

Interface Design and Development in CRM tool Using PHP and Angular-JS for Consultants

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Abstract— Customer Relationship Management (CRM) is a business approach that targets to realize, anticipate and achieve the needs of an organization. My Plug-in (WP-CRM Plug-in for Consultants) is an improved version of WP-CRM which will satisfy customer's needs and it will reach the Ideal expectations of interactive users.

We create a WP-CRM plug-in using PHP language for consultants we have two more features of CRM structure one important feature is leads and another one is deals. We provide a chat option in CRM plug-in to easily chat with customers and contact. It helps to customer either customer have question about any query. Customer can easily ask on chat option.

Chat feature is respond rapidly, accurately, and securely. Collect pre-chat questionnaire data in conversational style. Many other chat software is available to integrate plug-ins but this chat option is included a CRM plug-in. The plug-in is developing a PHP language to helps a server site the main two feature of this plug-in is leads and deals.

Index Terms— CRM, Plug-ins, Word Press, PHP.

1 INTRODUCTION

CRM programming is normally used to deal with a business-client relationship, however CRM programming frameworks are likewise utilized as a part of the same approach to oversee business contacts, customers, contract wins and deals leads.

CRM software's is one of the latest and fastest technologies that helps for customers. The paper demonstrates the analysis of CRM structure using word press plug-in. It also highlights the main issues and technical aspects of using Wp-CRM plug-in which is help of consultants.

Client Relationship Management (CRM) is a system for dealing with all your organization's connections and co operations with your clients and potential clients. It offers you some assistance with improving your gainfulness.

CRM empowers you to concentrate on your association's associations with distinctive individuals – whether those are customers, service clients, partners or suppliers. A portion of the greatest additions in efficiency can originate from moving past CRM as a business and showcasing apparatus and inserting it in your business – from HR to client administrations and supply chain administrator.

A CRM structure offers your business some help with developing in light of the fact that it tracks the recorded scenery of customer associations. Why is this fundamental? Since following is everything. From calls made and messages sent, to social events held, introductions passed on, and even the accompanying advances anticipated that would make a living or build up that customer account.

To run effectively, your business needs customer relationship data that is normally updated, with minute access for laborers, and gives a full history of all correspondences, social affairs, and reports shared. With a CRM structure, your business has one spot to store every customer, each lead, every organization request, the greater part of their contact information, inclinations, and history so your exchanges are always individual, material, and front line. All open on adaptable, work area and through viable reports and dashboards. Sponsors can in like manner use CRM to better fathom the pipeline of approaching arrangements making foreseeing not so much troublesome but rather more exact. You'll have clear see capacity of the route from enquiry to bargain, open wherever and at whatever point you require it.

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A. Why CRM Matters:

A CRM framework offers your business some assistance with growing on the grounds that it tracks the historical backdrop of client connections. Why is this essential? Since following is everything. From calls made and messages sent, to gatherings held, presentations conveyed, and even the following steps expected to bring home the bacon or develop that client account.

To run easily, your business needs client relationship information that is naturally upgraded, with moment access for workers, and gives a full history of all correspondences, gatherings, and reports shared.

With a CRM framework, your business has one spot to store each client, each lead, each administration ask for, the majority of their contact data, preferences, and history so your discussions are constantly individual, applicable, and cutting-edge. All accessible on versatile, desktop and through effective reports and dashboards.

Advertisers can likewise utilize CRM to better comprehend the pipeline of imminent deals making anticipating less difficult and more precise. You'll have clear perceive ability of the way from enquiry to deal, accessible wherever and at whatever point you require it.

B. LEAD:

A lead is a contact or an account with very little information. It could be just a person who you might have met at a conference. You will need to retrieve more information regarding this lead in order to create (qualify) an opportunity in your sales pipeline. An old sales rule says: if you have never contacted your contact, it's a lead.

Leads are the details gathered about an individual or representatives of an

organization. They play a very important role in an organization's Sales & Marketing department and are useful in identifying potential customers. Collecting leads and managing them are the initial stages in the sales process. Leads can be obtained through trade shows, seminars, advertisements, marketing campaigns etc. Once the leads are collected, it is essential to manage them and follow them up until the leads qualify to prospective customers. The sales department's approach in managing leads can significantly impact the success of an organization.

