 10 💌	00 💌 AM 💌	1		
	* Type : Group 🔽 1 * Mode : In Person 👱				2			
	* Nature	Product Promotion	🗾 🔁 * Agenda	Name : PMS prod	luct promotion to HNI:	5		
	Interaction By : Select							
	Interaction Status : Scheduled							
	Location	: Hotel Landmark						
	Remarks/ Minutes : Take 50 Brochures, 20 Forms							
	Add Persons							
	Contact Nature	Other	<b>5</b>			-		
	Name	:	Email :		Add			
			Persons List					
No.	Contact Nature		Name	Mobile	Lead Status	Remove		
		A	Name					
1	Client	Ashish		-	-	Remove		
2	Client	Balasubra		-	-	Remove		
3	Lead	Dipen		-	-	Remove		
4	Guest	Pratik Singh		-	-	Remove		
		Crea	ate Interaction Res	et				

## How to create an Interaction ?

#### Interactions > Add Interaction

- Step 1 After selection of date & time of your scheduled / completed meeting, select the *Type*, that is 1 to 1 Or *Group*.
   1 to 1 interaction means when you are communicating or interacting with a <u>single specific person</u> while
   *Group* interaction simply means that the communication is to be made or has been made to a <u>group of people</u>.
- Step 2 Select the mode of your communication/ meeting which can be one of the listed...
  - 1. In Person
  - 2. Telephonic
  - 3. **Email**
  - 4. Video Conf.
  - 5. SMS



- Step 3 Select the *Nature* of your meeting which simply classifies the kind of meeting you have scheduled or done with the Invitees. It could be of the type...
  - 1. Relationship Building
  - 2. Review Portfolio
  - 3. Investment Planning
  - 4. Product Promotion
  - 5. Service Related
  - 6. Data / Form collection
  - 7. Follow Up
  - 8. Other

Next write the **Agenda Name** for which you are making the communication or holding the meeting with your prospects, clients, team, etc... You can also allocate the communication responsibility to your team member for managing the same.

- Step 4 Select the *Status* of the Interaction depending upon the current situation of the same. It can be any of the 4 status as listed below...
  - 1. Scheduled When you are pre-planning a meeting/ communication
  - 2. Postponed When a scheduled meeting/ communication gets postponed to a later date due to any reason
  - 3. Investment Planning When a scheduled meeting/ communication gets cancelled
  - 4. Product Promotion To update the status of a scheduled Interaction which was completed
- Step 5 After recording the Location details of your meeting (if involved) and any Remarks, comes the most important part of the Interaction, is the person(s) detail with whom you are communicating.

To make the identification and listing easy for you, select the **Contact Nature** under the section **Add Persons** which could be a <u>lead, existing client, your team member or some other guest.</u>

As you type the name of the person, the system would suggest you the name as per your database in NJ CRM from which you can select and *Add*. As you keep on adding the persons, a list of the same would be visible below. You can add more or *Remove* as per your requirement. Click on *Create Interaction* to save these details

When you save this Interaction, this would be captured and recorded on..

- 1. Profile of every invited person (Lead/ Client/ Group) as Recent Interactions
- 2. Calendar under Interactions list as per the date of Interaction
- 3. Interaction Report



### How to manage an Interaction ?

#### Interactions > Interaction Report / Recent Interactions / Calender

The need might arise to edit/ update the Interaction details at any point of time. Edit feature allows you to do the same with ease. You can access the Interaction which you require to edit/ update from any of the 3 locations (1.Profile of lead/ client/ group, 2.Calender, 3.Interactions Report )

