



Customer Relationship Management System

CRM Pipeline Customers Reporting Configuration Administrator

Pipeline Search... Filters Group By Favorites

New \$69,600

- Interest in your Graphic Design Project (Software) \$24,000.00, Agrolait
- Script to Import external data (Services) \$5,600.00, Camptocamp
- Plan to buy 60 keyboards (Product) \$40,000.00

Qualified \$61,000

- Trainee's training plan in your Organization (Information, Training) \$35,000.00, Delta PC
- Pricing information of Services (Services, Information) \$1,000.00
- Plan to buy RedHat servers (Product) \$25,000.00, Agrolait

Proposition \$24,500

- Would appreciate more information about your products (Software) \$11,000.00, Agrolait
- Need to customize the solution (Information) \$4,500.00
- "Resource Planning" project development (Consulting) \$9,000.00, Delta PC

Negotiation \$77,000

- Interest in your customizable Pcs (Product) \$15,000.00, Camptocamp
- Need 20 Days of Consultancy (Consulting) \$60,000.00
- Want to subscribe to your online solution (Services) \$2,000.00, Think Big

Won \$25,600

- Interest in your products (Software) \$2,000.00, Agrolait
- Interest in your Partnership (Other) \$19,800.00, China Export
- Need new design for my website (Design) \$3,800.00, Delta PC

Add new Column



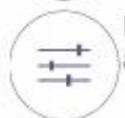
Why CRM?

Get accurate forecasts

Use actionable data to make better decisions.



Get the insights you need to make smarter decisions.



Design custom dashboards to get a picture of your business at a glance.



Dig deeper with real-time reports and flow charts that anyone can create and share.

Sales Dashboard Sales Invoicing Reports Configuration 21

Pipeline Analysis Search

MEASURES + - x

Filters Group By Favorites

Total		February 2016		Undefined		
	Expected Revenue	Quantity	Expected Revenue	Quantity	Expected Revenue	Quantity
Total	43,195.00	9	81,080.00	14	124,275.00	23
New	6,400.00	2	0.00	8	6,400.00	10
Proposition	14,775.00	2	59,280.00	4	74,055.00	6
Qualified	20,020.00	4			20,020.00	4
Won		1	21,800.00	2	23,800.00	3

- Active
- Assignment Date
- Campaign
- City
- Close Date
- Company
- Conversion Date
- Country
- Creation Date

