



Rental Management Solutions



نظام علاقات الزبائن
Customer Relationship Management



M01



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نظام علاقات الزبائن Customer Relationship Management

The Customer Relationship Management module is one of the core modules of the iHire Software®.

iHire Software CRM combines both vendors and customers in one screen because most vendors eventually become customers and many customers become vendors.

iHire Software CRM give users real time comprehensive information about a customer/ vendor address, contact details, business type, customer class, Commercial registration or personal identification details.

The system maintains the information related to a customer's employees who have represented their company.

Customer (Customer Information)

Cust. Belong to : altham Hasan Ali A. Mohzi, Ebrahim Ahmed

Customer CR/CPR : C000459501 Code Type : True

Customer Name : G.P. ZACHERIADES (OVERSEAS) LTD.

Vendor : No View Cus. Type Credit Title M/S

Address Information

Flat : 34 Building : 2534

Road : 555

Block # : 3008 Town : WADIYAN

PO Box : 5832 Country : BAHRAIN

Remarks :

Email : info@gpzggroup.com, k.abbedi@gpzggroup.com, k.mohzi@gpzggroup.com

Website :

Credit Limit : 15000.000 C. Period : 30 DAYS

Phone # : 17598800,17732197,36059900

Fax # : 17598801,17735763,17459433,17730383,17593197,1782841

Business Type : 452001 | General Contracting.

Class : C - First Time/ Average (Cash/ Limited Credit)

CR Information

Reg. Date : 18/01/1978 Expiry Date : 18/01/2013

Nationality : Cypriot

Total Cnts : 1852 Rem Cnts : 28 Remaining Contracts

Active

Employee Information

Employees (69) Customer Notes (75) Hiring History (20) Fax (47) Quotations (39)

Fax Type :

Type of Fax	Date	Attention	Close	Close By	Close Date
Enquiry 184570	19/06/2013	Sales-	Yes	Irshad Karim	2013 08:10:36
Enquiry 1304-21-32994	11/05/2013	Sales-			
Enquiry 1304-21-32994	07/05/2013	Sales-			
Quotation Request 1303-21-30374	01/04/2013	Sales-	Yes	Kamrul Hasan	2013 09:08:44
Enquiry 1303-21-30374	30/03/2013	Sales-	Yes	Kamrul Hasan	2013 09:10:48
Enquiry 1301-21-30302	12/01/2013	Sales-	Yes	Hithesh	2013 12:21:59
Enquiry 1312-21-46823	27/12/2012	Sales-	Yes	Irshad Karim	2012 11:42:02

02/09/2013 10:19

Credit Control

The authorized system users can set/ change the customer's credit limit and credit period after viewing the customer's information, hiring and payment history.

The credit control system checks the pre-set credit limits, outstanding invoices and un-billed contracts to inform the sales staff at the time of making new contracts.

The credit control system holds the delivery when the credit limits are exceeded and a managerial approval will be required before the delivery is possible.

NASS ASPHALT

- Running Contracts (1)
- Outstanding Contracts (10)
 - T101337 Balance : 169.932
 - T101766 Balance : 933.888
 - T101767 Balance : 571.248
 - T97250 Balance : 1955.884
 - S08085 Balance : 985.000
 - S08440 Balance : 40.000
 - S08124 Balance : 3718.751
 - S08125 Balance : 493.750
 - S08142 Balance : 495.000
 - S08212 Balance : 170.000
- Old Contracts
- Unpaid Invoices (24) T.Amount = 21221.999
 - DATE : Apr 2 2012 NO : B113004 AMOUNT : 900.001
 - DATE : Sep 22 2012 NO : B123837 AMOUNT : 200.916

Notes : CREDIT CONTRACTS MUST BE WITH LPO. / REQUISITION

Total Paid :

Customer Class : C - First Time/ Average (Cash/ Limited Credit)
Credit Limit : 20000 Used : 35548.613 (177.74%) **[Credit Limit Exceeded]**
Credit Period : 60 DAYS **Exceeding By 503.33% ! Please Inform Credit Controller**
Employee Class :
Employee Allow Type :

