

CASE STUDY



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Application Background

- The application is an extension of web based CRM designed and developed exclusively for Installers/ Surveyors & the Sales Representatives

Highlighting Features

The major features of the application include:

- View all appointments assigned to the Sales Representatives
 - With filter option of Day, Week or Month.
 - With filter option of status like In Progress, Completed & Cancelled.
- View Telesales prospect records with filter option of user permissions.
- The information entered through the questionnaire synchronizes with the Bright Office CRM and will be viewable against the Prospect or Customer.

Technology used

- iOS 7.1
- Xcode 6.3
- JSON

Application Details

The Problem

Bright Office approached 200OK Solutions to develop the application where Sales Representative can book appointment with the prospects. The iPhone application is replicated from the Windows version which was already developed. The questionnaire is dynamic in nature and it gets retrieved from the server along with the drop down menus “yes” and no”.

The Solution

Bright Office wanted the exact replica of the Windows application in iPhone which 200OK Solutions executed successfully. The API's were developed and a new UI was designed by 200OK Solutions to give it a professional feel. Apart from the others mentioned above, additional features of the Bright Office Application Includes:

- View Customer records with filter option of user permissions.
- Ability to create new prospects in the Bright Office CRM.
- Ability to complete questionnaire with business form status based on relevant questionnaire assigned to the customer type.
- Ability to take photos through iPhone camera which in turn synchronizes with the CRM.
- Ability to set milestone buttons displayed on application to enable the sales representative to view the prospecting levels at various stages.



