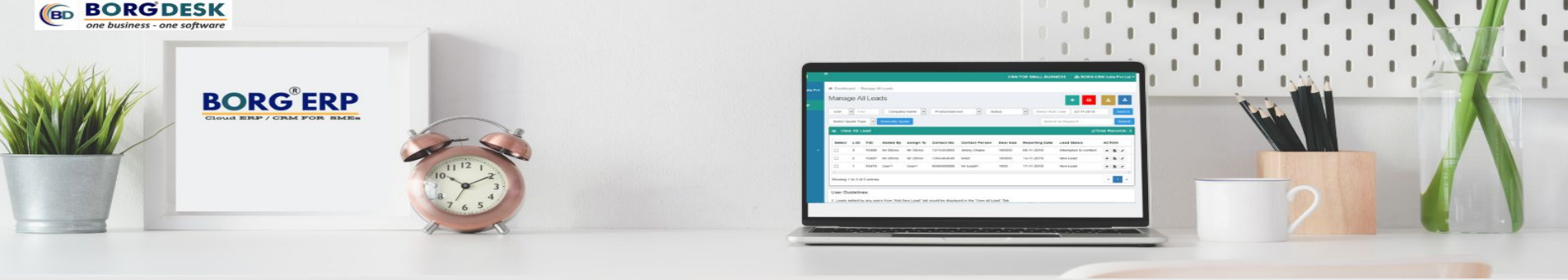


BORG DESK

Integrated Customer Support Desk

Goodpick Technologies Pvt. Ltd (Since 2017)

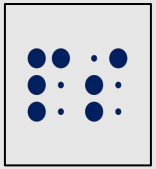
www.borgdesk.com

DPIIT : DIPP86216 | MSME: DL02E0004658

Present issues with small & Mid-Size Businesses

Expensive Solutions for SMEs

Budget is key factor for SMEs to go for any ERP system for their business so it remains big challenge



Team Compatibility (Complexity)

Complex Connect between software & Team capabilities becomes complex during implementation so it gets failed on midway

Meshed operation system

departments are not integrated with each other in single login interface to ease out sharing of data & thus no standard System

No Unified Communication

Current system not filling the today's customer expectations due to lack of Multi-channel

Bad Customer Experience

Call Centers not integrated with service desk & CRM to track customer experience & their history

Immature Decision Making

Structured data (Business Reports) is not available quickly for right decision making in single interface

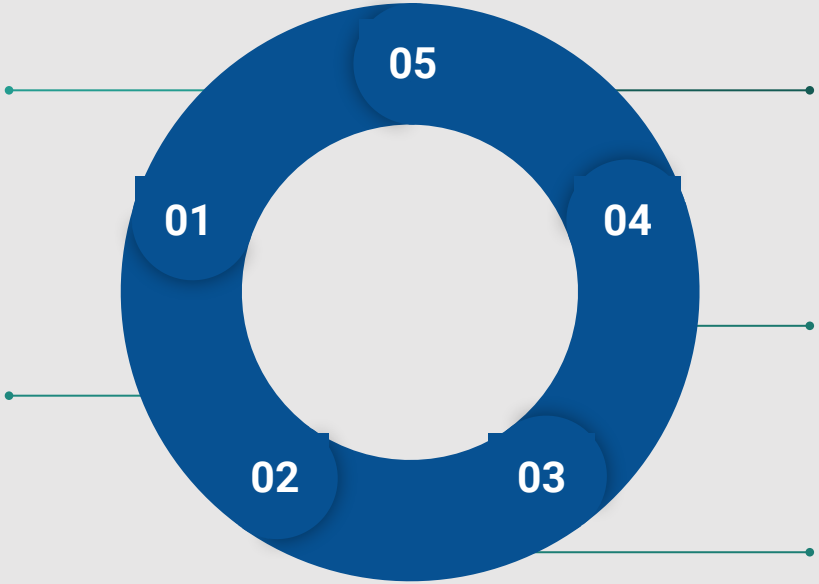
Solutions by Integrated Borg Desk ERP

Cost Effective All in One SaaS Based ERP Software

BORG is very cost effective user licensing based cloud hosted application, It removes barrier of office location & gives the best support for Work From Home (WFM) & Work From Remote. It gives more visibility of data so helps management to take care of risk.

Easier Implementation in the process with little hand holding

BORG user interface is very simple & upgraded version of excel / google sheets which makes very compatible with team capabilities. Step-to-step guide requires only little hand holding by borg partners.



Streamline Operations - Bridging the gap among team members & Faster Decision making

BORG connect Business Process departments with each other thus sharing of data among team members becomes easier & Subsequently, each person can act faster on any information they receive

Forecasting & Analytics

Facilitates business owners to track their business in real time round the clock from anywhere with access of hundreds of business reports. It's very effective decision support system

Enhance Customer Experience & Risk Management

Facilitates customers to connect with support team via multiple channels like tickets, chat, whatsapp etc. followed by contract Management(**Customer History at One Go**). It gives more visibility of data so helps management to take care of risk.

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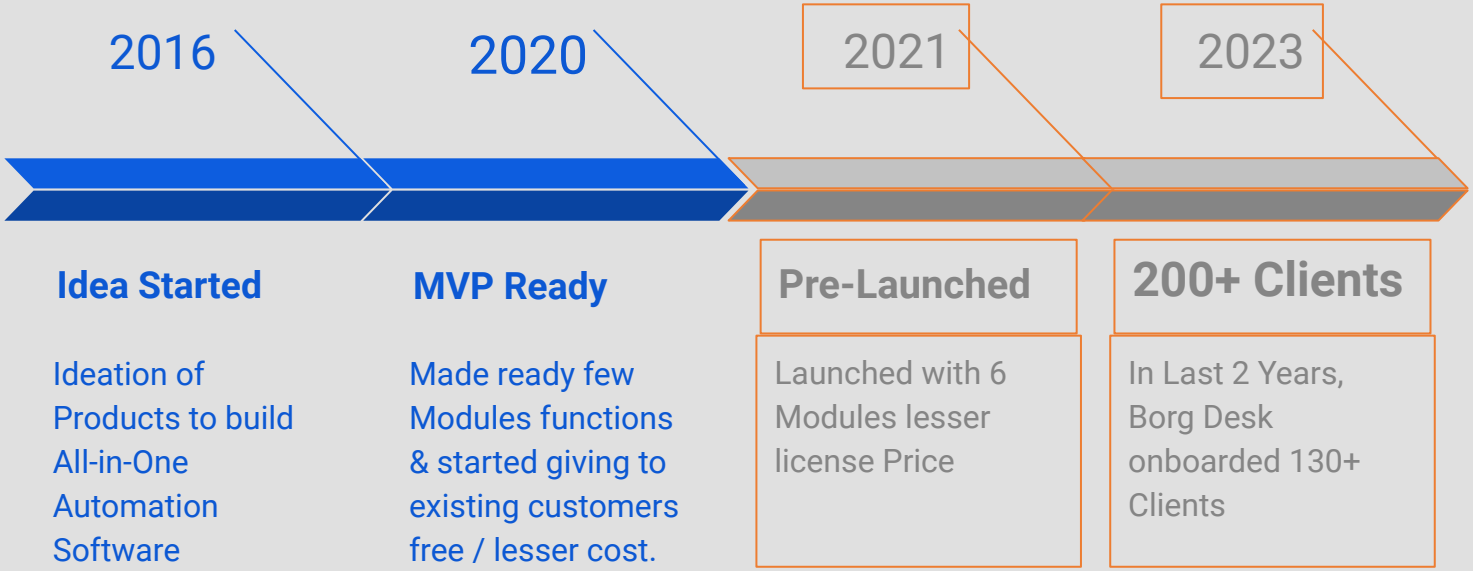
www.borgerp.com

Product - BORG DESK ERP

Small & mid-size companies are very cost sensitive & complex in process. BORG Desk helps B2B Sales/Service & Supply Chain companies to automate their process and improve their customer service, team productivity, manage risk across their supply chain with very affordable cost.

Integrated Borg Desk helps to hack business growth with process automation capabilities.

Borg Desk Journey



The Team Behind

KP Singh

Founder CEO

16+ years of hands-on experience in IT, Customer Service, Sales, Strategy & Business Development

Sanyokta Baghel

Co-Founder & COO

9+ years of hands-on experience in Business Operation & Service Delivery.

