



# Customer Relationship Management

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By : Blue Stone Solution

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# Solutions & Services Customer Relationship Management

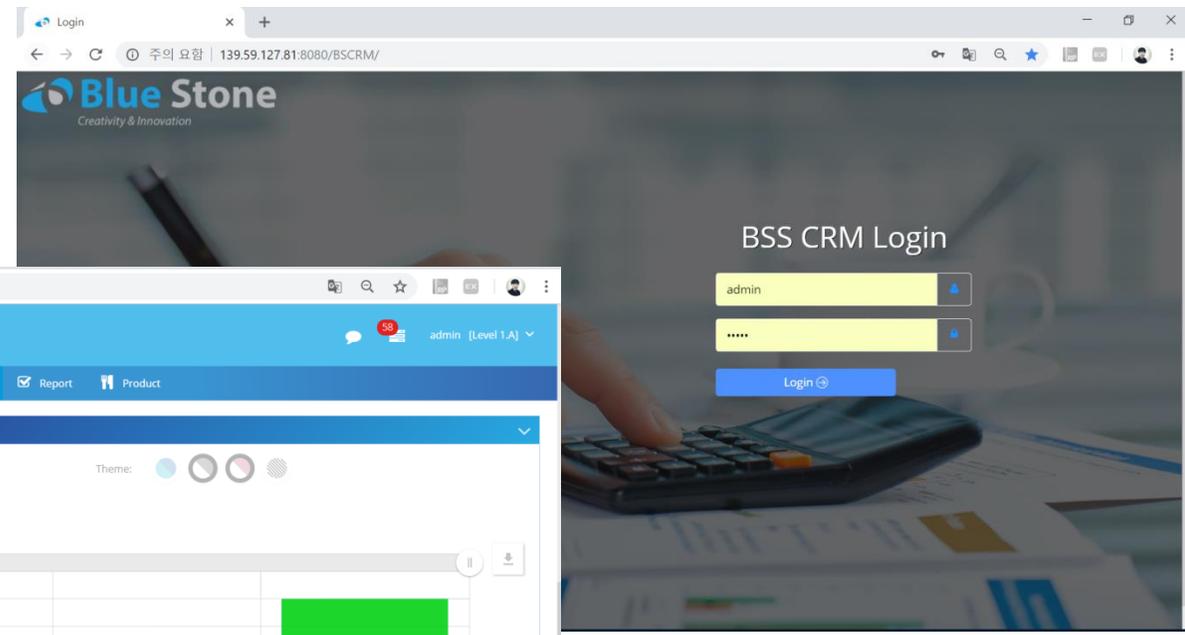
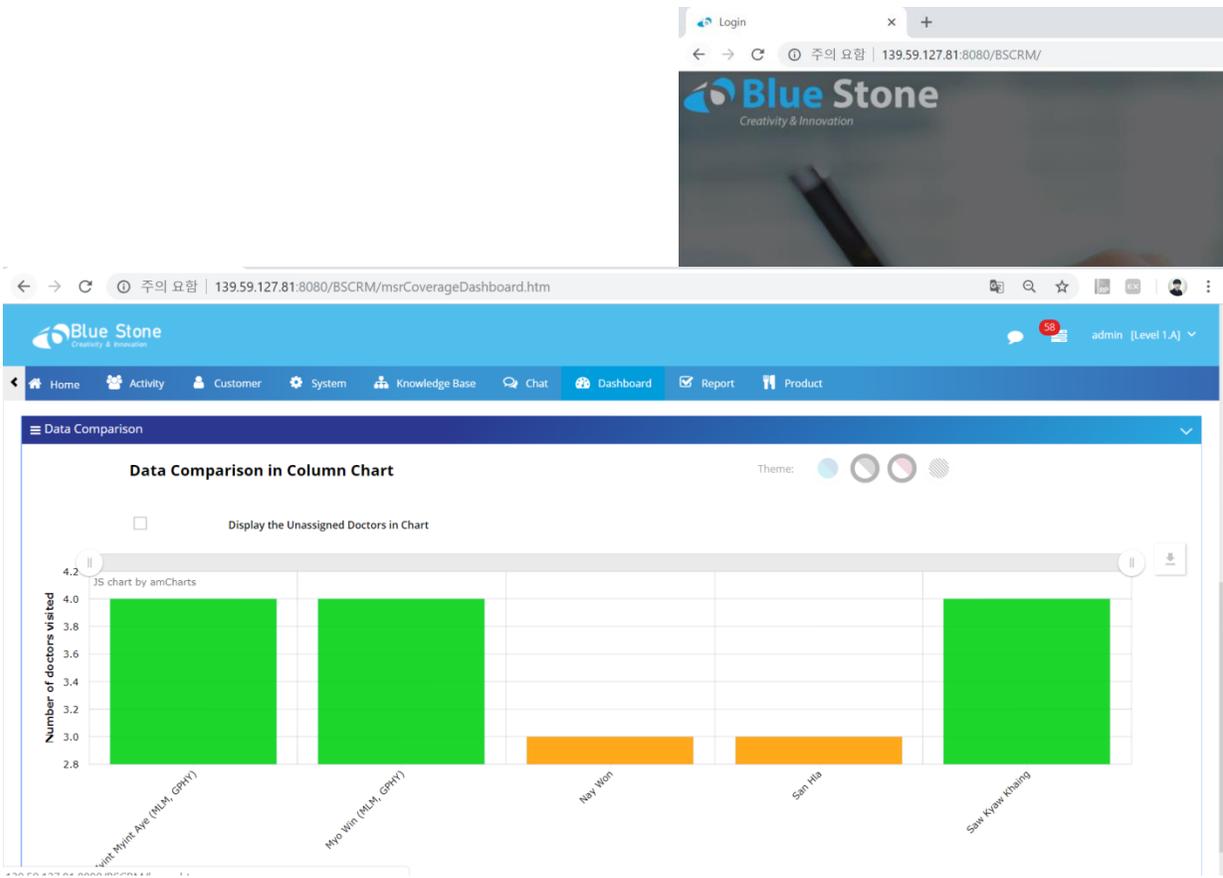


