ELMA CRM+

User Manual

Business Process and Performance
Management System

Contents

Introduction....4

Chapter 1. ELMA CRM+ Application 6

Chapter 2. Implementing a CRM System.... 7

Chapter 3. Contractor and Deal Base 11

3.1. Creating Contractors 13

3.2. Configuring Contractor Pages 15

3.2.1. Configuring Fields 15

3.2.2. Configuring Forms 20

3.2.3. Configuring Objects 26

3.3. Configuring a Sales Funnel 32

3.3.1. Configuring a Deal Page 32

3.3.2. Configuring Deal Objects 34

3.3.3. Sales Funnel. Deal Stages and Types 36

3.3.4. Configuring the Product and Services Object 40

3.4. Search and Filter Contractors and Deals.... 46

3.4.1. Creating Custom Filters 48

3.4.2. Advanced Filter Settings 55

3.4.3. Configuring a Filter Tree 58

3.5. Creating Interfaces for Working with CRM 62

3.5.1. Creating a User Group.... 62

3.5.2. Creating and Setting Up the Main Page.... 64

3.5.3. Configuring Access to a Page.... 69

3.5.4. Configuring the Set of Main Pages 72

Chapter 4. Quick Sales.... 76

4.1. Configuring Object Model.... 78

4.1.1. Configuring Contractors and Deals Forms 78

4.1.2. Starting a Process from a Contractor Page 81

4.1.3. Adding items to CRM Objects 83
4.1.4. Working with the FIAS Address Base 85
4.2. Sales Business Process 91
4.2.1. Creating a Sales Business Process 91
4.2.2. Configuring swimlanes 93
4.2.3. Configuring the Business Process Context 95
4.2.4. Instance Names Generation 100
4.2.5. Displaying Progress on an Order 101
4.3. Document Generation 109
4.3.1. How to Work with Templates 109
4.3.2. Configuring Generate Document Version Activity 111
4.4. Use Cases 115
Chapter 5. Long-cycle Sales 124
5.1. Potential Customers (Leads) 126
5.1.1. Working with Duplicates 130
5.2. Access Permissions 137
5.2.1. Configuring CRM Access Permissions 138
5.2.2. Access to Contractor, Lead and Deal Pages 140
5.2.3. Configuring Categories 141
5.2.4. Configuring Access Permissions to Fields and Properties of CRM Objects 148
5.3. Active Sales Funnel 152
5.4. Configuring Reports 161
5.4.1. Sales Funnel Report 161
5.4.2. Deal Dynamics Report 163
5.4.3. Payments 166
5.4.4. Filters 173
5.5. Use Cases 176
Chapter 6. Integration with IP telephony 188

6.1. Outgoing Calls 189
6.2. Incoming Calls 191
6.3. ELMA-based Customer Service Center 194
Chapter 7. Tracking Marketing Activities 195
7.1. Marketing Objects 197
7.2. Statistics 202
7.3. Working with UTM parameters 204
7.4. Use Case 206
Chapter 8. Roles and Interfaces 212
8.1. Sales Representative 213
8.2. Marketer 215
8.3. Chief Commercial Officer 217
Chapter 9. ELMA CRM+ in IT Infrastructure 220
9.1. Using ELMA CRM+ in Other System Applications 224
Chapter 10. Useful Resources 226

Introduction

This book is a brief guide to the **ELMA CRM+** application built on the basis of the **ELMA BPM Platform**. It is intended for those who want to independently master the ELMA system, as well as for professionals who plan to implement it. The main goal of this book is to give users the basic understanding of how to work with the **ELMA CRM+** application.

This book implies that users already have the basic knowledge of how to work with the ELMA system described in the User Manual on ELMA BPM Platform. It is also assumed that the system has already been prepared for working with the **ELMA CRM+** application: the company organizational structure has been created and users have been added (for more details, see the User Manual on ELMA BPM Platform).

Full list of user manuals on the system:

- User Manual on ELMA BPM Platform
- User Manual on the Web Portal
- User Manual on ELMA ECM+ Application
- User Manual on ELMA Projects+ Application
- User Manual on ELMA KPI Application

The functionality of **ELMA CRM+ application** is described in more detail in the ELMA Help section. Help articles come together with the system delivery, and are always available in the ELMA Knowledge Base.

Solutions to many technical issues are described in the ELMA Knowledge Base. Our specialists are constantly updating it.

This book is a tutorial rather than a reference guide; it introduces users to the main functions and settings of **ELMA CRM+**. Before you start to read this manual, we recommend that you get acquainted with the User Manual on ELMA BPM Platform which gives a basic understanding of the system.

In this guide, you can find an example of how to organize work with a contractor database and make various types of sales. This book will also show you the functions that will make work in the **CRM** section faster and easier.

Chapter 1. ELMA CRM+ Application

CRM stands for Customer Relationship Management. A **CRM system** is a software product that helps manage, organize and plan customer relations. Once the system is implemented, a company can access a standardized contractor and deal database, monitor at any time how effectively the sales department works, view analytics and dashboards, and based on this data develop business strategies.

ELMA CRM+ application is a combination of CRM- and BPM-systems that allows engaging the entire company in the sales process.

With **ELMA CRM+,** you can:

- keep a record of contractors, contacts and potential customers;
- plan events (calls, meetings, letters, tasks);
- plan deals and tracking how active they are;
- plan payments;
- plan marketing campaigns;
- receive analytics and reports;
- use IP-telephony.

The solution helps you create and manage customer base, automate company's business processes, ensure communication across departments to provide better customer experience, and offers tools to track processes at each stage.

Chapter 2. Implementing a CRM System

Some executives believe that once a CRM system is rolled out, the sales level increases sharply. They assume that the CRM system provides sales representatives with convenient tools, schedules, etc., and automatically make them work more efficiently, but this is not so.

The following three aspects are the key to the sales growth (Fig. 1):

- **Sales rep's professionalism.** A sales department employee has to know the product that their company offers, be an expert in the field, and have good sales skills. The greater these competences are, the more loyal customers will be to the sales rep as a person.
- **Sales rep's motivation.** A sales department employee should be financially engaged in their job. Their salary should be based on positioning the individual, or team, on their pay band according to how well they perform.
- **Conditions that the company creates.** It is not just about a convenient workspace, but about the standards of customer services, quality of goods, pricing policy, market position, marketing and sales support for potential customers.

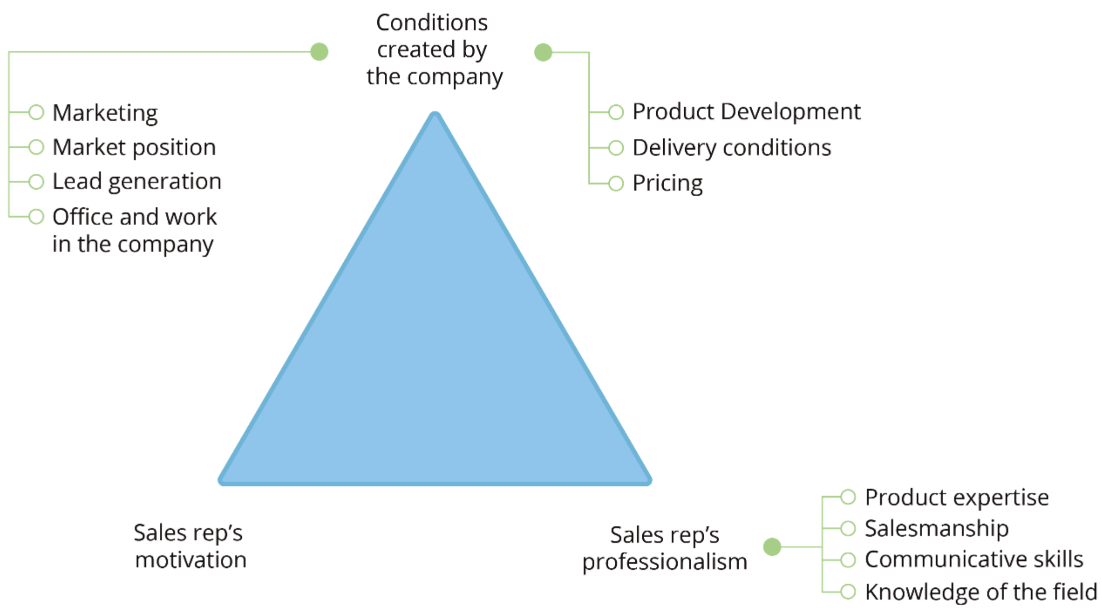


Fig. 1. Key to increasing sales efficiency

Only if all the three conditions are met, a company can increase its sales volume. Remember that a CRM system cannot make a sales rep more competent or change his/her motivation, but it can directly affect the conditions that the company creates.

Consider this example (Fig. 2). Suppose a company supplies metalwork. The sales department has received a call for a $50-thousand bid. A sales rep creates a deal in the CRM system, specifies the customer and the auction time, and plans the next contact with the customer. After that, the rep sends the tender documentation to the supply department requesting the initial cost of the materials described in the technical specification. Two days later, the sales rep doesn't get the information and he/she requests the data again. The supply department employees promise to provide it by the end of the day. The next day, the sales rep gets an incomplete price quote and has to contact the supply department again, but nothing changes. As a result, the company could not submit bids on time and missed the opportunity to conclude the deal.

Fig. 2. Example of a badly organized workflow

This poor internal organization of the company resulted in the failure: there were no clear regulations on providing price quotes and no control over this service. However, if this service were added to a CRM system, the situation would have evolved in another scenario (Fig. 3).

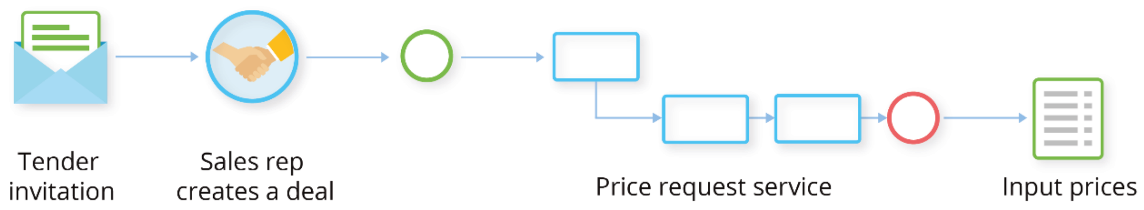


Fig. 3. Example of a well-organized workflow

When a sales rep gets information about a bid, he/she adds a new contractor to the database and creates a deal in the CRM system. The rep doesn't need to meet with the supply department staff to get a price. He/she just starts the business process 'Request Price Quote'. The supply department head receives the request, evaluates the work load of the department employees, redirects the request to the least busy employee and sets the deadline for the task. The responsible executor processes the data and attaches a file with cost estimate. After that the sales rep receives the file. The whole process can be monitored: the representative tracks every stage, and can be sure that he/she will receive the information on time.

There are a lot of examples like that (Fig. 4). While working with a customer, you might need to start sub-processes, generate documents, and involve related departments. Such processes must be carefully described and automated since they are an integral part of the main sales process.

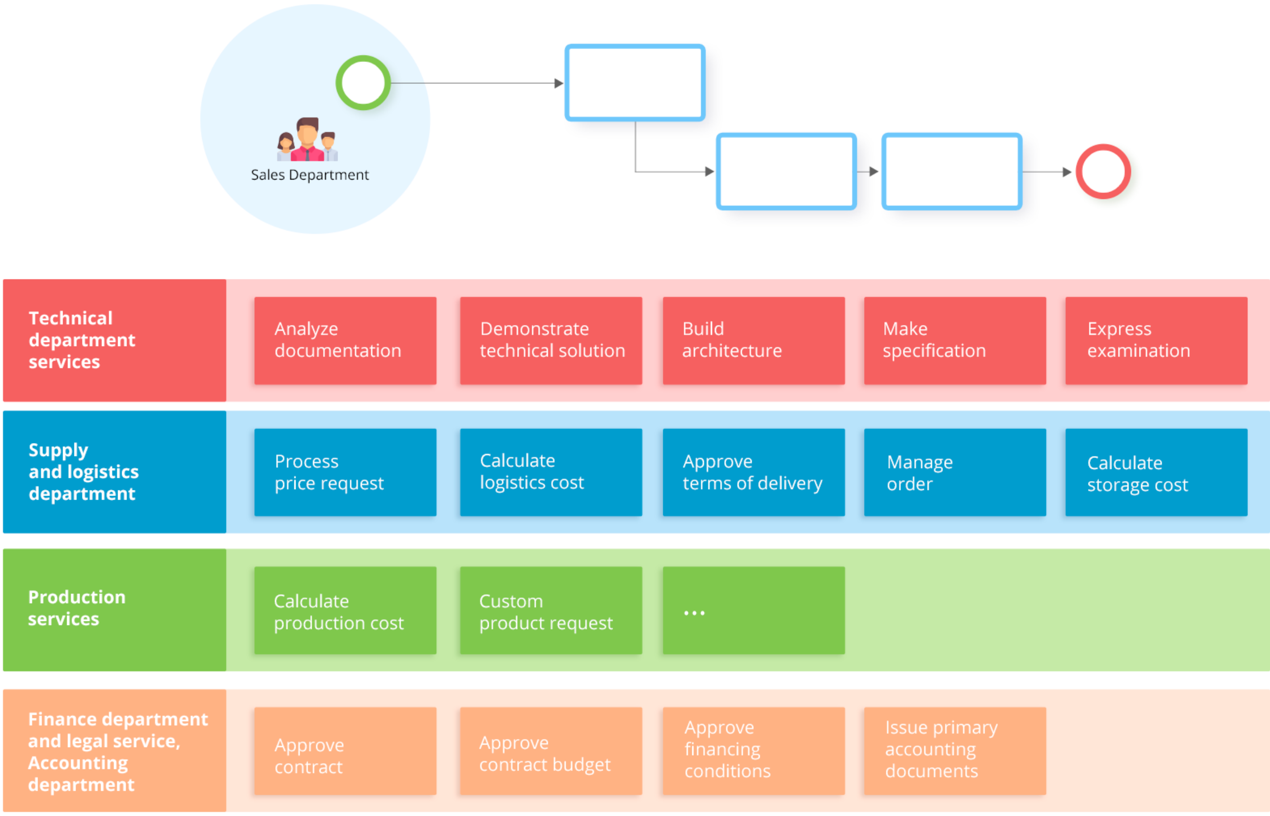


Fig. 4. Examples of business processes that involve all company departments in sales

To summarize, the basic functionality of a CRM system is not enough to increase the sales level. To achieve this goal, you need a process platform that allows automating client interaction processes that are initiated at various stages.

This book describes in with how to use the process approach in quick and long-cycle sales.

Chapter 3. Contractor and Deal Base

One of the primary functions of **ELMA CRM+** is to create a database of all company customers and a track record of working with them.

Let's take as an example a solution for a company producing packaging cardboard. The organization chiefly supplies goods to its regular customers: retail chains, food manufacturers, furniture and engineering factories. This is an example of direct sales.

The company doesn't have many new customers. In each of the three offices, only one employee serves them, whereas others make shipments to regular clients. The company's customers are mostly 'old school' people: they are used to communicating by phone or in person.

There are 4 steps towards a sale:

1. Interest in the product: the product portfolio is sent to the client;
2. Signing the contract: the customer signs a framework agreement with the company;
3. Planning the shipment: the shipment date and address are fixed;
4. Receiving payment.

A CRM system helps the company deal with the following issues:

- when sales reps don't have any customer relationship history record;
- when employees don't stick to meeting time limits and miss shipment deadlines;
- when there is no address base for the delivery of goods;
- when it is impossible to assess the quality of work with new customers.

ELMA CRM+ application gives tools to organize interaction with contractors.

It is supposed that before starting to work with **ELMA CRM+** the ELMA system has already been set up, the organizational structure has been created, and users have been added. To find out more, read User Manual on ELMA BPM Platform and ELMA Help.

Here is an example of an organizational structure (Fig. 5):

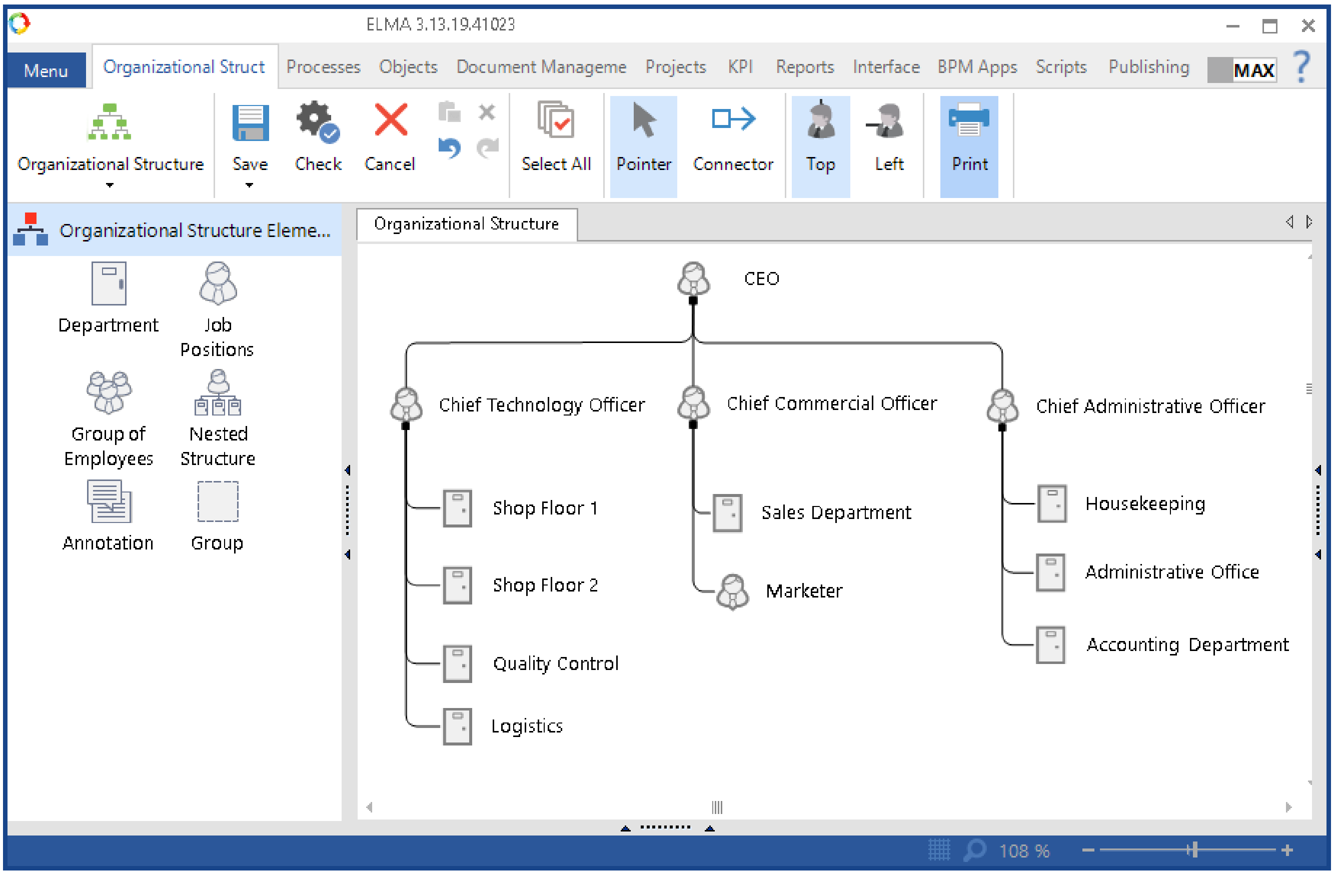


Fig. 5. Organizational chart

In ELMA, you can manage customers in the **CRM** section where you should work in the following order:

1. Configure contractors' pages that will store necessary data.
2. Fill in standard objects with initial data.
3. Configure a sales funnel.
4. Create interfaces and filters.

Contractor pages allow you to store different data about companies, conclude deals and schedule calls and meetings, save the history of actions and keep track of reached agreements.

Now let's take a look at how to create a contractor and add new fields to a contractor page of the **Company** type.

3.1. Creating Contractors

In ELMA, you can create two types of contractors: **Company** and **Individual**. Please note that when you configure the parent **Contractor** object, the changes will be applied both to **Companies** and **Individuals**.

Before working with the contractor base, let's create several contractors using the data in the table (see Table 1).

Table 1. List of data for creating contractors

Name	Type	Industry	Region Group	Type of Business Organization
Totoes	Regular Customer	Footwear	Richmond	Sole Proprietorship
SNACKZY		Food Delivery	Austin	Partnership
PaperBush	Supplier	Papermaking	Birmingham	LLC
HANDCRAFTD	Regular Customer	Retail	New York	LLC

To create contractors, go to **CRM – Contractors** and click **Add – Company/Individual** on the top toolbar (Fig. 6). In our case, choose **Company.** Note that you can work with **Individuals** in exactly the same way.

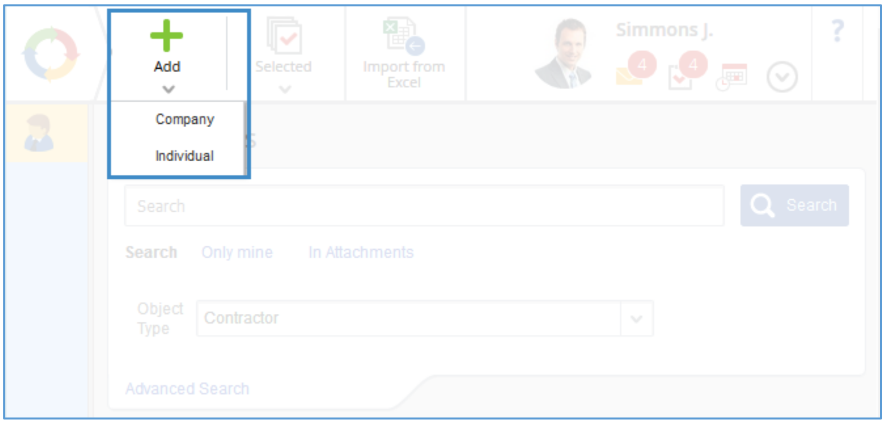


Fig. 6. Creating a contractor. Add – Company/Individual

To find out more about how to create contractors, read the Help page.

When you create a contractor, their page will look like this (Fig. 7):

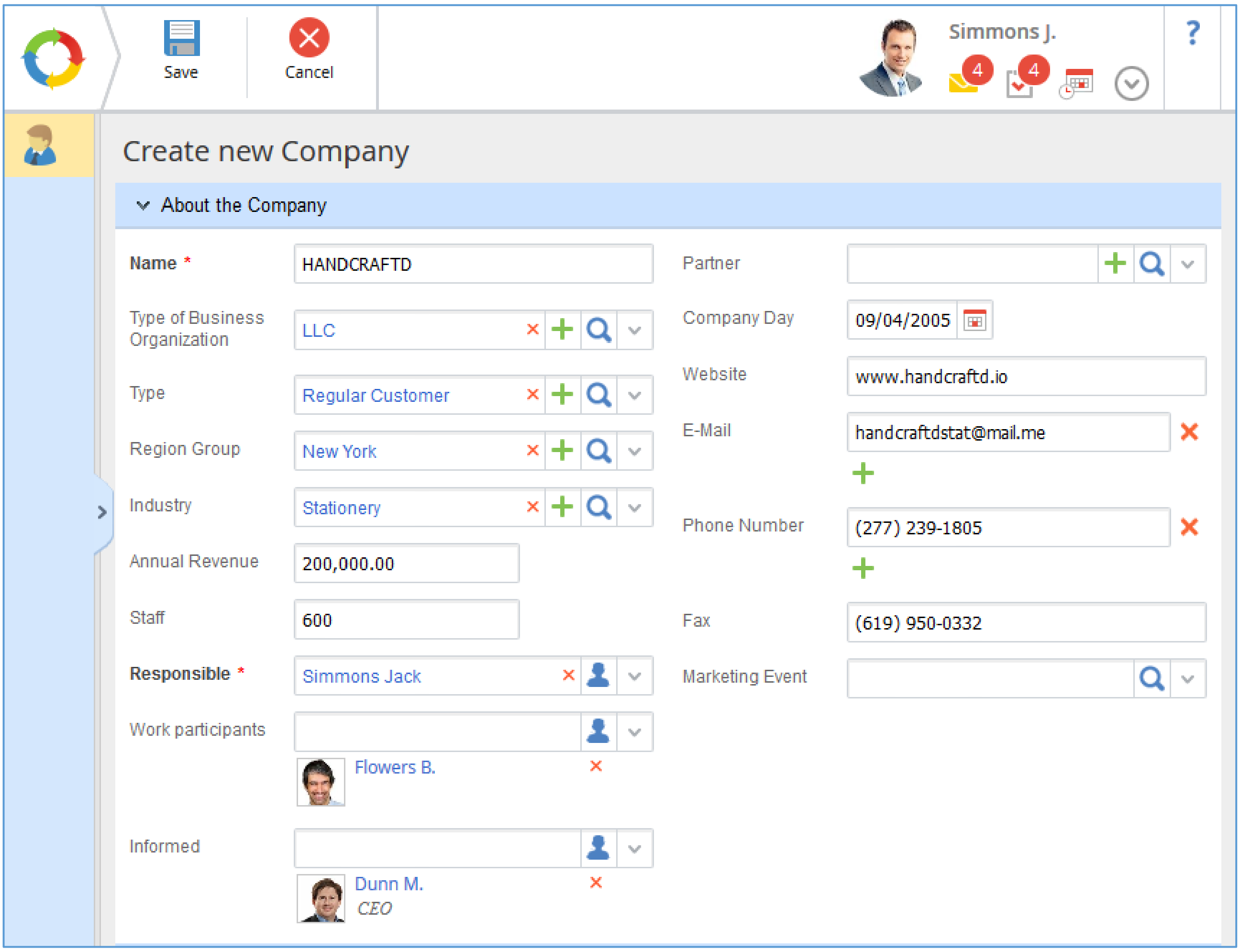


Fig. 7. Contractor page of the Company type

3.2. Configuring Contractor Pages

The first step in configuring the **ELMA CRM+ application** is to customize a contractor object and the display of the contractor page (Fig. 7). The **Contractor** object stores all the information about a company.

We have just taken a look at a **Contractor** page and how to create it, but the standard fields on this page are not enough, so let's add some new ones.

3.2.1. Configuring Fields

In this section, you will find out how to create additional fields.

ELMA objects are extensible: you can easily tailor them to your company's needs. For example, re-group information using additional tabs and panels, add new custom fields. For more details on the object model extension, see this Help Page.

All the objects related to the **ELMA CRM+ application** can be found in the **ELMA Designer** > on the **Objects** tab > in the **CRM** folder. Here you can open a contractor object and configure it. To find out more about the object model extension, see the User Manual on ELMA BPM Platform and the Help section.

As an example, let's extend the **Contractor** type object that stores information about a delivery company. Add new properties and blocks to the **Contractor** object:

- 'Special delivery conditions' property;
- 'Company cars' block with the properties 'cars' and 'registration plate'.

To configure the additional fields, let's edit the **Contractor** object. To do so, in the **ELMA Designer** go to the **Objects** tab, open the **CRM** folder in the left panel and double-click on the **Contractor** object (Fig. 8). For its configuration, see below.

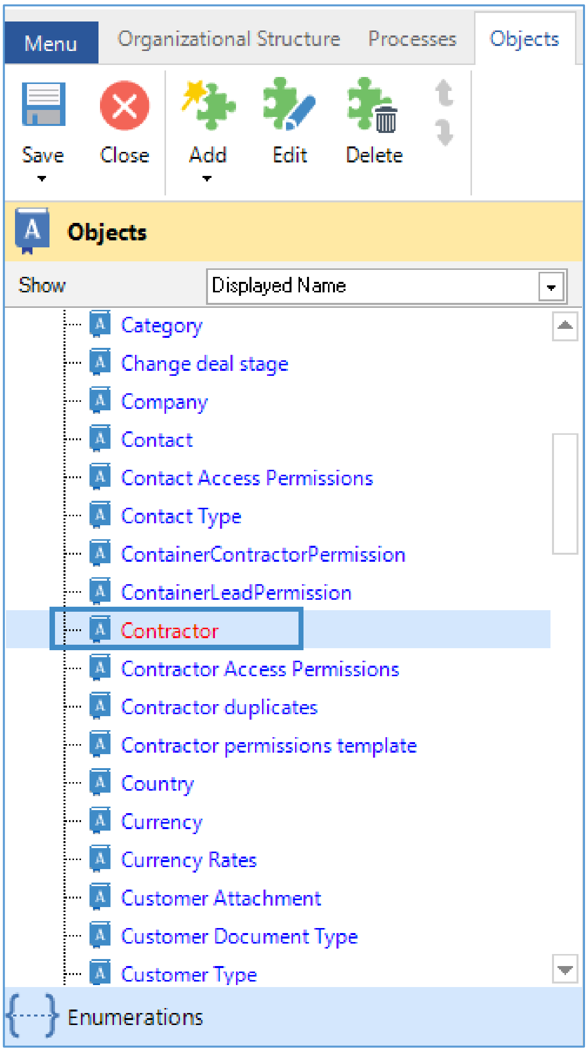


Fig. 8. Objects tab in ELMA Designer

Go to the **Properties** tab on the object page that opens (Fig. 9).

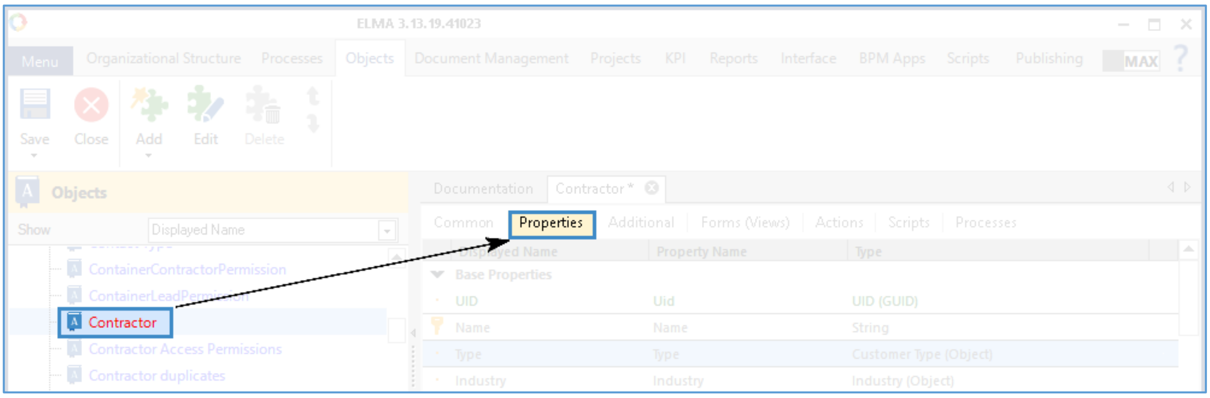


Fig. 9. Contractor page. Properties tab

Click **Add** on the toolbar to create new properties (Fig. 10).

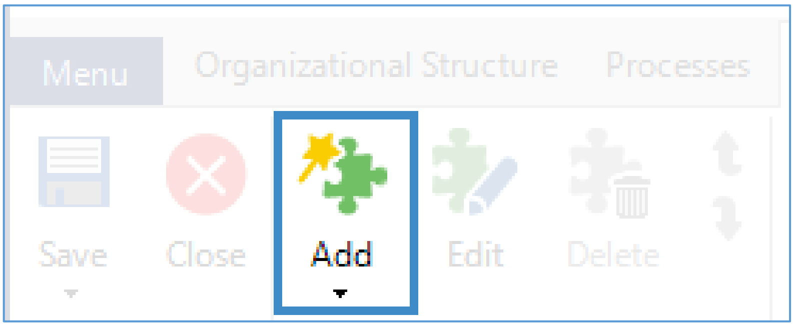


Fig. 10. Add new property button

In the dialog box (Fig. 11) that opens enter the name of the new field – 'Special delivery conditions' and select its type – **Text**. Click **OK** to add the new field.

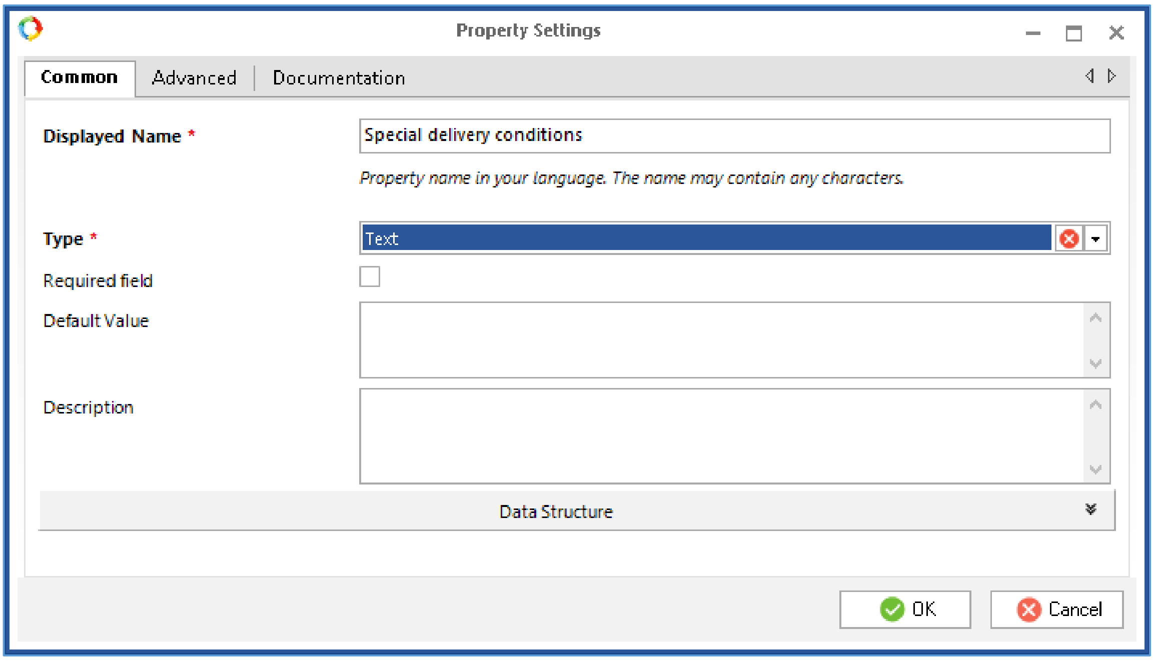


Fig. 11. Property settings window

To add a more complex structure (a table with the list of cars used in a company), let's use the **Block** type field. Essentially, it is a table with several columns. See [this Help page]() to find out more about the **Block** property.

On the **Properties** tab, in the submenu of the **Add** button, click the **Add Block** button to create a new block (Fig. 12).

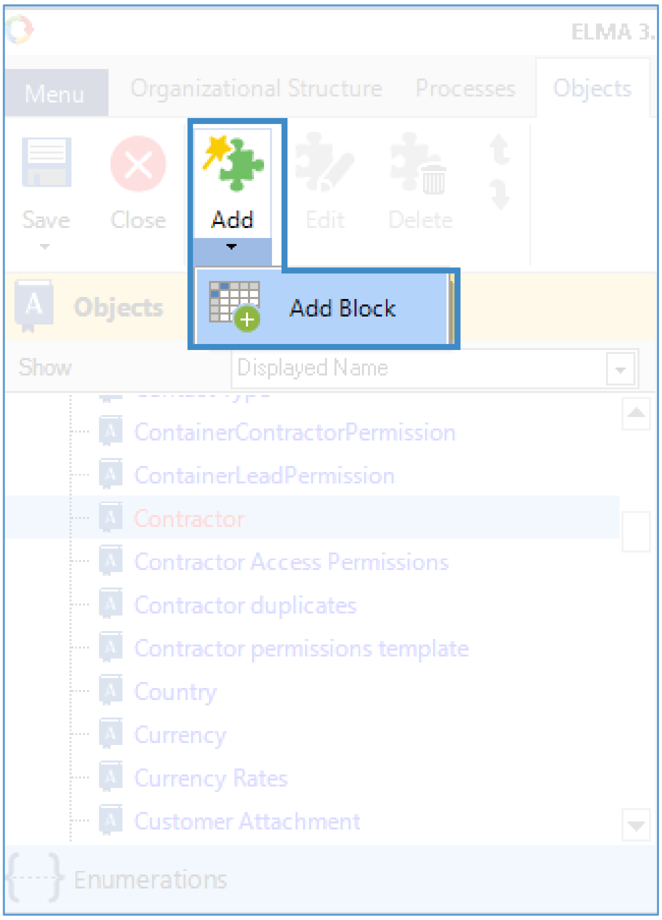


Fig. 12. Add block submenu

Follow these steps to add a new block. First, enter the field name.

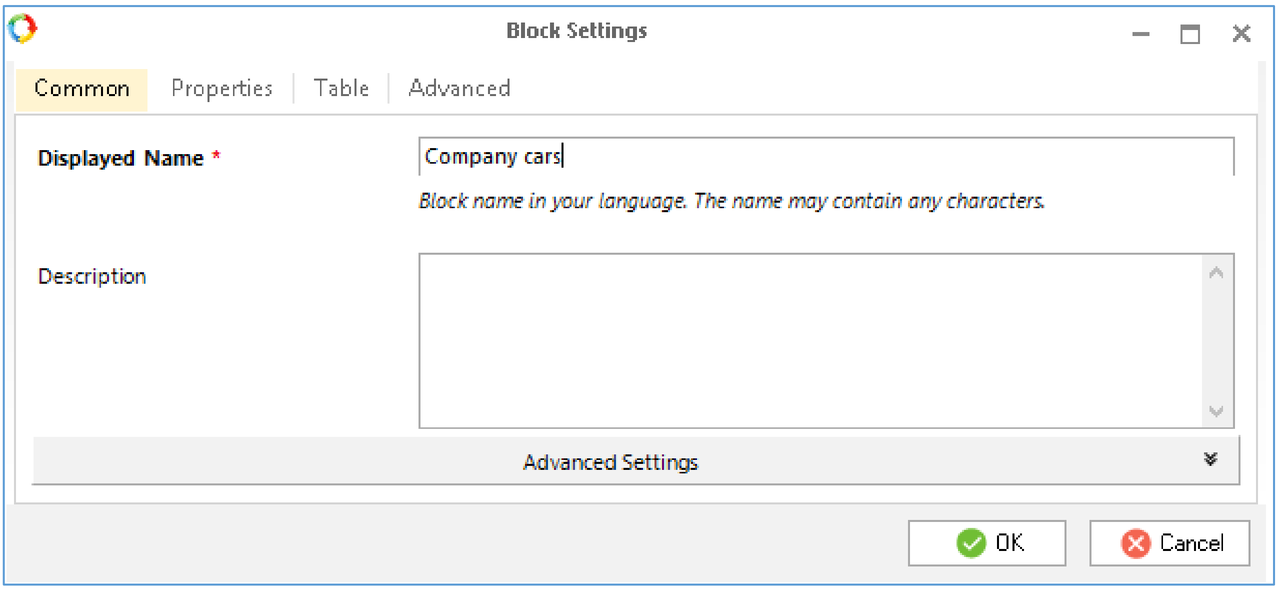


Fig. 13. Enter block name

Second, add block properties (columns). To do so, go to the **Properties** tab, click **Add property** (Fig. 14).

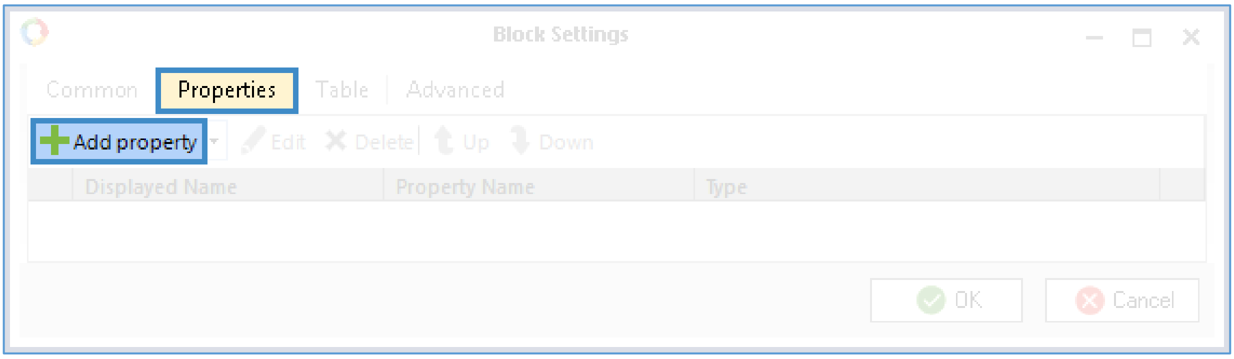


Fig. 14. Add property button in block settings

A property settings dialog box will open. Add two properties of the **String** type – 'Registration plate' and 'Car'. After that the **Properties** tab will look as follows (Fig. 15):

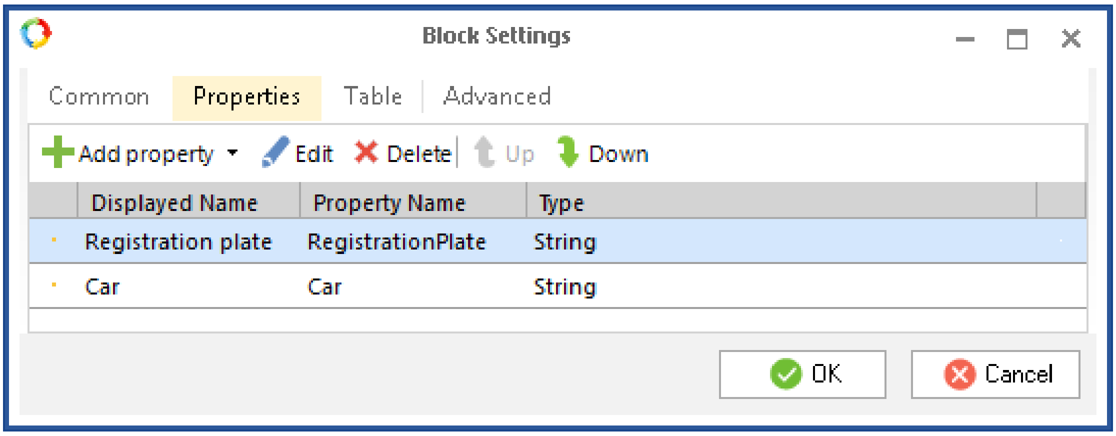


Fig. 15. List of block properties

You can move the block columns by clicking the **Up** and **Down** buttons. Click **OK** to save the block.

3.2.2. Configuring Forms

The next step is to configure the display of the custom fields on the edit/view form. For this purpose, the ELMA Designer has the **form builder** that allows changing the position of fields in a visual editor.

You can find all forms of an object on its page on the **Forms (Views)** tab (Fig. 16). On this tab, you can assign default forms, see in what objects a form is used, create a new form or edit an existing one.

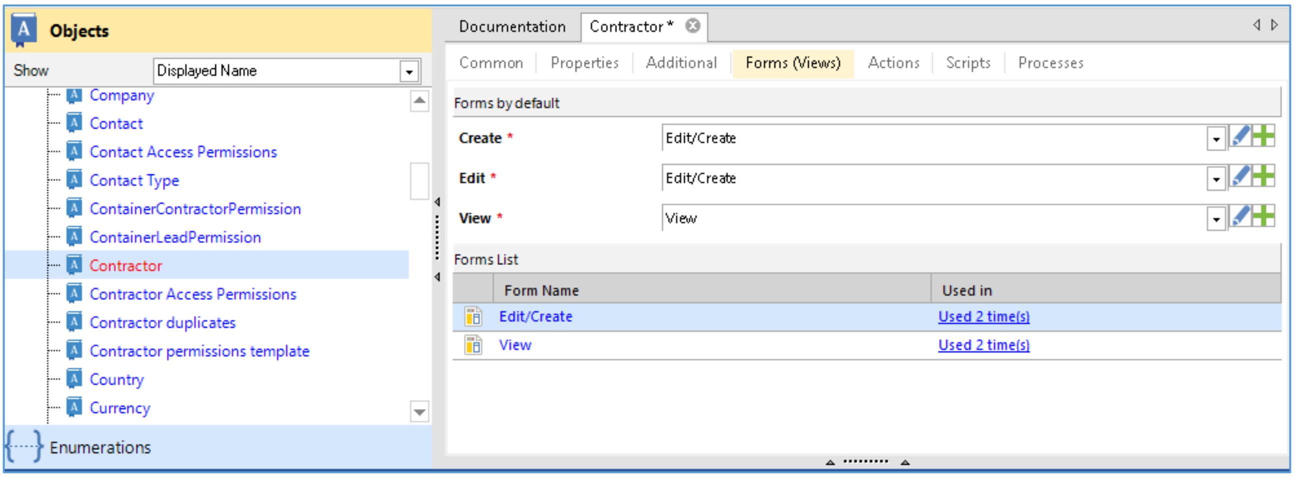


Fig. 16. Forms (Views) tab

Each object has three forms:

- Create form;
- Edit form;
- View form.

By default, the **Create** and **Edit** forms are the same.

First, let's edit the **View** form. To do so, select it in the list and click the **Edit** button (Fig. 17) on the toolbar. Alternatively, you can double-click on the name of the form to edit it.

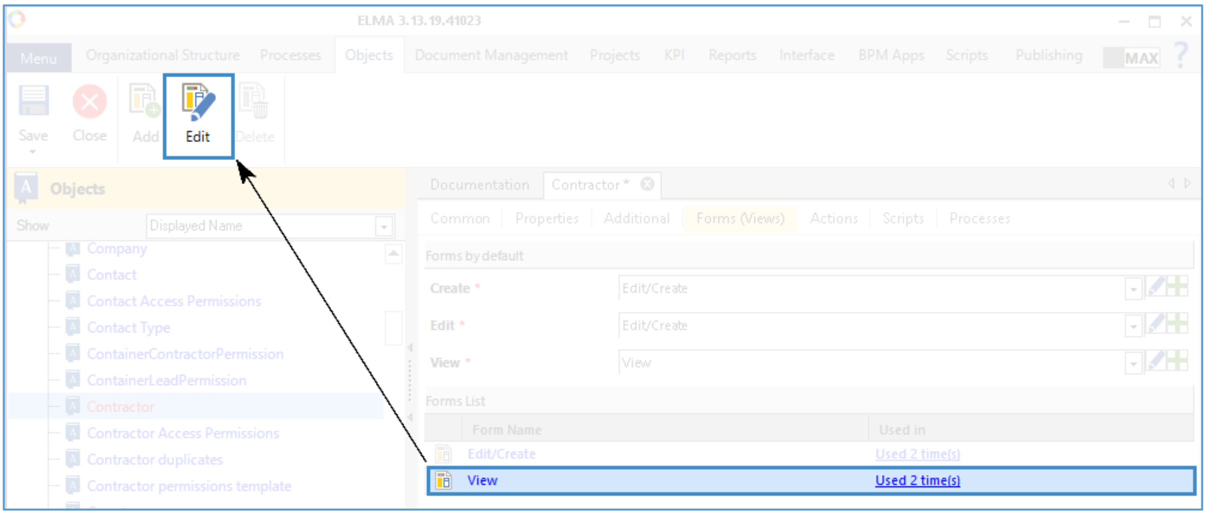


Fig. 17. Edit form button

After that, the **Forms** tab will open. Here you can configure how data is displayed on the form.

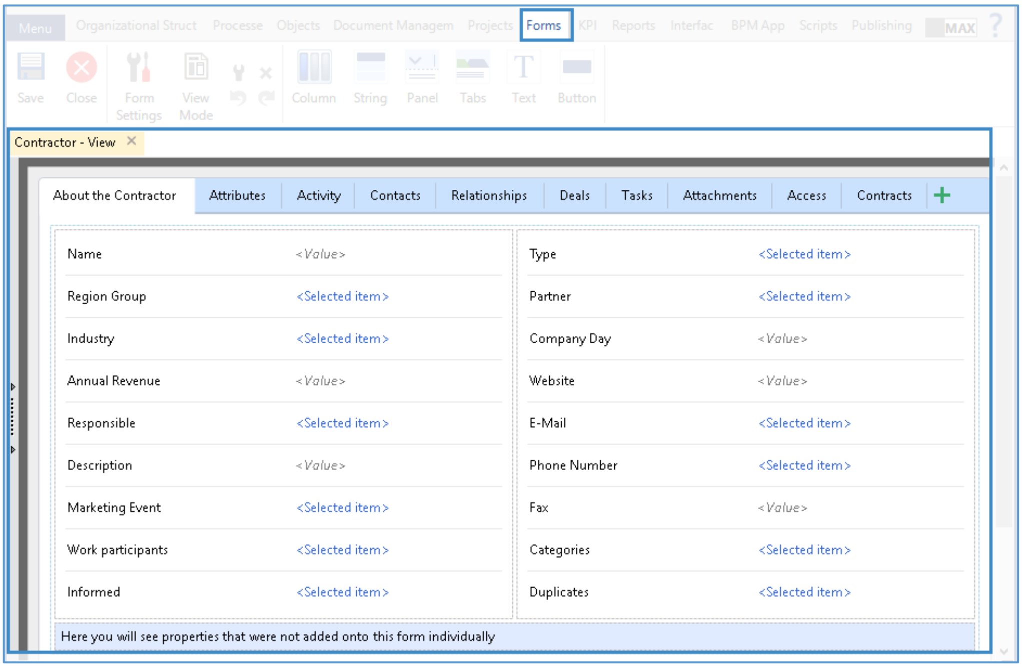


Fig. 18. General view of the form builder

For more details on the form builder, see this Help page and the User Manual on ELMA BPM Platform.

In our case, we need to do this:

- Create the ‘Delivery’ tab;
- Add to the tab two columns and the properties ‘Special delivery conditions’ and ‘Company cars’.

When you finish configuring the 'Delivery' tab, it will look as follows (Fig. 19):

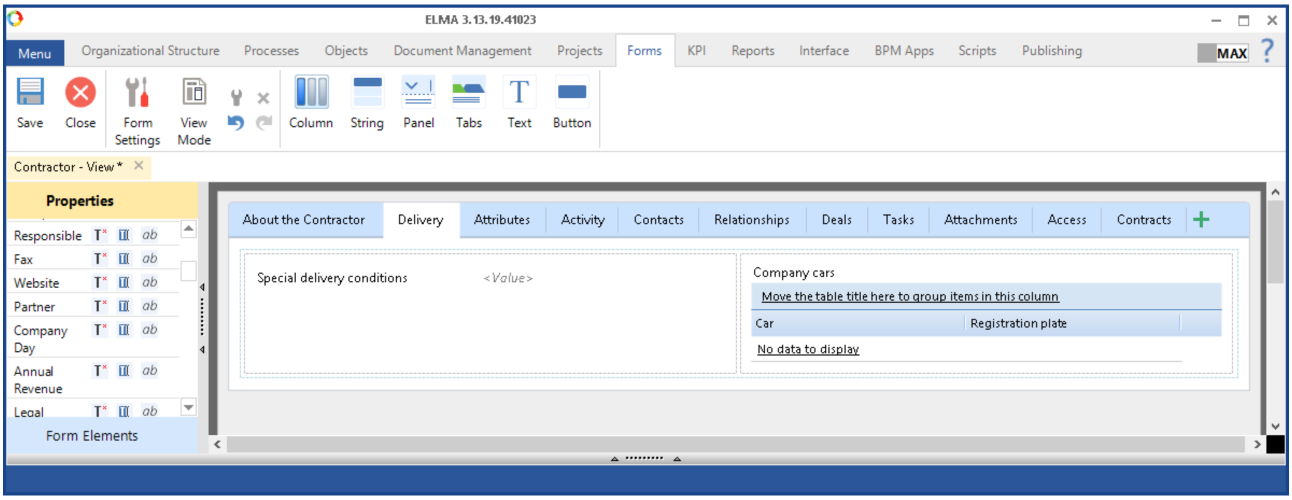


Fig. 19. View form after modification

Click **Save** and then **Close** (Fig. 20) the form builder.

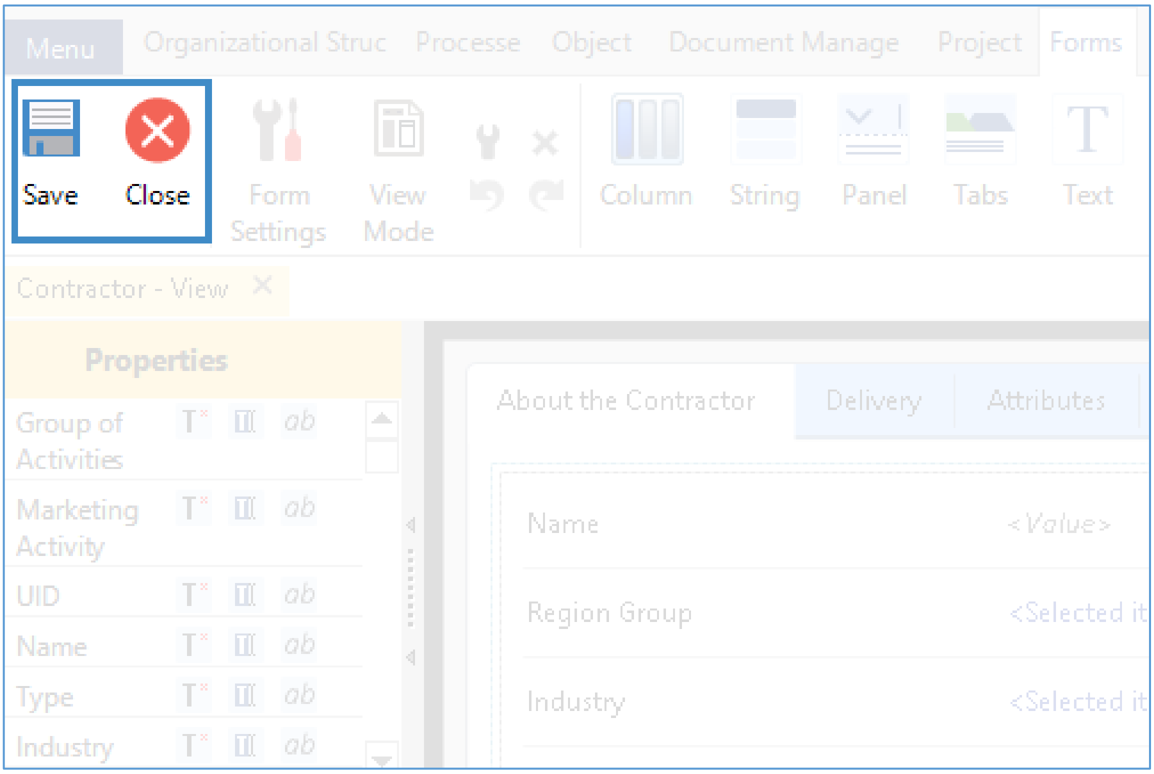


Fig. 20. Save and close form

In the same way, change the edit form. You don't have to create a new tab here: just add a panel and drag the properties there.

To apply changes, you need to do one of the two things:

1. If you added properties to an object form in the ELMA Designer, publish the modified object.
2. If you added properties to the object itself, publish the object and restart the server.

In our case, we added both new properties to the **Contractor** object as well as properties to the form of the **Contractor** object. It means that we should stick to the second option.

To do so, click **Publish** in the submenu of the **Save** button (Fig. 21).

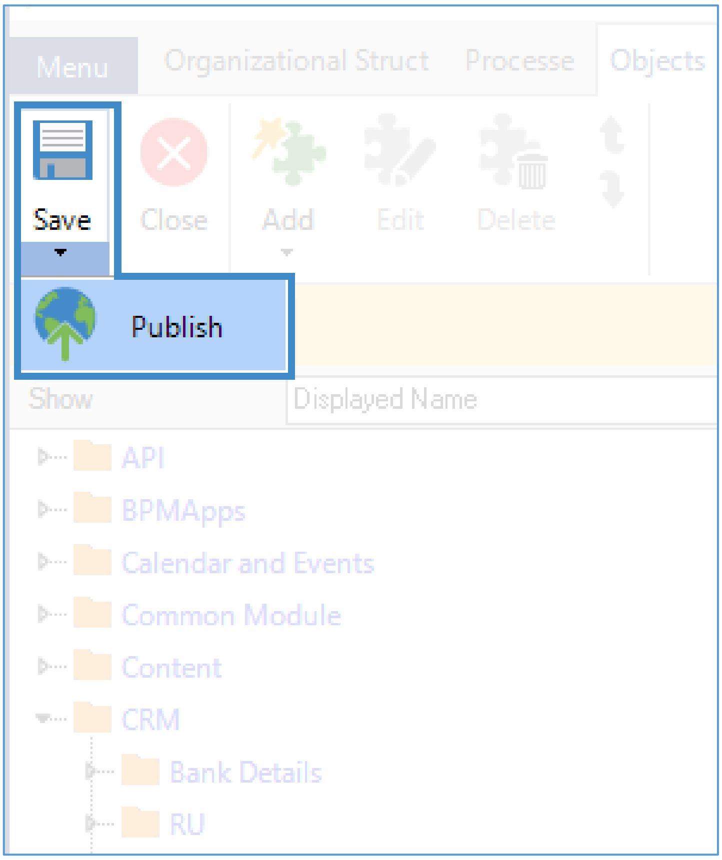


Fig. 21. Publish object button

A dialog box will appear where you should comment on the changes you've made to the object, and then click **OK** (Fig. 22).

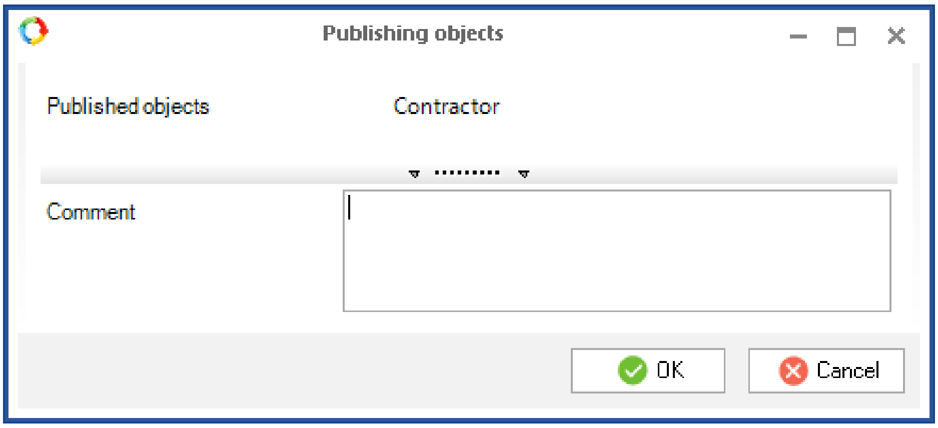


Fig. 22. Comment window when publishing an object

To restart the ELMA server, go to the **Publishing** tab in the ELMA Designer and click **Restart Server** (Fig. 23).

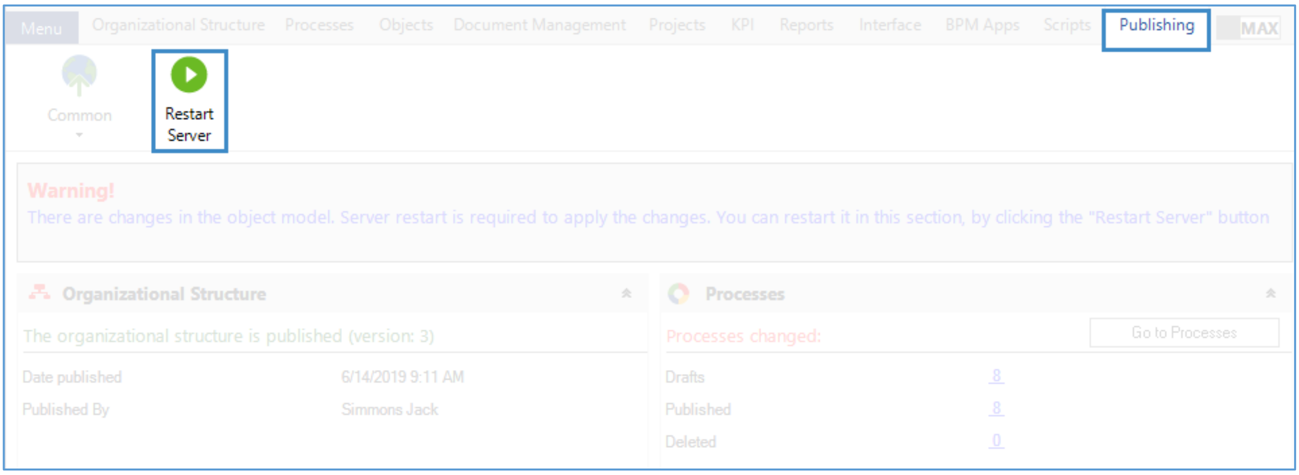


Fig. 23. Restart server button

As the restart might take a long time, we recommend restarting the ELMA server during nonworking hours.

Once the server has restarted, the configured fields will appear on the *create* and *view* forms of the **Contractor** object (Fig. 24, Fig. 25).

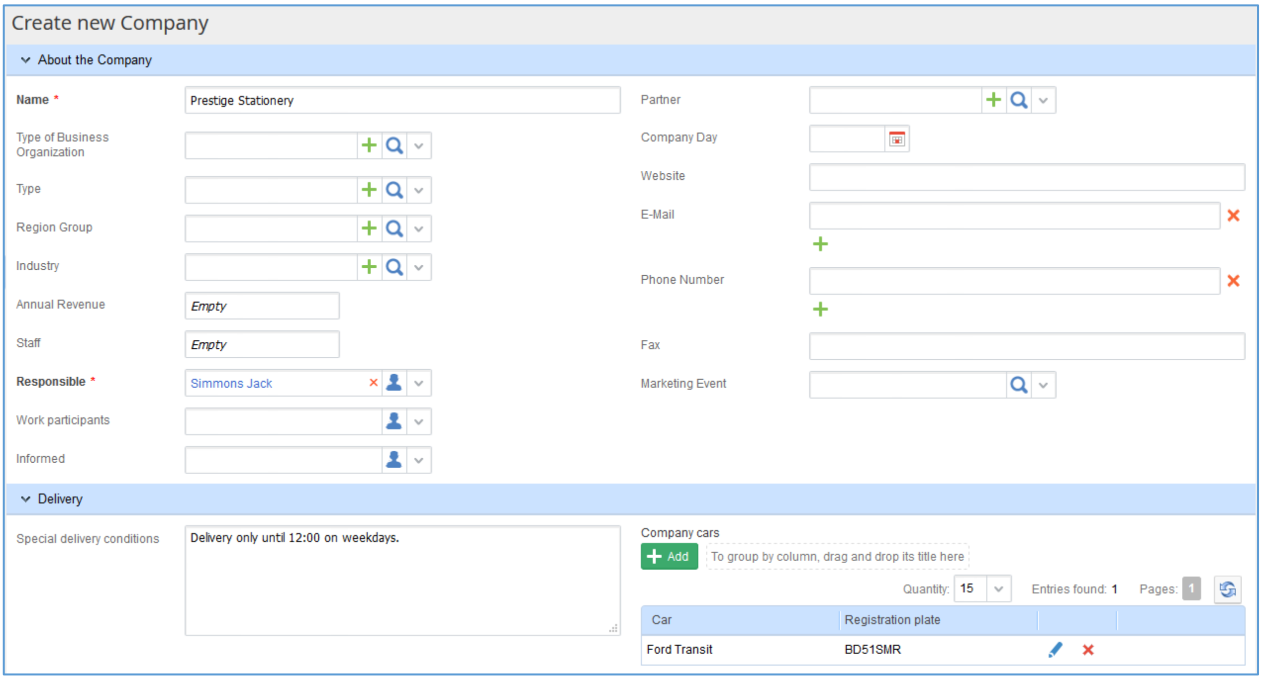


Fig. 24. Configured create form of the contractor object

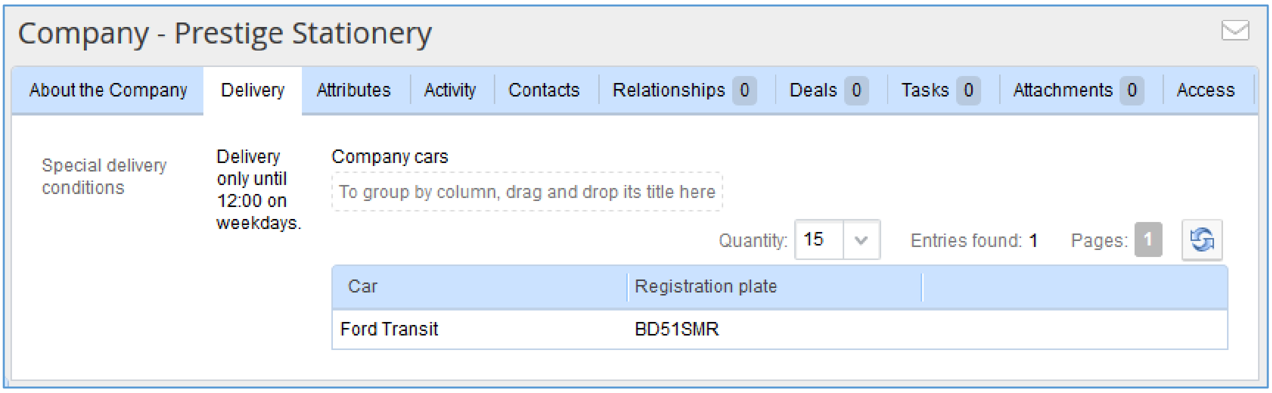


Fig. 25. Configured tab on a contractor page

3.2.3. Configuring Objects

The final step you need to perform before your get stared, is to create object items. The system already has the default objects: **Customer Type, Industry, Region Group.**

Let's add items to the following objects:

- **Customer Type;**
- **Type of Business Organization;**
- **Industry;**
- **Region group.**

To configure access permissions to objects, go to **Administration – Users – Access Settings – Objects**.

First, let's fill out the **Customer Type** object. In the Web Application, click **Objects** in the left menu and then select **Customer Type**.

By default, this object already contains the 'Partner' item. Click **Create** on the top toolbar to add new items to the object (Fig. 26).

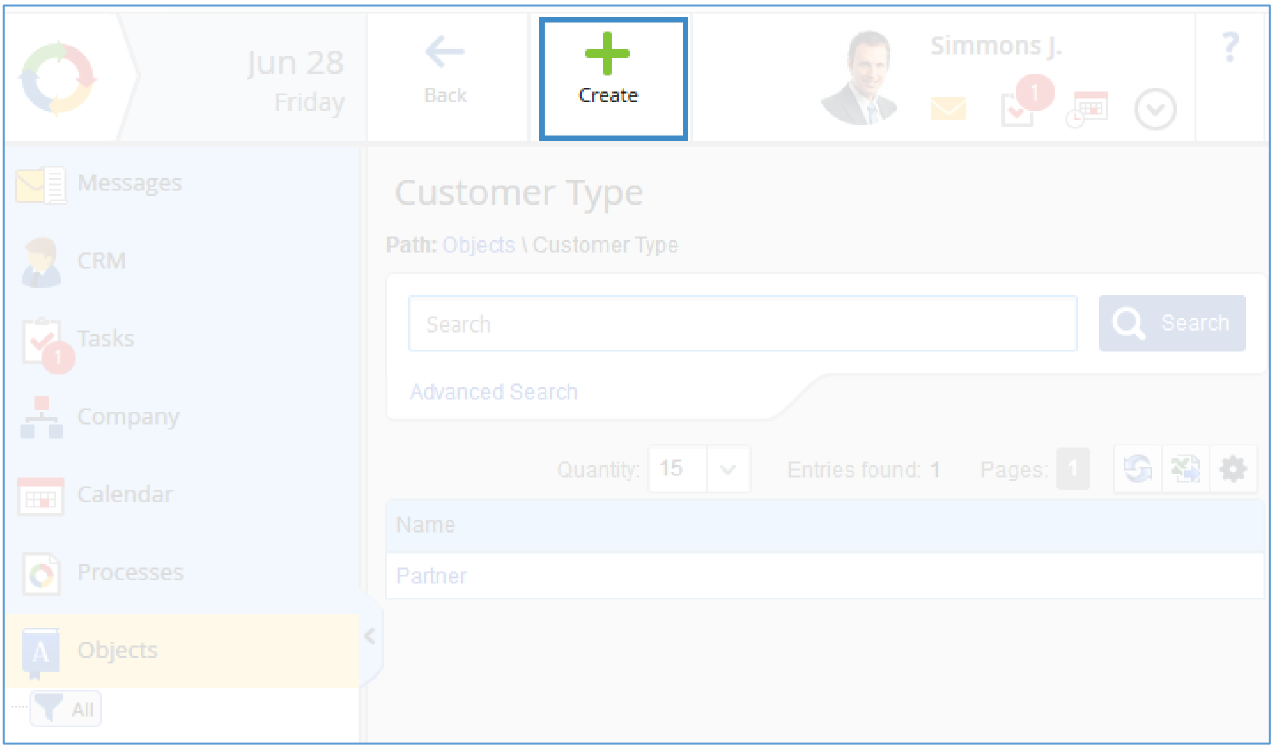


Fig. 26. Create an object item button

Enter the item name 'Regular Customer' in the form that opens and click **Save** in the toolbar (Fig. 27).

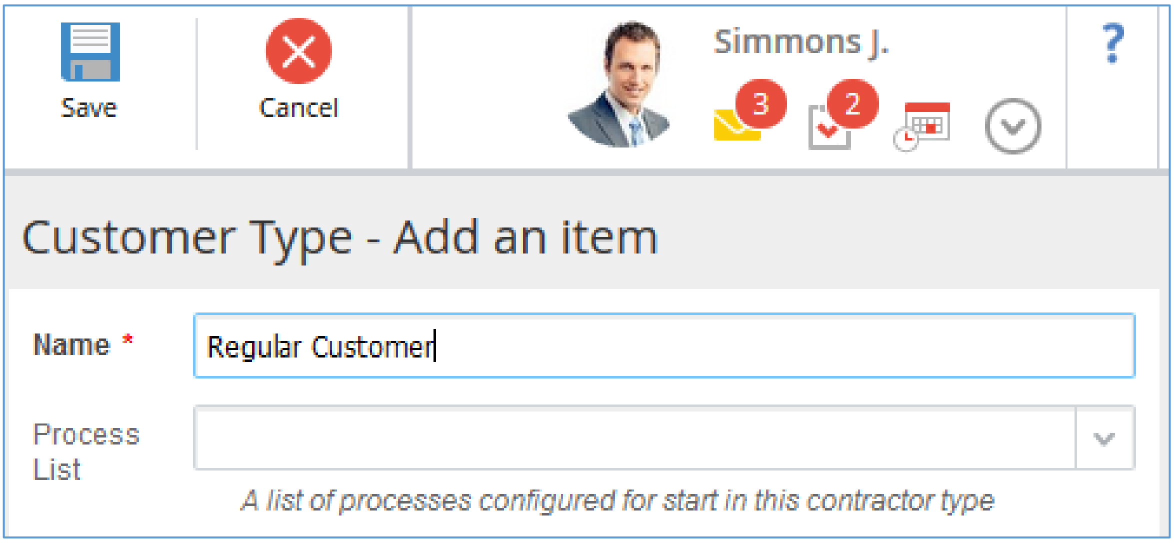


Fig. 27. Saving an object item

In the same way, create two more items – ‘Supplier’ and ‘Service Organization’.

Now the **Customer Type** object contains the following items (Fig. 28):

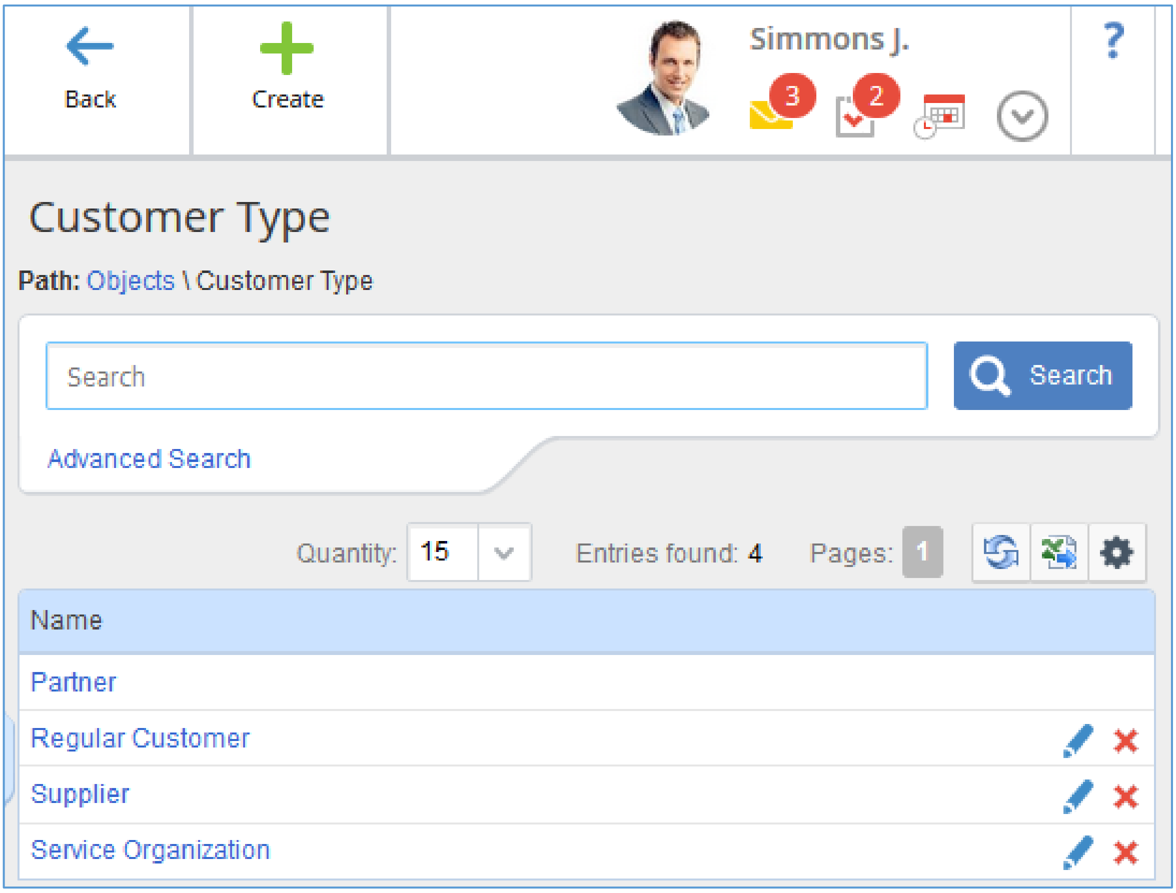


Fig. 28. Customer type object with added items

Likewise, create the following items in the **Type of Business Organization** (Fig. 29):

- Sole Proprietorship;
- Partnership;
- Limited Liability Company (LLC).

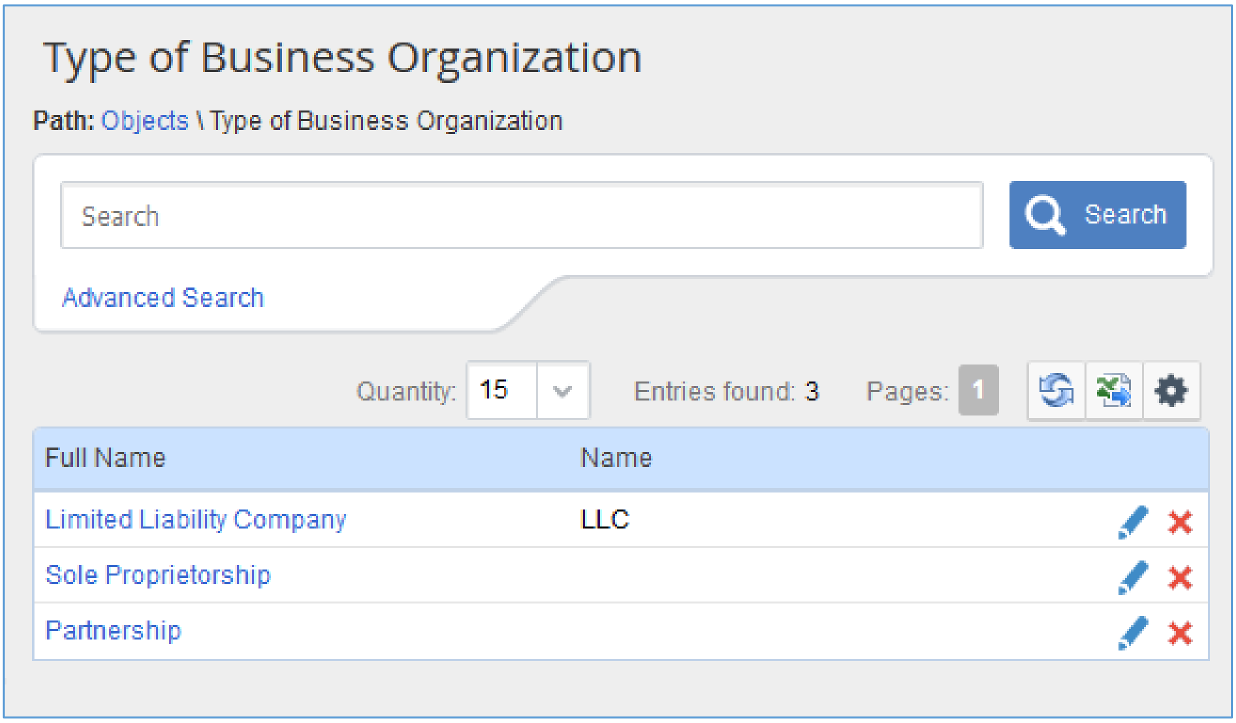


Fig. 29. Type of business organization object with added items

Add these items to the **Industry** object: (Fig. 30):

- Footwear;
- Food Delivery;
- Papermaking;
- Retail.

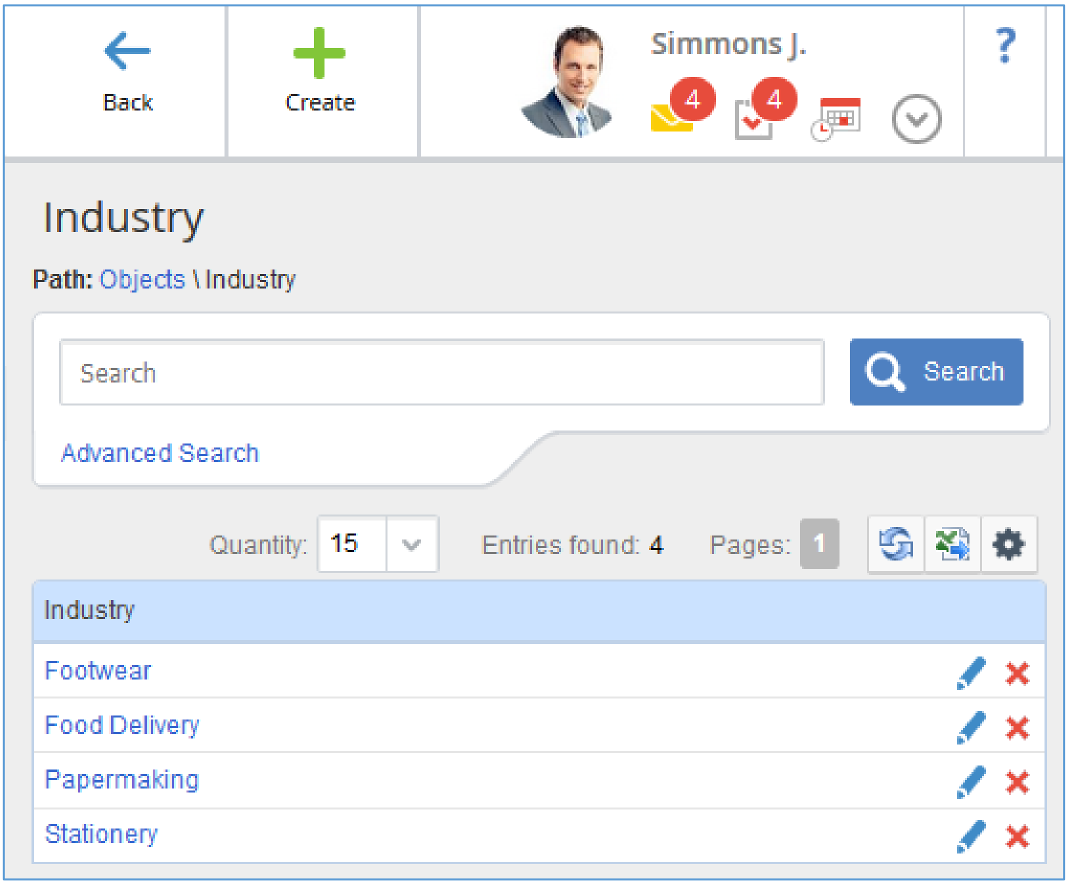


Fig. 30. Industry object with added items

Another object is **Region Group**. Let's add new items to it too:

- New York;
- Northeast;
- Southeast;
- Southwest;
- Midwest;
- West;
- Other Regions;

This is what the **Region Group** object will look like (Fig. 31):

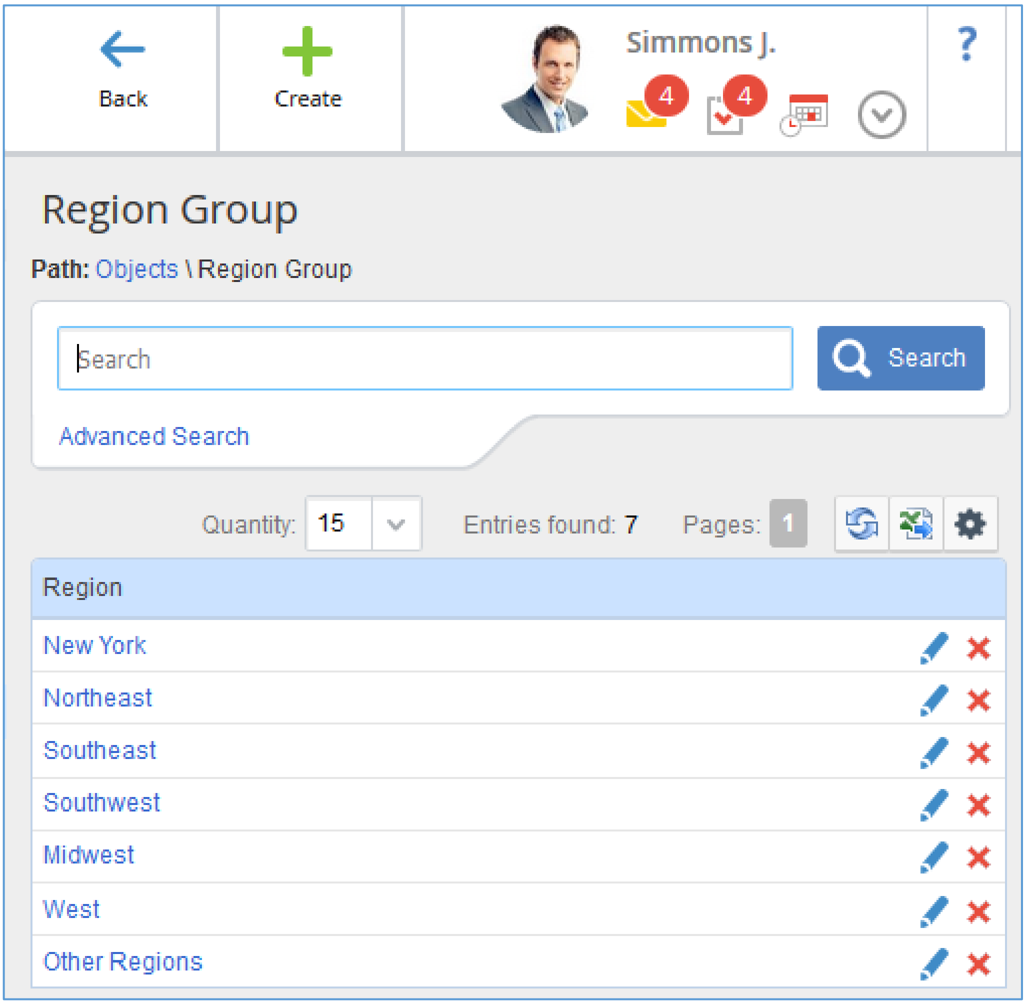


Fig. 31. Region group object with added items

Now that we have configured all the objects, you can use the added items while creating and editing new **Contractors** (Fig. 32).

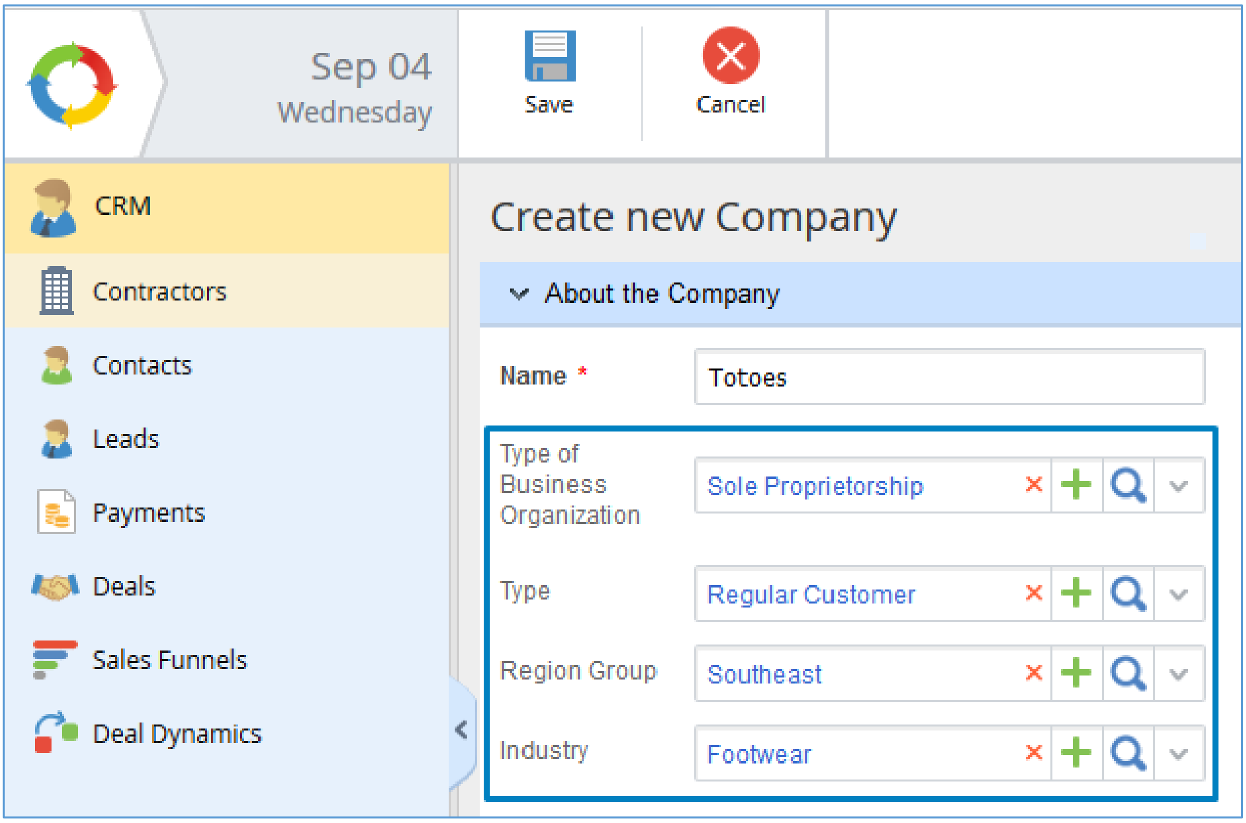


Fig. 32. Creating a contractor using object items

For more details about objects, refer to ELMA Help.

3.3. Configuring a Sales Funnel

Now let's configure deals. A **deal** is a series of agreements with a contractor that lead to signing up a bilateral agreement. In the system, you can conclude a deal only with a **Contractor**.

An unlimited number of deal types can be created in the system, and each deal type can have its own sales funnel.

A **sales funnel** is the tool to visualize the distribution of deals across the stages of the sales process. The sales funnel should have opening and closing deal stages. If a company provides different services, you might want to use two different sales funnels. For example, a company sells software products and support them. In this case, two sales funnels will be created. When creating a sales funnel, the required number of deal stages is added, and their order is specified.

In this subsection, you will learn how to configure deals, sales funnels and objects. We will use simple deals with a small number of steps as an example. For more information on using deals, sales funnels and objects, see this Help page.

3.3.1. Configuring a Deal Page

First, let's configure the **Deal** page. Open the ELMA Designer, go to the **Objects** tab and select the **Deal** object in the **CRM** section (Fig. 8).

Add a new field (Fig. 33) on the **Properties** tab.

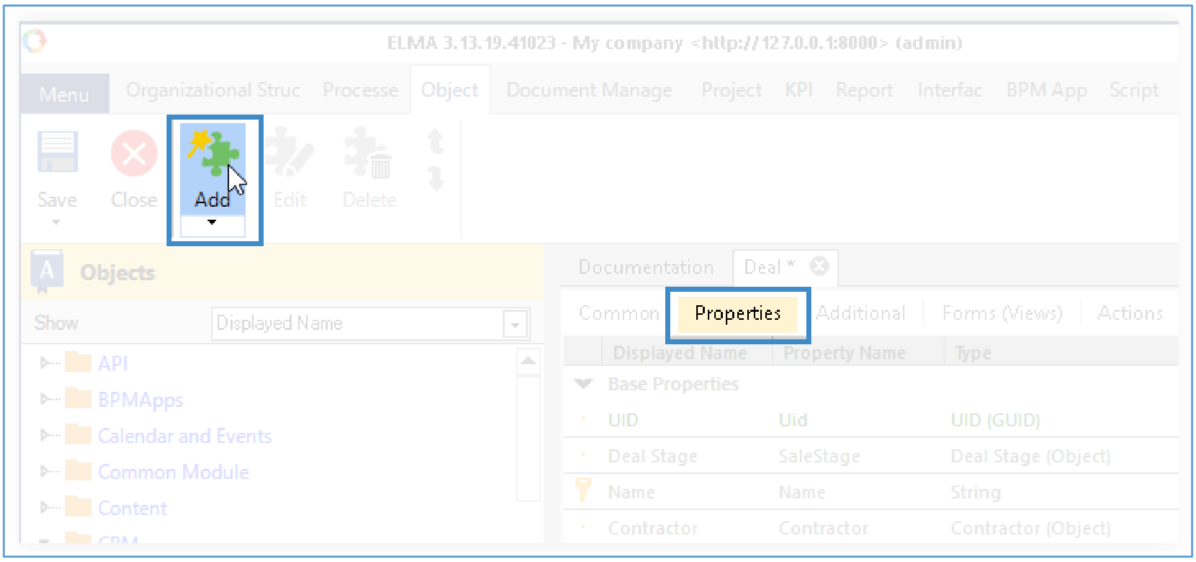


Fig. 33. Add new property button

Create a new property with the displayed name **Delivery Type** and the **Drop-Down List** data type (Fig. 34).

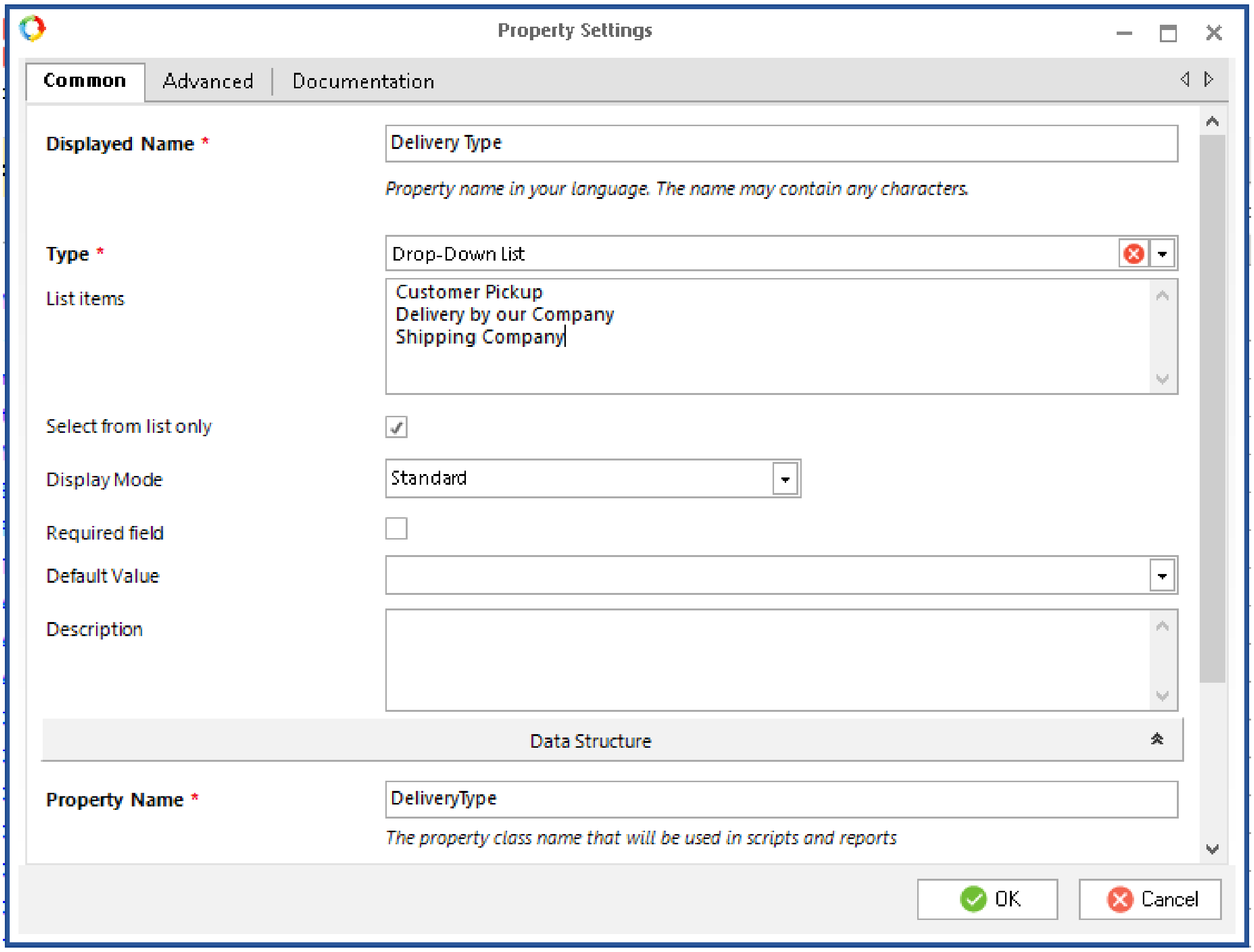


Fig. 34. Settings window for the drop-down list property type

In the **List items** field specify all the available alternatives. Add the following values to this field: ‘Pickup’, ‘Delivery’, and ‘Shipping Company’.

Remember to check the **Select from list only** box. Otherwise, users will be able to enter their own values.

The values form this field will be used as a criteria for the advanced search. To enable this option, go to the **Advanced** tab and check **Participates in Search (Filter)** (Fig. 35).

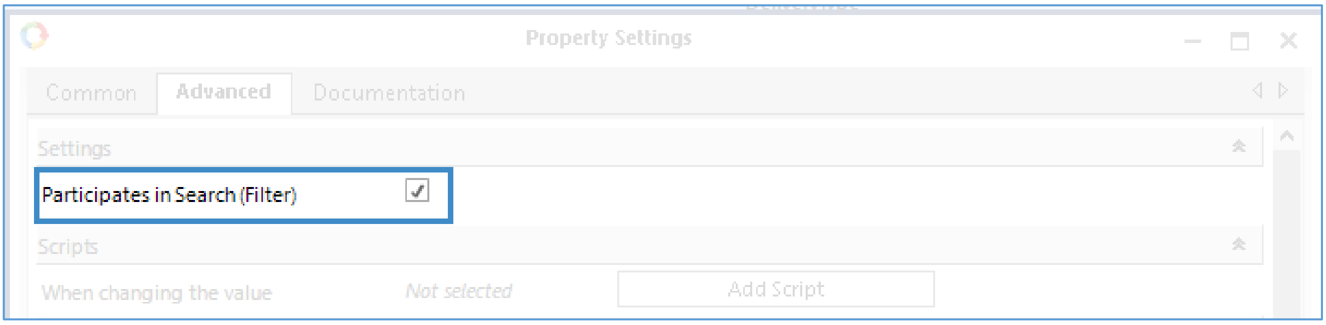


Fig. 35. Participates in search (filter) box

Click **OK** to save the new property.

The **Deal** form is set up in the same way as a **Contractor** form. Add a new panel to the Edit form, name it 'Delivery Information' and move the property **Delivery Type** under this panel (Fig. 36).