BorgDesk Future Roadmap

- Integration with more Global ERP/CRM for enhancing capabilities
- GPS enabled tracking for field technician to improve efficiency
- AI Based Integrated Chat Bot to delight customers
- AI Based helpdesk for ticket distribution to reduce human intervention
- AI based autoresponder of tickets of similar incidents

Associations / Membership

MSME
MICRO, SMALL & MEDIUM ENTERPRISES

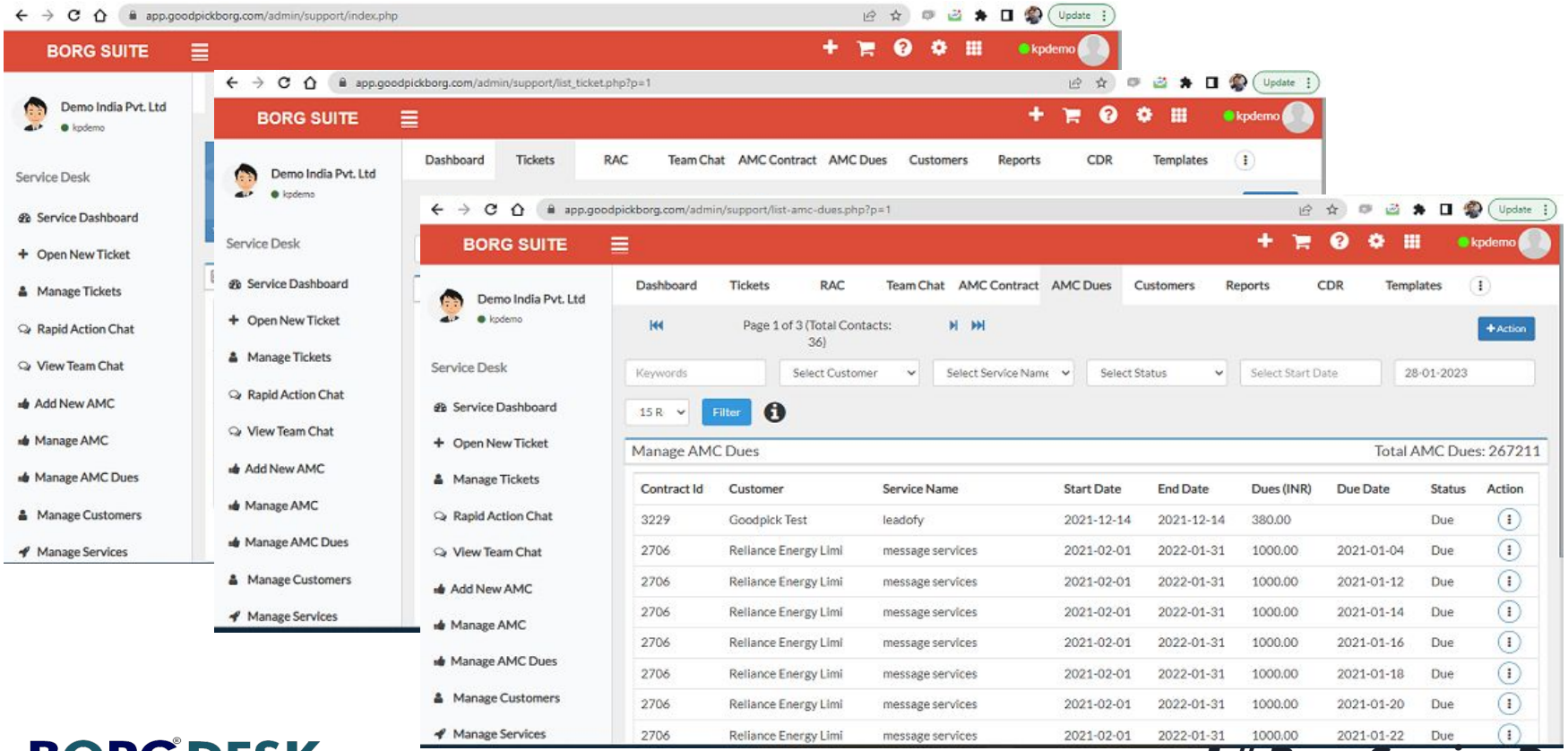
#startupindia

SHARDA LAUNCHPAD

CallerDesk

Product Overview
(Borg Desk ERP)

1 # Service Desk (Customer Support Desk)



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1 # Borg Service Desk

Borg Desk ERP Capabilities

Integrated Modules

- Task Delegation System
- Sales Automation
- Billing, Receivable, Payable
- Employee Management & Payroll System
- Stock, Orders System & Distributor Dashboard

BORG® DESK
Integrated Customer Support Desk

Customer Support Desk

- Automated Ticketing Solution With Customer Dashboard
- Multi-Channel Communication
- Live Chat from Dashboard
- CSAT, PNS, SLA
- Cloud Call Center
- AMC Contracts & Dues

Customer Management

- Add new customers
- Modify existing customers details
- Upload customers in bulk
- Download customers details in Excel csv
- Click-to-Call & IVR integration

Admin Dashboard System

- Admin refers as Master Admin of Service Desk
- Setup helpdesk
- Create Service / support team members accounts
- Create & Assign Departments
- Define SLA
- Open Incident
- Manage Reported Incidents
- Incident (Ticket) Escalation
- Incident (Ticket) Closer
- Open & Manage Service / Maintenance Contract
- Monitor & Analyze Analytical Reports

Agent Login Dashboard

- Service Team refers as Helpdesk team user accounts
- Open Incident
- Manage Reported Incidents
- Incidents Escalations
- Incident Closer
- Open & Manage Service / Maintenance Contract

Customer Login Dashboard

- Customer refers as Solution seeker
- Open Incident
- Respond Incidents
- Incident Closer
- Reopen Incidents
- View SLA

Incident (Ticket) Management

- Incident Management System
- Report Incident
- SLA Management
- Prioritize Incidents
- Incidents Conversation Records
- Incident Closure

Ticket Priorities

- Critical
- High
- Medium
- Low
- Very Low

- Priorities can be defined by financial impact of Incident occurred for customer. For example – Critical means heavy amount of financial loss is involved with this issue so this requires fast remedies to be applied by enterprise.

- If right priority is not set by customer, the same can be upgrade or downgrade by company service user based on financial impact on the business.

Annual Service Contract Management (AMC)

- Add new contract
- Manage unlimited number of service contracts
- Modify existing contracts
- Renew Service Contract
- Contract Expiry Alerts
- AMC Dues Management & Reminders

Rapid Action Chat

Rapid Action Chat Helps customer to connect / notify to service agents with Ticket number in case in critical priority incidents to expedite the solution

- Agent & Customer Chat Room
- Agent to Agent Chat
- Agent & other Teams Chat

BORG-Ticket Escalation

Ticket Escalation System:

Based on the Priority level, Ticket can be escalated so that unsolved issues can receive senior level attention in order to get solution in time.

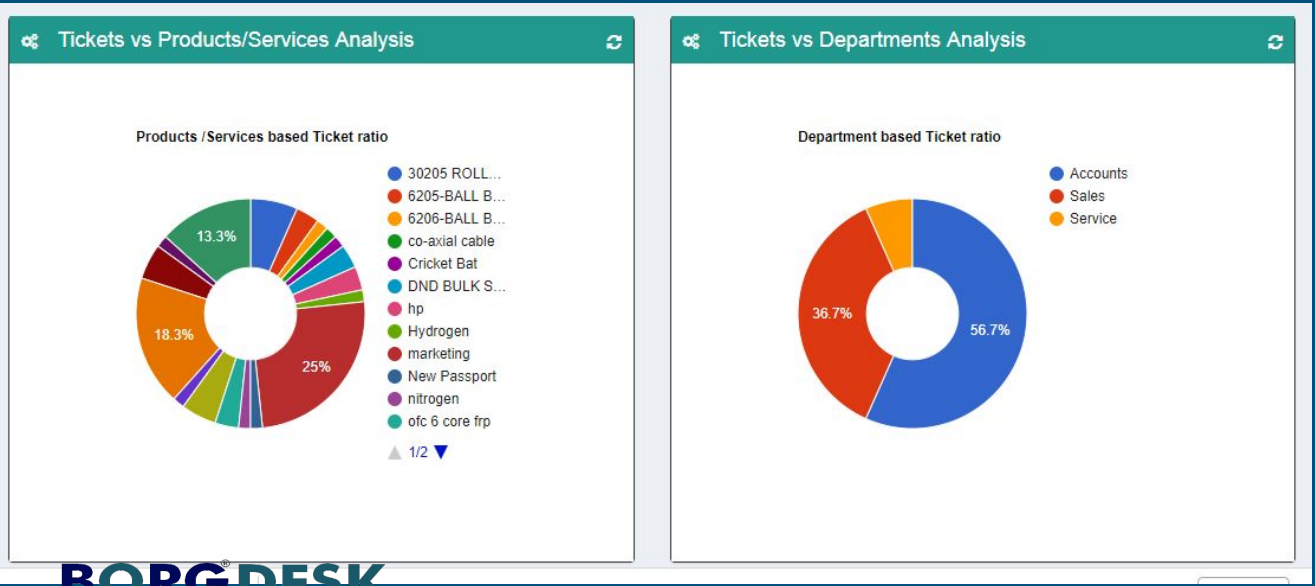
There are various level escalation-

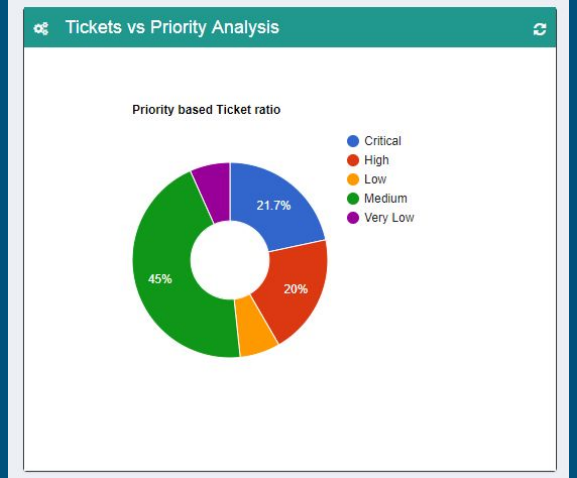
- Level-4 – Admin (L-4 Escalation)
- Level-3 (L-3 Escalation)
- Level-2 (L-2 Escalation)
- Level-1
- Service/Help Desk Coordinator

