

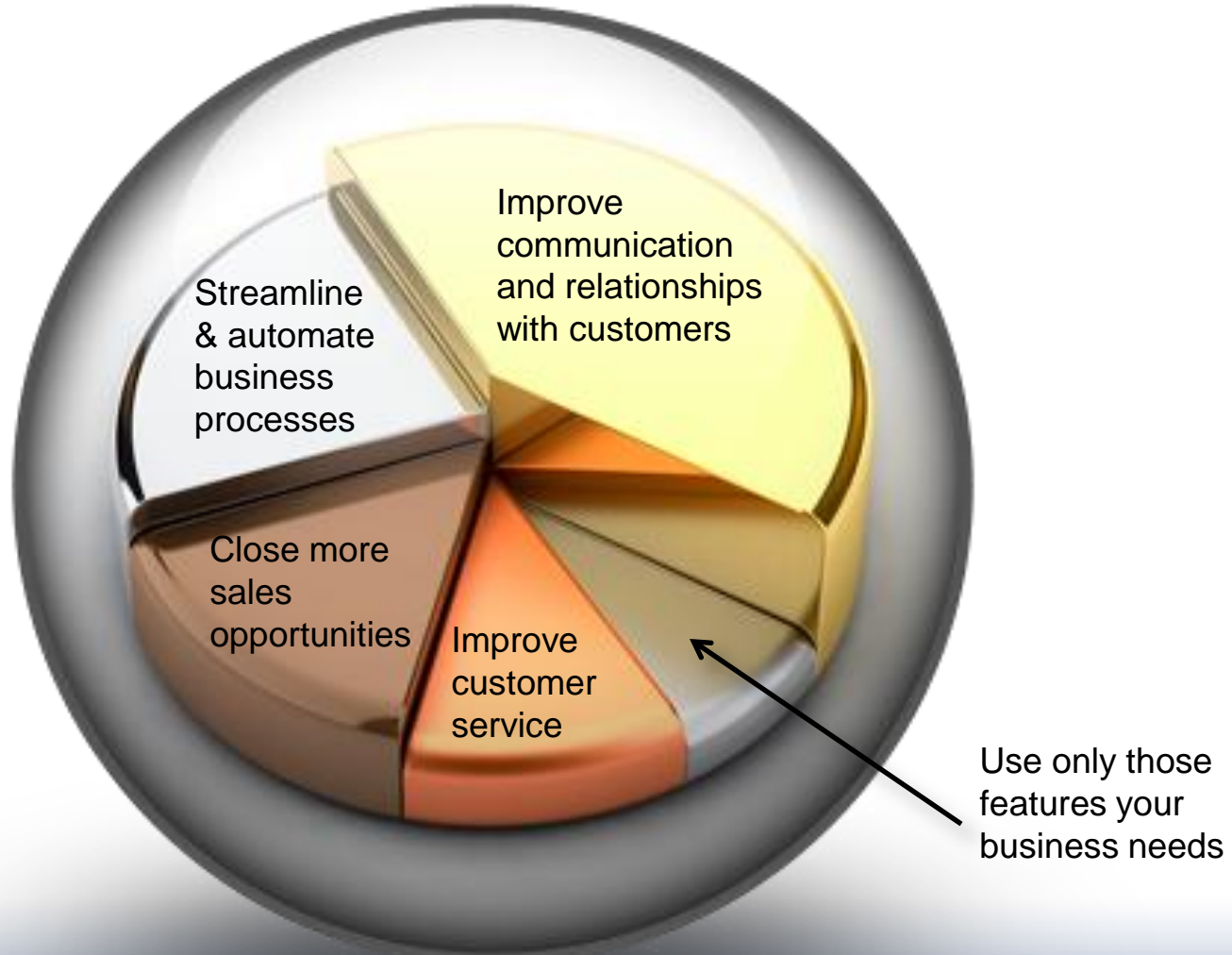


 **vtiger**
System Concepts

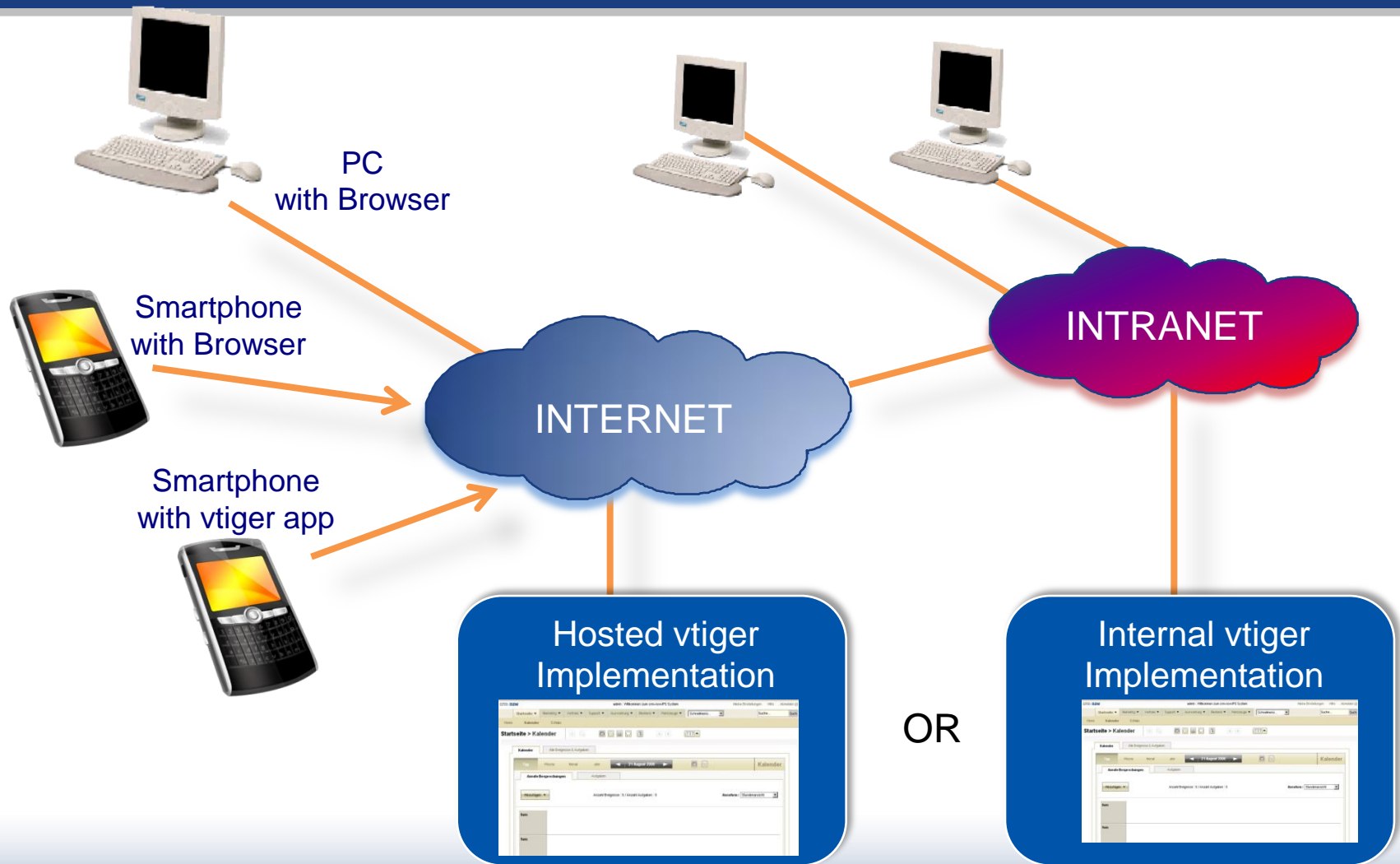
Provided By

 **Illuminetic**
Powered by crm-now

Why Use a vtiger System?