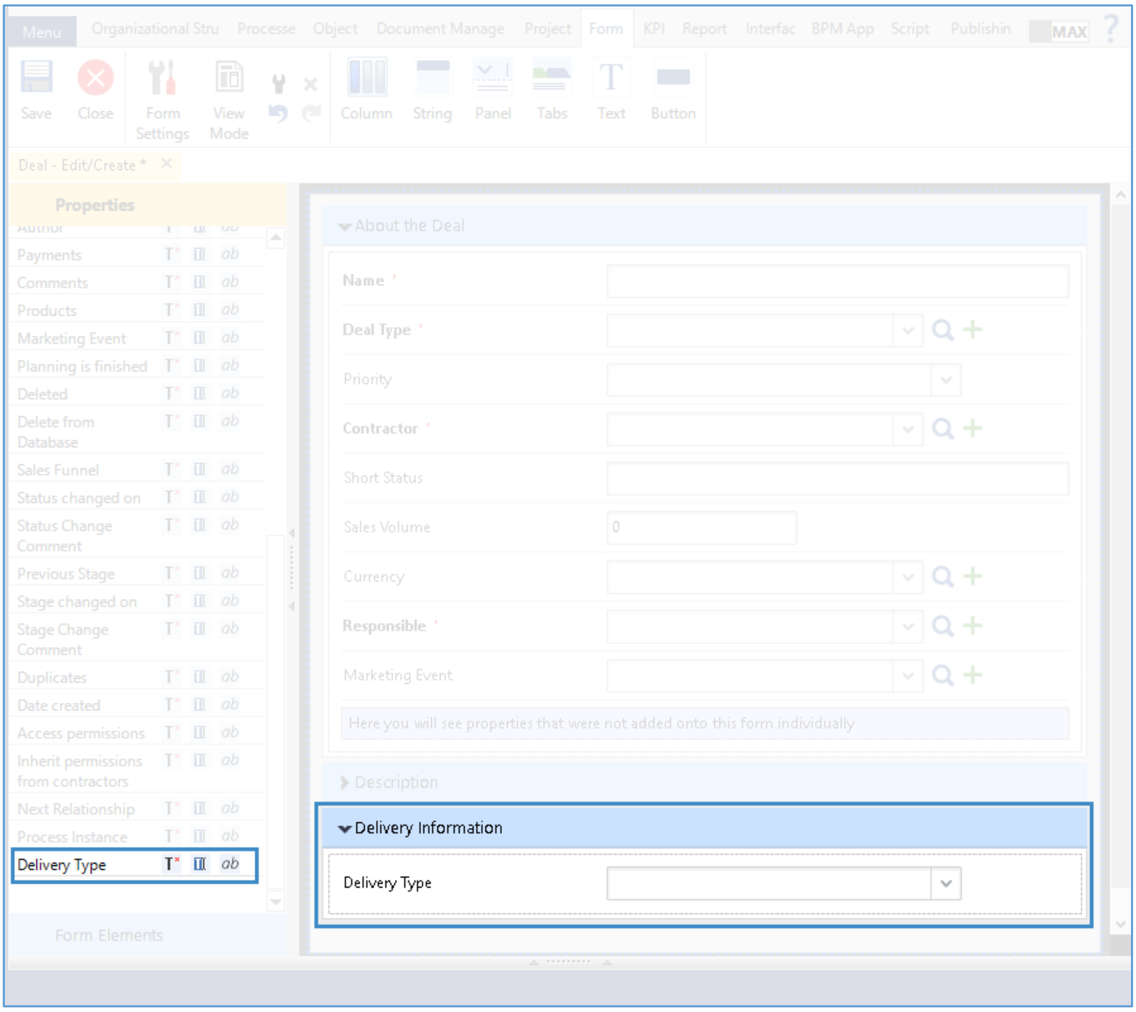


Fig. 36. Edit form settings of the deal object

You have to publish the updated **Deal** object. After that the new field will be available for editing in the web application.

3.3.2. Configuring Deal Objects

To work with **Deals**, you will need such objects as **Currency** and **Deal Type**.

Open the **Currency** object and add the item: 'Dollars (USD)' (Fig. 37).

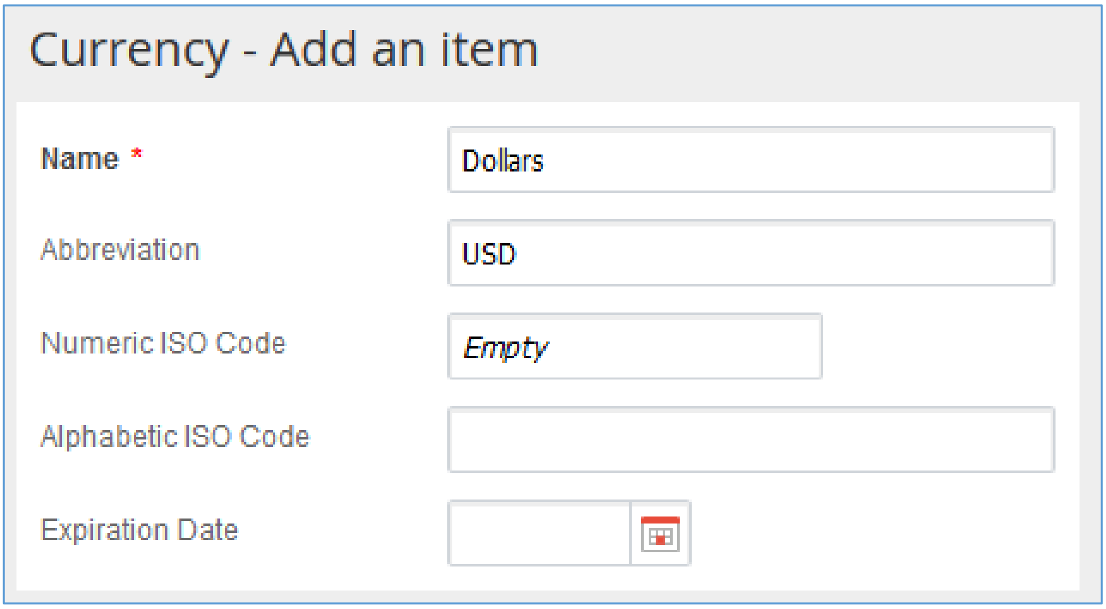


Fig. 37. Adding an item to the currency object

Then open the **Deal Type** object and create the item 'Product Shipment' (Fig. 38). We'll edit it at the final stages of configuring the **Sales funnel**.

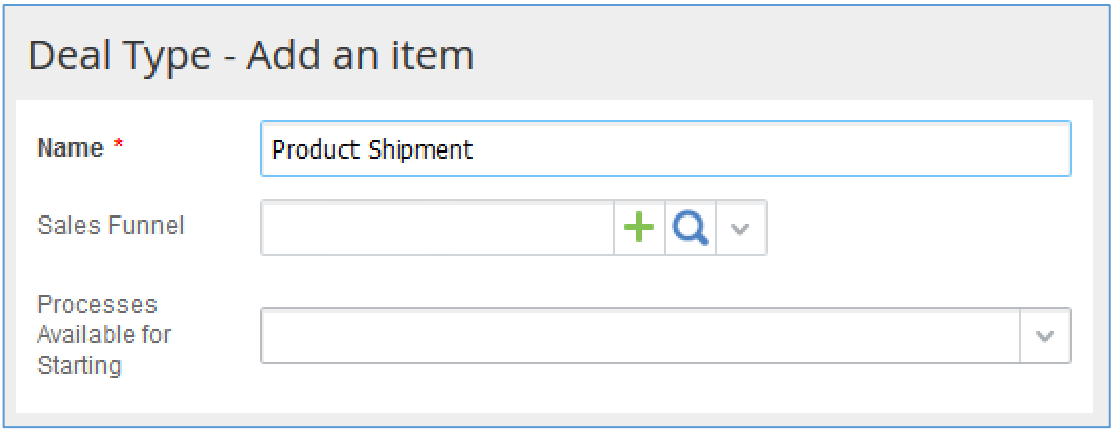


Fig. 38. Adding an item to the deal type object

Save the item. For now, we are done with configuring the items necessary to work with the **Deal** object.

3.3.3. Sales Funnel. Deal Stages and Types

The next step is to create and configure a sales funnel. To do this, go to the **Sales Funnel** section (object) in ***Administration – CRM Settings – Sales Funnel*** (Fig. 39).

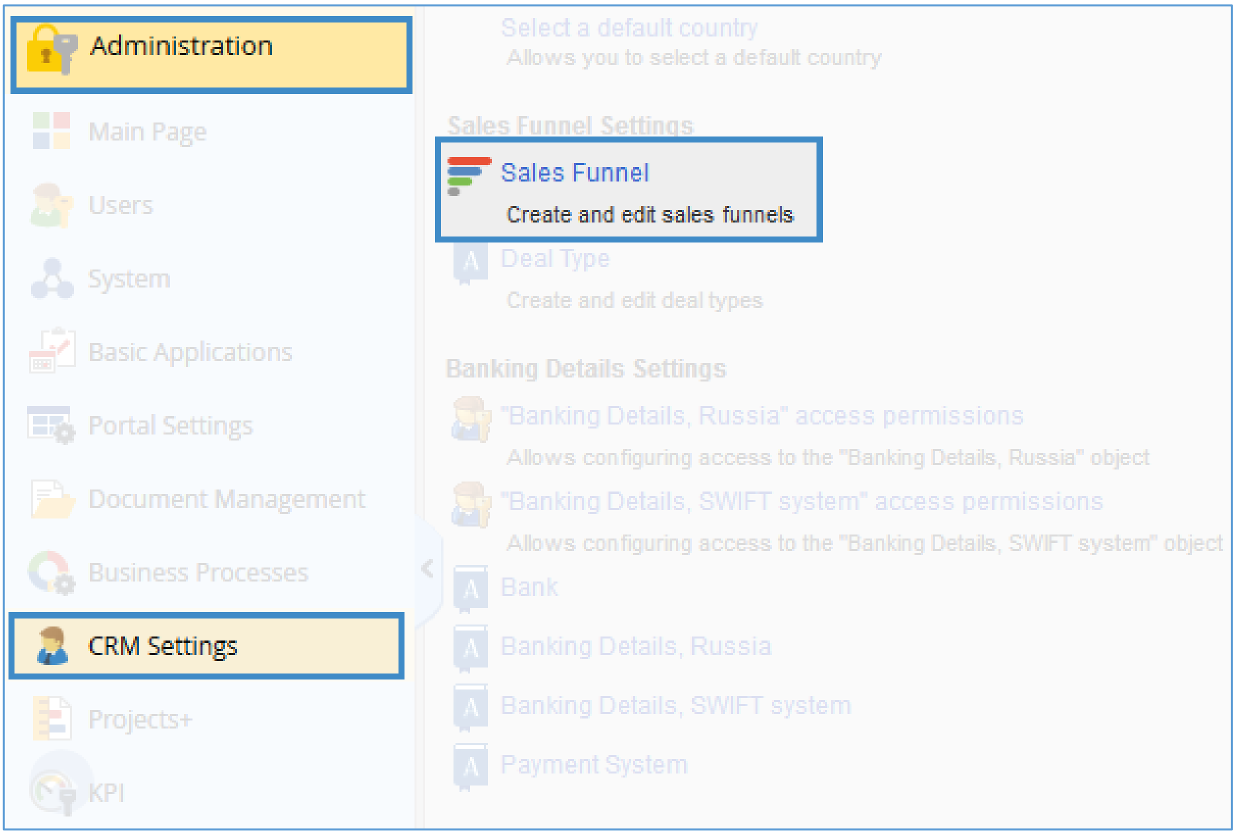


Fig. 39. Managing sales funnels

There can be several **Sales Funnels** in the system. Click **Create** to configure the first one (Fig. 40).

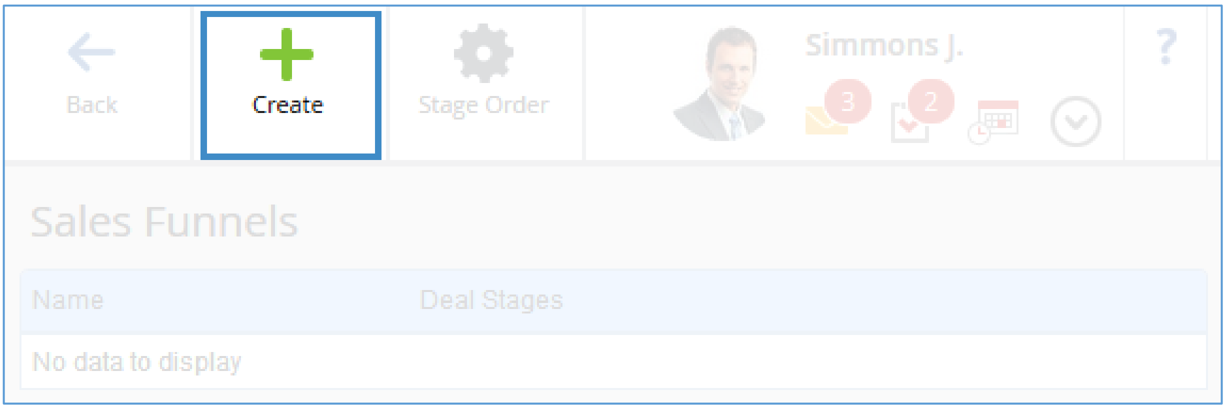


Fig. 40. Create new sales funnel button

Enter the name of the sales funnel, e.g. 'Product Shipment' (Fig. 41).

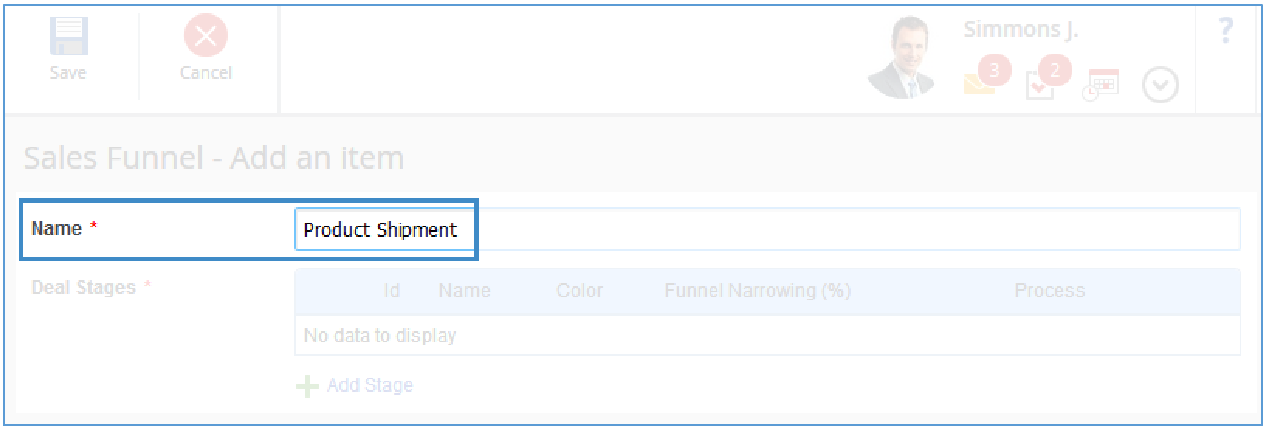


Fig. 41. Enter the name of the sales funnel

After that add several new items to **Deal Stages**: Interest in the product, Signing the contract, Planning the shipment, Payment. To do so, click **Add Stage** (Fig. 42).

Fig. 42. Adding a stage to a sales funnel

Now let's choose stage **Names** and specify the **Funnel Narrowing** (this value will be used when presenting the reports **Sales Funnel** and **Deal Dynamics**) (Fig. 43). **Funnel Narrowing** is the ratio between initial number of deals and the expected number of deals at the current stage (expressed as a percentage). It is determined individually for each company. Besides, when adding a stage, you can configure a color indication. Click **OK** to add the stage.

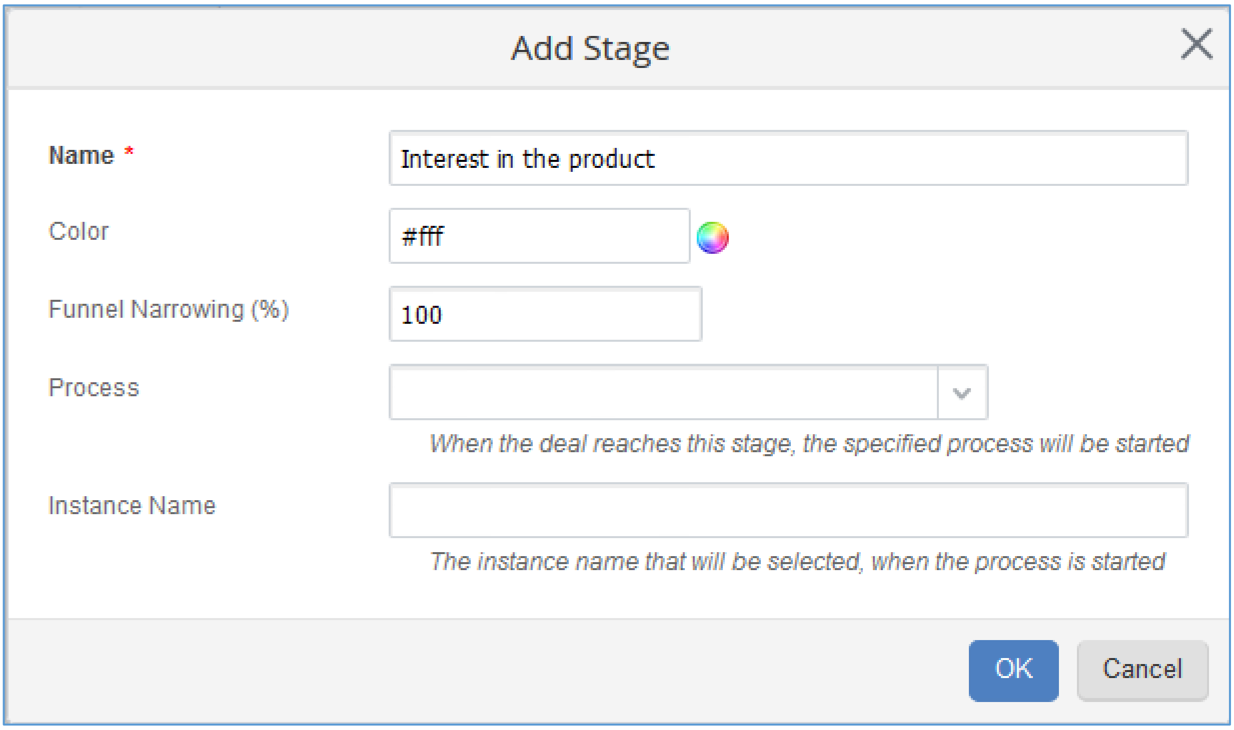


Fig. 43. Add stage to a sales funnel window

Once all the stages are created, the funnel will look like this (Fig. 44):

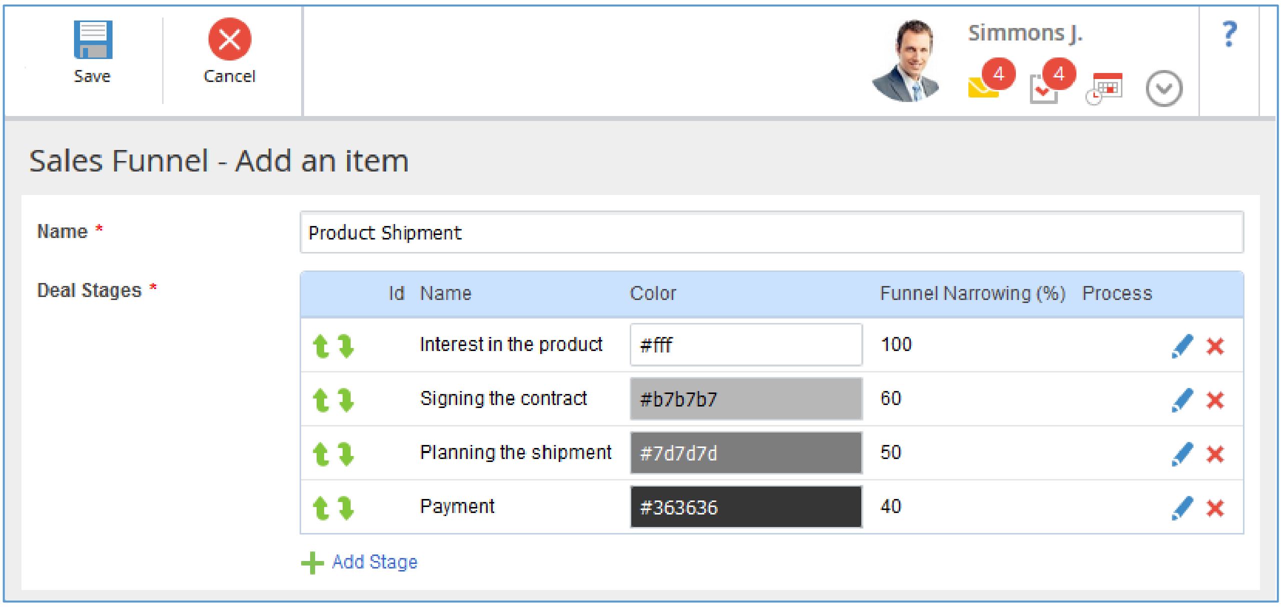


Fig. 44. Create sales funnel window with added stages

To save the configured sales funnel, click **Save** in the top toolbar.

All sales funnels and their stages are displayed as a list (Fig. 45). When there are several sales funnels, the **Stage Order** button will allow you to put all stages in order for displaying reports on several types of sales funnels in the **Deals** section.

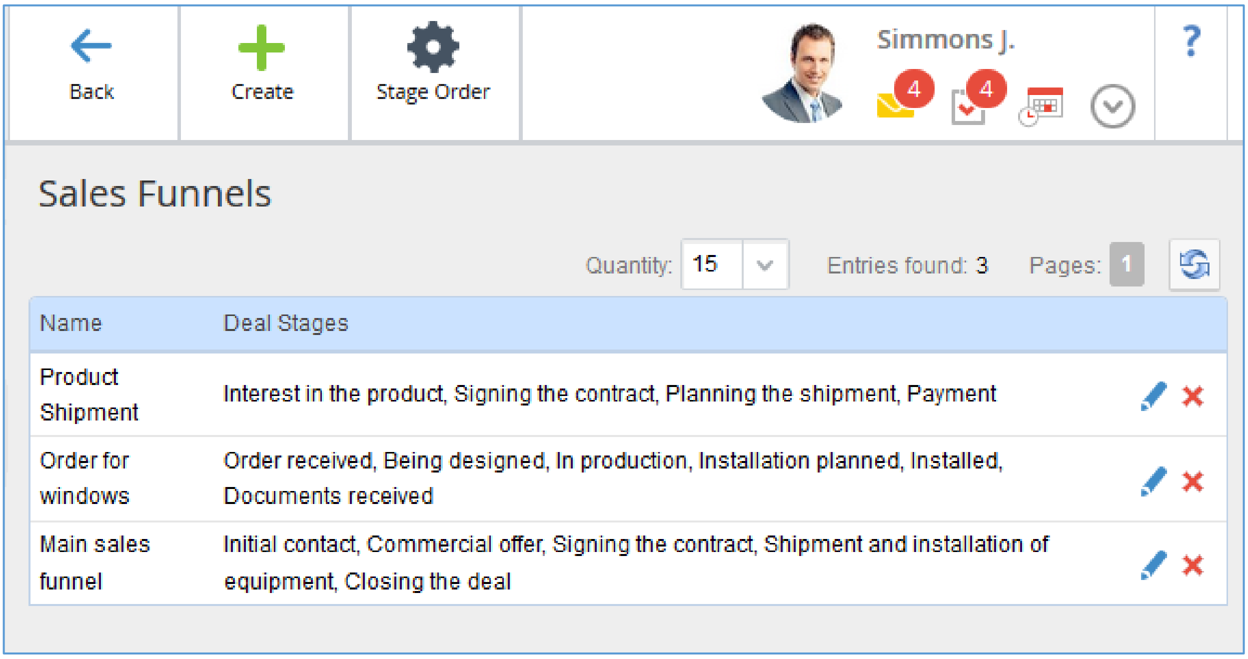


Fig. 45. Managing sales funnels page

Before we complete configuring the **Deal**, let's bind the created sales funnel to the deal type. Open the **Deal Type** object (Fig. 45) and click the icon to edit the previously created item.

On the page that opens, select the 'Product Shipment' **Sales Funnel** (Fig. 46).

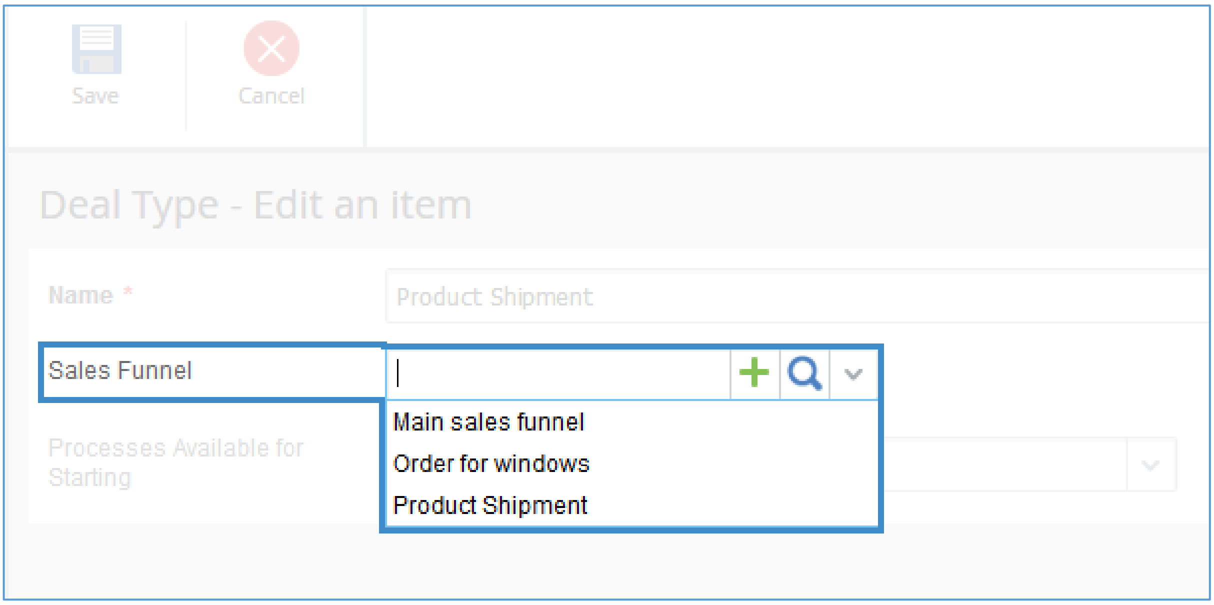


Fig. 46. Selecting a sales funnel in the Deal Type object

Save the changes made to the item of the **Deal Type** object. From now on, while creating a deal, you can select its type and, accordingly, the sales funnel through which it will move.

3.3.4. Configuring the Product and Services Object

When you start working with the **ELMA CRM+ Application**, it is not always necessary to configure the **Product and Services** object. For these purposes, companies normally use **ERP systems**, which stores product data, warehouse and accounting records. ELMA is not an accounting system, this is why we do not recommend creating an object that will store large number of product items.

If the range of products and services is not big, sales reps can use the **Products and Services** object and add its items onto deal pages. Please note that users must have appropriate access permissions to work with objects. Find out more about this in the ELMA Help section.

Now let's configure the object. First, go to the **Administration** section, choose **CRM settings** and then open the **Products and Services** object at the bottom of the page.

This object is hierarchical, so first we will devise the structure of groups for top-level elements. To do so, click **Create Group** in the toolbar on the object page (Fig. 47).

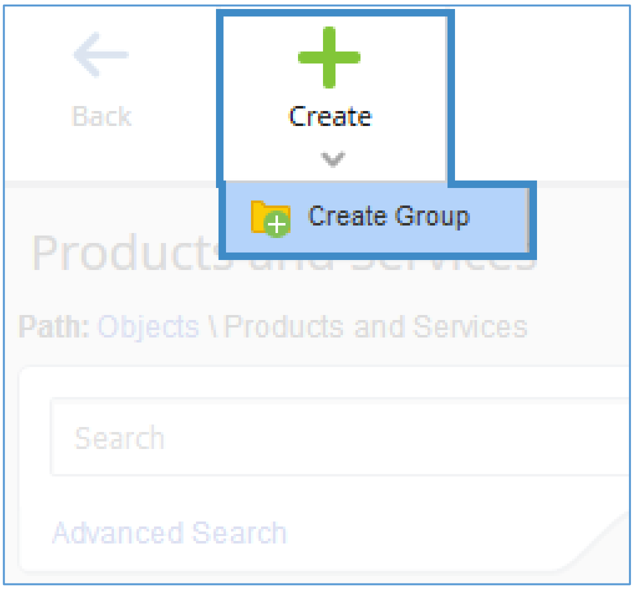


Fig. 47. Drop-down menu of the Create button

On the creation form (Fig. 48), set the **Is a group** parameter to **Yes** and enter the **Name** of the item – **Cardboard Box**.

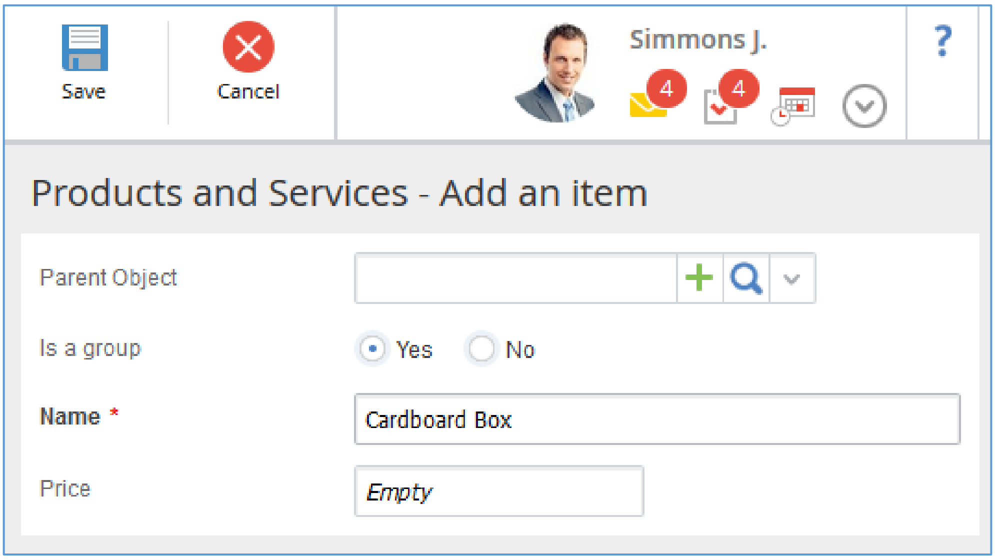


Fig. 48. Adding a group to an object

In the same way, create two more top-level groups called 'Folding Carton' and 'Rigid Box'.

As a result, the three top-level groups in the **Products and Services** object will look as follows (Fig. 49):

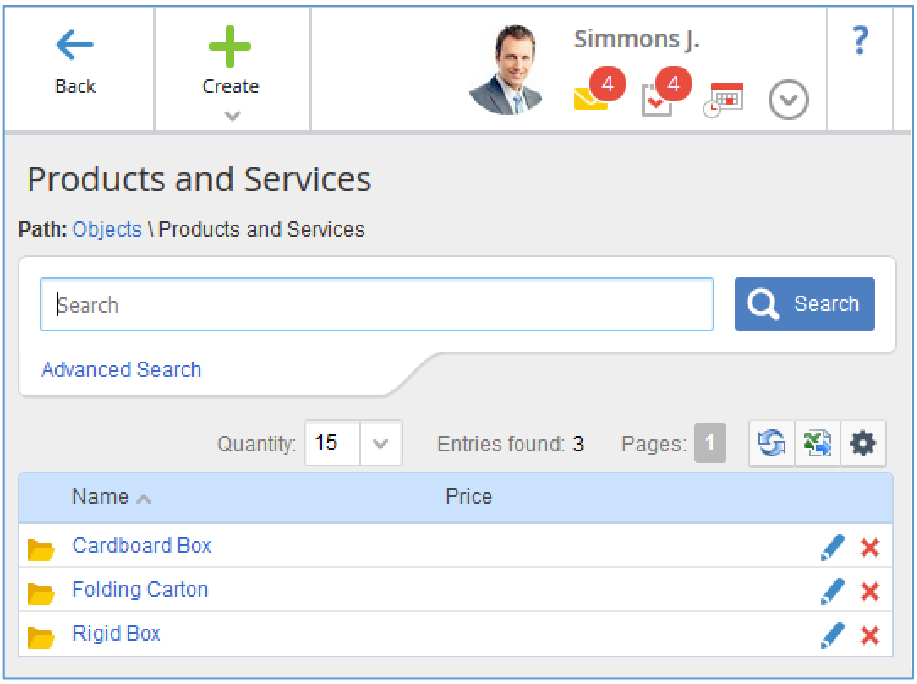


Fig. 49. Groups in the Products and Services object

To the top-level group 'Cardboard Box', add three more groups of a lower level: 'Single Wall', 'Double Wall' and 'Triple Wall' (thickness of a box).

First, open the group 'Cardboard Box', then click **Create Group,** add three new items and save each of them (Fig. 50).

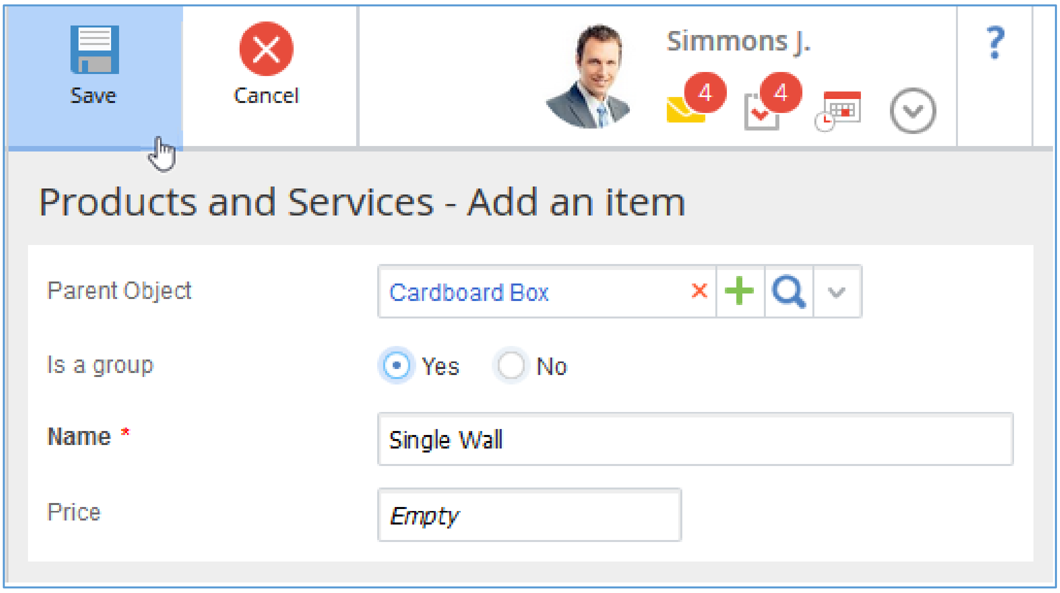


Fig. 50. Creating the second-level group in the Products and Services object

To navigate a treelike object, open the desired group. The breadcrumbs (Fig. 51) indicate the position of an item list in the object hierarchy. This is how the group 'Cardboard Box' of the **Products and Services** object should look like (Fig. 51):

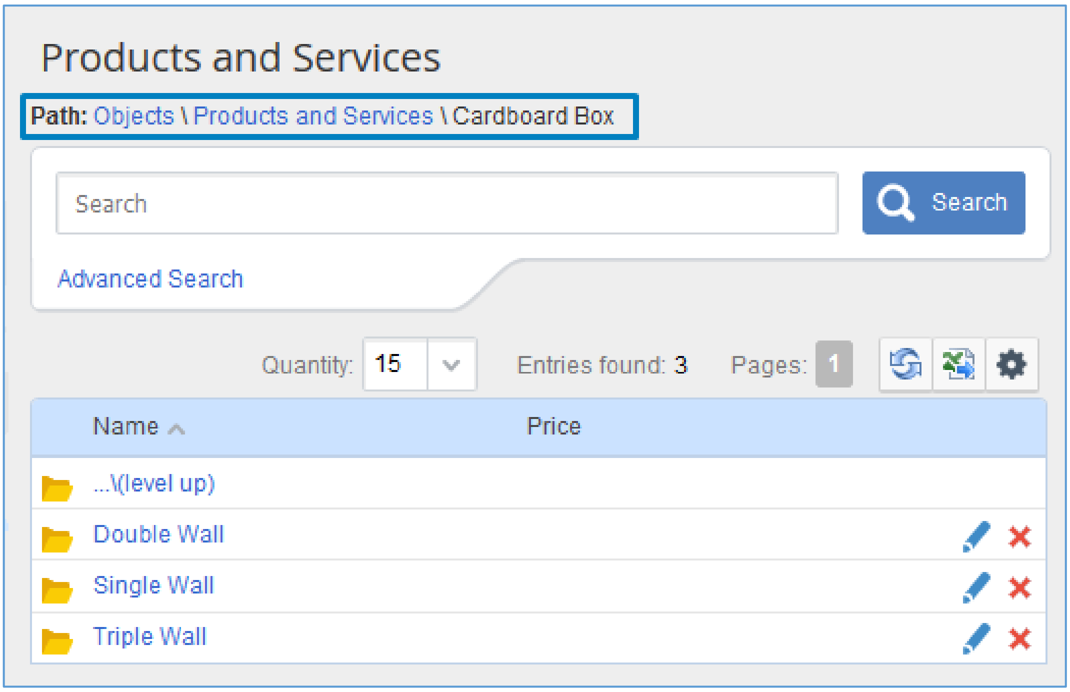


Fig. 51. Second-level groups in the object

Now we are done with configuring the group hierarchy in the **Products and Services** object.

The next step is to fill the groups with goods. To do so, go to the 'Single Wall' group and click **Create** in the toolbar (Fig. 47). Key in the **Name** and **Price** (Fig. 52).

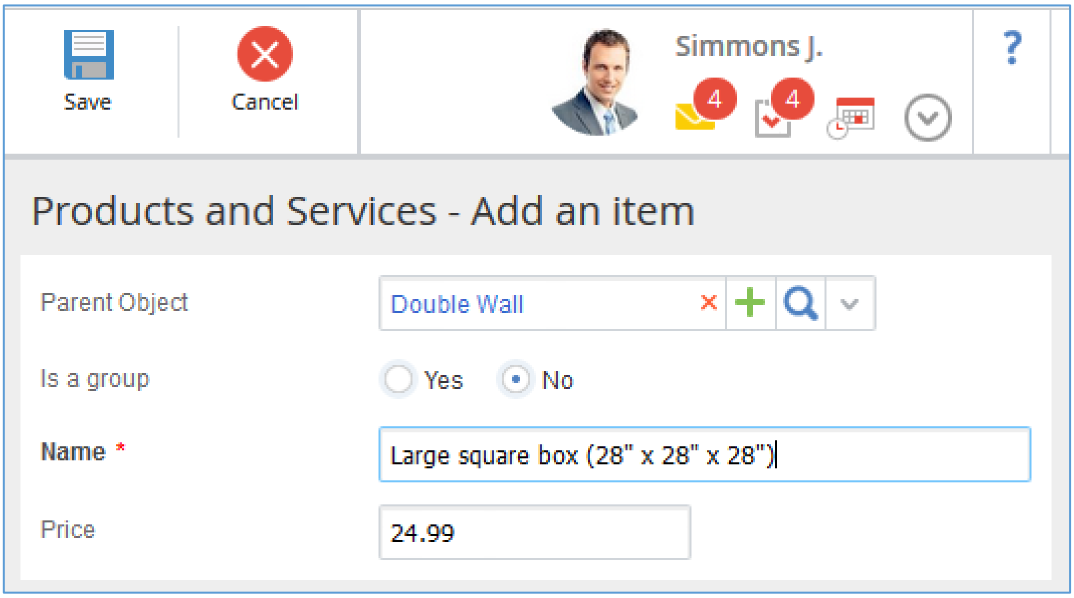


Fig. 52. Adding an object item (product)

When you click **Save** in the toolbar, the item will be added to the corresponding group.

Before we move on to further configuration, add a few more object items of your choice (Fig. 53).

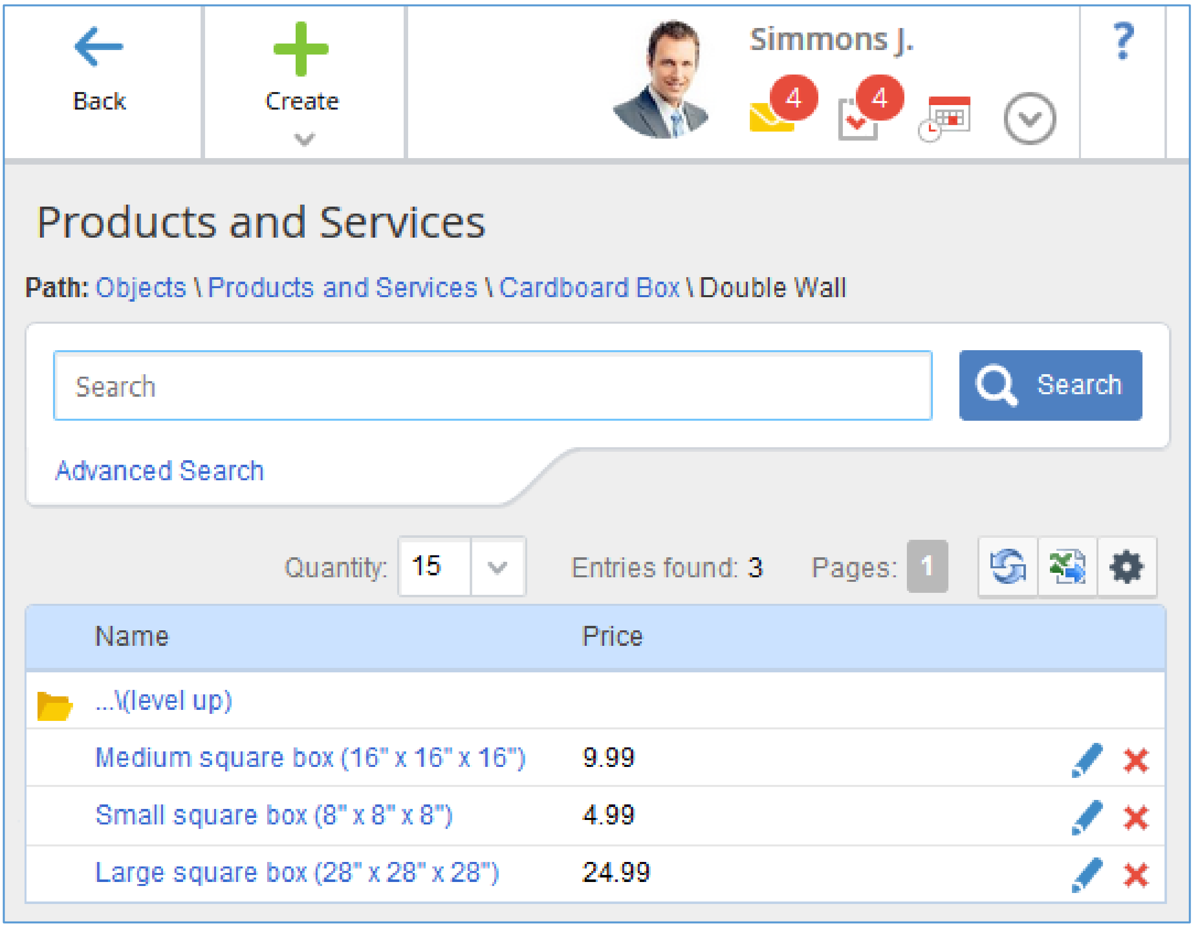


Fig. 53. Example of group items in an object

Now that we have configured the **Products and Services** object, you can add the names of goods and their quantity to deals. The system will automatically calculate the cost based on the standard prices specified in the object.

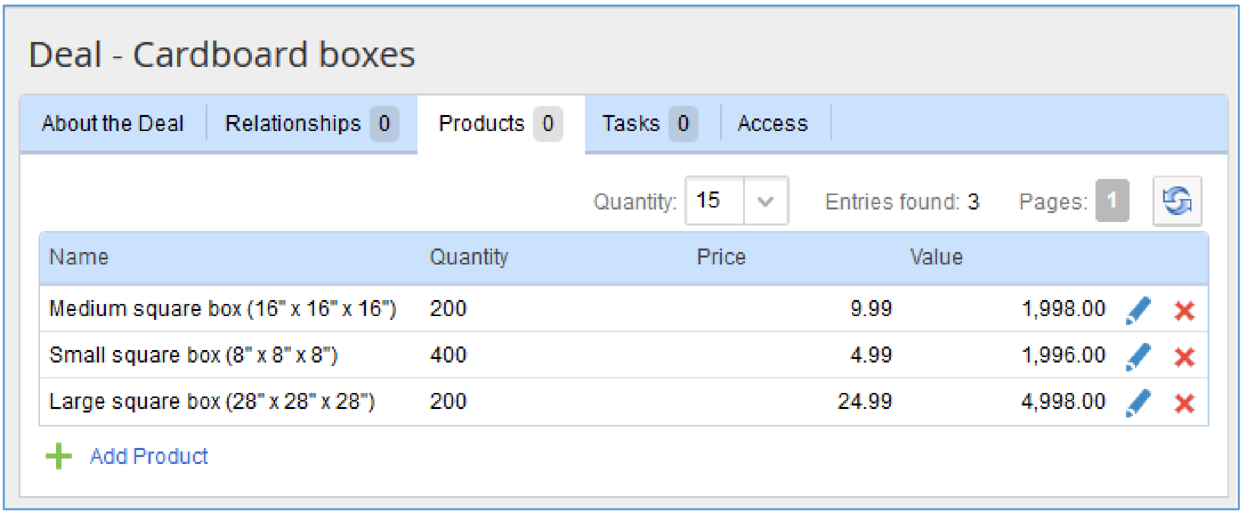


Fig. 54. The Products tab with items on a Deal page

Note that you can choose items from existing objects or add your own items. To do so, click **Add Product**. Bear in mind, though, that for this you need to have access permissions to objects. You can read more about this in this section of the ELMA Help.

3.4. Search and Filter Contractors and Deals

In the previous sections, we set up an object model and added object items so that you can manage contractors and deals in ELMA. The following sections will describe **ELMA CRM+** interfaces settings.

From this section you will learn how to create and configure filters to search **Contractors** and **Deals** in the system.

In ELMA, a **filter** is a saved set of advanced object search parameters. You can create filters only for those objects that you can search for (e.g. contractors, deals, contacts, etc.). For more details on filters, check this [ELMA Help page](#).

To create filters, let's use several previously created **Contractors** (see Table 1). Read Section 3.1 of this user guide to discover how to create them.

The best way to set up a new filter in the **CRM** section is to use the advanced search interface for the required objects. First, carefully check the search results and then save the settings as a filter. Below you will see how to create and save filters in the **Contractors** and **Deals** sections.

Let's assume that the filter tree of the **Contractors** and **Deals** has the following structure (Fig. 55):

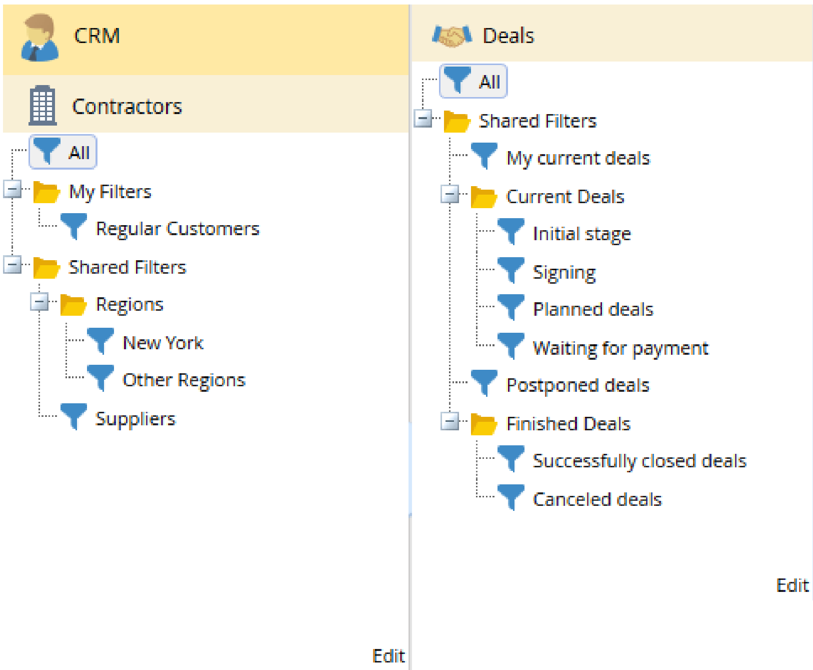


Fig. 55. Filter tree of the Contractors and Deals sections

In Table 2, you can find the information on search criteria that you need to use when creating and configuring the corresponding filters.

Table 2. A set of criteria for configuring filters in the Contractors and Deals sections

	Filter Name	Filter Criteria
Contractors	Regular Customers	Object Type – Contractor Type – Regular Customer
	Suppliers	Object Type – Contractor Type – Supplier
	New York	Object Type – Contractor Region Group – New York
	Other Regions	EQL search values: Region in (5, 2, 7, 3, 4, 6)
Deals	My Current Deals	Closed – No Responsible – Administrator
	Initial Contact Stage	Deal Stage – Interest in the product
	Signing the Contract Stage	Deal Stage – Signing the Contract
	Being planned	Deal Stage –Planning the Shipment
	Payment Stage	Deal Stage – Payment
	Postponed Deals	Status – Postponed
	Concluded Deals	Status – Closed (Success)
	Rejected Deals	Status – Closed (Failure)

Let’s take a look at how to create and work with the filters that were configured based on the parameters in this table.

3.4.1. Creating Custom Filters

Object **filters** are configured in their respective sections of the system web application. In our case, in **Contractors** and **Deals**.

Let's take the **Contractors** section as an example to illustrate how to create a filter. At this stage, the **Contractors** section page looks like this (Fig. 56):

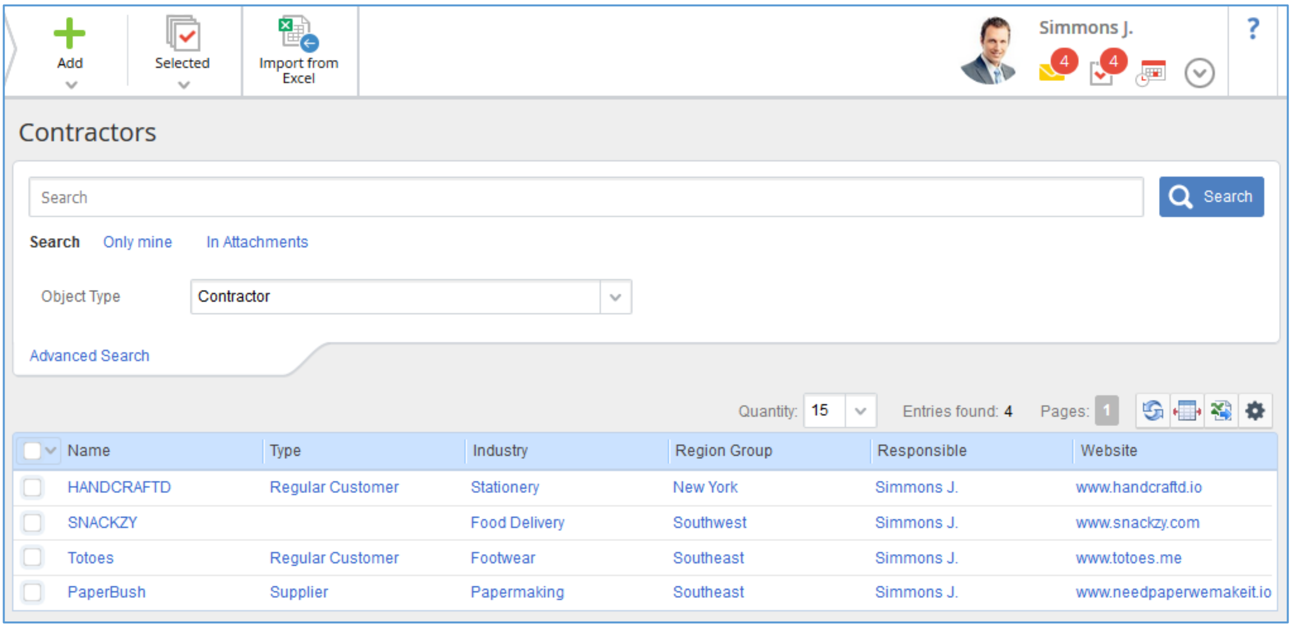


Fig. 56. Contractors section in the web application

Click the **Advanced Search** button under the search bar (Fig. 57) to create a **Contractor Filter.**

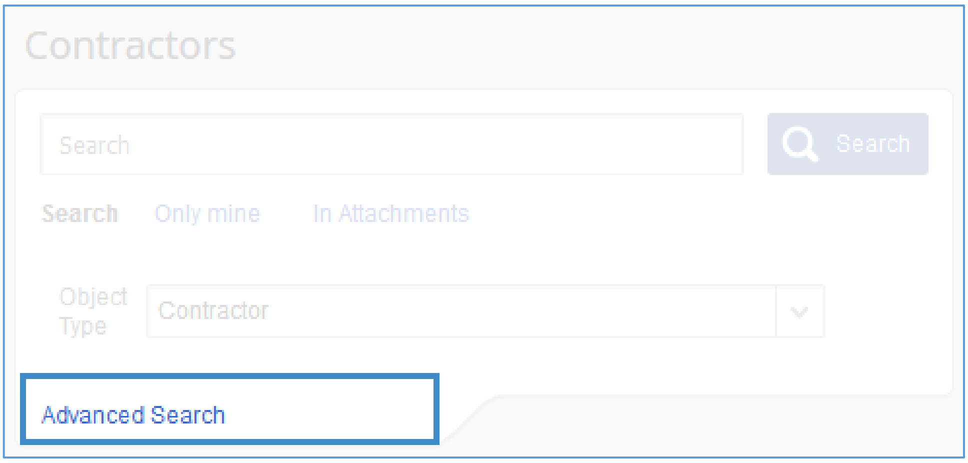


Fig. 57. Advanced Search

In the **Advanced Search** Panel, you will see all the properties that **Participate in Search (Filter)** (Fig. 35).

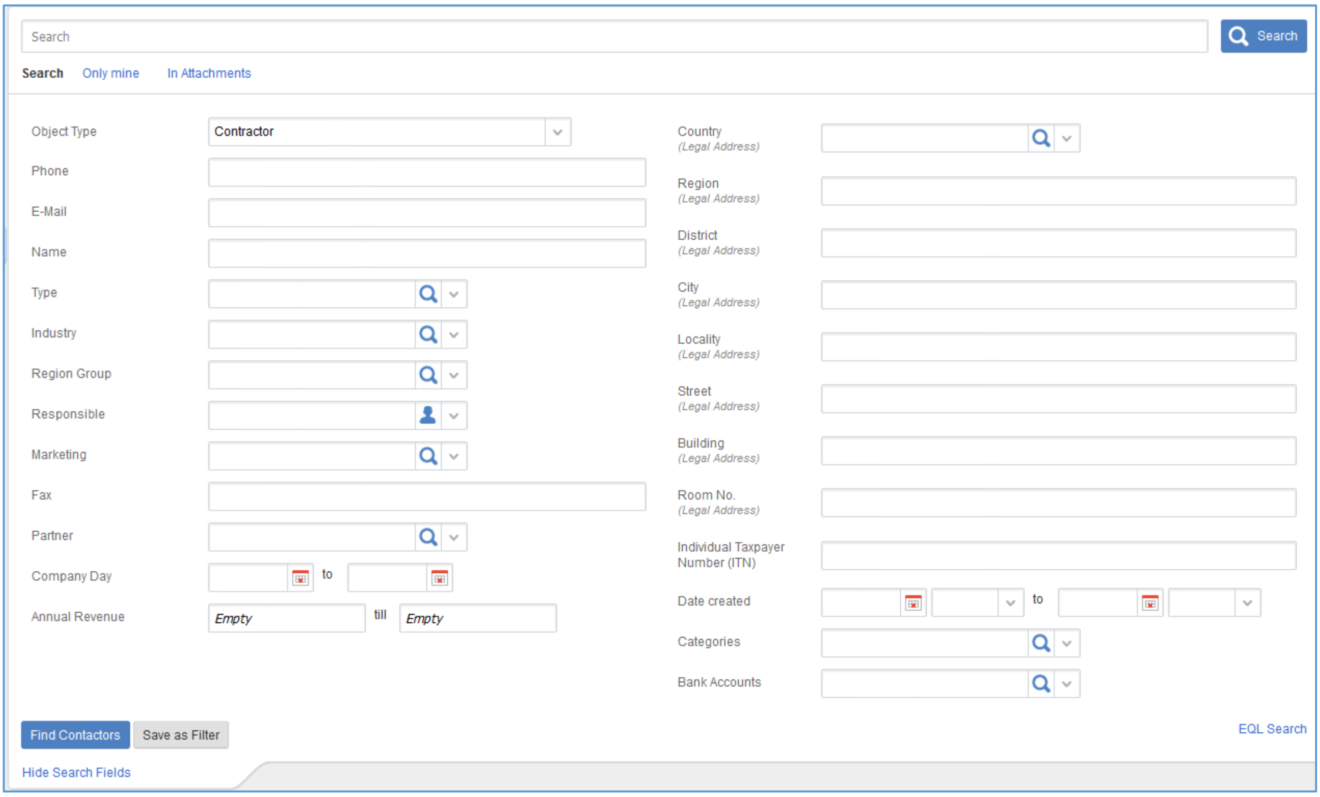


Fig. 58. Advanced search panel

The first filter must include all companies from New York. To do so, select the 'New York' value in the **Region Group** field. Then click **Find Contractors** and look through the list of contractors (Fig. 59).

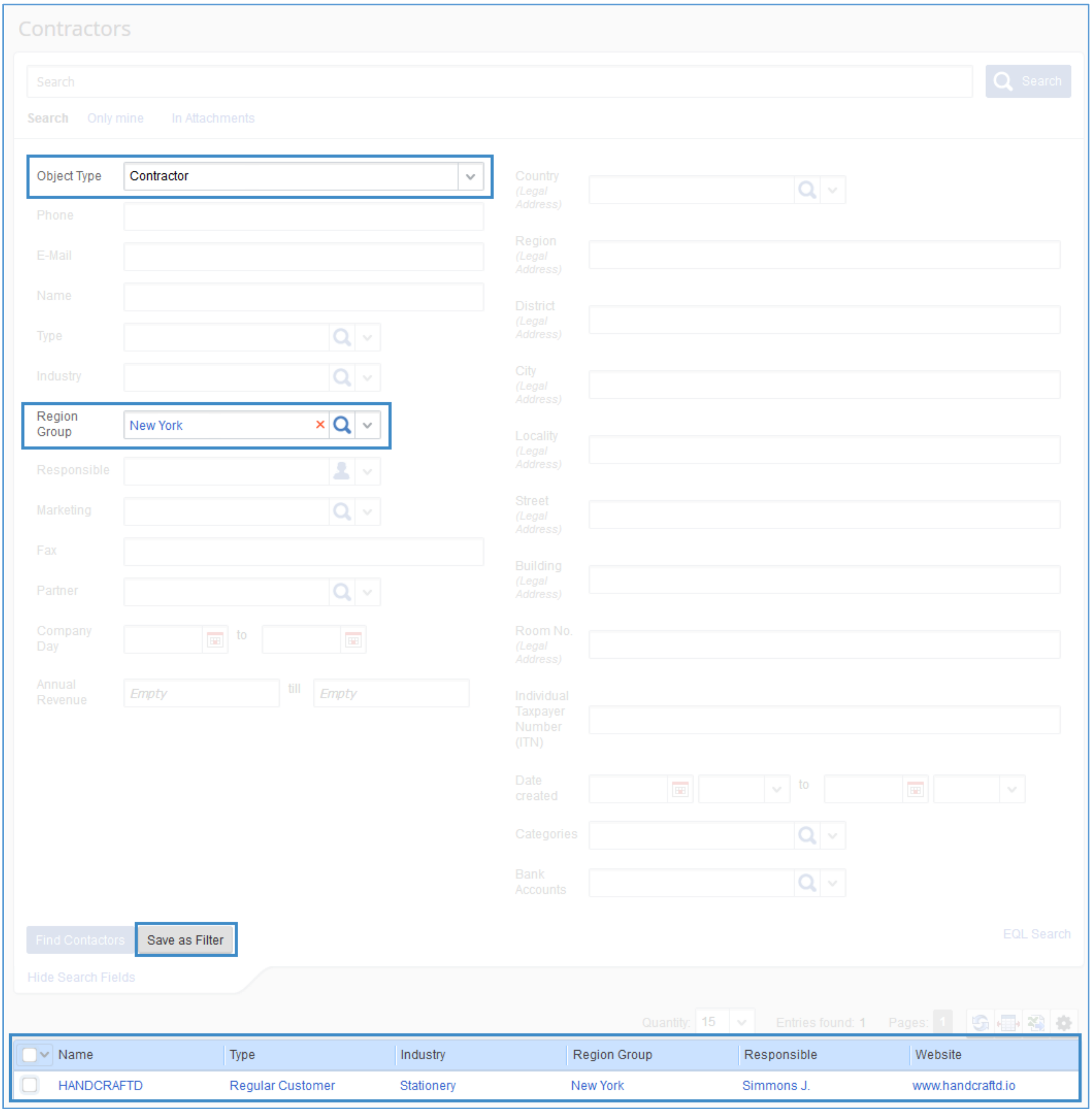


Fig. 59. Search results

In the search results, you will see the data you were looking for. To save and reuse the search parameters, click **Saved as a Filter** (Fig. 59).

In the dialog box that opens (Fig. 60), fill in the **Filter Name** field – 'New York' and check the list of **Selected Elements** to be displayed in the filter. **Selected Elements** are the fields by which you can search within a filter. Remove unnecessary fields to make the user interface cleaner. To do so, drag and drop the items from the **Selected Elements** column to the **Available Elements** column. In our case, this is not required.

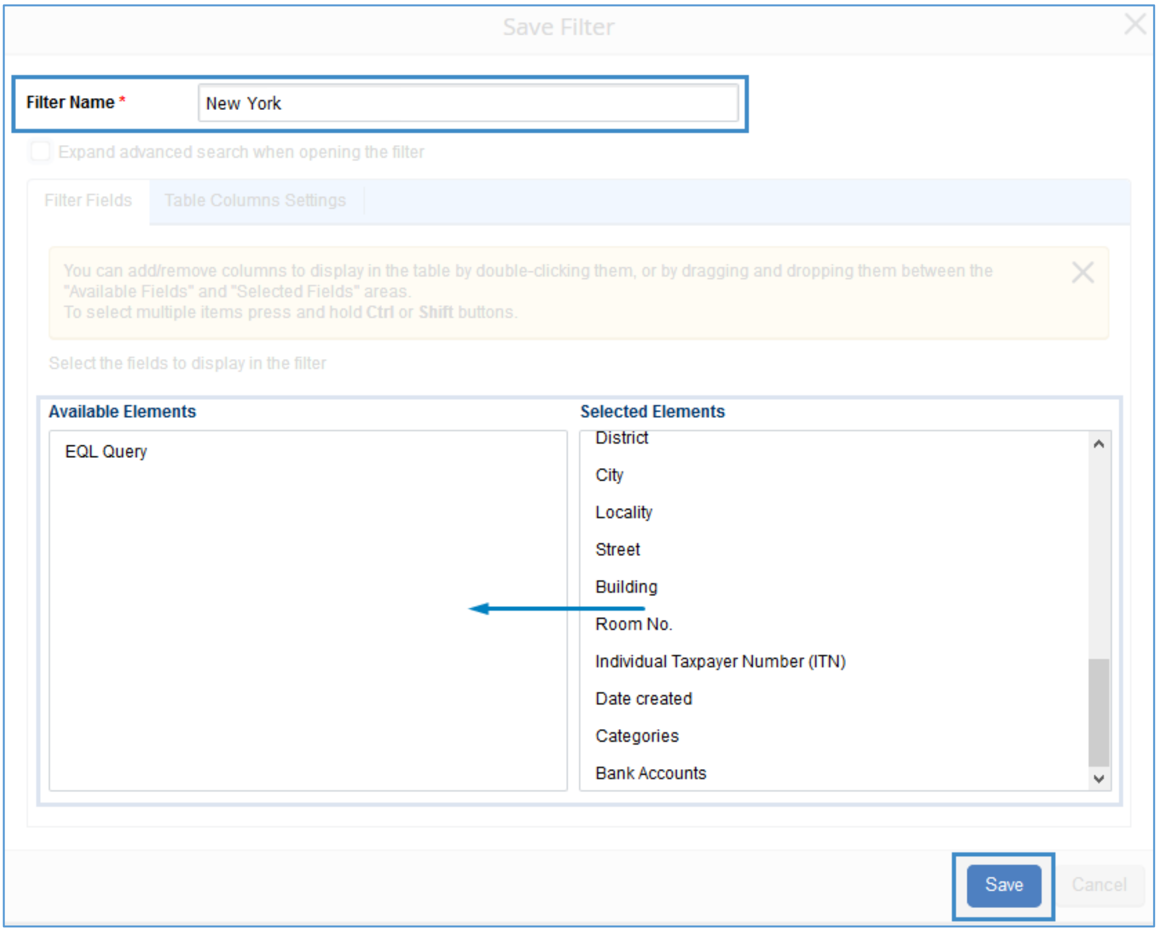


Fig. 60. Save filter settings

When you click **Save**, the **Filter** will be created. It will appear in the **CRM** section> **Contractors** > **My Filters** group (Fig. 61).

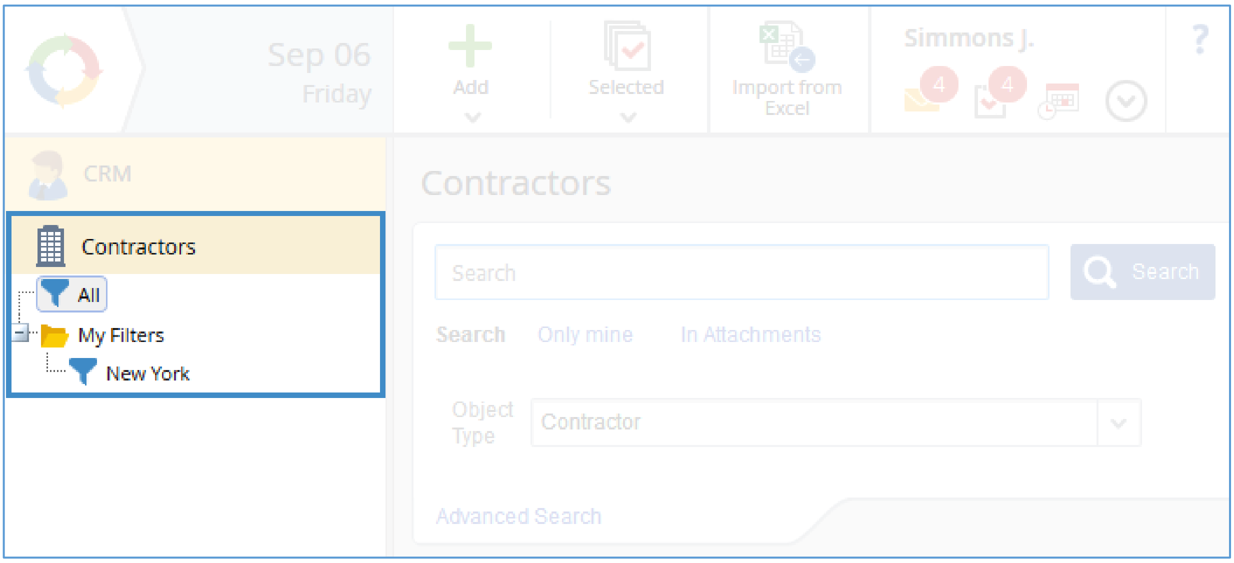


Fig. 61. Saved filter in the filter tree

Each user can create custom filters that will be available only to them in the **My Filters** folder. All custom filters are saved in this group by default. If you want all other **ELMA CRM+** users to see your custom filters, configure the filter tree (see Section 3.4.3).

In the same way, configure all the other filters in the **Contractors** and **Deals** subsections (you can find the input parameters in Table 2).

3.4.1.1 Using EQL Search

Sometimes you may need to create complex filters. For example, to display **Contractors** from all regions except New York (please refer to the previous section to find out how to set up standard filters Fig. 61).

The easiest way to do it is to use the special **ELMA Query Language (EQL)**. It allows you to set up filters with search criteria that are not included in the basic functionality of the filter settings.

To do so, go back to the **Contractor** advanced search (see Fig. 57). Click **EQL Search** in the bottom right corner.

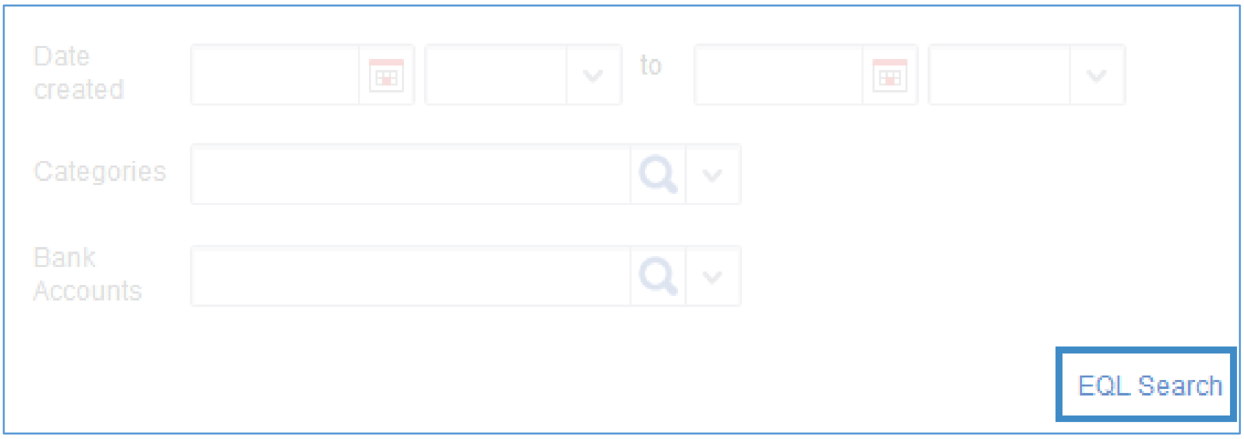


Fig. 62. EQL Search

In the field that opens, start typing your query – *'Region in'*. In this query, *Region* stands for the **Region Group**, which is the object that we filled in before (see Fig. 31). This field offers search suggestions.

Now in a search suggest drop-down list (Fig. 63), select the items that you want to add to the filter – all the Regions apart from New York.

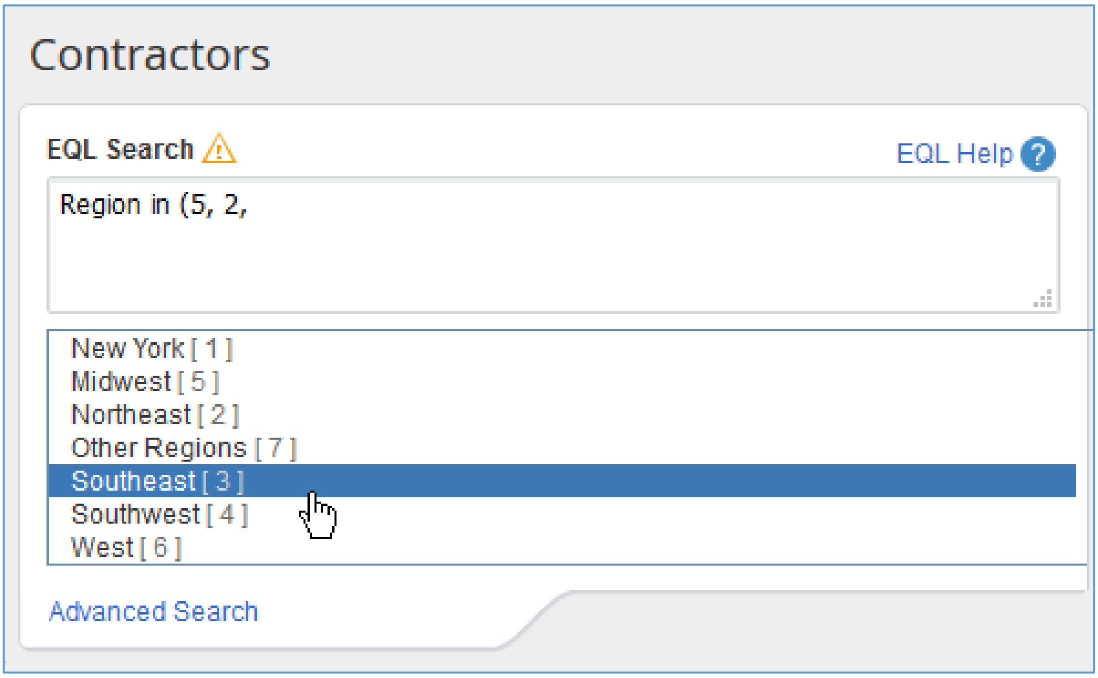


Fig. 63. Selecting items for a query

When an item is selected, its identifier will be inserted into the query text (see Fig. 63). The identifiers of object items are their serial numbers.

EQL Search can not only access static data from objects, but also filter data by the current user.

Using the logical operator 'AND' you can add the function *'Responsible = CurrentUser()'* to the previously created query *'Region in (5, 2, 7, 3, 4, 6)'*. Such filter will show contractors in the selected regions whose dedicated manager is the current user.

The final query will look like this: *'Region in (5, 2, 7, 3, 4, 6)* AND *Responsible = CurrentUser ()'*. The icon above the query field means that the query is written correctly. **Save** it **as Filter** with the name 'Other Regions'.

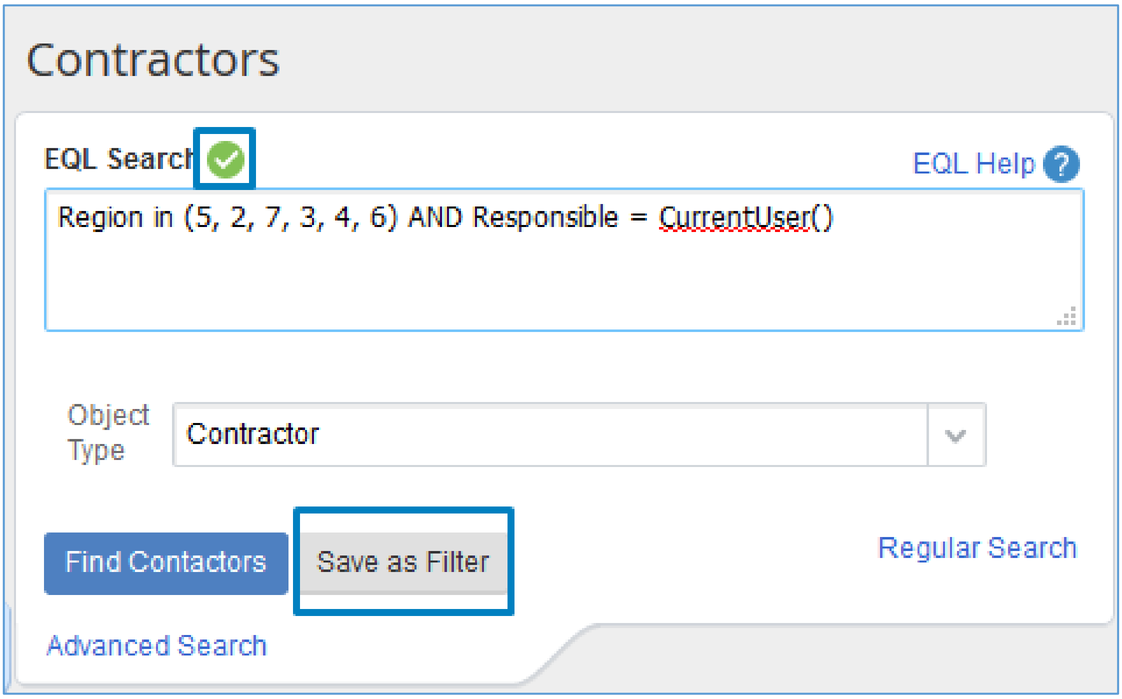


Fig. 64. Correct EQL Query

For more information on how and where to use **EQL Search,** see [this Help page.]()

When all the filters have been created, they will be displayed in the left menu as follows (Fig. 65):

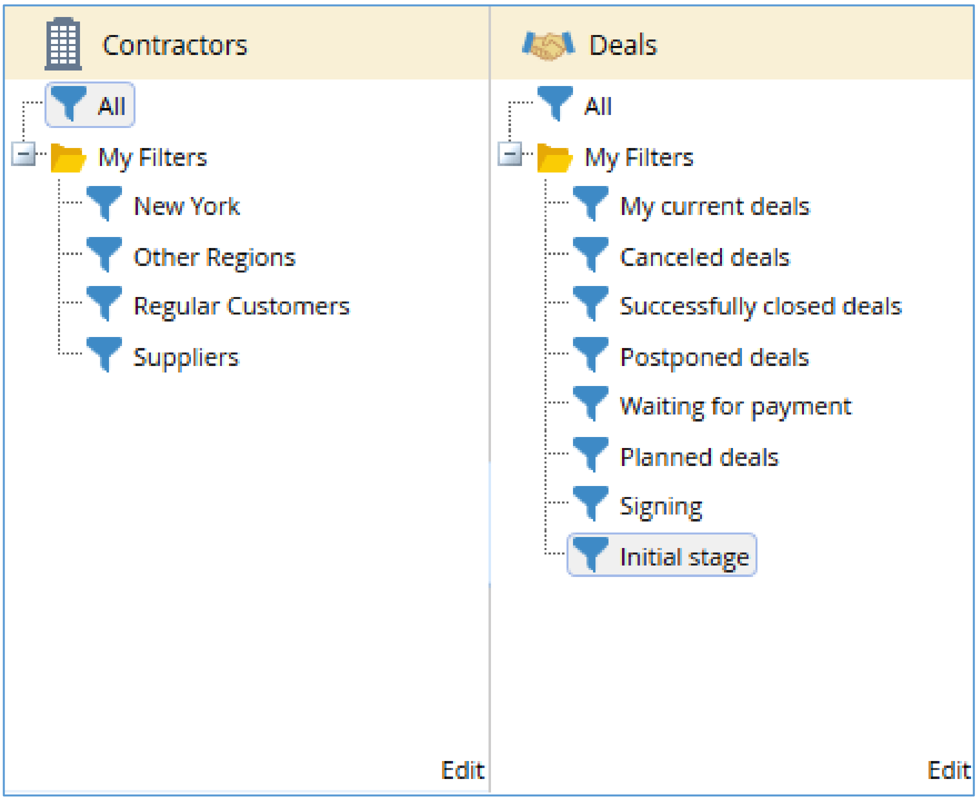


Fig. 65. Filters displayed in the left menu

In Section 3.4.3, we will take it one step further and configure the filter tree.

3.4.2. Advanced Filter Settings

In this subsection, we will consider advanced filter settings using the 'Suppliers' filter as an example. This implies configuring **Table Column Settings** and **Access Permissions Settings**.

You can change settings not only when creating a filter. Select the 'Suppliers' filter in the filter tree and click **Edit Filter** in the top toolbar (Fig. 66).

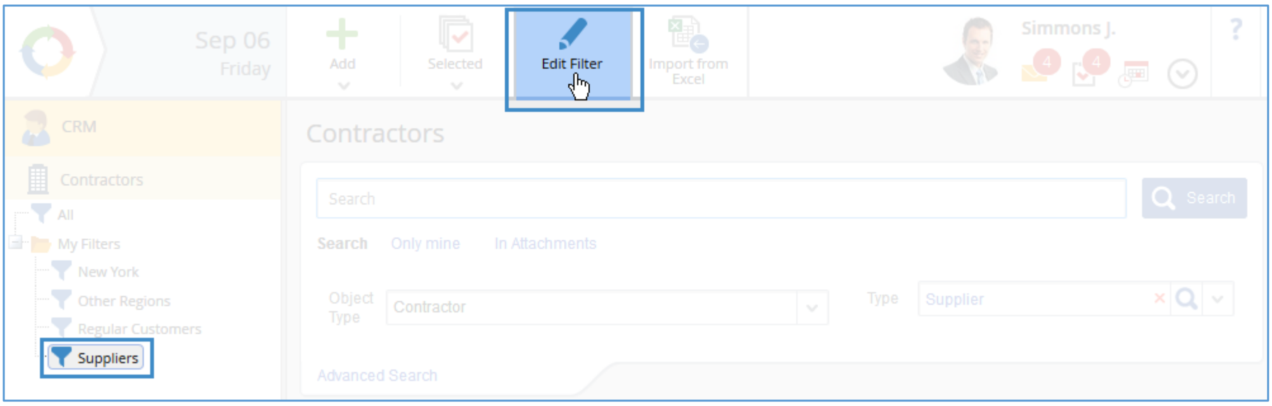


Fig. 66. Edit Filter button

3.4.2.1 Table Columns Settings

Let’s configure the Table Columns with a list of contractors for this filter. To do so, go to the **Table Columns Settings** tab (Fig. 67) and uncheck the **Use Default Settings** box. After that the tab will change.

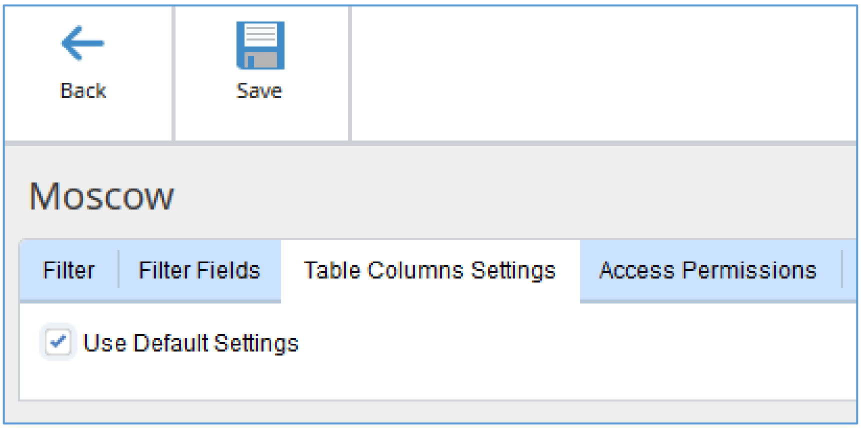


Fig. 67. Table Columns Settings tab on the Edit Filter page

Remove the **Industry** and **Responsible** properties (Fig. 68) from the **Selected Fields** column by dragging and dropping them to the **Available Fields** column or by clicking × to the right of the property. In our configuration, they will be of no use since the industry was specified while creating a filter and the identity of the **Responsible** user is not significant for the ‘Supplier’ contractor type.

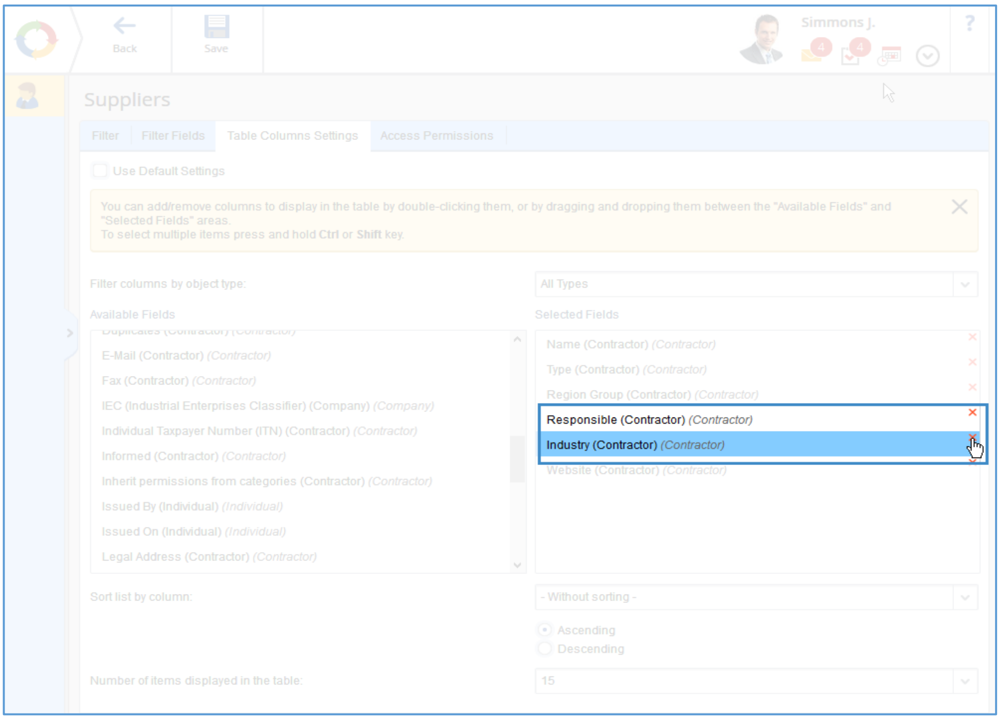


Fig. 68. Removing columns from the table

To apply changes, click **Save** in the toolbar.

3.4.2.2 Access Permissions Settings

By default, only the Administrator or the author of a filter can edit it, but it is sometimes necessary for the key employees to work and configure this filter as well. Let's give access permissions to the Chief Commercial Officer so that they can edit the 'Suppliers' filter.

First, open the **Edit Filter** page and go to the **Access Permissions** tab (Fig. 69).

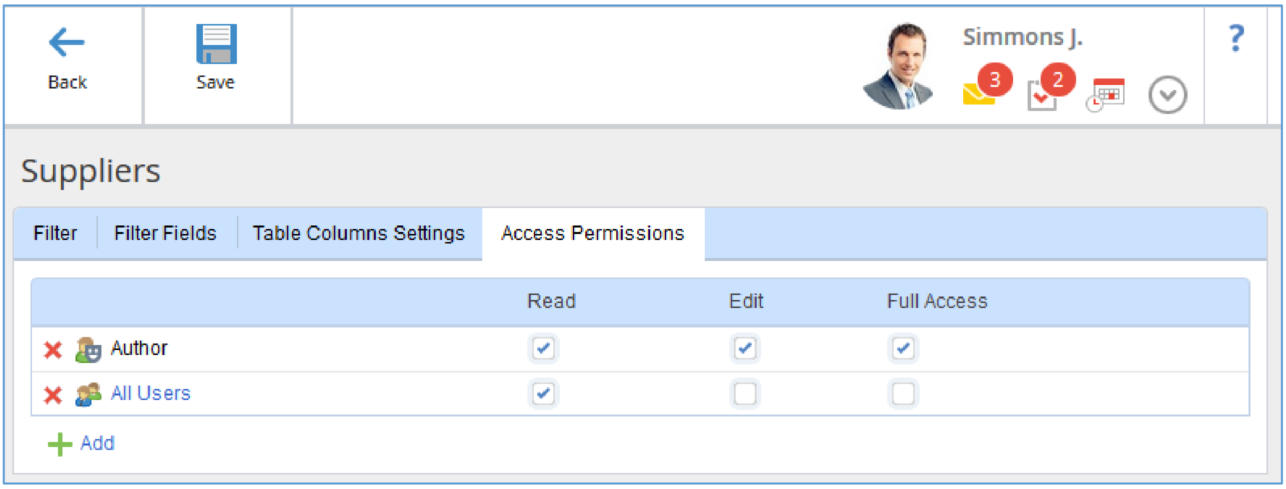


Fig. 69. Access Permissions tab on the Edit Filter page

Click **Add** at the bottom of the permission list and in the window that opens select the position CCO (or another appropriate) (Fig. 70).

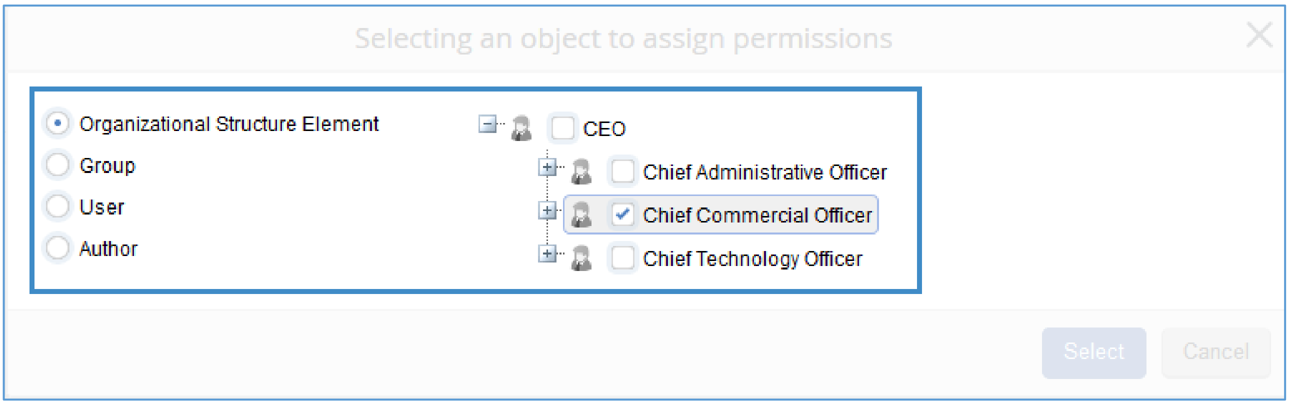


Fig. 70. Selecting a position to assign permissions

Give **Full Access** permissions to the added position by checking the corresponding box. Then **Save** the filter (Fig. 71).

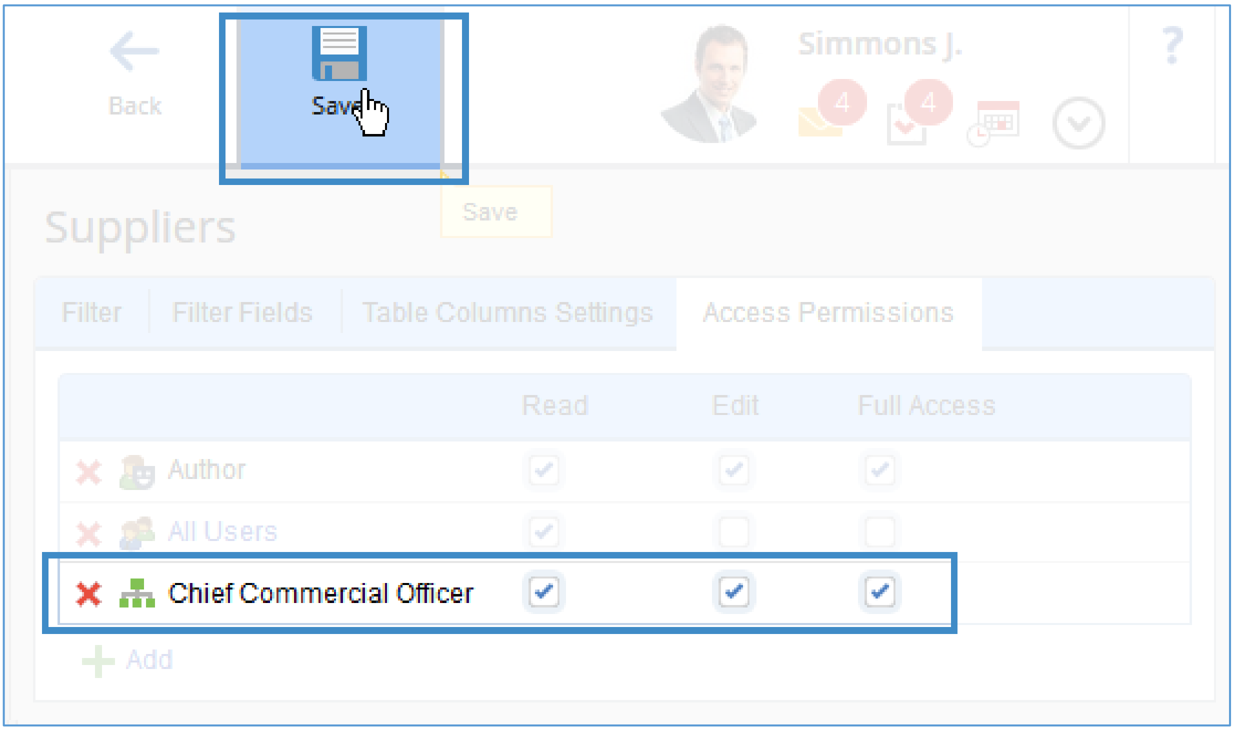


Fig. 71. Saving the filter with new permissions

Additionally, you need to move the configured filter to **Shared Filters**. Below you can read how to configure the filter tree.

3.4.3. Configuring a Filter Tree

The final step is to put the configured filters into the shared filters folder. They are currently in the **My Filters** folder. Here they are available only to one user – the one who created them. At the same time, the system allows users to access other users' personal filters via a direct link (all users have permissions to **View** personal filters).

In our example, it is necessary that all users of the ELMA CRM+ application see this filter.

To do so, click **Edit** at the bottom of the filter tree. On the **Edit Filter Tree** page that opens, drag and drop the 'Regular Customers' filter to the **Shared Filters** folder (Fig. 72).

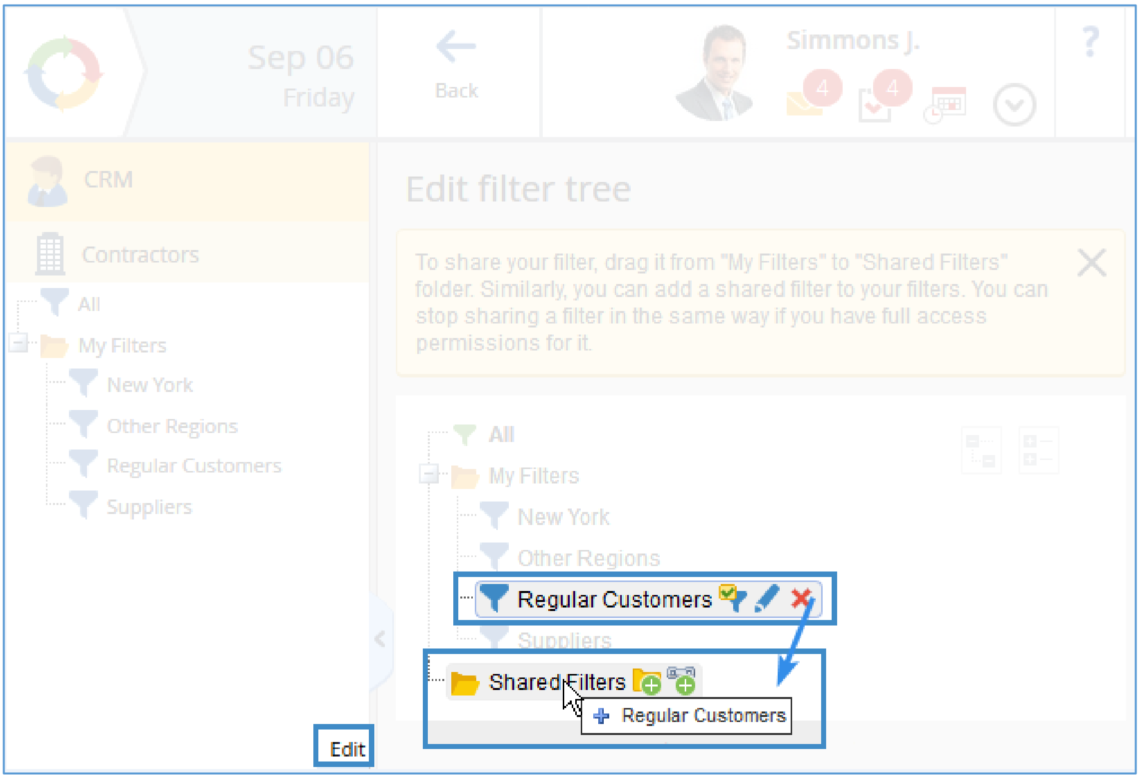


Fig. 72. Editing filter tree

This is how you can move filters in the tree. Our goal is to arrange the filters as they are in the hierarchy in Fig. 55. To add a new folder, click the button to the right of the **Shared Filters** folder.