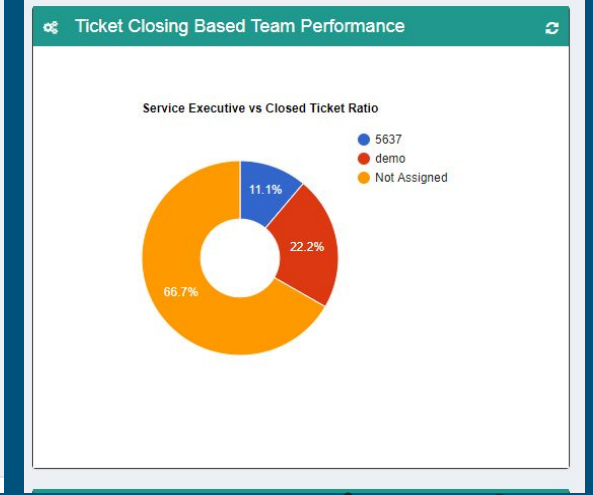
BORG-Service Desk Priority Table

Problem severity	Status	Impact
Critical Priority	Mission Critical	Serious Financial Impact
High Priority	Extremely urgent	Significant Financial Impact
Medium Priority	Urgent	Medium Financial Impact
Low Priority	Low Priority	Minimal Financial Impact
Very Low Priority	Very Low Priority	No Financial Impact

Analytical Reports







Integrated Email & SMS Alerts

Note:
SMS & Email service is a third party service & has to be integrated & priced separately as per

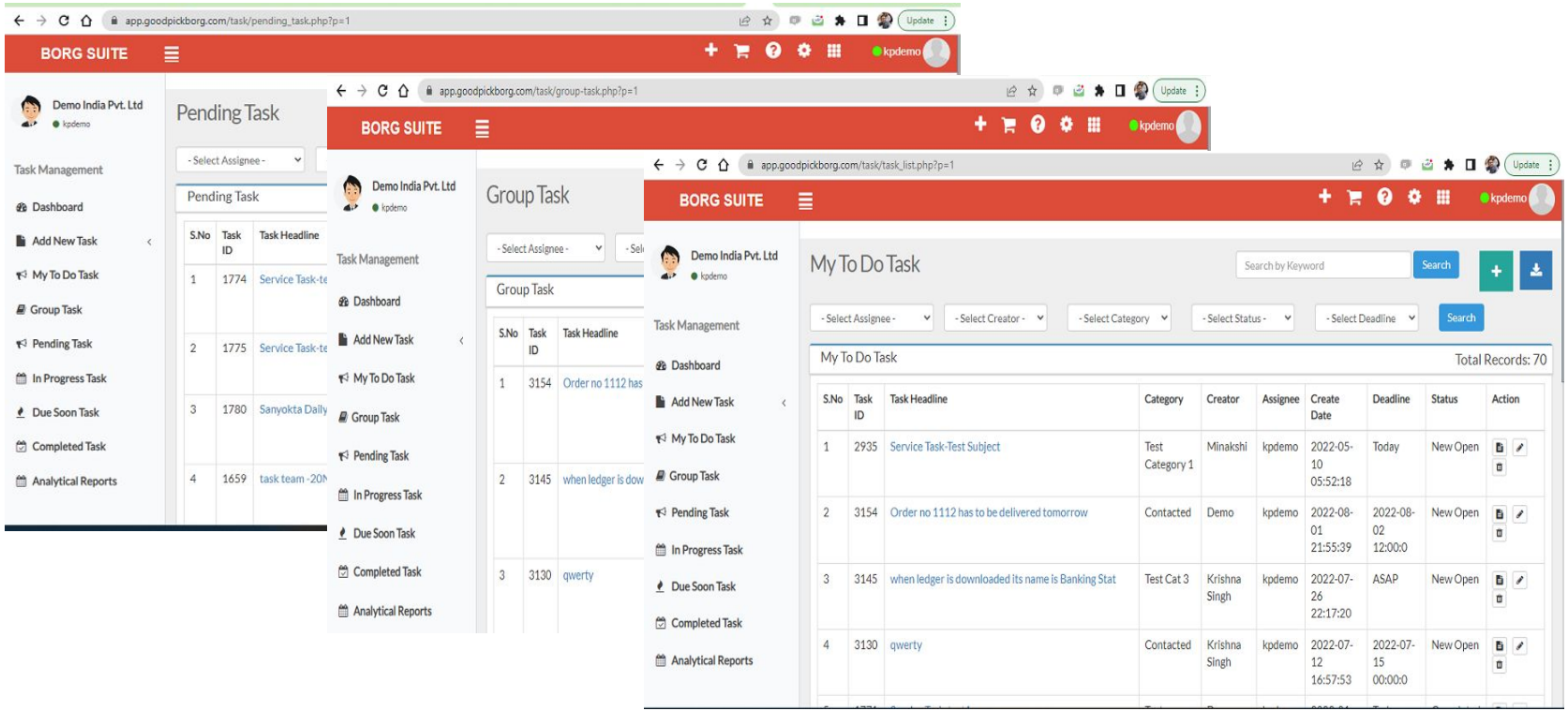
availability of package.

- Email alerts of full ticket conversation is set to both customers & company's registered email id for shake of records & notification.
- Once New ticket is opened, SMS alerts is sent to company's designated configured mobile number.
- Once ticket is closed by the company, Customer is well informed instantly about ticket closer by SMS.
- SMS & Email alert is sent both customer & company before expiry of contract to remind for renewal of the same.

Key Features

- Integrated Service Desk with other Modules
- Ticket Management system with priority
- Back-end Task Management & Delegation system
- Customer Login Dashboard
- Live Chat from Customer login Dashboard
- AMC Contract Management system
- AMC Dues Tracking system
- TAT (Turn Around Time) Report
- Analytical Reports
- Feedback Management (CSAT, NPS, Surveys, Analytics, etc.)

2 # Task Force (Collaboration)



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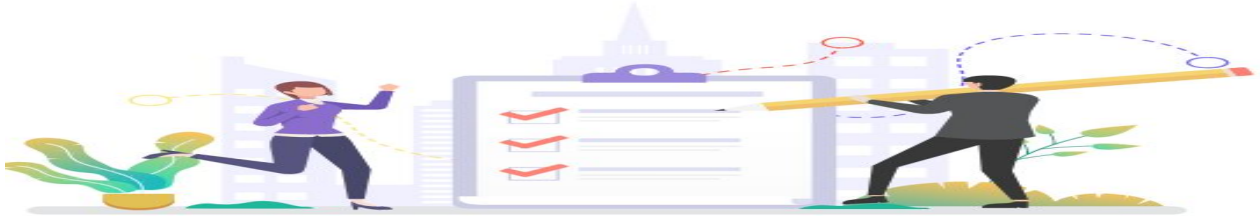
2 # Borg Task Force



Task Force Management

BorgDesk facilitates various ways for tracking employee performance & enhance Productivity like Sales Team Productivity, Support/service team Productivity, Backend teams productivities etc.

BorgDesk Service Desk integration with Task Force creates new opportunity for IT service industry. Task Force remove gaps & leakage between front end service agents & back-end service technician & other team members.

Task can be created & assigned to either individual or groups for its completion within defined deadline & entire history can be recorded.

BorgSuite Task Force (Collaboration)

- General Task
- Check List Task
- Group Task
- Task Distribution
- Task Category
- Pending tasks
- Completed tasks

- My to do task
- Task Reports
- Task Tracking
- Task History
- Task Logs

Borg Task Force Overview

- Task Creation by any team members for other individual or groups
- Every task has its own description & deadline
- Task has to be updated by each stakeholder with current status
- Latest updates & history can be seen by Service Agents to reply to customer for current status
- Task can not be deleted by any user
- Task can be modified by task creator only

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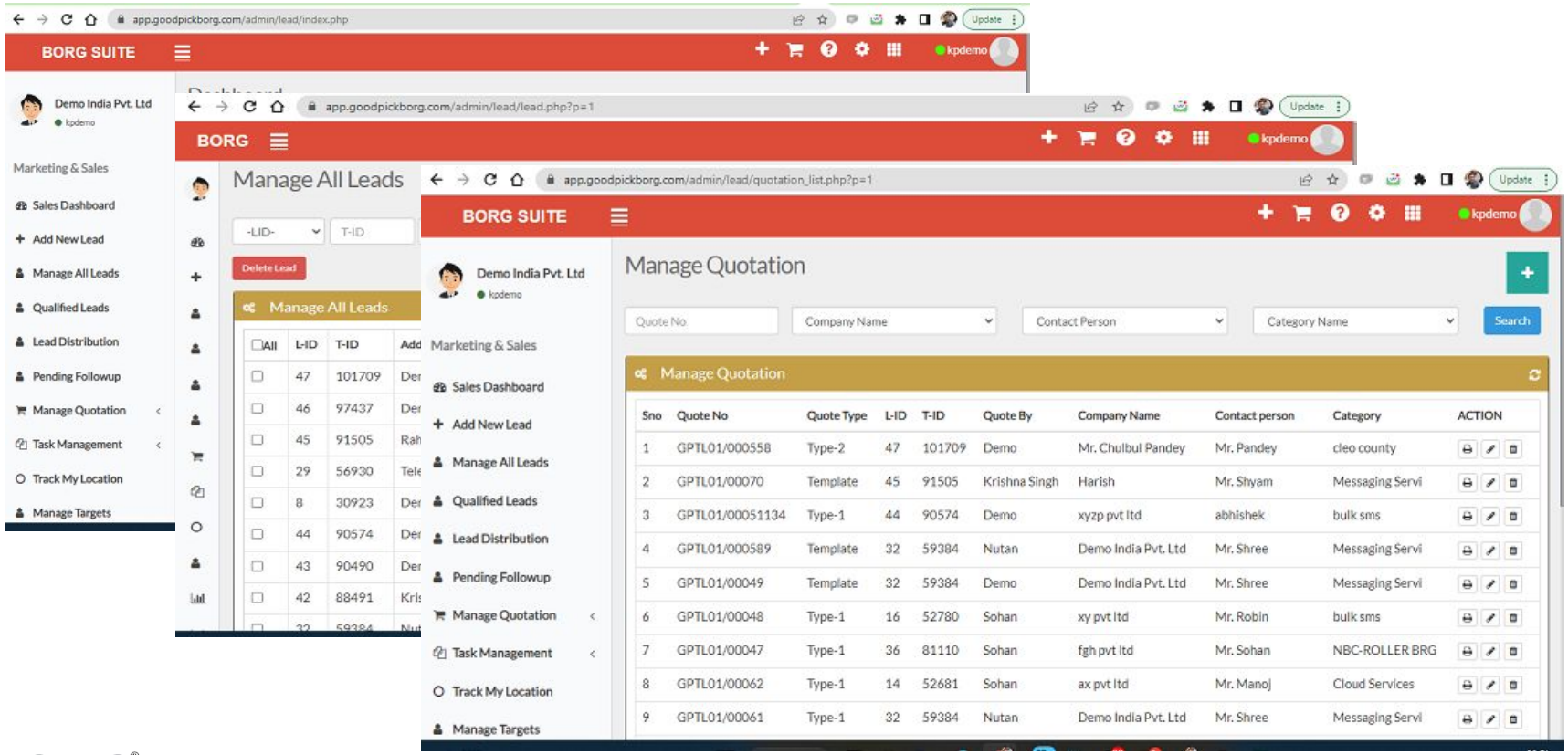
Task Categories / Project Name

