CRM

Introduction to CRM

The CRM module in DellSuite is designed to enhance customer interactions and streamline sales processes.

- **Lead Management**: Capture, track, and nurture potential leads through various stages of the sales funnel.
- **Opportunity Tracking**: Manage sales opportunities, track progress, and forecast potential revenue.
- **Customer Management**: Maintain detailed customer profiles, including contact information, transaction history, and communication logs.
- **Activity Management**: Schedule and track meetings, calls, and follow-ups to ensure effective customer engagement.
- **Quotations and Sales Orders**: Generate and manage quotes and sales orders to streamline the sales process and ensure accurate order fulfillment.
- **Reports and Analytics**: Access comprehensive reports and analytics to gain insights into sales performance, customer behavior, and CRM effectiveness.

The CRM module helps businesses improve customer relationships, optimize sales efforts, and drive growth by providing a unified platform for managing customer interactions and sales activities.

CRM Masters

Masters in CRM refers to the core data entities that are vital for managing customer relationships and sales processes in the system. These data elements serve as the foundation for various CRM activities and operations

By maintaining these core master data entities in CRM, users can effectively manage their customer relationship activities, streamline sales processes, track interactions, analyse overall performance, and make informed decisions to drive business growth and success.

Territory

A Territory is a geographical region you do business in.

In DellSuite, a Territory is used to classify Customers, Addresses, in accounting report, and to allocated sales targets.

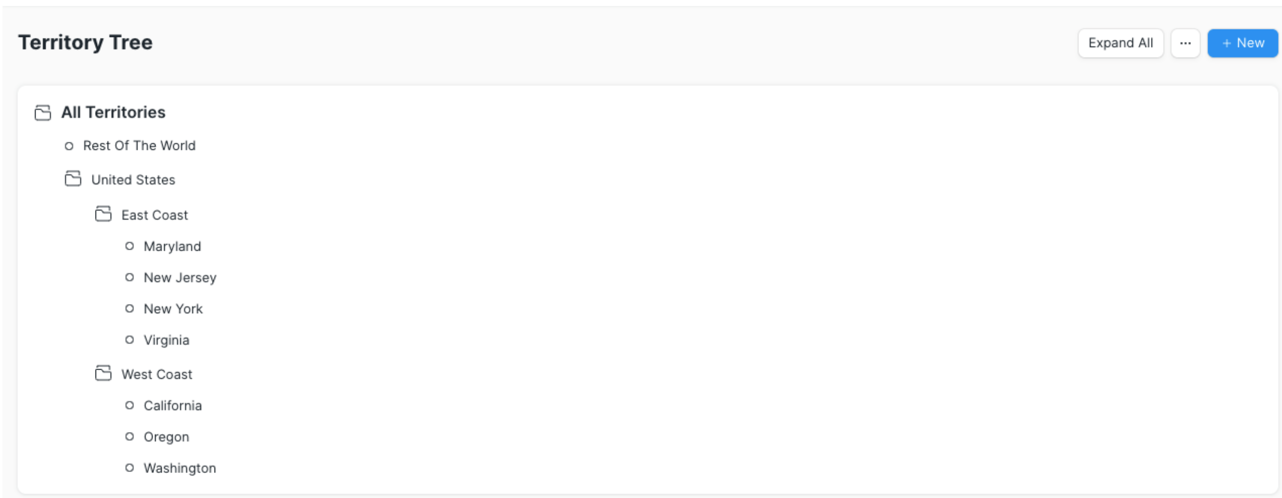
To access the Territory list, go to:

Home > Selling > Settings > Territory

1. How to create a Territory

1. Go to the Territory list, click on New.
2. Tick 'Group Node' if there'll be sub-territories under this Territory. For example, France is a group Territory and Paris is a sub-territory.

3. Save.



You can add multiple sub-territories under a parent territory. On saving, a territory can be selected in transactions and reports.

2. Features

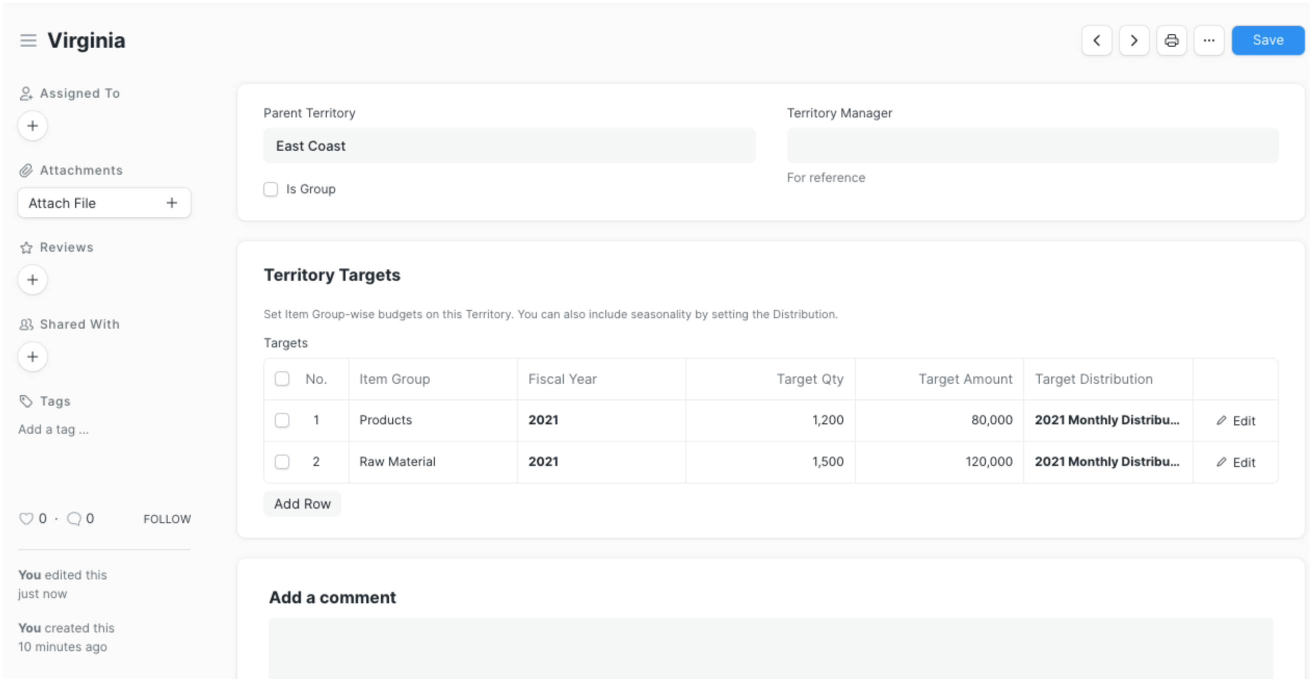
2.1 Assigning a Territory manager

You can assign a Territory Manager who looks after the Sales of this region. This is a

2.2 Setting Sales Targets

Here you can set specific sales targets based on the following fields:

- Item Group
- Fiscal Year
- Target Qty
- Target Amount
- Target Distribution



To know more about setting sales targets, visit the Sales Person Target Allocation page

Lead Source

Lead Source is a channel through which the leads are generated.

It is important to track the source from which you are getting the leads. This will help in measuring effectiveness of various marketing campaigns and allocate the budgets accordingly.

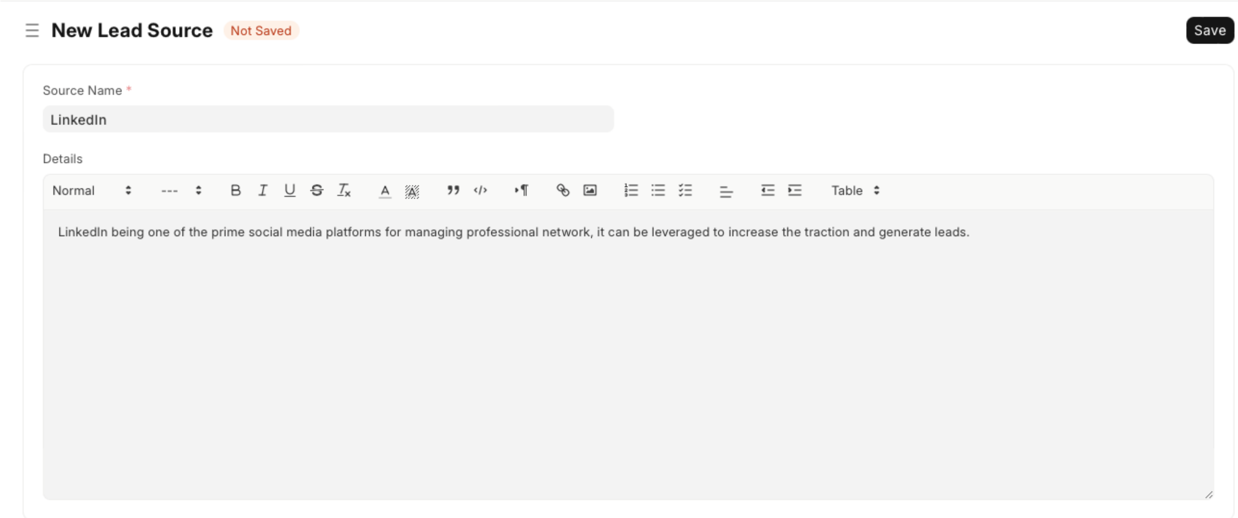
To access the Lead Source list, go to:

Home > Selling > Settings > Lead Source

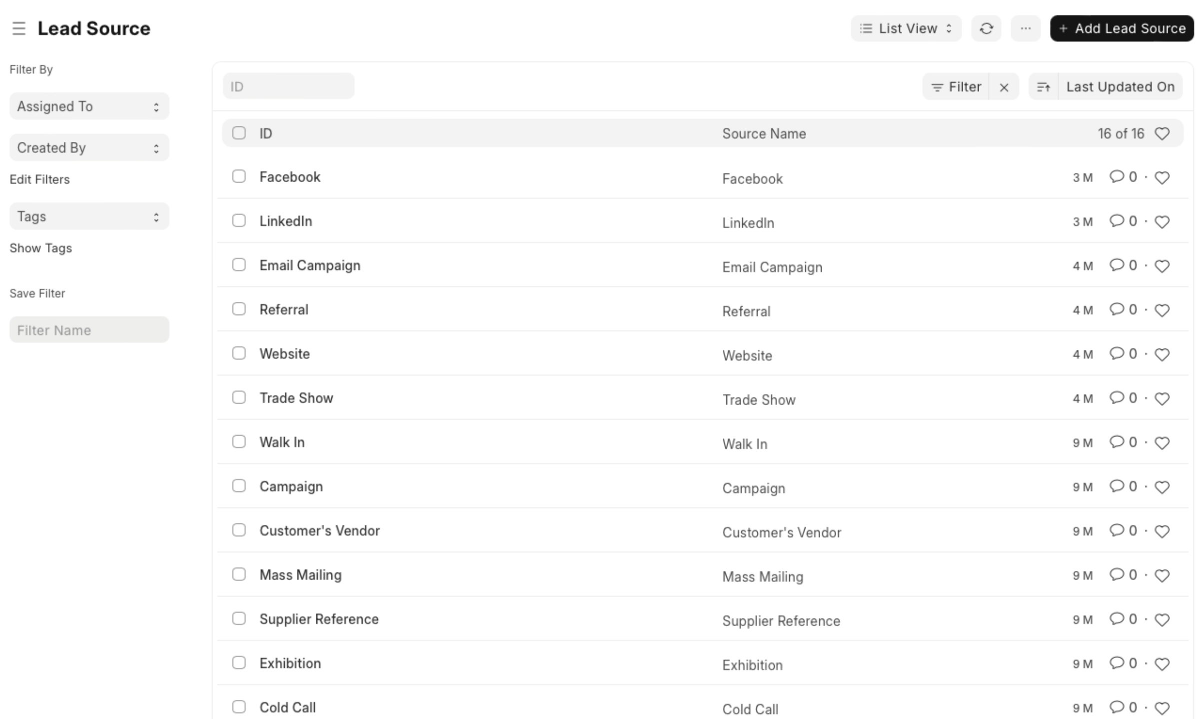
1. How to Create a Lead Source

1. Go to the Lead Source list, click on New.
2. Enter 'Source Name'.
3. Enter 'Details' if you need to elaborate more on the source.

Typical lead sources are contact forms on your website, marketing campaigns, events, references, ads on social media etc.



The system will allow you to maintain a list of various lead sources leveraged by you.



Customer Group

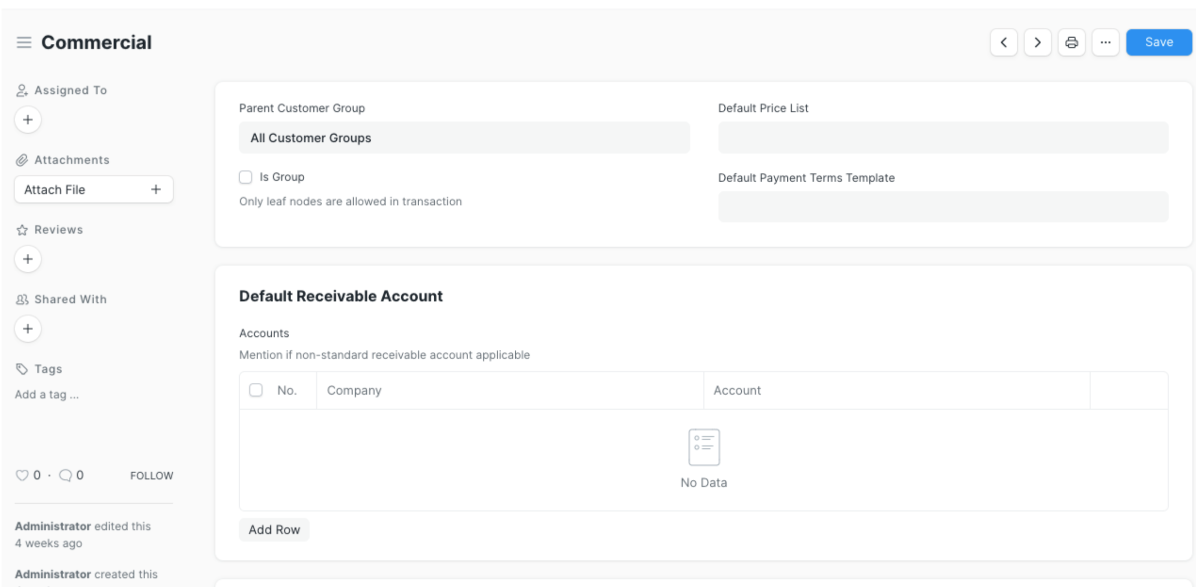
Customer Group is an aggregation of customers that are similar in some way.

Customer groups allow you to organize your customers. Typically, Customers are grouped by market segment based on the domain in which a business operates. Customer Groups are created in hierarchical manner in DellSuite. You can create a main customer group and add sub customer groups under it.

You can define a price a list which will be automatically applied to all customers belonging to that group. You can also get trend analysis for each group. Individual, Commercial and Government customer groups are created by default. You can add your own customer groups based on your requirement like retail, wholesale etc.

1. How to Create a Customer Group

1. Go to **CRM > Settings > Customer Group**.
2. Click on a parent customer group like 'All Customer Groups'.
3. Click on 'Add Child'.
4. Enter 'Customer Group Name'.
5. Tick 'Group Node' if you would like to add sub customer groups under this.
6. Click on 'Create New'.



Tip: If you think all this is too much effort, you can leave it at “Default Customer Group”. But all this effort, will pay off when you start getting reports. An example of a sample report is given below:

2. Features

2.1 Assign Credit Limit, Default Price List, and Default Payment Terms Template

You can assign the credit limit, Price List, and Payment Terms and they will be automatically applied when a customer belonging to the customer group is selected in sales transactions like Sales Order and Sales Invoice.

2.2 Default Receivable Account

You need not create a separate accounting ledger for each customer in DellSuite.
Read Common Receivable Account for more details.

If you need a separate receivable account for a customer, you can add the same in 'Default Receivable Account' section.

Customer

A customer, who is sometimes known as a client, buyer, or purchaser is the one who receives goods, services, products, or ideas, from a seller for a monetary consideration.

Every customer needs to be assigned a unique id. Customer name itself can be the id or you can set a naming series for ids to be generated in Selling Settings.

To access the Customer list, go to:

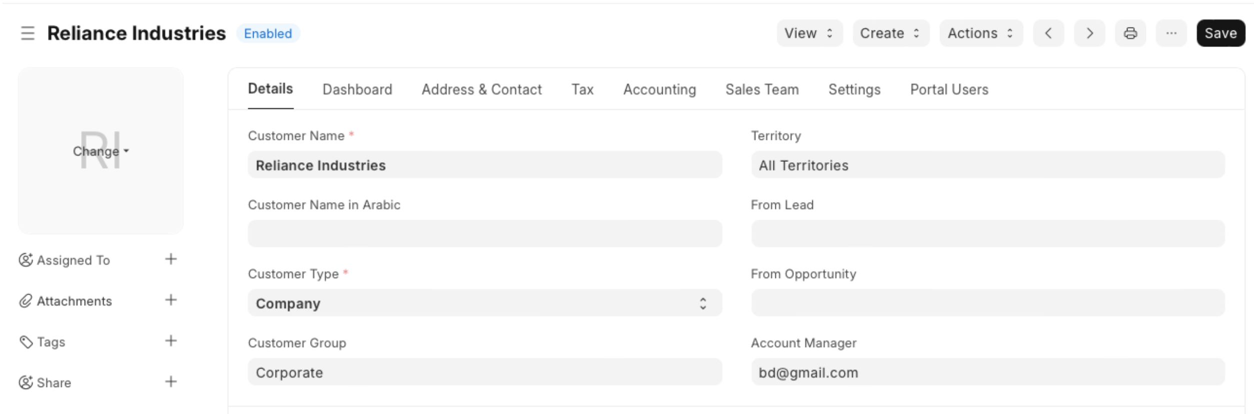
Home > CRM > Sales Pipeline

Or

Home > Selling > Customers

1. How to create a Customer

1. Go to the Customer list and click on New.
2. Enter Full Name of the customer.
3. Select Individual if the customer represents an individual or Company if the customer represents a company in Type field.
4. Select a Customer Group. Individual, Commercial, Non Profit and Government are available by default. You can create additional groups if you need.
5. Select the Territory.
6. If the customer is being created against a lead, you can select the same in From Lead field.
7. Save.



You can disallow sales orders and sales invoices against a customer by clicking on 'Disabled'.

Advanced Tip: If the customer represents one of your own companies then check 'Is Internal Customer'. Check Inter Company Invoices for more details.

You can also upload customer details via the Data Import Tool.

2. Features

General flow of transactions for a customer is as following:

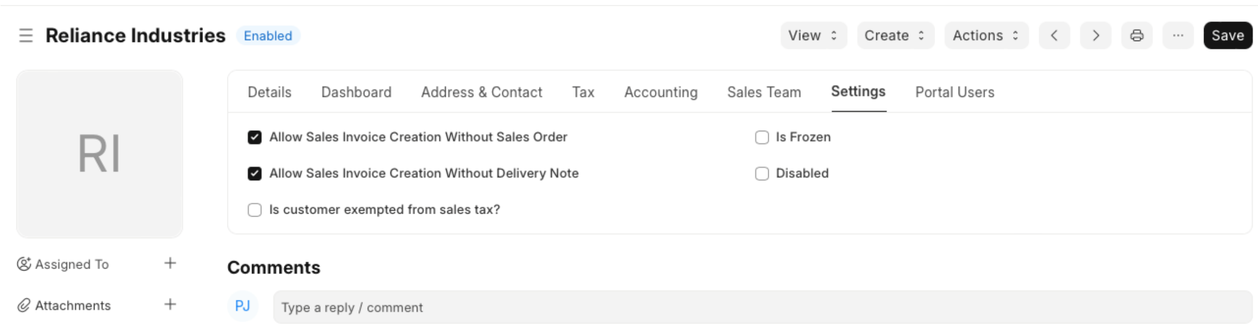
Note: Customers are separate from Contacts and Addresses. A Customer can have multiple Contacts and Addresses.

2.1 Multiple Contacts and Addresses

Contacts and Addresses are stored separately so that you can attach multiple Contacts or Addresses to the customer.

2.2 Allow creation of Sales Invoice without Sales Order and Delivery Note

If the "Delivery Note Required" or "Sales Order Required" option is configured as "Yes" in Selling Settings, it can be overridden for a particular customer by enabling the "Allow Sales Invoice Creation Without Sales Order" or "Allow Sales Invoice Creation Without Delivery Note" in the Customer Master.



2.3 Set Tax Withholding Category

You can set the Tax Withholding Category to set up TCS against eligible customers. For more information, visit the Tax Withholding Category page.

2.4 Default Currency and Price List

DellSuite supports Multiple Currencies and Price Lists.

You can set the default currency to be used for this customer in sales orders and sales invoices by selecting the appropriate currency in Billing Currency.

Similarly, you can set the default price list to be used for this customer in sales orders and sales invoices by selecting the appropriate currency in Default Price List.

2.5 Integration with Accounts

Unlike many accounting software, you need not create a separate accounting ledger for each customer. By default a unified ledger named **Debtors** is created.

However if you specifically need a separate ledger for a customer, first create the ledger under Accounts Receivable in the Chart of Accounts and then add it in ACCOUNTING section of the customer.

Advanced Tip: DellSuite supports Multi-company Accounting. You can use the same customer records in multiple companies. Since an accounting ledger is company specific, you need to select the company and the corresponding ledger in ACCOUNTING section if you decide have separate accounting ledger for a customer.

2.6 Credit Limit and Payment Terms

You can set the credit limit by entering the amount in 'Credit Limit' field. Read Credit Limit for more details.

You can select the default Payment Terms to be applied in sales orders and sales invoices in 'Default Payment Terms Template' field.

2.7 Sales Team and Sales Partner

If you have one or more Sales Person to manage the sales to the customer, you can add them in SALES TEAM section. If multiple sales person are involved you can split the contribution among them. Make sure that the sum of all sales persons contribution equals to 100%.

Check Sales Persons in Sales Transaction for more details.

A Sales Partner is a third party distributor / dealer / commission agent / affiliate / reseller who facilitates your products/services sales, for a commission. If you sell your products/services to the customer through a sales partner you can set it in 'Sales Partner' field and mention the 'Commission Rate' for calculation of commission.

2.8 Loyalty Program

If you would like offer a Loyalty Program to the customer, select the same in Loyalty Program field.

2.9 View Accounting Ledger and Accounts Receivable

Click on Accounting Ledger button to view all accounting transactions with the customer.

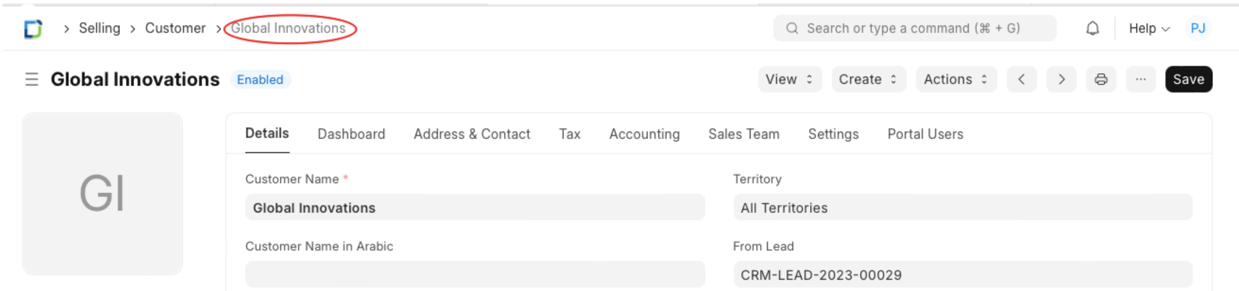
Click on Accounts Receivable button to view the details of all outstanding invoices.

2.10 Set Customer Id, Default Customer Group, Territory, and Price List

You can set how a unique id should be generated each the customer in Selling Settings.

- **Naming Series**: If you would like a unique id to be generated for each customer based on the naming series select 'Naming Series' in Customer Naming By.

- **Customer Name**: If customer name itself should be used as an id then select 'Customer Name' in Customer Naming By. In this case, if you create two customers with identical names, **- 1** will be suffixed to the second customer.



You can set the default customer group, territory and price list in Selling Settings.

You can customize the Customer DocType using Customize Form tool.

Sales Person

Sales Person is a person who sells your products/services.

Sales Persons are created in hierarchical manner in DellSuite. You can create sales persons and add other sales persons under the main sales persons.

To access the Sales Person list, go to:

Home > Selling > Selling > Sales Person

It can also be accessed from: Home > CRM > Settings > Sales Person

1. How to Create a Sales Person

1. Go to the Sales Person list and click on New.
2. Enter the Sales Person Name.
3. Select the Employee for the Sales Person.
4. Tick 'Group Node' checkbox, if you would like to add more Sales Person under this Sales Person.
5. Click on 'Create New'.

2. Features

2.1 Sales Person in Transactions

You can use Sales Person sales transactions like Sales Order, Delivery Note and Sales Invoice. Read Sales Persons in Sales Transactions for more details.

2.2 Assign Sales Targets to Sales Person

You can assign sales target for sales person and track the progress. Read Sales Person Target Allocation for more details.

Sales Stage

A Sales Stage indicates the level at which an opportunity is in the sales cycle.

Generally high values deals go through a number of stages before the sale is concluded. You will have to nurture high value opportunities over a period of time before you can successfully close a sale.

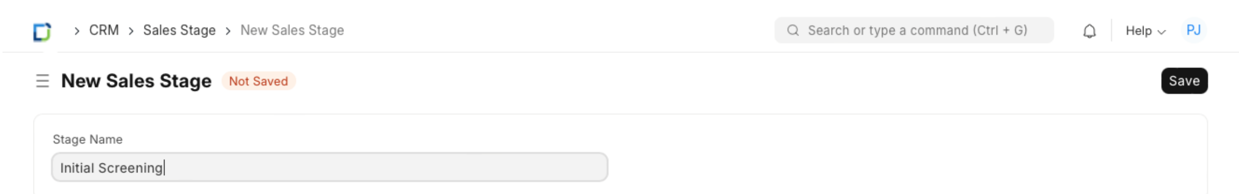
You can create the sales stages and in each opportunity you can select the stage it is in and update it as you nurture the opportunity. This helps you getting an overview of how many opportunities you have in each stage.

