Riymar

RIYMAR CRM WORKFLOW

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The Riymar CRM is an advanced client relation management aspect of the platform which allows users to turn leads i.e. potential customers into loyal ones by conducting various activities with them and doing business. The module functions on the operations of a business in accompaniment based on sales, quotations, invoicing, payment and many more.

The Riymar CRM operations in Riymar is based on the operating principles of a pipeline operation where the data is marked on the various status of the operation it has been presented upon. Each data is marked upon the various status in which a contact or a business opportunity has been present. The status could be made and customized based on the prospects of the user.

- The default operation describes the new ones as leads or new which can have potential business opportunities.
- When an opportunity is available a quotation is sent on the acceptance which is turned into qualified ones after analyzing its potentials and finally a business opportunity is won.
- Where the quotation is changed to sales order and the products invoiced and finally the payment is done.

System users

The Riymar platform allows three types of system users to be configured to manage the operations of the company in Riymar

- Manager: Has access over all the sales and purchase aspects of the company, if there are more than one the allocation can be done based on the department.

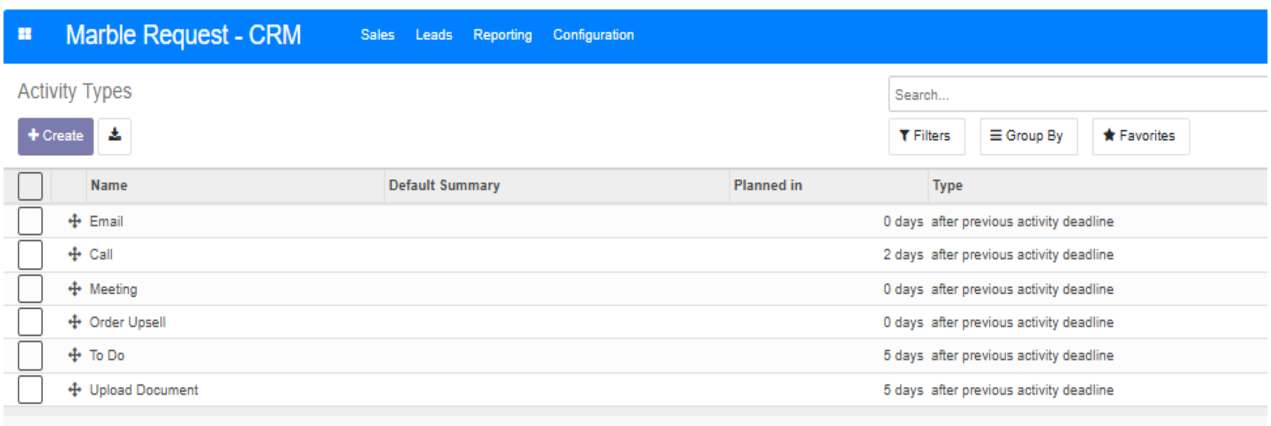
- User-documents only: The type of user of the system who will have control over certain reports and documents but cannot be configured to another sales or purchase documents
- User- all documents: Access to all reports and documents of the company can be coined as the business head, CEO or the owner of the company.

Activities in CRM

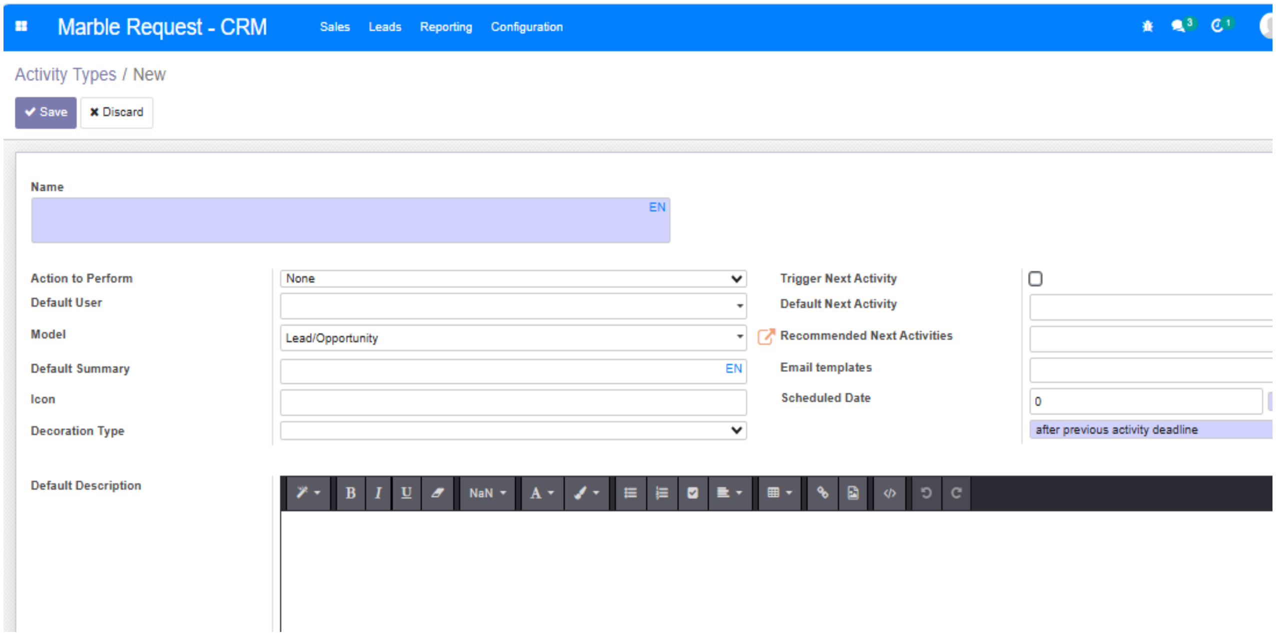
The Riymar platform allows the users to create and schedule various activities with customers in the process of the CRM operations of the platform. The customization process of lead management and operating on them with a communication and information sharing aspects will be beneficial in the company operations.

Activity type

The user can create and configure the various activities of the CRM module in the activity type menu which can be accessed from the configuration dashboard of the CRM module.