Borg facilitates customer to configure its own category / project name of tasks as per their business requirements

Tasks Reports

- Completed Task
- Due Soon Task
- All Pending Tasks
- In-Progress Tasks
- Tasks Summary
- Task Delay by one Day
- Task Delay by Two Days
- Task Delay by any date Range
- Today’s updated Tasks
- Etc..

3 # Sales CRM (Sales Automation)



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3 # Borg Sales CRM

BorgSuite Sales CRM

- Sales Process Automation
- 4 Level hierarchy Management
- Lead Management
- Qualified Leads
- Multi-Channel Lead Capturing
- Save, Print & Mail Quote
- Cloud Telephony Integration

- Lead Distribution
- Pending Follow Up
- Follow up Tracking Logs
- Follow up SMS & Email Reminders
- Team Target Management
- Team Performance Tracking
- SMS & Email Integration

BORG- Lead Reporting Channels

BORG allows enterprises to report lead through 5 possible channels-

- Manually
- Missed Call
- IVR
- Website
- Social Sites

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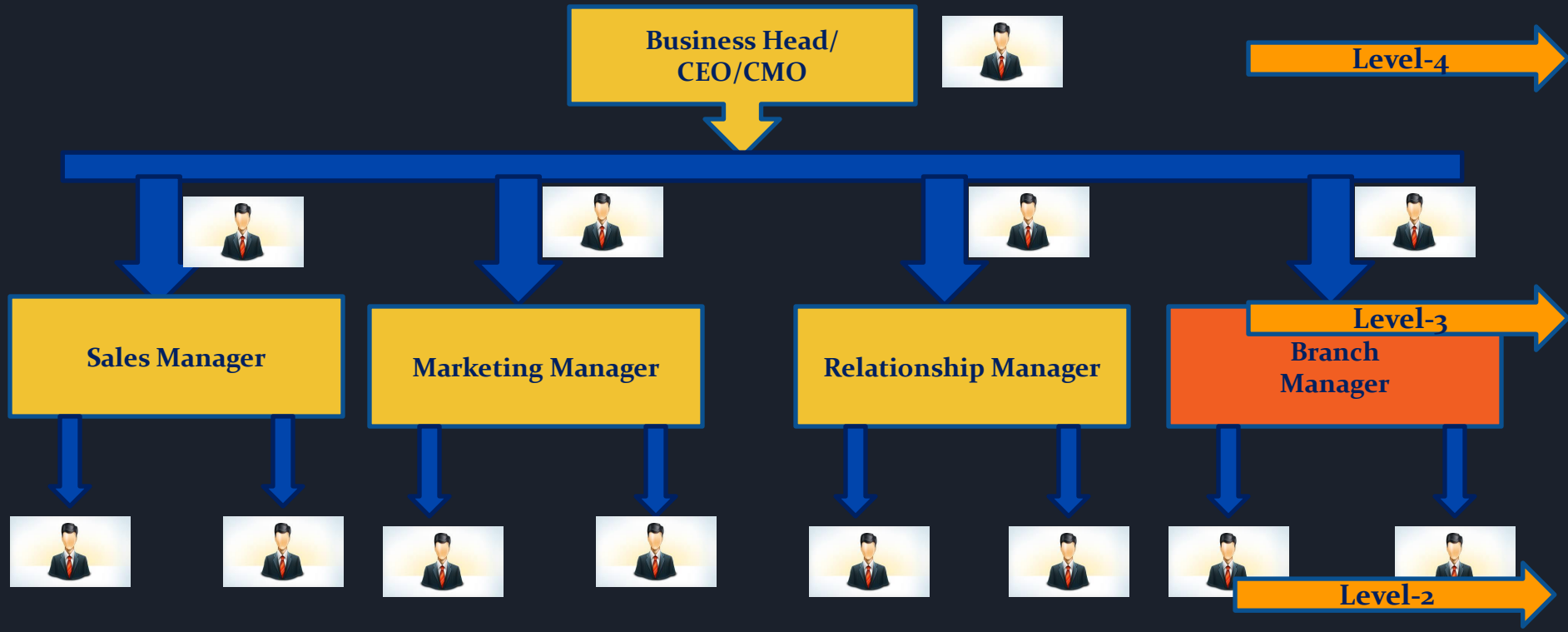
BORG- Sales & Marketing Module

- BORG tracks each & every Lead with text history available online & accessible from any where at any time.
- *4 Level Enterprise Management.*
- Auto greet SMS & Email to enquirer
- BORG alerts by SMS alerts with details of follow up scheduled on the date.
- Manage prospects & Leads with detailed information & status of follow up.
- Generates more than 15+ reports for analysis
- Generates 3 type of quotation based on requirements.
- Provides Product & Service management option.

BORG - 4 Level Lead Tracking & Management



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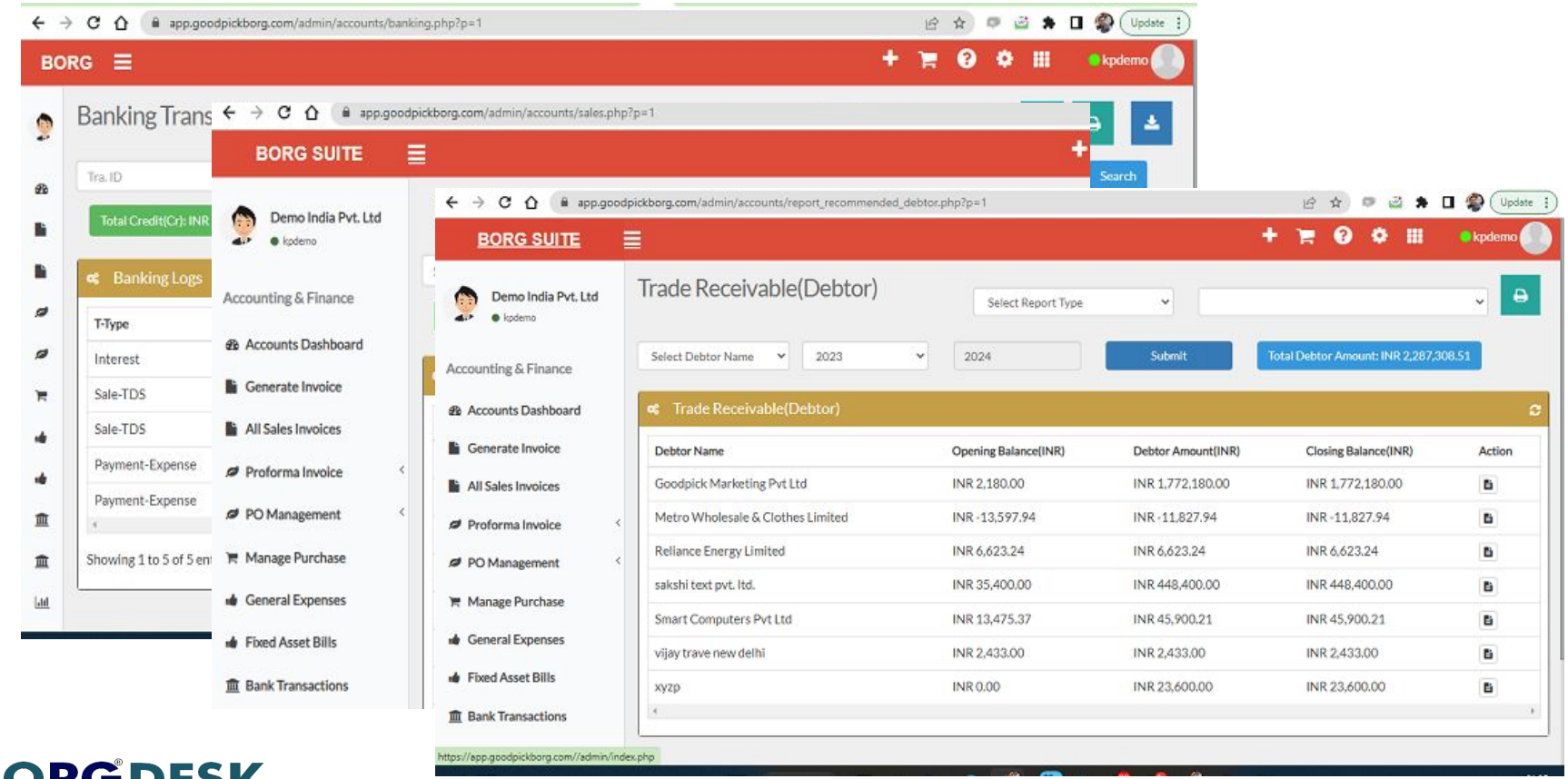
3 # Borg Sales CRM