To access Sales Stage, go to:

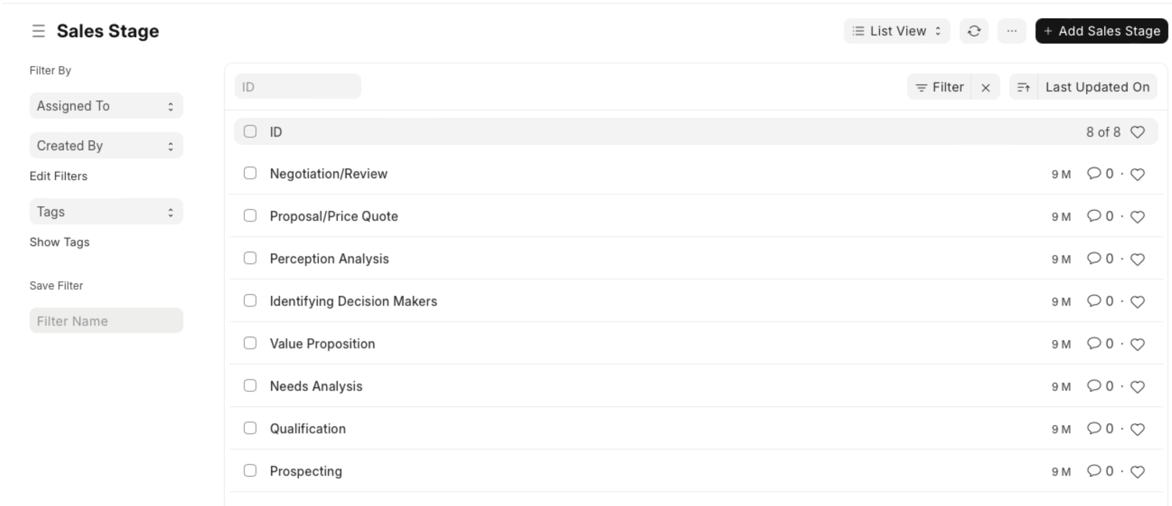
Home > CRM > Settings > Sales Stage

1. How to Create a Sales Stage

1. Go to the Sales Stage and click on New.
2. Enter the Stage Name.



The system allows you to maintain a list of different sales stages.



Opportunity Type

'Opportunity Type' indicates the broad category of opportunity like Sales, Support, Maintenance, Partnership etc.

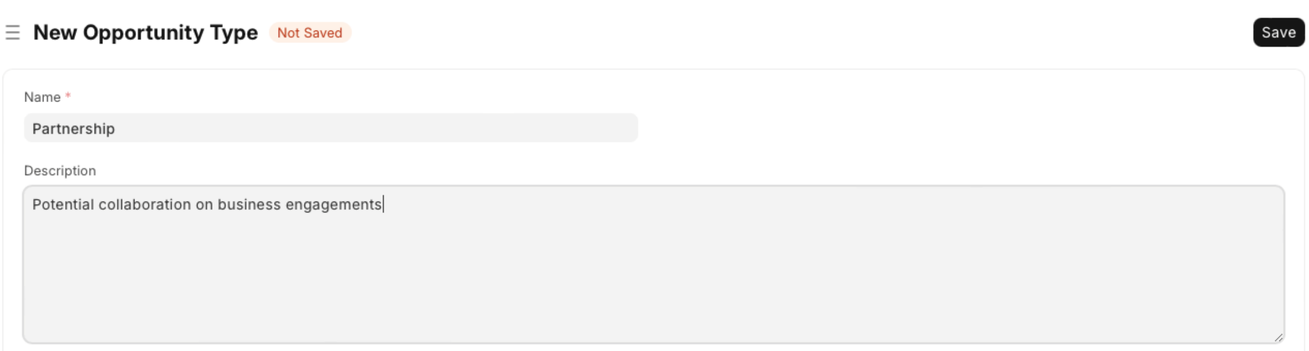
Adding the appropriate opportunity type helps in assigning the opportunity to the right sales executive and also categorize opportunities in different groups.

To access the Opportunity Type, go to:

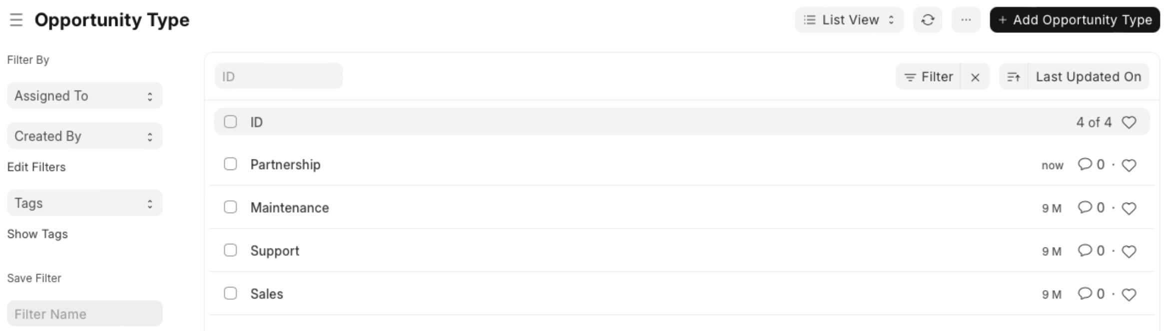
Home > CRM > Settings > Opportunity Type

How to create an Opportunity Type

1. Go to the Opportunity list and click on New.
2. Enter 'Name'.
3. Enter 'Description' to elaborate more on the type.



The system allows you to maintain a list of different Opportunity Types.



Contact

Contact represents a person.

A contact may be associated with a Lead, Customer, Supplier, Shareholder, Sales Partner or a User.

You can also add contact as a standalone record without linking it to any of the entities listed above.

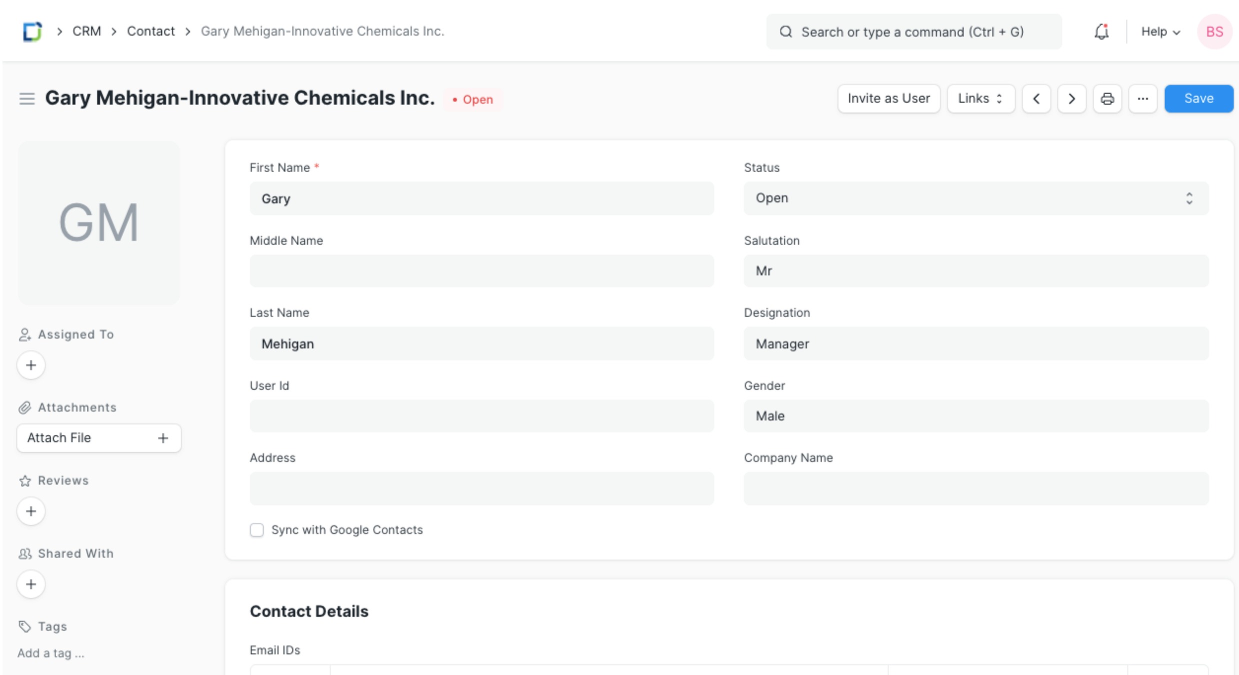
To access the Contact list, go to:

Home > CRM > Sales Pipeline > Contact

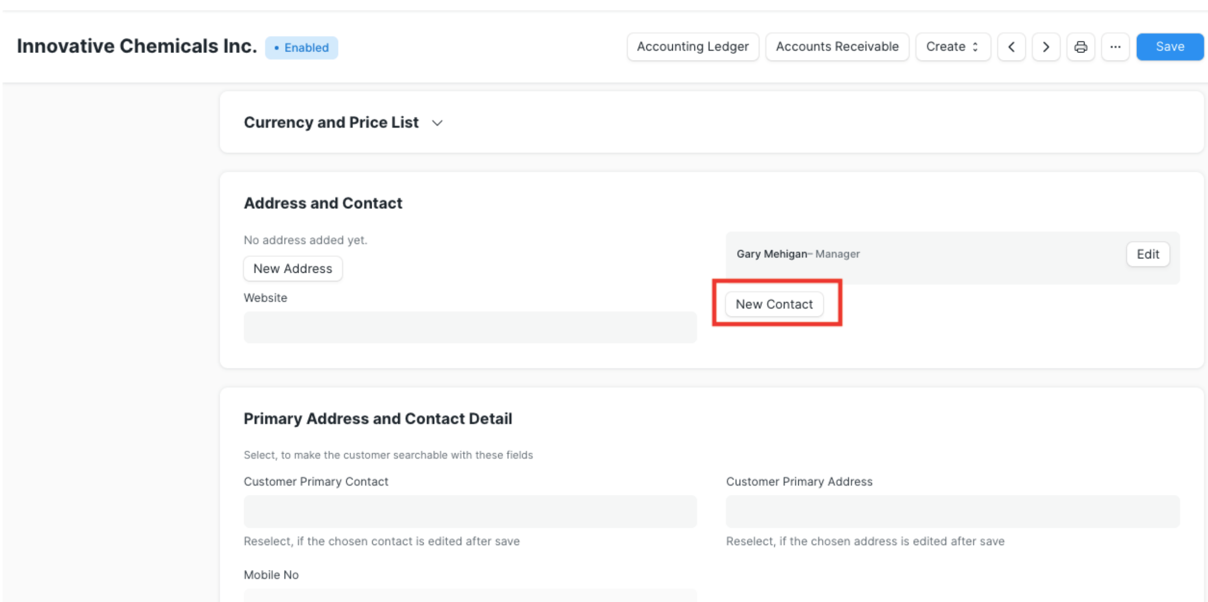
1. How to create a Contact

1. Go to the Contact list and click on New.
2. Enter First Name and Last Name.
3. Choose the status if the contact is passive, is open to contact or has replied.
4. Enter contact details like email, phone, etc.

5. Save.



You can also add a Contact from the Customer or Supplier record by clicking on “New Contact” button as shown below.



When you have multiple contacts against an entity like customer/supplier, you can check 'Is Primary Contact' to indicate the preferred contact. The primary contact will be chosen automatically in transactions like sales order and sales invoice.

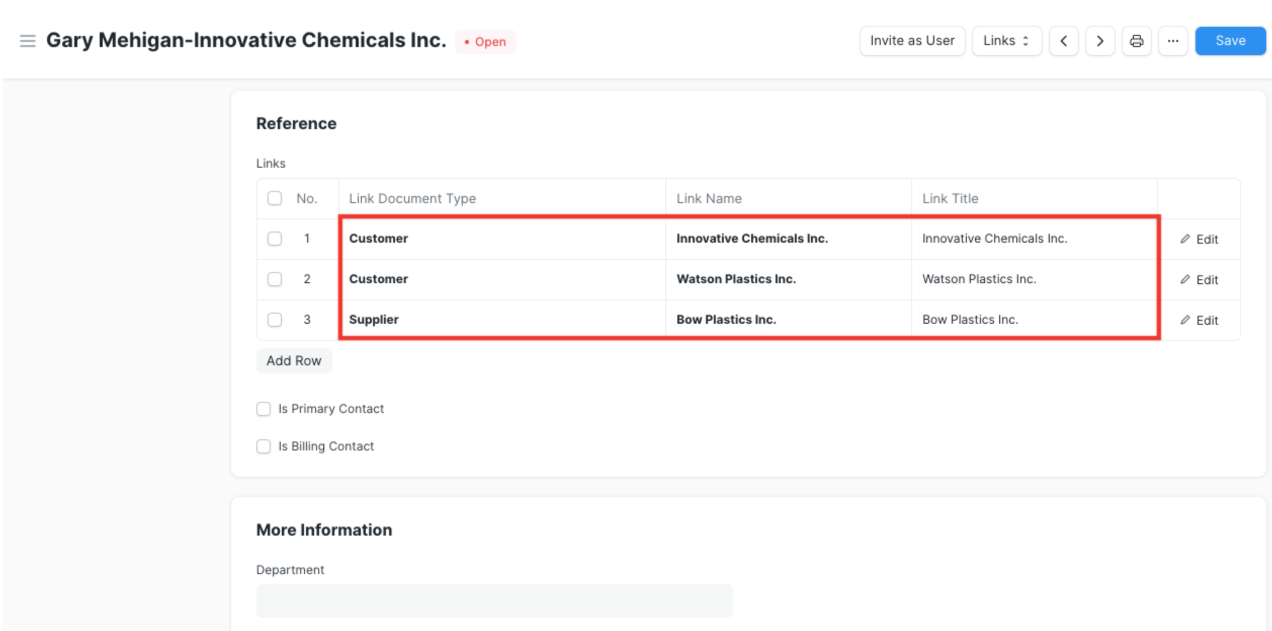
To Import multiple contacts from a spreadsheet, use the Data Import Tool.

2. Features

2.1 Link a Contact to Multiple Entities

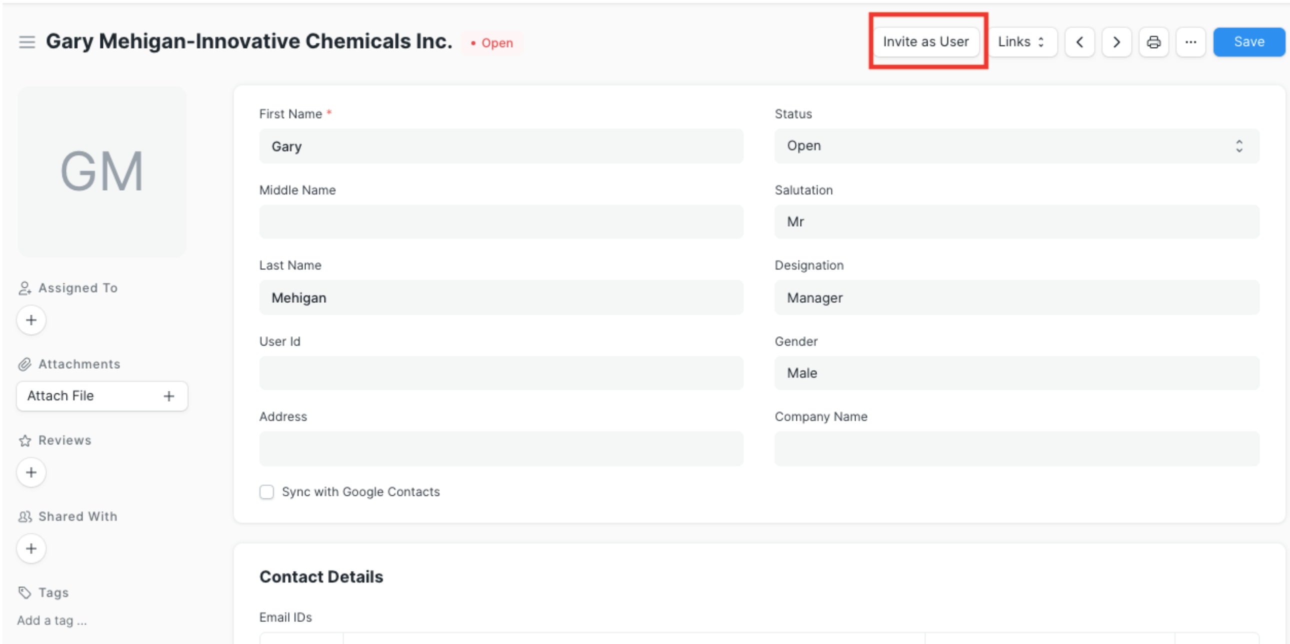
A contact may be linked to multiple customers or multiple suppliers.

A contact can also be linked to customers and suppliers at the same time.



2.2 Invite the Contact as a User

You can allow contacts of your customers and suppliers to log into your DellSuite system and view data relevant to them. Check Customer Portal for more details on this. You can send an email invitation to a contact by clicking on 'Invite as User' button.



Address

You can record the addresses associated with a Lead, Customer, Supplier, Shareholder, Sales Partner or a Warehouse.

You can also add an Address as a standalone record without linking it to any of the entities listed above.

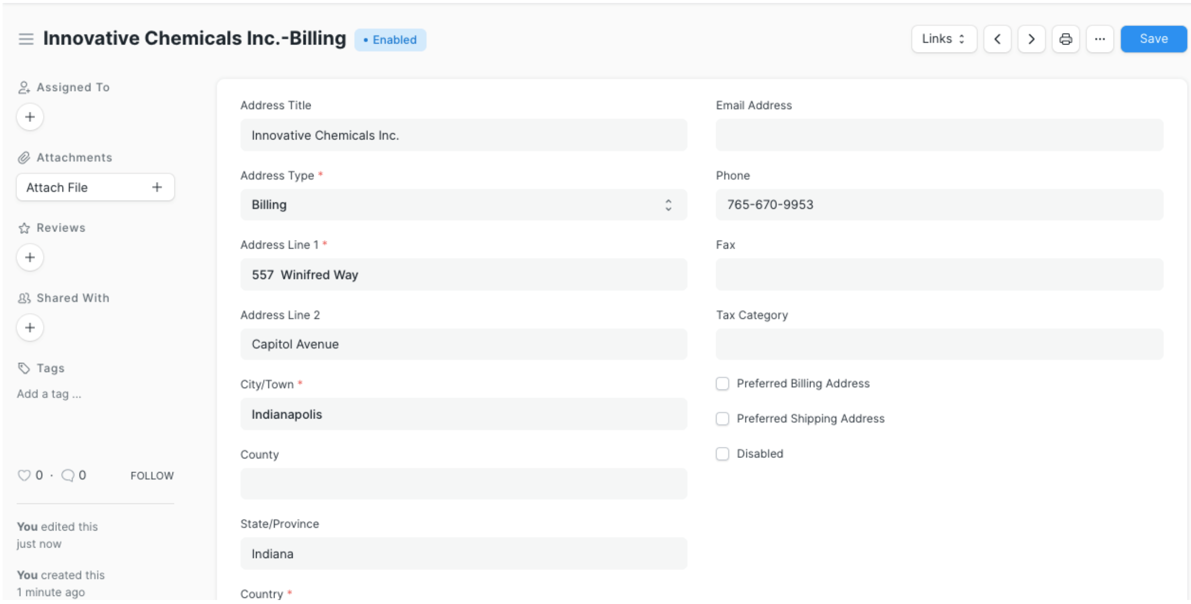
To access the Address list, go to:

Home > CRM > Address

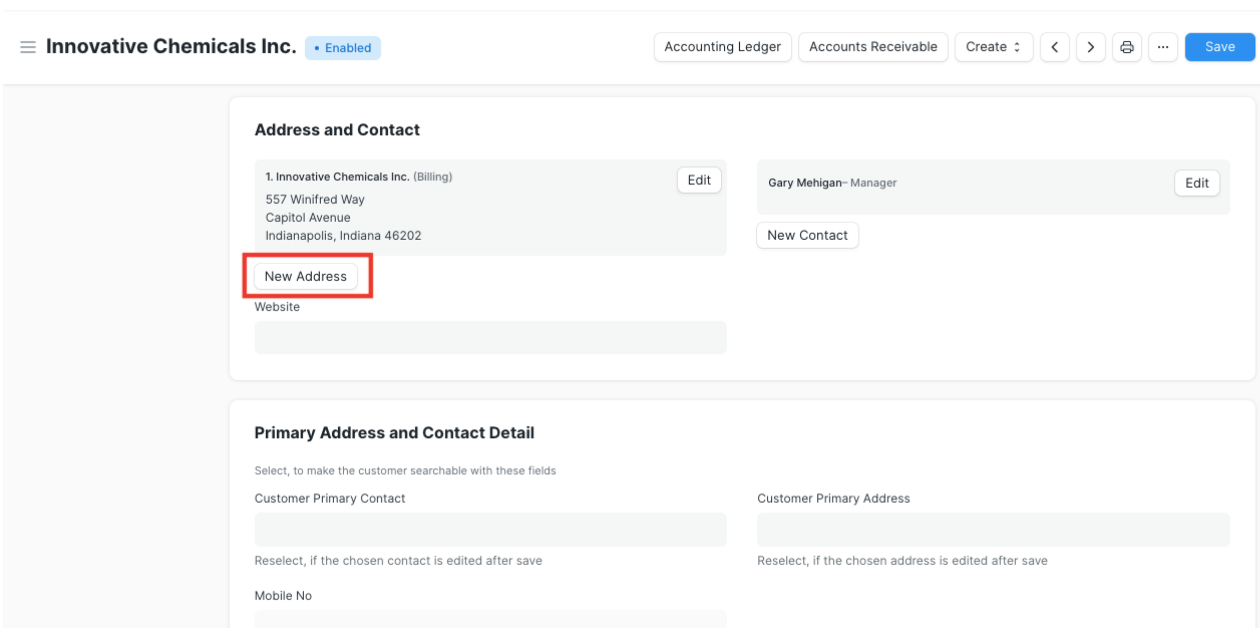
1. How to create an Address

1. Go to the Address list and click on New.
2. Select Address Type.
3. Enter details in Address Line 1, Address Line 2, City/Town, County, State, Country.
4. Enter Email Address, Phone and Fax.
5. Enter Link DocType and Link Name to link this address to customer, supplier etc.

6. Save.



You can also add an Address from the Customer or Supplier record by clicking on “New Address" button as shown below.



To Import multiple addresses from a spreadsheet, use the Data Import Tool.

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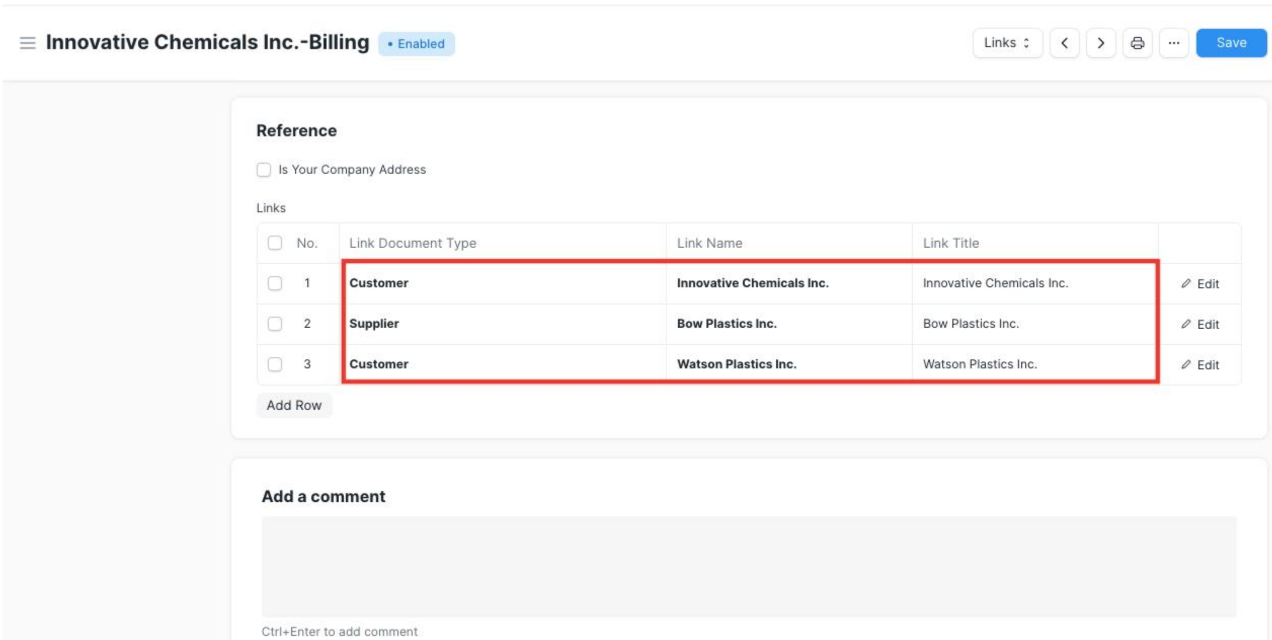
2. Features

2.1 Link an Address to Multiple Entities

An address may be linked to multiple customers or multiple suppliers.