			_					Interac	tion F	Report							
C	Display R	tows: 10	•										< < Previous	Pag	je 1 Of 8		Next > >
-	Sr.No.	Date		Туре		Mode		Nature		Agenda	Remarke	Participant(s)	Created By		tion Status:		Interaction By
			Filter: A	All		Filter: All	Filte			Name				Filter: All			Filter: All
- -	- 1	<u>18-07-2011</u>	1 to 1			Telephonic	Rela	tionship Building			NA	2	advisors	Scheduled			
	2	18-07-2011	1 to 1			SMS	Rela	tionship Building			NA	4	advisors	Scheduled			
_	3	18-07-2011	1 to 1			Telephonic	Rela	tionship Building			NA	2	advisors	Scheduled			
-	4	18-07-2011	1 to 1			Telephonic	Rela	tionship Building			NA	2	advisors	Scheduled			
-	5	18-07-2011	1 to 1			Telephonic	Rela	tionship Building			NA	2	advisors	Scheduled			
	Sr.No 1 2 13/07/	<u>28-06</u> <u>28-06</u>				* Type : Gr * Nature : Prr Interaction By : Interaction Status : Sc Location : Hot	heduled tel Landri	motion	• 1 • 3 • 4	•	Mode :	10 1000		2			Interaction By advisors advisors
-	Sr.No.		nda N		4	Add Persons										us	Interaction By
-	Sr.No. 1	Portfolio n Pratik Ma	eview		A	Add Persons Contact Nature:Ott Name:	her		_	Email :				Add		us	Interaction By Self
-	1	Portfolio n Pratik Ma	eview		A	Contact Nature: Ott Name:	her	Pers	]							us	
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-	1	Portfolio n Pratik Ma	eview		Client	Contact Nature: Ott Name:	her Ash	Pers Name	]		Mo			s Re	move	us	
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-	1	Portfolio n Pratik Ma	eview	1 0	Client	Contact Nature: Ott Name:	Ash Bala	Pers Name ish asubra	]			-	Lead Statu	s Re Re Re	emove emove	us	
-	1	Portfolio n Pratik Ma	eview	1 0	Client	Contact Nature: Ott Name:	Ash	Pers Name ish asubra	]			-	Lead Statu	s Re Re Re	emove	us	
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-	1	Portfolio n Pratik Ma	eview	1 ( 2 ( 3 [	Client Client Lead	Contact Nature: Ott Name:	Ash Bala Dipe Prat	Pers Name ish asubra en itk Singh	ons l	List	•	- · · · · · · · · · · · · · · · · · · ·	Lead Statu - - -	s Re Re Re	emove emove emove		
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-		Portfolio r Pratik Ma Pratik Ma	• view (  pani	1 ( 2 ( 3 L 4 ( "itter. All	Client Client Lead Guest	Contact Nature : Ott Name : Contact Nature	Ash Bala Dipo Prat	Pers Name ish asubra en tik Singh Jpdate Resel Run Reg Interac Nature ter All	t [ C	List Delete [ Reset Report	Close Remarks I		< Previous Created By Created By	s Re Re Re Re Re Re Re Re Re Re Re Re	emove emove emove emove	Next :	Self
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No	Caption / Field Name	Description
1	Date	Date of the Interaction / communication /meeting. Clicking on the date would open up the Interaction in Edit mode.
2	Туре	<b>1 to 1</b> denotes interaction done with specific person, and <b>Group</b> signifies where a group of people were addressed together
3	Mode	Mode of Interaction ( communication / meeting )
4	Nature	The nature, or in simple terms the purpose of Interaction, ex for Relationship Building ( communication / meeting )
5	Agenda Name	The exact agenda of having the Interaction



6	Remarks	Name of the person
7	Partcipant(s)	Shows the number of participants invited/ involved in an Interaction. Clicking on the hypelink provides the list shwing details of all invited
8	Created By	For saving the contact number of the person
9	Interaction Status	For identifying the source or activity from where that lead came to you.Clicking on the link shows the change of status from one to another.
10	Interaction By	Shows the name of person who last interacted or communicated with the person

## How to use the Interaction report ?

The report can be generated on screen or you can generate an excel of the same. Making no selections from the menu would generate a report of all the Interactions done within the period selected by you. However, you can make selections to see the report of Interactions made...

- 1. By your team of Employees, or
- 2. Based on the Interaction Type, or
- 3. Based on Interaction Mode chosen, or
- 4. Based on Nature of Interactions, or
- 5. Based on Status of Interactions, or
- 6. Interactions made with a Specific Lead/ Client/ Group



## Tasks



Apart from various Activities, Meetings and other events, we also undertake various tasks of miscellaneous nature. The Task utility and report is

*Tasks* is designed to facilitate this need. You can Create, Allocate, Schedule, Manage, Update and Track the tasks for better management.

