Customer Relation Management - CRM

WR Ltd – ERP Cloud Solution
User Training – CRM

AGENDA

1. CRM FOOTPRINT
2. HOW CAN CRM HELP YOUR BUSINESS?
3. CREATE YOUR FIRST CUSTOMER
4. MANAGE ACTIVITIES/ LEADS STAGES
5. DASHBOARD AND REPORTING

1

CRM Footprint

CRM FOOTPRINT

Complete, Integrated and Extensible CRM App for Modern Customer Experience.

Customer Relation Management - CRM			
Customer Acquisition	**Customer Retention**	**Customer Support**	**Improvement**
▪ Sales Team/ Channels ▪ Sales Cycle ▪ Call Center pull sales (inbound) ▪ Call Center push sales (outbound) ▪ Lead work-flow management ▪ Campaign Management ▪ News Letter	▪ Segmentation tool ▪ Customer life cycle management ▪ 360 customer view ▪ Customer behavior analysis and tracking	▪ Claim management (HelpDesk) ▪ Customer Service Support ▪ Survey/ Rating ▪ Quality Assurance ▪ Gamification tool ▪ Advanced Analytics (Customer Satisfaction index)	▪ KPIs ▪ Knowledge Base ▪ Sales Strategies ▪ Seasonal Promotions ▪ Loyalty program ▪ Personalization offering ▪ Data driven agent interaction

2

How can CRM Help Your Business?

HOW CAN CRM HELP YOUR BUSINESS?

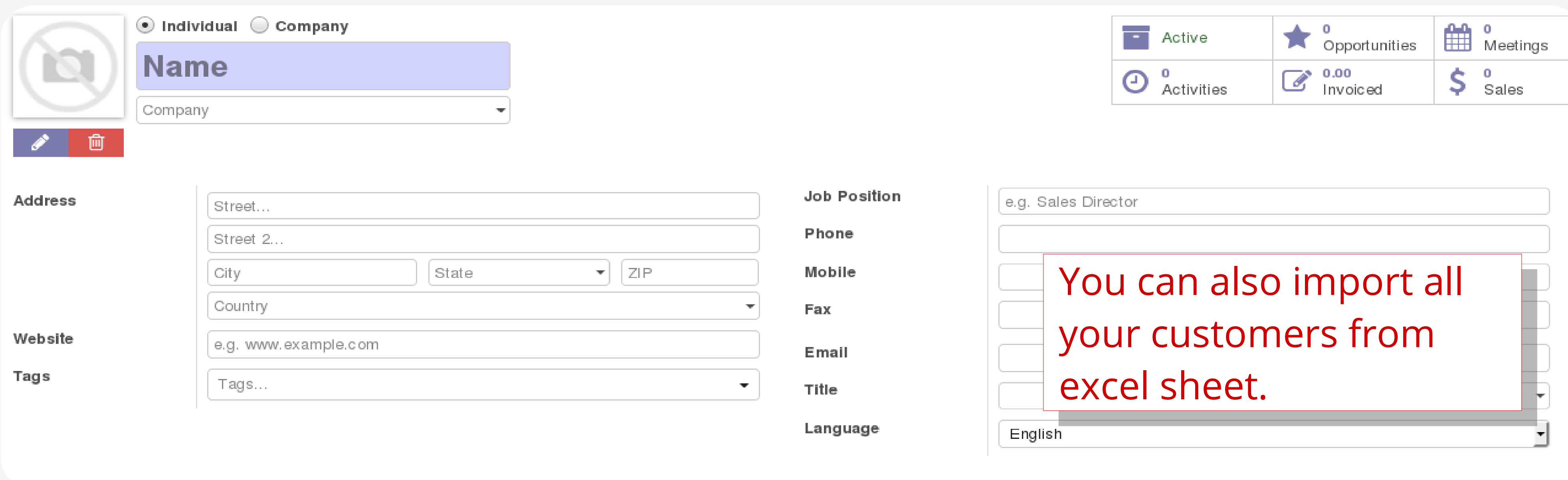
Processes	Features
Team Management	✓ Manage sales team ✓ Manager service support team ✓ Manage sales channels ✓ Commission management
Customer Management	✓ Manage all customer information i.e name, phone, email, birthday ..etc ✓ Full history i.e purchase history, complaint & service request ✓ Multiple address support shipping & invoicing address, home or ✓ business address
Lead Management	✓ Lead scoring and qualification ✓ next action/ activity i.e Call, schedule a meeting, book an appointment send and email ..etc ✓ Activity schedule calendar integration and notifications ✓ Fully customizable stages and activities
Reporting tool	✓ Manage all your work from single dashboard ✓ Leads and opportunities drill-down analytics ✓ Out of the box reports and search attributes