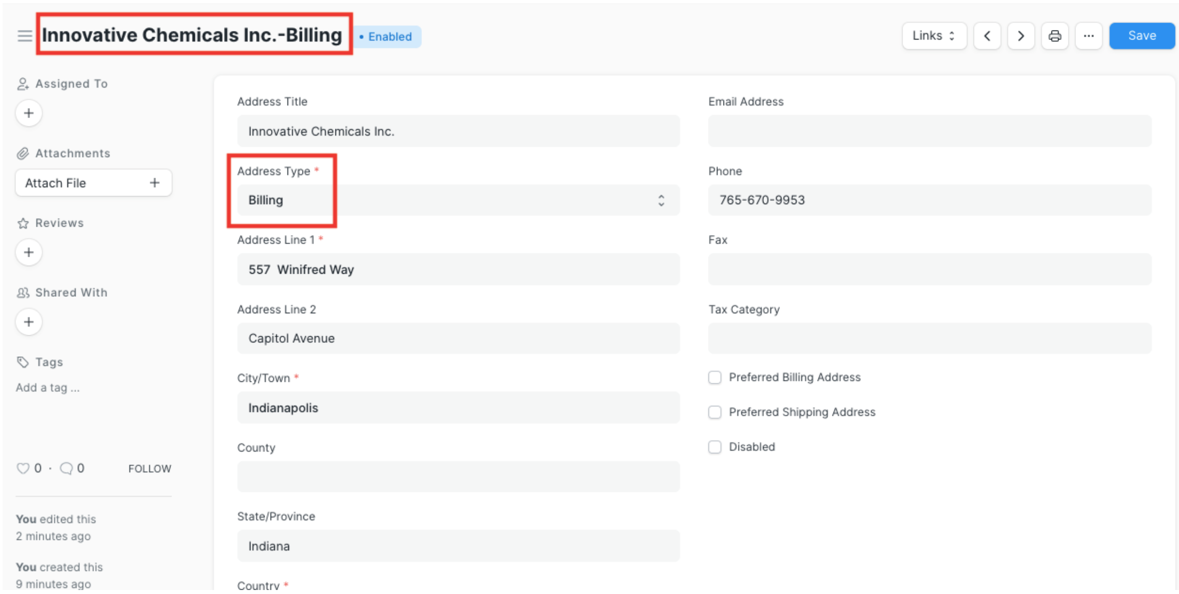
An address can also be linked to customers and suppliers at the same time.



2.2 Address Title

If the address is not linked to any entity you need to manually add a title.

If the address is linked to an entity like a customer or supplier, the title is generated automatically in 'Entity Name-Address Type' format.



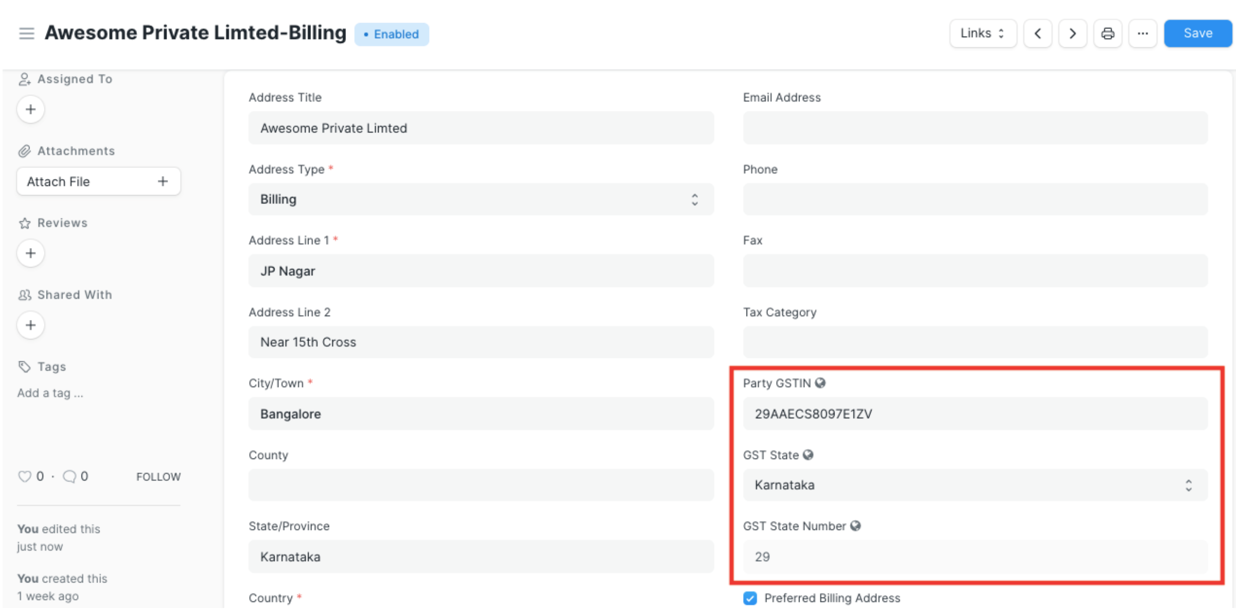
2.3 Preferred Billing Address and Shipping Address

If you check 'Preferred Shipping Address', the address would be automatically added in the Shipping Address in Sales Order, Sales Invoice and Delivery Note transactions.

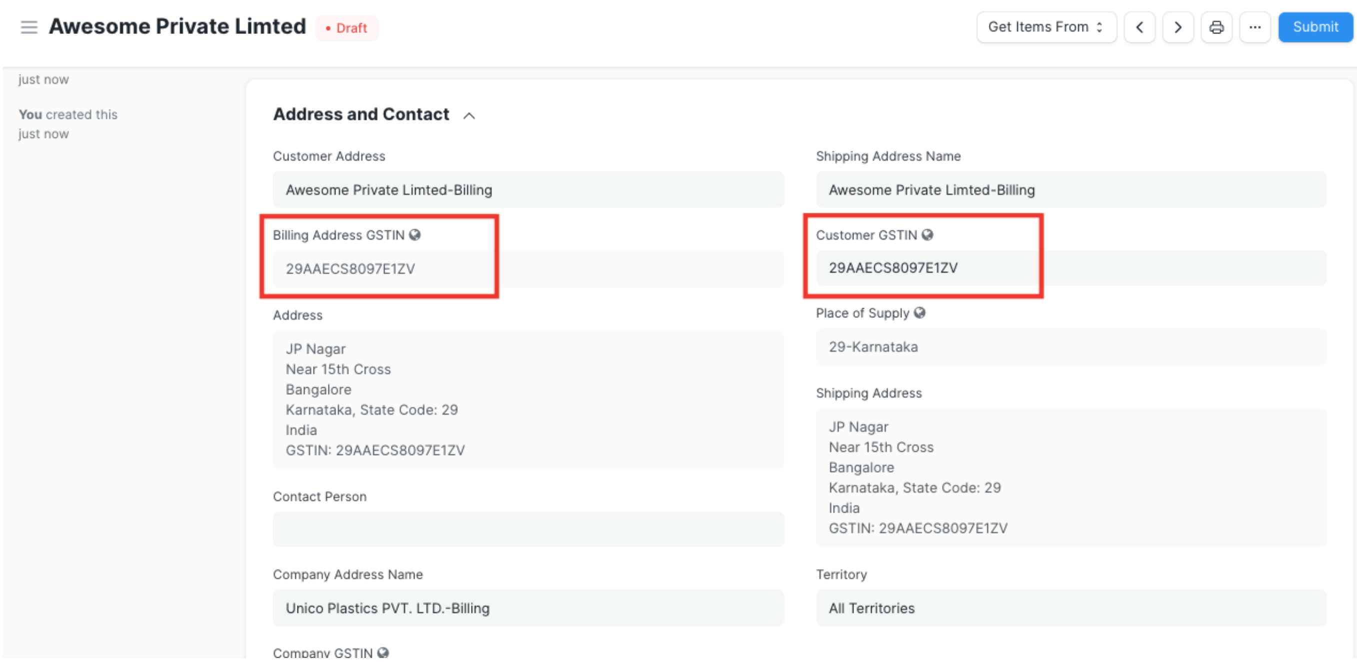
Similarly, if you check 'Preferred Billing Address', the address would be automatically added in the Billing Address in Sales Order, Sales Invoice and Delivery Note transactions.

2.4 GST Localization for India

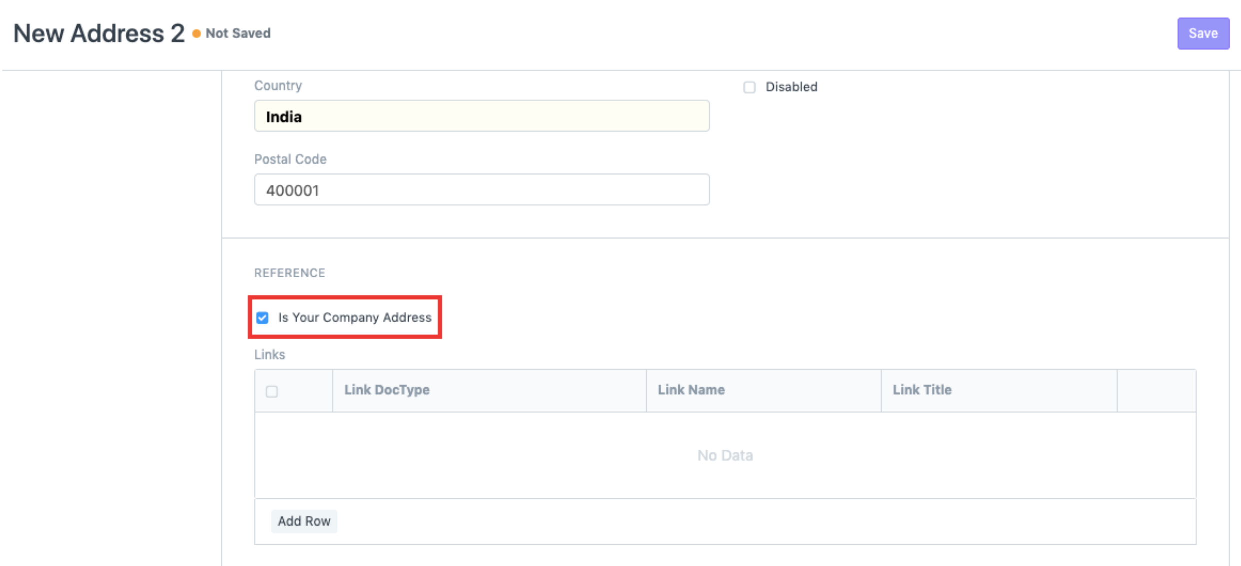
If the customer or supplier has registered under GST, you can enter GSTIN and GST State in Address. Make sure GSTIN entered is in valid format.



In sales transactions along with address, GSTIN is also fetched.



You can also add addresses of your own company's facilities. Check 'Is Your Company Address', select Company in Link DocType, and Company Name in Link Name for such addresses and you can select them in GST Sales Invoice to print your own address.



GSTIN is to be added in Address and not in Customer/Supplier, as one Customer/Supplier may have multiple GSTIN (one for each state where he conducts his business).

Managing Campaigns

In DellSuite CRM, a campaign refers to a structured marketing initiative aimed at achieving specific business objectives, such as generating leads, increasing sales, or promoting brand awareness.

The Campaign feature allows users to plan, execute, and monitor marketing campaigns effectively within the CRM module. By leveraging the Campaign feature in DellSuite CRM, organizations can streamline their marketing efforts, target the right audience with personalized messages, track campaign performance, and ultimately drive business growth through effective marketing initiatives.

Campaign

A Campaign is a full-scale implementation of a sales strategy to promote a product or service.

This is done in a market segment of a particular geographical area to achieve specified objectives.

To access Campaign, go to:

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Home > CRM > Campaign > Campaign
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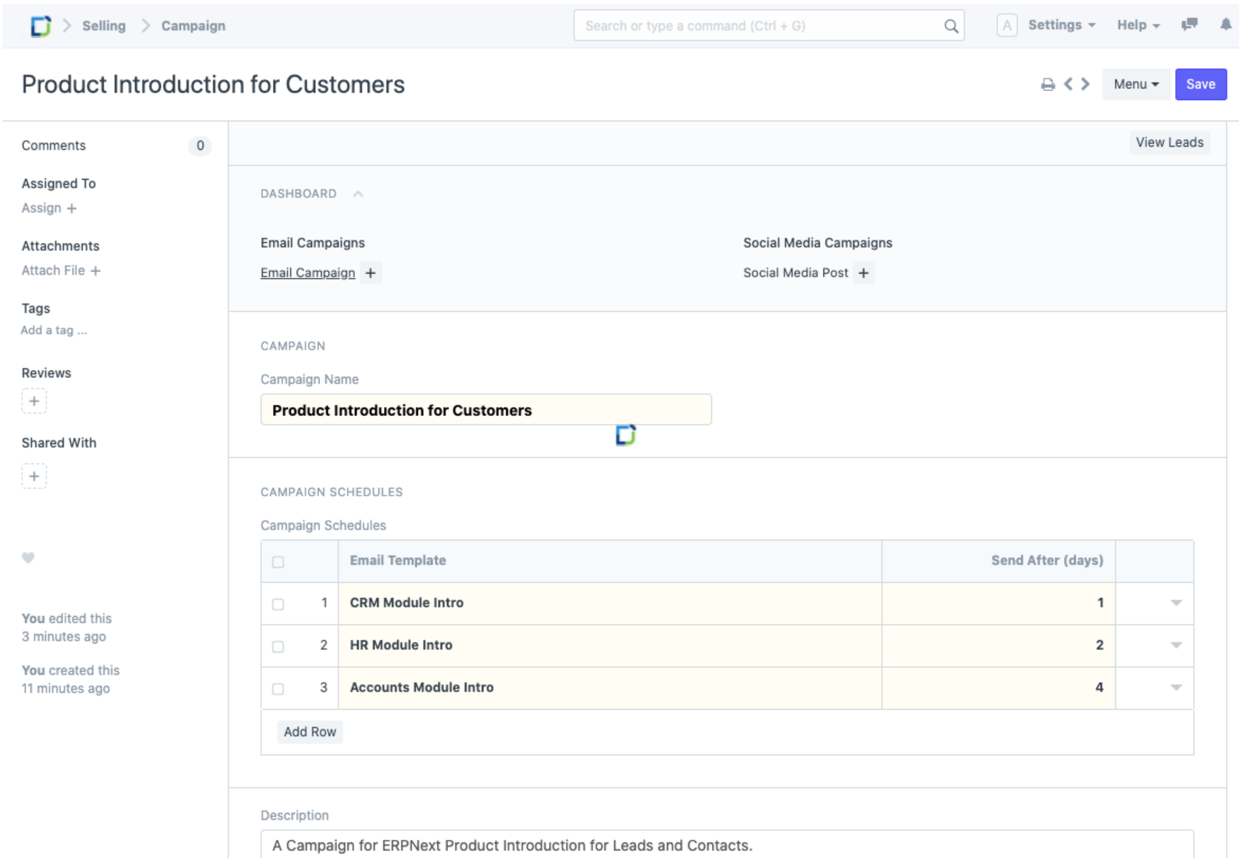


1. How to Create a Campaign

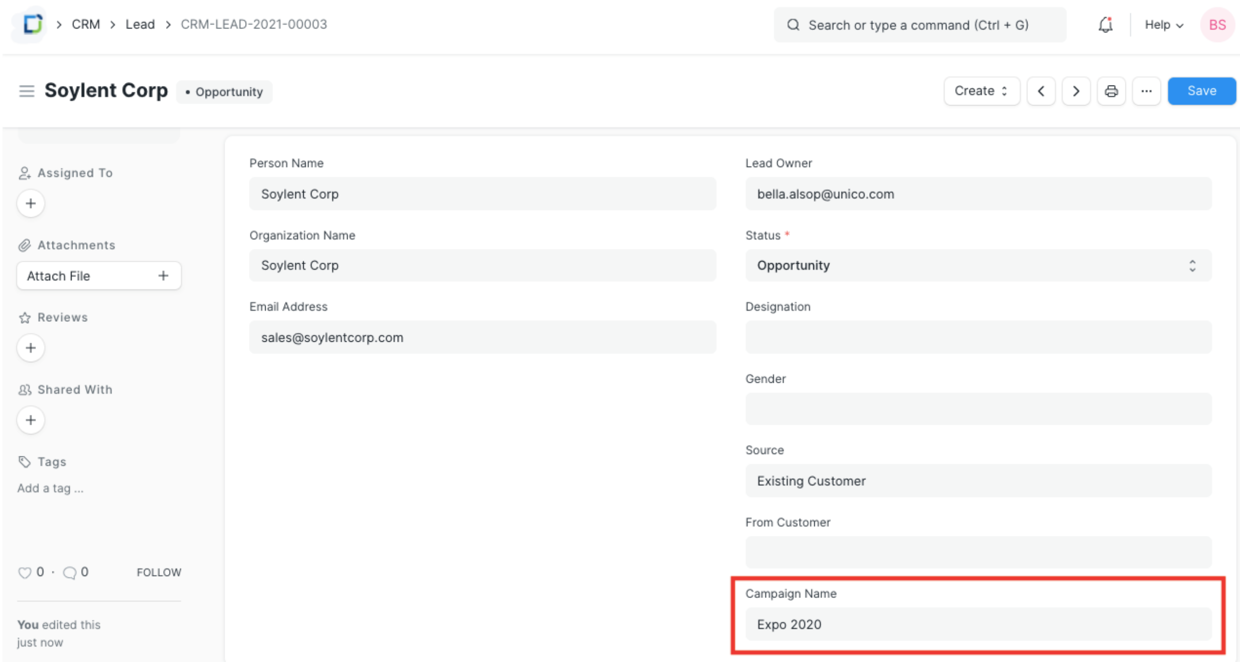
1. Go to the Campaign list, click on new.
2. Enter a name for the campaign.
3. Enter a description to describe what the campaign is about.
4. Save.

2. Features

2.1 Tag Campaign in Lead, Opportunity, and Quotation

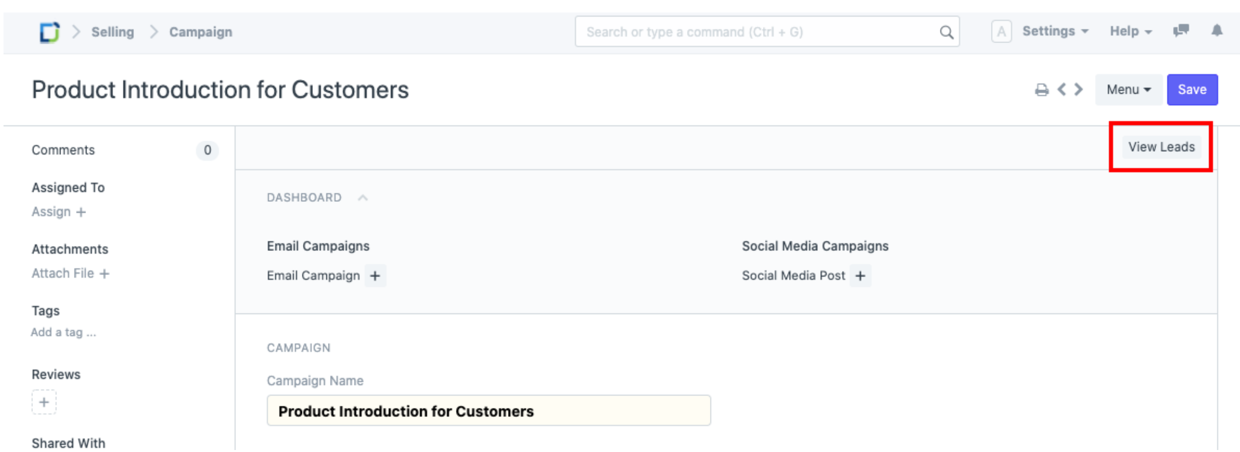
When a marketing campaign generates a lead or an opportunity, you can tag the campaign while creating the Lead or Opportunity. You can also tag the campaign in Quotation.

This helps in assessing the effectiveness of a marketing campaign by calculating the return on investment.



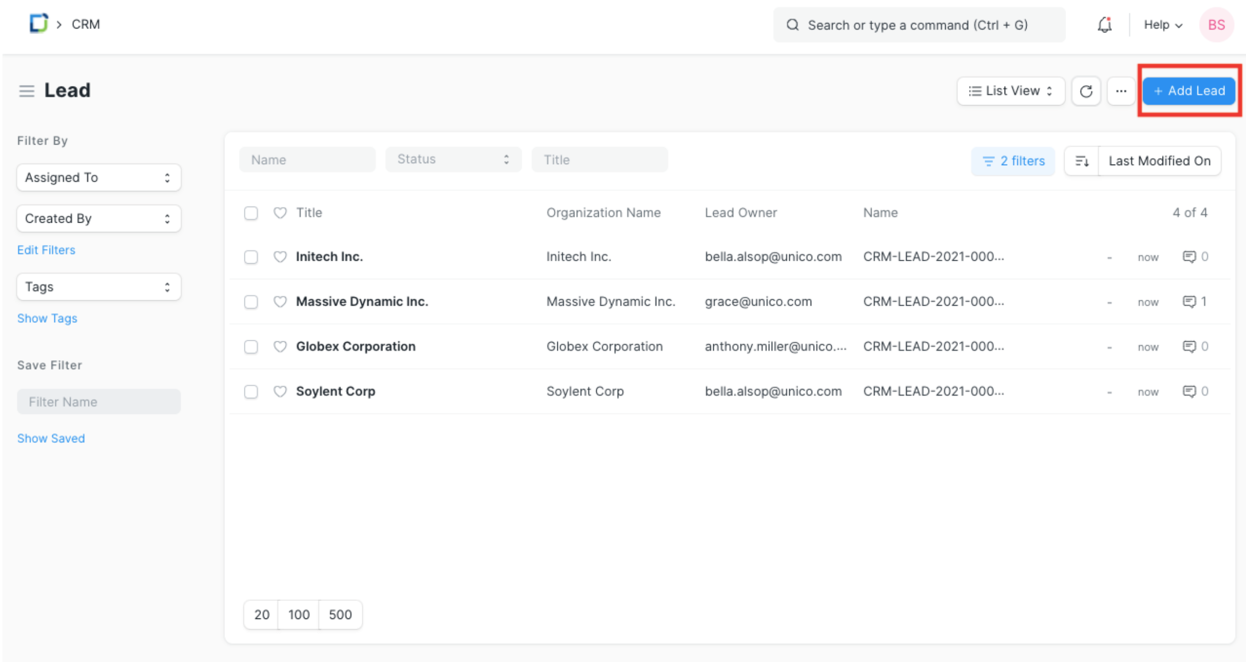
2.2 View Leads Generated by a Campaign

1. Click on 'View Leads' button in the campaign.



2. You will see a filtered list of leads made against the campaign.

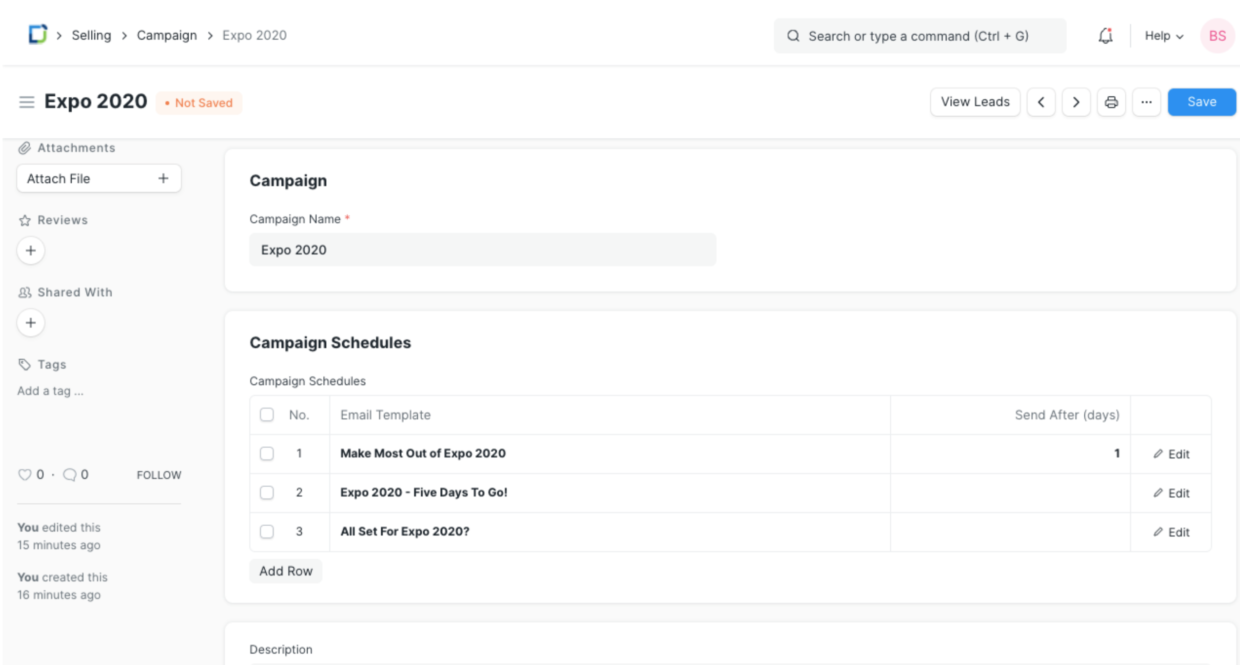
3. You can also create new leads against the campaign by clicking on 'New'



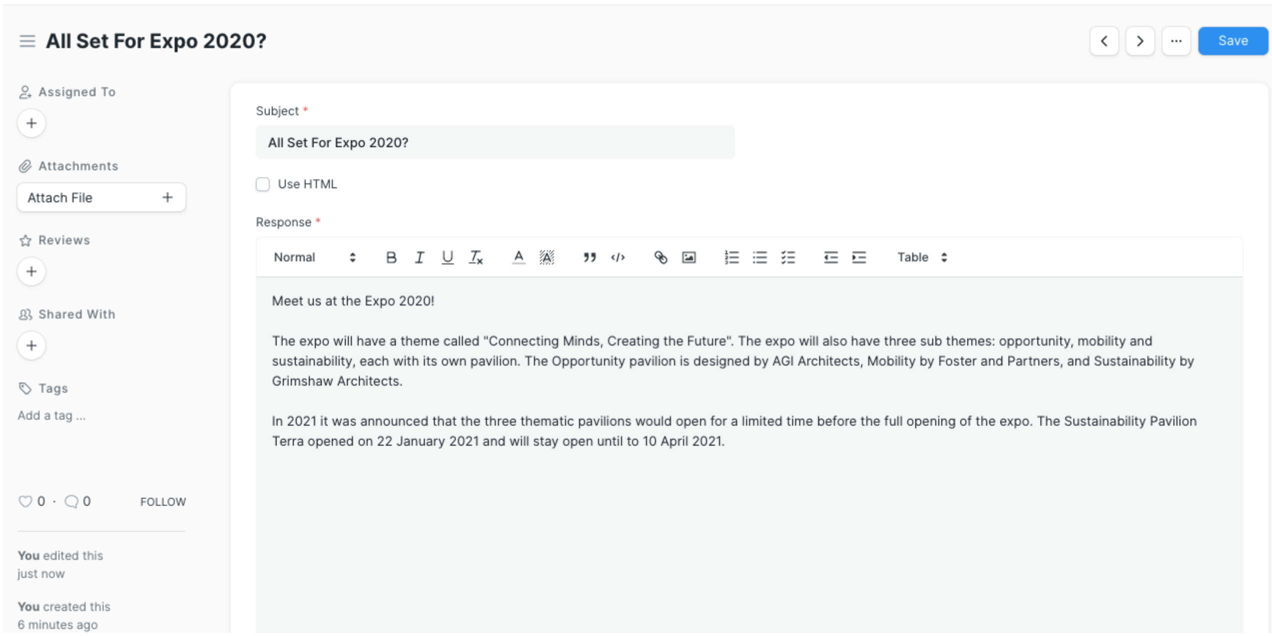
2.3 Set up email schedules for Email Campaigns

If you want to carry out a campaign using emails for your leads or contacts, Email Campaign serves the purpose.

