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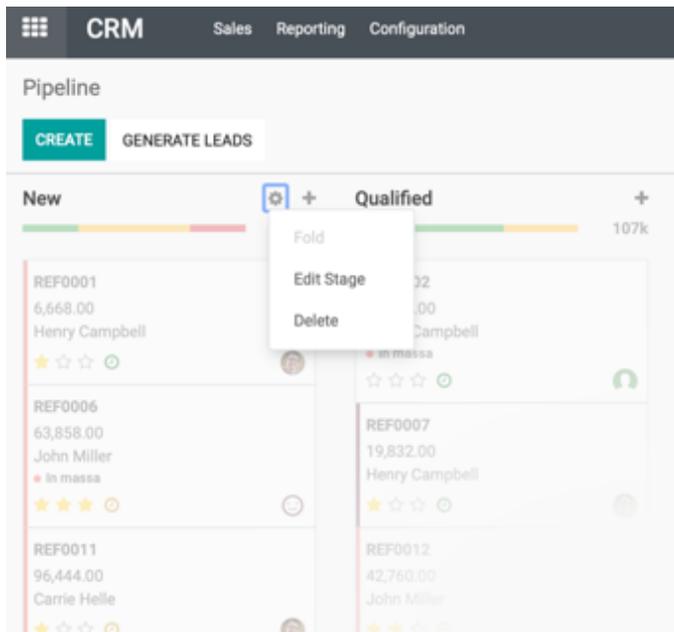
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CRM Module (Pipeline lead management)

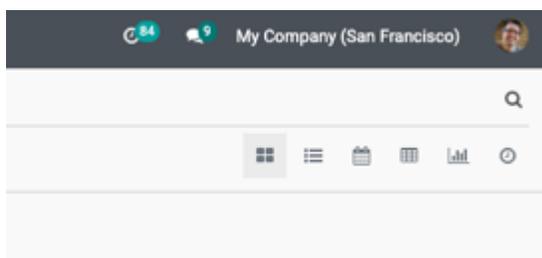
i. CRM layout introduction

When entering the **CRM module** you will see 5 different stages in the pipeline: **New, Qualified, Proposition, Won, Closing**. Each record can be moved to different sales status by drag and drop method.

Stage names and the number of stages can be customized based on your needs. Click on the gear button → Edit Stage, or the + button to add more stages.



With the icons on the upper right hand side you can analyze your business opportunities from different angles such as listing, calendar, pivot, graph and activity view.



ii. Create a business opportunity/lead

Create a new record by clicking on the **Create** button. Enter and select the information for each field, such as **Organization/Contact**, in the **Opportunity** field enter the type of product or service the customer is interested in, **Email, Phone, Expected revenue**. The **Stars** icon represents the level of importance or priority this record is. Then press **Add** to finish.

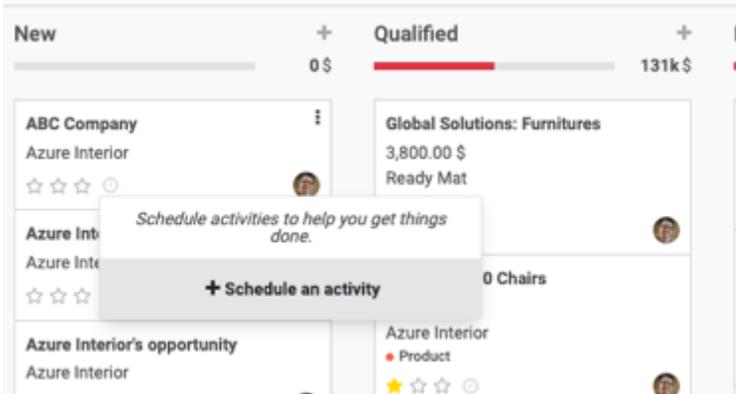
The screenshot shows the 'New' record form in the CRM Pipeline. At the top, there are tabs for 'CRM', 'Sales', and 'Reporting'. Below the 'Pipeline' header, there are two buttons: 'CREATE' and 'GENERATE LEADS'. The form is titled 'New' and shows a value of '0 \$'. The form fields include: 'Organization / Contact' (dropdown), 'Opportunity' (text input with 'e.g. Product Pricing' as a placeholder), 'Email' (text input), 'Phone' (text input), and 'Expected Revenue' (text input with '0.00' and a '\$' symbol, followed by three star icons). At the bottom, there are three buttons: 'Add', 'Edit', and 'Discard'.

If you would like to add extra information for the created record, you can click on the record, and press **Edit**. Here you can add extra details such as select the responsible **Salesperson** and **Internal notes**. Press to **Save** to finish.

