

معرفی

مخاطب

CRM

حراجی

POS

نمایشگر آشپزخانه

اشتراک ها

اجاره ای

حسابداری

تحکیم

مخارج

مدیریت صفحه گسترده

اسناد

امضا کردن

فهرست

تولید

مدیریت طبقه فروشگاه

# CRM - کتاب سازمانی - Odoo 17

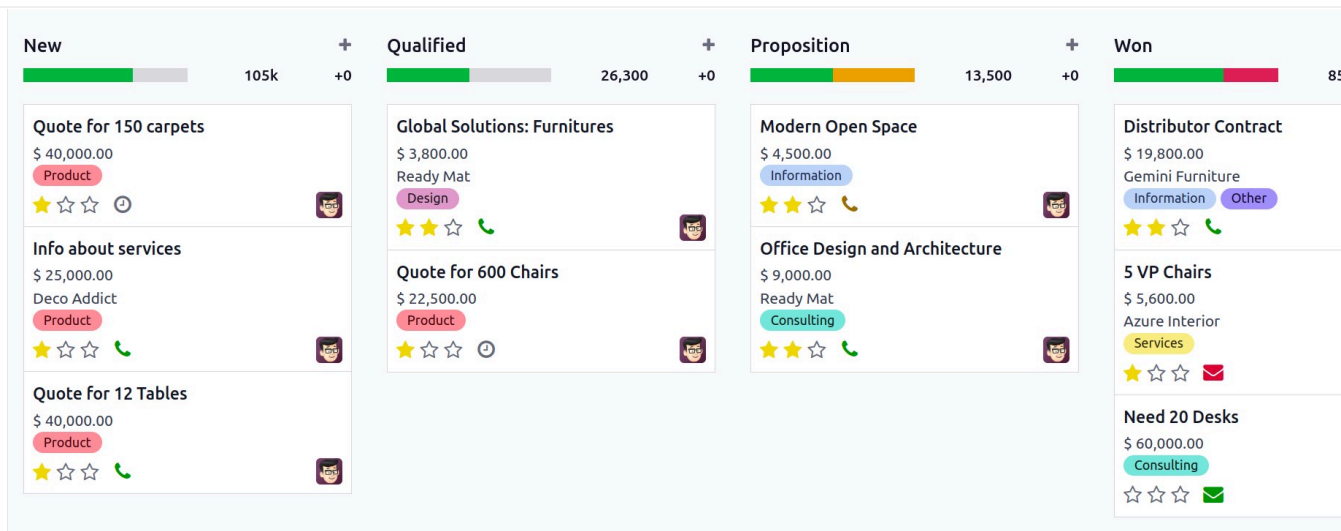
## CRM خط لوله سرنخ ها/فرصت های

پنجره ای است که هنگام دسترسی به آن ظاهر می شود. فعالیت های خط لوله را می توان به CRM داشبورد اصلی ماژول سرنخ ها و فرصت ها بر اساس میزان فاصله آنها در خط لوله فروش، Odoo 17 صورت مرحله ای در نظر گرفت. در جمع آوری سرنخ ها از منابع مختلف، از جمله وب سایت شرکت، حساب Odoo سازماندهی می شوند. طراحی بسیار یکپارچه Odoo17 های رسانه های اجتماعی، چت زنده، ایمیل، پیامک و بسیاری از کانال های دیگر را ممکن می سازد. با استفاده از سرنخ ها از همه این کانال ها ممکن است به طور موثر مدیریت شوند. بسته به واکنش های مشتری، این سرنخ ها می CRM، توانند بعداً به فرصت ها و در نهایت به قیمت های فروش تبدیل شوند. توانایی یک کسب و کار برای افزایش فرصت های CRM است. فروش به طور قابل توجهی تحت تاثیر ماژول

وجود CRM سه منوی اصلی شامل **فروش، سرنخ ها، گزارش و پیکربندی** همانطور که در تصویر مشاهده می شود، در ماژول می توانید گزینه های مختلفی را برای انجام وظایف مختلف مرتبط با مدیریت ارتباط با مشتری در زیر هر Odoo 17 دارد. در یک از این منوها پیدا کنید

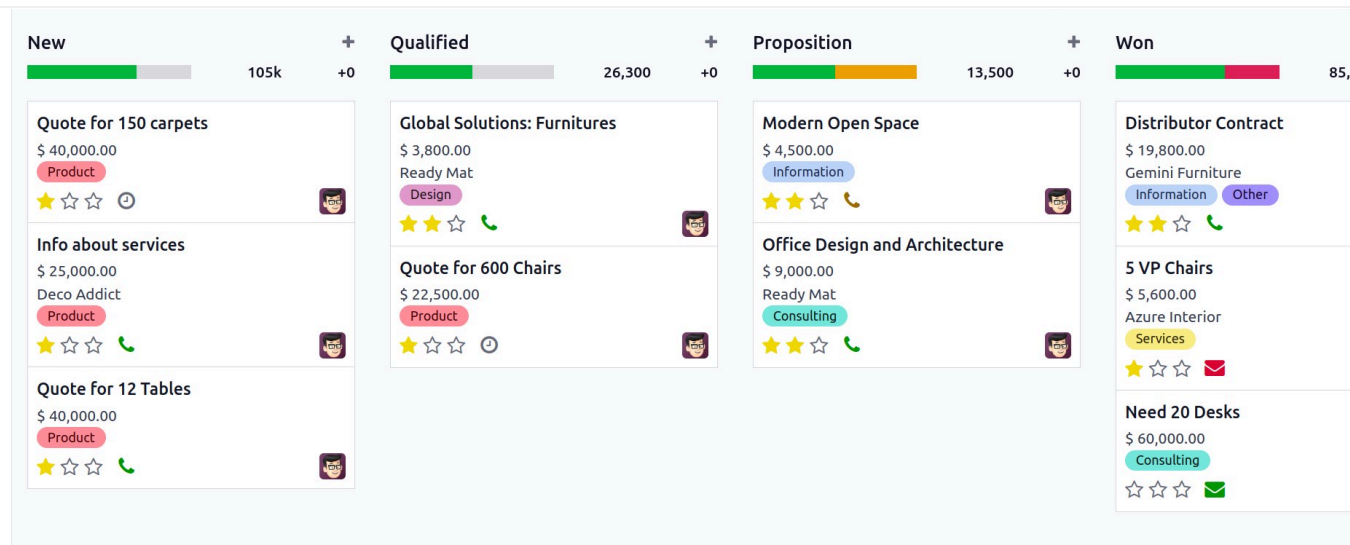
نشان می دهد. این پلتفرم را می توانید در منوی فروش ماژول در **Odoo 17** را برای CRM اسکرین شات داشبورد اصلی ماژول فهرستی از تمام سرنخ هایی که از طریق مسیرهای مختلف تولید **My Pipeline** پیدا کنید. صفحه **My Pipeline** زیر گزینه شده اند را نمایش می دهد.