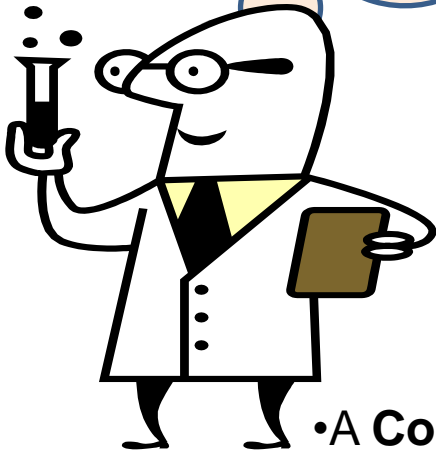
Vtiger Access options



Sales Process Concepts

Hints:

- Potentials are always related to a single Account or Contact
- Accounts can be related to each other (sub-accounts)
- Accounts may have an unlimited number of contacts



Account– A company or organization you want to keep information about.

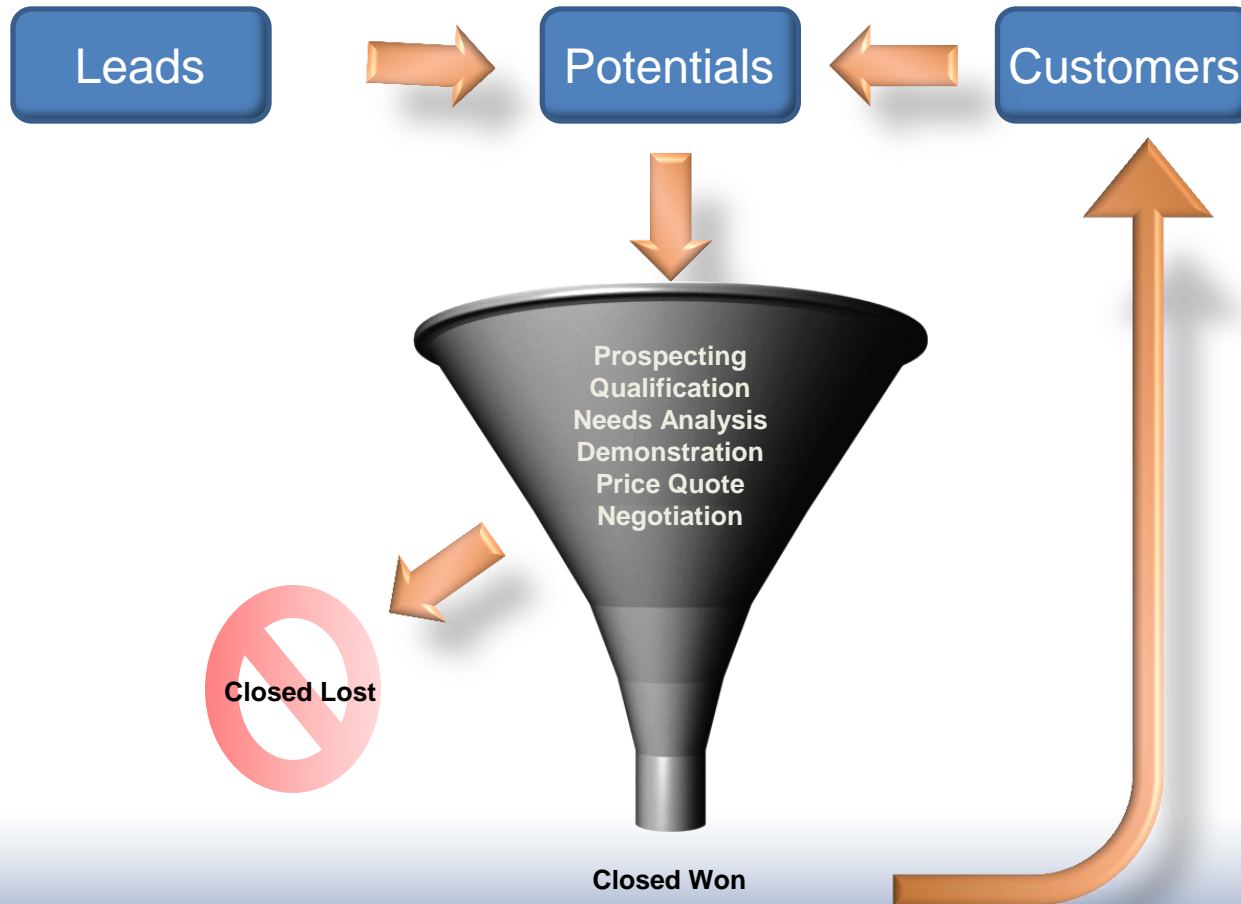
Lead – Non-qualified sales prospect

Contact– A person that you want to keep information about

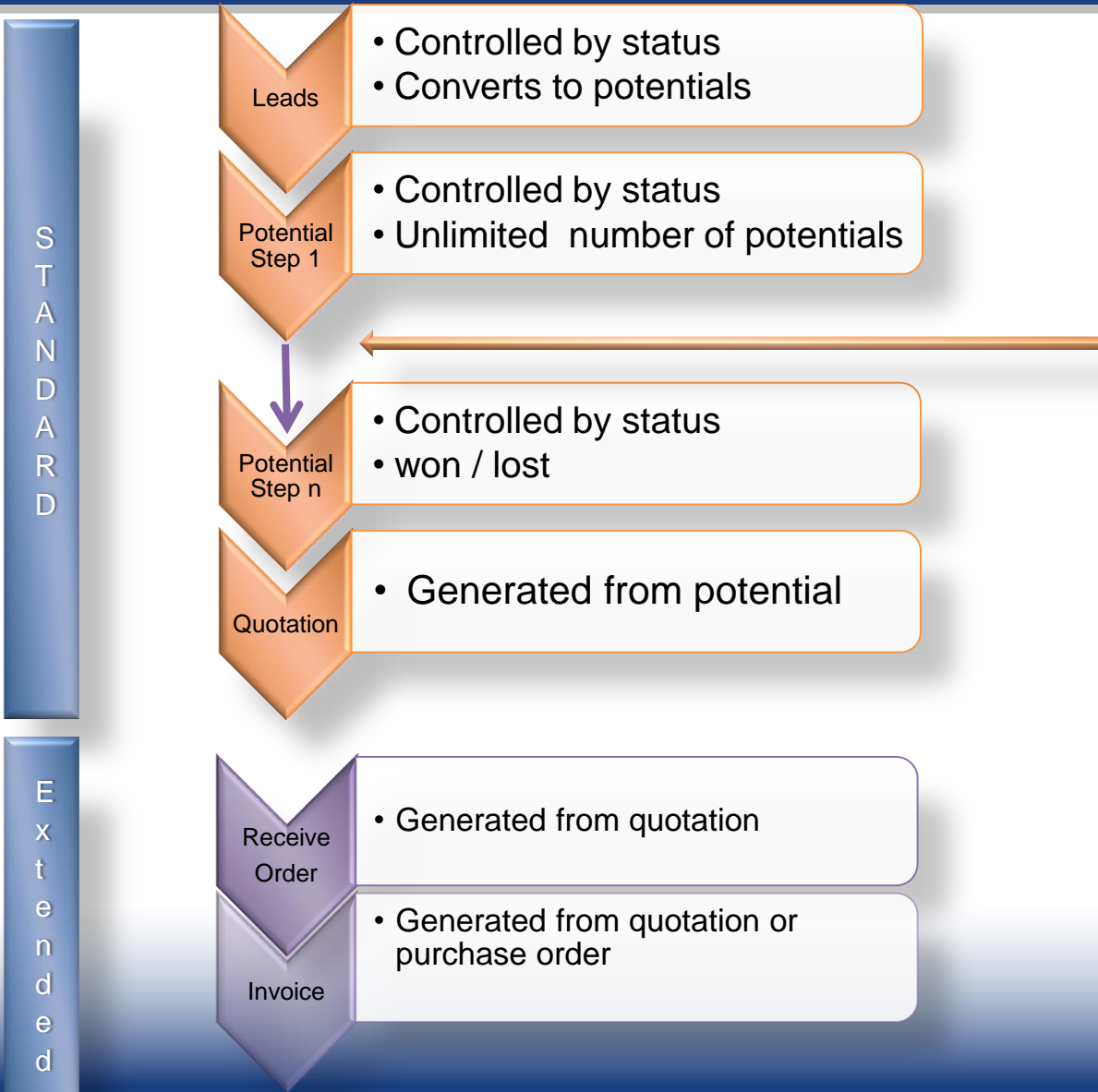
Potential– A specific sales opportunity

- A **Contact** may be associated with an **Account**
- A **Potential** is associated with either an **Account** or a **Contact**

