

10. harjutustund – Open ERP CRM mooduli kasutamine

Kava

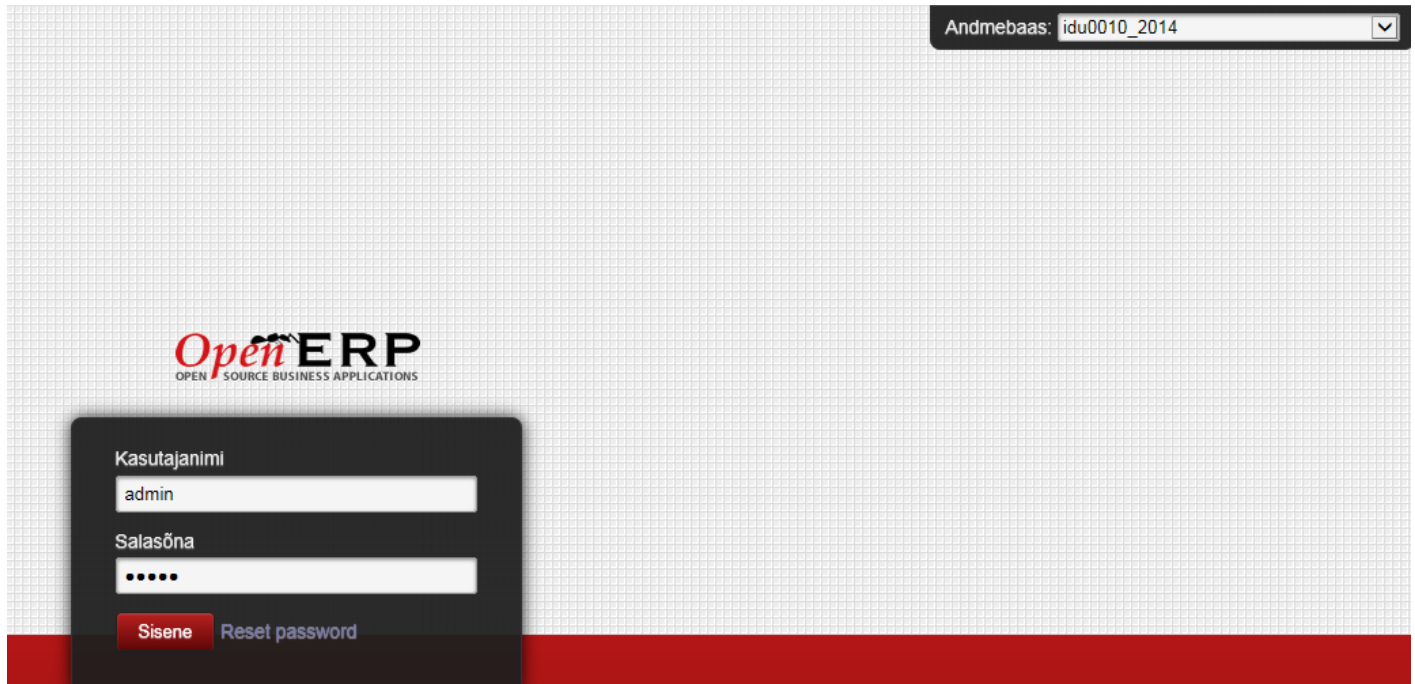
- Seadistamine
 - Kasutaja loomine
 - Sidumine firmaga
 - Kasutaja õiguste loomine
- CRM harjutus
 - Uue küsimuse registreerimine
 - Uue telefoni kõne registreerimine
 - Uue võimaluse loomine
 - Uue tegevuse planeerimine
 - Hinnapakkumise loomine
 - Lisainfo lisamine võimalusele
 - Hinnapakkumise saatmine kliendile
 - Tulemuse sisestamine
 - Uue võimaluse planeerimine

Kasutaja loomine

Uue kasutaja loomine

Selleks tuleb minna aadressile http://193.40.244.76:8069/?db=idu0010_2014&ts=1415264223709#. Valida andmebaasi idu0010_2014

PS: Kodus on võimalik teha ülesannet terminali Ararat.ttu.ee kaudu



Ja sineda kasutajaga admin salasõna admin. See järel siseneda Settings leheküljele ja luua uue kasutaja nimega Nimi_Perekonnanimi

Save or Discard



Name

Eduard_Sevtsenko

Login

Eduard_Sevtsenko

Company

Eduard Company

Active



Preferences

Access

Eduard
Eduard Company

Create and Edit...