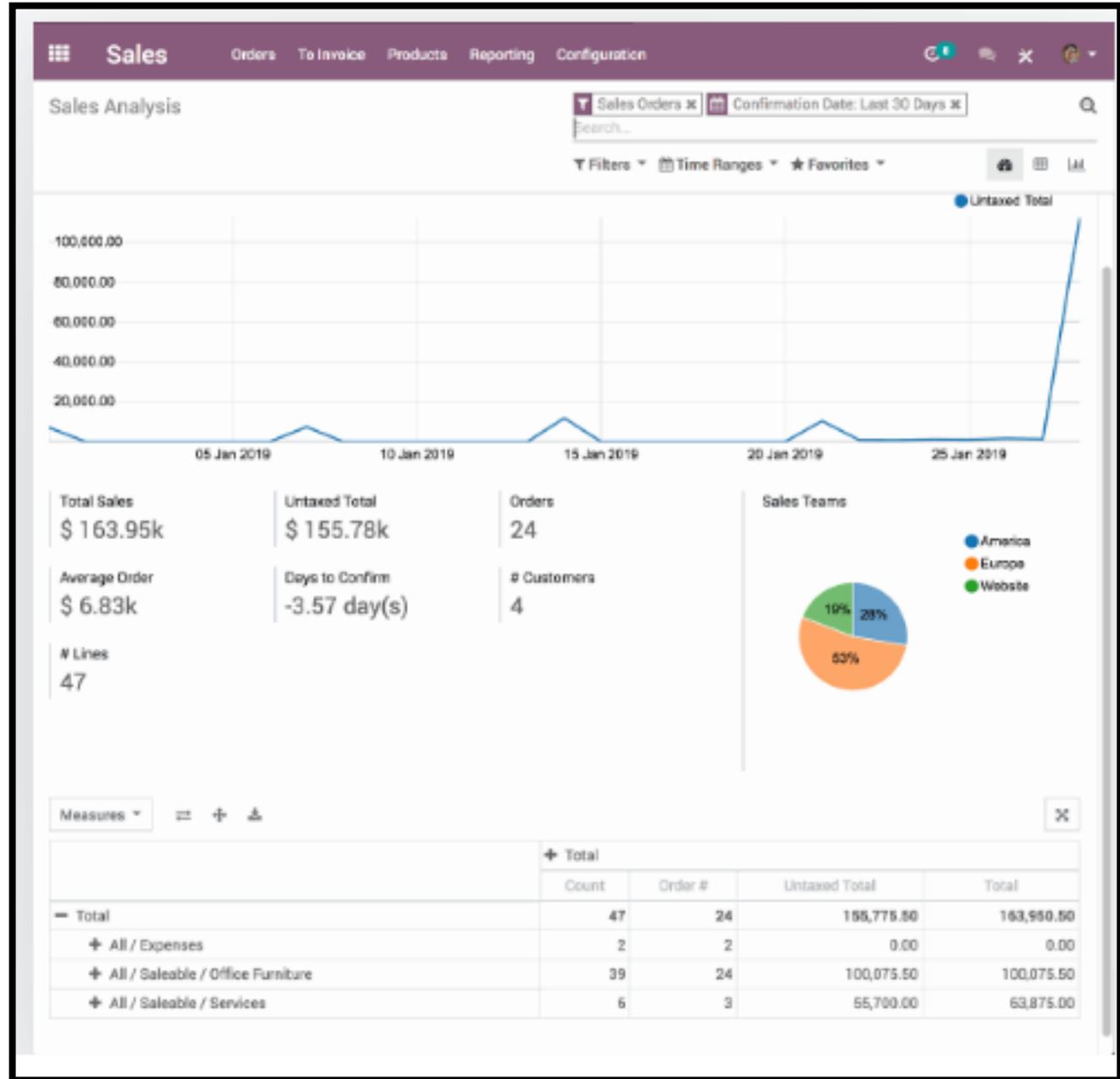
Get more done in less time

Great Tools = Happy People

Schedule activities based on your sales scripts: calls, meetings, mailing, and quotations. Get all information you need, directly on the opportunity: website pages viewed, mail received, etc.



Real-time overview





CRM-lead

Specifications and price of your phones

Steve Martinez

● Product

★ ★ ☆ ⌚

Design Software Info

Jose Garcia

● Product

★ ★ ☆ ⌚

- Detail Information
- Convert to opportunity
- Assign to salesperson
- Arranging Meeting appointment