3

Create Your First Customer

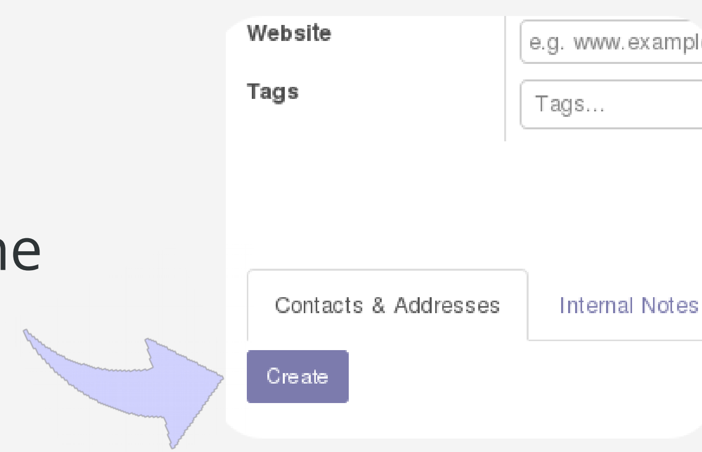
CREATE CUSTOMER

→ Go to Apps drawer → Sales → Top menu → Sales → Customers → Create



Add an address:

→ Contacts & Addresses → Create → Select the type of address, fill in details →

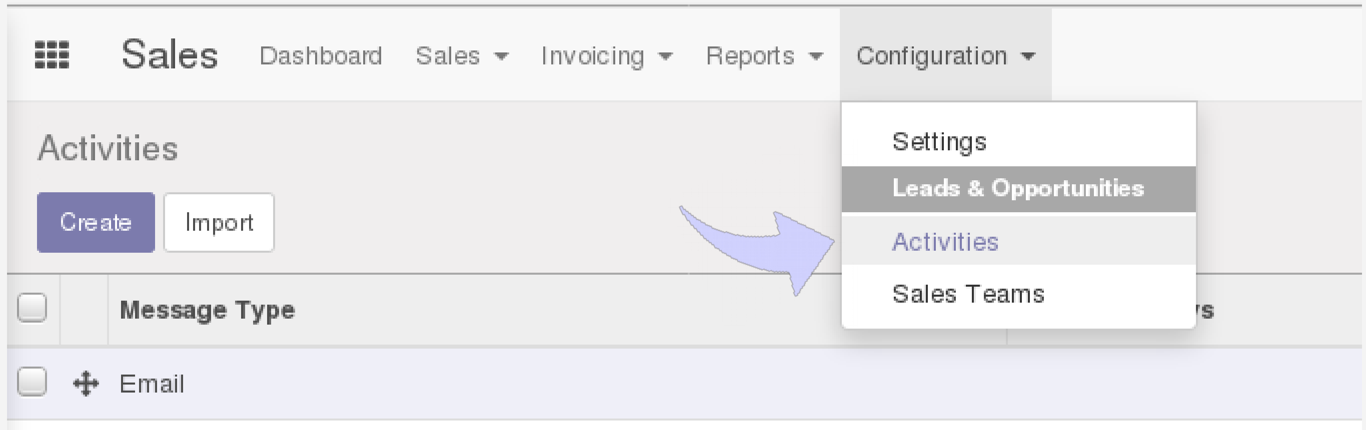


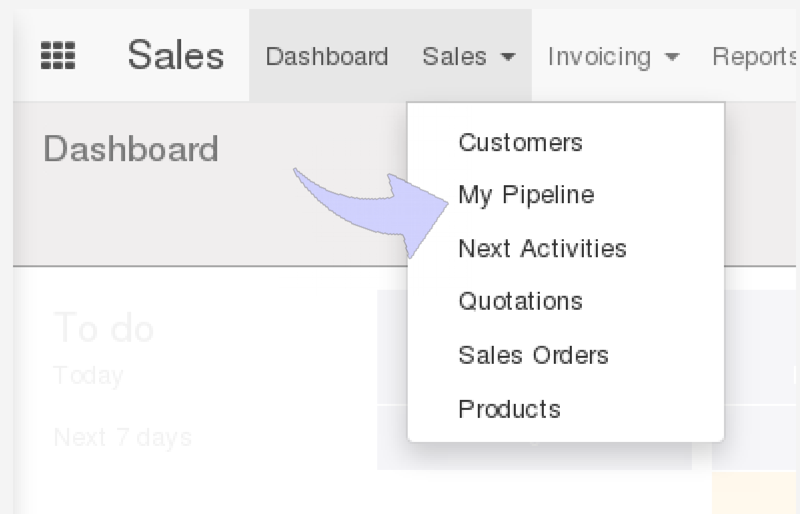
4

Manage Leads & Activities

CONFIGURE ACTIVITIES & LEADS STAGES

Configure Activities:
→ Go to Apps drawer → Sales → Configuration → Activities → Create





Modify your pipeline statges:
→ Go to Apps drawer → Sales → Menu → Sales → My Pipeline (You may update, create, delete stages)

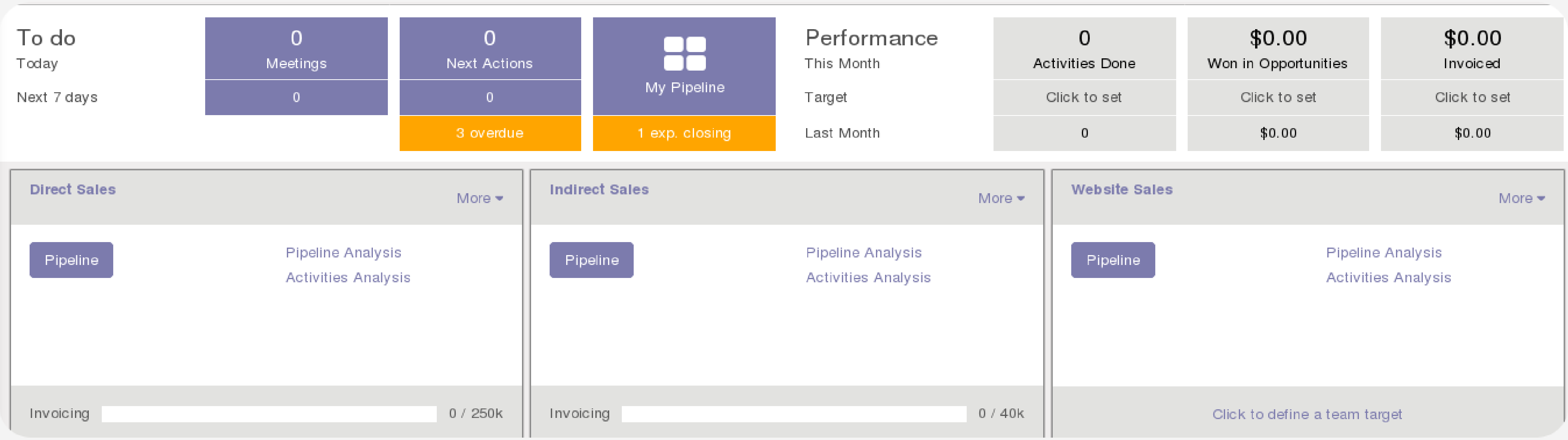
Now your CRM is ready to add new opportunities and assign them to your sales team

5

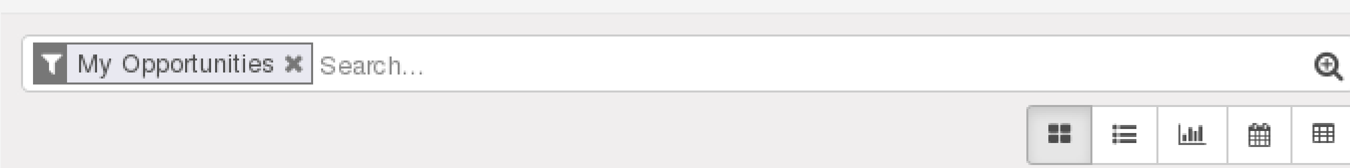
Dashboard & Reporting

DASHBOARD AND REPORTING

You can access your dashboard Apps drawer → Sales



Pipeline and activities analytics is accessible under Reports menu, you can also use “Search & Filter” tool to customize the displayed data or export certain data to an excel sheet



Click on the + sign to show filter

Thank you