



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 successfully 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 employees work due to the reports supplied,
- 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.

CRM Users								
Login	Role	Skype	Telegram	Position	Time zone	Status	Additional info	
test13	Sales	Unfilled	test	Unfilled	UTC+3:00 (Moscow-Minsk)	Active	Unfilled	⋮
test5	RM	Unfilled	test12	director	UTC+3:00 (Moscow-Minsk)	Active	Un	⋮
remove1c	RM	Unfilled	test11	director	UTC+3:00 (Moscow-Minsk)	Active	fff	⋮

Unfilled ⋮

Change password

Edit

Activities

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.

Add user

In cases of using corporate email, a new user will be able to log in using Kerio Andersen's corporate username and password.

E-mail *

Roles

Position

Additional E-mail 0

Mentor

Timezone UTC+3:00 (Moscow-Minsk)

Login

Skype

Comment

Name *

Telegram @username

Surname *

Active

Cancel

Save

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”.

Users

← User activities [test13 test10](#)

05.08.2020 - 05.08.2020 Search

Activity date	Type of activity	Company	Contact	Comment
---------------	------------------	---------	---------	---------

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.

Form for social network replies

Company name (dropdown) Name Date of birth (optional field)

Industry (dropdown) Surname Corporate e-mail (optional field)

Our virtual profile (dropdown) Country (dropdown) Personal e-mail (optional field)

Message Position Phone number (optional field)

Social network link Skype (optional field)

Gender ☒ Male ☐ Female

Send

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

Virtual profiles	Social Network	Sales	Network Coordinator
A911	x1233	Sun Flower	test111 test111



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

	Date of creation	Message	Social network	Virtual profile	Coordinator	Sources	Name	Surname	Date of birth
⋮	20.03.2020 09:52	3	✉	огонь	test user		Test	Test	Unfilled
⋮	04.03.2020 14:05	Выфыф	✉	огонь	test user		test2	КОНТАКТ	Unfilled
⋮	04.03.2020 11:59	new1505_4new1505_4 лоырапплаыриплгыанөмп word word word word word Show more ▾	✉	Test Networkuser	test user		test2	КОНТАКТ	Unfilled

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.

	Date of creation	Message
⋮	20.03.2020 09:52	3
⋮	04.03.2020 14:05	Выфыф
⋮	04.03.2020 11:59	new1505_4new1505_4 лоырапплаыриплгыанөмп word word word word word Show more ▾
⋮	20 11:59	21
⋮	20 11:57	12



“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.



Fill the form

Name

E-mail

Phone

Country*

Comment

Save

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.

The screenshot shows the 'Sale' page interface. The left sidebar contains form fields for 'Responsible' (test_sales test), 'Date of creation' (04.08.2020), 'Last activity' (04.08.2020), 'Next activity' (04.08.2020), 'Comment' (text area), 'Source' (Viadeo), 'CVs' (Unfilled), 'Estimations' (Unfilled), 'Status' (Lead), and 'Category' (Unfilled). The main content area has a header 'www15' and fields for 'Website' (Unfilled), 'Phone number' (Unfilled), 'Delivery Director' (test_rm test), 'Sales' (108203, 108207), 'Industry' (Gambling, Healthcare), and a 'Comment' text area. Below these is a 'Contacts' table with columns: Full name/Position, E-mail (corp./pers.), Social network/Virtual profile, Skype/Phone, and Date of birth/Country. The table contains two rows of test data. At the bottom is a 'Work log' section with a table of activities, including columns for Comments, Manager, Contact, Type of activity, and Date of activity.

Full name/Position	E-mail (corp./pers.)	Social network/Virtual profile	Skype/Phone	Date of birth/Country
test222 test222 Координатор	Unfilled	Test social network contact	Unfilled	Unfilled Belize
test111 test222 sdsdsds	Unfilled	Test social network contact	Unfilled	Unfilled Armenia

Comments	Manager	Contact	Type of activity	Date of activity
tttt	test_sales test	test222 test222	Social network	04.08.2020 20:16

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.

