Andersen

Andersen
CRM Sales

User Guide v.1.0

Contents

About us 4

User roles 4

Users 5

Add user 6
View users 6
Edit user 7
Monitor user 7

Sales 7

“Add sale” form 8
Lead, created from a social network reply 9
“Express-sale” form 11
Import sale 11
E-mail sale 12
Edit sale, company and contact 12
Add and edit activities 12
“Desktop” page 13
Auto assignment of sales 13
Auto assignment of companies 14

Requests for CVs 15

Add request for CV 15
Edit request for CV and work with it 16
Add, edit and view CVs 16
View all requests for CV 17

Requests for estimation 18

Add request for estimation 18
Edit request for estimation and work with it 19
View all requests for estimation 19

Downloads 20

Search 20

Reports 21

Lead report 21
Activity report 23
All social network replies 23

NC ratings 24

About us

Inspite of the fact that market is overflowing with a great variety of CRM systems we still may claim uniqueness. Designed specially for IT company, Andersen CRM Sales succesfully automates basic business processes which are meant to meet a customer with the company in a most comfortable way. Thus our system let users:

- save customer information and the history of interactions with them,
- analyze sales and activities based on the reports provided in the system,
- keep an eye on the the quality of emplyees work due to the reports suplied,
- broadcast and process qualification requirements for the specialists being sold,
- manage the process of coordinating innumerable CVs of the specialists,
- manage the process of estimating the projects being offered to customers.

User roles

Andersen CRM Sales has a number of user roles. They bare different functions and comply with business-as-usual processes align with employees engaged in Sales and Marketing departments.

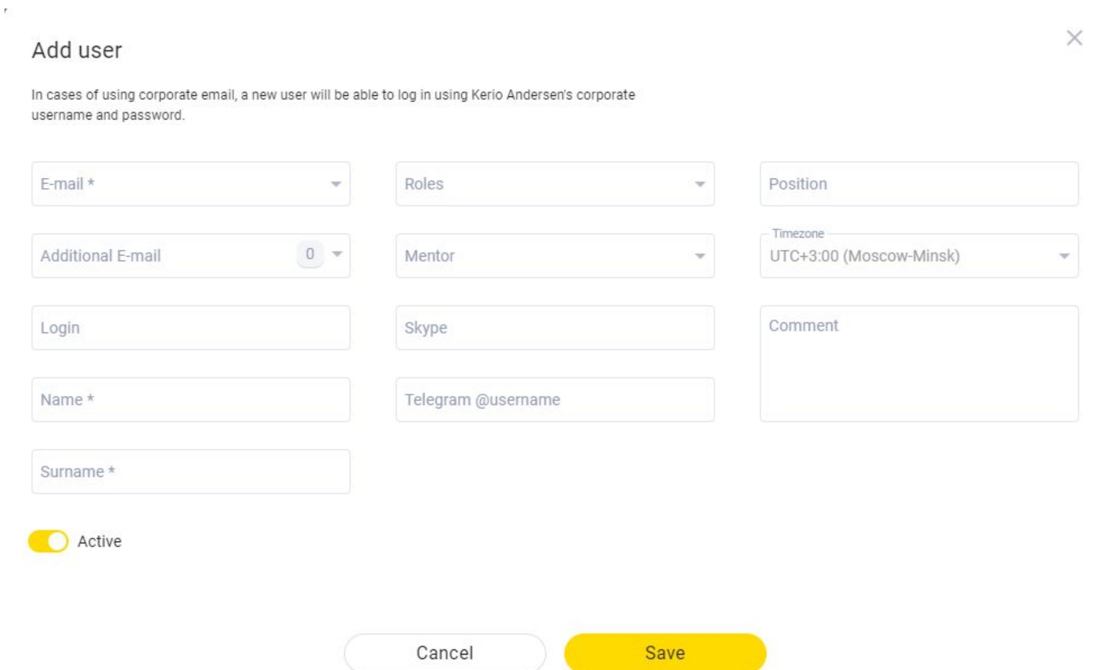
1. Sales (ordinary Sales employee);
2. Sales Head (Head of Sales department);
3. Network Coordinator (Presales employee);
4. RM (Resource Manager);
5. Manager (other employees: PM, BA, etc.);
6. HR (Human Resource Manager);
7. Admin (system administrator).

Users

Admin can manage users: adding them, editing, viewing, monitoring their activities. All these functions are available on the “Users” page.

Add user

1. Click on the “plus” icon in the up-right corner of the page.
2. Fill the form, paying attention to the required fields.



3. Save it.

View users

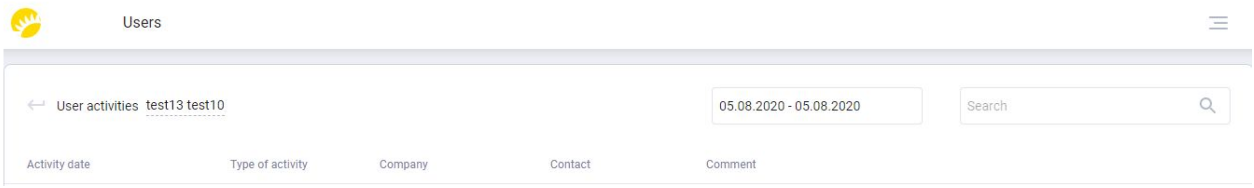
All Andersen CRM Sales users are contained in the table “CRM users”. You can apply filters in the table header and select the employee according to specified parameters.

Edit user

1. Tap on “Kebab menu” right of the user row.
2. Select “Edit”.
3. Make necessary changes in the form “Edit user”.
4. Save it.

Monitor user

1. Tap on “Kebab menu” right of the user row.
2. Select “Activities”.



3. Choose date range or apply search
4. There are all records of the user activities in the table. [Types of activities: Call, E-mail, Social Network, Meeting, Interview].

