

# **MARKETING MANAGEMENT**

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# Chapter 1:About Marketing Module

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## **A.Background**

On the front line between builders and their customers, competition has never been fiercer. In the past, strategies for improving corporate profitability and competitiveness have shifted from finance focused, to operations focused methods, on marketing focused.

These methodologies are new to the construction Industry. It was a seller's market for many years, which is gradually shifting to the buyers market. It is the time we understand these changes and take corrective actions in time.

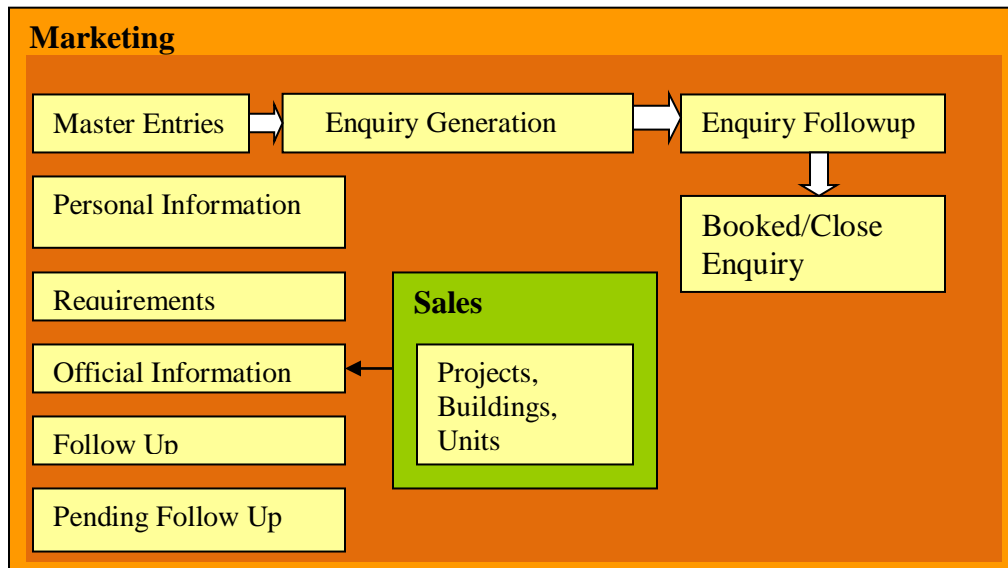
Highrise proposes that all the enquires coming to us should be recorded; the recorded data should be easily accessible and easy to analyze. We should attempt to capture maximum information possible for each enquiry, which subsequently would be useful when we are launching new projects.

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Before beginning this, you should be able to:

- Computer proficiency and windows awareness.
- Knowledge of marketing process in Construction Industry.
- Marketing department must have a general idea about what is ERP and how it functions.

## Work Flow Diagram of Marketing Module



*Fig 1.1 Marketing Work Flow Diagram*

## External Modules Dependency

Module Name	Related Department	Marketing Form Name	Explanation
Sales	Sales Dept.	Official Information	Marketing executives can connect to Sales module and check the unsold and temporary booked flats. Projects, Buildings, Units defined in Sales used in marketing for customer preferences.

# CHAPTER 2: DATA RELATED ENTRIES IN MARKETING

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The first and foremost part in marketing is to create data elements that subsequently used while gathering information. Masters are classified as follows,

Those Entries those are entered once and used throughout the process are called as *Masters*. For e. g. Budget once entered can be used for all enquiries.

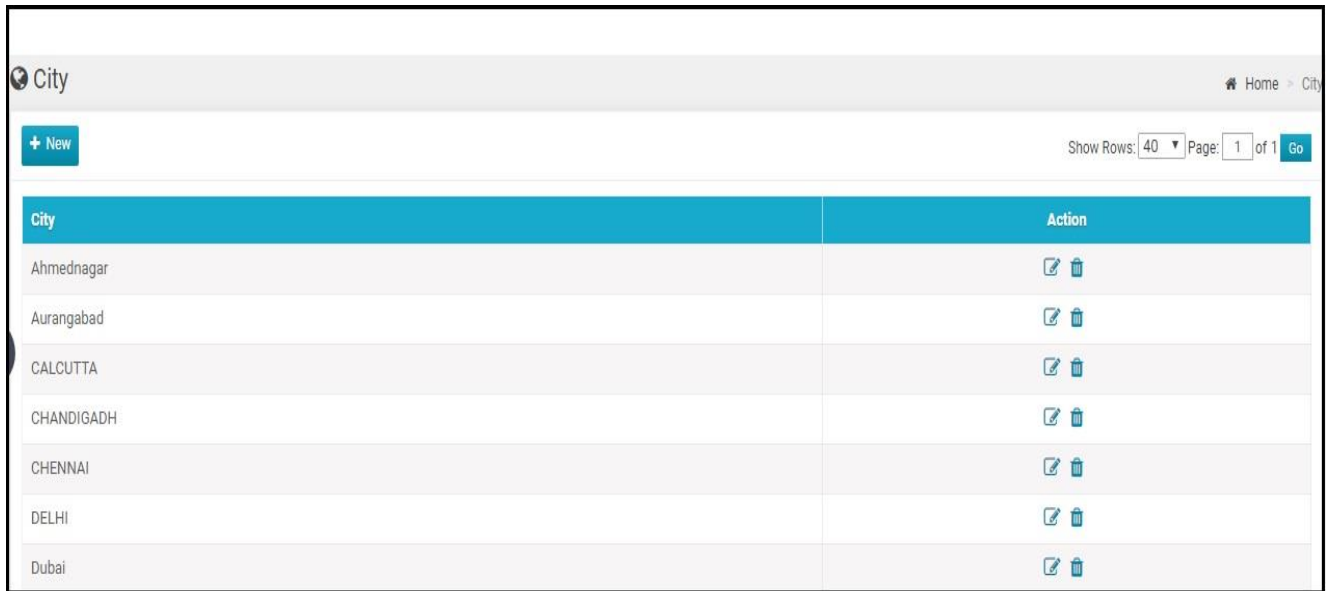
*Note: Before making entries, naming conventions i. e. upper case, title case must be decided by all the users.*