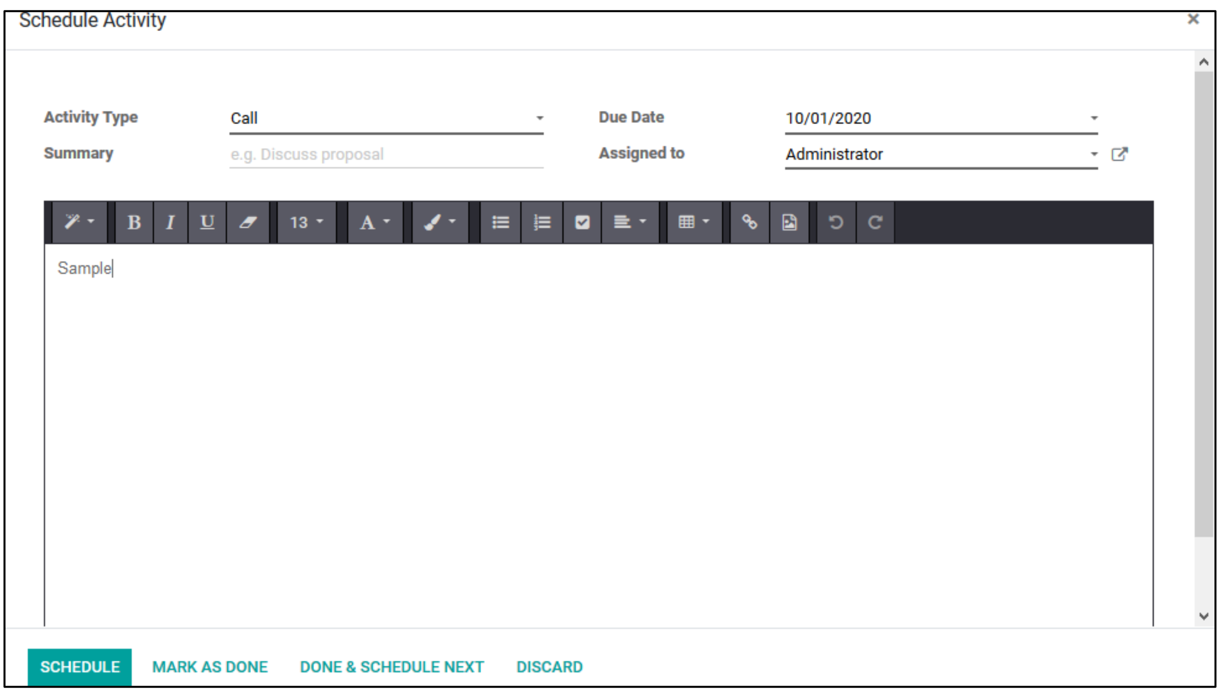
The various activities from the available one can be edited and in need of creating a new one the user can always opt for the create option. A default description along with the various options such as default user, action, next activity trigger as well as schedule duration can be allocated.



Schedule a chain of activities

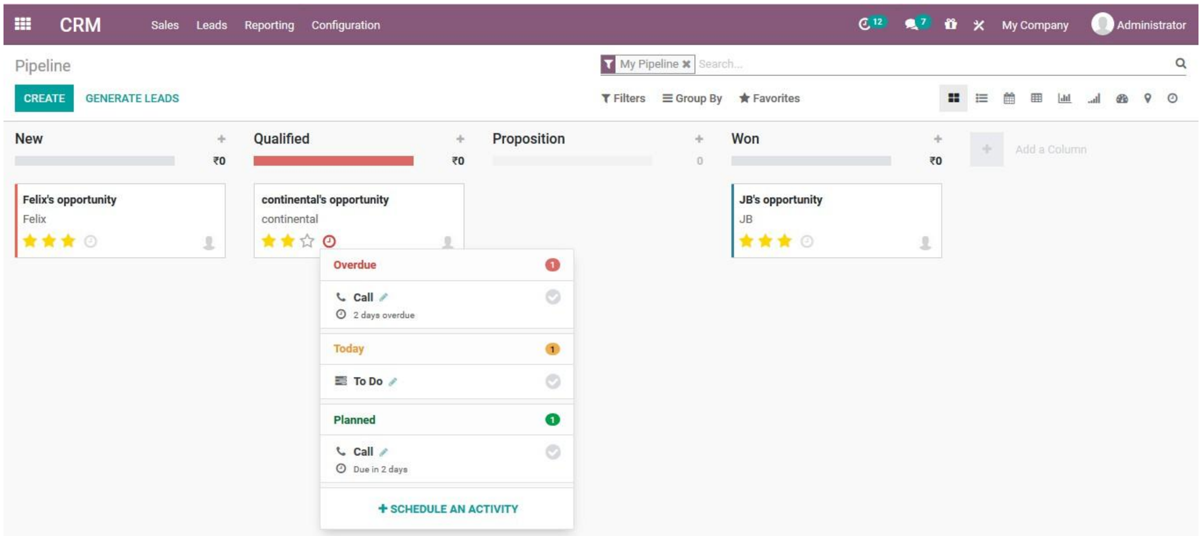
The activity type menu allows the users to add the default nest activity option which can be set to follow on the completion of the main activity, moreover they work on the basis of the description of the activities prioritized.

The activity can schedule an activity directly from the CRM dashboard with respect to each of the opportunities and leads present.