You will have to set up a schedule for the campaign. Click on 'Add Row' to add an entry to the campaign schedule.



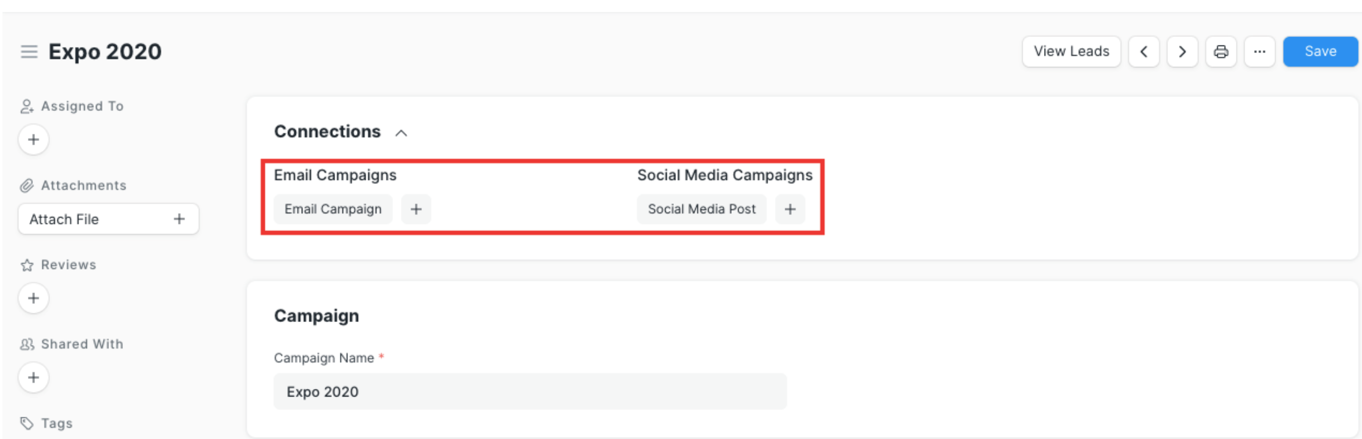
- In **Email Template**, select an 'Email Template' which you would like to send via email to the lead or contact. You can create one as follows:



- In **Send After (days)**, specify the number of days after which the respective email should be sent. Using this field, the day on which email is to be sent is calculated relative to the **Start Date** of **Email Campaign**.

2.4 Dashboard

The Campaign dashboard shows you all the Email Campaigns and Social Media Post linked to the Campaign. You can also create a new Email Campaign and Social Media Post from here.



Email Campaign

An Email Campaign is a coordinated set of emails sent to leads or contacts according to a particular schedule.

Email Campaigns are still one of the most effective ways to reach your Customers, Contacts or Leads and keep them engaged. For example, you could set up Email Campaigns for introducing your product to the customers, with every email revealing an interesting feature of your product.

To create an Email Campaign, go to:

```
Home > CRM > Campaign > Email Campaign
```

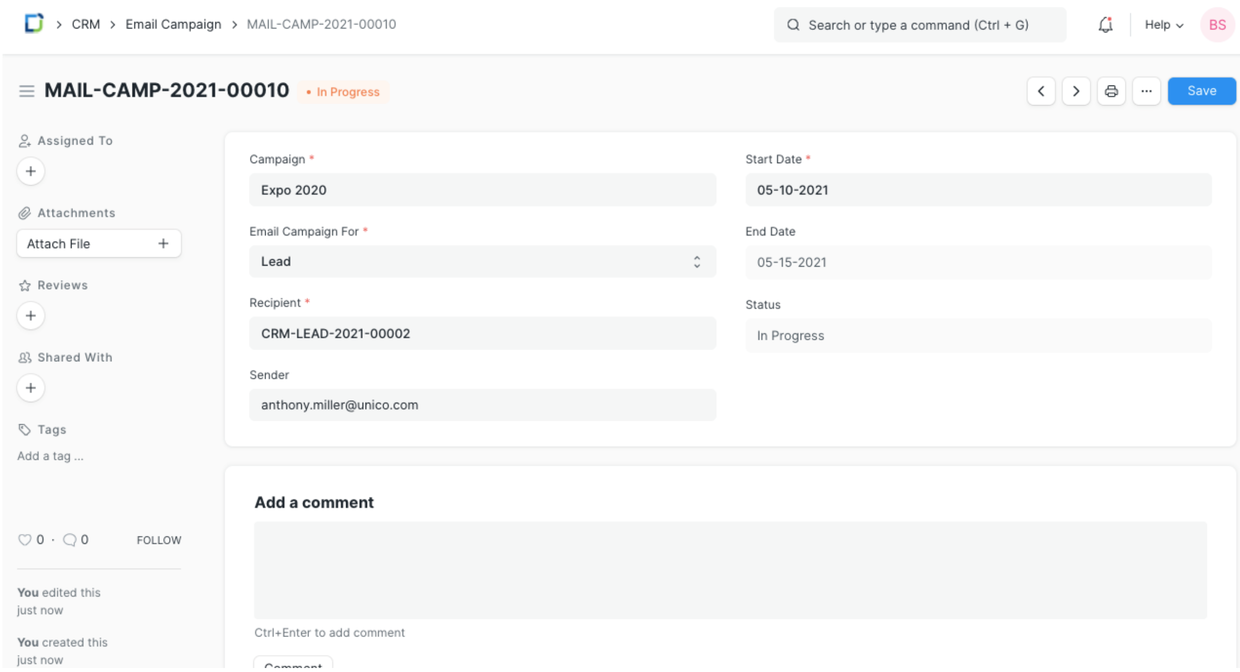
1. Prerequisites

Before creating and using Email Campaign, these need to be created first:

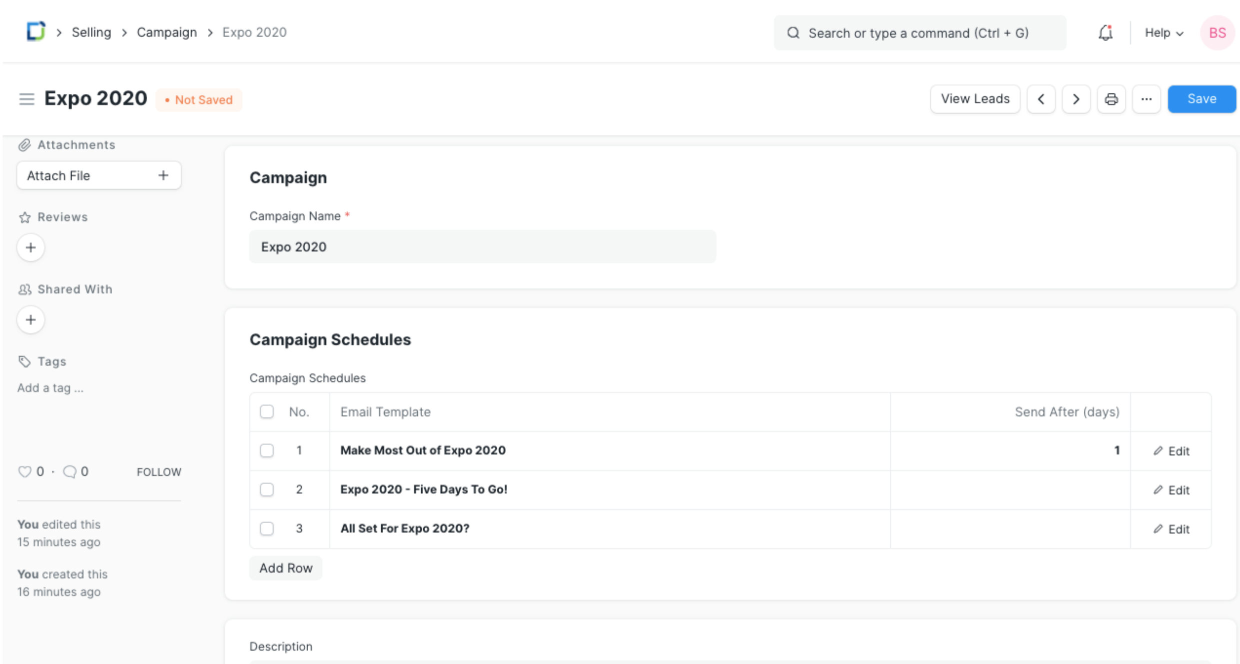
- Campaign
- Lead or Contact or Email Group

2. How to Create an Email Campaign

1. Go to the Email Campaign list, click on New.
2. Select the Campaign for which you want to set up an Email Campaign.
3. Set the 'Start Date' for the Email Campaign.
4. In 'Email Campaign For', select whether you want to set up Email Campaign for a Lead or a Contact or for an Email Group to send to multiple email contacts.
5. In 'Recipient', select the respective Lead or Contact or Email Group for whom you want to start the Email Campaign.
6. In 'Sender', select the user of the system who should be the sender of the emails.
7. Save



The above Email Campaign is for the following Campaign:



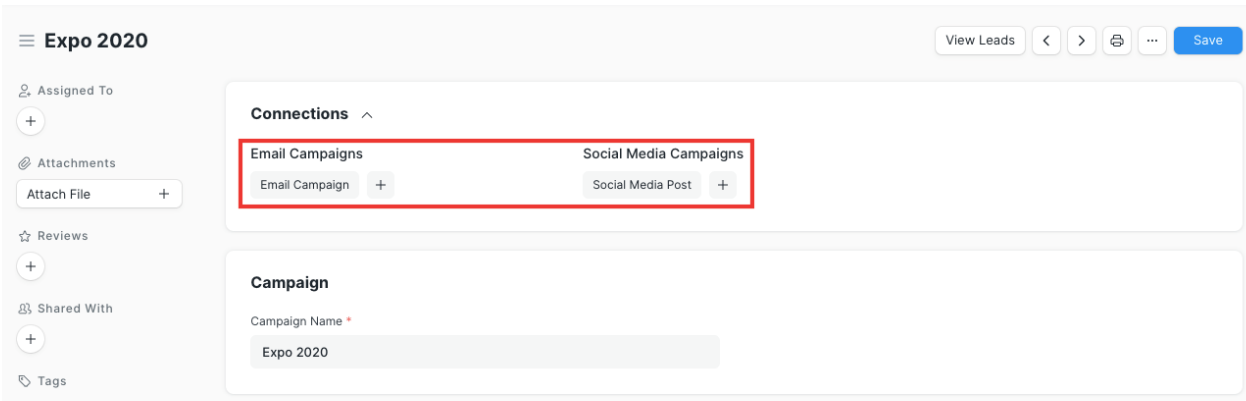
Note: The **Send After (days)** field in Campaign specifies the day on which email is to be sent relative to the Start Date of **Email Campaign**. Notice the 'End Date' in the above Email Campaign. It is '26-07-2019', which is 4 days after the 'Start Date', '22-07-2029', as the Campaign Schedule ends on day 4.

2.1 Create multiple Email Campaigns for a Campaign

You can also create new Email Campaigns for different Leads or Contacts for the same Campaign though the Campaign Dashboard.

1. Go to the Campaign for which you want to create Email Campaigns.

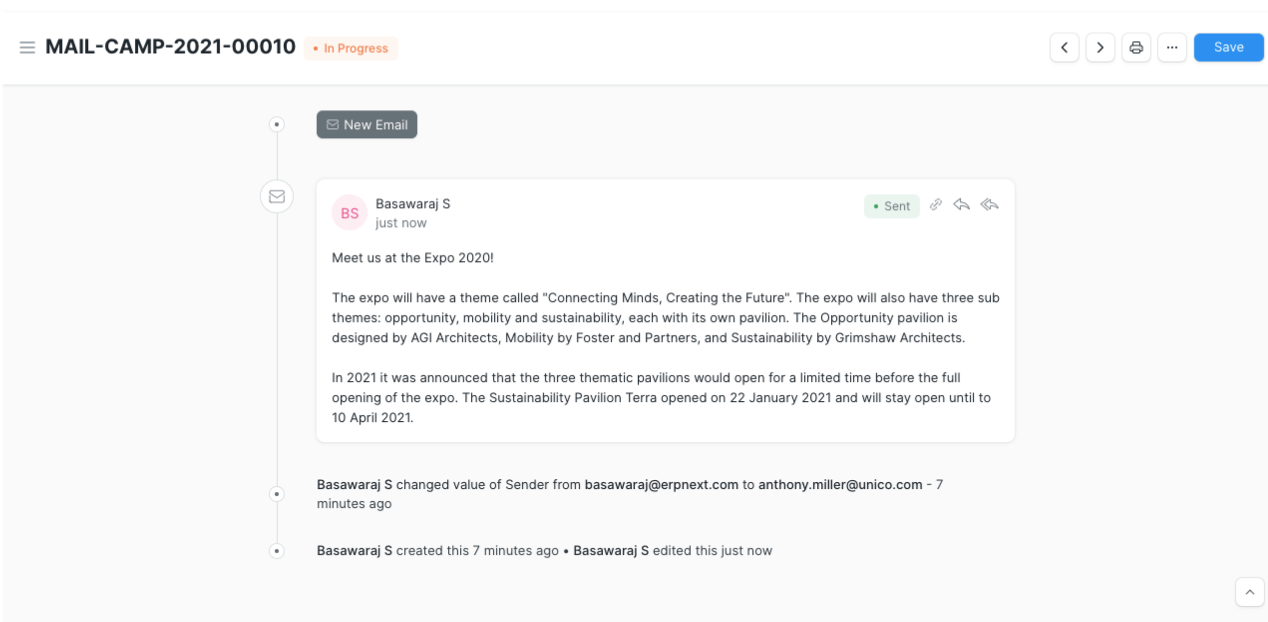
2. Click on + in front of Email Campaigns to create a new Email Campaign for the Campaign.



3. Features

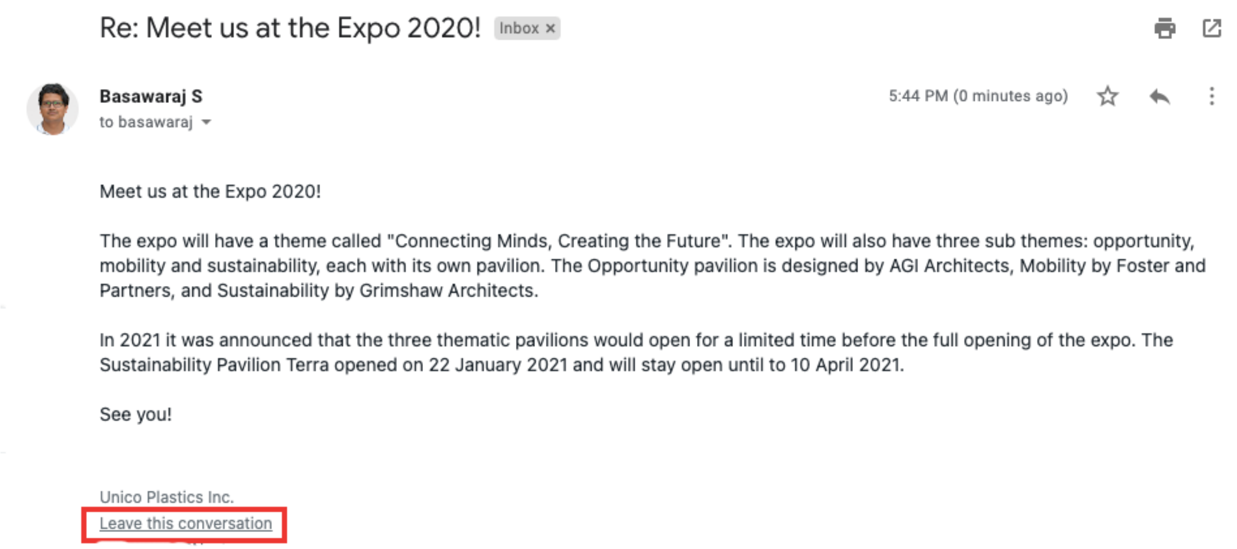
3.1 Linked Communication

When emails are sent to the respective leads or contacts, Communication is linked to the Email Campaign document. You can view all the emails sent in your document.

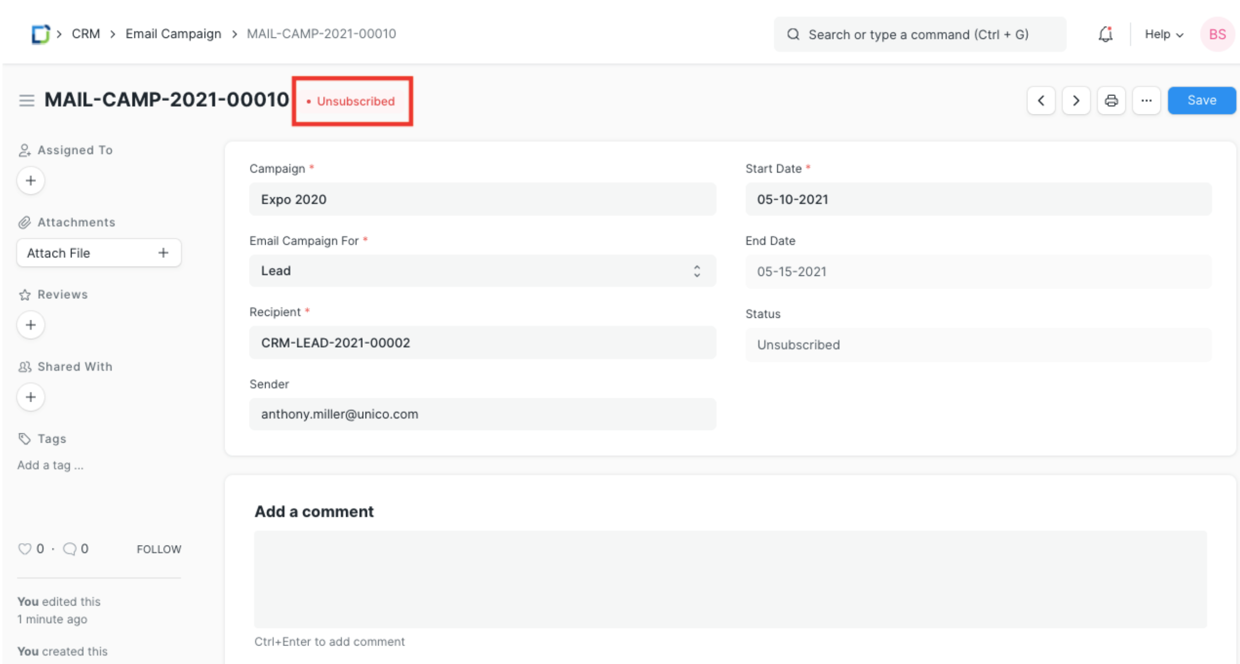


3.2 Unsubscribe from Email Campaign

If a lead or contact does not want to continue getting emails regarding the campaign, he or she can unsubscribe from the Email Campaign via the unsubscribe link sent with the email.

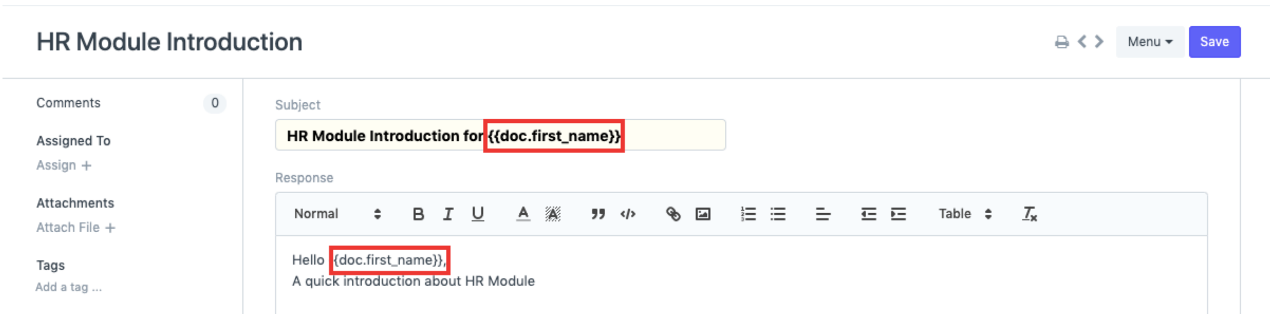


When the lead or contact unsubscribes, the status of the Email Campaign document changes to 'Unsubscribed'.

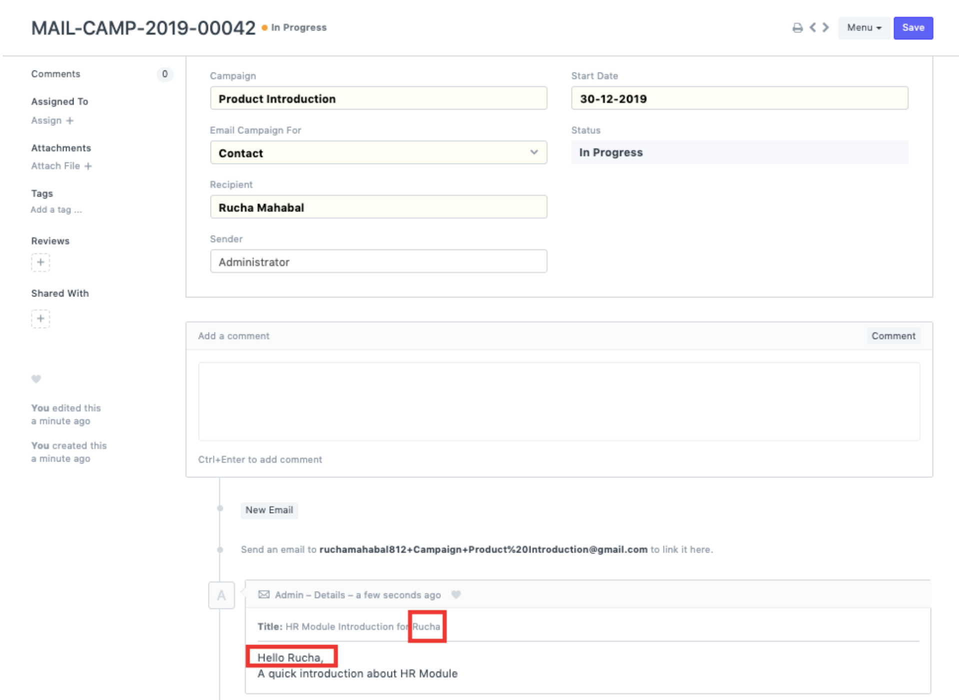


3.3 Use Lead or Contact fields in Email Template

The Email Template has the context of the document you have specified in the 'Email Campaign For' field. If you want to display the fields from your Lead or Contact document in your Email Template you will have to use `doc.fieldname` for the same. For example, if 'Email Campaign For' is 'Contact', you can mention the 'first name' of your Contact as `doc.first_name` in the Email Template as shown below:



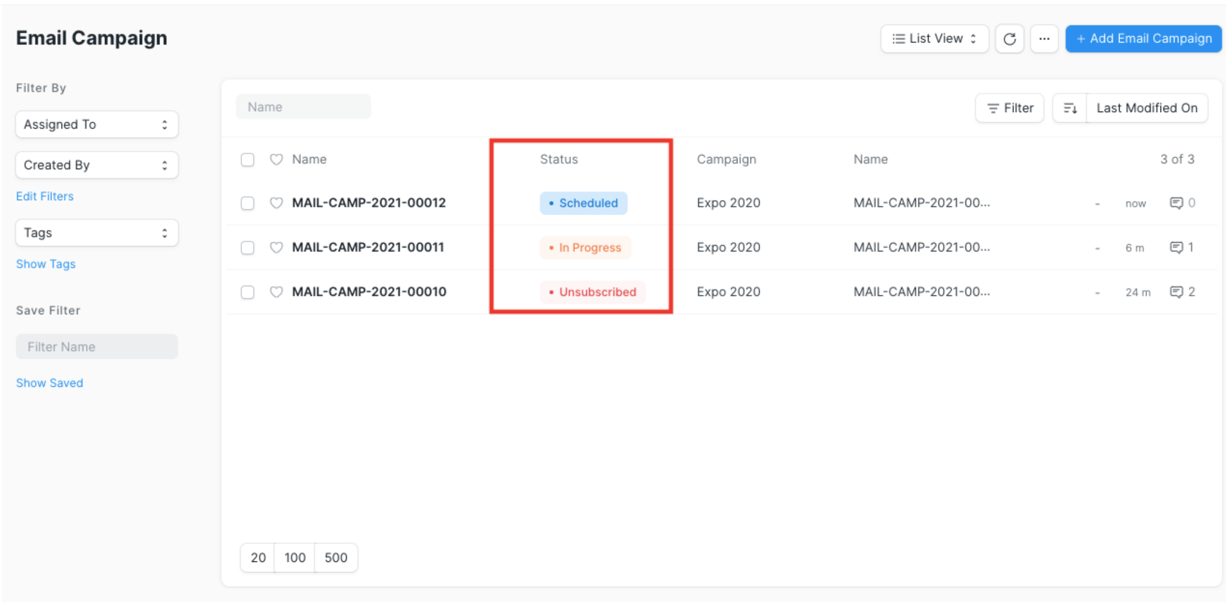
Then the emails sent would look like this:



3.4 Status indication

Status indicates the state of the Email Campaign, the various Statuses are:

- **Scheduled**: When the Email Campaign has not yet started but scheduled on a future 'Start Date'.
- **In Progress**: The campaign would be marked as 'In Progress' between 'Start Date' and 'End Date' of the campaign.
- **Completed**: After the 'End Date' of the campaign, the status will be changed to 'Completed'.
- **Unsubscribed**: When the Lead or Contact unsubscribes from the Campaign.