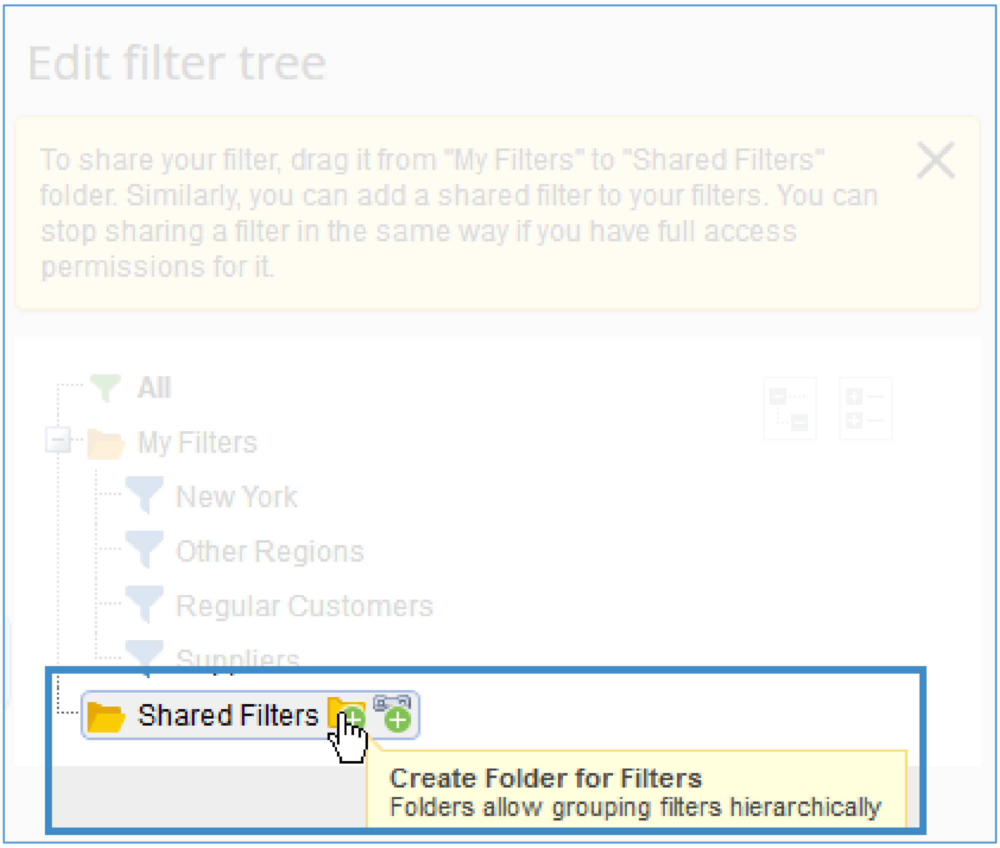


Fig. 73. Adding a folder to Shared Filters

In the dialog box that opens, enter the folder name – 'Regions' (Fig. 74).

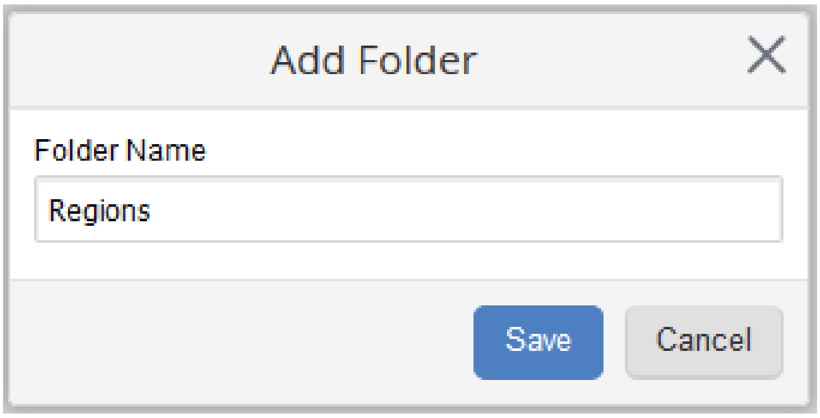


Fig. 74. Enter the name of the folder you want to add

Click **Save** to create the folder.

Drag the filters onto the corresponding folder until you get a tree like that (Fig. 75):

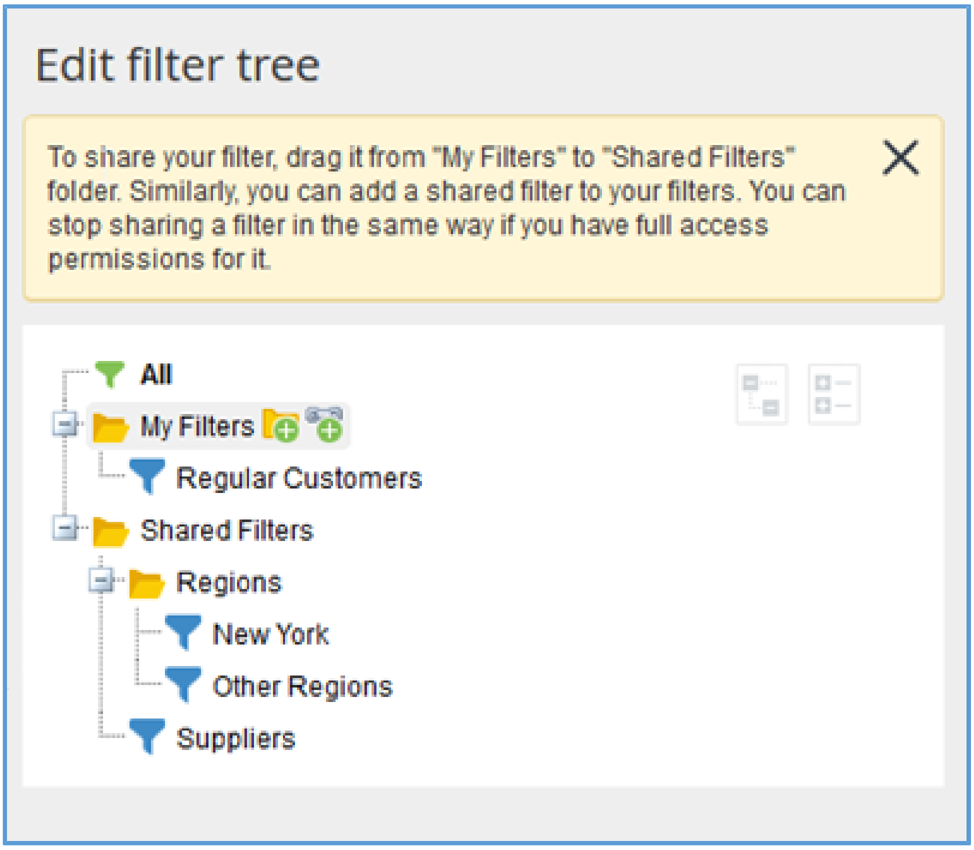


Fig. 75. Configuring filter tree

All changes are saved automatically: once you've configured the tree, just click **Back** in the top toolbar to return to the **CRM** section.

Now let's open the **Deals** section, create two folders 'Current Deals' and 'Closed Deals', and drag the previously configured filters to these folders.

In Fig. 55 you can see how the filter trees in the **Contractors** and **Deals** sections should now look.

To find out more about how to create and configure filters, see [this ELMA BPM Help page].

3.5. Creating Interfaces for Working with CRM

Once you created objects and configured filters, you can customize user interfaces. This subject is discussed in more detail in the User Manual on the Web Portal. In this section, we will explain how to create a custom main page with portlets, add a user group that will be able to access this page, and how to give access permissions to it.

3.5.1. Creating a User Group

Before you start configuring interfaces, create user groups to which you will later on give different access permissions. To open the user group settings page, go to the **Administration** section – the **Users** portlet – **Group List** (Fig. 76).

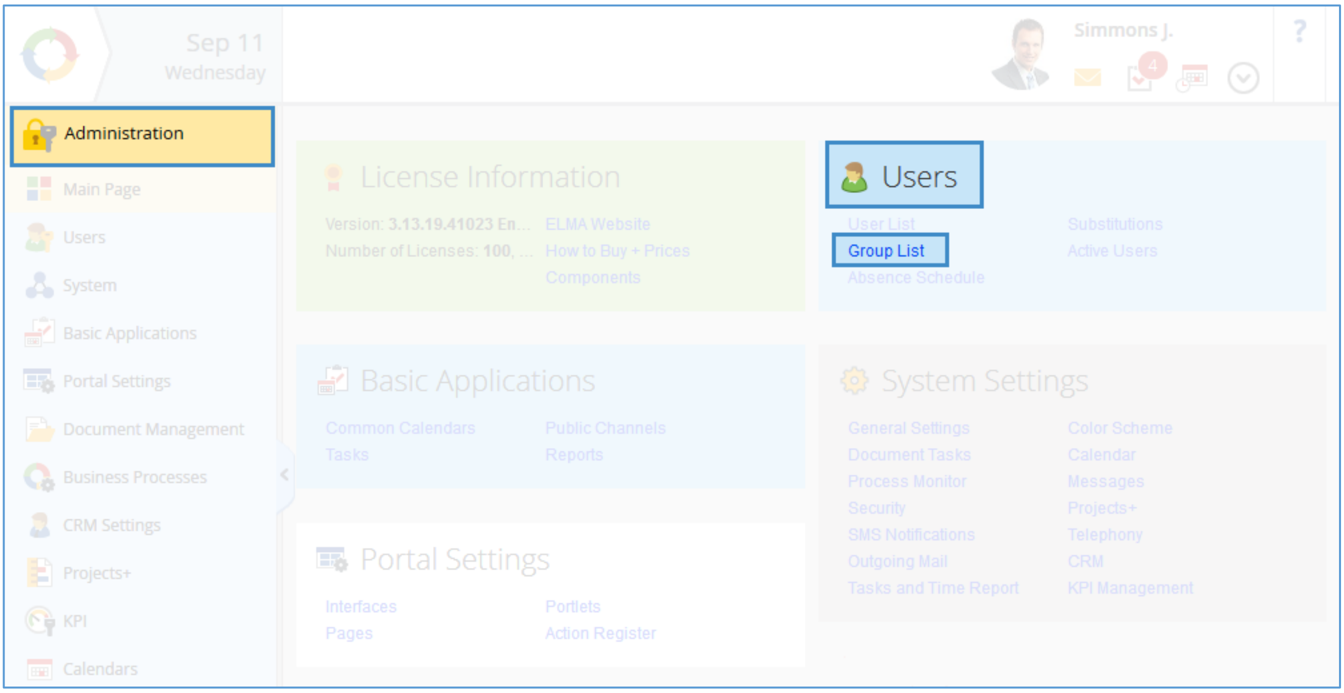


Fig. 76. Link to the group settings page

Now let's **Add** a new **Group** by clicking the corresponding button in the top toolbar (Fig. 77).

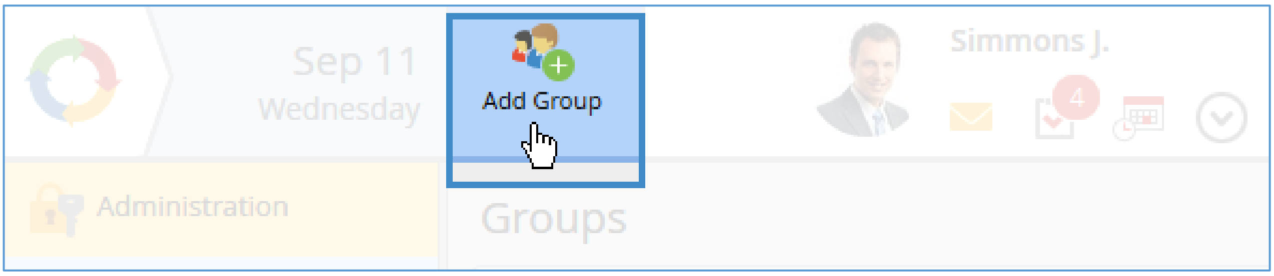


Fig. 77. Add Group button

While configuring the group, add a few **Job Positions** that will make up the commercial division (Head of Sales, Employees of the Sales Department and CCO). First, check the required checkboxes and then click **Select** (Fig. 78). Note that this is just an example in other cases the org chart may be different.

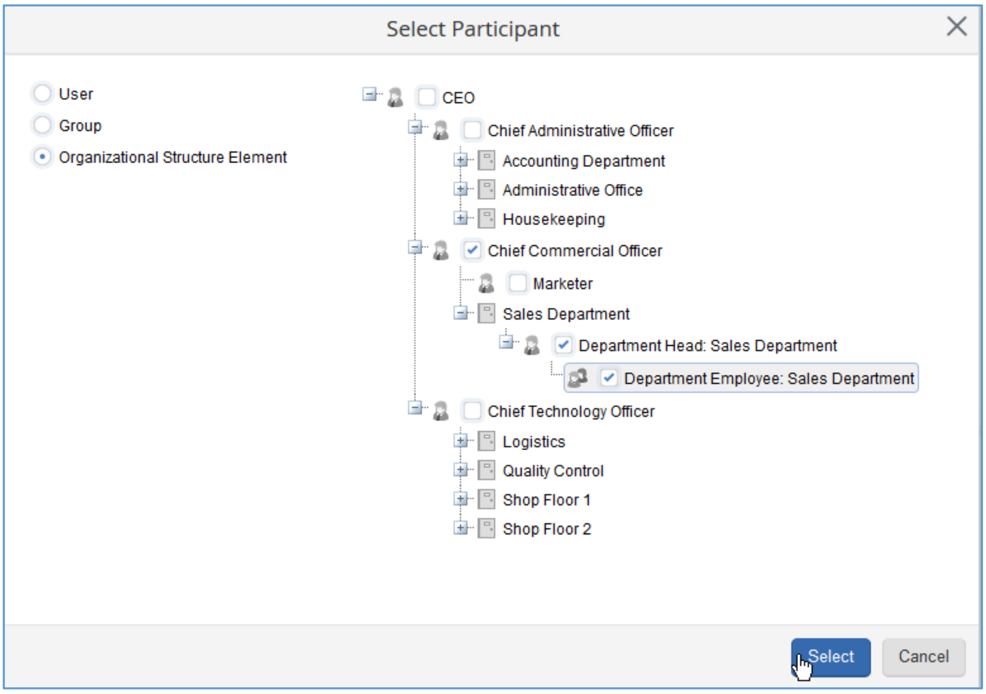


Fig. 78. Adding a position to the group

Enter the **Group Name** and then **Save** the group (Fig. 79).

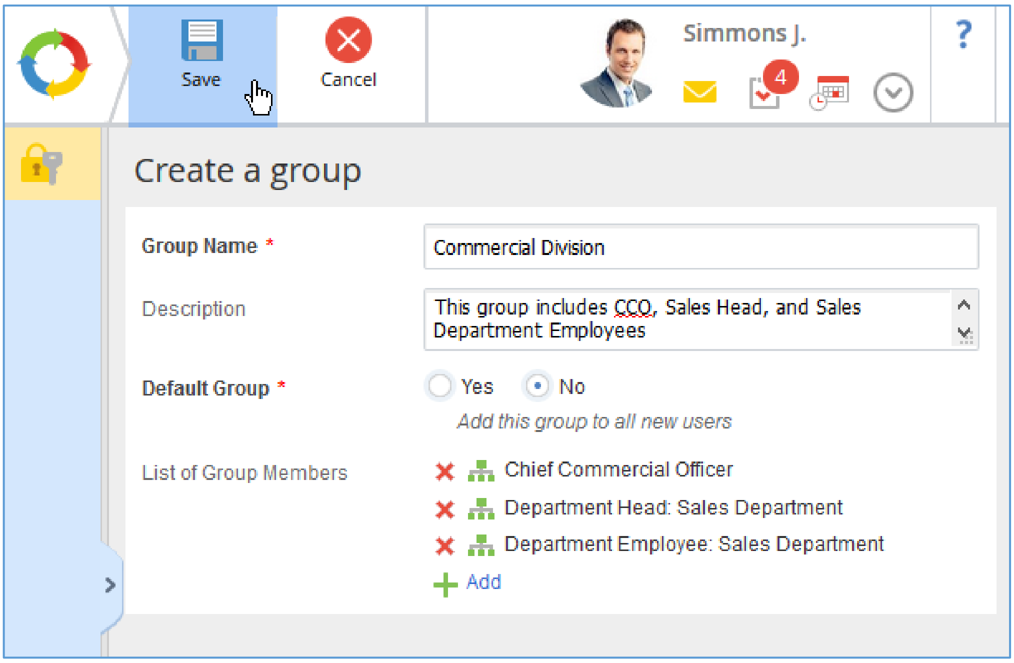


Fig. 79. Saving a user group

3.5.2. Creating and Setting Up the Main Page

Main pages are basic interface elements. They appear as a set of tabs and help users quickly access important and frequently used information on the ELMA portal. To set up pages, go to **Administration – Portal Settings – Pages** (Fig. 80).

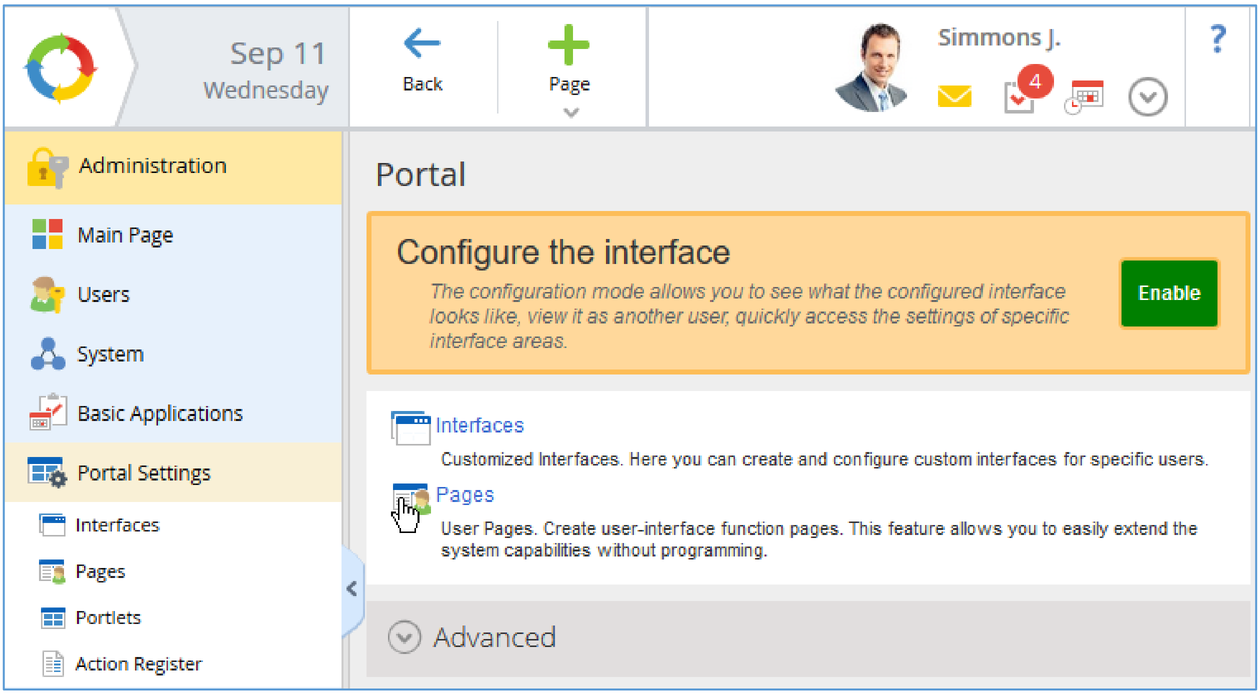


Fig. 80. Configuring main pages

Select **Main Pages** to configure their interface (Fig. 81).

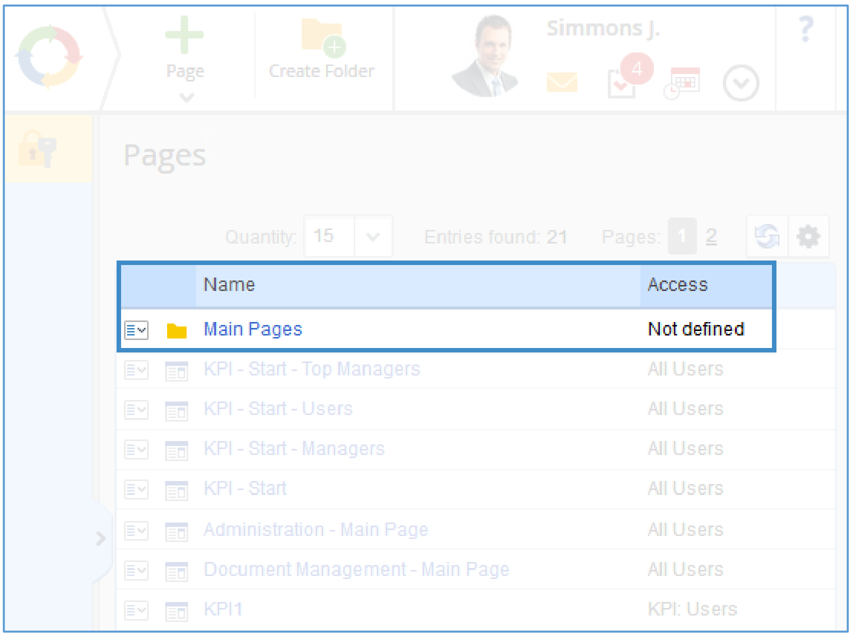


Fig. 81. List of customizable pages

3.5.2.1 Creating a Page

In ELMA, you can create three types of pages:

- **Portlet Pages** are pages with widgets that display specific information;
- **Text Pages** are portlet pages that, by default, contain an HTML portlet;
- **Role Pages** are dynamic pages that display different information depending on the user role.

A **portlet** is pluggable user interface components that is managed and displayed in the web portal. You can tailor portlets to meet each user's needs.

In the example below, we will configure a portlet page with portlets for a sales rep. Go to the **Main Pages** folder. It already contains a default main page **(Main).** Let's create a new one: click **Portlet Page** in the drop-down menu of the **Page** button (Fig. 82).

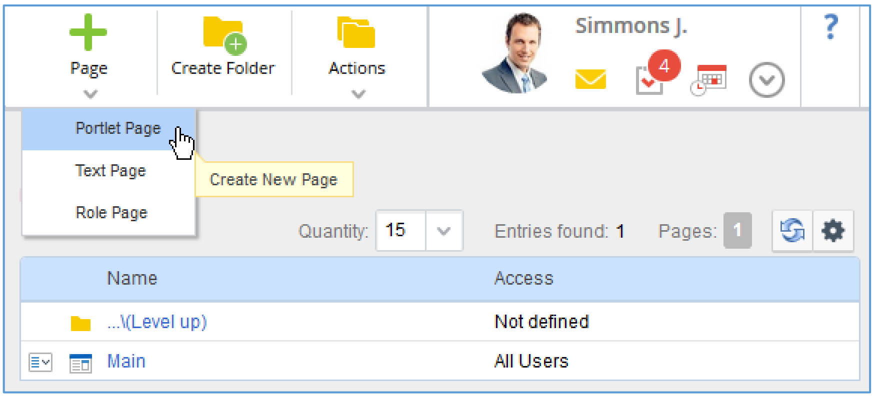


Fig. 82. Creating a portlet page

Enter 'Customers' in the **Name** field and select 'Two columns' as a location (Fig. 83). **Location** is the page layout, i.e. the number of columns that will feature the portlets you will add.

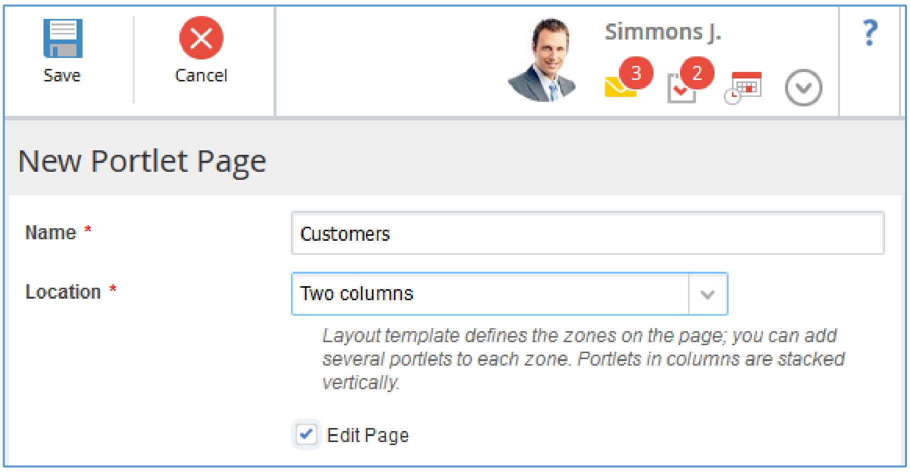


Fig. 83. Creating a new portlet page

Click **Save** in the top toolbar to create the **Portlet Page.** You will be automatically redirected to the **Configure Portlet Page** interface.

3.5.2.2 Configuring a Portlet Page

Let's start configuring the page: add the 'Deals' and 'Filter' portlets. To do so, click **Add Portlet** in the toolbar (Fig. 84).

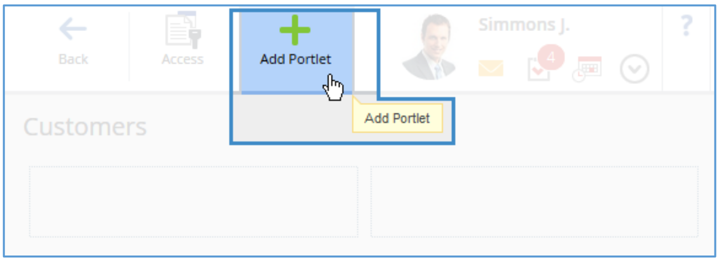


Fig. 84. Add Portlet button

In the portlet catalog that opens, choose 'Deals' and click **Add Portlet** (Fig. 85).

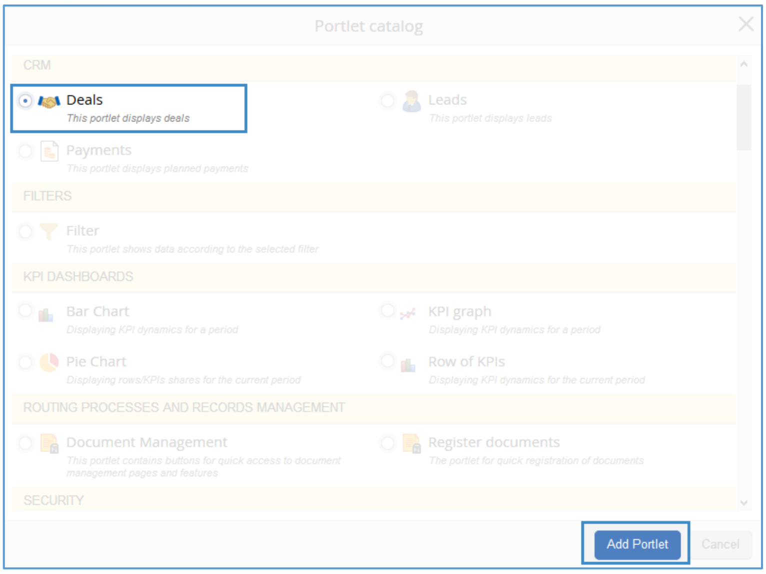


Fig. 85. Adding the Deals portlet

Then add the 'Filter' portlet in exactly the same way.

Use drag and drop to place the created portlets in two different columns (Fig. 86).

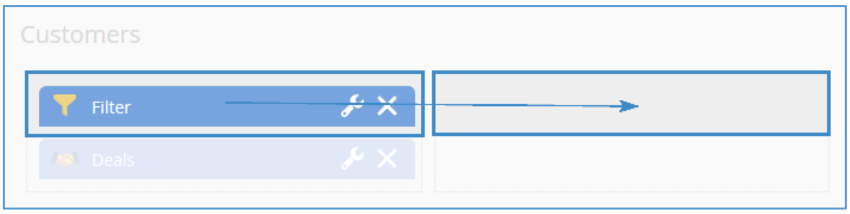


Fig. 86. Changing the position of the portlet on the page

To open a portlet's settings, click the wrench icon to the right of the portlet name (Fig. 87)

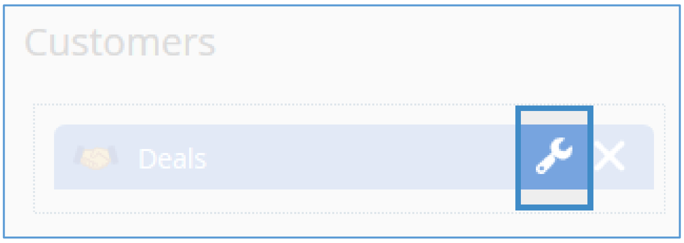


Fig. 87. Deals portlet settings icon

In the window that opens, select the **Filter to display –** 'My current deals', specify the **Name –** 'My Deals', and then click **Save** (Fig. 88).

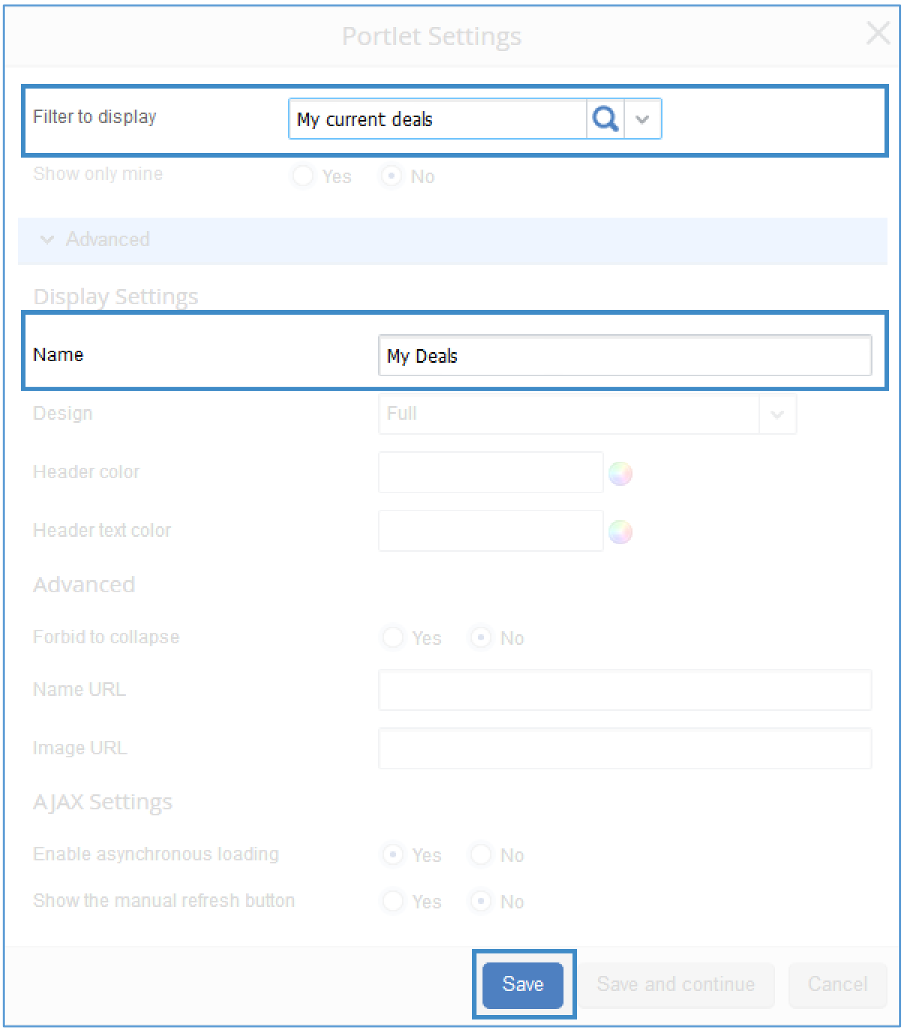


Fig. 88. Deals portlet settings

Now let's configure the Filter portlet. First, select the filter to display. For example, 'Regular Customers' in the **Contractors** section (Fig. 89).

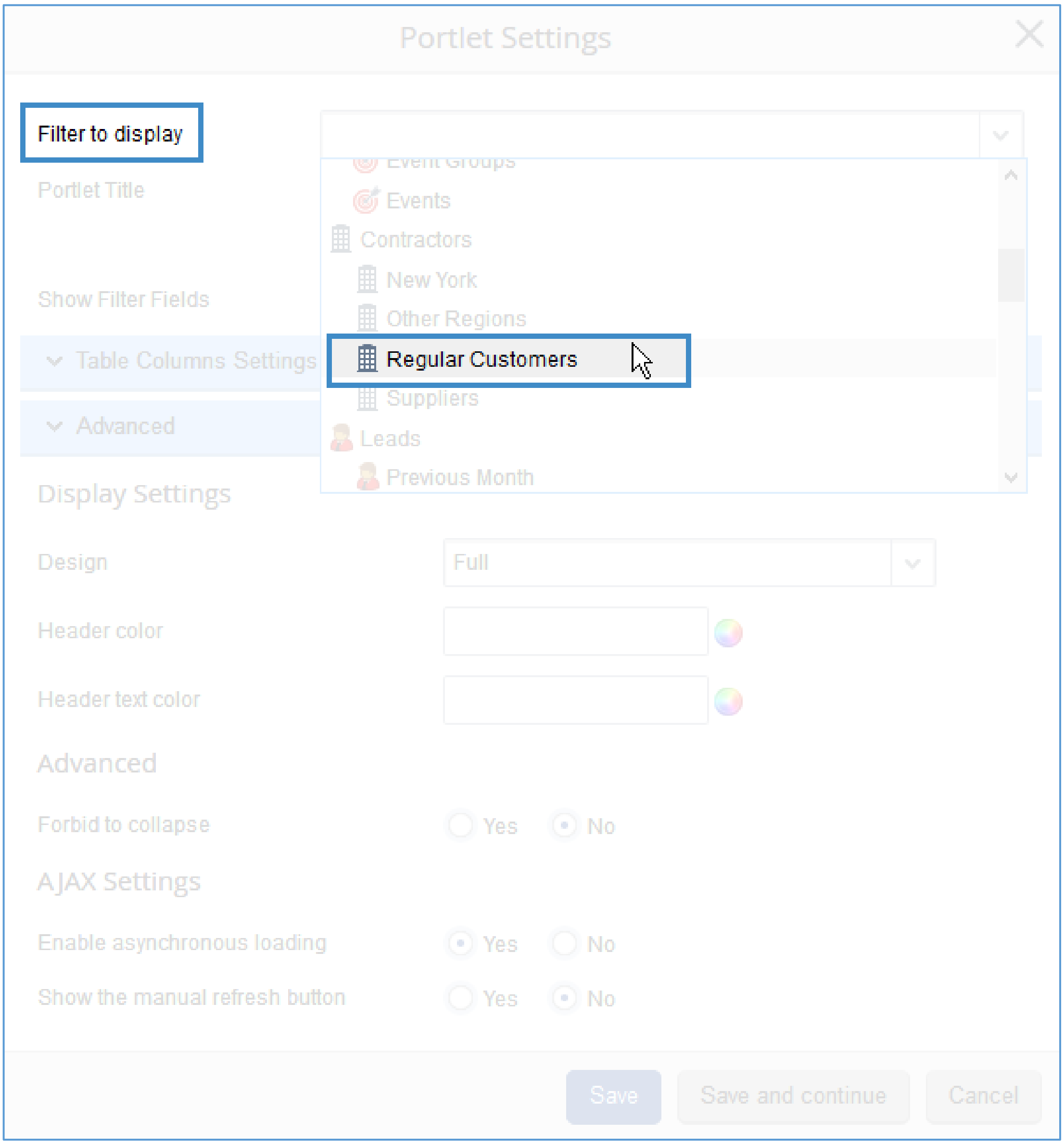


Fig. 89. Selecting a filter to display in the Filter portlet

After that enter in the **Portlet Title** ‘Regular Customers’ and **Save** the settings (Fig. 90).

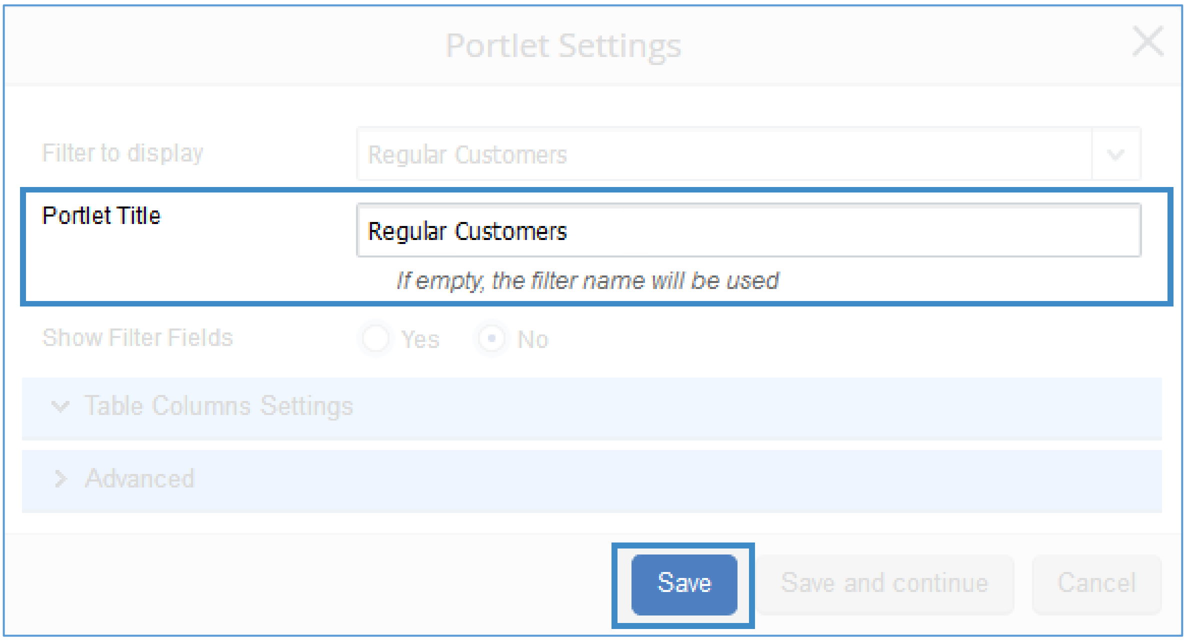


Fig. 90. Saving the Regular Customers portlet settings

3.5.3. Configuring Access to a Page

In ELMA, you can give access permissions for pages not only to individual users and/or org chart elements, but also to user groups. For example, the previously configured 'Commercial Division' user group. Read Section 3.5.1 to learn how to create a user group.

To grant access permissions to the 'Commercial Division' user group, go to **Administration – Users – Groups** (Fig. 91).

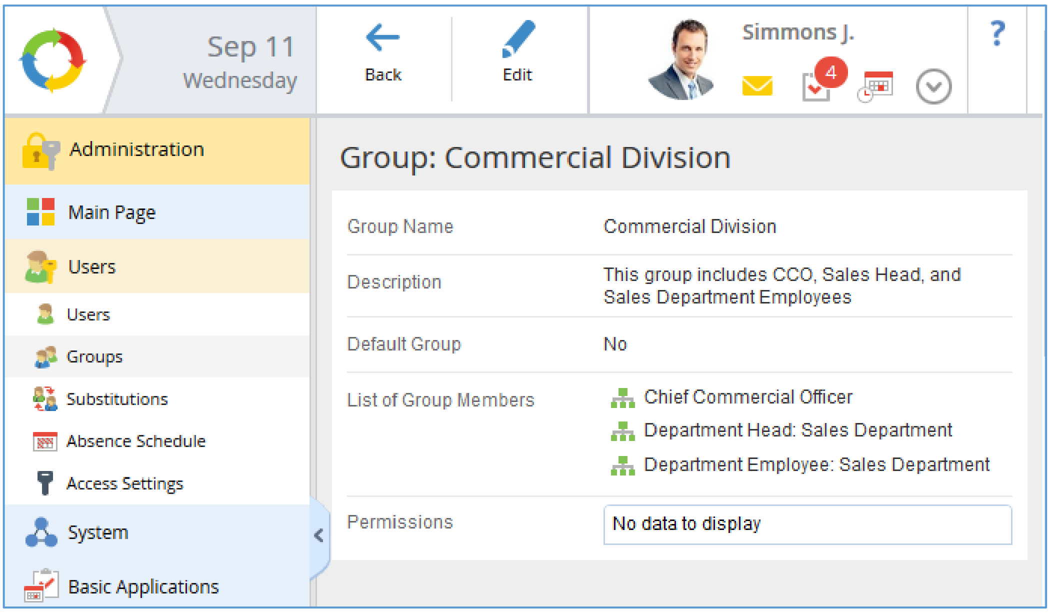


Fig. 91. Commercial Division user group in the Administration section

For more detail on how to work with groups, org chart and users, read the User Manual on the ELMA Web Portal.

Let's restrict the access permissions to this main page so that only users of the 'Commercial Division' group can see it. To do so, go to **Administration – Portal Settings – Pages**. Find the 'Customers' page in the **Main Pages** folder. Click the context menu icon to the left of the page name and select **Access** (Fig. 92).

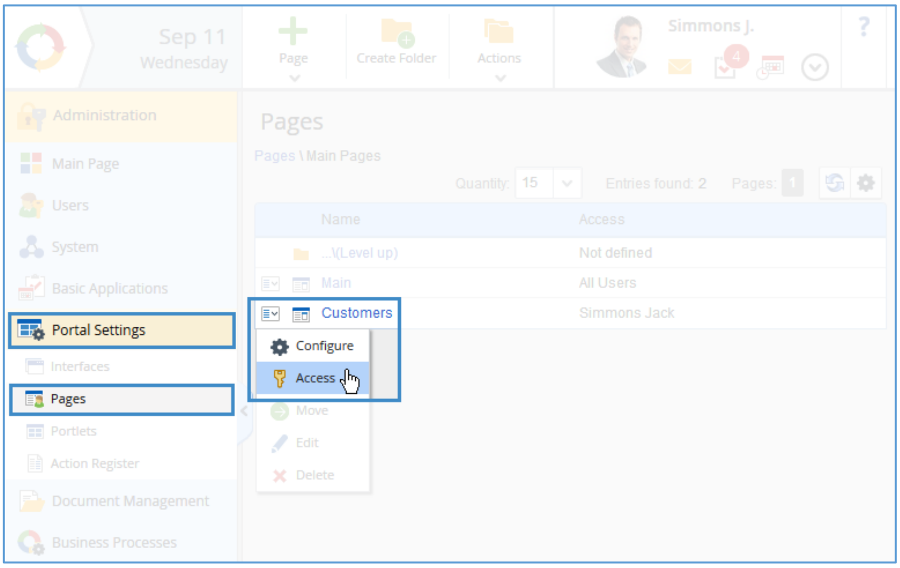


Fig. 92. Configuring main page access settings

Note that you can also set up access permissions to a page while configuring it. To do so, click the **Access** button in the top toolbar on the page (Fig. 84). In the **Access Settings** window, **Add** a new element in the **Extra Permissions** section (Fig. 93).

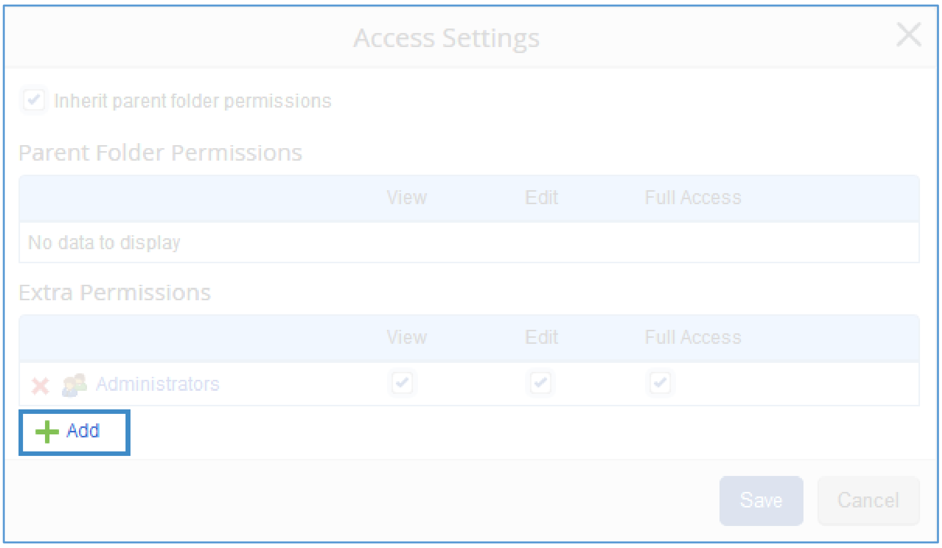


Fig. 93. Add Extra Permissions button

Select the 'Commercial Division' in the group list (Fig. 94).

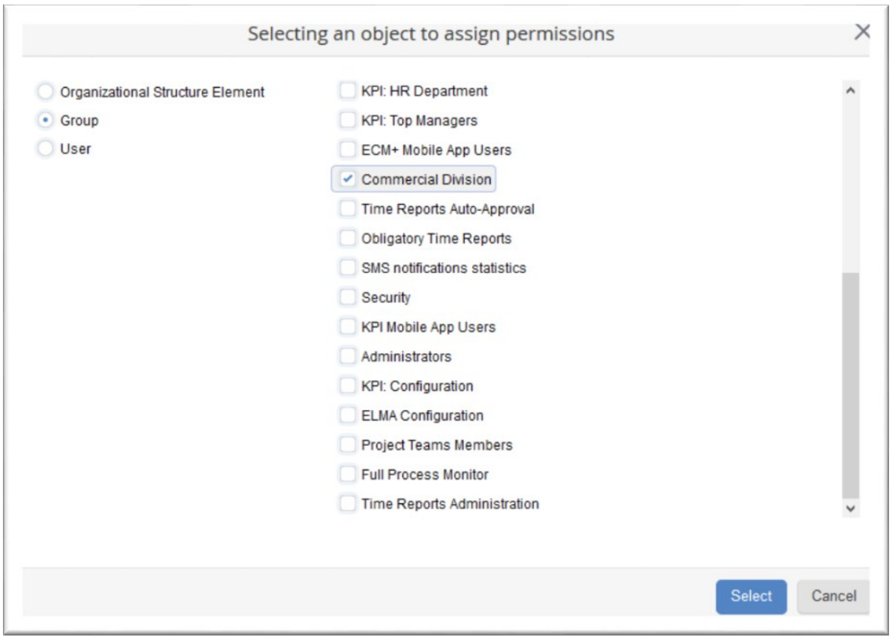


Fig. 94. Selecting a user group to assign permissions

The **View** access permissions are sufficient to use the main page. Check the corresponding box (Fig. 95). If a user needs permissions to change the personal page settings, check the **Edit** box.

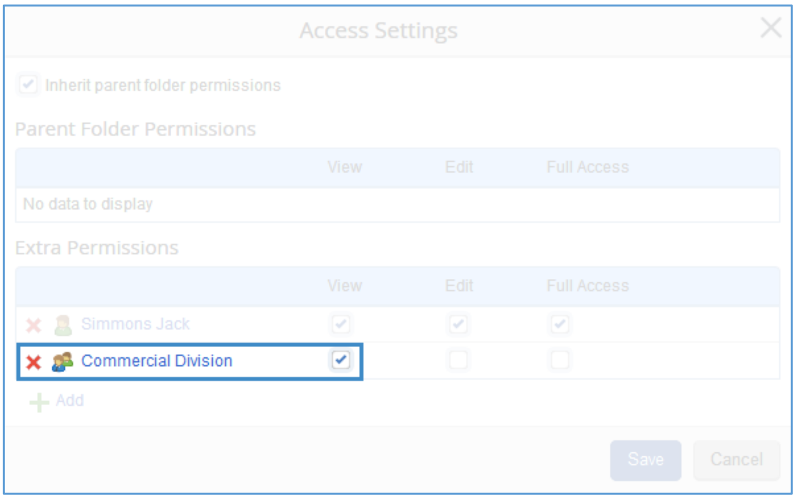


Fig. 95. Giving Extra Permissions to a user group

Click **Save** to add the permissions and finish configuring the **Main page.**

3.5.4. Configuring the Set of Main Pages

Let's add the newly created main page to the set of pages. Go to **Administration – Portal Settings – Interfaces – Default Interface** (Fig. 96).

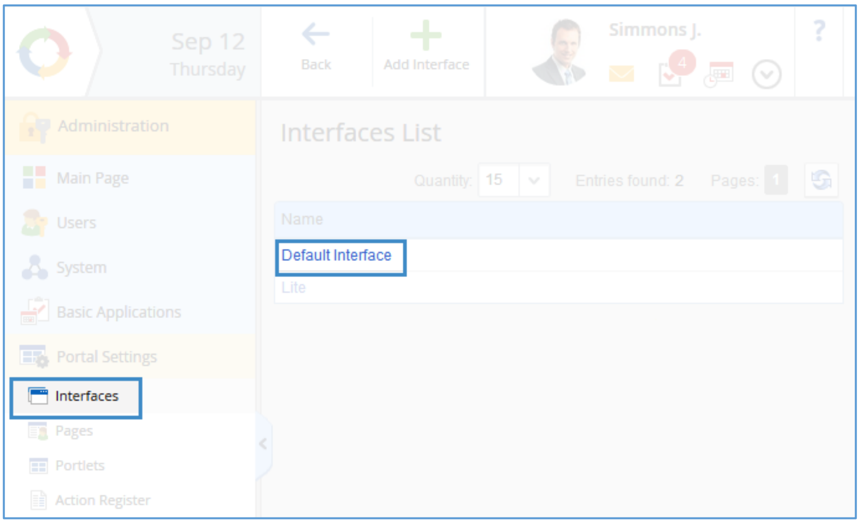


Fig. 96. Configuring Default Interface

Click the icon next to the **Set of Main Pages** to start editing it (Fig. 97).

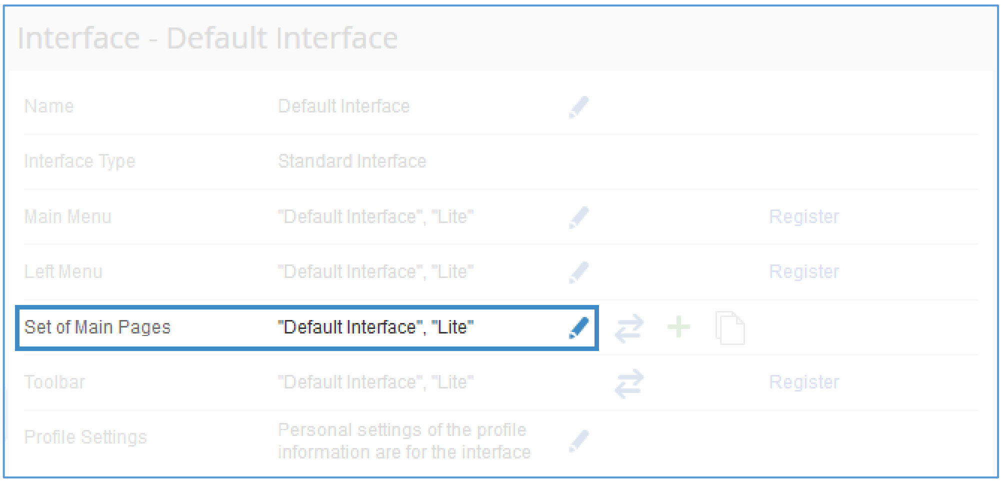


Fig. 97. Editing the set of main pages

Then click **Continue editing** to confirm that you want to apply changes to several interfaces at once (Default and Lite interfaces) (Fig. 98).

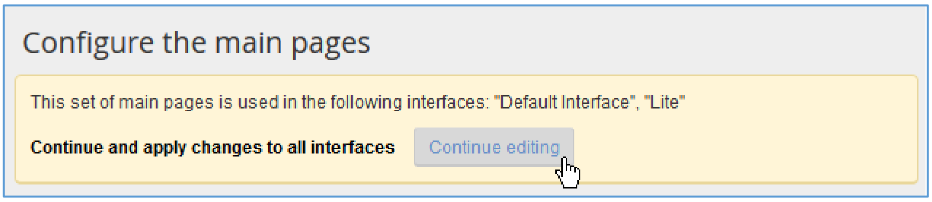


Fig. 98. Confirm that you want to change the set of main pages

In the window that opens, drag and drop the 'Customers' page to the **Selected Pages** column (Fig. 99).

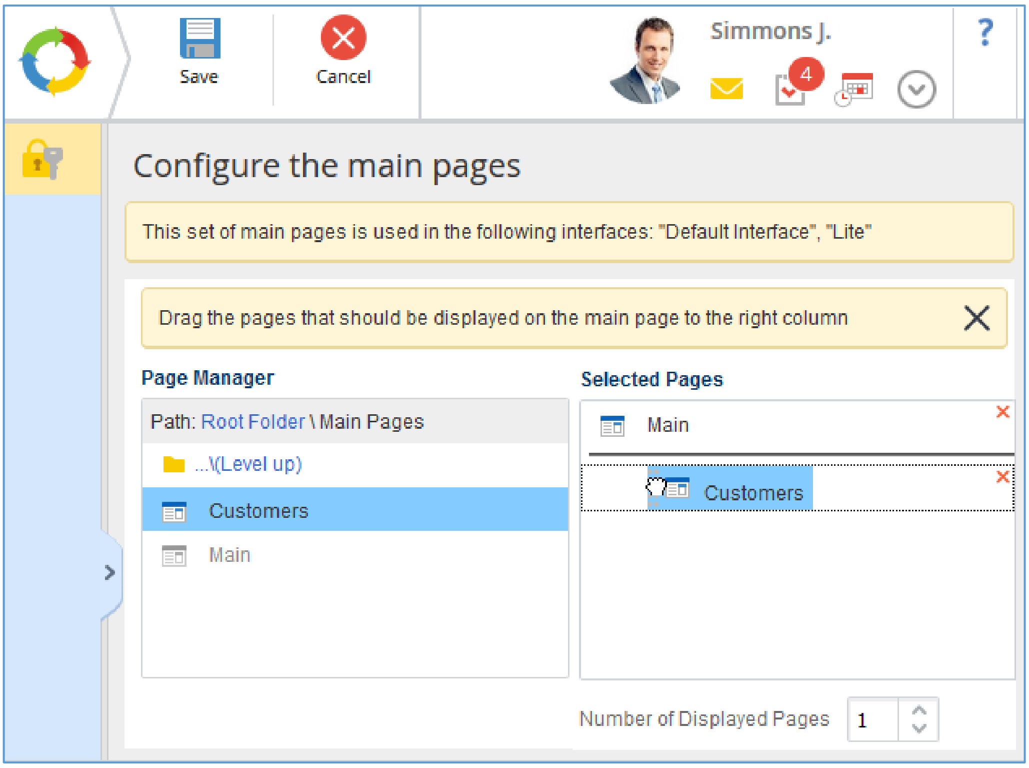


Fig. 99. Adding the main page to the set

With this setting, the 'Customers' page will be shown in the collapsed list of main pages. To make it visible immediately after logging in, increase the number of pages displayed. To do so, change the value to 2 in the lower right corner (Fig. 100).

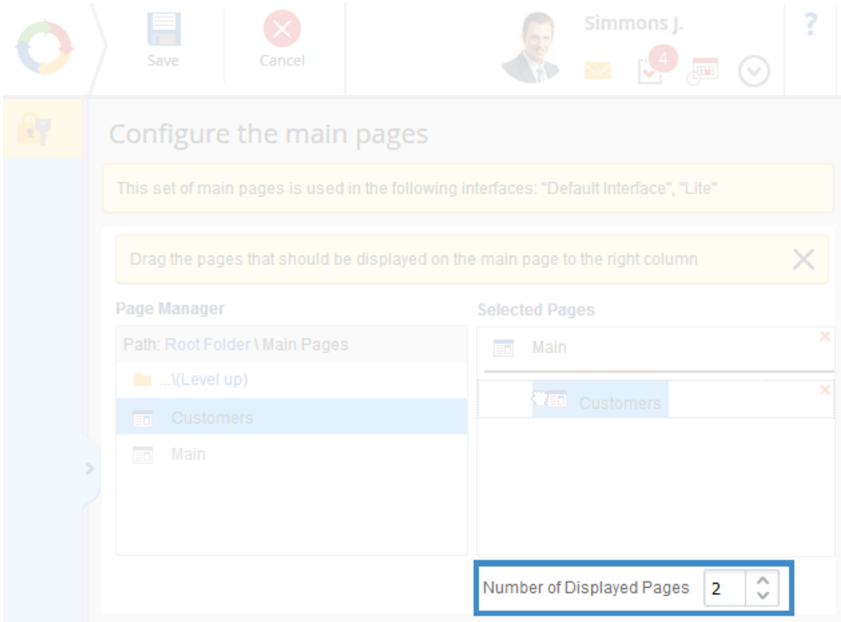


Fig. 100. Changing the number of displayed pages

You can also change the number of displayed pages by dragging and dropping the 'Customers' main page above the dividing line (Fig. 101).

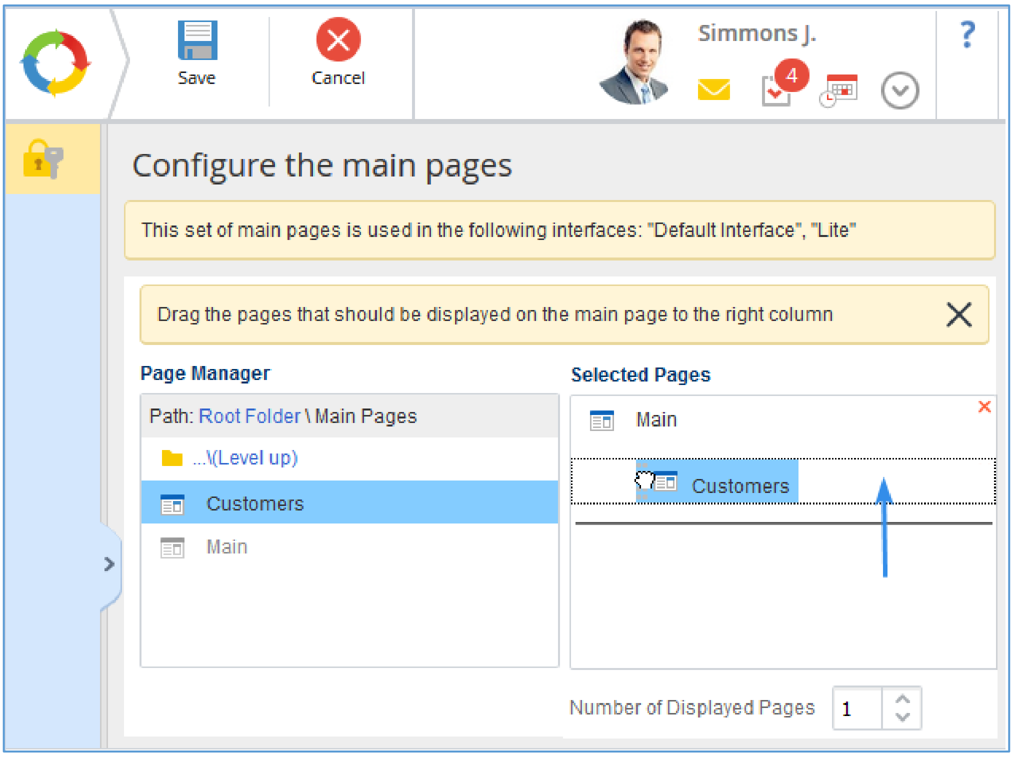


Fig. 101. Another way to change the number of displayed pages

Click **Save** in the top toolbar to save the **Set of Main Pages** (Fig. 102).

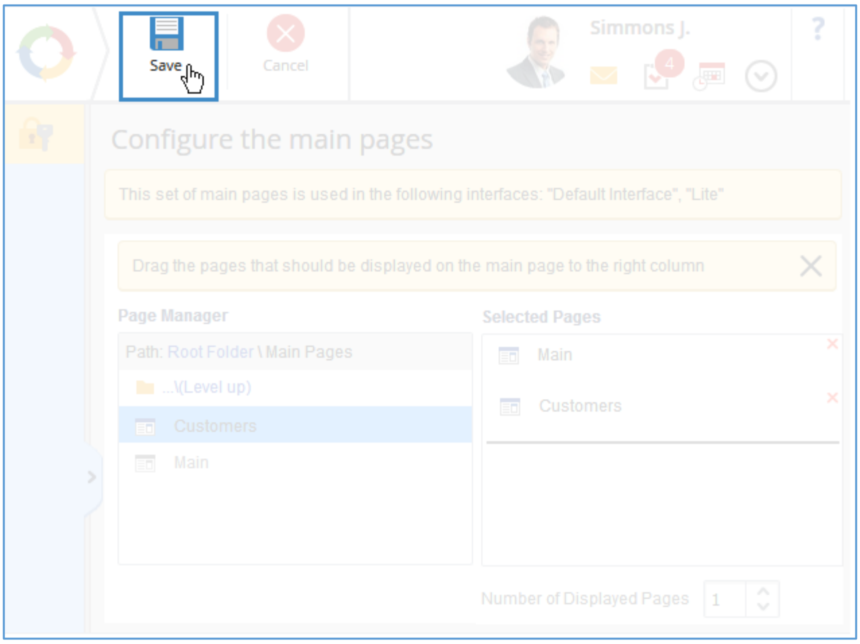


Fig. 102. Saving the set of main pages

We have finished configuring the interfaces. Now the **Customers** portlet page looks as follows (Fig. 103):

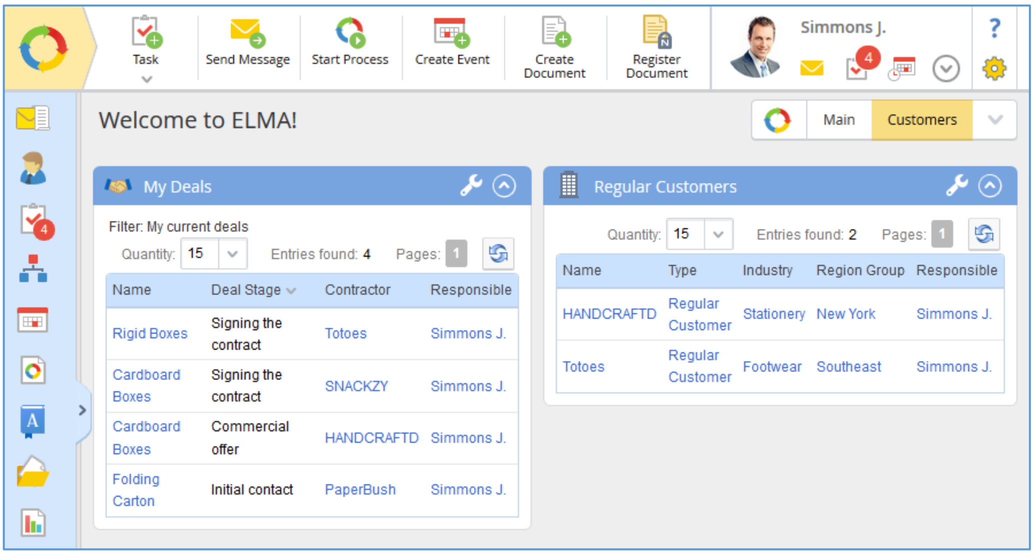


Fig. 103. Configured portlet page 'Customers'

Users now can work in a conveniently set up interface, manage contractors and deals, specify the name and the number of products, change deal stages and track their life cycle.

Chapter 4. Quick Sales

ELMA CRM+ application works perfectly in sales with a short cycle. Short-cycle sales implies selling and shipping simple products or providing simple services. For such sales, business processes might be very beneficial.

The main goals to attain in quick sales are:

- perform standard actions accurately;
- meet deadlines;
- instantly access required information in points of contact.

You can achieve these goals with the help of two platforms: **ELMA CRM+** (allows managing customer relations) and **ELMA BPM** (helps to automate sales processes).

Using processes will allow you to standardize all sales stages from accepting and order from a customer to manufacturing goods. It will also facilitate quality control monitoring.

In this chapter, you will find out how to:

- customize a **customer page** to quickly find information;
- transform a **deal page** into an **Order** page that will store information about customers purchases;
- create a **sales business process (Execute order)** to manage all stages purchase process.

Let's take as an example a small company that installs windows. The organization works with individuals, employs sales reps, designers and installers and has its own production.

Here is the company's workflow (Fig. 104):

1. A sales rep receives a client's request.
2. An installer takes measurements.
3. With these measurements at hand, the designer creates a project and calculates the window production and installation cost.
4. The sales rep quotes the client the price and they sign the contract.
5. The head of production controls the production of the windows.
6. The installers install the windows and fill out the completion form.

Fig. 104. Fulfilling an order workflow

Below, you can read about some principles behind configuring the object model, setting up user interfaces, and generating documents using a template. After that we fill in a few necessary objects, and create a sales business process to work with the above-described case.

4.1. Configuring Object Model

The first step is to configure the **Contractors** and **Deals** pages and the respective objects. Since the company described above works with individuals, we will use the **Contractor** object of the **Individual** type as the main object of **ELMA CRM+**.

4.1.1. Configuring Contractors and Deals Forms

When you work with customers, you don't always use all the fields on a contractor page, so the first step is to remove unnecessary items. Standard object fields cannot be deleted, this is why you should make the necessary fields easily accessible for users, and place the unnecessary fields on another tab. Read Section 3.2.2 and see Fig. 16 to find out how to configure view forms.

Make the following changes to the view form of the **Individual** object:

1. Remove all unnecessary fields from the tab **About the Individual.** Leave only these fields: **Name, Responsible, Description, Categories, Email** and **Phone Number**.
2. Change the **Name** field so that **on the form** it is displayed as 'Full Name'
3. Drag the fields from the right column to the left column, and the **Description** field – to the right column.
4. Create two new panels on the **About the Individual** tab: **Address** and **Orders.**
5. Go to the **Attributes** tab and drag the **Postal Address** field to the newly created **Address** panel; open the **Deals** tab and take the **List of Contractor Deals** to the **Orders** panel.
6. On the **Attributes** tab, uncheck the **Required field** box in all the required fields (have red asterisk next to them).
7. To remove all the unnecessary fields from the **About the Individual** tab, create a new tab called **Other Attributes** and move there the **Container for Default Properties** (the blue panel that reads 'Here you will see the properties…') **–** it will gather all the removed fields.

The **About the Individual** tab will look as follows:

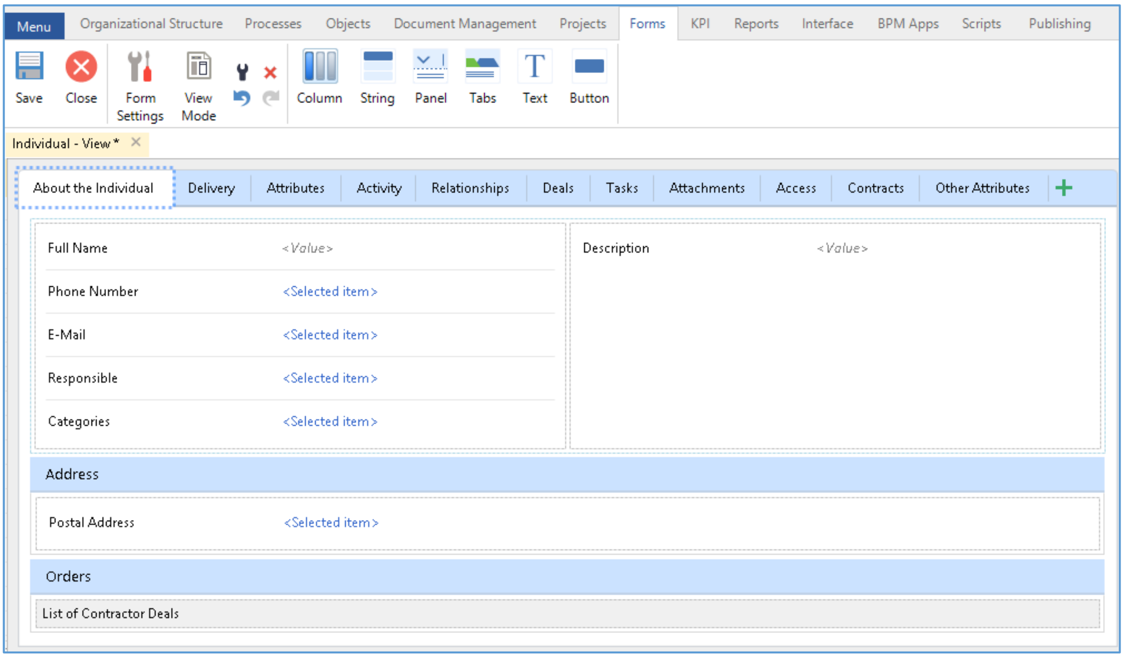


Fig. 105. Edited view form of the About the Individual tab

We have finished configuring the **Individual** page.

Information about an order will be stored in the standard **Deal** object. Deals will be created at the very beginning of the sales process. In our example, we will store several additional properties on the **Deal** page. Read Section 3.3.1 to find out how to create and configure properties. Now let's create the following properties on the **Deal** object view form:

- **Project** – **Attachment** type;
- **Contract** – **Attachment** type;
- **Window profile** – **Drop-Down List** type (list items are SUPREME S177 PHOS, SMARTIA S233 PHOS, LAMBDA SA1);
- **Type of windows – Drop-Down List** type (list items are Window, French Window, Balcony Window). Uncheck the **Select from list only** box because there can be orders for non-standard windows.

Now let's configure the view form of the **Deals** object. Do the following to optimize it:

1. Delete all the tabs except for **About the Deal** and **Tasks.**
2. Delete unnecessary fields from the **About the Deal** tab and leave only these ones: **Contractor, Name, Sales Volume, Responsible, Deal Stage, Status, Start Date, Closing Date,** and **About the Deal.**
3. Put all the fields in the left column except for **About the Deal** – drag it to the right column. Add the previously created properties to the right column too: **Project, Contract, Window profile**, and **Type of windows.**

4. Add a new tab **Other Attributes** and drag the **Container for Default Properties** onto it.

Now the view form of the **Deal** object looks as follows (Fig. 106):

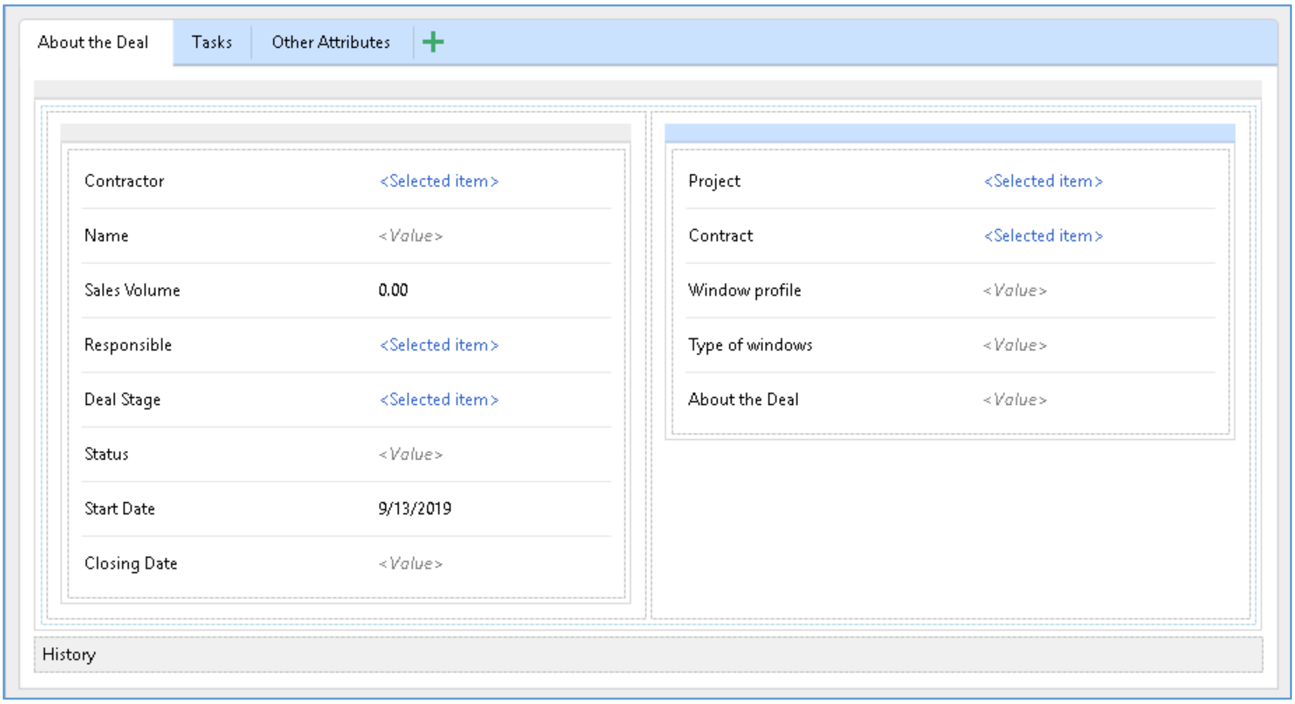


Fig. 106. Edited view form of the Deal object

Now it's time to configure the edit form of the **Deal** object. Make the following changes to it:

1. Add a new panel called **Other Attributes.**
2. Go to the panel settings, check the box **The panel can be collapsed,** and select the **Minimized by default** parameter.
3. On the **Other Attributes** panel, put the **Container for Default Properties**.
4. Add and delete panels and properties as shown in Fig. 107.

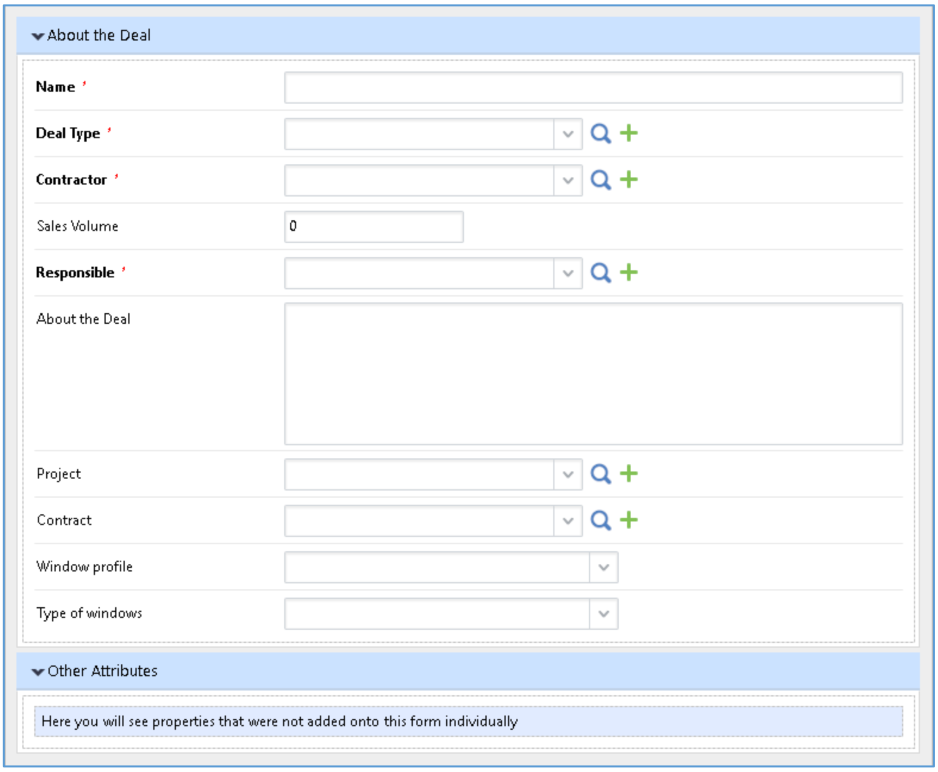


Fig. 107. Configured edit form of the deal object

We have finished configuring the object forms. Now publish the **Individual** and **Deal** objects and restart the server. To find out how to do that, see Section 3.2.2.

4.1.2. Starting a Process from a Contractor Page

Let's assume that your system is integrated with VoIP (IP telephony) and when there is an incoming call, the contractor's page opens. On this page, you can start a business process with just a few clicks, you will not have to fill in any data about the customer. In ELMA terms, it means that you can start the process 'Execute order' right from the **Individual** object page. If you need to start business processes not only from **Individual** pages, but also **Company** pages, choose **Contractor** as an object.

Now let's open the **Processes** tab in the ELMA Designer and select the process that we will start from an object page. Then, on the process page that opens, go to the **Context** tab. In the list, find the **Customer** property of the **Individual (Object)** type and select the boxes **Search** and **Input** (Fig. 108). The **Input** box means that the property can be transferred to a business process when it is started, while the **Search** box implies that you can filter process instances by the specified property in the **Process Monitor.**

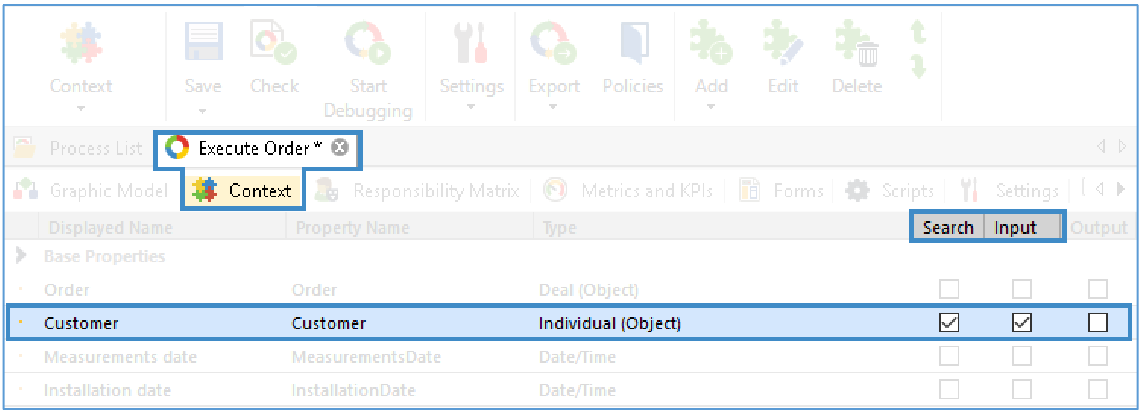


Fig. 108. Search and Input boxes for the property of the Individual type

Publish the process and go to the **Objects** tab to edit the **Individual** object. In the window that opens, go to the **Processes** tab and **Add** the process 'Execute order' so that you can start it from the object page (Fig. 109). In this list, you will see only those business processes that have a property of the **Individual** type in their context and it is marked as **Input**.

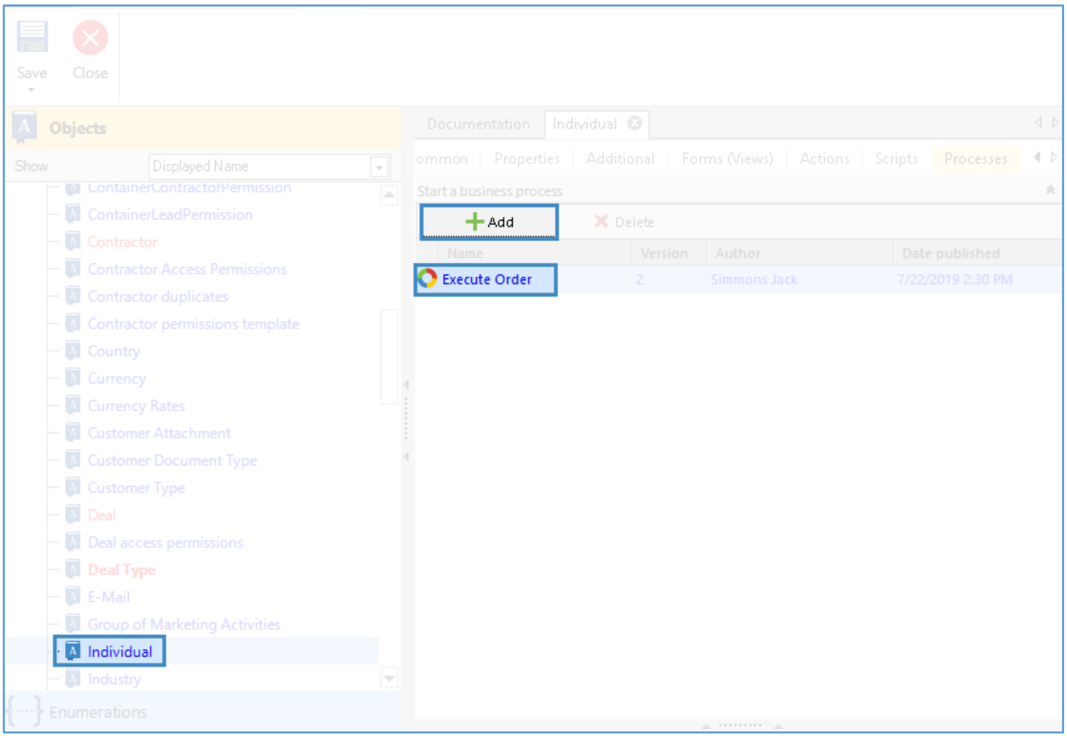


Fig. 109. Adding a processes to the Start a business process list

When you have added the process, publish the **Individual** object and restart the server to apply changes (see Fig. 21).

Now that the settings are configured and applied, you can start the process right from the contractor page (from an **Individual** page in our case) (Fig. 110).

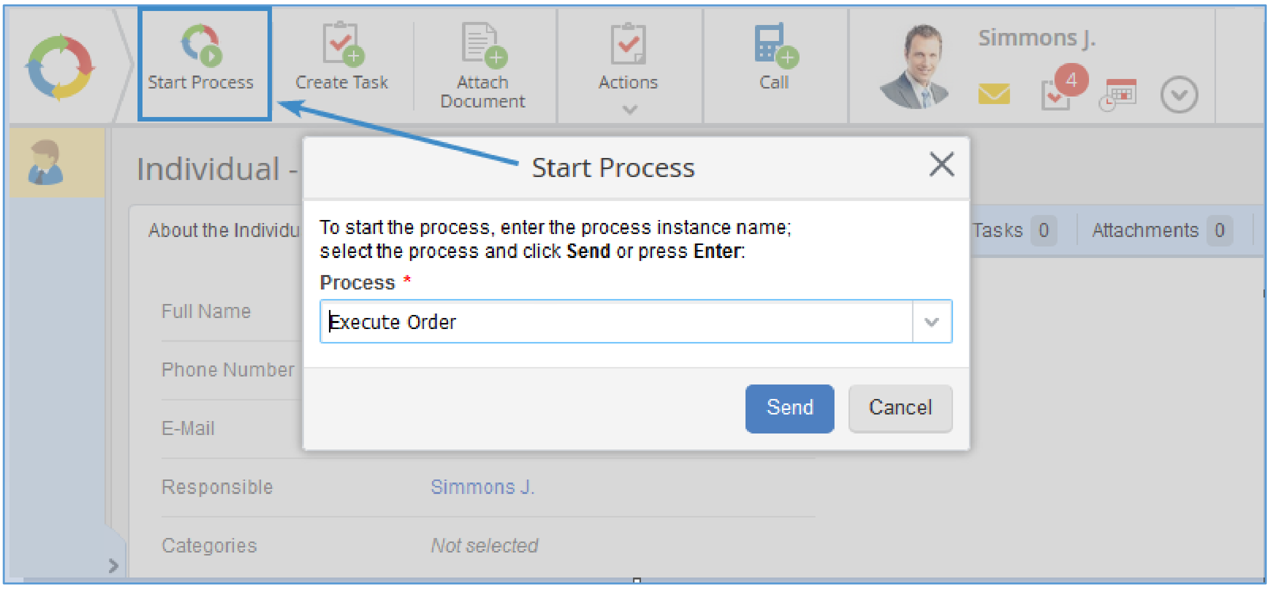


Fig. 110. Starting the process from an individual page

4.1.3. Adding items to CRM Objects

First, let's add items to the main CRM objects. You can find them in ***Administration – CRM Settings.*** Read Section 3.2.3 to learn how to configure them.

Let's create a sales funnel 'Windows order' that consists of six stages (Fig. 111):

1. Order received
2. Being designed
3. In production
4. Installation planned
5. Installed
6. Documents received

Click the button in the toolbar to **Save** the funnel. These stages will be used while modeling the 'Process Order' business process. They reflect the steps that an order goes through in the company.

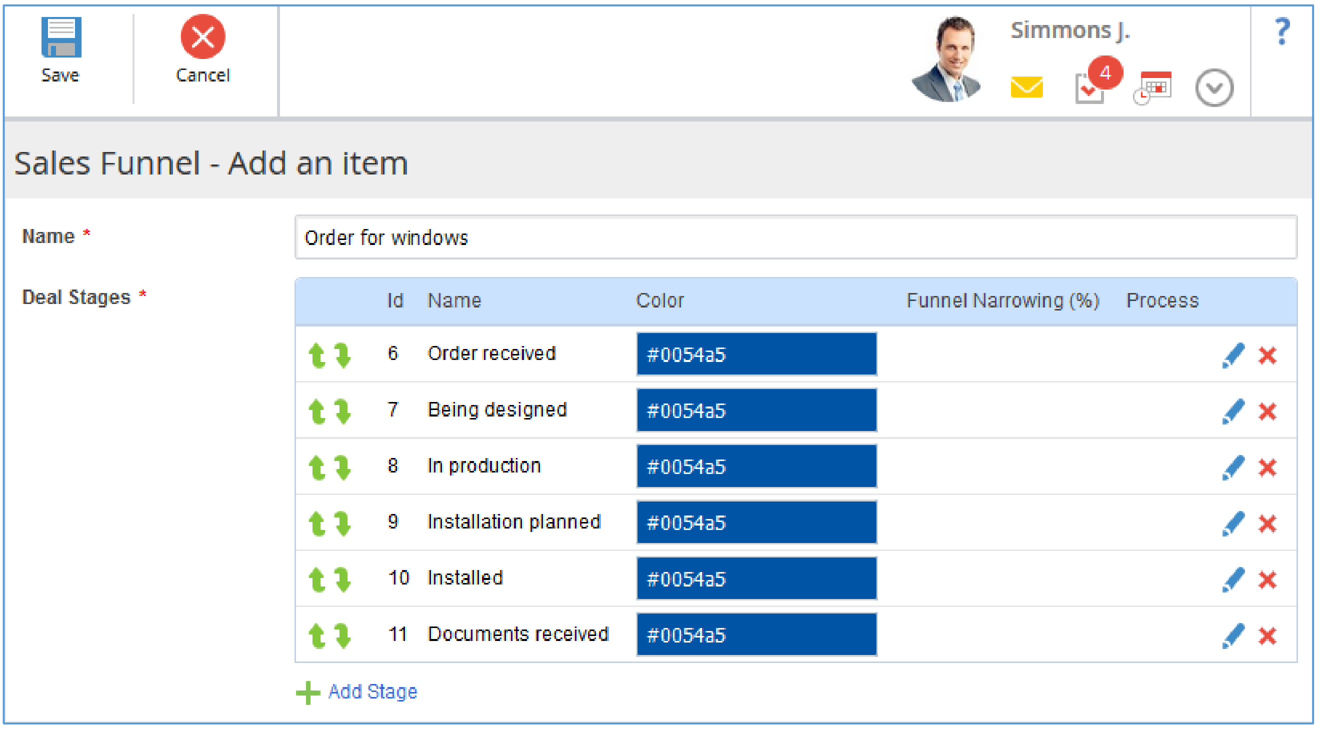


Fig. 111. Configuring sales funnel

Create an item in the **Deal Type** object**,** enter in the name and select the newly created **Sales Funnel** in it. **Save** the deal type item (Fig. 112).

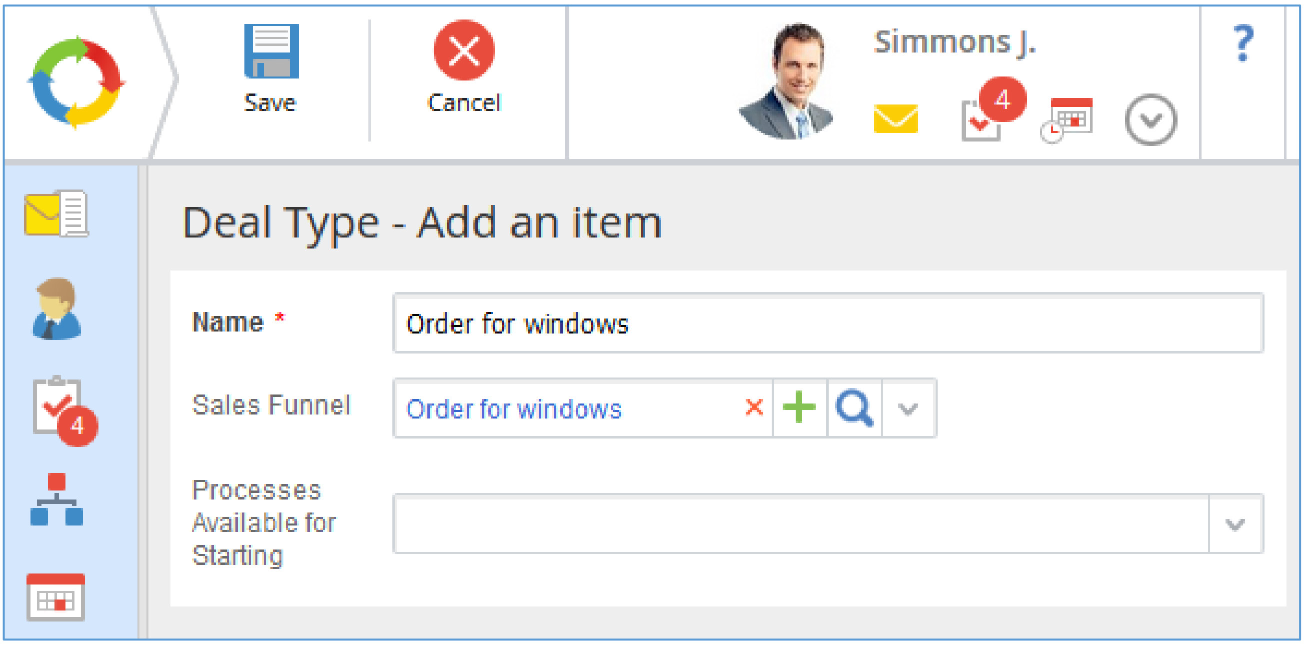


Fig. 112. Creating a deal type item

Now open the **Customer Document Type** object. Add two new items to it: ID card and driver's license (Fig. 113).

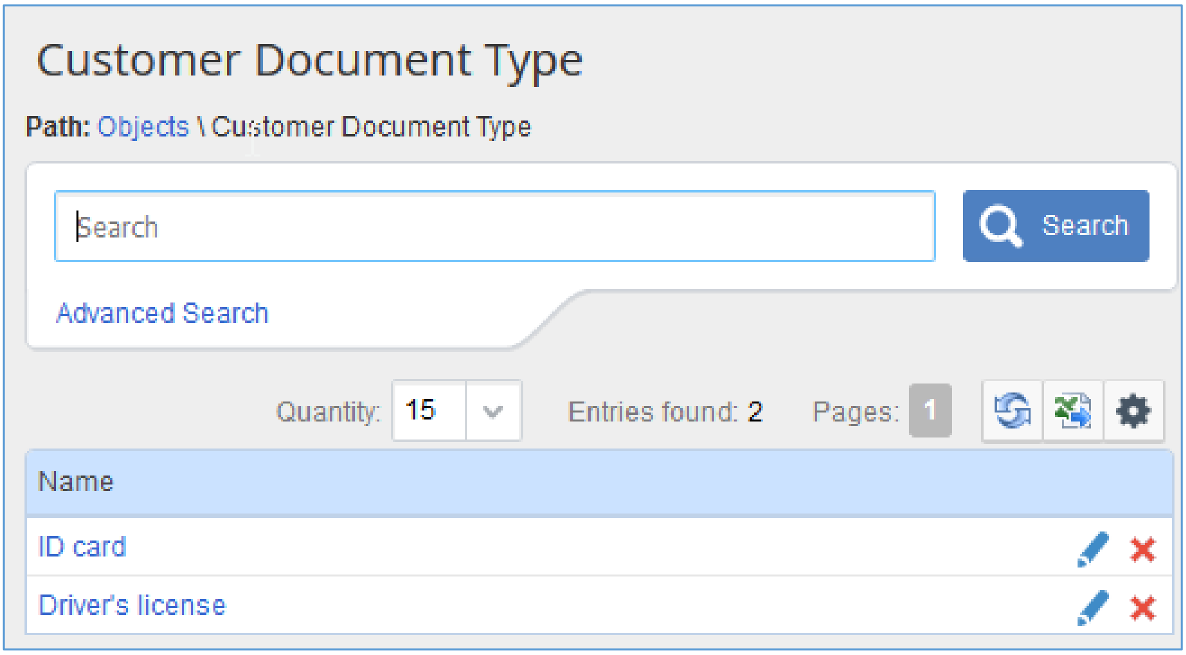


Fig. 113. Customer document type object

We have finished configuring standard objects.

4.1.4. Working with the FIAS Address Base

You can integrate ELMA with FIAS Address Base (Federal Information Address System that functions on the Commonwealth of Independent States territory). **FIAS** is a unified, open, regularly updated address classifier that contains information about address objects and real estate objects that are located at them. Companies use FIAS to quickly and correctly enter their contractors' addresses.

You can download the address database (Fig. 114) from the official website of Federal Tax Service of Russia on the Federal Information Address System page. The DB file comes in different formats – download the **.xml** file.

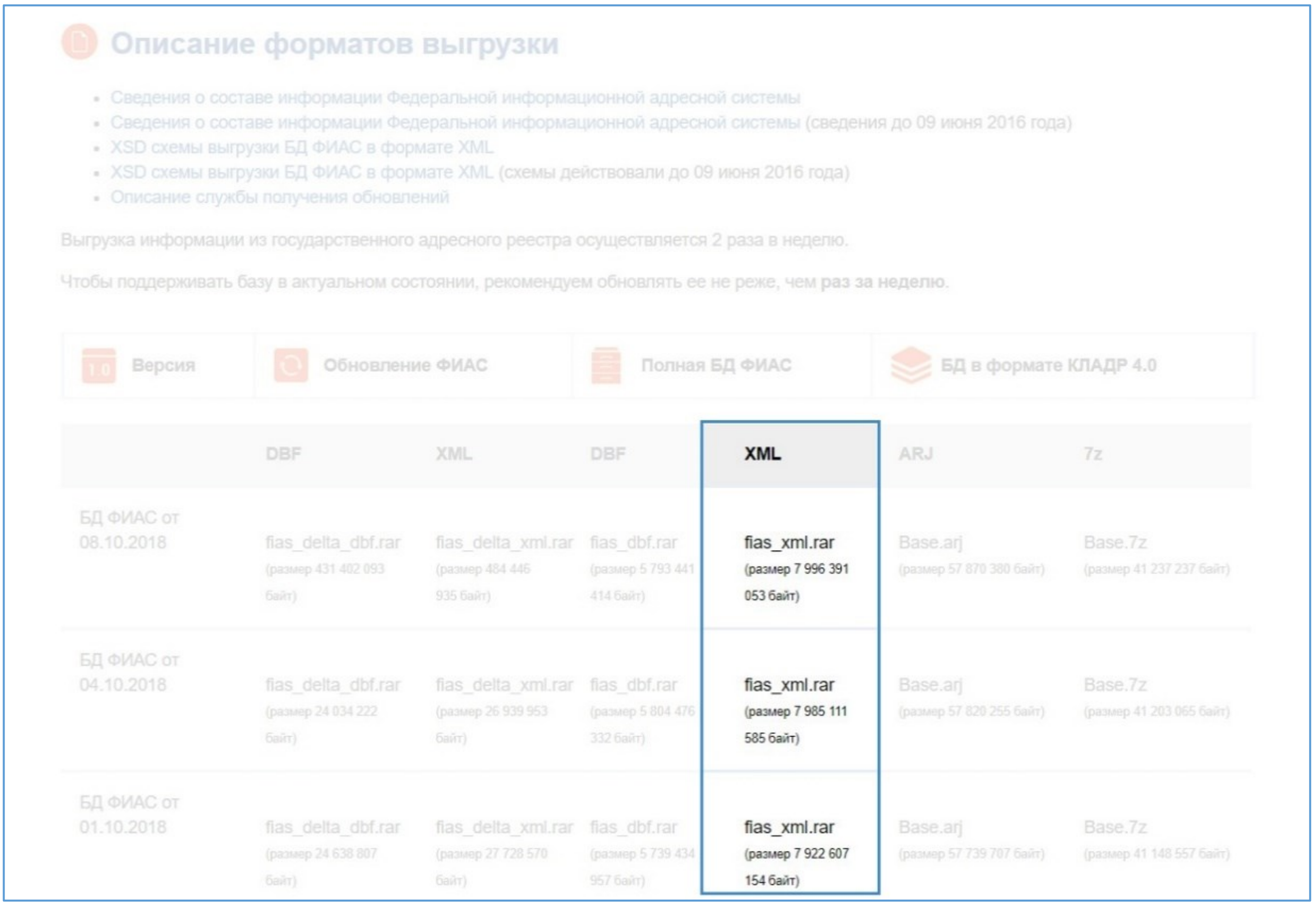


Fig. 114. Downloading FIAS archives from the Federal Tax Service of Russia website

As a rule, the FIAS database is rather heavy (around 6-15 GB), so before downloading it make sure you have enough space on your server (Fig. 115).