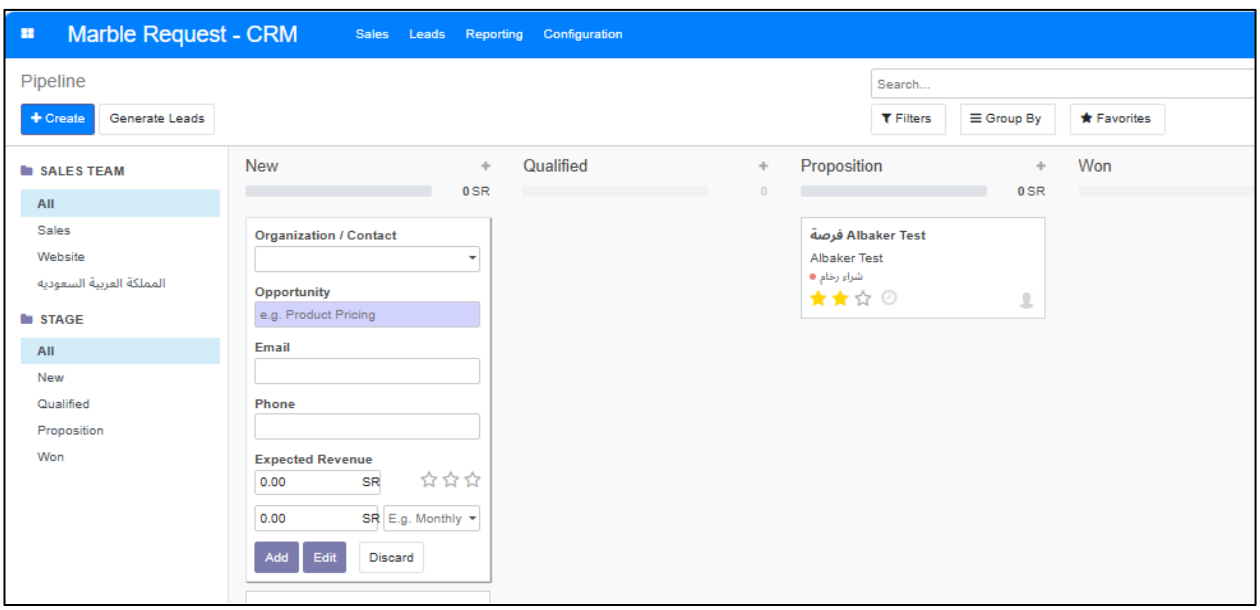


Activity tracking

Additionally, the user can view all the scheduled activity under a lead directly from the CRM dashboard. In addition, this feature of Riymar CRM allows the user to track the scheduled activity.

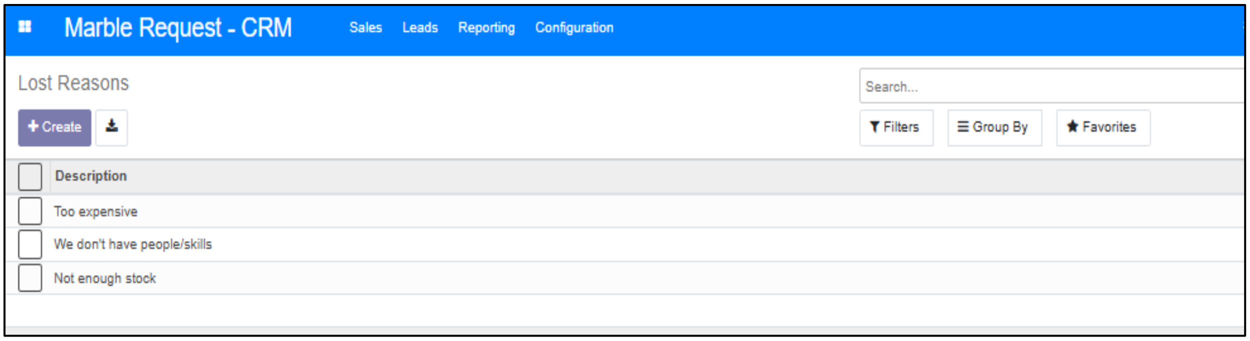


The new leads for the operation can be added in the CRM dashboard which would allow the user to generate themes based on the contact info and the revenue options along with the priority of each available.

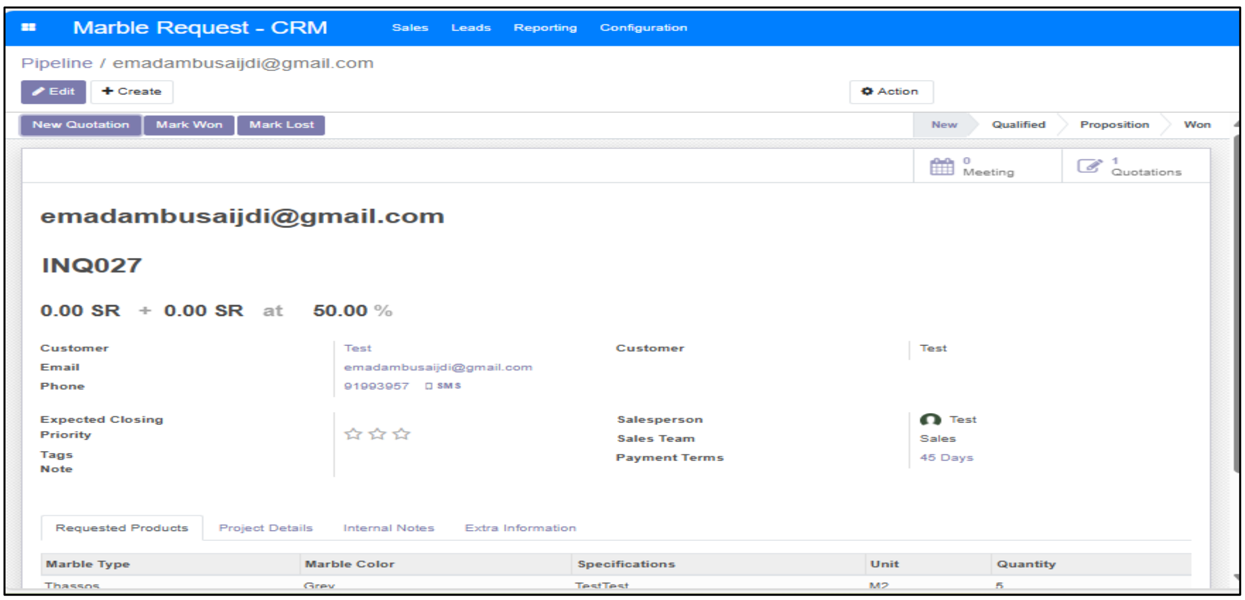


Managing lost opportunities

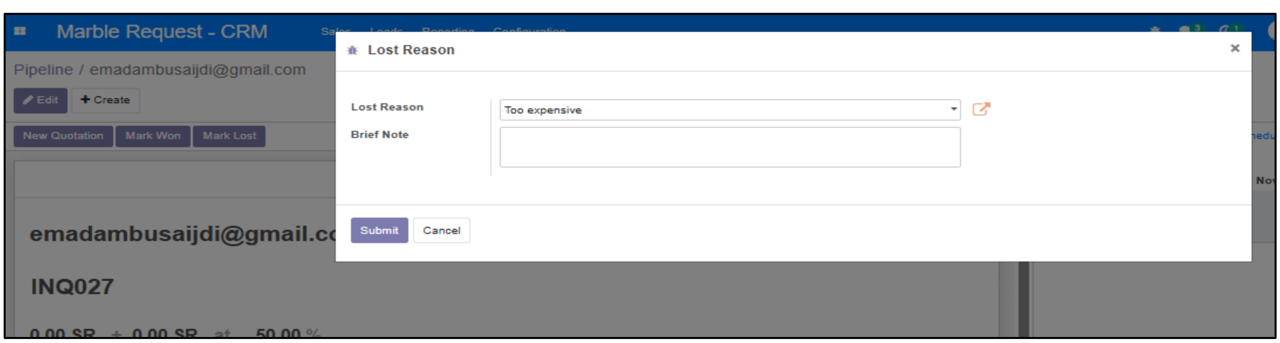
These may be instances in which the Riymar platform has to deal with the lost opportunities of the CRM module. The Riymar CRM has separate provision for this management. The user can allocate various lost reasons for the opportunities under the lost reasons menu available in the configuration tab. The lost reasons can be created as per the user wish and can also be removed from the menu.