The screenshot shows the 'Edit' record form for an Opportunity in the CRM Pipeline. The header shows 'CRM' and 'Sales Reporting Configuration'. The page title is 'Pipeline / ABC Company'. There are buttons for 'SAVE' and 'DISCARD'. Below the header, there are buttons for 'NEW QUOTATION', 'MARK WON', and 'MARK LOST'. The main form is titled 'Opportunity' and 'ABC Company'. It includes fields for 'Expected Revenue' (0.00) and 'Probability' (20.39%). The form is divided into sections for 'Customer' (Azure Interior), 'Salesperson' (Michael Admin), and 'Sales Team' (Europe). There are also fields for 'Expected Closing', 'Priority', 'Tags', and 'Company' (My Company (San Francisco)). At the bottom, there are tabs for 'INTERNAL NOTES' and 'EXTRA INFORMATION', and a text area for 'Add a description'.

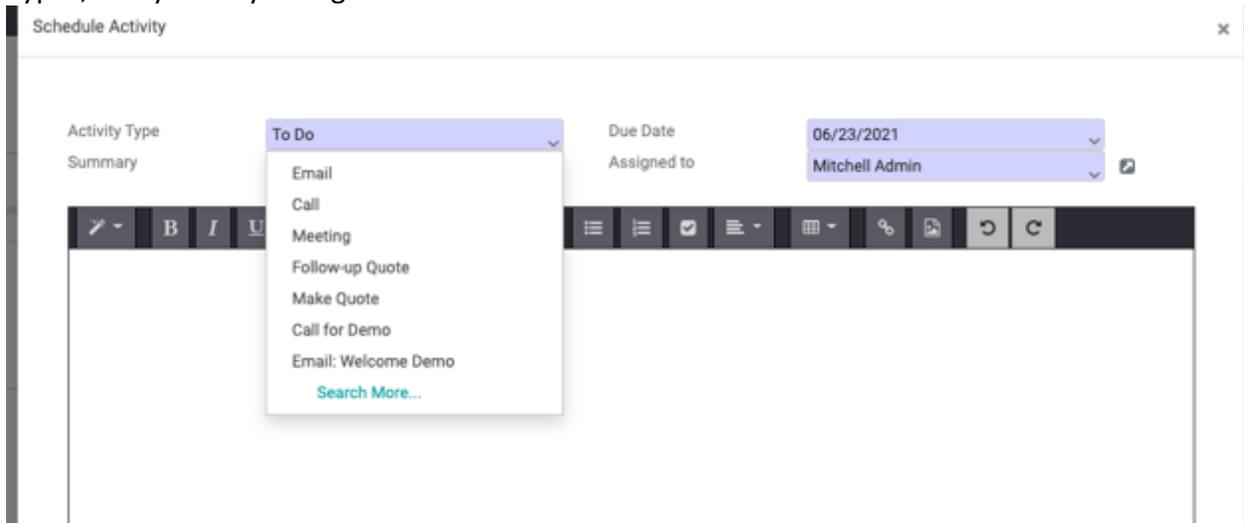
iii. Plan activities

Plan an activity for each record by clicking on the **clock icon**, **+Schedule an activity**.



In the **Activity Type** section select the type of activity, **due date**, and **assigned to** the person responsible for this task. Press on **Save** to save it. If the **clock icon** is highlighted in green it means that there is an activity that needs to be followed up.

If you would like to customize your activities type, you can go to Configuration → Activities Types, and you may change them.



In order for you to better keep track of the leads from the same customer, but different opportunities, in each CRM, you can create “New quotation”, so the quotation will stay specifically for this lead. Once you click new quotation, it would open a quotation under the ‘Sales Module’.

iv. Manage multiple sales teams

In W+ ERP, you can manage several sales teams, departments or channels with specific sales processes. To do so, we use the concept of Sales Teams.

v. Create a new sales team

To create a new sales team, go to **Configuration**→**Sales Teams**→**Create**.

Insert the name of the Sales Team, select if you wish the sales team to have access to quotations and pipeline, assign a team leader, here you can also add members.

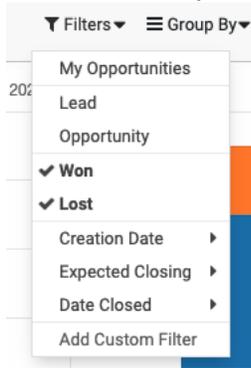
Use the sales team filter to show a specific sales team on your timeline.

vi. Check your Win/Loss Ratio

To see how well you are doing with your pipeline, take a look at the Win/Loss ratio.

To access this report, go to your Pipeline view under the Reporting tab on the menu bar.

From there you can filter to which opportunities you wish to see, yours, the ones from your sales channel, your whole company, etc. You can then click on filter and check Won/Lost.



Select different types of **Measures**, and switch to different types of views by clicking on the buttons next to **Measures**.

