

CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

| Module Details | User Interface | Report |
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| CUSTOMER RELATIONSHIP MANAGEMENT (CRM) | | |
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| | Lead Status | Sales Quotation Report |
| | Lead Type | Sales Transaction Tracking |
| | Lead Source | |
| | Lead Start Plan | |
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| | Follow Up | |
| | Quotation Follow Up | |



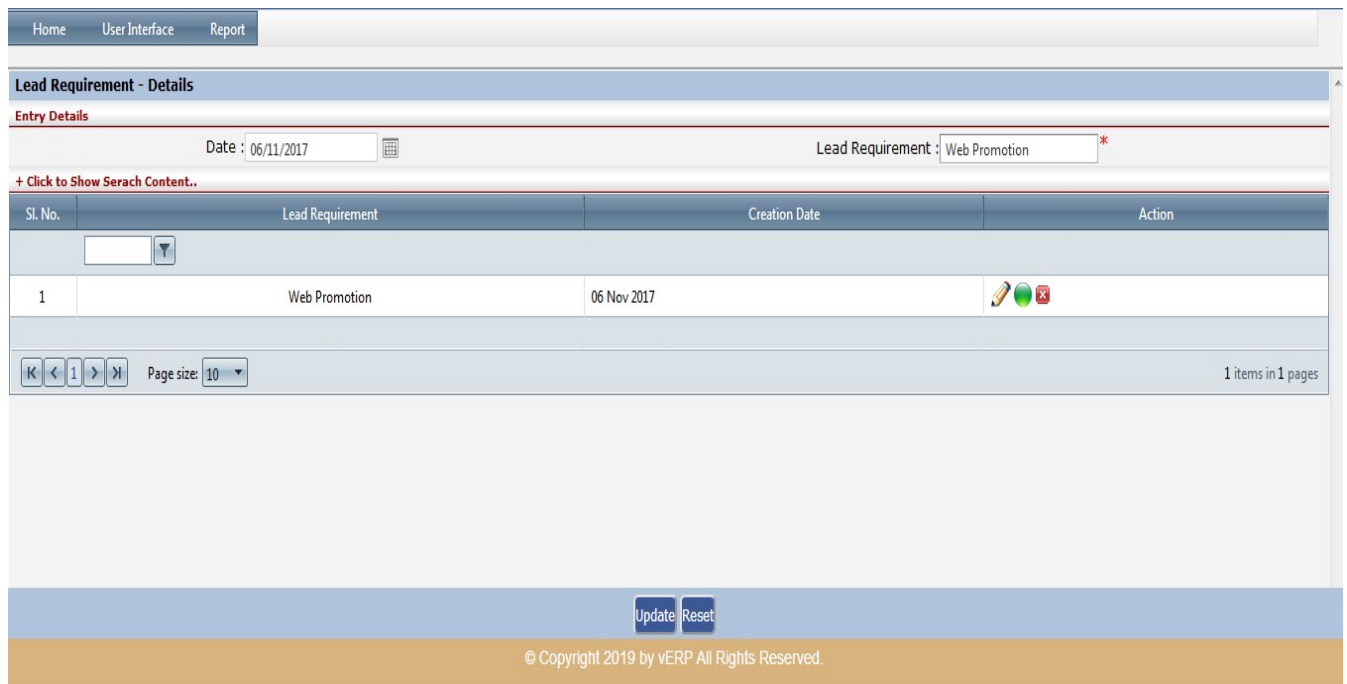
CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

Customer relationship management is one of many different approaches that allow a company to manage and analyse its own interactions with its past, current and potential customers

Lead Requirement

Lead qualification criteria are characteristics that help to classify a lead by the degree of its willingness and readiness to buy. As a result of this qualification, one can distinguish, in terms of making a purchase, the leads with the most and least potential: hot, warm, and cold.

- Click on User interface button to select the Lead Requirement
- Select date and input Lead requirement
- Click on "save" button to save the records
- To update a particular record, click on "✎" icon.
- To delete any particular record click on "✖" icon
- To active/ Inactive a particular record, click "🟢" icon



The screenshot shows the 'Lead Requirement - Details' page in the vERP system. At the top, there are navigation tabs for 'Home', 'User Interface', and 'Report'. Below this, the page title is 'Lead Requirement - Details'. Underneath, there's a section for 'Entry Details' with a 'Date' field set to '06/11/2017' and a 'Lead Requirement' dropdown menu currently showing 'Web Promotion'. A red asterisk indicates a required field. Below this is a link '+ Click to Show Search Content..'. The main part of the page is a table with columns: 'Sl. No.', 'Lead Requirement', 'Creation Date', and 'Action'. The table contains one row with '1' in the first column, 'Web Promotion' in the second, '06 Nov 2017' in the third, and three icons (pencil, green circle, red X) in the fourth. At the bottom of the table, there are navigation controls including 'Page size: 10' and '1 items in 1 pages'. Below the table, there are 'Update' and 'Reset' buttons. At the very bottom, there is a copyright notice: '© Copyright 2019 by vERP All Rights Reserved.'