## BLUE STONE CRM

### Cloud or On-Premises

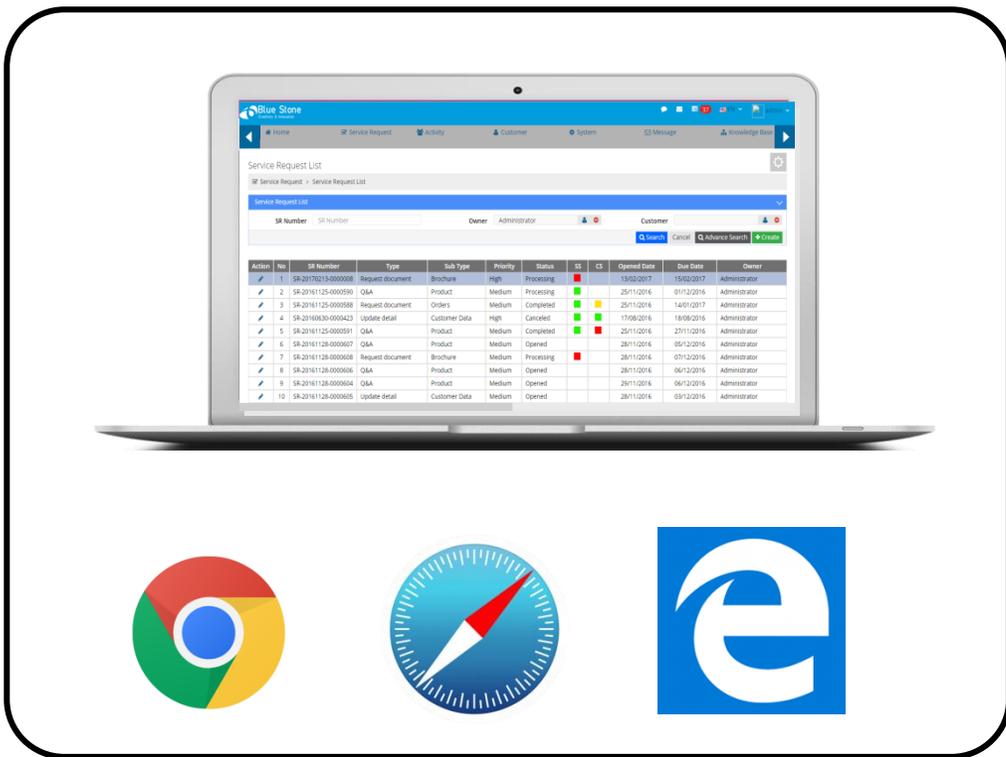
Progressive organizations demand solutions that are flexible enough to accommodate dynamically changing business needs. BlueStone CRM helps organizations to enhance their Customer Relationship Management capabilities by comprehensively managing relevant sales, service, marketing processes.

BlueStone CRM is a comprehensive, easy-to-use, enterprise class customer relationship management (CRM) solution. It is rich in features and functionality and fast to implement. It enables companies to manage and seamlessly share information across departments by centralizing all customer data. BlueStone CRM is powerful, yet simple-to-use. BlueStone CRM unique architecture ensures that companies experience the benefits of a CRM solution without associated operational issues.

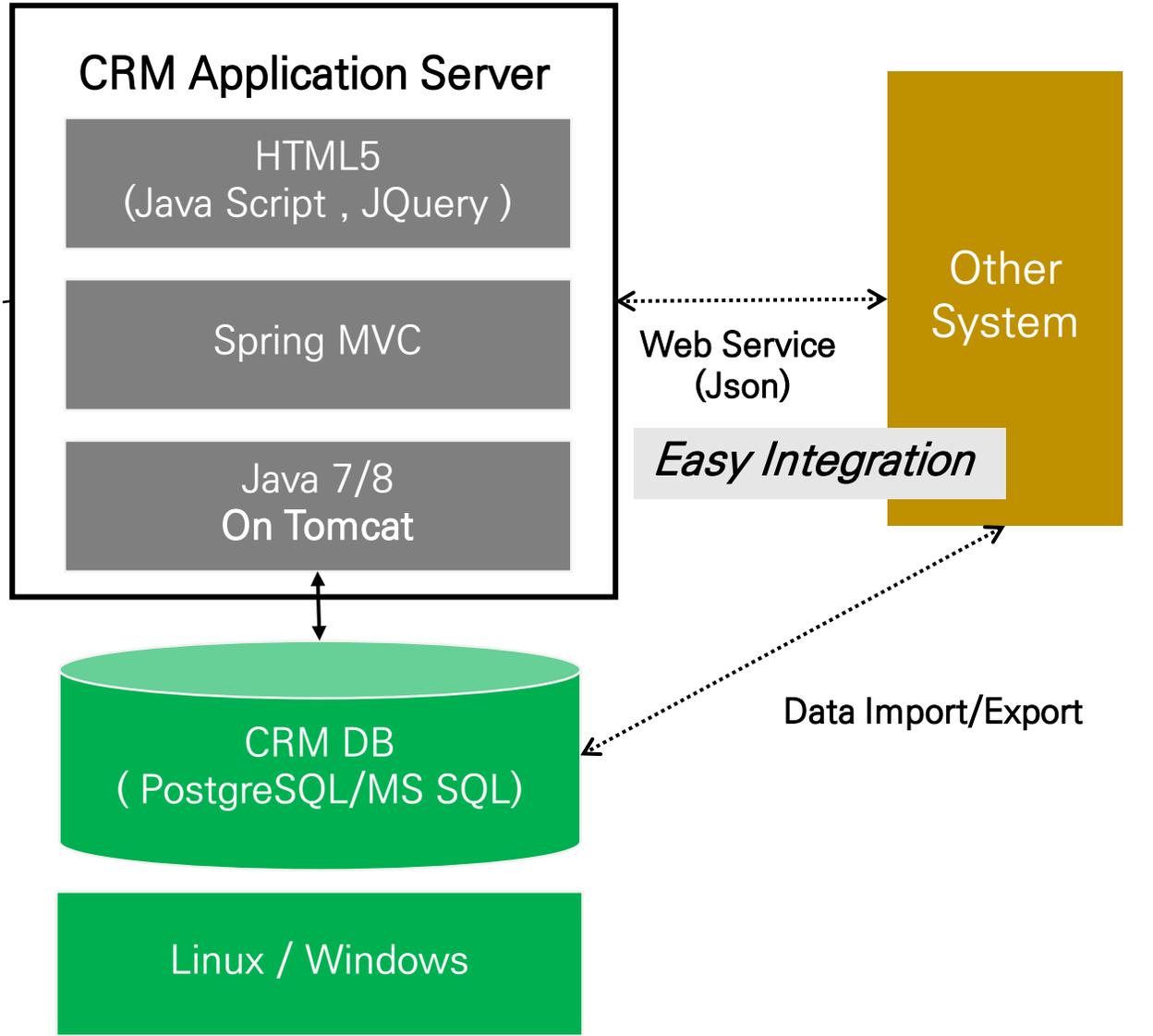


# Solutions & Services

## Customer Relationship Management : Architecture



Chrome, Firefox , Safari, Internet Explorer



## BLUE STONE CRM

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### 1. Customer Profile Management

- Corporate Customer, Individual Customers
- Additional Demographic Information
- Asset Management (Agreement and Purchased Products)
- Manage multi addresses and locations linked to Map( Google Map)
- Customer Single View ( 360 Degree )

### 2. Service Request

- Capturing Service Request, Complaint , Inquiry and Other Customer Request Information
- Automatic Assignment According to SR Type and Customer
- Automatic Time Due by SR Type, Sub Type and Customer Type
- Multiple Activities Relationship and Assignment
- Status Tracking and Dashboard To Monitor
- Service Escalation and Assignment

# Solutions & Services

## Customer Relationship Management : Features



### 1 Customer Management

The screenshot shows the 'Customer' management interface. The breadcrumb trail is 'Customer > Doctor'. The 'Doctor Profile' section includes the following fields:

- Category: Doctor
- Unique ID: D-04715
- Name: Aik San
- Title: General practioner
- Specialty: Physician
- Sub Specialty: General Practioner

Other visible fields include Mobile, Remark (Naing Oo Thu clinic), Email, City Target, and Status.