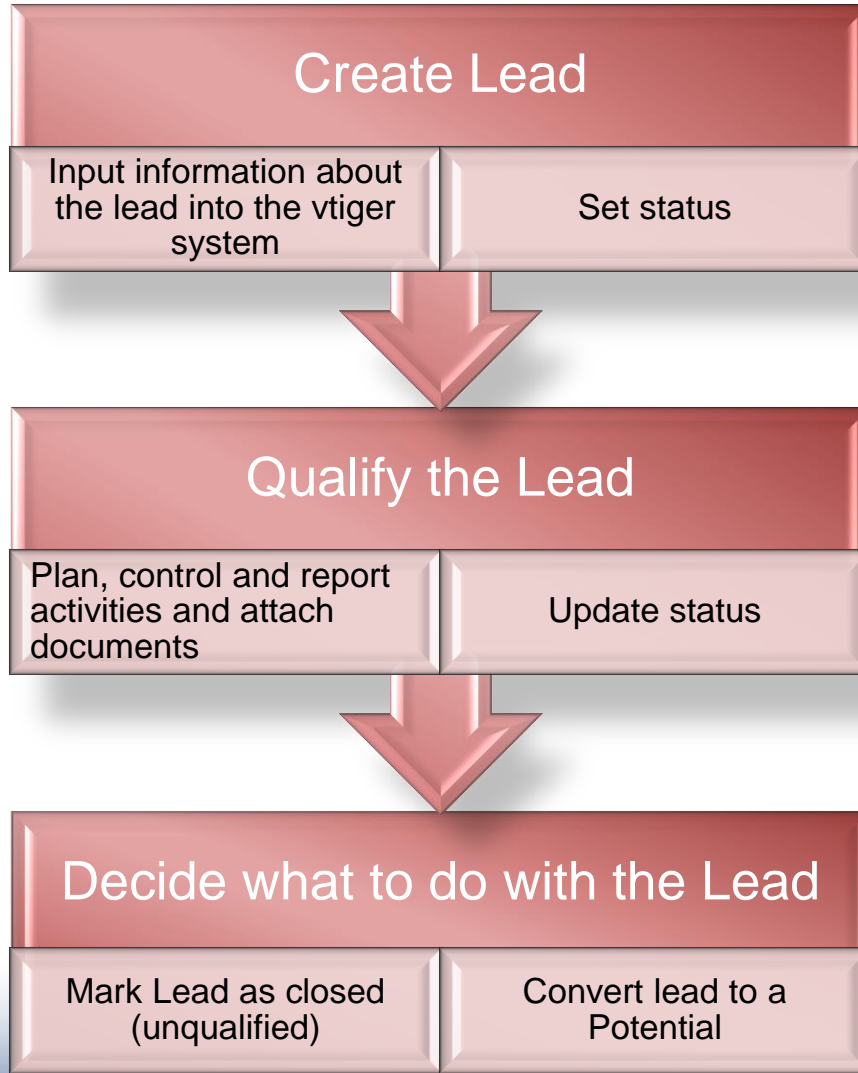
vtiger's Basic Sales Model



Sales Process: Steps

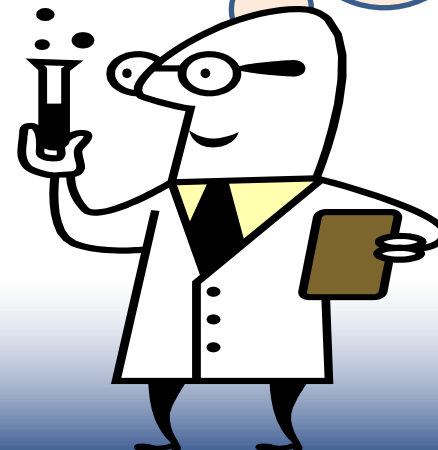


Each company the uses vtiger has its own processes/steps for their sales process

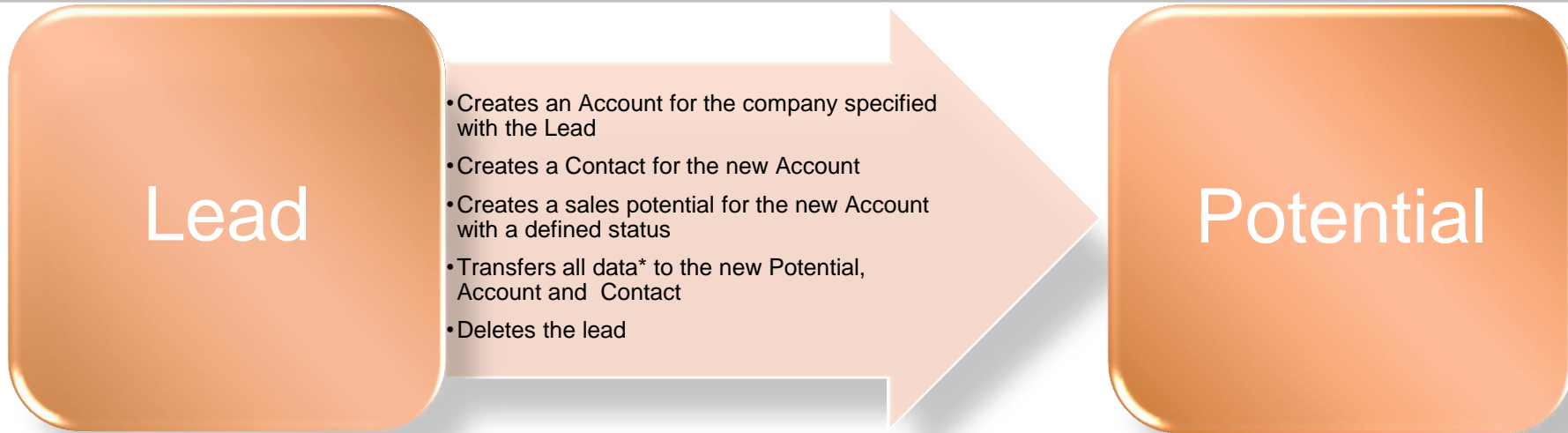


Hints:

- All fields for the master data can be customized by the vtiger system administrator
- Never delete a lead if you want to retain a good history. They often come back later!