BORG vs Excel/Diary

Today's Enterprise Sales Needs	BORG	EXCEL
Lead Management	YES	YES
Greet SMS & Email to enquirer	YES	NO
Each Lead Tracking Logs records	YES	NO
Conversion Rate Calculation automatically with all aspects	YES	NO
4 Level Tacking monitoring any where at any time	YES	NO
Generate standard quotation & store to download/mail at any time any where	YES	NO
Auto generation of various analytical Reports	YES	NO
Auto bar chart & pai chart presentation of conversion rates	YES	NO
Auto reminder SMS for follow ups	YES	NO
Transparency within the team due to unique sales system	YES	NO

3 # Accounts Book (Book Keeping & Receivable)



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4 # Borg Accounts Book

BorgSuite Accounts Book

- GST Sales Invoice
- Proforma Invoice
- PO Management
- Purchase Management
- Expense Management
- Bank Transactions
- Track Receivable (Debtors)

- Track Payable (Creditors)
- Payment Overdue Reminders
- Auto Payment Confirmation
- GST Tracking Reports
- Other Accounting Reports
- Credit / Debit Register
- 45+ Accounts Reports

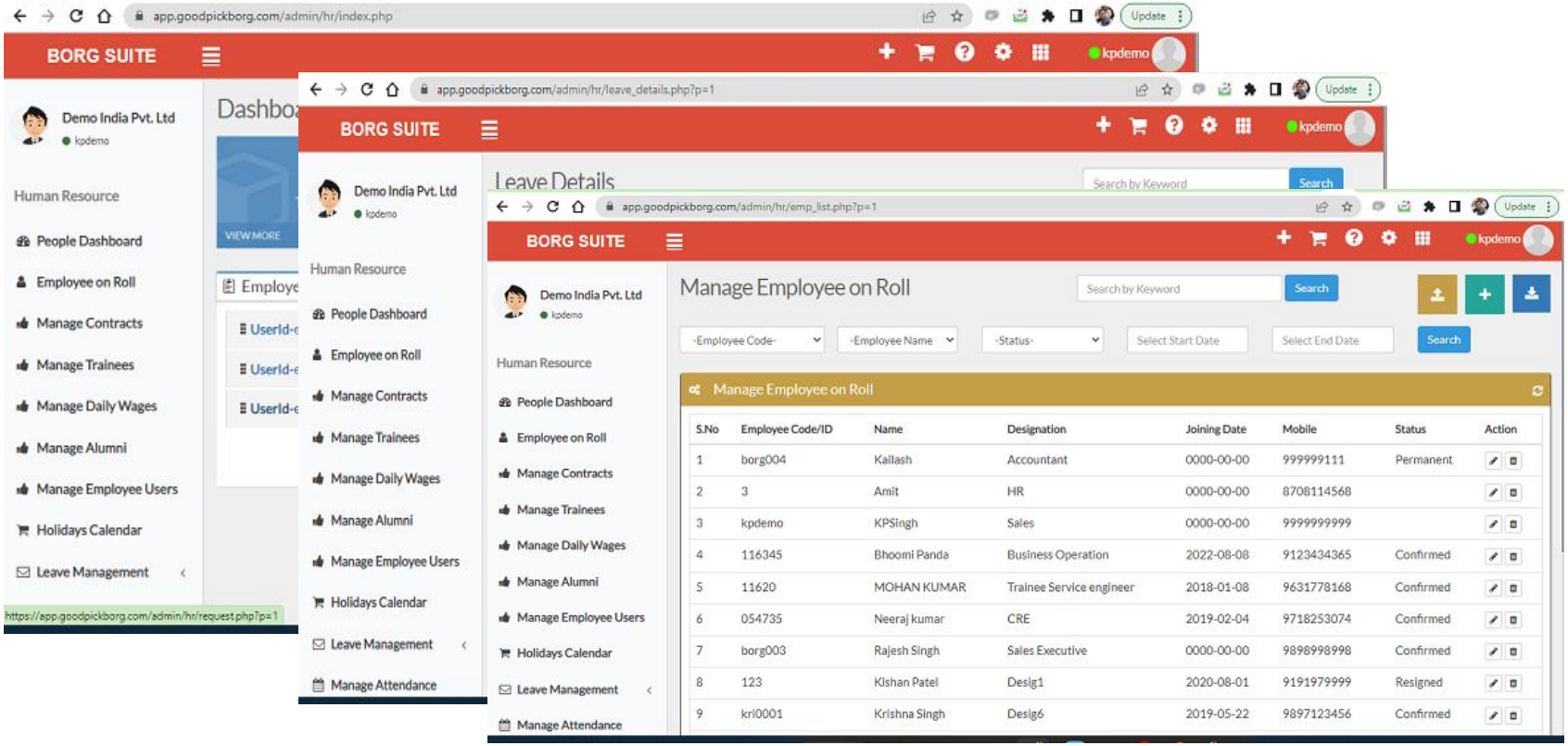
BORG -Accounting & Finance Module

- BORG Account Manager covers all account functions including Profit/Loss Statement & Balance sheet automatically along with account notes.
- BORG is full of all billing functions including Service Tax, Taxation, Discounts & Sale Tax.
- Invoice & Pro-Forma Invoice can be generated in a single click & Store for downloading anywhere at any time.
- BORG generates more than 45+ reports for analysis
- BORG provides Account Audit option for Chartered Accountants to cross verify all transaction payments with respective account heads.
- BORG provides Compete Inventory management option.

BORG Accounts vs Tally

Today's Enterprise Accounts Needs	BORG	Tally
Compatible for all type of Enterprise Business	YES	YES
Fear of Loosing Data in the Hard Disk	NO	YES
Online – Manage any where any time	YES	NO
Invoice in generated & store for future use	YES	NO
Auto SMS & Alerts to customers	YES	NO
Daily Auto SMS & Email alerts to Owners	YES	NO
No special Training required	NO	YES
Can be managed by anybody	YES	NO
Customer Management	YES	NO
Accounts reports	YES	NO
Business Performance, Profit Loss, Balance sheet available any time any where	YES	NO

5 # HR & Payroll Management



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5 # Borg HR & Payroll

BorgSuite HR & Payroll

- Employee Profiling
- Alumni Records
- Holiday calendar
- Leave Management
- Attendance Management
- Asset Management
- Reimbursement

- Payroll System
- Salary Slip
- Employee Dashboard
- Business Reports
- Email & SMS Integration

People Management

Employee Management with all personal, Professional & employment details in 3 categories-

- Employee on Roll
- Employee on Contract
- Trainee
- Alumni

Employee Leave Type

Borg HR & Payroll system facilitates its customer with various type of leaves-

- Casual Leave (CL)
- Privileges Leave (PL) / Elective Leave (EL)
- Sick Leave (SL)
- Leave without Pay (LWP)
- MAL - Maternity Leave
- PAL - Paternity Leave

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Attendance System

Attendance System is fully integrated with Payroll System. It’s can be marked by following ways-

- Manually
- Excel / CSV bulk upload
- Mobile App with GPS Tracker
- Online any other Attendance system like Face Scanner
- API Integration with any 3rd Party Software

HR & Payroll Reports

- View Salary Slip
- Reimbursement
- Attendance
- Salary Statistics
- Leave Statistics

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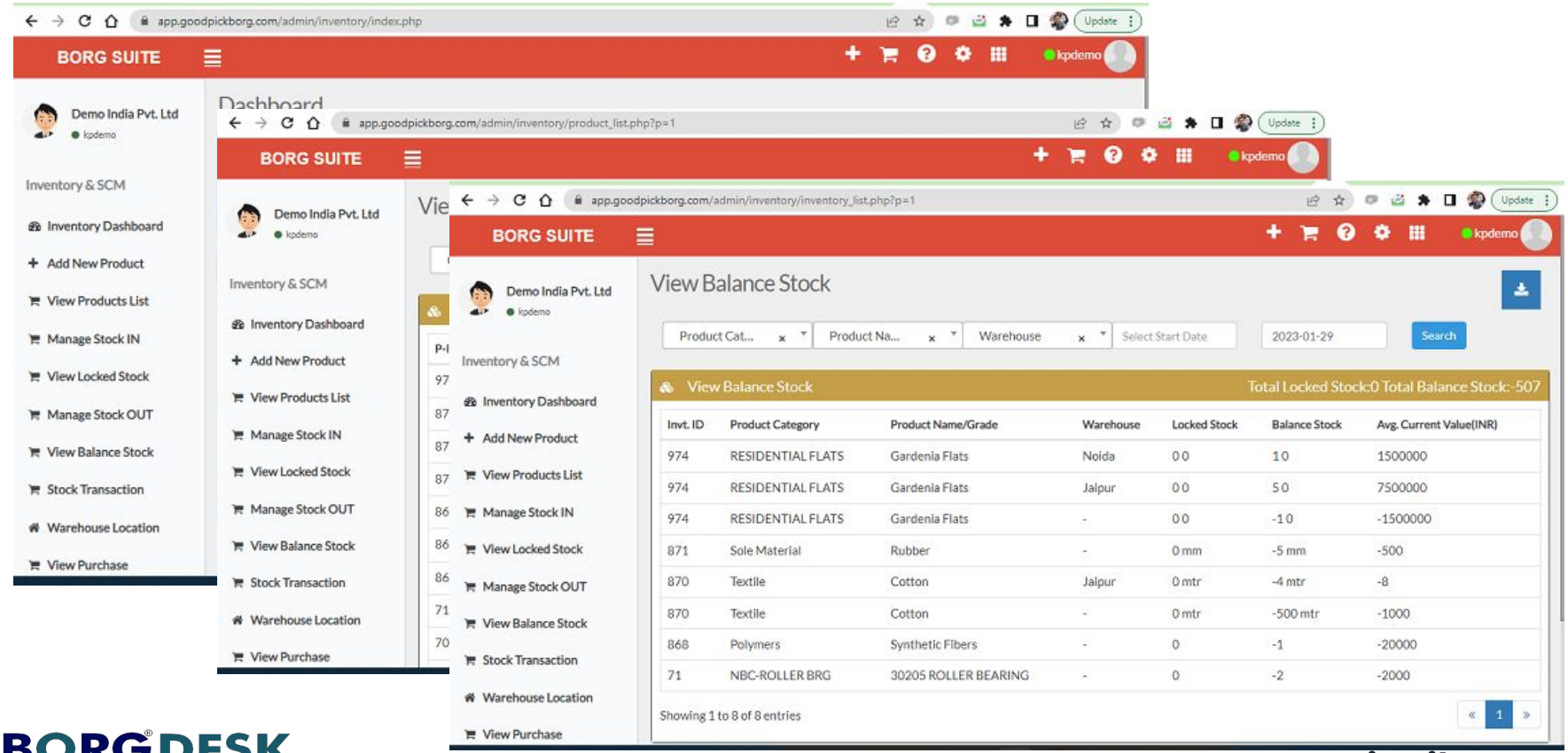
Payroll Settings