Sales

There are several ways sales can be created in the system:

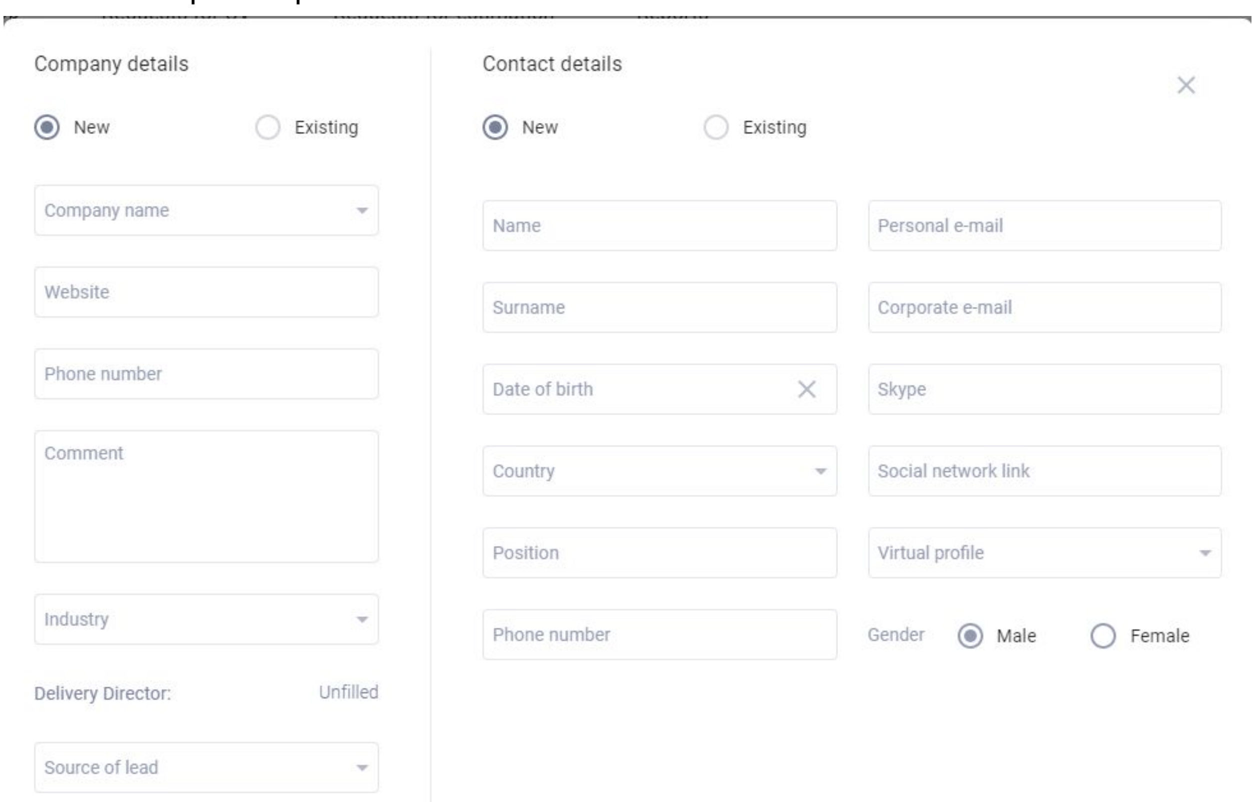
1. By filling in the form [“Add sale”](#);
2. From [social network replies](#) by saving it as a Lead;
3. By filling in [“Express-sale” form](#);
4. [Automatically by filling in the form on the integrated website](#);
5. [By redirecting mails to the common corporative e-mail.](#)

“Add sale” form

As [Sales](#) and [Sales Head](#) user can manually create sales.

1. Tap on “plus” in header.

2. Select the required options.



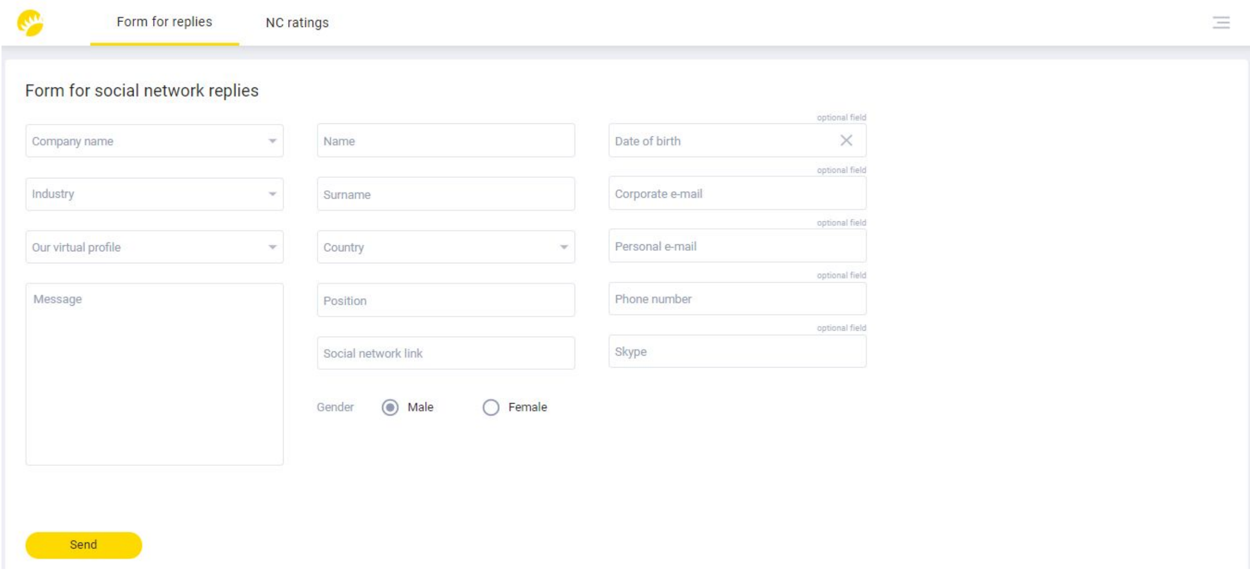
Different options are available. You may create new:

- Sale, Company and Contact
- Sale and Contact
- Only Sale

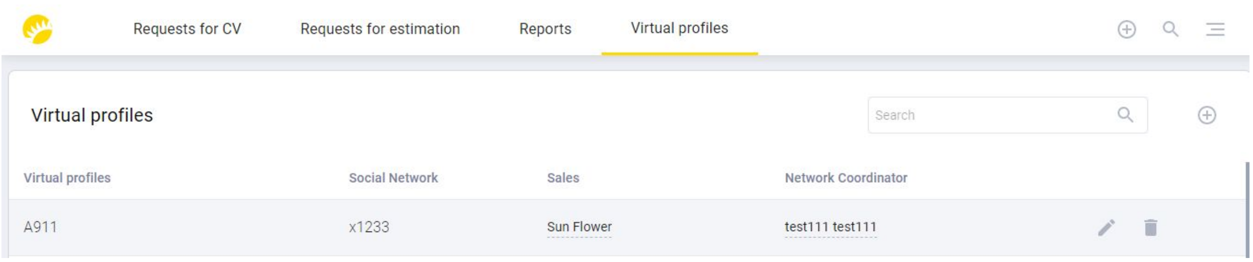
3. Fill the form.
4. Save it.
5. The user created the sale is set up as Responsible for that.