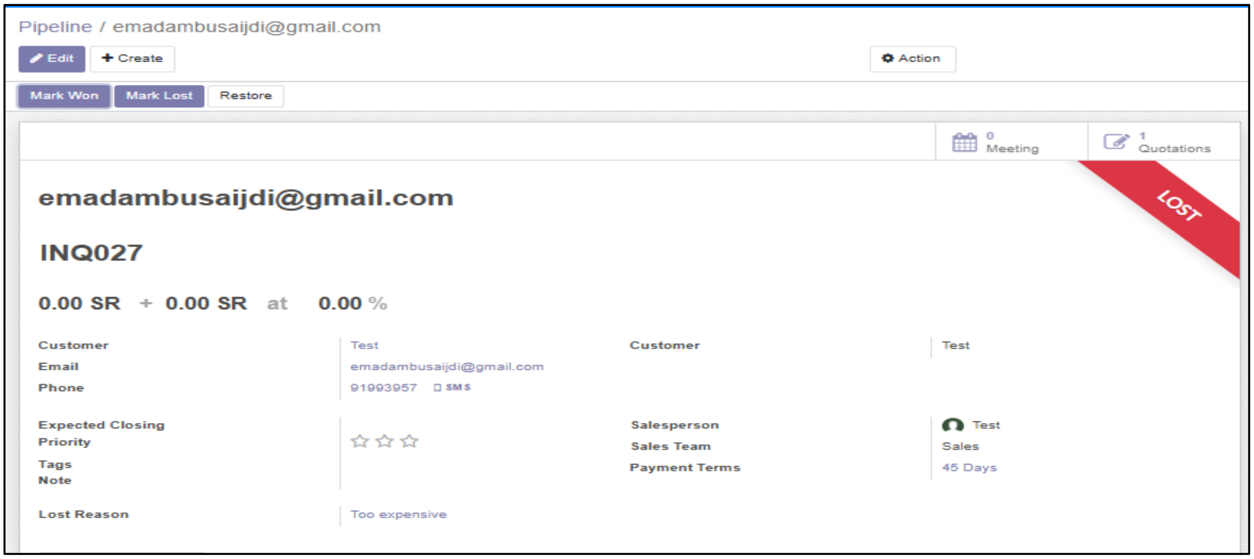
Inside the menu of each lead or opportunity available the user has provision to mark the lead as won, lost or delete it.



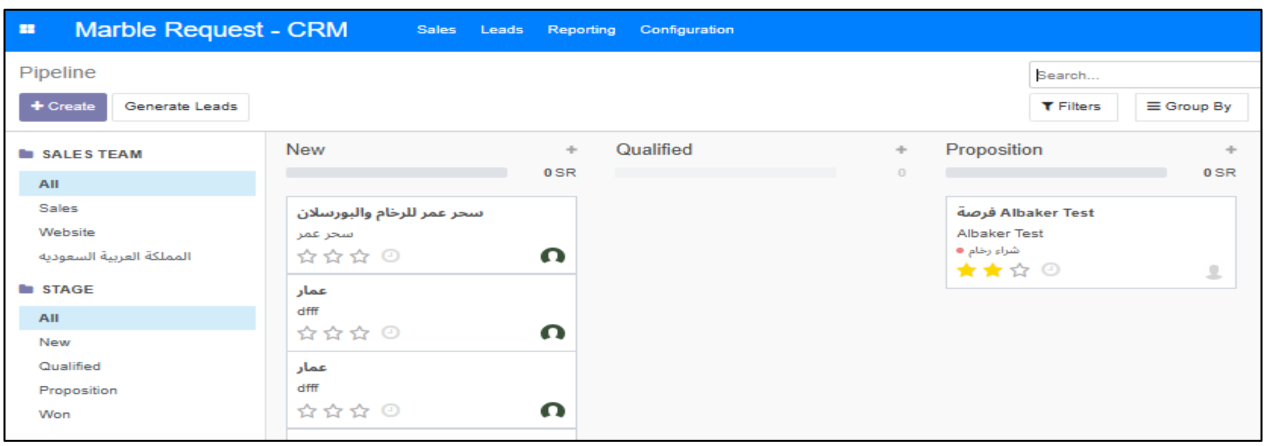
On selecting the activity as a lost one the user will be depicted with a pop up window where the reason for the loss can be selected.



As the reason for the loss of information is being allocated the lead is marked as lost under the opportunity menu. There is also provision for the user to restore the opportunity at any instance if it can be regained.



The lost opportunities in the platform can also be viewed by filtering it in the dashboard. This will allow the user to view all the lost activities. The filtering can be done based on the lost reasons to be more specific.