Lead Status

The lead status field is often a source of contention between Marketing and Sales within an organization. The field is typically used to communicate the status of a record to both the reporting users and the sales rep who is working the lead

- Click on User interface button to select the Lead Status
- Select date and input Lead Status
- Click on "save" button to save the records
- To update a particular record, click on "✎" icon.
- To delete any particular record click on "✖" icon
- To active/ Inactive a particular record, click "🟢" icon



The screenshot shows the 'Lead Status - Details' page in the vERP system. It includes a navigation bar with 'Home', 'User Interface', and 'Report' tabs. Below the title, there are 'Entry Details' with a date field set to '25/04/2017' and a 'Lead Status' dropdown menu set to 'Pending'. A search bar is available with the text '+ Click to Show Search Content...'. The main content is a table with columns for 'Sl. No.', 'Lead Status', 'Creation Date', and 'Action'. The table contains three rows of data. At the bottom of the table, there are navigation controls for page size (set to 10) and page number (1 of 1). Below the table, there are 'Update' and 'Reset' buttons. The footer of the page contains the copyright notice: '© Copyright 2019 by vERP All Rights Reserved.'

| Sl. No. | Lead Status | Creation Date | Action |
|---------|--------------|---------------|--------|
| 1 | Pending | 25 Apr 2017 | ✎ 🟢 ✖ |
| 2 | Successful | 25 Apr 2017 | ✎ 🟢 ✖ |
| 3 | Unsuccessful | 25 Apr 2017 | ✎ 🟢 ✖ |



Lead Type

A lead is a potential customer who might be interested in your products or services. To get the customer through the door, you may be doing all or any of the following:
 Listing your product on directories. Maintaining an updated and searchable website.
 Meeting people at trade events.

- Click on User interface button to select the Lead Type
- Select date and input Lead Type
- Click on "save" button to save the records
- To update a particular record, click on "✎" icon.
- To delete any particular record click on "✖" icon
- To active/ Inactive a particular record, click "🟢" icon

Home User Interface Report

Lead Type - Details

Entry Details

Date : 25/04/2017 Lead Type : Business *

[+ Click to Show Search Content..](#)

| Sl. No. | Lead Type | Creation Date | Action |
|--|------------------------------|---------------|--------|
| 1 | Business | 25 Apr 2017 | |
| 2 | CONSUMER/END USER | 27 Apr 2017 | |
| 3 | DEALER | 27 Apr 2017 | |
| 4 | TANK FABRICATOR | 27 Apr 2017 | |
| 5 | INFRASTRUCTURE DEVELOPMENT | 27 Apr 2017 | |
| 6 | MINES OPERATOR | 27 Apr 2017 | |
| 7 | LOGISTICS OR FUEL MANAGEMENT | 27 Apr 2017 | |
| 8 | RETAIL OUTLET | 27 Apr 2017 | |
| Update Reset | | | |
| 10 | Construction Company | 28 Apr 2017 | |

⏪ ⏩ 1 2 ⏭ ⏮ ⏰ ⏴ ⏵
Page size: 10
13 items in 2 pages

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Lead Source

A lead source can best be defined as the original point at which a customer first hears about you. It's the first step in your lead funnel and ground zero for your relationship with your customers.

- Click on User interface button to select the Lead Source
- Select date and input Lead Source
- Click on "save" button to save the records
- To update a particular record, click on "✎" icon.
- To delete any particular record click on "✂" icon
- To active/ Inactive a particular record, click "🟢" icon

Home User Interface Report

Lead Source - Details

Entry Details

Date : 29/05/2019 Lead Source : *

[+ Click to Show Search Content..](#)

| Sl. No. | Lead Source | Creation Date | Action |
|---------|------------------|---------------|--|
| 1 | News Paper | 25 Apr 2017 | <input type="button" value="✎"/> <input type="button" value="🟢"/> <input type="button" value="✂"/> |
| 2 | Website | 25 Apr 2017 | <input type="button" value="✎"/> <input type="button" value="🟢"/> <input type="button" value="✂"/> |
| 3 | Electronic Media | 25 Apr 2017 | <input type="button" value="✎"/> <input type="button" value="🟢"/> <input type="button" value="✂"/> |
| 4 | Twitter | 25 Apr 2017 | <input type="button" value="✎"/> <input type="button" value="🟢"/> <input type="button" value="✂"/> |
| 5 | Linkedin | 25 Apr 2017 | <input type="button" value="✎"/> <input type="button" value="🟢"/> <input type="button" value="✂"/> |
| 6 | BLOG | 09 May 2017 | <input type="button" value="✎"/> <input type="button" value="🟢"/> <input type="button" value="✂"/> |

Page size: 10 6 items in 1 pages

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Lead Start Plan

An effective lead generation plan makes your sales team more productive. When you develop a flow of qualified leads for your sales team, they can close more sales. A well-developed sales lead generation program: provides a continuous flow of quality leads. ... integrates your company's marketing and sales efforts.

- Click on User interface button to select the Lead Start Plan
- Select date and input Lead Start Plan
- Click on "save" button to save the records
- To update a particular record, click on "✎" icon.
- To delete any particular record click on "✖" icon
- To active/ Inactive a particular record, click "🟢" icon




Home User Interface Report

Lead Start Plan - Details

Entry Details

Date : 29/05/2019 Lead Start Plan :

+ Click to Show Search Content..

| Sl. No. | Lead Start Plan | Creation Date | Action |
|---------|-----------------|---------------|---|
| 1 | Urgent | 25 Apr 2017 |    |

Page size: 10 1 items in 1 pages

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Lead Master

Lead Master is a SaaS-based all-in-one lead management solution that offers capabilities to capture, track and follow up with leads. The solution comprises of integrated modules for sales force automation, customer relationship management, marketing automation, business analytics and more.

