

GR8 CRM - Sales/Lead User Interface Plugin

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1. Introduction

GR8 CRM is a set of [Grails Web Application Framework](#) plugins that makes it easy to develop web applications with CRM functionality.

You can find more information about GR8 CRM on the main documentation site <http://gr8crm.github.io>.

1.1. Customer Relationship Management


Customer relationship management (CRM) is a system for managing a company's interactions with current and future customers. It involves using technology to organize, automate and synchronize sales, marketing, customer service, and technical support. [Wikipedia](#)

The GR8 CRM "Ecosystem" currently contains over 40 Grails plugins. For a complete list of plugins see <http://gr8crm.github.io>.

Each GR8 CRM plugin defines a [Bounded Context](#) that focus on one specific domain, for example **contact**, **project** or **document**.

2. Sales/Lead User Interface Plugin

The `crm-sales-ui` plugin provides a Twitter Bootstrap user interface for managing leads and sales opportunities. It depends on the `crm-sales` plugin for low level services and persistence.



```
// Feed your brain
gr8.technologies.each {
  yourBrain << it
}
```

CONTACT OPPORTUNITY ADMINISTRATION - FAVORITES - GR8 CONTACTS -

Test ★ Technipelago AB

Opportunity Roles (2)

Opportunity name	Customer	Status	Contact date
Test	Technipelago AB	Presentation	10/1/15
Project Id	Djurhamn, SE	Probability	Order date
1	Contact	60%	10/14/15
Product	Göran Ehrsson	Value	
Test equipment	Assigned to	EUR50,000	
	Admin	EUR30,000	

Find opportunity

Edit

New opportunity

View

Created October 1, 2015 8:40 AM Last Updated October 1, 2015 8:50 AM

Summary

The deal **Test** with **Technipelago AB** have a potential value of **EUR50,000** and order is expected **October 14, 2015**. Sales rep. is Admin.

TAGS


eu-north

3. CRUD user interface

The plugin provide user interface for creating and updating sales opportunities. It follows the same CRUD workflow as other GR8 CRM -ui plugins.

3.1. Create new sales opportunity

You can create a new sales opportunity from all pages where you can search, list or view opportunities. Just press the [New Opportunity] button and enter information in the create opportunity form.







```
// Feed your brain
gr8.technologies.each {
  yourBrain << it
}
```

CONTACT OPPORTUNITY ADMINISTRATION - FAVORITES - GR8 CONTACTS -

New Opportunity

Opportunity Description

Customer	Opportunity name	Status	Contact date
<input type="text"/>	<input type="text"/>	Interest ▾	10/1/15 
Contact	Product	Probability	Order date
<input type="text"/>	<input type="text"/>	20% ▾	<input type="text"/> 
Assigned to		Value	Delivery date
Admin ▾		<input type="text"/>	<input type="text"/> 
			Archive date
			<input type="text"/> 

✓ Save

3.2. Edit existing sales opportunity

When you view an existing opportunity you can alter information by pressing the [Edit] button.



```
// Feed your brain
gr8.technologies.each {
  yourBrain << it
}
```

[CONTACT](#)[OPPORTUNITY](#)[ADMINISTRATION](#)[FAVORITES](#)[GR8 CONTACTS](#)

Edit Opportunity - Test Technipelago AB

<div>Opportunity</div> <div>Description</div>		
Opportunity name	Status	Contact date
<input type="text" value="Test"/>	<input type="text" value="Presentation"/>	<input type="text" value="10/1/15"/>
Project Id	Probability	Order date
<input type="text" value="1"/>	<input type="text" value="60%"/>	<input type="text" value="10/14/15"/>
Product	Value	Delivery date
<input type="text" value="Test equipment"/>	<input type="text" value="50,000"/>	<input type="text"/>
	Assigned to	Archive date
	<input type="text" value="Admin"/>	<input type="text"/>
<div><input type="button" value="✓ Update"/> <input type="button" value="🗑 Delete"/> <input type="button" value="✕ Cancel"/></div>		