- Provident Fund (PF)
- ESI
- TDS (80C, 80D, 80EE, 87A)
- Leave
- Attendance

6 # Inventory & Distributors



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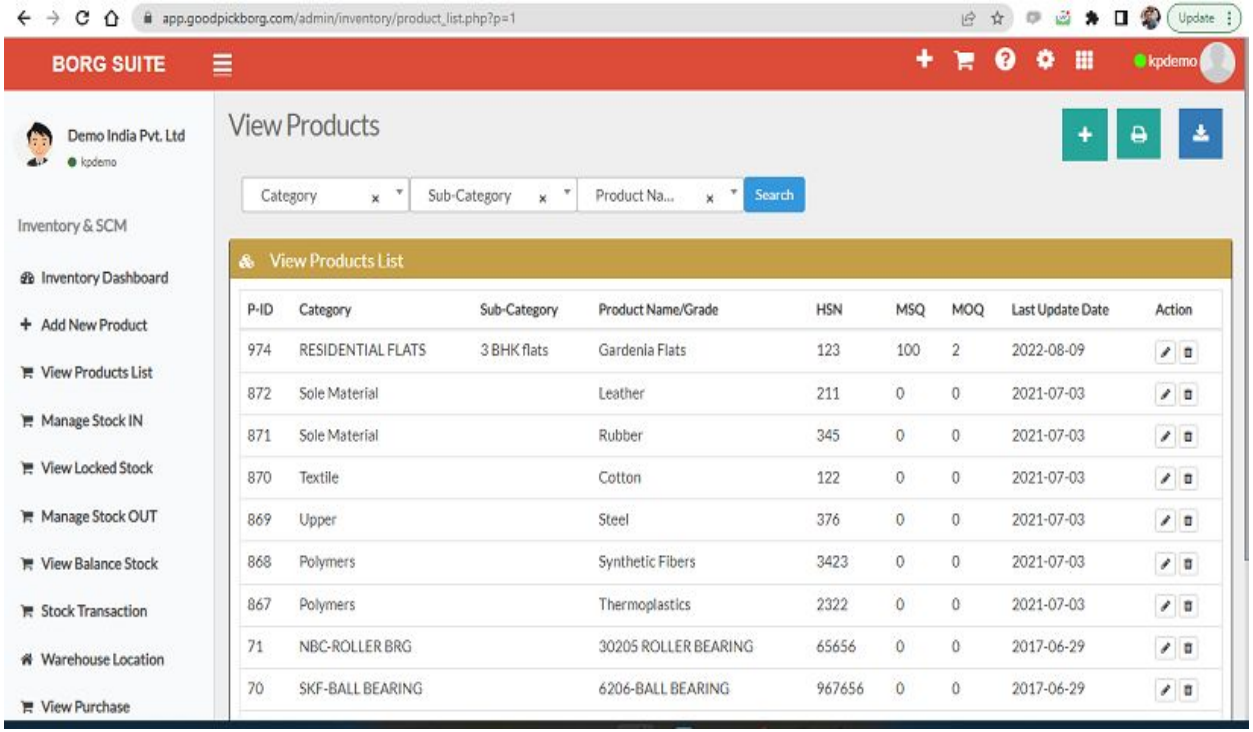
BorgSuite Stock & Distributors

- Products Management
- Opening Stock
- Stock Management
- Balance Stock
- Integrated with Sale & Purchase
- Multi Warehouse Location
- MSQ & MOQ

- Track Out Stock
- Order Management
- Order Tracking
- Distributor CRM

Product & Warehouse Management



Product Management includes Category, Sub-category & then products along with their HSN Code for billing, MSQ (Minimum Shortage Qty), MOQ (Minimum Order Qty) etc.

Product Management list can be downloaded & printed in need by Admin.

Inventory (Stock) Management

Inventory Management:

Inventory is paramount important for physical products Channel Sales (Wholesaler / Distributors) to end users.

Inventory Key Points help business owners for tracking & Automation-

- Product Management
- Opening Balance
- Stock-In & Stock Out
- MoQ
- Lock Stock
- Stock Transactions

Order Management

- Generate New Orders
- Order Approval
- Order Custom Status
- Lock Order Quantity
- Order Tracking
- Order Status auto notifications

Inventory & Order Reports

- Top ten sold products
- Order Tracking
- Stock Tracking
- Sortage Stock Alerts
- Warehouse wise balance stock
- Lock stock report

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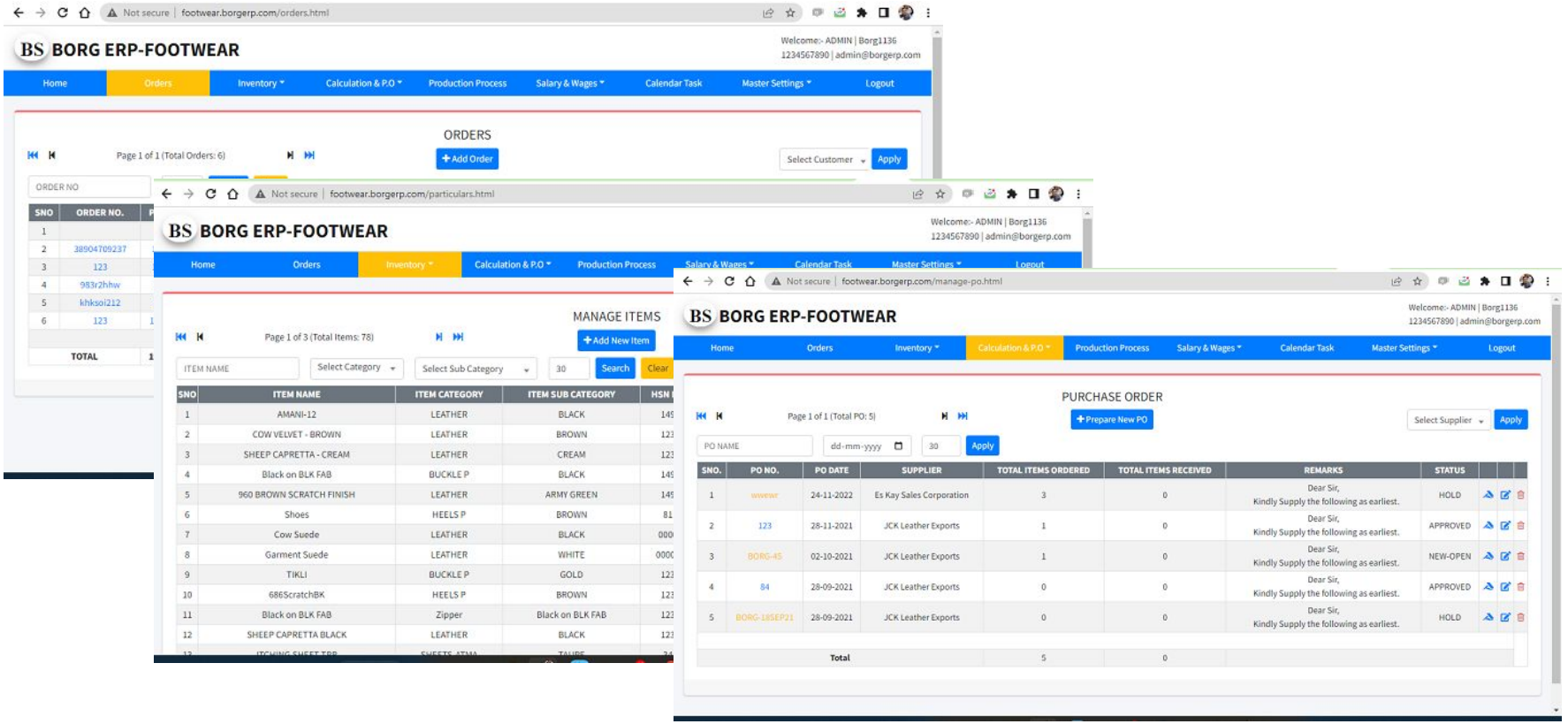
7 # Supply Chain / Manufacturing



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Borg Suite Supply Chain / Manufacturing

- Article / Item Listing
- Sample Order
- Order Management
- Label Generation
- Bill of Materials
- Production Process
- Invoices
- Wages Management
- Task Management
- Statistics
- Permission
- IP Security

- Customer Management
- Supplier Management
- User Management
- Staff Management
- Merchant Management
- Assortment Management
- Season Management
- Category Management
- Order Tracking
- Tooling Tracking
- CFM Tracking
- Packaging & Shipping

Article Management

- Article detailing & specifications like Heal, Lining, Last, Color, Sole, Finishing, Stiching, Upper, Cat. etc.
- Pricing, Selling Price, Margin
- Copy, Edit, Delete, View etc.