- Click on User interface button to select the Lead Master
- Enter the Lead Details and Lead company Details
- Click on "save" button to save the records
- To update a particular record, click on "✎" icon.
- To delete any particular record click on "✖" icon

[- Click to Hide - Lead Details...](#)

Lead Details

Lead Date : 05 Sep 2017 12:24:03 PM

Lead Assigned To : SUBHAJIT NEOGI

First Name : Das

Last Name : Babu

Cell / Mobile 1 : 9937781162

Job Title : Website Design

Branch (If Any) : NewTown

Father's Name : *Father's Name*

Address(1) : Bargaon Sundargarh Odisha

City : kolkata

Nearest Land Mark : New Town

Designation : Accountant

Title : Mr.

Middle Name :

Email Id : bdm.kolkata@verp.in

Cell / Mobile 2 : 9898989898

Company Name(if Any) : Baba Gosain Filling Station

Department (if Any) : Accounts

Gender : Male Female

Address(2) : *Address2*

Zip : 700102

Country : India

Update Reset

District : Kolkata

Lead's Status : Pending

Mandal / Division : KOL0001

Appointment Date : 05 Sep 2017 12:24:03 PM

[- Click to Hide - Lead Company's Details...](#)

Lead Company Details

Address(1) : kolkata

Nearest Land Mark : *Land Mark*

Country : India

District : --Select District --

City : kolkata

Website : vehement.in

Phone No. (2) : () - () - ()

No. of Employee : 51-100

Industry : OC

Date of Incorporation : 05/09/2017

Address(2) : kolkata

Zip : *Zip Code*

State : ANDAMAN & NICOBAR ISLANDS

Mandal / Division : --Select Division --

Instant Messenger Id : *Messenger Id*

Phone No. (1) : () - () - ()

Fax No. : () - () - ()

Annual Revenue : Less Than 50 Lacs

Nature of Work : *Nature of Work*





















[+ Click to Show - Lead Personal Details...](#)

[+ Click to Show - Lead Source Details...](#)

[+ Click to Show - Item Type Details.....](#)

Search Information

Search By : ---Select All---

| Sl. No. | Name | Gender | Mobile Number | State | District | Appointment Date | Entry By | Entry Date | Company Name | Ticket No | Action |
|---------|---------------------------------------|--------|---------------|---------------|----------|-------------------------|------------------|-------------------------|---------------------------------------|------------|---|
| 1 | Das Babu | Male | 9937781162 | West Bengal | Kolkata | 05 Sep 2017 12:24:03 PM | BANNISIKHA GHOSH | 05 Sep 2017 12:27:43 PM | Baba Gosain Filling Station | 0002711718 |   |
| 2 | Omji | Male | | Bihar | | 05 Sep 2017 10:40:41 AM | BANNISIKHA GHOSH | 05 Sep 2017 10:52:05 AM | Ujala Fuel Centre | 0002701718 |   |
| 3 | Abhishek Vijaywargi | Male | 9028449444 | Maharashtra | | 05 Sep 2017 10:15:19 AM | BANNISIKHA GHOSH | 05 Sep 2017 10:19:38 AM | AEC MINERALS | 0002691718 |   |
| 4 | Biplab Biswas | Male | 8642071795 | West Bengal | | 04 Sep 2017 02:27:09 PM | BANNISIKHA GHOSH | 04 Sep 2017 02:30:22 PM | Tarapith Filling Station | 0002681718 |   |
| 5 | Surendra pal Singh | Male | 8953831058 | Uttar Pradesh | | 04 Sep 2017 02:00:52 PM | BANNISIKHA GHOSH | 04 Sep 2017 02:07:17 PM | Hamara Pump | 0002671718 |   |
| 6 | Mukesh Singh | Male | 9073606083 | West Bengal | | 04 Sep 2017 11:08:30 AM | BANNISIKHA GHOSH | 04 Sep 2017 11:13:55 AM | | 0002661718 |   |
| 7 | Sri. Jiban Krishna Roy J B Enterprise | Male | 9435020539 | Assam | | 02 Sep 2017 12:05:16 PM | BANNISIKHA GHOSH | 02 Sep 2017 12:07:53 PM | J B Enterprise | 0002651718 |   |
| 8 | B.R.STRUCTURAL & ALUMINIUM INTERIOR'S | Male | | Tamil Nadu | | 02 Sep 2017 11:37:26 AM | BANNISIKHA GHOSH | 02 Sep 2017 11:42:57 AM | B.R.STRUCTURAL & ALUMINIUM INTERIOR'S | 0002641718 |   |
| 9 | Naresh Kumar | Male | 8918701659 | West Bengal | | 01 Sep 2017 03:35:42 PM | BANNISIKHA GHOSH | 01 Sep 2017 03:42:08 PM | Naresh Kumar | 0002631718 |   |
| 10 | Tapan J Patel | Male | 9427558014 | Gujrat | | 01 Sep 2017 11:19:20 AM | BANNISIKHA GHOSH | 01 Sep 2017 11:32:25 AM | VIPUL BUILDCON | 0002621718 |   |



Follow Up

The act of following up. an action or thing that serves to increase the effectiveness of a previous one, as a second or subsequent letter, phone call, or visit.