Convert to opportunity

Conversion Action

Convert to opportunity

Merge with existing opportunities

Assign this opportunity to

Salesperson

Sales Team

America

Customers

Link to an existing customer

Create a new customer

Do not link to a customer

CREATE OPPORTUNITY CANCEL

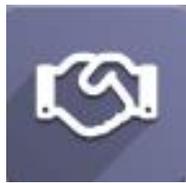
CONVERT TO OPPORTUNITY MARK AS LOST

Convert To Task 0 Page views

Specifications and price of your phones

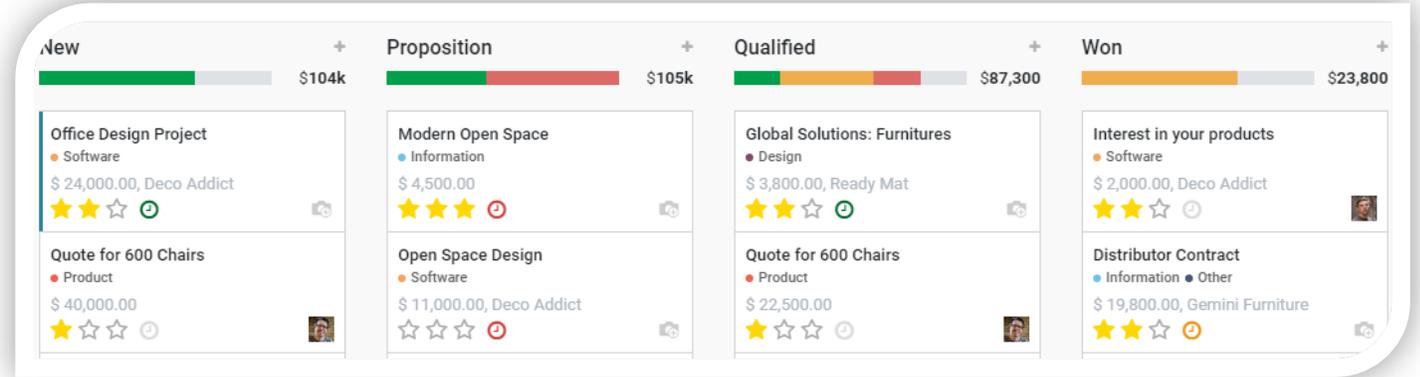
Company Name		Contact Name	Steve Martinez
Address	Edinburgh United Kingdom	Email	
Website		Job Position	Reseller
		Phone	
		Mobile	
Salesperson		Priority	★ ★ ☆
Sales Team	America	Score	0.00
		Tags	Product

- Prioritize the lead
- Giving score
- Tag



CRM-Sale pipeline

- Staging
- Detail Log and Activity
- Meeting Arrangement
- Link to Quotation
- Expected Closing and Revenue
- Follow-up data



Pipeline / Global Solutions: Furnitures

EDIT CREATE

NEW QUOTATION MARK WON MARK LOST

NEW PROPOSITION QUALIFIED WON

Send message Log note Schedule activity 0 Following 2

Planned activities

- Today: "Global Solutions: Furnitures" for Mitchell Admin
- Tomorrow: "Convert to quote" for Mitchell Admin (803)-873-6126

Today

OdooBot - 14 hours ago

- Sales Team: Europe →
- Salesperson: Mitchell Admin →

OdooBot - 14 hours ago

Stage changed

- Customer: Ready Mat
- Customer Name: Global Solutions
- Contact Name: Robin Smith
- Email: ready.mat28@example.com
- Phone: (803)-873-6126

