

# Enter A Enquiry

Tally.ERP 9:9000

P: Print   E: Export   M: E-Mail   O: Upload   S: Shop   G: Language   K: Keyboard   K: Control Centre   H: Support Centre   H: Help

Accounting Voucher Alteration (Secondary)   Test Crm   Ctrl + M

**Enquiry** No. 1   Follow-Up Date & Time 7-Nov-2011 9.30   1-Apr-2011 Friday

Ref. :

Party's A/c Name : Ravi   Source From : New Paper  
 Address : Ravi India   Reffered By : Ravi  
 Contact Person : Mr. Ravi   Reffered To : Ravi  
 Mobile : 2343423   Office Executive : Ravi  
 Email : 423423423   Support Executive : Ravi  
 Call Status : Hot

Name of Item	Quantity	Rate	per	Disc. %	Amount
Item One	10 nos	12.00	nos		120.00
					10 nos      120.00

Call Details: Yes  
 Narration:

Q: Quit   A: Accept   D: Delete   X: Cancel

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# Enter A Enquiry Details for Follow-up

The screenshot displays the Tally ERP 9.9000 CRM module interface. The main window is titled 'Call Details' and shows a list of call records for 'Test Crm'. The records are as follows:

Enquiry No.	Date	Comment	User Id	Machine Name	Time	Next Date	Next Time
1	1-Apr-2011	Call Him on Monday	A	DHEERAJ-PC	01:56	6-Nov-2011	9.30
2	5-Nov-2011	Customer Need the Best Price	A	DHEERAJ-PC	22:22	7-Nov-2011	9.30

Additional details on the left include Party's A/c Name: Ravi, Address: Ravi Ind, Contact Person: Mr. Ravi, Mobile: 234342, and Email: 4234234. The right side shows a list of items with a table:

Name of Item	Rate	Per	Qty	Amount
Item One	12.00	nos		120.00

The bottom status bar shows the navigation path: Tally MAIN --> Gateway of Tally --> Display Menu --> Day Book --> Accounting Voucher Alteration (Secondary) --> Call Details. The footer includes copyright information for Tally Solutions Pvt. Ltd. (1988-2011) and the date/time: Tue 3 Jun 2012 22:23:45.

# Enter A Call

Tally.ERP 9:9000

P: Print   E: Export   M: E-Mail   O: Upload   S: Shop   G: Language   K: Keyboard   K: Control Centre   H: Support Centre   H: Help

Order Voucher Alteration (Secondary)   Test Crm   Ctrl + M

**Call** No. 1   Visit Date & Time 14-Apr-2011 9.30   1-Apr-2011 Friday

Party's A/c Name : Ravi   Source From : Add  
 Address : Ravi India   Referred By : Ravi  
 Contact Person : Mr. Ravi   Referred To : Ravi  
 Mobile : 2343423   Office Executive : Ravi  
 Email : 423423423   Support Executive : Ravi  
 Call Status : Pending  
 Last Executive : Ravi  
 Total Visit :

Name of Item	Quantity	Rate per	Disc. %	Amount
Item Two	1 nos	90.00 nos		90.00
				1 nos   90.00

Call Details: Yes  
 Narration:

Q: Quit   A: Accept   D: Delete   X: Cancel

Call.: 9582827928

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# Enter A Call Details for Follow-up

The screenshot displays the 'Call Details' window in Tally ERP 9.9000. The window title is 'Tally.ERP 9:9000'. The menu bar includes: P: Print, E: Export, M: E-Mail, O: Upload, S: Shop, G: Language, K: Keyboard, K: Control Centre, H: Support Centre, H: Help. The main window is titled 'Test Crm' and contains a table with the following data:

