

Major Product Category- Data management and Query software (UNSPC Code: 43232300)	<u>GeM3.0</u>
Product Name - Customer Relationship Management Software (UNSPC Code: - 43232303)	

BASIC INFORMATION

S.No	KEY	TYPE	RESTRICTIONS	PARAMETERS
1	Software Domain / Type	Enumerable	Customer Relationship Management Software	Golden
2	Types of Licence	Enumerable	Perpetual, Annual Subscription	Golden
3	Deployment option	Enumerable	On premises, Cloud	Golden
4	Maximum user handling capability	Enumerable	Upto500,Upto1000,Upto2000,Upto 3000,Upto5000,Upto 8000, Upto 10000, Above 10000	Filter
5	Installation	Boolean	YES,No	Golden
6	OEM Model / Part No.	Text		Mandataory
7	Brief Description of the Software Product	Text		Mandataory
8	Software Version	Text		Mandataory
9	Date of Launch of Version	Text		Mandataory
10	Number of Years upto which Support is available from OEM / Seller	Enumerable	1,2,3,5	Golden

CUSTOMER SERVICE FEATURES

11	Customer service features in the offered product	Enumerable	1. Customer backup and restore 2. Customer Insights service 3. Data Export service 4. Document suggestions 5. Customer activity and connectivity status 6. Customer Priority Classification 7. Escalation Matrix and Case classification 8. Multi-channel contact center 9. CTI Integration (Computer Telephony Integration) 10. IVR Integration(Interactive Voice Response) 11. Interaction logging 12. Integrated Knowledge Management 13. Real-time appointment booking and scheduling 14 .Inventory management 15. Contract and agreement management 16. Field Service 17. Self-service portals for non-CRM audience. 18. Project-based sales with project service capabilities. 19. Remote service with field service capabilities. 20. SLAs for custom entities and other system entities. 21. Track progress of SLA KPIs with timer control. 22. Integrated with Unified Service Desk. 23. Merge cases. 24. Add iFrames and web resources. 25. Configure lookup field properties to show filtered records.	Golden (Multiselect)
----	--	------------	--	----------------------

			<ul style="list-style-type: none"> 26. Access forms and dashboards using keyboard navigation. 27. Integrated with interactive service hub. 28. Telemetry. 29. Use surveys to collect feedback from customers. 30. Prioritize workloads with new interactive service hub dashboards and forms . 31. Reduce case call-handling time with rich knowledge management articles. 32. Dynamic Assignments. 33. Parts Availability . 34. Connected & Disconnected Mobile Service . 35. Service Analytics . 36. Help Desk . 37. NA 	
--	--	--	---	--

CRM CONNECTORS & APP

12	CRM Connectors and Apps features in the offered product	Enumerable	<ul style="list-style-type: none"> 1. CRM administration 2. App for e-mail enhancements 3. Editable grids 4. Field Service enhancements 5. Gamification 6. Learning Path (guided help) customization 7. Link CRM business object types to a case like Problems and Solutions form Knowledge base, products, base components, etc 8. Case Hierarchies to manage similar cases 9. Case Management to set child status to cases under a header 10. NA 	Golden (Multiselect)
----	--	------------	--	----------------------

MOBILE FEATURES

13	Mobile features in the offered product	Enumerable	<ul style="list-style-type: none"> 1. Mobile homepage with Relationship Insights. 2. Mobile management enhancements. 3. Mobile Offline Data API . 4. Mobile UI productivity. 5. Modular business apps. 6. Online customer backup and restore. 7. Partner Portal enhancements. 8. Portal service enhancements. 9. Relationship Insights (Features include Email Engagement, Auto Capture, and Relationship Assistant). 10. Relevance Search. 11. Resource scheduling optimization. 12. Scheduling unification. 13. Task-based experiences. 14. Threat management with SIEM. 15. Visual process designer. 16. Rich mobile offline experience. 17. Mobile devices conditional access. 18. Service reps search for, view, create, and edit knowledge articles. 	Golden (Multiselect)
----	---	------------	--	----------------------

