

CRM Module



In CRM Module there are the following containers:

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

CRM (Ordered Relations Container) 🔒 🗑️ 🔗 📝 ⋮

 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

Skills

Description

Company

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) 🔒 ✏️ ⋮

Standard edit ▾ Collaborators: Administrator Admin

Full Name *
George Peterson

▼

Contact Type: External Relationship Roles: Filter...

Skills: Add New

- Supplier
- Partner
- Client**

Description: **B I U**

Company: Filter...

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

▼

Contact Type: External Relationship Roles: Client X 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

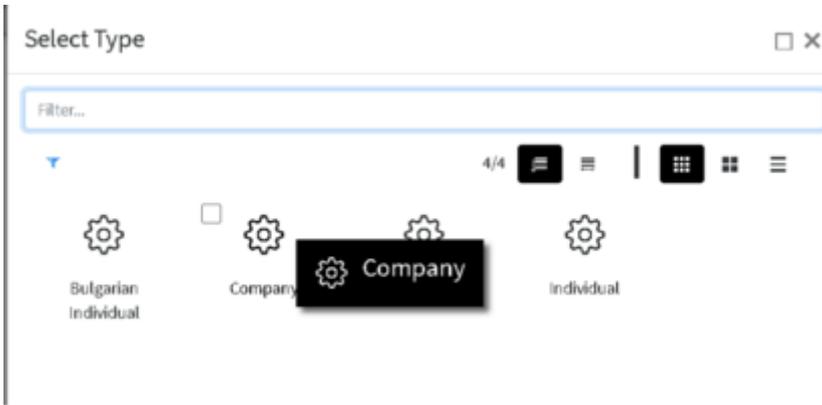
george@mail.com

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 Save Draft button at the bottom of the screen is pressed.

Phone Numbers:

Skype Names:

Facebook:

LinkedIn:

Twitter:

Address Country: **Bulgaria**

State/Province: **Избор на област...**

City:

Postal Code:

Address Line 1:

Address Line 2:

Address Line 3:

Containers:

With Create the process is finished 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** | Sales Status: **Customer**

Description:
 Company:
 Main Currency:

Skype Names: | LinkedIn:
 Facebook: | 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

B T I A W 6/51

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*	Select Value
	Add New Marketing Activity Restricted Hash	
Institution Type	Change Values	

When finished press Safe.

It will appear in the contact info as follows:

Marketing Activities:	Marketing Activity	Status
	Email Marketing	Subscribed

Revision #3

Created 15 November 2024 16:30:45 by Pierre

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