کل ظاهر صفحه Odoo 17، را نشان می دهد. در CRM Odoo 17 تصویر بالا رابط رنگی بازطراحی شده داشبورد ماژول **Activity** و **Map** نمایش تغییر کرده است. می توانید صفحه نمایش پلتفرم را به Odoo تغییر دهید ، مانند نسخه های قبلی





We can see that all records are grouped in the window according to their progress in operations when we look at the Kanban view of the CRM pipeline. Leads are arranged so the user can quickly see how each lead progresses. It's simple to assign multiple stages to leads in the CRM module. You can alter the stages and group leads into the appropriate stages based on your business needs.

The **New**, **Qualified**, **Proposition**, and **Won** stages are included in the screenshot. All fresh leads will show up under the fresh stage, as indicated by the stage names. Only qualified leads from the new leads will move on to the Qualified stage, which is the following stage. Once the matching customer has confirmed it, the profitable business leads can be advanced to the stage 'Won'.

Similarly, by utilizing the **+Stage** button, you can quickly generate the necessary stages for the leads. A new field will open when you click on this button, as seen in the image, where you may enter the name of the new stage.



The screenshot displays a CRM interface with a lead pipeline. At the top, there are three columns: 'Proposition' with a value of 26,300 and a change of +0; 'Won' with a value of 13,500 and a change of +0; and a highlighted '+ Stage' button. Below these columns, there are three lead cards. The first card is titled 'Modern Open Space' with a value of \$ 4,500.00, an 'Information' tag, and a rating of 3 stars. The second card is titled 'Office Design and Architecture' with a value of \$ 9,000.00, a 'Ready Mat' tag, a 'Consulting' tag, and a rating of 3 stars. The third card is titled 'Distributor Contract' with a value of \$ 19,800.00, a 'Gemini Furniture' tag, an 'Information' tag, an 'Other' tag, and a rating of 3 stars. Below this, there are two more cards: '5 VP Chairs' with a value of \$ 5,600.00, an 'Azure Interior' tag, a 'Services' tag, and a rating of 3 stars; and 'Need 20 Desks' with a value of \$ 60,000.00, a 'Consulting' tag, and a rating of 3 stars. Each card includes a 'Lead' icon and a 'Call' icon.

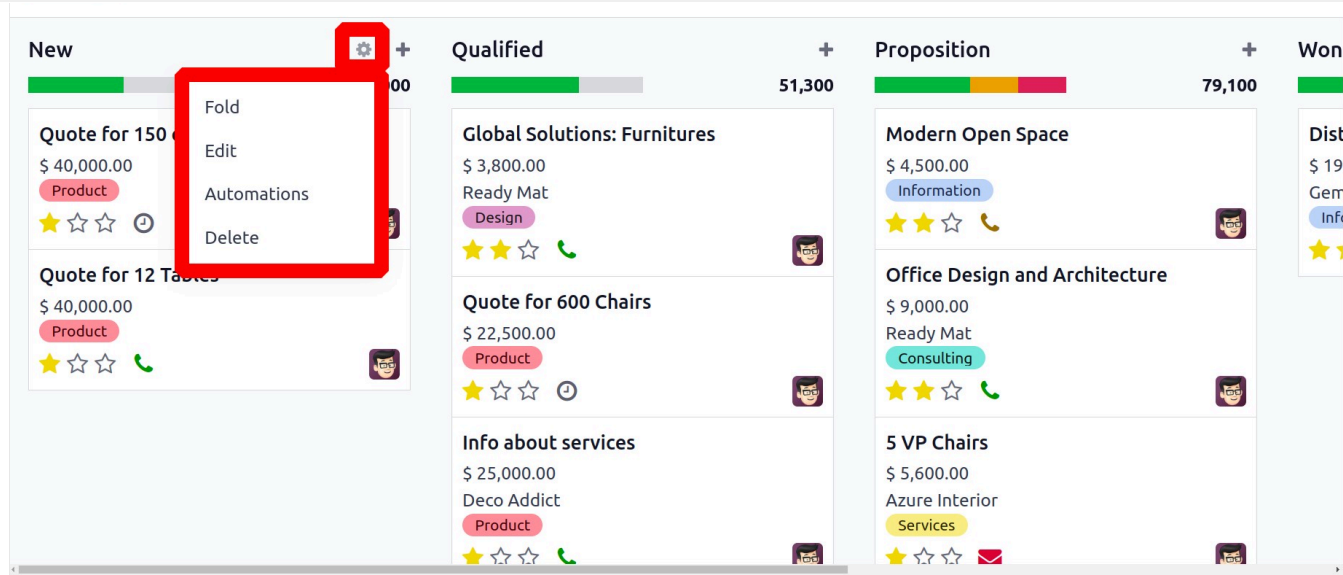
Enter the title in the provided field, then press the **Add** button. By using this technique, you can add as many new levels for leads as you like.



