

CRM System Dev for Underground Utility Solutions Firm

PROJECT DETAILS



Custom Software Development, CRM Consulting and SI



Sep. 2025 - Nov. 2025



\$10,000 to \$49,999



"The team was patient and cooperative, providing professional guidance and valuable recommendations."

PROJECT SUMMARY

UpCodo Digital developed an underground utility solutions firm's CRM system. They built a cloud-based web app, created a support ticket module, added a unified customer database, and integrated key features.

PROJECT FEEDBACK

UpCodo Digital delivered a fully functional CRM system. They also offered professional guidance and valuable recommendations throughout the design process. Moreover, the team impressed the client with their patience, cooperation, good service, and quick responses. They also communicate via email.

The Client

Please describe your company and position.

I am the Manager of an underground utility solutions firm.

Describe what your company does in a single sentence.

provide underground utility solution

 Manager,
Underground Utility
Solutions Firm

 Construction

 Malaysia

The Challenge

What specific goals or objectives did you hire UpCodo Digital to accomplish?

- to create a CRM integrated with Ticketing system

CLIENT RATING

5.0

Overall Score

Quality: 5.0



Schedule: 5.0



Cost: 5.0



Would Refer: 5.0



The Approach

How did you find UpCodo Digital?

Online Search

Why did you select UpCodo Digital over others?

- High ratings
- Pricing fit our budget
- Good value for cost

How many teammates from UpCodo Digital were assigned to this project?

2-5 Employees

Describe the scope of work in detail. Please include a summary of key deliverables.

1. Project Overview

The goal of this project is to design and implement an online Customer Relationship Management (CRM) system that enhances the efficiency of the sales process and provides an integrated support module for handling repair or service requests.

The system will allow the company to track sales activities, manage customer relationships, and handle after-sales service tickets in a single centralized platform. By connecting sales and service workflows, the system aims to improve communication between teams, reduce manual work, and ensure every customer interaction — from lead generation to post-sale support — is recorded and easily accessible.

2. Objectives

Increase sales efficiency by automating lead and opportunity management.

Provide real-time visibility into customer status, sales progress, and follow-up actions.

Enable tracking and management of repair or service tickets



linked to customer profiles.

Improve coordination between sales and support teams through a unified data platform.

Enhance customer satisfaction and retention through faster response and transparent service tracking.

3. Project Scope

3.1 CRM (Sales Management Module)

Customer & Contact Management:

Create and manage customer profiles and related contacts.

Maintain a complete history of communication and transactions.

Link customer details to both sales and support records.

Lead & Opportunity Tracking:

Record and monitor sales leads through defined stages (prospect → qualified → won/lost).

Assign leads to sales representatives and set reminders for follow-ups.

Log quotations, deals, and order history.

Sales Dashboard & Reporting:

Provide sales performance analytics (e.g., pipeline value, conversion rate).

Generate reports for individual and team performance.

Real-time KPI tracking and goal progress visualization.

3.2 Support / Ticketing Module (Repair & Service Management)

Ticket Creation:

Automatically create a support or repair ticket when a service request is received (via email, web form, or internal entry).

Link each ticket to the corresponding customer and product.

Ticket Tracking & Assignment:

Assign tickets to technicians or support staff.

Track progress through stages (Open → In Progress → Completed → Closed).

Manage priorities and service-level timelines (SLAs).

Repair Work Management:

Record repair details, parts used, and costs.

Track return status, technician notes, and customer



confirmations.

Notification & Escalation:

Automated notifications for ticket updates and completion.

Escalation rules for overdue or pending cases.

3.3 System Integration & Features

Unified Customer Database: All sales and support data are tied to a single customer profile.

Activity Log: Track every action (email sent, quote issued, repair logged) in the customer timeline.

Task & Reminder System: Allow users to set reminders for calls, meetings, and service follow-ups.

Role-Based Access: Define permissions for Admin, Sales, Support, and Management roles.

Reports & Analytics: Generate summary and detailed reports for both sales and support performance.

4. Technical Specifications

Platform: Cloud-based web application (desktop & mobile responsive).

Technology Stack:

Frontend: React / Vue.js / Angular

Backend: Node.js / Python (Django or FastAPI)

Database: PostgreSQL / MySQL

APIs: RESTful API for integration with other tools (e.g., accounting, email, or inventory systems).

Hosting: AWS / Azure / Google Cloud

Security:

User authentication (OAuth2 or SSO)

Data encryption (in-transit and at-rest)

Regular data backups and access logs

5. Deliverables

Fully functional Online CRM with integrated Sales and Support modules.

User authentication and role management system.

Customer and contact management interface.

Ticketing and repair workflow module.

Sales dashboard and reporting tools.
API documentation and integration support.
UAT (User Acceptance Testing) and training.
Deployment and post-launch maintenance.

The Outcome

What were the measurable outcomes from the project that demonstrate progress or success?

the online CRM system have been successfully delivered and working smoothly

Describe their project management. Did they deliver items on time? How did they respond to your needs?

the team is delivering good services and quick respond.

What was your primary form of communication with UpCodo Digital?

- Virtual Meeting
- Email or Messaging App

What did you find most impressive or unique about this company?

The team was patient and cooperative, providing professional guidance and valuable recommendations throughout the system design process.

Are there any areas for improvement or something UpCodo Digital could have done differently?

nope