	Add Task
Task Details	
Creation Date	: 18/07/2011
* Target Date	18/07/2011         10         Assigned to (Employee):        Select         Image: Complex com
* Nature	: Data / Form collection 🗾 1 Status : Not Started 💌
* Title	: Collect SIP forms
Remarks	: Take 2 cheques, 5000 each
Task for	
Contact Nature	: Client 🗾 3
Text like	: Ratilal ~ Individual ~ 9711111171
	Create Task Reset

#### How to create a Task ? Task > Add Task

- Step 1 After selection of *Target Date* and allocating the same to respective employee, select the *Nature* of the task. The nature of the task can be....
  - 1. Service Related related task, or
  - 2. *Review Portfolio* related task, or
  - 3. Product Promotion related task, or
  - 4. Data/ Form collection related task, or
  - 5. *Follow Up* related task, or
  - 6. **Other**

Continued...



- Step 2 Next select the Status of the task, where you can schedule a task or simply report a task which not scheduled but performed. Task have designed to be performed Person Specifc so that it becomes easier to manage & track.Select the mode of your communication/ meeting which can be one of the listed...
  - 1. Not Started
  - 2. In Process
  - 3. Completed
  - 4. Cancelled

Step 3 After recording the **Remarks** (if any), comes the part of identifying the Person on whom the task is related to

To make the identification and listing easy for you, select the **Contact Nature** which could be a <u>lead, existing client</u>, <u>group, your team member or some other guest</u>.

As you type the name of the person, the system would suggest you the name as per your database in NJ CRM from which you can select and Click on *Create Task* to save these details

When you save this Task, this would be captured and recorded on..

- 1. Profile of every invited person ( Lead/ Client/ Group) as Recent Tasks
- 2. *Calendar* under Tasks list as per the date of Task
- 3. Task Report



#### How to manage a Task ? Tasks > Task Report / Recent Tasks / Calender

Just like Interactions, the need might arise to edit/ update the Task details at any point of time. Edit feature allows you to do the same with ease. You can access the Task which you require to edit/ update from any of the 3 locations ( 1.Profile of lead/ client/ group, 2.Calender, 3.Task Report )

							Ta	sk Re	port						
Disp	lay Ro	ws: 10 🔽										< < Prev	vious Page 1 Of	12 Next > >	
ðr.N	o 🚖	Title		Nature	🚖 Status	Remark	Assigned to (Employed	ee)	т	ask For	Time Spent (min)	Creati			farget Date
					*		Filter: All		Nature	Name	,	Date	e Date	Filter: All	
• •	1 SIP	Form collect for Reliand	<u>ce</u> Serv	vice Related	Not Started	N/A	Self		Client	Nimesh N Vy	as N/A	18-07-2	2011 N/A		18-07-2011
	2 <u>PM</u>	S cheque collection	Ser	vice Related	Not Started	N/A	Self		Client	A0000030	N/A	05-07-2	2011 N/A		05-07-2011
	3 <u>Tak</u>	e NFO forms	Ser	vice Related	Not Started	N/A	Self		Client	A0000030	N/A	05-07-2	2011 N/A		05-07-2011
	4 Del	ver Bday greeting	Ser	vice Related	Not Started	N/A	Self		Client	A0000030	N/A	05-07-2	2011 N/A		05-07-2011
	5 <u>Del</u> i	ver FP form at client offi	ice Serv	vice Related	In Progress	N/A	Self		Client	A00000011	N/A	05-07-2	2011 N/A		05-07-2011
Y	Inter	actions Task	(s												
							Rece		asks						
Sr.N	_	-	TaskN	lature	Assign	ned to (	Employee)		Title		Time taken	Stat	tus Com	pletion Da	te Rema
- 4		<u>48-07-2011</u> Sen	vice Re	elated	c1advisors	s	SIP Form	collec	t for Reli	ance	-	Not Star	rted	-	-
							Add Task	Clo	ose Wind	ow					
	/07/1														
Int	erac	tions													
Sr	No.	Agenda Nam	е		Туре		Mode		Nature		Participants		Interaction	Status	Interaction
		Portfolio review with Pratik Malpani	h Mr.	1 to 1		In	Person R	Relatio	nship Bu	ilding		1	Scheduled		Self
Та	isks			_											
Sr	No.	Title		Та	sk Nature		Time taken	Cor	mpletion		Remarks		Statu	s	Assigned
	1	SIP forms		Data / For	rm collectio	n -			-		ake 2 cheques of 5 ach	000	Not Started		Self
				1		1	i								
							Ed	lit Ta	aek						
			ask De	etails			Lu		ISK						
				Creat	tion Date :	18/07/2	011								
				* Tar	get Date :	18/07/2	2011 🔟		Assigne	d to (Empl	oyee):	Sele	ct	-	
					* Nature :	Data /	Form collection	- 1		5	tatus : Not Start	ed		2	
					* Title :	Collect	t SIP forms								
				F	Remarks :	Take 2	cheques, 5000 each								
		Та	ask fo	r											
				Conta	ct Nature :	Client		-							
					Name :	Ratilal	~ Individual ~ 9711111	1711					Delete	]	
							Update Task Rese	et	Delete T	ask Clo	se				