Converting a Lead to Potential



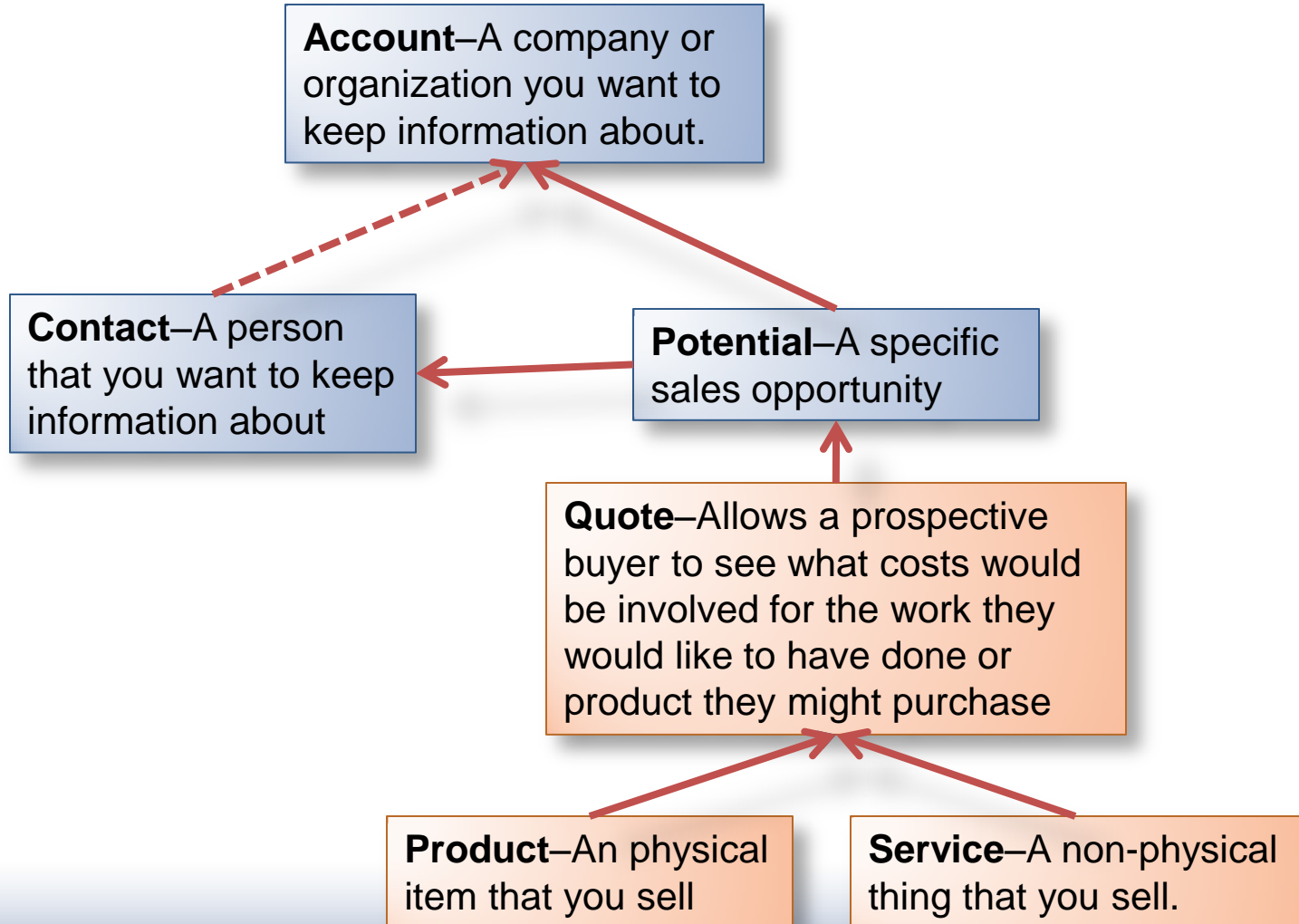
Advantages

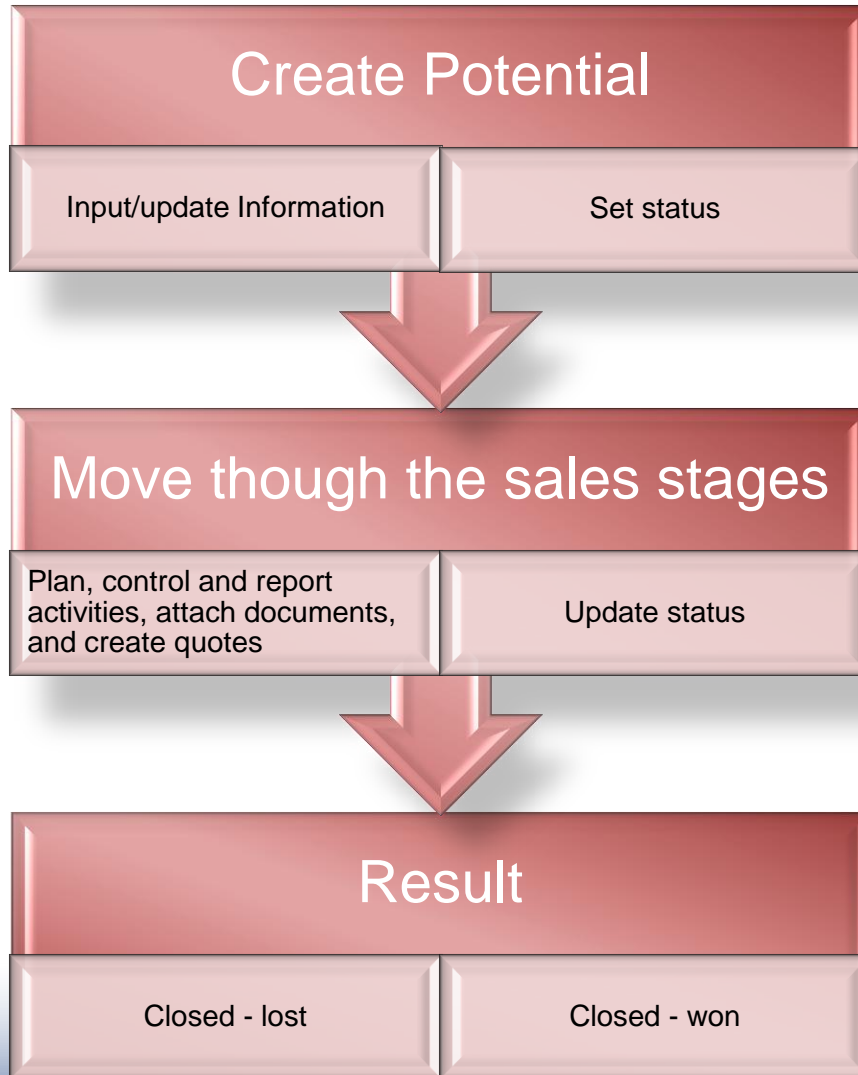
- Keeps non-qualified Leads separate from qualified ones
- Allows you to save non-qualified Lead information for future use
- Helps to organize the sales process and management reporting