- Click on User interface button to select the Follow Up
- To select the Ticket Number to get the Lead Information Details
- Then input the follow up Description
- Click on "save" button to save the records
- To update a particular record, click on "✎" icon.
- To delete any particular record click on "✖" icon

vERP

Logged in as pm@verp.in
Siddhartha Dikshit
You have: 0 New Message

Email
Contact
Inbox
Chat
Logout

Home | User Interface | Report
Follow Up Information

Choose a Ticket Number : 0000021718 *
Lead Assigned To : BANNISIKHA GHOSH

Lead Information - Details

Company name: Raunaq ice & cold storage
 First Name: Kaushik
 Last Name: khetalpar
 E Mail: khkhetalpar@gmail.com
 Phone :
 Mobile: 9879594441
 Address: Ahmedabad
 City: ahmedabad
 Zip Code:
 Lead Owner:

| Sl. No. | Ticket No | Country | Branch | Department | Designation | Name | CompanyName | Mobile No | Email Id | Lead Source | Industry |
|---------|------------|---------|--------|------------|-------------|-----------------------|-------------|------------|-----------------------|------------------|----------|
| 1 | 0000021718 | India | | | | Mr. Kaushik khetalpar | | 9879594441 | khkhetalpar@gmail.com | Electronic Media | |

1 items in 1 pages

Last Follow Up Details

| Sl. No. | Name | Lead Date | Next FollowUp Date | FeedBack | Description | LeadStatus | Entry By |
|---------|-----------------------|-------------------------|-------------------------|--|-------------|------------|------------------|
| 1 | Mr. Kaushik khetalpar | 25 Apr 2017 02:33:52 PM | 22 Apr 2017 12:00:00 AM | | | Pending | BANNISIKHA GHOSH |
| 2 | Mr. Kaushik khetalpar | 25 Apr 2017 03:27:05 PM | 29 Apr 2017 11:00:00 AM | customer is satisfied during this conversation | | Pending | BANNISIKHA GHOSH |

2 items in 1 pages

Follow Up Description

Feedback : Call me tomorrow 5pm
 Entry Date : 06 Feb 2018 02:46:03 PM
 Next Follow Up Date : 06 Feb 2018 02:46:03 PM
 Lead Status : Pending
 Description:
 Close:
 Admitted: Yes No

Items Details

Item Type Details - Search
 Rate : Normal
 Product Type : Pump Unit Assy PTO
 CC Center : Head Office
 Group : FINISHED

| Sl. No. | Part No | Product Name | Product Code | Description | Order Qty. | Unit | Rate | Total | Action |
|---------|---------|--|--------------|-------------|------------|------|----------|----------|--------|
| 1 | | Meter for Volumetric Measurement SP-002 Complete (12 V battery Operated) Set | F0003 | | 1.00000 | Pcs | 78000.00 | 78000.00 | |

Total Amount = 78000.00

Search Information

Search By : Select All

| Sl. No. | Followup No | Ticket No. | Lead Owner | Name | Company Name | Phone No | Email Id | Address | Entry Date | Next Followup Date | Action |
|---------|-------------|------------|------------------------|---------------------------------------|---------------------------------------|------------|------------------------------|---|-------------------------|-------------------------|--------|
| 1 | FL539 | 0000021718 | BANNISIKHA GHOSH | Kaushik khetalpar | Raunaq ice & cold storage | 9879594441 | khkhetalpar@gmail.com | Ahmedabad | 06 Feb 2018 02:46:03 PM | 06 Feb 2018 02:46:03 PM | |
| 2 | FL538 | 0002711718 | MITADRU MUKHERJEE | Das Babu | Baba Gosain Filling Station | 9937781162 | | Bargaon Sundargarh Odisha Dist : Rourkella | 05 Sep 2017 12:24:03 PM | 05 Sep 2017 12:24:03 PM | |
| 3 | FL536 | 0002701718 | BANNISIKHA GHOSH | Omji | Ujala Fuel Centre | | | At+ PO- Tahani PS-Alamnagar Dist- Medinipura Pin-85239 Patne | 05 Sep 2017 10:52:09 AM | 05 Sep 2017 10:52:09 AM | |
| 4 | FL534 | 0002691718 | CHANDAN MUKHERJEE | Abhishek Vijaywargi | AEC MINERALS | 9028449444 | | 604,Gomati Apartment, 6 th Floor, Law College Sq. WHC Road, Dharampet, Nagpur. 440010 | 05 Sep 2017 10:19:44 AM | 05 Sep 2017 10:19:44 AM | |
| 5 | FL532 | 0002681718 | CHANDAN MUKHERJEE | Biplab Biswas | Tarapith Filling Station | 8642071795 | | Tarapith Birbhum | 04 Sep 2017 02:30:28 PM | 04 Sep 2017 02:30:28 PM | |
| 6 | FL530 | 0002671718 | ASHOK KUMAR CHATTERJEE | Surendra pal Singh | Hamara Pump | 8953831058 | | Kanpur Kharmasi Khuda Ganj Sahajpur UP Pin Code -242305 | 04 Sep 2017 02:07:22 PM | 04 Sep 2017 02:07:22 PM | |
| 7 | FL528 | 0002661718 | SAMIR KUMAR NEOGI | Mukesh Singh | | 9073606083 | mukesh74.singh@gmail.com | | 04 Sep 2017 11:13:55 AM | 04 Sep 2017 11:08:30 AM | |
| 8 | FL527 | 0002651718 | BANNISIKHA GHOSH | Sri. Jiban Krishna Roy J B Enterprise | J B Enterprise | 9435020539 | | 76, Green Avenue, ITI By Lane, BOC Gate, Bongaigaon-783380, Assam | 02 Sep 2017 12:08:52 PM | 02 Sep 2017 12:08:52 PM | |
| 9 | FL525 | 0002641718 | SOU MEN KUMAR NEOGI | B.R.STRUCTURAL & ALUMINIUM INTERIOR'S | B.R.STRUCTURAL & ALUMINIUM INTERIOR'S | | email-brstructural@yahoo.com | DP-265, SIDCO WOMENS INDUSTRIAL PARK, KATTUR VILLAGE, THIRUMULLAIVOYAL, CHENNAI 62 | 02 Sep 2017 11:43:04 AM | 02 Sep 2017 11:43:04 AM | |
| 10 | FL523 | 0002631718 | SAMIR KUMAR NEOGI | Naresh Kumar | Naresh Kumar | 8918701659 | pabak.ghosh@nkcpt.com | | 01 Sep 2017 03:42:24 PM | 01 Sep 2017 03:42:24 PM | |

