


CASE STUDY



CRM- Maintenance



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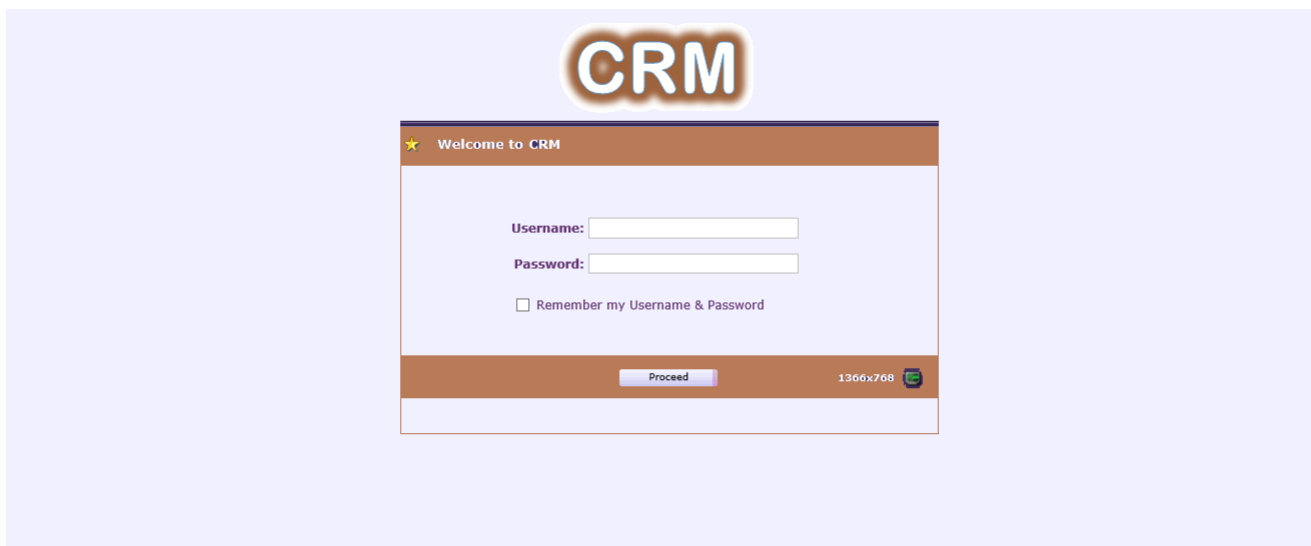
Application Background

- This is a web based CRM applications developed for four major categories as:
 - Cases
 - Training
 - Business
 - Green0Deal Eco
- Each hosting of the CRM is a unique setup of one of the above four categories.
- There are few common modules among these categories like Customers, Tasks etc.

Highlighting Features

Major features of the application include:

- Separating focuses on the right clients through dynamic database, which gives a chance to advertise administrations in the best way, whether by means of Email, Post or SMS.
- Reporting is vital for any business to pick up a comprehension of what works and what doesn't. Application's reporting suite permits to write about any or numerous database fields.
- Ability to prepare and persist performance reports of the company defined learner-delegates with few clicks and an optional exports to Excel or PDF.
- Adequately deal with assessors, installers and establishments with intense employment administration at the center of the product.
- Consistent, two-way exchange of appraisal solicitations, finished evaluations and all related documentation with field based DEAs and GDAs.



CRM

Customers

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Created	Code▲	Name	Town	County	PostCode	Telephone	Status	Task Logging	Balance
17-09-2013	C000287	Royal Bank of Scotland	Warrington	Cheshire			Customer	07-May-2015 (training.crm) ✓	
25-10-2013	C000288	Emma Peterson	Newton-Le-Willows	Merseyside			Customer	29-Nov-2013 (test user) ✓	
28-10-2013	C000289	Warrington Collegiate	Warrington	Cheshire			Customer	07-Dec-2015 (training.crm) ✓	
09-01-2014	C000291		Newton-Le-Willows	Merseyside			Customer	06-Feb-2015 (training.crm) ✓	
27-01-2014	C000295	Maisy Boris	Liverpool	Merseyside			Customer	06-Feb-2015 (training.crm) ✓	
31-01-2014	C000297	Severn Trent Water	Coventry	Warwickshire			Customer	06-Feb-2015 (training.crm) ✓	
26-03-2014	C000301	Ben Francis	Ellesmere Port	Cheshire			Customer	06-Feb-2015 (training.crm) ✓	
07-05-2014	C000302	Ben Spencer	Ellesmere Port	Cheshire			Customer	06-Nov-2014 (training.crm) ✓	
07-05-2014	C000303	Ben Smith	Ellesmere Port	Cheshire			Customer	06-Feb-2015 (training.crm) ✓	
08-05-2014	C000304	Jimmy Jones	Ellesmere Port	Cheshire			Customer	06-Feb-2015 (training.crm) ✓	