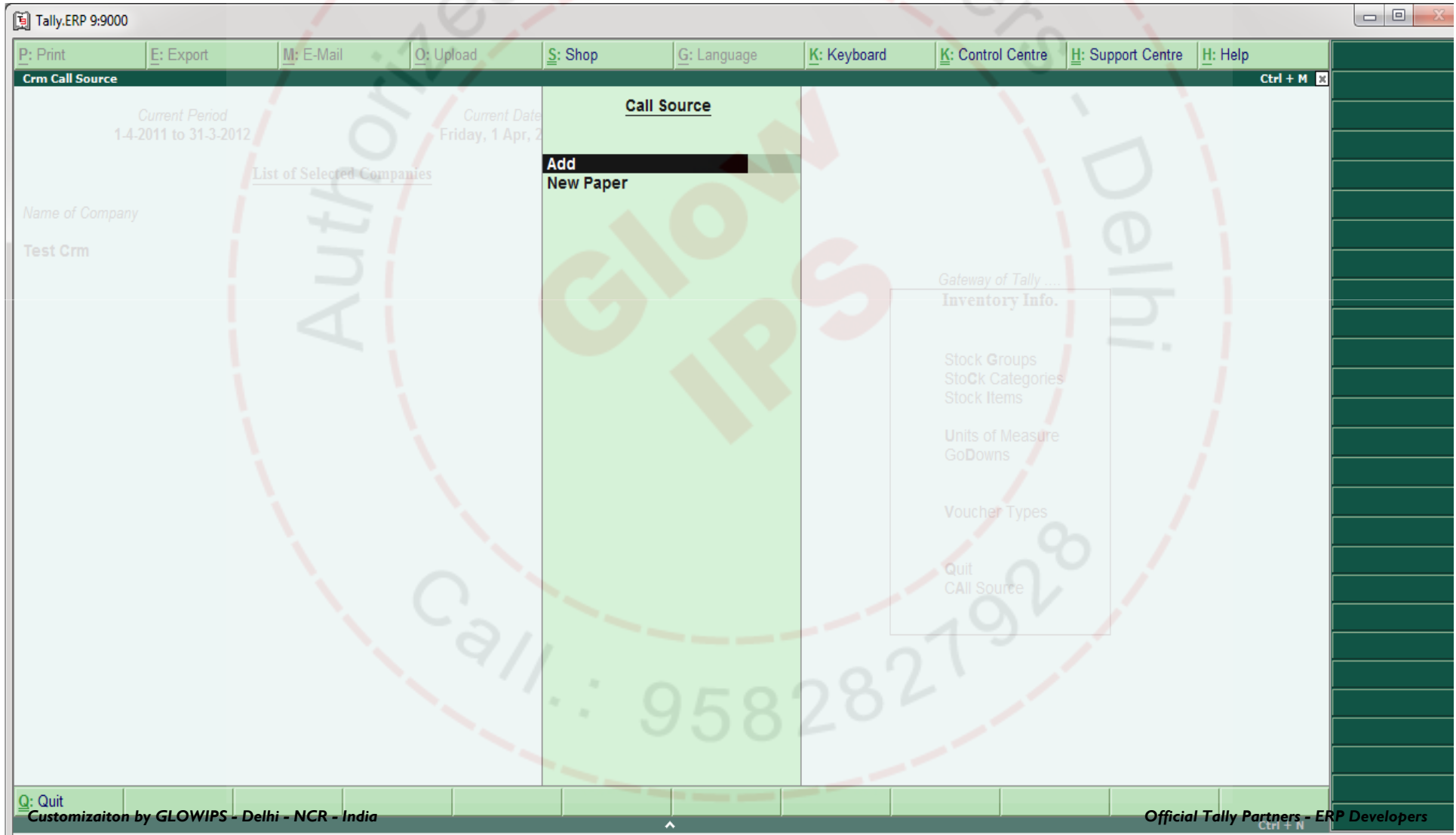
Call	No. 1	Date	Comment	User Id	Machine Name	Time	Next Date	Next Time
		1-Apr-2011	Call After 20 Days	A	DHEERAJ-PC	22:19	14-Apr-2011	9.30

Additional details on the left side of the window include:

- Party's A/c Name : Ravi
- Address : Ravi Ind
- Contact Person : Mr. Ravi
- Mobile : 2343423
- Email : 4234234

At the bottom of the window, there is a 'Call Details: Yes' checkbox and a 'Narration:' field. The status bar at the bottom shows 'Q: Quit' and 'Customizaiton by GLOWIPS - Delhi - NCR - India'.