Email Group

An Email Group is a list of subscriber email IDs to which you send newsletters.

You can manage subscribers by grouping them into different groups.

You can group existing and potential customers into different groups based on their territory or products they are interested in. You can group the email ID of all employees so that you can share information with them.

To access the Email Group list, go to:

```
Home > Settings > Email > Email Group
```

1. How to Create an Email Group

1. Go to the Email Group list and click on New.
2. Enter 'Title'.

3. Click on 'Save'
4. Click on Action > Add Subscribers.
5. Enter Email Addresses.
6. Click on 'Add'

2. Features

2.1 Import Email IDs from Transactions

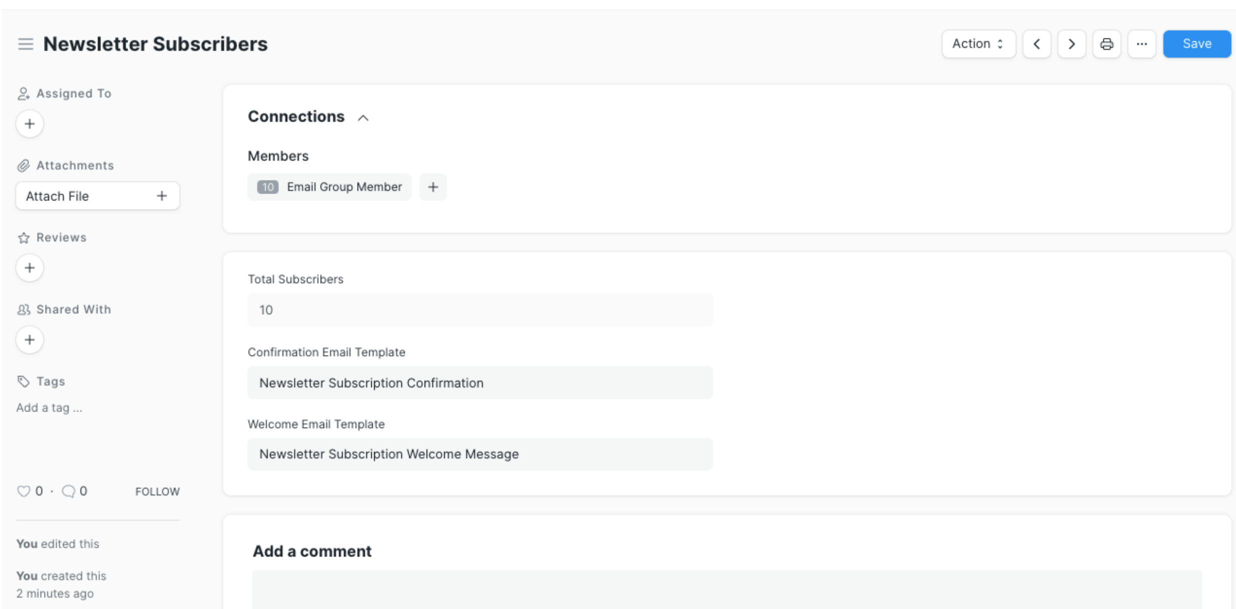
You can import email IDs from existing transactions.

Click on Action > Import Subscribers and select a transaction like Lead. Click on Import and all the email IDs mentioned in the email IDs will be imported.

2.2 Email Templates

You can specify the confirmation email and welcome email template for the email group. A confirmation email will be sent to confirm a person's subscription to your newsletter. The welcome email is sent when the person confirms their subscription to your email newsletter.

Confirmation Email Template: This email template is used to replace the default template sent for newsletter subscription. The confirmation email generated via this template is sent when someone subscribes to the Email Group Website. **Welcome Email Template:** Whenever a subscriber is added to an email group after confirmation, the email template set here will be sent to them.



Sales Pipeline

The sales pipeline in DellSuite CRM is a structured process that manages and tracks every stage of the sales cycle. It starts with lead generation and moves through different stages the cycle to deal closure. Each stage in the pipeline is managed and monitored in the system using activity tracking, communication logs, appointment management, contract generation etc.

With the help of effective management of sales pipeline, organisations to streamline their sales processes, improve conversion rates, and enhance customer relationships.

Lead

A lead is a potential customer who might be interested in your products or services.

To get the customer through the door, you may be doing all or any of the following:

- Listing your product on directories.
- Maintaining an updated and searchable website.
- Meeting people at trade events.
- Advertising your products or services.

When you send out the word that you are around and have something valuable to offer, people will come in to check out your products. These are your Leads.

They are called Leads because they may lead you to a sale. Sales executives usually work on leads by calling them, building a relationship and sending information about products or services. It is important to track all this conversation to enable another person who may have to follow-up on that contact. The new person is then able to know the history of that particular Lead.

To access the Lead list, go to:

```
Home > CRM > Sales Pipeline > Lead
```

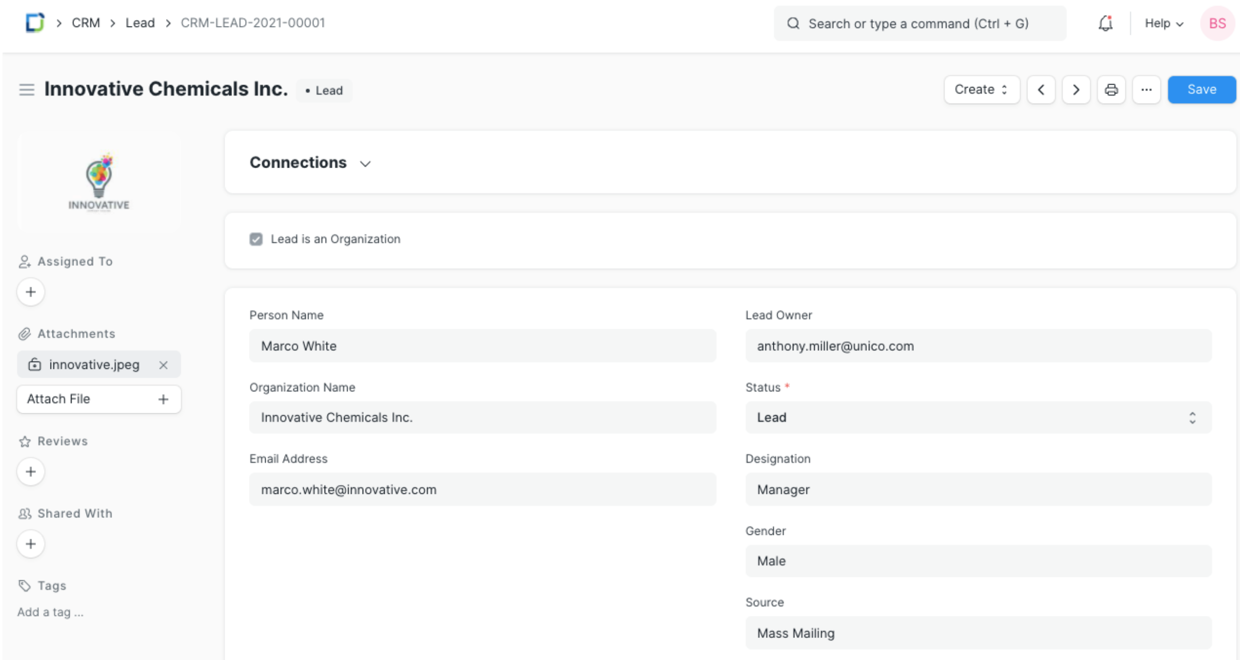
---

1. How to Create a Lead

1. Go to the Lead list and click on New.

2. If the person represents an organization, check the 'Lead is an Organization' checkbox. Notice that when you check, the 'Company Name ' field becomes mandatory. Enter the Company Name.
3. If the person is an individual, leave the checkbox unchecked and enter Person Name and Gender.
4. Enter the 'Email Address'.

5. **Status is the important field** in the Lead. You can set the status manually and also it will be updated automatically based on your actions against the lead.
    - Lead: This is the default status assigned when a Lead is created and it indicates an action is needed against this Lead.
    - Open: Sales executive needs to contact the Lead.
    - Replied: A sales executive has provided the information needed and response from Lead is awaited.
    - Opportunity: If an Opportunity is created against the Lead, the status is set to Opportunity. It indicates that the Lead is qualified and may lead to sales.
    - Quotation: If a quotation is created against a Lead, then the status is set to Quotation.
    - Lost Quotation: If the quotation given to the lead has been marked as lost, then the status is set to 'Lost Quotation'.
    - Interested: The lead is interested in the products or services.
    - Converted: If the quotation given to the Lead has resulted in confirmation of an order and if the Sales Order has been created against the quotation, then the status is set to Converted.
    - Do Not Contact: Lead is not interested and no further communication is needed.
6. You can set the Lead Source in Source field.
7. Enter email ID for communication.
8. Click on 'Save'.



You can also record the details of the conversation in the NOTES section.

Further details like Lead Type, Market Segment, Industry can be added in the 'MORE INFORMATION' section.

If you have a healthy number of leads, all this information will help you prioritize the leads you can pursue.

You can assign the Lead to a user by clicking on 'Assign' button on left bar. You can also attach files/images by clicking on 'Attach File' button.

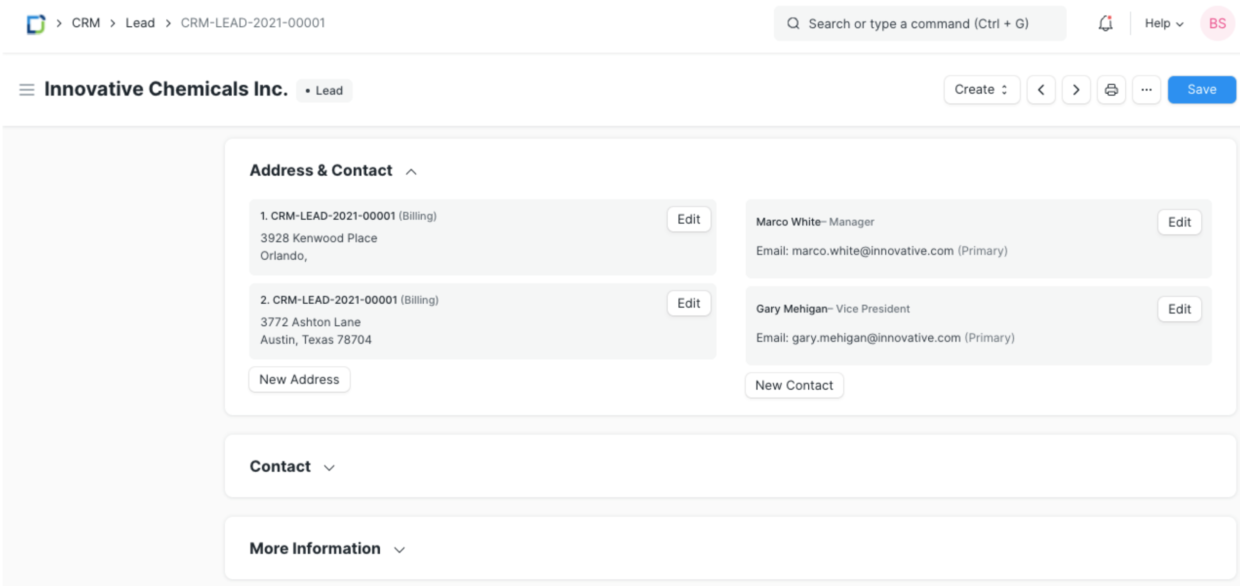
2. Features

2.1 Reminders to Follow Up on the Leads

It is important to reach out to leads from time to time and build the relationship. You can create a calendar event from the **Activities** tab for the user and a notification will be shown on that date.

2.2 Adding Multiple Contacts and Addresses

In Busines-to-business(B2B) scenario, in order to close a sales deal, you will have to contact multiple people working in the prospective company. You can add the details of all such people in the same lead. Once you save a Lead, you will get the option to add Contact details by clicking on 'New Contact' button. Similarly, you can add the Address details by clicking on 'New Address'.



2.3 Recording Comments, Emails and Events

- **Comments**: You can write your comment in 'Add a comment' box and click on 'Comment'.
- **Emails**: You can send an email to the lead by clicking on the 'New Email' button and when the lead responds to your email, it will be appended to your email creating an email thread.
- **Events**: You can also records the Meetings, Calls etc you have had with the Lead by clicking on 'New Event'

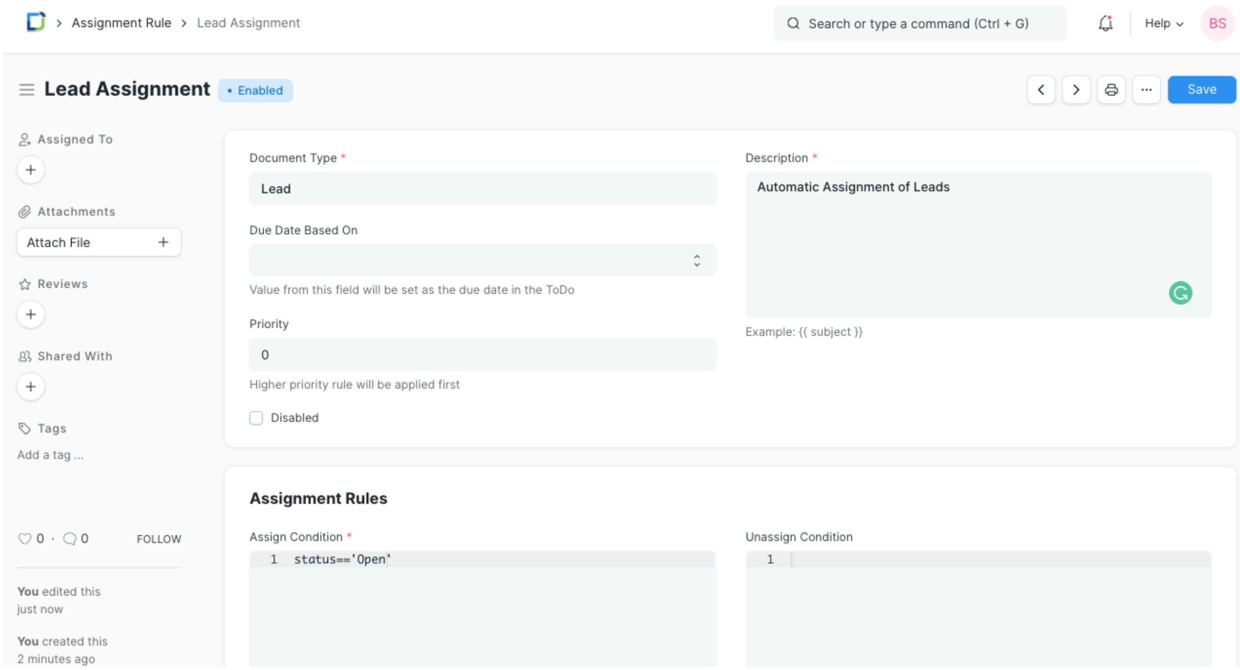
2.4 Creating Opportunity, Customer and Quotation

You can create an Opportunity, Customer or a Quotation from the Make dropdown. Relevant field values will be copied over.

2.5 Auto-assigning the Leads to Sales Executives

Introduced in Version 12

You can define Assignment Rules to automatically assign the leads to sales executives.



3. Adding Custom Fields

You may need to add custom fields to capture additional details as per your needs.

You can customize the Lead DocType using Customize Form tool.

Opportunity

Opportunity is a qualified lead.

When you get a hint that lead is looking for a product/service that you offer, you can convert that lead into an opportunity. You can also create an opportunity against an existing customer. Multiple Opportunities can be collected against a lead or a customer.

To access the Opportunity list, go to:

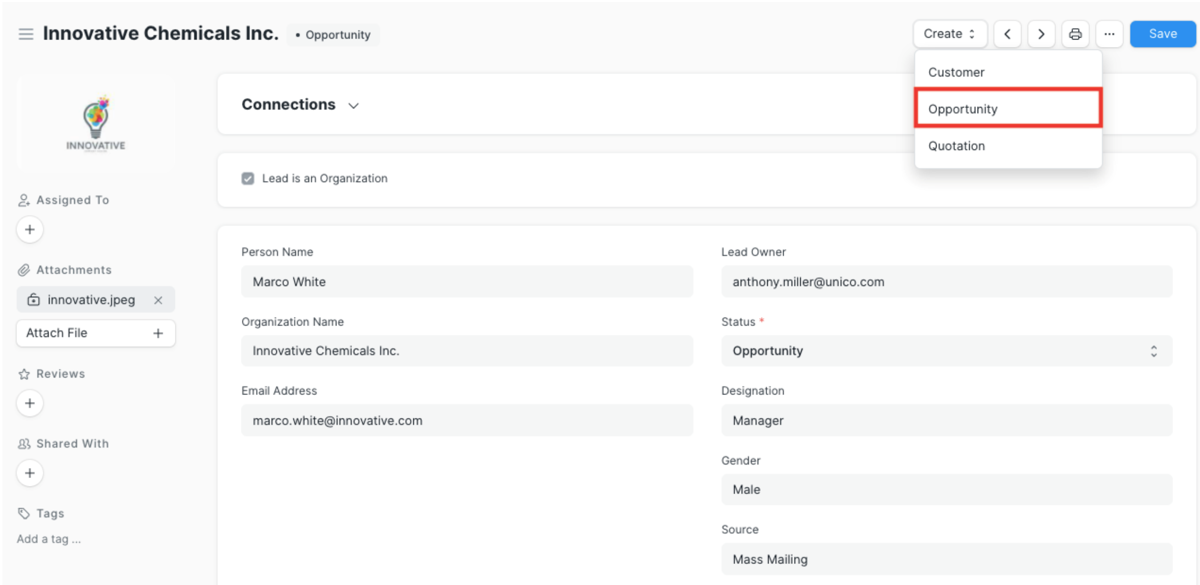
```
Home > CRM > Sales Pipeline > Opportunity
```

1. How to Create an Opportunity

1. Go to the Opportunity list and click on 'Add Opportunity'.

2. In 'Opportunity From', select Lead if opportunity is from a lead.

3. You can also go to a Lead with 'Open' status and select “Opportunity” under **Create** dropdown as shown below.

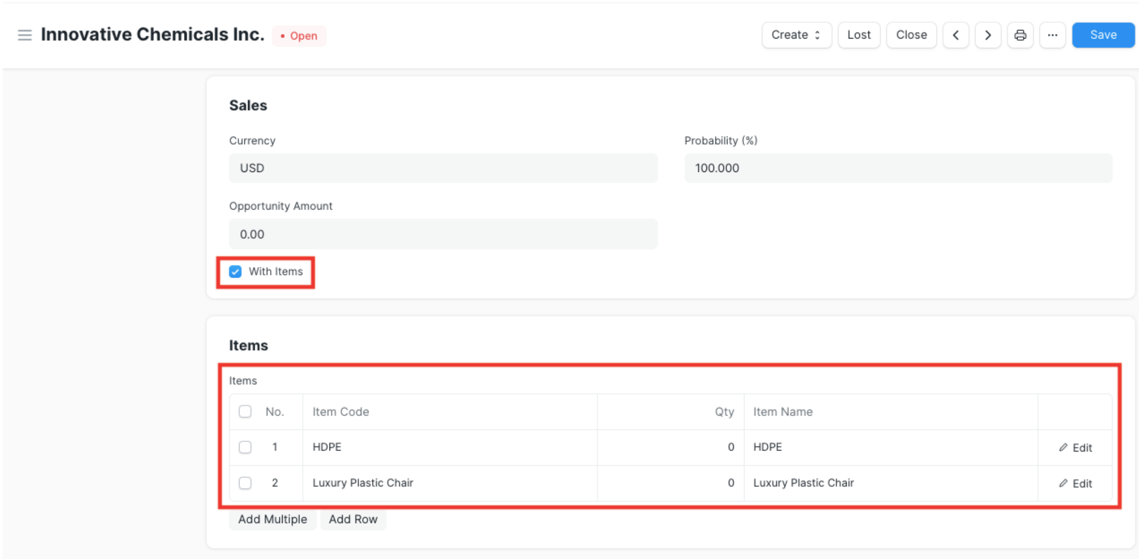


4. In 'Opportunity From', select Customer if opportunity is from a customer.

5. Select Opportunity Type. This indicates the broad category of opportunity like Sales, Support, Maintenance etc.

6. You can add more details like Opportunity Amount, Probability (of conversion), Currency in 'SALES' section.

7. You can capture the details of the products/services needed by clicking on 'With Items' checkbox and adding the item and quantity details in 'Items' section.



8. Enter the Source of the opportunity in the SOURCE section.

2. Features

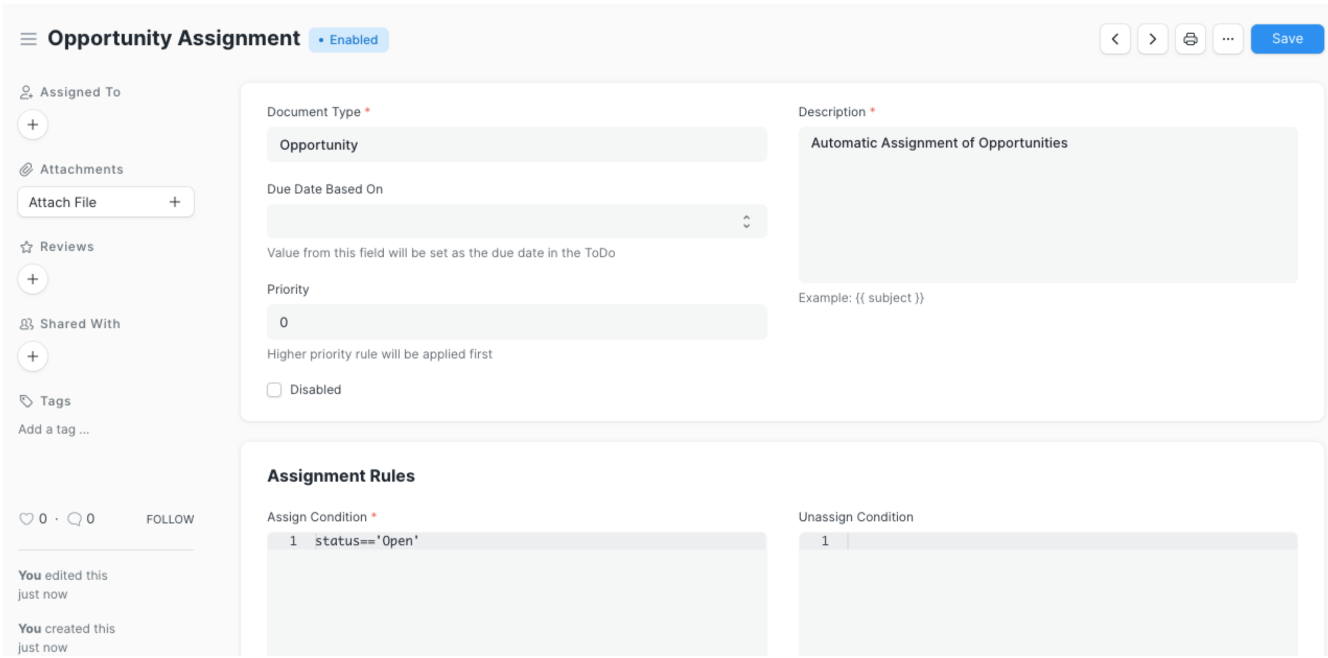
2.1 Reminders to Follow Up on Opportunities

It is important to reach out to opportunities from time to time and build the relationship. You can set the 'Next Contact Date' and 'Next Contact By' fields and a calendar event will be added for the user chosen in 'Next Contact By' field and a notification is shown on the that Date.

2.2 Auto-assign Opportunities to Sales Executives

Introduced in Version 12

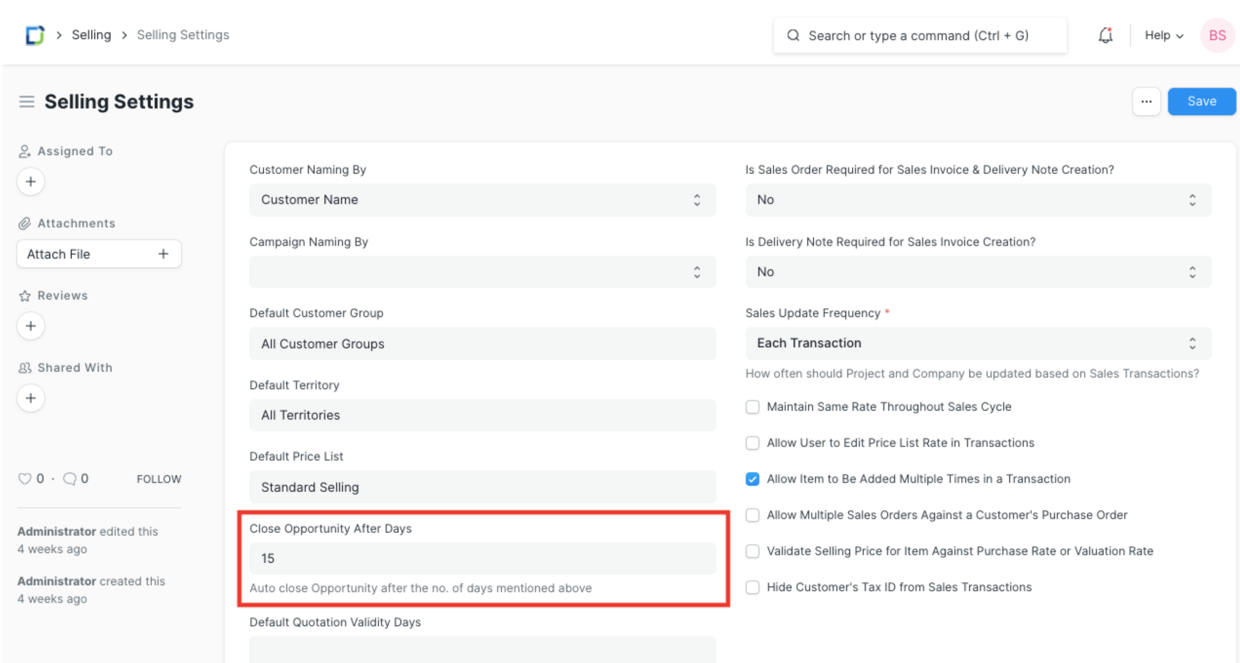
You can define Assignment Rules to automatically assign the opportunities to sales executives.