Lead Acquirement

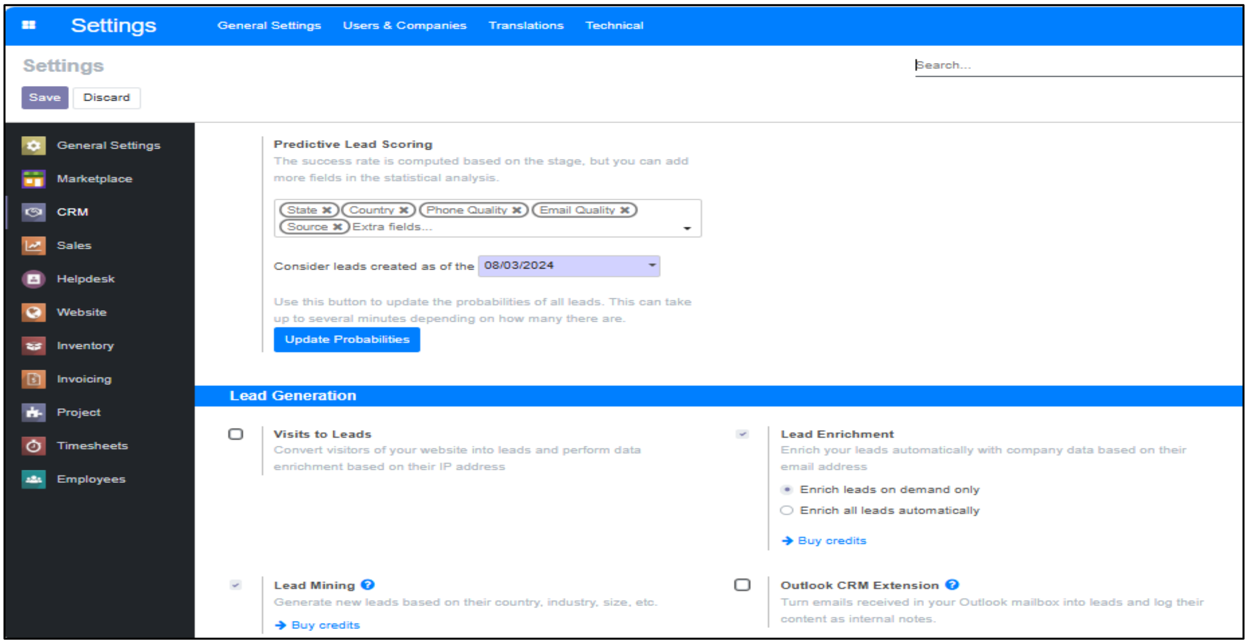
Lead recruitment in the Riymar CRM is an aspect which is simplified to rescue the stress, and work of the managers and the employees of the sales team thus improving their productivity along with the company profits.

Automated lead assignation

The Riymar platform allows the users to enable the automated lead assignation of the various sales representatives of the teams which would simplify the operations for the sales managers and executives. This in turn is done based on the tag allocations done on each lead.

Lead mining

The functionality in Riymar allows the users to search and generate various leads based on the parameters such as country of operation, size of the customer company, technology used by the customer and the products produced.



Lead enrichment

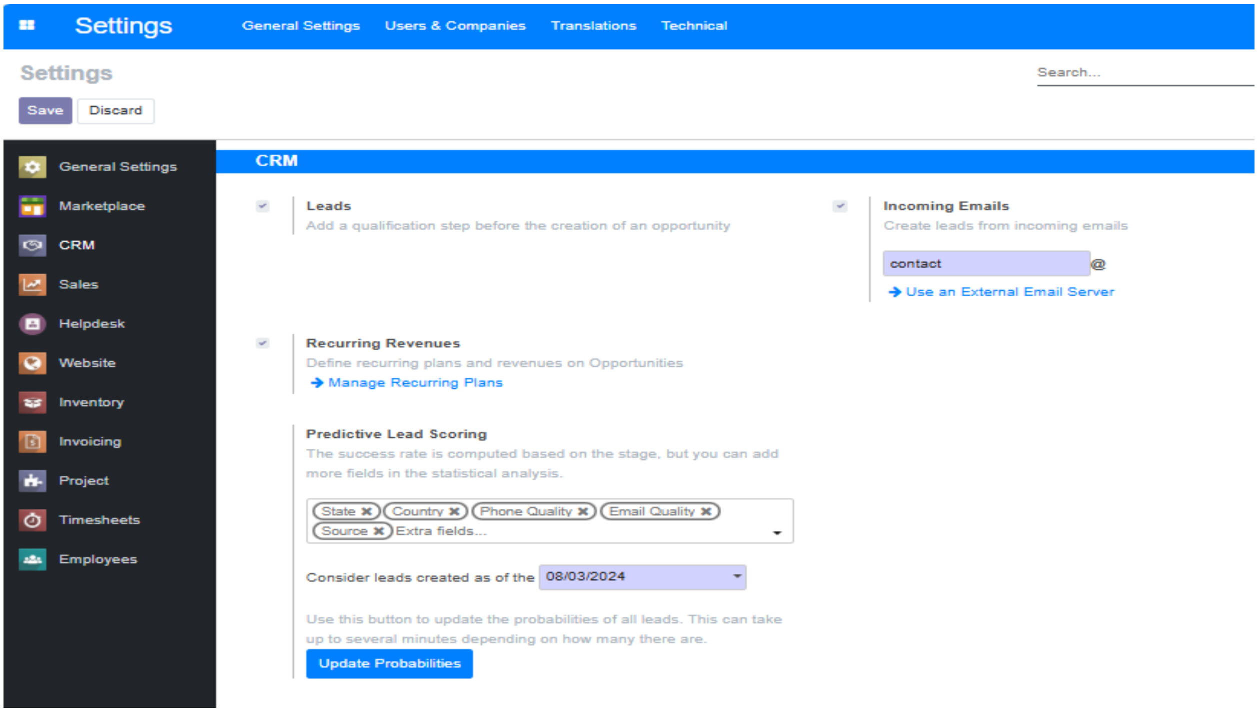
The advanced feature in Riymar CRM which would deliberate the leads for the help of a single contact address. This advanced functionality allows the users to generate contacts of the leads for the email ID available. The search is conducted in the social media platforms and eternal web to attain results.

Outlook CRM extension

The new feature will allow the user to turn the mils received in the users outlook inbox into internal leads for the reference. In addition, these could be turned into opportunities upon acting on them.