Language

English

Timezone

Receive Messages by Email

Incoming Emails and Discussions

Email

Default Sales Team

Signature

Valige harjutamiseks Company Eduard Company ja Määrake kasutaja õigused:



Name

Eduard_Sevtsenko

Send reset password link by email

Login

Eduard_Sevtsenko

Company

Eduard Company

Active



Preferences

Access Rights

Application

Sales

Manager

Project

Manager

Warehouse

Manager

Accounting & Finance

Financial Manager

Human Resources

Manager

Sharing

Administration

Access Rights

Usability

Multi Companies



Technical Features



Other

Contact Creation



Portal



Anonymous



Survey / User



Sisestage uue parooli:

Users / Eduard_Sevtsenko

Edit

Create

- Share
- Embed
- Change Password
- Assigned Tasks
- Timesheets per day
- Timesheets per account
- Costs to invoice
- Delete
- Duplicate

An invitation email c

http://193.40.244.76:8069?db=idu0



Eduard_Sevtsenko

Eduard_Sevtsenko

Loogige välja ja sisenege uue kasutajaga sisse:

Andmebaas: idu0010_2014

OpenERP
OPEN SOURCE BUSINESS APPLICATIONS

Kasutajanimi

Eduard_Sevtsenko

Salasõna

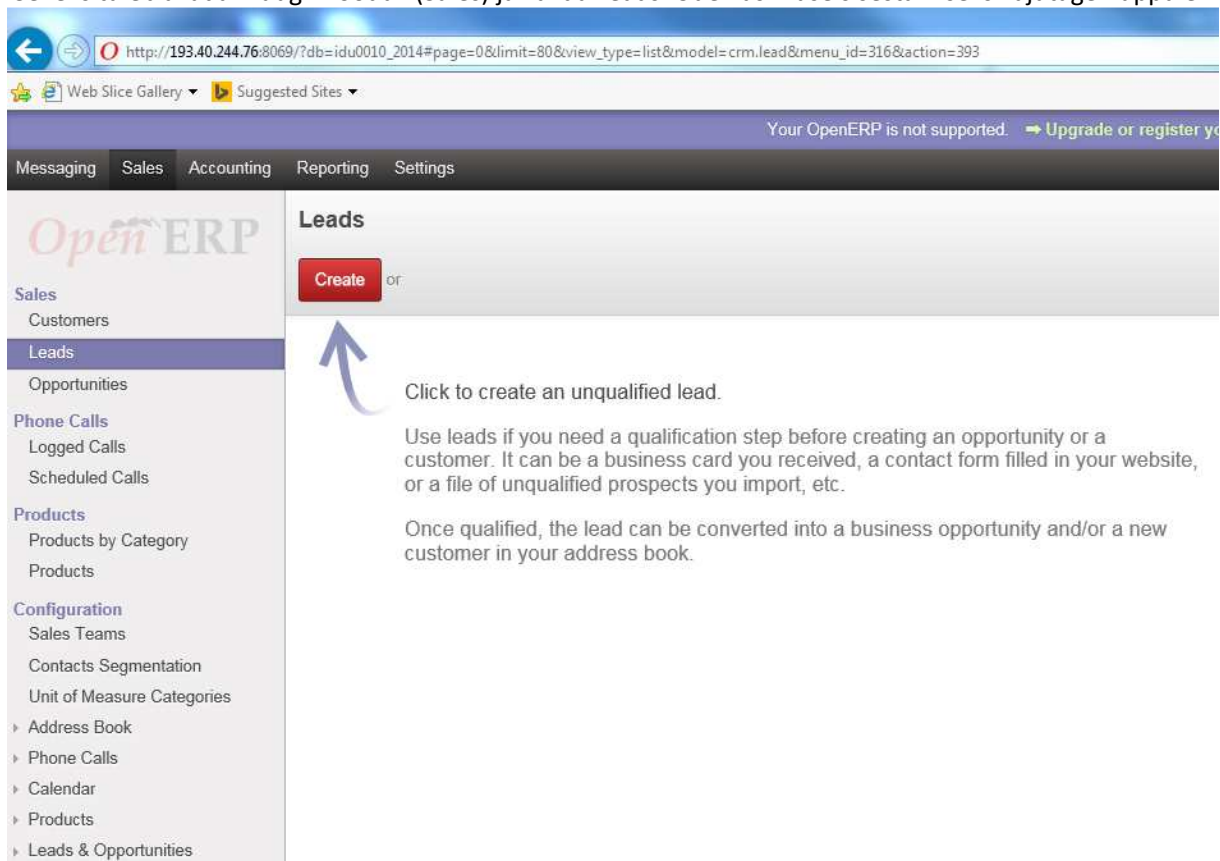
.....

