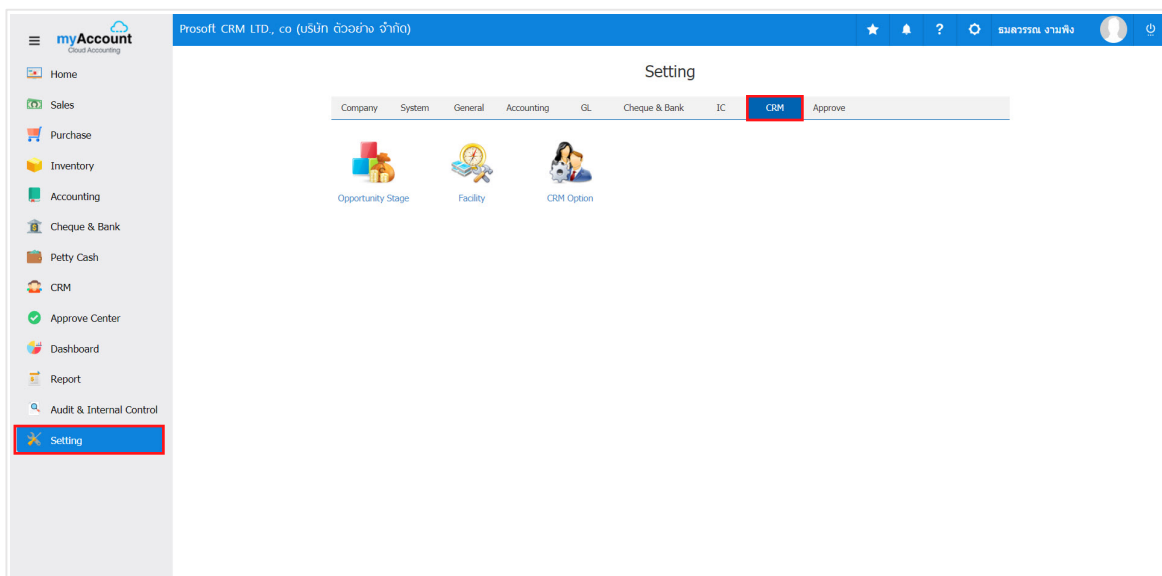


Setting customer relationship (CRM Setup)

There is used to configure the default client relationship. To prepare the work program to determine the details should be given respectively to the scheduled continuation of the work will be recorded starting in the major part of it is to make the system work more perfectly.

Users can set up additional information by pressing the "Setting" > "CRM" system to screen for setting the CRM data shown.



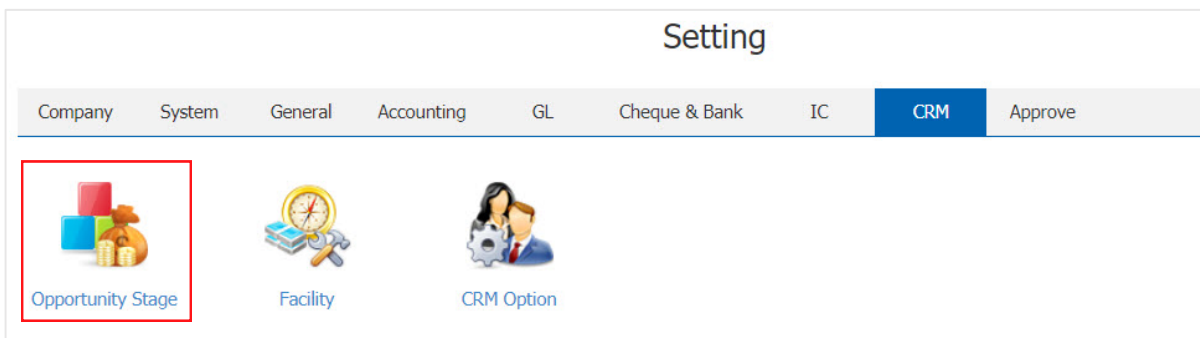
In the Customer Relationship There are 3 menu as follows:

- Data Settings menu opportunity status.
- Menus settings and data.
- Data CRM Option menu settings.

