

CRM


Contacts Management

- CRM Module






CRM Module





In CRM Module there are the following containers:


 CRM (Ordered Relations Container)


Last modified by [Administrator Admin](#) on 11/17/2024, 3:24:20 AM





 All Contacts


 Affiliate


 Individuals


 Companies


 Leads


 Prospects


 Customers


 Suppliers


 Clients

 Partners

 End-Users

 Dealers

 Offices

 Duplicated Contacts

All Contacts is a container, which contains all kind of Contacts created in Lapis

Creating Individual

Creating Individual can be done by opening **Individuals** and pressing **Create New Individual**:

Individuals (Query Container)

[Create New Individual](#)

<input type="checkbox"/>	Title	Accountable Persons	Emails	Phone Numbers	Re	
	Evgeni Onegin					
	Manager LAPIS		manager@profuzdigital.com	+359888555555		
	Ivan Ivanov		ivan@playbox.com	+359 555 64 64 64		
	Perspective		someone@example.net	+555-254-542		
	Julia Styles		steve@apple.com	+359888585858		
	RadiancePR			+555 123 4567, +555 9090 123/43, +555 08975434		
	Bull Bridges		steve2@apple.com	02 555 69 83 24		
	Metodi		metodi@example.net			
	Carol Harringer		carol@jandp.com	0987 128 196		
	Julia Styles		employee@profuzdigital.com	+1 650-253-0000		

The new window will appear with details to be added, as only Full name is mandatory:

New Draft-Individual

Standard edit

Collaborators: Administrator Admin

Full Name *

Contact Type

Filter...

Skills

Add New Skill

Description

B **I** **U** **S** **A** **A** ...

Company

Filter...

Cancel

Create

Contact Type shows if the Individual is Affiliate, (the one that is the owner of the system) or External, which is then defined further by Relationship Role - Client, Supplier, Partner or a

combination of those.

Note: Please, have in mind Relationship Roles will appear, once the Contact Type is set to External, and Safe Draft button at the bottom of the screen is pressed.

Created by Administrator Admin on 11/17/2024, 3:34:14 AM

George Peterson (Draft-External-Individual)

Collaborators: Administrator Admin

Standard edit

Full Name *

George Peterson

Contact Type

External

Relationship Roles

Filter...

Skills

Add New

Supplier

Partner

Client

Description

Company

Filter...

Cancel

Create

If Client is selected and Safe Draft pressed after that, then Sales Status can be defined:

Contact Type

External

Relationship Roles

Client

Filter...

Sales Status

Filter...

Lead

Customer

Prospect

Add New Skill

Description

Sales status can be used to choose marketing activities

By pressing Create the Individual is created.


 **George Peterson** (Client-External-Individual-Lead)

Create User



Full Name
George Peterson

Phone Numbers
 **+555-123-4567-890**

Emails
george@mail.com

Web sites

Skype Names

Facebook

Properties

Description

General data Sales Data Financial data Marketing data

Company

Address

Emails
george@mail.com

...

Creating a Company

Creating new company can be done by Create New – Contact and Selecting type Company

Create New ▾ My Area

Contact

Project

Task

Folder

Category

Document

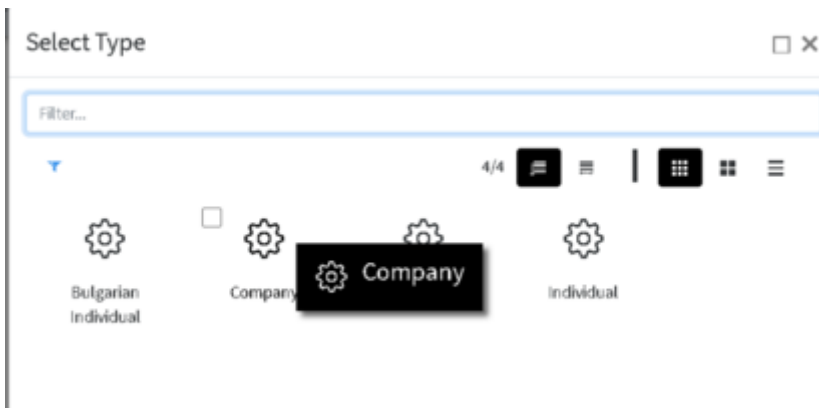
Image

Video

User

Group

Other



Once Company is selected, the new window will Appear with details to be added, as only Full name is mandatory.