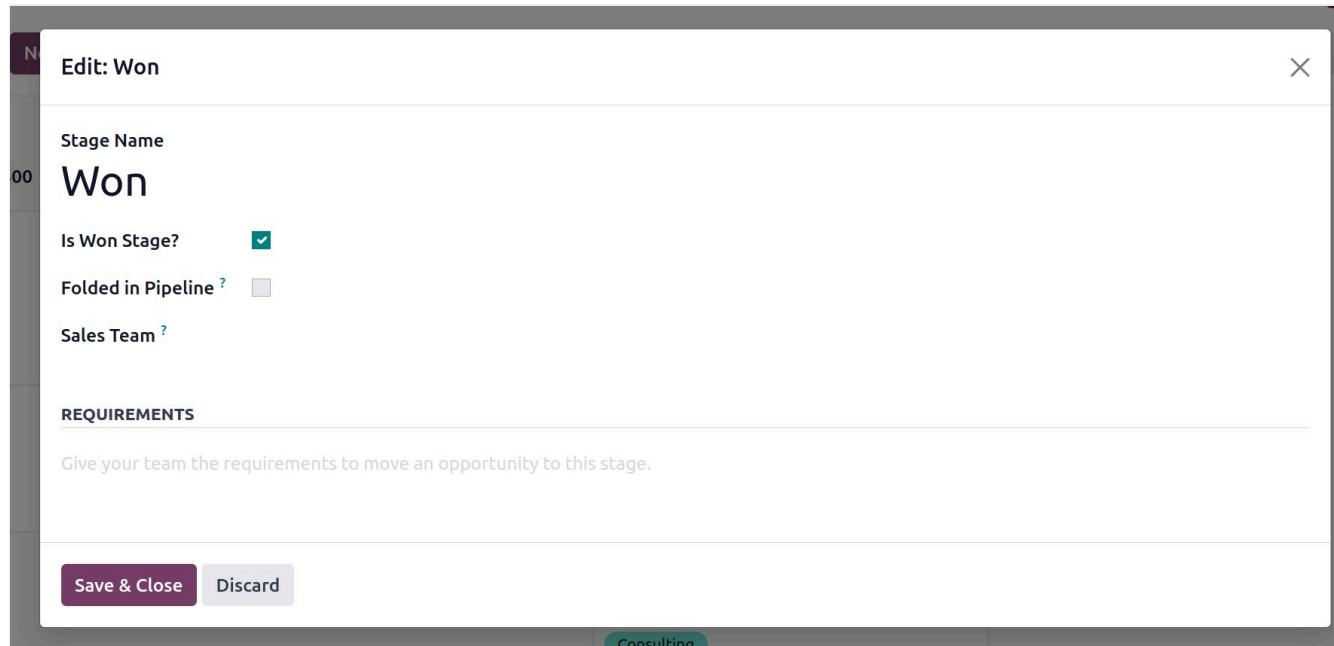
The screenshot displays a project management dashboard with a top navigation bar in Persian. The main content area is divided into two columns: 'Proposition' and 'Won'. The 'Proposition' column shows a progress bar at 26,300 and a list of items including 'Modern Open Space' (\$4,500.00) and 'Office Design and Architecture' (\$9,000.00). The 'Won' column shows a progress bar at 85,400 and a list of items including 'Distributor Contract' (\$19,800.00), '5 VP Chairs' (\$5,600.00), and 'Need 20 Desks' (\$60,000.00). On the right side, there is a 'stage...' input field with an 'Add' button, highlighted by a red box. Below the input field, there are three grey rectangular boxes representing stages. A tooltip at the bottom of the red box says 'Press Esc to discard'.

As seen in the screenshot below, after creating a new stage, you may modify its settings by clicking the gear icon that displays next to the stage's title.



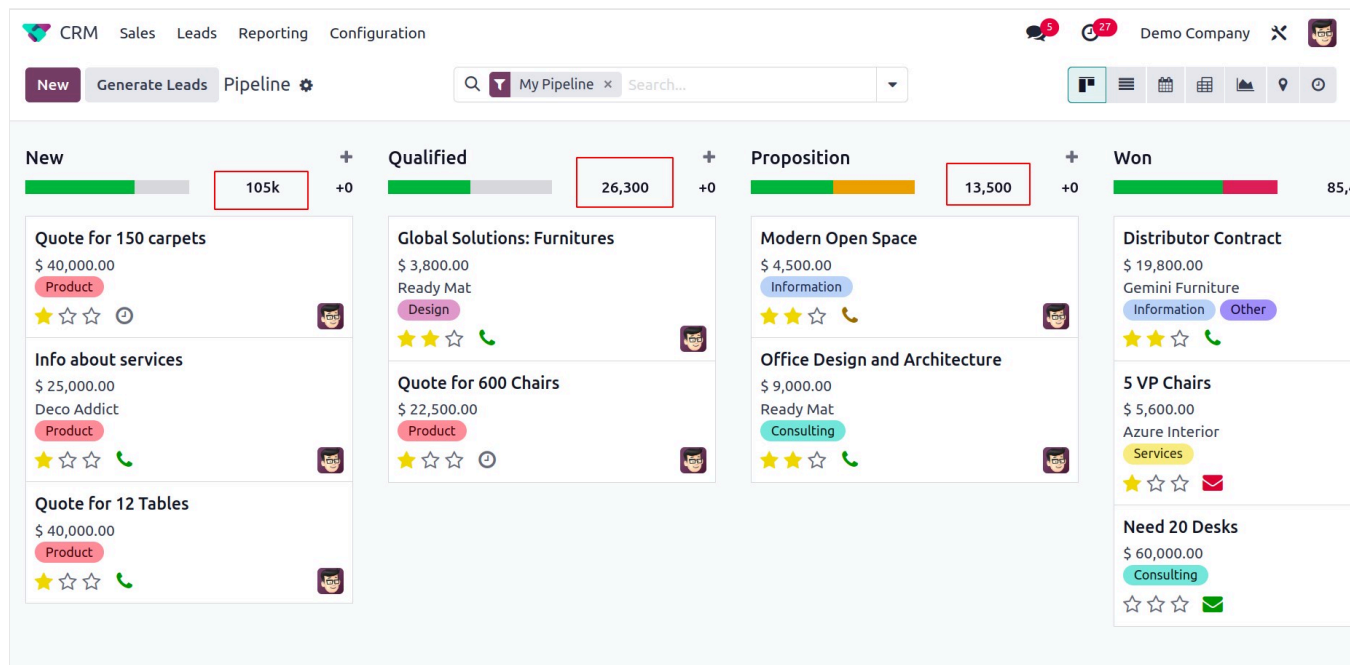


Depending on your needs, you can **Fold, Edit, Automation** And **Delete** the stage with this symbol. You can edit the appropriate stage in the pop-up box that appears when you click the Edit button.