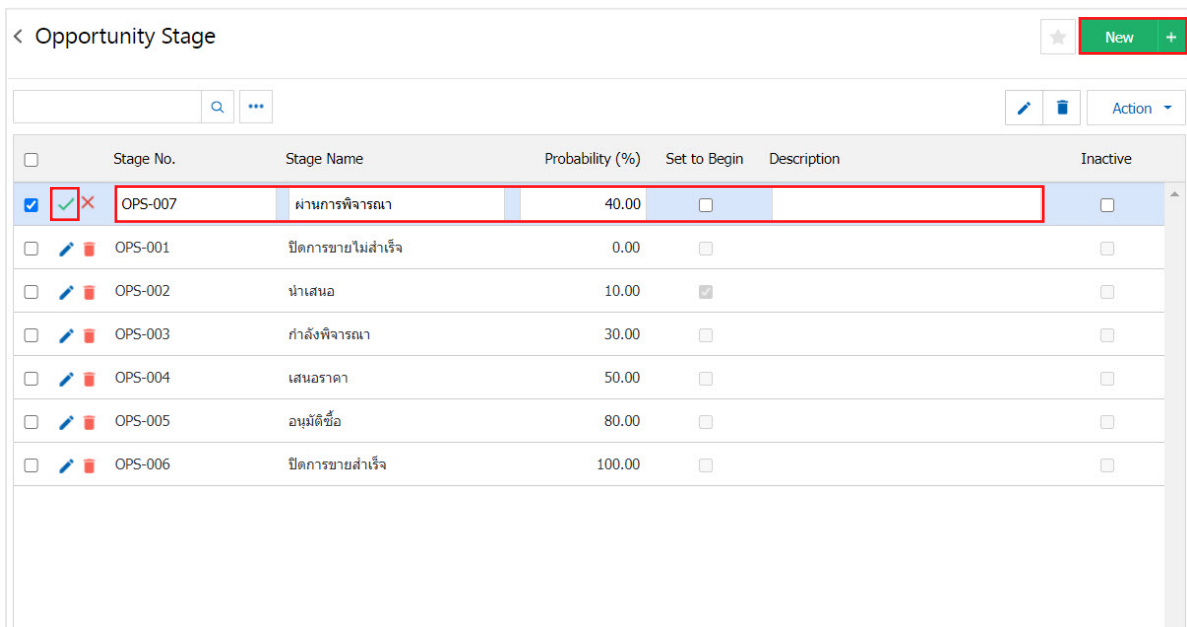
Menu settings, status information leads

Means to determine the status of sales opportunities. In order to analyze the situation arises that could seal the success or failure.

1. Users can add state sales opportunities by pressing the "Opportunity Status" to see the list. Opportunity Status The system captured data from the Figure.



2. The system will display the status of sales opportunities. Users can create more sales opportunities status by pressing the "New" > "Fill a status code. Name Status chance possible (%) and the description" > "Set to Begin default data" > "✓" to save the image.

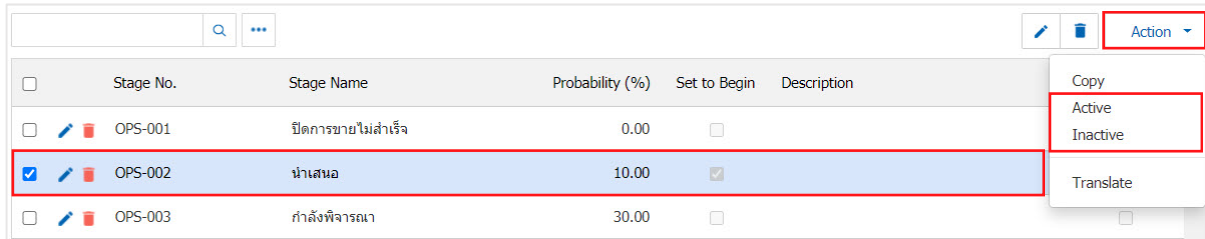


<input type="checkbox"/>	Stage No.	Stage Name	Probability (%)	Set to Begin	Description	Inactive
<input checked="" type="checkbox"/>	OPS-007	ผ่านการพิจารณา	40.00	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	OPS-001	ปิดการขายไม่สำเร็จ	0.00	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	OPS-002	นำเสนอ	10.00	<input checked="" type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	OPS-003	กำลังพิจารณา	30.00	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	OPS-004	เสนอราคา	50.00	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	OPS-005	อนุมัติซื้อ	80.00	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	OPS-006	ปิดการขายสำเร็จ	100.00	<input type="checkbox"/>		<input type="checkbox"/>