2.3 Auto-close Opportunities

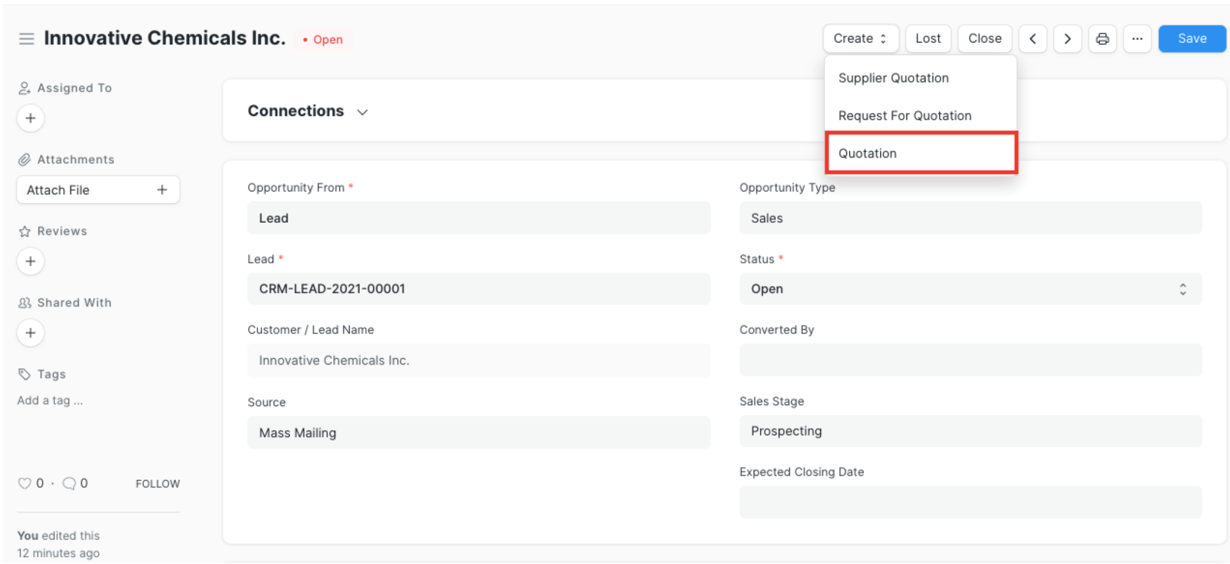
If you do not receive a response from an opportunity for a certain number of days, you may want that opportunity to be closed automatically.

You can set the number of days in Selling Settings.



2.4 Create a Quotation

You can create a Quotation from the **Make** dropdown. Relevant field values will be copied over.



2.5 Create a Supplier Quotation

You may need to get a quotation from your supplier against the customer requirement and based on that, prepare the quotation for your customer. With DellSuite, you can make a Supplier Quotation from the opportunity itself.

Best Practice: Leads and Opportunities are often referred as your "Sales Pipeline" this is what you need to track if you want to be able to predict how much business you are going to get in the future. Its always a good idea to be able to track what is coming in order to adjust your resources.

2.6 Capture the Reasons and Competitors for Lost Opportunities

When an opportunity is lost, you can capture the reasons, competitors and detail reason for losing. This will help you to analyse the trends over a long period of time and identify the insights needed for improvements at various areas in the organisation.

2.7 Minutes to First Response

When you send the first reply(email) to an Opportunity, it calculates Mins to First Response and is displayed in a field.

A report is generated called 'Minutes to First Response for Opportunity'. Read CRM Reports for more details.

Appointment

An appointment is a prearranged meeting between a Lead and an Employee of your Company.

Appointment document type can be used to schedule and manage interaction with a Lead or an Opportunity.

To access Appointment list, go to:

```
Home > CRM > Sales Pipeline > Appointment
```

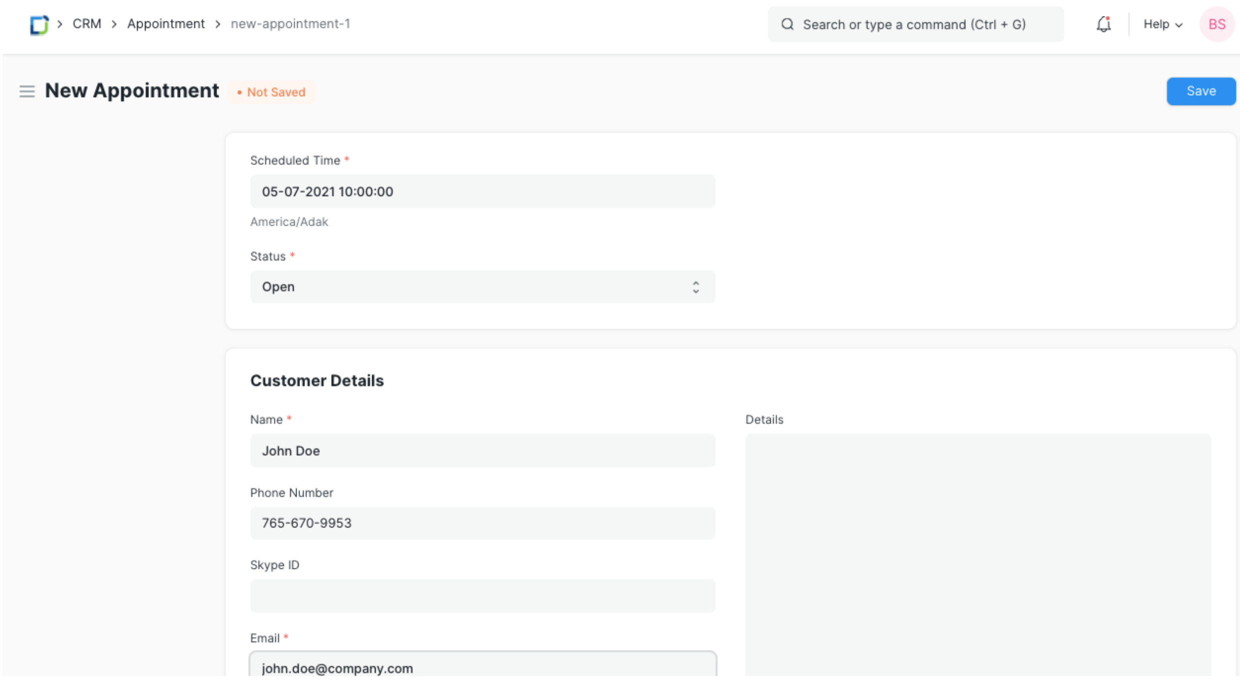
1. Prerequisites

1. Appointment Booking Settings
2. Holiday List
3. Employee
4. Lead
5. Email

2. How to create an Appointment

1. Go to Appointment list, click on New
2. Select scheduled time of the appointment
3. Enter customer details
4. In linked documents, if you have already created a Lead for the Customer you can set it here. Otherwise the system will automatically create a new lead with the customer details from previous step.

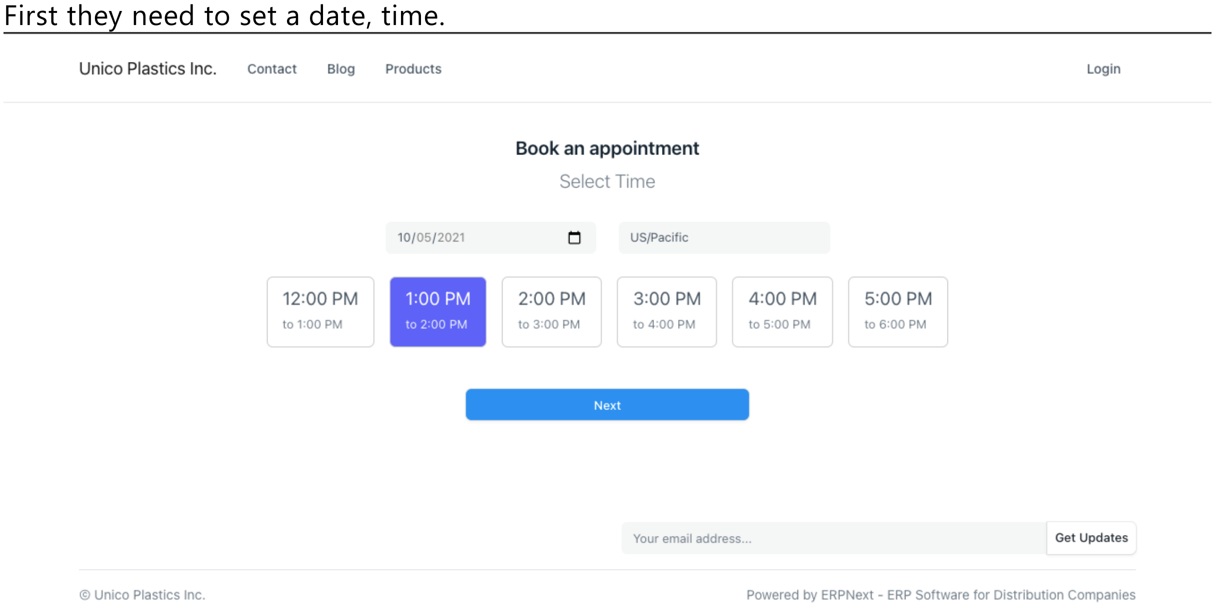
5. Save.



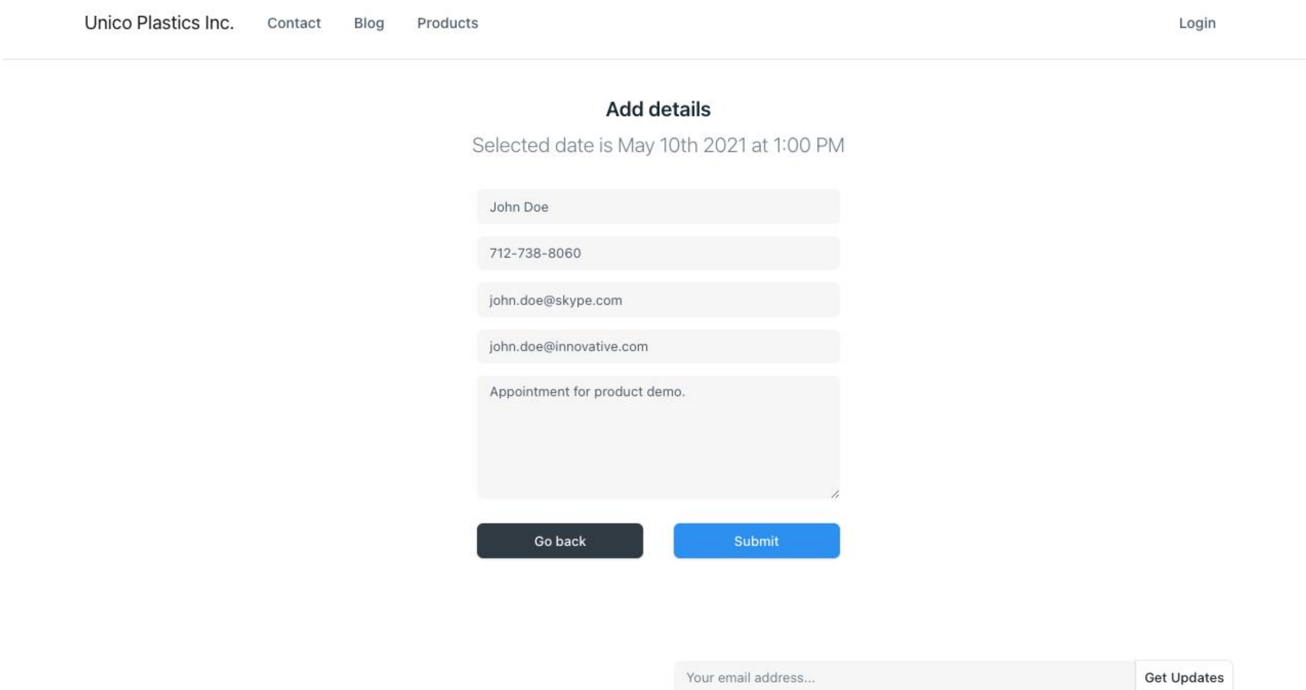
2.1 Creating appointments via website

Your Customers/Leads can create appointment using the webpage `yoursitename.com/book_appointment`.

First they need to set a date, time.



Then, add more details:



It'll match the customer email with leads in the system and if one is found, it is linked with the document. If no lead is found, the appointment is marked as "Unverified" and an email is sent to the customer to confirm their email

3. Features

3.1 Autoassign

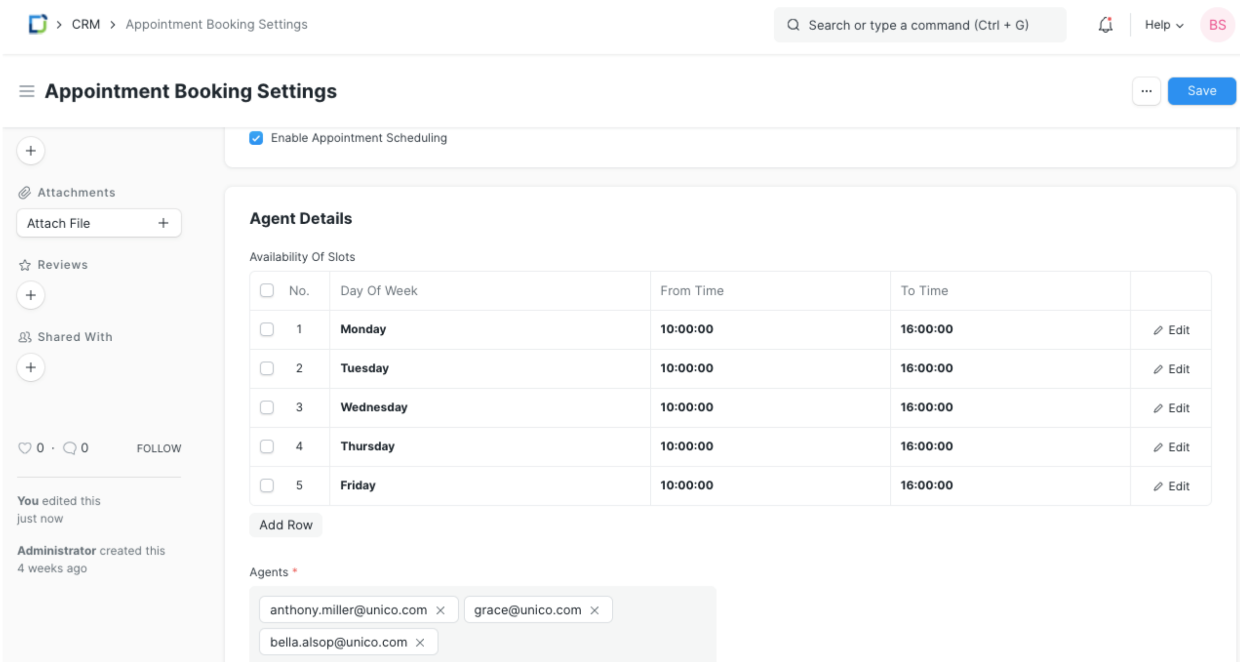
Appointments are automatically assigned to employees as per the `Agents` list in Appointment Booking Settings. The agent with the least number of assignments for the day of the appointment and who is free in the scheduled time is assigned to the appointment.

3.2 Email confirmation

If there is no matching lead in your system, an email will be sent to the email address in the appointment to confirm if the email address is valid. Upon confirmation, a new Lead will also be created in the system along with the Appointment.

Appointment Booking Settings

You can find all settings related to booking appointments in Appointment Booking Settings.



1. Enable Appointment scheduling

This checkbox will enable appointment scheduling and also enable the `/book_appointment` Route for website users (your customers). Your customers will see a portal view. To know more, visit the Appointment Page

2. Agent Details

In this section, you can add details about agents, such as their working hours and holidays.

2.1 Availability of Slots

Here you can set the timing in which your agents are available to attend an appointment. This is set per day of the week. Each row represents a continuous block of time, you can have multiple entries for each day of the week.

For example if your agents work Monday to Friday, 9am to 5pm but with a lunch break at 1.30 for half and hour. You will need to create two entries for each day. One from 9am to 1.30pm and another from 2pm to 5pm.

2.2 Agents

This is the list of agents which will be **autoassigned** to appointments. The number of appointments which can exist in one timeslot also depends upon the number employees in this list.

2.3 Holiday list

You can link a (holiday list)[https://DellSuite.com/docs/v13/user/manual/en/human-resources/holiday-list] here to apply to the appointment schedule. If the day is a holiday, scheduling an appointment on that day won't be allowed.

3. Appointment Details

This section contains details about the appointment themselves.

3.1 Appointment Duration in minutes

The duration of appointment in minutes. This is used to calculate appointment timeslots for the web portal. Changing this does not affect the appointments created before the change.

3.2 Notify Via Email

Enabling this checkbox will send an email to the participants of the appointments i.e. your employee and the customer on the day of the appointment. Changing this checkbox does not affect the appointments created before the change.

3.3 Number of days appointment can be books in advance

This is the number of days the appointment can be booked in advance. If the Holiday List provided above ends before the date calculated using this number, appointment scheduling will be stopped at the end of holiday list end.

4. Success settings

4.1 Success Redirect URL

This is the URL where the user will be redirected on creation of successful appointment creation via Web Portal. This redirect will not occur when creating appointments from within Desk UI. Leave blank for home. This is relative to site URL, for example "about" will redirect to "https://yoursitename.com/about"

Contract

A contract is a legally binding agreement between a Supplier and a Customer over the sale or products or services.

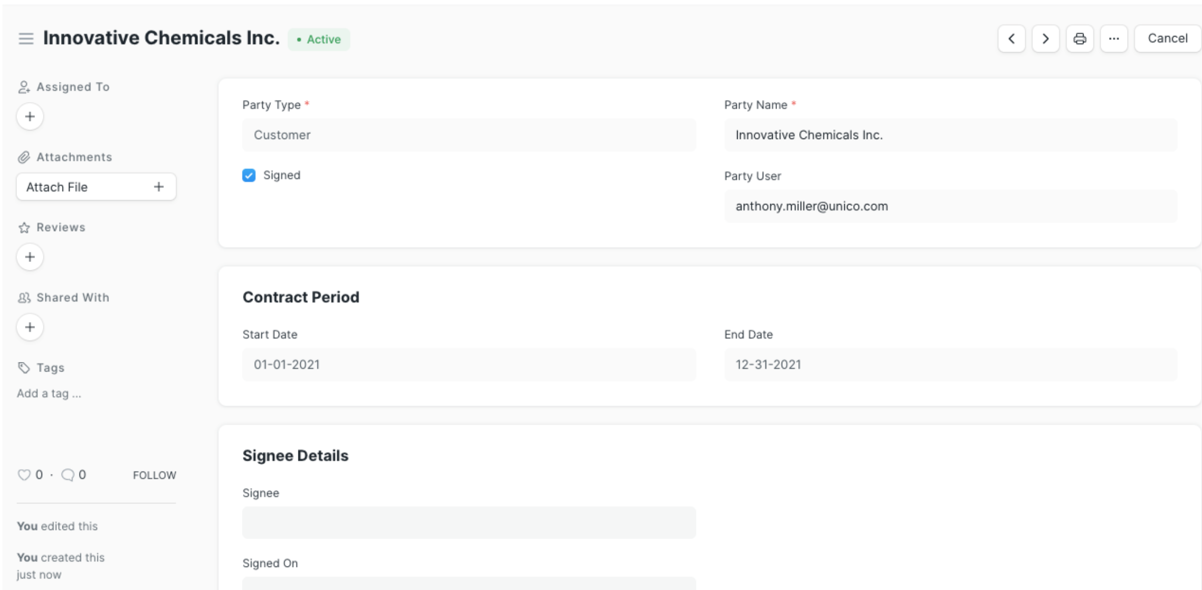
A contract is legally enforceable because it meets the requirements and approval of the law. An agreement typically involves the exchange of goods, services, money, or promises of any of those.

To access the Contract list, go to:

Home > Sales Pipeline > Contract

1. How to Create a Contract

1. Go to the Contract list and click on New.
2. Choose the Customer.
3. Enter the Contract Terms. A template can also be created for easily fetching the terms.
4. Save.



Party User: The employee from your Company who is in contact with the Customer.

1.1 Statuses

- **Unsigned**: The Contract has not yet been signed by the Customer.
- **Active**: The Contract has been signed and is active under the Contract Period.
- **Inactive**: The Contract is out of the Contract Period and not valid anymore.

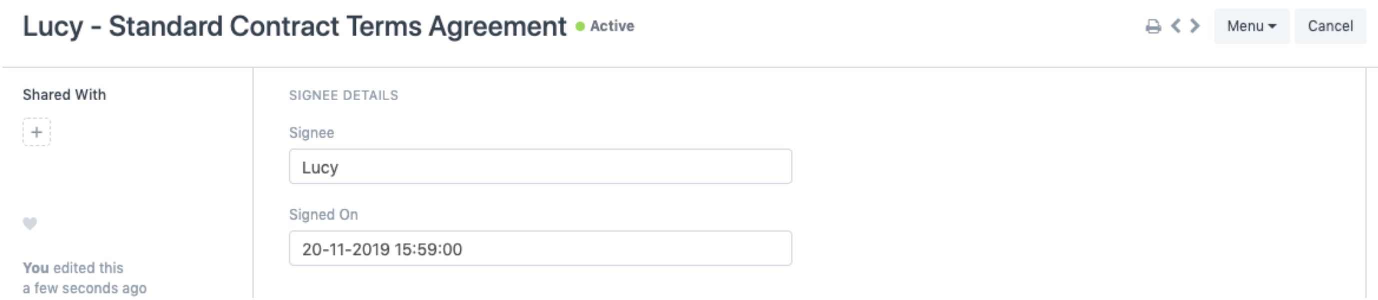
2. Features

2.1 Contract Period

The Start and End date within which the Contract is valid.

2.2 Signee Details

This section will appear when the 'Signed' checkbox is ticked to indicate that the Customer has signed and accepted the Contract.



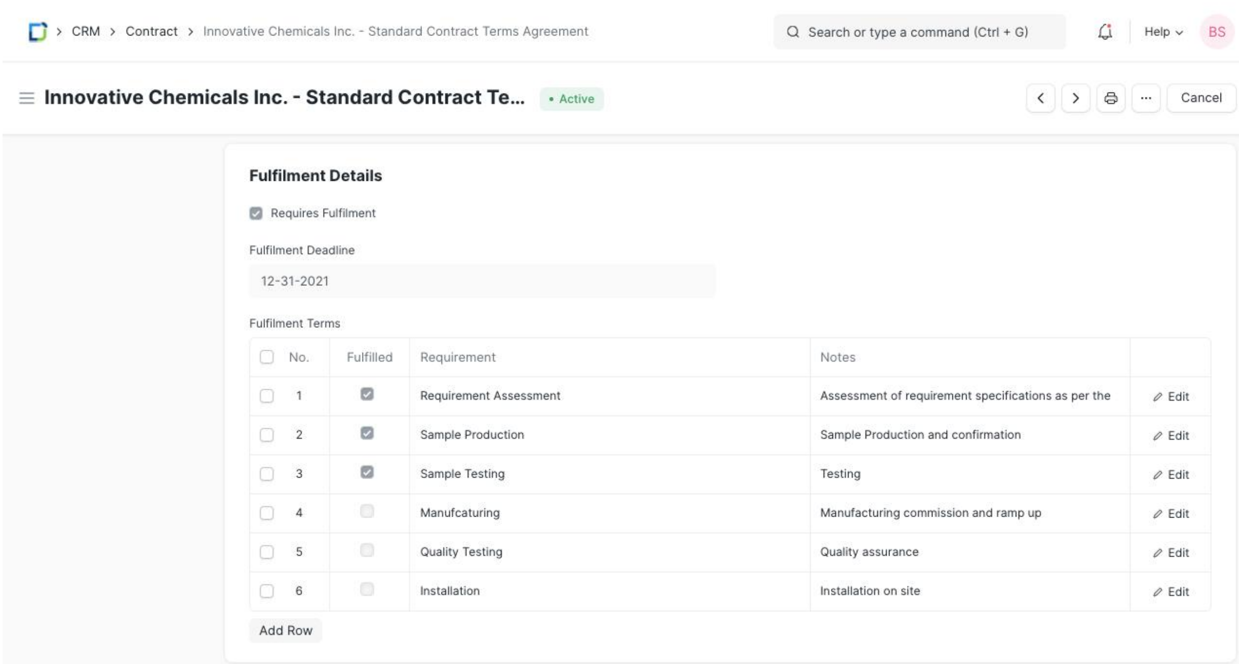
- **Signee**: Enter the name of the person that has signed the Contract.
- **Signed On**: The date on which the Contract was signed.

2.3 Contract Details

Enter the terms of the Contract in the Contract Terms field. You can create a Contract Template and the template can be selected to fetch the Contract Terms.

2.4 Fulfilment Details

If the Contract requires some fulfilment from the Supplier's (your) end, their details can be recorded in the Fulfilment Terms table.



- **Requirement**: Enter a requirement that needs to be fulfiled. For example, 'installation'.
- **Notes**: Any notes about the requirement can be entered here.