Note: While entering master entries first click on *Add* button, then feed that data and click on the *Save* button. In all windows *Delete* facility is provided. This procedure is applicable to all entries.

## **A. Masters related to Personal Information**

Personal information is essentially important while communicating with the customer. While feeding customers' data following masters should created as,

## A.1 City Name Master



City	Action
Ahmednagar	 
Aurangabad	 
CALCUTTA	 
CHANDIGADH	 
CHENNAI	 
DELHI	 
Dubai	 

Path->Master->City

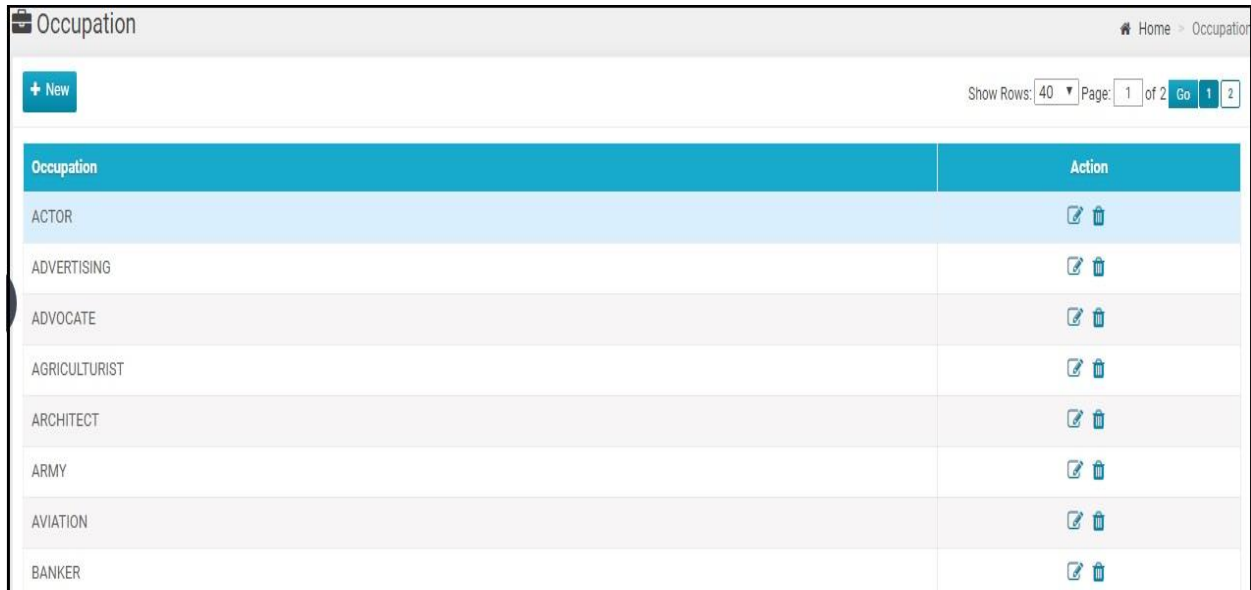
**Delete** –This master record will not delete if used in other transactions (Enquiry, Customer, etc).

**Modify** - If record is already used in other transactions (Enquiry, customer, etc), then new caption should be relevant to old description, to avoid further confusion.

















**New** – Do not put duplicates. Avoid to put special characters and number.

## A.2 Occupation

It captures the information regarding a customer's occupation at the workplace like Doctor, Engineer, Teacher, Manager, Professor etc.



The screenshot shows a web application interface for managing 'Occupation' records. At the top left, there is a '+ New' button. At the top right, there is a breadcrumb 'Home > Occupation', a 'Show Rows: 40' dropdown, a 'Page: 1 of 2' indicator, and 'Go 1 2' buttons. The main content is a table with two columns: 'Occupation' and 'Action'. The table lists various occupations, each with a corresponding 'Action' column containing edit and delete icons.