Warning

* Custom fields are only transferred if permitted by the system administrator

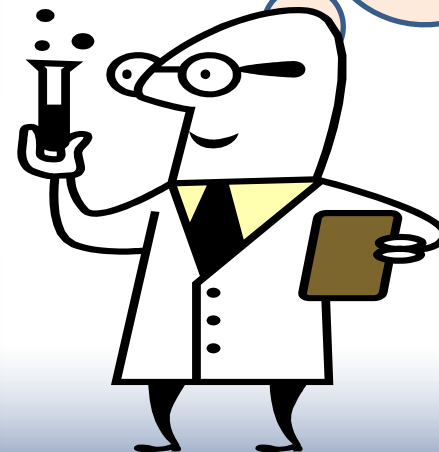
More Sales Process Modules



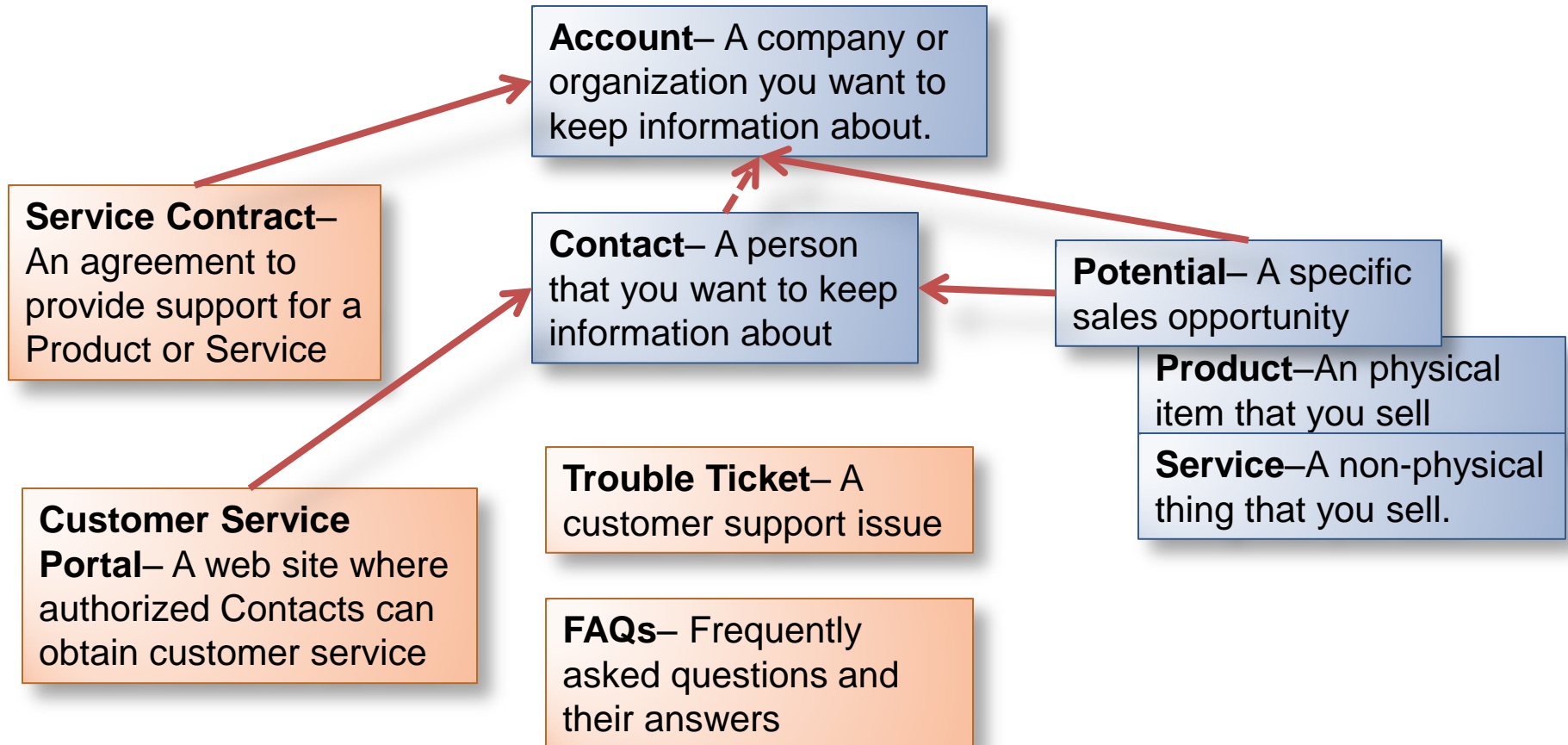


Hints:

- To follow best practices it is advisable to create Potentials from Leads or Accounts
- You may add an unlimited number of Potentials to an Account

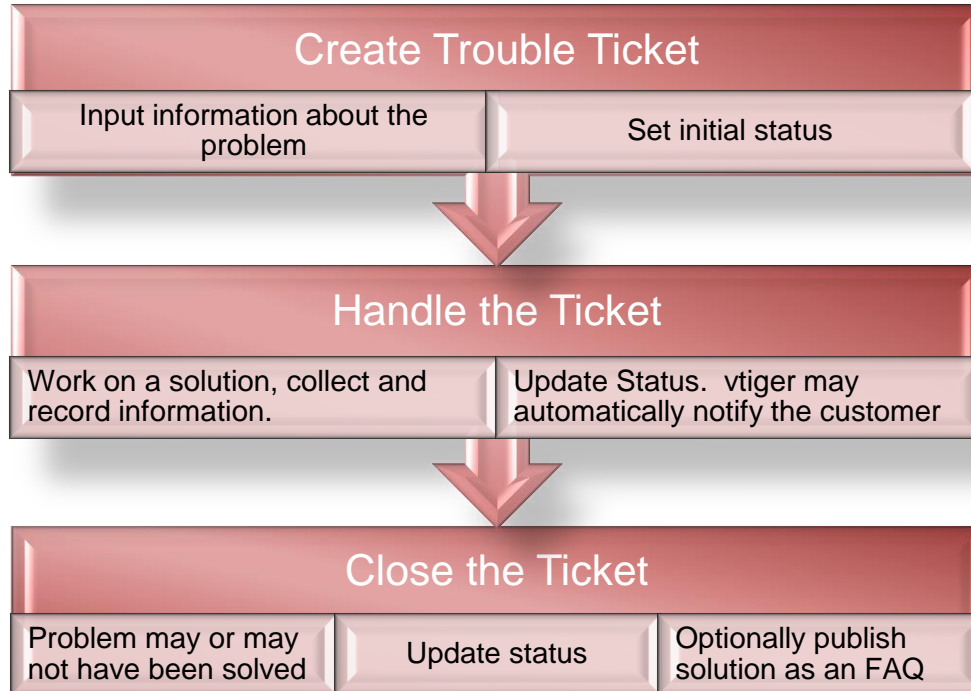


Provide Better Customer Care



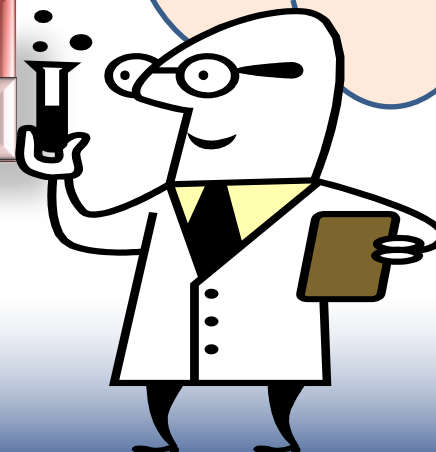
- Trouble Tickets and FAQ's are typically associated with a specific Product or Service.