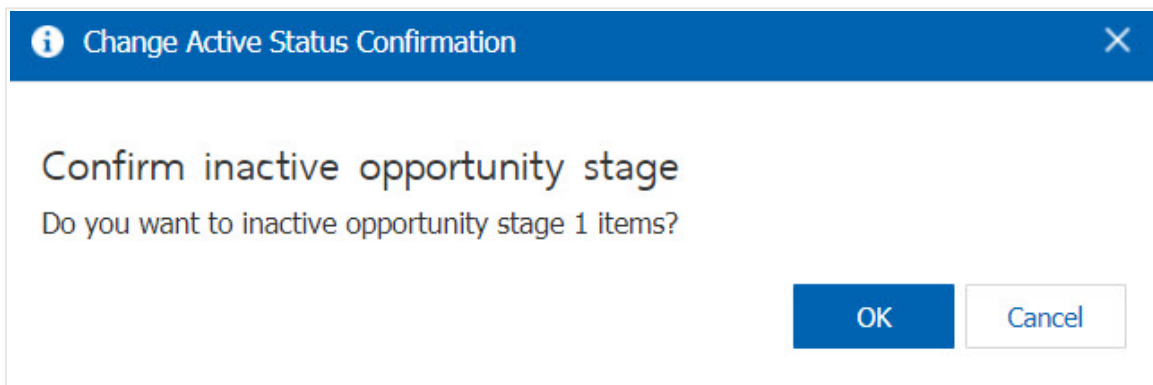
* Note: If users want to edit this data leads by pressing the "✎" button to make corrections.

* Note: If the user wants to delete this data leads by pressing the "🗑️" button to delete the data.

3. User can Enable / disable the status of opportunities to stay active or canceled. Using this data leads it by pressing the "Select state sales opportunities to open / close" > "Action" > "Active is enabled, status information, sales opportunities" or "Inactive is closed use Job Opportunity Information Status" will show Pop - up to the user to confirm the enable / disable information. Opportunity Status Figure.



<input type="checkbox"/>	Stage No.	Stage Name	Probability (%)	Set to Begin	Description
<input type="checkbox"/>	OPS-001	ปิดการขายไม่สำเร็จ	0.00	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	OPS-002	นำเสนอ	10.00	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	OPS-003	กำลังพิจารณา	30.00	<input type="checkbox"/>	

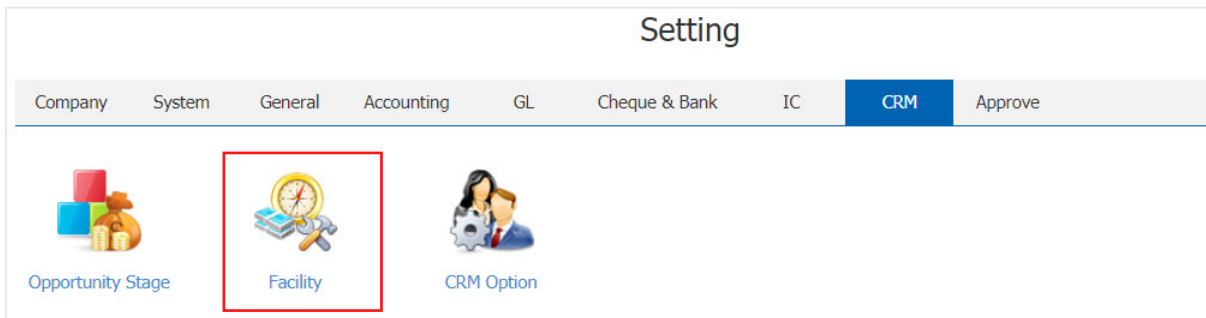


* Note: If the department has activated state sales opportunities already. Users will not be able to open. Using this data leads to duplicate.