The screenshot displays the 'Desktop' page of a CRM system. The top navigation bar includes tabs for 'Desktop', 'Requests for CV', 'Requests for estimation', and 'Reports'. The sidebar on the left contains a search bar with 'test' and a 'Date range' filter. Below these are status filters: 'All statuses' (163), 'Prelead' (1), 'Lead' (149), 'In progress' (1), 'Opportunity' (9), 'Contract' (3), and 'Expired activities' (163). The main content area shows three sale blocks. Each block displays the sale name (e.g., 'Tect', 'Tect1'), status (e.g., 'Unfilled'), and activity details (e.g., 'No last activity', 'Next activity: 13.08.2020'). Each block also has an 'Add comment' button.

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.

The image shows a web form with two main sections: 'Company details' and 'Contact details'. The 'Company details' section has radio buttons for 'New' (selected) and 'Existing', followed by fields for 'Company name', 'Website', 'Phone number', 'Comment', and 'Industry'. The 'Contact details' section also has 'New' (selected) and 'Existing' radio buttons, followed by fields for 'Name', 'Surname', 'Date of birth', 'Country', 'Position', 'Phone number', 'Personal e-mail', 'Corporate e-mail', 'Skype', 'Social network link', and 'Virtual profile'. At the bottom of the 'Company details' section, there is a 'Delivery Director' status set to 'Unfilled'. Below this, a 'Source of lead' dropdown menu is open, showing 'Recommendation' as the selected option. A yellow arrow points from this dropdown to the 'Save' button at the bottom right of the form.



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.

Add request for CV [X]

Company name [v]

Request name

Deadline: 10.08.2020 [calendar icon]

Priority:

Comment [text area]
Number of characters 0/600

Sale: [v]

Attach requirements files (20MB left)

Cancel Save



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.

The screenshot shows the 'Requests for CV' page. The left sidebar contains form fields for request details: Company (test28/05), Request name (Tech nect), Delivery Director (test_rm test), Responsible RM (test_rm test), Responsible (test sales test), Sale (Unfilled), Deadline (19.03.2020), Priority (Major), and Request status (1. Name need). The right sidebar has tabs for 'Comments' and 'Attachments', with a text input field for comments and a character count. At the bottom, there is a table header for 'CVs' with columns for 'Full name', 'Status', 'Responsible HR', 'CV file', and 'Date of CV's upload', and an 'Add +' button.

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.

Add request for estimation

Company name

Request name

Deadline
10.08.2020

Comment

Number of characters 0/600

Sale:

Attach requirements files (20MB left)

Cancel

Save



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.

The screenshot shows a web application interface with a top navigation bar containing 'Desktop', 'Requests for CV', 'Requests for estimation' (highlighted), and 'Reports'. On the right side of the navigation bar are icons for a plus sign, search, and a menu. The main content area is divided into two sections. The left section is a form for editing a request, with fields for: '#4766' (with a trash icon), 'Company:' (value: test1), 'Request name:' (value: Test, with an edit icon), 'Responsible:' (value: test_sales test), 'Delivery Director:' (value: Unfiled, with an edit icon), 'Request status:' (radio buttons for '1. Estimation need' (selected), '2. In progress', '3. Approve need', '4. Done', and 'Pending'), 'Deadline:' (value: 14.08.2020), and 'Sale:' (value: 108287). The right section has three tabs: 'Comments' (selected), 'Attachments', and 'Estimations'. Below the 'Comments' tab is a text input field with the placeholder 'Enter comment' and a character count 'Characters left: 600'.

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”, “Attachments” and “Estimations” tabs.

View all requests for estimation

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

The screenshot shows the 'Requests for estimation' page. The top navigation bar is the same as in the previous screenshot. The main content area has a table with the following columns: 'CV request', 'Company', 'Status', 'Deadline', 'RM', 'Created', 'Responsible', 'CV', and 'Thresholds'. The table is currently empty.