260 items in 26 pages

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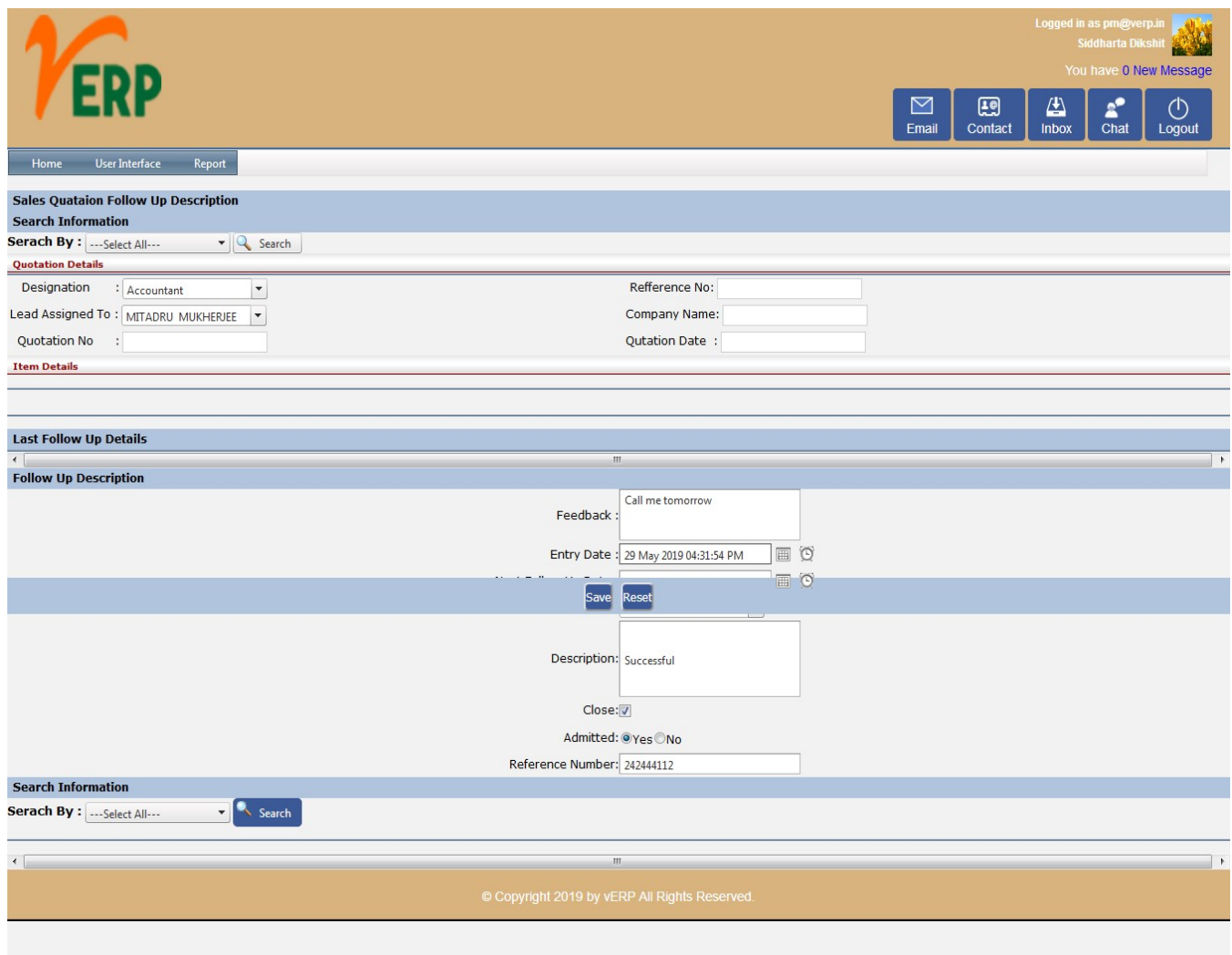
AI-67, Street No-29, Newtown, Kolkata, West Bengal, India. Zip Code: 700156
 Tel: +91-33-46023678 / 7044848888 Email: info@veherent.in GSTN: 19AACCV45444R1ZK
Your Complete Business Solution Provider



Quotation Follow Up

As a default option, send your first follow up email 2 to 3 days after sending your quote. Having multiple clients to follow up with can make it easy for those emails to slip through the cracks. Good client management software can help you avoid this by keeping track of your communication intervals for each lead.