			<p>19. Sales professionals manage quotes, orders, and invoices.</p> <p>20. Manage mobile devices with Intune without enrolling the device.</p> <p>21. Export data to Excel from CRM for phones and tablets.</p> <p>22. Email a link to a page from CRM for phones and tablets.</p> <p>23. Provide modern user interface with the new visual controls in CRM for phones and tablets.</p> <p>24. Use iFrames and web resources in CRM for tablets.</p> <p>25. Faster mobile app preparation after customization.</p> <p>26. NA</p>	
--	--	--	--	--

PRODUCTIVITY FEATURES

14	Productivity features in the offered product	Enumerable	<p>1. Learning Path guided help (runtime experience only)</p> <p>2. Email signatures for CRM users and teams</p> <p>3. CRM App for e-mail tracking .</p> <p>4. Track email activities automatically with mail folder tracking .</p> <p>5. Word templates.</p> <p>6. Excel templates.</p> <p>7. Monitor mailbox health using the improved server-side synchronization performance dashboard .</p> <p>8. Server-side synchronization - track emails, appointments, tasks, and contacts immediately when manually tracking from CRM Mail applications .</p> <p>9. Integration with Document collaboration software..</p> <p>10. IM and Audio/Video conferencing integration with software .</p> <p>11. NA</p>	Golden (Multiselect)
----	---	------------	--	----------------------

EMAIL & SMS INTEGRATION

15	Email & SMS Integration Features in the offered product	Enumerable	<p>1. Client and Server based Groupware(Outlook/Lotus Notes) integration .</p> <p>2. Monitor mailbox health using the improved server-side synchronization Performance dashboard.</p> <p>3. SMS integration for sending status updates.</p> <p>4. NA</p>	Golden (Multiselect)
----	--	------------	--	----------------------

INTELLIGENCE

16	Intelligence Features in the offered product	Enumerable	<p>1. Cloud-based Machine Learning product recommendations</p> <p>2. Cloud-based Machine Learning knowledge base suggestions</p> <p>3. NA</p>	Golden (Multiselect)
----	---	------------	---	----------------------

ANALYTICS

17	Analytics features in the offered product	Enumerable	<ol style="list-style-type: none"> 1. Organization Insights Dashboard shows system usage stats. 2. Pre-built CRM analytics. 3. Visual Dashboard . 4. Customizable dashboards. 5. Predictive Analytics. 6. Easy to use ad hoc query analysis. 7. Data Visualization. 8. Mobile Enable Analytics. 9. Scorecard & Strategy Management. 10. NA 	Golden (Multiselect)
CUSTOMIZATION				
18	Customization Features in the offered product	Enumerable	<ol style="list-style-type: none"> 1. Feedback and ratings on entities. 2. Customer field for any entity. 3. Define business rules based on business process flows. 4. Call custom actions from workflows or dialogs. 5. Define rules for creating or updating CRM records from incoming activities. 6. Calculated field enhancements. 7. Use solution segmentation for tighter control of solutions exports and patches. 8. Query load time optimization. 9. Add New applications. 10. Add New Screens. 11. Add new Fields. 12. Create new web service. 13. Expose web service. 14. ReST API Catalog. 15. Create Tables. 16. Multi-Developer Support and Agile environment. 17. Hide fields. 18. Create workflows. 19. Browser based development. 20. NA 	Golden (Multiselect)
SDK (SOFTWARE DEVELOPMENT KIT)				
19	SDK Features in the offered product	Enumerable	<ol style="list-style-type: none"> 1. Create customer attributes for any entity. 2. Filtering records based on single-value navigation properties. 3. Retrieving related records for entity sets by expanding single-value navigation properties. 4. Enhanced client API support in interactive service hub. 5. Support for knowledge base search control client APIs on CRM mobile clients and the interactive service hub. 6. Easily launch the interactive service hub using the CRM SiteMap. 7. Apply SLAs to custom entities and specific system entities in CRM. 8. Categorize entity records in CRM. 9. Provide feedback and rating for entity records in CRM. 10. Control how packages are deployed with the enhanced Package Deployer. 11. XRM tools enhancements for connections to CRM. 12. Simplified FormXML for Stream items in the interactive dashboards. 13. Entities updated for improved form rendering experience and new client APIs support. 14. Integrate CRM with external event hub publishers. 15. Multiple message execution. 16. Optimistic concurrency. 17. Record creation and update rules. 18. Rollup field enhancements. 	Golden (Multiselect)