Occupation	Action
ACTOR	 
ADVERTISING	 
ADVOCATE	 
AGRICULTURIST	 
ARCHITECT	 
ARMY	 
AVIATION	 
BANKER	 

Path->Master->Occupation

**Delete** –This master record will not delete if used in other transactions (Enquiry, Customer, etc).

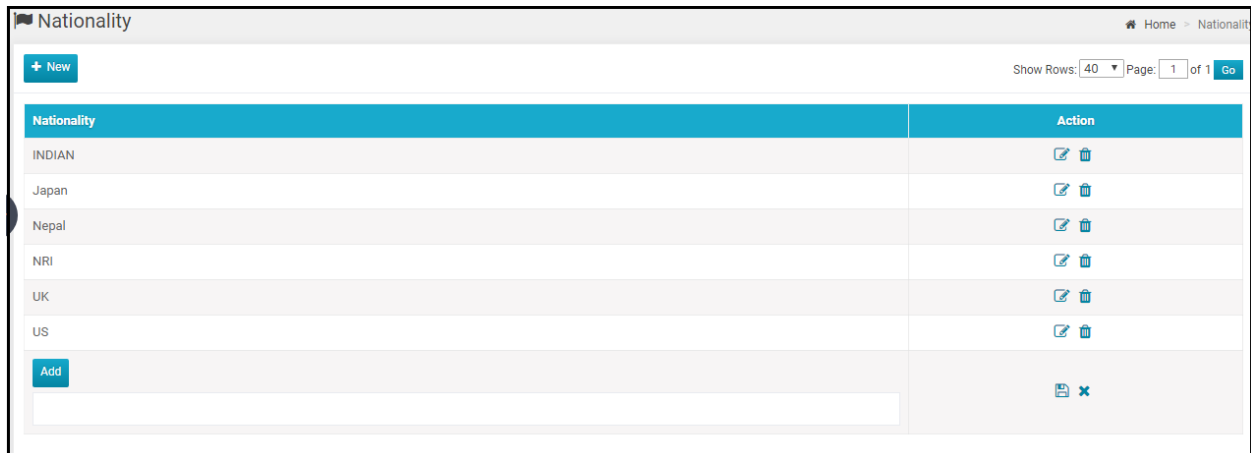
**Modify** - If record is already used in other transactions (Enquiry, customer, etc), then new caption should be relevant to old description, to avoid further confusion.

**New** – Do not put duplicates. Avoid to put special characters and number.

















## A.1 Nationality (Country)

Nationality of Customer may be Indian, NRI (Non Resident Indian), American, UAE, UK, US, Shri Lankan, etc.



The screenshot shows a web application interface for managing Nationality records. At the top, there is a breadcrumb trail 'Home > Nationality' and a '+ New' button. Below this is a table with two columns: 'Nationality' and 'Action'. The table contains six rows of data: INDIAN, Japan, Nepal, NRI, UK, and US. Each row has two icons in the 'Action' column: a pencil (edit) and a trash can (delete). At the bottom of the table, there is an 'Add' button and a row with a trash can icon and an 'x' symbol. The interface also includes a pagination control showing 'Show Rows: 40', 'Page: 1 of 1', and a 'Go' button.

Nationality	Action
INDIAN	 
Japan	 
Nepal	 
NRI	 
UK	 
US	 
<input type="text"/>	 

Path->Master-> Nationality

**Delete** – If record is used in Nationalty on other Program, cannot delete it.

**Modify** - If record is used in the Nationalty, then new caption should be related to old caption, to avoid further confusion.

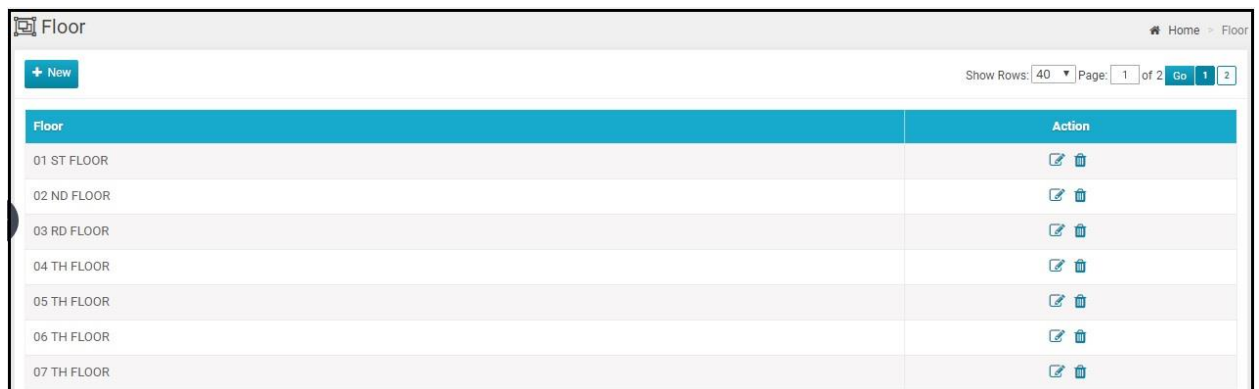
**New** – It will not accept duplicate name.















## B. Masters related to Product Requirements

In marketing, the most crucial information is what customers exactly want. This data play a vital role in analysis. Followings elements capture data related to customer's product related requirements.

### B.1 Floor

Floors are defined as Parking, Ground floor, First floor and so on.



Floor	Action
01 ST FLOOR	 
02 ND FLOOR	 
03 RD FLOOR	 
04 TH FLOOR	 
05 TH FLOOR	 
06 TH FLOOR	 
07 TH FLOOR	 

Path->Master->Floor

**Delete** – If record is used in Floor on other Program, cannot delete it.

**Modify** - If record is used in the Floor, then new caption should be related to old caption, to avoid further confusion.


**New** – It will not accept duplicate name.

## B.2 Room

It will take the specifications like 1BHK, 2BHK, 3BHK etc.



The screenshot shows a web interface for managing rooms. At the top, there is a '+ New' button and a pagination control showing 'Show Rows: 40', 'Page: 1 of 2', and 'Go' buttons for pages 1 and 2. Below this is a table with the following data:

Rooms	No of Rooms	Action
1 BHK	3	 
1BHK	0	 
1BHK+Terr	1	 
1BHK/2BHK	0	 
1BHKT	0	 
1RK+Terr	1	 
1RKT	1	 
2 BHK	1	 
2BHK	0	 

Path->Master->Room





















**Delete** – If record is used in Room on other Program, cannot delete it.

**Modify** - If record is used in the Room, then new caption should be related to old caption, to avoid further confusion.

