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The "Advanced CRM" module inserts a series of features typical of a CRM program into Dolibarr.

It is based on the concept of **activities**: each third party is associated with the activities of CRM, which identify a specific relationship that our seller has made to the customer.

The activities contain all the information (date, average used, purpose, the requested contact, ...) of the relationship with customers, prospects or suppliers

Through these you get:

- the image of relationships with each individual third party
- the global image of the internal marketing and commercial network

Other characteristics:

- ✓ Activities can be grouped into campaigns, in order to obtain statistical data on the performance of various company campaigns
- ✓ It is possible to generate an event related to the activity on the agenda of the twenty hours
- ✓ It is possible to assign the next action to a seller and insert this action on the personal agenda of the latter
- ✓ It is possible to analyze the results of CRM activities and export the analyzes to Excel or CSV
- ✓ Emails sent to third parties are included in the list of activities of the same.
- ✓ It is possible to connect with the SendinBlue module, thus giving the possibility of:
 - make mass mailings of emai to contacts belonging to a group or with specific characteristics
 - monitor the performance of the emails sent (deliveries, openings, clicks and bounces)

Installation and configuration

The installation of the "Advanced CRMA" module follows the standard Dolibarr methods:

- Download the package.
- From the [Home] menu, click Setup and then select [Modules / Applications] from the menu on the left
- Select the "Deploy/Install external app/modules" item, search for the downloaded package and press [Send]
- Click Setup again.
- Select the [Modules / Applications] item from the menu on the left
- Search for the newly installed module, or use the search tool, and click the On/Off switch. The form is now enabled

Module configuration

After creating the various tables (described below), it is necessary to indicate which are:

- the mode assigned to the activity at the time of sending an email
- the mode assigned to the activity when sending an SMS message
- the default status and object in the two actions mentioned above

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Module tables

In this module there are three tables that are accessible from the *Dictionary* page. These tables are:

Activity modality	Defines the methods (mail, telephone,) or the media through which the third party can be contacted.
Object of the activity	Defines the object or purpose (first contact, proposal,) for which contact with the third party has been activated.
Activity status	Defines the status of the activity

After completing the tables, it is necessary to complete, as described above, the configuration of the module.

A further table is instead present in the menu of the module (it is good practice to compile these tables before starting to work with the module):

Campaign The campaign acts as a hat for the various types of information present in the module (Activities, Mail, SMS, ...)

In the analysis of the results it provides a filter to group or sort the data.

CampaignThe campaign acts as a hat for the various types of information present in the
module (Activities, Mail, SMS, ...).In the analysis of the results it provides a filter to group or sort the data.

Operations on third parties

When installing the module, two new tabs are shown on the pages of third parties. These tabulations are:

🗊 Soggetto terzo	Scheda	Contatti/Indirizzi 🔞	Cliente	Progetti 🕤	Elementi correlati	Conti bancari	Tickets Mail Inviate		
Lista Attività 🚽	hemoria	a Rewards Mar	gini Note	Documenti 🕢	Eventi/Agenda				
clie	ente genei	ico					Torna alla list	a <	>

Activity list Contains the list of activities performed on the third part.

Mail sentContains the list of all the e-mails that have been sent to the particular third party.
As detailed below for each email it will be possible to analyze specific data on the use made
by the third party. The tabulation is present only if the Sendinblue module has also been
installed

The image below details the information associated with individual activities.

	Cliente generico ♥ Via Alberto Fulco, 6, 10010 Scarmagno, Italy - TORINO ♥ 0125739141 ♥ marcello.gribaudo@gmail.com	Back to the activity list Open
Ref.	1	
Date		
Campaign	Winter campaign 2018	
Priority	1	
Туре	Out	
Mode	By Telephome	
Status	Active	
Object	First contact	
Contact		
AssignedTo	LAIOPP Demo	
Duration	23:20	
Note	Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium dolorem explicabo. Nemo enim ipsam	ue laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt
Next action assigne to	ed 🔒 Sara Corrias	C ₂
Next action date	06/21/2019 03:49 PM	
Next action nite	Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula e quam felis, ultricies nec,	et dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Donec

Notice how each activity can be accompanied by documents.

	Organizzazione Progetti Gestionali
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Statistics

	cliente generico ♥ Via Alberto Fulco, 6, 10010 Scarmagno, Italy - TORINO ♥ 0125739141 ☞ marcello.gribaudo@gmail.com	Back to the activity list
Ref.	1	
Date		
Campaign	Winter campaign 2018	
Priority	1	
Туре	Out	
Mode	By Telephome	
Status	Active	
Object	First contact	
Contact		
AssignedTo	LAIOPP Demo	
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		Modify Delete Event creation Next Event creation

The statistics page allows you to select the desired actions, analyze them and finally export them to a spreadsheet.

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ling	U 8	24/03/2019	() cliente generico (Pseudonimo)	Social media campaign	8	Out	Altro	Programmato	Contenzioso	Roberto Baggio	2 Uno Dipendente	09.00	
wo Mailing	C 18	18/03/2019	Ell cliente generico (Pseudonimo)	Social media campaign	0		Altro	Cancellato	Contenzioso			00.00	
s	Q 2	18/03/2019	(i) cliente generico (Pseudonimo)	Fall Winter 2018-19 Ad Campaign	2	In	Di Persona	Completato	Richiamo	Paolo Rossi	2 Admin	00.00	
WO SMS	Q 1	13/03/2019	Ell cliente generico (Pseudonimo)	Social media campaign	121	in	Telefono	Completato	Richiamo	Roberto Baggio	2 Due Dipendente	01:45	
іррі	S 17	01/03/2019	Ell cliente generico (Pseudonimo)		0	Out	Altro	Cancellato	Contenzioso			00:00	
wo gruppo	G 3		Ell cliente generico (Pseudonimo)	Social media campaign	3	in	Fax	Cancellato	Proposta		2 Admin		
npagne	1 27		Ell cliente generico (Pseudonimo)	Fall Winter 2018-19 Ad Campaign	7	Out	Fax	Completato	Proposta	ESPORTAZIONI	L Admin		
Dollbarr 8.0.4	Q 4		El cliente generico (Pseudonimo)	Winter campaign 2018	4	Out	Altro	Opzionale	Contenzioso	N	2 Admin		
	Q 5		Ell cliente generico (Pseudonimo)	Winter campaign 2018	5	Out	Telefono	Opzionale	Primo Contatto		2 Admin		
	Q 6		cliente generico (Pseudonimo)	Social media campaign	6	In	Di Persona	Cancellato	Richiamo		🔔 🧕 Admin		