Sample Order

- Sample order generation & Management, Receiving Date, Insertion Date, Reminders, Special Notes.
- Print, Edit, Delete, View etc.

Order Management

- Order Placing & Management
- Article addition & Deletion
- Print, Edit, Delete, View etc.
- Order Tracking, Tooling Tracking & CFM Tracking

Label Generation

- Window for Addition & removal of Article.
- Pricing, Selling Price, Margin
- Copy, Edit, Delete, View etc.

Permission & Security

- Access level privilege management, Module Access permission, action buttons for allowing & disallowing with BORG
- Delete, Edit, Delete, View etc.
- IP Level access management

Image Gallery

- Image Categories from Master
- Collection of All Images..
- Multiple Images upload as a time
- Image / Photo Zoom Out for clarity

Assortment

- Standard & Custom Assortment
- Delete, Edit, Delete all Assortments
- Assortment Name - Change / Modified
- Customer specific Assortments
- Common Assortments for all

Shiping, Tooling, CFM

- Shipping status updation & tracking
- Tooling status & tracking
- CFM Tracking
- All tracking stages can be customised as per specific needs of company

Bill of Materials (BOM)

- Material Management
- Stock Receiving
- Stock to Production
- Stock Transactions
- Balance Stock
- Stock Return

Production process

- Order Mapping with Stock
- PO Request Approval
- PO Generation
- PO Management
- Job Work Assignment
- Job Work Receiving

Wages Management

- Staff Profiling
- Update Contractual Wages
- View Contractual Wages
- Updates Daily Wages
- View Contractual Wages
- Leave Management
- Attendance Management

Invoicing

- Generate Proforma
- Manage Proforma
- Generate Tax Invoice
- Manage Tax Invoice

Task Management

- Insert New Task
- Update Task
- Task Tracking
- My to do task
- Group Task
- Due Task
- Completed Task

Packaging & Shipping

- Generate Proforma
- Manage Proforma
- Generate Tax Invoice
- Manage Tax Invoice

Borg Desk Implementation

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Why Enterprises Need Integrated Software Suite ?

- Enterprise do not have strategic data availability as needed.
- Enterprises do not able to focus on all business verticals results sometimes customer loss, sometimes Financial Loss & Sometimes Potential staff loss.
- Mismanagement in maintaining data on various different excel sheets & strategic dependability on team.
- Loss of professional attitude & style of working.
- Lack of business automation, Cost effective & Stream Lined Process .

Cont.....

Why Enterprises Need Integarted Software Suite ?

- Enterprises do not have transparent business tracking Systems to identify loop holes in time.
- Not having clear picture of source of leads so that they can focus on the same to generate more business.
- Do not have customer connects tool.
- Do not have comparative analysis of sales turnover & company's liabilities, results they are failed to identify loop holes or weaker section of the business.
- Do not have real time analytics, Team performance & customer connects.

Business Development Needs CCT

Enterprise Development is not possible without CCT.

- C- Communication
- C- Connectivity
- T- Technology

BorgDesk drives all critical business operations effortlessly to stay at the forefront of evolving technologies.

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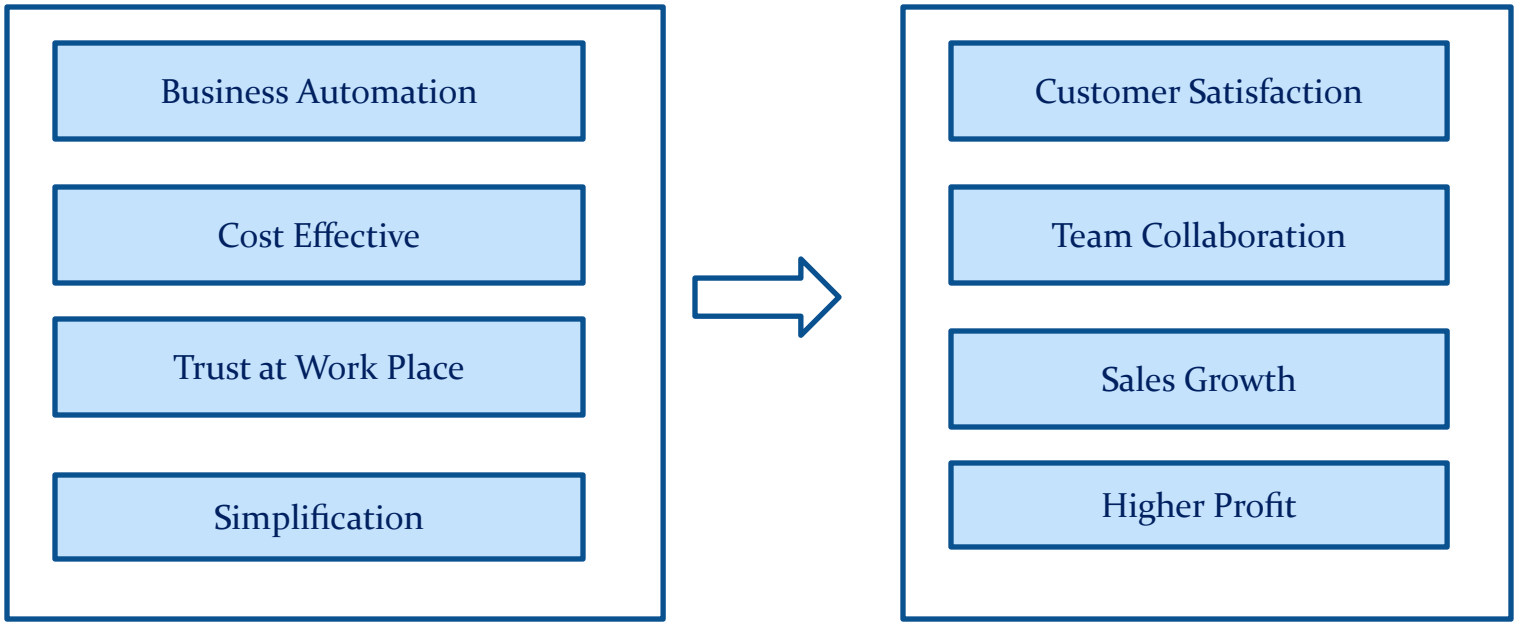
BorgDesk Implemented Enterprise



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BorgDesk as a Right Tool for Business Growth

- BORG as a Gateway to connect with Global Platform
- BORG does automate various Business Processes
- BORG as a Trust Enhancer among team & Customers
- BORG as a Process Simplifier for enterprise
- BORG as Growth Multiplier by bringing reform
- BORG connects enterprise with evolving technologies
- BORG assists all the way to get set goal of a company

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BorgDesk as a Business Automation Tool

Every business leader dreams to automate most of the processes & systems in order to minimize operational cost & maximize customer satisfaction.

BORG Reported Benefits -

- ✔ Increase in customer satisfaction
- ✔ Informative customer relations
- ✔ Minimizes operational cost
- ✔ Error free & fast processing.
- ✔ Simplify Business Operation

BORG automates business in the following ways-

- Auto Communication with Customer
- Auto Management of Business Processes

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BorgDesk as a Cost Reducer

BORG reduces operational cost manifold & makes daily business activities error free, fast & simple.

- BORG reduces no. of employees
- BORG reduces paper work
- BORG reduces chances of error
- BORG reduces task completion time

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BorgDesk as a Process Simplifier

- BORG brings favorable business productivity & outcome of the Business. Processes become simple when all individual in the company follows same platform with same protocol & that's called streamlined workflow.
- Being user friendly interface, All people on the BORG speak same language in the same way (Single access interface for all teams)

"Simplification increases productivity & reduces time"

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BorgDesk as a Trust Enhancer

BORG enhances trust within the team & Managers-

- ✔ Due to transparency in the work & activity logs availability develop trust in the team & managers.
- ✔ Each log is shared in the vertical up to 4 levels.
- ✔ Companies decision maker or owner can monitor daily task anywhere at any time.
- ✔

“Growth is directly proportional to Credibility”