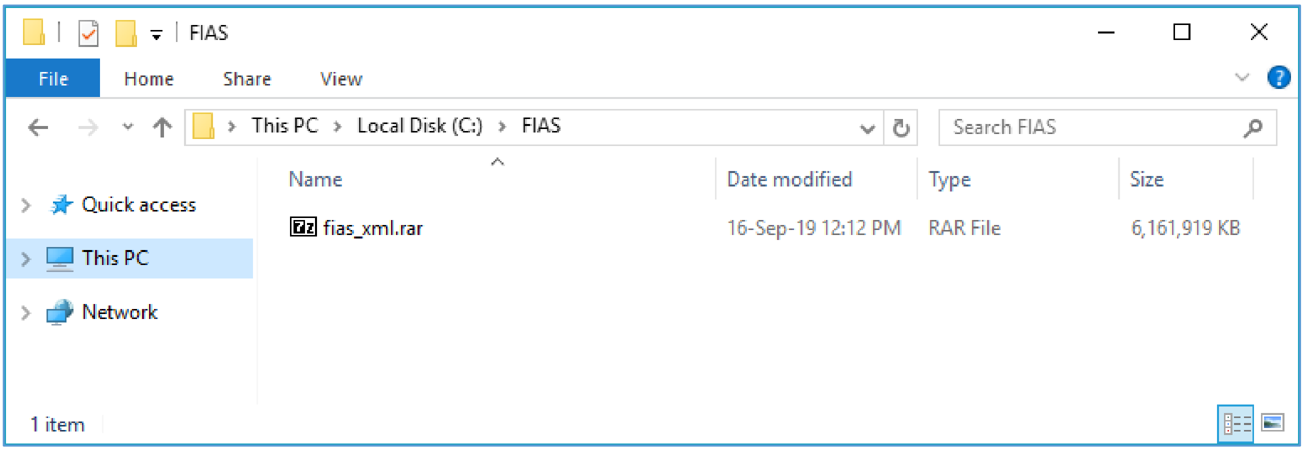


Fig. 115. Address base archive file

Unzip the downloaded archive (Fig. 116).

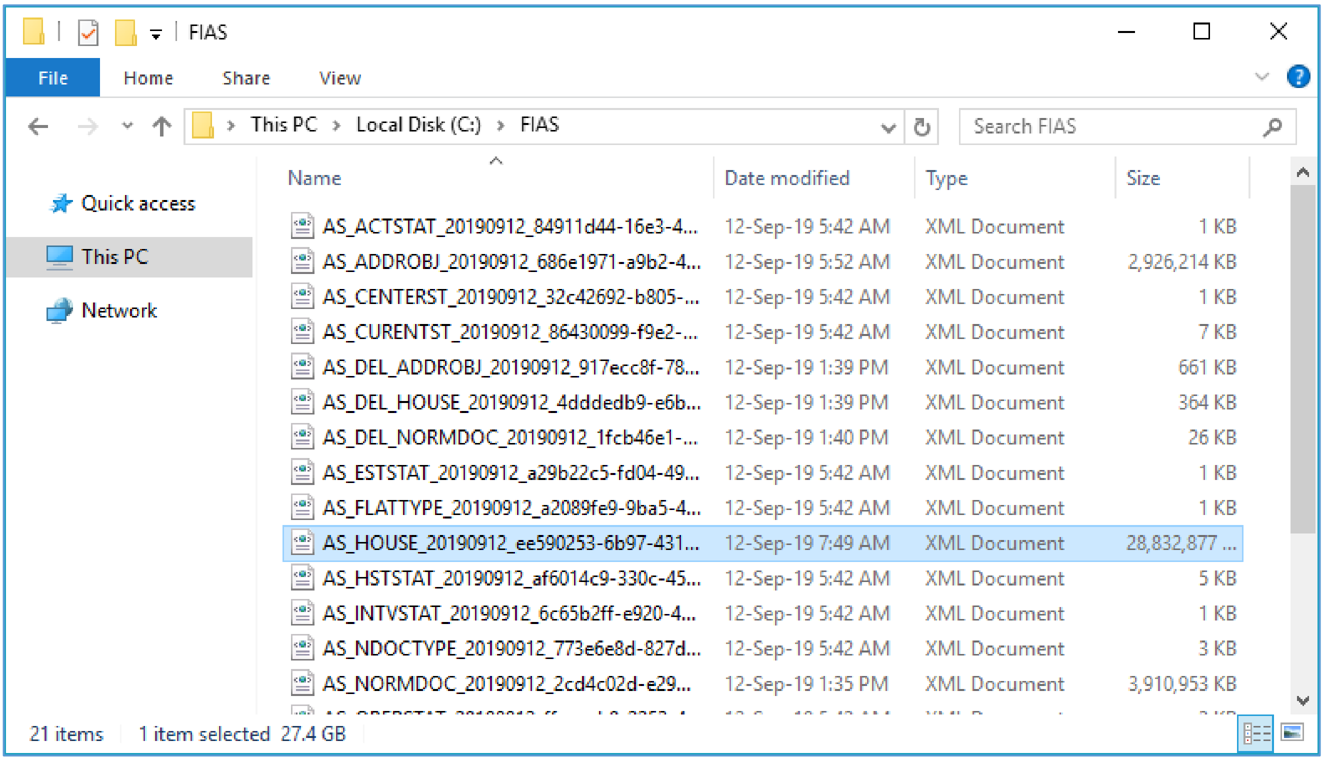


Fig. 116. Unzipped FIAS database

Move the files to the configuration folder (Fig. 117). By default, the path to the ELMA configuration folder is **../<ELMA system files folder>/UserConfig.** Create a new folder called **FIAS** and put the unzipped files there. This is a system folder name – do not change it.

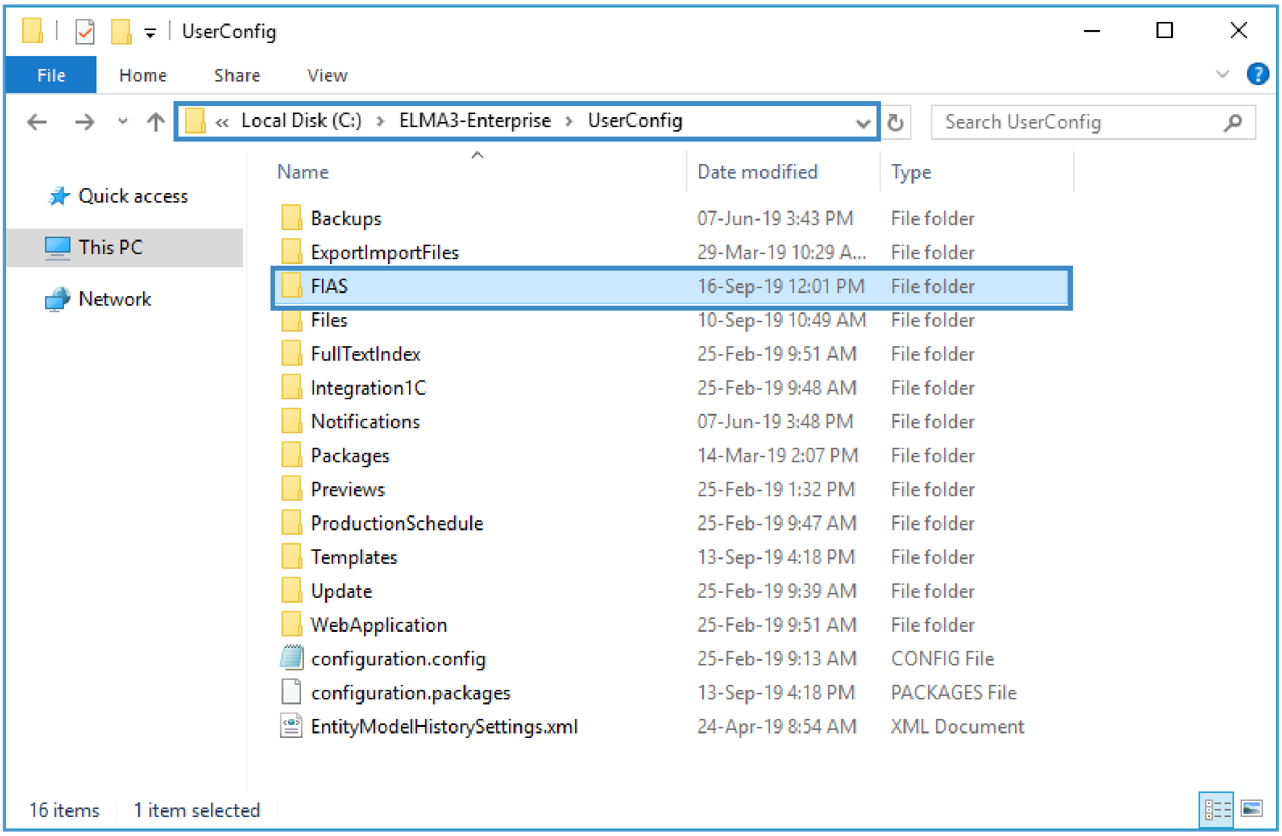


Fig. 117. Creating a folder for the address database

Note that the FIAS address base will work correctly only if the FIAS Address Provider component (Russia) is installed and activated in the system. This component is included in the basic delivery of the ELMA system and is installed by default, but in some cases (for example, when activating additional licenses) this component may not be pre-installed. To check the status of this component, go to the ***Administration – System – Components*** section, this provider and its status will be displayed in the list of system components. If this component is not installed, then manual installation will be required. For details on working with system components, see ELMA Help.

To configure the contractor address base, go to **Administration – CRM Settings – Address Settings for Contractors** and click on the link **Russian Federation – FIAS database**.

On the page that opens, you will see a notification that you need to check if there is the FIAS database in the UserConfig folder. You can also see the **Module General Settings** panel (Fig. 119).

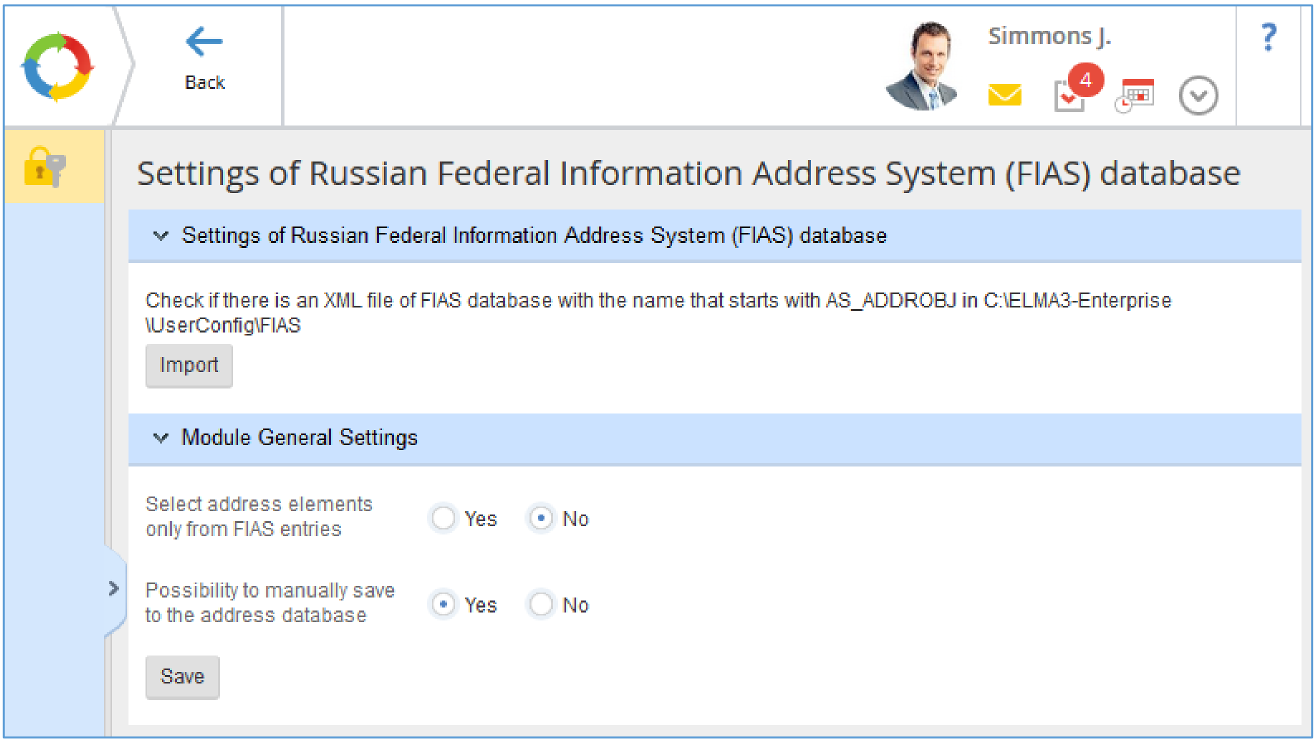


Fig. 118. Settings of FIAS database

In the module settings, you can decide whether or not to **Select address elements only from FIAS entries** and **Save entries to the FIAS database** or only to the Contractor address block.

Click **Import** to start the import procedure of the FIAS database from the system configuration folder. If the FIAS database is in the required folder, the import will start. Otherwise, the system will display a notification that there are no database files in the folder. The import will take around 30 minutes. Wait until it's complete. Once the files have been successfully imported, the corresponding notification will be displayed on the **Settings of FIAS database** page.

To make it easier for you to work with the FIAS database, go to ***Administration – CRM Settings – Select a default country*** and choose the **Russian Federation** in the drop-down list.

Now that the address database is configured, you can fill in contractors' addresses in the following order: **Country -> Region -> District -> City -> Locality -> Street**, etc. The values in the drop-down lists of fields are displayed depending on the values selected in the previous fields (Fig. 119).

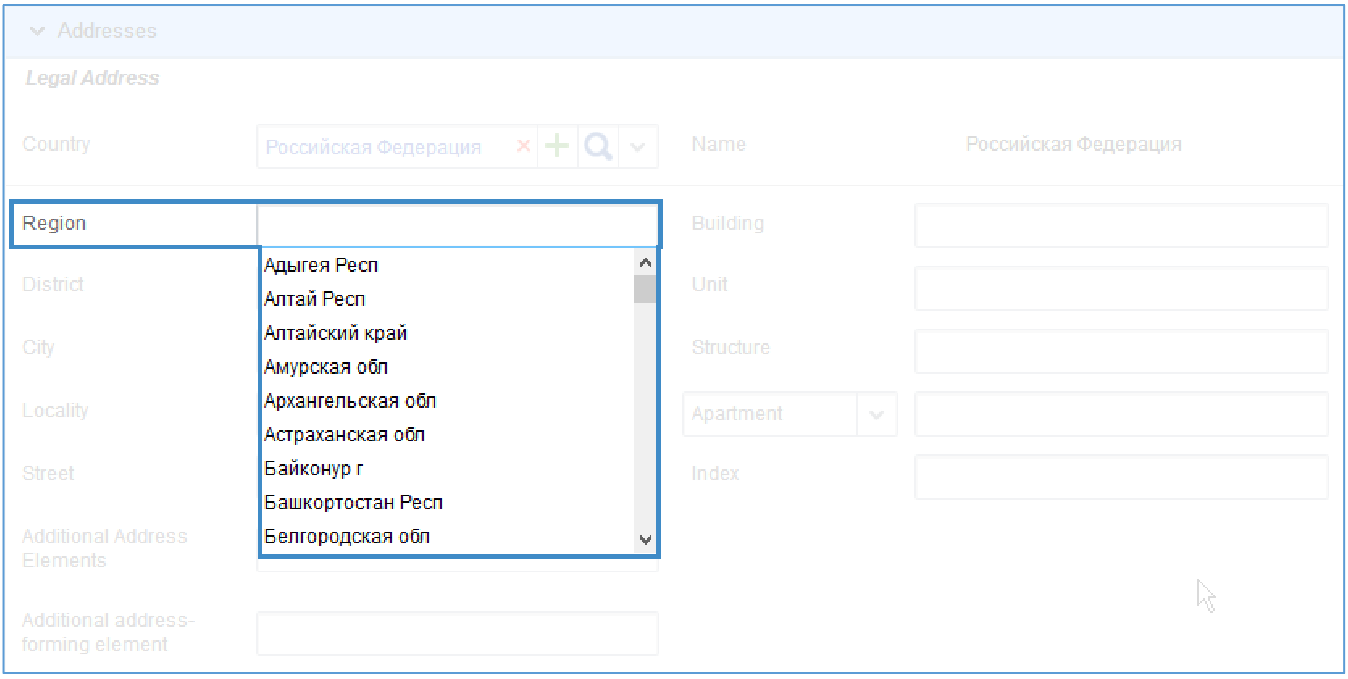


Fig. 119. Contractor's addresses filled in with FIAS

This is how a contractor's page will look like if the address section was filled out using FIAS (Fig. 120):

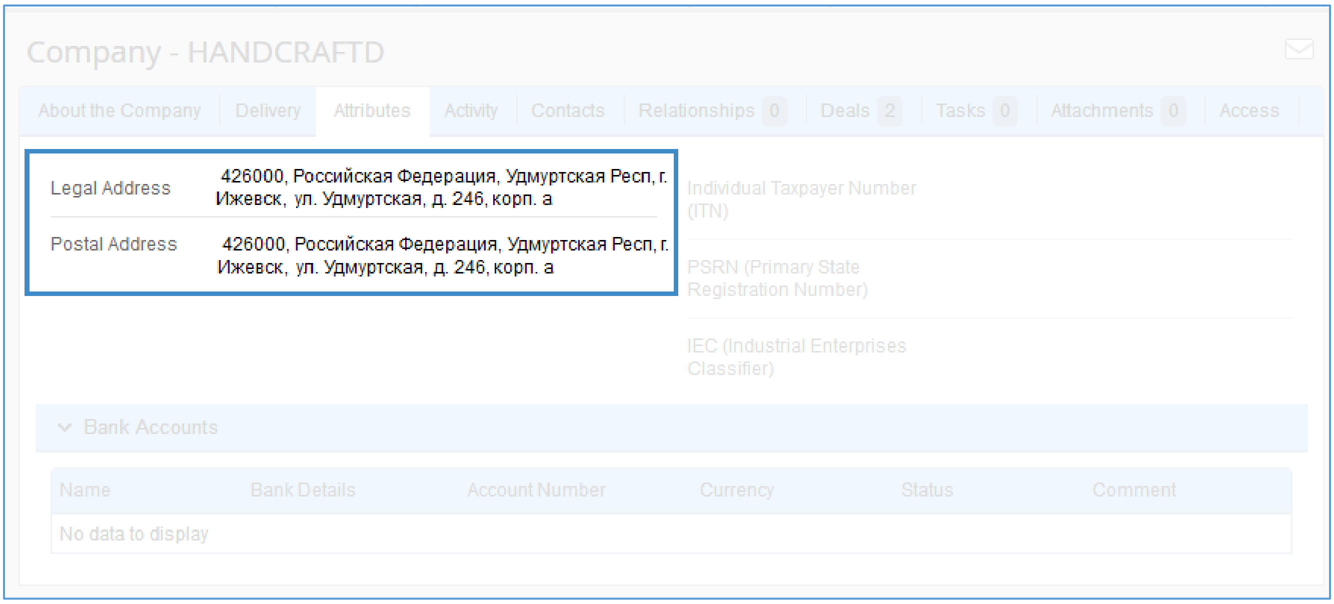


Fig. 120. Contactor page. Attributes tab

4.2. Sales Business Process

To start configuring the business process, create the **Organizational Structure** with the following job positions (Fig. 121):

- Sales reps;
- Designers;
- Head of Production;
- Installers;
- Secretary (document specialist).

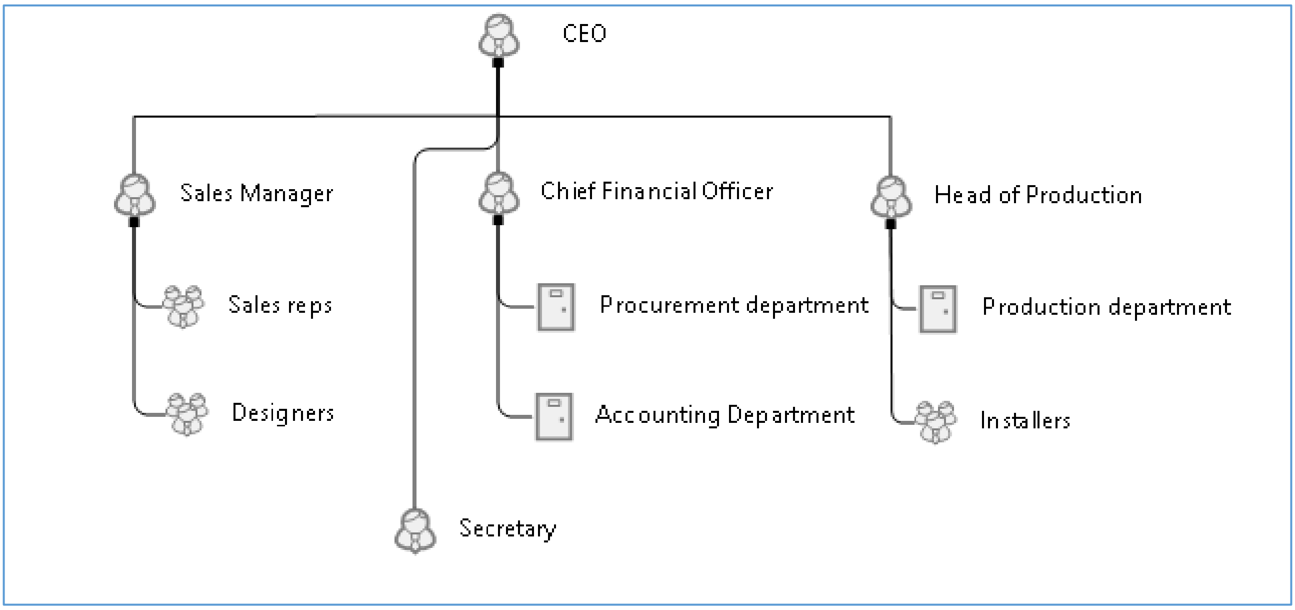


Fig. 121. Example of an organizational structure for the quick sales use case

For more details on creating and configuring the org chart, read the [User Manual on ELMA BPM Platform] and [ELMA Help].

Publish the **Organizational Structure** so that you can work with it in the ELMA Web Application (see Fig. 21).

4.2.1. Creating a Sales Business Process

Let's consider how to model the quick sales process step by step. First, we will configure the general logic of the process, then add the properties and special activities to manage CRM objects.

Once modeled, the process map will look as follows in ELMA Designer (Fig. 122):

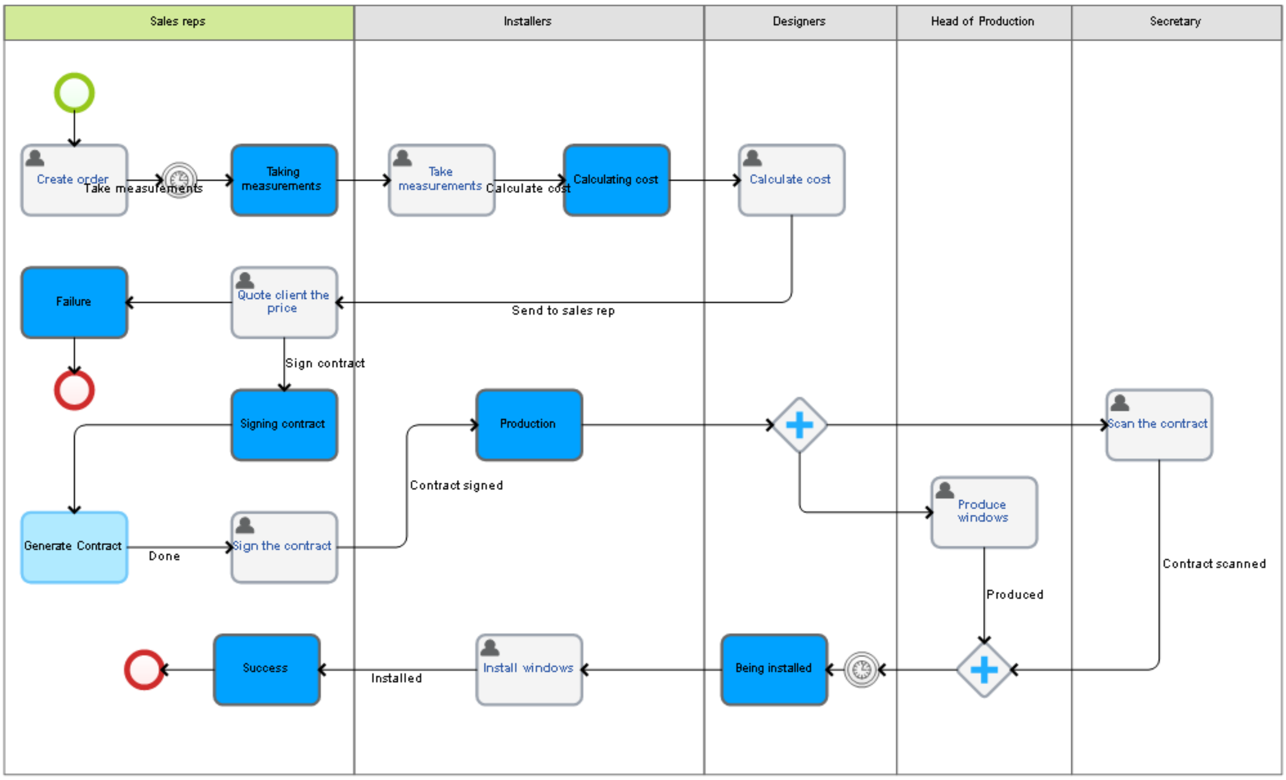


Fig. 122. Quick sales business process map

To create and configure the process, go to ELMA Designer > the **Processes** tab. Click **Add** in the top toolbar to open the Business Process Wizard (Fig. 123).

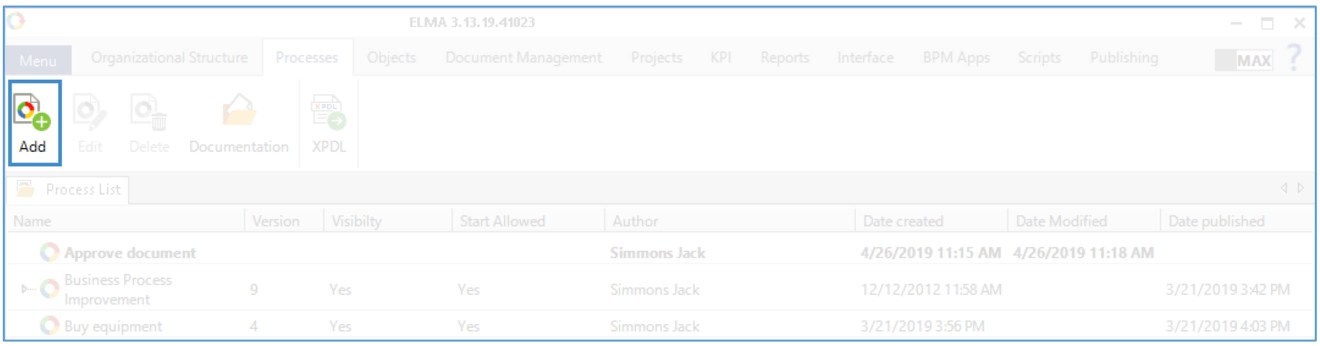


Fig. 123. Creating a new business process button

In the first step of the wizard, enter the name of the business process ‘Execute order’ (Fig. 124). In the **Process Group** field, you can create folders and add your processes to them. This allows grouping your processes into different categories. Leave the fields under the panels below blank.

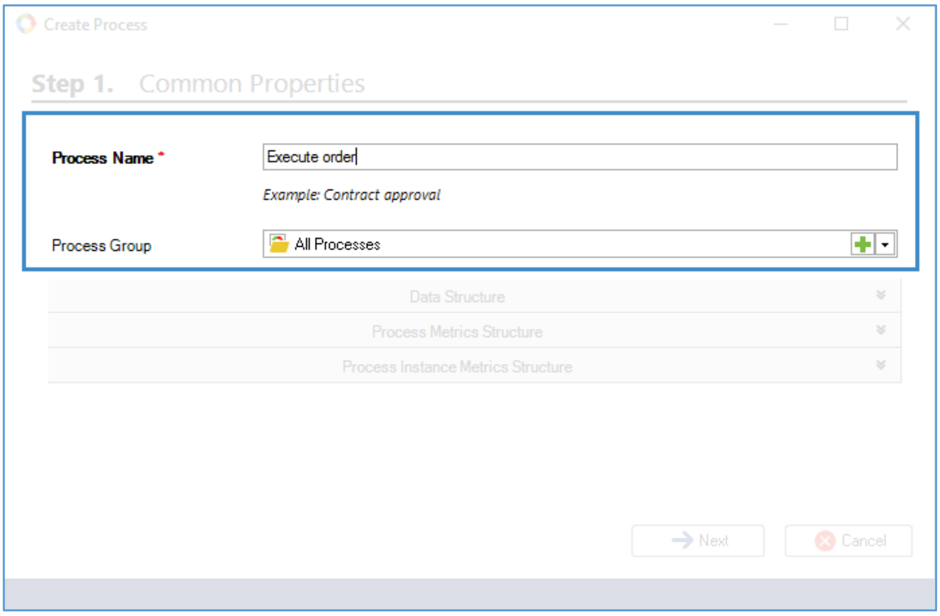


Fig. 124. Creating a business process in the wizard. Step 1

4.2.2. Configuring swimlanes

In the second step of the wizard, create the business process swimlanes using the org chart elements. To create a swimlane, select the desired position in the tree and click **Move** (Fig. 125).

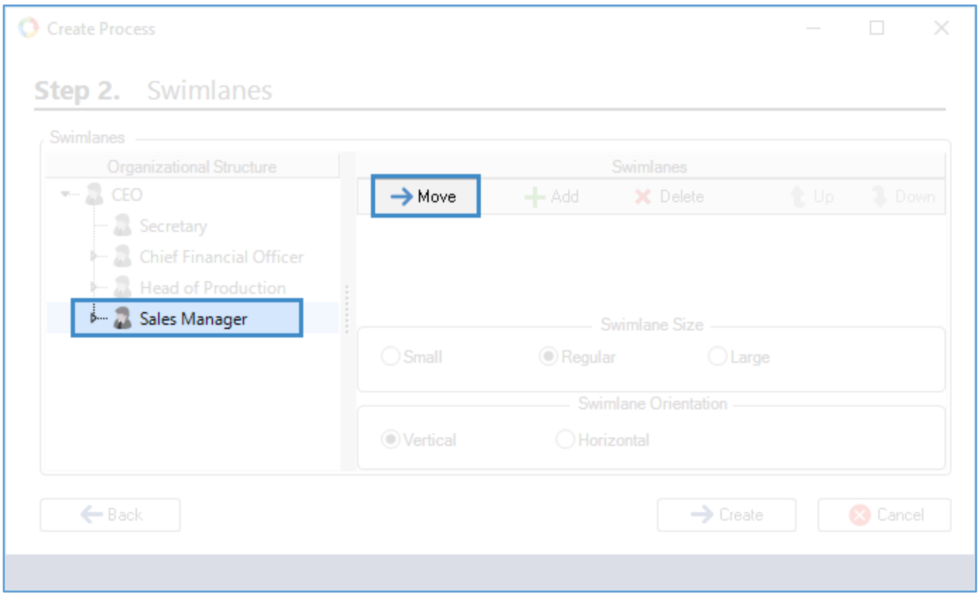


Fig. 125. Adding a swimlane

Add the following swimlanes:

- Sales reps;
- Designers;

- Head of Production;
- Installers;
- Secretary.

After that, click **Create** to close the wizard (Fig. 126).

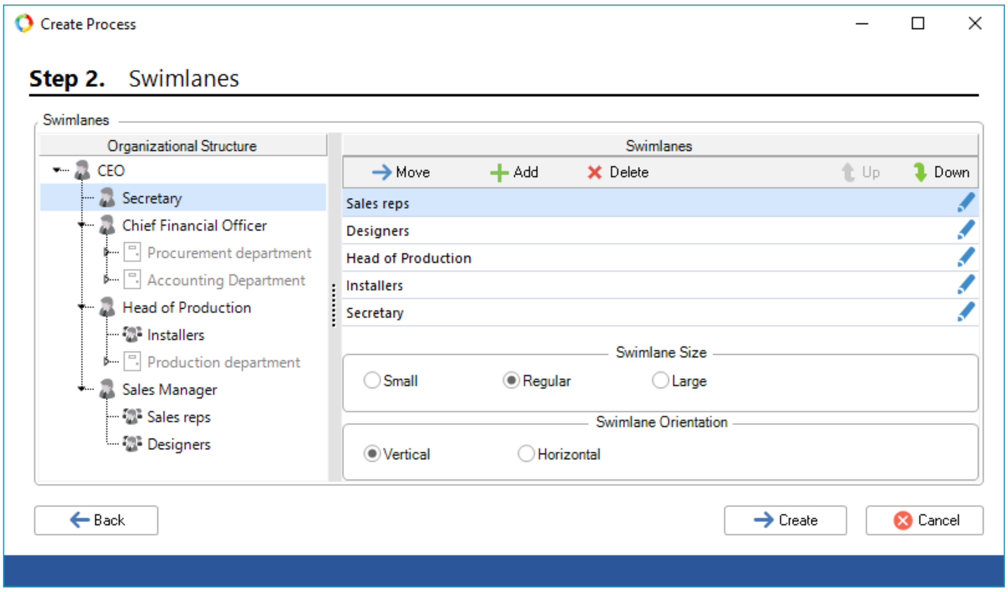


Fig. 126. Creating a business process in the wizard. Step 2

ELMA Designer will automatically open a new tab where you can edit your business process graphic model (Fig. 127).

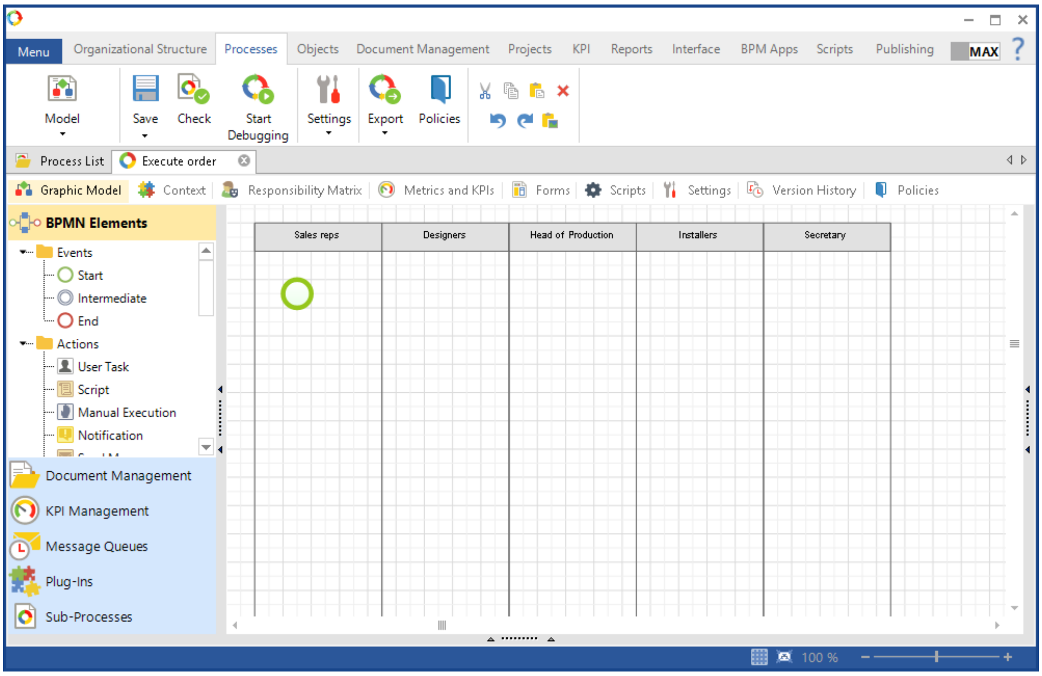


Fig. 127. Editing a business process graphic model on a new tab

Before modeling the process, let's configure the swimlanes: dynamic for sales reps and static for the others. To find out more about swimlanes, read the respective sections of the User Manual on ELMA BPM Platform and ELMA Help.

4.2.3. Configuring the Business Process Context

Now let's create a chain of business process events. It will consist of various tasks, plug-ins, gateways and connectors that will make the process run smoothly (more consistently and predictably). For more details on modeling business processes, read the User Manual on ELMA BPM Platform and ELMA Help.

First, add the following user tasks to the corresponding swimlanes:

1. Create order (Sales reps);
2. Take measurements (Installers);
3. Calculate cost (Designers);
4. Create a Quote for a Client (Sales reps);
5. Sign the contract (Sales reps);
6. Scan the contract (Secretary);
7. Produce windows (Head of Production);
8. Install windows (Installers).

Arrange the tasks as they are in the picture below (Fig. 128):

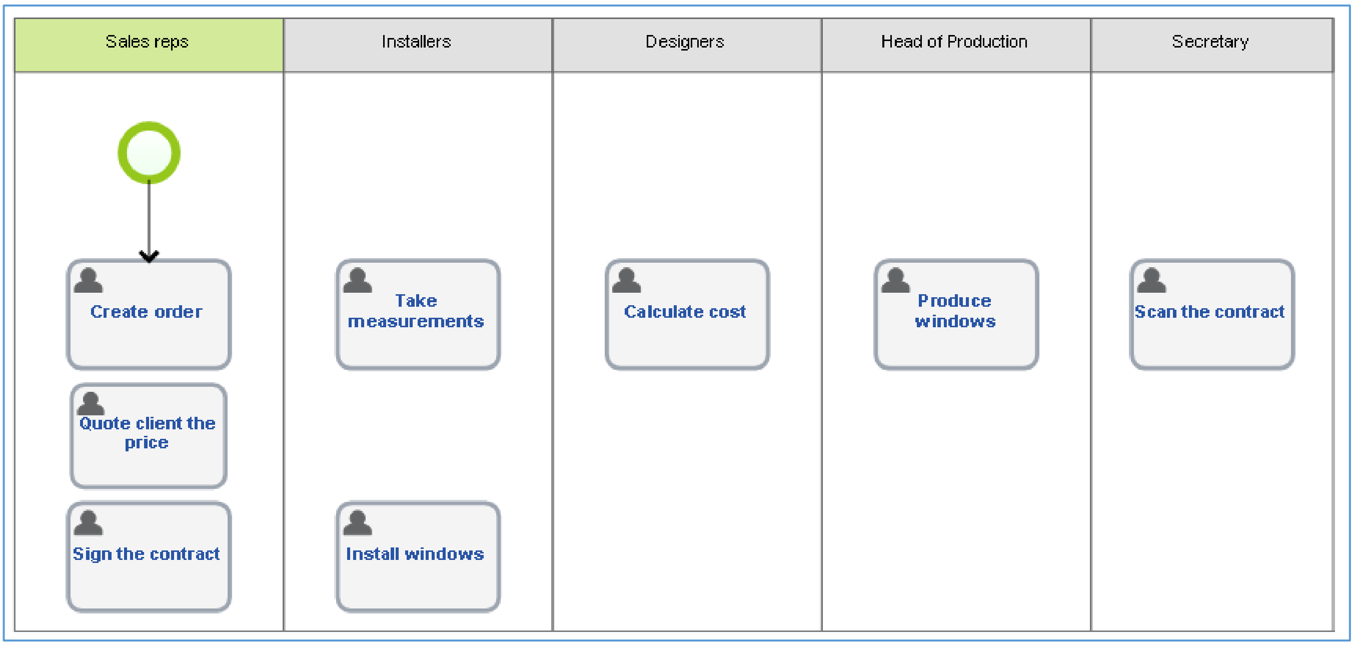


Fig. 128. Arranging user tasks in swimlanes

The next step is to set up the business process context. Context is a set of task properties that are used during a process. For more details on how to work with context, see the **Business Process Context** section in the [User Manual on the ELMA BPM Platform]().

Here are the context variables used in this business process (Fig. 129):

Displayed Name	Property Name	Type	Search	Input	Output
Base Properties					
Order	Order	Deal (Object)	☑	☐	☐
Customer	Customer	Individual (Object)	☑	☑	☐
Measurements date	MeasurementsDate	Date/Time	☐	☐	☐
Installation date	InstallationDate	Date/Time	☐	☐	☐
Designers	Designers	User (Object)	☐	☐	☐
Sales reps	SalesReps	User (Object)	☐	☐	☐
Head of production	HeadOfProduction	User (Object)	☐	☐	☐
Installers	Installers	User (Object)	☐	☐	☐
Secretary	Secretary	User (Object)	☐	☐	☐
Order description	OrderDescription	String	☐	☐	☐
Completion forms	CompletionForms	Attachment (Object)	☐	☐	☐
Measurements	Measurements	Attachment (Object)	☐	☐	☐
Cost estimate	CostEstimate	Attachment (Object)	☐	☐	☐
Payment	Payment	Money	☐	☐	☐
Design project	DesignProject	Attachment (Object)	☐	☐	☐
Contract scan	ContractScan	Attachment (Object)	☐	☐	☐
Process instance status	ProcessInstanceStatus	Drop-Down List	☑	☐	☐
Contract document	ContractDocument	File (Document)	☐	☐	☐
Initial cost	InitialCost	Money	☐	☐	☐
Order creation date	OrderCreationDate	Date/Time	☐	☐	☐

Fig. 129. List of context variables necessary in the 'Execute order' process

Note that the last property (**Order Creation Date**) is used to create business process instance names (see Section 4.2.4) and to generate document templates (see Section 4.3). In the property settings, specify the Property type – Date/Time and check the **Set current date** box (Fig. 130).

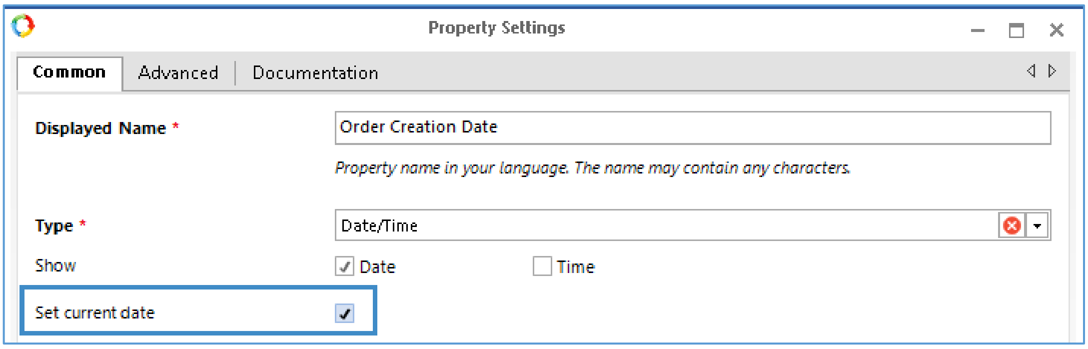


Fig. 130. Order creation date property settings

Now let's configure the context variables in user tasks. To the first task 'Create order', add the previously created variables: **Order Creation Date, Customer, Measurements Date** and **Order Description**. The first two must be **Read only**, the second – **Required** (Fig. 131).

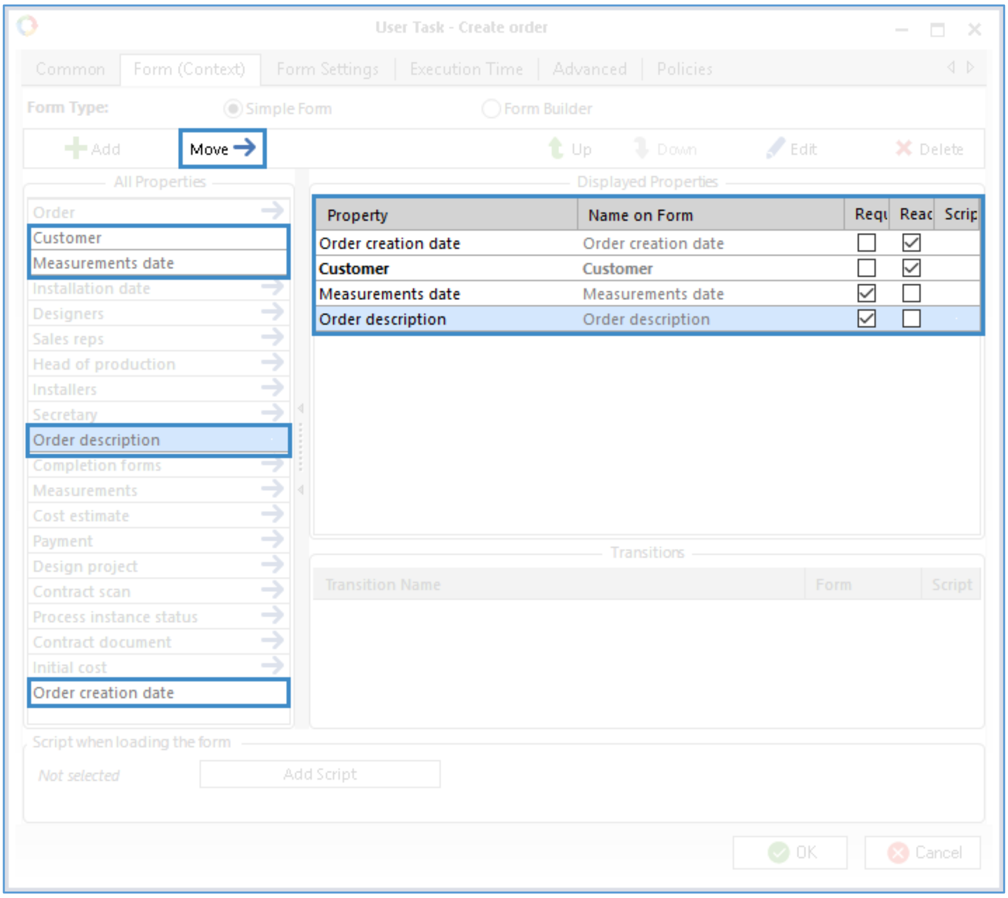


Fig. 131. Configuring properties of the 'Create order' user task

You can also use the **Form Builder** to configure context variables. The form builder allows you to see how the properties will be displayed on a task page in the web application (Fig. 132).

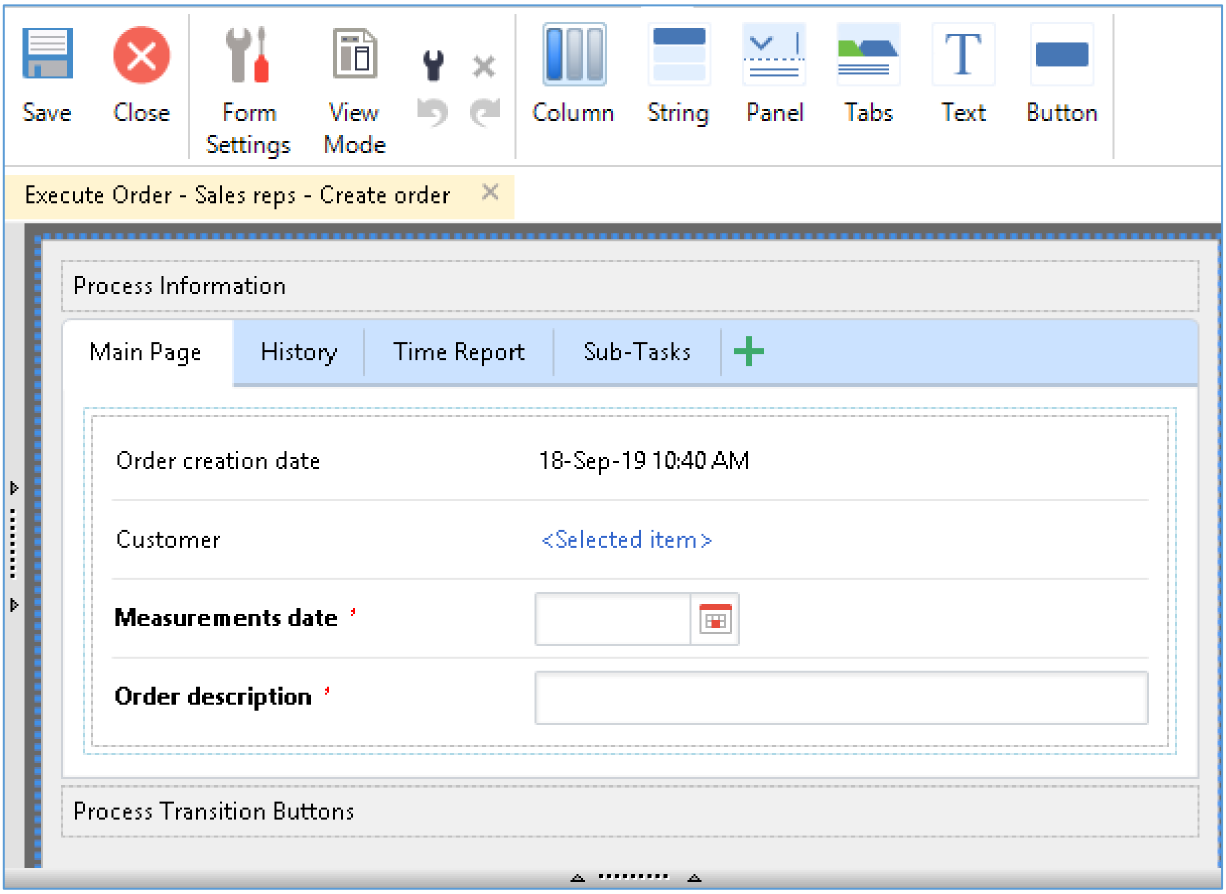


Fig. 132. Configuring context variables in the form builder

In the same way, add these properties to all the business process tasks (Fig. 133 – Fig. 139):

Property	Name on Form	Requ	Reac	Scrip
Customer	Customer	☐	☑	
Postal Address	Postal Address	☐	☑	
Phone Number	Phone Number	☐	☑	
Measurements date	Measurements date	☐	☑	
Measurements	Measurements	☑	☐	

Fig. 133. Take measurements task property settings

Property	Name on Form	Requ	Reac	Scrip
Measurements	Measurements	☐	☑	
Design project	Design project	☑	☐	
Cost estimate	Cost estimate	☑	☐	
Initial cost	Initial cost	☑	☐	

Fig. 134. Calculate cost task property settings

Property	Name on Form	Requ	Reac	Scrip
Customer	Customer	☐	☑	
Phone Number	Phone Number	☐	☑	
Cost estimate	Cost estimate	☐	☑	

Fig. 135. Quote client the price task property settings

Property	Name on Form	Requ	Reac	Scrip
Customer	Customer	☐	☑	
Cost estimate	Cost estimate	☐	☑	
Contract document	Contract document	☐	☑	
Installation date	Installation date	☑	☐	
Payment	Payment	☑	☐	

Fig. 136. Sign the contract task property settings

Property	Name on Form	Requ	Reac	Scrip
Contract scan	Contract scan	☑	☐	

Fig. 137. Scan the contract task property settings

Property	Name on Form	Requ	Reac	Scrip
Measurements	Measurements	☐	☑	
Design project	Design project	☐	☑	
Installation date	Installation date	☐	☑	

Fig. 138. Produce windows task property settings

Property	Name on Form	Requ	Reac	Scrip
Customer	Customer	☐	☑	
Postal Address	Postal Address	☐	☑	
Installation date	Installation date	☐	☑	
Completion forms	Completion forms	☑	☐	

Fig. 139. Install windows task property settings

Once all the tasks are configured, set up their transitions. For these purposes, use:

- **Connectors** (indicate the sequence of activities);
- Intermediate events with a **Timer** (pause a process until a certain time);
- **Parallel gateways** (send a process along several routes simultaneously);

- **End events** (indicate the end of a process instance).

At this stage, the graphic model of the business process looks like that (Fig. 140):

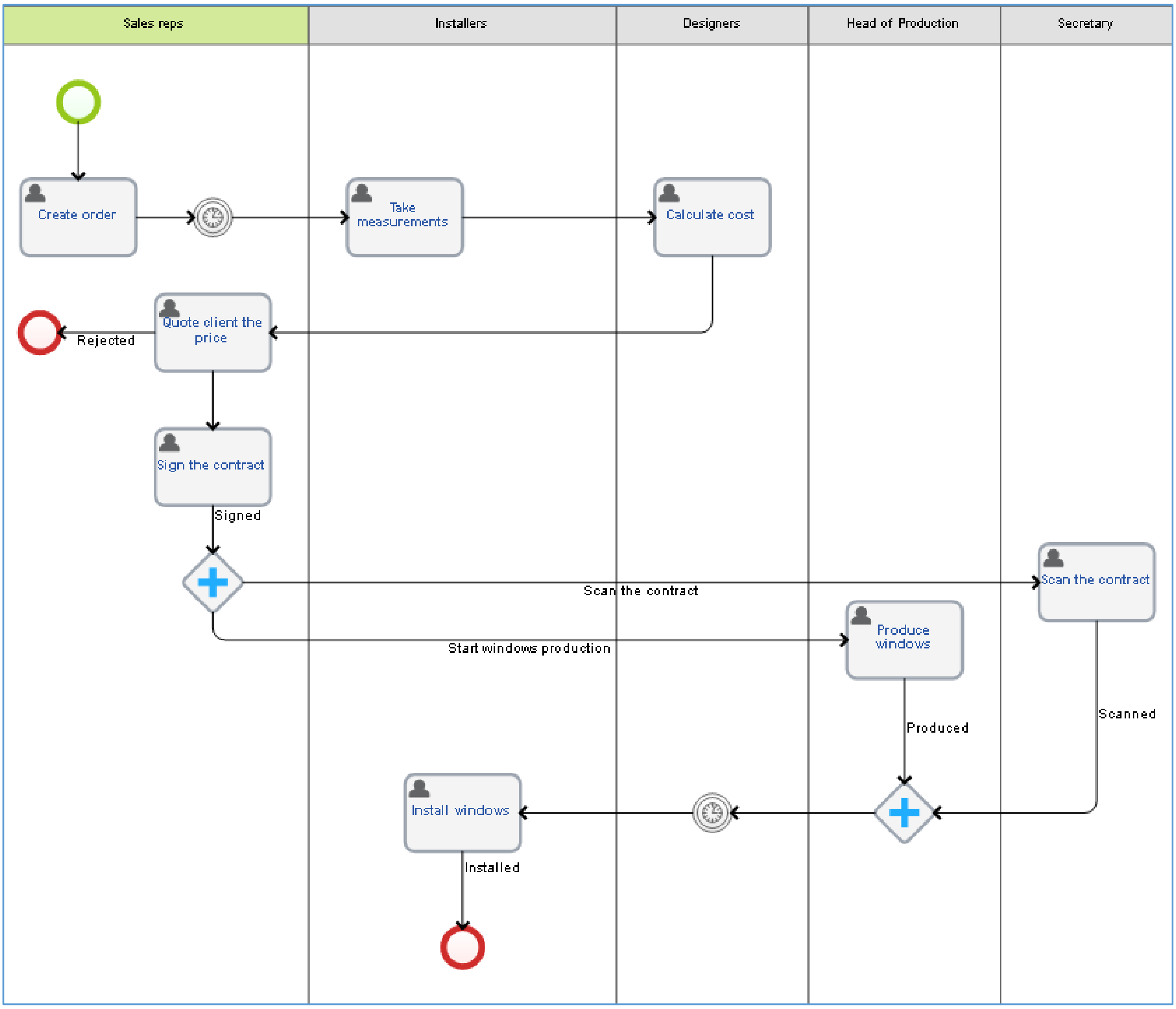


Fig. 140. Graphic model of the execute order process

We have just modeled a process that covers all the stages of a customer's request: from its registration to closing a deal (windows installation). Next, let's fine-tune the process so that it helps to obtain analytical information.

4.2.4. Instance Names Generation

After the context is set, create process instance naming rules so that instance names are generated automatically each time you start the process.

While modeling the process, click on the arrow below the **Settings** button and select **Instance name**. In the window that opens, select **Template – Insert Variable – Context – Customer – Name.**

After that add the following text to the **Template** field: **Order {$Instance.StartDate}** as shown in Fig. 141:

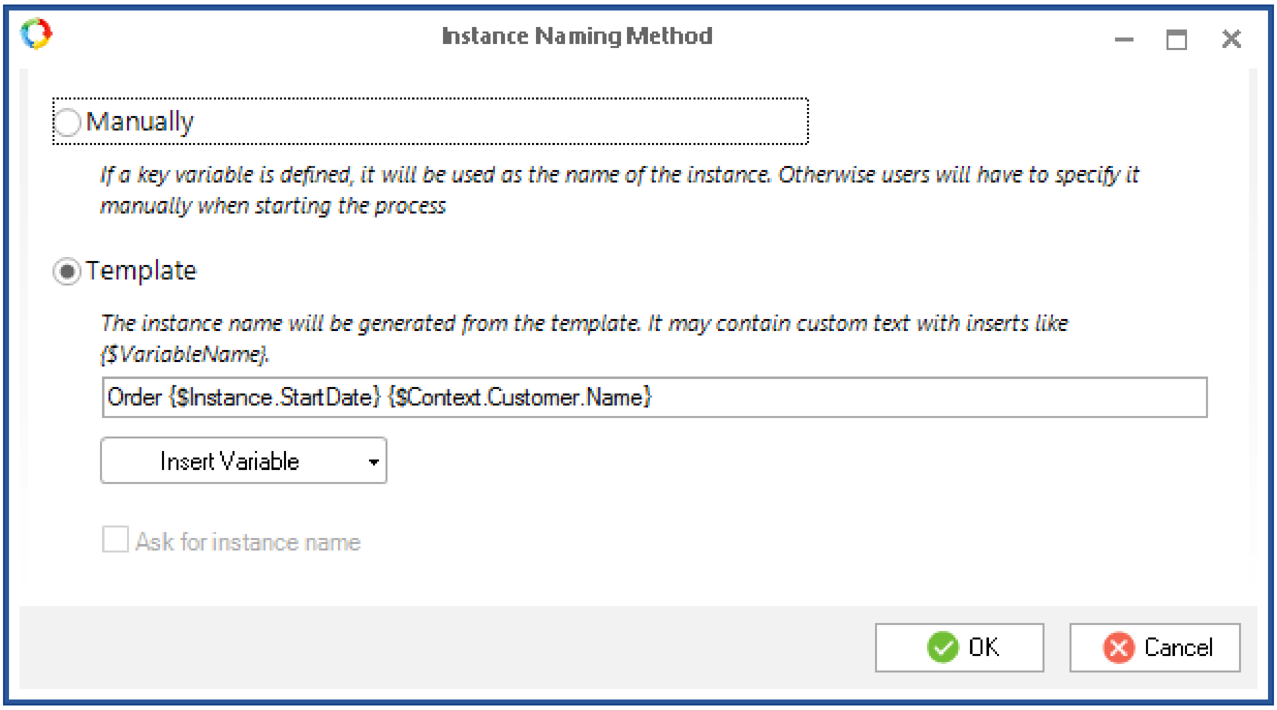


Fig. 141. Instance name template

We have finished configuring the instance name.

4.2.5. Displaying Progress on an Order

To display the progress, you can change either process instance statuses or deal stages.

In our example, we will use the status change.

4.2.5.1. Configuring Process Instance Statuses

Process instance statuses help to track process execution stages and search for process instances (e.g. all orders that have the 'Taking measurements' status)

Let's configure the automatic status change for the 'Order execution' process.

First of all, define the process stages and create the corresponding statuses. To do so, click the arrow below **Settings** and select **Instance Statuses** (Fig. 142).

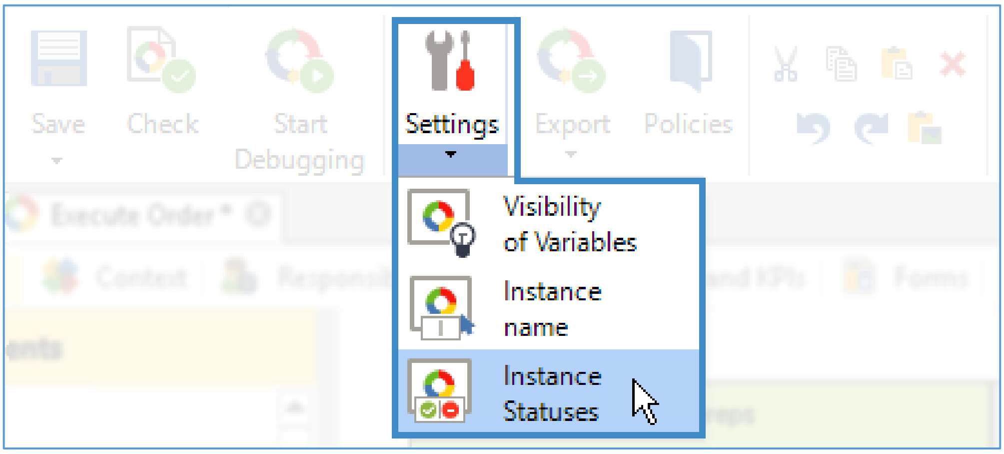


Fig. 142. Instance statuses settings button

In the window that opens, **Add** a new **Variable** that will define and store the process instance status. While adding the variable, don't make any changes – just click **OK**. After that click **Add Status** and fill in the newly created variable with statuses that your process instances might have. Finally, at the bottom of the window click **Select Action** to configure what will happen when a process instance is interrupted and choose **Reset Status** (Fig. 143).

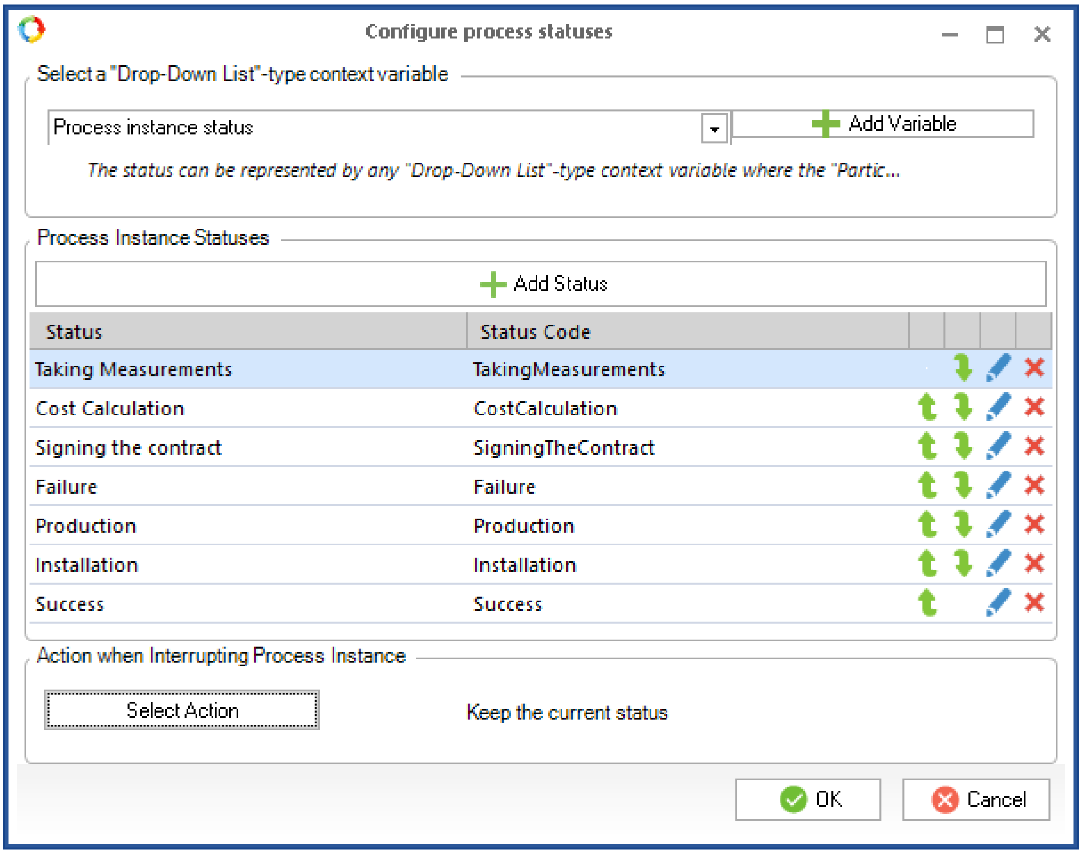


Fig. 143. Configure process statuses window

The next step is to place the **Change Process Instance Status** plug-in onto the graphic model in the places where a new stage of your workflow begins.

You can find this activity in the left sidebar in the **Plug-Ins** section (Fig. 144).

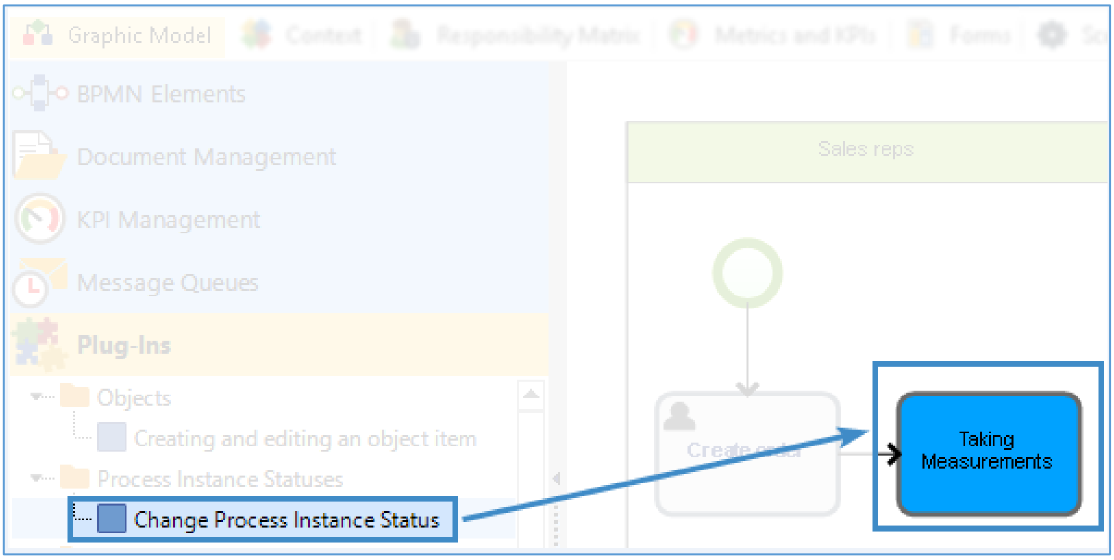


Fig. 144. Dragging a plug-in onto the process model

Double-click on the plug-in to open the settings. Specify the **Name** of the status that will be set and go to the **Settings** tab. In the drop-down list, select the **Status** that will be assigned to the process instance when executing this task. Click **OK** to confirm (Fig. 145)

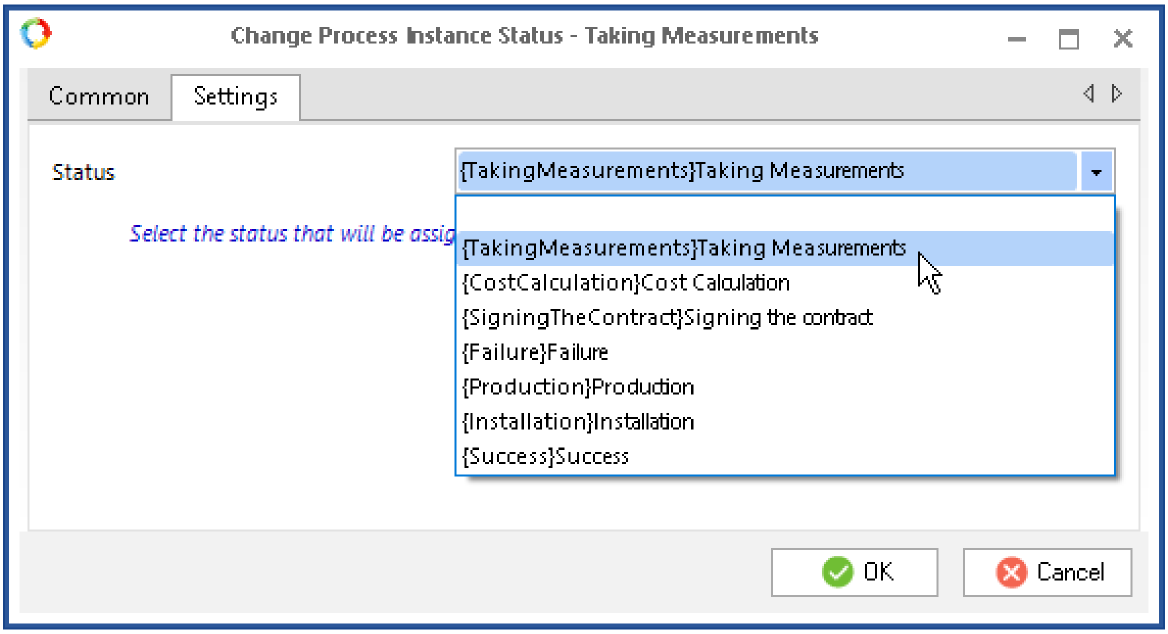


Fig. 145. Change process instance status plug-in settings

In the same way, specify statuses for each plug-in in the model.

After publishing the process and starting it in the web application, you can track the process instance progress by statuses in the **Process monitor** on the **Statuses** panel (Fig. 146).

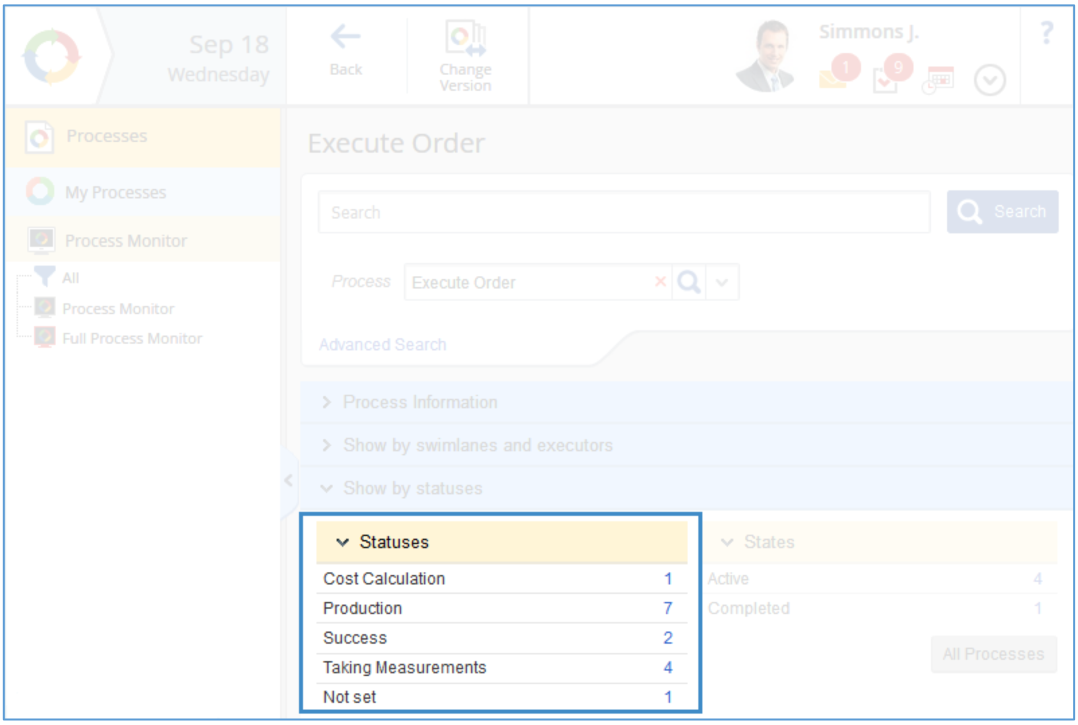


Fig. 146. Process monitor page. Statuses panel

4.2.5.2. Creating and Changing a Deal in Processes

One more way to track the workflow progress is to use the **Deal** object. Below you will find an example of a process modeled with the help of special plug-ins for managing deals.

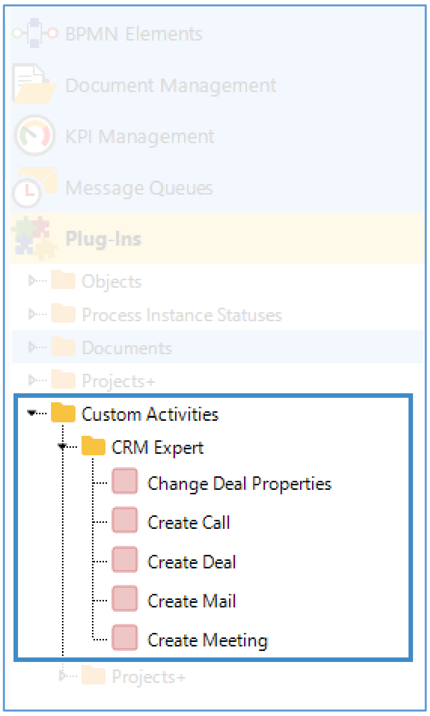


Fig. 147. Plug-ins – Custom Activities – CRM Expert

You can start the business process right from an individual page. The first process step is to automatically create a deal. To do so, drag the **Create Deal** activity (Fig. 148) from the sidebar onto the graphic model. You can find the activity in the **Plug-Ins** section > **Custom Activities** folder.

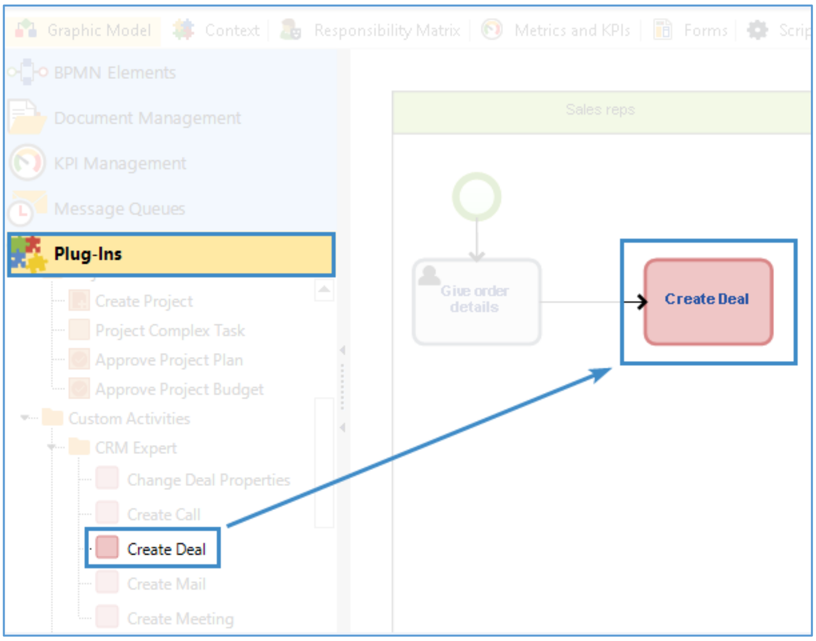


Fig. 148. Adding the create deal plug-in onto the process graphic model

Double-click on the activity to open its settings. Specify the following parameters on the **Input/Output Attributes** tab (Fig. 150):

- **Name –** enter the fixed value 'Installing windows';
- **Deal type –** you can find the identifier in the web application. Just open the deal type object page: the identifier is the last number in the address bar (Fig. 149). Then click **Check** to find the previously created deal type;
- **Contractor** – specify the **Customer** property from the **Context** of the business process;
- **Responsible** – **Sales reps** property.

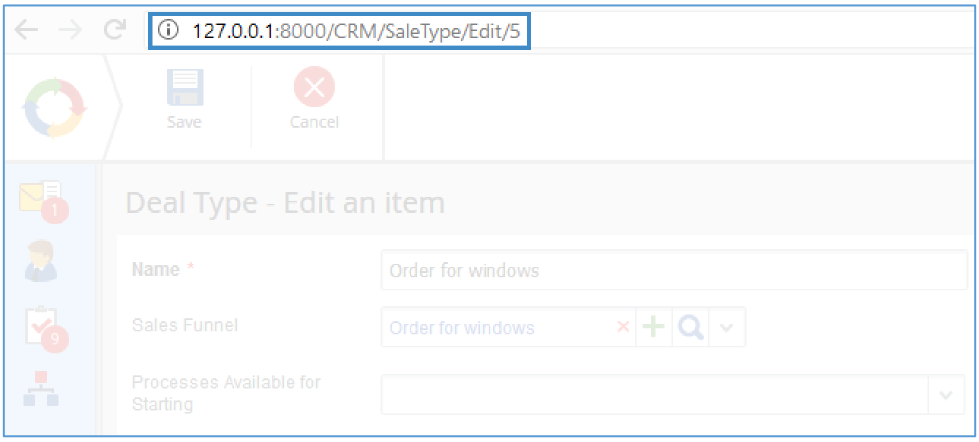


Fig. 149. Deal type ID

In the **Output Variables** list there is only one parameter – **Deal**, specify the property **Order** for it.

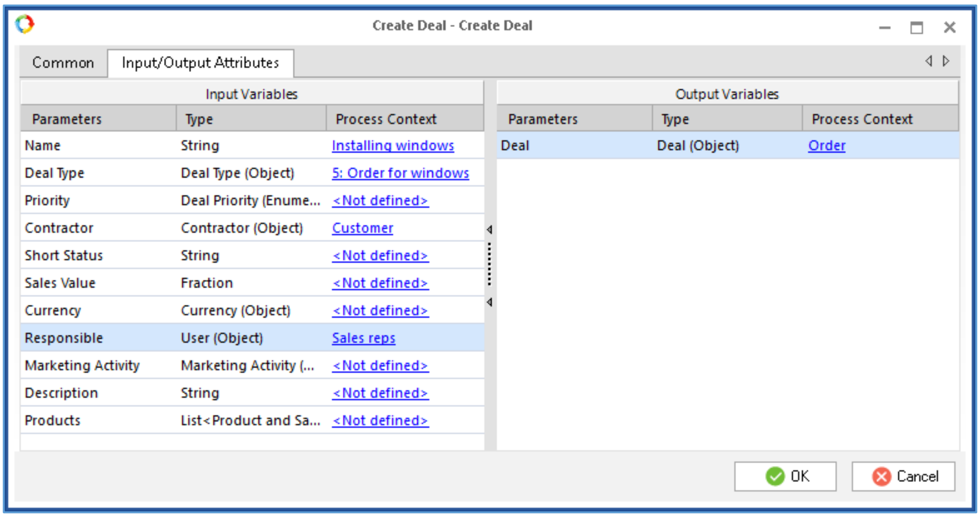


Fig. 150. Create deal activity settings

The next activity is **Change Deal Properties,** which will change the stage at required steps. Add the following variables to the activity:

- **Deal – Order** property from the business process;
- **Deal Status –** the **Active** value for all steps except for the last ones;
- **Deal Stage –** enter the **Deal Stage** ID. You can find the ID in the **Sales Funnel** settings window (Fig. 151).

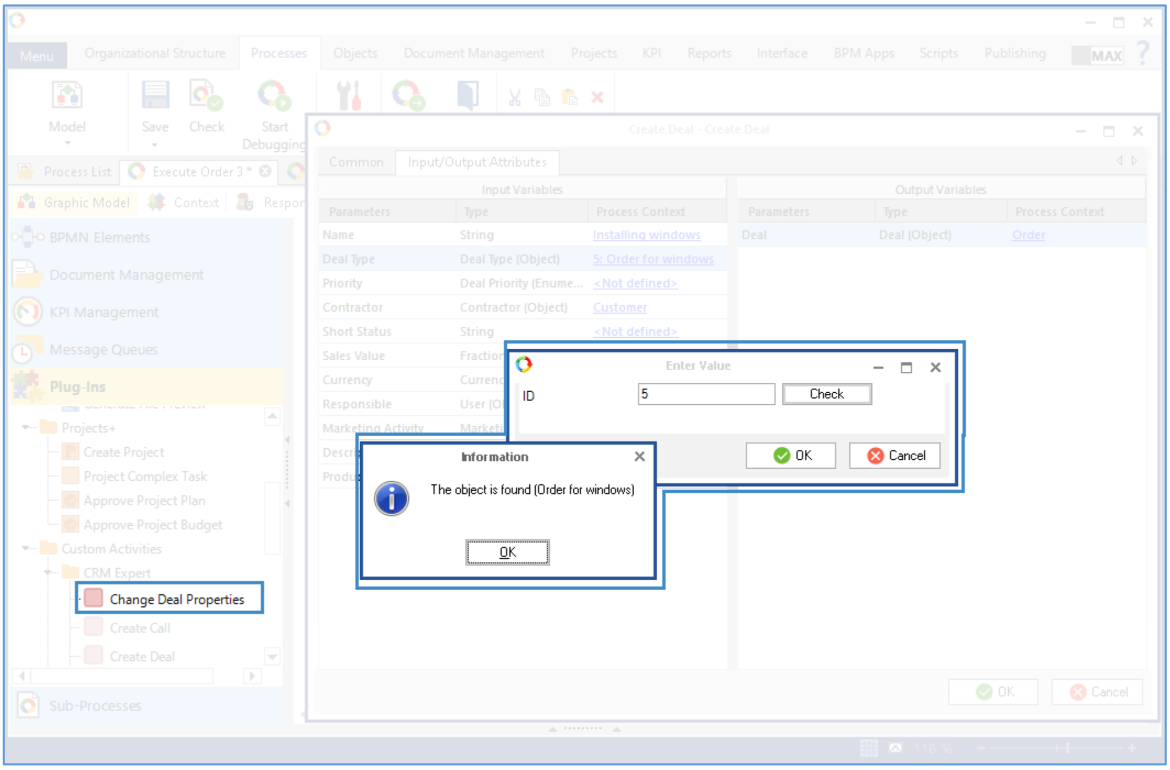


Fig. 151. Change deal properties activity settings. Deal stage ID

At the final stages of the business process, in the same activity specify the **Deal** statuses: **Closed (success)** and **Closed (failure)** (Fig. 152).

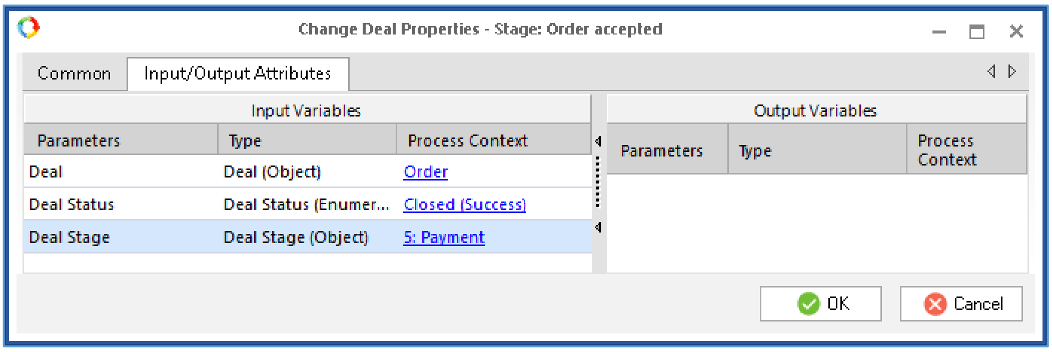


Fig. 152. Change deal properties activity settings. Final stage

As a result, the **Graphic model** of the process will look something like this:

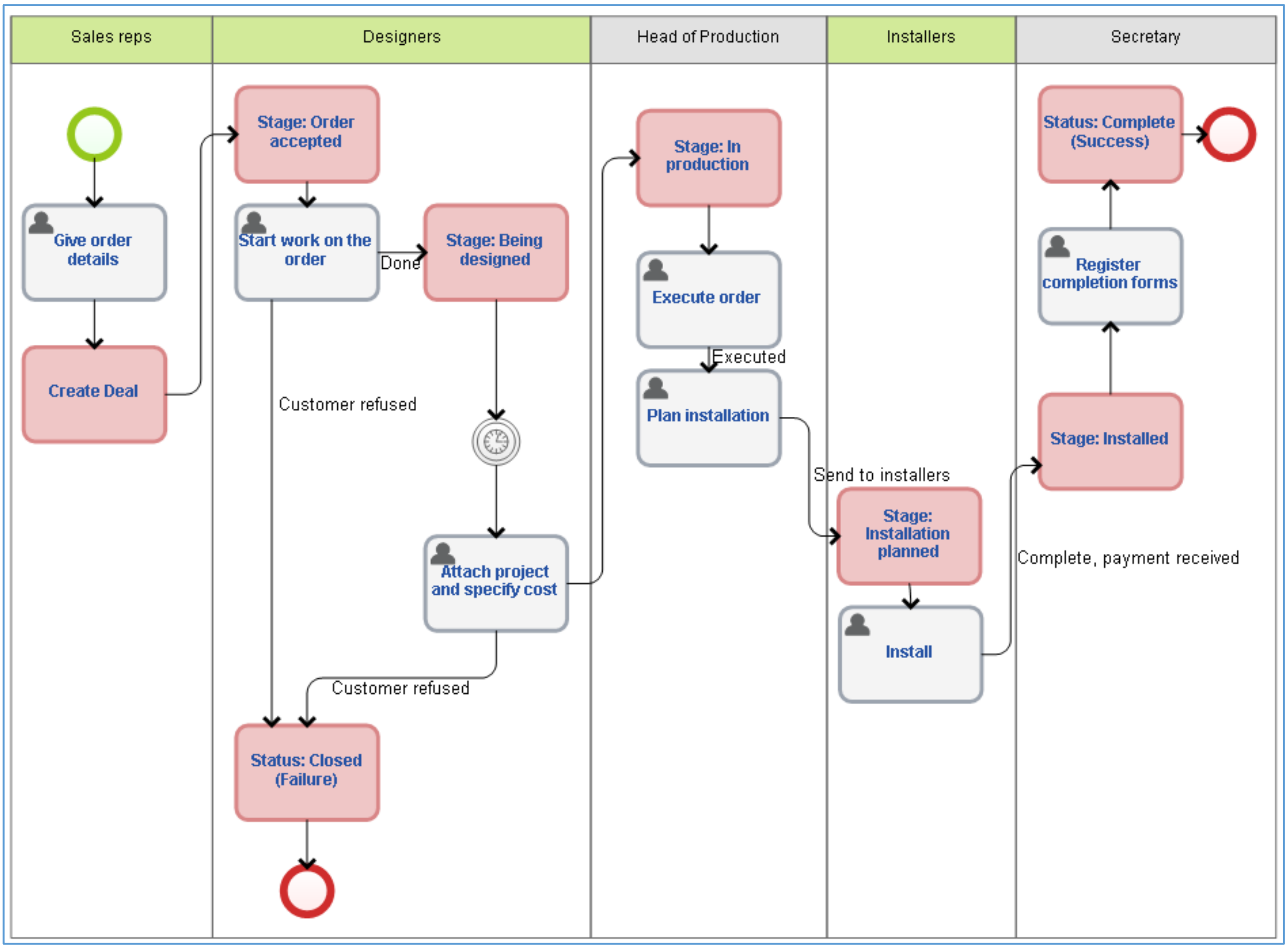


Fig. 153. The process graphic model after configuring deal activities

When you use such a process, see the status analytics in the **CRM** section – **Deal Dynamics**. Read more about deal dynamics in section 5.4.2.

4.3. Document Generation

When you work with a flow of orders, it's important not to make any mistakes in documents. To this end, the feature that allows generating documents/files by a template might come in handy. In ELMA, there are various ways to configure document generation, and most of them are a part of the **ELMA ECM+ Application**. However, as an example, we will use another way: The **Generate Document Version** activity included in the standard set of BPMN elements.

4.3.1. How to Work with Templates

First, create a template. In a text editor, open the contract template that your company uses (Fig. 154).

Product Supply Agreement

This Supply Agreement (the 'Agreement') is effective [DATE];

BETWEEN:	**WishWindow** (the 'Supplier'), a company organized and existing under the laws of the US/Texas, with its head office located at 642 Yukon Drive Pearland, TX 77581.
AND:	**[Customer]** (the 'Purchaser'), an individual with his/her main address located at [CUSTOMER'S ADDRESS].

1. MATERIAL AND LABOR PROVIDED

The Supplier agrees to provide all of the material and labor required to perform the following work for:

- Window Production
- Window Delivery
- Window Installation

Fig. 154. Contract template source document

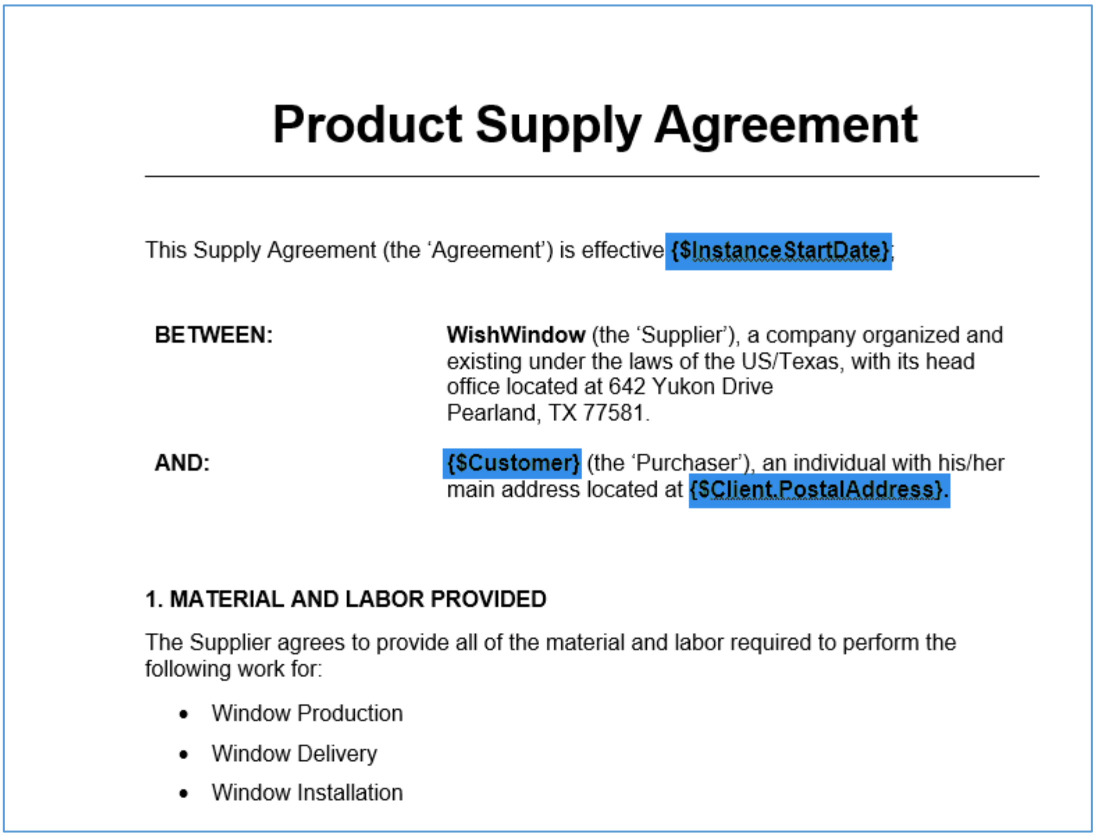
Fill in the blanks with variables using the template language. To find out more about document generation, read the **Creating Document from Template** section in the **User Manual on ELMA ECM+ Application**.

The template must contain the system property names previously created in the **Context**. Therefore, in our example the property names are **InstanceStartDate** that will be used to designate the agreement date; **Customer; Client.PostalAddress.**

Fill in the fields for generation:

- **{$InstanceStartDate}** – **business process** start date;
- **{$Customer }** – **Individual** object;
- **{$Client.PostalAddress}** – **Customer** address.

Now you have a template ready for use in the business process (Fig. 155).



Product Supply Agreement

This Supply Agreement (the 'Agreement') is effective {$InstanceStartDate};

BETWEEN:	**WishWindow** (the 'Supplier'), a company organized and existing under the laws of the US/Texas, with its head office located at 642 Yukon Drive Pearland, TX 77581.
AND:	{$Customer} (the 'Purchaser'), an individual with his/her main address located at {$Client.PostalAddress}.

1. MATERIAL AND LABOR PROVIDED

The Supplier agrees to provide all of the material and labor required to perform the following work for:

- Window Production
- Window Delivery
- Window Installation

Fig. 155. The first paragraph of the prepared document template

You can add a few more fields that correspond to the variables in the process. These fields can also be automatically filled by a template:

- **{$InitialCost}** – agreement value;
- **{$InstallationDate}** – installation date;
- **{$Salesforce}** – company representative's signature.

We have finished configuring the template.

4.3.2. Configuring Generate Document Version Activity

Add the **Generate Document Version** activity to the business process model right after the 'Calculate Cost' user task. You can find the activity in the sidebar in the **Plug-Ins** section (Fig. 156).

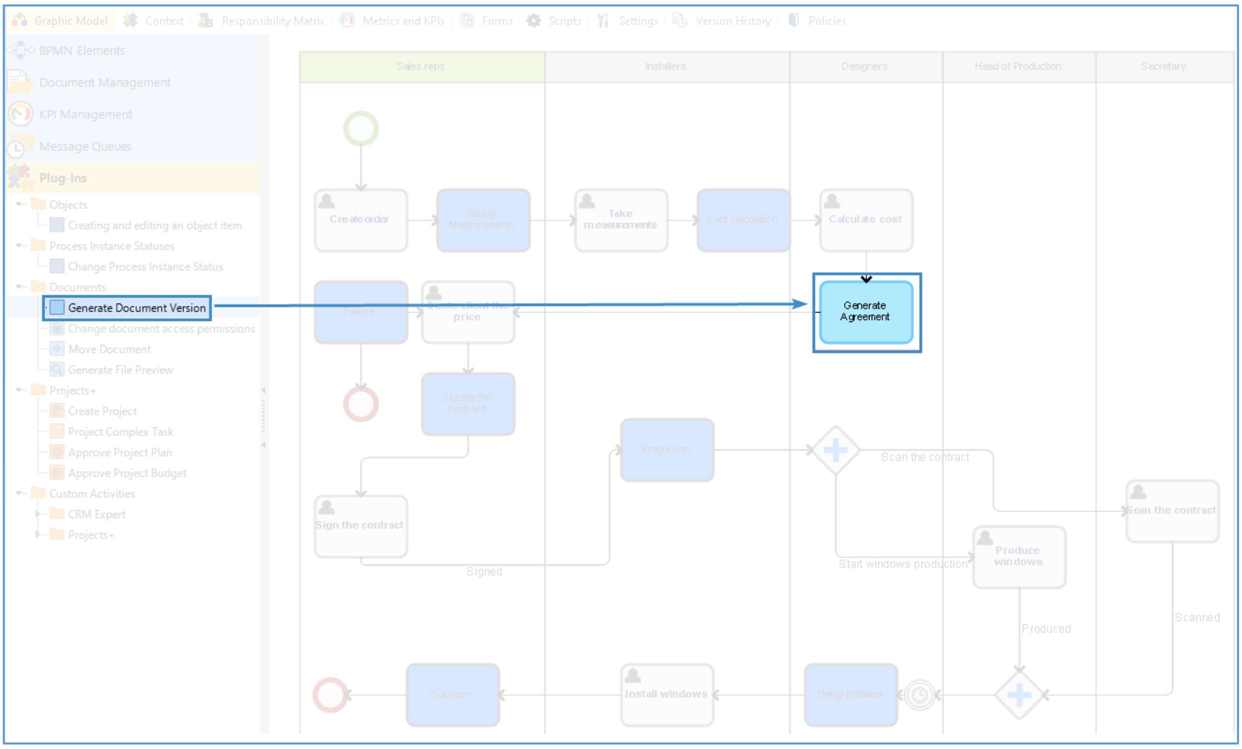


Fig. 156. Adding the generate document version activity

Open the activity, go to the **Settings** tab and click **Add** (Fig. 157).

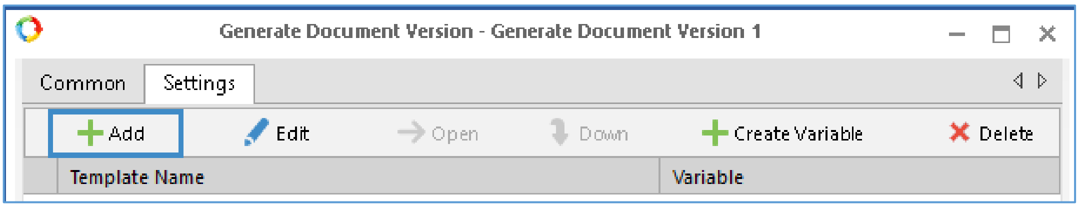


Fig. 157. Adding a template in the generate document version activity settings

Select **File** as the **Template Type** and click **Open** to the right of the **Template File** field to add the previously created template (Fig. 158).