### 2 Service Request Management

The screenshot shows the 'Service Request List' interface. The breadcrumb trail is 'Service Request > Service Request List'. The table below lists the service requests:

Action	No	SR Number	Type	Sub Type	Priority	Status	SS	CS	Opened Date	Due Date	Owner
	1	SR-20170213-0000008	Request document	Brochure	High	Processing	■		13/02/2017	15/02/2017	Administrator
	2	SR-20161125-0000590	Q&A	Product	Medium	Processing	■		25/11/2016	01/12/2016	Administrator
	3	SR-20161125-0000588	Request document	Orders	Medium	Completed	■	■	25/11/2016	14/01/2017	Administrator
	4	SR-20160630-0000423	Update detail	Customer Data	High	Canceled	■	■	17/08/2016	18/08/2016	Administrator
	5	SR-20161125-0000591	Q&A	Product	Medium	Completed	■	■	25/11/2016	27/11/2016	Administrator
	6	SR-20161128-0000607	Q&A	Product	Medium	Opened			28/11/2016	05/12/2016	Administrator
	7	SR-20161128-0000608	Request document	Brochure	Medium	Processing	■		28/11/2016	07/12/2016	Administrator
	8	SR-20161128-0000606	Q&A	Product	Medium	Opened			28/11/2016	06/12/2016	Administrator
	9	SR-20161128-0000604	Q&A	Product	Medium	Opened			29/11/2016	06/12/2016	Administrator
	10	SR-20161128-0000605	Update detail	Customer Data	Medium	Opened			28/11/2016	03/12/2016	Administrator

## BLUE STONE CRM

### Cloud or On-Premises

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### 3. Activity Management

- Scheduling Task for Future Plan and History
- Due Date For Task Completion
- Attachment and Detail information of Activity
- Seamless integration to Mobile Platform
- Status Tracking and Dashboard to Monitor
- Link To Service Request

### 4. Agent Tracking

- Tracking and Monitoring current agent's/employee's Location
- Get current location from Mobile App in real time
- View of History of agent's/employee's location
- Monitor via Map , and Assign closest agent to handle the case/service request.

# Solutions & Services

## Customer Relationship Management : Features

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Activity Detail

Act Number	ACT-SR-20170221-0000006	Phone No.	034-567-8987	Status *	Open
Attend To *	aaa	SMS No.	098-777-7777	Assign To	Administrator
Title *	a	Fax No	009-843-2345	Department	Maintenance
Type *	Call back appointment	Email		Due Date	
Address	6, Hlaing, Yangon	Customer		Operation Date	
	<input type="button" value="Select"/>			Closed Date	

Detail \*

Call Report  
text for report

Document List

Attachment	No	Document Name
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3 Activity Management

**Blue Stone** Creativity & Innovation

Home Service Request Activity Customer System Message Knowledge Base

### Agent Location Tracking

Agent Location > Agent Tracking Location

Search By

Team	Team	Name	Administrator a
Start Time	11/07/2016 14:00	End Time	11/07/2016 15:30

Map Tracking List

4 Agent Tracking

## BLUE STONE CRM

### Cloud or On-Premises

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### 5. Campaign Management

- Campaign Planning, Budget and Cost
- Campaign Execution Options (Manual, Auto)
- Multi Prospect/Customer List Management
- Multi Attachments for Campaign
- Multiple Treatments (SMS, Email, Call, Face-to – face)
- Campaign Execution Results
- Easy agent/employee View for Assigned Campaign

### 6. Offer/Prospect / Script Management

- Offer to Customer with Products
- Scripts for Employees to Communicate with Customers/Prospects
- Import Prospect List (using CSV Excel Format)
- Extract Customer List from Database with Various Conditions (using Demographic Info)
- Reusable Prospect/Customer List

# Solutions & Services

## Customer Relationship Management : Features

5 Campaign Management

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Home | Service Request | Activity | Customer | System | Message | Knowledge Base

### Campaign Management

Home > Campaign > Campaign Details

**Campaign Main**

Campaign Name: Save Money  
 ID: CPF-20161122-000349  
 Owner: Administrator a  
 Planned Budget: 10000000  
 Option: Auto Start  
 Plan To Start: 02/01/2017 00:00  
 Planned Cost: 1966222  
 Type: C  
 Actual Cost: 1900222  
 Status: E  
 Objective: To inform prospective clients.  
 Description:

Created By: Administrator a  
 Created Date:  
 Updated By: Administrator a  
 Updated Date:

6 Offer Management

**Blue Stone** Creativity & Innovation

Home | Service Request | Activity | Customer | System | Message | Knowledge Base

### Offer

Home > Offer > Offer Detail

**Offer Detail**

Offer Id: OFF-20161117-0000288  
 Offer Name: New Drug Promotion  
 Owner: Administrator a  
 Type: Normal  
 Status: Active  
 Approved By: Emily Edwards  
 Reference: from SANOFI  
 Description:  
 Start Date: 17/11/2016 00:00  
 End Date: 09/12/2016

Created By: Administrator a  
 Created Date: 17/11/2016 17:29:34  
 Updated By: Administrator a  
 Updated Date: 23/11/2016 15:14:24

Save | Cancel | Back

**Offering Product List**

No	Product Id	Product Name	Type	Calc Type	Status	Action
1	1	Selsun Blue	Consumer Healthcare	Type 1	Using	

## BLUE STONE CRM

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### 7. Knowledge Management

- Basic Solution Data/Information
- Tag Base Search
- Tree/Hierarchy Structure for Easy Search and Access
- Document Attachment
- Attachment Preview
- Branch/Site Search

### 8. Survey Management

- Multi Questions and Answers
- Based on Answer, Next Question is determined
- Hierarchy/Tree Structure of Questions
- Standard Survey Report
- Support Mobile Survey

# Solutions & Services

## Customer Relationship Management : Features

### 7 Knowledge Management

**Questionnaire Structure**

- Drug Knowledge
  - Antibiotics
    - Why do I have to take all of my antibiotics if I feel...
    - Why don't I need antibiotics when I have a cold?
  - Group Health's Drug Formulary
  - Generic Drugs

**Script Info**

ID: 2301    Seq:    Category: Questionnaire

Parent Folder: Pharmacy campaign

Question Text: 1. What's the share (%) of your patient source for the below channel (public hospital, private hospital, clinic, GP, direct patient, ...)

Created By: Thomas Gruffat    Created Date: 24/09/2018 11:19:34

Updated By:    Updated Date:

[+ Create Folder](#)   [Edit](#)   [Delete](#)   [+ Create Answer](#)

No	Answer	Next Question	Action
1	10% 25% 25% 20% 20%		<a href="#">Delete</a>
2	20% 20% 10% 30%		<a href="#">Delete</a>
3	20% 20% 30% 40% 50%		<a href="#">Delete</a>
4	20% Direct patient		<a href="#">Delete</a>
5	20% Direct Patient		<a href="#">Delete</a>

### 8 Survey Management

## BLUE STONE CRM

### Cloud or On-Premises

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### 9. Other

- Chat To Agent / Supervisor
- Notification / Message Broad Casting
- CTI/Call Integration
- Dashboard and Excel Standard Report
- User Management
- Menu and Access Control
- Code Management

# Solutions & Services

## Customer Relationship Management : Features



9 Chat Integration

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Home Service Request Activity Customer System Message Knowledge Base

Chat Box

Home > Chat > Chat Box

Zaw Peter

Employee List

Corporate Giving & Support

08/01/2017 09:32:39  
hi  
received

10/02/2017 11:17:45  
hello  
received

10/02/2017 13:58:36  
hi  
received

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Home Activity Customer System Knowledge Base Chat Dashboard Report Product

Coverage Dashboard

Export to:

No	MSR Name	Territory Name	Visited Percentage (%)	Class	To Visit	Assigned	Unassigned
1	Aung Ko Ko Oo	MLW_CV	100 %	A	7	7	0
2	Aung Ko Ko Oo	MLW_CV	100 %	B	10	10	0
3	Aung Ko Ko Oo	MLW_CV	100 %	C	14	14	0
4	Aung Ko Ko Oo	MLW_CV	48 %	D	40	19	0
5	Aung Ko Ko Oo	MLW_CV	0 %	Null	0	0	0
6	Aung Ko Phyo	YGN_VAC_4	100 %	A	9	9	0
7	Aung Ko Phyo	YGN_VAC_4	89 %	B	18	16	0
8	Aung Ko Phyo	YGN_VAC_4	53 %	C	32	17	0
9	Aung Ko Phyo	YGN_VAC_4	0 %	D	5	0	0
10	Aung Ko Phyo	YGN_VAC_4	0 %	Null	0	0	7

Showing 1 to 10 of 275 entries

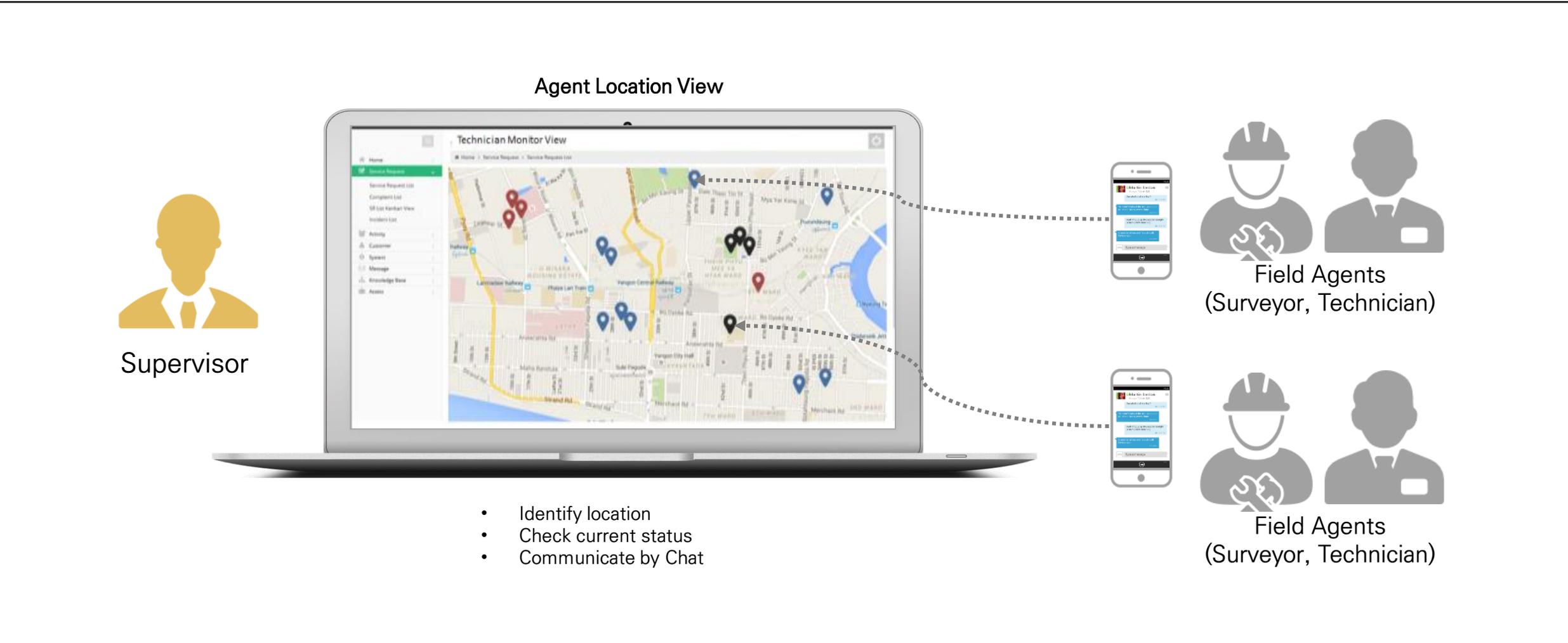
< 1 2 3 4 5 >

9 Dashboard

# Solutions & Services

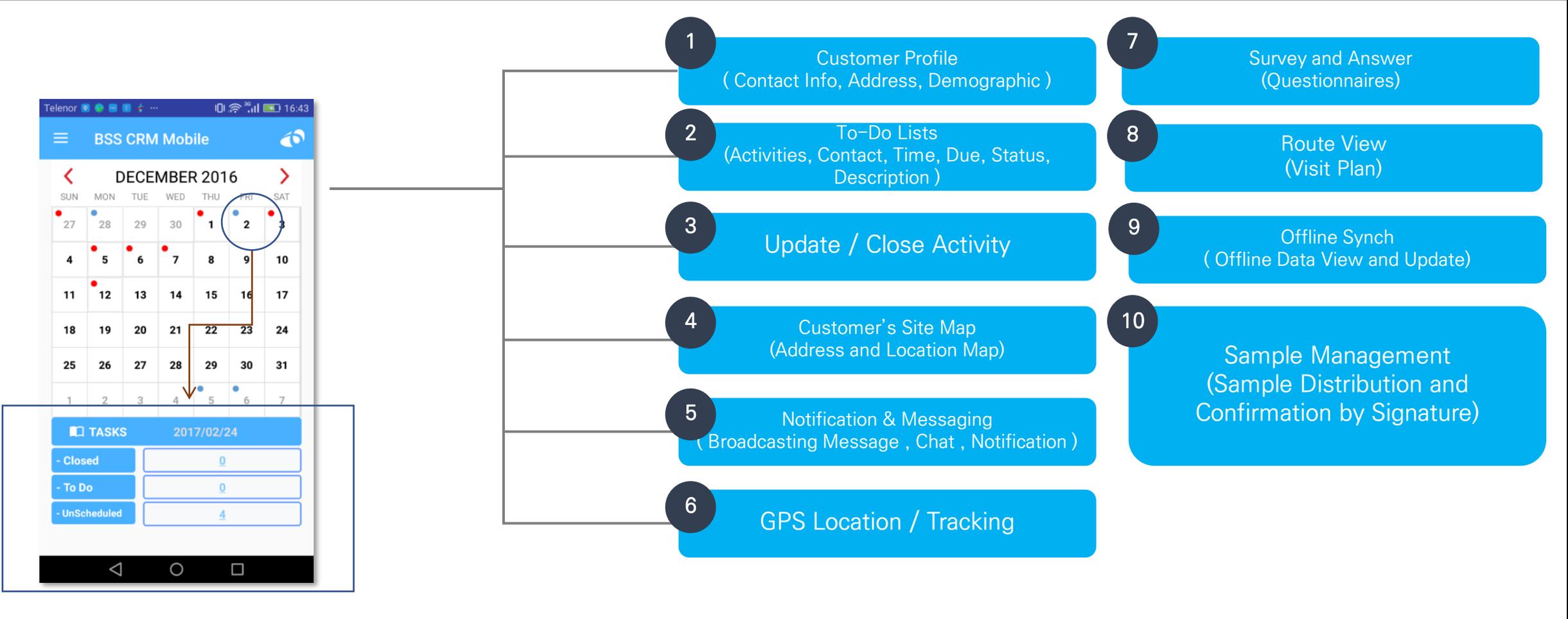
## Customer Relationship Management : Features

Agent / Technician's Location View provides real-time, current location, including its status; allowing supervisors to know all resource status at a glance.