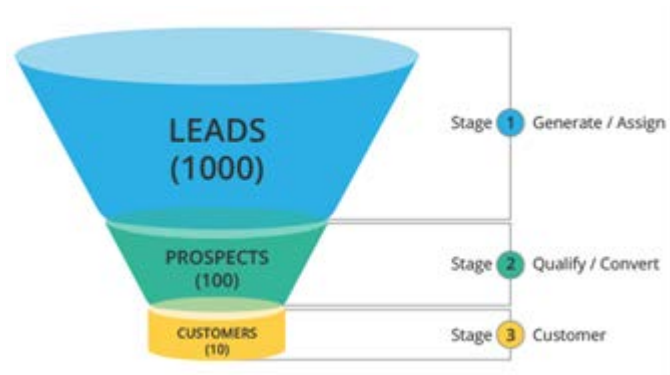


Figure 1: Leads

C. What are deals?

Think of deals as a way of identifying qualified leads as sales opportunities. Deals are contacts that no longer sit dormant in your database; they're actually in your pipeline and are on track to become customers. Being clear on what criteria makes a lead qualified is important. Lead scoring is one of the most effective ways to qualify prospects. Assigning points to contacts based on their actions is commonly done to sort out qualified leads from the bunch. However, lead scoring is far from the only method for qualifying prospects. You can use the [segment builder](#) in Active Campaign to qualify your leads in a variety of ways. When a deal is created it is assigned to an internal team member who monitors and manages the movement of deals from stage to stage in your pipelines.

D. Word press:

All that you see here, from the documentation to the code itself, was made by and for the group. Word Press is an Open Source venture, which implies there are many individuals everywhere throughout the world taking a shot at it. (More than most business stages) It additionally implies you are allowed to utilize it for anything from your formula website to a Fortune 500 site without paying anybody a permit expense and various other critical flexibilities.

E. Wordpress CRM plug-in:

This plug-in stores contacts in your Word Press user database. You have the ability to add contacts manually or capture them automatically through

a lead generation form on your website. If you're uncomfortable with the idea of your prospects and customers being designated as users, you may rest a little easier knowing you can specify the default role that's assigned to them. The lead forms are easily customizable, so you can collect whatever data you'd like. Advanced options also let you designate which fields are required. With WP-CRM, you can conveniently edit forms and manage contacts from within your Word Press admin. Each contact record can be categorized by contact type and has a correspondence thread, so you can keep track of every interaction. Once you start building a customer base with your Word Press site, it's critical to have a CRM solution in place that can help you build future business. The more you know about your customers, the better positioned you are to provide the products, service and support they need. CRM solutions can also be invaluable for highlighting underperforming customer segments and growth opportunities.

The problem discussed above leads us to some questions that would be addressed in this research thesis.

- *How to manage leads in WP-CRM plug-in?*
- *Ability to manage all forms.*
- *How to convert leads in deals?*
- *Ability to show deal graphs?*
- *When leads convert to deals?*
- *Where should be DB stored in WP-CRM plug-in?*
- *Addition of chat feature in Word press CRM plug-in.*

We have to facilitate the users to provide good solution of CRM through the word press plug-in. Word press plug-in of CRM is to help the organization who use word press websites. Easily use to CRM plug-in this plug-in helps to the customers who use the CRM system. In this paper we will profoundly examine WP-CRM plug-in some of its real issues and giving conceivable answer for those issues. Alongside that we will be talking about Advantages and advantages of utilizing Wp-CRM plug-in. We will likewise talk about the expansion of WP_CRM plug-in highlights. This correlation is finished by utilizing php dialect to make a WP-CRM plug-in to upgraded highlights.

II. RELATED WORK

Client relationship administration (CRM) is a term that alludes to practices, systems and advances that organizations use to oversee and break down client communications and information all through the client lifecycle, with the objective of enhancing business associations with clients, aiding client maintenance and driving deals development. CRM frameworks are intended to assemble data on clients crosswise over various stations - or purposes of contact between the client and the organization - which could incorporate the organization's site, phone, live talk, regular postal mail, showcasing materials and online networking. CRM frameworks can likewise give client confronting staff definite data on clients' close to home data, buy history, purchasing inclinations and concerns. The new type of clients is more mindful and educated hoping to be served whenever, anyplace in the midst of an unending assortment of items and administration channel alternatives. They request reliable experience over all channels, alongside more control over the purchasing procedure, with a call for more customized benefit, pertinent informing and offerings, and more noteworthy assortment and incentive for cash. The term CRM has a wide range of understandings. It is essential to perceive that CRM isn't only an innovation however an arrangement of capacities, procedures, techniques and advancements

to oversee end-to-end client relationship – CRM.[1].

This examination investigates how client relationship administration (CRM) frameworks bolster client information creation forms [48], including socialization, externalization, mix and disguise. CRM frameworks are classified as community oriented, operational and expository. An examination of CRM applications in three associations uncovers that logical frameworks firmly bolster the blend procedure. Community frameworks give the best help to externalization. Operational frameworks encourage socialization with clients, while community frameworks are utilized for socialization inside an association. Collective and systematic frameworks both help the disguise procedure by giving learning openings. Three-route associations among CRM frameworks, sorts of client information, and learning creation forms are investigated.[2]

III. OUR WORK:

In this paper we will deeply discuss WP-CRM plug-in some of its major issues and providing possible solution for those issues. Along with that we will be discussing Advantages and benefits of using WP-CRM plug-in. We will also discuss the addition of WP_CRM plug-in features. This comparison is done by using PHP language to create a WP-CRM plug-in to enhanced features. CRM chat is added in this plug-in to communicate the customers rapidly.