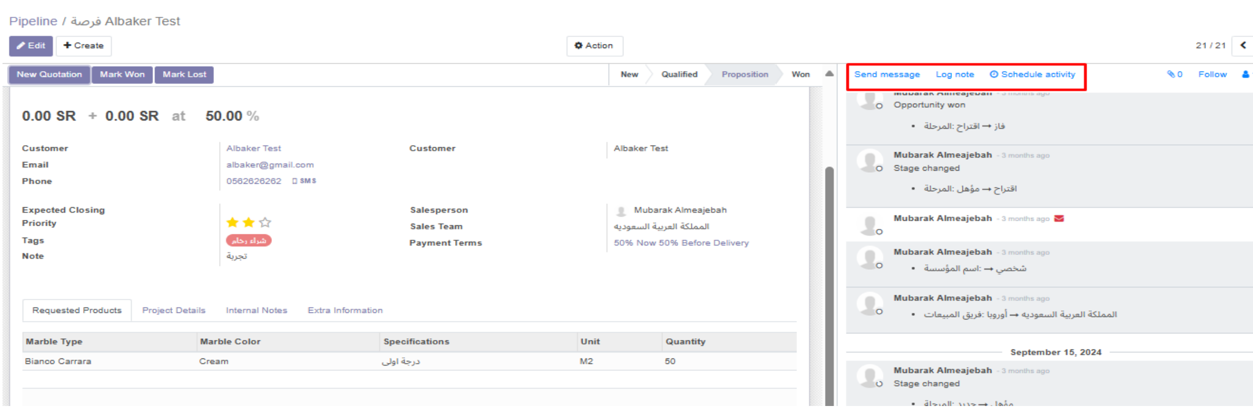
Lead scoring

This feature in Riymar CRM allows the users to determine the analytical data on each opportunity available.



Operations on Leads

The Riymar platform allows the user to operate on the leads available rather than just scheduling activities. These options can be viewed under each lead description and can be done with respect to the need of the users and the company operation.



Send messages

This feature allows the user to send messages to the leads directly from the lead menu.

Log note

The log information on the leads can be describe and the operations which have been conducted can also be described

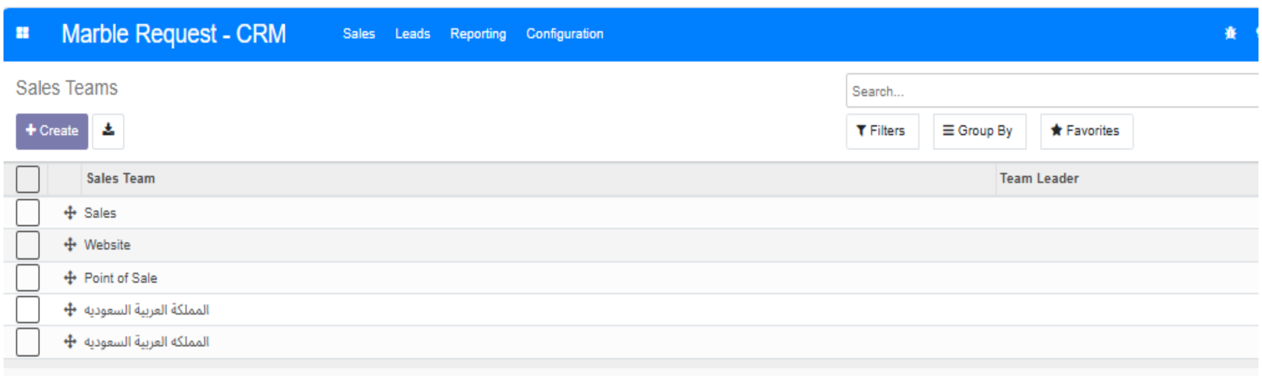
Attachments

The various attachments in form of documents, video file and more can be attached to the respective lead containing the information on the same.

Sales team management

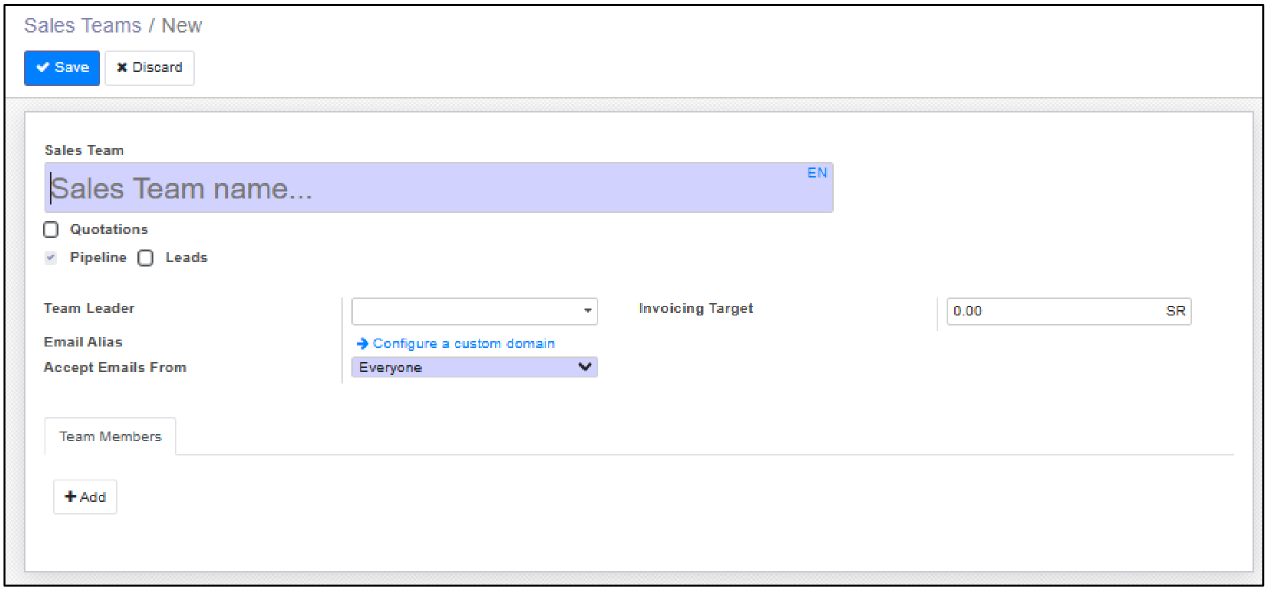
The business operations of the CRM can be controlled based on the sales team in Riymar. The methodology of the sales team will allow the user to have an effective management of the product sale, lead generation and customer relations.