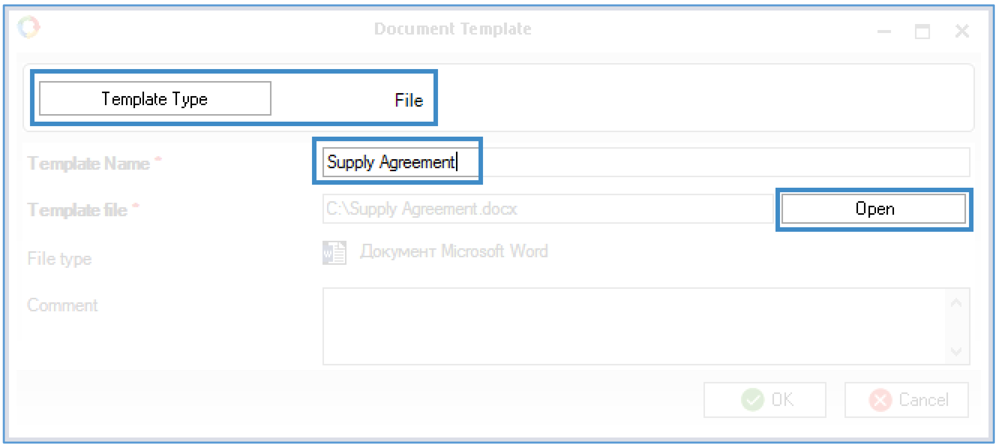


Fig. 158. Document template settings

Fill in the **Template Name** field and click **OK** to save the file.

After adding the template, you need to specify in which context property will store the generated result. The property must be of the **File** type. Since in our business process context there is no such a property, let's create it. To do so, click **Create Variable** (Fig. 159).

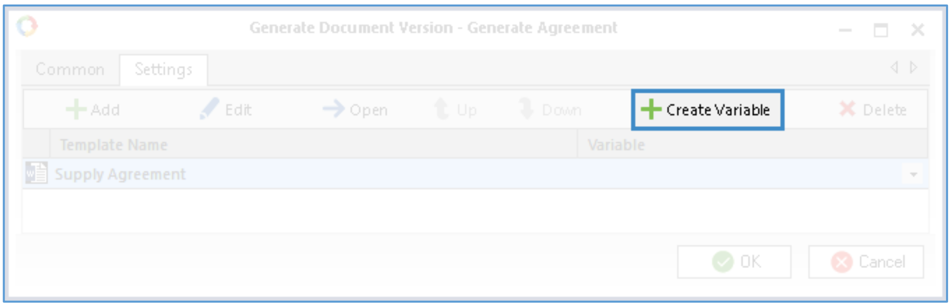


Fig. 159. Add variable button that allows you to create a property that will store the generated result

In the pop-up window, the property type (**File**) is already selected, so you just need to enter the property name and click **OK** (Fig. 160).

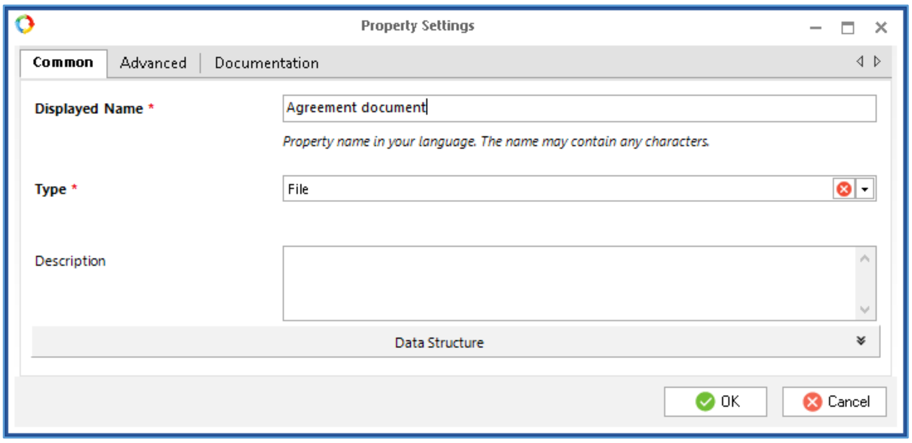


Fig. 160. Adding a new property

Now you can select the variable in the **Settings** of the **Generate Document Version** activity (Fig. 161).

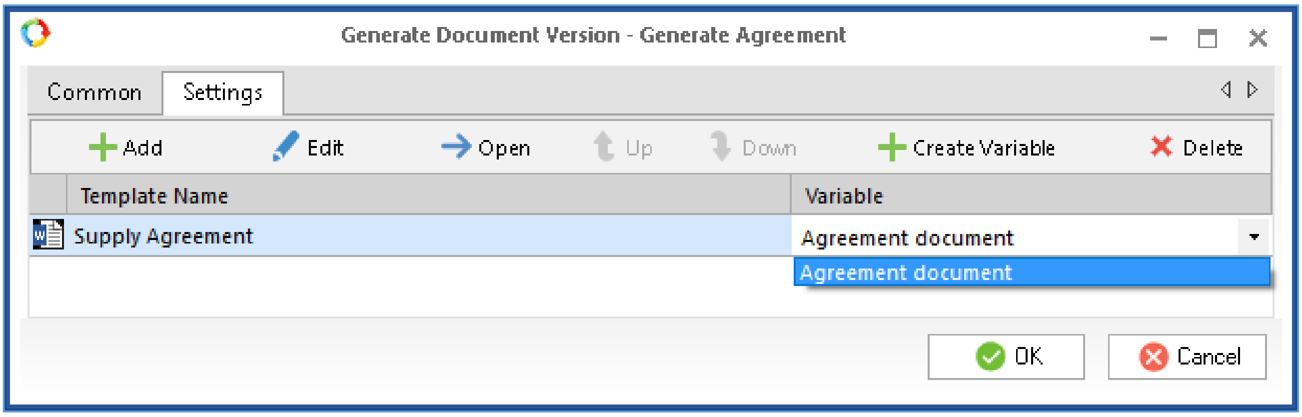


Fig. 161. Selecting the created property in the generate document version activity

When a process flow reaches this activity, a contract will be generated and saved in the **Agreement document** property. Let's add this property to the 'Sign Contract' task form so that users can see the file (Fig. 162).

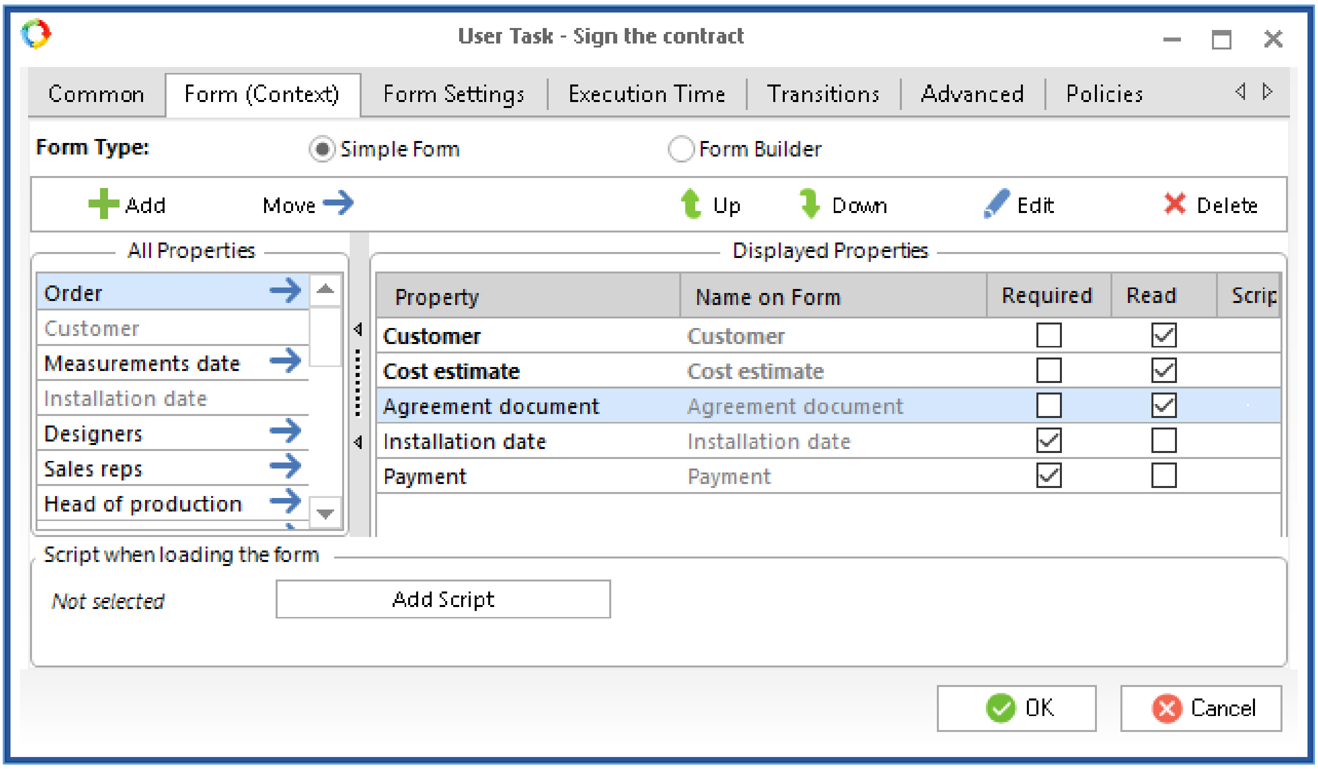


Fig. 162. Sign the contract task

On the task form, a sales rep will see the automatically generated agreement and will be able to read it in the browser (Fig. 163), or download and open it on his/her computer, change it and then attach it to the **Attached Files** field.

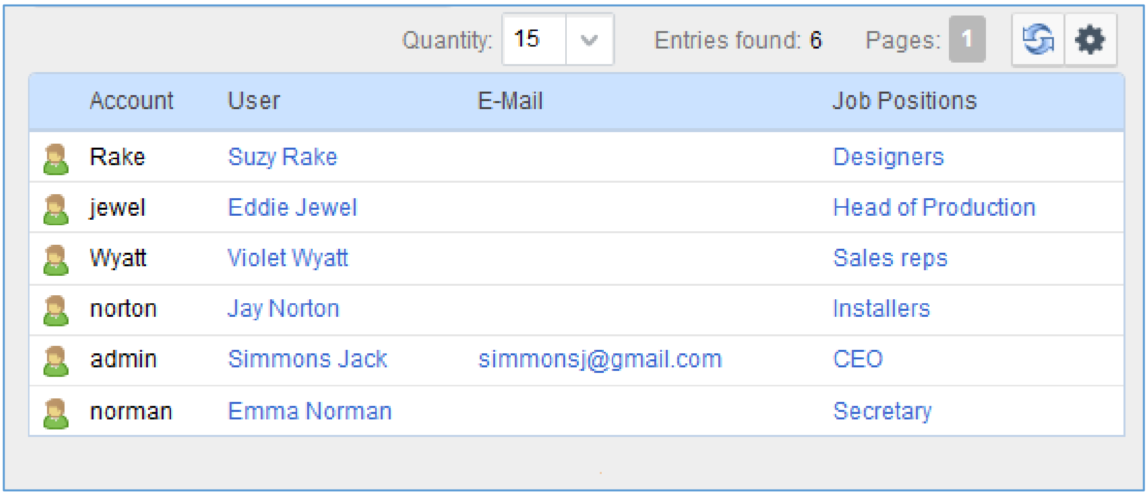
Fig. 163. Document preview window in the web application

We have finished configuring the document generation.

4.4. Use Cases

It's time to go through the use cases for the set-up configuration.

First, let's create users that will do tasks during the business process (Fig. 164). To find out about how to add new users to the system, read this Help page.



Quantity: 15 Entries found: 6 Pages: 1

Account	User	E-Mail	Job Positions
Rake	Suzy Rake		Designers
jewel	Eddie Jewel		Head of Production
Wyatt	Violet Wyatt		Sales reps
norton	Jay Norton		Installers
admin	Simmons Jack	simmonsj@gmail.com	CEO
norman	Emma Norman		Secretary

Fig. 164. List of users and their positions necessary for the configuration

Then log in to the system under a sales rep account. Their main page will look as follows if the interfaces are configured (see Chapter 8) (Fig. 165):

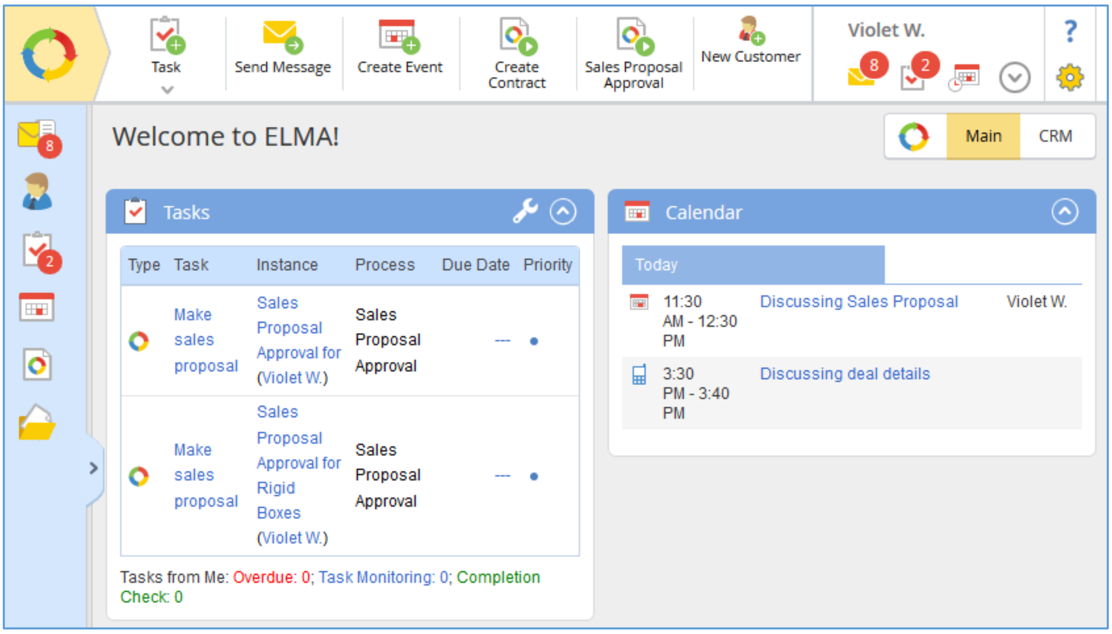


Fig. 165. ELMA web application main page

First, hit the **New Customer** button in the top toolbar (Fig. 166).

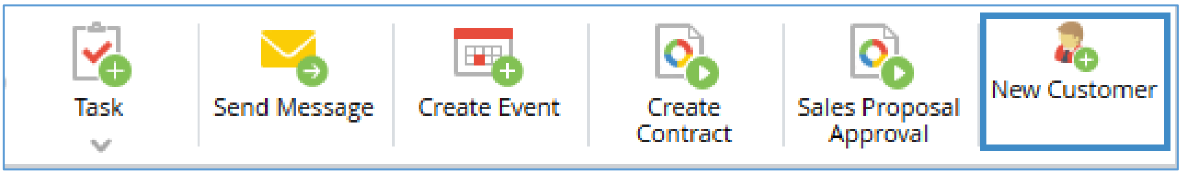


Fig. 166. Adding an individual in the system

Select **Individual** type and then fill in the fields on the object creation/editing form (Fig. 167, Fig. 168):

- First Name;
- Last Name;
- Phone Number;
- Postal Address;
- Attributes.

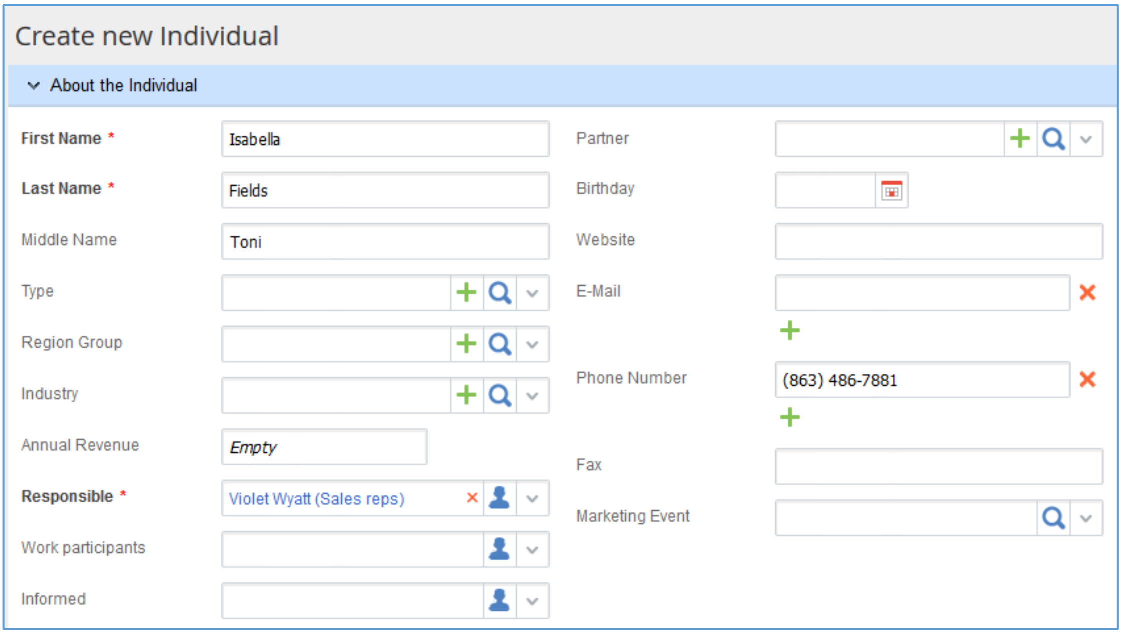


Fig. 167. Create new individual form

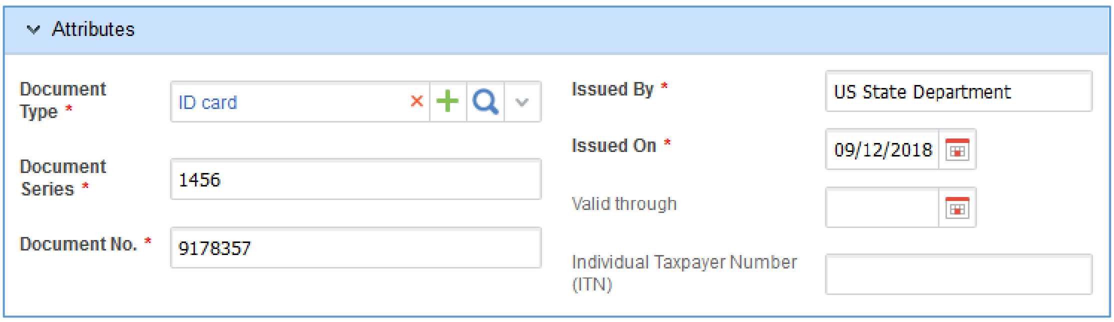


Fig. 168. Create new individual form. Filling in the fields on the attributes panel

Click **Save** in the top toolbar. The created individual page will look like in Fig. 169.

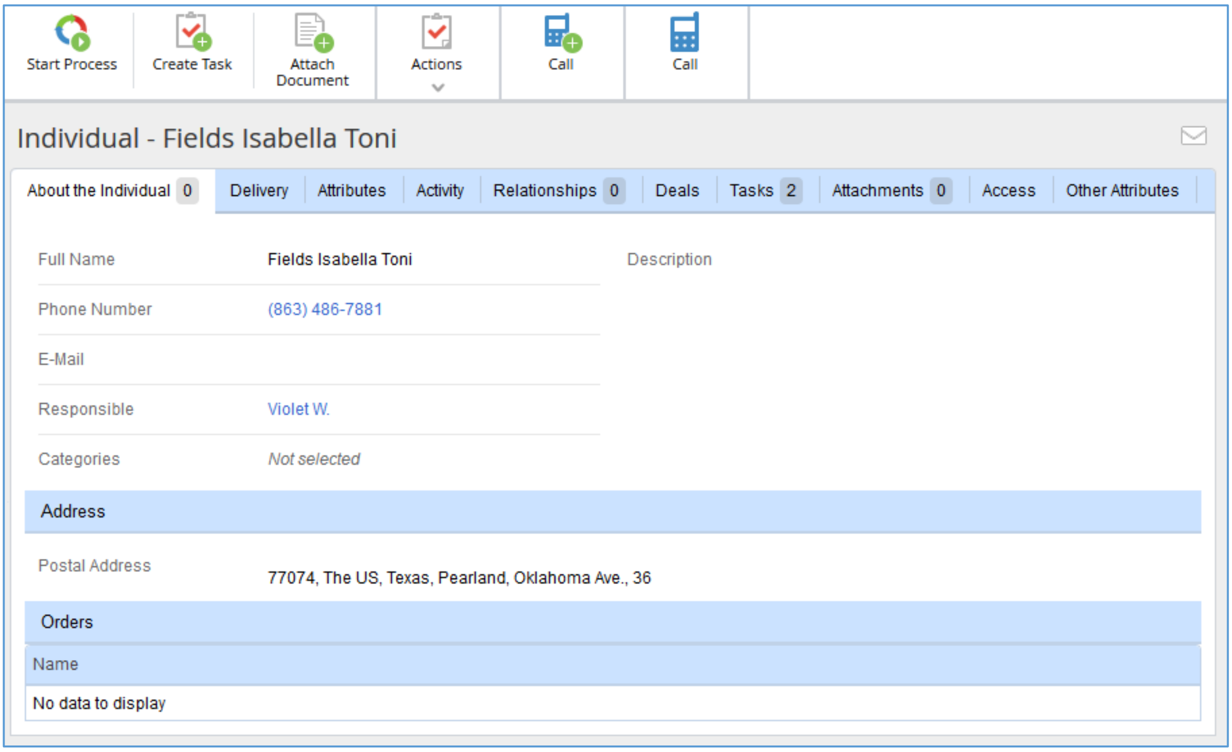


Fig. 169. Newly added individual page

To begin the sale, start the 'Execute Order' business process right from the individual page. Click **Start process** in the toolbar, in the **Process*** field select 'Execute Order', and hit **Send** (Fig. 170).

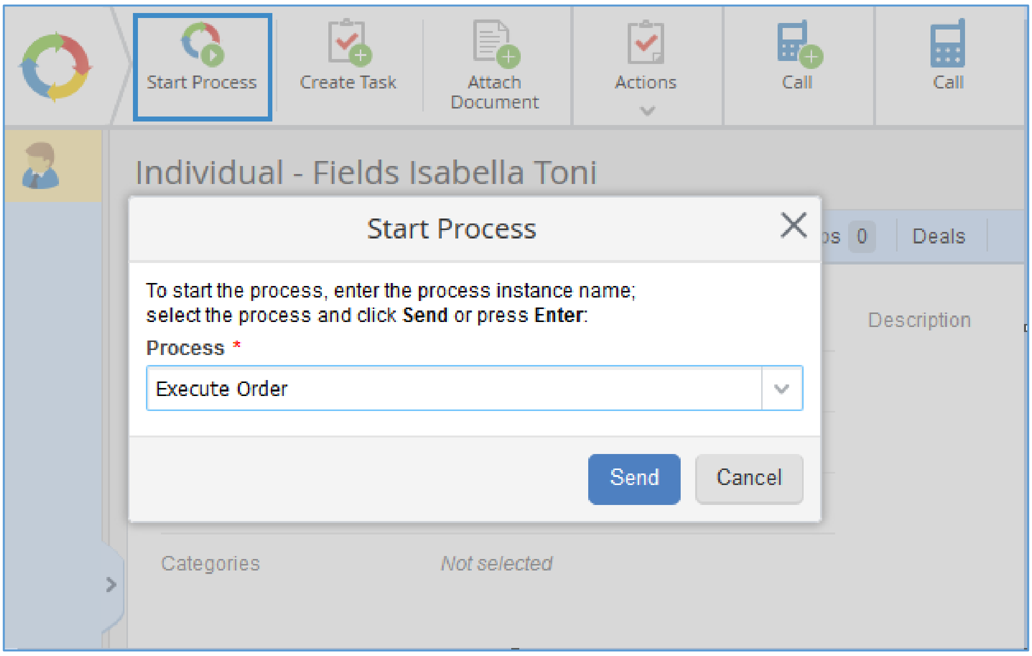


Fig. 170. Starting the business process from an individual page

The first business process task is 'Create order'. Here the sales rep can see the order creation date, the customer's name, and the date and time fields where he/she specifies when the measurements must be taken. In the required **Order description** field, the sales representative will briefly describe the order details and customer wishes. Click the **Take measurements** button to go to the next task (Fig. 171).

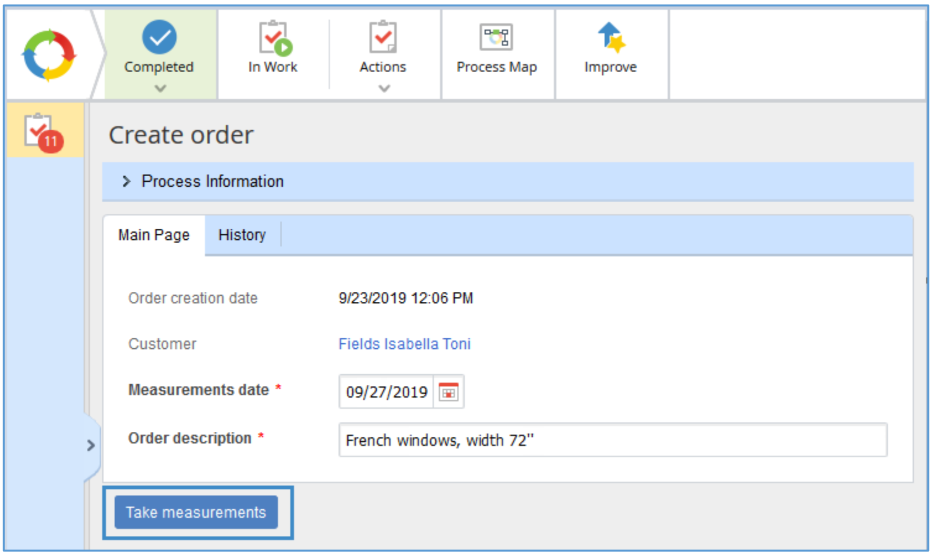


Fig. 171. Create order task in the execute order business process

The second task is 'Take measurements'. The installer Jay Norton is the current executor of the task. He will open the task page and see the customer's name, address, phone number and the measurement date. After the job is done, attach the file with measurements to the **Measurements** field. Click **Calculate Cost** to move to the next task (Fig. 172).

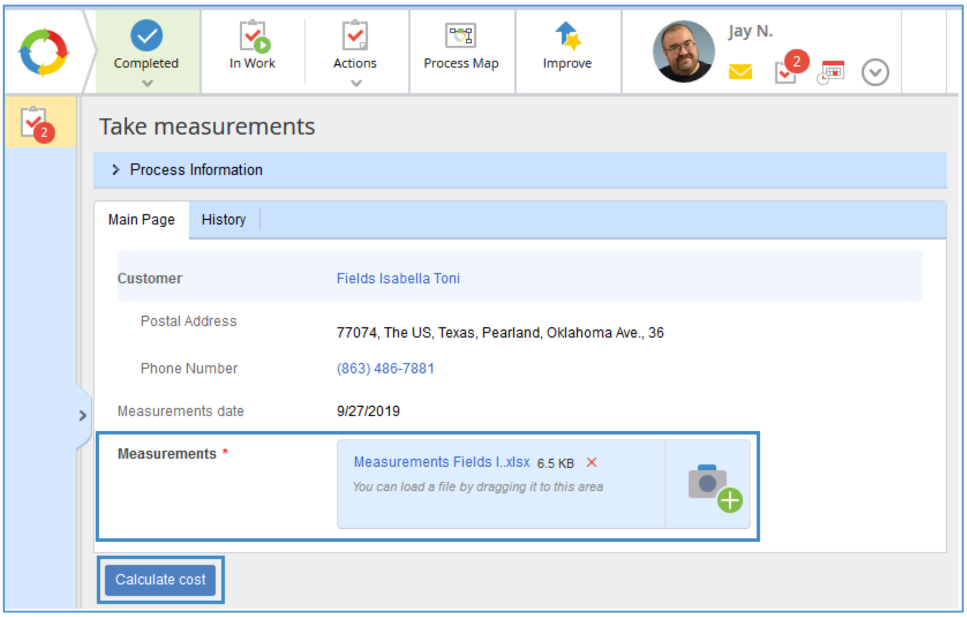


Fig. 172. Take measurements task in the execute order business process

When the designer receives the third task 'Calculate cost', she will see the measurements that the installer has taken, as well as the fields to attach the project design and cost estimate, and to specify the initial cost of the order after it's been designed. Fill in the required fields and click **Send to the sales rep** (Fig. 173).

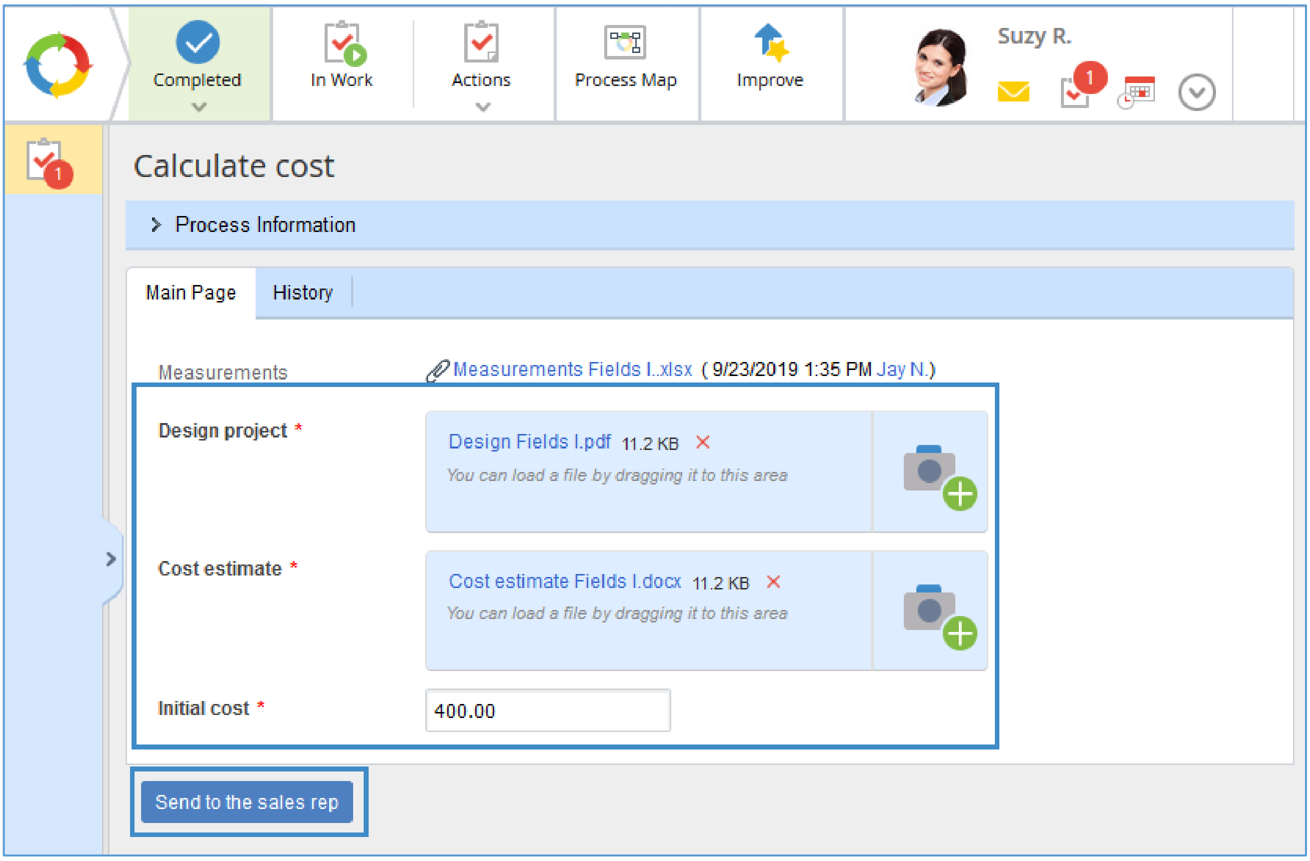


Fig. 173. Calculate cost task in the execute order business process

Next, the sales rep gets the fourth task 'Quote the price' (Fig. 174). On the task page, he/she will see the customer data and read the estimate. The sales rep has to phone the customer and quote the preliminary price. If they agree on the terms, the sales rep clicks **Sign contract**, after which a contract is automatically generated from the template. If the customer, for some reason, refuses the company services, hit the **Client refused** button and the process will stop.

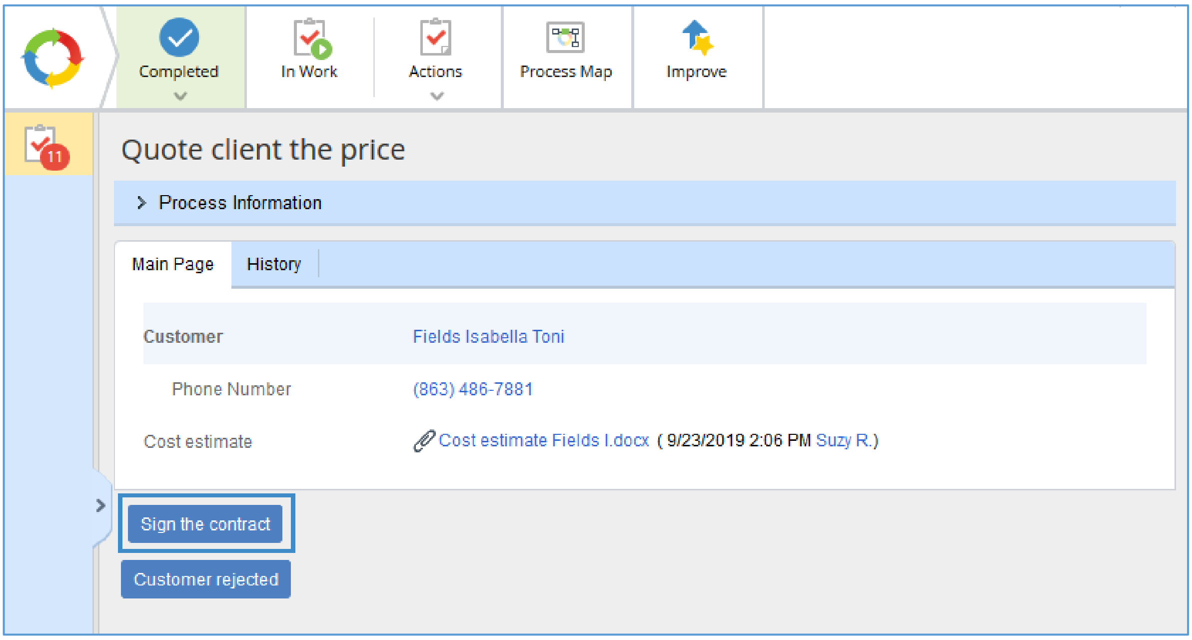


Fig. 174. Quote client the price task in the execute order business process

The fifth task 'Sign the contract' is also assigned to the sales rep. It displays information about the customer, the estimate, and the agreement generated from the template. The sales rep prints it out, agrees with the customer on the installation date and time, and accepts payment for the order (Fig. 175). Then he or she clicks **Signed** to send the order to production.

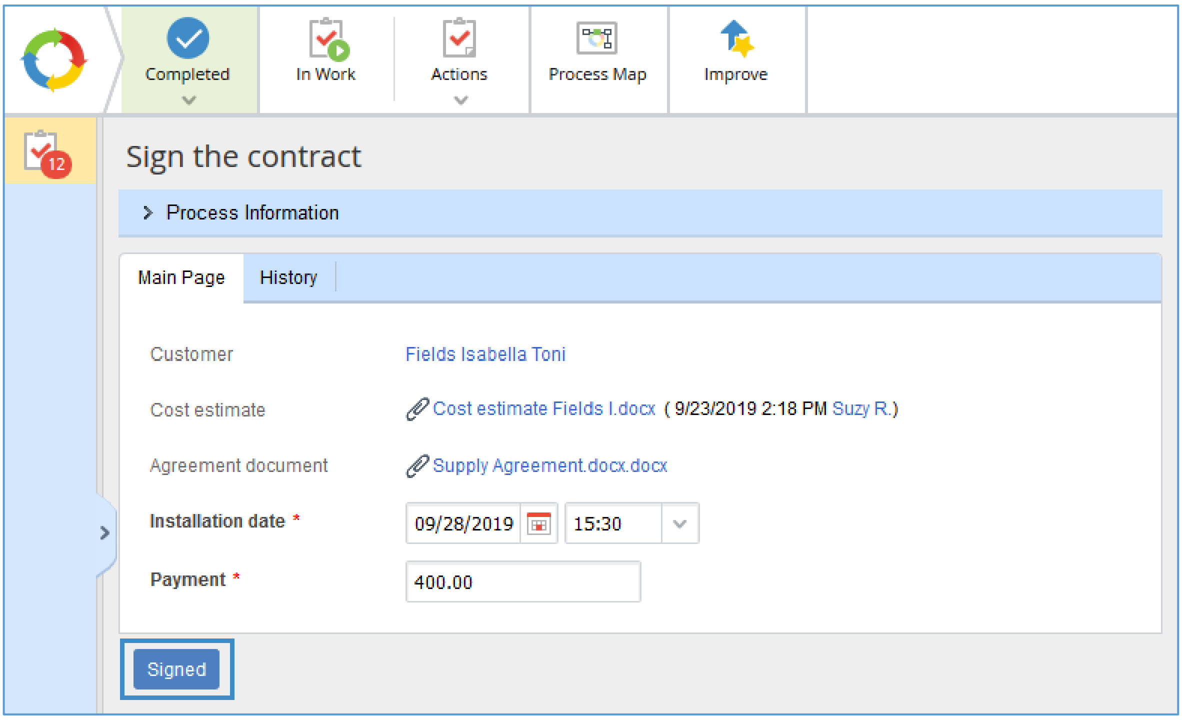


Fig. 175. Sign the contract task in the execute order business process

At the current stage of the process, two different tasks are simultaneously assigned to two users (Fig. 176). This is how a gateway works: it runs a process along several routes at once (see Section 4.2.3).

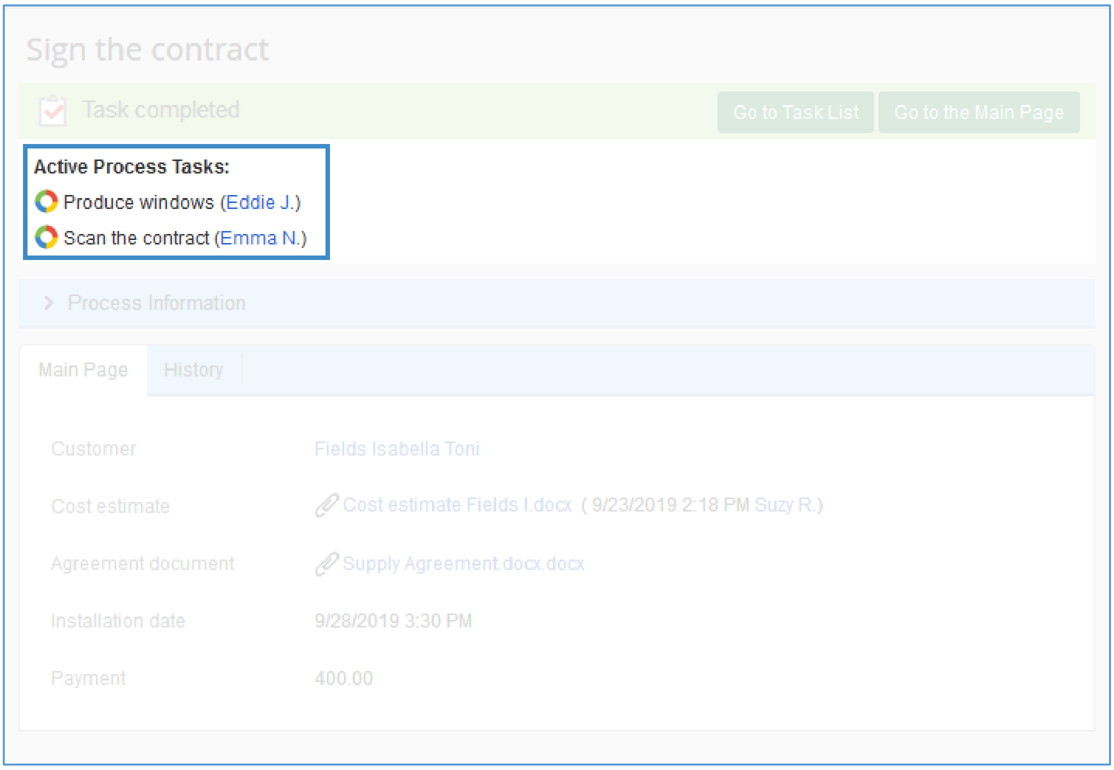


Fig. 176. Process tasks sent to two users with the help of a parallel gateway

To do the fifth task 'Scan the contract', log into the system as the secretary. Scan the document that was signed in the previous step and attach it to the required field. Once the task is completed, click **Scanned** (Fig. 177).

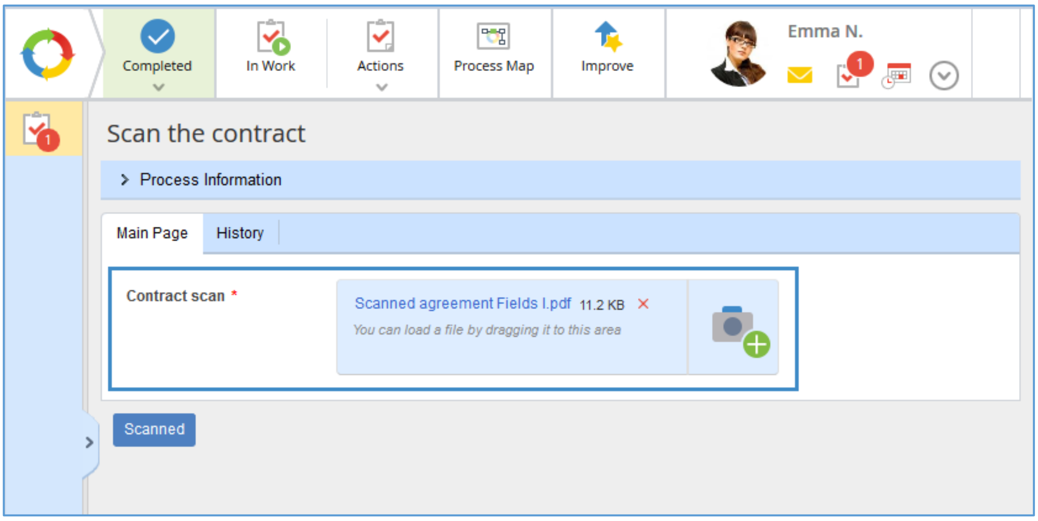


Fig. 177. Scan the contract in the execute order business process

The sixth task is 'Produce windows' in the Production Head's swimlane. It's more of a notification rather than a task. On the form, you will see the files attached earlier: measurements and project design as well as the installation date. Once the windows are produced, the head of the department clicks the corresponding button (Fig. 178).

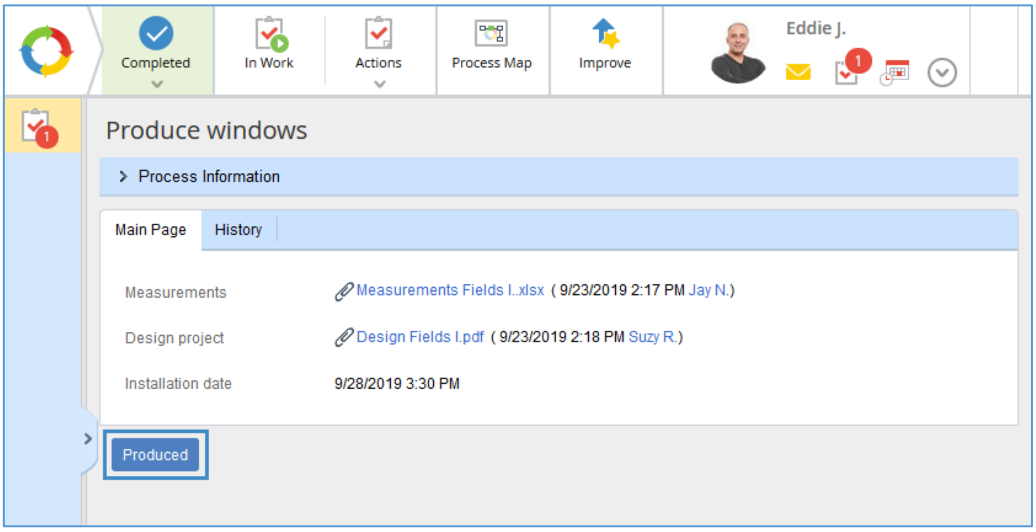


Fig. 178. Produce windows in the execute order business process

The executor of the next task 'Install windows' is the installer. On the task form, he or she will see the customer's name, installation address and date. When the windows are installed, he or she will just fill in the completion form and attach it to the required field (Fig. 179). Read this Help section to find out more about the formats that you can upload to ELMA. Finally, click **Installed** to finish the business process.

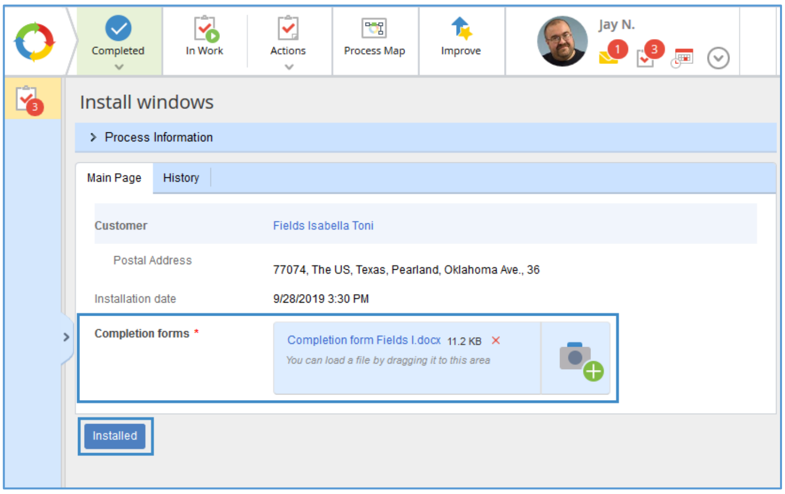


Fig. 179. Install windows in the execute order business process

At any stage of the process, users can expand the **Process Information** panel and find out more about the process instance by clicking the corresponding link (Fig. 180).

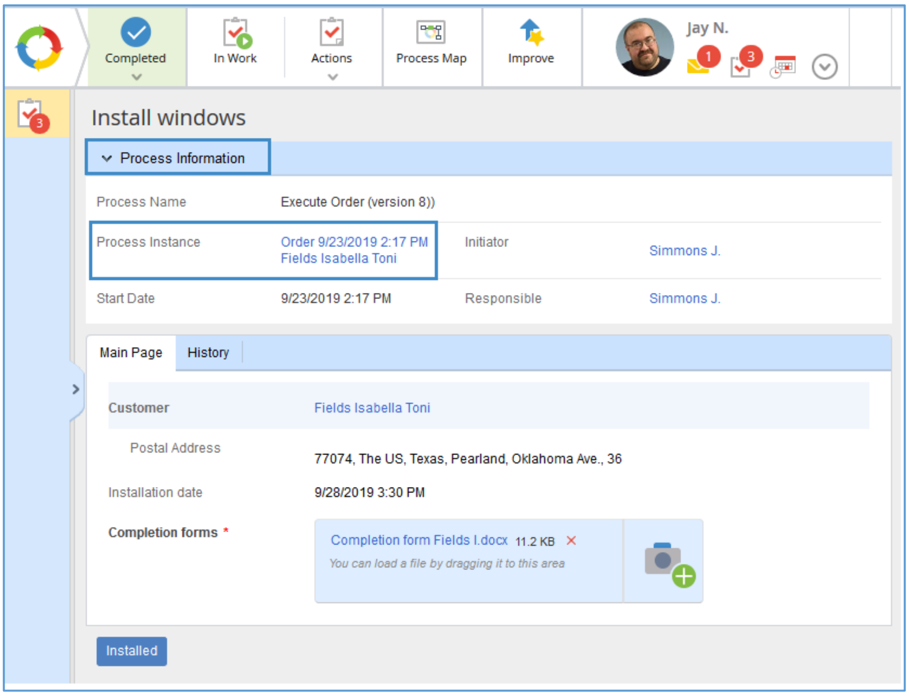
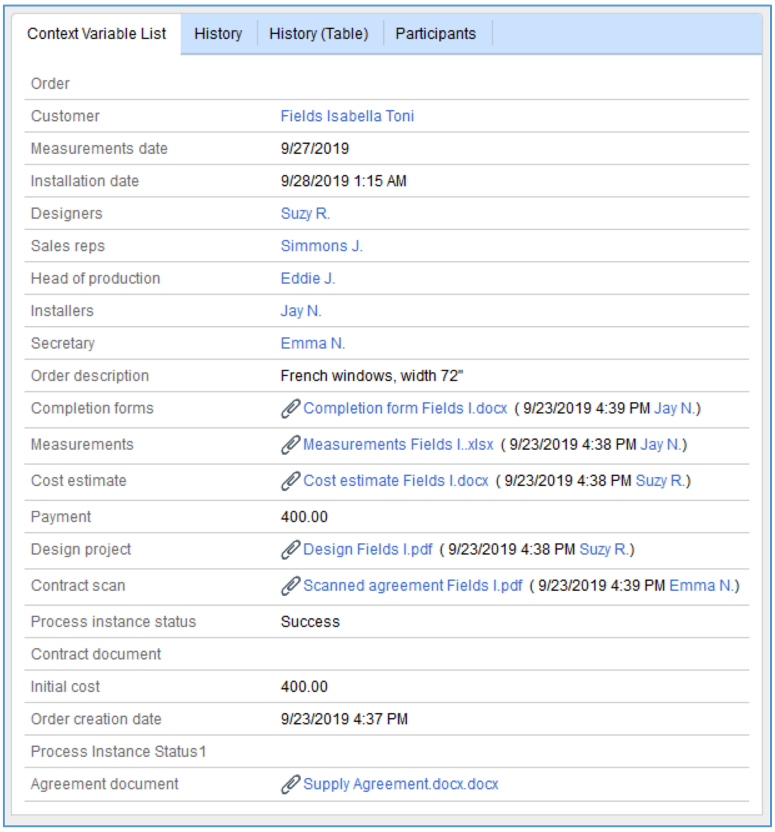


Fig. 1800. Opening the process instance

Once you've opened the process instance, you can see the list of all context variables (Fig. 181) such as the contractor page, task executors and attached files.



Context Variable List | History | History (Table) | Participants

Order	
Customer	Fields Isabella Toni
Measurements date	9/27/2019
Installation date	9/28/2019 1:15 AM
Designers	Suzy R.
Sales reps	Simmons J.
Head of production	Eddie J.
Installers	Jay N.
Secretary	Emma N.
Order description	French windows, width 72"
Completion forms	Completion form Fields I.docx (9/23/2019 4:39 PM Jay N.)
Measurements	Measurements Fields I..xlsx (9/23/2019 4:38 PM Jay N.)
Cost estimate	Cost estimate Fields I.docx (9/23/2019 4:38 PM Suzy R.)
Payment	400.00
Design project	Design Fields I.pdf (9/23/2019 4:38 PM Suzy R.)
Contract scan	Scanned agreement Fields I.pdf (9/23/2019 4:39 PM Emma N.)
Process instance status	Success
Contract document	
Initial cost	400.00
Order creation date	9/23/2019 4:37 PM
Process Instance Status1	
Agreement document	Supply Agreement.docx.docx

Fig. 181. List of variables in the execute order business process

Chapter 5. Long-cycle Sales

Among other things, **ELMA CRM+** allows you to work with long-cycle sales. A long-cycle sales process involves long-term work with customers, strict control over the course of a deal and a comprehensive product portfolio or a set of services.

The sales process is a journey for a prospect. Typically, it has several stages and results in a closed deal or a failure.

The main tool for managing long-cycle sales is the **Sales Funnel**. ELMA allows you to create the so-called active sales funnel. The difference between an active funnel and a regular one is that when a deal is moving from one stage to another, a business process starts. You can implement any business logic in such processes. For example, a process can check whether the deal/contractor page contains all necessary information, or it can send some documents for approval. In other words, the deal can move to the next stage only if certain conditions are met. You can read about how to set up an active sales funnel in Section 5.3.

Active sales funnel processes usually focus on:

- getting and storing full information about a deal;
- managing a deal;
- engaging employees from other departments in working with the deal;
- making a deal, controlling if there are original documents and so on.

Long-cycle sales often involve a large number of employees. This means that you need to properly configure access permissions to deals and other CRM objects. Configuring permissions to CRM objects is discussed in Section 5.2.

Apart from sales funnels, the following tools are used in **ELMA CRM+** to control and analyze deals: **Deals Dynamics** report, flexible and customizable filters for deals, contractors and leads, and a tool for tracking planned and received payments.

In long-cycle sales, you start working with customers even before they decide to use your company services or purchase your product: at this stage they are considered leads. You can attract them in different ways: for example, by making phone calls, or leaving a feedback form on your website. It’s crucial to entice prosper customers, be aware of their needs, provide them with all the information of interest, call them back and respond to their letters. To work with potential customers in **ELMA CRM+**, go to the **CRM** section – **Leads**. You can also schedule **Relationships** in the calendar.

Now let’s explore the basic settings and options of the **ELMA CRM+ application** that allow organizing long-cycle sales. As an example, let’s take a large company that supplies and installs electric equipment. This is the company’s org chart (Fig. 182):

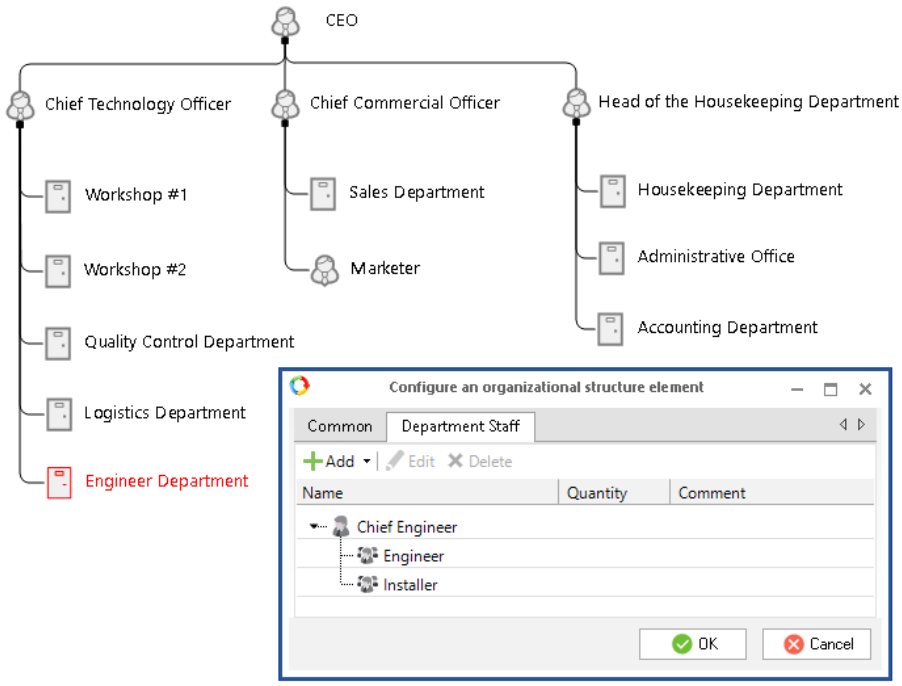


Fig. 182. Org chart of the demo configuration

There are 30 department members and each employee makes sales in a certain geographical region of the country: New York, Northeast, Southeast, Southwest, Midwest, West, Other Regions. While conducting the deal, the sales representatives engage the company's technical and logistics specialists.

The 'sell equipment' workflow is as follows:

1. Initial contact – the potential customer is interested in the product; the sales representative clarifies his/her needs.
2. Sales proposal – employees actively work with the customer and consult him/her, pick out necessary equipment with required technical characteristics, prepare and approve the sales proposal, and send it to the client.
3. Signing the supply agreement – the customer enters into a contract with the company, and if necessary, signs the installation contract.
4. Receiving payment/prepayment under the terms of the contract.
5. Ordering the equipment from partner companies.
6. Shipping the equipment to the buyer, if necessary, installing the equipment.
7. The customer pays in full for the goods/services.
8. Getting and signing the documents required for closing the deal.

5.1. Potential Customers (Leads)

A long-cycle sale process starts with processing information about a potential customer (lead). To manage prospects in **ELMA CRM+**, go to **CRM** – **Leads** (Fig. 183).

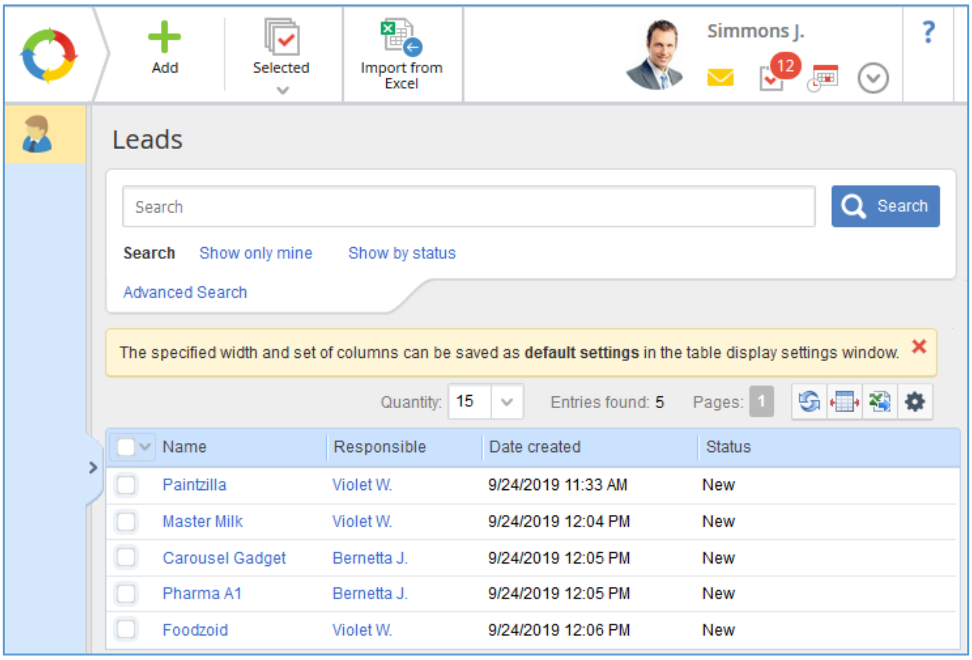


Fig. 183. CRM section – Leads

In Section 3.1, you can read how to create/edit a contractor page. In the same way, create several **Leads** (Fig. 183) with the following parameters:

Table 3. Data for creating leads

Name	Region Group	Industry	Responsible
Paintzilla	New York	Paints and varnishes	Violet Wyatt
Master Milk	West	Dairy farming	Violet Wyatt
Carousel Gadget	Northeast	Retail	Johnnie Bernetta
Pharma A1	Southwest	Pharmaceuticals	Johnnie Bernetta
Foodzoid	Midwest	Retail	Violet Wyatt

The **Leads** section is used to collect initial data such requests form the website, business cards from exhibitions, external bases of potential customers and others.

The **Leads** section helps to keep the **Deals** and **Contractors** bases neat and clean. If a potential customer decides to buy goods or services, he/she will be automatically converted into a **Contractor**. The contractor page will save all the information that was available on the lead page. But if a lead doesn't buy anything, he/she remains in the **Leads** section. You can also import lists of leads from MS Excel into ELMA. For more details on importing potential customers into ELMA, refer to Section 9.1.

This is how you should work with leads:

- Create a page and fill it in with initial data. **Leads** can be created by company employees and can also be imported from a third party source;
- Distribute leads among the sales department employees if leads come from external sources. As a rule, the department head is responsible for distributing leads;
- Work with the lead: arrange meetings, make calls, and send letters. Identify your potential customers' needs and decide what the next step will be;
- If successful, convert the **Lead** into a **Contractor** and create a **Deal.** If not successful, set the **Unqualified (failure)** status. After that, you either continue working with deals and contractors, or close the relationship.

In Fig. 184, you can see a **Lead** page.

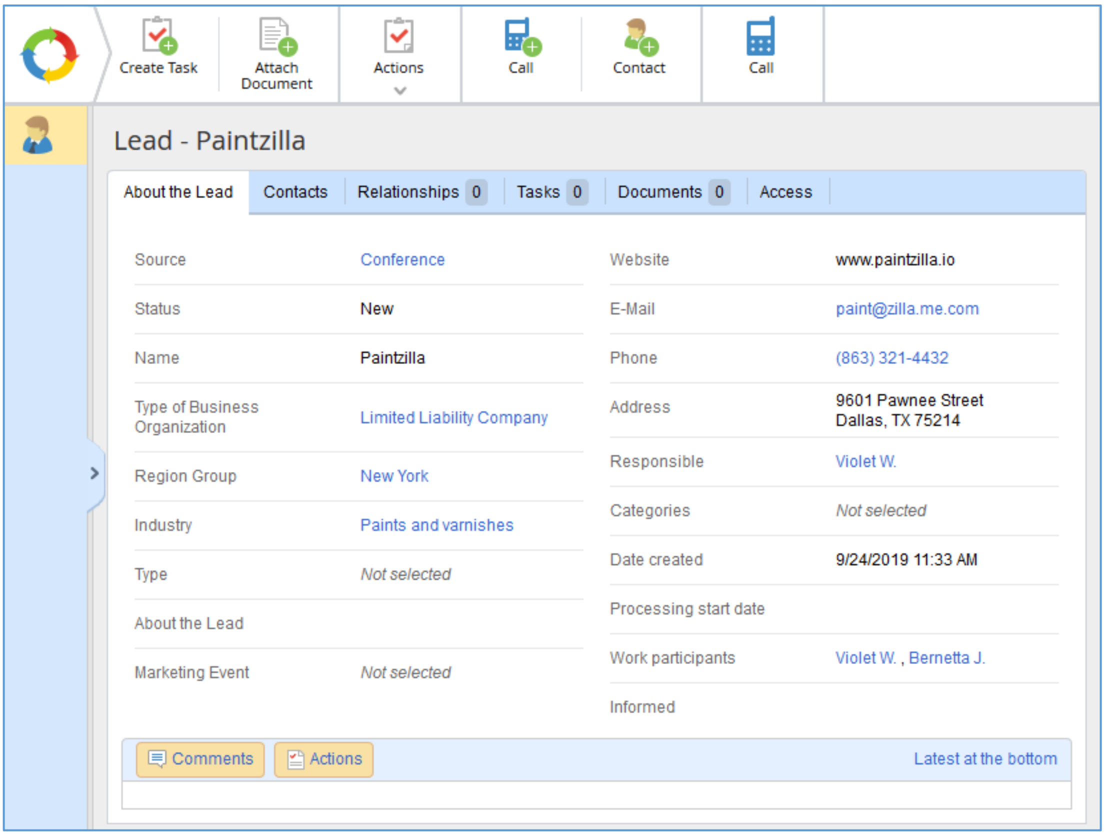


Fig. 184. Lead page

Work with a potential customer in the web applications and in the ELMA Designer in the same way as you work with a **Contractor**. A lead page also has a set of properties on different tabs. You can add comments, create tasks, calls, meetings, letters, attach documents, create contacts and more. You can also customize a lead page with additional properties in the ELMA Designer.

You might want to use these additional objects while working with **Leads**:

- **Source** – a list of information sources from which a lead found out about your company (website, TV commercial and so on);
- **Lead Type** – identify the type of a lead based on one or another principle.

On a **Lead** page, click **Actions** to choose an action you want to perform or change the lead status (Fig. 185):

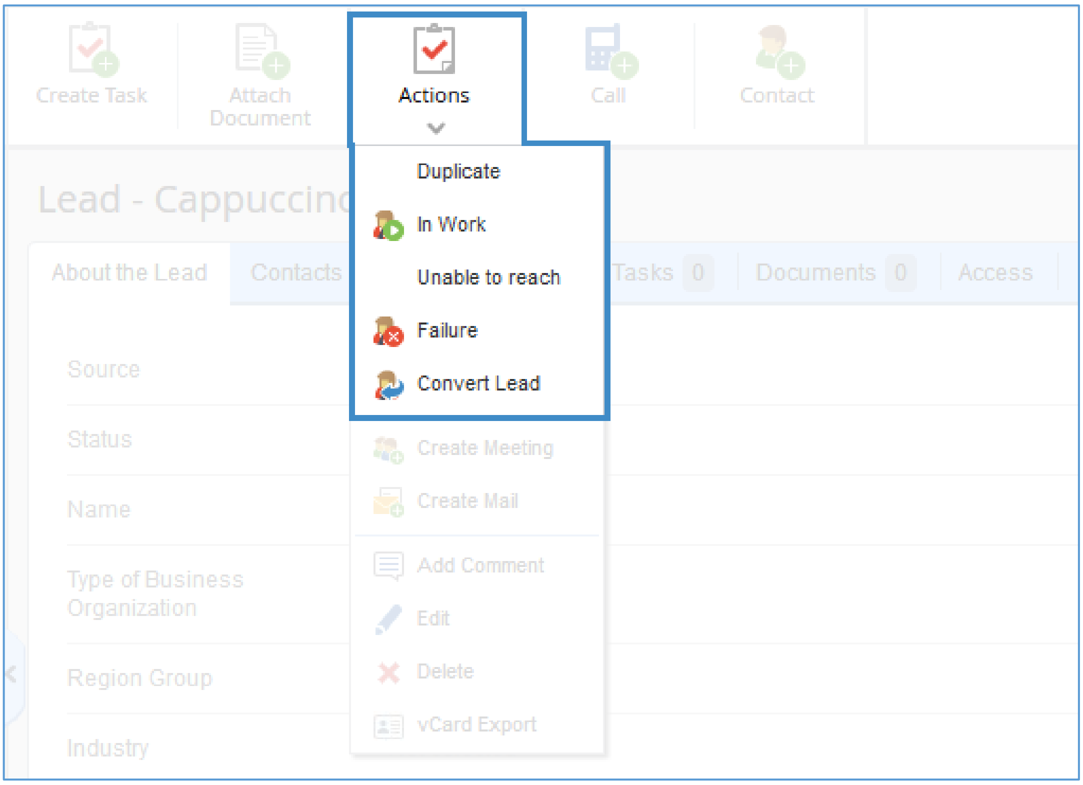


Fig. 185. Actions button on a lead page

Let's take a closer look at the statuses that a **Lead** can have.

Use the **Duplicate** status if there is another **Lead** or **Contractor** with such data in the system. One object can have multiple duplicates. When you select this status, object pages do not merge. Find out more about how to work with duplicates in Section 5.1.1.

By default, the **In Work** status is assigned automatically after the first relationship with a lead is added. However, you can change this setting in ***Administration – System Settings – CRM***.

The **Unable to reach** status is used when your employee did not manage to contact the prosper customer and further work with this lead is currently not possible.

Qualified means that a **Potential customer** was converted into a contractor.

Click **Failure** to set the **Unqualified** status. The potential customer remains in the list of leads, but the only actions you can do on the lead page are **Activate** and **Delete** it.

The actions button allows not only changing **Lead** statuses, but also converting leads. When you **Convert a Lead**, a contractor, contact, deal or relationship is added based on the potential customer attributes. After the conversion, the **Lead** remains in the lead list, but acquires the **Qualified** status, after which you continue working in the created object. A qualified lead can only be deleted with the special access permissions.

Different statuses can help you analyze how efficiently the sales department employees work and where leads come from.

In ELMA, there is a special portlet – **Leads** – that allows working with prosper customers. Learn more on how to add portlets in Section 3.5.2. In Fig. 186 you can see an example of the **Leads** portlet.

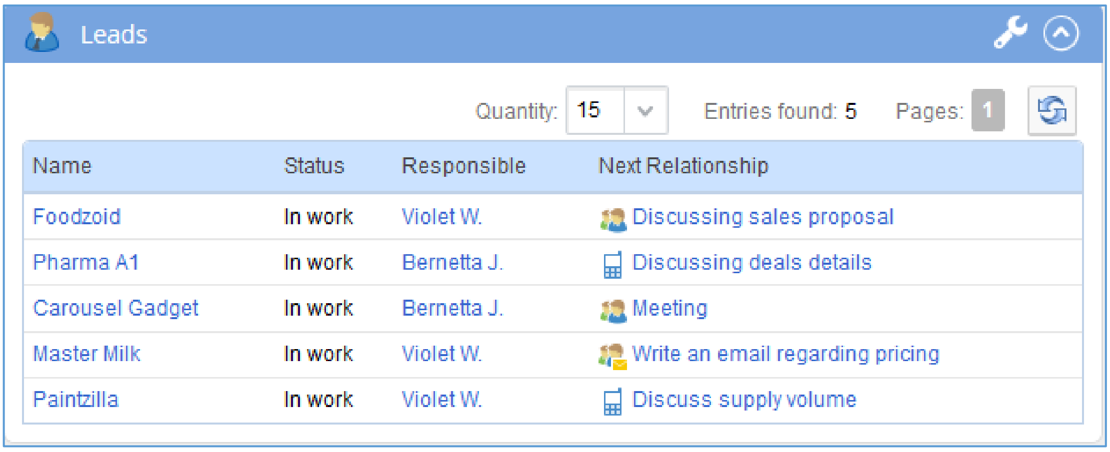


Fig. 186. Leads portlet

You can add this portlet onto your sales reps' main pages so that they can quickly access their leads.

Read further to find out how to create lead pages, work with leads and configure access permissions to CRM objects.

5.1.1. Working with Duplicates

Sometimes potential customers might fill out the form on the website more than once. As a result, the **Lead** section gets cluttered up with identical pages. To avoid this, you can assign the **Duplicate** status to duplicate objects.

When you mark a lead as a **Duplicate**, you can select a **Contractor**, **Lead** or **Deal** which is a duplicate of the chosen lead (Fig. 188).

To assign the **Duplicate** status manually, click **Actions – Duplicate** on a lead page (Fig. 187).

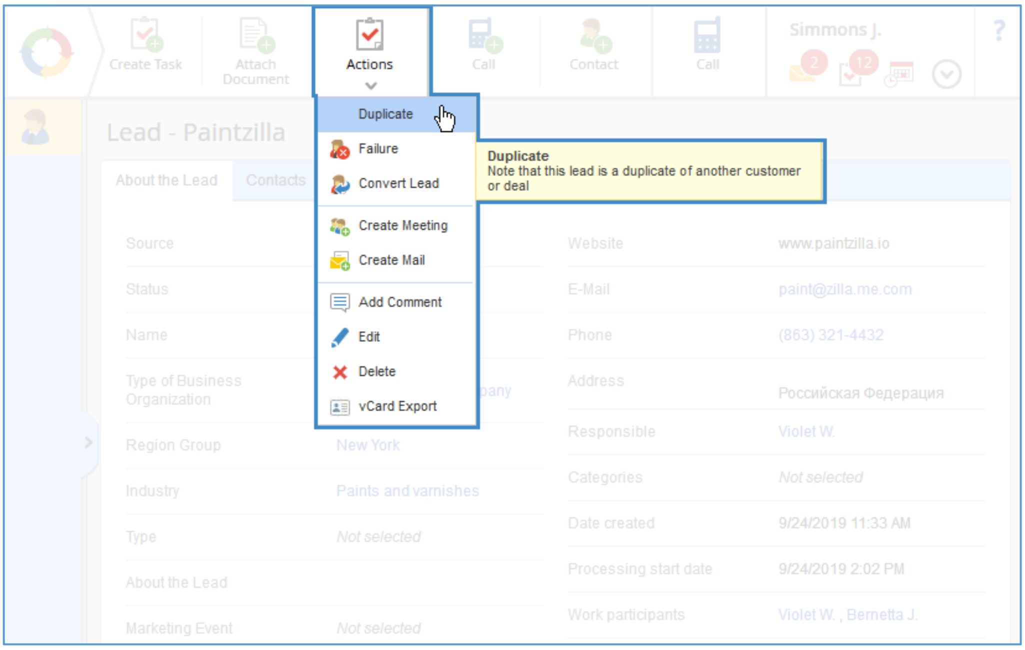


Fig. 187. Duplicate statuses button

In the left drop-down list (Fig. 188) of the **Duplicate** dialog box, select the object type to which this lead will be bound to. This time, create a duplicate of the existing **Lead.**

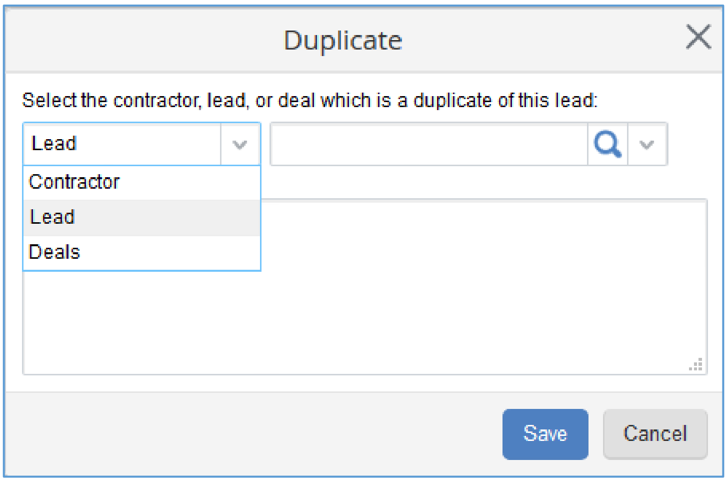


Fig. 188. Create a lead duplicate window

In the right drop-down list (Fig. 189), select the name of a lead. If necessary, enter a comment.

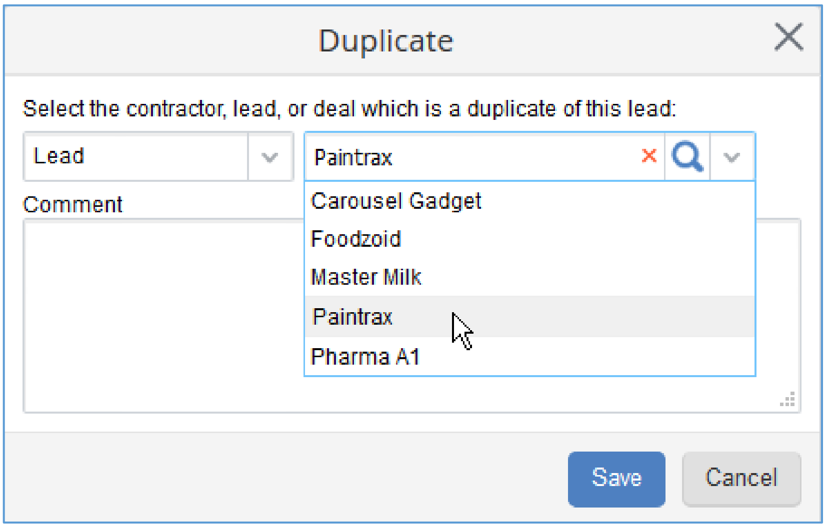


Fig. 189. Selecting a lead which the new lead will duplicate

Once you've clicked the **Save** button, the object will acquire the **Duplicate** status (Fig. 190).

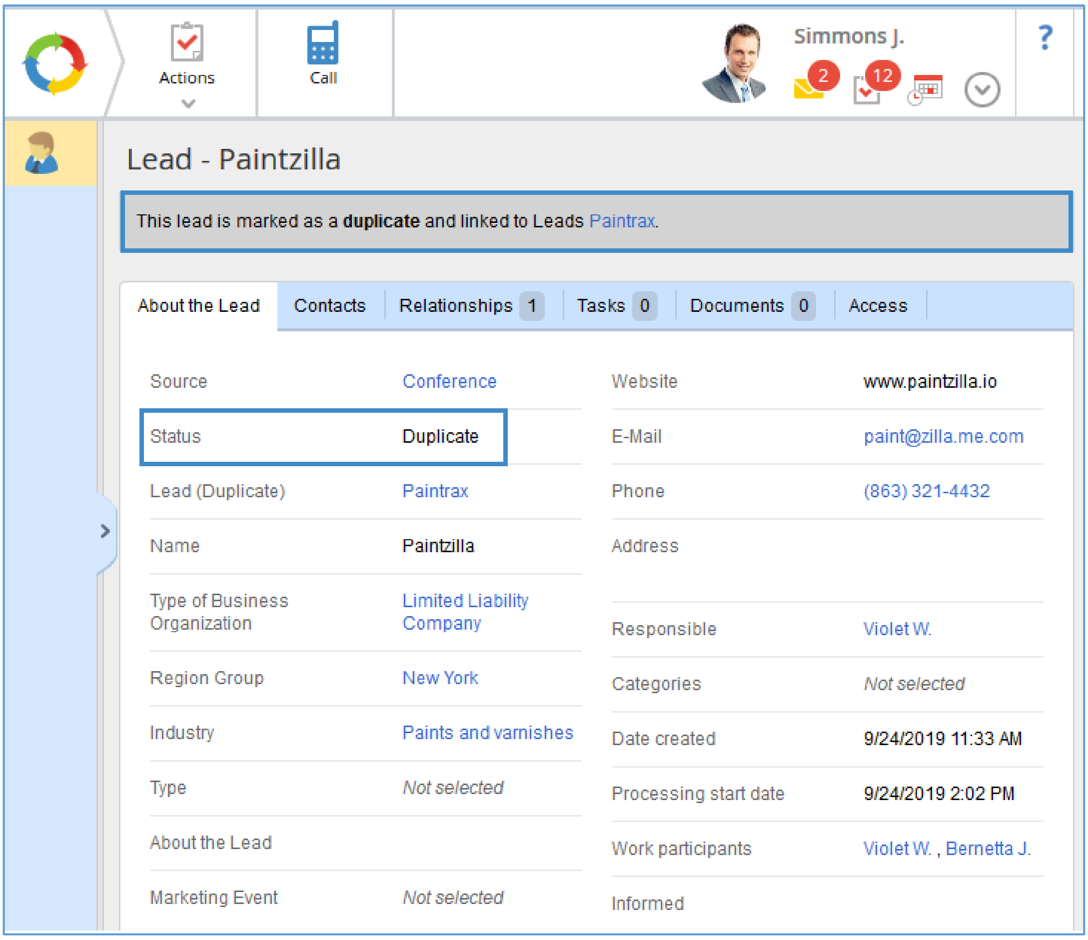


Fig. 190. Lead duplicate page

Moreover, ELMA allows for automatic lead duplicates recognition. To recognize duplicates, use the scoring table (Fig. 193). You can set the required parameters in ***Administration – CRM Settings – Duplicates scoring table.***

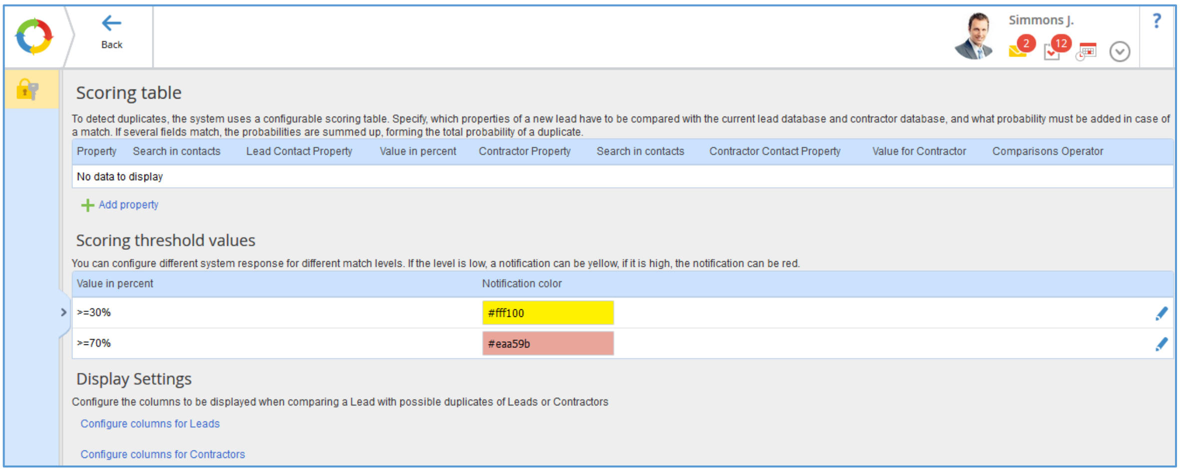


Fig. 191. Duplicates scoring table settings page

The settings page features a panel with a scoring table, a panel with scoring threshold values, as well as a display settings area.

In this table, you can specify the lead properties which will be used to check for duplicates in the database of contractors, leads and deals. By default, this table is empty and there is no data to display on the panel (Fig. 191).

To add an item to the table, click **Add property** under the scoring table. A page will open (Fig. 192) on which you need to fill in the required fields and click **Save.**

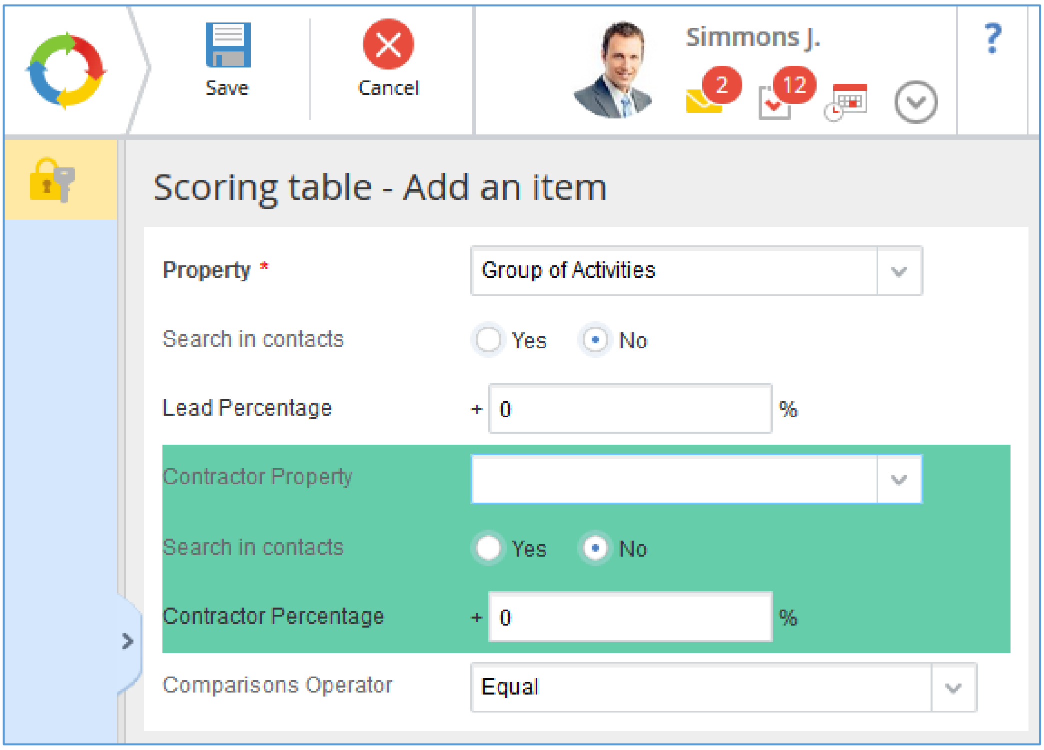


Fig. 192. Adding an item to the scoring table

Below you can find the values entered into the table.

Property – a property of the created **Lead,** which must be compared with the same property of existing **Leads** and/or **Contractors.** This field is required.

Search in contacts:

- **Yes –** search for matches in contacts using a selected property;
- **No –** do not search for matches in contacts using a selected property.

Lead contact property – a property of the created lead, which must be compared with the similar contact property of existing, leads. This field is displayed only if in the **Search in contacts** field the switch is set to **Yes.**

Lead Percentage – a numerical value (weight), which is added to the total percentage of probability when the specified fields coincide with existing fields of leads.

Contractor property – existing **Contractors** property, which must be compared with the property of the lead being created that was specified in the **Property** field.

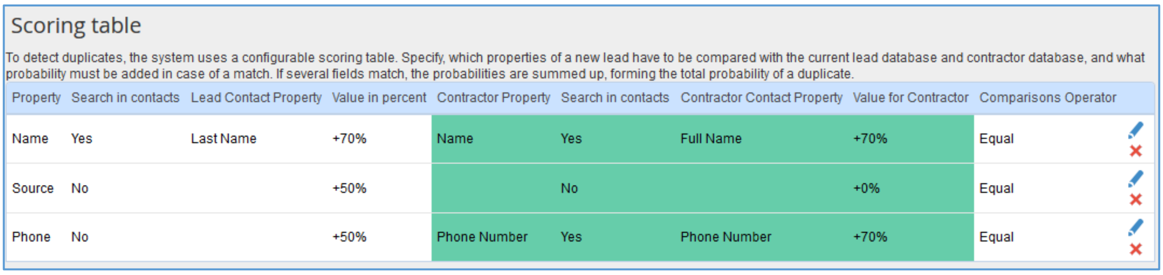
Search in contractor contacts:

- **Yes** – search for matches in contractor contacts using a selected property;
- **No** – do not search for matches in contractor contacts using a selected property.

Contractor contact property – a contact property of existing **Contractors** which must be compared with the similar contact property of the lead being created. This field is displayed only if the switch is set to **Yes** in the **Search in contractor contacts** field.

Contractor Percentage – a numerical value (weight), which is added to the total percentage of probability when the specified fields coincide with existing fields of contractors.

Comparison operator – from the drop-down list, select the required comparison operator – **Equals –** which will search the system for a complete match using the selected properties.


Scoring table

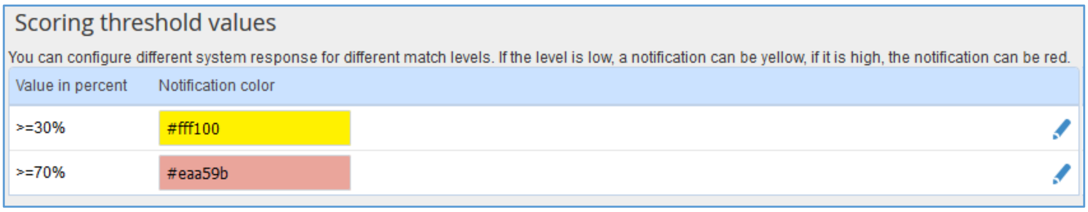
To detect duplicates, the system uses a configurable scoring table. Specify, which properties of a new lead have to be compared with the current lead database and contractor database, and what probability must be added in case of a match. If several fields match, the probabilities are summed up, forming the total probability of a duplicate.

Property	Search in contacts	Lead Contact Property	Value in percent	Contractor Property	Search in contacts	Contractor Contact Property	Value for Contractor	Comparisons Operator
Name	Yes	Last Name	+70%	Name	Yes	Full Name	+70%	Equal
Source	No		+50%		No		+0%	Equal
Phone	No		+50%	Phone Number	Yes	Phone Number	+70%	Equal

Fig. 193. Example of a filled scoring table

Click the icon to the right of the required item in order to edit it. To delete an item, click .

Among other things, you can configure **Scoring Threshold Values**. For them, you can configure notification colors. They will depend on the match level of the **Lead**. By default, this table contains two items (Fig. 194).


Scoring threshold values

You can configure different system response for different match levels. If the level is low, a notification can be yellow, if it is high, the notification can be red.

Value in percent	Notification color
>=30%	#fff100
>=70%	#eaa59b

Fig. 194. Scoring threshold values

First, click on the right to edit an item, then a page (Fig. 195) will open where you can enter the required changes and **Save** them.

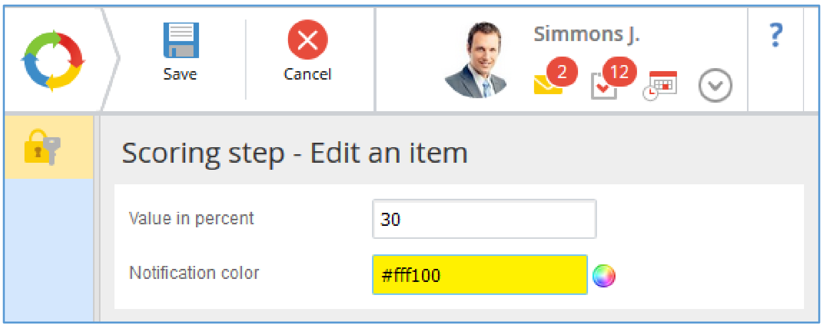


Fig. 195. Scoring step – edit an item page

The **Value in percent** field indicates the match level (expressed in a numerical value) of a contractor and the **Lead** being created. If the specified match level is reached, you will see a notification.

Notification color – color of the notification. You can also use the icon to select a color.

In the **Display Settings** section (Fig. 196), you can configure the columns for the **Leads** and **Contractors** that should be displayed when creating scoring table items.

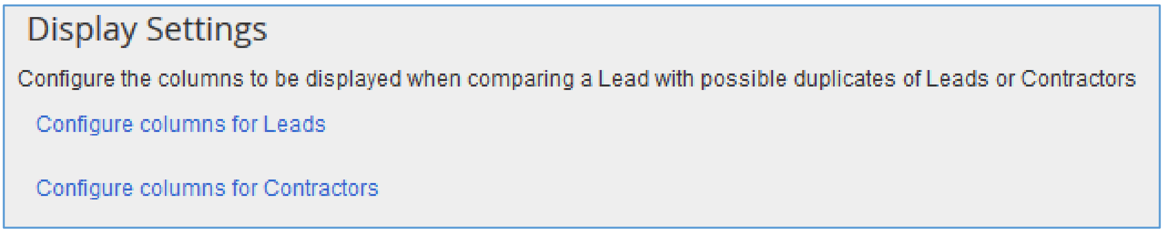


Fig. 196. Display settings unit

Click on one of the links to configure the **Table display settings** (Fig. 197).

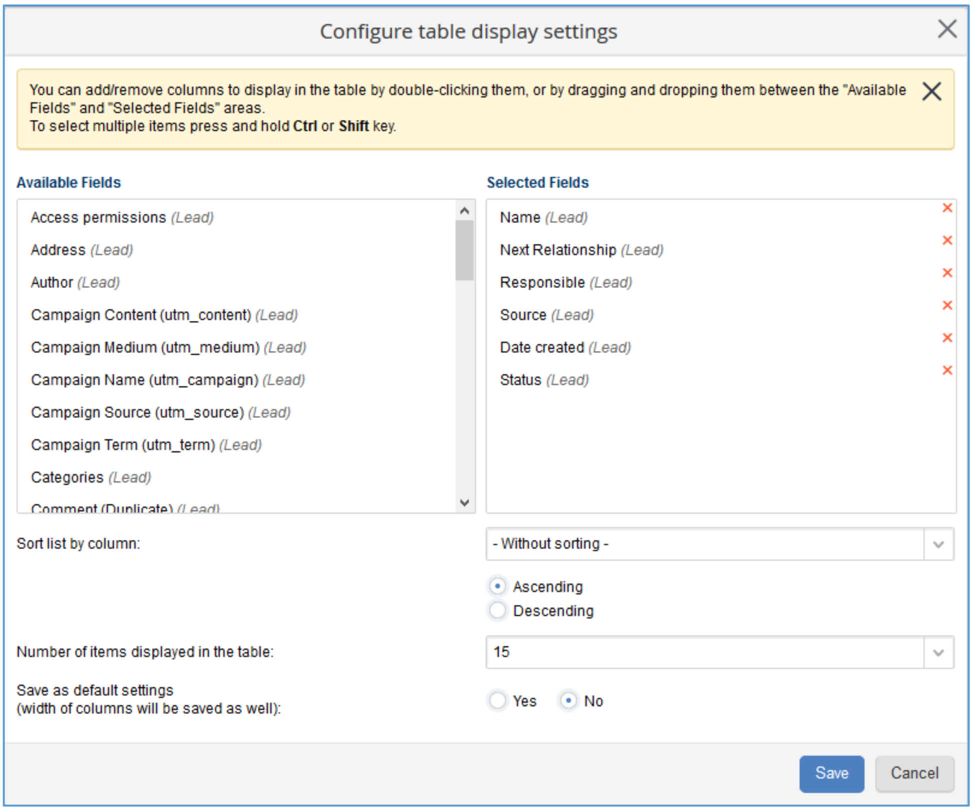


Fig. 197. Table display settings dialog box

Read this Help article to find out more about configuring the way tables are displayed.

When creating a new lead whose parameters are the same as the parameters of objects already existing in ELMA (**Contractor**, **Lead**, **Deal**), the system will notify the user about a possible duplicate of the object (Fig. 198)

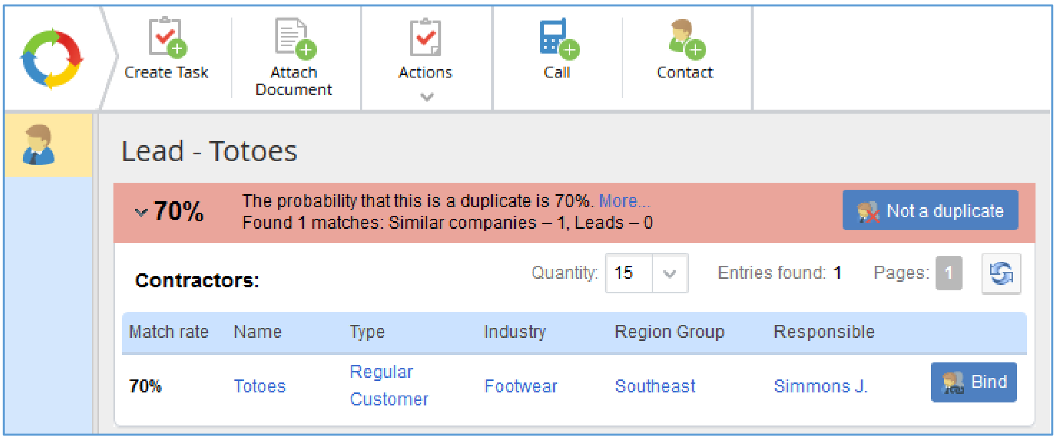


Fig. 198. Notification that a lead might have a duplicate in the system

If the newly created lead is really a duplicate, click the **Bind** button. A warning window will open (Fig.). If you click **Yes** in it, the duplicate of the existing lead will be created. On this lead page, you will see the **Duplicate** status.

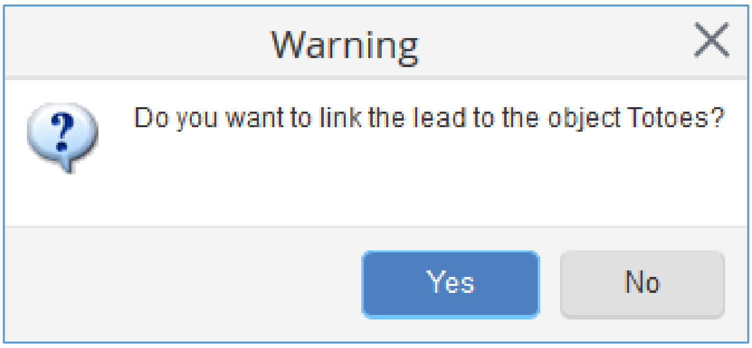


Fig. 199. Warning

If you click the **Not a duplicate** button, another warning window will open (Fig. 199). Click **Yes** in it to add a new lead in the system.

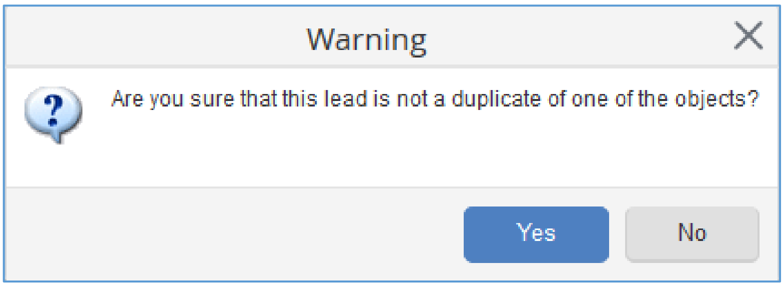


Fig. 199. Warning

5.2. Access Permissions

A CRM system, among other things, aims at differentiating access to various system objects. In long-cycle sales, you often need to give access to the information stored on a **Contractor** or **Deal** page only to a limited list of users. For this purpose, **ELMA CRM+** has different access settings that can be grouped in the following way:

- General access to the CRM section (view, create and edit **CRM** objects);
- Access to the fields and properties of CRM objects (view and edit specific object properties);
- Access to certain **Contractor** categories (categorize your contractors and configure access to these groups).

