

Modular Kitchen Studio CRM Flow

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Lead Generation (from Walking, Exhibition, Websites, and Other Sources)

Message to Customer, Message to Reference ---

(Lead No, Lead Date, Customer Name, Architect, Reference Thru, Interest, Contact Number, Contact Person for Order, Pin Code etc...)

Alerts to - Designer - Who attend its Or Mamta Ji Will decide – the designers name

Message Alerts to Respective Designer and Customer on same at a time – about Showroom - Visiting

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Lead Type (Civil or Modular)

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Lead Assignment

(Further assigned to the Sales Person; Alerts on WhatsApp and Dashboard)

Once Visit Done --- Thank You Message

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Follow Up (Salesperson prepares primary data after follow-up)

(Designer --- itself is a Sr. Sales Person) **Notification** – on next follow-up date, one day before and same day again to designer (Sr. Sales Person with follow Up subject mentioned)

After every follow up – auto alerts to customer

If order won and Order lost --- enter the reasons from predefined text drop downs

If not taken follow Ups – Show notifications on every Users dash board and alerts on same to a management

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Assign to Technician – Alerts to technician about client site, date and time and customer number --- Same time alerts to customer regarding the technician visit –

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Technician Initial Visit

(Based on primary data; alerts managed)

1. Architect will give direct design --- goes to quotation

2. Technical visit for making design --- design approval from validator --- and then further send to customer for approval --- once customer approval received --- then goes to quotation.
3. Technician will be upload the videos of customer site and final remarks --- all these details will be shown to associated designer --- and further the designer will be making design

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Measurement (MSM)

Further follow Ups to finalize the design --

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Designer

(Design prepared based on technician data)

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Further Follow Up

(Quotation prepared in Excel and sent to customer)

Final comments on, finishing of material to be used --- Select only from predefined text Drop Downs

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Quotation Module

(All required transaction alerts maintained here)

Based on the design inputs – the final quotation PDF will be uploaded -
Fields – Quotation No, Quotation Date, Amount , browse the PDF –

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Quotation Follow-up

(All required Alerts Notifications maintained)

After 1 days - Auto Message to Customer and Designer

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Quotation revise – add actual remarks --- (multiple follow Ups) --- then goes to Quotation department --- revised quotation make --- upload and authenticate --- **ORDER WON**

first auto alerts – i.e. thank you for your order to customer ---

next day notifications on '**do payment**' to customer -

second alert (if payment is not received or received less than 50% -

manual alert will be sent by designer - next notifications after 1 week (if payment not received)

if payment not done for next 1month – stop payment follow-ups – but keep the logs active as long as – then inactive --- then finally lost ---

(Show full stats on - all leads / enquiries data as - Hot , Warm And Cold)

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Accounts (Part Payment receipt confirmation)

Once payment received ---- new order id generated ---

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Final Measurement

(Alert to person with visit date)

Final Drawing / PPT --- send to client for approval --- all respective persons sign ---

In some cases – PPT goes before in advance before payment received

Here PPT number is very very important. This is unique – once PPT is approved by customers, signed by designers, and accounts department --- the final order freeze -- 50% advance payment confirmation

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Order Generation / BOM Preparation

In some cases – later PPT changes possibility

4 pages – shutters (H W L) , Carcass (H W L) Hardware changes etc..

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Order Approval (Alert to Supervisor)

Again measurement – Validator login to validate it

From here deadline start on order completion

From here operations start --- Auto date generates as per material dispatch --- It's a predefined dates generated by system --- Mamta Ji will monitor henceforth –

Timeline of 45 days to maintain – Here stage wise declaration is must ---

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Accounts Confirmation (Final Payment Receipt)

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Vendor Assignment – Factory|

(Factory Login → Order View → Dispatch Module → Dispatch to Site) -

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Vendor Assignment -

3rd Party (Warehouse Login → Order View → Material Received Entry → Dispatch to Site)

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Carpenter Assignment

(Auto-assign to carpenter; alerts on and before visit) _ Provision to change the carpenter as

per availability – carpenter selection from dropdown – system will show who is busy and suggest who is next available - as per predefined priority list from drop down

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Installation & Daily Work Upload

(Carpenter can upload work photos)

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WCC Module

(Customer Sign Upload)

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Master Modules:

Users Masters, Vendors Masters, Architects Masters

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Snag List

Service Module:

All data will be shown for the customer id as per order id, installation date, validity (free service time) --- Service Order number (unique) – Service details captured and updated as per service work done ---

This document is prepared as per the meeting held at Kitchen Studio Andheri Showroom:

Meeting Date: 24th April 2025.

Meeting Between:

Mr. Prajit N. , Ms. Mamta (KITCHEN STUDIO)

Rajesh B, Rupali B. Jyoti P. (SAHAVAS TECHNOLOGIES)