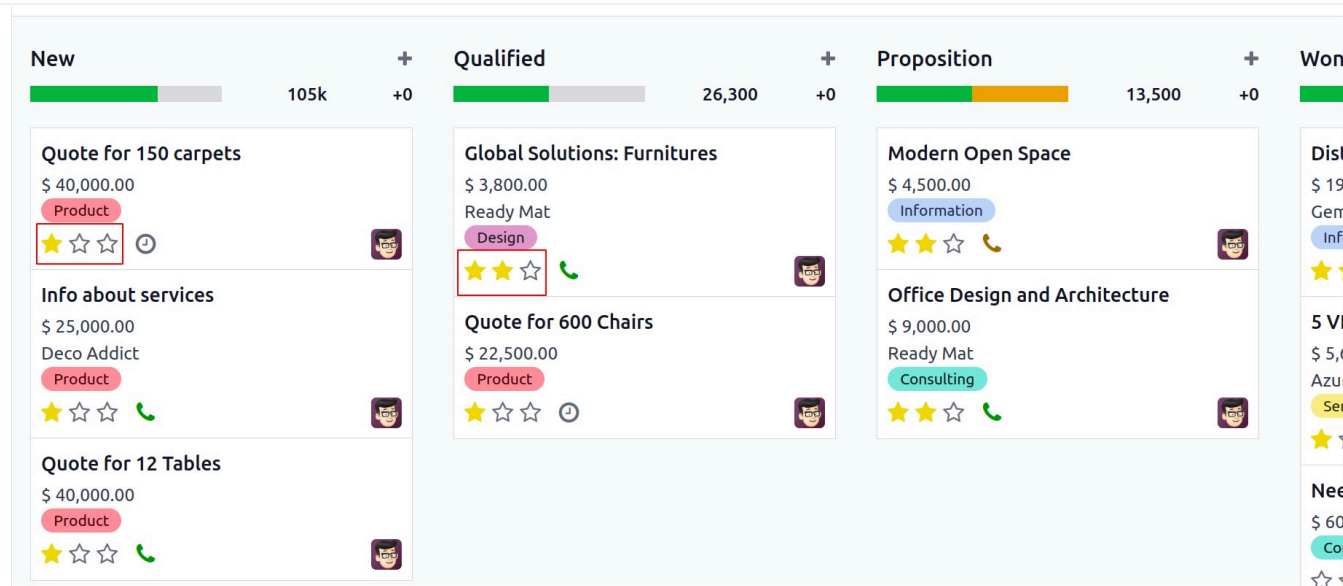


view. You are permitted to identify a specific sales team that utilizes this stage in the **Sales Team** section. Other sales teams not specifically indicated in the supplied field will not be able to see or use this stage. In order for the team members to have a clear understanding of the criteria for this specific stage, the requirements to transfer leads to this stage can be given in the criteria section. Don't forget to click the **Save** button once you've finished modifying the column to save all of your changes.

The top right corner of the relevant stages, which is emphasized in the figure below, displays the **Expected Revenue** from each step. By using the drag and drop functionality, you can adjust the phases of leads. The estimated revenue will be immediately adjusted depending on the new record by altering the stage of one lead.

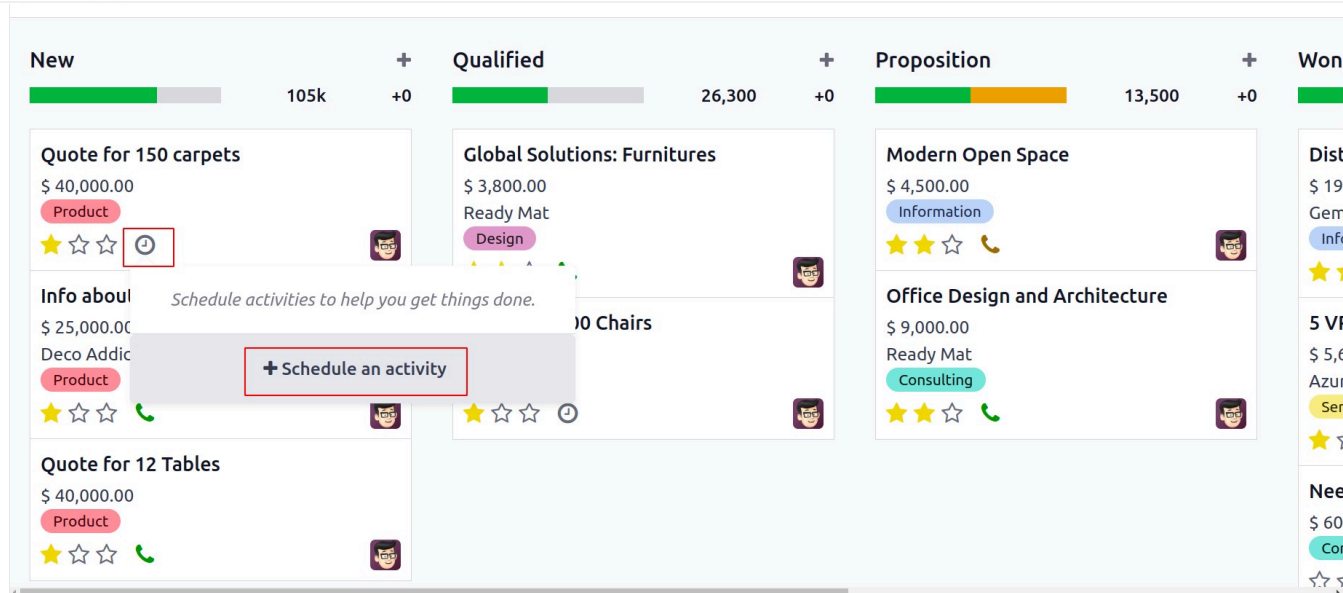


You can find three stars to indicate the lead's **Priority** on each lead record. You can assign **Medium**, **High**, or **Very High** stars based on the lead's priority. This will make it easier to find high-value leads.