- Click on User interface button to select the Quotation Follow Up
- To enter the Quotation Details to get the Last follow up Details
- Then input the follow up Description
- Click on "save" button to save the records
- To update a particular record, click on "✎" icon.
- To delete any particular record click on "✖" icon



Logged in as pm@verp.in
Siddharta Dikshit
You have 0 New Message

Email Contact Inbox Chat Logout

Home User Interface Report

Sales Quotation Follow Up Description

Search Information
Search By : ---Select All---

Quotation Details

Designation : Accountant Reference No:
Lead Assigned To : MITADRU MUKHERJEE Company Name:
Quotation No : Quotation Date :

Item Details

Last Follow Up Details

Follow Up Description

Feedback :
Entry Date : 29 May 2019 04:31:54 PM
Description:
Close:
Admitted: Yes No
Reference Number:

Search Information
Search By : ---Select All---

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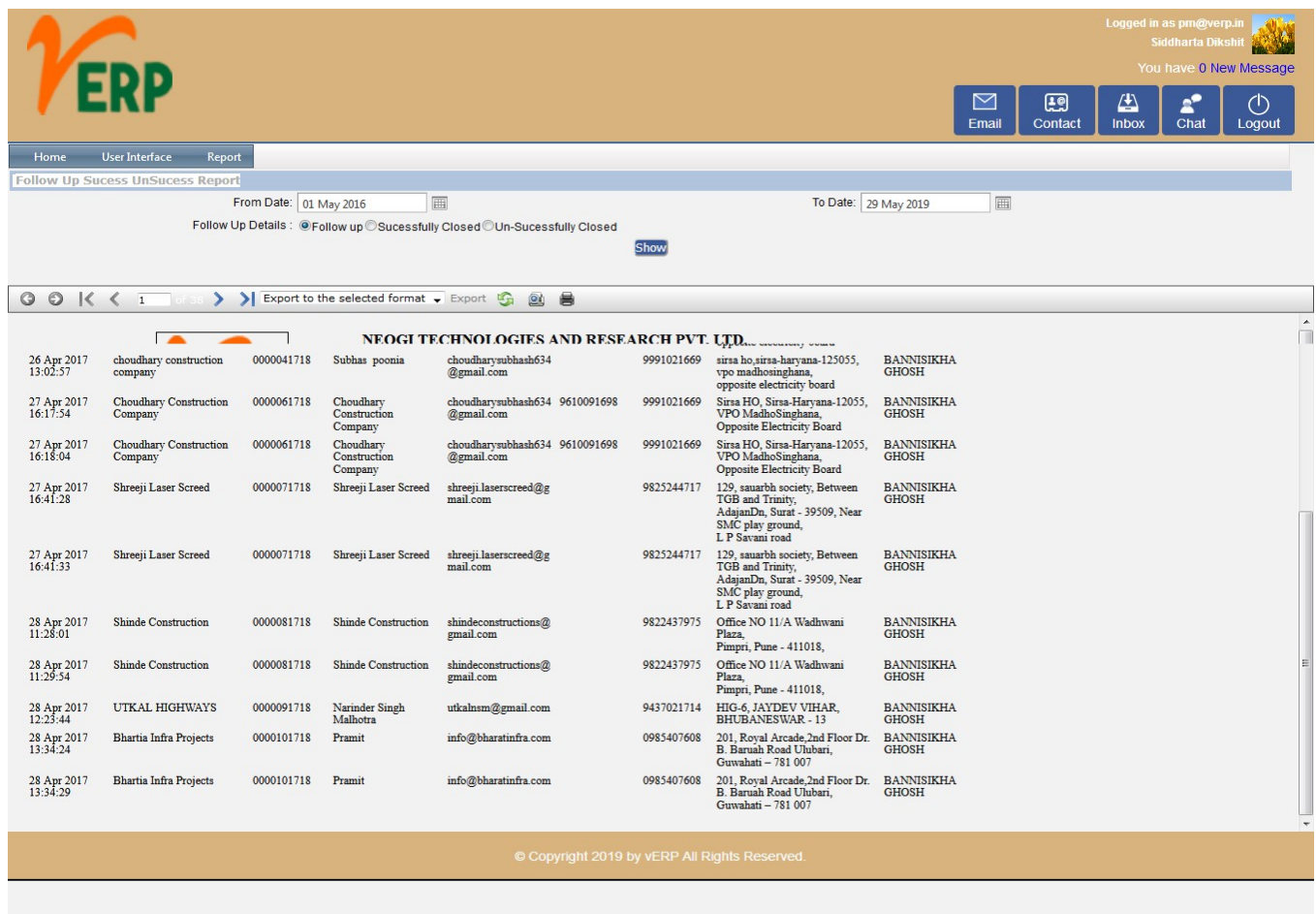
Report



Lead Follow Up Report

Lead follow up is reaching out to a lead who has previously interacted with your brand. Even though sales reps don't dread these sales calls as much as they might dread cold calling, sales people still generally regard them as difficult.

- Click on Report button to select the Lead Follow Up Report
- To Select the date range and Follow up details.
- Click on "Show" button to get the Lead Follow Up Report
- Click on "Export" button to export the report to excel



The screenshot shows the vERP web application interface for generating a Lead Follow Up Report. The top navigation bar includes the vERP logo, user information (logged in as pm@verp.in), and utility buttons for Email, Contact, Inbox, Chat, and Logout. The main content area features a report filter section with date ranges (From Date: 01 May 2016, To Date: 29 May 2019) and radio buttons for 'Follow up', 'Successfully Closed', and 'Un-Successfully Closed'. A 'Show' button is present to execute the report. Below the filter is a table with columns for date, company name, ID, name, email, phone, address, and contact name. The table contains 10 rows of data for various construction and infrastructure projects. At the bottom, there is a copyright notice: © Copyright 2019 by vERP All Rights Reserved.