Customer Support: Functions and Processes – Manually generated tickets

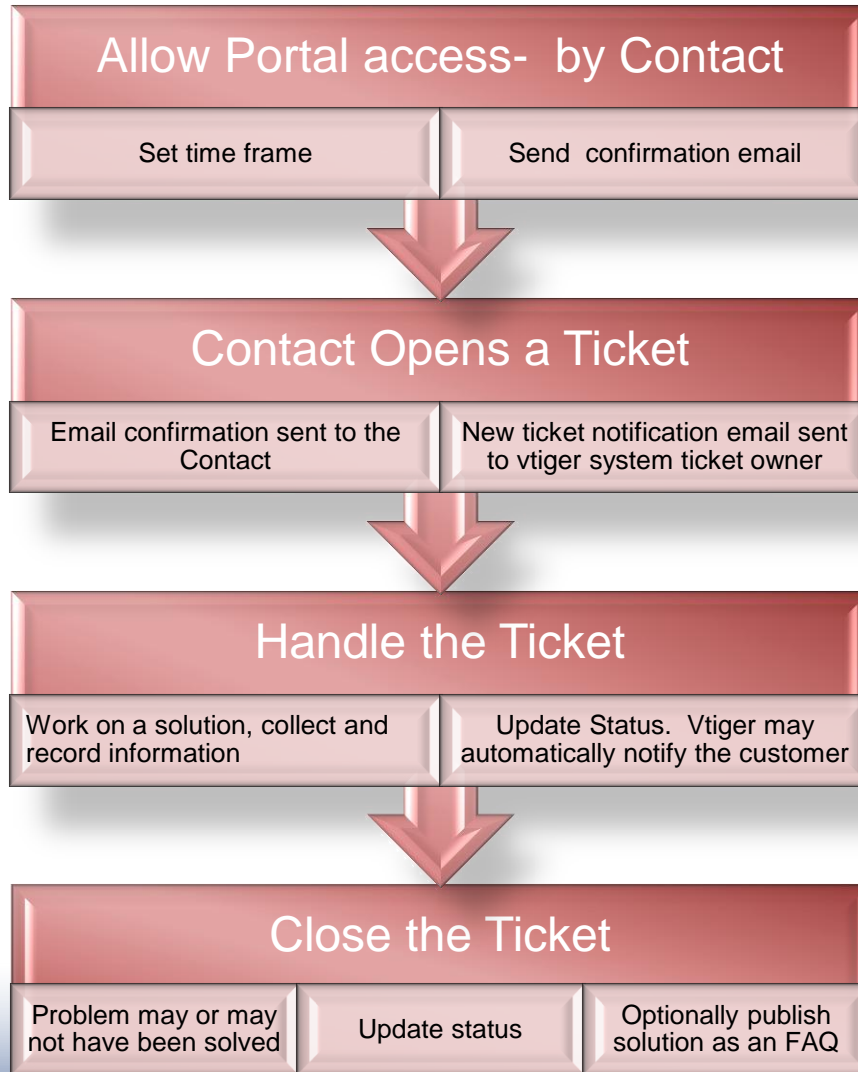


Hints:

- If a Trouble Ticket is assigned to an Account or a Contact automatic email updates are sent to the associated email address. Make sure you want this before associating with an Account or Contact
- Automatic email updates are also sent to the vtiger system Trouble Ticket manager.
- Emails are generated when the ticket is opened, closed, or a comment or solution is added

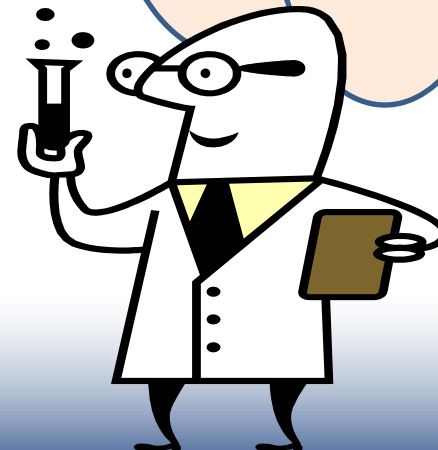


Customer Support: Functions and Processes – Portal generated tickets



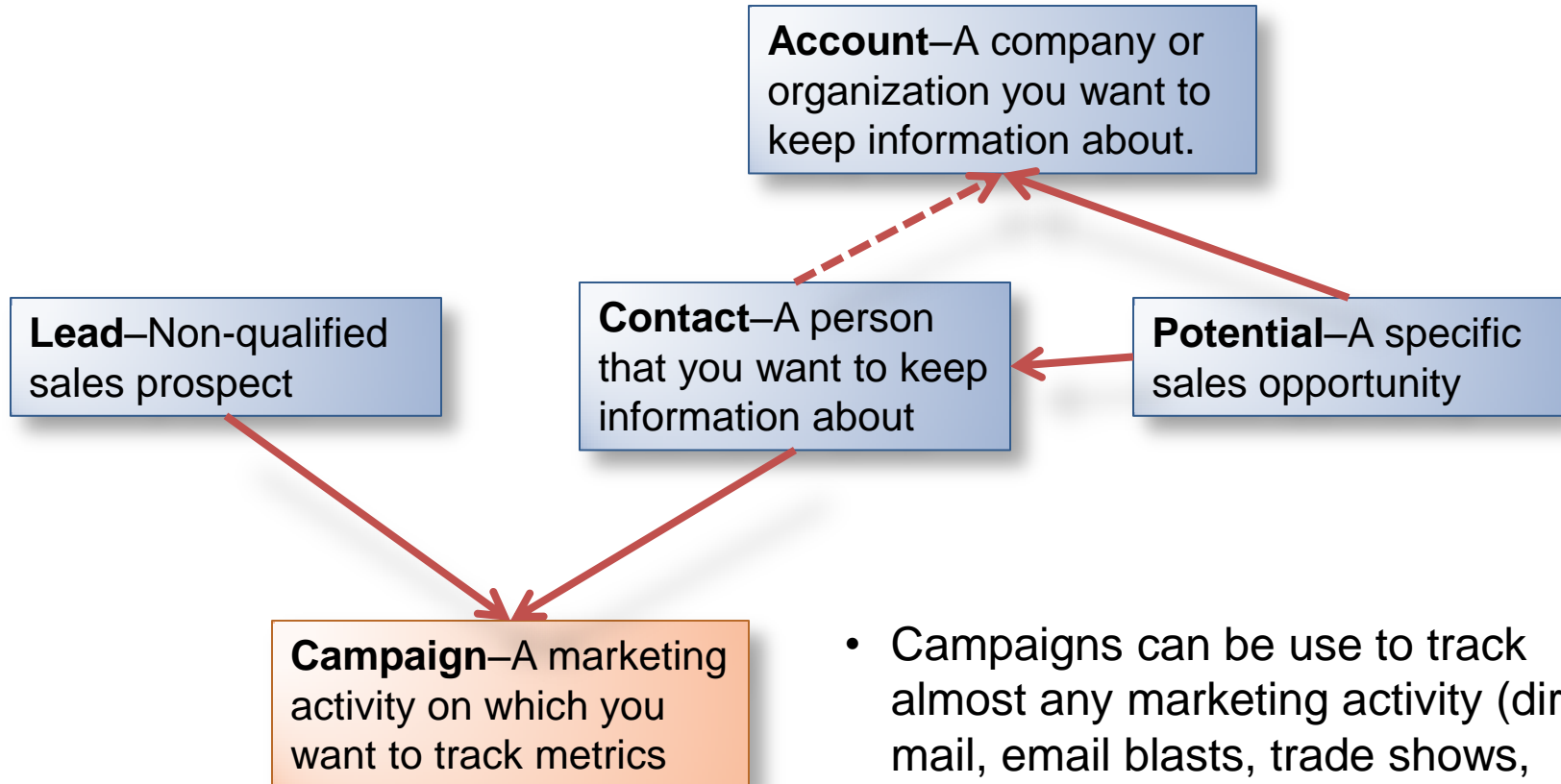
Hints:

- Automatic email updates are sent to the Contact. To minimize messages, make multiple changes at the same time using the edit view.
- Automatic email updates are also sent to the vtiger Trouble Ticket manager.
- Emails are generated when the ticket is opened, closed, or a comment or solution is added
- Published FAQs are presented at the customer portal



Manage Marketing Campaigns

Marketing Process Modules

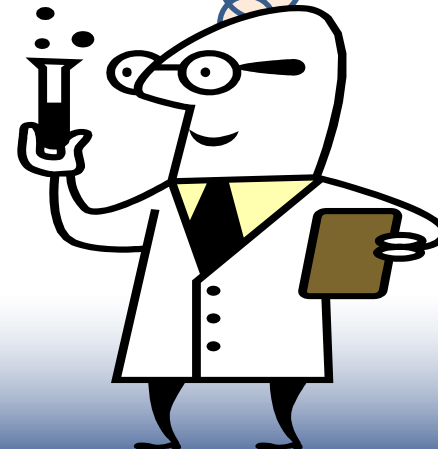


- Campaigns can be use to track almost any marketing activity (direct mail, email blasts, trade shows, advertising, seminars, etc.).