# User Can Create Source Types





# Additional Reports for CRM

**Gateway of Tally**

Current Period: 1-4-2011 to 31-3-2012  
 Current Date: Friday, 1 Apr, 2011

**List of Selected Companies**

Name of Company	Date of Last Entry
Test Crm	1-Apr-2011

**Sp Crm Report Menu**

- Schedule Register
- Follow-Up Register
- Call Register
- Enquiry Register
- Pending Call Report
- List Of Calls
- Quit

**Product Information:**

Product	Version	License	Configuration	Calculator
Tally ERP 9	Series A Release 3.2 Latest 3.3 Available	Serial Number 733020300 Account ID dheeraj1272@yahoo.com Tally.NET subscription valid till 31-May-2012	Stat 144 1 TDL(s) loaded Proxy Client / Server with ODBC on Port 9000	160 Available 30 Failed None

Tally MAIN --> Gateway of Tally --> Sp Crm Report Menu

(c) Tally Solutions Pvt. Ltd., 1988-2011 | Tue, 3 Jan, 2012 | 22:29:50

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# Call Report Register With Filters

Tally.ERP 9:9000

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Crm Call Register   Test Crm   Ctrl + M

**Test Crm  
Schedule Register  
1-Apr-2011 to 30-Apr-2011**

Vch Date	Supp Date	Party Name	Cont Person	Particular	Office Executive	Support Executive	Status	Amount
1-Apr-2011	14-Apr-2011 9.30	Ravi	Mr. Ravi	Item Two	Ravi	Ravi	Pending	90.00

1 more ... →

Q: Quit

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Call.: 9582827928

F1: Detailed  
F2: Period  
F3: Company  
F5: Filter  
N: Auto Column  
B: Budget Variance  
F8: Other Rep  
F9: Inv Rep  
F10: Acc Rep  
F11: Features  
F12: Configure  
F12: Range

# Pending Call Reports With Filters

Tally.ERP 9:9000

P: Print   E: Export   M: E-Mail   O: Upload   S: Shop   G: Language   K: Keyboard   K: Control Centre   H: Support Centre   H: Help

Pending Call Registrar   Test Crm   Ctrl + M

Pending Call :1-Apr-2011 to 1-Apr-2011

Date Of Call	Party Name	City	Time	Person Contacted	Next Call Assigned To	Remarks
1-Apr-2011	Ravi	Delhi	14-Apr-2011 at 9.30	Mr. Ravi	Ravi	Call After 20 Days

Q: Quit

Customization by GLOWIPS - Delhi - NCR - India

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F1: Detailed  
F2: Period  
F3: Company  
N: Auto Column  
B: Budget Variance  
F8: Other Rep  
F9: Inv Rep  
F10: Acc Rep  
F11: Features  
F12: Configure  
F12: Range

Call.: 9582827928



# Call History And Follow-UP With Filters

Tally.ERP 9:9000									
P: Print		E: Export		M: E-Mail		O: Upload		S: Shop	
G: Language		K: Keyboard		K: Control Centre		H: Support Centre		H: Help	
Crm FollowUp Register			Test Crm			Ctrl + M			
<b>Test Crm</b> <b>Follow-Up Register</b> <b>1-Apr-2011 to 14-Nov-2011</b>									
Vch Date	Supp Date	Party Name	Cont Person	Particular	Office Executive	Support Executive	Status	Amount	
						1 more ... →			
1-Apr-2011	7-Nov-2011 9.30	Ravi	Mr. Ravi	Item One	Ravi		Hot	120.00	
1-Apr-2011	Call Him on Monday	A	DHEERAJ-PC	01:56	6-Nov-2011	9.30			
5-Nov-2011	Customer Need the Best Price	A	DHEERAJ-PC	22:22	7-Nov-2011	9.30			