Lead, created from a social network reply

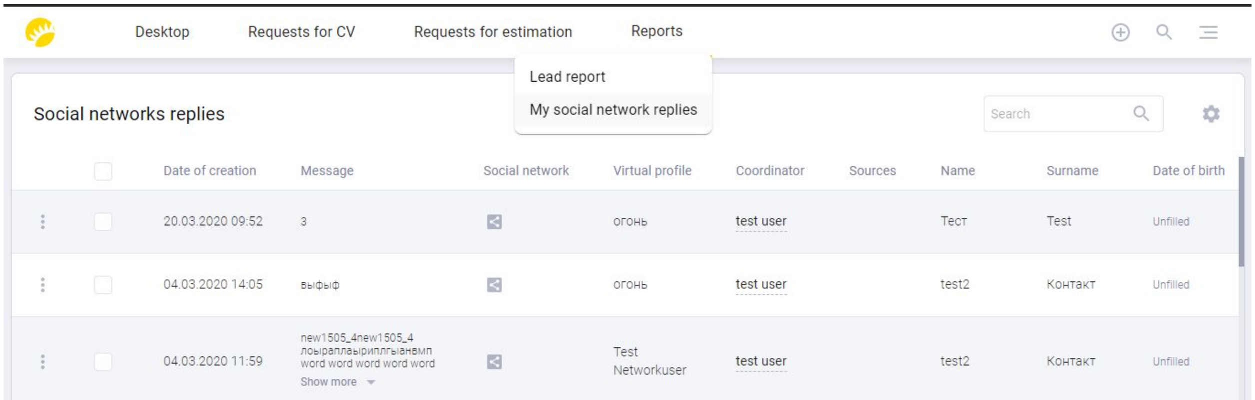
1. As a Network Coordinator fill in the Form for social network replies and save it.



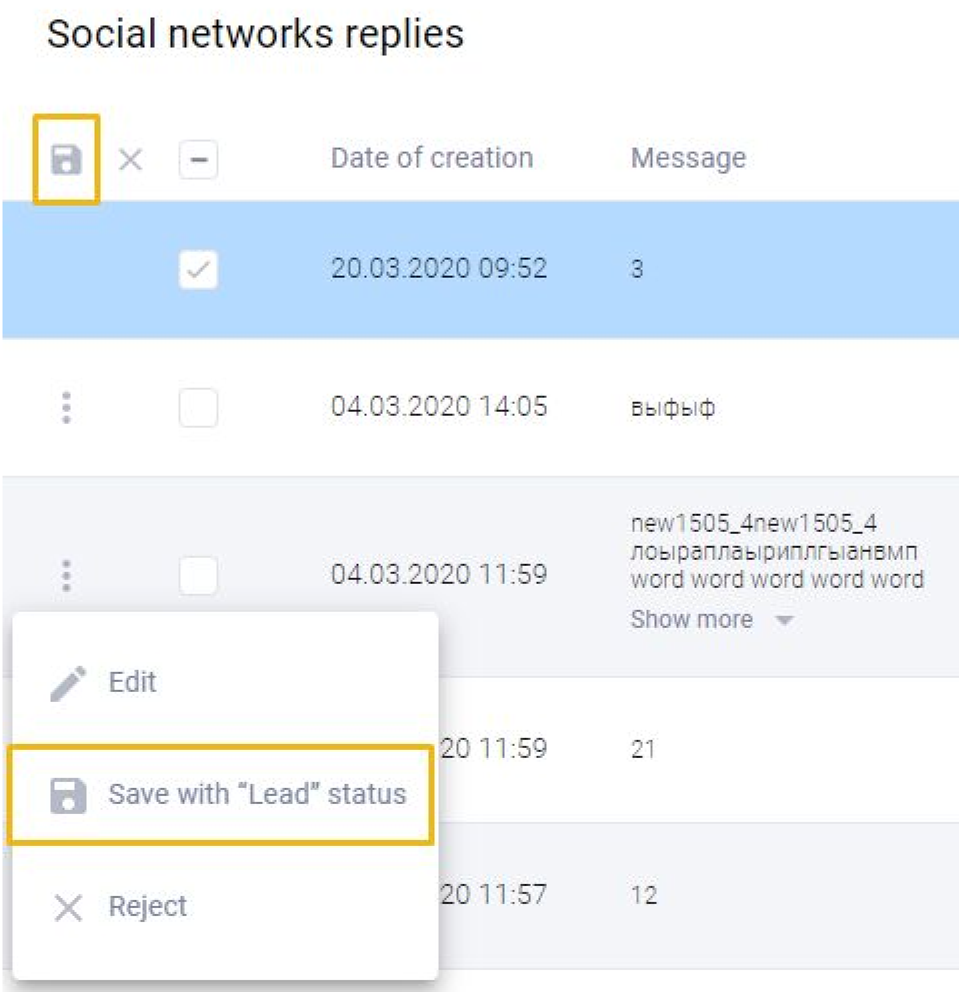
2. Network Coordinator has a defined connection with a certain Sales. This connection is set up on “Virtual profiles” page by Sales Head.



3. Sales can view, edit, save and reject social network replies of “his” Network Coordinators on the “My social networks replies” page.