			<ul style="list-style-type: none"> 19. Tracing. 20. Support for additional “older than” clauses for date and time fields in FetchXML and QueryExpression . 21. Track emails at the folder level. 22. Enhanced capabilities for sub-grid controls in forms. 23.NA 	
NAVIGATION & USER INTERFACE				
20	Navigation & User Interface Features in the offered product	Enumerable	<ul style="list-style-type: none"> 1. Move around CRM using the new navigation bar and menu system. 2. Multiple colour themes. 3. Rename menus. 4. Change tab sequence. 5. Pre-defined queries for screens. 6. Column sorting. 7. Column Freeze. 8. Column re-ordering. 9. Navigation search. 10. Modifiable home page. 11.NA 	Golden (Multiselect)
CRM MARKETING				
21	CRM Marketing feature in the offered product	Enumerable	<ul style="list-style-type: none"> 1. Marketing Resource Management. 2. Campaign Management . 3. Email, Web and Mobile Marketing. 4. Events Management . 5. Response and Lead Management. 6. Partner & Channel Marketing . 7. Loyalty Management. 8. Real-time decisioning. 9. Marketing Calendar . 10. Marketing Project Management . 11. Marketing Budgeting & Expense Management . 12. Marketing Analytics. 13. NA. 	Golden (Multiselect)
CRM FEATURE FOR PUBLIC SECTOR				
22	CRM for public sector feature in the offered product	Enumerable	<ul style="list-style-type: none"> 1. Citizen centric case & policy management . 2. Low code policy definition . 3. Eligibility & Determination. 4. Application Intake. 5. Application Assessment. 6. Entitlement calculations & payments. 7. Citizen view of cases. 8. Effective Dating. 9. Master Cases . 10. Self-service. 11. Appeals Management . 12. Case time keeping . 13. Case Analytics. 14. Performance Management. 15. Integrated citizen data management . 16. De-dup capability. 17. Real time duplicate finder. 18. Data Quality. 19 Data Governance. 20. Citizen 360 view . 21.NA 	Filter (Multiselect)

CONTACT CENTER

23	Contact centre feature in the offered product	Enumerable	<ol style="list-style-type: none"> 1. Multi-channel contact center . 2. Universal softphone (call, email, chat, SMS). 3. Inbound & outbound Communicatoin. 4. Interaction loggin. <ol style="list-style-type: none"> 5. Auto pop up. 6. Security Questions. 7. Task Based User interface. 8. Agent Scripts. 9. Automated email response. 10. Auto case creation from email . 11. Merge & de-merge of citizen master. 12. Source system confidence 13. NA 	Golden (Multiselect)
----	--	------------	---	----------------------

SUPPORTED HARDWARE REQUIREMENT PARAMETERS

24	Min. RAM Size required	Text		Mandataory
25	CPU required	Text		Mandataory
26	Other specifications, if any	Text		Mandataory
27	Operating Systems supported	Text		Mandataory
28	Supported Technology/ Platform	Text		Mandataory
29	Supported Databses	Text		Mandataory
30	Supported Web Browsers	Text		Mandataory
31	Supported Servers	Text		Mandataory

GENERIC PARAMETERS

32	Free Upgradation to Higher Version within support period	Enumerable	YES	Filter
33	Valid Licence copy to be provided	Enumerable	YES	Filter
34	Software supplied through	Enumerable	Media,URL Link,Media & URL Link,Pre-loaded	Filter
35	Certifications / Benchmarking of Software Products	Text		Mandataory
36	List of items included in the package	Text		Mandataory
37	Hyper link to Data sheet	Text		Mandataory
38	No of Software sold	Numeric	1-10000	Filter
39	Number of Software deployment/Installed in Govt. Department from OEM	Numeric	0-1000	Filter
40	Details of Government Department email, phone no.Of concerned authority where Software /Appliance installed for above	Text		Mandataory





