

**Universidad Politécnica de Aguascalientes**

Ingeniería en Sistemas Estratégicos de Información.

**CRM in Dolibarr.**

*Name:* Rosa Lizeth Estrada Ortega.

*Teacher:* Luis Humberto Cruz Aguilar.

*Group:* ISEI07A

*ID:* up170043

*Class:* Information Systems

Aguascalientes, Ags, March 17, 2020

**1.Who are they?** **The job is**

In the *Nombre del tercero* field of the *Tercero* module and with the Client type, the Professional ID can be known if it is a Natural or Moral Person, also the Type of third party, number of employees and share capital (companies)

**2. Where do they live?**

The full address is shown in the *direcciones/contactos/listado* tab of the *Terceros* module

**3. What do they do for a living?**

The *puesto de trabajo* is within *of direcciones/contactos/listado* of *terceros* module, the position of the Tercerois shown

**4. How busy are they?**

Cannot be viewed directly, but a note can be used as a description of your hours or workloads

**5. What do they do in their free time?**

It cannot be viewed directly, but a note can be used as a description of your free-time activities.

**6. What is your purchase process?**

In the *Comercial* module in the *clientes/nuevo pedido* tab, the order for the customer is created as well as order orders to later validate and manage the payments that are created, here the payment conditions are shown, the payment method and the shipping method.

**7. When and where do they buy?**

A purchase can be made at any time within company hours and orders can be made via mail, fax, e-mail, telephone, online

**8. What else do they buy?**

In the *Comercial* module in the section on *pedidos a clientes*, filtering by third parties you can access all the purchase orders made by the third party

**9. How much do they pay for the product and / or service?**

In the *Productos/Servicios* tab, listing the products or services that you want to know, within the tab is the *Precio de Venta* tab, in which the price for which customers will pay for the product or service is disclosed.

**10.How often do they buy?**

In the *Presupuesto* tab of the *Comercial* module, in the *Estadísticas* field you can see the purchase frequency

**11.What communication channels do they have access to?**

Internet, Sponsor, mail campaign, fax campaign, Telephone campaign, commercial contact, store contact, employee and partner.

**12.Is there anyone who affects the purchase of the product and / or service?**

In *Contactos/Direcciones* of *the Tercero* tab you can see the detailed list of contacts that can intervene or to whom a purchase is specifically directed.

**13.Who is that person?**

Here we have access to the person's data such as: surname, job title, address, personal telephone number and date of birth

**14.What is the use process?**

In the Gantt chart of the *Proyectos* module

**15.What external factors affect the use of the product / or service?**

External factors are in the *Descripción* field in the *Intervenciones* section in the *Comercial* module

**16.When do they use the product / or service?**

In the *Estadísticas* section of the *productos/Servicio* module we can view this information

**17.How often do they use the product / or service?**

In the *Estadísticas* section of the *productos/Servicio* module we can see how often they use the product.

**18.Where do they use the product / or service?**

In the *Estadísticas* section of the *productos/Servicios* module we can see where the product is used.