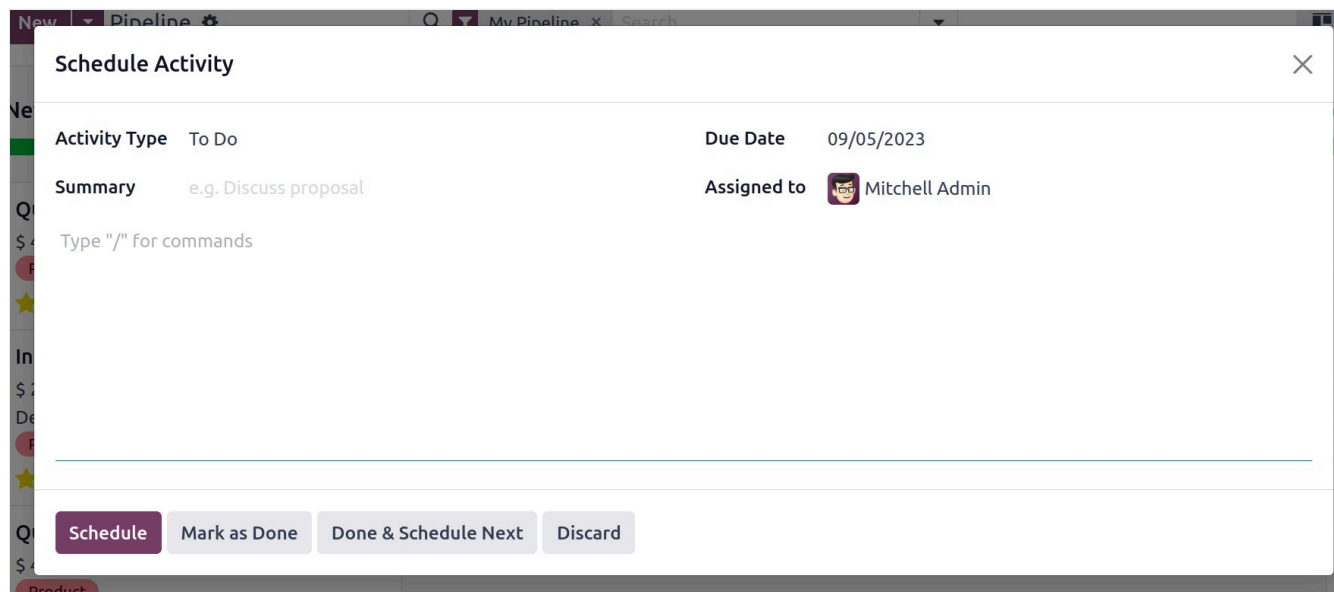


You may arrange several lead activities right from the main dashboard. The tiny clock indicator, which is displayed in the image below, will let you schedule various activities. If there are any scheduled activities, Odoo 17 will display a list of them as soon as you click on this icon.

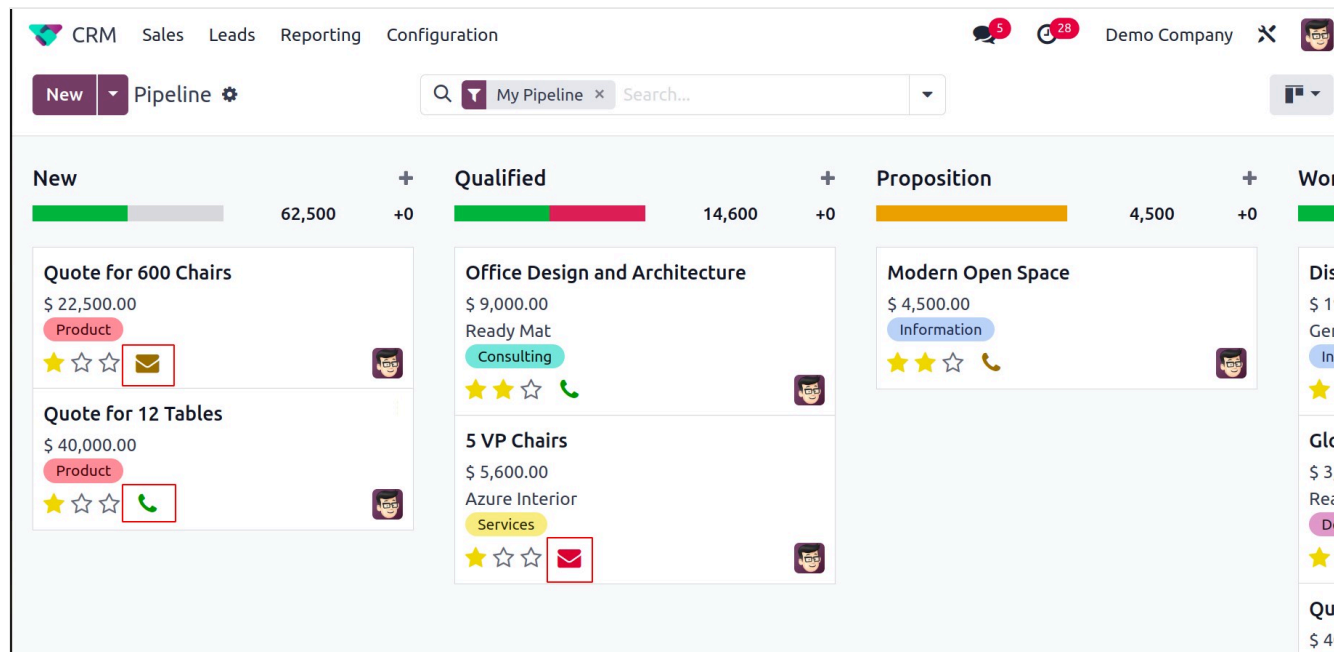




If not, you may create a new one by selecting the **Schedule An Activity button**. You can create new activities by using a new wizard that Odoo 17 will send you to.