The Riymar sales team menu can be accessed from the configuration as of the CRM module. The teams can be filtered, grouped by and sorted in the instances of a sales team search. The team details can be edited by selecting the respective one



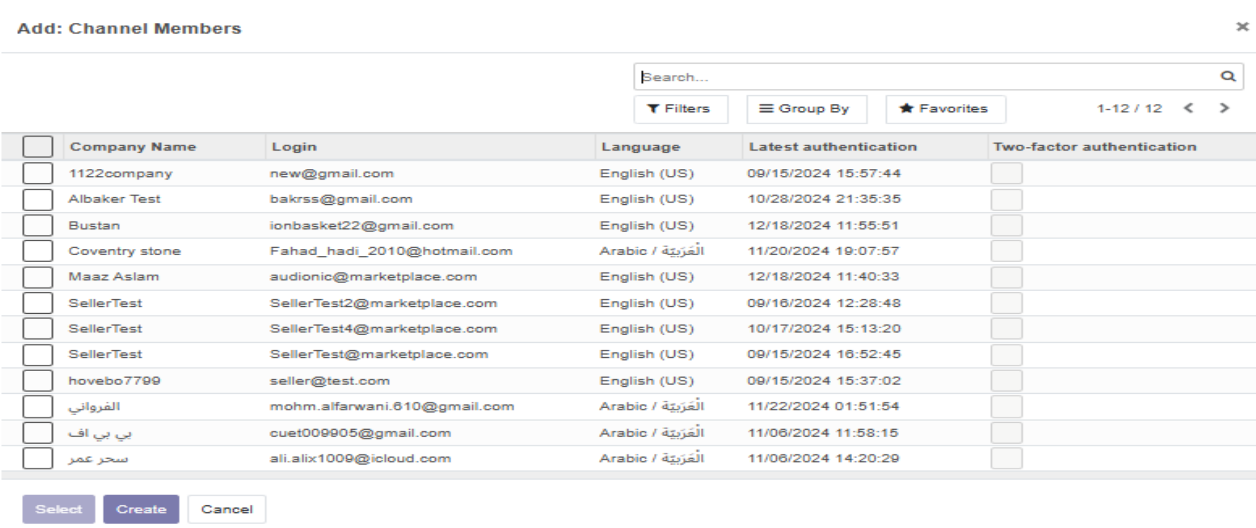
Sales team creation

To create a new sales team, the user can select the create option available. In the creation menu the user can provide a name, allocate it to quotations, pipeline operations and leads. An associated team leader can be selected along with the invoicing target if the company operates based on the sales target terminology.



Adding members to Sales team

The user can add members to the sales team by selecting the add option available under the team member's menu. On which a pop up window containing all the contact information of all the employees will be listed out. The user also has the provision to create a new employee directly from the window.



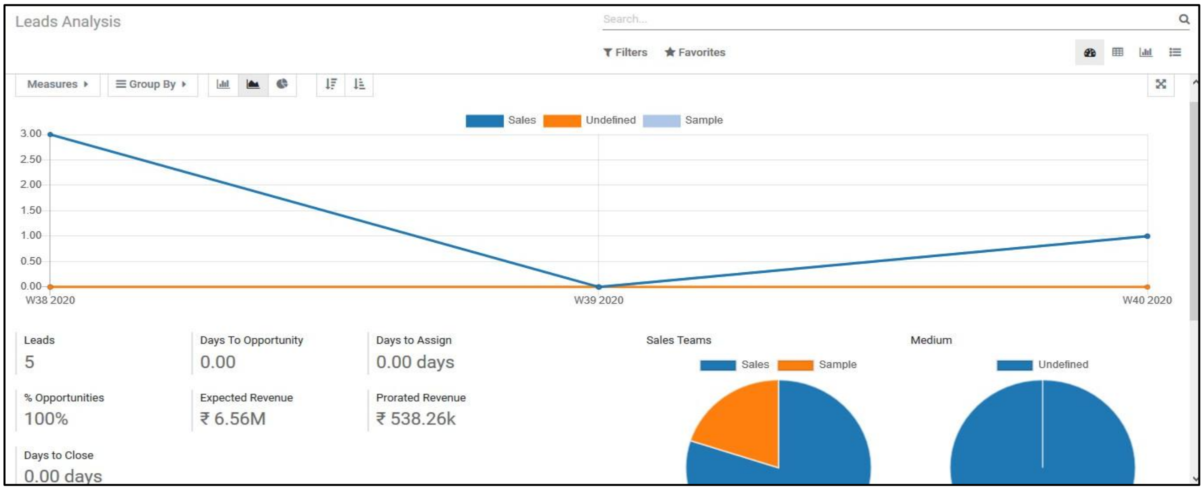
Managing multiple sales teams

The Riymar platform allows its users to manage, monitor and control the operations of various sales teams present. The sales teams can be allocated based on the product, region of operation, quantity of the sale.

Reporting

The report generation feature of the Riymar platform allows the users to generate various analytical reports functions which can be filtered, grouped by and sorted out based on the various parameters available both by default as well as the ones which can be customized.

These reports can be viewed in kanban view, graphical view or list view.

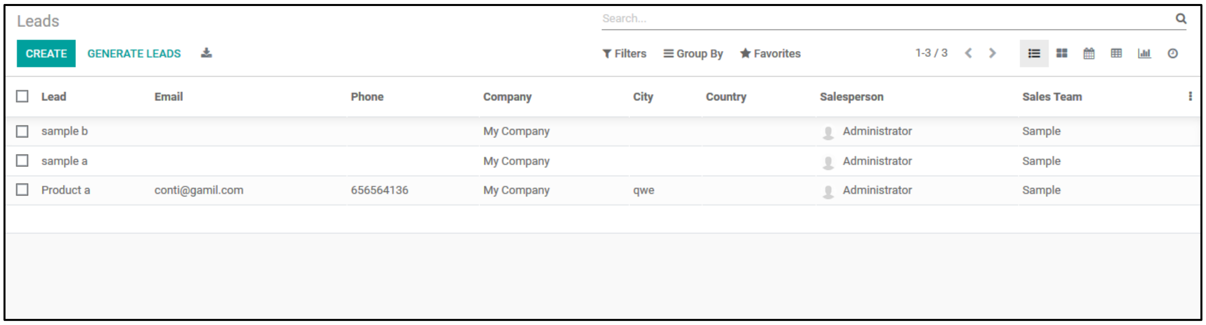


Converting leads into opportunities

The Riymar CRM operation is based on the pipeline terminology which will indicate the users to operate based on the leads and the contact acquired. The leads in the Riymar can be generated into opportunities directly from the lead window. These leads are converted into opportunities under the agreement of the terms and conditions of the business with the customer.

