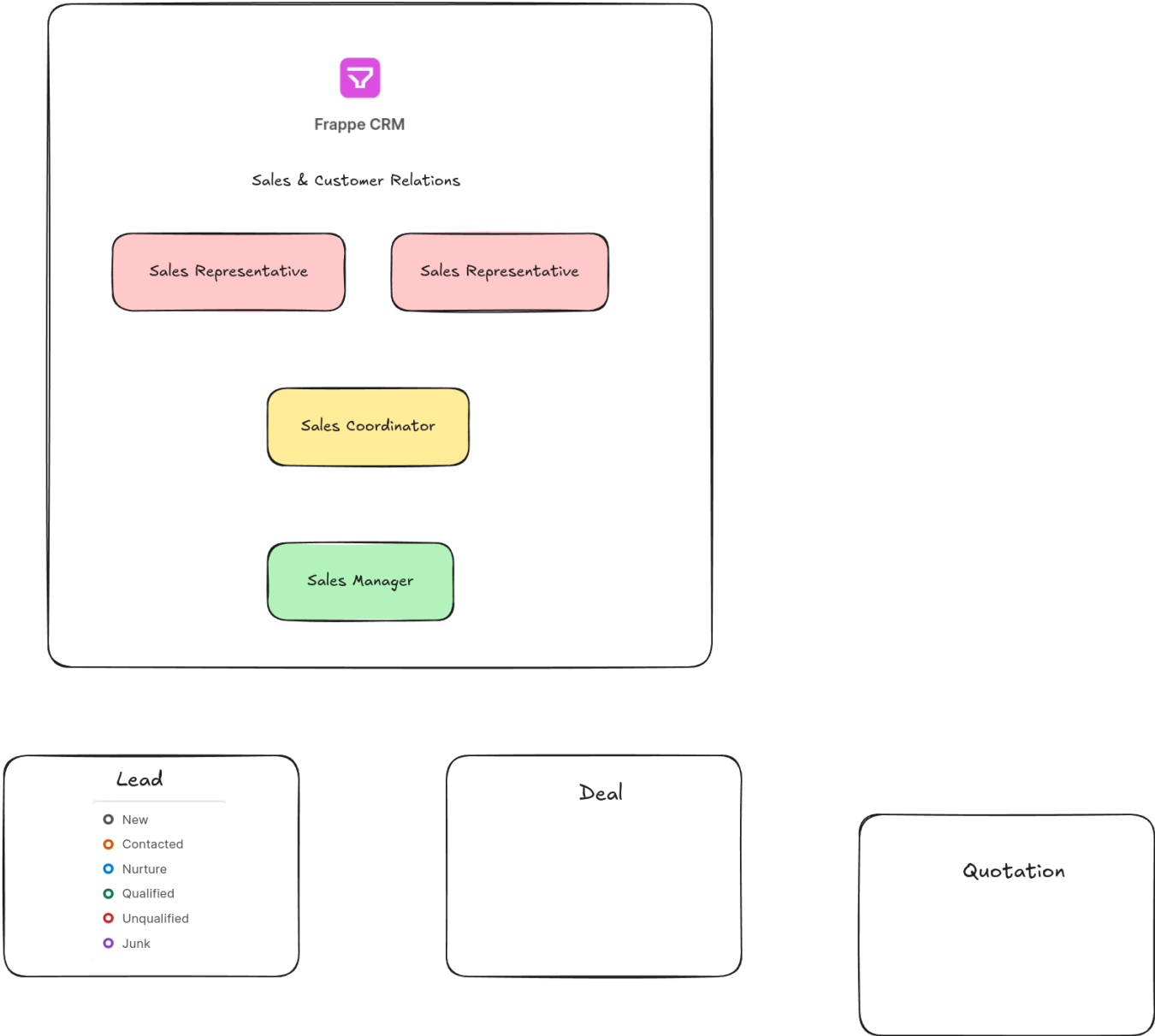# CRM Application

- [Docs](#)
- [Installation](#)
- [The Flow](#)

The Sales Representative will initiate the process.

Lead

Sources:

- Existing Customer
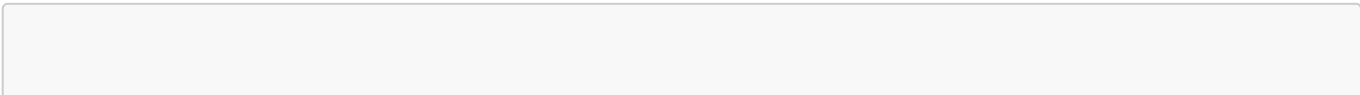- Advertisements

---

There are 2 ways to implement this.

CRM within ERPNext

- Video reference

Implementation:

Containerised

- Using Frappe Docker

```
git clone https://github.com/frappe/frappe_docker
cd frappe_docker
docker compose -f pwd.yml up -d
```

After a couple of minutes, site should be accessible on your localhost port: 8080. Use below default login credentials to access the site.

- Username: Administrator
- Password: admin

Check status:

```
docker compose -f pwd.yml logs -f create-site
```

Proceeding with ERPNext CRM

First let's make sure that we have our Users and Roles defined correctly.