You can choose the necessary activity you intend to schedule in the **Activity Type** box of the new activity schedule dialogue. Along with this, you may use the provided space to briefly describe the activity's **Summary**. In the **Assigned To** area, designate a worker who will keep an eye on this action. Last but not least, don't forget to provide the activity's **Due Date**. Finally, by selecting the Schedule button, you may set the activity into your schedule. The **Mark as Done** button can be used once the task is finished. The **Done & Schedule Next button** can be used if you have already finished one scheduled activity and wish to arrange a new one. Use the **Discard** button to stop the planned activity. The planned activities are highlighted in green. Overdue actions are shown in the red color. Today's scheduled activities will be displayed in brown.



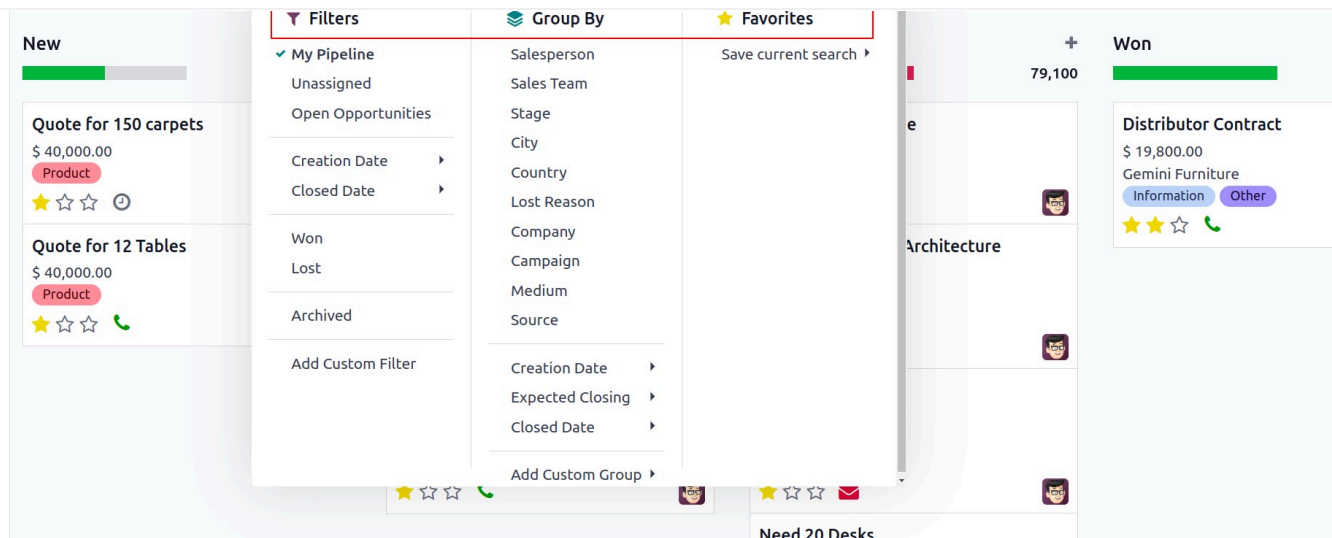
You may now add clients to the call queue, which is a new functionality added to the Odoo 17 CRM module. The clock symbol, which is used to schedule activities, is close to this choice. You can add leads to the call queue with only one click. If you click it again, the icon will be removed from the call

The screenshot displays the Odoo CRM Pipeline interface. At the top, there are navigation tabs for CRM, Sales, Reporting, and Configuration. The current view is 'My Pipeline' with a search bar. The pipeline is divided into four stages: New (80,000), Qualified (51,300), Proposition (79,100), and Won. A form for adding a new lead is highlighted in the 'New' stage. The form includes fields for Organization / Contact, Opportunity (with examples like Product Pricing), Email (with example email@address.com), Phone (with example 0123456789), and Expected Revenue (with example \$0.00 and star ratings). There are 'Add' and 'Edit' buttons at the bottom of the form. The main pipeline area shows several leads in the 'Proposition' stage, such as 'Global Solutions: Furnitures' (\$3,800.00), 'Quote for 600 Chairs' (\$22,500.00), 'Info about services' (\$25,000.00), 'Modern Open Space' (\$4,500.00), 'Office Design and Architecture' (\$9,000.00), '5 VP Chairs' (\$5,600.00), and 'Need 20 Desks' (\$60,000.00). A 'Distributor Contract' (\$19,800.00) is shown in the 'Won' stage.

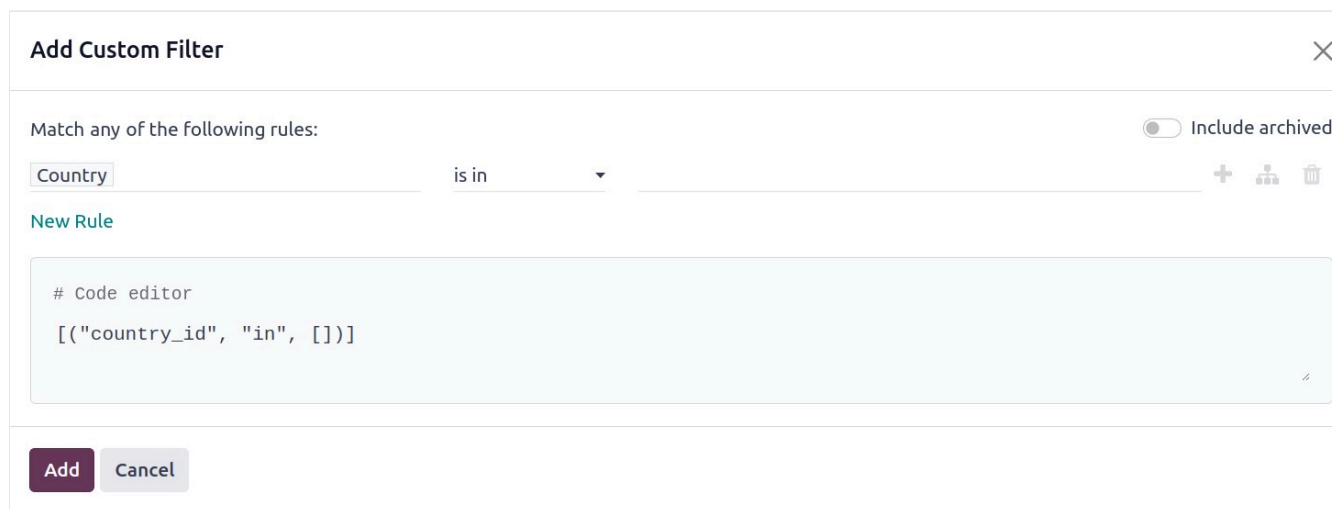
Using this feature, you can easily add new leads under each step. In the space provided, enter the name of the organization or Contact. You can also fill in the appropriate boxes with the opportunity's title, email, phone number, and expected revenue. By selecting the **Add** button, the new lead will be added to the appropriate stage. Use the **Edit** button to alter the lead details if you want to.