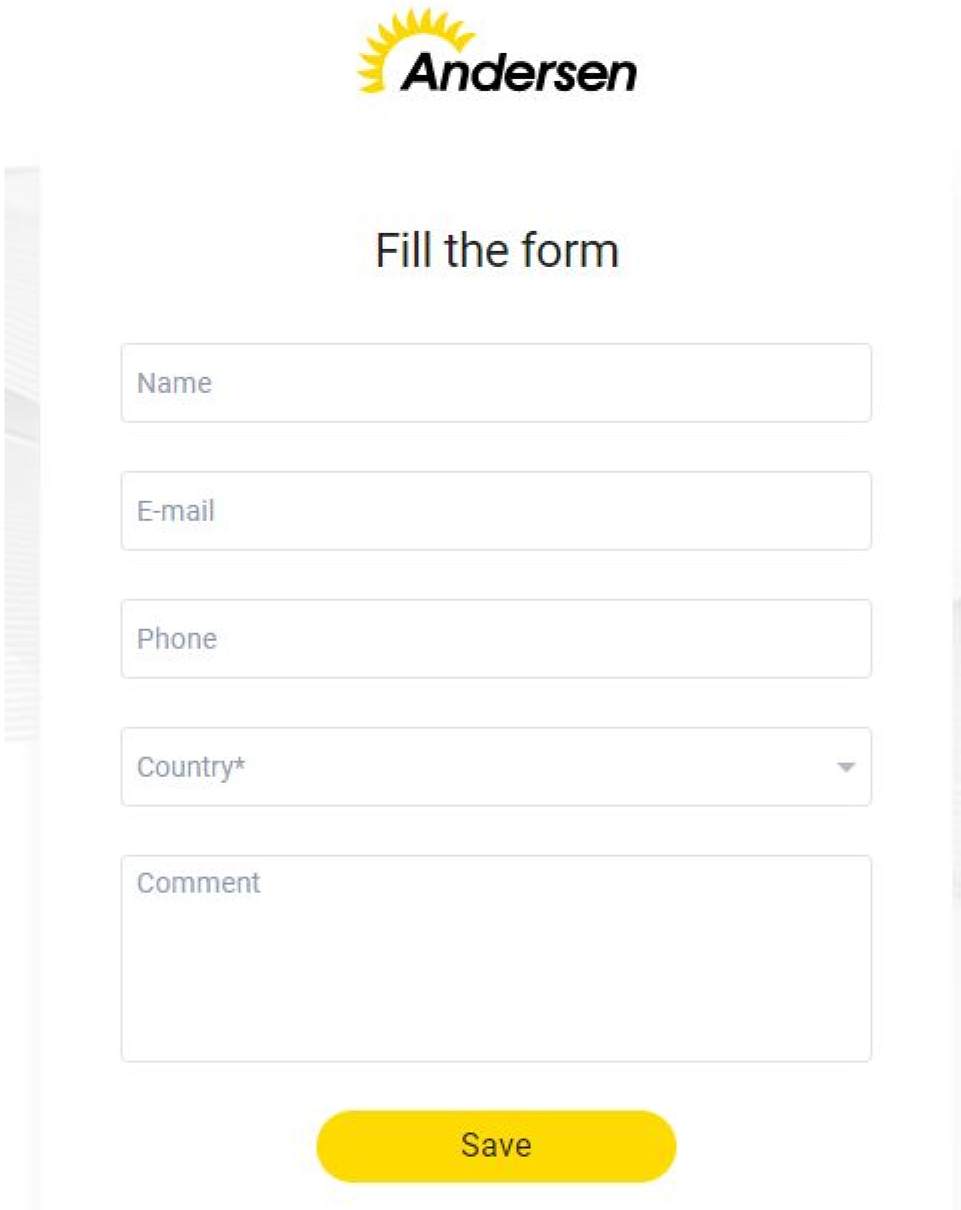


4. To save the reply and convert it into the sale one need either to save it individually by choosing “Save with “Lead” status” in kebab menu or to select multiple rows and save a group of replies.



“Express-sale” form

The form has an open URL and doesn’t require authorization. To create sale fill the form and save it. This feature is meant for a limited range of authorized users. It provides a quick access to the function of creating sale being distributed automatically among Sales Managers.



Import sale

Due to the realised function sale might be created by the request coming from the external services. Responsible for this type of sale is assigned automatically.

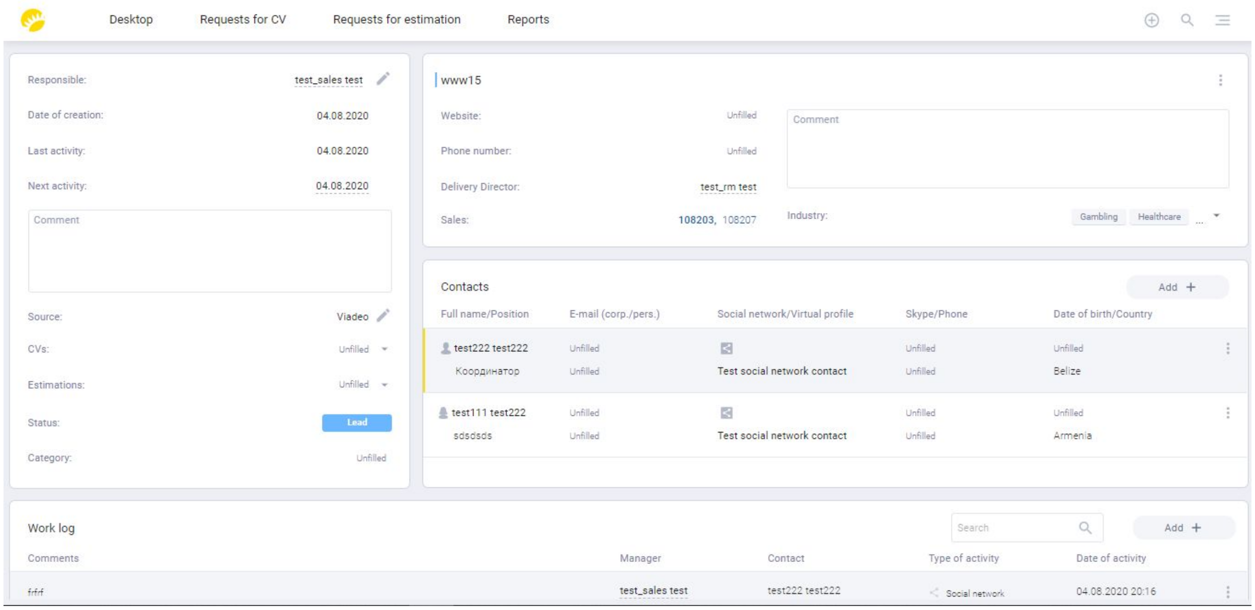
E-mail sale

Sale might be created by redirecting mails to the common corporative e-mail. The address ([E-mails and additional e-mails]) mail is coming from must be stored in the system and belong to [Sales] user. Created sale is assigned to the Sales Manager identified by the e-mail.

Edit sale, company and contact

“Sale” page is meant for managing Sale, Company and Contact. User can get on this page:

- after saving the form “ Add sale”;
- by click on the Company link or Sale ID from other pages of the system.



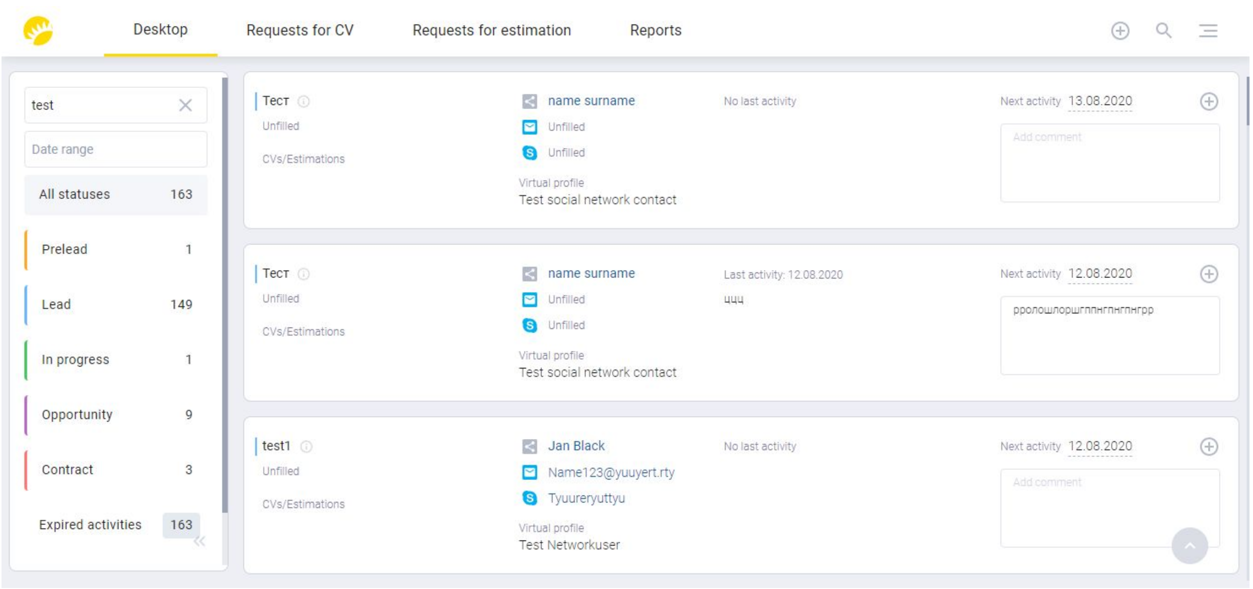
Add and edit activities

Bottom of the [“Sale” page] is a “Work log” tab. Here you can add activities related to the Sale, edit them, view and delete.