Our research is preliminary and qualitative in nature. The most important thing while considering the use of any CRM plug-in is how well we can use this plug-in. The basic question is not that this WP-CRM plug-in can provide better solution for customers but rather it is the question of the consultants is true ability and creativity features is not available in this WP-CRM plug-in. Sometimes ideal Plug-in can't provide better solution for customers because there were not handled creatively. It is all about the quality of work and the code that can truly enhance the features and performance and quality of the project. Apart from the debate there are some other aspects as well that can boost up an Plug-in performance.

We provide a CRM solution for consultants and we create a plug-in through using a PHP language and angular js. PHP language is server based and angular js is client site that's why we using both for plug-in. We also provide a Chat option in this CRM plug-in. Development of plug-in is using both languages to help the development phase.

Addition of chat feature is basically need to improve our clients communication. It is very helpful for clients and organization customers. CRM provides best solution for clients that's why we introduce a chat feature . Chat feature develops a angular JS language it's a client solution for others.

There are certain other huge platform provides CRM helps in customer needs. Our research in this paper is that adding features in WP-CRM plug-in just like leads and deals. Leads and deals is the main feature of any CRM. But unfortunately the plug-in of WP-CRM is not provide a ideal

solution for customers that's why I will try to provide a ideal solution for consultants through this changes of WP-CRM plug-in.

To construct a CRM framework that works on various levels for your image, you as the engineer should be vigorously included in the framework get together process. That implies understanding your different choices and the stages included in assembling a workable, advanced CRM framework that can incorporate with other developing innovations. Building a CRM framework that will make your Sales group more viable and your business more focused is not simply an issue of picking the right innovation; it likewise requires a dream of what you need to accomplish, and the capacity to get your association to say something behind you on it.

Steps of building a CRM:

1. Define your vision
2. Define your strategy
3. Define your business objectives
4. Identify the metrics
5. Prioritize your initiatives
6. Build your roadmap

IV. COMPARISON

The comparison shows that we added new features in WP-CRM plug-in just like leads and deals. Leads and deals is the main feature of any CRM. But unfortunately the plug-in of WP-CRM is not provide a ideal solution for customers that's why I will try to provide a ideal solution for consultants through this changes of WP-CRM plug-in.

We provide the CRM solution for Wordpress users to add a CRM plugin. We also provide a chat option in this plug in for user support service. Main feature is leads and deals to facilitate a customers profile.

| Features | WP-CRM Plug-in | New WP-CRM Plug-in |
|---|----------------|--------------------|
| Excellent user organization, filtering and editing. | ✓ | ✓ |
| Ability to easily add new user data attributes (i.e. Company Name). | ✓ | ✓ |
| Dynamic charts representing attributes with quantifiable data. | ✓ | ✓ |
| Excellent user organization providing a solution. | ✓ | ✓ |
| Ability to show deal graphs. | ✗ | ✓ |
| Contact Forms for front-end | ✓ | ✓ |
| Convert leads into deals. | ✗ | ✓ |
| CRM chat with customers | ✗ | ✓ |
| Will the convert leads into deals | ✗ | ✓ |

Figure 2: Comparison

V. CONCLUSION

The main objective of this thesis was to find an answer to the how to work CRM in word press plugging and what is the problems in this word press CRM plug-in. For this purpose, we investigate approach that can be followed to define a CRM model. The identified approach was used to define a model of CRM in word press Plug-in. Furthermore, we applied the CRM model in the plug-in using PHP language to evaluate the usefulness of the model. In this chapter, we summarize the findings of this study, and we indicate possible areas for future research.

The first goal was to identify a structured approach which can be used to establish the leads. What is Leads basically Information of one user and complete all stages of user conversation put in Leads detail when user is satisfy from organization that time all conversation put in Leads detail.

Leads manage all data of user in word press Plug-in through database.

We solved this problem in this paper Word press plug-in is ability to manage all forms information. Filter forms ,addition information like edit a form.

The main purpose of this paper is that convert leads into deals. Its not automatically it is based on leads status when leads status is 100% then leads convert to deals.

This paper we discussed and addition of deal graph feature.

When leads status is 100% then leads convert to deals.

DB stored in word press database.

Addition of chat feature is helps to clients and customers this feature is developed using Angularjs language its different for others. Word press CRM plug-in is dealing to customers and different clients chat feature is to communicate with directly clients and organization.

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