Sisene

Reset password

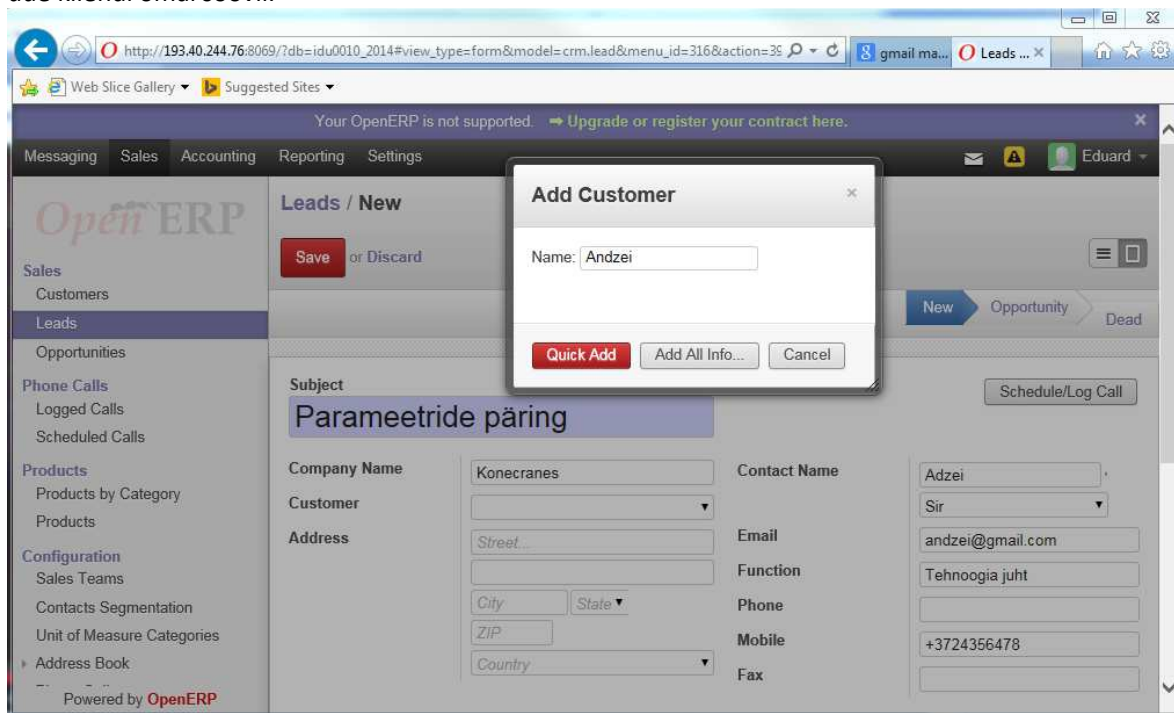
Uue küsimuse registreerimine

Selleks tuleb avada müügi mooduli (Sales) ja valida Leads. Uue küsimuse sisestamiseks vajutage nuppule Leads->Create.