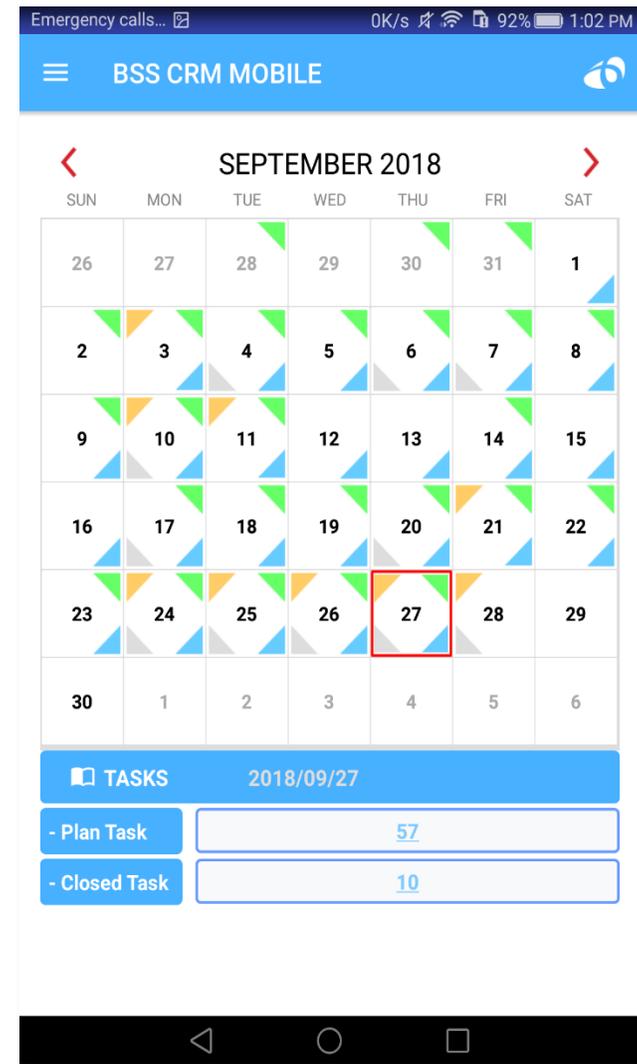
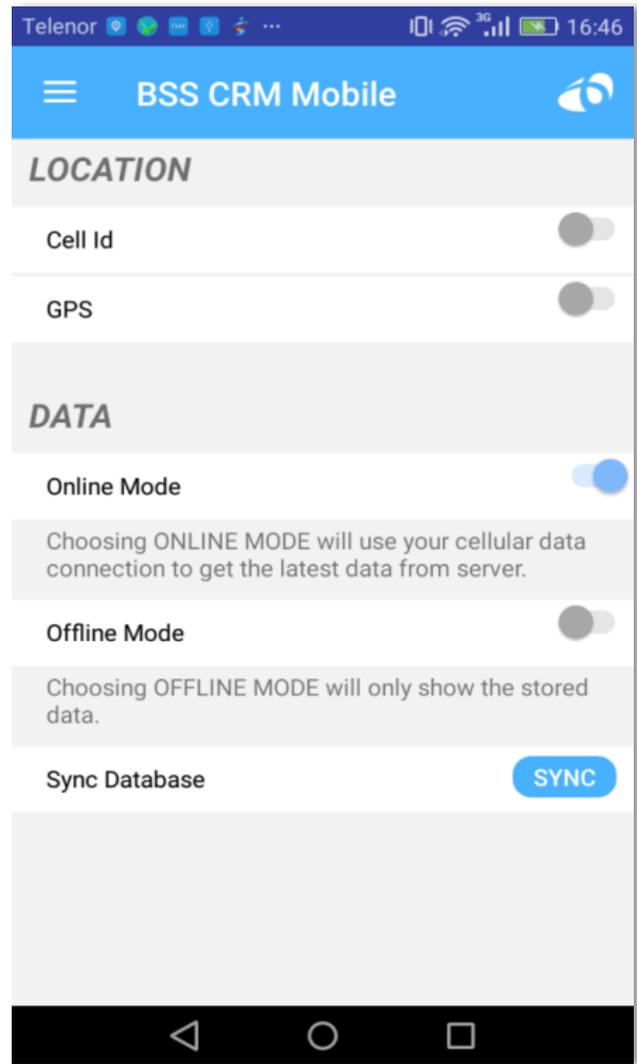
# Blue Stone CRM – Mobile Agent Mobile Agent Function List

- Blue Stone Solution supports field mobility, specifically for sales agents/representatives with to-do lists, communicate with Managers, get assigned work, etc.
- It also tracks current location and synchs information with the Server



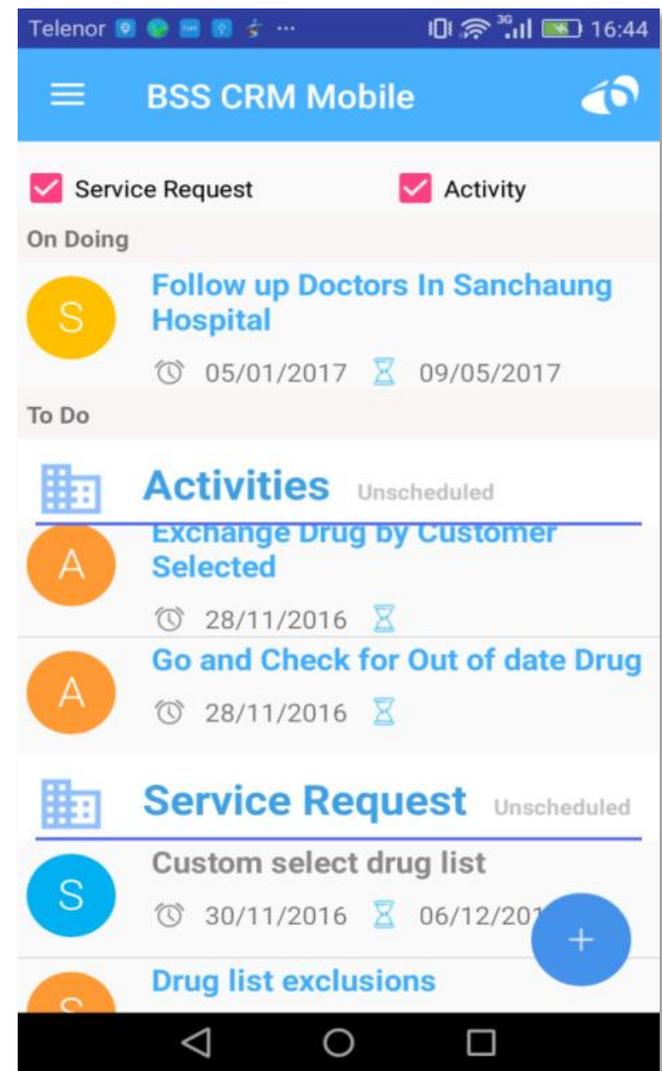
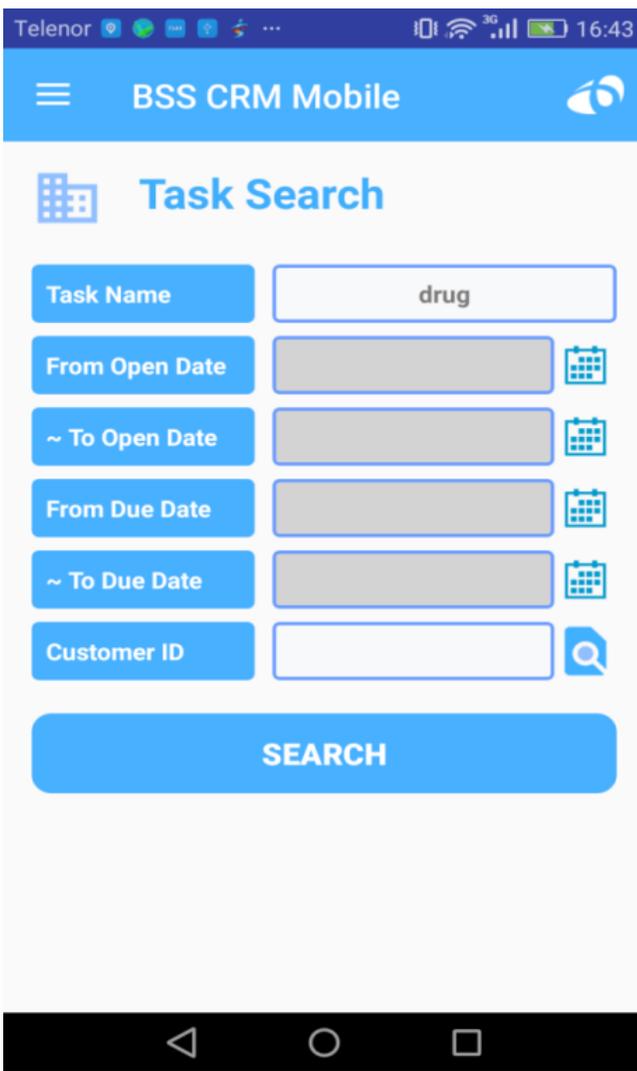
# Data Sync (Offline)