Contact Type shows if the company is Affiliate, which can be the Home company (the one that is the owner of the system or its affiliate) or External, which is then defined further by Relationship Role - Client, Supplier, Partner or a combination of those.

Note: Please, have in mind Relationship Roles will appear, once the Contact Type is set to External, and Safe Draft button at the bottom of the screen is pressed.

Phone Numbers:

Skype Names:

Facebook:

LinkedIn:

Twitter:

Address Country:

State/Province:

City:

Postal Code:

Address Line 1:

Address Line 2:

Address Line 3:

Containers:

With Create the process is finishes and object is created.

Client company 1 (Client-Company-Customer-External-Translation)

Full Name: Client company 1
Phone Numbers: +359887774444
Email: clientcompanyone@mail.com

Web sites:

Properties

Skills: ☒ Translation

Description:

Company:

Main Currency:

Sales Status: ☒ Customer

Skype Names:

Facebook:

LinkedIn:

Twitter:

Address: Bulgaria, Sofia, 1000, Gerko, 21

VAT Number: BG1005487523

Company ID: 1005487523

Accountable Persons:

Containers:

Users:

Contacts in the company: Client Manager 1

Activity Tasks Deals Quotes Orders Invoices Relations

Types ☒ Comment Activity

Adding other properties such as VAT number, company ID, Accountable Person etc can be done in Actions – Edit and if not visible in the Standard Edit mode, chose Advanced Edit Mode.

CRM / Contacts / Client company 1 /

Client company 1 (Client-Company-Draft-External)

Standard edit ▼ Collaborators: administrator

Standard edit name * Client company 1

Advanced edit image

Description **B I U** **A** ...

Contact Type External 🔍

Company

Managing Marketing Activities

As seen on the above sections, there are multiple parameters you can associate with the contacts. A part from the widely used and standard ones like Name, email(s), phone(s), address(es), social media accounts (Twitter, Facebook, LinkedIn, Skype, etc.), you can also set Company Positions, Departments, Hierarchical Managers and Skills (those are specific skill sets used in company specific business niche and required from internal and external human resources. In the contacts, you can also input data which to be used for the sales, marketing and financial operations with this contact. Such properties are:

- Sales parameters:
 - Relationship role – client, partner, supplier
 - If the contact is with a client relationship role, then you can set its sales status – lead, prospect, customer

This way you can differentiate between marketing leads, potential clients (prospects) and existing clients (customers).

- For marketing purposes and to comply with the GDPR and other data protection regulations you can track the e-mail marketing activities for which your clients have subscribed/unsubscribed. The default activities are:
 - Newsletters
 - Promotions
 - Product Announcements
 - Email Marketing

Marketing activities for each contact can be set or edit via Actions - Edit (Advanced Edit Mode) under Marketing Activities property

Marketing Activities	Marketing Activity	Status
Add New Marketing Activity Restricted Hash		

Adding new activities can be done by pressing Add New Marketing Activity and selecting options

Marketing Activities

Marketing Activity

Status

Type: Marketing Activity Restricted Hash

Marketing Activity *

Select Value

Status *

Select Value

Add New Marketing Activity Restricted Hash

Marketing Activities

Marketing Activity

Status

Type: Marketing Activity Restricted Hash

Marketing Activity *

Select Value

Status *

Product Announcements

Email Marketing

Promotions

Newsletters

Change Values

g Activity Restricted Hash

Institution Type

When finished press Safe.

It will appear in the contact info as follows:

Marketing Activities:	Marketing Activity	Status
	Email Marketing	Subscribed