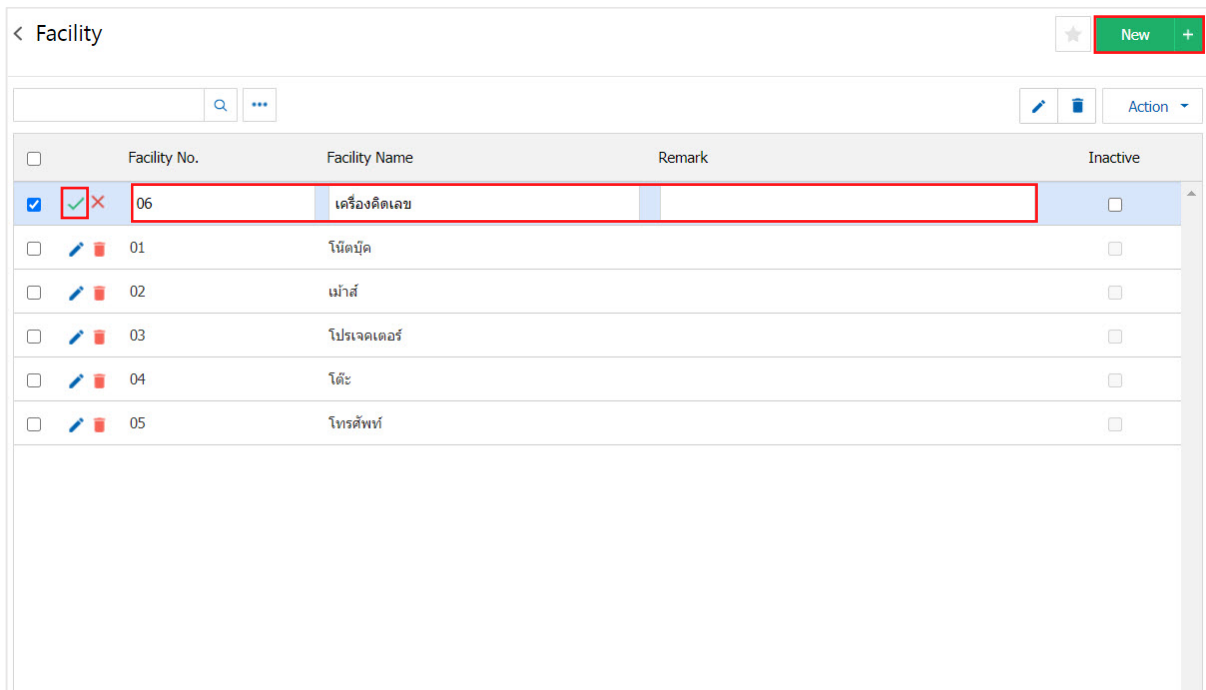
Menu settings device

Refers to the devices that employees use to meet clients. To help facilitate the. Provide information to customers.

1. The user can add a device by pressing the "Facility" to create a data entry device as shown in Figure.

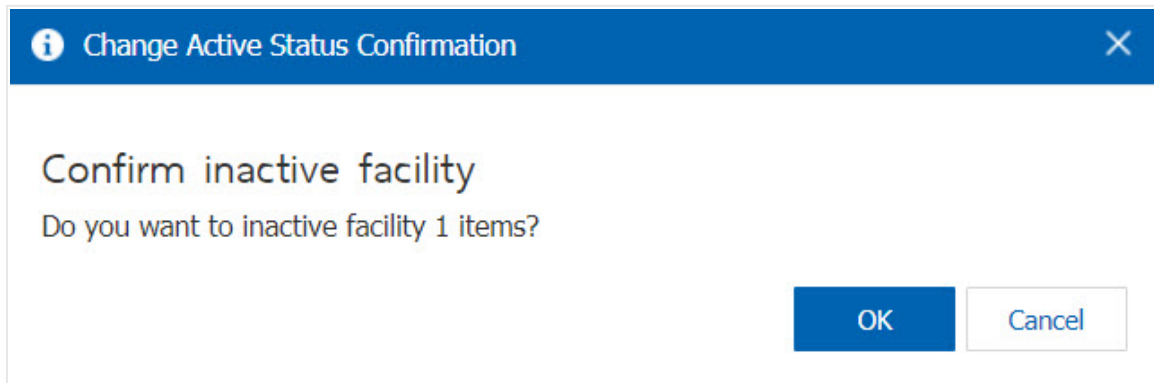


2. The system will display a list of devices. Users can create a device by pressing the "New" > "Fill the device, the device name and note" > "✓" to save the image.



- * Note: If users want to edit the device by pressing the "✎" button to do so corrections.
- * Note: If the user wants to erase by pressing the "🗑" button to delete the data.

3. User can enable / disable the device to stay active or deactivate the device by pressing "Select the devices to be turned on / off" > "Action" > "Active is enable device" or "Inactive to disable the device" will show Pop - up to the user to confirm the enable / disable device shown.