Clicking on the **Date** (Recent Tasks) and **Task Title** from Task Report and from Task Listing on Calendar page, will open the particular Task in **Edit** mode, where you can edit or update the details of your task. Every updated details would be updated in respective records.

**Note :** *Task for* cannot be edited by you once task has been created, that is, the lead/ client/ group for which the task was created can not be changed or created, You will have to delete this task & create a new task for the new person.



#### How to track Tasks using Task Report ? Tasks > Task Report

The report can be used to see Tasks and related details, done within the period selected by you.

	Task Report
Employee Filter :	Bhavik Brijesh
Task Nature :	Service Related Review – Portfolio Product Promotion
Task Status :	Not Started In Progress
Task For	
Contact Nature :	Select
Period :	Created Completed Target Date
* From	05/07/2011 0 *To 19/07/2011
Report On :	Screen Excel
	Run Report Reset

Task Report												
Display Rows: 10 s << Previous Page 1 Of 12 Next >>												
Sr.No		▲ Nature	≑ Status	Remarks	Assigned to (Employee)	Task For		Time Spent (min)	Creation	Completion		
01.140		- Hatare			Filter: All	Nature	Name	This open (init)	Date	Date	Filter: All	
1	SIP Form collect for Reliance	Service Related	Not Started	N/A	Self	Client	Nimesh N Vyas	N/A	18-07-2011	N/A	18-07-2011	
2	PMS cheque collection	Service Related	Not Started	N/A	Self	Client	A0000030	N/A	05-07-2011	N/A	05-07-2011	
3	Take NEO forms	Service Related	Not Started	N/A	Self	Client	A0000030	N/A	05-07-2011	N/A	05-07-2011	
4	Deliver Bday greeting	Service Related	Not Started	N/A	Self	Client	A0000030	N/A	05-07-2011	N/A	05-07-2011	
5	Deliver FP form at client office	Service Related	In Progress	N/A	Self	Client	A00000011	N/A	05-07-2011	N/A	05-07-2011	

No	Caption / Field Name	Description
1	<u>Title</u>	Shows the Task title. Clicking on it opens the Task in edit mode
2	Nature	The nature, or in simple terms the purpose of task, ex data/form collection form a Client
3	Task Status	Status of the task on current date based upon last updation.
4	Remarks	Remarks ( if any) captured on the Task
5	Assigned To	Name of the employee, team member to which it was assigned.
6	Task For	Displays the nature & name of Person on whom the Task was created.
7	Time Spent	Displays the time spent on completing the Task
8	Creation Date	Date on which the Task was created.
9	Completion Date	Date on which the Task was completed.
10	Target Date	Date on which the Task has been scheduled to be completed.



#### How to use the Task report ?

The report can be generated on screen or you can generate an excel of the same. Making no selections from the menu would generate a report of all the Tasks done within the period selected by you. However, you can make selections to see the report of Tasks made...

- 1. By your team of Employees, or
- 2. Based on the Nature of Task, or
- 3. Based on Status of Tasks, or
- 4. Task done on Specific Lead/ Client/ Group

#### Coming Soon....

- 1. Opportunity Management
- 2. SMS Manager integrated into NJ CRM
- 3. Email Utility

For all kind of Feedback, Suggestions on this initiative please write to us on feedback@njindiainvest.com.

We will keep you updated on all the additions to NJ CRM in a defined manner and would also work on the feedback & suggestions forwarded by you.

Regards, NJ Fundz Team

