



Case Study



Icreon

A Client Account Management System

Organizations with a large customer base often face problems in manually updating their clients' records and keeping a track of their accounts. Customers require a client account management system to organize their enormous information database - a solution to streamline and manage customer details, produce on-the-fly client information and a one stop point-of-reference for their sales and administration department. After an in dept analysis of all the requirements Icreon came up with a web enabled account management and invoicing system, scalable towards a CRM implementation. The solution was initially conceived to manage clients account information but with the passage of time and an increasing demand for plug-in functionalities, we modified the application and added new features to it.

Business Requirements

A pressing need to organize the ever increasing clients' database and to systematize the entire procedure of their account management led us to look for a comprehensive solution that would manage:

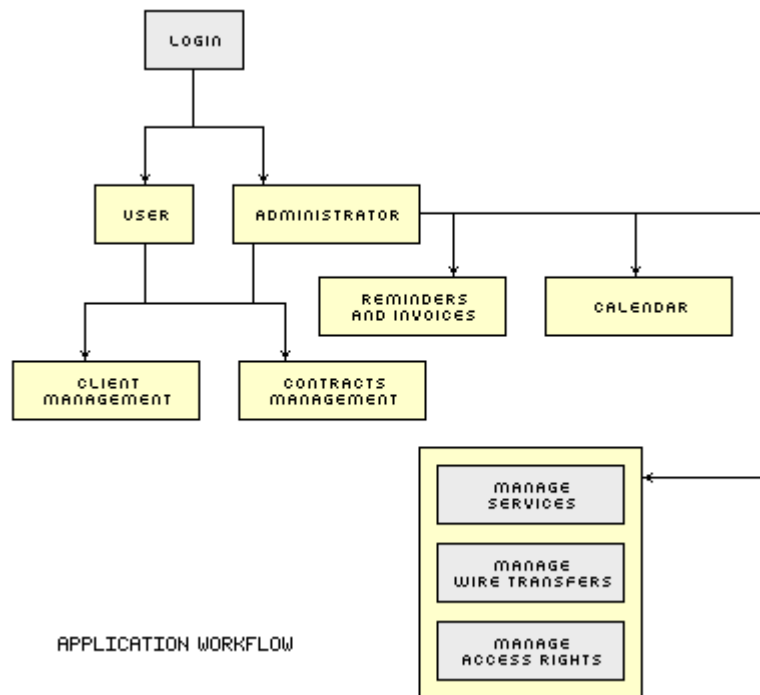
- Business leads
- Client and vendor accounts
- Invoices
- Payment processes

Icreon recognized the following potential areas of development:

- A customer's need for a solution that could offer an online solution to help sales and administration departments in organizing and keeping a check on all client-centric processes.
- A single, unified Administration console to authorize module level permissions.

Client Account Management

The solution was aimed at providing a customized client account management experience for sales and administration departments by simplifying the entire process of keeping a tab on all the processes related with client dealings. It was so desired that there should be a single administration console to authorize module level access for higher levels of security. To implement all the desired functionalities in the solution Icreon came up with a solution with the following features:



- The application is based on an n-tier architecture
- This web based application is powered by a content management system. It enables site administrators and sales managers to dynamically manage customer information.
- A multi-level administrator user management system has been integrated in this application. It empowers various sales managers with essential tools to execute their unique responsibilities and manage their respective workflows.
- The implementation of Lead Management Module enables sales personnel to keep a track of their own business leads, relating to actual or virtual inquiries and negotiations, and subsequently, associate all contract related information and documents to their own area of operations/access.
- Incorporation of Client/Vendor management system enables the super administrator to holistically manage existing client and vendor accounts.
- The Contract management module has been deployed to manage actual contract files. Sales managers are empowered to create new contracts, using this particular module. This is a password protected module and only managers with permission levels can access it. Access levels are secure. For example, sales personnel A can view contractual information and guidelines for sales personnel B, although not edit the same. This feature enables a fluid enablement of cross-functional client-account information sharing without compromising on its secure elements.
- Incorporation of Invoice module provides automatic invoice generation at the stipulated time. This module has been deployed with the facility of adding services and their related amounts so as to generate final invoices. The invoices generated through this module can be exported to PDF files with Invoice numbers (generated automatically).

- Deployment of a Payment Management module enables sales personnel to keep a track of the number and amount of payment received from clients. An automatic reminder feature has also been provided under the module which serves to provide timely reminders and updates to a super administrator (or the concerned functional head for this purpose) regarding pending payments that are to be received from a customer.
- The application generates various customizable and extensible MIS reports for statistical and financial purposes. The report generation feature is scalable, that is, further customized reports can be added at will.
- The application has a Control Panel implemented in it with the following features:
 - Service Manager: It manages a list of all the services that are being provided to clients.
 - Wire manager: It manages the payment transfers to the preset company accounts.
 - E-mail settings: It manages the valid email addresses for correspondence with our clients.
 - System Users: It is managed by the Super Administrator and through this module he can authenticate access levels to the users.

Access levels

- Super Administrator: has the complete authority to manage the application as well as authenticate access to lower level managers
- Sales Managers: they have access to their client's account only

Technologies used in developing this application are:



Summary

Within a single framework a customizable solution to manage customer centric information and details, has been conceived at Icreon. The development process of the solution was completed in many phases as new features were implemented as and when their requirements surfaced. This solution has been developed with a futuristic approach towards client database management process. The deployment of solution has provided an online platform for organizing the entire procedure of managing a client's database from the time of lead generation till the time of project completion.