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Cases | Menu

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Case Ref.	Date Created▼	Customer	Initial Fee	Case Handler	Case Owner	Matter Type	Provider	Status	Provider Ref.	Tasks	Task Type	Days Old
CA150911	04-12-2015	Matt George				Mis-Sold	Yorksh	FINANCIAL TAB			Complete	
CA150910	25-11-2015	Craig Mclean				Mis-Sold	CitiFi	CLIENT AWAITING PAYMEN			Complete	
CA150909	25-11-2015	Debora Robins				Mis-Sold	CitiFi	CLIENT AWAITING PAYMEN				
CA150908	25-11-2015	David Foulge				Mis-Sold	CitiFi	CLIENT AWAITING PAYMEN				
CA150907	18-11-2015	Samant Staggs				Mis-Sold	CitiFi	CLIENT AWAITING PAYMEN			Complete	
CA150906	12-11-2015	Neil Reeve				Mis-Sold	CitiFi	AWAITING CLIENT INFO -			Complete	
CA150905	12-11-2015	Stuart Noel				Mis-Sold	CitiFi	AWAITING CLIENT INFO -			Complete	
CA150904	02-11-2015	Lee Hewis				Mis-Sold		CLIENT AWAITING PAYMEN			Complete	
CA150903	18-08-2015	Alfred Dorrel				Mis-Sold	Nation	AWAITING FOS DECISION			Complete	
CA150902	18-08-2015	Alfred Dorrel				Mis-Sold	Nation	AWAITING FOS DECISION			Complete	

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Training

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Code▼	Course Description	Course Date	Days	Availability	Total Net Amount	VAT Amount	Invoice Total	Course Status	Customer Name	Trainer Name	Course Venue
TC000491	Asbestos Awareness	24-12-2015	2	5	0.00	0.00	0.00	Provisional Course			Thistle Hotel
TC000489	CISRS BASE Genlok	29-12-2015	2	9	0.00	0.00	0.00	Provisional Course			
TC000487	CISRS BASE Genlok	10-12-2015	7	9	0.00	0.00	0.00	Provisional Course			
TC000484	Asbestos Awareness	17-12-2015	2	3	1,200.00	175.00	1,050.00	Provisional Course		James Kellett	
TC000483	Asbestos Awareness	01-12-2015		5	0.00	0.00	0.00	Provisional Course		Josh Peake	
TC000482	Asbestos Awareness	30-11-2015		5	0.00	0.00	0.00	Provisional Course	Ben Francis	Multiple	
TC000481	Asbestos Awareness	01-12-2015		5	0.00	0.00	0.00	Provisional Course	Aaron Peake		
TC000480	Asbestos Awareness	22-12-2015	1	0	975.00	130.00	780.00	Provisional Course			
TC000465	1 Day Skills Test Contur	18-11-2015	2	-1	975.00	0.00	650.00	Completed			Longbridge, Warwick
TC000464	Asbestos Awareness	24-11-2015	1	1	325.00	65.00	390.00	Completed		Multiple	

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Technologies used

- Microsoft .net 4.0 with vb.net
- ADO.Net 2.0
- SQL Server 2012

Application Details

The Problem

Client has a CRM developed in 2007 with an older stack of .Net technologies. They wanted to address the major issues in the application along with the enhancements lined up. They approached 200Ok solutions to maintain this CRM application and help them sustain their existing customer base.

The Solution

200Ok Solutions offered a well-defined execution and maintenance plan for this project as below:

- Formed a small development team initially with a team lead to mentor the team.
- Environment setup, relevant to the client application, for the local development team.
- Scheduled sessions for functional as well as technical knowledge transfer of the existing application.
- Task allocation through a tracking application.
- Cumulative status reporting of task allocation on weekly and monthly basis.

Below are the activities involved in the maintenance of the project.

- Error tracking and debugging
- Version upgrades
- Version enhancements
- Technical troubleshooting
- Performance monitoring and enhancements
- Documentation development and maintenance.