You can configure all of these access settings in ***Administration – CRM Settings***.

In the company described at the beginning of this chapter, apart from sales representatives, there are other employees who take part in making deals go through: technical specialists, logisticians and management members. They all need granular (but nor full) access to contractor and deal pages. Let's take a look at how to use **Categories** to differentiate access to customers from different regions.

As an example, let's create the following groups: **Managers, Technical Specialists, Sales New York, Sales Northeast, Sales Southeast, Sales Southwest, Sales Midwest, Sales West**. To do so, go to ***Administration – Users – Groups.***

Now that you have created the necessary access groups, add your users and org chart elements to them. Read Section 3.5.1 that describes the basic principle of creating user groups. For more information, read this Help page.

Fig. 200 shows the list of created user groups.

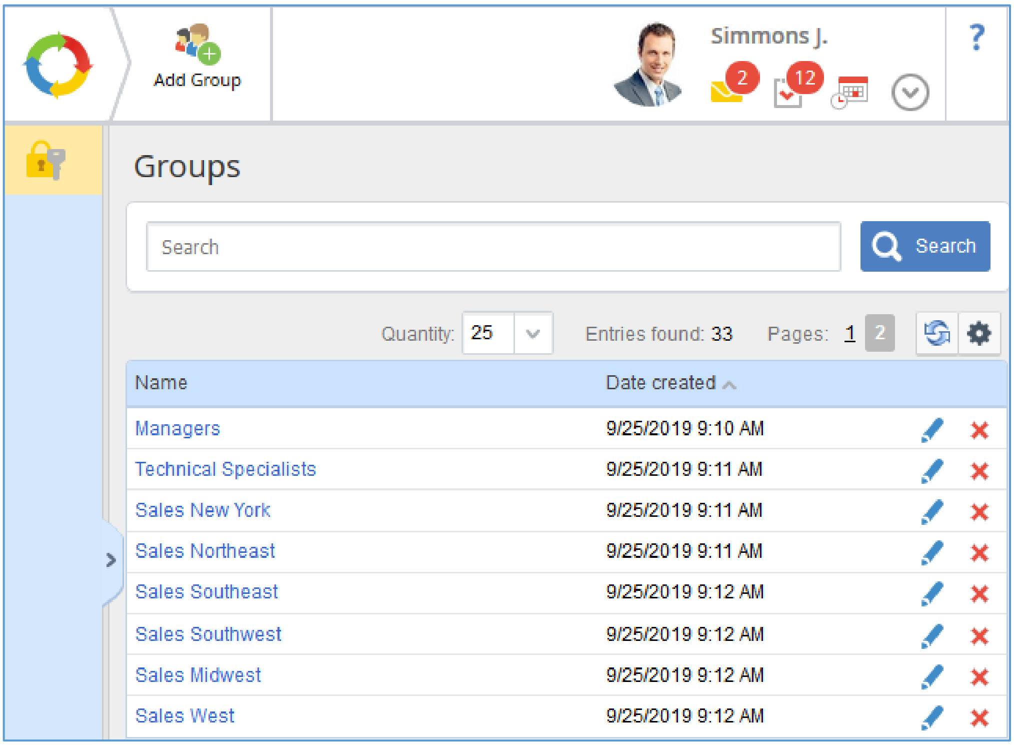


Fig. 200. Administration – Users – Groups

5.2.1. Configuring CRM Access Permissions

The system administrator can configure general access permissions to various CRM sections in ***Administration – CRM Settings – Access Permissions*** (Fig. 201).

This section allows configuring access permissions at a granular level to the CRM app and its subsections. By default, users in the **All Users** group have almost full access to the **CRM** section. But if necessary, you can restrict it: for example, give permissions only to the sales department and managers.

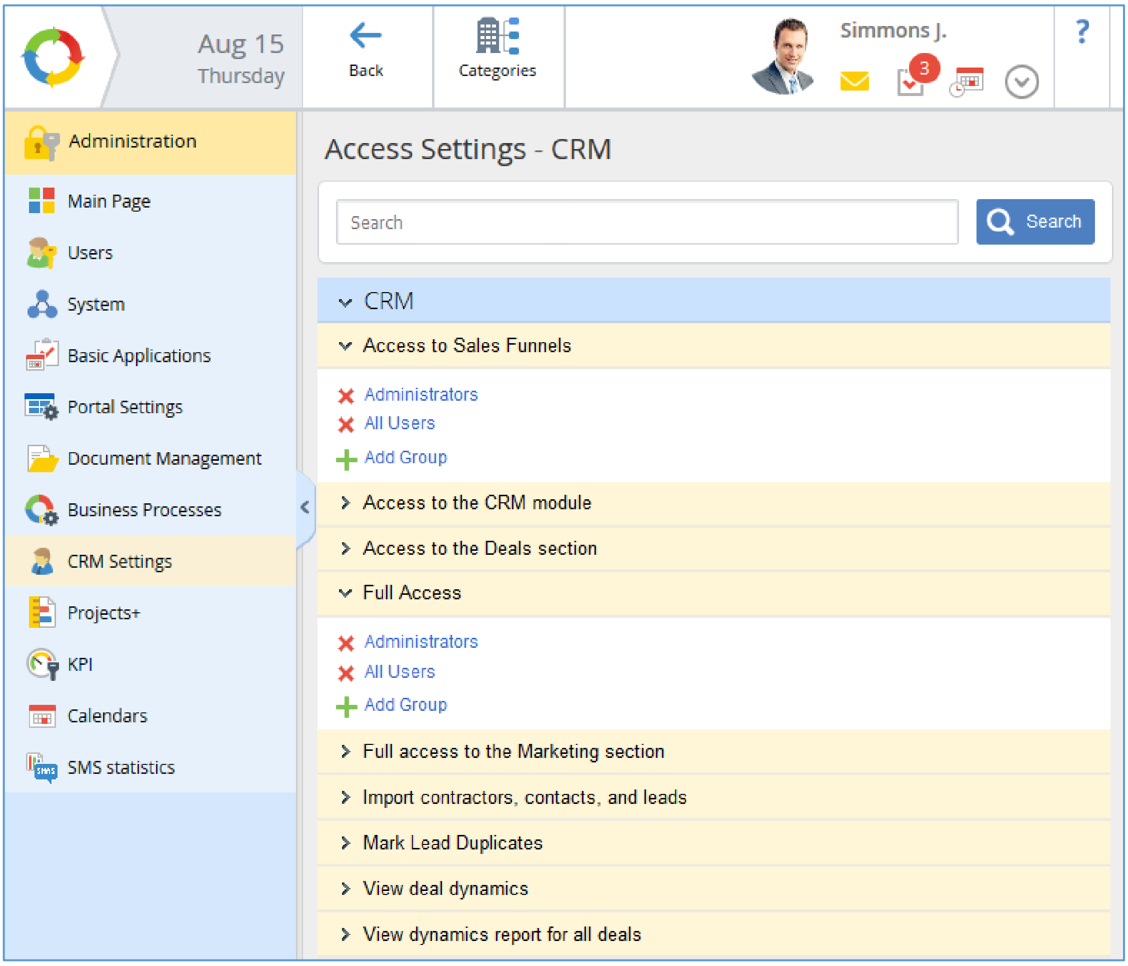


Fig. 201. Administration – CRM Settings – Access Permissions

Now let's configure the general access permissions:

- **All Users – Access to the CRM module;**
- **Managers – Full Access;**
- **Technical Specialists – Access to the Deals section** and **Create Contact;**
- All **Sales Department** groups – **Access to Sales Funnels, Access to the Payments section, Access to the Deals section, View deal dynamics, Create Lead, Create Contact, Create Deal, Create 'Individual',** and **Create 'Company'.**

5.2.2. Access to Contractor, Lead and Deal Pages

In ELMA, you can not only configure access to various CRM subsections, but also grant permissions to specific contractor, lead or deal pages. While working with these CRM objects, access permissions can change.

These objects have a separate **Access** tab in them (Fig. 202). It features the following permissions:

- Permissions inherited from categories:
  - **Leads** and **Contractors** inherit permissions from **Categories** (See Section 5.2.3);
  - **Deals** inherit permission from **Contractors**;
- Extra Permissions – each instance gets these default permissions.

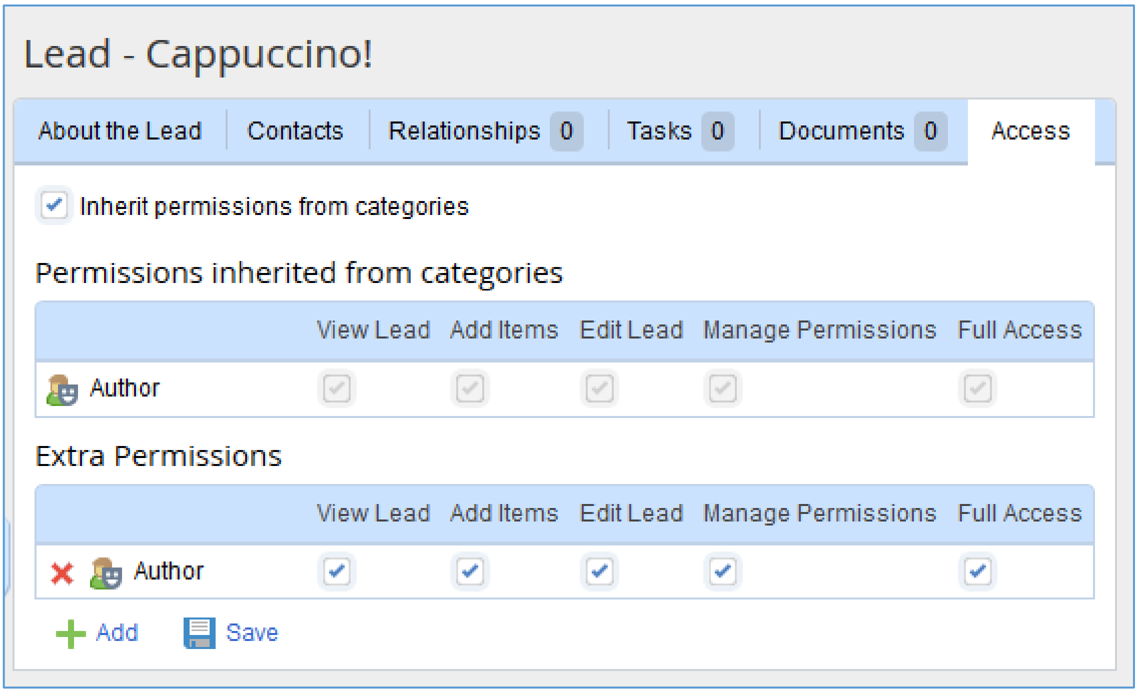


Fig. 202. Access tab on a lead page

There are several permission levels:

- **View** – permissions to view CRM object pages, editing is restricted.
- **Add Items** – permissions to add a CRM child object;
- **Edit Lead** – permissions to change data on a page;
- **Manage Permissions** – giving permissions to a CRM object page to another user;
- **Full Access** – all permissions listed above.

Only users with access level **Manage Permissions** and/or **Full Access** can change permissions to the **Leads, Contractors** and **Deals** objects. Note that these users can't give permissions of a higher level than they have.

5.2.3. Configuring Categories

You can create categories (Fig. 203) for CRM objects and set up granular access permissions to them. For instance, you can add contractors and leads in different categories based on the geographical criteria, company activity, type, size and other criteria (Fig. 203).

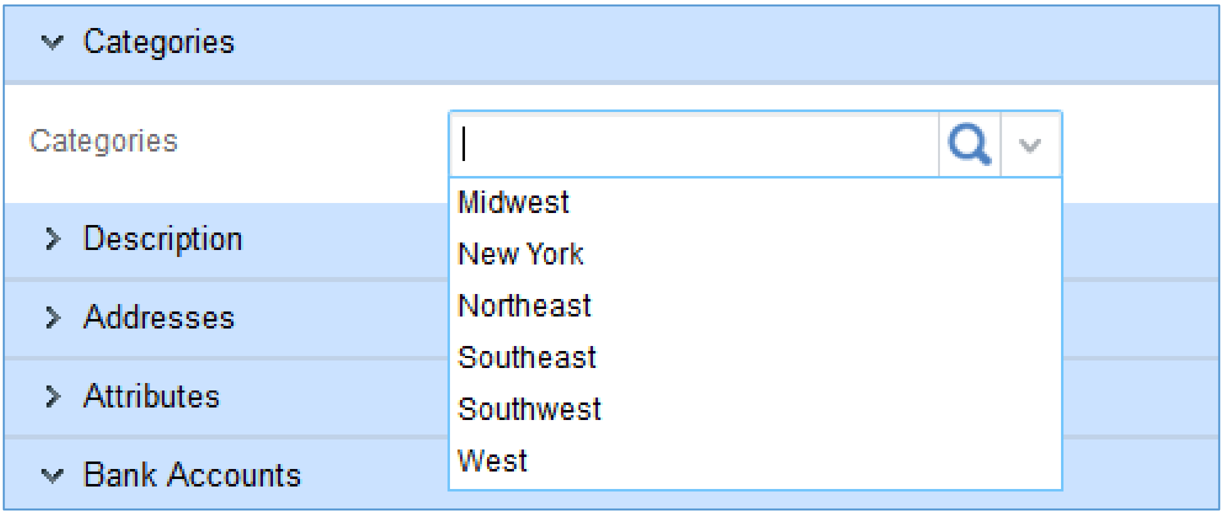


Fig. 203. Creating a company with configured categories

ELMA can automatically assign categories according to set rules. This makes things much easier when you need to create a contractor or lead.

You can configure lead and contractor categories in the following order:

1. Create categories, configure privileges for contractors and leads, and set up access permissions in ***Administration – CRM Settings – Categories*** (Fig. 204).
2. Recalculate privileges for existing categories to apply new access permissions.
3. Configure rules for automatic category assignment (optional).

When creating or editing a **Lead** and **Contractor**, users should specify the category if it is not automatically determined. Once the category is saved, only users with the corresponding permissions can access a contractor page. Contractors and leads can get additional access permissions other than the permissions inherited from the category (Fig. 202). A **Contractor** and **Lead** can belong to several categories. If so, inherited permissions are added up.

By default, the list of categories displays only one category – **No category** (Fig. 204). When you create a **Contractor** or **Lead** without specifying a category, they will inherit all the permissions from **No category.**

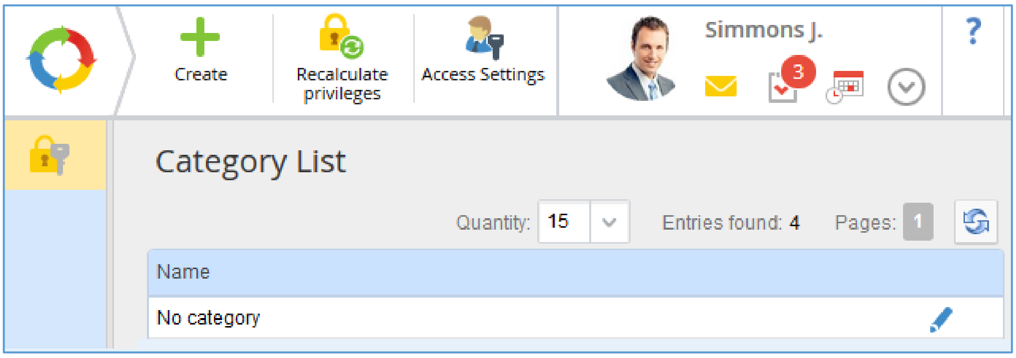


Fig. 204. Category list page

Now let's configure categories depending on the customer regions. As mentioned above, each sales department employee specializes in a particular region. In **Administration – CRM Settings – Categories**, click **Create** at the top to add a category (Fig. 205).

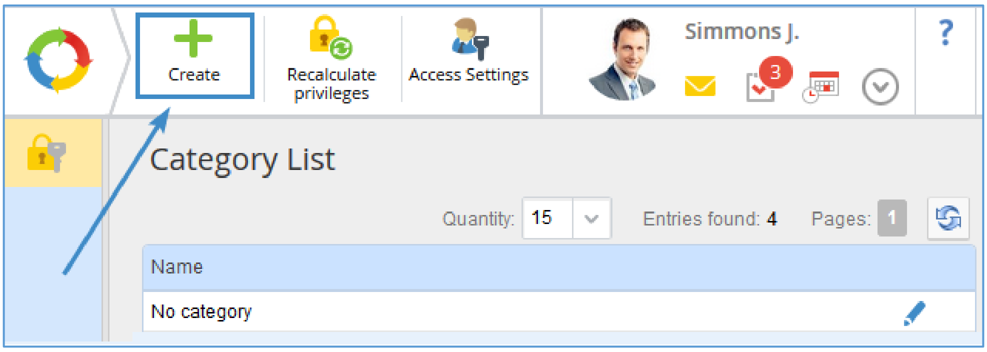


Fig. 205. Create category button

On the creation page, write the category **Name** and select privileges. Then click **Save** at the top. Fig. 206 shows an example of the 'Midwest' category.

As you can see, only users from the **Managers** group have full access to contractors and leads. Sales department users who are in the **Sales Midwest** group will be able to View and add child contractor and lead objects. **Technical specialists** can view contractor pages and edit leads. **Accounting department** employees have only 'View' privileges.

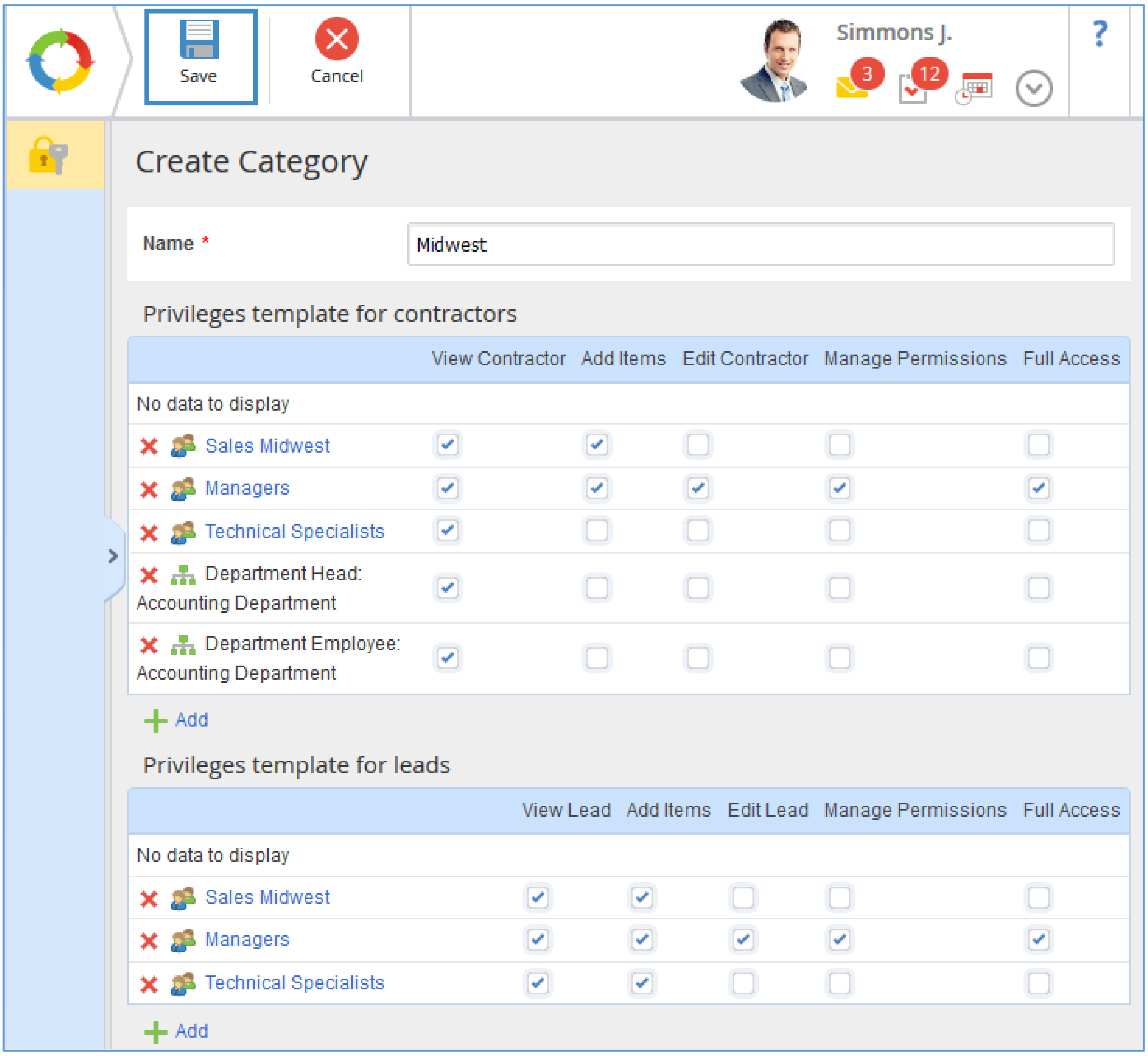


Fig. 206. Creating categories

In the same way, create four more categories for other regions: Southwest, Northeast, Southeast, and West. In Fig. 207 you can see the page with these categories.

Click **Recalculate privileges** in the top toolbar to apply the access settings (Fig. 207). The confirmation window will open where you need to **Apply accumulated permissions**. This process might take some time and the action confirmation may be required. If you want to make changes to categories and your contract base is large, it's better to recalculate privileges in non-working hours.

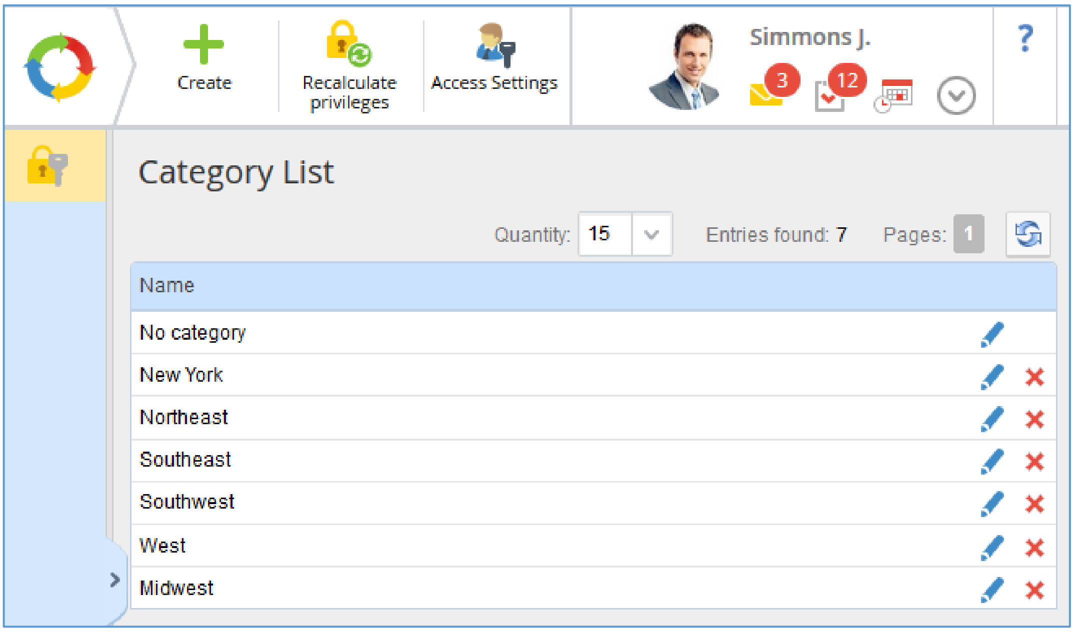


Fig. 207. Category list

Once the categories are configured, the **Contractor** or **Lead** pages where the category is specified will have inherited access permissions (Fig. 2089).

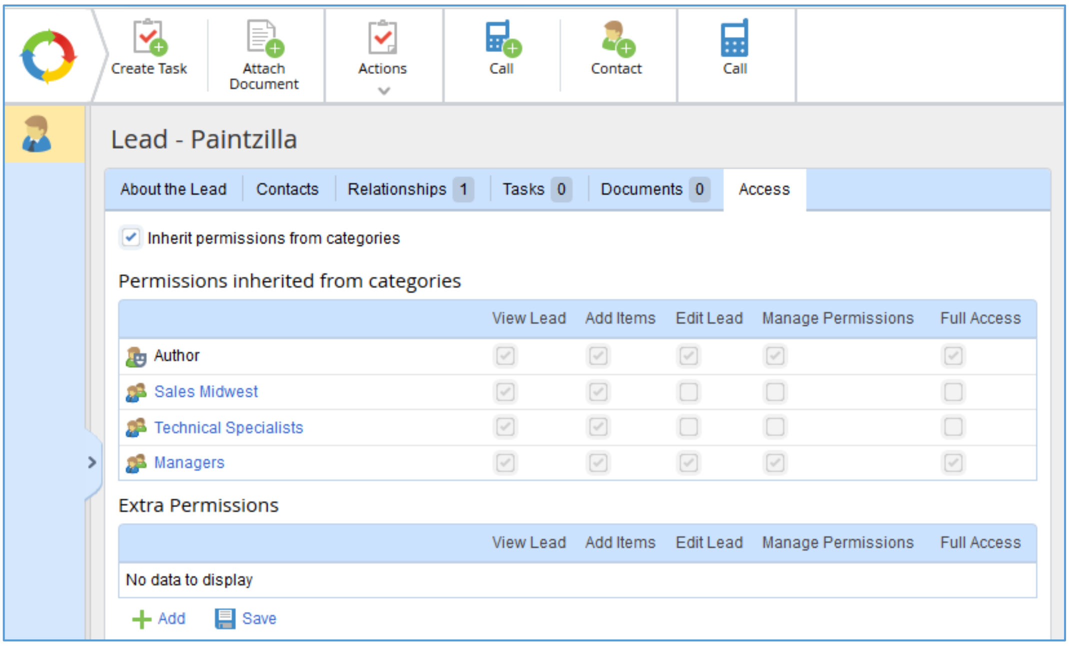


Fig. 2089. Access tab on a lead page with permissions inherited from categories

Now let's find out how to automatically categorize contractors and leads. To do that, you need to create category assignment rules. Rules are created by the System Administrator in **Administration – CRM Settings – Category Assignment Rules** (Fig. 209).

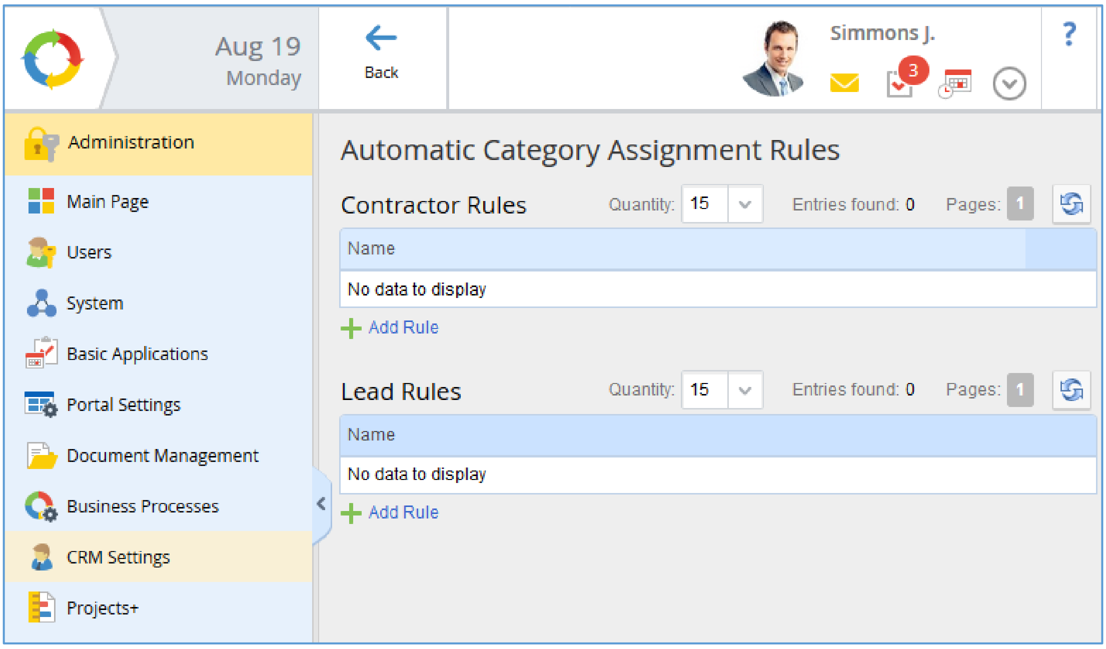


Fig. 209. Administration – CRM Settings – Category Assignment Rules

Create a rule for the automatic category assignment based on the contractor's geographical region. To do this, add items to the **Region Group** object that will represent the geographical division in the company.

Use the information in Fig. 210 to fill out the **Region group** object. For more details on filling in objects, read Section 3.2.3.

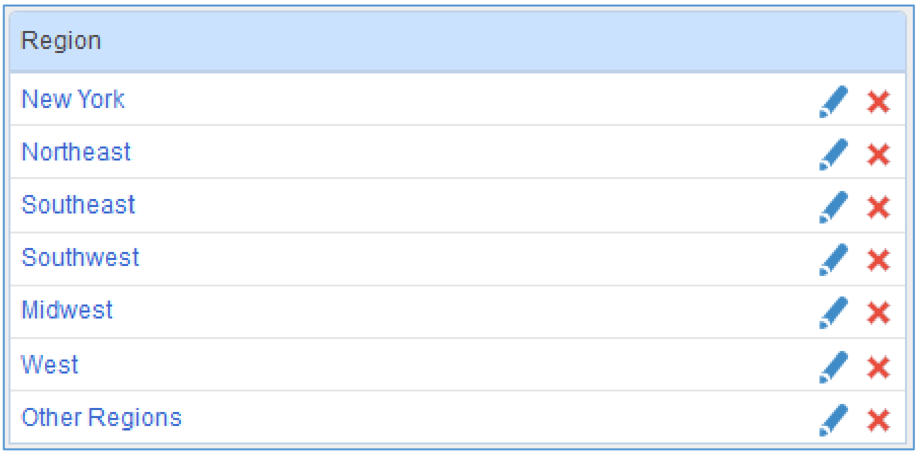


Fig. 210. Filled out 'Region Group' object

First, under the **Contractor** and **Lead Rules** panels, click **Add Rule** (Fig. 209). Then specify the **Rule Name,** choose **Categories**, and select the property values that affect category assignment. After that, create a simple rule to put contractors into the **Midwest** category:

Regular Customer Type and **Midwest Region Group**. In Fig. 211, you can see the rule creation page. Last, click **Save** in the top toolbar.

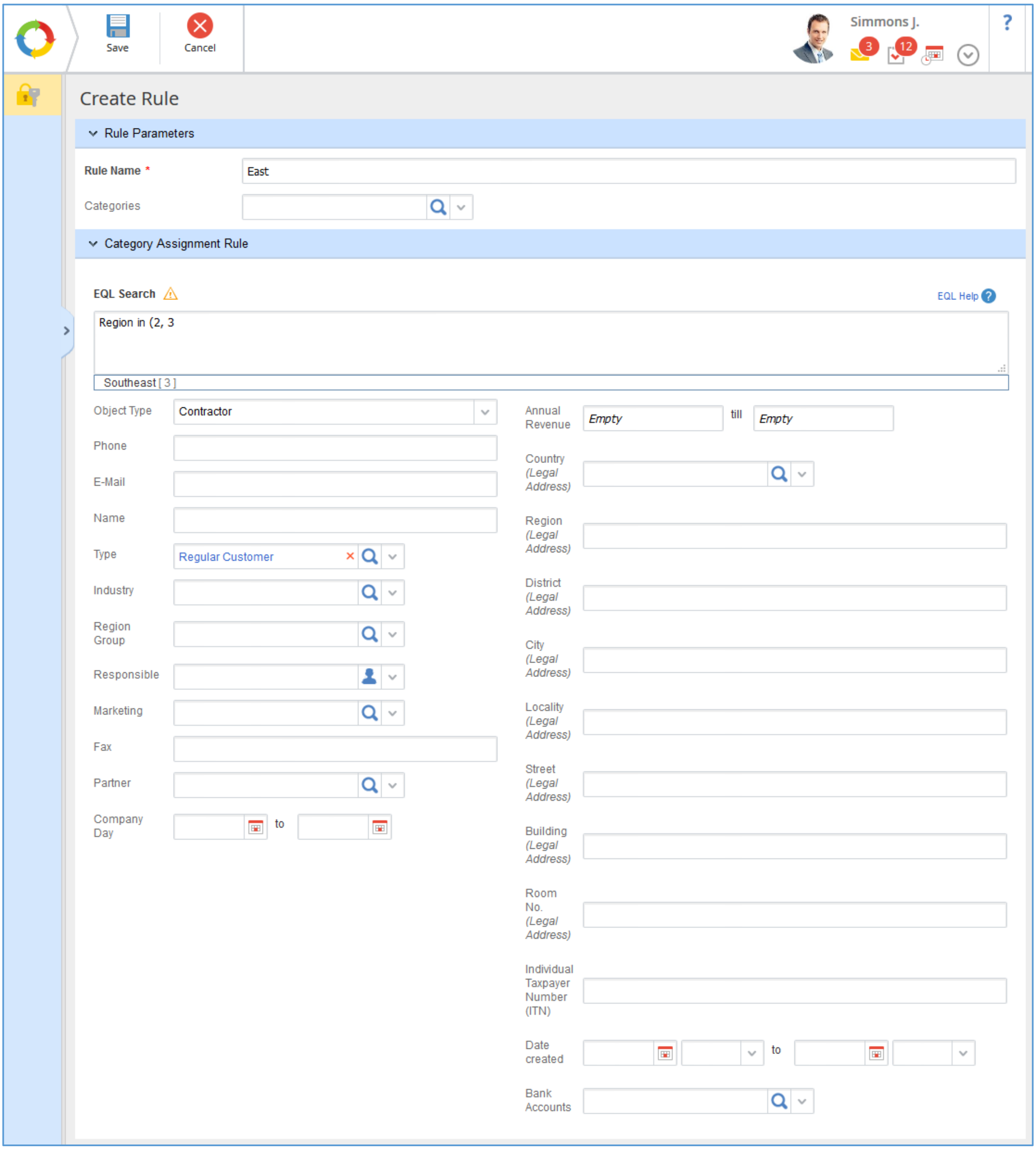


Fig. 211. Create Rule page. Rule for automatic contractor category assignment

For eastern regions, create a rule with the EQL Search. Read Section 3.4.1.1 to get the basic idea of how to work with it. The **East** category will be assigned to customers from Northeast and Southeast **Region Groups**. To do this, on the rule creation page (Fig. 212), enter the **Rule Name**, select the category to which the contractor will belong, set the **Object Type** (Contractor) and **Type** (Regular Customer), and set up region groups using EQL. For region groups, in the EQL search box, enter ‘Region in (2, 3)’. ‘2’ and ‘3’ are Ids of the Northeast and Southeast items in the **Region Group** object.

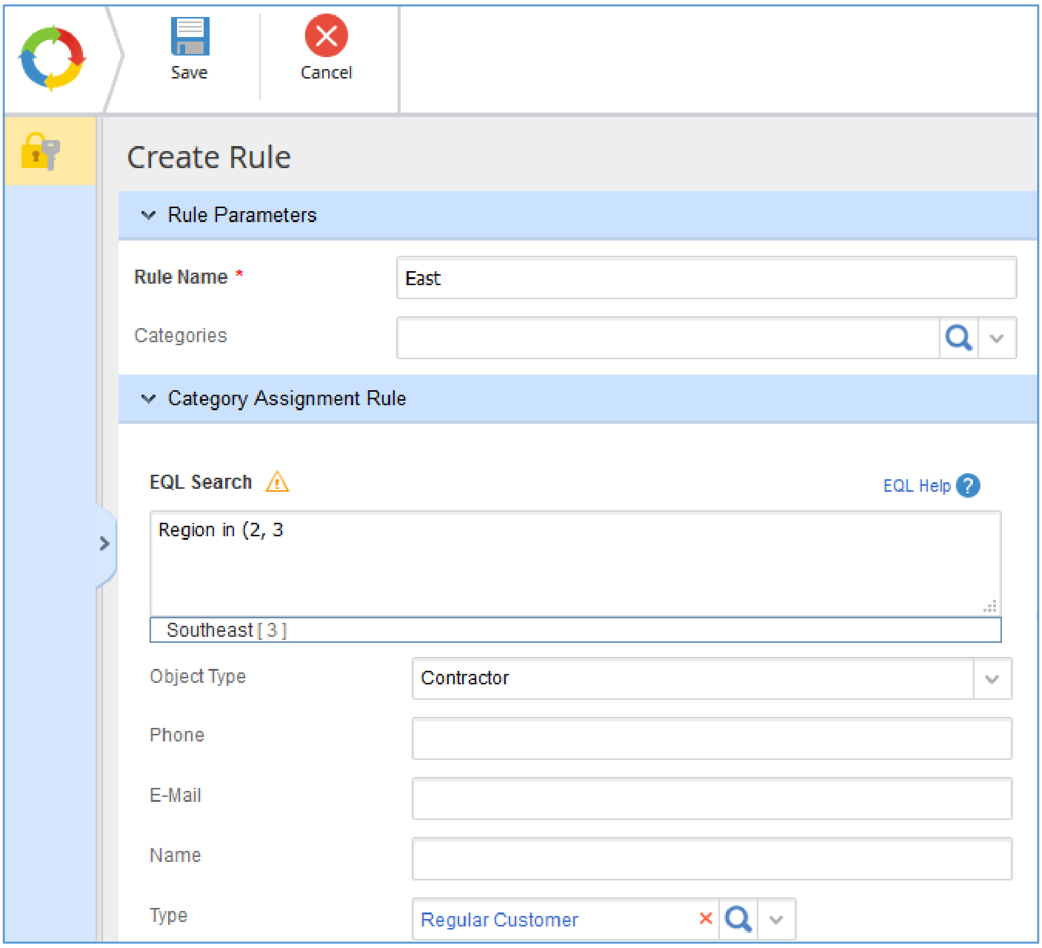


Fig. 212. Rule creation page. EQL Search

Please note IDs on your ELMA server may differ. To find the IDs in the web application, go to the **Region Group** object, select an item and find the ID in the address bar. In Fig. 213, you can see the identifier of the **Northeast** item.

Fig. 213. Region group identifier in the URL bar

Now that we have configured the necessary settings, categories will be automatically assigned to contractors and leads according to the set rules. Once you click **Save**, you will see the following notification (Fig. 214):

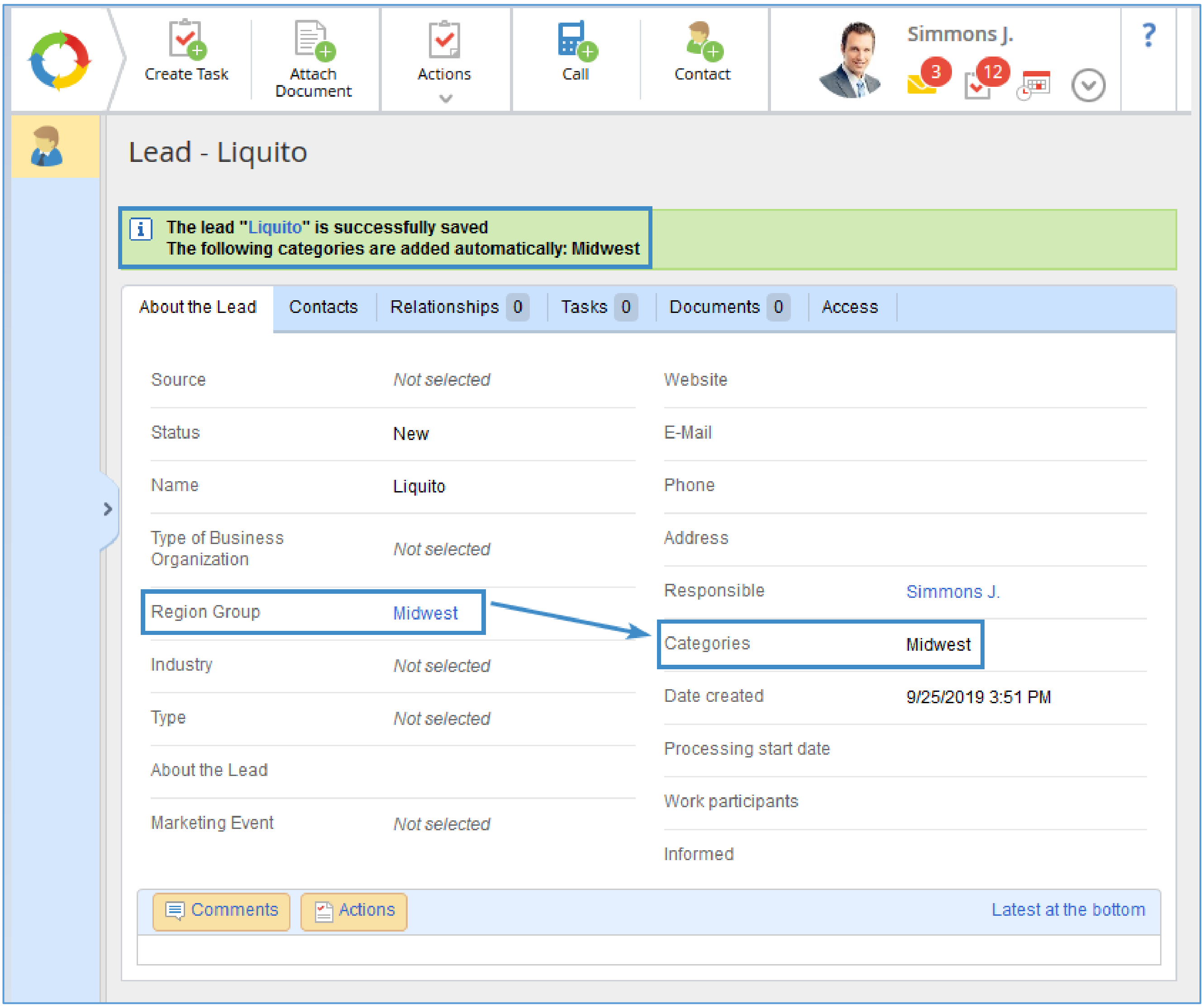


Fig. 214. Saving a contractor page with a category assigned by a rule

When a category is assigned automatically, the access permissions to the **Contractor** and **Lead** page are also inherited.

Next, we'll be considering how to restrict access permissions to properties within a CRM object.

5.2.4. Configuring Access Permissions to Fields and Properties of CRM Objects

You can manage access to important information inside a CRM object by configuring permissions to the object fields and properties. These permissions can be configured by the admin in ***Administration – CRM Settings – Access permissions to fields and properties*** (Fig. 215).

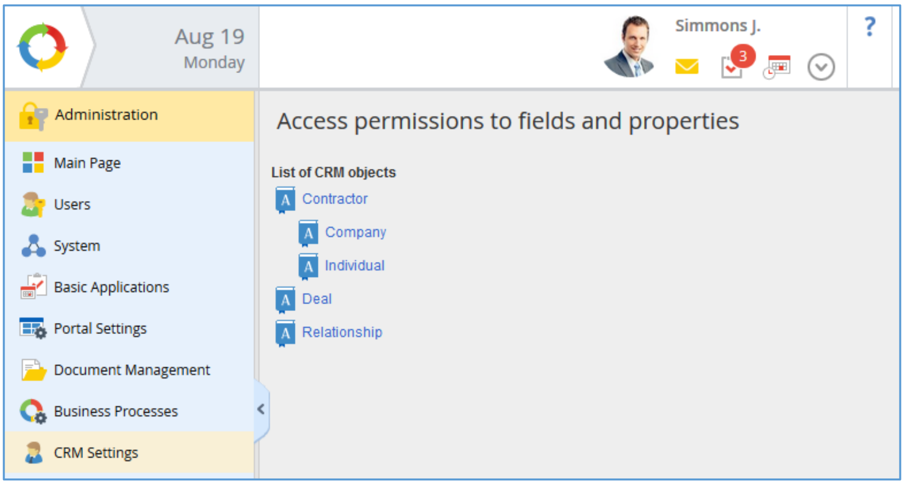


Fig. 215. Administration – CRM Settings – Access permissions to fields and properties

You can restrict access to both system and custom fields and properties of CRM objects. You cannot hide the fields that are the name of an object.

As an example, let's restrict access to the **Sales Volume** property in the **Deal** object. First, select **Deal** in the list of objects on the access settings page. This will open the page **Access permissions to fields and properties of the "Deal" object**. Click **Add property,** select the **Sales Volume** property (Fig. 216) and **Add it.**

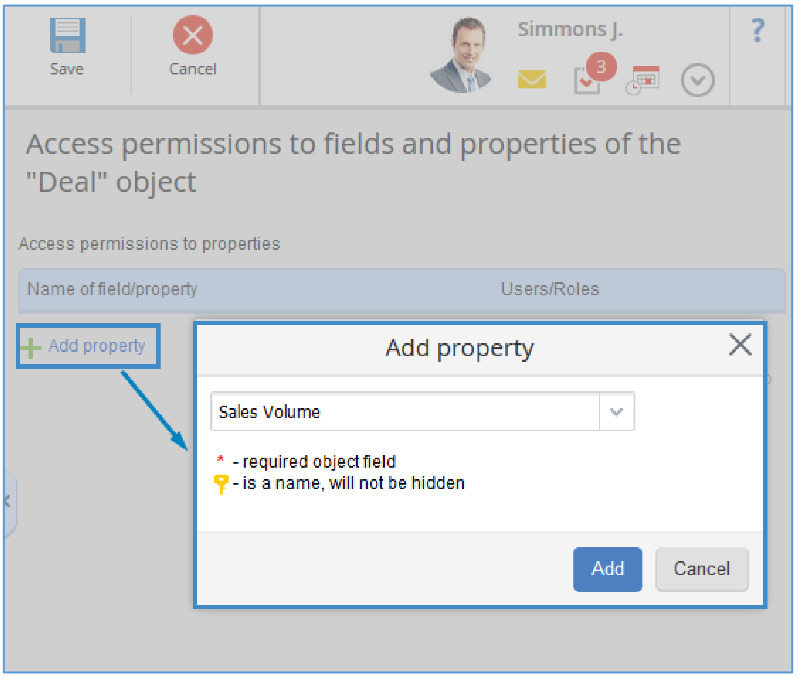


Fig. 216. Access permissions to fields and properties of the "Deal" object. Adding property

By default, all the fields of the **Deal** object can be viewed and/or edited by the user who has the view/edit object permissions. However, you can configure the fields of the object. Note that access permissions are granted personally to a user, group of users, org chart elements and/or property (if we take the **Deal** object as an example, the properties are **Author** and **Responsible**).

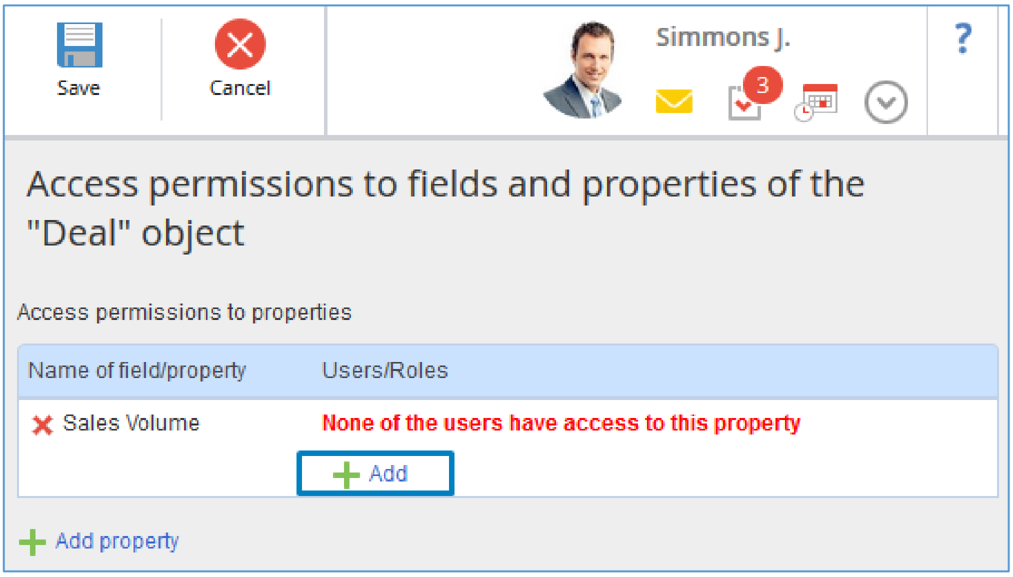


Fig. 217. Adding users/roles to configure permissions to the object property

For the **Sales Volume** property, set the access permissions as in Fig. . Remember to **Save** the changes.

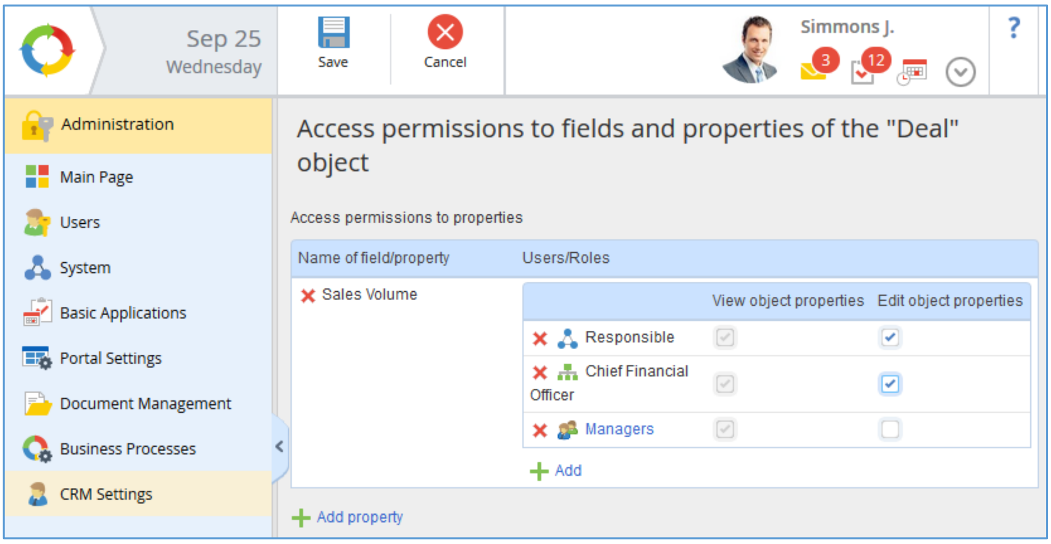


Fig. 219. Configuring access permissions, to the Sales Volume of the Deal object

Once you've configured the access, only the user who takes the Chief Financial Officer position and the user who is responsible for the deal can edit the Sales Volume property. Besides, the users included into the **Managers** group can view the property. Other users who have access to the deal will not see the property.

In Fig. 218 you can see two examples of deal pages with and without the access to the **Sales Volume** field.

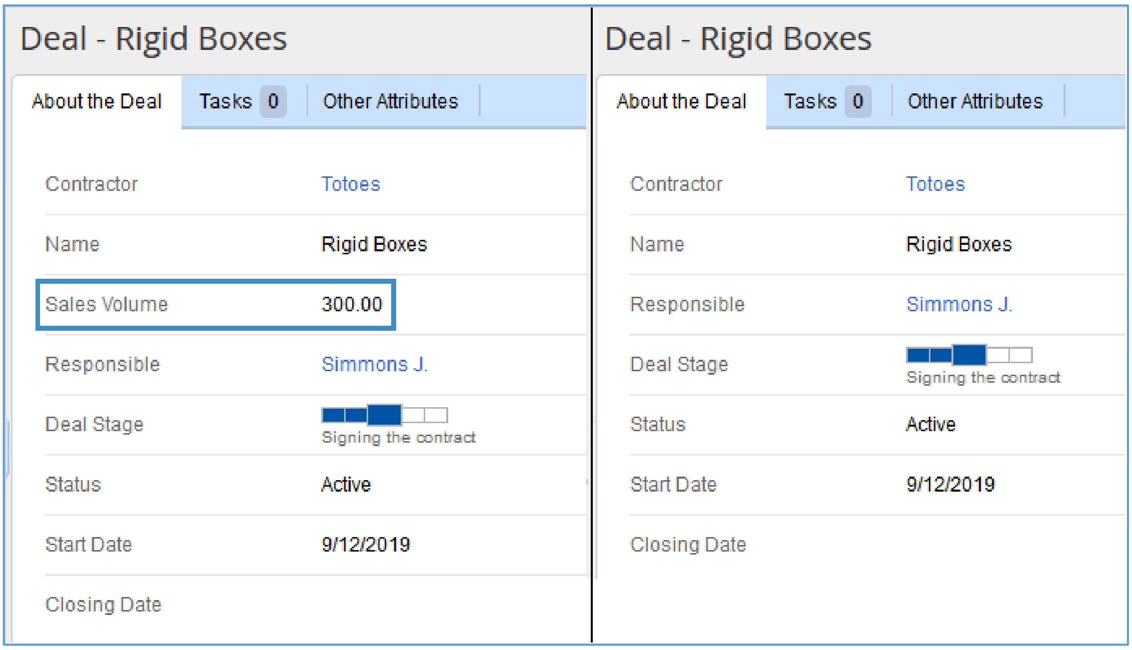


Fig. 218. Deal object with and without access permissions to the sales volume property

You will also be unable to add for display fields and properties with restricted access to the **Data Table** columns. You can restrict access to various properties of the object with unique access permissions.

5.3. Active Sales Funnel

The main tool for organizing long-cycle sales in CRM is the **Active Sales Funnel**. This is a sales funnel in which, when moving from one stage of a deal to another, a business process starts. While a process is being executed, certain conditions can be checked and/or some action might be performed necessary to move to the next stage of the deal.

The active sales funnel feature is available only if you activate your **ELMA CRM+ application.** Such an active sales funnel will work properly only if your business processes have and execute a deal change activity.

Let's take the company described at the beginning of this chapter as an example of an active sales funnel and the following actions:

1. Create a sales funnel and deal stages.
2. Model business processes for deal stages.
3. Link business processes to transitions between deal stages.

Section 3.3.3 describes in detail how to create a sales funnel. Now let's create a new one (Fig. 219) that will have the following stages:

1. Initial contact.
2. Sales proposal.
3. Signing contract.
4. Equipment shipment and installation.
5. Closing deal.

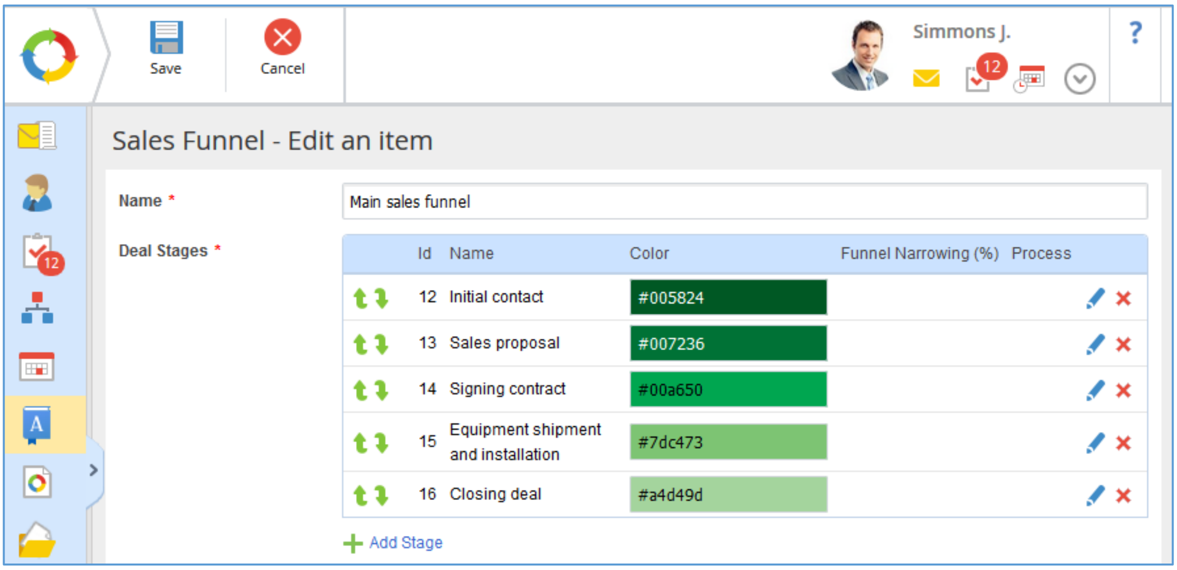


Fig. 219. Sales funnel

Now let's create two deal types – **Supply and installation of equipment** and **Supply of equipment**. This will help us to distinguish between the 'supply' deals and the 'supply and install' deals. Remember to link both deal types with the created sales funnel (Fig. 220).

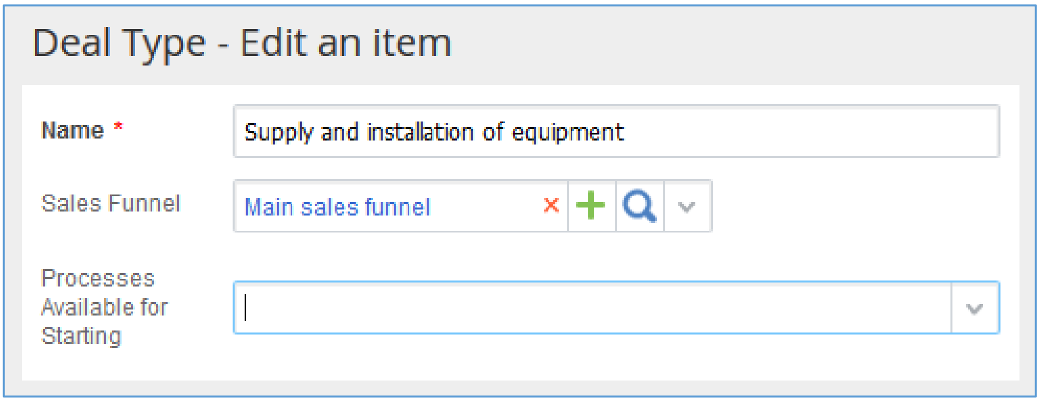


Fig. 220. Linking deal type with sales funnel

The next step is to model business processes that will start when a deal goes to the next stage. Note that it's not necessary to create business processes for all transitions between deal stages.

Active sales funnel processes are modeled in the ELMA Designer as regular processes. However, you should take these aspects into consideration:

- There must be an output variable of the **Deal** type;
- At different stages of a business process, you will need to use the **Change Deal Properties** activity or a script in order to configure changing deal stages;
- There must be two input variables of the **Deal stage** type, so that initial and new stages of a deal can be stored in a process;
- The user who configures the change of deal stages in business processes must have permissions to start these processes.

Now let's create the business process 'Sales Proposal Approval' that will start when the **Initial Contact** stage will change to **Sales Proposal**. For more details on business process creation, see Section 4.2.1, ELMA Help, and User Manual on ELMA BPM Platform.

This section describes the key features of developing a business process for an active sales funnel. To model the processes, use the previously set up org chart (Fig. 182). Remember to publish the chart so that you can work with it in the web application.

Let's assume that the company works with sales proposals in the following way (Fig. 221):

1. The sales representative finds out about a potential customer's needs and makes a proposal;
2. The Sales Head approves it;

3. The Chief Engineer approves it (checks the contents of the proposal and if the equipment being offered complies with the customer's request);
4. The Head of the logistics department approves the delivery dates;
5. If the sales proposal is more than 10000$, it is additionally approved by the CFO.

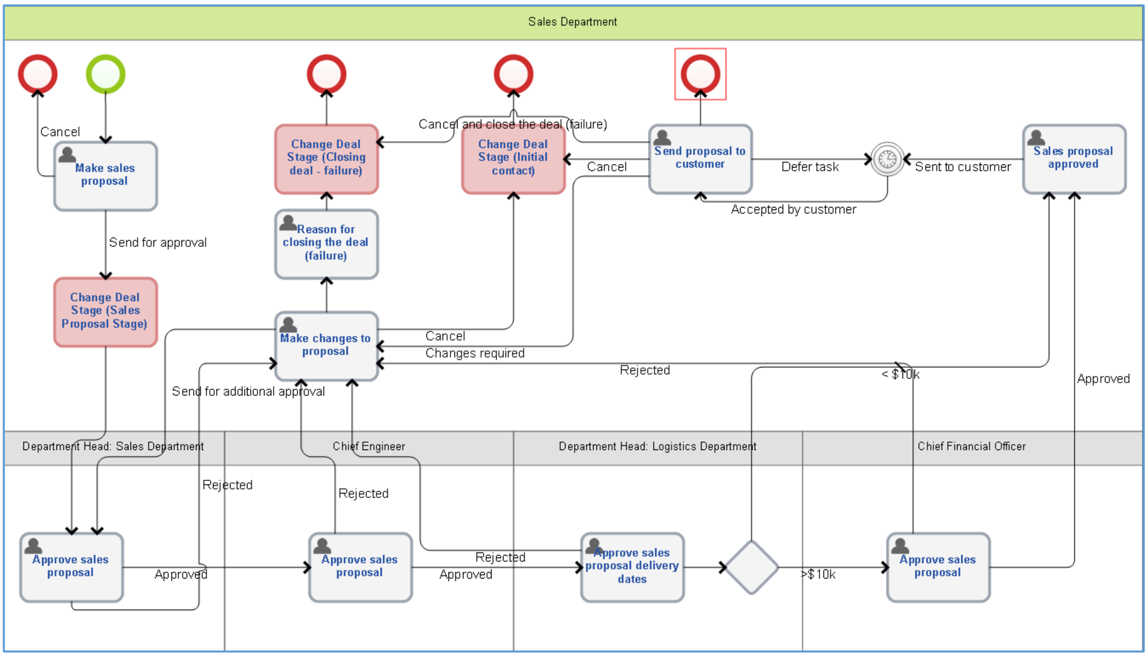
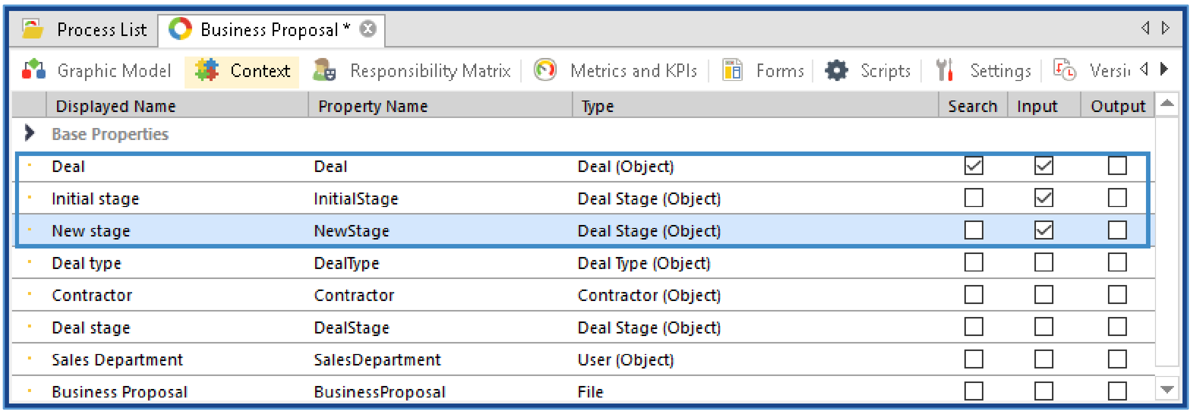


Fig. 221. Business process map. Sales proposal approval

Below you will find out how to configure the main elements of the process (Fig. 222).



Displayed Name	Property Name	Type	Search	Input	Output
Base Properties					
Deal	Deal	Deal (Object)	☑	☑	☐
Initial stage	InitialStage	Deal Stage (Object)	☐	☑	☐
New stage	NewStage	Deal Stage (Object)	☐	☑	☐
Deal type	DealType	Deal Type (Object)	☐	☐	☐
Contractor	Contractor	Contractor (Object)	☐	☐	☐
Deal stage	DealStage	Deal Stage (Object)	☐	☐	☐
Sales Department	SalesDepartment	User (Object)	☐	☐	☐
Business Proposal	BusinessProposal	File	☐	☐	☐

Fig. 222. Context variables for sales funnel process

One of the activities used in the process is **Change Deal Properties**. You can find this activity in the sidebar in **Plug-Ins – Custom Activities – CRM Expert.** For more details, check out Section 4.2.5.2.

You can use this custom activity and set various deal stages depending on how a process is executed. In this process, there are three activities that are used to change deal properties:

1. **Change Deal Stage (Sales Proposal Stage)** (Fig. 223). When the process goes through this activity, the deal stage changes to 'Sales Proposal'. Note that the stage will change only when you send the proposal for approval (i.e. if you click 'Cancel', the stage will remain unchanged).
2. **Change Deal Stage (Closing deal – failure)** (Fig. 224). When the process passes through this activity, the deal stage changes to 'Closing deal – failure'.
3. **Change Deal Stage (Initial contact)** (Fig. 225). When the process passes through this activity, it returns to the 'Initial contact' stage and the proposal is canceled.

Please note that the **Process Context** data in the **Deal Stage** parameter are filled in with the help of an identifier (ID) that is automatically assigned to **Deal Stages** when configuring the sales funnel (see Fig. 219). Besides, keep in mind that identifiers might vary in different configurations.

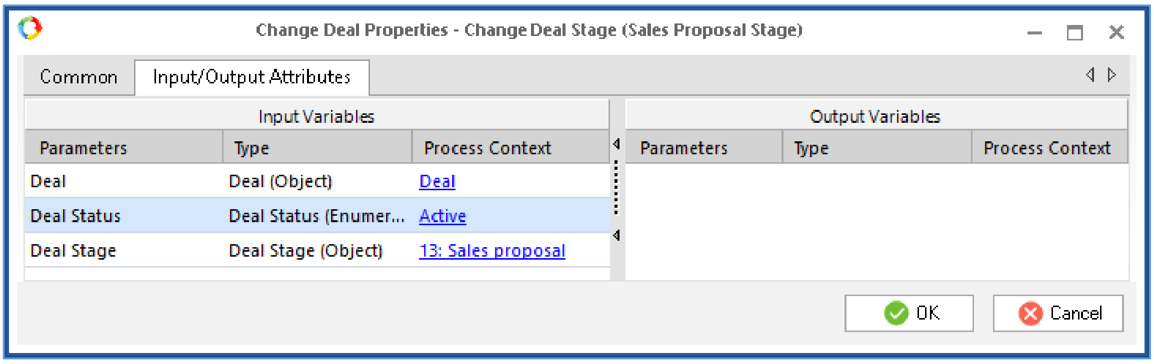


Fig. 223. Change Deal Properties – Commercial Offer stage

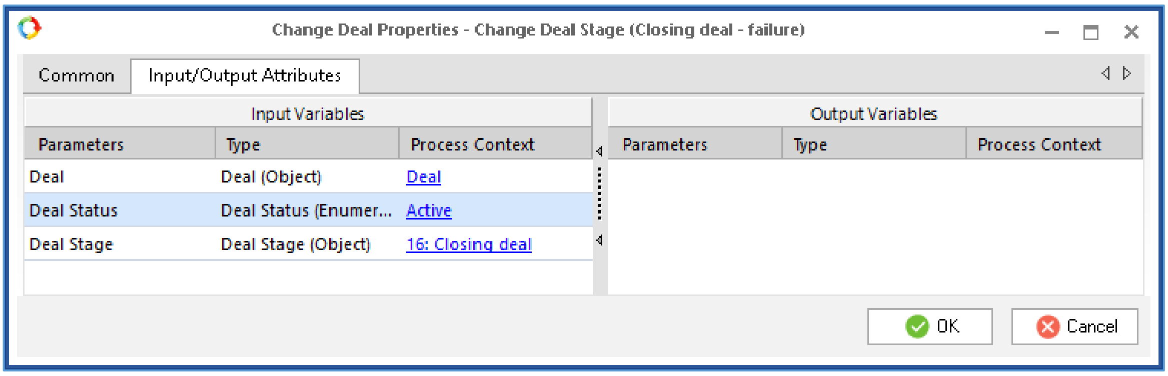


Fig. 224. Change Deal Properties – Closed (Failure)

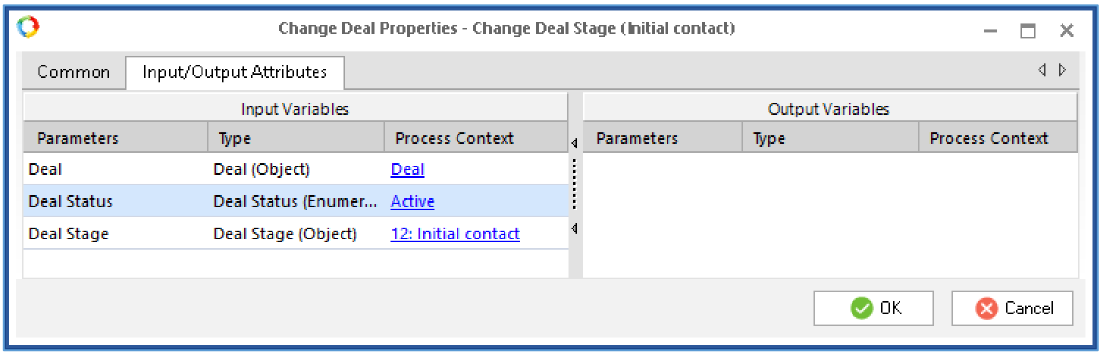


Fig. 225. Change Deal Properties – Initial Contact stage

In Fig. 226, you can see an example of configuring the **Make Sales Proposal** task. The task executor (a sales rep) will have to attach a commercial offer file and leave a comment if necessary.

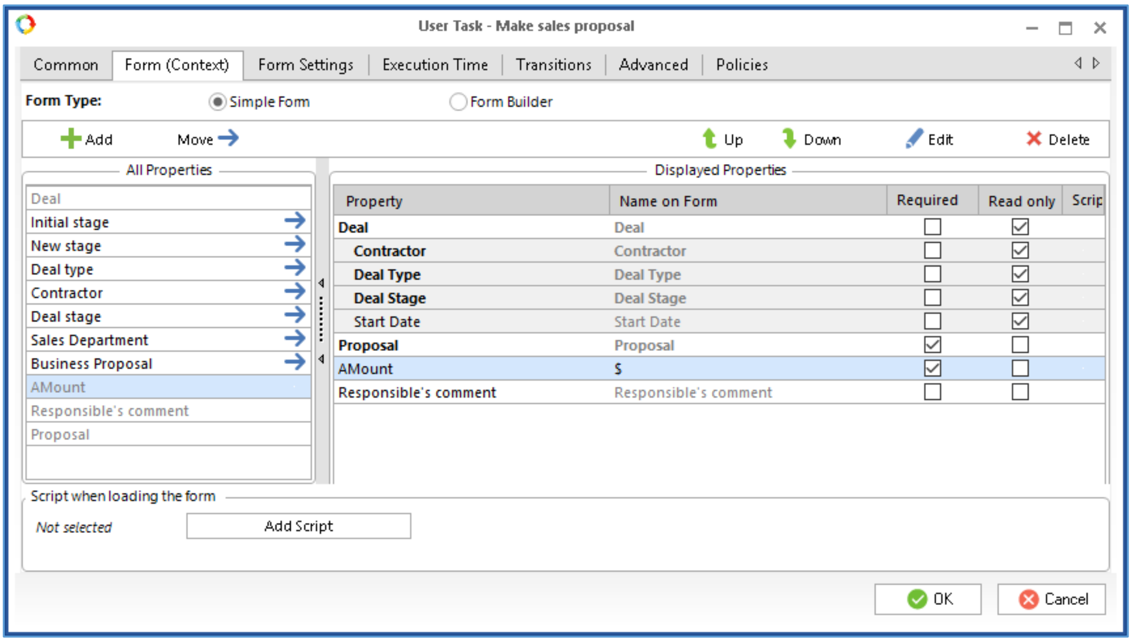


Fig. 226. Configuring Create Commercial Offer task

Now let's configure the process instance naming method – **Sales Proposal Approval for {$Context.Contractor.Name} {$Context.Deal.Name}**. See Section 4.2.4 to find out how instances are named. Before going any further, publish the created business process.

For active sales funnel processes, **Document Management** activities are often used. For example, you can approve different types of documents using the **ELMA ECM+ app**. To find out more, refer to ELMA ECM+ Help and ECM+ Application Quick Start.

Now that we are almost done with configuring the active sales funnel, let's link the business process to the changing stages of the deal. To do so, go to the web application and open

Administration – CRM Settings – Sales Funnel, and click next to the required sales funnel (Fig. 219)

On this page you can link your business process to changing the deal stages. To do so, edit the **Sales Proposal** stage by clicking next to it and enter the following data in the window that opens (Fig. 227):

- **Process** – business process that will start once the deal has moved to the **Sales Proposal** stage. In this case, it is the **Sales Proposal Approval** process;
- **Context Variable of Deal Initial Stage** and **Context Variable of Deal New Stage** – if there are input variables for the deal stages in the process, they must be specified in the properties;
- **Instance Name** – used if the name of the business process instance is different from the one configured in the ELMA Designer during the process modeling.

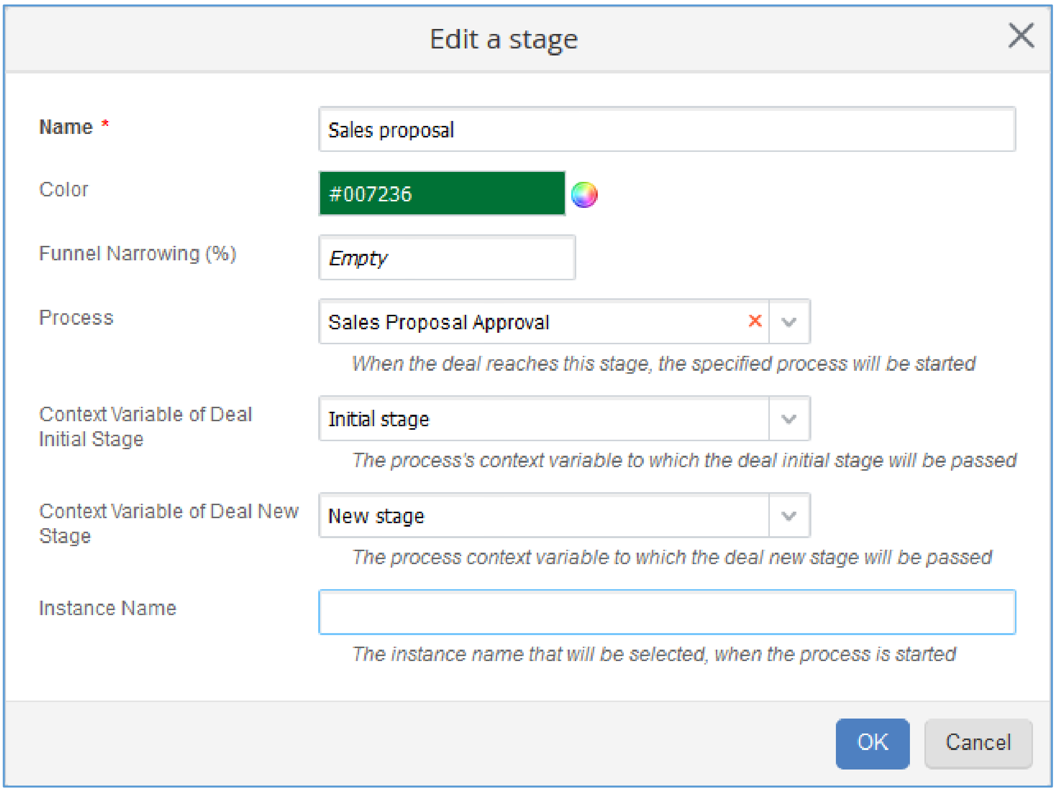


Fig. 227. Edit a stage of the sales funnel

When you have entered all the necessary information, click **OK** in the **Edit a stage** window (Fig. 227) and then **Save** on the edit sales funnel page. The name of the process linked to the transition between stages is displayed in the **Process** column (Fig. 228).

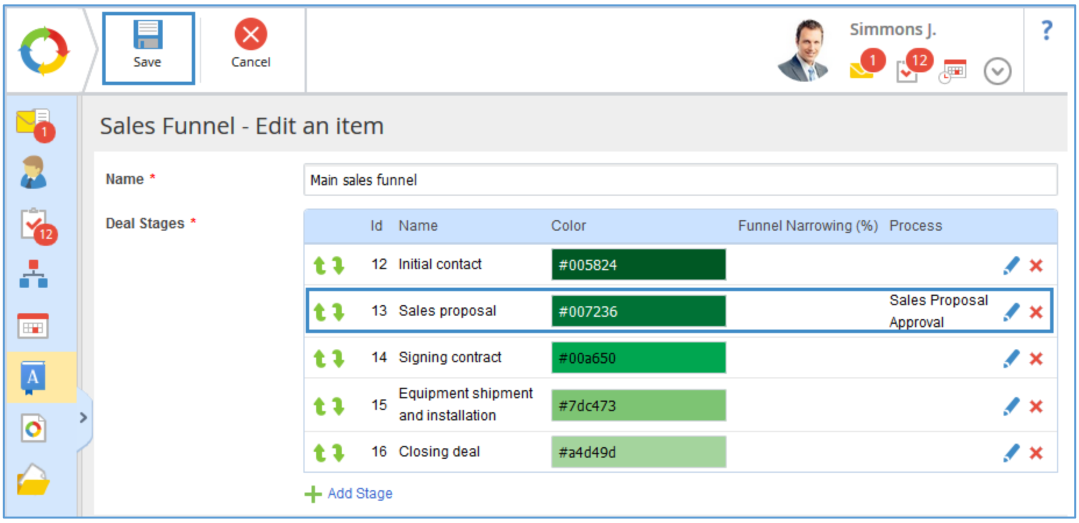


Fig. 228. Sales funnel with a linked process

Now that the changes are applied, the business process ‘Sales proposal approval’ will start automatically every time the **Sales Proposal** stage is set for the deal types **Supply of equipment** and **Supply and installation of equipment**. The initiator of the process will be the user who changed the stage. The **Initial Contact** stage will change to **Sales proposal** only when the **Change Deal Stage (Sales Proposal Stage)** activity has been completed.

Only one process instance tied to the deal stage can be started for each deal. When you retry to move to any stage of a deal, a warning will appear about a previously started process. In this warning, you can select one of the actions (Fig. 229):

- **Interrupt** – previously started process will be interrupted;
- **Continue** – previously started process will remain running;
- **Cancel** – cancel stage change.

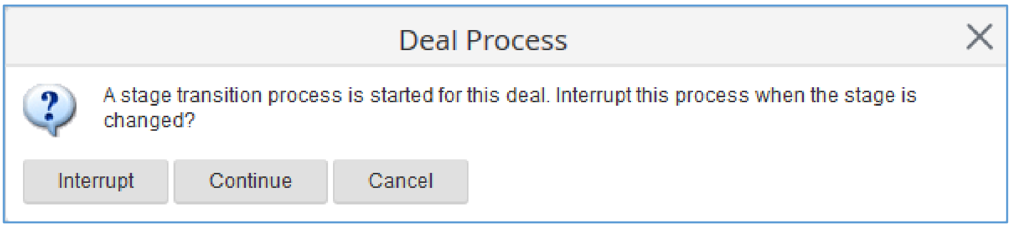


Fig. 229. Warning about a running process when a deal stage changes

You can create another simple business process that will be started when you move to the **Closing Deal** stage. In this process, the Sales Department Head must approve closing the deal, and the accounting department must confirm that the payment has been made and the required documents have been signed and received. In Fig. 230, you can see the map of such a process.

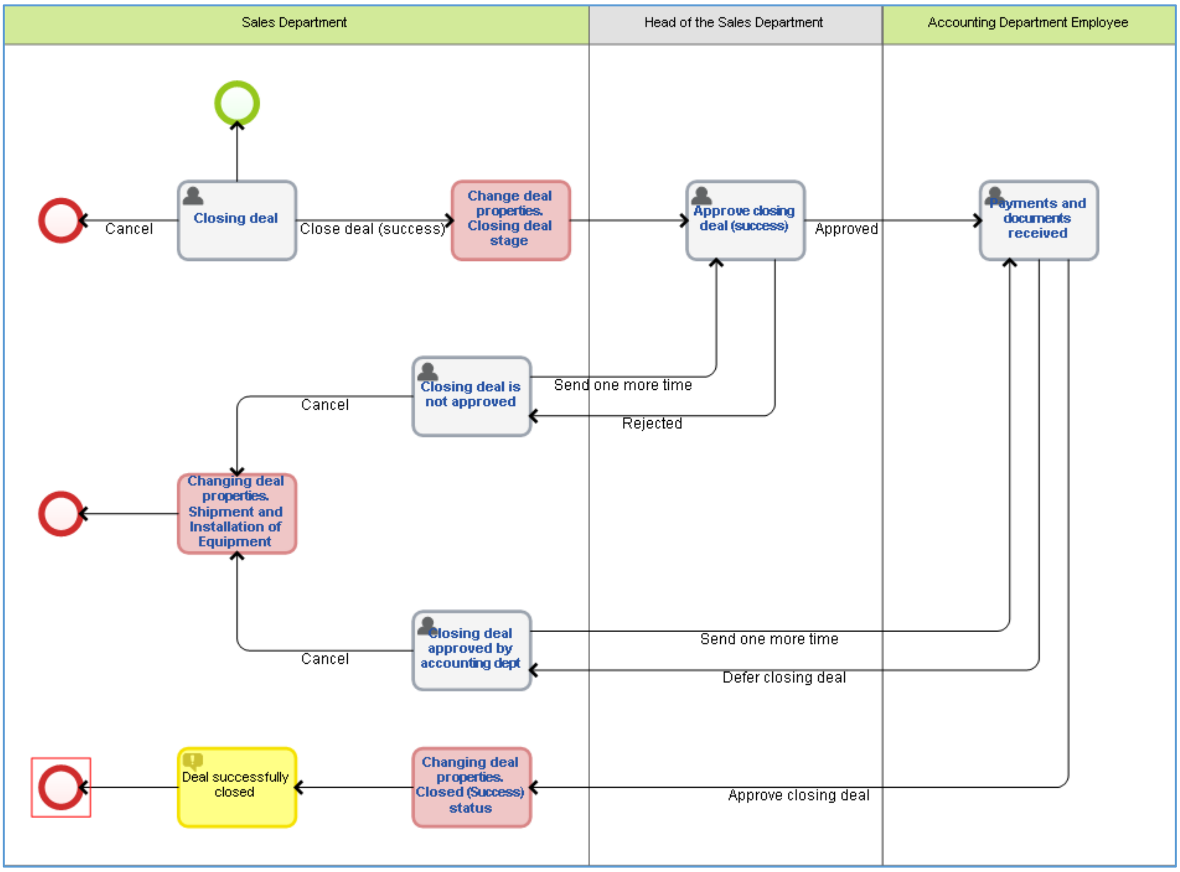


Fig. 230. Closing a deal business process map

There are 3 swimlanes in this process:

- **Sales department.** A sales rep or the Sales Department Head initiates the **Closing Deal** process;
- **Head of the Sales Department** checks if there is enough information about the deal and approves its closing;
- **Accounting Department Employee** checks if there are any deal debts and makes sure all the necessary documents are at hand.

The 'Closing Deal' business process has two activities that are used to change the deal properties. They are filled in in the same way as the fields in Fig. 223 – Fig. 225:

1. **Change deal properties. Closing deal stage –** when a process passes through this activity, the deal stage changes to **Closing Deal**.
2. **Changing deal properties. Closed (Success) status** – when a process passes through this activity, the deal stage changes to **Closed (success)**. The deal is sealed.
3. **Changing deal properties. Shipment and Installation of Equipment** – if, for one reason or another, a deal was not closed and was rejected by the sales department management or the accounting department, the deal stage changes to the previous

stage (**Shipment and Installation of Equipment**) when the process passes through this activity.

In the same fashion, you can use **CRM Expert** plug-ins to create and configure business processes for each deal stage depending on the requirements for CRM set out by a specific company.

5.4. Configuring Reports

ELMA CRM+ has built-in tools for sales department performance analysis.

An integral part of any system, including CRM, is the analytics section. You can configure it so that users a holistic overview of the sales performance information. **ELMA CRM+** offers the following reports: **Sales Funnel**, **Deal Dynamics**, **Payments**.

In addition, managers can find summary data on the performance of each sales rep in the **Reports** section. For more information on monitoring schedule compliance, read Chapter 5 of User Manual on the Web Portal.

Now let's take a closer look at each of these reports.

5.4.1. Sales Funnel Report

The **Sales Funnel** report is a classic tool for analyzing a sales funnel. It allows you to analyze the conversion when a deal moves from stage to stage. This report is available in **CRM – Sales Funnels** (Fig. 231). You can use several sales funnels simultaneously, and for each one the report will be available.

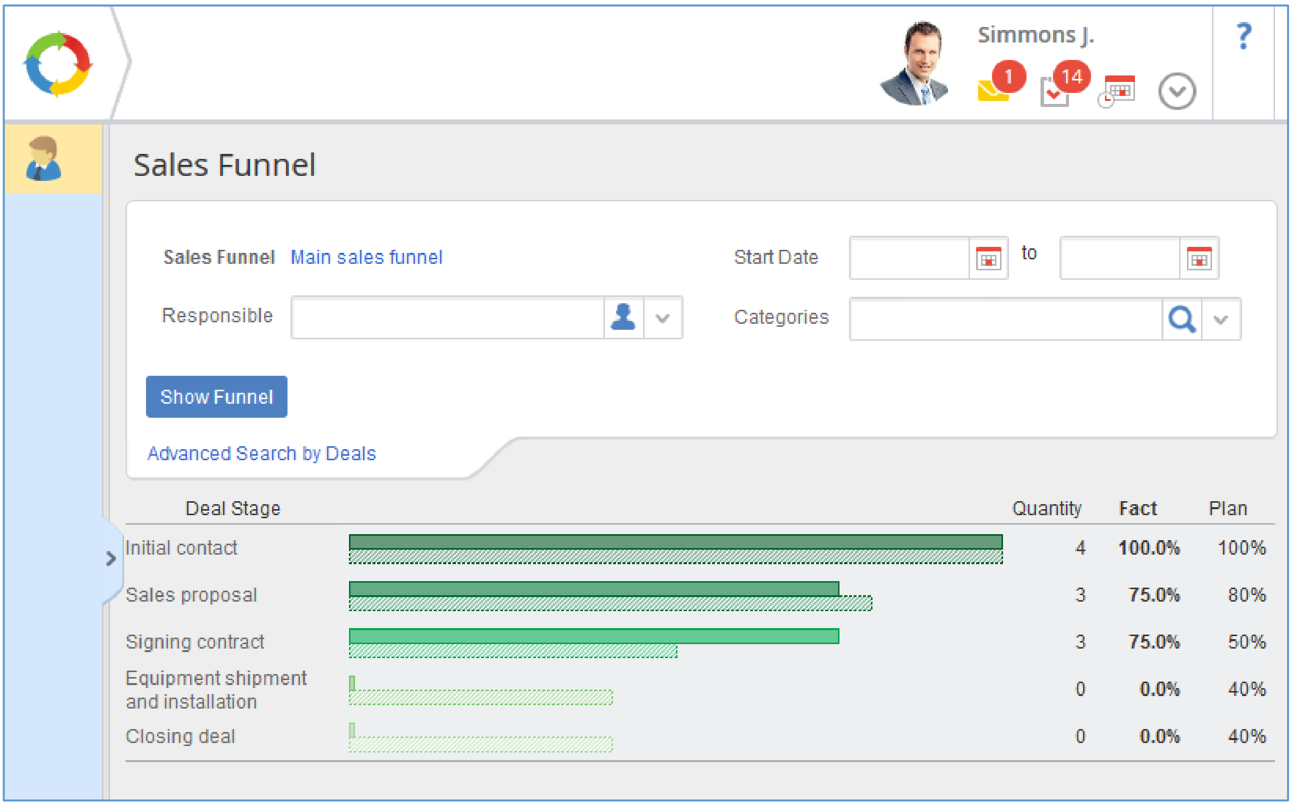


Fig. 231. CRM – Sales Funnels

To be able to view the reports, configure general access permissions first in ***Administration – CRM Settings – Access Permissions – Access to Sales Funnels*** (Fig. 201).

The report is displayed as a chart showing the number of deals at each stage of the funnel. The chart features plan and fact values. The columns with solid fill represent the fact value, whereas cross-hatched columns show the plan value.

In Fig. 231 you can see a **Sales Funnel** report without additional parameters, i.e. filters. The main filters are:

- **Responsible –** report displays only those deals for which the specified users are responsible;
- **Start Date –** report displays only those deals that start during the specified range;
- **Categories** – report displays only the deals with the contractors of specified categories.

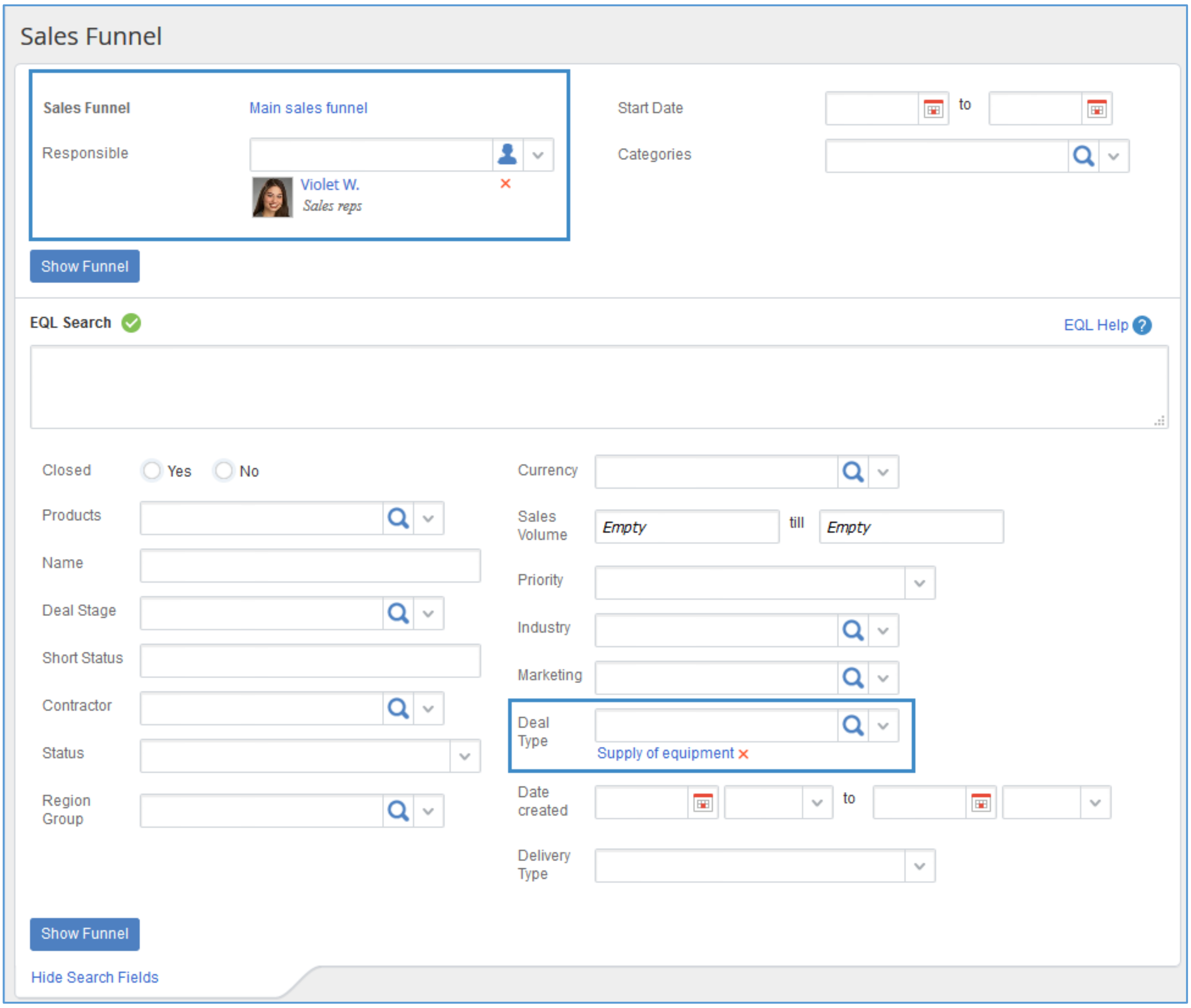


Fig. 232. Advanced search by deals in the Sales Funnel report

You can also use the advanced search that allows you to filter sales funnels based on various parameters. For example, in Fig. 232 the following filters are applied: the **Supply of Equipment** deal type and Violet Wyatt as a responsible.

The **Sales Funnel** report gives you a holistic view of all deals, which allows you to analyze the situation and see at which stage the customer service is poor. Thus, you can react timely and make every effort to enhance your interaction with a customer.

5.4.2. Deal Dynamics Report

The **Deals Dynamics** report allows you to obtain information about the current state of deals for a selected sales funnel. This report displays the necessary information about the number of deals at each stage, and the number of deals for a selected period that moved to another stage or succeeded/failed.

You can find this report in **CRM – Deal Dynamics** (Fig. 233).

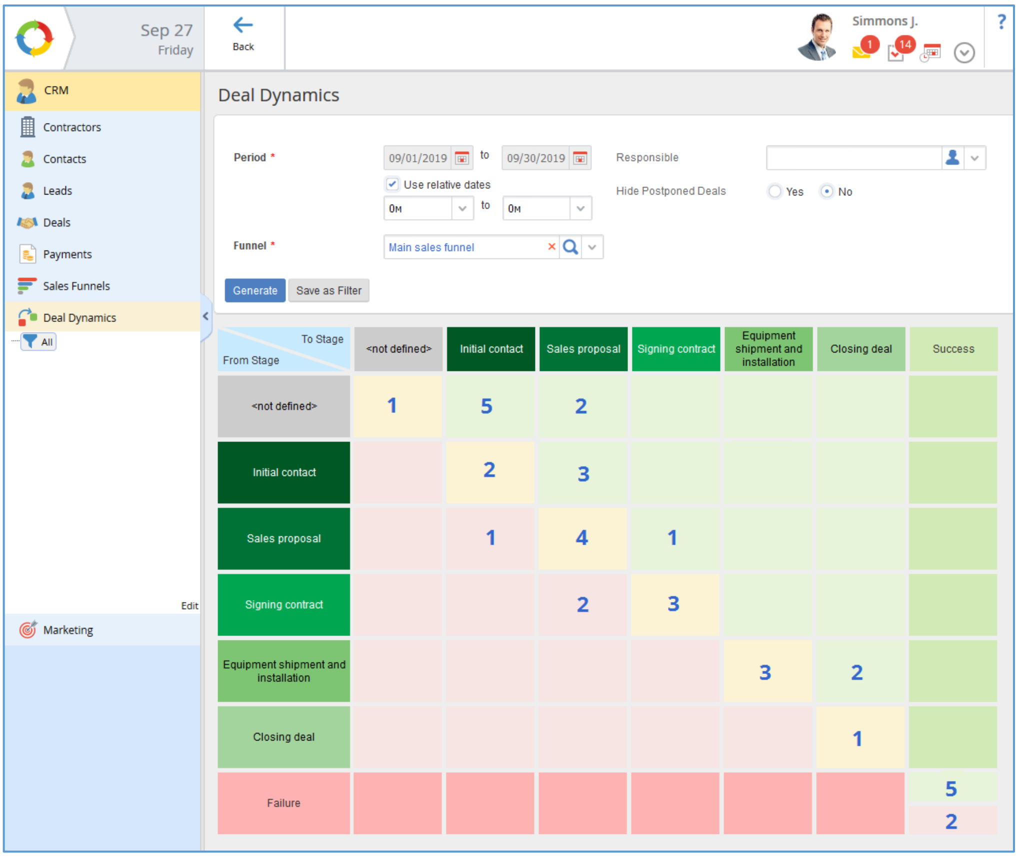


Fig. 233. Deal dynamics report

To be able to view the report, first, configure general access permissions in ***Administration – CRM Settings – Access Permissions – View deal dynamics*** (Fig. 201).

Deal Dynamics is displayed as a table. Its rows and columns contain deal stage names for a selected sales funnel. The colors of the stage names correspond to the colors defined in the sales funnel.

