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

## 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.

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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:



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

**Mail sent** Contains 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.



Notice how each activity can be accompanied by documents.

# Statistics

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Back to the activity list

Open 🟢

| Ref. | 1 |
| --- | --- |
| Date | |
| Campaign | Winter campaign 2018 |
| Priority | 1 |
| Type | Out |
| Mode | By Telephome |
| Status | Active |
| Object | First contact |
| Contact | |
| AssignedTo | 👤 AIOPP Demo |
| Duration | 23:20 |
| Note | Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam |
| Next action assigned to | 👤 Sara Corrias |
| Next action date | 06/21/2019 03:49 PM |
| Next action nite | Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Donec quam felis, ultricies nec, |

[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.