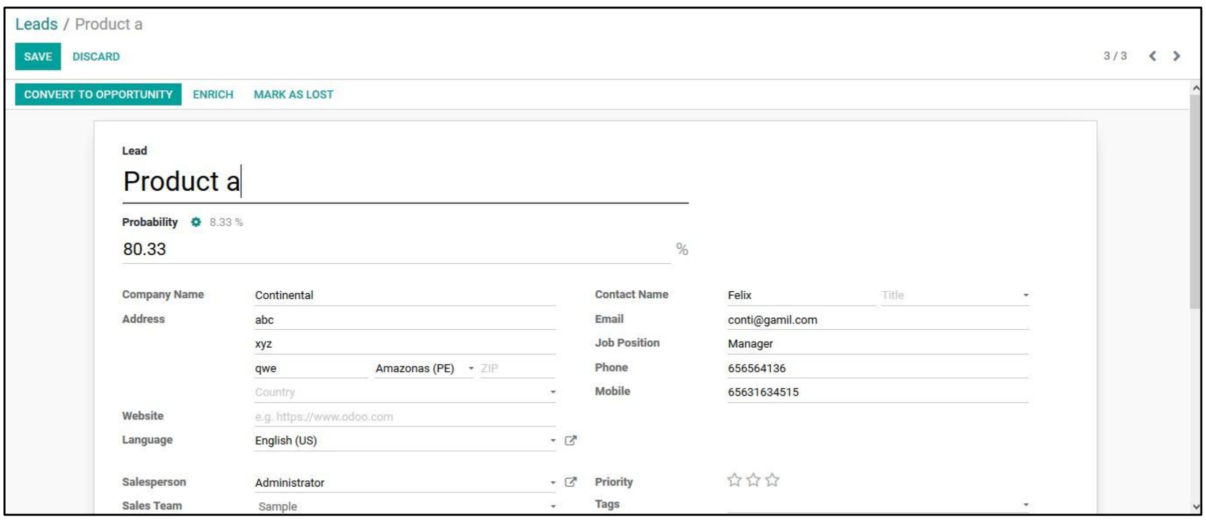
In addition, the above mentioned parameters of operation in Riymar for the lead generation will be beneficial injuring them to an opportunity. Their platform also provides provision for the users to turn the opportunities as lost leads or back as draft leads on the occurrence of a mishap leading to the cancellation of the business opportunity.

The lead menu can be accessed from the CRM dashboard where all the leads allocated with the company will be depicted. The user can edit each one available by selecting the respective lead. All the filtering and sorting options are available as per the ones in other windows of the platform.

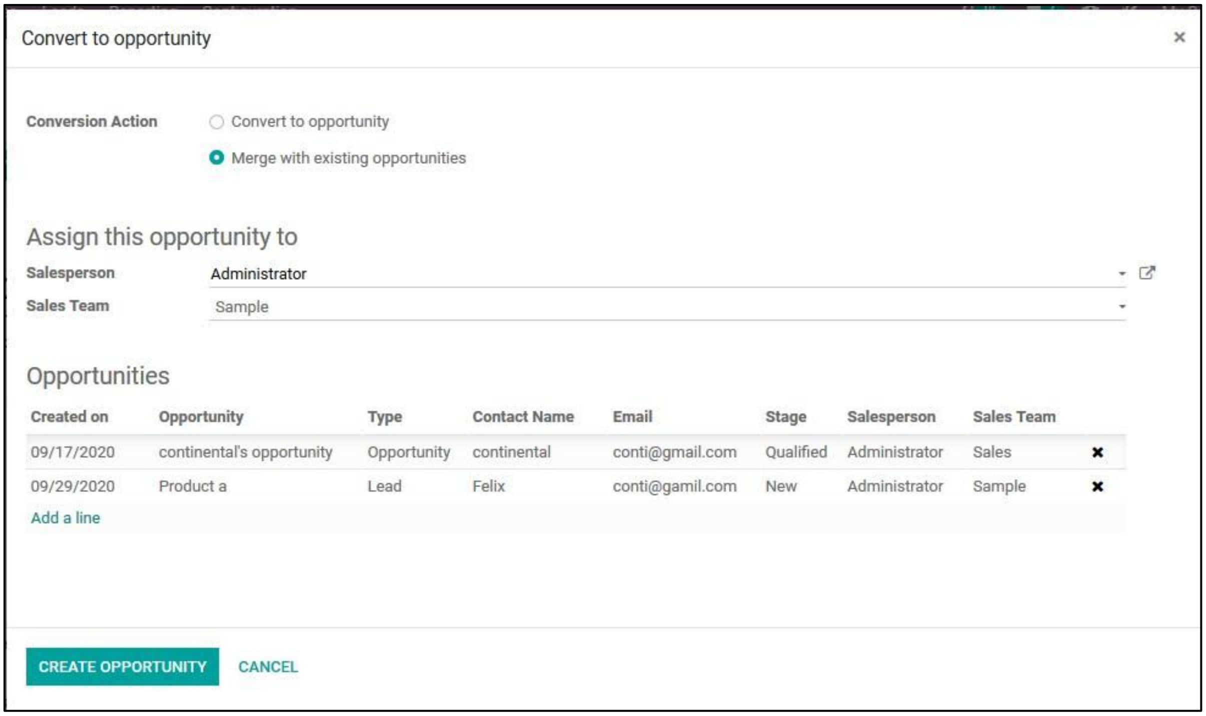


Creating a lead

To create a new lead the user can select the create option available from the lead menu. The description of the lead along with probability of acquiring it can be mentioned. The company or the customer name along with the contact details can be described in the window.



The user can enrich the lead by selecting the enrich option available if there is not much contact information at the user’s disposal. It can also be marked as lost when the lead can no longer be created to an opportunity. But on selecting to convert the lead to an opportunity the user will be displayed by a pop up window on which the opportunity can be described. There are options available for the conversion where the lead can be merged with an existing opportunity or a new creation of opportunity. The salesperson and the sales team can be allocated. On selecting to create a separate opportunity the user will be depicted with options to link the lead to the customer available.


Convert to opportunity
Conversion Action
Convert to opportunity
Merge with existing opportunities
Assign this opportunity to
Salesperson
Administrator
Sales Team
Sample
Opportunities
Created on
Opportunity
Type
Contact Name
Email
Stage
Salesperson
Sales Team
09/17/2020
continental's opportunity
Opportunity
continental
conti@gmail.com
Qualified
Administrator
Sales
09/29/2020
Product a
Lead
Felix
conti@gamil.com
New
Administrator
Sample
Add a line
CREATE OPPORTUNITY
CANCEL