The yellow squares show deals whose stage has not changed during a specified period of time.

Above the diagonal line, there are light green squares. They represent the number of deals with positive dynamics, i.e. the deals that have moved to the next stage within a given period of time. Each square is at the intersection of two lines: a row and a column. The previous stage is indicated in the row name, whereas the current stage – in the column name.

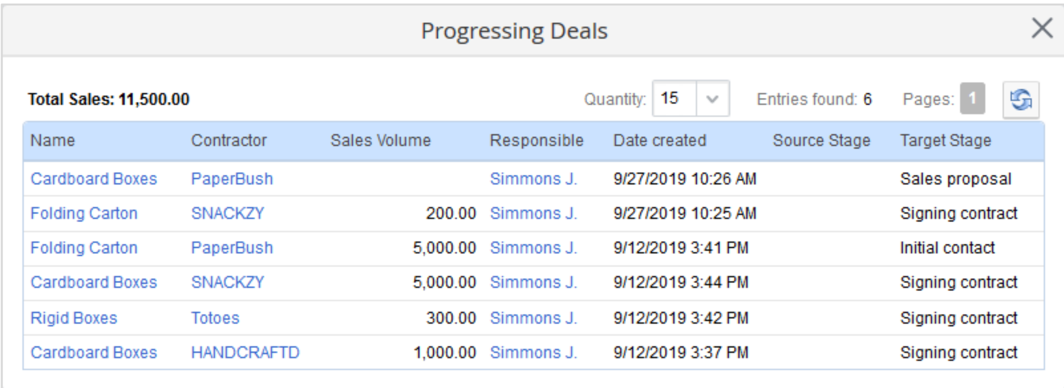
Below the diagonal line, there are light pink squares. They represent the number of deals with negative dynamics, i.e. the deals that have move to the previous stage within a given period of time. The previous stage is indicated in the row name, whereas the current stage – in the column name.

In the last column, the green squares show the number of successfully closed deals.

In the bottom row, the pink squares show the number of failed deals.

In the lower right square, the light green rectangle shows the total number of deals with positive dynamics, while the light pink rectangle displays the total number of deals with negative dynamics.

Clicking on one of the numbers in this report will open a window with a table. In this table, you will see the list of deals that make up this number (Fig. 234).


Progressing Deals

Total Sales: 11,500.00 Quantity: 15 Entries found: 6 Pages: 1

Name	Contractor	Sales Volume	Responsible	Date created	Source Stage	Target Stage
Cardboard Boxes	PaperBush		Simmons J.	9/27/2019 10:26 AM		Sales proposal
Folding Carton	SNACKZY	200.00	Simmons J.	9/27/2019 10:25 AM		Signing contract
Folding Carton	PaperBush	5,000.00	Simmons J.	9/12/2019 3:41 PM		Initial contact
Cardboard Boxes	SNACKZY	5,000.00	Simmons J.	9/12/2019 3:44 PM		Signing contract
Rigid Boxes	Totoes	300.00	Simmons J.	9/12/2019 3:42 PM		Signing contract
Cardboard Boxes	HANDCRAFTD	1,000.00	Simmons J.	9/12/2019 3:37 PM		Signing contract

Fig. 234. Pop-up window with a list of deals in the deal dynamics report

You can generate reports not only for the whole company, but also for specific groups of sales reps. Before clicking 'Generate', select the following parameters:

- Sales funnel;
- Employee or several employees (you can leave this field empty, then the report will be displayed for all responsible);

- Period for which it is necessary to generate a report (by default, current month).

You can create filters in **Deal Dynamics** report to quickly access a report with certain parameters. For example, a filter for each funnel, a report for the last month, quarter, year compared to the current; reports for specific employees, etc. Filters can be either personal or shared.

Let's create a filter for the **Last Month Deal Dynamics** report for the **Main Sales Funnel**. To do this, enter the necessary parameters (set the period **Previous month**, select a sales funnel) and click on the **Save as Filter** button (Fig. 235).

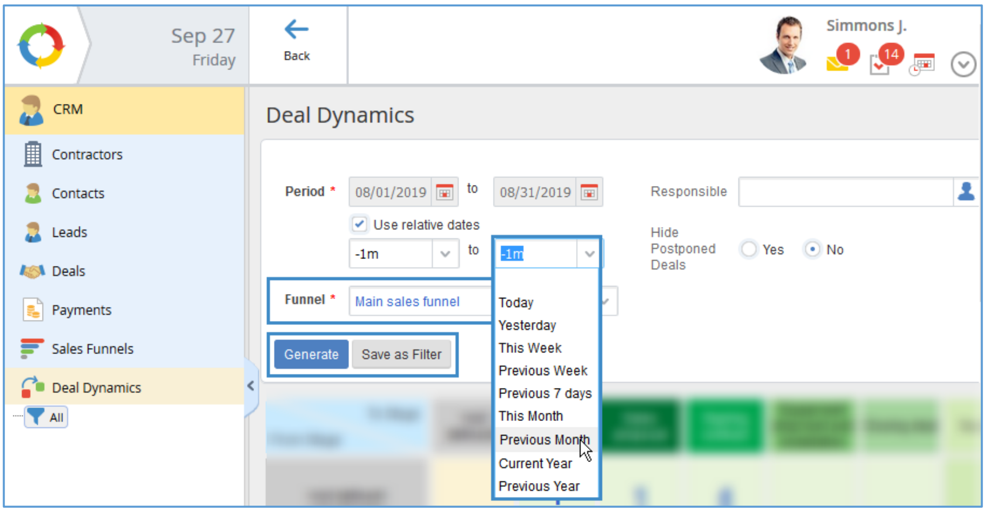


Fig. 235. Creating a filter for a deal dynamics report

Then, in the pop-up window, enter the name of the filter and click **Save** (Fig. 236).

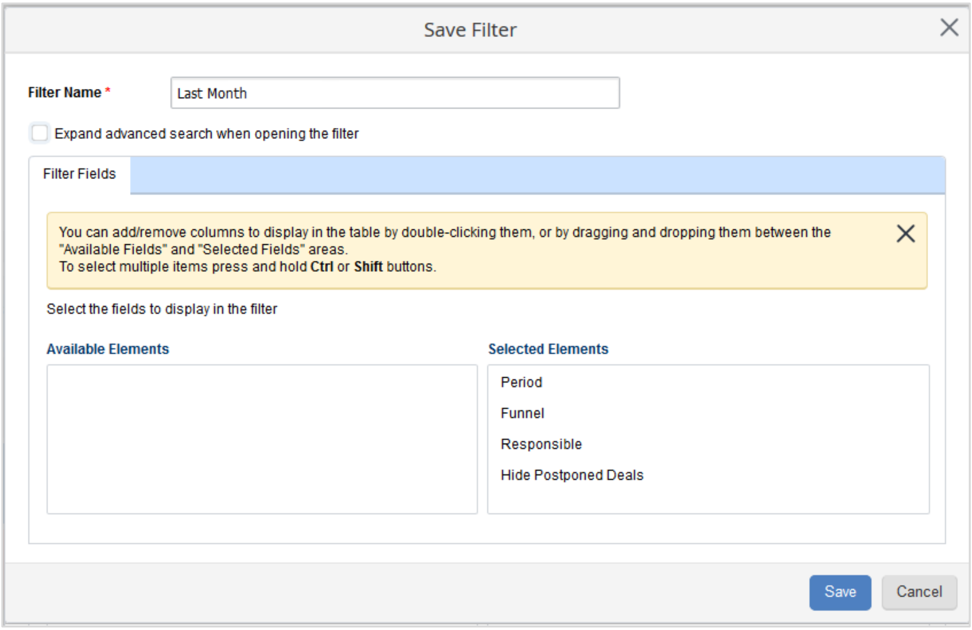


Fig. 236. Saving a filter for a deal dynamics report

The saved filter will be displayed in the **My filters** folder of the filter tree in the sidebar, and will be available only to the person who created it. By clicking on the filter, the user will see the filtered data of the **Deal Dynamics** report (Fig. 237). For more information on filters, see Section 3.4 of this manual.

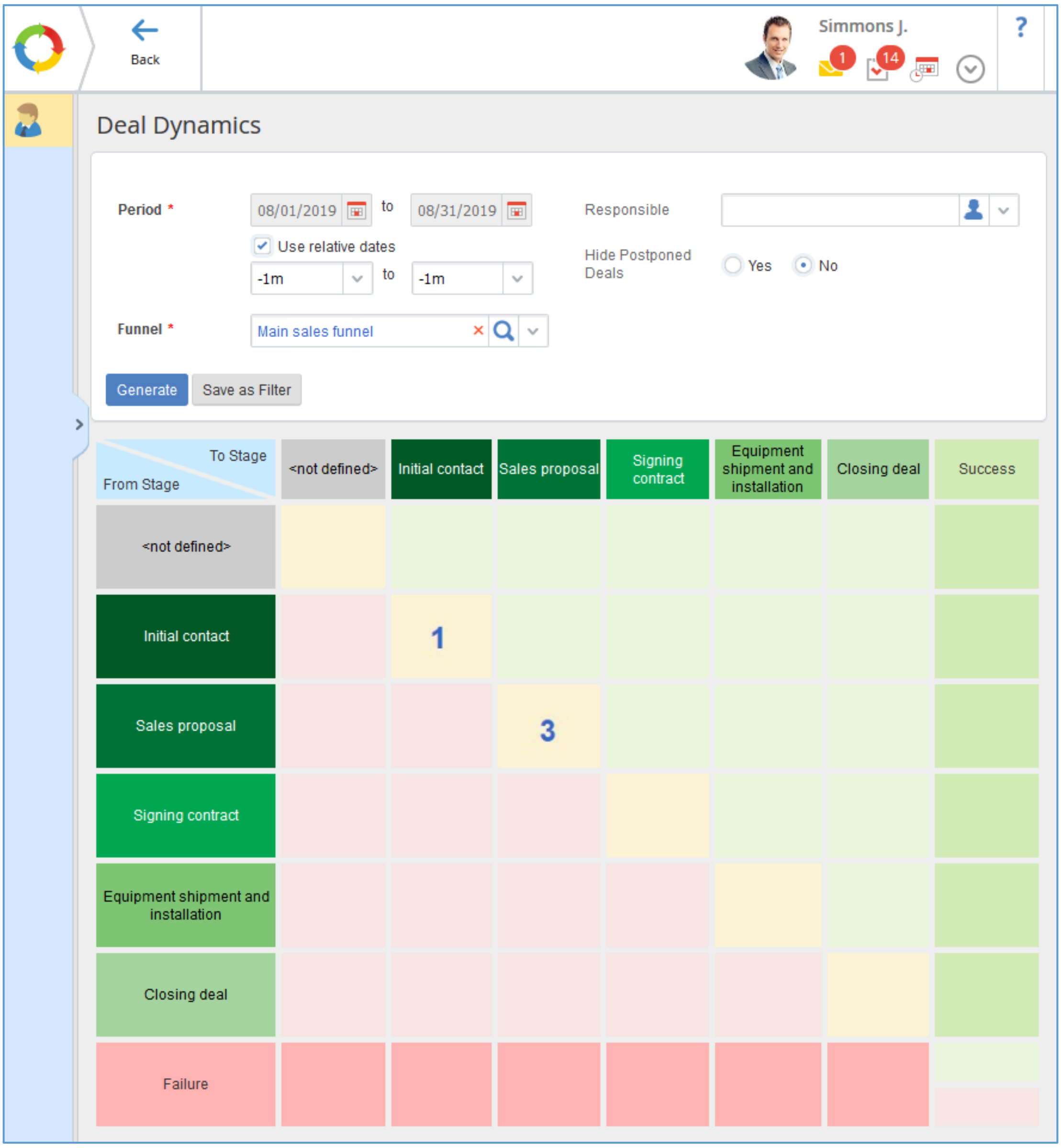


Fig. 237. Last month filter in the deal dynamics report

5.4.3. Payments

Another tool for managing customer relations in **ELMA CRM+** is **Payments**.

Each sales rep create a payments forecast. Together all forecasts make up the financial plan of the company. The Head of the Sales Department is responsible for the financial plan of the entire group and receives all the information on the planned and received payments in the system.

You can work with payments on deals' pages and in the **CRM – Payments** section. This section features all the necessary information about payments: the amount, planned date, and statuses. Only users with special access permissions can view and make changes in this **CRM** section. These access permissions are granted by the system administrator in ***Administration – CRM Settings – Access Permissions – Access to the Payments section*** (Fig. 201).

Let's take a closer look at how a sales rep works with payments. First, the representative must create a payment on a deal page. To do so, click **Add Payment,** fill in the fields in the pop-up and click **Add** (Fig. 238).

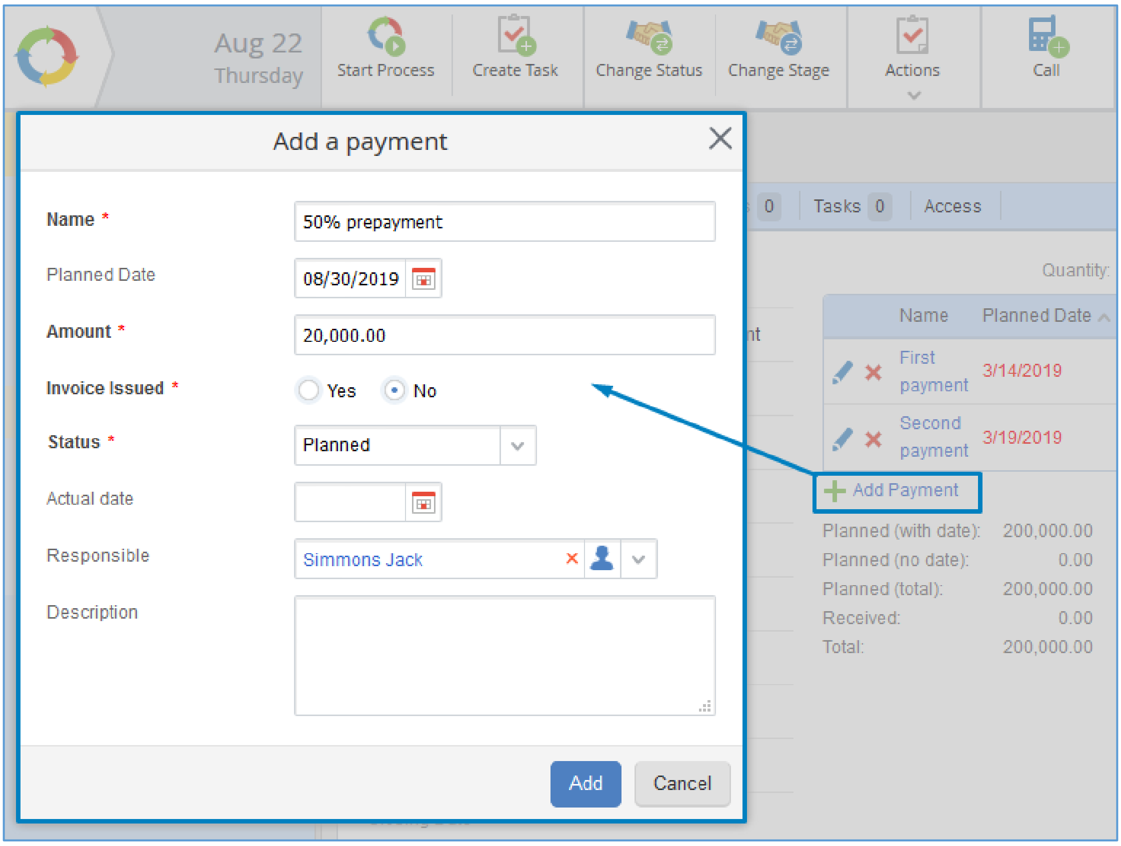


Fig. 238. Creating a payment on a deal page

If a deal has expected payments, the **Sales volume** of this deal will be replaced by the sum of the expected payments. When creating the first payment, the sales rep will see a notification about the change in sales volume (Fig. 239).

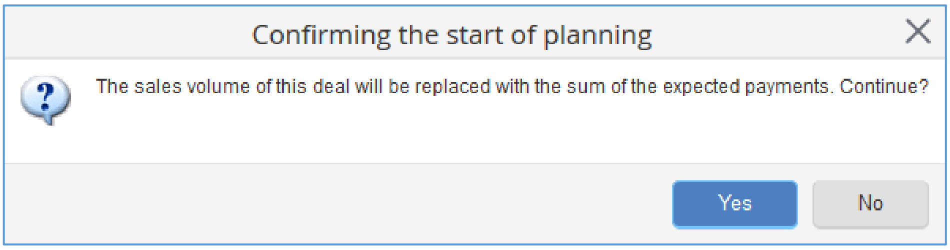


Fig. 239. Confirm that you changed the sales volume of a deal

There can be many payments within a deal – all of them will be displayed in a special area of the deal page (Fig. 240). The deal sales volume will always be equal to the sum of all planned payments.

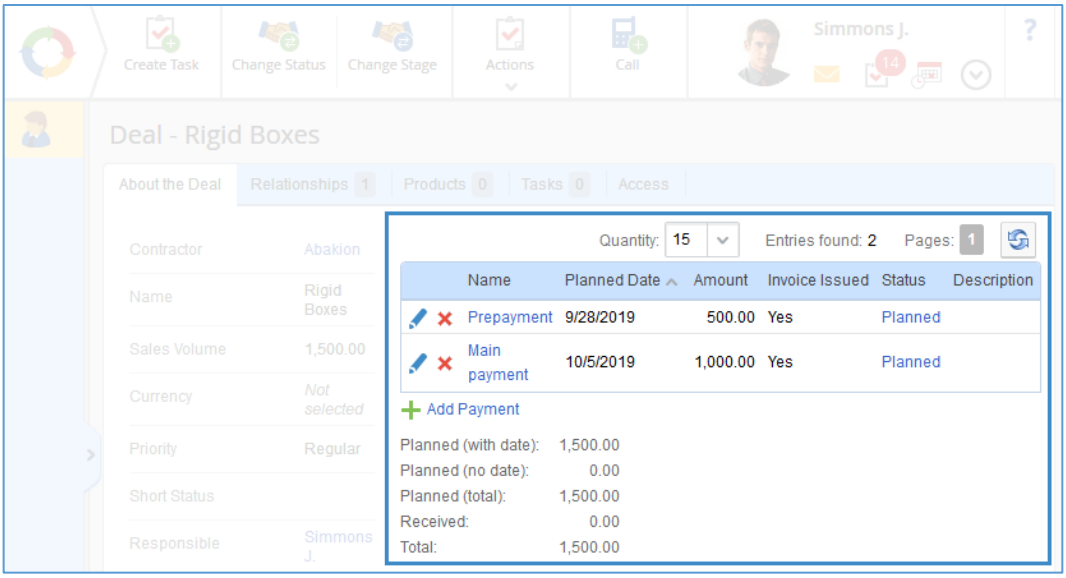


Fig. 241. Payments section of a deal page

After that, the sales rep can make changes to the payments. For example, after issuing an invoice, they can set the **Invoice issued** parameter (Fig. 242); after receiving money, set the **Received** status (Fig. 243); and if a payment was canceled, set the **Canceled** status and leave a comment.

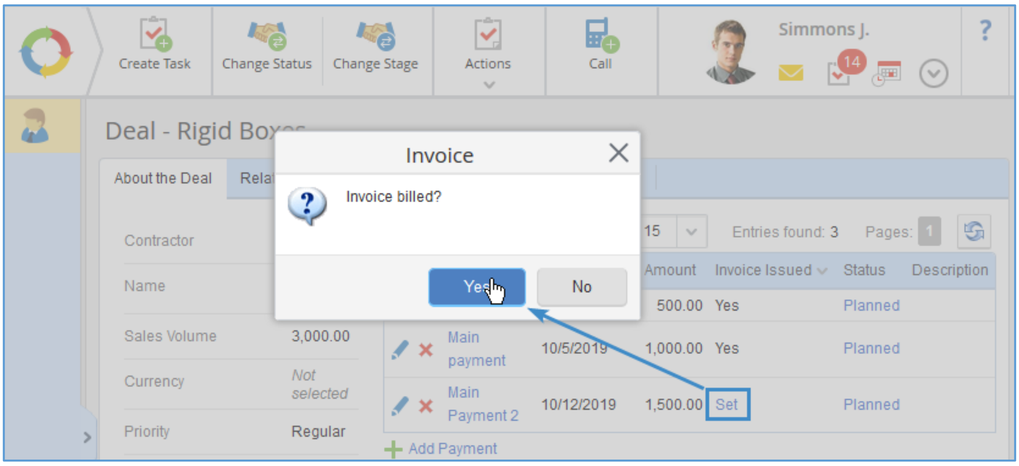


Fig. 242. Setting the Invoice Issued parameter

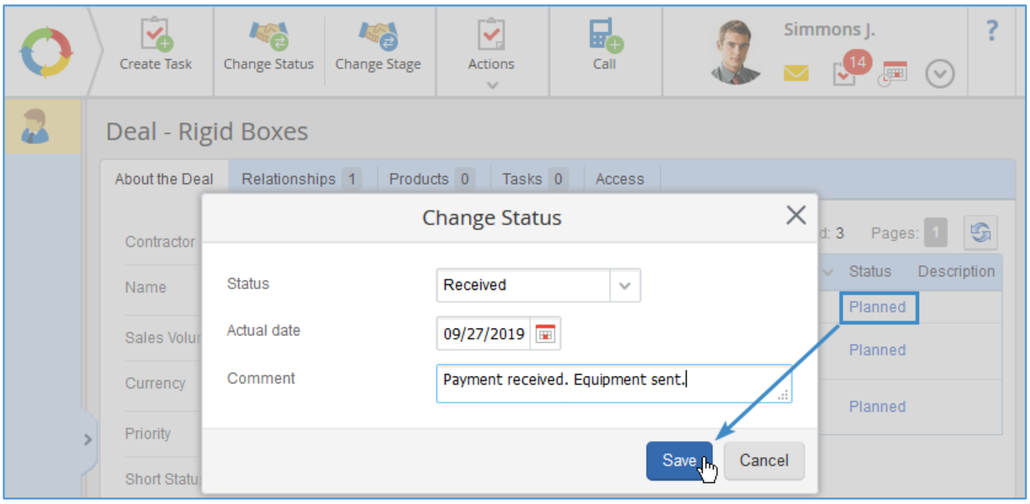


Fig. 243. Changing a payment status

You can also edit other information about a payment: **Amount**, **Name**, **Description**. To do so, click the next to a payment's name (Fig. 244).

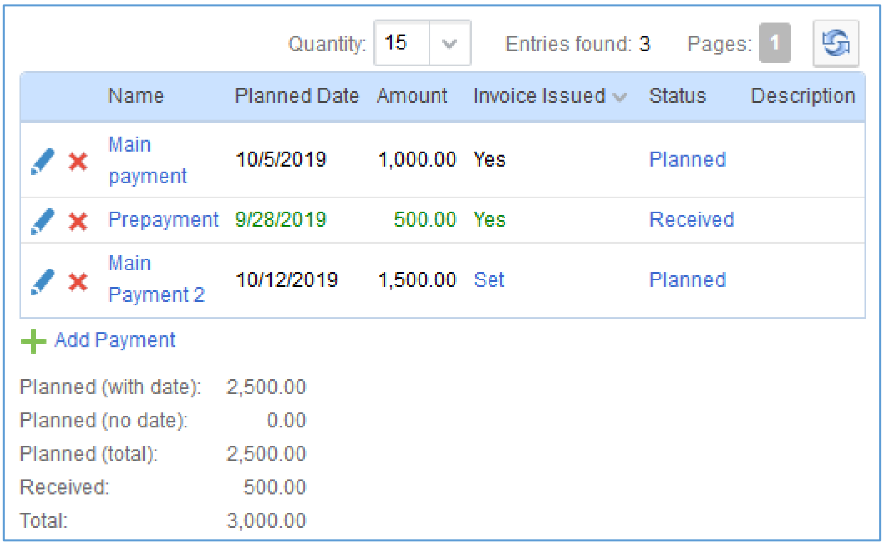


Fig. 244. Payments with different statuses

Click on a payment's name to open its page (Fig. 245).

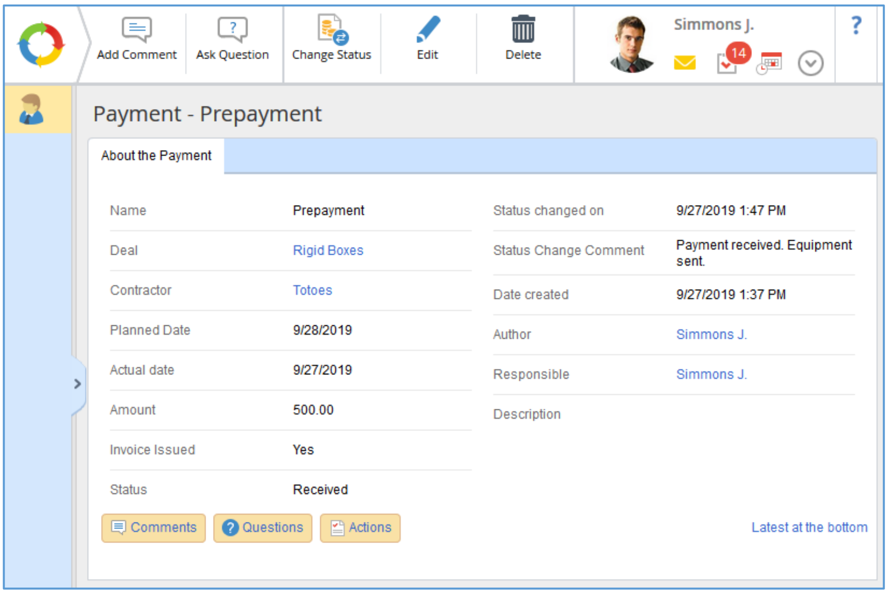


Fig. 245. Payment page

You can use the buttons in the top toolbar to:

- Add comments;
- Ask questions;
- Change the payment's status;
- Edit the payment (Only if you have access permissions. By default, only the **Author**, **Responsible**, and users with the full access to **CRM** can edit payments);

- Delete the payment (Only if you have permissions configured in ***Administration – CRM Settings – Access Permissions****)* (Fig. 201).

You can also manage payments in the **Payments** section (Fig. 246).

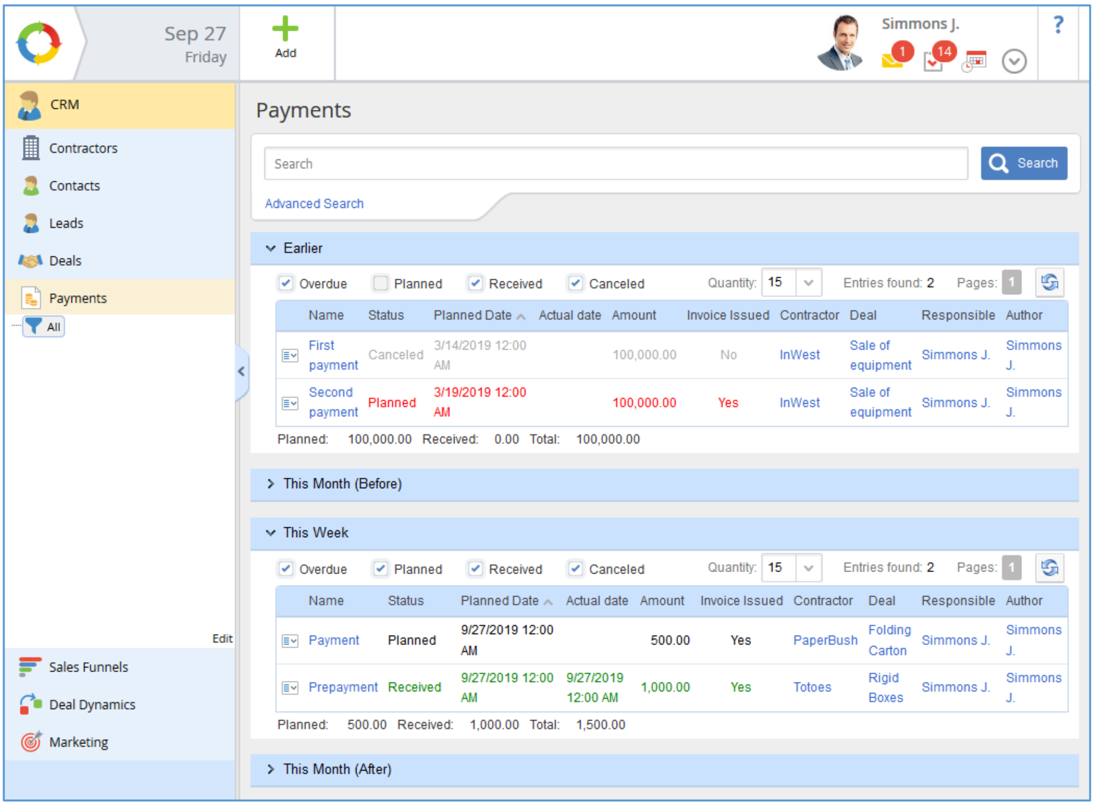


Fig. 246. Payments section

Here you can create payments by clicking the **Add** button in the top toolbar (Fig. 246). The **Add a payment** window will pop up; it's the same as in Fig. 238 except that it has an additional required field – **Deal**. To edit or add comments to a payment, go to the payment page by clicking on its name or the context menu.

The **Payments** section features information on planned payments under all deals. Only users with special access permissions can view and edit this section (these permissions are configured in ***Administration – CRM Settings – Access Permissions****).* The section is useful both for managers to control sales and for sales reps to perform everyday tasks.

To make financial data analysis more convenient, payments in the **Payments** section are grouped by certain periods. You can find them under the following panels:

- **Earlier** – list of payments made in previous months;
- **This Month (Before)** – list of payments whose planned dates fall on the previous weeks of the current month;
- **This Week –** list of payments whose planned dates fall on the current week;

- **This Month (After)** – list of payments whose planned dates fall on the following weeks of the current month;
- **Next –** list of payments whose planned dates fall on next months.

You can configure lists of payments under each panel by checking required status boxes (Fig. 247). There are the following payment statuses in ELMA:

- **Overdue** – payment was not made by the planned date;
- **Planned** – planned payments;
- **Received** – received payments;
- **Canceled –** canceled payments.

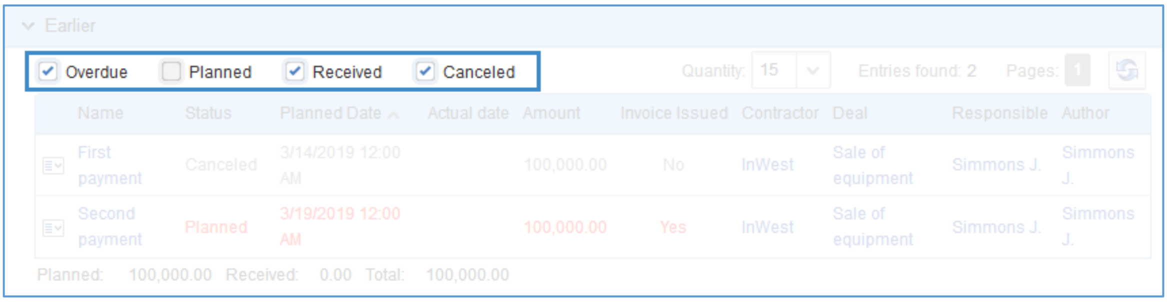


Fig. 247. Payment statuses

In this section, you can also configure filters to quickly access payments according to specified parameters. Filters are created in the same way as in other ELMA sections (see Section 3.4.1).

Payments can also be displayed in the **Payments** portlet. Refer to Section 3.5.2 to learn how to add a portlet. Here you can see an example of this portlet:

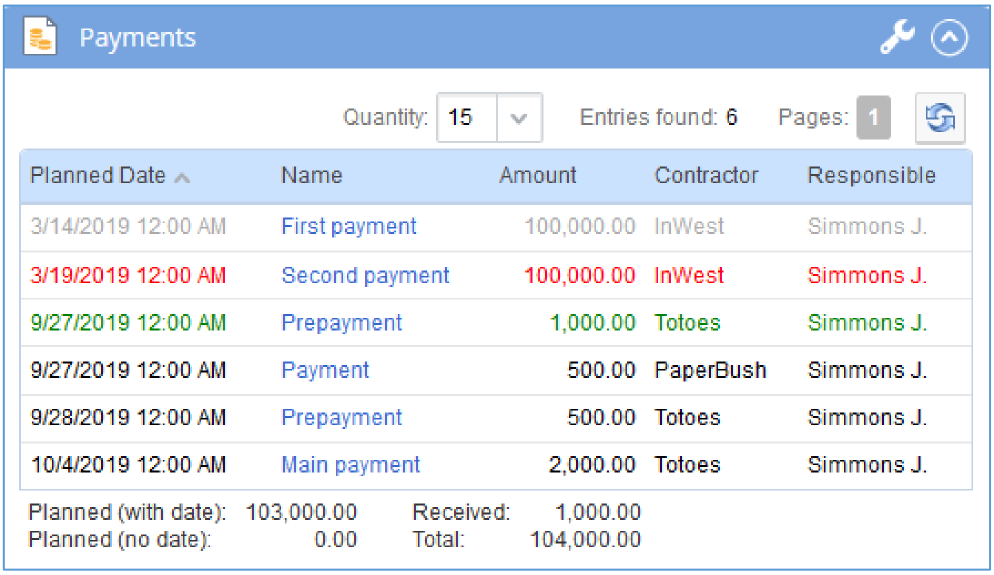


Fig. 248. Payments portlet

The **Payments** portlet has the following settings (Fig. 249):

- **Filter to display** – you can create a filter in the **Payments** section and the portlet will display the filtered payments;
- **Show only mine** – set this parameter to **Yes** if you want to display only those payments for which the current user is responsible. **No** – all users,
- **Show by periods** – defines how payments will be displayed. **Yes** – they will be grouped by periods (as in the **Payments** section); **No –** they will be shown as a list (Fig. 248).

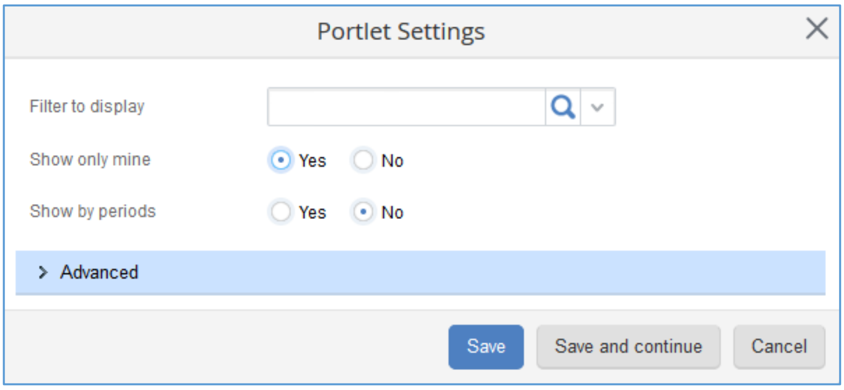


Fig. 249. Payments portlet settings

It is also possible to create deal payments within business processes using scripts written in C# or context variables of the **Payment (Object)** type.

5.4.4. Filters

ELMA filters allow you to quickly find objects according to specified parameters. Earlier we considered how to create filters for contractors (see Section 3.4.1). You can create filters in any section of **CRM** except for **Sales Funnel**. Note that you can create filters using advanced or EQL-search (see Section 3.4.1.1), which allows you to make filters with complex logic. For example, select contractors from multiple regions for one responsible person, select all undistributed potential customers, etc.

Why to use filters:

- quick objects search in different system sections;
- display of portlets on the main page with up-to-date information that requires processing;
- exporting to Excel lists of system objects with certain parameters;
- analysis and control of user performance, etc.

For more details on working with filters, see Section 3.4.1 of this manual.

Using filters, you can organize a convenient display of data for users. Let's configure several filters:

- **Unallocated leads** – this filter can be used by the head of the sales department to distribute leads among the sales department employees;
- **My new leads –** this filter displays new prosper customers assigned to an employee;
- **Deals in work of the Delivery and Installation type** – this filter will display all current deals of the Delivery and Installation type;
- **Unsuccessful deals (for the last 3 months)** – this filter is for the deals that fell through. Manager will analyze this data

Configure all the filters under the Administrator account since the Administrator has permissions to create shared filters. Let's create a few filter using the parameters in Table 4:

Table 4. Data for creating filters

Filter Name	EQL-query/advanced search parameters
Unallocated leads	«Status = 'New' AND Responsible is NULL»
My new leads	«Status = 'New' AND Responsible = CurrentUser()»
Deals in work with the Delivery and Installation type	Status – Active Deal type – Equipment Delivery and Installation
Unsuccessful deals (for the last 3 months)	«SaleStatus = 'NegativeClosed' AND EndDate in RelativeDateTime('-3м', '0м')»

You can configure the data display table, if necessary. Read this Help article to find out more.

Move all the created filters to the **Shared Filters** folder (see Section 3.4.3). Once you've done it, you will see the in the filter tree in the sidebar (Fig. 250):

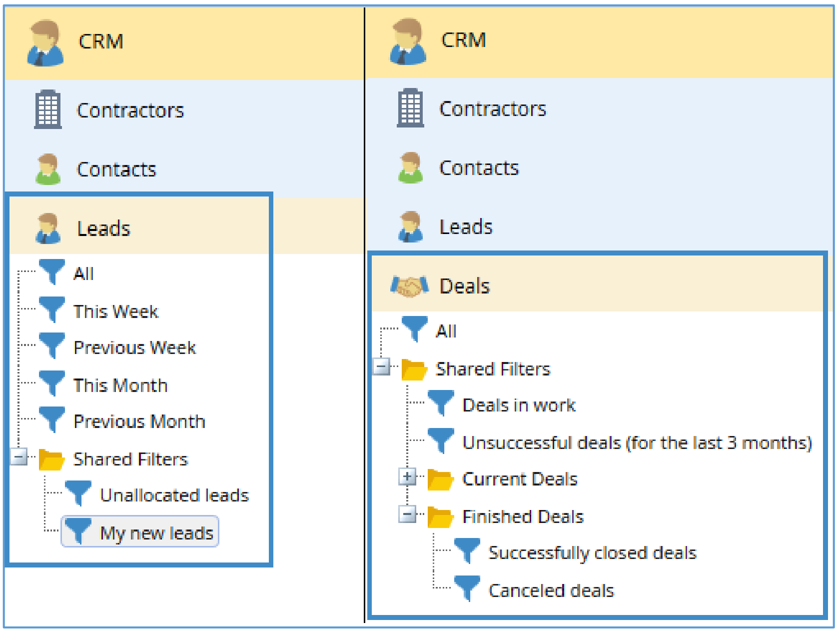


Fig. 250. Custom filters in the Leads and Deals sections

In Section 5.5, we will consider how to use these filters.

5.5. Use Cases

Before using the set up sales funnel, let's configure a few more settings.

First, create users and assign them to these positions: sales department employee (2 users), head of the sales department, accountant, chief technology officer, head of the Logistics department, CCO (Fig. 251).

Account	User	Job Positions
herbie	Herbie Dana	Department Employee: Accounting Department
sonny	Sonny Glen	Chief Technology Officer
laci	Laci Ginnie	Department Head: Logistics Department
Nathan Cortney	Cortney Nathan	Chief Commercial Officer
admin	Simmons Jack	CEO
Wyatt	Violet Wyatt	Department Employee: Sales Department
bernetta	Bernetta Johnnie	Department Employee: Sales Department
brody	Brody Gabe	Department Head: Sales Department

Fig. 251. Creating a list of users

Then add Johnnie Bernetta to the 'Sales Southeast' group and Violet Wyatt to the 'Sales Southwest' group. Add the heads of sales and logistics departments, the CEO and CCO, and the CTO to the 'Managers' group.

After that create several leads without **Responsible**, but specify the **Region Group** – Southeast and Southwest. Refer to Section 5.1 to find out how to do that.

Now log in to the system under the head of the sales department account to distribute leads between sales reps. Go to **CRM – Leads**, select the filter **Unallocated leads**. Check the lead with the 'Southeast' region group, click on the **Selected** button in the top toolbar, choose **Assign the responsible for the selected leads** (Fig. 252). In the window that appears, select Johnnie Bernetta and click **Set.**

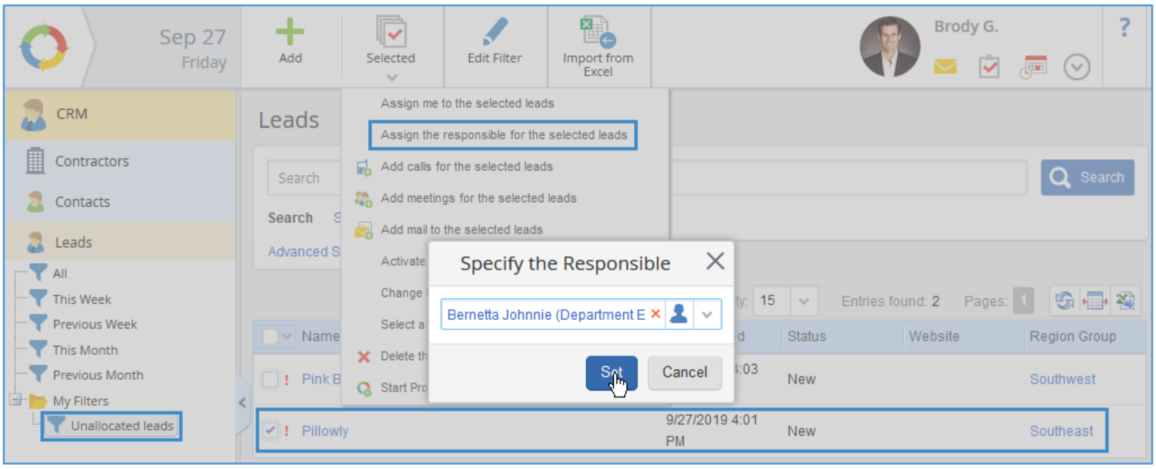


Fig. 252. Assign users who are responsible for leads

In the same fashion, assign the lead with the ‘Southwest’ region group to Violet Wyatt.

Next, log into the system under Violet Wyatt. In **CRM** – **Leads** (Fig. 183), select a lead with the **New** status. Let’s assume that the work with the lead is done. Now convert it to a **Contractor** and create a **Deal**. To do this, click **Actions** in the top toolbar of the lead page and select **Convert Lead** (Fig. 185).

This will start the conversion wizard, which consists of four steps: **Conversion Parameters**, **About the Contractor**, **Contacts**, and **Deal**. Switch between steps by clicking the **1, 2, 3, 4** buttons in the top toolbar. Let’s take a closer look at each step.

Step 1. The **Conversion Parameters** page has 3 sections (Fig. 253):

Type of New Contractor – choose a contractor type by selecting one of the parameters: **Company** or **Individual**.

Type of the Object to Create – choose an object type by selecting one of the parameters: **Deal**, **Meeting**, **Mail**, **Call** or **Do not create**. If you select the **Do not create** option, step 4 will be hidden and no object will be created apart from a contractor and contact.

Comment – leave a comment in relation to your conversion parameters.

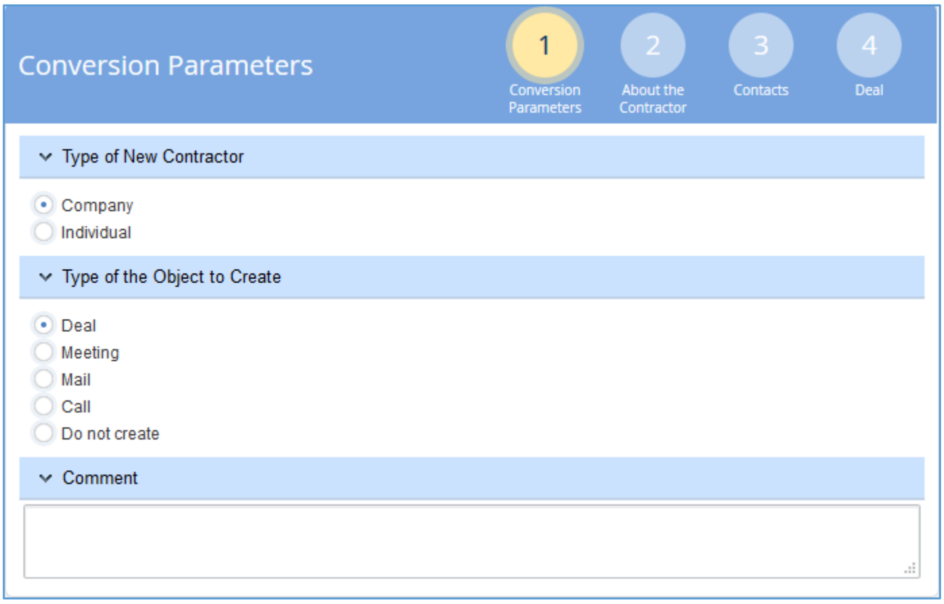


Fig. 253. Step 1. Conversion parameters

Step 2. The **About the Contractor** page (Fig. 254) is the same as the **Create New Contractor** page. By default, the fields on the page are pre-filled with the values from the lead page. If necessary, you can fill in the empty fields, too.

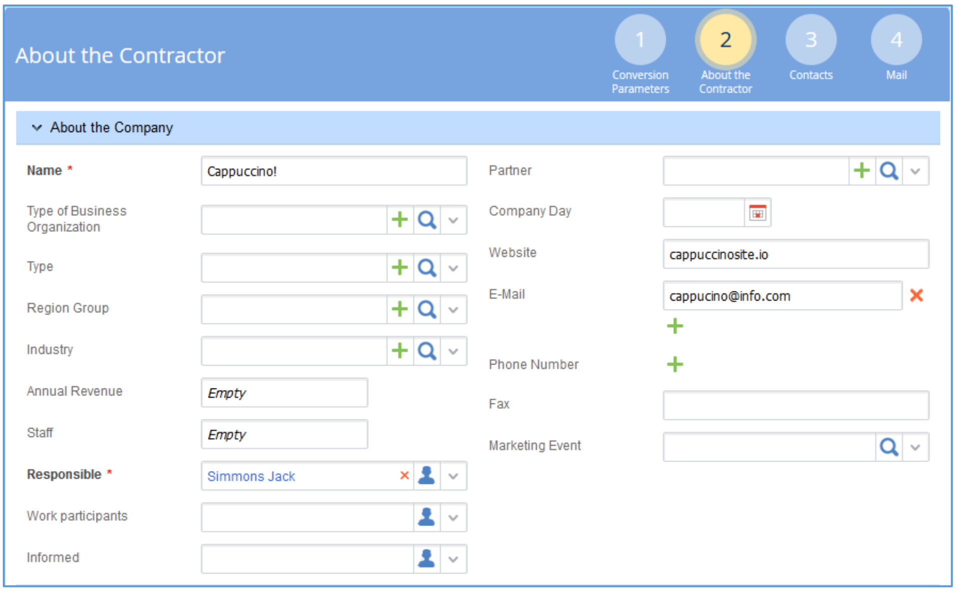


Fig. 254. Step 2. About the Contractor

Step 3. The **Contacts** page (Fig. 255) has information about the contacts from the lead page.

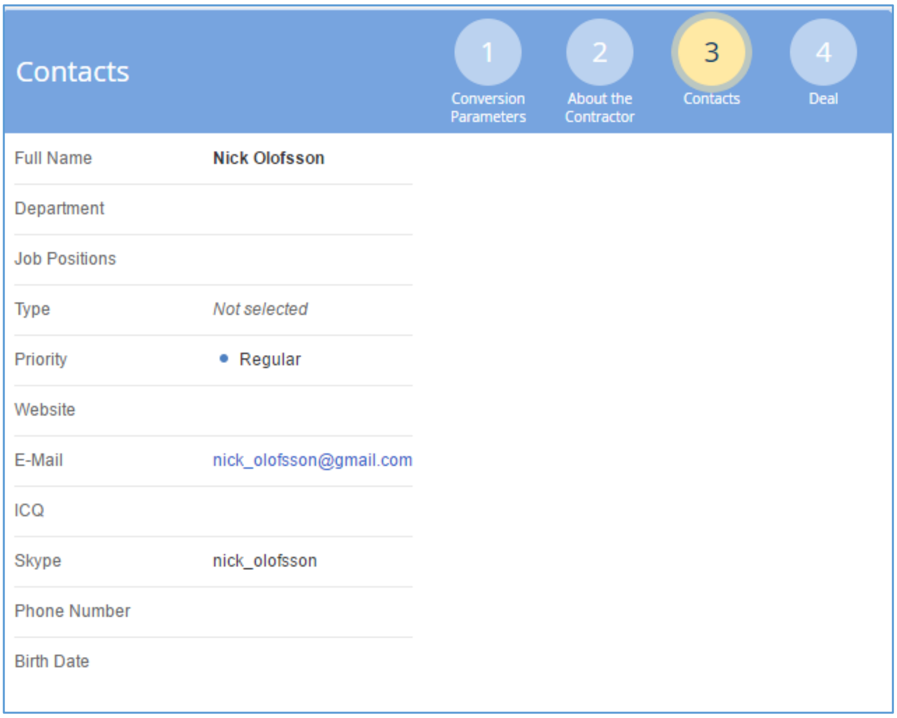


Fig. 255. Step 3. Contacts

Step 4. Depending on the relationship selected in Step 1, the system will offer to create a call, meeting, mail or a deal. In this example, let's create a deal (Fig. 256).

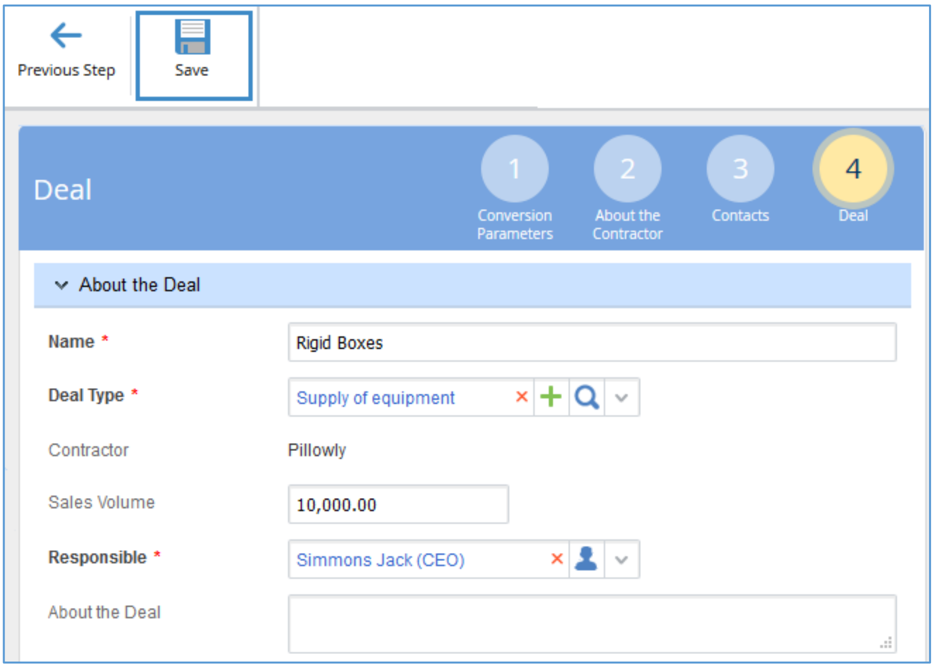


Fig. 256. Step 4. Deal

Click **Save** in the top toolbar of the conversion wizard in order to finish the conversion (Fig. 256).

Now let's go through the deal stages. To change a deal stage, click **Change Stage** in the top toolbar of the deal page (Fig. 257).

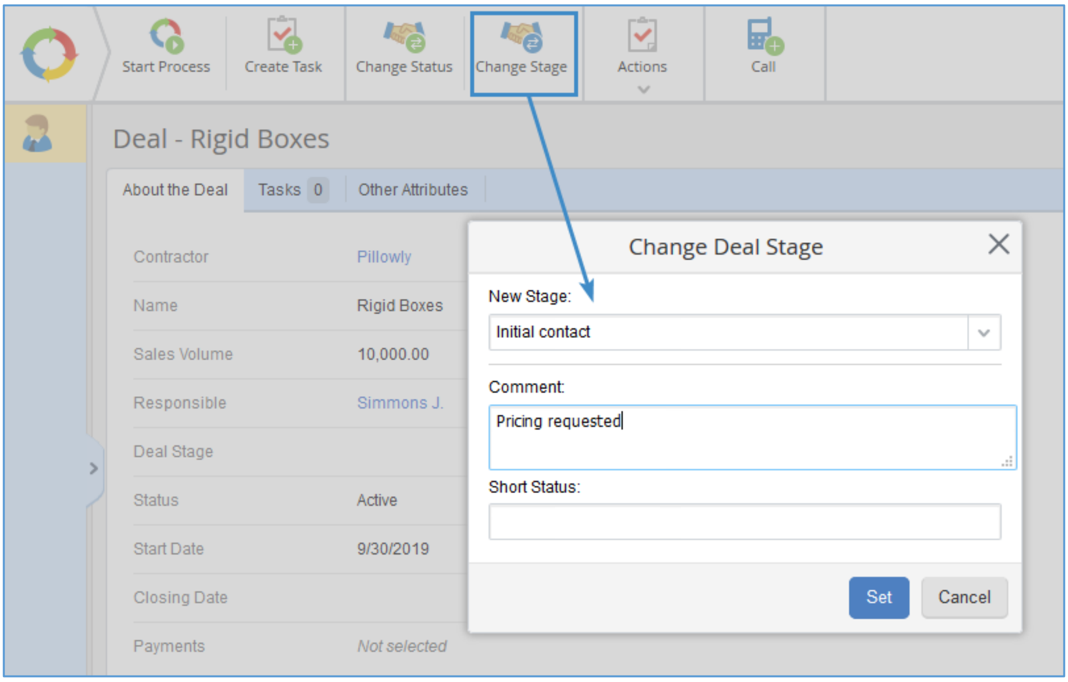


Fig. 257. Changing a deal stage

In the pop-up, select the **Initial Contact** stage and add a comment. You can track the history of changes in the history section (Fig. 258).

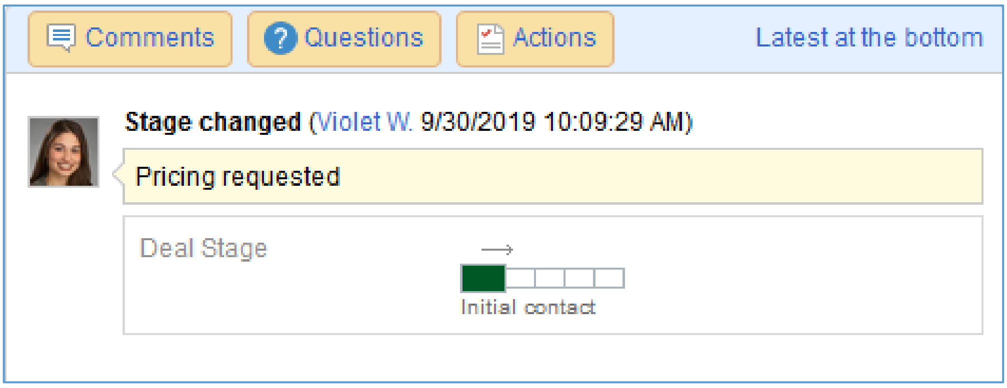


Fig. 258. Deal history

Next, change the stage to **Sales Proposal**. Once you move to this stage, the 'Sales Proposal Approval' process will automatically start and the responsible user will be assigned the first task – **Make sales proposal** (Fig. 259).

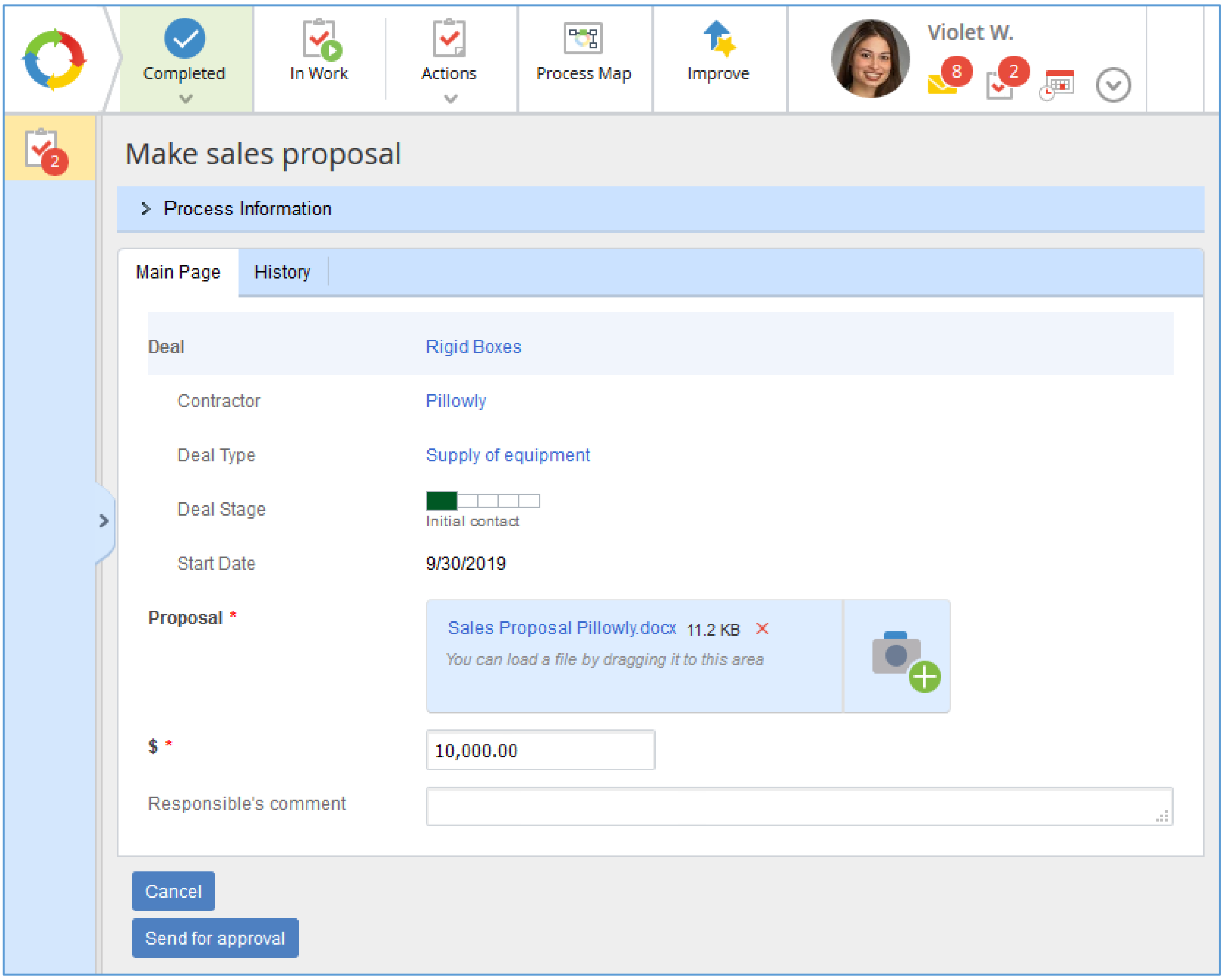


Fig. 259. Make sales proposal task

On the task page, click **Cancel** if you don't want to change the deal stage and the business process will be finished.

Attach the **Sales Proposal** and click **Send for Approval** to complete the task. The deal will automatically move to the new stage.

You can track the business process status in the **Process Monitor** (for more details, read [this Help page](#)) or on the **Task** tab of the deal page (Fig. 260).

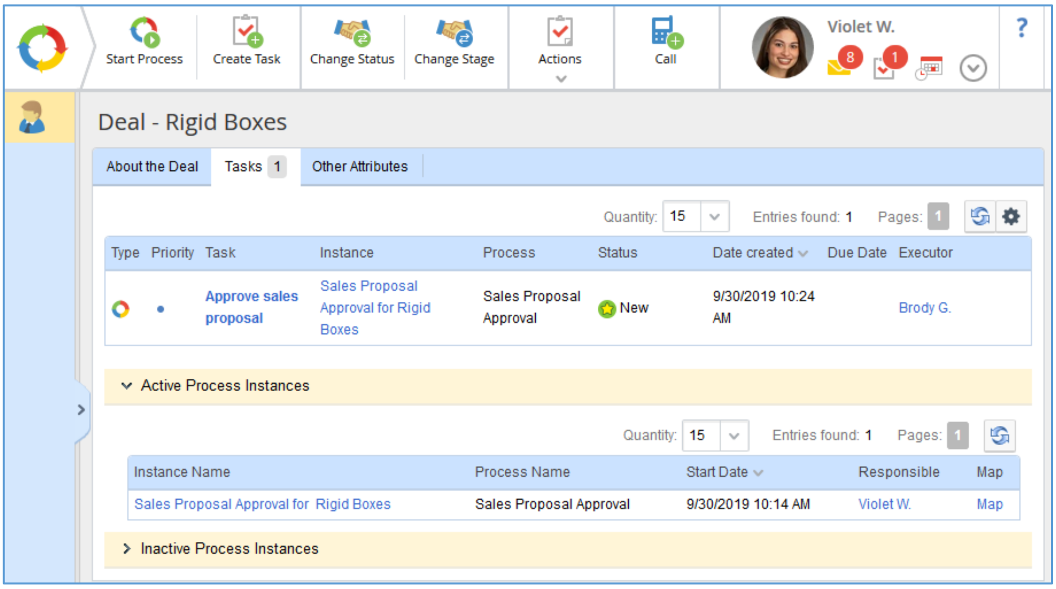


Fig. 260. Task tab on the deal page

The next business process task is to **Approve sales proposal**. Open the task as the Head of the Sales Department (Fig. 261). He or she can either approve or reject the proposal. Click on the attached file to download or view it in the browser (Fig. 261).

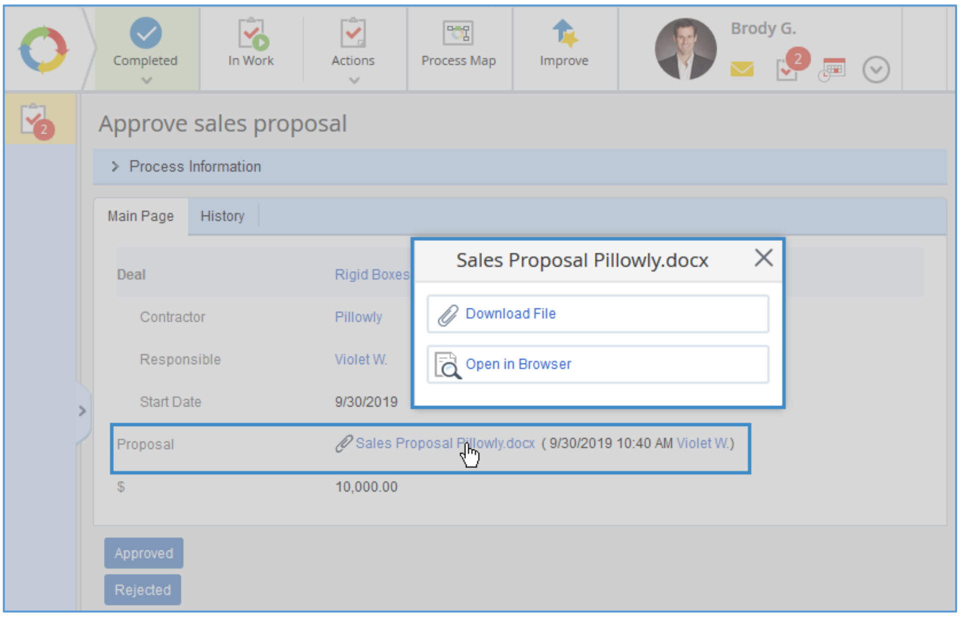


Fig. 261. Approve sales proposal task

Logged as the Head of the Sales Department, complete the ‘CO Approval’ task by clicking **Reject**.

The rest of the tasks in this business process are the same – only the executors’ comments will change.

Once the Sales Department Head has rejected the proposal, the process returns to the initiator who is assigned the ‘Make changes to proposal’ task (Fig. 262). You can attach the corrected file to the task form taking into account the approvers’ comments. Besides, you can add some comments yourself, too.

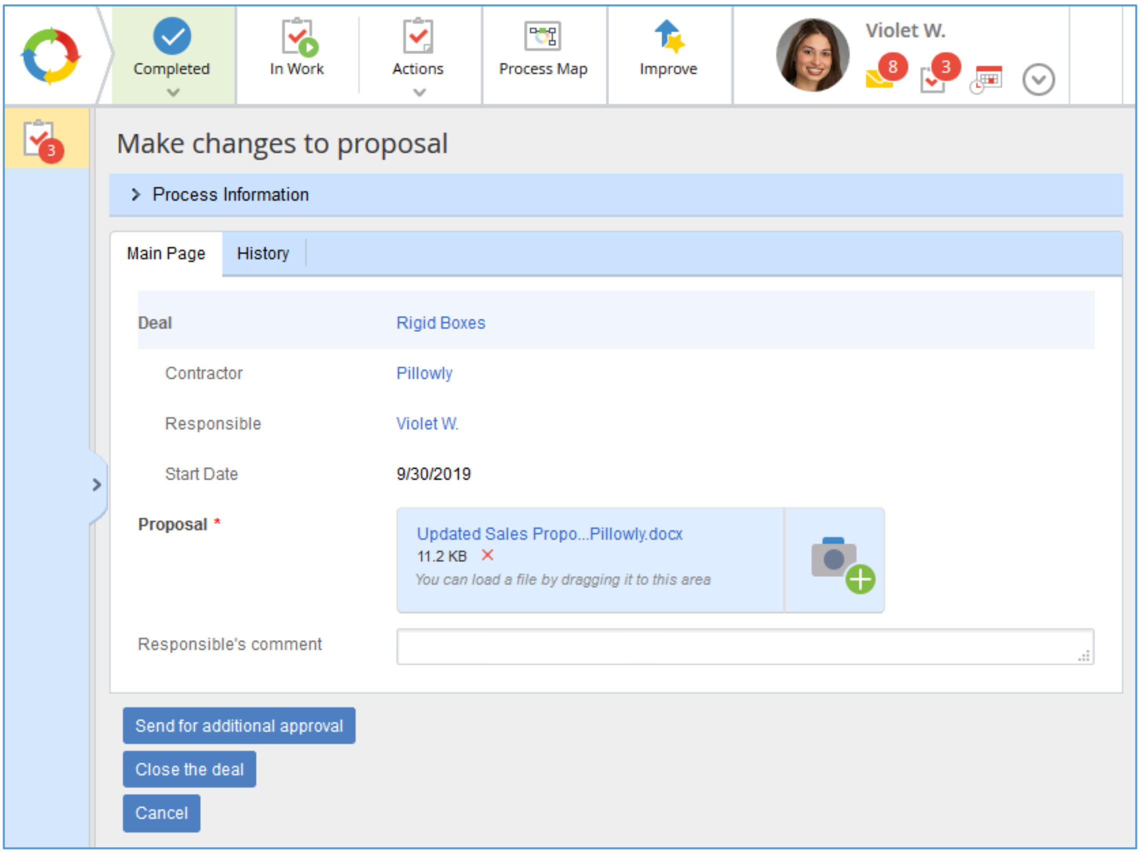


Fig. 262. Commercial Offer Correction

Click **Send for Additional Approval** on the task page. The task will be sent to the sales department head again.

Now log into the system as the Sales Department Head and complete the new task by clicking **Approve**. Then, log into the system under the accounts of all the process participants and approve the sales proposal.

After all the approval tasks are completed, the initiator will be assigned to the ‘Sales Proposal Approved’ task (Fig. 263) where all the approvers’ comments will be displayed. Now it’s time to send the approved sales proposal to the customer. Complete the task by clicking **Sent.**

If you change the **Date of control** property by setting the date greater than the current one, the next task in the process will be assigned to the executor on the specified date. The process uses a timer that pauses the execution until the date specified in the **Date of control** property.

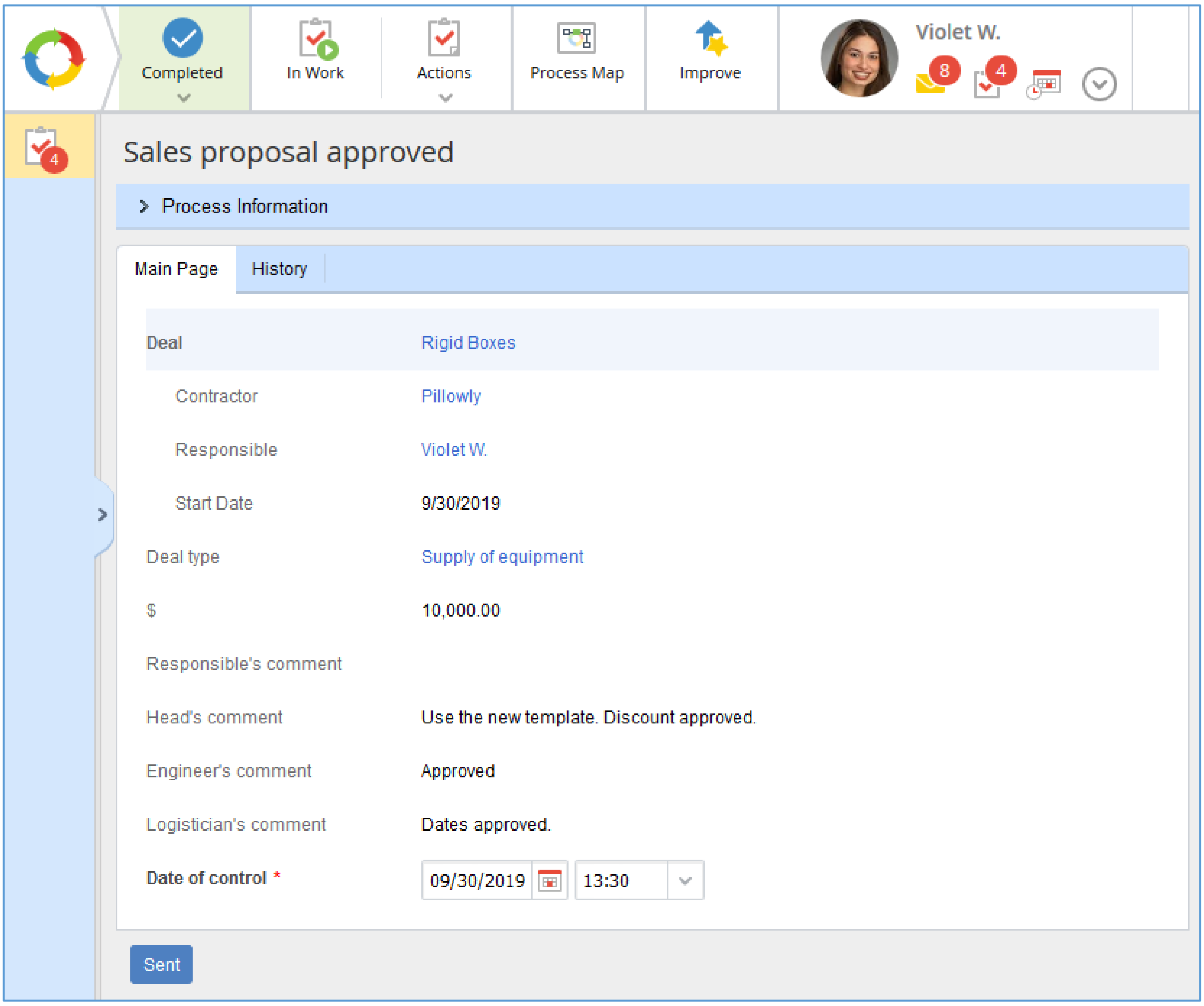


Fig. 263. Sales proposal approved task

The next task that the initiator gets is ‘Send proposal to customer’ (Fig. 264). You can complete the task by clicking on one of the five transition buttons:

- **Accepted** – click to finish business process since the proposal is agreed on both sides. Sales reps continue working on the deal;
- **Cancel** – process finishes and the deal returns to the **Initial Contact** stage.
- **Cancel and close the deal (Failure)** – enter a comment on closing the deal, then the process will finish and the deal will be assigned the **Closed (Failure)** status;
- **Changes Required** – after discussing the details of the deal with the customer, it may be necessary to make another change to the proposal, the process will again return to the **Make changes to proposal** task which is in the initiator’s swimlane.
- **Defer task** – this option sets a timer and the task will be postponed until the time specified in the **Control Date** field;

Let’s complete the task by clicking **Accepted** so that we can continue working with the deal.

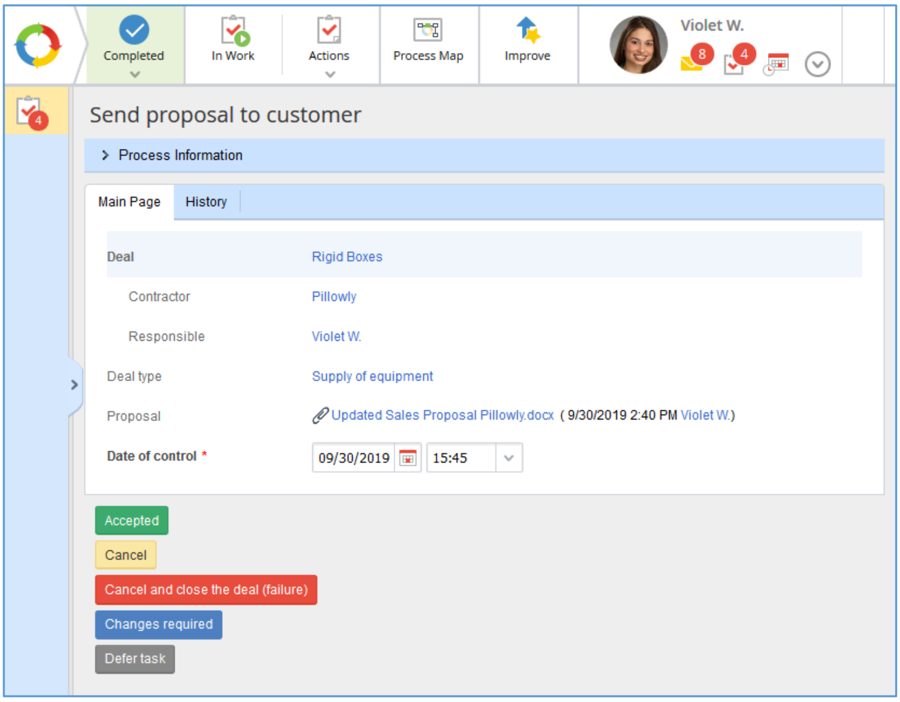


Fig. 264. Send proposal to customer task

Once the proposal is accepted and business process finishes, the deal will go to the **Sales Proposal** stage. After that, you can change the stage to **Signing the Contact** without starting a business process.

At this stage, let's add payments to the deal (Fig. 238). Divide the payments into 2 parts.

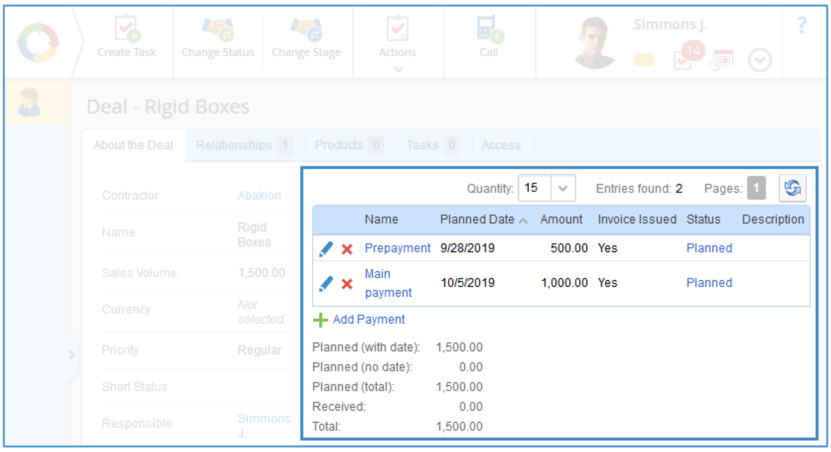


Fig. 265. Deal payments

Let's assume that the contract is signed, now we can change the deal stage to **Equipment shipment and installation** and note that the payment has been received. Set the received status in the **Payments** section (Fig. 243).

Log into the system under the Head of the Sales Department. In **CRM – Payments**, he can see planned and received payments on this deal (Fig. 266), as well as payments on other deals.

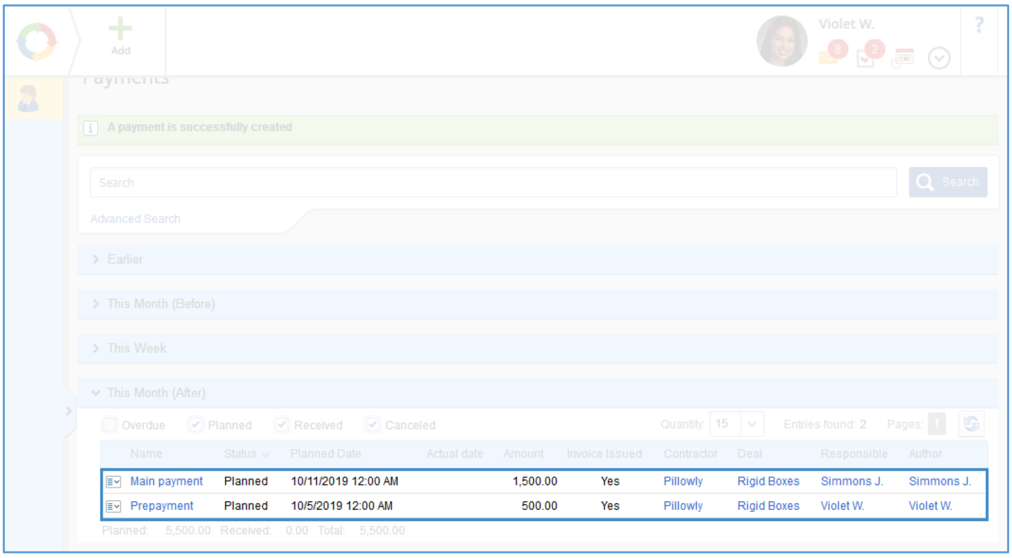


Fig. 266. Payments on the deal in the Payments section

If the Sales Head clicks on a payment, the deal page opens where all the information about the deal is stored: dates, comments, stage transitions, active and inactive tasks, etc. Besides, here he can ask questions or create tasks connected to this deal.

As a rule, closing a deal requires starting a process in which specific documents will confirm that the deal is closed and responsible will approve it. This process is modeled in the same way as the process described in Section 5.3. Note that we will change the stage manually.

Log into the system as Violet Wyatt, go to the deal page and change the stage to **Closing the deal.**

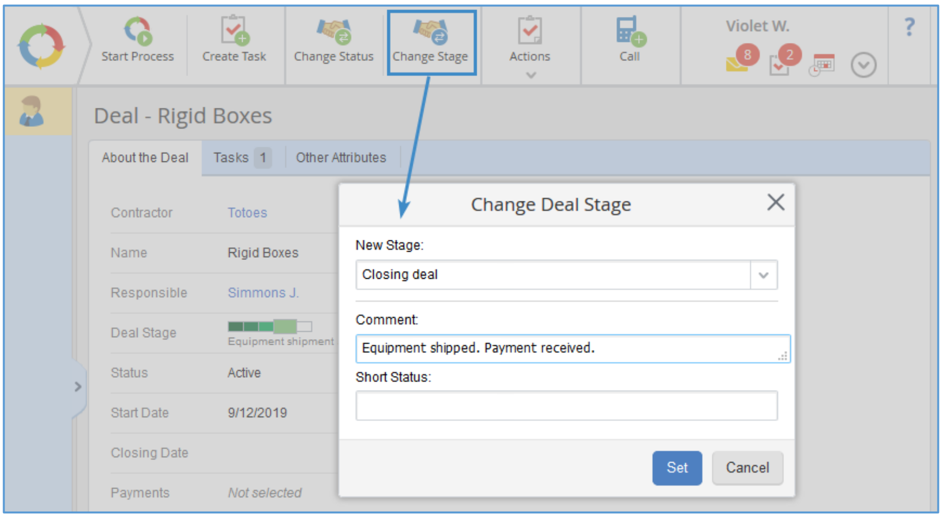


Fig. 267. Closing the deal stage

All the information about the deal history, comments, questions, payments, and tasks are on one deal page.

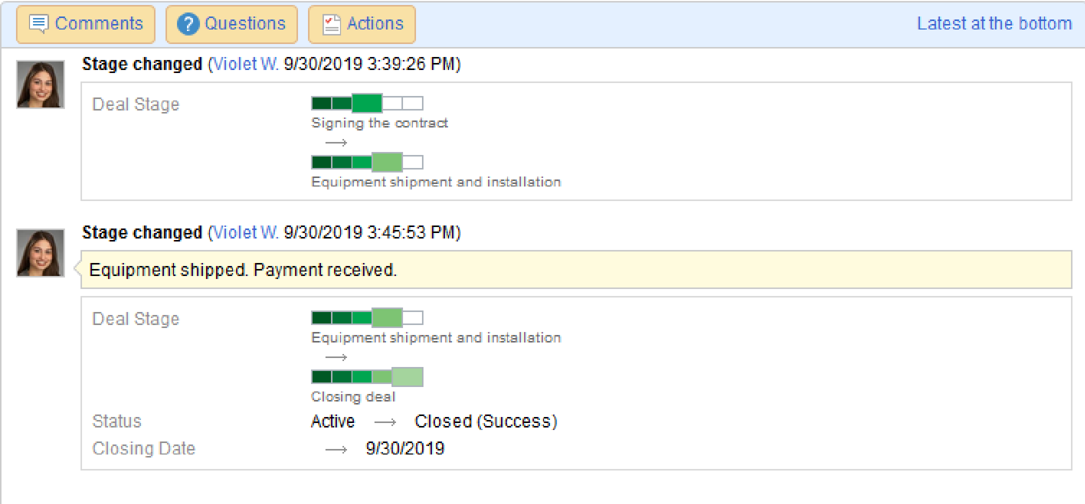


Fig. 268. Deal history

You can go to a deal page from a contractor page on the **Deals** tab (Fig. 269). The deal will also be displayed in **Sales Funnels** reports (Fig. 231) and **Deal dynamics** (Fig. 233).

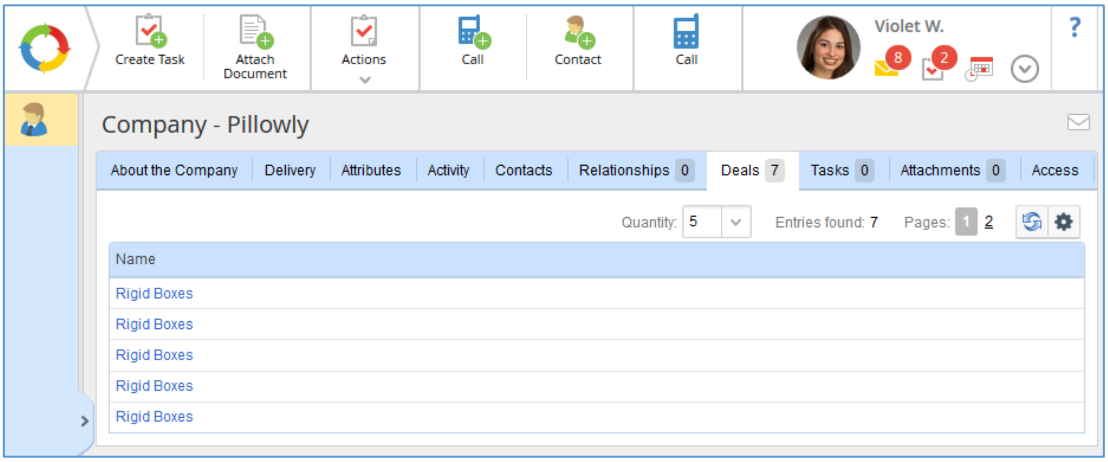


Fig. 269. Deals tab on a contractor page

Chapter 6. Integration with IP telephony

IP-telephony is a communication tool that utilizes the Internet for data transmission, namely, IP protocols. The idea behind IP-telephony is to convert analog voice signals into digital data. When this data reaches the addressee, it's converted back to voice signals.

IP-telephony is convenient for businesses: it allows you to reduce communication costs, in particular, long-distance and international calls.

You can integrate **ELMA CRM+** with IP-telephony systems, which allows you to automate routine user operations like adding data about calls.

ELMA CRM+ can be integrated with three IP telephony providers: Asterisk, Oktell and Infratel.

There are 3 use cases how to use ELMA integrated with IP telephony:

- outgoing calls;
- incoming calls;
- customer service center.

Below you will find out how to use Asterisk, ELMA Agent and the X-Lite softphone (freeware voice-over-IP) in ELMA.

Visit this Help page for more details on how to integrate **ELMA CRM+** with IP telephony.

6.1. Outgoing Calls

First of all, make sure that the telephony module is configured correctly (there is a connection with the provider), the X-Lite softphone and ELMA Agent are running.

You can make an outgoing call from **Contractor** (Fig. 270), **Lead** or **Contact** pages.

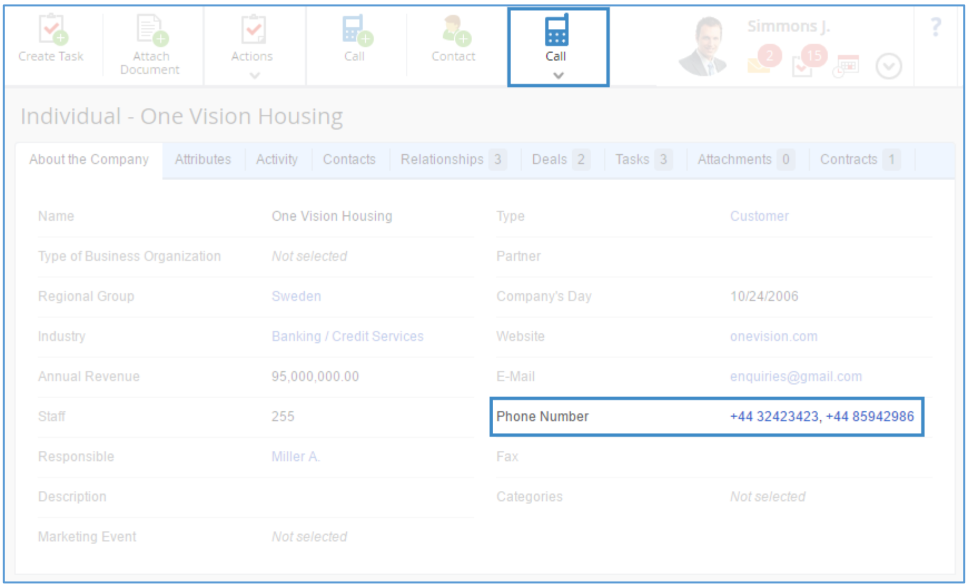


Fig. 270. Making an outgoing call from a contractor's page

If there are several phone numbers specified for a **Contractor, Lead** or **Contact**, the system will offer to select one of them as soon as you click **Call**.

Once you've clicked **Call** and chosen the desired phone number on a **Contractor, Lead** or **Contact** page, the **Outgoing Call** window will open (Fig. 271).

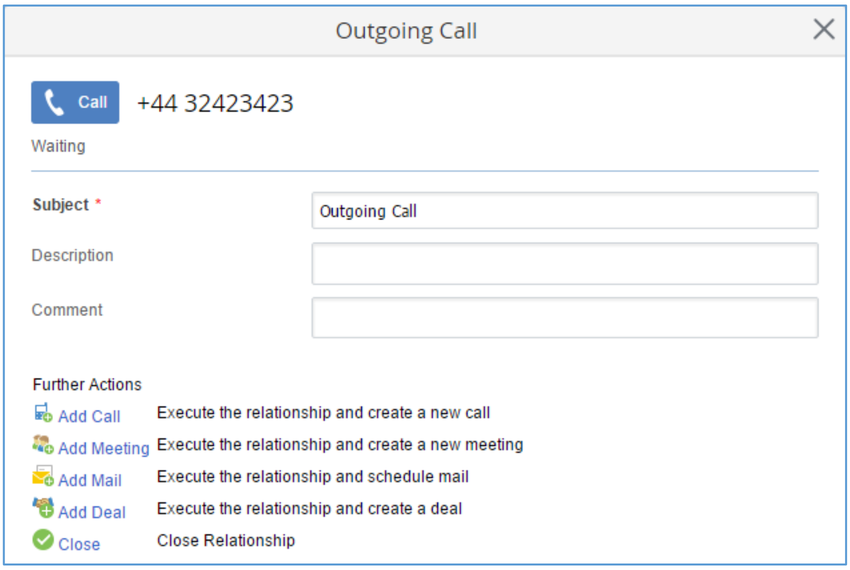


Fig. 271. Outgoing call dialog box

When you click on the **Call** button, a call will be made using the installed application for Internet telephony (in our case, X-Lite). During the call, the **Outgoing Call** dialog box (Fig. 271) remains active. After/during the conversation, fill in the required fields in this window.

If you want to save information about a call, click one of the buttons in the **Further Actions** section. You can not only **Close Relationship**, but also plan new activities.

Closed relationships are displayed on a **Contractor, Lead** or **Contact** page (depending on where you called from) on the **Relationships** tab (Fig. 272.).

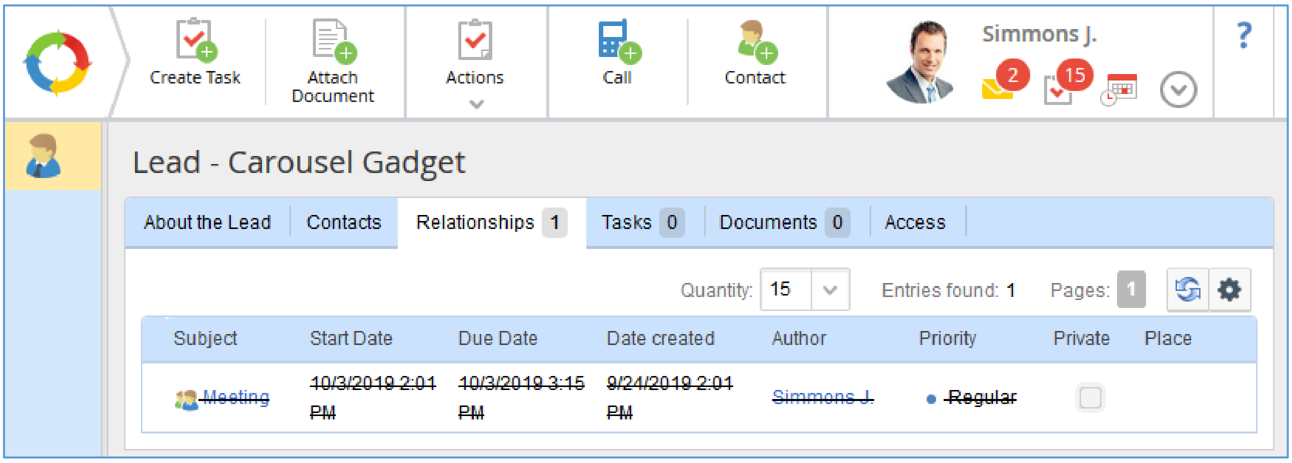


Fig. 272. Relationships tab on a contractor page

When ELMA is integrated with one of the IP telephony systems, in the lower right corner, you can find the telephony panel (Fig. 273). It allows you to make outgoing calls and view call history. Besides, the panel displays the latest calls and a field for searching by name, company or number. In addition, you can quickly access different objects right from this panel.

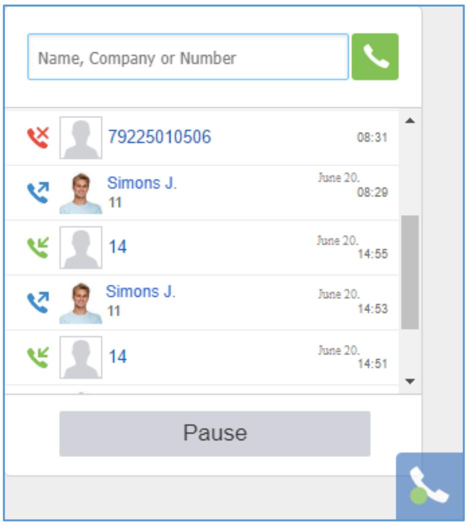


Fig. 2734. Telephony panel

6.2. Incoming Calls

In the following subsection we will take a look at how to receive and process a call. When the system settings are correct, the user receives calls right in the Internet telephony application.

In our example, the X-Lite softphone will display a notification about an incoming call and the caller's number. Click **Answer** here (Fig. 274).

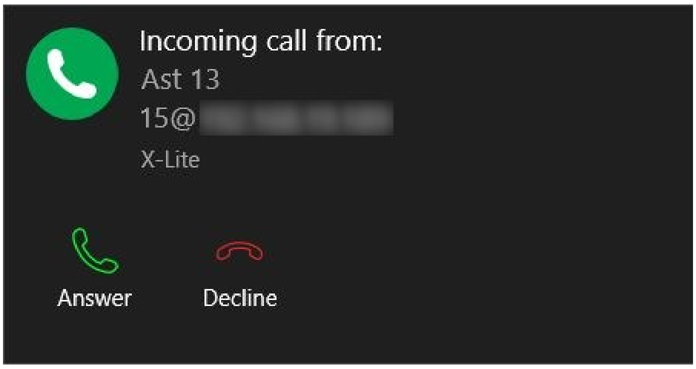


Fig. 274. Incoming call notification

Once you've taken the phone, ELMA will automatically open a new browser window (Fig. 275). It contains two sections: **Call Information** and **Object Page.**

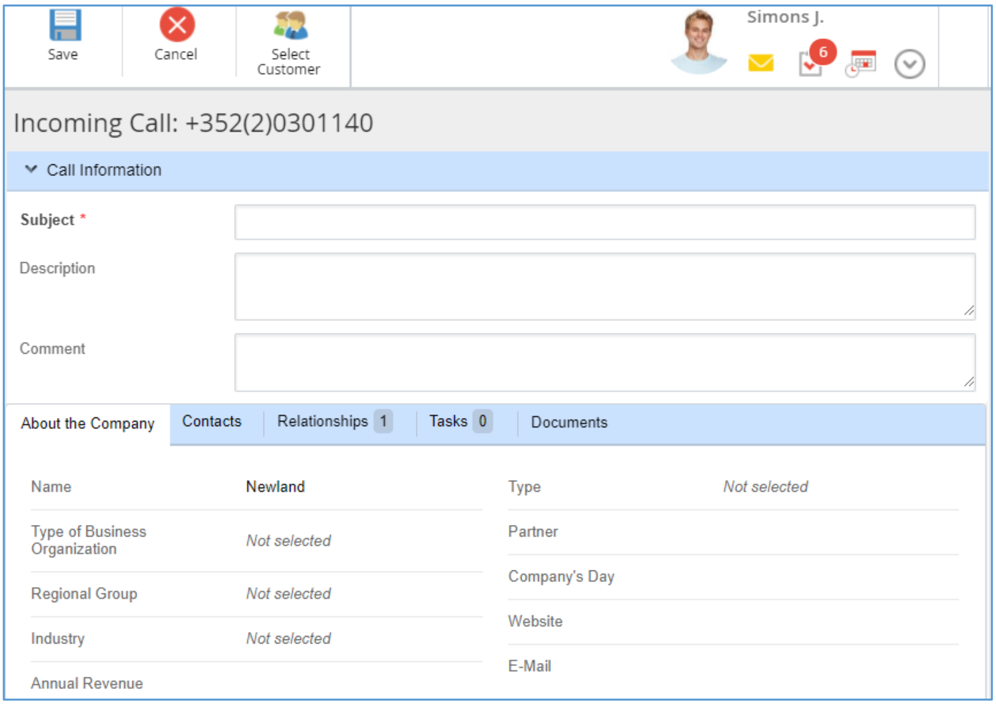


Fig. 275. Incoming call creation form in web

Click **Save** in the top toolbar and the system will offer to choose one of the following actions (Fig. 276):

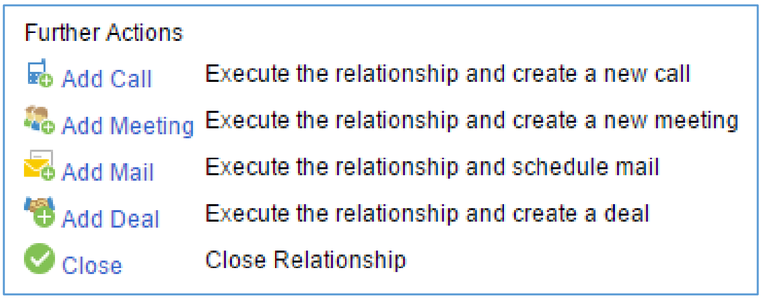


Fig. 276. Save call dialog box

Let’s choose **Close Relationship.** The following page will display the notification: ‘The call is successfully registered’ (Fig. 277).