“Desktop” page

The page is available only for Sales. Authorized user can successfully perform his main activities concerning the sales he is Responsible for. *Side bar* with applicable filters helps to select the sales according to statuses, last activities date range and so on.

Sale block depicts basic information about the sale. Here one can add activity as well.



Auto assignment of sales

The system has a unique feature that helps to automate the process of a fare and even leads distribution among Sales Managers. Import sales, Express-sales or any other sale with CRM Bot assigned as Responsible get into one of auto distributions:

- General day distribution (during working hours on weekdays), participants are selected by Admin on the “Users” page ;
- General night distribution (during non-working hours and on weekends), participants are selected by Admin on the “Users” page;
- Regional distribution among regional Sales Managers (24/7).

Each type of distribution implies queue manipulations (evennes, throughbacks) and email notifications.

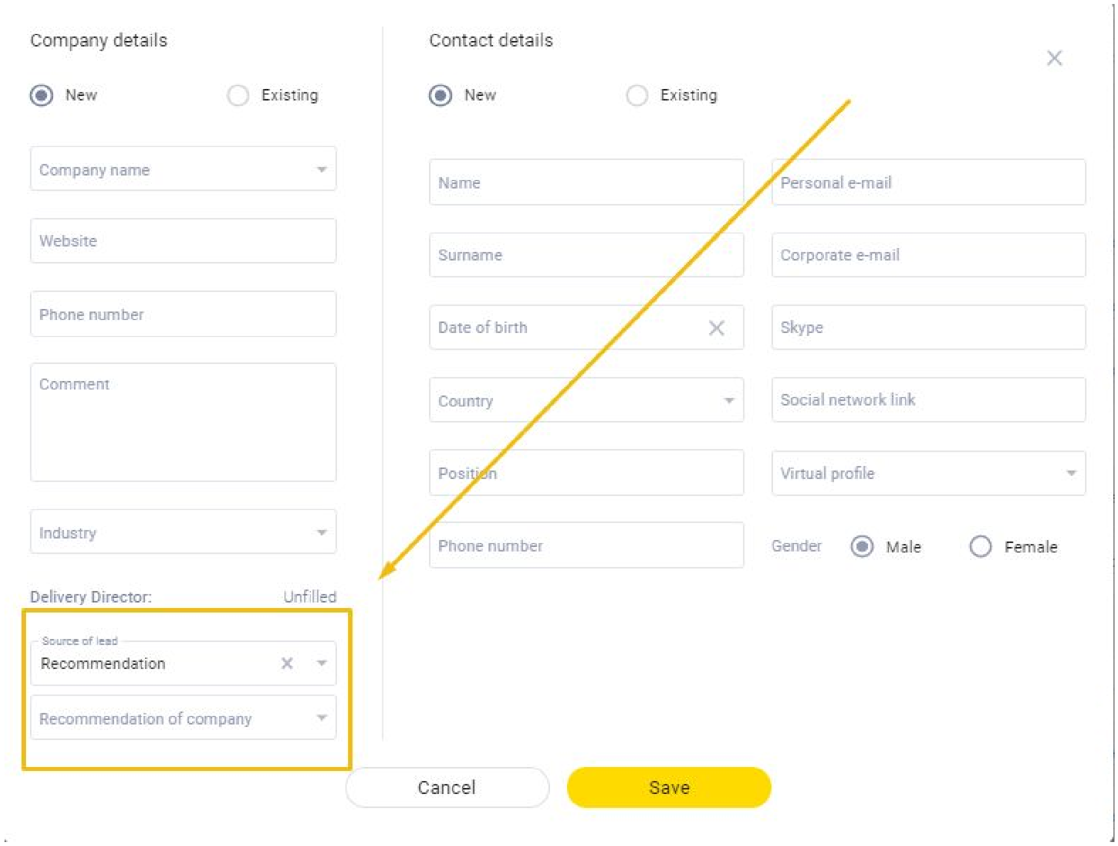
Auto assignment of companies

All companies in the system must have a Delivery Director for optimizing business processes while working with the sale. Delivery Director is assigned automatically when new company is created or a user adds sale to the existing company without Delivery Director.

Delivery Directors are users with [RM role](#) and selected checkbox “Delivery Director” on the on the [“Users” page](#).

The distribution implies queue manipulations (evennes, throughbacks) and email notifications.

Exception! If while [adding sale](#) to the company_1 without Delivery Director user chooses Recommendation as a source of lead and specifies the recommendation company_2 with Delivery Director the system will assign company_1 to the Delivery Director from the company_2.



Requests for CVs

Requests for CVs are coming as a consequence of a deeper communication with a customer.

