G CORP GROUP

Issues and Problems:

- Gcorp group has 3 Projects in South Region, each Project have different Construction like Apartments Villas, here there is no tracking system of how much 'Discounts' they have given and who Approved.

- Customer 'Follow-ups' is going through Phone/Email, in that. Management level they couldn't able to Track the Follow-ups from the Sales Users.

- Before Releasing a Payment They Should Require Particular Managers Approval Signature Date here Marketing user have to go the manager and taking the Signature.

- Here they Spend the Amount for advertisements, particular advertisement how many leads come whether he is buy an apartment or not, these details they couldn't no monthly quarterly based on the lead count they can spend more amount on that advertisement., this process is not happening here.

- There is no Order (Purchase order, Release order, and work order) tracking mechanism.

- There is no Lead tracking system when the new lead comes in to Gcorpgroup.

- There is no visibility of Primary Customer, Secondary Customer, Agent, Broker, Commission details & Apartment(that buys from the Customer) details& payment Installment Amount details.

Solutions and Recommendations:

✓ Here we have Segregated each project and we have given the size limit for level of approver and created the approval process and email notifications for each & every Project.

✓ Instead of Tracking Follow-ups through Email or Phone Created a daily_Followup_Report and scheduled it to particular management level.

✓ Here we have created a Customized Salesforce Page for automated Signature and along with Dates whenever they approve before releasing any Payments.

✓ Here we are following certain Mechanism for Campaigns leads Accounts, so that we can track the count of which lead comes through which advertisement and make it as an effective Salesforce Dashboard.

✓ With Salesforce Relationships we can track all the Information in one single detail Page.

Making it mobile first:

Recognizing the importance of moving quickly in a short, high contact sales environment, Gcorp group built an entire suite of mobile-optimized apps—including digital sales aids, Order Manage and Payment—on Salesforce1 Platform. Along with the Salesforce1 Mobile App, Reps now can do everything from raw materials management, to vendor management, to order and payment tracking on their tablets.

Challenges:

CRM Heads will have below challenges:

• Whenever the ServiceTax&VAT Changes the Calculations will automatically Change based on the Current calculation(payment will done in installment for that we created tax master where we can track all the ServiceTax&VAT tax details for all projects.)

• When the Customer Pays an Second Installment Amount, in that Booking Amount should Deduct &E-stamping Charges will be add it into 2ND Payment (Here we have used formulas for the Second Installment Amount Record and it varies Project-wise)

- All the Apartment Cost Details & Installment Amount details should show in One Page and send the PDF Page the Management (for this we have created Customized Salesforce page, it includes all the details and whenever the installment amount done the automated PDF mail will goes to concern People)

Sales Heads will have below challenges:

- For 'Quick Lead Process' Created Customized Pages so that it'll not take much of their time in feeding data.

- Automated lead assignments so that whenever the new lead comes it'll go and save the record under particular project Sales user for that they'll track further information from the Customer.

Feedback from the Sales&Marketing Head:

By using Salesforce Work can be done Easily and track Inventory & Orders & Leads data & Expenses & All the Customer Details & Project(Apartment&Villas) Calculation Details.

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