The Flow

☰ **CRM**

∨ PUBLIC

◔ CRM

Territory Wise Sales
Last synced just now   ▽   ⋯

No Data

Your Shortcuts

Lead ↗ 1 Open   Opportunity ↗ 0 Assigned   Customer ↗   Sales Analytics ↗

Dashboard ↗
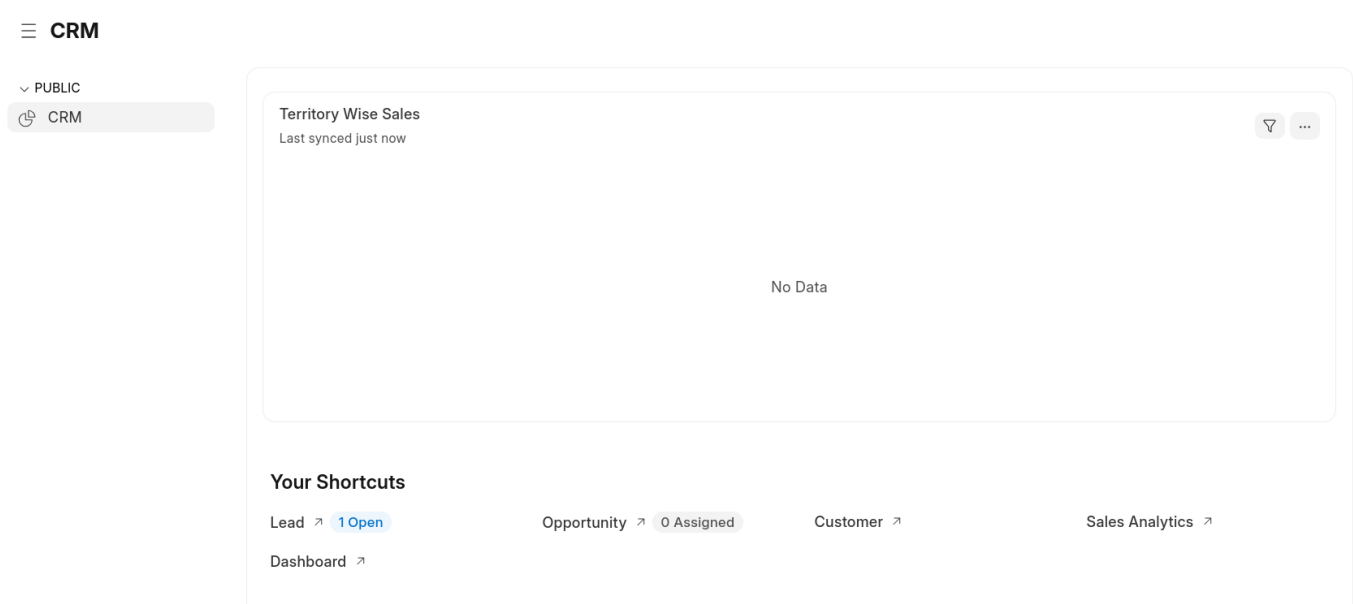
☰ **Lead**   List View ⇕   ⟳   ⋯   + Add Lead

Filter By

Assigned To ⇕

Created By ⇕

Edit Filters

Tags ⇕

Show Tags

Save Filter

Filter Name

ID	Job Title	Open	Organization Nam		Filter ×	Last Updated On
Territory	Title					

	Title	Status	Job Title	Organization ...	Territory	ID	1 of 1 ♡
☐	The Big O Company	Open	Owner	The Big O Co...		CRM-LEAD-2...	AD 4 h ⚲ 0 · ♡

☰ **The Big O Company** Open   Create ⇕   Action ⇕   ‹   ›   🖨   ⋯   Save

TB

Details   Activities   Notes   Connections

👤 Assigned To   +

AD

🔗 Attachments   +

📄 i2d2ykY.png   ×

🏷 Tags   +

👤 Share   +

♡ 0 · ⚲ 0   FOLLOW

Administrator last edited
this · 4 hours ago

Atul D created this · 5
hours ago

Salutation	Full Name	Lead Owner
Mr	Mr Atul	atul@raj.com

First Name	Job Title	Status *
Atul	Owner	Open

Middle Name	Gender	Lead Type
	Male	Client

Last Name	Source	Request Type
	Mass Mailing	Product Enquiry

Contact Info

Email	Mobile No	Phone
atul@ra.com	9876543211	

Website	WhatsApp	Phone Ext.
atul.thebigocommunity.org		

Organization

Organization Name	Annual Revenue	Territory

Create ⇕   Action ⇕   ‹

Customer

Opportunity

Quotation

Prospect

≡ **The Big O Company** Open   Create ⇅   Close   ‹   ›   🖨   ⋯   **Save**

Details   Contacts   Items   Activities   Comments   Connections

Opportunity From *   Opportunity Type   Sales Stage
Lead   Sales   Prospecting

Lead *   Source   Expected Closing Date
CRM-LEAD-2025-00001   Mass Mailing

Status *   Opportunity Owner   Probability (%)
Open   ⇅   atul@raj.com   100.000

Organization

No of Employees   Industry   City
1-10   ⇅

Annual Revenue   Market Segment   State
0.00

                                    Website   Country
                                    atul.thebigocommunity.org   United Arab Emirates

                                                                     Territory

Create ⇅   Close   ‹   ›   🖨   ⋯   **Save**

Supplier Quotation

Request For Quotation

Customer

Quotation

Expected Closing Date

Probability (%)

☰ **New Quotation** Not Saved   Get Items From ⇕   ⋯   S̲ave

Details   Address & Contact   Terms   More Info

Series *
SAL-QTN-.YYYY.-   ⇕

Date *
27-05-2025

Order Type *
Sales   ⇕

Quotation To *
Lead

Valid Till
27-06-2025

Lead *
CRM-LEAD-2025-00001

Customer Name
The Big O Company

Currency and Price List ⌄

Scan Barcode
[⛶]

Items

☐	No.	Item Code	Quantity *	Rate (AED)	Amount (AED)	⚙
☐	1	Item Code	Quantity	Rate (AED)	Amount (AED)	✎

Add Row Add Multiple   Download   Upload

Manual

- Directly installing into OS

CRM standalone app