2.5 Contract Template

A contract template is a standardized outline of a contract without the specifics involved. You can create a new template by going to:

```
Home > CRM > Contract Template
```

You can create templates by using Jinja. Eg:

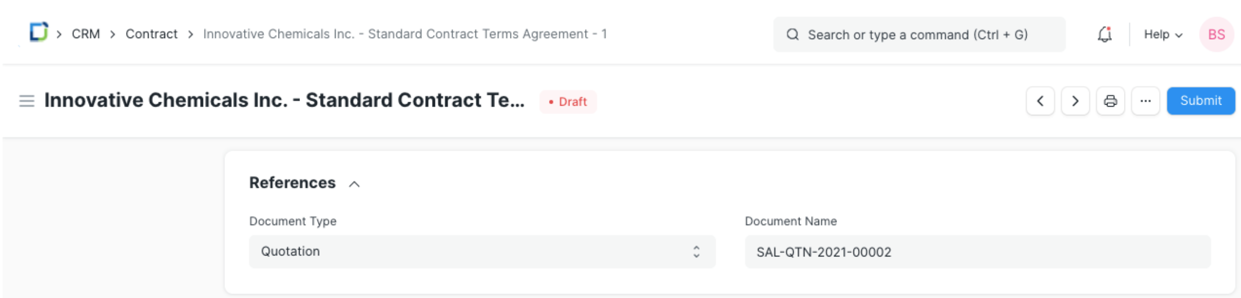
The parties enter into this contract on {{ start_date }}.

When you create a new contract using this template, the `{{ start_date }}` is replaced by the date entered into the field of the same name.

2.6 References

If the Contract can be linked to a transaction in DellSuite. Select the transaction type and the specific transaction. The documents that can be linked are:

- Quotation
- Project
- Sales Order
- Purchase Order
- Sales Invoice
- Purchase Invoice



CRM Reports

CRM reports in DellSuite offer valuable insights into lead management. They help businesses track key metrics, evaluate the success of various campaigns, and understand customer behaviour.

By analyzing these reports, companies can make informed decisions, streamline their sales processes, and enhance customer relationships, leading to improved overall efficiency and growth.

Home > CRM > Reports

1. Lead Details

It typically provides an overview of the leads you are managing, including key details and metrics related to lead status, source, conversion, and more.

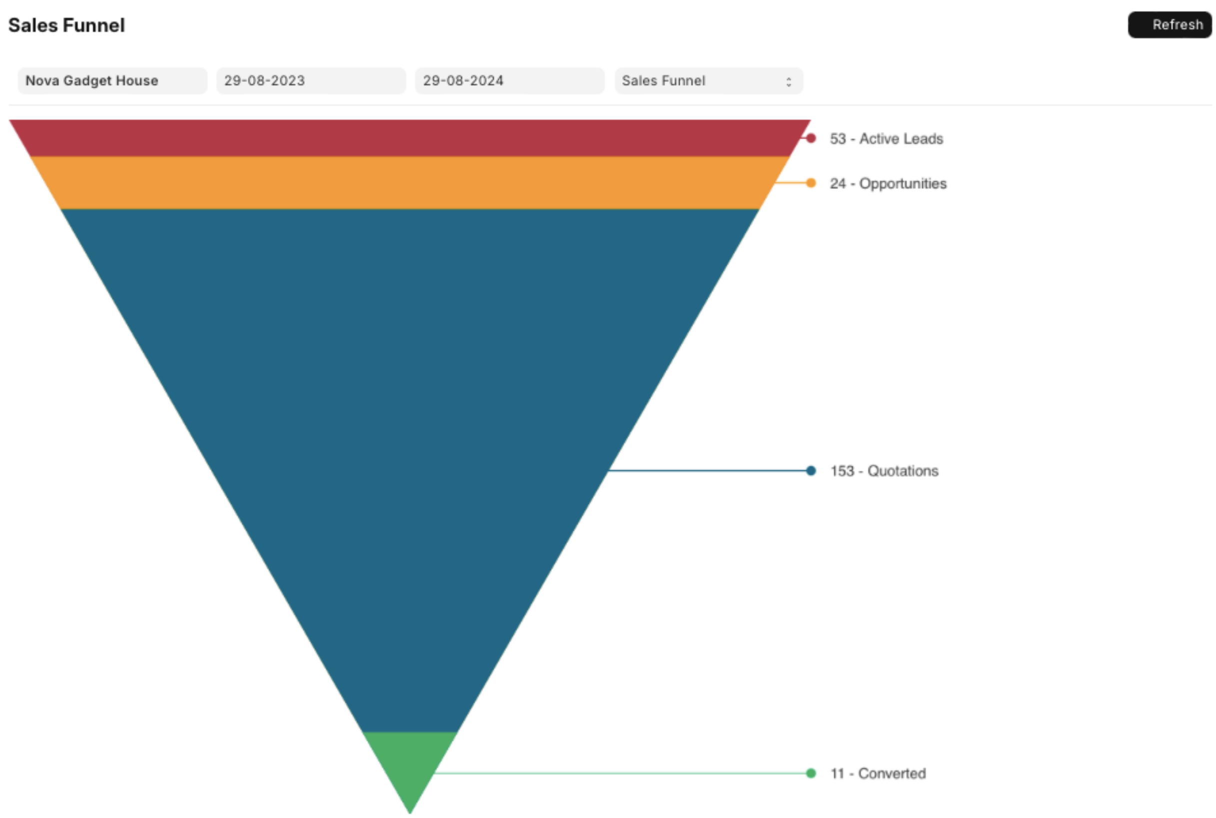
Nova Gadget House | 29-08-2023 | 29-08-2024 | Status | Territory

	Lead	Lead Name	Status	Lead Owner	Source	Territory	Mobile	Phone
2	CRM-LEAD-2023...	Robert Johnson	Quotation	pushkar@erpnext.com	Email Campaign	All Territori...	+33 1 23 45 ...	+33 1 23 45 ...
3	CRM-LEAD-2023...	Susan Brown	Converted	pushkar@erpnext.com	Trade Show	All Territori...	+49 123 45 ...	+49 123 45 ...
4	CRM-LEAD-2023...	David Wilson	Lead	pushkar@erpnext.com	LinkedIn	All Territori...	+61 2 9876 ...	+61 2 9876 ...
5	CRM-LEAD-2023...	Lisa Anderson	Opportunity	pushkar@erpnext.com	Facebook	All Territori...	+81 3 1234 ...	+81 3 1234 ...
6	CRM-LEAD-2023...	Michael Lee	Opportunity	pushkar@erpnext.com	Website	All Territori...	+86 10 1234...	+86 10 1234...
7	CRM-LEAD-2023...	Sarah White	Opportunity	pushkar@erpnext.com	Trade Show	All Territori...	+91 22 9876...	+91 22 9876...
8	CRM-LEAD-2023...	William Davis	Opportunity	pushkar@erpnext.com	Referral	All Territori...	+7 495 123-...	+7 495 123-...
9	CRM-LEAD-2023...	Emily Clark	Opportunity	pushkar@erpnext.com	LinkedIn	All Territori...	+55 11 9876...	+55 11 9876...
10	CRM-LEAD-2023...	James Taylor	Opportunity	pushkar@erpnext.com	Email Campaign	All Territori...	+1 234-567...	+1 234-567...
11	CRM-LEAD-2023...	Michelle Brown	Lead	pushkar@erpnext.com	Website	All Territori...	+44 20 5678...	+44 20 5678...
12	CRM-LEAD-2023...	Christopher Hall	Opportunity	pushkar@erpnext.com	Trade Show	All Territori...	+33 1 45 67 ...	+33 1 45 67 ...
13	CRM-LEAD-2023...	Karen Harris	Opportunity	pushkar@erpnext.com	LinkedIn	All Territori...	+49 1234 56...	+49 1234 56...
14	CRM-LEAD-2023...	Thomas Martinez	Lead	pushkar@erpnext.com	Email Campaign	All Territori...	+61 3 9876 ...	+61 3 9876 ...
15	CRM-LEAD-2023...	Laura Turner	Opportunity	pushkar@erpnext.com	Referral	All Territori...	+81 90-123...	+81 90-123...
16	CRM-LEAD-2023...	Richard Scott	Lead	pushkar@erpnext.com	Trade Show	All Territori...	+86 21 9876...	+86 21 9876...
17	CRM-LEAD-2023...	Julie Wilson	Quotation	pushkar@erpnext.com	LinkedIn	All Territori...	+91 44 1234...	+91 44 1234...
18	CRM-LEAD-2023...	Daniel Adams	Quotation	pushkar@erpnext.com	Email Campaign	All Territori...	+7 495 987-...	+7 495 987-...

2. Sales Funnel

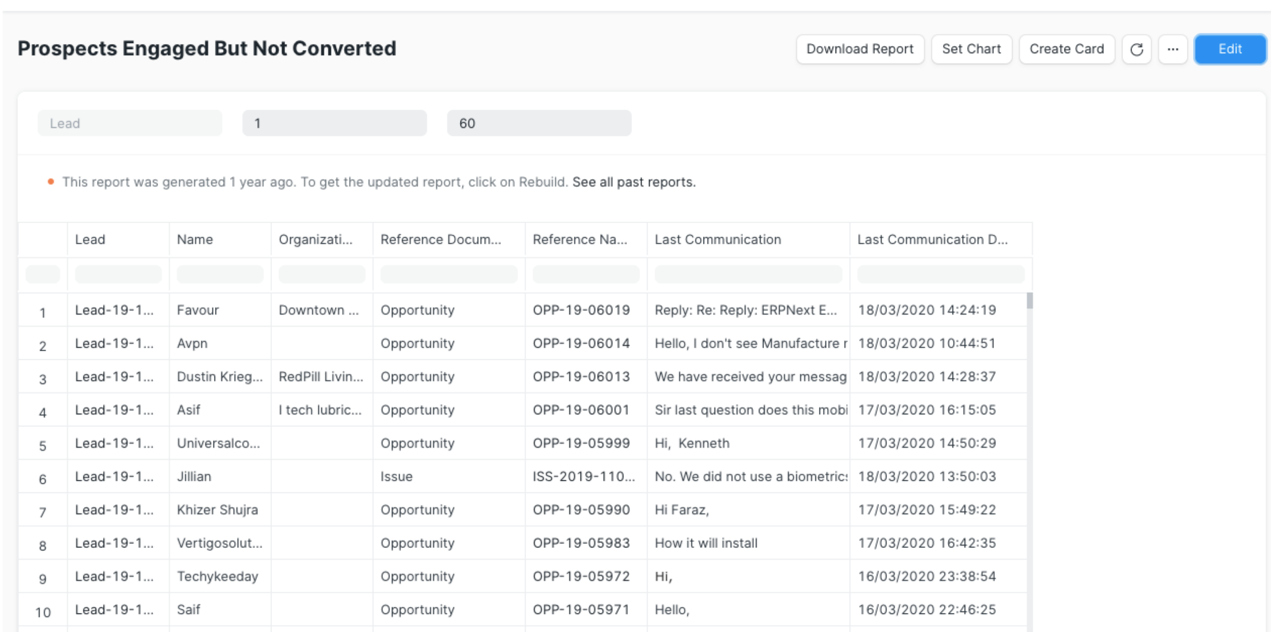
The Sales Funnel Report provides a visual and analytical view of your sales pipeline, helping you understand the status and progression of leads and opportunities through various stages of your sales process.

For more details check Sales Funnel.



3. Prospects Engaged But Not Converted

It helps you identify and analyze leads or opportunities that were engaged but did not result in a conversion.



	Lead	Name	Organizati...	Reference Docum...	Reference Na...	Last Communication	Last Communication D...
1	Lead-19-1...	Favour	Downtown ...	Opportunity	OPP-19-06019	Reply: Re: Reply: ERPNext E...	18/03/2020 14:24:19
2	Lead-19-1...	Avpn		Opportunity	OPP-19-06014	Hello, I don't see Manufacture r	18/03/2020 10:44:51
3	Lead-19-1...	Dustin Krieg...	RedPill Livin...	Opportunity	OPP-19-06013	We have received your messag	18/03/2020 14:28:37
4	Lead-19-1...	Asif	I tech lubric...	Opportunity	OPP-19-06001	Sir last question does this mobi	17/03/2020 16:15:05
5	Lead-19-1...	Universalco...		Opportunity	OPP-19-05999	Hi, Kenneth	17/03/2020 14:50:29
6	Lead-19-1...	Jillian		Issue	ISS-2019-110...	No. We did not use a biometric:	18/03/2020 13:50:03
7	Lead-19-1...	Khizer Shujra		Opportunity	OPP-19-05990	Hi Faraz,	17/03/2020 15:49:22
8	Lead-19-1...	Vertigosolut...		Opportunity	OPP-19-05983	How it will install	17/03/2020 16:42:35
9	Lead-19-1...	Techykeeday		Opportunity	OPP-19-05972	Hi,	16/03/2020 23:38:54
10	Lead-19-1...	Saif		Opportunity	OPP-19-05971	Hello,	16/03/2020 22:46:25
11	Lead-19-1	Antondelab		Opportunity	OPP-19-05956	Hello	16/03/2020 19:23:40

4. Minutes to First Response for Opportunity

In this internet era, we all expect a quicker response time to any of our queries. This report gives you the details about time taken by sales executives for response to an opportunity. Lesser the average time for first response the better.

You can input the date range for which you would like to analyse the minutes to first response. The line graph is shown on the top and date wise details at the bottom.

5. Inactive Customers

This report shows the list of customers who have not purchased since specific number of days. You can mention the number of days in 'Days Since Last Order' filter. Also you can mention if Sales Order or Sales Invoice is to be considered in DocType filter.

Inactive Customers

Actions

30 | Sales Order

	Customer	Customer N...	Territory	Customer Gr...	Number of ...	Total Order ...	Total Order Consid...	Last Order Amount	Last Order Date
1	Acme Industri...	Acme Industri...	All Territories	Corporate	5	₹ 14,34,980.00	₹ 14,34,980.00	₹ 6,60,000.00	12-07-2024
2	Amata Lavell	Amata Lavell	All Territories	Individual	1	₹ 3,30,000.00	₹ 3,30,000.00	₹ 3,30,000.00	19-06-2023
3	Amit Kumar	Amit Kumar	All Territories	Non Profit	1	₹ 6,60,000.00	₹ 6,60,000.00	₹ 6,60,000.00	30-09-2023
4	Apex Innovati...	Apex Innovati...	All Territories	Individual	1	₹ 10,35,983.00	₹ 10,35,983.00	₹ 10,35,983.00	01-02-2023
5	Bright Ideas L...	Bright Ideas L...	All Territories	Corporate	1	₹ 8,09,973.00	₹ 8,09,973.00	₹ 8,09,973.00	15-06-2023
6	Caren Algate	Caren Algate	All Territories	Commercial	4	₹ 14,09,980.00	₹ 14,09,980.00	₹ 99,990.00	26-07-2024
7	Clara Menezes	Clara Menezes	All Territories	Individual	2	₹ 8,44,988.02	₹ 8,44,988.02	₹ 5,49,998.56	25-10-2023
8	Cyndia O'Ske...	Cyndia O'Ske...	All Territories	Non Profit	1	₹ 8,69,995.00	₹ 8,69,995.00	₹ 8,69,995.00	12-09-2023
9	EcoTech Solut...	EcoTech Solut...	All Territories	Corporate	1	₹ 1,59,920.00	₹ 1,59,920.00	₹ 1,59,920.00	22-08-2023
10	Elite Systems	Elite Systems	All Territories	Corporate	1	₹ 5,78,997.00	₹ 5,78,997.00	₹ 5,78,997.00	22-08-2023
11	FirstClass Corp.	FirstClass Corp.	All Territories	Government	1	₹ 4,64,988.00	₹ 4,64,988.00	₹ 4,64,988.00	30-06-2023
12	FutureTech La...	FutureTech La...	All Territories	Corporate	1	₹ 10,04,970.00	₹ 10,04,970.00	₹ 10,04,970.00	22-08-2023
13	Global Innovat...	Global Innovat...	All Territories	Individual	1	₹ 7,13,988.00	₹ 7,13,988.00	₹ 7,13,988.00	12-09-2023
14	Infinite Innova...	Infinite Innova...	All Territories	Commercial	13	₹ 65,73,817.00	₹ 65,73,817.00	₹ 2,04,992.00	19-10-2023
15	InnovaCorp	InnovaCorp	All Territories	Individual	17	₹ 96,51,710.00	₹ 96,51,710.00	₹ 6,02,982.00	09-11-2023
16	Ketaki Mehta	Ketaki Mehta	All Territories	Individual	2	₹ 11,48,960.35	₹ 11,48,960.35	₹ 5,84,002.15	06-06-2023
17	NexGen Ventu...	NexGen Ventu...	All Territories	Corporate	1	₹ 4,64,988.00	₹ 4,64,988.00	₹ 4,64,988.00	19-10-2023

7. Lost Opportunity

This report provides Lost Opportunity details like opportunity from, party, customer name, lost reasons, sales stage, territory, and other details.

Lost Opportunity

Create Card | Set Chart

Unico Plastics Inc. | 05-09-2020 | 05-09-2022 | Lost Reason | Territory | Opportunity From | Party | Next Contact By

	Opportunity	Opportunity Fr...	Party	Customer/Lead N...	Opportunity Ty...	Lost Reasons	Sales Stage	Territory
1	CRM-OPP-2021-00001	Lead	CRM-LEAD-2021-00...	Innovative Chemical...	Sales	Product - Requirement Gap	Prospecting	All Territories
2	CRM-OPP-2021-00002	Lead	CRM-LEAD-2021-00...	Massive Dynamic Inc.	Sales	Pricing	Prospecting	All Territories
3	CRM-OPP-2021-00003	Lead	CRM-LEAD-2021-00...	Globex Corporation	Sales	Lost to Competition	Prospecting	All Territories
4	CRM-OPP-2021-00004	Lead	CRM-LEAD-2021-00...	Soylent Corp	Sales	Pricing	Prospecting	All Territories
5	CRM-OPP-2021-00005	Lead	CRM-LEAD-2021-00...	Initech Inc.	Sales	Lost to Competition	Prospecting	All Territories

For comparison, use >5, <10 or =324. For ranges, use 5:10 (for values between 5 & 10). Execution Time: 0.002796 sec

8. Campaign Efficiency

This report evaluates the effectiveness of your marketing campaigns by analyzing various performance metrics. This report helps you understand how well your campaigns are performing, the return on investment (ROI), and areas where improvements can be made.

Campaign Efficiency

Actions

01-01-2023 | 31-08-2024

	Campaign Name	Lead Count	Opp Count	Quot Count	Order Count	Order Value	Opp/Lead %	Quot/Lead %	Order/Quot %
1	Website	6	5	40	15	1,06,21,699.00	83.333	666.667	37.500
2	Referral	5	3	11	0	0.000	60.000	220.000	0.000
3	Trade Show	5	1	207	13	80,29,782.000	20.000	4,140.000	6.280
4	Cold Call	5	3	7	1	8,09,973.000	60.000	140.000	14.286
5	Social Media	4	2	7	1	4,64,988.000	50.000	175.000	14.286

For comparison, use >5, <10 or =324. For ranges, use 5:10 (for values between 5 & 10). Execution Time: 0.014054 sec

CRM Settings

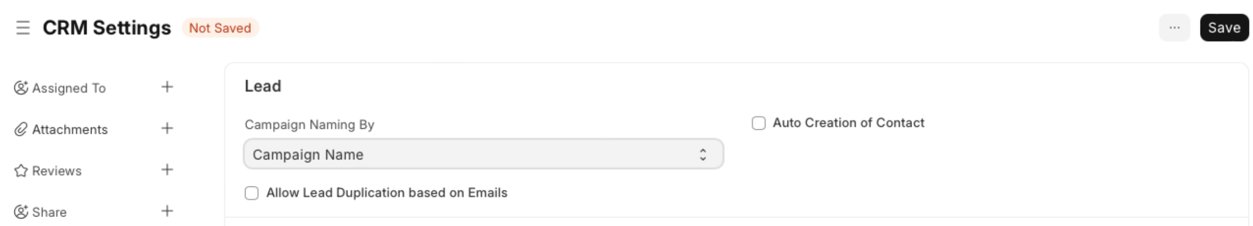
Introduced in Version 14.

CRM Settings allow you to configure your leads, opportunities, quotations and communication as per the business tules..

To access CRM Settings, go to:

Home > CRM > Settings > CRM Settings

Lead



1. Campaign Naming By

It ensures consistency in the naming convention used by the organisation by automatically generating names for new campaigns based on predefined rules or patterns. It helps users create and maintain unique campaigns and track their effectiveness.

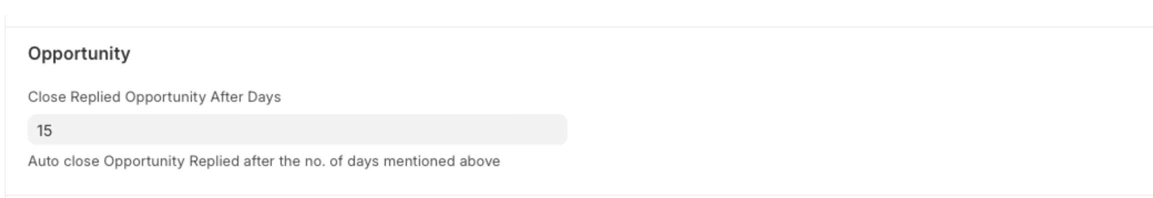
2. Allow Lead Duplication based on Emails

If this is enabled, the system will allow users to create multiple leads with the same email address at the same time.

3. Auto Creation of Contact

The system will automatically create a new Contact on creation of a Lead.

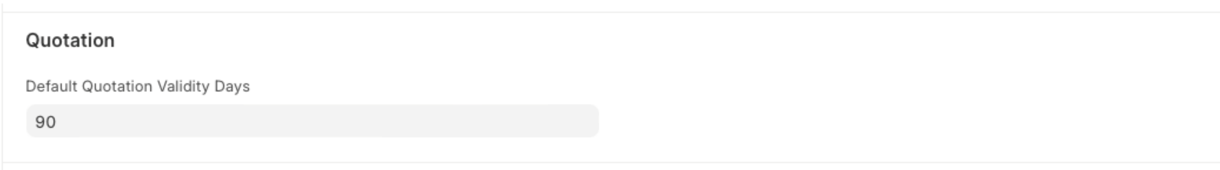
Opportunity



1. Close Replied Opportunity After Days

If there are many Opportunities having a status other than Open, then they will be auto-closed after the no. of days mentioned in this field if there is no action.

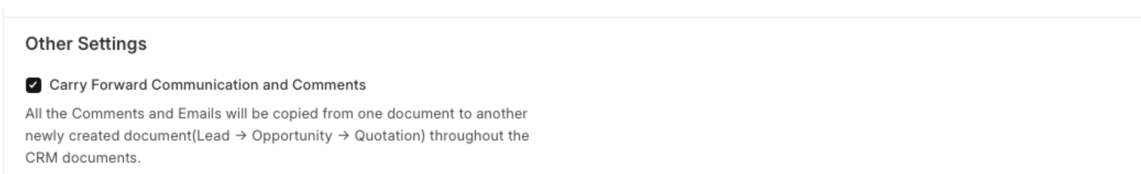
Quotation



1. Default Quotation Validity Days

You can configure quotations to the customer to be valid only for certain days. In the Quotation, you can update Valid Till Date manually. By default, the Valid Till date is auto-set as 30 days from the Quotation's Posting Date. You can change the no. of days in this field as per your business case.

Other Settings



1. Carry Forward Communication and Comments

If this is enabled, When converting a Lead into Opportunity and Opportunity to Quotation, the system will auto copy the emails and comments from the source document.

Social Media Settings

Social media settings in DellSuite play a crucial role in modern business management.

These settings enable businesses to integrate their ERP system with various social media platforms, such as Twitter, LinkedIn. By connecting DellSuite with social media, businesses can streamline their marketing efforts, enhance customer engagement, and gather valuable insights into consumer behavior.

LinkedIn Settings

Note: This integration is deprecated and will be removed in v15.

LinkedIn related settings like OAuth can be configured here. DellSuite needs access to the API through which the post is shared and achieved using OAuth 2.0 Authentication Protocol.

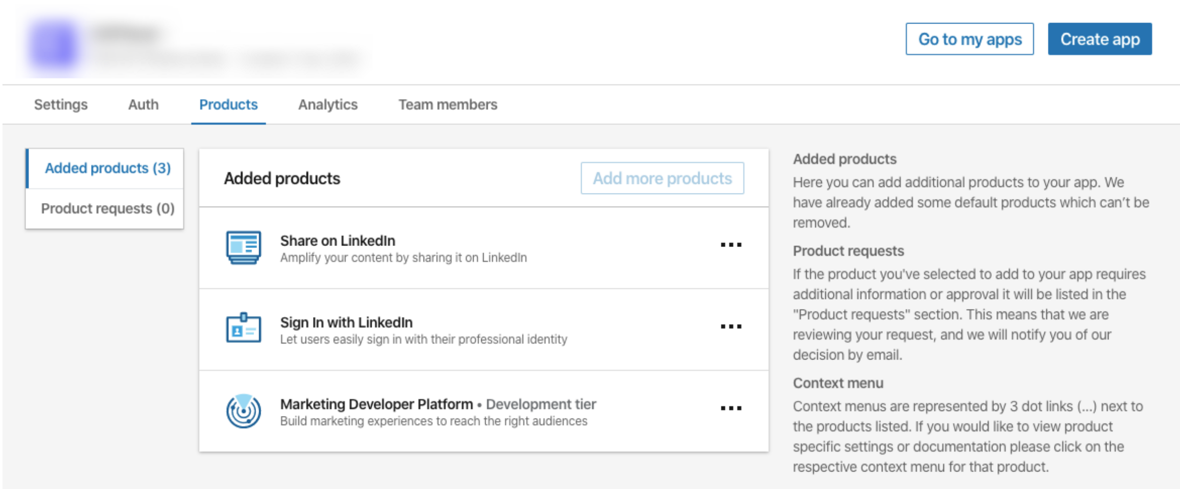
1. How to set up LinkedIn Developer App

You must have LinkedIn Developer App for your company. DellSuite interacts with this App for sharing the post.

1.1 Create LinkedIn Developer App

Create App by link `https://www.linkedin.com/developers` fill all the details and verify it. And that App has the following products.