Global Solutions: Furnitures

\$ 3,800.00 at 90 %

Customer: Ready Mat Expected Closing: 07/16/2019

Email: ready.mat28@example.com

Phone: (803)-873-6126

Salesperson: Sales Team Priority: 3 stars

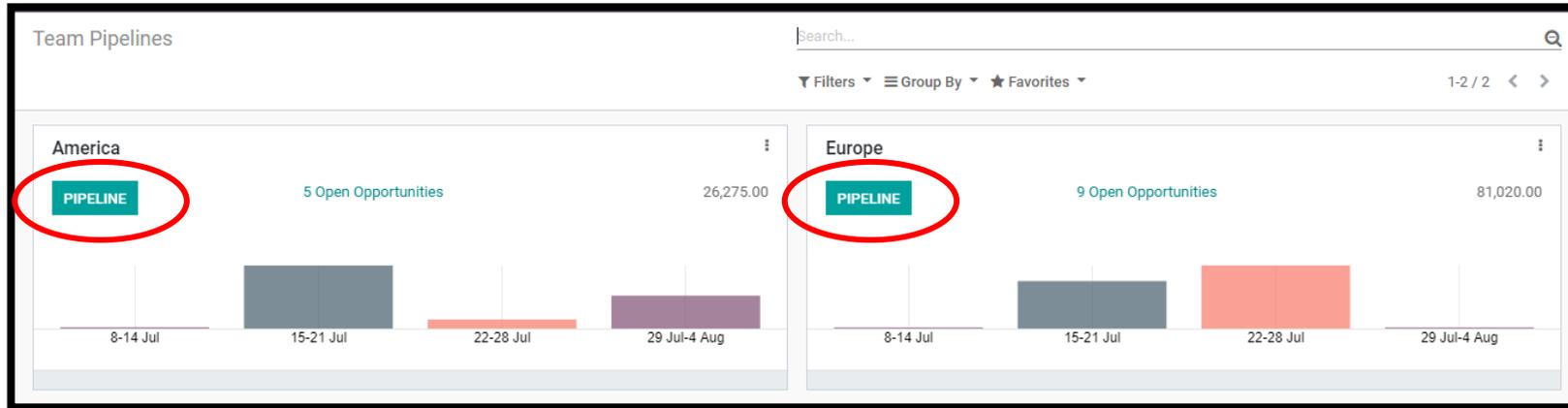
Score: 0.00

Tags: Design

Internal Notes Followup Assigned Partner



CRM-Sale Team Management



- Can manage several sales teams, departments or channels
- Create pipeline of desire sales team
- Set tam lead
- Set Invoicing Target

Europe

4 Opportunities Active

Quotations Pipeline Leads

Team Leader sales

Domain Match records with the following rule: Country = "France"

Assigned Leads Count 1 / 3

Minimum score 0

4 RECORD(S)

Assignment Dashboard

YourCompany, Mitchell Admin Assigned Leads 1

Toni Buchanan Assigned Leads 0

Camille Watkins Assigned Leads 0

Invoicing Target	250,000
Graph	
Content	Sales
Scale	Last Month
Group by	Week

Pipeline

CREATE IMPORT

Sales Channel Europe

Filters Group By Favorites

New Won

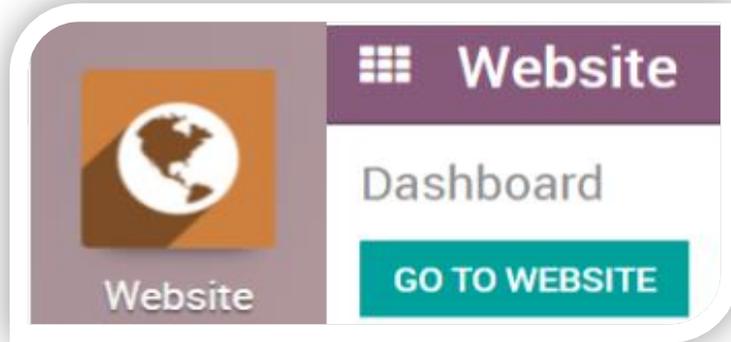
348,000 0 0 32,000

Canadian Lead \$ 48,000.00, Trudeau Inc.

Interest in your products Software \$ 2,000.00, Agrolait



Website Contact to lead



- Contact Form to Lead
- Customize Contact Form Easily

Contact us

Contact us about anything related to our company or services.
We'll do our best to get back to you as soon as possible.

YourCompany
1725 Slough Ave.
Scranton PA 18540
United States
+1 555 123 8069
info@yourcompany.example.com
[Google Maps](#)

Your Name *

Phone Number

Email *

Your Company *

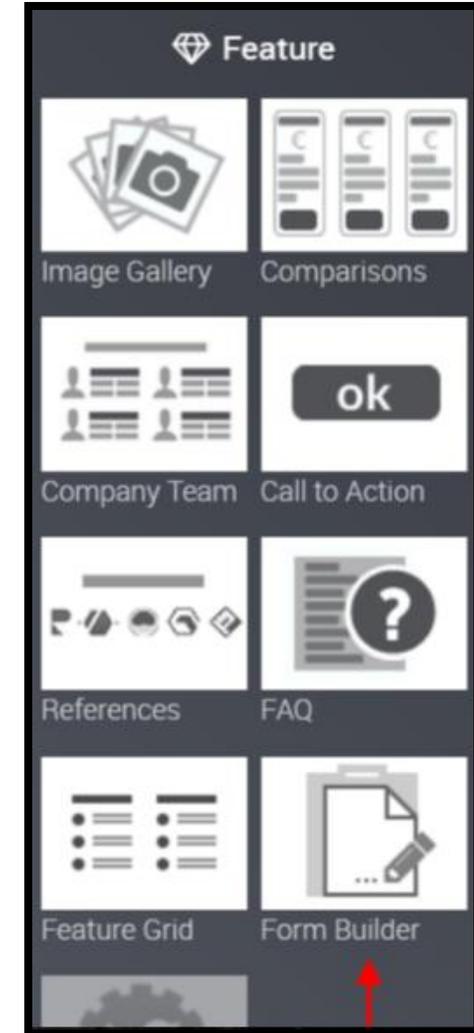
Subject *

Your Question *



Note

If the same visitor uses the contact form twice, the second information will be added to the first lead/opportunity in the chatter.