Hints:

- You can send email blasts directly from the vtiger system
- You can clone a Campaign and easily start another like it



Supply Chain Management

Supply Chain Related Modules

Vendor—A company or person you buy something from.

Price Book — A collection of Products and Services and their associated prices

Product—A physical item that you sell

Service—A non-physical thing that you sell

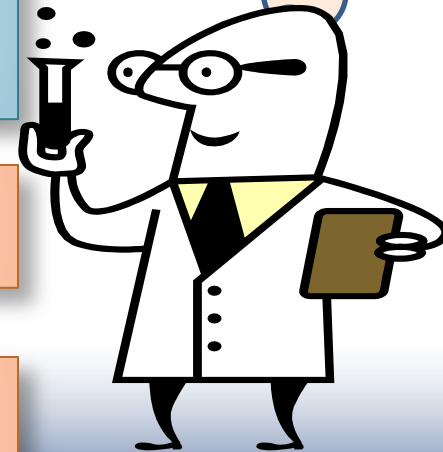
Hints:

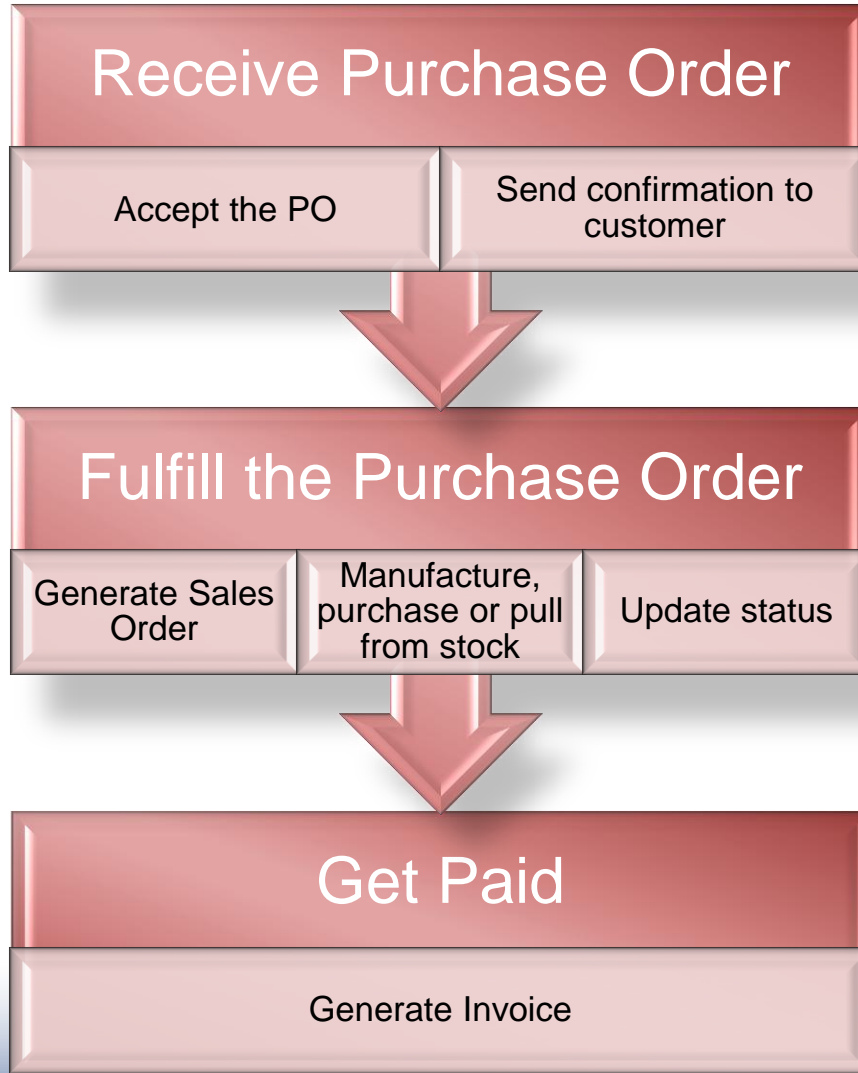
- You can create multiple Price Books for different market segments or currencies
- Use report functions to generate a price list

Quote—Allows a prospective buyer to see what costs would be involved for the work they would like to have done or product they might purchase

Sales Order—Tracks process of fulfilling an incoming purchase order

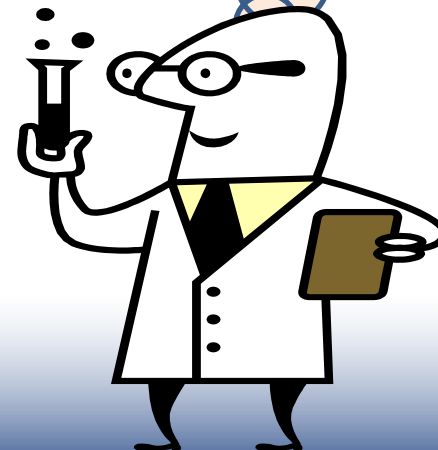
Purchase Order—Request sent to a vendor to buy something





Hints:

- Sales Orders and Invoices can be generated from Quotes
- Generate an automatic email when a Product inventory level drops below a specified threshold



Additional Tools and Features

Activity Types



Events (typically two or more people)



Emails



Tasks

Automatic Tracking and Association

Account—A company or organization you want to keep information about.

Contact—A person that you want to keep information about

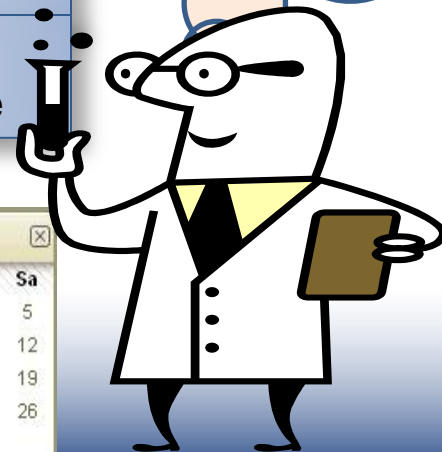
Potential—A specific sales opportunity

Lead—Non-qualified sales prospect

Trouble Ticket— A customer support issue

Hints:

- Don't enter calls/meetings as Tasks, they are Events
- Don't delete completed activities, mark them as Held or Completed.
- Don't create more status entries than you really want to track



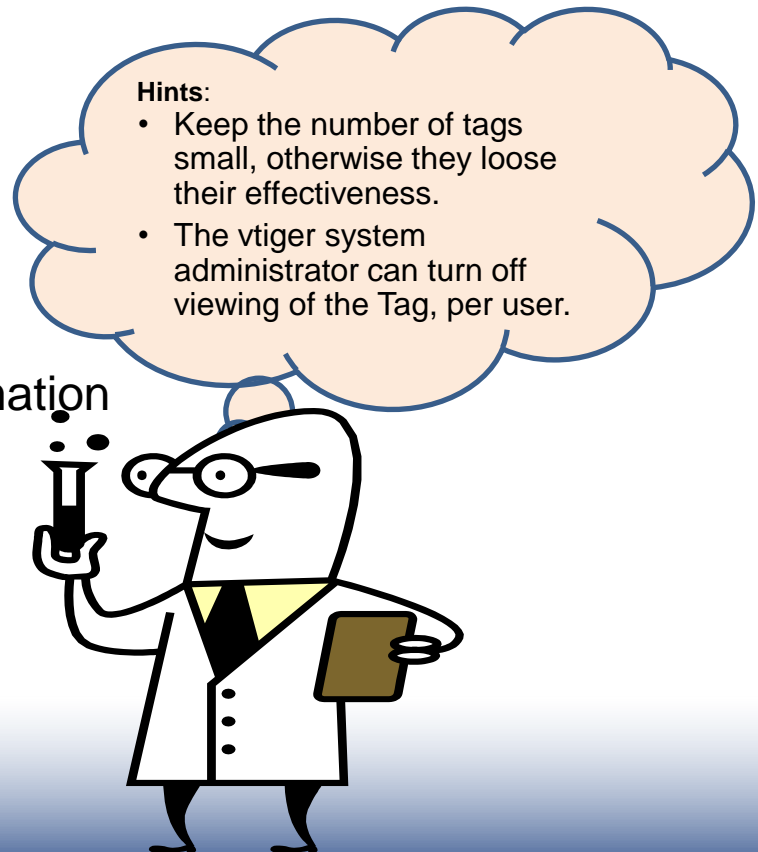
August 2006						
So	Mo	Di	Mi	Do	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		