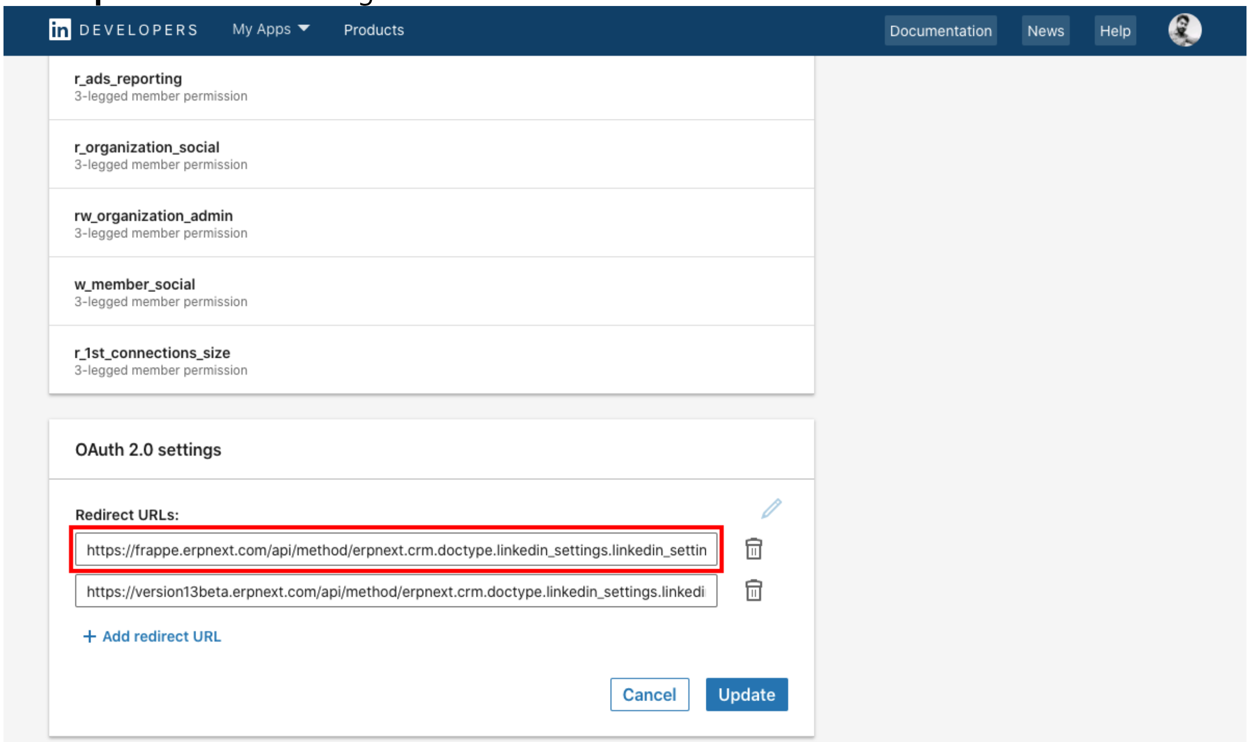
1. Share on LinkedIn
2. Sign In with LinkedIn
3. Marketing Developer Platform



1.2 Configure Redirect URLs:

1. Goto your LinkedIn Developers App then **Auth** tab.
2. In **OAuth 2.0 settings** section add **Redirect URLs**: https://{yoursite}/api/method/DellSuite.crm.doctype.linkedin_settings.linkedin_settings.callback

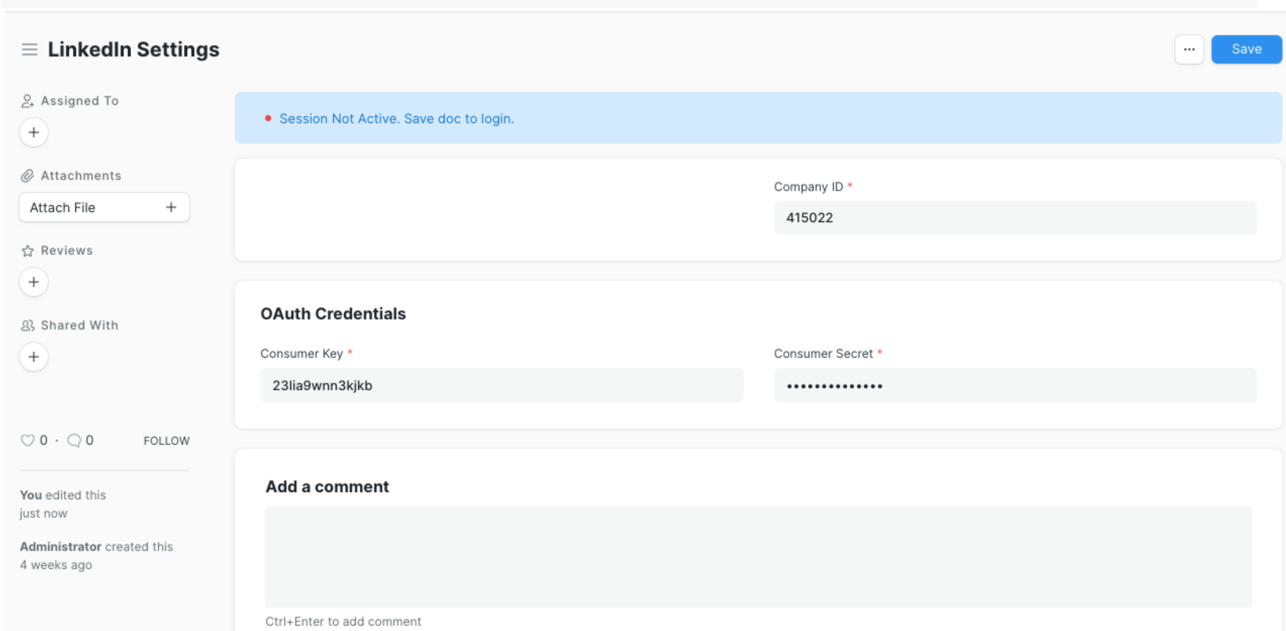
3. Click **Update** to make changes.



2. How to set up LinkedIn Settings

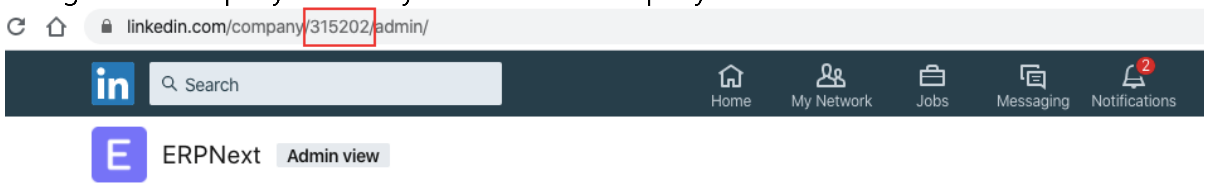
To access LinkedIn Settings, go to:

Home > CRM > Settings > LinkedIn Settings



Company ID

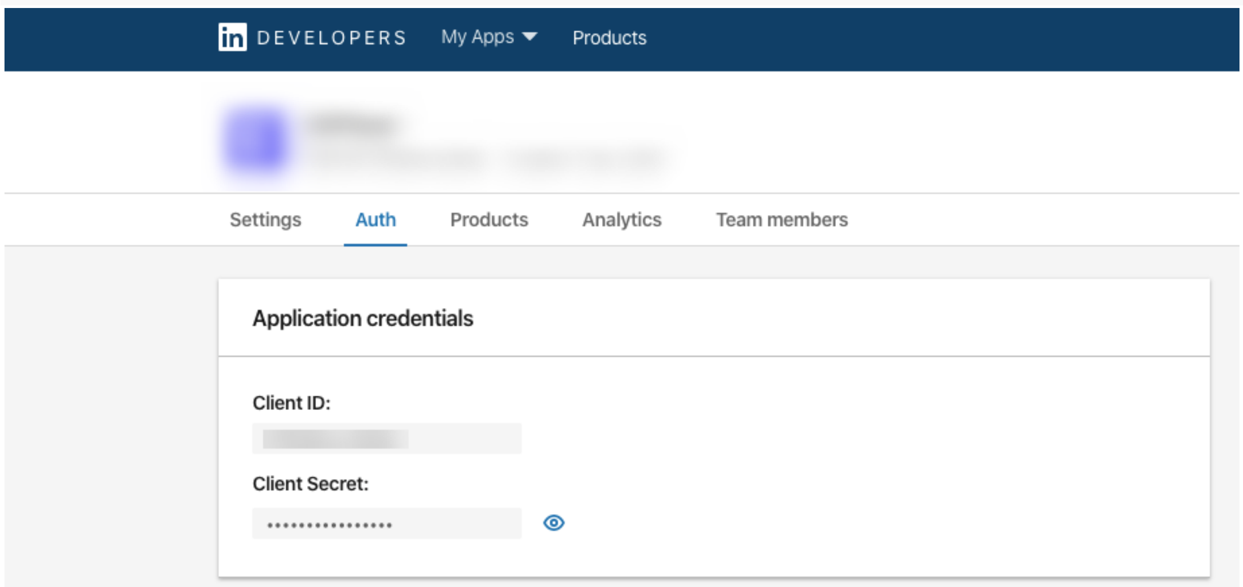
You get the Company ID from your LinkedIn Company URL.



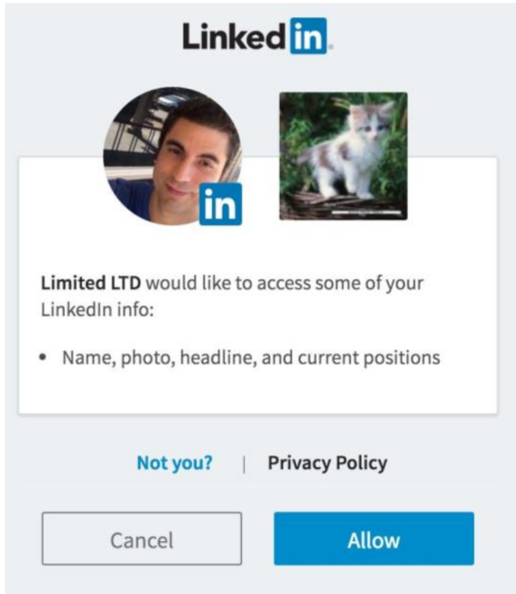
Consumer Key and Consumer Secret

You get **Consumer Key** and **Consumer Secret** from your LinkedIn Developer account go to:

`https://www.linkedin.com/developers/` > My Apps > `{Your App}` > Auth



Once you save the doc by filling **Company ID**, **Consumer Key**, and **Consumer Secret** it will redirect to LinkedIn's sign-in page by providing valid LinkedIn credentials and clicking Allow, the member approves your application's request to access their member data and interact with LinkedIn on their behalf.



Twitter Settings

Note: This integration doesn't work anymore due to Twitter's API changes. This has been removed from DellSuite starting from v15.

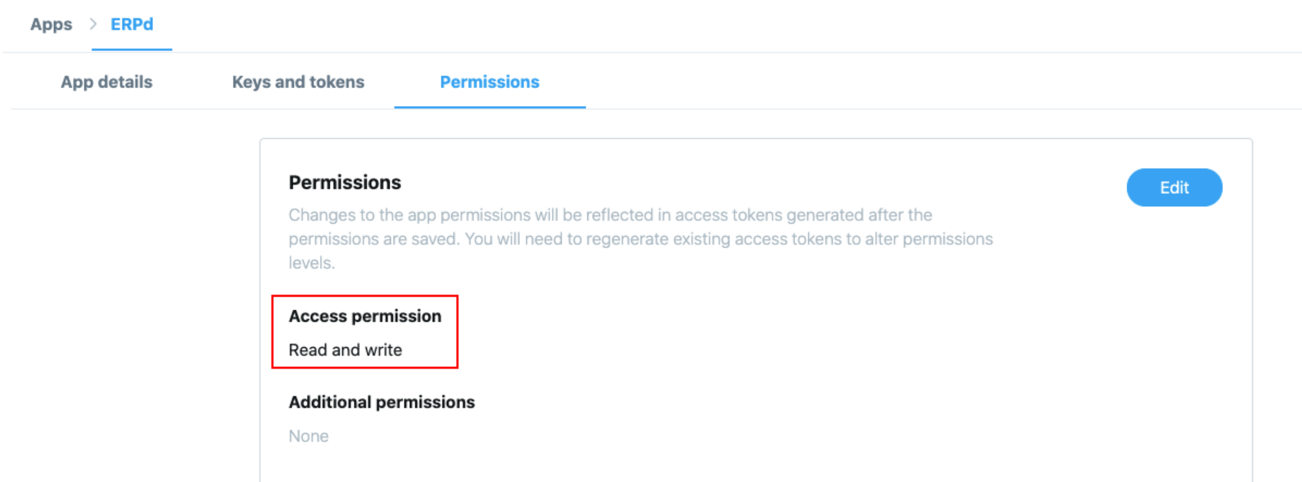
Twitter related settings like OAuth can be configured here. DellSuite needs access to the API through which the post is shared and achieved using OAuth 2.0 Authentication Protocol.

1. How to set up Twitter App

You must have Twitter App for your company. DellSuite interacts with this App for sharing Tweet.

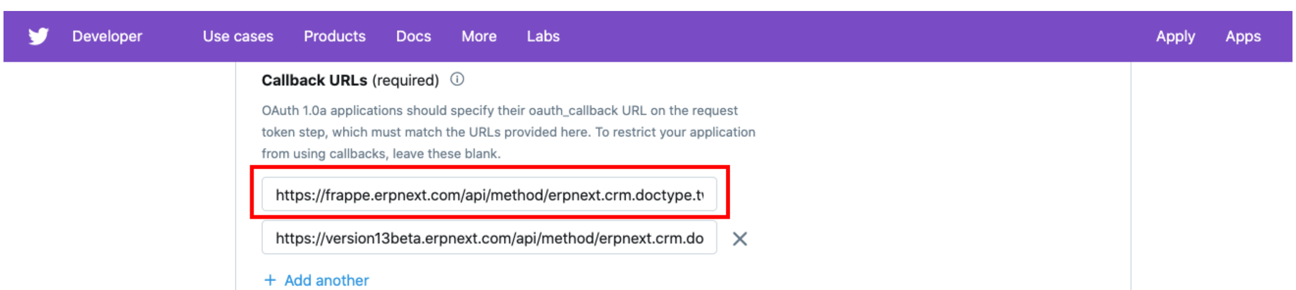
1.1 Create Twitter Developer App

Create App by link https://developer.twitter.com/ and check that the App has **Read and write** Access permission.



1.2. Configure Callback URL

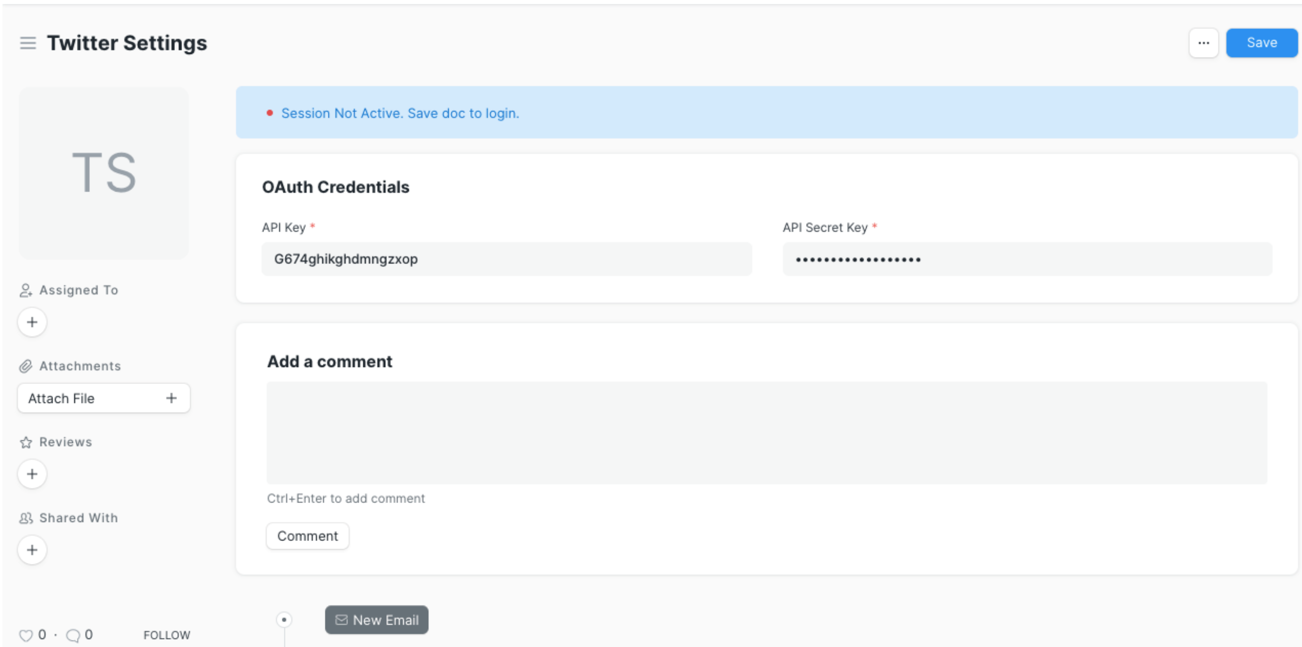
1. Select your App and go to **App Details**.
2. Then go to **Edit** and click **Edit Details**.
3. Add your website URL in **Callback URLs** like: https://{yoursite}/api/method/DellSuite.crm.doctype.twitter_settings.twitter_settings.callback
4. Click **Save** to make changes.



2. How to set up Twitter Settings

To access Twitter Settings, go to:

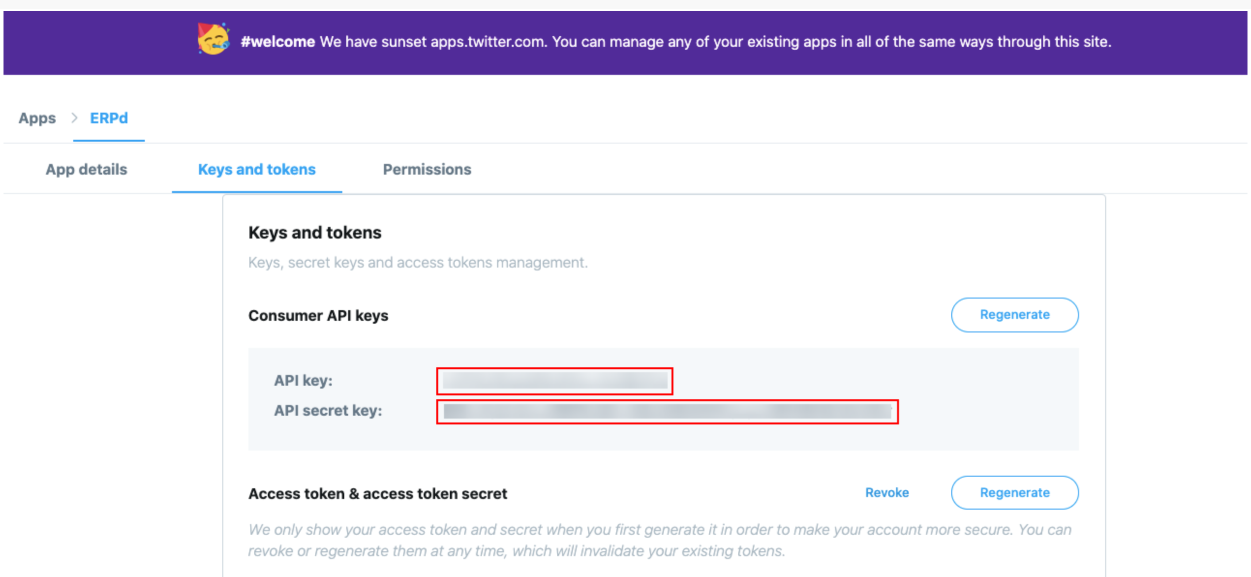
Home > CRM > Settings > Twitter Settings



2.1 API Key and API Key Secret

You get **API Key** and **API Key Secret** from your Twitter Developer account go to:

`https://developer.twitter.com/` > My Apps > `{Your App}` > Keys and tokens



Once you save the doc by filling **API Key** and **API Key Secret** it will redirect to Twitter's sign-in page by providing valid Twitter credentials and clicking **Authorize app**, the member approves your application's request to access their member data and interact with Twitter.

CRM Analytics

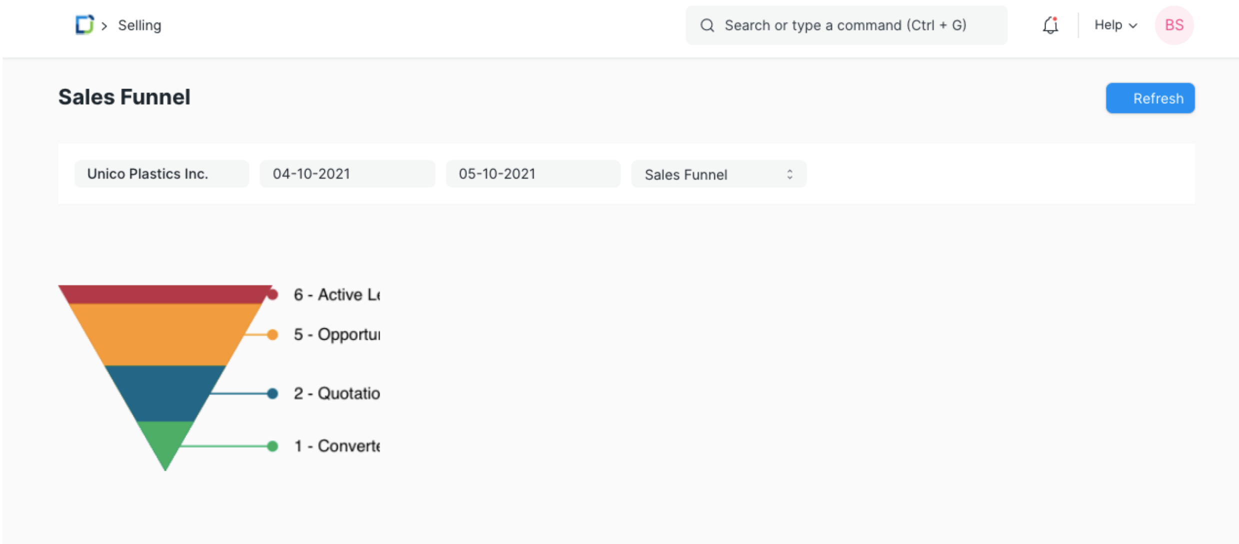
For example, if you notice that very few communications with the prospects have taken place in a month which may have led to decrease in the sales. You can make sure that the sales executives reach out and followup on the leads and opportunities on regular basis.

1. Sales Funnel

By using the sales funnel report, you can quantify the number of prospects at each stage of the process and you can get an idea of your potential customers.

More than this, by looking at the way these numbers change over time, you can identify problems in the sales pipeline and take any corrective action at an early stage.

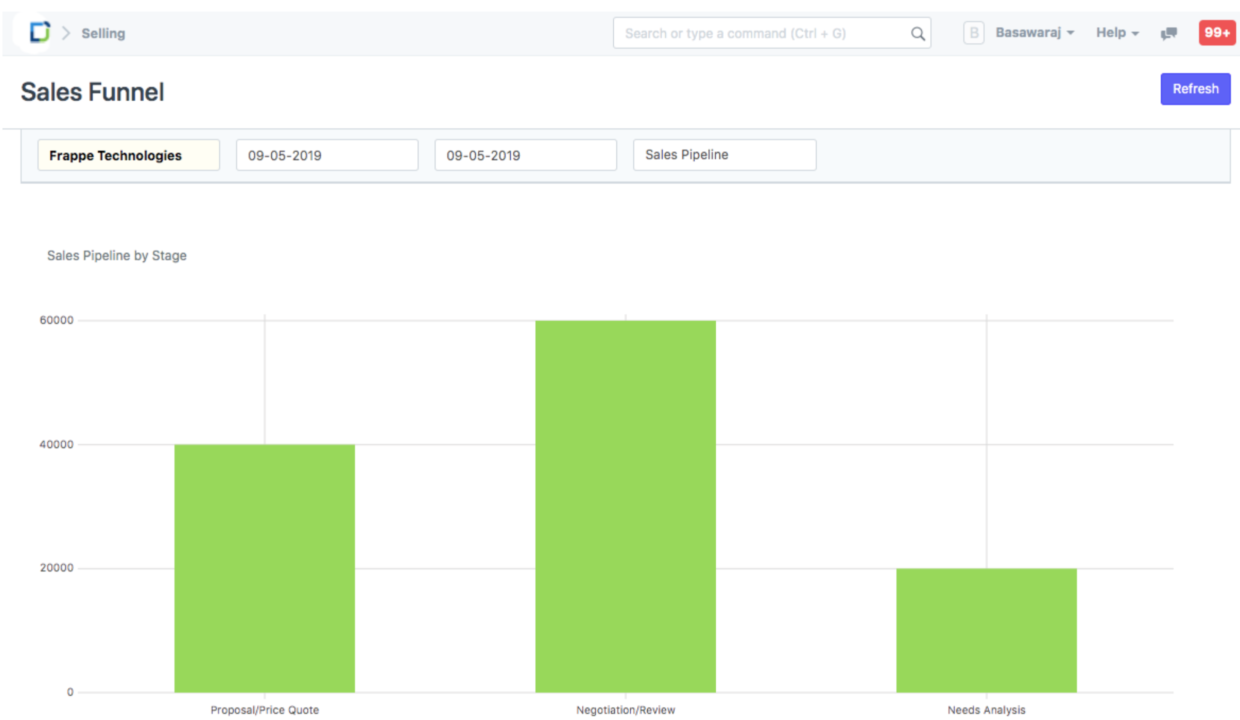
Select the Company, select the From Date, To Date and select Sales Funnel in Chart.



2. Sales Pipeline

An opportunity will pass through many sales stages before it yields any business. Using this report you can visualise the total amount of business the opportunities have and compare them across the stages.

Select the Company, select the From Date, To Date and select Sales Pipeline in Chart.



3. Opportunities by Lead Source

This report helps you visualise the business potential of opportunities based on the Lead Sources.

Select the Company, select the From Date, To Date and select 'Opportunities by Lead Source' in Chart.