Ok Print Customer Contracts Fax Customer Statment Calculate Credit Limit

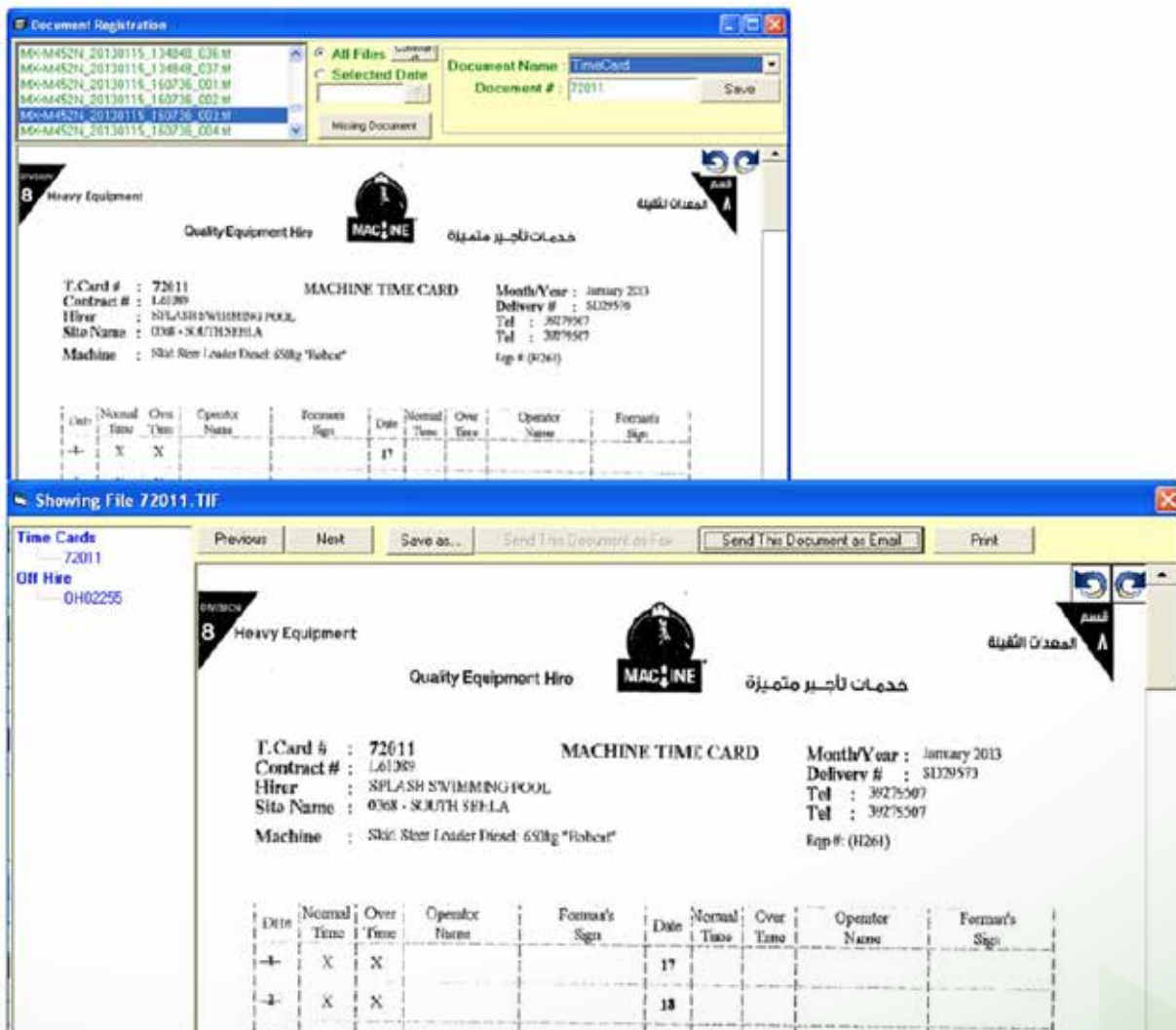
Integration

The CRM is fully integrated with the Document Management System to show copies of customer's commercial registration or Personal identification. It also shows all sent/ approved quotations, and incoming emails/ faxes.

The CRM is fully integrated with the Rental Management Module. The system users can view and follow up the entire customer's running contracts and view the customer's hiring history.

The CRM is fully integrated with the Invoice and Payment Module. The system users can view and follow up the customer's outstanding invoices and view the customer's payment history.

The system has a feature to assign a single or multiple staff to maintain the customer relationship profile. The customers reports and follow up portals are available to the designated staff.



Reports

- List of the un-allocated customers.
- List of the expired CR/ CPR.
- List of the remaining contracts for a customer.
- List of the pending deliveries for managerial review.
- Review managerial action.

Applicable businesses:

This module is suitable for any equipment, car rental, and leasing companies. It can be used by companies having multiple business divisions, branches in multiple cities, and countries.