گزینه های Odoo 17 CRM کمک می کند. در Odoo ارائه گزینه های مرتب سازی پیچیده به آسان تر کردن روند جستجوی شامل تعدادی گزینه مرتب سازی برای دسترسی سریع و ساده به داده های مورد نیاز **Filters**, **Group By** و **Favorites** است.





کلیک می شود، یک پنجره باز می شود که در آن کاربر می تواند قوانین خاصی Add Custom Filter هنگامی که گزینه را برای فیلتر کردن اضافه کند.
















نگاه می کنیم، یک پیش نمایش پیشرفته به همراه اطلاعاتی در مورد فرصت، نام CRM هنگامی که به نمای فهرست خط لوله تماس، ایمیل، تلفن، شرکت، فروشنده، فعالیت بعدی، مهلت من، درآمد مورد انتظار و مرحله خواهید دید.

<input type="checkbox"/>	Opportunity	Contact Name	Email	Salesperson	Expected Revenue	Stage	
<input type="checkbox"/>	Modern Open Space	Henry Jordan	henry@elight.com	Mitchell Admin	\$ 4,500.00	Proposition	Email  SMS  Snooze 7d
<input type="checkbox"/>	Office Design and Architect...		info@deltapc.example.com	Mitchell Admin	\$ 9,000.00	Proposition	Email  SMS
<input type="checkbox"/>	Distributor Contract	John M. Brown	john.b@tech.info	Mitchell Admin	\$ 19,800.00	Won	Email  SMS
<input type="checkbox"/>	Global Solutions: Furnitures	Robin Smith	info@deltapc.example.com	Mitchell Admin	\$ 3,800.00	Qualified	Email  SMS  Snooze 7d
<input type="checkbox"/>	Quote for 600 Chairs	Erik N. French	ErikNFrench@armyspy.com	Mitchell Admin	\$ 22,500.00	Qualified	Email  SMS
<input type="checkbox"/>	Quote for 150 carpets	Erik N. French	ErikNFrench@armyspy.com	Mitchell Admin	\$ 40,000.00	New	Email  SMS
<input type="checkbox"/>	5 VP Chairs	Benjamin Flores	vauxoo@yourcompany.exa...	Mitchell Admin	\$ 5,600.00	Proposition	Email  SMS  Snooze 7d
<input type="checkbox"/>	Info about services		info@agrolait.com	Mitchell Admin	\$ 25,000.00	Qualified	Email  SMS  Snooze 7d
<input type="checkbox"/>	Quote for 12 Tables	Will McEncroe	willmac@rediffmail.example...	Mitchell Admin	\$ 40,000.00	New	Email  SMS  Snooze 7d
<input type="checkbox"/>	Need 20 Desks		info@mycompany.net	Mitchell Admin	\$ 60,000.00	Proposition	Email  SMS  Snooze 7d
					\$ 230,200.00		

با کلیک بر روی نام یک فروشنده، یک جعبه پیام باز می شود که اگر می خواهید با فروشنده تماس بگیرید، مستقیماً شما را با آن فروشنده پیوند می دهد. همچنین گزینه های ایمیل و پیامک را در هر سرخ پیدا خواهید کرد که می توانید از آنها برای تماس با مشتری مربوطه استفاده کنید.



Opportunity	Contact Name	Email	Salesperson	Expected Revenue	Stage
<input type="checkbox"/> Modern Open Space	Henry Jordan	henry@elight.com	 Mitchell Admin	\$ 4,500.00	Proposition   Snooze 7d
<input type="checkbox"/> Office Design and Architect...		info@deltapc.example.com	 Mitchell Admin	\$ 9,000.0	 Mitchell Admin
<input type="checkbox"/> Distributor Contract	John M. Brown	john.b@tech.info	 Mitchell Admin	\$ 19,800.0	
<input type="checkbox"/> Global Solutions: Furnitures	Robin Smith	info@deltapc.example.com	 Mitchell Admin	\$ 3,800.0	
<input type="checkbox"/> Quote for 600 Chairs	Erik N. French	ErikNFrench@armyspy.com	 Mitchell Admin	\$ 22,500.0	
<input type="checkbox"/> Quote for 150 carpets	Erik N. French	ErikNFrench@armyspy.com	 Mitchell Admin	\$ 40,000.0	
<input type="checkbox"/> 5 VP Chairs	Benjamin Flores	vauxoo@yourcompany.exa...	 Mitchell Admin	\$ 5,600.0	
<input type="checkbox"/> Info about services		info@agrolait.com	 Mitchell Admin	\$ 25,000.0	
<input type="checkbox"/> Quote for 12 Tables	Will McEncroe	willmac@rediffmail.example...	 Mitchell Admin	\$ 40,000.0	
<input type="checkbox"/> Need 20 Desks		info@mycompany.net	 Mitchell Admin	\$ 60,000.0	
				\$ 230,200.0	

Message Mitchell Admin...

There are no messages in this conversation.

با اضافه کردن اطلاعات بیشتر در مورد یک سرخ، مانند ایجاد شده در، مشتری، شهر، ایالت، کشور، تیم فروش، اولویت، شریک تعیین شده، فعالیت توسط، کمپین، متوسط، منبع، بسته شدن مورد انتظار و احتمال، می توانید پیش نمایش لیست را بهبود بخشید .