**New** – It will not accept duplicate name.

## B.3 Locations

Sometimes projects go at different locations, so preferences are taken from customer from different locations for future follow-ups.

Location	City	Action
ALTAMOUNT ROAD	Select	 
ANDHERI	Select	 
ANDHERI-E	Select	 
ANTOP HILL	Select	 
Any other	MEERUT	 
BADLAPUR	Select	 
Bahrain	Select	 
BANDRA	MUMBAI	 
BANDRA-E	Select	 
BANDRA-W	Select	 

Path->Master->Locations

**Delete** – If record is used in Location on other Program, cannot delete it.

**Modify** - If record is used in the Location, then new caption should be related to old caption, to avoid further confusion.

**New** – It will not accept duplicate name.

## B.4 Budget





















In Budget specify approximate range of financial budget of customer.

Budget

Home > Budget

+ New

Show Rows: 40 Page: 1 of 2 Go 1 2

Budget	Action
1-4 LACSS	 
1.5 cr and above	 
10-20 Lacs	 
101-150 Lacs	 
11-15 Lacs	 
12-18 Lacs	 
151-200Lacs	 
16 TO 30 LACS	 
16-20 LACS	 
16-20Lacs	 

Path->Master->Budget

**Delete** – If record is used in Budget on other Program, cannot delete it.

**Modify** - If record is used in the Budget, then new caption should be related to old caption, to avoid further confusion.

**New** – It will not accept duplicate name.

## C. Masters related to Official Information

For office documentation purpose some things should be noted down after enquiry which comes under official information. Following factors comes into the picture while noting official information.

### C.1 Broker Master

Capturing broker or reference information is equally important because we can oblige people who are giving our references and increasing sale to reach towards the target. We need to pay some amount to these persons as a reward.

The screenshot shows a web application interface for managing broker details. On the left, there is a sidebar with a tree view of categories, including '12345', 'Broker Agency Pvt Ltd', 'Broker Level', 'Cat 1', 'Commercial', 'DELHI', 'Individual', 'INDIVISUAL', 'mangesh broker', 'Mixed', 'Mumbai RNA', 'mumbai Rna', 'NA', 'New 2016', 'New Broker', 'New Category', 'Prakash Jha & Associates', 'Residential', 'Residential & Commercial project', 'Test', 'Upstock', and 'Zerodhaa'. A plus sign icon is visible at the top of the sidebar. The main content area is titled 'Broker Details' and contains a form with the following fields:

- Upload Photo:** A button labeled 'Upload'.
- Name:** A text input field.
- Father's Name:** A text input field.
- Spouse Name:** A text input field.
- Gender:** Radio buttons for 'Male' (selected) and 'Female'.
- Birth Date:** A date picker field showing '01/01/1900'.
- Employee:** A dropdown menu.
- PAN No:** A text input field.
- Marital Status:** A dropdown menu.
- Address:** A text input field.
- Location:** A dropdown menu.
- Phone Nos.:** A text input field.
- Email:** A text input field.
- Broker's Date:** A date picker field showing '01/01/1900'.
- Source of Information:** A dropdown menu.
- Agency:** A text input field.
- City:** A dropdown menu.
- Identification Code:** A text input field.
- Mobile:** A text input field.

Path->Master->Broker Master

In Broker Master includes information on Broker Name, and Other Related Basic Information for saving Broker Master. By click on +Plus Symbol create a new Broker with blank data after the Enter Broker data Save Broker to shown Left Tree under.

## C.2 Employee Master

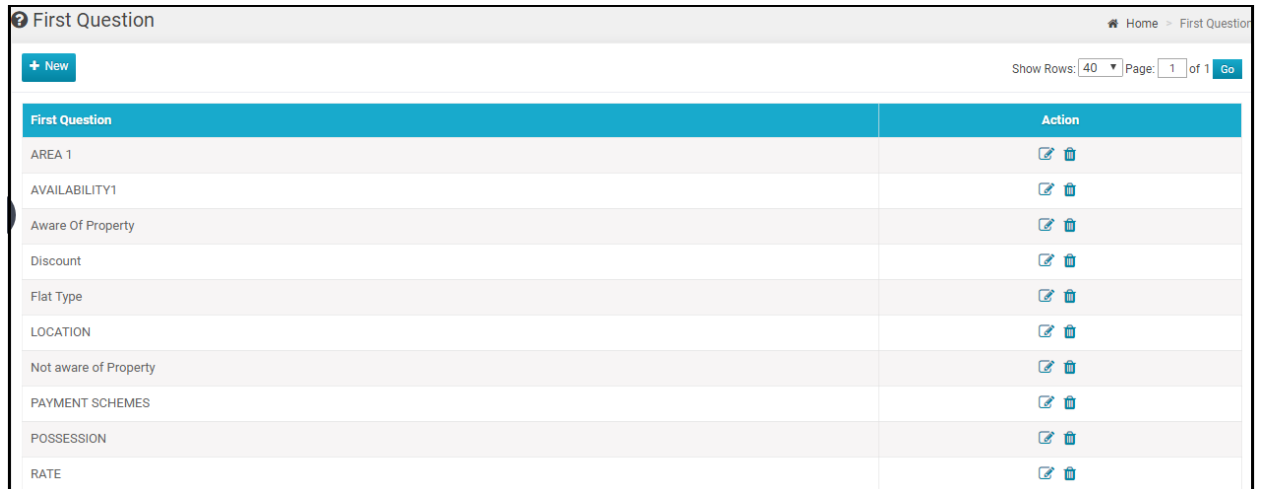
For every customer one marketing executive is assigned who gives detailed information asked by the customer. Marketing executive is responsible for effectively handling this and give complete satisfaction and convert the case into a sale. This can use for performance analysis of executives.