The screenshot shows the OpenERP web interface. At the top, there is a navigation bar with 'Messaging', 'Sales', 'Accounting', 'Reporting', and 'Settings'. Below this is a sidebar menu with categories like 'Sales', 'Phone Calls', 'Products', and 'Configuration'. The 'Leads' menu item is highlighted. The main content area is titled 'Leads' and features a red 'Create' button. A blue arrow points to this button. Below the button, there is explanatory text: 'Click to create an unqualified lead. Use leads if you need a qualification step before creating an opportunity or a customer. It can be a business card you received, a contact form filled in your website, or a file of unqualified prospects you import, etc. Once qualified, the lead can be converted into a business opportunity and/or a new customer in your address book.'

Sisestage uue küsimuse. Kliendi info täitmisel CRM süsteem võimaldab luua uut klienti. Valime Add All Information ja lisame uue klienti omal soovil.



The screenshot shows the 'Leads / New' form in OpenERP. A modal dialog box titled 'Add Customer' is open in the center. The dialog has a text input field for 'Name' containing 'Andzei'. Below the input field are three buttons: 'Quick Add' (red), 'Add All Info...' (grey), and 'Cancel' (grey). The background form is partially visible, showing fields for 'Company Name' (Konecranes), 'Contact Name' (Adzei), 'Customer' (Sir), 'Email' (andzei@gmail.com), 'Function' (Tehnoloogia juht), 'Phone' (+3724356478), and 'Address' fields. The 'Subject' is 'Parameetride päring'.

Andmete sisestamise CRM palub lisada kliendiga seotud firmat, looge uue firma. Valime Quick Add ja see järel sisestame uue küsimuse, tema prioriteedi ja valime kategooriad millega paring on seotud.

Subject

Schedule/Log Call

Tehniline päring

Company Name

Adzei

Contact Name

Adzei

Customer

Konecranes, Adzei

Sir

Address

Street...

Email

andzei@gmail.com

Function

Tehnologia juht

Phone

Mobile

+3724356478

Fax

Salesperson

Eduard

Priority

High

Sales Team

Categories

Product x Information x
Consulting x

Internal Notes

Extra Info

Tere,
Soovin teada kas teil on pakkuda kraana mis on võimeline tõsta kuni 10t. Mis variandid on pakkuda?

Tervitab,
Adzei

Send a message or Log a note



Opportunity created

- **Partner:** Konecranes, Adzei
- **Stage:** New
- **Expected Revenue:**
- **Salesperson:** Eduard



Eduard updated document - vähe kui minuti eest - like

Following

- Opportunity Won
- Opportunity Lost
- Discussions
- Stage Changed
- Lead to Opportunity
- Lead Created

Uue telefoni kõne registreerimine

Harjutame uut kõne sisestamist. Sisestage Uue Kõne, täpstsustage kõne detailid, ja sisestage kõne sisu.

Schedule/Log Call

Action	<input type="text" value="Log a call"/>	Partner	<input type="text" value="Konecranes, Adzei"/>
Call summary	<input type="text" value="Tehniline päring"/>	Phone	<input type="text" value="+3724356478"/>
Type	<input type="text" value="Outbound"/>		

Täpsustasin töötingimused Adziilt. Kraana tuleb paigaldada tootmishoonesse.

or

Uue võimaluse loomine

Kui te näete et küsimusest võib tekkida müügivõimalus on võimalik küsimuse konverteerida võimaluseks. Selleks tuleb valida Leads->Convert to Opportunity

Convert to opportunity

Conversion Action	<input type="text" value="Convert to opportunity"/>
-------------------	---

Opportunities

Related Customer	<input type="text" value="Link to an existing customer"/>
Customer	<input type="text" value="Konecranes, Adzei"/>

or

Uue tegevuse planeerimine

Selleks et arutada kuidas minna kliendiga edasi planeerime kokku saamis kliendiga. Selleks kasutame nuppu Meeting.

Tehniline päring

0.00 € at 0%

Schedule/Log Call

Meeting

Customer
Konecranes, Adzei
Email
andzei@gmail.com
Phone

Next Action
11/04/2014
Expected Closing
Priority
High

Salesperson
Eduard
Sales Team

Categories
Product Information Consulting

Internal Notes

Lead

Tere,
Soovin teada kas teil on pakkuda kraana mis on võimeline tõsta kuni 10t. Mis variandid on pakkuda?