Opportunity	Contact Name	Email	Salesperson	Expected Revenue	Stage	
Modern Open Space	Henry Jordan	henry@elight.com	Mitchell Admin	\$ 4,500.00	Proposition	Email
Office Design and Architect...		info@deltapc.example.com	Mitchell Admin	\$ 9,000.00	Proposition	Email
Distributor Contract	John M. Brown	john.b@tech.info	Mitchell Admin	\$ 19,800.00	Won	Email
Global Solutions: Furnitures	Robin Smith	info@deltapc.example.com	Mitchell Admin	\$ 3,800.00	Qualified	Email
Quote for 600 Chairs	Erik N. French	ErikNFrench@armyspy.com	Mitchell Admin	\$ 22,500.00	Qualified	Email
Quote for 150 carpets	Erik N. French	ErikNFrench@armyspy.com	Mitchell Admin	\$ 40,000.00	New	Email
5 VP Chairs	Benjamin Flores	vauxoo@yourcompany.exa...	Mitchell Admin	\$ 5,600.00	Proposition	Email
Info about services		info@agrolait.com	Mitchell Admin	\$ 25,000.00	Qualified	Email
Quote for 12 Tables	Will McEncroe	willmac@rediffmail.example...	Mitchell Admin	\$ 40,000.00	New	Email
Need 20 Desks		info@mycompany.net	Mitchell Admin	\$ 60,000.00	Proposition	Email
				\$ 230,200.00		

- Created on
- Customer
- Contact Name
- Phone
- Company
- City
- State
- Country
- Salesperson
- Sales Team
- Priority
- Activities
- Activity by
- My Deadline
- Campaign

نگاه می کنیم **My Activities** صحبت می کنیم. اکنون به پنجره CRM ماژول My Pipeline در حال حاضر، ما در مورد پنجره

CRM Sales Reporting Configuration Demo Company

New My Pipeline My Activities My Quotations Teams Customers

Opportunity	Contact Name	Email	Salesperson	Expected Revenue	Stage	
Modern Open Space	Henry Jordan	henry@elight.com	Mitchell Admin	\$ 4,500.00	Proposition	Email SMS Snooze 7d
Office Design and Architect...		info@deltapc.example.com	Mitchell Admin	\$ 9,000.00	Proposition	Email SMS
Distributor Contract	John M. Brown	john.b@tech.info	Mitchell Admin	\$ 19,800.00	Won	Email SMS
Global Solutions: Furnitures	Robin Smith	info@deltapc.example.com	Mitchell Admin	\$ 3,800.00	Qualified	Email SMS Snooze 7d
Quote for 600 Chairs	Erik N. French	ErikNFrench@armyspy.com	Mitchell Admin	\$ 22,500.00	Qualified	Email SMS
Quote for 150 carpets	Erik N. French	ErikNFrench@armyspy.com	Mitchell Admin	\$ 40,000.00	New	Email SMS
5 VP Chairs	Benjamin Flores	vauxoo@yourcompany.exa...	Mitchell Admin	\$ 5,600.00	Proposition	Email SMS Snooze 7d
Info about services		info@agrolait.com	Mitchell Admin	\$ 25,000.00	Qualified	Email SMS Snooze 7d
Quote for 12 Tables	Will McEncroe	willmac@rediffmail.example...	Mitchell Admin	\$ 40,000.00	New	Email SMS Snooze 7d
Need 20 Desks		info@mycompany.net	Mitchell Admin	\$ 60,000.00	Proposition	Email SMS Snooze 7d
				\$ 230,200.00		



CRM Sales Reporting Configuration Demo Company

New Generate Leads My Activities

My Activities Search...

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Opportunity	Contact Name	Email	Expected Revenue	Stage	
5 VP Chairs	Benjamin Flores	vauxoo@yourcompany.example.com	\$ 5,600.00	Proposition	Email SMS Snooze 7d
Modern Open Space	Henry Jordan	henry@elight.com	\$ 4,500.00	Proposition	Email SMS Snooze 7d
DeltaPC: 10 Computer Desks	Leland Martinez	info@deltapc.example.com	\$ 35,000.00	Qualified	Email SMS Snooze 7d
Info about services		info@agrolait.com	\$ 25,000.00	Qualified	Email SMS Snooze 7d
Access to Online Catalog		lumber-inv92@example.com	\$ 2,000.00	Won	Email SMS Snooze 7d
Global Solutions: Furnitures	Robin Smith	info@deltapc.example.com	\$ 3,800.00	Qualified	Email SMS Snooze 7d
Need 20 Desks		info@mycompany.net	\$ 60,000.00	Proposition	Email SMS Snooze 7d
Office Design Project		info@agrolait.com	\$ 24,000.00	New	Email SMS Snooze 7d
Quote for 12 Tables	Will McEncroe	willmac@rediffmail.lexample.com	\$ 40,000.00	New	Email SMS Snooze 7d
			\$ 199,900.00		

&lt; قبلی

&gt; بعدی



## کالیکوت

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Kakkancherry, Calicut  
Kerala, India - 673635



## کوچی

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، اینفو پارک، کاکاناد  
، کوچی، هند - 682030

## برای ما پیام ارسال کنید

نام و نام خانوادگی

پست الکترونیک

تلفن





## بنگلور

Cybrosys Techno Solutions  
طیقه هشتم، The Estate،  
جاده دیکنسون،  
بنگلور، هند - 560042

ارسال

### لینک های سریع

- اودو
- Odoo برنامه های
- Odoo بسته موفقیت
- Odoo شرکای
- کد منبع را بخريد
- با ما تماس بگيريد
- داستان های وب
- نقشه سایت

### خدمات

- Odoo سفارشی سازی
- را Odoo توسعه دهنده
- استخدام کنید
- Odoo پیاده سازی
- Odoo ادغام
- Odoo پشتیبانی
- Odoo مهاجرت
- Odoo مشاوره
- Odoo آموزش
- Odoo مجوز

### ارجاع

- Odoo ERP
- Odoo نرم افزار
- SAP در مقابل Odoo
- Odoo vs Dynamics
- Odoo vs ERP Next
- Odoo vs Netsuite
- اودو در مقابل سیج
- Odoo vs Sugar CRM
- Odoo در مقابل Zoho
- CRM

### در تماس باش

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- info@cybrosys.com
- 8606827707 91+

### ارتباط اجتماعی برقرار کنید