| Date | Company | ID | Name | Email | Phone | Address | Contact Name |
|----------------------|--------------------------------|------------|--------------------------------|-------------------------------|------------|---|------------------|
| 26 Apr 2017 13:02:57 | choudhary construction company | 0000041718 | Subhas poonia | choudharysubhash634@gmail.com | 9991021669 | sirsa ho,sirsa-haryana-125055, vpo madhosinghana, opposite electricity board | BANNISIKHA GHOSH |
| 27 Apr 2017 16:17:54 | Choudhary Construction Company | 0000061718 | Choudhary Construction Company | choudharysubhash634@gmail.com | 9610091698 | Sirsa HO, Sirsa-Haryana-12055, VPO MadhoSinghana, Opposite Electricity Board | BANNISIKHA GHOSH |
| 27 Apr 2017 16:18:04 | Choudhary Construction Company | 0000061718 | Choudhary Construction Company | choudharysubhash634@gmail.com | 9610091698 | Sirsa HO, Sirsa-Haryana-12055, VPO MadhoSinghana, Opposite Electricity Board | BANNISIKHA GHOSH |
| 27 Apr 2017 16:41:28 | Shreeji Laser Screed | 0000071718 | Shreeji Laser Screed | shreeji.laserscreed@gmail.com | | 129, sauarbh society, Between TGB and Trinity, AdajanDn, Surat - 39509, Near SMC play ground, L P Savani road | BANNISIKHA GHOSH |
| 27 Apr 2017 16:41:33 | Shreeji Laser Screed | 0000071718 | Shreeji Laser Screed | shreeji.laserscreed@gmail.com | | 129, sauarbh society, Between TGB and Trinity, AdajanDn, Surat - 39509, Near SMC play ground, L P Savani road | BANNISIKHA GHOSH |
| 28 Apr 2017 11:28:01 | Shinde Construction | 0000081718 | Shinde Construction | shindeconstructions@gmail.com | 9822437975 | Office NO 11/A Wadhvani Plaza, Pimpri, Pune - 411018, | BANNISIKHA GHOSH |
| 28 Apr 2017 11:29:54 | Shinde Construction | 0000081718 | Shinde Construction | shindeconstructions@gmail.com | 9822437975 | Office NO 11/A Wadhvani Plaza, Pimpri, Pune - 411018, | BANNISIKHA GHOSH |
| 28 Apr 2017 12:23:44 | UTKAL HIGHWAYS | 0000091718 | Narinder Singh Malhotra | utkalnsm@gmail.com | 9437021714 | HIG-6, JAYDEV VIHAR, BHUBANESWAR - 13 | BANNISIKHA GHOSH |
| 28 Apr 2017 13:34:24 | Bhartia Infra Projects | 0000101718 | Pramit | info@bharatinfra.com | 0985407608 | 201, Royal Arcade,2nd Floor Dr. B. Baruah Road Ulubari, Guwahati - 781 007 | BANNISIKHA GHOSH |
| 28 Apr 2017 13:34:29 | Bhartia Infra Projects | 0000101718 | Pramit | info@bharatinfra.com | 0985407608 | 201, Royal Arcade,2nd Floor Dr. B. Baruah Road Ulubari, Guwahati - 781 007 | BANNISIKHA GHOSH |

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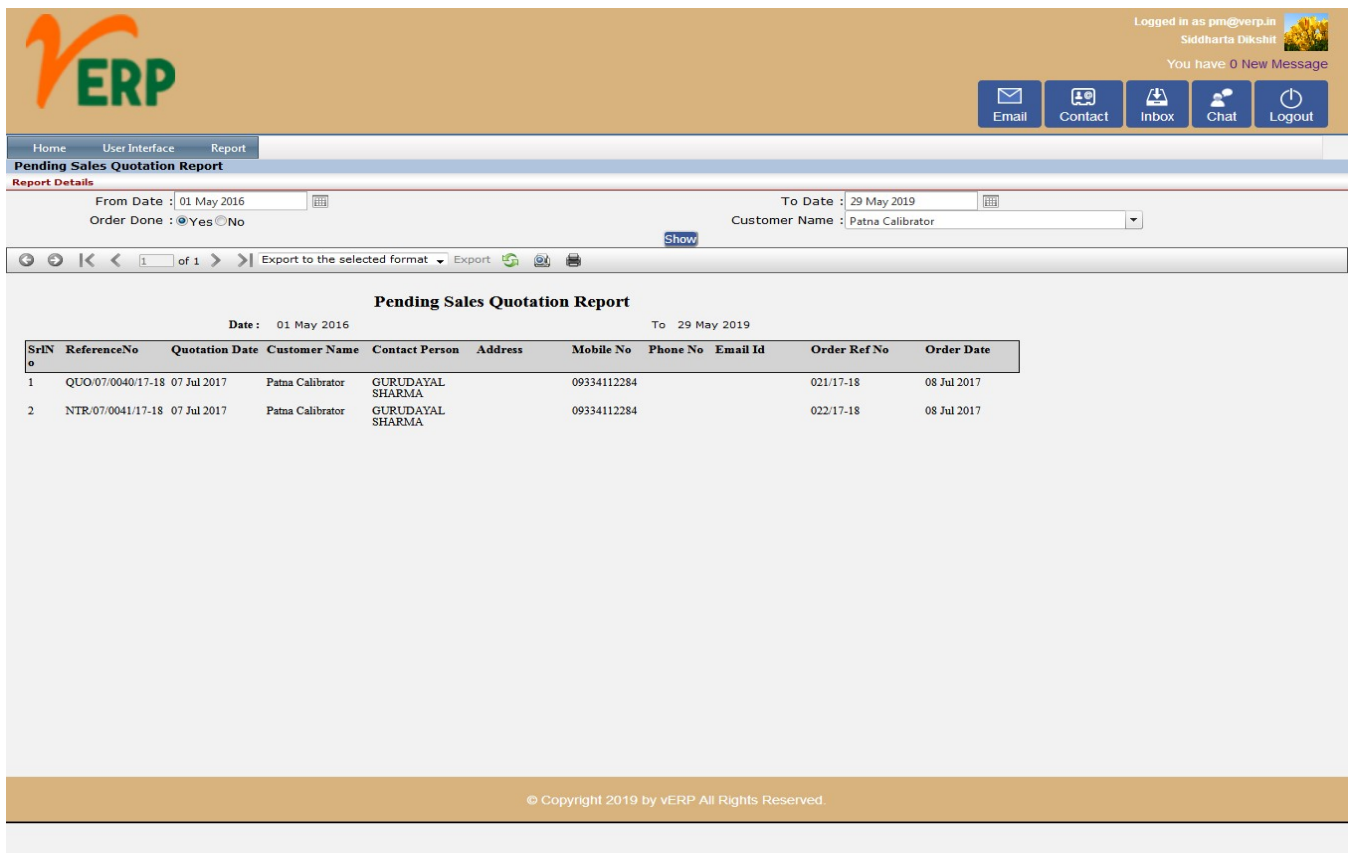
A1-67, Street No-29, Newtown, Kolkata, West Bengal, India. Zip Code: 700156
 Tel: +91-33-46023678 / 7044848888 Email: info@vehement.in GSTN: 19AACCV4544R1ZK
Your Complete Business Solution Provider