3.3. Find opportunities

The search form have several input fields where you can enter search criteria. When you hit [Search] you will either be presented with a list of matching opportunities or if there is only one match it will be displayed immediately.



```
// Feed your brain
gr8.technologies.each {
  yourBrain << it
}
```

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Find opportunities

Opportunity name <input type="text"/>	Customer <input type="text"/>	Status <input type="text"/>	Contact date <input type="text"/>
Project Id <input type="text"/>	Assigned to <input type="text"/>	Value <input type="text"/>	Order date <input type="text"/>
Product <input type="text"/>		Tags <input type="text"/>	Delivery date <input type="text"/>
			Archive date <input type="text"/>

[Search](#)[New opportunity](#)[Reset](#)

3.4. List opportunities

When you search for opportunities and more than one match you search criteria, a list will displayed where you can select an opportunity to view details.



```
// Feed your brain
gr8.technologies.each {
  yourBrain << it
}
```

[CONTACT](#)[OPPORTUNITY](#)[ADMINISTRATION](#)[FAVORITES](#)[GR8 CONTACTS](#)


Opportunities 2 records found

Customer	Opportunity name	Status	Order date	Value
Technipelago AB	Test	Presentation	10/14/15	EUR50,000
GR8Conf	Conferense swags	Interest	1/20/16	EUR0

[Filters](#)[Export](#)[New opportunity](#)

4. Project Roles

A sales opportunity can have multiple people assigned to different roles. You can specify the project manager that will lead the project, or the sales support staff that are assigned to the project. As an administrator you can add as many role types as you want. These roles can then be used to assign people to the sales opportunity.



```
// Feed your brain
gr8.technologies.each {
  yourBrain << it
}
```

CONTACT OPPORTUNITY ADMINISTRATION- FAVORITES- GR8 CONTACTS-

Test ★ Technipelago AB

Opportunity Roles (4)

Role	Name	Address	Telephone	Email
Customer	Technipelago AB	Djurhamn, SE		info@technipelago.se
Contact	Göran Ehrsson	Djurhamn, SE		goran@technipelag...
Quality Assurance	Søren Berg Glasius	IT-University, Copenhagen, DK		sbglasius@gr8conf...
Project Manager	Stephen Green			