According to given physical situation (Offline and Online), task through Mobile Device can proceed as usual; and when user gets back to network area, data is synched automatically to the Server



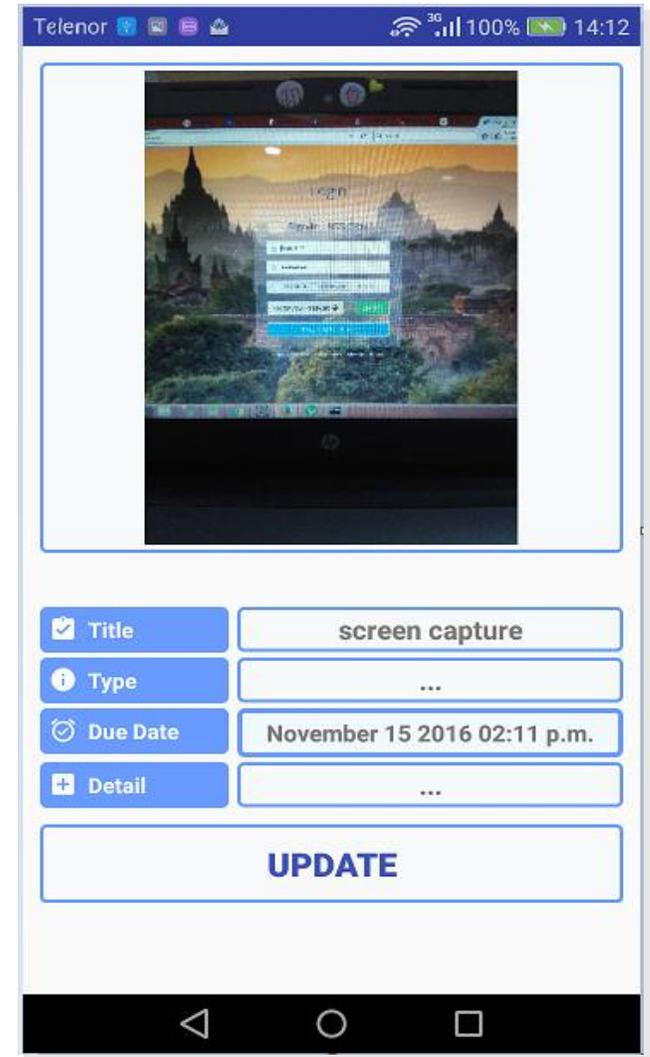
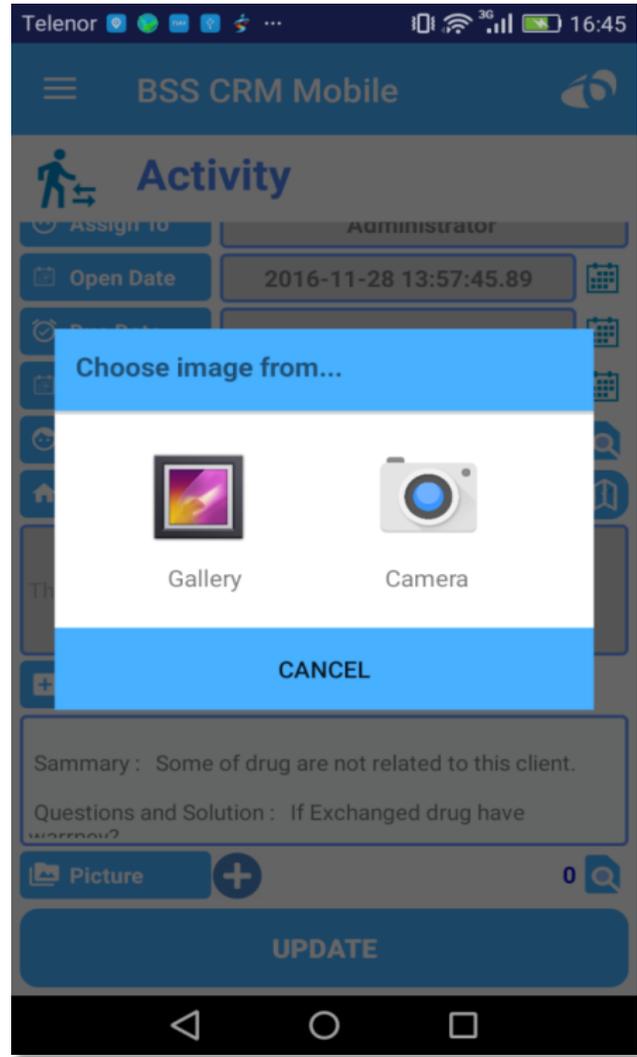
# Task Management

Search Task by require conditions and criteria; and be able to manage the assigned Tasks



# Attachment

After Completion of Task, In order to prove, Photo or picture taken can be attached to Task (Activity / Request )



# Blue Stone CRM – Mobile Agent

## Mobile Agent Function List : Screen Samples

Emergency calls... 0K/s 92% 1:04 PM

Administrator

- My Calendar
- Activity
- Route Management
- Product
- My Doctor
- Doctor Create
- Hospital
- My Pharmacy
- HCP Coverage**
- HCP Frequency
- Pharmacy Coverage
- Pharmacy Frequency

To Visit	Assign	Unassign
5	0	
12	0	
14	0	
18	0	
0	1	
7	0	
18	0	
11	0	
20	0	
1	0	
0	2	
8	0	
11	0	
106	0	
47	0	
1	0	
0	7	
26	0	
11	0	
38	0	
12	0	

App's Menu

BSS CRM MOBILE

### Activity

ACT Number: ACT-20180917-0068922

Status: Open

Type: Call

Accompany With: [Empty]

Assign To: Administrator

Plan Date: 2018-09-04 00:00:00

Actual Date: ...