Path->Master->Employee Master
















In Employee Master includes information on Employee Name, and Other Related Basic Information for saving Employee Master. By click on +Plus Symbol create a new Employee Master with blank data after the Enter Employee data Save Employee to shown Left Tree under all Employee

### C.3 First Question

The first question asked by the enquiry could a rough indication of the decision-making inclination of a particular person. First question could be rated, payment schemes, possession, etc. Each company will need to frame their own first question analysis mechanism.



The screenshot shows a web application interface for 'First Question'. At the top, there is a breadcrumb trail 'Home > First Question' and a '+ New' button. Below this, there is a table with two columns: 'First Question' and 'Action'. The table contains ten rows, each representing a different category. Each row has a blue pencil icon for editing and a blue trash can icon for deleting. The categories listed are: AREA 1, AVAILABILITY1, Aware Of Property, Discount, Flat Type, LOCATION, Not aware of Property, PAYMENT SCHEMES, POSSESSION, and RATE. The table also includes a 'Show Rows: 40' dropdown, 'Page: 1 of 1', and a 'Go' button.

First Question	Action
AREA 1	 
AVAILABILITY1	 
Aware Of Property	 
Discount	 
Flat Type	 
LOCATION	 
Not aware of Property	 
PAYMENT SCHEMES	 
POSSESSION	 
RATE	 

Path->Master->First Question

**Delete** – If record is used in the First Question on other Program, cannot delete it.

**Modify** - If record is used in the First Question, then new caption should be related to old caption, to avoid further confusion.

**New** – It will not accept duplicate name.

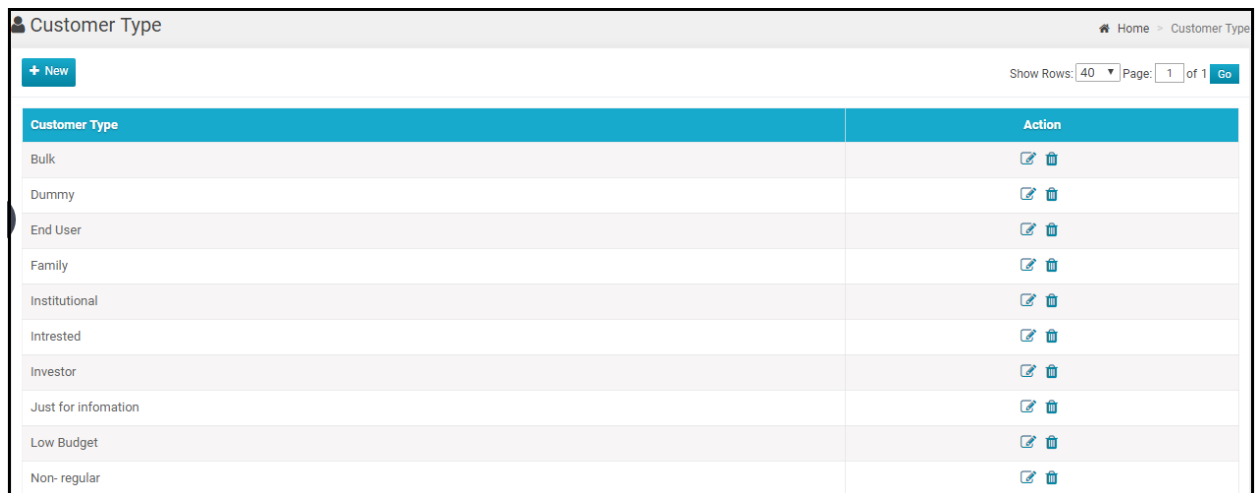






















## B. Masters related to Follow Up Information

Enquiry handing is not the end of the story, follow up for each customer has to be done and noted down anywhere in the system for reference. Following factors helps in capturing data related to follow up.

### D.1 Customer Type

Each company will need to classify the customers as Serious, Time Passer, Competitor, etc. Treatment for closure of cases for each type of customer could frame differently to extract maximum results.



Customer Type	Action
Bulk	 
Dummy	 
End User	 
Family	 
Institutional	 
Intrested	 
Investor	 
Just for infomation	 
Low Budget	 
Non- regular	 

Path->Master->Customer Type

**Delete** – If record is used in Customer Type on other Program, cannot delete it.


**Modify** - If record is used in the Customer Type, then new caption should be related to old caption, to avoid further confusion.

**New** – It will not accept duplicate name.





















## Final Result

After making follow-ups to the customer, he either will agree to buy the property or may deny due to some reasons. So the final result could be converted to sale, Sale Postponed etc.

To reach to this window, click on the Other Information tab, select Other Information, then select Final Results. Further procedure is same.