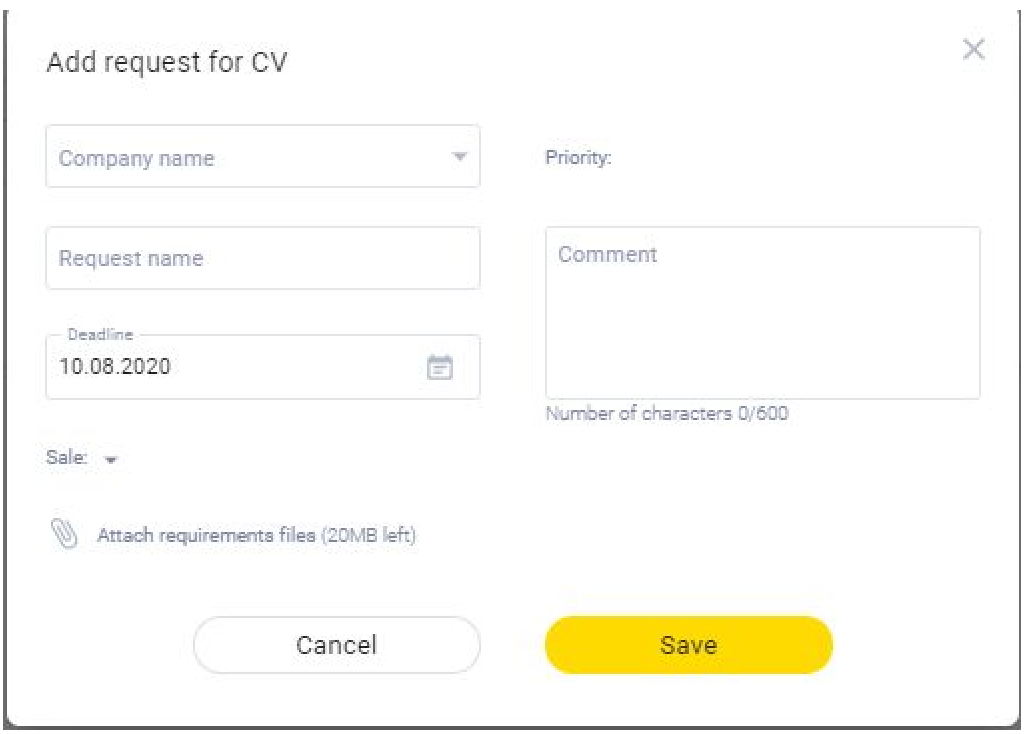
Add request for CV

As soon as sale is created, user can add a CV request and link it to the existing sale.

1. Click on “plus” in header.

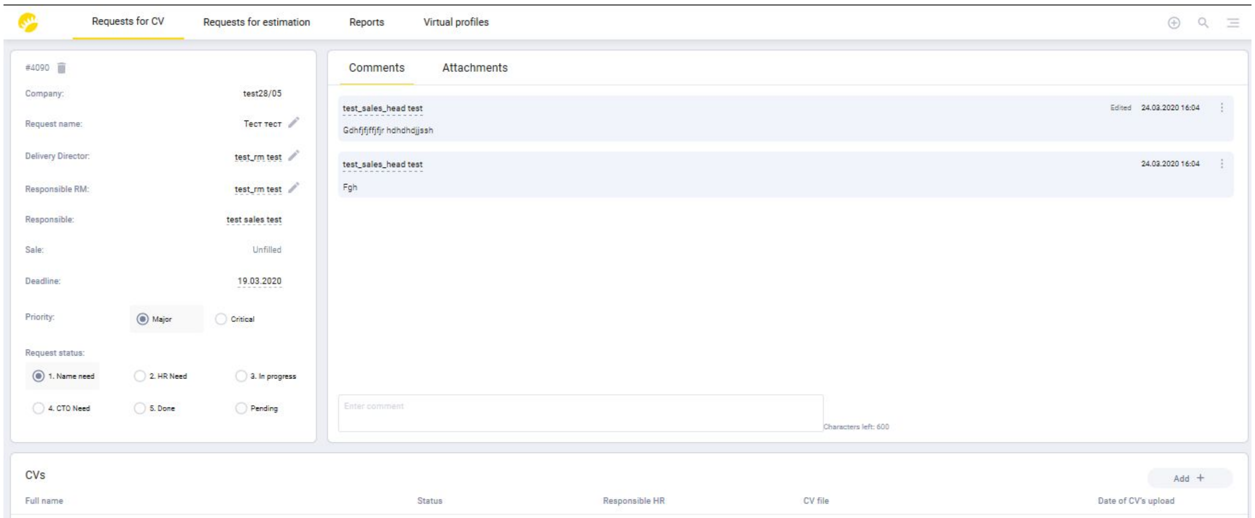
2. Choose “Add request for CV”

3. Fill the form and save it.



Edit request for CV and work with it

When CV request is saved, the system redirects you on the “Request for CV” page. User can get on this page by the link of the request name and id available on other pages of the system as well.

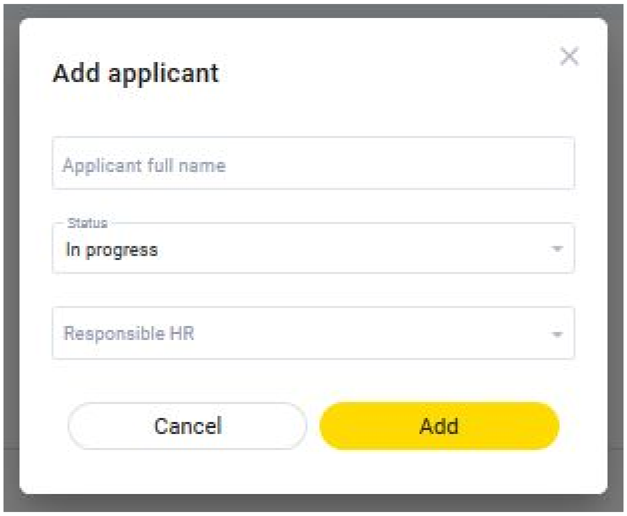


Left bar contains information about the request itself. Different statuses and other fields make it comfortable to move on the business process. Right bar has “Comments” and “Attachements” tabs.

Add, edit and view CVs

Down of the “Request for CV” page is a section of CVs. All related to the requests files and candidates are here. To add CV:

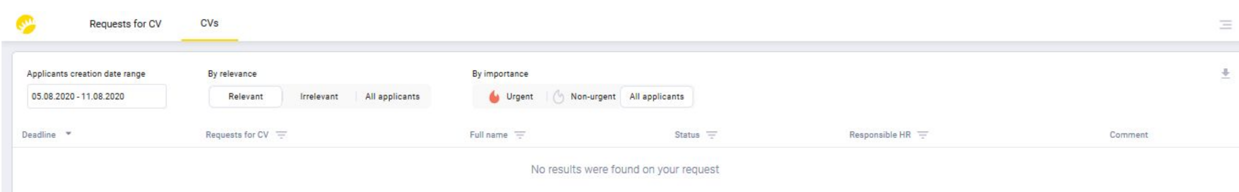
1. Tap on “Add CV” button.



2. Fill the form.

3. Save it.

There is “CVs” page, available for [HR users](). It has a number of extra statuses and other states of the CV, that optimize its processing. User can download the table with set filters.



View all requests for CV

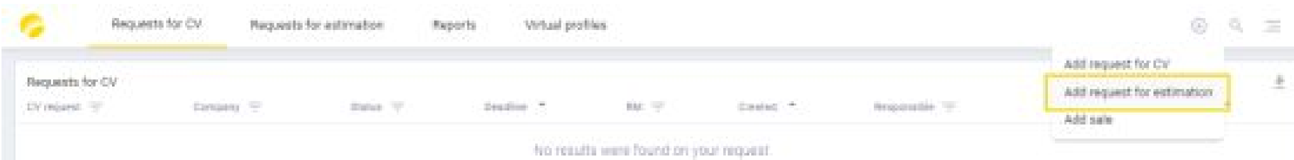
All requests for CVs can be viewed on “Requests for CVs” page.