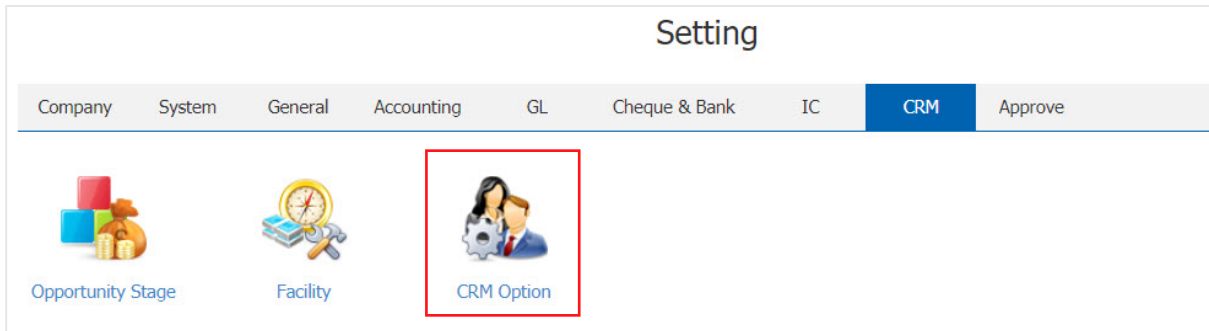


* Note: If the department has. Enable device already. Users will not be able to use the device over.

Menu settings information CRM Option

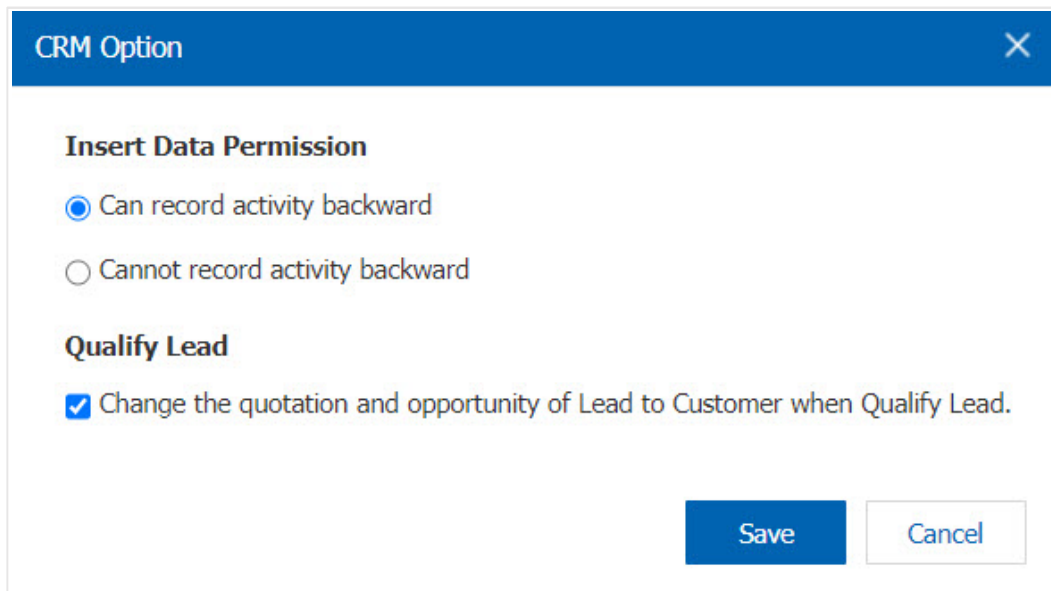
Refers to the Option that is used to record daily information on the CRM

1. The user can edit the CRM Option menu by pressing the "CRM Option" as shown in Figure.



2. The system will display a list of information CRM Option, users can edit the license key information, as detailed below.

- Historical data is also key. Users can save CRM data back.
- Key information can not reverse that. Users can not save CRM data retroactively.



The screenshot shows a dialog box titled 'CRM Option' with a close button (X) in the top right corner. The dialog contains two sections: 'Insert Data Permission' and 'Qualify Lead'. Under 'Insert Data Permission', there are two radio buttons: 'Can record activity backward' (which is selected) and 'Cannot record activity backward'. Under 'Qualify Lead', there is a checked checkbox for 'Change the quotation and opportunity of Lead to Customer when Qualify Lead.' At the bottom right of the dialog, there are two buttons: 'Save' and 'Cancel'.