The screenshot displays the 'Final Result' application interface. At the top, there is a breadcrumb trail: 'Home > Final Result'. Below this, there is a '+ New' button and a pagination control showing 'Show Rows: 40', 'Page: 1 of 1', and a 'Go' button. The main content is a table with two columns: 'Final Result' and 'Action'. The table contains the following rows:

Final Result	Action
-- Select / Follow Up --	 
A1	 
BOOKED	 
BOOKED ELSE WHERE	 
Booking Done	 
BROKER	 
DID NOT LIKE THE LOCATION	 
DID NOT LIKE THE PROJECT	 
DND Number	 
Enquiry Closed	 

Path->Master->Final Result

**Delete** – If record is used in Final Result on other Program, cannot delete it.

**Modify** - If record is used in the Final Result, then new caption should be related to old caption, to avoid further confusion.

**New** – It will not accept duplicate name.

# CHAPTER 3: ADVERTISEMENT

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We spend our marketing budget on various activities, which yield us numerous tangible & non-tangible advantages. Tangible advantages need to be evaluated carefully. It is important for us to know reach of each marketing exercise we undertake. These exercises could be:

- News Paper Ads
- Hoarding
- Exhibitions
- Cable TV Ads
- Brochures

This section keeps track of campaign activities done by advertisement division (Digital marketing Department).

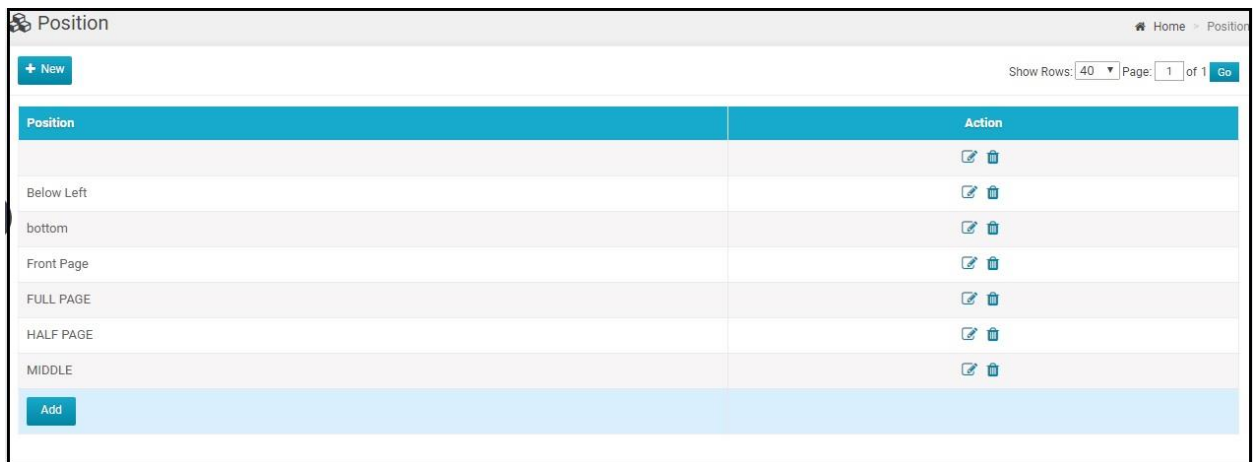
ROI (Return on Investment) report is based on this information.















## **A.Master Entries for Advertisement**

In advertisements, some masters should create before entering any details of advertisement as follows.

## A.1 Position

Position master indicates the position of the advertisement as left, right, bottom, upper left, below right etc in case of print media.



Position	Action
	 
Below Left	 
bottom	 
Front Page	 
FULL PAGE	 
HALF PAGE	 
MIDDLE	 

Path->Master->Position

**Delete** – If record is used in Position on other Program, cannot delete it.

**Modify** - If record is used in the Position, then new caption should be related to old caption, to avoid further confusion.

**New** – It will not accept duplicate name.

# CHAPTER 4: ENQUIRY

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An *enquiry* in Highrise Marketing perspective is a case of an individual or group who is/are interested in buying property and has approached us.

All the information of enquiry is recorded in the system and is used for follow-up and subsequent analysis. The entire marketing activity revolves around the enquiries. The information captured by employee gathered under four sections as Personal Information, Requirements, official information, and then follow-ups

The screenshot shows a web-based form titled "Enquiry Register". At the top right, it indicates "Handled By : vijay.kambre" and includes "Print" and "New Enquiry" buttons. The form is organized into several sections:

- Enquiry Information:** Contains fields for "Enquiry No." (with value 0), "Name" (with a "Select" dropdown), "Enquiry Date" (with value 25/02/2019 11:15 AM), and "Virtual no." (with a dropdown arrow).
- Mobile 1:** A text input field with a phone icon.
- E-mail 1:** A text input field with an email icon.
- Source of Enquiry:** A dropdown menu with "Select" as the current value.
- Enquiry Type:** A dropdown menu with "Select" as the current value.
- Project:** A dropdown menu with "Select" as the current value.
- Building:** A dropdown menu.
- Unit:** A dropdown menu.
- Temporary Booking:** A checkbox with a calendar icon.
- Remark:** A large text area for notes.
- Source Of Information:** A dropdown menu with "Select" as the current value.

At the bottom right of the form, there are two buttons: "Show More Info" and "Save".

Path->Enquniry->Enquiry Register

# A. Personal Information

Personal Information includes the Enquiry holder Email, Mobile number and Other information.