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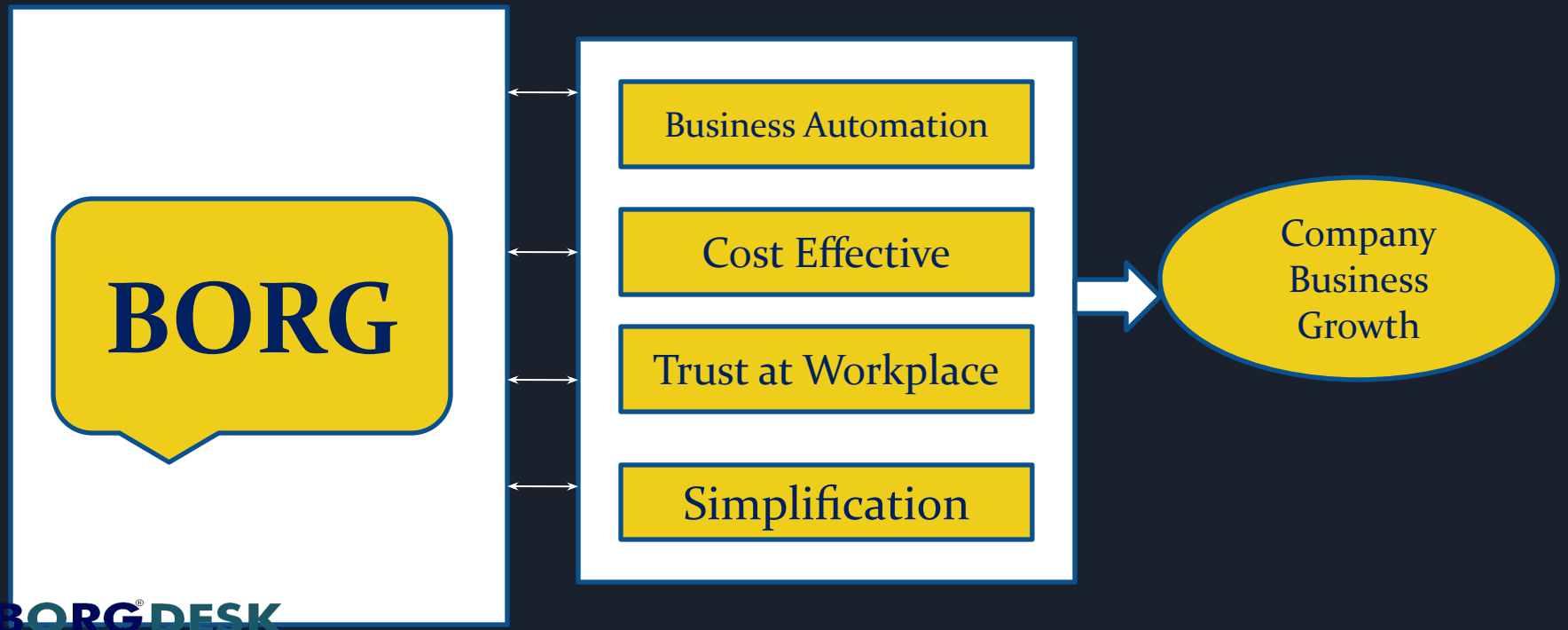
BorgDesk as a Growth Multiplier

Growth is a combination of various factors-



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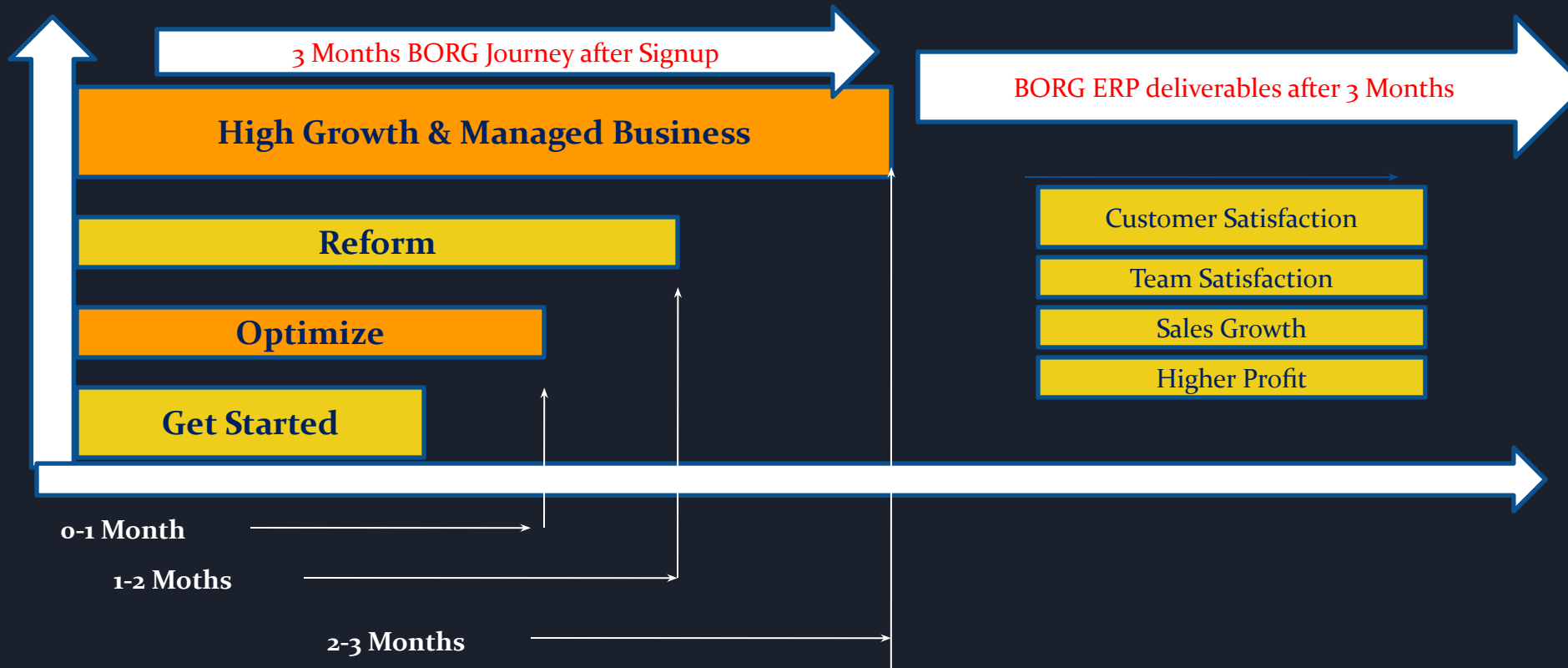
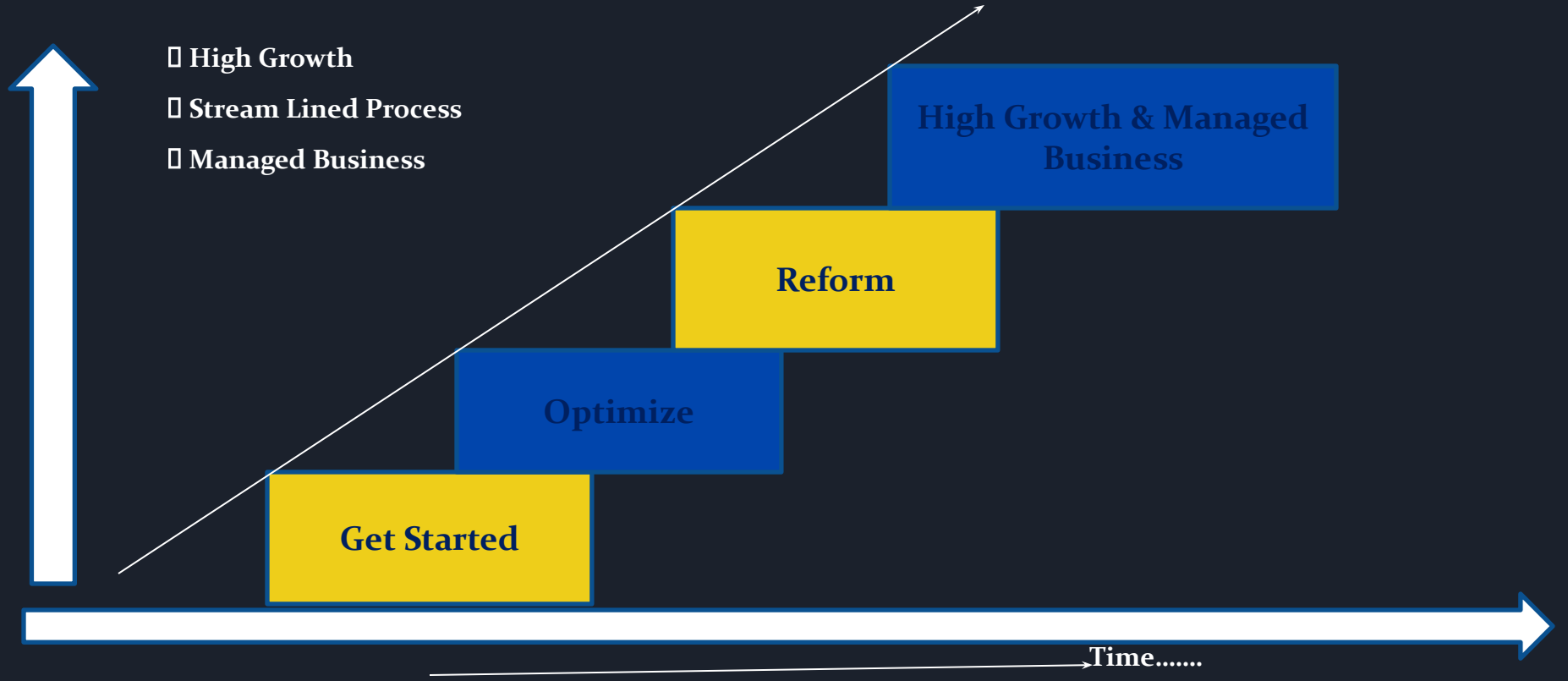
BORG Implemented Enterprise's experience



BORG Journey with Enterprise



Caller Desk Integration with Service Desk

BorgDesk is working on integration of Caller Desk with Service Desk to enable call center end-to-end solution by dialing & receiving calls directly to Borg Service Desk.

Additional Cost : Free
Availability : Very Soon but No Commitment of timeline (Depends on feasibility of Integration technically)

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On Demand / Specific Integrations

Note:
Any integration needs deep understanding of both end software application, Feasibility & Available APIs

Any Additional features / modification if possible will be charged additionally & not included with user licenses fee

Borg Product team always works day & night to provide improved version of products to customer & evaluate / study if any integration is suggested / demanded by customer.

Borg team is not committed to do all integrations suggested by customer.

Cost : Yes very reasonable to cover of team salary cost only based on number of days engagement

Trusted by Customers Like

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Thank you !!

www.borgerp.com

Email - sales@borgerp.com
Support - Ticket Support System
EMail - servicedesk@borgerp.com