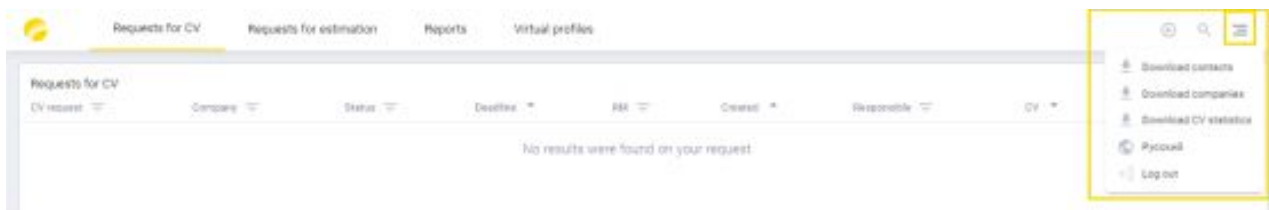
User can sort and filter data according to his preferences. Downloading with set filters is available for [Sales Head](#).



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.

Search

Search by: ☒ Companies ☐ Contacts

Company name: Size: Phone number: Delivery Director: Industry:

Company	Size	Phone number	Comment	Delivery Director	Industry	Sale
---------	------	--------------	---------	-------------------	----------	------

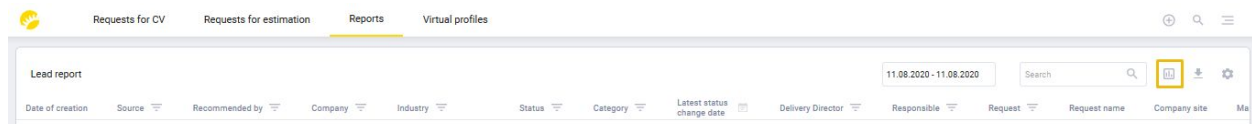


Reports

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.

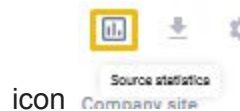


Lead report



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

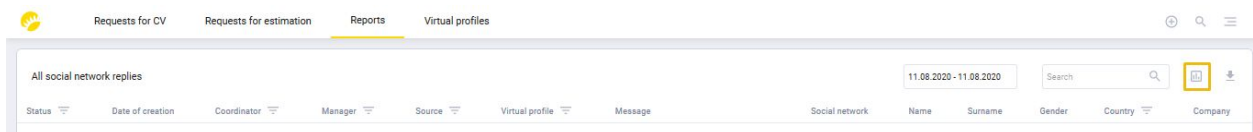
The report helps to observe [Sales](#) Mangers achievements. All their activities are visible here. Every weekday [Sales Heads](#) get daily Activity report on their e-mails.



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.



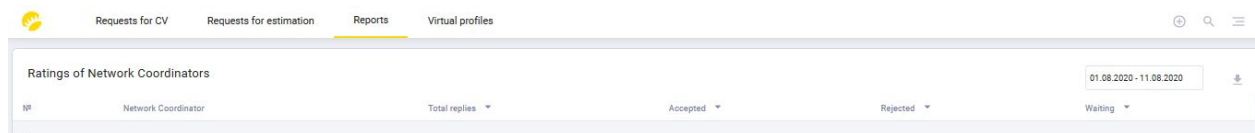
One can check *statistics of social networks* replies by tapping on the icon.

Statistics of social networks replies	
Per period: 11.08.2020 - 11.08.2020	
Status	Number of social networks replies
Accepted	0
Rejected	0
Waiting	0



NC ratings

The report is meant for monitoring achievements of Network Coordinators.



NR	Network Coordinator	Total replies	Accepted	Rejected	Waiting
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[Sales Head](#) can download and choose date range. [Network Coordinator](#) can only view current month report.