User can sort and filter data according to his preferences. Downloading with set filters is available for [Sales Head]().

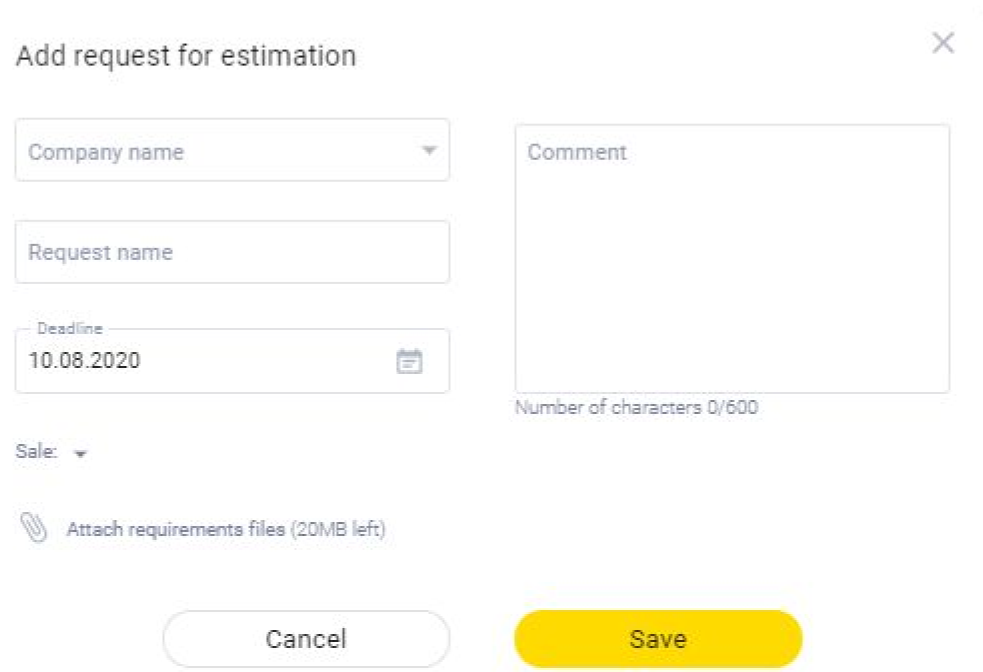
Requests for estimation

Add request for estimation

As soon as sale is created, user can add an estimation request and link it to the existing sale. (Same as request for CV).

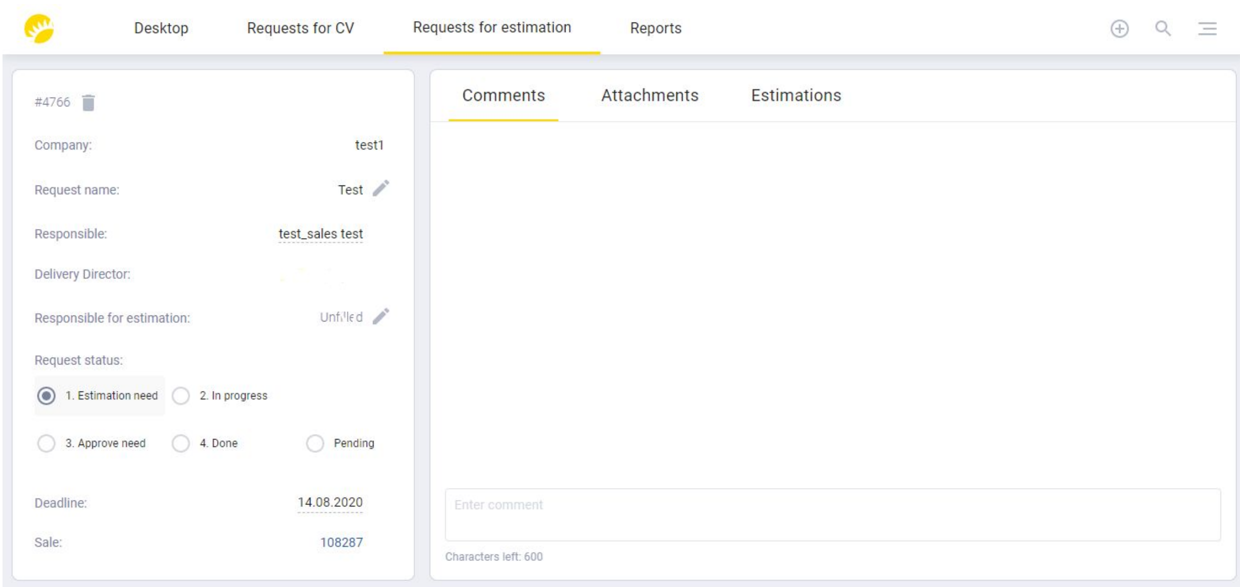


4.Click on “plus” in header.
5.Choose “Add request for estimation”
6.Fill the form and save it.



Edit request for estimation and work with it

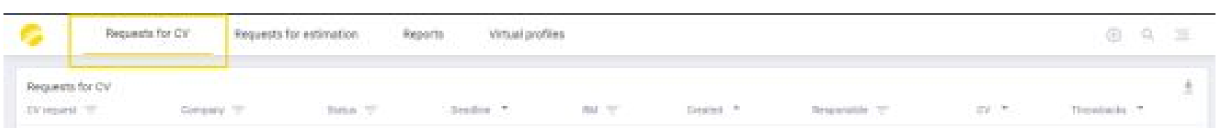
When estimation request is saved, the system redirects you on the “Request for estimation” page. User can get on this page by the link of the request name and id available on other pages of the system as well.



Left bar contains information about the request itself. Different statuses and other fields make it comfortable to move on the business process. Right bar has “Comments”,“Attachements” and “Estimations” tabs.

View all requests for estimation

All requests for estimations can be viewed on “Requests for estimations” page.

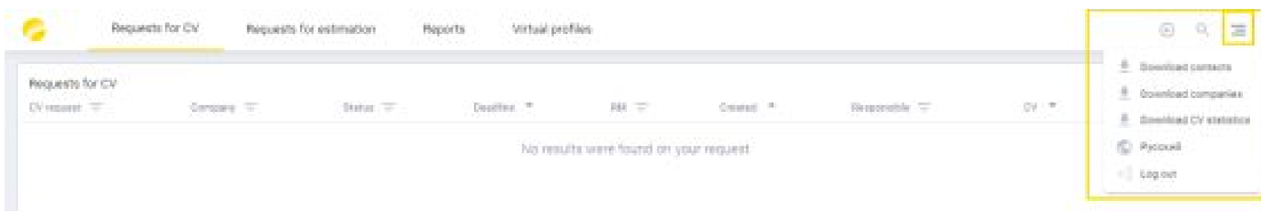


User can sort and filter data according to his preferences. Downloading with set filters is available for [Sales Head](#).