Tervitab,
Adzei

Save or Discard

Mark Won

Mark Lost

Convert to Quotation

Subject

Tehniline päring

Schedule/Log Call

Meeting

Expected Revenue

10000 € at 50 %

Customer
Konecranes, Adzei
Email
andzei@gmail.com
Phone

Next Action
11/05/2014
Meeting with customer

Expected Closing

Priority
High

Salesperson
Eduard
Sales Team

Categories
Product Information Consulting

Internal Notes

Lead

Tere,
Soovin teada kas teil on pakkuda kraana mis on võimeline tõsta kuni 10t. Mis variandid on pakkuda?

Tervitab,
Adzei

Peale koosolekut planeerige järgmist tegevust, näiteks panna kokku hinnapakkumist.

Hinnapakkumise loomine

Konverteerime võimalust hinnapakkumiseks. Selleks valime nuppu Convert to Quotation.
Loo uue hinnapakkumise.

Make Quotation

Customer:

Mark Won:

Create or Cancel

Avame uue hinnapakkumise:

Opportunities / Tehniline pä... / SO001

Edit Create

Send by Email Print Confirm Sale Cancel Quotation

Draft Quotation Quotation Sent Sales Order Done

Quotation SO001

Customer: Konecranes, Adzei Date: 11/05/2014
Customer Reference:

Order Lines Other Information

Product	Description	Quantity	Taxes	Unit Price	Subtotal

Untaxed Amount : 0.00 €
Taxes : 0.00 €
Total : 0.00 €

Loo uus toode:

Add Product

Name:

Quick Add Add All Info... Cancel

Sisestame hinnapakkumise infot.

Quotation SO001

Customer

Konecranes, Adzei

Date

11/05/2014

Customer Reference

Order Lines

Other Information

Product	Description	Quantity	Taxes	Unit Price	Subtotal	
Kraan 10t	Kraan 10t	1.000	Tax 20.00%	10000.00	10000.00	

Add an item

Untaxed Amount : 10000.00 €

Taxes : 2000.00 €

Total : (update) 12000.00 €

Enne hinnapakumise ära saatmist andke oma oma võimalusele hinnangut. Arvestades turu olukorra hindame antud hinnapakumise edukust 50%-le.

Opportunities / Tehniline päring

Edit Create

Mark Won Mark Lost Convert to Quotation

Tehniline päring

10000.00 € at 50%

Schedule/Log Call Meeting

Customer: Konecranes, Adzei
Email: andzei@gmail.com
Phone:

Next Action: 11/06/2014 - Hinnapakumise koostamine
Expected Closing:
Priority: High

Salesperson: Eduard
Sales Team:

Categories: Product Information Consulting

Internal Notes Lead

Tere,
Soovin teada kas teil on pakkuda kraana mis on võimaline tõsta kuni 10t. Mis variandid on pakkuda?

Tervitab,
Adzei

Lisainfo lisamine võimalusele

Täidame lisaandmed võimaluste kohta.

Your OpenERP is not supported. → Upgrade or register your contract here.

Messaging Sales Project Accounting Warehouse Human Resources Reporting Settings

OpenERP Opportunities

Create or Add a new column

New	Qualification	Proposition	Negotiation	Won
Expected Revenues: 10000.00	Expected Revenues: 0.00	Expected Revenues: 0.00	Expected Revenues: 0.00	Expected Revenues: 0.00

Tehniline päring - 10000.00 EUR
Konecranes, Adzei
11/06/2014 : Hinnapakkumise koostamine

Subject: **Hinnapakkumise esitamine** [Schedule/Log Call] [Meeting]

Expected Revenue: 10000 € at 50 %

Customer: Konecranes, Adzei | Next Action: 11/09/2014 | Kliendi vastuse saamine

Email: andzei@gmail.com | Expected Closing: | Priority: Normal

Phone: | Categories: |

Salesperson: Eduard

Sales Team: |

Internal Notes | Lead

Võimaluste vaade näeb välja järgmiselt:

Opportunities

Create or Add a new column

New	Qualification	Proposition	Negotiation	Won
Expected Revenues: 10000.00	Expected Revenues: 0.00	Expected Revenues: 0.00	Expected Revenues: 0.00	Expected Revenues: 0.00

Tehniline päring - 10000.00 EUR
Konecranes, Adzei
11/06/2014 : Hinnapakkumise koostamine

Hinnapakkumise saatmine kliendile

Esitage hinnapakkumist kliendile emailiga. Ülesanne täitmiseks lisage email address Eduard.sevtsenko@ttu.ee

Lisage subject nimi.perekonnanimi Company Quotation

Recipients: Followers of SO001 and
 Konecranes, Adzei <andzei@gmail.com> x Eduard <eduard.sevtsenko@ttu.ee> x

Subject: Eduard Company Quotation (Ref SO001)

Hello Adzei,
 Here is your quotation from Eduard Company:
REFERENCES
 Order number: **SO001**
 Order total: **12000.0 EUR**
 Order date: 2014-11-05
 Order reference: Opportunity: 1
 Your contact: [Eduard](#)

You can access this document and pay online via our Customer Portal:

[View Quotation](#)

SO001_draft.pdf

Attachments

[Send](#) or Cancel

Use template: Sales Order - Send by Email (Portal) v
[Save as new template](#)

Juhul kui klient pole nõustunud hinnapakkumisega märkige et pakkumine on kaotatud
 . (Quotation Cancelled)

Quotations / SO001

Edit Create

New Copy of Quotation Draft Quotation Quotation Sent **Cancelled** Sales Order

Sales Order SO001

Customer: Konecranes, Adzei Date: 11/05/2014
 Customer Reference:

Order Lines Other Information

Product	Description	Quantity	Taxes	Unit Price	Subtotal
Kraan 10t	Kraan 10t	1.000	Tax 20.00%	10000.00	10000.00

Untaxed Amount : 10000.00 €
 Taxes : 2000.00 €
Total : 12000.00 €

See järel võimaluste all sisestage et võimalus on kaotatud (Mark Lost).

Open ERP Opportunities / Tehniline päring

Save or Discard

Mark Won Mark Lost Convert to Quotation

Subject: Tehniline päring

Expected Revenue: 10000.00 € at 50 %

Customer: Konecranes, Adzei

Email: andzei@gmail.com

Phone:

Salesperson: Eduard

Sales Team:

Next Action: 11/06/2014

Expected Closing:

Priority: High

Categories: Product: Information Consulting

Internal Notes Lead

Tere, Soovin teada kas teil on pakkuda kraana mis on võimeline tõsta kuni 10t. Mis variandid on pakkuda?

Tervitab, Adzei

Tulemuse vaatamiseks tehke "opportunity" all Unfold Lost Stage

Opportunities

Create or Add a new column

New	Qualification	Proposition	Negotiation	Won	Lost
Expected Revenues: 0.00	Expected Revenues: 0.00	Expected Revenues: 0.00	Expected Revenues: 0.00	Expected Revenues: 0.00	Expected Revenues: 10000.00
					Tehniline päring - 10000.00 EUR Konecranes, Adzei 11/06/2014 : Hinnapakkumise koostamine

Kokkuvõte

CRM moodul toetab suhtlemist kliendiga, võimaldab märkida kõik kliendihaldusega seotud tegevused, ja analüüsida tulemusi

Harjutused

Koostada iseseisvalt hinnapakkumist kliendile hinnaga 9500 EUR:

- Selleks kasutage Negotiation Opportunity.
- Konverteerige võimaluse Hinnapakkumiseks ja saatke hinnapakkumist kliendile
- Märkige võimalust võidetuks.

Reporting abil saate kontrollida, kas saadud tulemus on korrektne.

Materjalid

Kõik hüperlingid on seisuga 04.11.2014

- <http://www.youtube.com/watch?v=vgLjXhRE5bw>
- <https://www.youtube.com/watch?v=LgyEp3YUez4>
- <https://www.youtube.com/watch?v=ZawCH7Jp0HU>