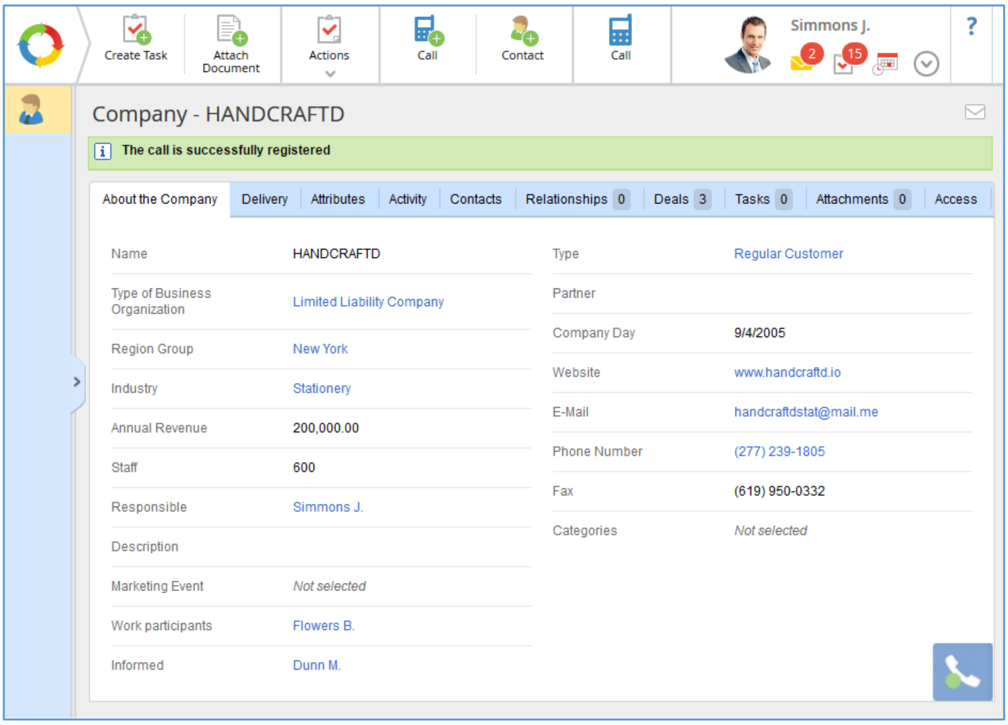


Fig. 277. Contractor page. ‘The call is successfully registered’ notification

If in the system there is no object with a caller’s phone number, the **Incoming call <Phone number> (<created object>)** form will open (Fig. 278). Note that the type of the object being created depends on the settings configured in ***Administration – System – System Settings – Telephony.*** By default, **Leads** are created (Fig. 278).

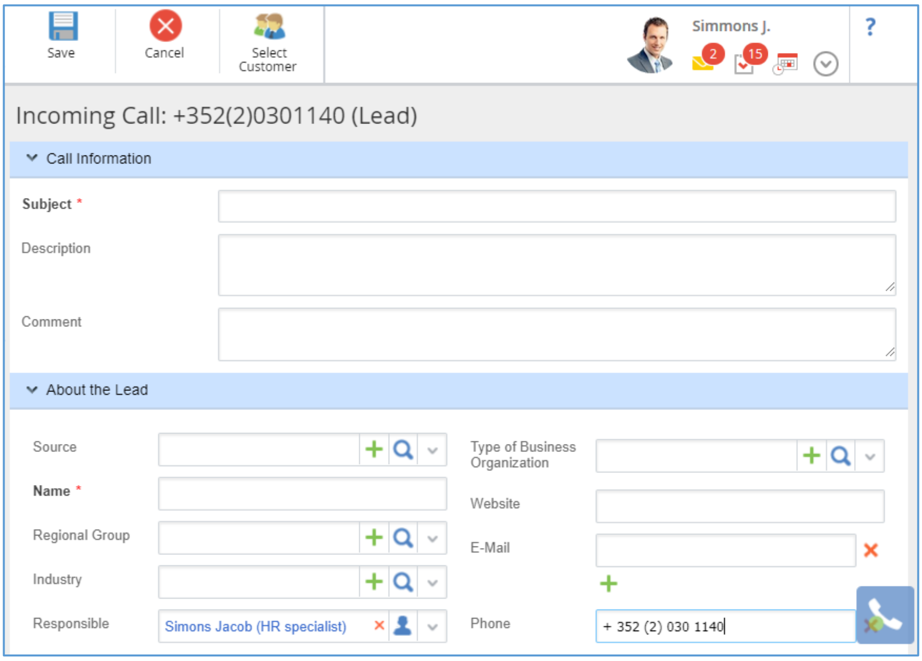


Fig. 278. Incoming call creation form. The lead object being created

You can also assign an incoming call and a number to an existing ELMA object. To do so, click the **Select Customer** button in the top toolbar. A dialog box will pop up (Fig. 279) where you can select a **Customer Type** and choose a customer from the drop-down list. Click to search for a customer, and to add a new one. If necessary, you can **Save Phone Number** by checking the corresponding box.

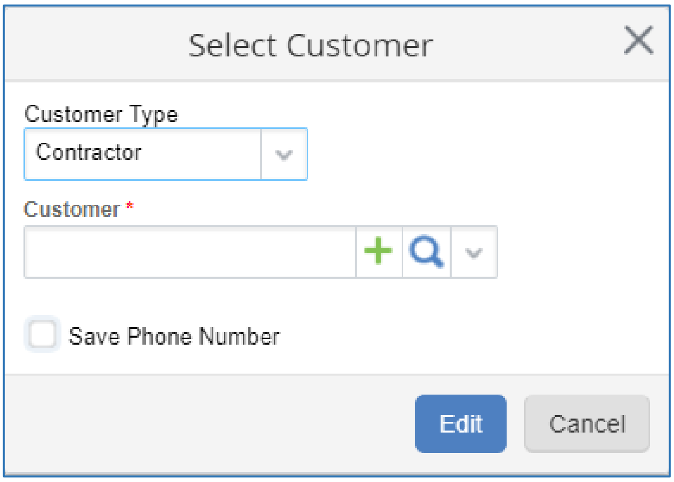


Fig. 279. Select customer dialog box

Once you've filled in all fields, click **Save** at the top. The incoming call is registered and a new **Lead** will be added to the system.

6.3. ELMA-based Customer Service Center

A **multi-channel contact center** is a tool for automating and streamlining customer service. Multichannel implies the possibility of interacting with customers through several communication channels: call center, email, Internet chat, mobile applications, social networks, etc.

In recent years, non-voice channels have grown a lot. Despite this trend, voice communication channels, IP telephony in particular, still occupy the largest share of this niche.

This is because IP telephony does not need complex infrastructure: call center employees can be in different regions, and telephony can be integrated with CRM systems.

ELMA CRM+ can serve as a basis for a full-fledged call center. First of all, ELMA does not require any additional equipment. To make it work correctly, you just need to integrate it with a telephony provider (e.g. Asterisk, Oktell or Infratel), and run ELMA Agent and softphone. In the examples described above, we used X-Lite, a freeware app for making phone calls.

Secondly, in ELMA you can implement call queuing, which allows distributing incoming calls among operators as they become available. The first employee to become available receives the next call.

Another advantage is that **ELMA CRM+** automatically opens customers' pages when somebody makes an incoming call (see Section 6.2). Thanks to this visualization, an operator can gain a fuller understanding of who is calling. A customer's page can display detailed information about the caller, for instance, about the services that the customer already uses. This lets operators avoid unnecessary questions, speed up interaction, which will result in increased customer loyalty. If there is a new customer calling, an operator can enter information about them on an automatically opened form selecting any object type.

Most importantly, **ELMA CRM+** can start business processes when receiving an incoming call. Picture a call center of an Internet provider. An operator receives a phone call. The client is experiencing an issue with their Internet connection. During this conversation, the call center employee can start the 'Emergency Request/Trouble ticket' business process during which the technical specialist will go to the subscriber and check the equipment.

To sum up, integrating **ELMA CRM+** with IP telephony can help you cut communication costs. Moreover, with ELMA you can create an alternative to traditional telephony and a platform for a modern call center.

Chapter 7. Tracking Marketing Activities

The **Marketing** section contains information on a company's marketing activities aimed at attracting new customers and increasing sales, for example: promotional videos on television and radio, online ads, advertising on LED screens and banners, presentations, exhibitions, sales, etc.

This brings up the question though: how can we evaluate the effectiveness of a marketing campaign? It shouldn't come as a surprise that after some time we need to calculate how much money one or another campaign has brought to the company. At the same time, it might be rather time-consuming to do it manually. The **Marketing** subsection allows you to maintain a register of marketing activities and evaluate their effectiveness.

This subsection contains information about a company's **Marketing objects,** as well as tools for creating and working with them. When you open this subsection, the **Lead Dynamics** page of the **Calendar** opens automatically (Fig. 280).

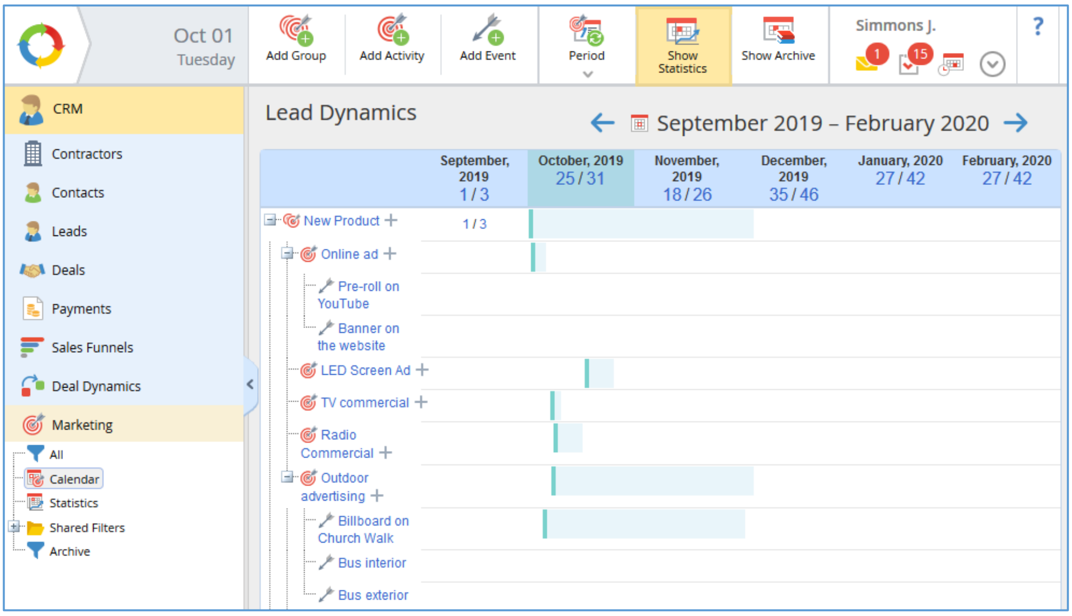


Fig. 280. Lead dynamics

In this section, you can evaluate the ratio of new leads to their conversion over a certain period of time. Fig. 282 shows that, for example, in October there were 31 new leads (the number after the slash sign), and 25 of them (the number before the slash) were converted from a lead to a customer.

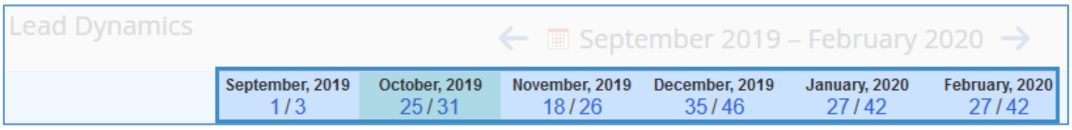


Fig. 281. 'Month' view of the lead dynamics page

Click on one of the numbers to open the **Leads** page. If you click on a number before the slash sign, it will show you the list of leads converted to contractors over the selected period. If you want to see the list of all created leads over this period, click on the number after the slash sign.

Below in this section, we will consider how to work with marketing campaigns and events, view statistics, and use UTM parameters.

7.1. Marketing Objects

There are three main **Marketing Objects**: **Marketing Event, Marketing Activity, Marketing Activity Group**. Read this section for more details.

Marketing Activity Group (Fig. 282) is the first level of the marketing activity tree. It includes **Marketing Activities** each of which, in turn, contains a certain set of **Marketing Events**.

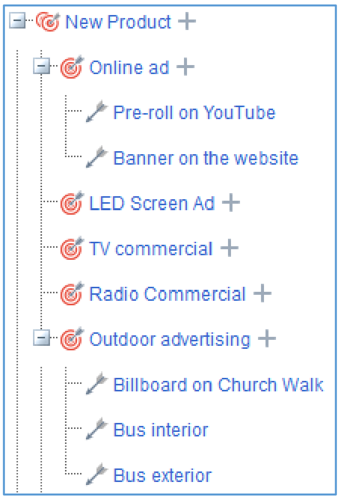


Fig. 282. Structure of marketing activity tree

To create a **Marketing Activity Group**, go to **CRM – Marketing – Calendar** and click **Add Group** in the top toolbar (Fig. 283).

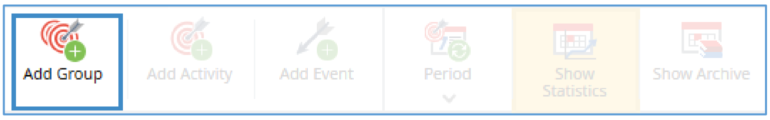


Fig. 2834. Adding a marketing activity group

On the page that opens (Fig. 284), fill in the required fields: **Name, Description, Responsible, Budget Type, Group Type,** and **Labels** (for more details on UTM-labels, refer to Sections 7.3 and 7.4).

Note that you can enter an activity group budget manually or it can be automatically generated from the group's nested objects.

If you select the **Enter the budget manually** option from the **Budget Type** drop-down list, all costs of activities and activity groups will have to be specified manually (the cost of the nested objects will not be taken into account).

When you select the option **Budget is calculated according to the nested objects**, the costs of activities and activity groups will be automatically formed from nested activities and events.

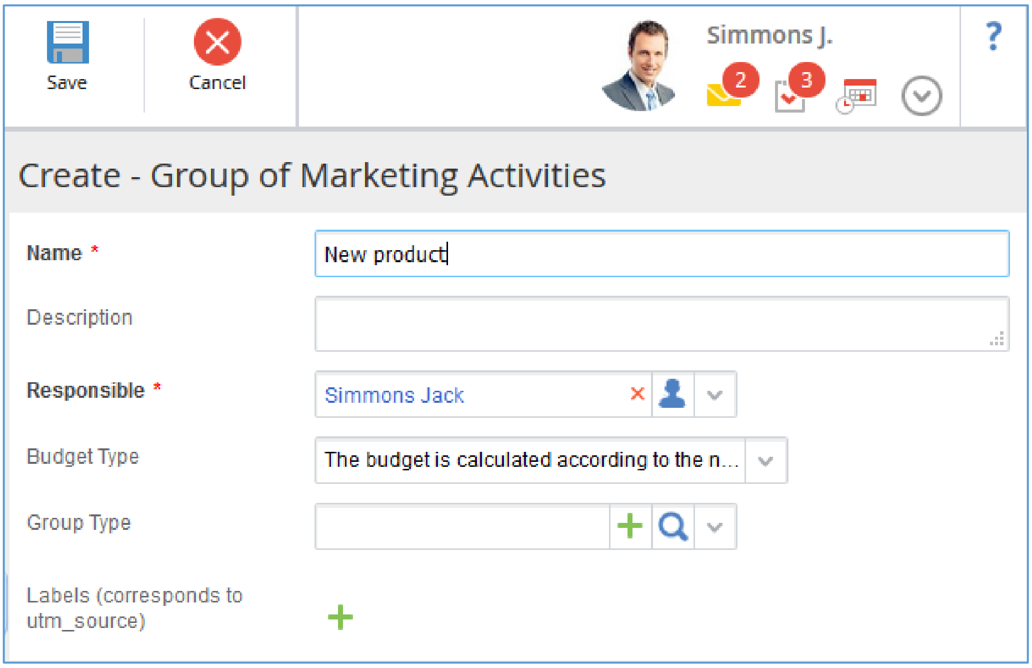


Fig. 284. Creating a marketing activity group

When filling in the **Budget Type** field, the system will automatically calculate ROI (return of investment). On the group of marketing activities page (Fig. 285), users will be able to see how much it cost to lure one lead, and, therefore, evaluate the effectiveness of the advertising campaign.

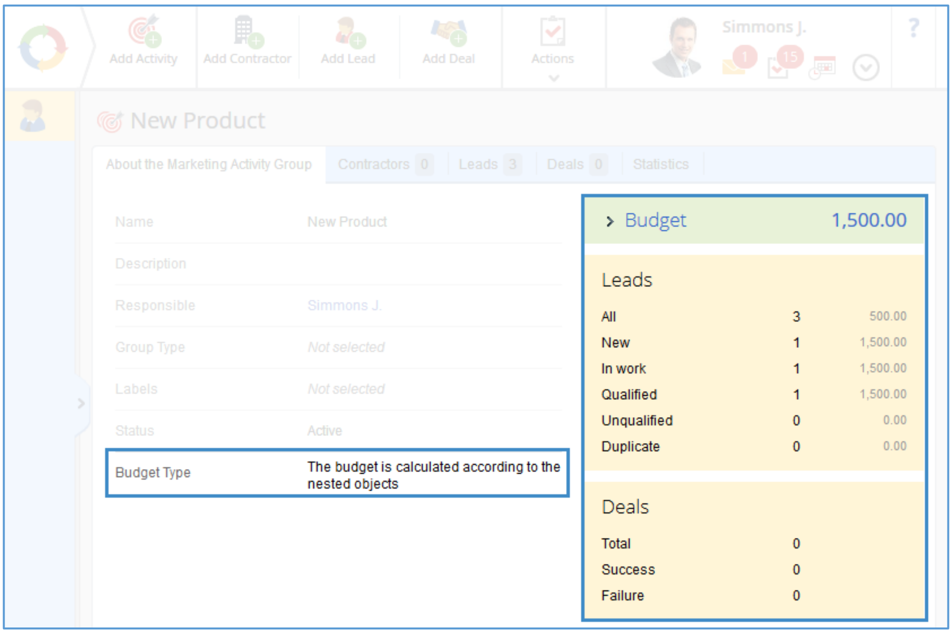


Fig. 285. Group of marketing activities page. Automatic budgeting

Marketing Activities (Fig. 286)**,** which are part of **Groups of Marketing Events**, are a set of marketing events aimed at luring new customers and promoting new products of the company. You can find the **Marketing Activities** page in **CRM – Marketing – Shared Filters – Activities**.

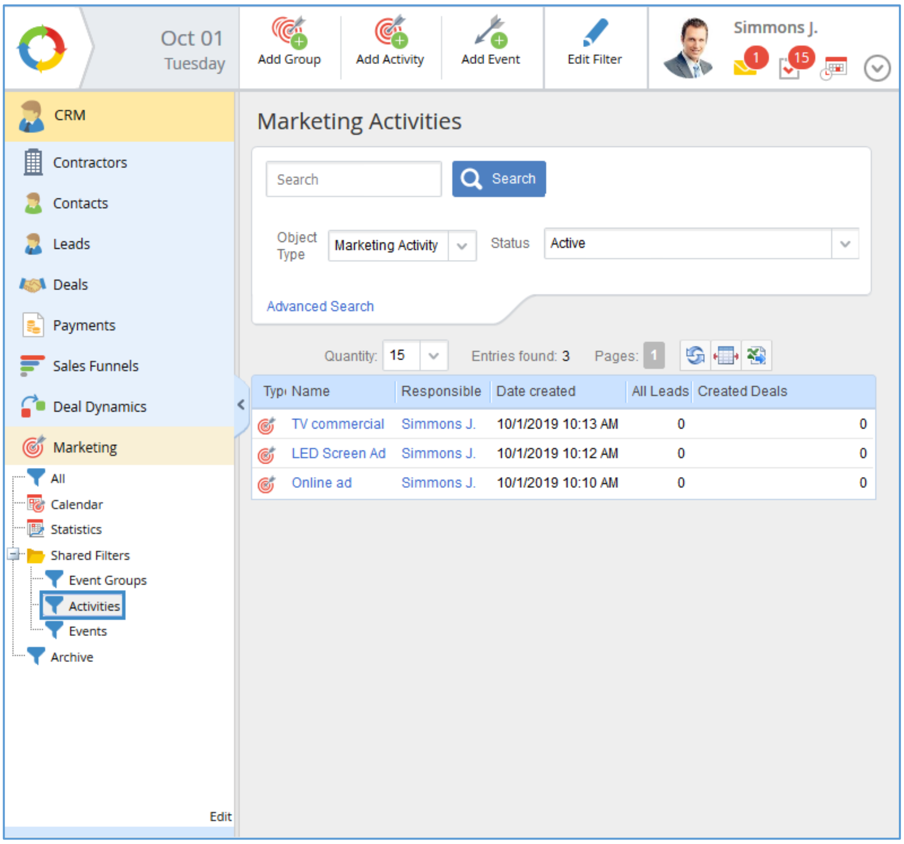


Fig. 286. Marketing activities subsection

Click **Add Activity** at the top to create a new **Marketing Activity.** A pop-up window will open. Note that in the **Create Marketing Activity** window, there are the required fields – **Start Date** and **Due Date**. Use these fields to specify the duration of an advertising campaign (discounts, marketing exercises, etc.) (Fig. 287).

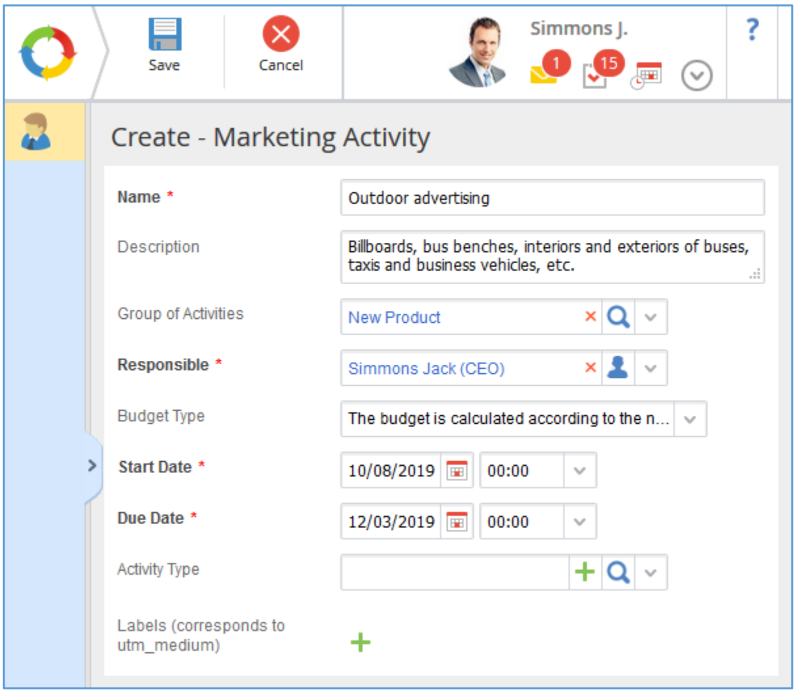


Fig. 287. Creating a marketing activity

Marketing events (Fig. 289) are objects that will affect the target audience just once. They are part of **Marketing Activities** and **Marketing Activity Groups**.

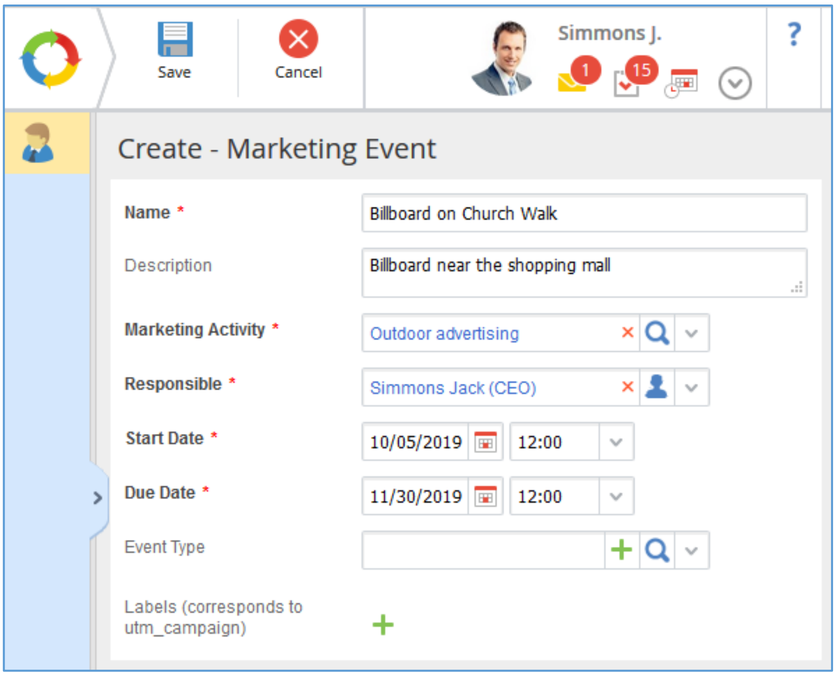


Fig. 288. Creating a marketing event

Now that **Marketing Objects** are added to the system, users can see, while creating a **Lead**, why exactly a potential customer approached the company: if it was due to an activity group, activity or a specific event, e.g. outdoor advertising, TV commercial, an exhibition booth, conference, etc.

Please note that after a lead is converted to a contractor, the contractor will inherit the specified marketing activity.

7.2. Statistics

It is important to identify which marketing event were successful and attracted potential customers: this information is reflected in the **Statistics** subsection (Fig. 289). To open it, go to **CRM – Marketing – Statistics**.

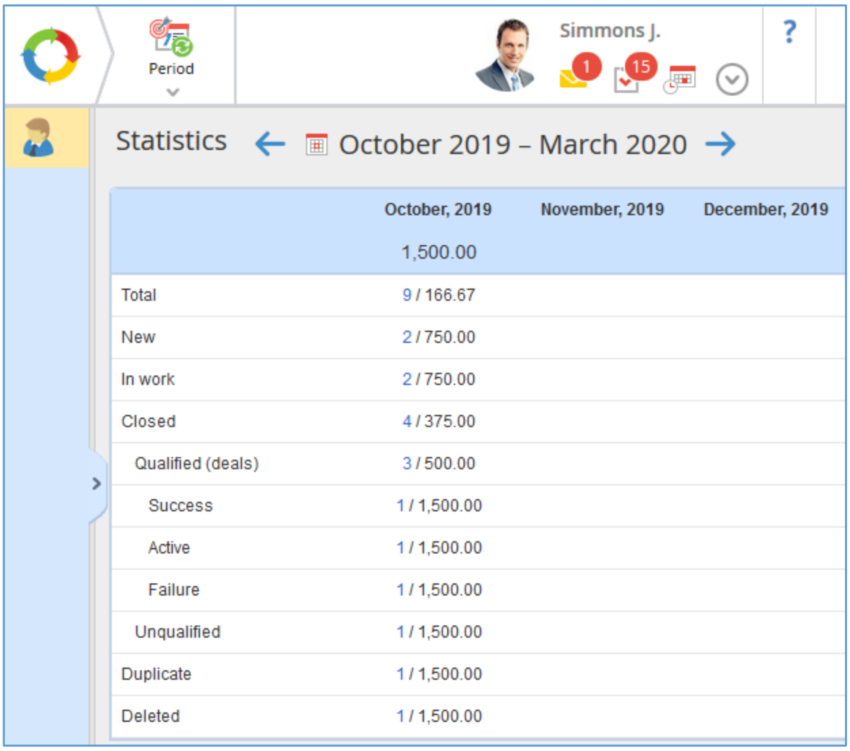


Fig. 2890. Statistics subsection

This subsection allows you to evaluate the cost of **Leads** and **Deals** over various time periods. However, this is only possible if users add payments to marketing objects aligning **Leads** and **Deals** with them.

The top toolbar features the **Period** button (Fig. 290) which allows you to view monthly, weekly and daily statistics.

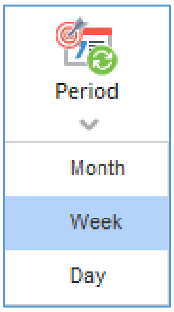


Fig. 290. Period button

On the **Statistics** page, you can see a data table (Fig. 289). Rows of the table represent lead statuses, whereas columns display periods. At the intersection of rows and columns, numbers are displayed with the ‘/’ sign.

The first number shows how many **Leads** have one status or another (indicated in the row name) for a specific period. Clicking on this number opens a page with a list of these **Leads**.

The second number shows the cost of one **Lead** for a selected period. The cost is expressed in the currency specified in the system settings. The cost is calculated by the following formula: a marketing object budget in the current period divided by the number of leads created for this period. For example, if the monthly budget of a **Marketing Object** was $100 and during this time 10 new leads were generated, the cost of one lead is $10.

You can also view statistics on the cost of leads and deals on a marketing object page (Fig. 285).

This is how you can analyze which **Leads** were converted into **Deals** and whether the deals were closed or failed. This will help you understand what marketing object is the most or least effective, and which one is worth investing to.

7.3. Working with UTM parameters

ELMA allows you to work with **UTM parameters**. They are simply tags that you add to a URL of a site or a page to track traffic sources. In marketing, UTM parameters are used to track the results of advertising campaigns, sales, and any content on the site.

Let's assume that your company places online ads on Google using **UTM parameters**. An ad link leads to a specific page of your organization's website, where potential customers leave their data. Advertising campaigns are marked with the same tags by which **ELMA CRM+** begins to 'recognize' the advertising campaign. Due to these tags, it is clear which marketing event (form on the site, landing page, etc.) transmitted data about a lead to the system. In ELMA, this is reflected on lead (Fig. 298) and contractor pages, as well as on marketing activity group pages (Fig. 295).

This tool helps you quickly understand which sections of your advertising campaign bring the least profit, timely respond to changes on the site, and reallocate your advertising budget.

Each **UTM tag** must contain a parameter and its value that has to be tracked. They have names that allow analytics systems to read them correctly. There are three required labels; in the example below, they are highlighted in red:

www://example.com/?utm_source=google&utm_medium=cpc&utm_campaign=windows_search

utm_source – advertising space name. This parameter indicates the name of a traffic source (e.g. Google, Facebook, etc.).

utm_medium – advertising type. This parameter is filled according to templates. For example, 'CPC' (stands for 'cost per click') is contextual advertising, whereas 'display' is banner advertising, which is paid per impression.

utm_campaign – advertising campaign name. This parameter allows you to distinguish between campaigns in a web analytics system. You can assign any value to this parameter, e.g. windows_search.

In **ELMA CRM+,** you must specify UTM parameters manually while creating or editing a **Marketing Object** (Fig. 291).

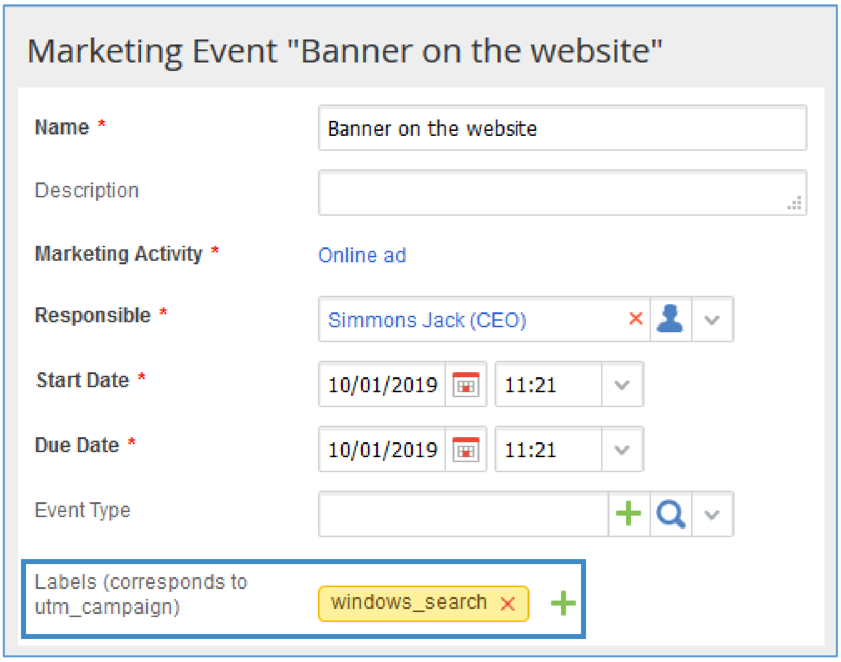


Fig. 291. Adding a tag (label) while creating a marketing event

In the future, when taking out online ads, these tags, as described above, must be embedded in a URL. For more detail on how to work with UTM parameters, read Section 7.4.

7.4. Use Case

In this use case, you will see how to use the **Marketing** subsection, namely, launch an advertising campaign for the sale of plastic windows with premium installation. The sales promotion campaign will last for 3 months. We will also set a specific budget, create UTM parameters, embed them in the site form and track new leads. Note that in this subsection, you will only find out how to work with UTM parameters and collect leads. In Chapter 9, we will take a closer look at how **Leads** get into ELMA and go through the life cycle from a potential client to a **Contractor** or **Deal**.

First, create a **Marketing Activity Group** as we did in Section 7.1 of this manual. The advertising campaign will be launched in Google Ads. Second, name the activity group according to the platform where the advertisement will be placed. Then set the **Responsible** for the **Activity Group**, choose the **Budget** and **Group Types** (Base Type), and specify the **Label** – googleads– this is what it will later look like in the address bar (Fig. 292). Finally, save the group.

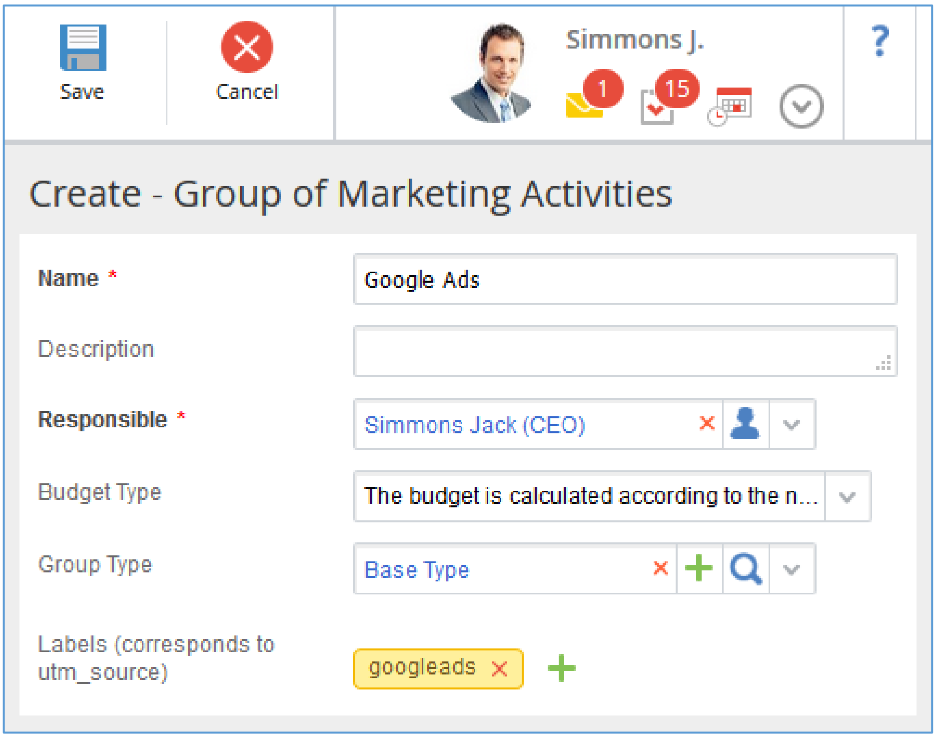


Fig. 2923. Creating a marketing activity group

In the same way, create child objects: **Marketing Activity** (Fig. 293) and **Marketing Event** (Fig. 294). On the form for creating a **Marketing Activity**, the group will be set automatically. You don't have to set the **Budget** manually – the system will offer to form it automatically from nested objects. Specify labels with the following values: **utm_medium=38341967** and **utm_campaign=windows_search**.

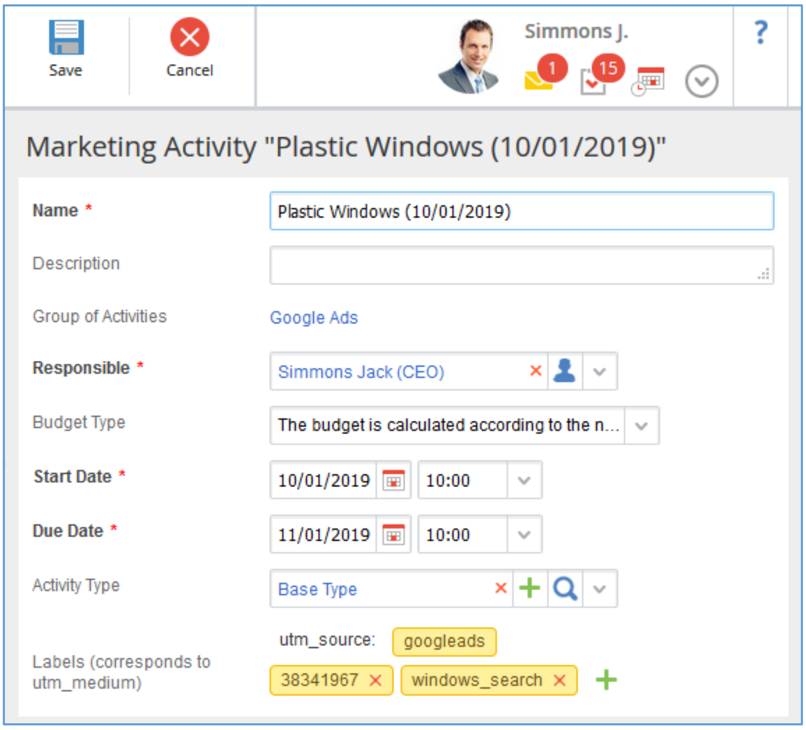


Fig. 293. Creating a marketing activity

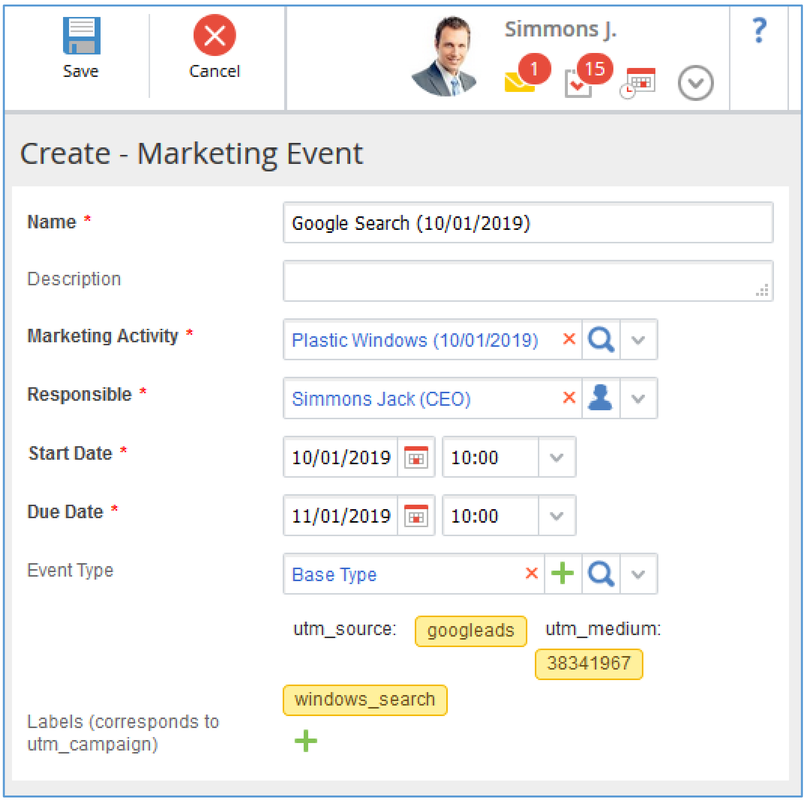


Fig. 294. Creating a marketing event

Once you've created activities and events, the **Marketing Activity Group** page looks as follows (Fig. 295):

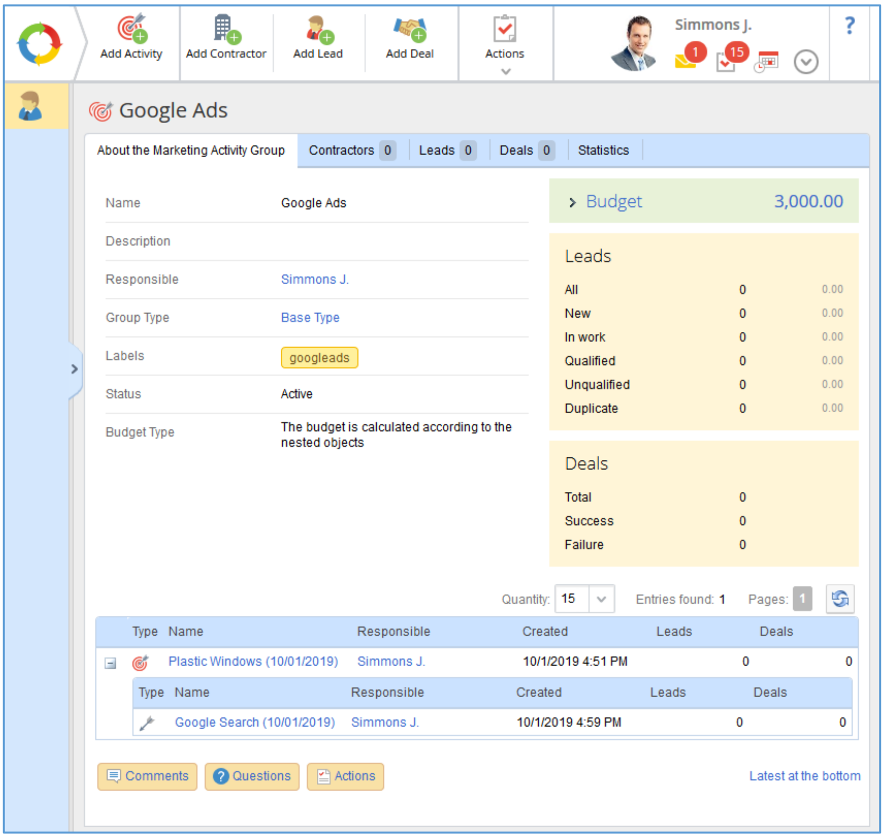


Fig. 295. Marketing activity group page

Now let's create UTM parameters using the Google Ads service. Fill in the fields as done in Fig. 296. Insert the link into the address bar (in the blue frame). You can use this URL as an example: **example.com/?utm_source=googleleads&utm_medium=38341967&utm_campaign=windows_search**.

On the right side of the page, you can see a preview of the ad being created.

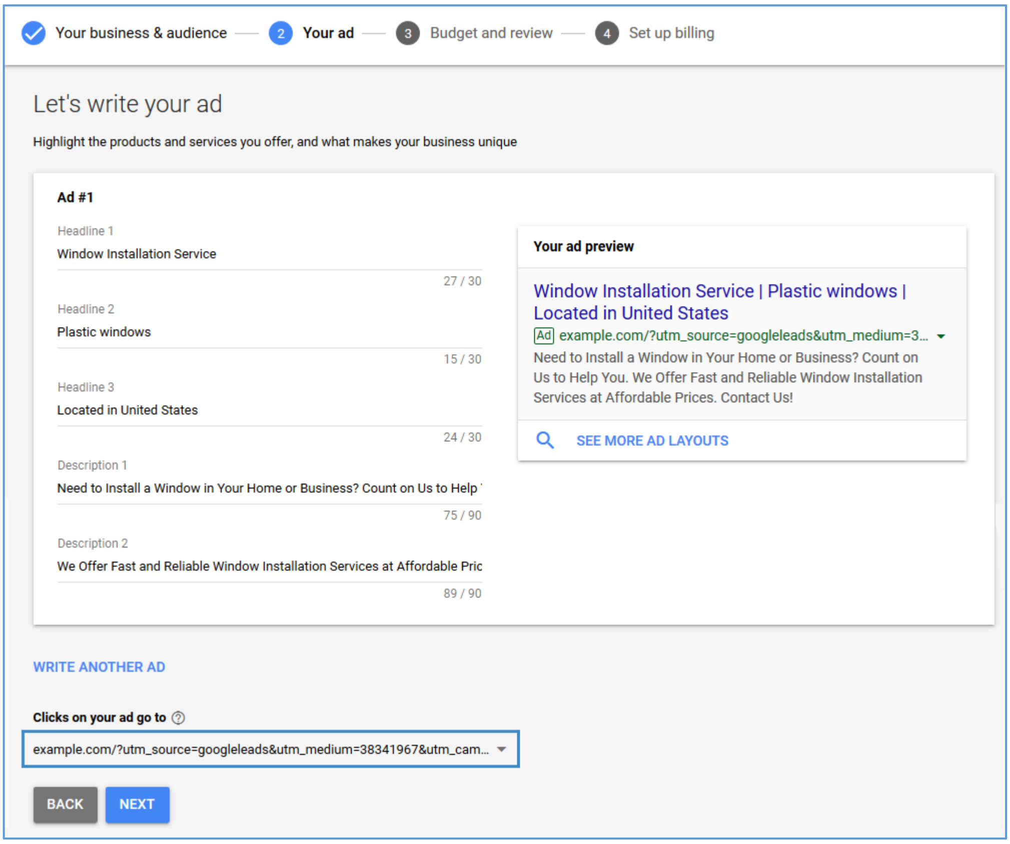


Fig. 296. Activity group creation form in Google Ads

This is how the created ad will be displayed in search results (Fig.):

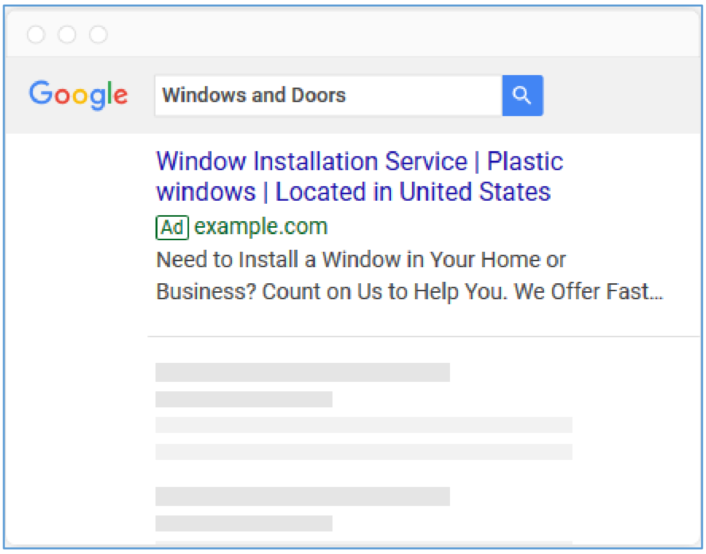


Fig. 298. Created ad displayed in search results

Clicking on the ad will bring a potential customer to the company website where they can enter their data on a special form (Fig.). Note how the UTM parameters are used in the address bar (in the blue frame).

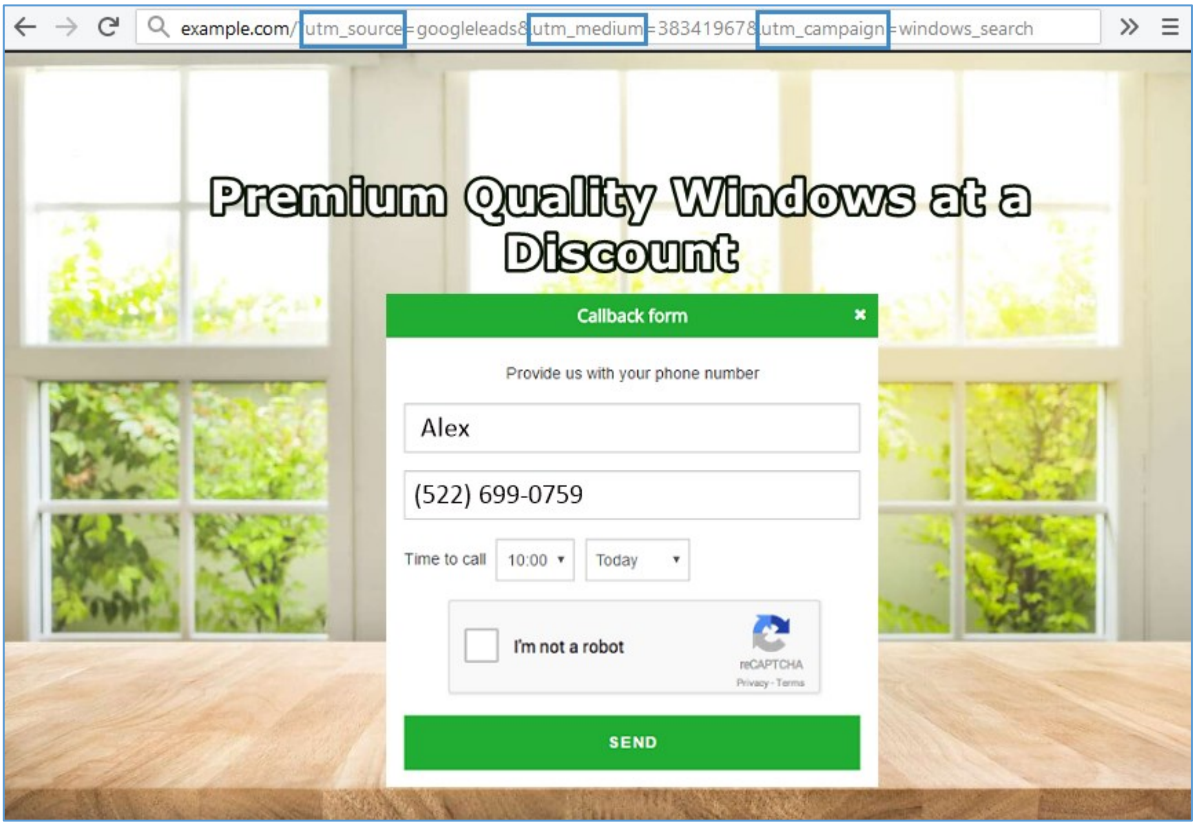


Fig. 299. Fill-out form on the company website

Information that a potential customer enters on the form goes to the content management system of the Bitrix website. The data is arranged in columns (Fig. 297) that correspond to the previously configured UTM parameters.

Ваше имя	Телефон	Город	utm_source	utm_medium	utm_term	utm_content	utm_campaign	referer_url	referer_domen	referer_key
Alex	(522) 699-0759		googleleads	383419678			windows_search			

Fig. 297. Display of data entered on the site form in Bitrix

After that, data from the Bitrix integrates with ELMA and new **Leads** are added to the system.

Leads uploaded to the system look as in Fig. 298. On a lead page, you can see what source the customer came from and due to which **Marketing** event.

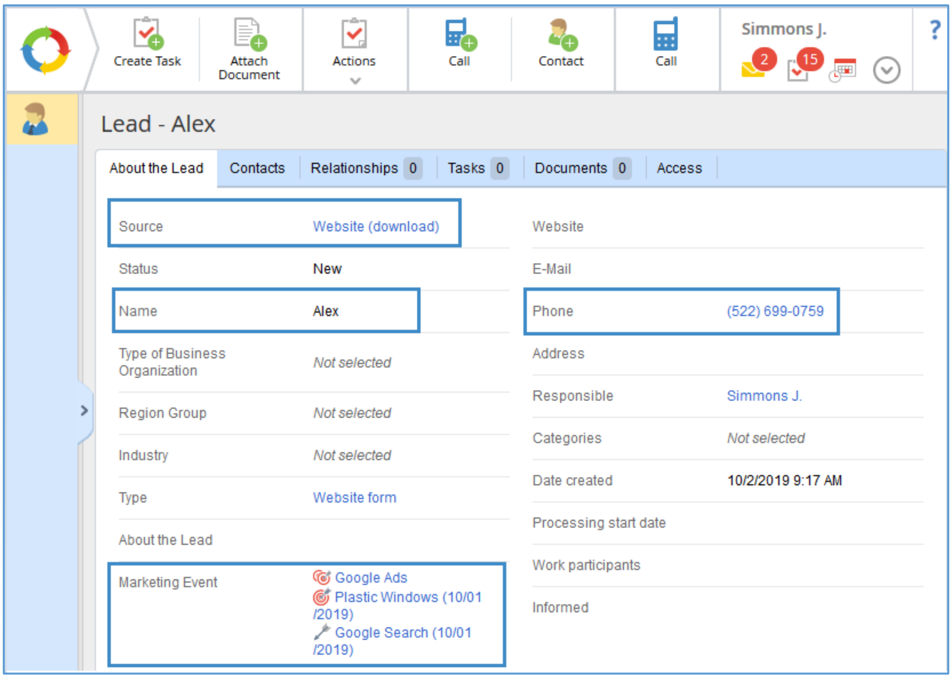


Fig. 298. Page of a lead who left their data on the site form

Chapter 8. Roles and Interfaces

To make each employee work more effectively, you can configure custom user interfaces for them. Thus, your employees will be able to quickly access necessary features, documents and business processes. Read Section 3.5 of this manual to gain the basic understanding of how to configure interfaces. You can also refer to the **Interfaces** section of the User Manual on the Web Portal. If you want to find out more about configuring portlets, read this Help page.

Below are the interfaces for the three main roles involved in the CRM module: sales rep, marketer and commercial officer. Note that in an actual configuration, pages may have different content, and portlets, filters and buttons can be called in another way.

First, let's customize the sidebar – it will be the same for all the above-mentioned roles. By default, the side menu features the elements that are unnecessary while working with CRM. Keep only these sections: **Messages, CRM, Tasks, Calendar, Documents.**

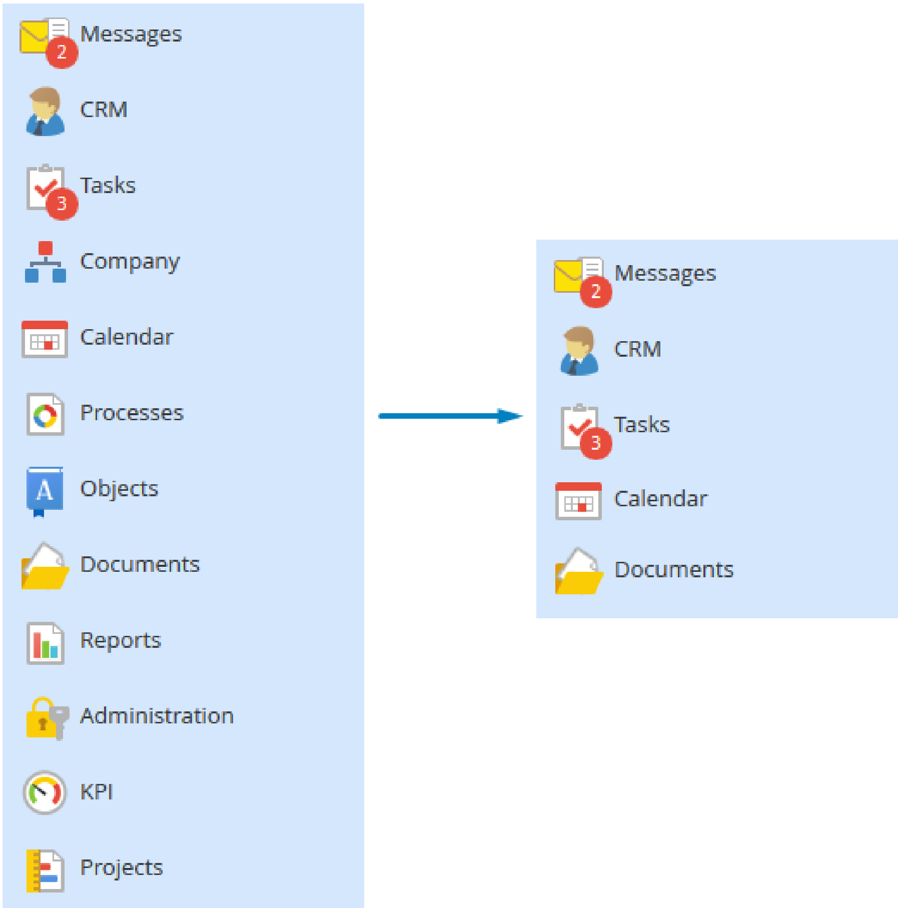


Fig. 299. Default sidebar sections –> Customized set of sections

8.1. Sales Representative

A sales rep is responsible for selling goods and services, increasing the number of **Contractors** and **Deals**, as well as maintaining their level of loyalty. However, most of their time sales specialists spend negotiating with customers.

Let's configure an interface that will help sales reps do their tasks. In Fig. 300 and Fig. 301 you can see what the main pages will look like.

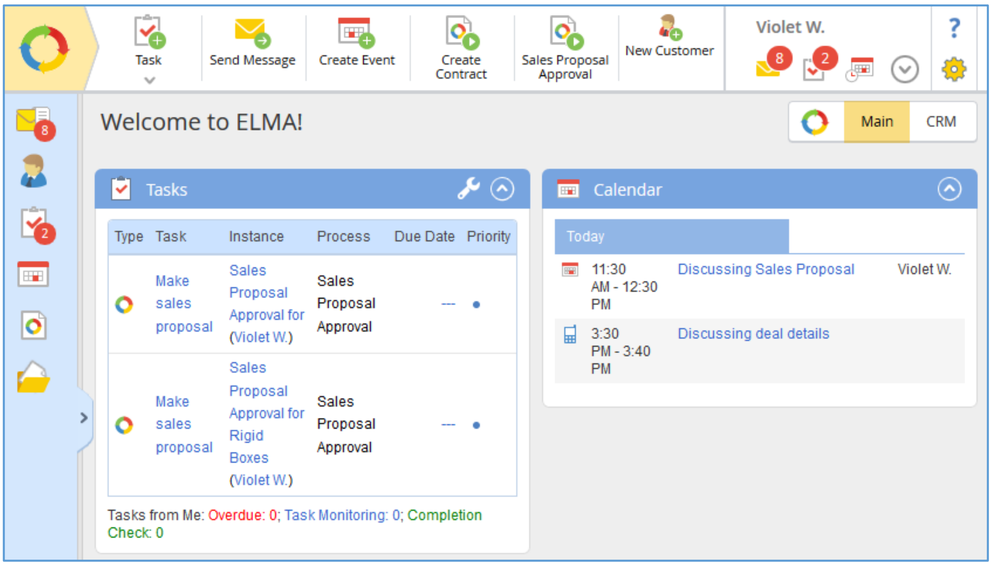


Fig. 300. Main ELMA page

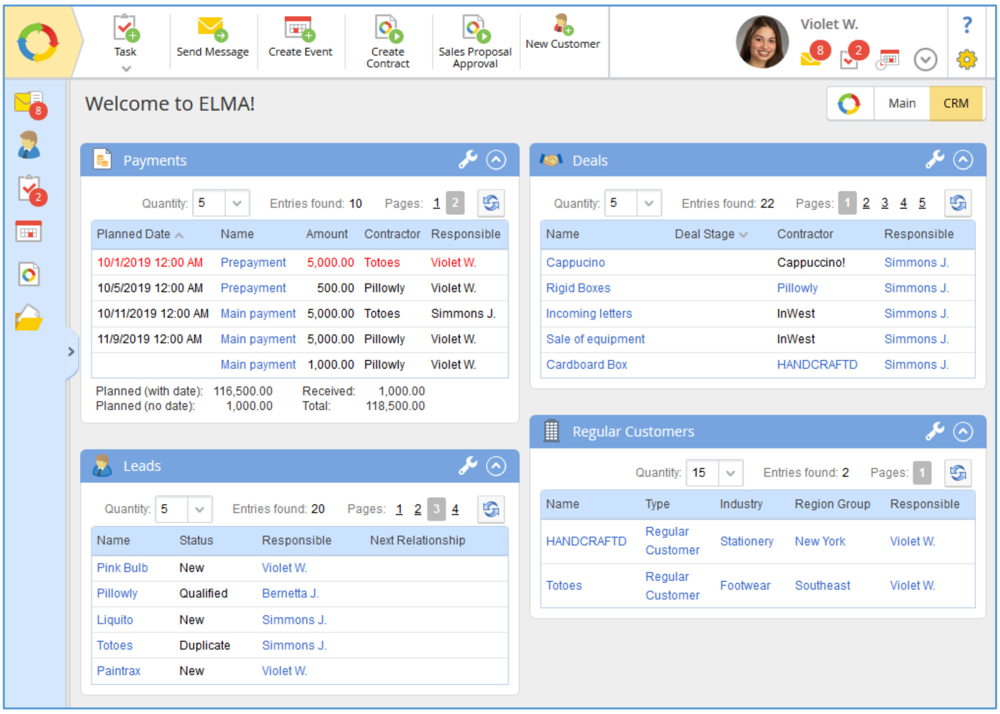


Fig. 301. CRM ELMA page

Users have two main pages. The first displays general information, and the second shows all data related to CRM.

The first Main page, by default, features portlets with tasks assigned to the current user and a calendar that displays data on the relationships that will happen soon (calls, meetings, etc.)

The second contains the following portlets: **Payments, Deals, Leads** and **Filter** (with **Contractors**). Remember to select the **Show only mine** parameter in the portlets' settings. This way a sales rep will see only information related to their payments, deals and leads, and therefore will not waste time searching for necessary data.

Now let's pay closer attention to the top toolbar (Fig. 302).

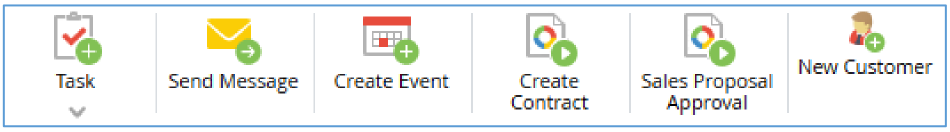


Fig. 302. Buttons on the top toolbar in the sales reps' interface

It includes an extended set of buttons providing quick access to various system functions. For instance, right from the toolbar you can create a task or event, send a message, start frequently used business processes (in our case, the processes 'Create Contract' and 'Sales Proposal Approval'), add a new contractor.

The main pages configured in such a fashion allow sales reps to quickly navigate through the system sections so that they can find required information and perform various actions as swiftly as possible.

8.2. Marketer

Marketers monitor the situation on the market and predict its development; make recommendations for improving product awareness and pricing; coordinate marketing campaigns during which the main goal is to attract more potential customers for less money.

Marketers will be able to do all these actions in a quicker and more convenient way if you configure a special 'Marketer Interface'. In Fig. 303, you can see the main page of this configuration.

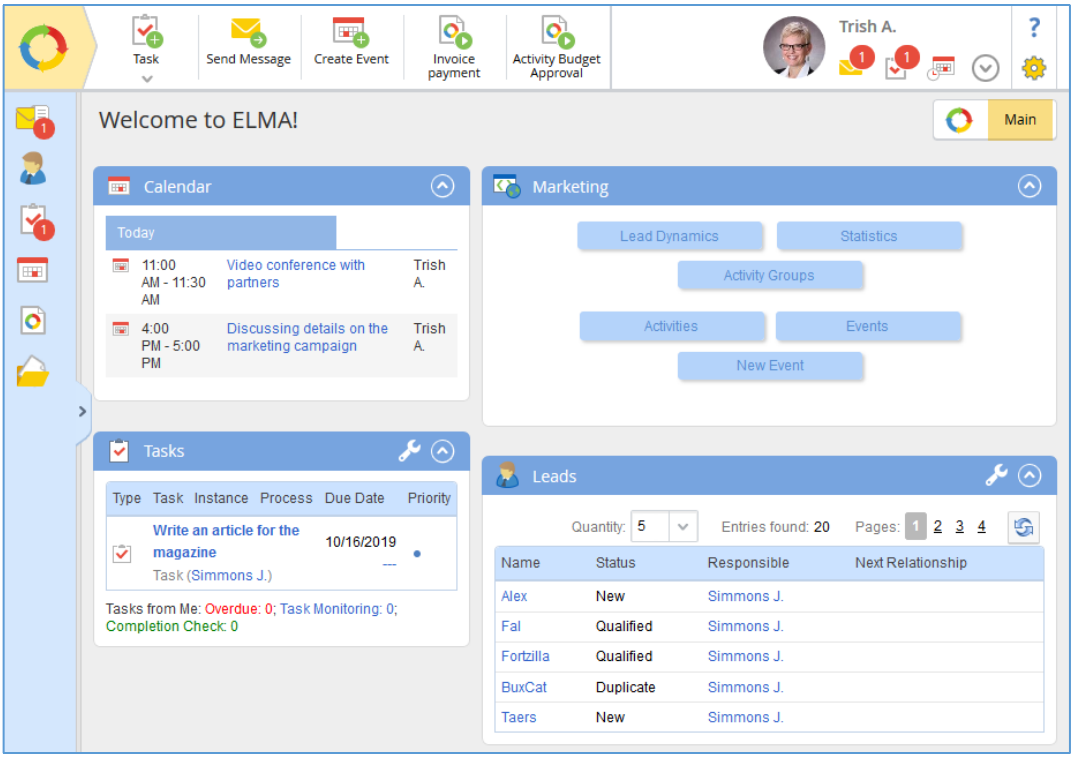


Fig. 303. Marketers' interface main page

On the main page of the marketers' interface, there are the standard portlets **Calendar** and **Tasks**.

Apart from that, the main page contains the **Marketing** portlet. There is no special portlet for this subsection, but you can create an HTML portlet that will allow you to go to a specific section of the system or to perform an action by just clicking specific buttons. As an example, let's create the following buttons: **Lead Dynamics, Statistics, Activity Groups, Activities, Events, New Event**. For more details on the HTML portlet and HTML-editor, refer to [this Help page.]

You can also use the **Filter** portlet and add the **Activity Groups** filter to it as shown in Fig. 304. This will help marketers quickly evaluate effectiveness of marketing activities.

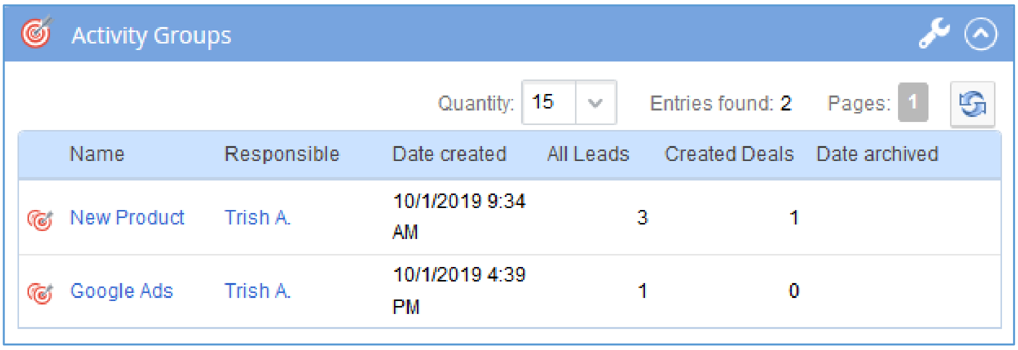


Fig. 304. Activity groups portlet

Besides the **Filter** portlet, the **Leads** portlet (with the **New Leads** filter) is also necessary for a marketer to evaluate the effectiveness of marketing activities. In some companies, it is the marketer, not the sales rep, who evaluates the potential of leads and moderates them. One of common examples is that random contacts with non-existent phone numbers and fictitious names land on the list of new leads. There is no point in wasting time on such leads, so marketers can immediately delete them.

In Fig. 305 you can see the top toolbar configured for this interface:

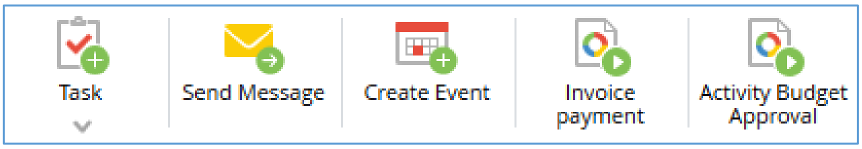


Fig. 305. Buttons on the top toolbar in the marketers' interface

Right from the top toolbar you can create a task, send a message, add an event, and start frequently used business processes (e.g. Invoice Payment and Activity Budget Approval)

Depending on the business scope and the responsibilities of a marketing department employee, the set of portlets and buttons may vary.

8.3. Chief Commercial Officer

The responsibilities of the CCO include: developing the company's commercial strategy, tracking deal dynamics and payments, keeping operational control of sales managers, as well as coordinating marketing activities and working with key customers.

Let's configure an appropriate interface for the CCO. As in the sales rep's interface, there are two home pages that help group and categorize information. This is why in addition to the main page, the 'Sales and Marketing' page has been created.

In Fig. 306 and Fig. 307, you can see the two main pages of this configuration.

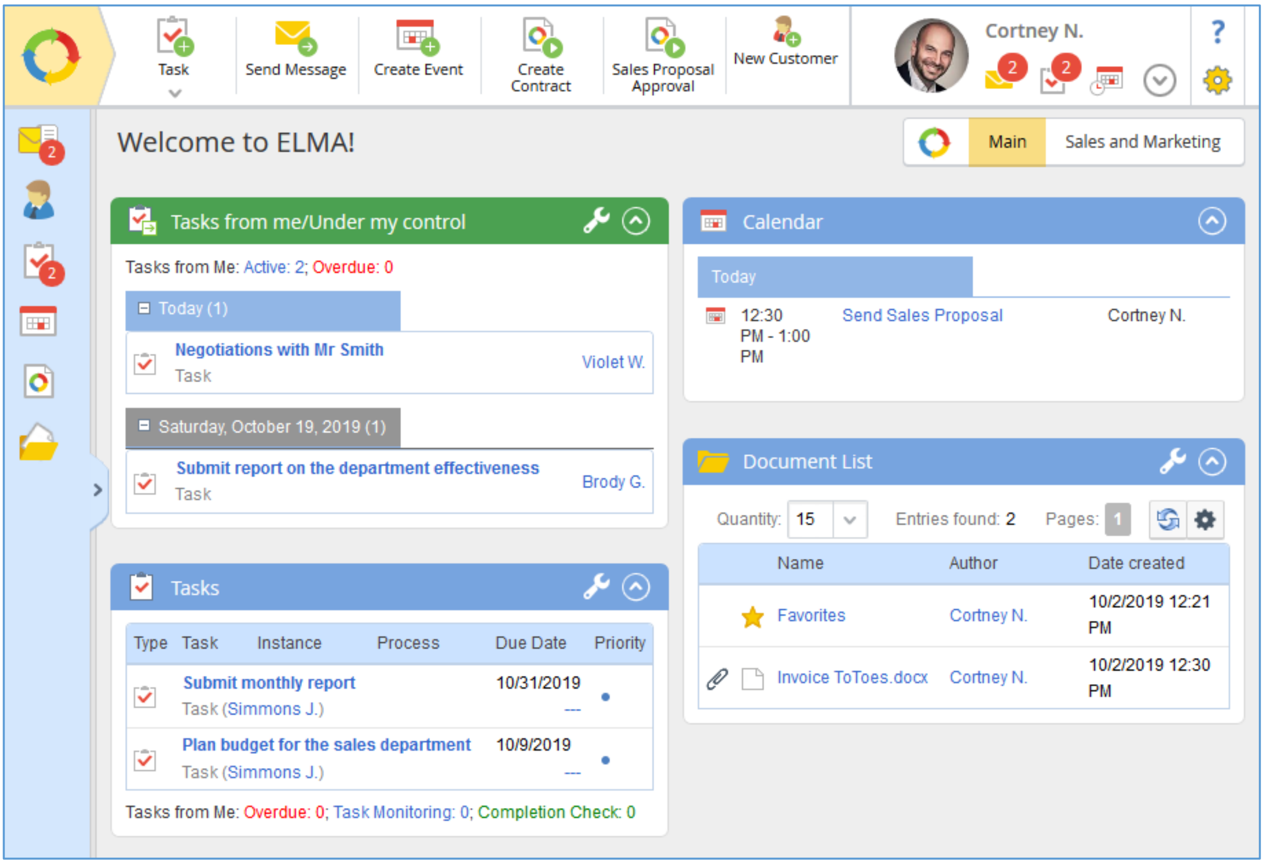


Fig. 306. CCO's main ELMA page

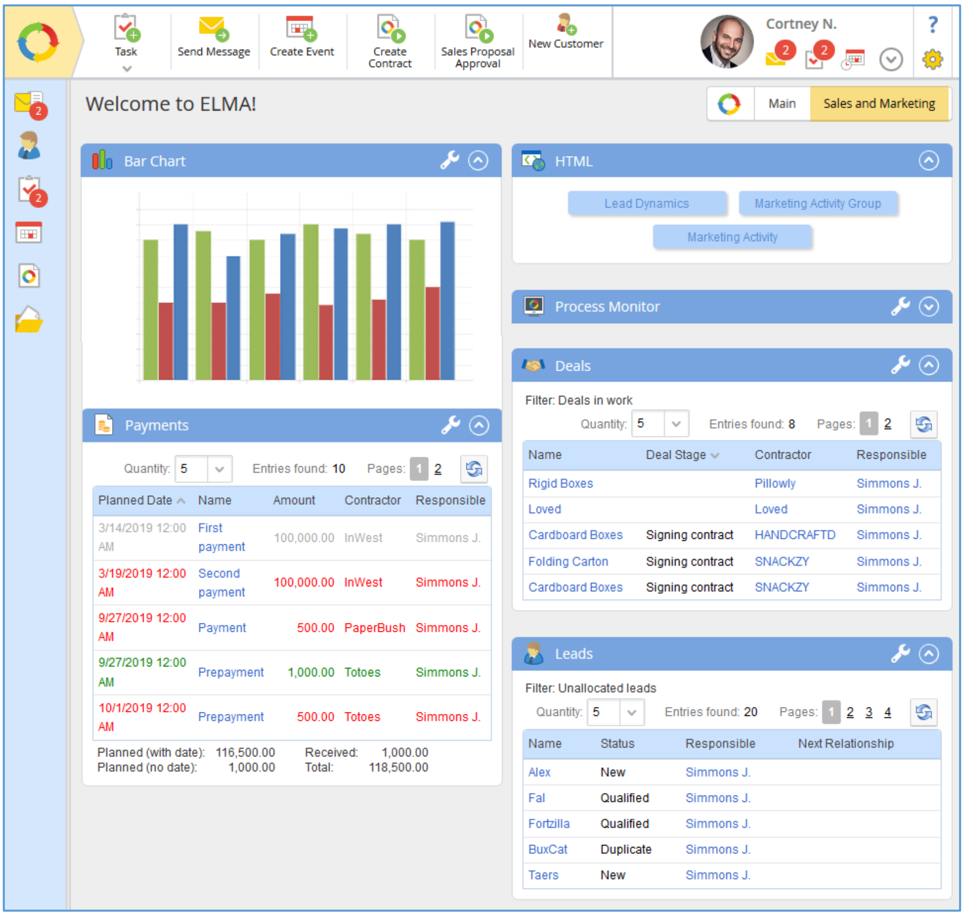


Fig. 3070. CCO's sales and marketing ELMA page

The first page features the **Tasks, Tasks from me/Under my control** and **Calendar** portlets. Calendar displays the events that the user scheduled in his/her calendar.

The second page contains the following portlets:

- **Bar Chart** – this portlet displays different metrics/KPIs. It also displays the KPI dynamics for the selected periods. In the portlet's personal settings, you can choose a KPI and periods and configure the the bar chart. Please note that if you want to select metrics/indicators to be displayed on the portlet, they must be initially configured in the ELMA Designer.
- **Payments –** this portlet allows the CCO to quickly track payments on all deals. In our case, filter is not applied.
- **Deals** – this portlet displays current deals (in our case we applied the 'Deals In Work' filter)**.**
- **Leads –** this portlet displays leads with the 'Unallocated leads' filter. When the CCO sees this information, he/she will assign **Responsible users** (sales reps) who will later on work with these leads.

- **Process Monitor** – this portlet helps monitor started process instances. It also displays process KPIs, responsible users and current process tasks.

Moreover, the CCO must have access to the **Marketing** sub-section. In our example, an HTML portlet has been created that contains the main pages of the **Marketing** subsection: **Lead Dynamics, Marketing Activity Group** and **Marketing Activity**. This Help page describes in detail how to configure HTML portlets.

The set of buttons on the top toolbar in this interface is the same as in the sales reps' interface because the CCO can also start some business processes when working with key customers.

In this chapter, as an example, we have configured three different interfaces. A real company might have other positions and a more complex structure of the commercial department. It is important to understand that for the convenience of each employee, it is necessary to provide a competently configured workspace in the system.

Chapter 9. ELMA CRM+ in IT Infrastructure

ELMA CRM+ can be used with other applications. In this chapter, you will find out how.

Companies with sources of leads on the Internet (feedback forms on websites, landing pages, etc.) can use ELMA to automatically upload leads. There are two ways:

- Importing leads from Excel;
- Business process for gathering leads from external systems.

Before importing, make sure that the user has permissions to this operation. The system Administrator can give permissions to user groups in **Administration – Application Access Settings – CRM – Import contractors, contacts, and leads**. If a user has required access permissions, he/she will see the **Import from Excel** button in the **CRM – Leads** section (Fig. 308).

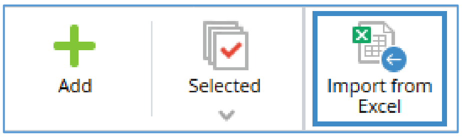


Fig. 308. Import from Excel button

Clicking on this button will start the import procedure consisting of two steps: **Select File** (Fig. 311) and **Import** (Fig. 312). At the first import step, at the bottom of the form, you can download (Fig. 309) templates for filling in data about potential customers. ELMA can recognize only such templates while importing.

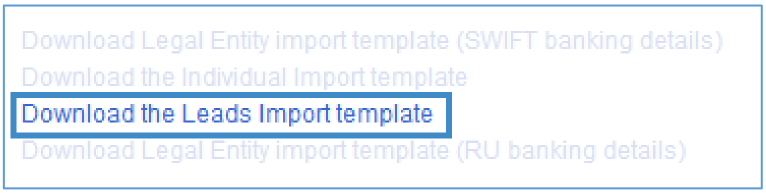


Fig. 309. List of import templates

For example, fill in the **Name**, **Date created**, **Status** and **Region Group** (Fig. 310) fields. Please note that the **Name** and **Date created** fields are required.

A	B	F	H
Name	Date created	Status	Region Group
Laen	10-02-19	New	New York
Inugasser	10-02-19	New	New York

Fig. 310. An example of a filled excel template

In the web application on the **Select File** page (Fig. 311), fill in the required fields.

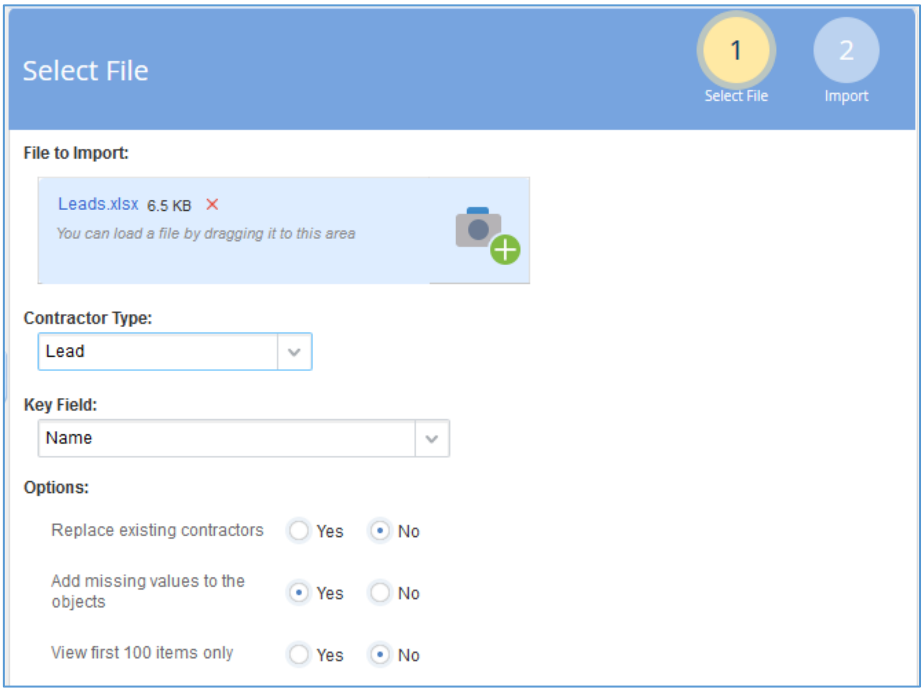


Fig. 311. Fields and options on the select file page

The **File to Import** field is required. Attach the filled out Excel template to it.

In the Contractor Type field, in the drop-down list select one of the contractor types: **Company**, **Individual** or **Lead** (in our case **Lead**). No matter what type you choose, the import procedure will be the same.

Key Field – a field that determines the uniqueness of a row in a table. When importing an Excel file, the program checks if there are any values that match the value in this filed. For example, a potential customer's email is used as a key field. In this case, imported Leads with the same E-mail, but with different names, will be considered the same Lead.

There are three more options to configure on the form:

- **Replace existing contractors** – if you set this parameter to **Yes**, the system will replace existing contractors with the imported ones;
- **Add missing values to the objects** – if this parameter is set to **Yes**, the fields from the import file will be automatically added to the missing values of ELMA objects;
- **View first 100 items only** – if you set this parameter to **Yes**, the number of items displayed on the **Import** page (2nd import step) will be limited to 100.

Once you've filled in all the fields, click **Next Step** on the top toolbar. If the import was successful, the **Import** page will be displayed with all the data imported from the Excel file (Fig. 312).

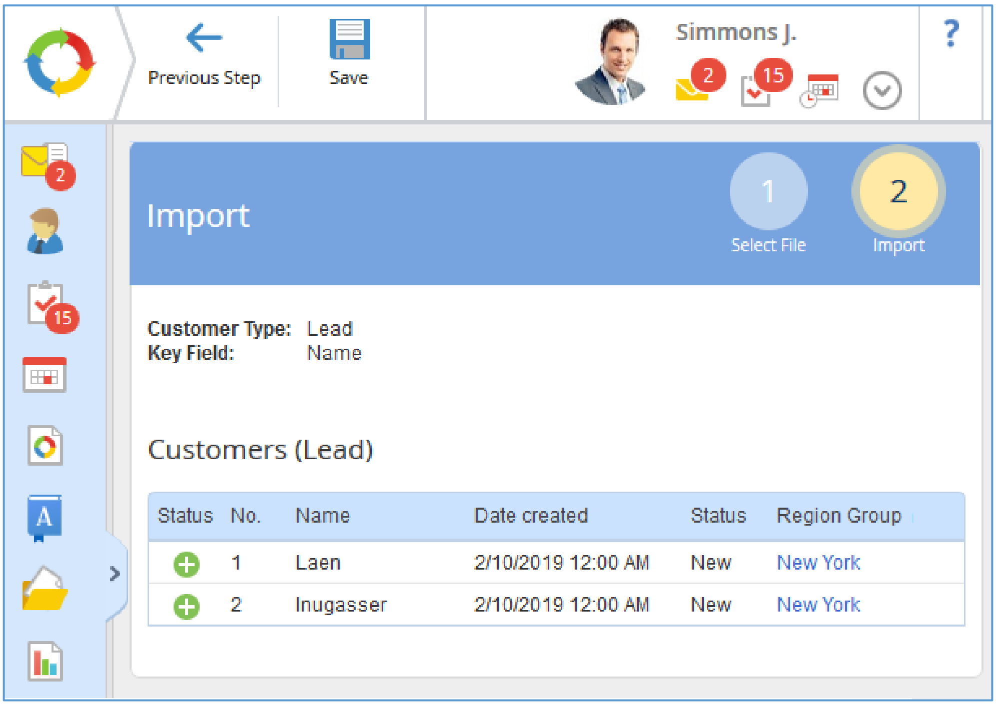


Fig. 312. Results of the successful import

If the file template for import was not filled out correctly or the required fields were not filled in, the **Import** page will be displayed with the corresponding error message in the **Import log** section (Fig. 313).

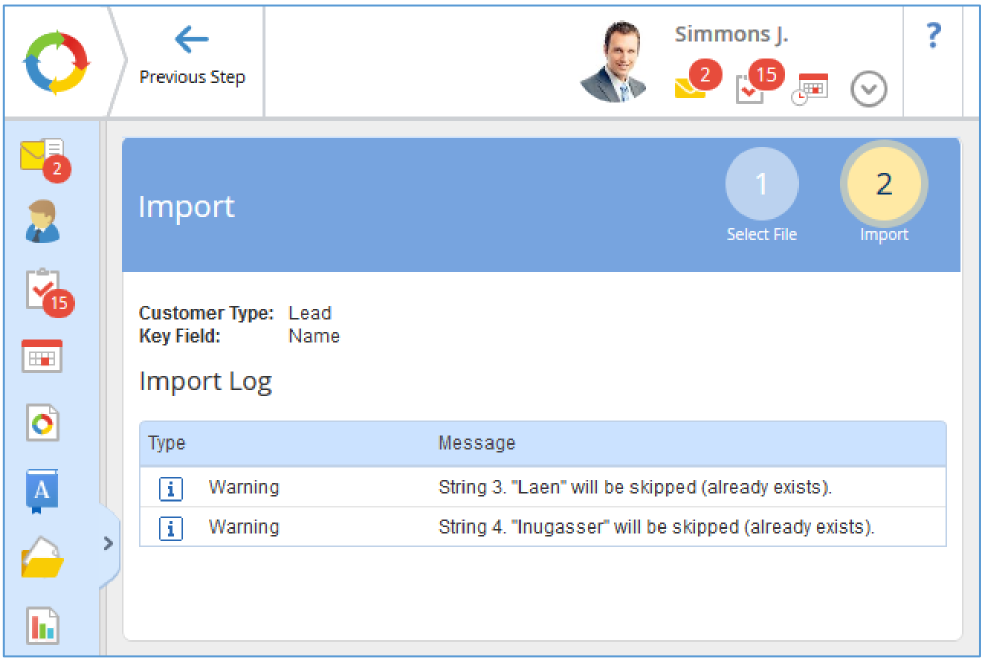


Fig. 313. Results of the unsuccessful import

To re-import a file, go back to the **Select File** page (Fig. 311), make necessary corrections to the template and repeat all import steps.

When the file is successfully imported (Fig. 312), click the **Save** button. After that, the **Leads** section will open where you will see the imported objects of the **Lead** type (Fig. 314).

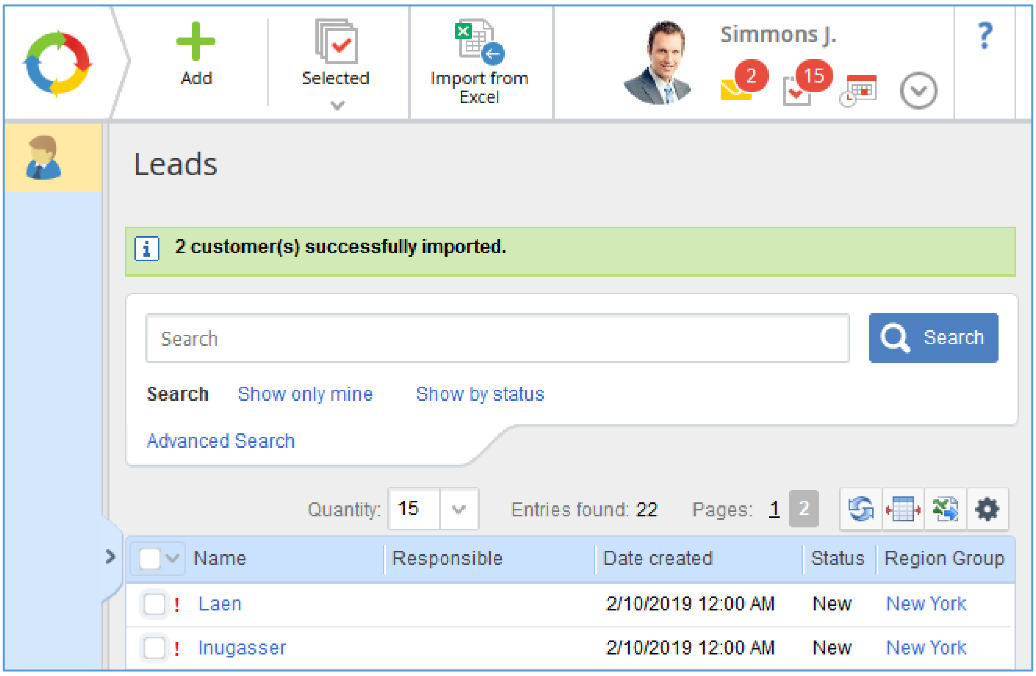


Fig. 314. Imported leads

In addition, the business process 'Lead Upload' can be implemented into the system. It can be started either manually or automatically, for example, by timer. The business process can address the lead storage system (CMS-system, e-mail, etc.), import leads to ELMA with specified frequency. Note that there is no one solution – they all entirely depend on the system used to collect leads.

9.1. Using ELMA CRM+ in Other System Applications

ELMA CRM+ objects are used not only in this application, but also in other sections of the ELMA system, and relate not only to sales.

Consider as an example the **Contractor** object. This is a default **ELMA BPM** object, however with the **ELMA CRM+** module installed, you can do much more both with this object type and with the **CRM** section, on the whole.

A company and a contractor build up bilateral contractual relationships. All documents, contracts, sent and received letters require registration. **ELMA ECM+** provides convenient tools for this. Once a document is registered, all the information is logged into the system (Fig. 315). A contractor's page, in turn, can display signed documents. Depending on the document type and the current configuration, the set of page attributes of various documents and their appearance may vary. To learn more about the **ELMA ECM+ application**, see the ELMA ECM+ Application Quick Start or the ELMA Help.

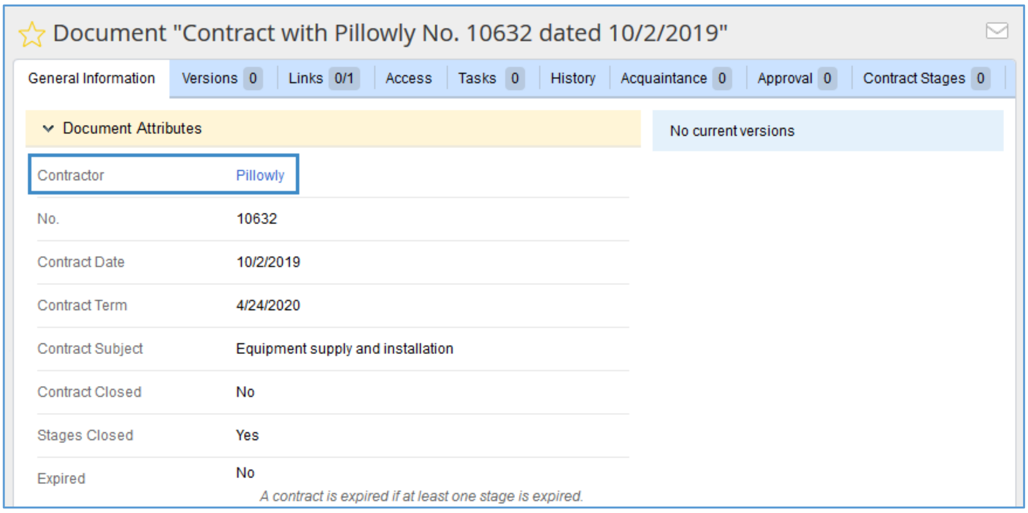


Fig. 315. Example of document page with the contractor field

You can also use the **Contractor** object in the **Projects+** app. This app helps to control project completion, manage resources and establish communication between project participants. The **Contractor** object may represent a customer, that is, a company or an individual interested in achieving project goals. In other words, the customer is the future owner of the project results. He/she defines the basic project requirements and funds the project.

In Fig. 316 you can see an example of a project creation page. In another configuration, there might be other fields and they might look differently. You can learn more about the **ELMA Projects+** features in this User Manual and in ELMA Help.

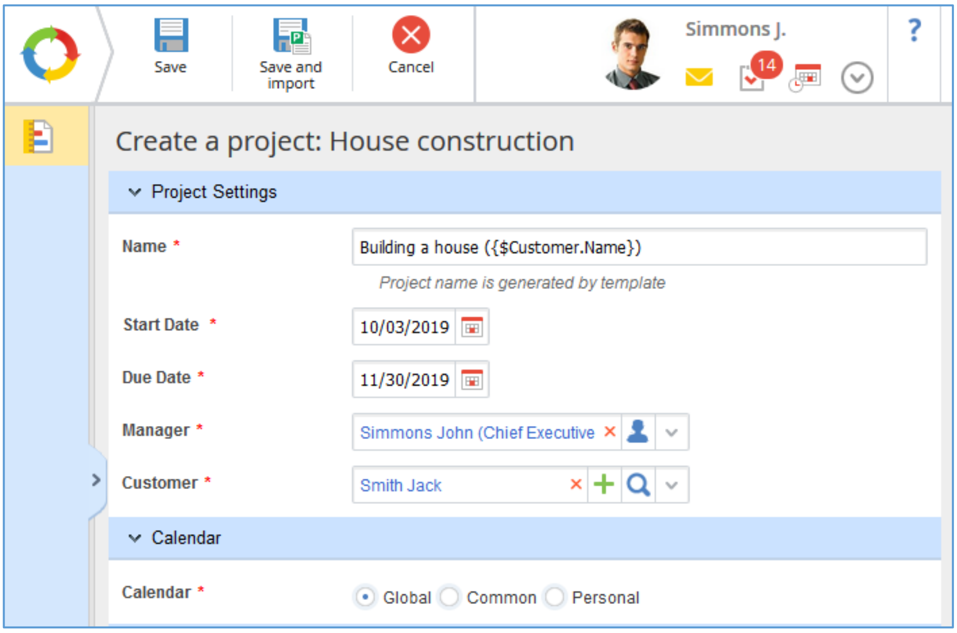


Fig. 316. Example of a project creation page

Besides, an object of the **Contractor** type can be used in the **ELMA KPI** app. Imagine a company selling cars via a dealer network. In each dealership, there are plan KPIs for managers: to sell 15 cars per month (margin is not taken into account). Therefore, if a sales rep hits the target, the company gets at least 15 new customers who will not only buy a new car, but also use warranty and other services, which will bring in extra profit. For more details on **ELMA KPI,** read ELMA KPI User Manual and Help.

ELMA BPM Platform cannot go unmentioned either, since it is the basis for all other applications. To find out more, read ELMA BPM Platform User Manual, Web Portal User Manual and the Help section. **ELMA BPM Platform** helps automate business processes that you start before and after sale. This might be business processes of presale or after-sales services: newsletters about new products and services, phone calls during which they ask you to evaluate the company's service, launching a loyalty program. Take the car dealer example: this might be a trade-in program, an invitation to a test drive, selling accessories to regular customers at a big discount. All these actions can be implemented as business processes.

Moreover, to provide exceptional customer service and deliver beyond customer's expectations, you should involve the whole company in the sales process. Not only sales people, but also all company's department should run like a clockwork. Business processes help establish cross-departmental communications. The level of customer loyalty directly depends on the level of business process maturity in your company.

To sum up, **ELMA CRM+** is an integral part of a full-fledged business management solution since any commercial company is primarily customer-oriented.

Chapter 10. Useful Resources

In addition to the current **ELMA CRM+** user manual, you can read similar editions that describe the main features of other **ELMA** applications:

- ELMA BPM Platform User Manual
- Web Portal User Manual
- ECM+ Application Quick Start
- ELMA Projects+ User Manual
- ELMA KPI User Manual

These manuals will introduce the readers to the key features of the system. If you want a detailed and comprehensive description of the ELMA functionality, refer to the Help Center, which is freely available via the link.

Help materials for each application are divided into three categories: User Guide, Implementation Guide, and Administrator Guide. This helps you quickly find necessary information.

You can find the general description and purchase conditions for our applications on the **ELMA website**. If you have any questions, feel free to ask us. Click the **Ask a question** button on the right-hand side of the page.

The Online Demo http://demo.elma-bpm.com demonstrates the main functions and utilization of the applications. If you want to learn more about any of the applications, download a demo with the same settings as in the online version using the same link.

We continuously develop **ELMA** and new platform-based components for coping with more specific tasks. You can find these ready-to-use components and their purchase conditions in **ELMA Store**.

If you want to develop your own solutions, the ELMA Knowledge Base materials might come in handy.

If technical issues arise while working in the system, you can refer to the ELMA technical support website.

If you are seeking advice on the system or have questions about partnership with ELMA, please contact us:

- Luxemburg: + (353) 20-30-11-40