Sales Quotation Report

A quotation is a document that a seller provides to a buyer to offer goods or services at a stated price, under specified conditions. ... Also known as quotes, sales quotes, or sales quotations, quotations are used to let a potential buyer know how much goods or services will cost before they commit to the purchase.

- Click on Report button to select the Sales Quotation Report
- To Select the date range and order done, Customer Name.
- Click on "Show" button to get the Sales Quotation Report
- Click on "Export" button to export the report to excel



The screenshot shows the vERP web application interface for the Sales Quotation Report. The top navigation bar includes 'Home', 'User Interface', and 'Report'. The main content area displays the 'Pending Sales Quotation Report' with search filters for 'From Date' (01 May 2016), 'To Date' (29 May 2019), and 'Customer Name' (Patna Calibrator). A 'Show' button is visible. Below the filters is a table with the following data:

| SrIN | ReferenceNo | Quotation Date | Customer Name | Contact Person | Address | Mobile No | Phone No | Email Id | Order Ref No | Order Date |
|------|-------------------|----------------|------------------|------------------|---------|-------------|----------|----------|--------------|-------------|
| 1 | QUO:07/0040/17-18 | 07 Jul 2017 | Patna Calibrator | GURUDAYAL SHARMA | | 09334112284 | | | 021/17-18 | 08 Jul 2017 |
| 2 | NTR:07/0041/17-18 | 07 Jul 2017 | Patna Calibrator | GURUDAYAL SHARMA | | 09334112284 | | | 022/17-18 | 08 Jul 2017 |


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Sales Transaction Tracking

A sale is a transaction between two or more parties in which the buyer receives tangible or intangible goods, services, or assets in exchange for money. In some cases, other assets are paid to a seller.

- Click on Report button to select the Sales Transaction Tracking
- To Select the date range and Customer Name.
- Click on "Show" button to get the Sales Quotation Report
- Click on "Export" button to export the report to excel



Logged in as pm@verp.in
Siddharta Dikshit

You have 0 New Message

✉
Email

👤
Contact

📧
Inbox

💬
Chat

🔌
Logout

Home User Interface **Report**

Tracking Of Sales Transaction

Report Details

From Date : 01 May 2017 To Date : 29 May 2019

Customer Name : A Chandra & Co.

[Show](#)

| Sl. No. | Customer | Quotation No. | Quotation Date | Order No | Order Date | Chalan No | Chalan Date | Invoice no | Invoice Date |
|---------|-----------------|---------------------|----------------|---------------------|-------------|---------------------|-------------|------------|--------------|
| 1 | A Chandra & Co. | RefSalQut13102017/2 | 13 Oct 2017 | RefSalOrd15102017/1 | 13 Oct 2017 | RefSalCh1152017/2 | 15 Oct 2017 | | |
| 2 | A Chandra & Co. | RefSalQut13102017/2 | 13 Oct 2017 | RefSalOrd15102017/1 | 13 Oct 2017 | RefSalCh114102017/1 | 14 Oct 2017 | | |
| 3 | A Chandra & Co. | RefSalQut13102017/2 | 13 Oct 2017 | RefSalOrd13102017/1 | 13 Oct 2017 | | | | |
| 4 | A Chandra & Co. | RefSalQut12102017/1 | 12 Oct 2017 | RefSalOrd12102017/1 | 12 Oct 2017 | | | | |
| 5 | A Chandra & Co. | RefSalQut12102017/1 | 12 Oct 2017 | RefSalOrd12102017/2 | 12 Oct 2017 | | | | |
| 6 | A Chandra & Co. | QUO/09/0308/17-18 | 05 Sep 2017 | | | | | | |
| 7 | A Chandra & Co. | QUO/08/0283/17-18 | 31 Aug 2017 | | | | | | |
| 8 | A Chandra & Co. | QUO/08/0284/17-18 | 31 Aug 2017 | | | | | | |
| 9 | A Chandra & Co. | QUO/08/0285/17-18 | 31 Aug 2017 | | | | | | |
| 10 | A Chandra & Co. | QUO/08/0288/17-18 | 31 Aug 2017 | | | | | | |

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