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CRM

Project & Service CRM

Run a job from the first site visit to the last rupee collected — survey, design, costing, orders, installation, handover, tickets and Tally-linked collection.

For firms whose work happens at somebody else's premises — signage and LED display, interiors and fit-out, audio-visual, IT rollout, branch and site works. A job in that business is not one transaction; it is a survey, a drawing, an estimate, a client order, a vendor order, a dispatch, an installation, a sign-off, a licence, an invoice and a payment, passing through four or five departments and taking weeks. This holds the whole of it in one place, in a browser, on whatever device the person is holding.

One job, from enquiry to closure

Every stage is its own screen, and each one carries the job forward rather than starting again:

- **Client requirement and site survey** — where a job begins, with type of work, recce scheduled and completed dates, and the staff assigned; each person ticked gets the reminder on their own login the moment it is saved
- **Design and artwork approval** — shared date and approval date, against the same survey
- **Costing, BOQ and commercial approval** — estimate value, shared and approved dates, and the client's own purchase order reference
- **Project kick-off** — where the **job number is allocated**, in a format that reads Month-Year / Company / Client / Running Number, and becomes the reference for everything after it
- **Procurement and dispatch** — material dispatch and expected arrival, print file received, vendor and contact
- **Production and installation** — installation plan date, scaffolding, fabrication, cabinet installation, electrical connection, go-live date and the technical detail of what was installed
- **Quality check and client handover** — work completion certificate and client closure date
- **Project closure** — closure date and final status
- **Licence and government approval** — tracked in its own right, per authority: applied, received, installed and **expiry** dates, so a renewal is never discovered after it lapses

Before the job number exists, an automatic survey number ties the early screens together, and the switch happens at kick-off. A job can be found by its number directly, or by picking company, then client, then branch.

Orders, both directions

- **Sales order and proforma invoice** — billed-to client and shipped-to branch as separate things, the client's own PO number and date, line items with HSN and GST from the material master, CGST/SGST/IGST split per line for intra-state against inter-state, advance percentage, terms and your own bank details printed for the client to pay against
- **Purchase order** on the vendor — payment and delivery terms, validity, freight, due date, line items priced by square foot or by unit, totals and round-off computed, and the authorised signatory block printed
- Both are documents in their own right: printable, e-mailable, and each with its own register

Tickets, SLA and escalation

One screen covers general tasks, complaints, change requests and warranty claims — the type is picked and the fields specific to that type appear:

- **Response time per ticket type**, so a display failure and a routine request are not held to the same clock
- Assignment to one or more people, each notified on their own login the instant it is saved
- **Escalation up the reporting line** when a ticket passes its hours, with an escalation report that shows what breached, by how long and whose it now is
- On login, every user gets a popup listing their open tickets and reminders — and anything assigned while they are already logged in pops up as it happens

The messages people actually send you

Most work does not arrive as a form. It arrives as a WhatsApp message or a mail, and somebody retypes it. This handles that directly:

- **WhatsApp on your own business number** — messages sent to the number your customers already have saved arrive in the software as they are sent, over the official WhatsApp Business Platform. Nothing to install, nothing running on somebody's desktop
- **Mail** from your shared support inbox, read into the same queue, with attachments
- Each raw message sits in a work queue with its sender, time and text; a **keyword list you maintain** reads it and suggests which screen it belongs to and which job it is about
- The operator accepts or changes that suggestion, and the right screen opens **inside the queue** — the message becomes a ticket, a survey, a design approval or a costing entry without leaving it
- **Nothing becomes work on its own.** A person confirms every one. The suggestion is a shortcut, not an automation

Tally, read both ways

Invoices and GST stay in Tally; this reads what Tally already has, matched on the same job number you already use as the cost centre:

- **Vendor bill verification** — bills received, hard copy status, PO reference, vendor invoice and date, taxable, GST and total, query and response dates, delay reason, booking status, voucher number, payment status, UTR and amount paid

- **Payment collection and follow-up** — invoice, taxable value, tax, grand total, payment date, amount received, TDS and balance
- Both screens have an **Import from Tally** button that lists what is there; rows are ticked and brought in one at a time. Nothing is imported silently
- Imported rows are not locked — remarks, delay reasons and status fields stay yours to fill
- Client outstanding and vendor outstanding, in the same software as the job that created them

The opening screen

- **Management view** — messages received today against how many are already turned into work, jobs running late at their current stage, licences about to expire, money clients owe you, money you owe vendors, and unprocessed messages still waiting
- A **job pipeline funnel** showing how many jobs sit at each stage, so it is obvious where work is piling up; ticket load by type, with anything past its response time called out
- **Today's activity** — for every master and every job stage, what was added and what was changed today, so nothing moves anywhere in the system unnoticed
- **Overdue and needs-attention lists** — not counts but the actual rows: which client, which job, how many days, ready to act on
- Job volume by branch and by job type; recently closed jobs
- **Personal view** — the signed-in user's own tasks, reminders and pending items, first thing

Reports and getting data out

- Daily, weekly, monthly and KPI reports; job summary with purchase value against sale value per job
- **Job cards in two views per job type** — the CRM view carrying the key date and status from every stage, and the operations view carrying the installation and technical detail
- Purchase order and sales order registers; licence status; warranty and AMC expiry; stage-wise turnaround compliance
- **Ask a question in plain English** and get the answer back as a table you can export — for what nobody thought to build a report for
- Every entry screen doubles as its own report, with **Excel** and **Send by Mail** on it
- **All-in-One Excel** — one click, one workbook, one sheet per module; an administrator gets every sheet, everyone else gets only the sheets their rights allow

Throughout

- **Rights per user on every screen** — view, add, edit, delete and report are separate grants, and a report a user may not see is not on their menu at all
- **Document attachment and comments on every master and every entry**, checklist-driven by document type

- Masters for client and contacts, branch or site, department, employee (which is also the login list), material and material group, vendor and vendor type, ticket type, document type, government authority and company
- The same screens re-arrange to fit a phone or tablet — **no separate mobile app to install**

Technical details

- .NET 9 Blazor, browser-based, on Microsoft SQL Server
- Hosted or on your own server; reachable from any browser, nothing installed per machine
- Integrations: Tally, WhatsApp Business Platform, SMTP mail

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