Add role

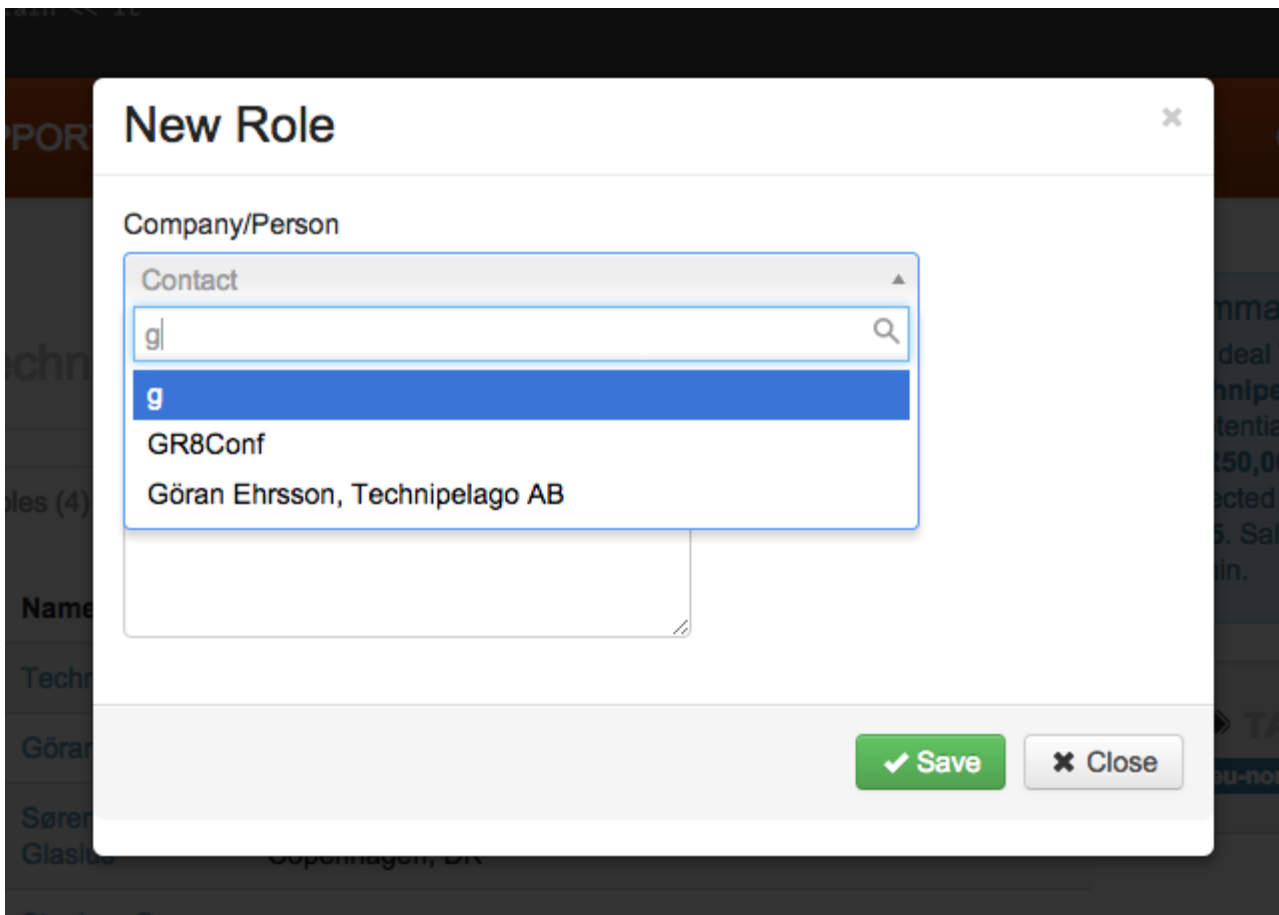
Summary

The deal **Test** with **Technipelago AB** have a potential value of **EUR50,000** and order is expected **October 14, 2015**. Sales rep. is Admin.

TAGS

eu-north

To add a role other than customer and contact you press the [Add role] button on the Roles tab. You can add contacts already in your address book or create a new contact by entering new name. The new contact will be added to your address book when you save the project.



5. Sales staff

When creating or updating a sales project you can select the responsible sales representative from a dropdown list. This dropdown list is populated using an application event `crmTenant.getUsers`. You must add an event listener in one of your application services that listens to this event and returns a list of users (sales staff).

For a list of **all** registered users you can add something like this to a service in your application:


```
@Listener(namespace="crmTenant", topic="getUsers")
def listAllUsersInTenant(data) {
    CrmUserRole.createCriteria().list(sort: 'user.name', order: 'asc') {
        resultTransformer CriteriaSpecification.ALIAS_TO_ENTITY_MAP
        projections {
            user {
                property('id', 'id')
                property('guid', 'guid')
                property('username', 'username')
                property('name', 'name')
                property('email', 'email')
            }
        }
        role {
            eq('tenantId', data.tenant)
        }
    }
}
```

6. Configuration

The `crm-sales-ui` plugin can be configured with the following parameters.

Key	Description	Default value
crm.currency.default	Default currency code when <code>CrmSalesProject.currency</code> is null	"EUR"
crm.sales.probabilities	List of valid probability options (rendered in <code><select></code>)	[0, 0.2, 0.4, 0.6, 0.8, 1]
crm.sales.export.timeout	Timeout (in seconds) waiting for export process to finish	60

7. Changes

2.0.0

First public release

8. License

This plugin is licensed with [Apache License version 2.0](#)

9. Source Code

The source code for this plugin is available at <https://github.com/technipelago/grails-crm-sales-ui>

10. Contributing

Please report [issues](#) or [suggestions](#).

Want to improve the plugin: Fork the [repository](#) and send a pull request.