Doctor: Moe Moe San

Hospital: Aung clinic (YGN)

Address: Aung clinic, 352 Maydarwi Street, North Okkalapa, Yangon

Detail

Activity

BSS CRM MOBILE

Month: September

MSR	%	Class	To Visit	Assign	Unassign
Aung Ko Ko Oo	100%	A	5	5	0
Aung Ko Ko Oo	100%	B	12	12	0
Aung Ko Ko Oo	100%	C	14	14	0
Aung Ko Ko Oo	38%	D	48	18	0
Aung Ko Ko Oo	0%	Null	0	0	1
Aung Ko Phy	78%	A	9	7	0
Aung Ko Phy	61%	B	18	11	0
Aung Ko Phy	63%	C	32	20	0
Aung Ko Phy	20%	D	5	1	0
Aung Ko Phy	0%	Null	0	0	2
Aye Nyein Thu	89%	A	9	8	0
Aye Nyein Thu	61%	B	18	11	0
Aye Nyein Thu	44%	C	106	47	0
Aye Nyein Thu	100%	D	1	1	0
Aye Nyein Thu	0%	Null	0	0	7
Aye Nyeint Thu	42%	A	26	11	0
Aye Nyeint Thu	32%	B	38	12	0

Activity Summary

BSS CRM Mobile

John Smith

ok

Nov 30, 2016 2:48 PM

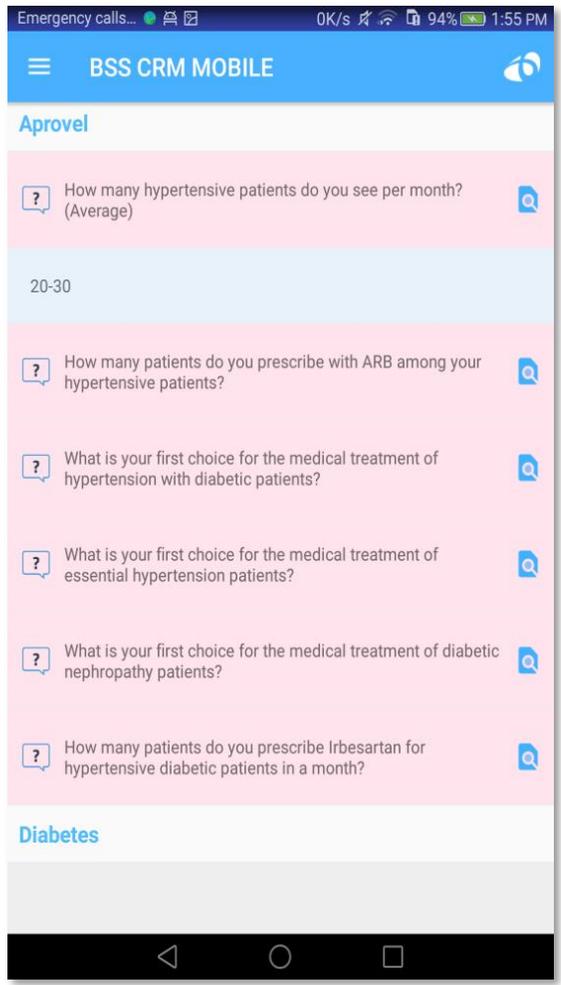
Hello

Feb 24, 2017 5:01 PM

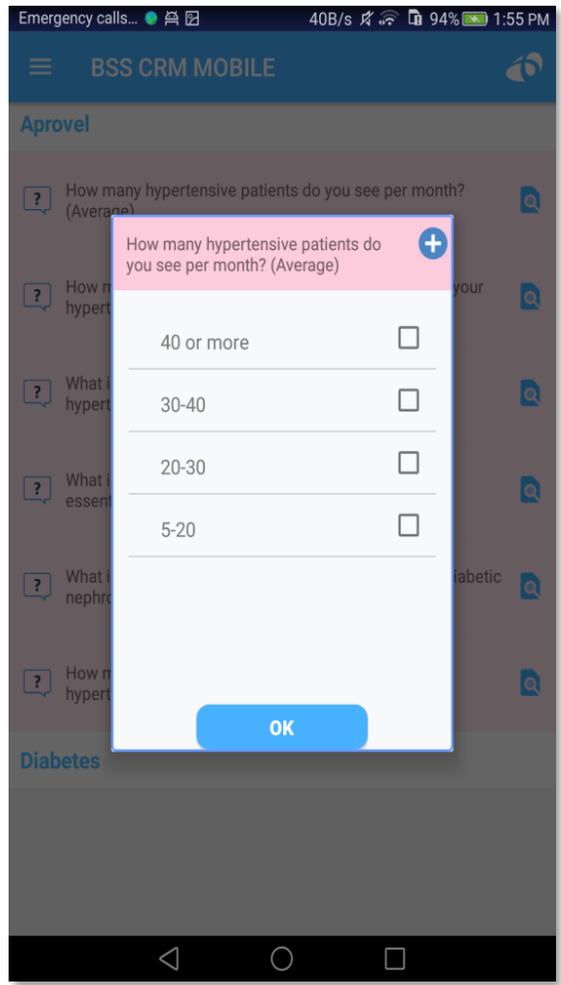
type message here...

Agent Chat

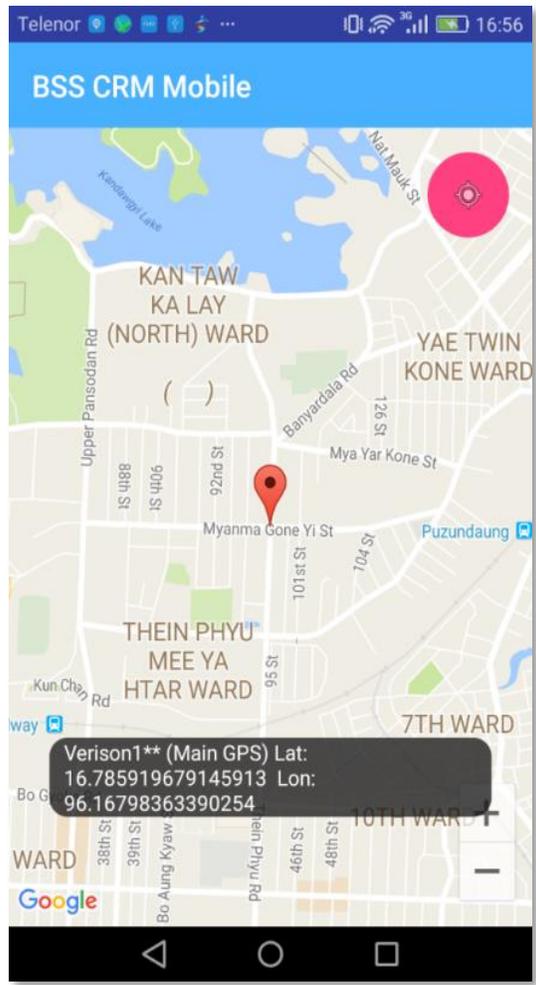
# Blue Stone CRM – Mobile Agent Mobile Agent Function List : Screen Samples