Personal Information	Other Information	Requirements	Location of Interest	Official Information	Enquiry Conclusion																																												
<table border="1"> <tr> <td>Mobile 2</td> <td>E-mail 2</td> <td>Phone No. 1</td> <td>Phone No. 2</td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>Permanent Address</td> <td>Current Address</td> <td>City</td> <td>Pin</td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td>Select</td> <td><input type="text"/></td> </tr> <tr> <td>Country/Nationality</td> <td>Resident City</td> <td>Website</td> <td>Community</td> </tr> <tr> <td>Select</td> <td>Select</td> <td><input type="text"/></td> <td>Select</td> </tr> <tr> <td>Members in Family</td> <td>Birth Date</td> <td>Age</td> <td>Anniversary Date</td> </tr> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td><input type="checkbox"/> NRI</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Staying Status</td> <td></td> <td></td> <td></td> </tr> <tr> <td><input type="text"/></td> <td></td> <td></td> <td></td> </tr> </table>						Mobile 2	E-mail 2	Phone No. 1	Phone No. 2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Permanent Address	Current Address	City	Pin	<input type="text"/>	<input type="text"/>	Select	<input type="text"/>	Country/Nationality	Resident City	Website	Community	Select	Select	<input type="text"/>	Select	Members in Family	Birth Date	Age	Anniversary Date	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> NRI				Staying Status				<input type="text"/>			
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Designation	Registered Org	Contact Person	Fax																																														
<input type="text"/>	Select	<input type="text"/>	<input type="text"/>																																														
Office Address	Phone Office 1	Phone Office 2	Spouse Working																																														
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Organization																																														
<table border="1"> <tr> <td>Unit Type Required</td> <td>Rooms</td> <td>Floor Preferred</td> <td>No. of Toilets</td> </tr> <tr> <td>Select</td> <td>Select</td> <td>Select</td> <td><input type="text"/></td> </tr> <tr> <td>Area</td> <td>Parking</td> <td></td> <td></td> </tr> <tr> <td>Select</td> <td>Select</td> <td></td> <td></td> </tr> </table>						Unit Type Required	Rooms	Floor Preferred	No. of Toilets	Select	Select	Select	<input type="text"/>	Area	Parking			Select	Select																														
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<input type="text"/>	Select	<input type="text"/>	Select																																														
Interested in Buying																																																	
<input type="checkbox"/> Ready Possession <input type="checkbox"/> Under Construction <input type="checkbox"/> Luxurious																																																	

## A. Official Information

Marketing executives can temporarily book the unit by specifying the date. If the customer will not confirm the sale within that period that flat becomes unsold.

It is very important to capture official information. At the time of actual sale, enquiries are taken from the marketing module to avoid double data entry, and enquiries are maintained as per preferred project.

There is a color convention used for units as,

1. Red: Unsold Flats
2. Yellow: Temporary Booked Flats
3. Light Blue: Booked Flats
4. Dark Blue: Confirm Flats (Agreement done)

Personal Information	Other Information	Requirements	Location of Interest	Official Information	Enquiry Conclusion
<b>Broker</b> Select	<b>Agency</b> 	<b>Broker's Mobile Number</b> 	<b>Decision Within</b> Days		
<b>First Question</b> Select	<b>Sales Point</b> Select	<b>Action Taken</b> Select	<b>Project 2</b> Select		
<b>Building 2</b> 	<b>Unit 2</b> 	<b>Customer Type</b> Select	<b>Kind of Customer</b> 		

Personal Information	Other Information	Requirements	Location of Interest	Official Information	Enquiry Conclusion
<b>Final Result</b> Select	<b>Final Remark</b> 				

## **B.Follow Up Information**

Highrise assists us in keeping track of all the enquires and reminds us about next follow-ups. Follow-up in-fact is more important than anything else in marketing if we wish to achieve sales. The entire history of follow-ups maintained for reference.

Each time a Phone Call or Visit is made against can be recorded in follow-ups along with the details and next follow-up dates. This will facilitate maintain records for subsequent reference and Highrise can remind us on the next follow-up date.

Disccues with sir for image



## B.Pending Follow Up

There is facility to remind marketing executives to view pending follow up that needs to be done in future. This is an effective tool for managing follow up work.

	<input type="checkbox"/>	Enquiry No # Name Mobile Number	Project Source Of Info	Stage Followup Mode	Next Followup Date Overdue in Days	Last Followup Date	Next Followup Emp
+	<input type="checkbox"/>	420519 #Yusuf 9858565858	!! Kanix Residency !!! BANER HORDING	N/A N/A	18 Feb 2019 7 Days	18 Feb 2019	Vaibhav K
+	<input type="checkbox"/>	420505 #Tivari 9858565226	!! Kanix Residency !!! N/A	N/A N/A	14 Feb 2019 11 Days	14 Feb 2019	Vaibhav K
+	<input type="checkbox"/>	420504 #BOshan 9858658447	N/A N/A	N/A N/A	14 Feb 2019 11 Days	14 Feb 2019	Vaibhav K

Path-> Pending Followups-> Pending Followups

Executives can check next follow up date, Last follow up, details of customer with his unique identification number. This viewing categorized in below mentioned ways,

1. Pending follow-ups that need to be done till date.
2. Follow up needs to be done from tomorrow up to a specified date.
3. Executive wise pending follow up can view.
4. It also gives facility to see pending follow up within date range.

# CHAPTER 5: ENQUIRY ANALYSIS

## A. Enquiry Analysis

Whenever any marketing aggression is launched it should be entered in the system. Subsequently, all inquiries coming to us this response can be analyzed. It is important to record responses of all the marketing exercises undertaken for future study.

The study would give indication as *to where should we pump in our marketing budget* and which Payment, Gift or other schemes to launch.