Downloads

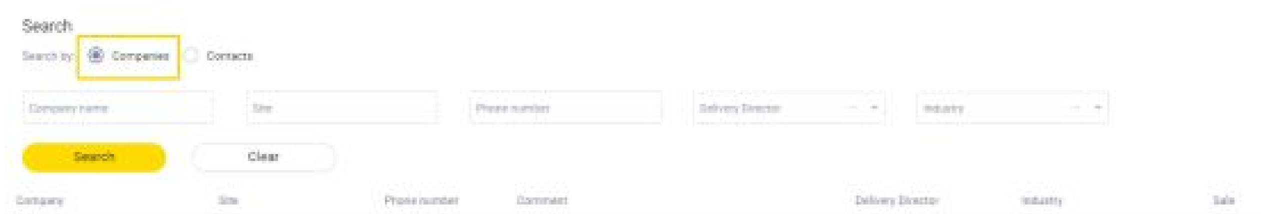
As a [Sales Head]() one can export all companies and all contacts from the system or set date range and take out the items, created for the required period. Statistics for CVs is available here as well. It helps to monitor the process of working with CVs of employees being sold. The report tells about the speed of proceeding the CV through statuses.

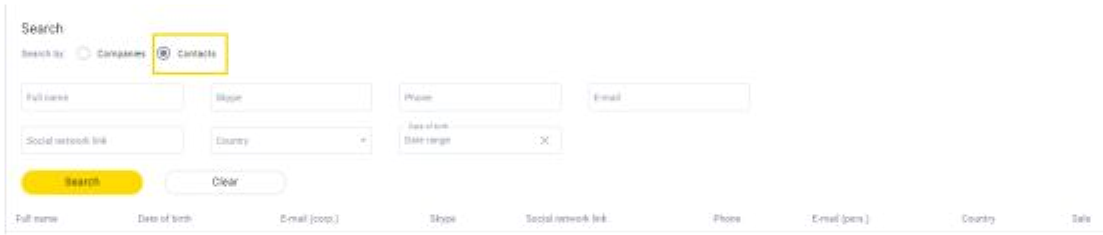
Tap on burger menu in header and choose one of the options for downloading.



Search

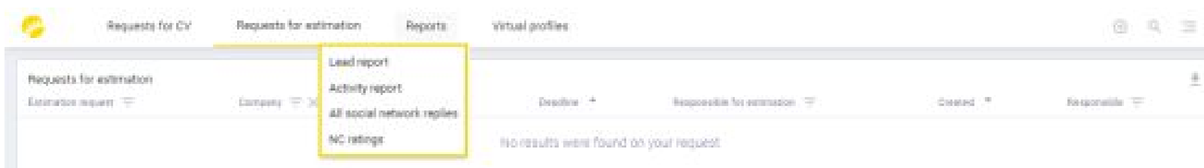
The system is designed for easy and quick navigation amongst innumerable companies and contacts. Global search has two options: search by companies and search by contacts. Thus user can quickly find or sort out the required group of contacts or companies according to preset filters supplied on this page for each of the options.



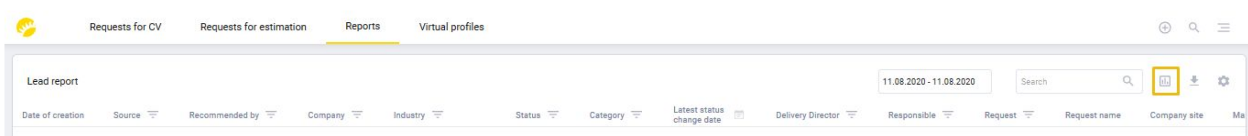


Reports

As a [Sales Head](#) user can analyze sales and activities, keep an eye on the the quality of employees work due to the reports supplied in the system.

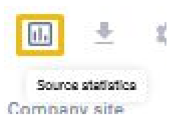


Lead report



Lead report is meant for controlling sales. As a [Sales](#), user can observe only his leads. [Sales Head](#) monitors all sales in the system.

Except the report itself, user can get Source statistics per period on this page by clicking on the

icon 

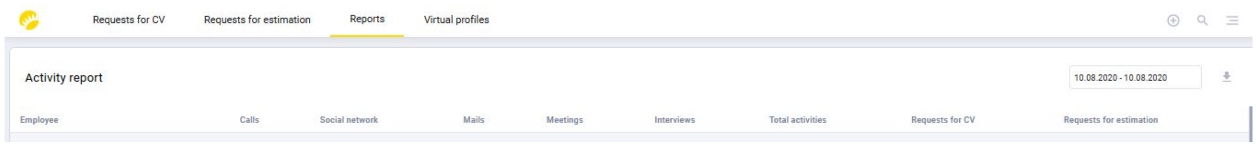
above the table.

Source statistics per period

Sources	Number of Leads
Angel	0
E-mail	0
E-mail 2	0
E-mail vacancies	0
LinkedIn	0
Personal contact	0
Recommendation	0
Site	0
Site vacancies	0
Viadeo	0
Xing	0
test1	0
Total:	0

Activity report

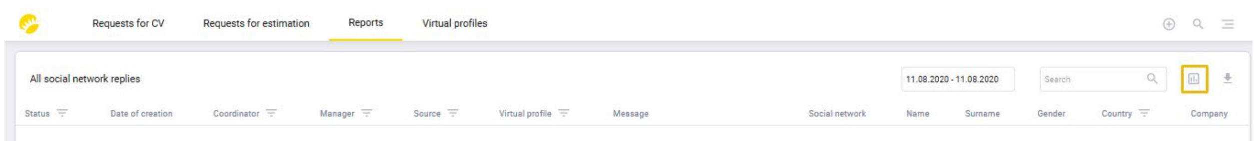
The report helps to observe Sales Mangers achievements. All their activities are visible here. Every weekday Sales Heads get daily Activity report on their e-mails.



Downloading the report with set filters is available.

All social network replies

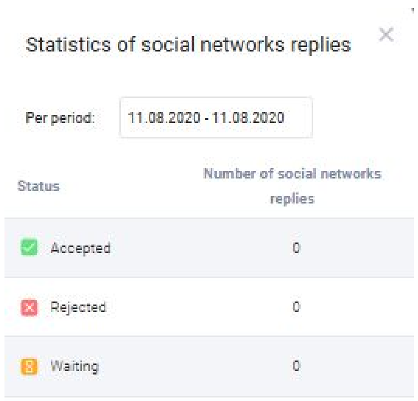
All social network replies with all available statuses are contained in this report in order to keep an eye on the process of proceeding the replies by Sales Managers.



Downloading the report with set filters is available.

One can check *statistics of social networks* replies by tapping on 

the icon.



NC ratings

The report is meant for monitoring achievements of Network Coordinators.

Sales Head can download and choose date range. Network Coordinator can only view current month report.