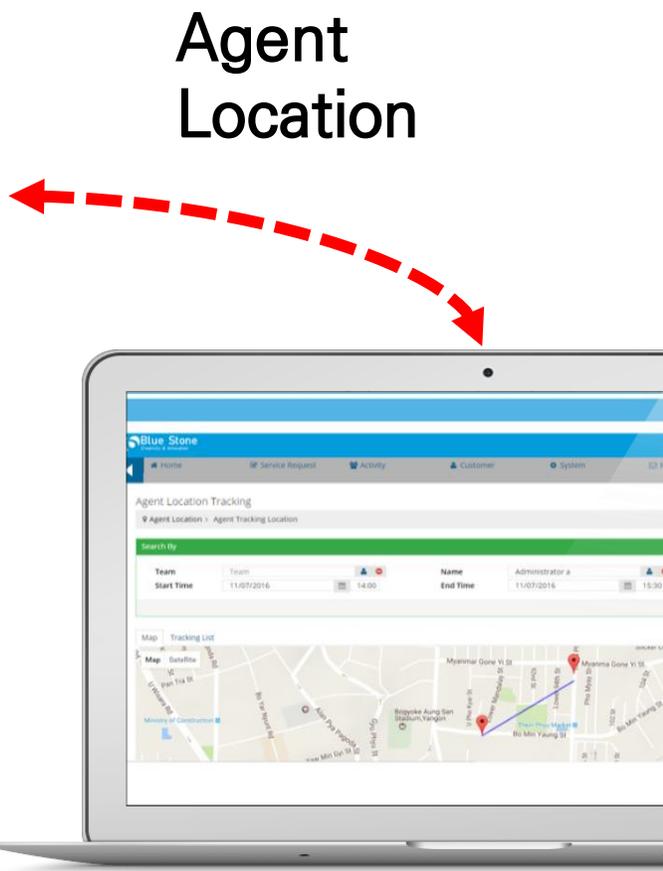
Survey (Questionnaire List)



Survey's Answers



Agent/Customer Location

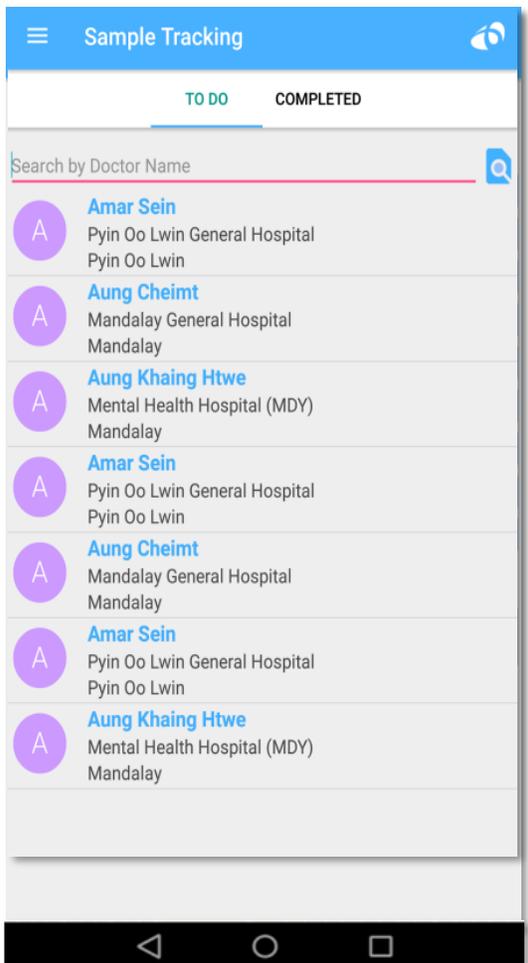


Agent Location

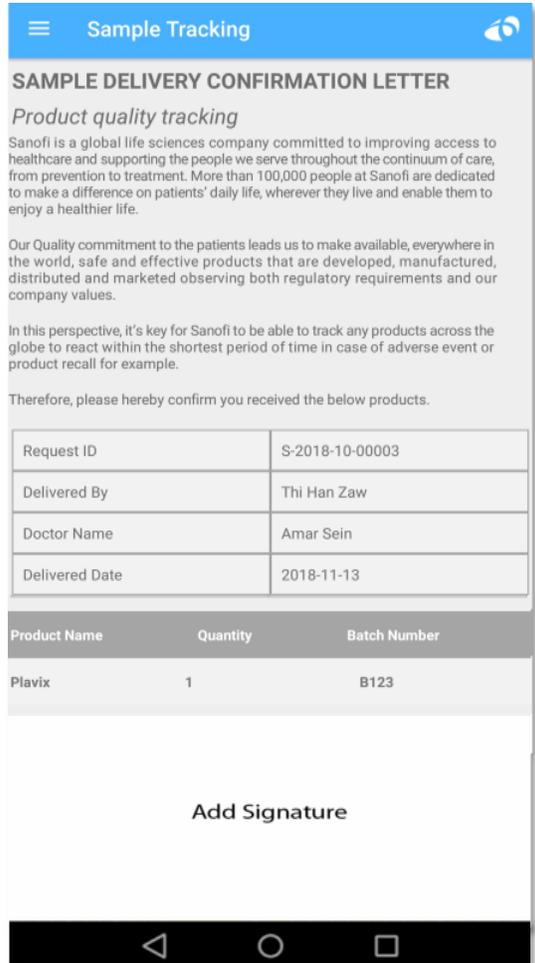
Agent can be tracked

# Blue Stone CRM – Mobile Agent

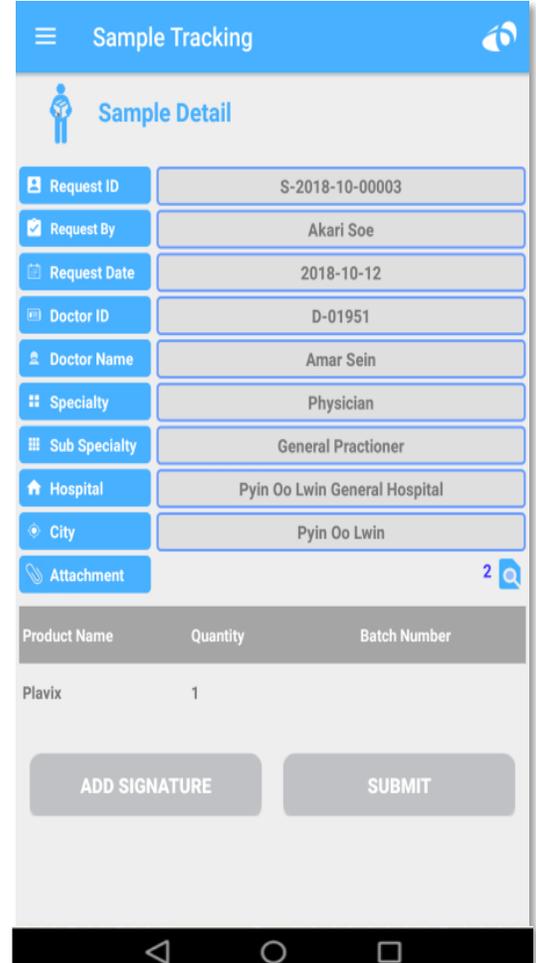
## Mobile Agent Function List : Screen Samples



Customer List



Customer Confirmation Letter



Confirmation on Sample



Signature on Confirmation



Thank You Very Much