Enquiry Analysis

From Date\* 12/09/2017 To Date\* 25/02/2019 Type Enquiries

Stage Search Official Search Requirement Search Personal Information Search

Stage Nothing selected Handled By Nothing selected Grade Nothing selected Site Visit  Visit1  Visit2  Visit3

Reset Search

Search Result

Print Export (.xls) Total Records : 11 Show Rows: 160 Page: 1 of 1 Go

More	Enquiry No.	Enquiry Date	Name	Source of Enquiry	Grade	Enquiry Type
+ <input type="checkbox"/>	420520	18/02/2019 11:48 AM	Yusuf	WALK IN	A	Existing Client
+ <input type="checkbox"/>	420519	18/02/2019 11:48 AM	Yusuf	WALK IN		Existing Client

Path->Enquiry->Enquiry Analysis

This screen will help us analyze the total enquiries in various ways as

- Enquiries within date range
- Enquiries handled by a marketing executive
- Enquiries for a particular project
- Enquiries for a specific location
- Enquiries from a particular Broker
- Enquiries for a specific Budget Range

# CHAPTER 6: QUOTATION

---

During **construction**, an estimate, bid, **quote**, and proposal can take on different meanings depending on who is using the term. Some **construction** professionals use the words “estimate” and “**quote**” interchangeably, while a bid or proposal may turn into a contract if a customer signs it.

## Include in your quoting document:

- Your business details.
- Total and the breakdown of costs.
- Variations and revisions.
- Payment terms and conditions.
- Preferred payment method.
- Schedule of work with a quote expiry date.
- Customer acceptance signature.

The screenshot shows a web-based form for creating a quotation. The form is titled "Quotation" and includes a breadcrumb trail "Home > Quotation". It is divided into two main sections: "Filter Criteria" and "Quotation Details".

**Filter Criteria:**

- Project Name:** !! Kanix Residency !!!
- Building:** Building A
- Wing:** WING 1
- Unit:** wing 1 unitsP103 -Amol Rane
- Quotation Number:** 240
- A blue "+ New" button is located to the right of the Quotation Number field.

**Quotation Details:**


<b>Unit Category:</b> 1 BHK	<b>Unit Type:</b>	<b>Rooms:</b>	<b>Area 1:</b> 0.0000
<b>Area 2:</b> 0.0000	<b>Area 3:</b> 0.0000	<b>Area 4:</b> 0.0000	<b>Quotation Date:</b> 25/01/2019
<b>Prepared By:</b>	<b>Select Enquiry:</b> SHUBHAM BANKAR	<b>Enquiry No:</b> 420536	<b>Enquiry Date:</b> 25/01/2019 15:18:51

# CHAPTER 7: TARGET














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The User can assign targets to marketing executives.

## A) TARGET CODE:



The screenshot shows a web application interface for managing targets. At the top, there is a breadcrumb trail: Home > Target. Below this, there is a '+ Add' button on the left and a pagination control on the right that reads 'Show Rows: 40 Page: 1 of 1 Go'. The main content is a table with two columns: 'Description' and 'Action'. The table contains ten rows of target records, each with a description and two action icons (edit and delete).

Description	Action
2019 Targets	 
Dec-2018	 
2018-2019	 
Target For Skanda Employees 2018-2019	 
TestTarget_03012017	 
APR-2017	 
MARCH-2017	 
FEB-2017	 
Jan-2017	 
Flat target for project Abhishek.	 

Path: Pending Followups->Target code

**Delete** – If record is used in Target on other Program, cannot delete it.

**Modify** - If record is used in the Target, then new caption should be related to old caption, to avoid further confusion.

**New** – It will not accept duplicate name.

## B>TARGET ASSIGNMENT

Target Assignment Include the Employee Total Target,Target Achieved,Incentive

Target Assignment Home > Target Assignment

**Target Code** Dec-2018 **Type** Quantity **Start Date** 01/12/2017 **End Date** 31/12/2018

**Incentive** 0 **Remark**

Employee Assignment [Browse](#)

Employee	Total Target	Target Achieved	Incentive
+ support	100.00	0.00	0.00
- Saurabh837	0.00	0.00	0.00
+ snehal	2.00	0.00	0.00
- shallesh.kshirsagar	0.00	0.00	0.00
- kanix	0.00	0.00	0.00

# CHAPTER 8: USER RIGHTS

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## **A. Allocating User Rights**

In organization each user has specific roles and responsibilities. Define Role and Users accordingly. Roles can define as Administrator, Manager, Executive, data entry operator, etc. Rights of menu or process can assign to these roles. Example – sensitive data restriction to executive role.

Role can further assign to Users, Users falls in a role will have same rights.

Rights can be of Module, Menu, Company, Project, Process, etc.

Process in marketing for which rights can set are “Edit enquiry”, “Back dated enquiry”, “Approve bill”, “Open / close Enquiry”, “Export To Excel”, “Transfer Enquiry / Follow up” etc

# CHAPTER 9: REPORTS

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Reports are the reflection of data entered by the user. Reports can be intelligently designed to display the desired data generally required for documentation or reference purpose.

## **Enquiry**

Register - provided filter of date range, project, source of information, and source of enquiry.

<<<Screen print of report>>>

Label Printing - provided filter of date range, project, source of information, and source of enquiry.

To print name and address of selected enquiries

<<<Screen print of report>>>

Preference of Enquiry - provided filter of date range, project, source of information, and source of enquiry.

To get the list of units (flat / shop / plot) from selected project for which preference is given by prospects till certain date.

<<<Screen print of report>>>

## Follow-up

Register

Pending Follow-up

## Advertisement

Advertisement Expense

Source of information Register

## Project Performance

## Employee Performance