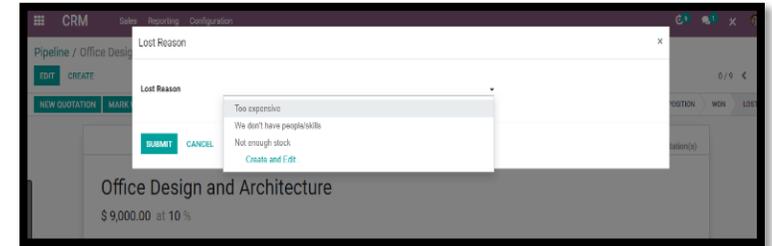




Manage lost opportunity



- Lead To Lost and Won
- Easily Filter Make Faster
- Restore



Pipeline

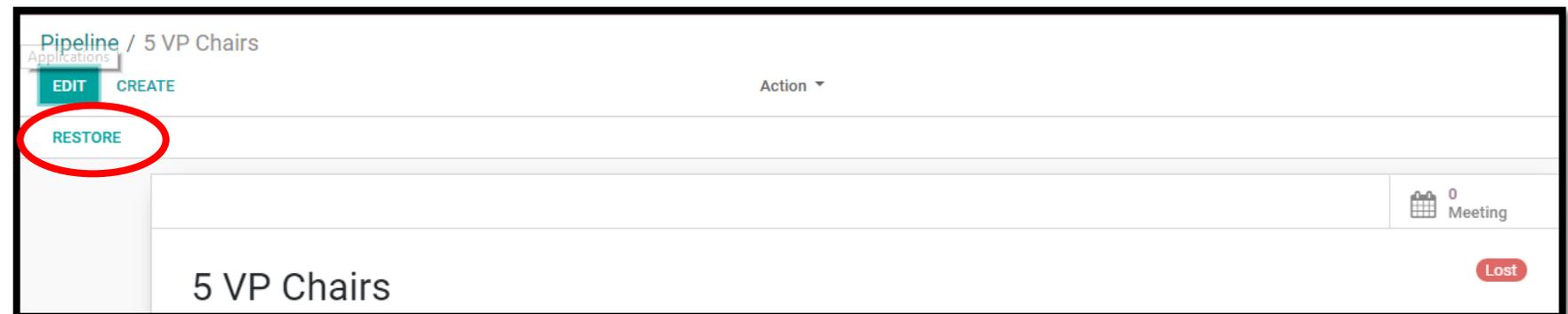
CREATE IMPORT

Lost x Search...

Filters Group By Favorites 1-3 / 3

Created on	Opportunity	Customer	Country	Next Activity Date	Stage	Expected Revenue	Probability	Sales Team	Salesperson
07/03/2019 09:57:06	5 VP Chairs	Azure Interior	United States		Proposition	5,600.00	0.00	Europe	Mitchell Admin
07/11/2019 11:04:30	HumanResource Management System	Deco Addict	United States		New	0.00	0.00	Europe	Mitchell Admin
07/10/2019 09:57:06	Furnish a 60m² office	Deco Addict	Belgium		New	7,500.00	0.00	America	Marc Demo
						13,100.00	0.00		

My Pipeline
Unassigned
Open Opportunities
Unread Messages
Overdue Opportunities
Creation Date
Expected Closing
Closed Date
Won
Lost
Activities Todo





Planning Activity

	Late	Today	Future
Lead/Opportunity	2	2	10
Product Template	0	2	0
Applicant	3	0	0
Task	1	1	0

- What is Next
- Reminder and Alert

Proposition + Won

\$2,000

Interest in your products

• Software

\$ 2,000.00, Agrolait

★ ★ ☆ ⌚

Overdue (1)

Call
⌚ Yesterday

Today (1)

Email
⌚ Today

Planned (1)

Meeting
⌚ Due in 7 days

[+ Schedule an activity](#)