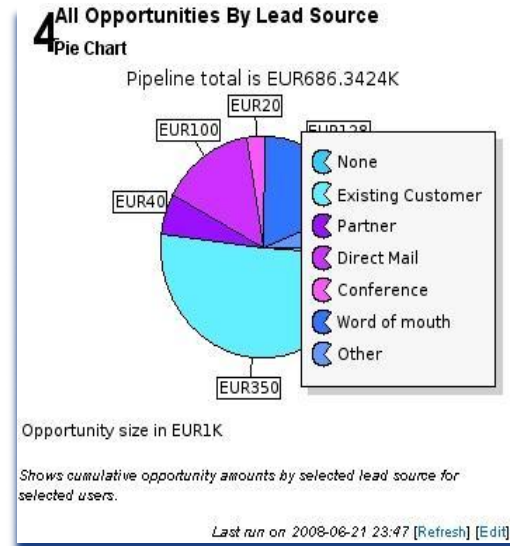
- Allows a collection of related items to be categorized (tagged) independent of information type.
- Information across record types, predefined structure can then be searched by Tag

Hints:

- Keep the number of tags small, otherwise they lose their effectiveness.
- The vtiger system administrator can turn off viewing of the Tag, per user.



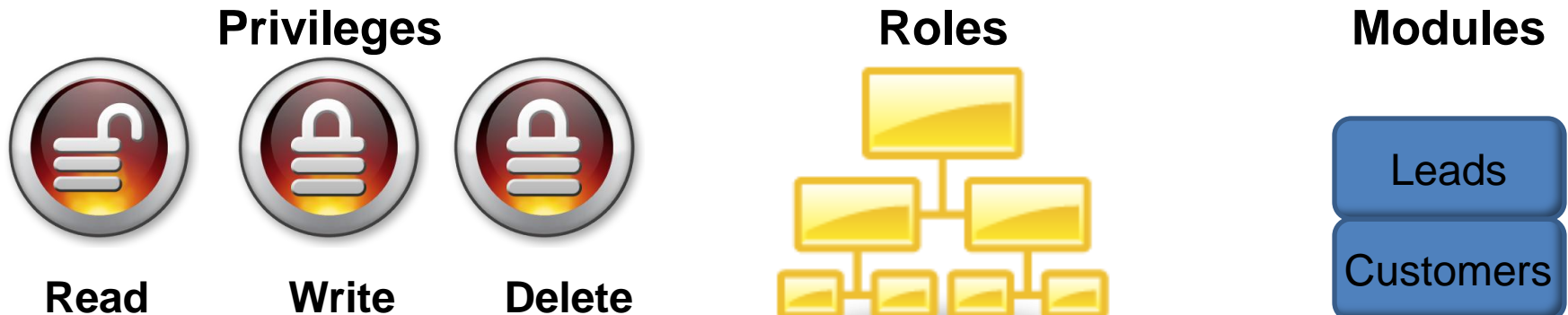
- Dashboards provide a graphical overview of key information related to the sales process.
- Reports can be used to get a more detailed view of key metrics
- Data can be exported from the system for use with Excel or a third party report writer.



Lead Status Report

Lead Status	First Name	Last Name	Company	Email
-	Mike	Gabbard	Gabbard OHG	Mike.Gabbard@Musterbetrieb.de
-	Andreas	Aall Moe	His-Knoas	Andreas.AallMoe@Musterbetrieb.de
-	Uwe	Gaatzmann	Schneckt gut AG	Uwe.Gaatzmann@Musterbetrieb.de
-	Daniela	Baadt	Anlageberatung Baadt	Daniela.Baadt@Musterbetrieb.de
-	Friedhelm	Jenerjahn	Bonbon AG	Friedhelm.Jenerjahn@Musterbetrieb.de
-	Werner	Hübauer	Hübauer AG	Werner.Hübauer@Musterbetrieb.de
-	Andreas	Sibaeus	Wandertreff eV	Andreas.Sibaeus@Musterbetrieb.de
Heiss	Isgrid	Raas	Sag Was GBR	Isgrid.Raas@Musterbetrieb.de
Heiss	Gabriele	Clauss	Rede Mt Mir	Gabriele.Clauss@Musterbetrieb.de
Heiss	Birgit	Paulman	Privatbank Geldweg GBR	Birgit.Paulman@Musterbetrieb.de
Heiss	Dirk	Ulbrich	Mach's Weg GmbH	Dirk.Ulbrich@Musterbetrieb.de
Heiss	Thomas	Gabalaka	Hot Air GmbH	Thomas.Gabalaka@Musterbetrieb.de
In der Zukunft kontaktieren	Rainer	Ulanowska	Ruhe Sanft Hotel	Rainer.Ulanowska@Musterbetrieb.de
In der Zukunft kontaktieren	Clolette	Baach	Creatio Ex Nihilo GmbH	Clolette.Baach@Musterbetrieb.de
In der Zukunft kontaktieren	Marlies	Ibeken	Zappelphilp AG	Marlies.Ibeken@Musterbetrieb.de
In der Zukunft kontaktieren	Manuela	Herberts	DNA	Manuela.Herberts@Musterbetrieb.de
In der Zukunft kontaktieren	Keneth	Pachach	Gaswerke Klein-Bingen	Keneth.Pachach@Musterbetrieb.de
In der Zukunft kontaktieren	Eric	Huppert	Kaschemne AG	Eric.Huppert@Musterbetrieb.de
In der Zukunft kontaktieren	Otto	Baake	Glückauf Taubenzichter eV	Otto.Baake@Musterbetrieb.de
Kalt	Markus	Gaartz	Auf-Draht	Markus.Gaartz@Musterbetrieb.de
Kalt	Ursula	Sebacher	Werbeagentur Sebacher	Ursula.Sebacher@Musterbetrieb.de
Kalt	Hölger	Becher	Krankenhaus zur letzten Ruhe	Hölger.Becher@Musterbetrieb.de
Kalt	Ingrid	Raas	Lange Leben KG	Ingrid.Raas@Musterbetrieb.de
Kalt	Tamara	Ibefings	Abendschule für Legastheniker	Tamara.Ibefings@Musterbetrieb.de
Kalt	Torsten	Ulrich	Peanuts Bank	Torsten.Ulrich@Musterbetrieb.de
Kontaktiert	Christoph	Haacken	Farbwerke Bunt KG	Christoph.Haacken@Musterbetrieb.de
Kontaktiert	Christiane	Gerdas	Olven zum Frühstück GBR	Christiane.Gerdas@Musterbetrieb.de

General Security Rules



- Security rules are applicable to all non-administrative users and are set by the vtiger system administrator
- Privileges define what can be done to a data record (read, write, delete)
- Roles define who the Privileges apply to. Roles are defined as a hierarchy, much like a company organization chart
- Modules can have an owner other than the system administrator. This gives the owner special permissions for that module
- Security settings are very flexible but can become very complex

- -
 -
- Trouble Tickets

Provided By



42020 Village Center Plaza

Suite 137

Stone Ridge, VA 20105 USA

1-703-637-9276

www.illuminetic.com