RIYMAR CRM WORKFLOW

Riymar CRM

ABSTRACT

Riymar CRM is a comprehensive platform that simplifies lead management, sales processes, and customer engagement. It offers tools for automated lead assignment, enrichment, and conversion, alongside activity tracking, sales team management, and reporting. With customizable workflows and data-driven insights, Riymar CRM .enhances productivity, customer satisfaction, and business growth

Riymar Team

Riymar CRM Workflow

The Riymar CRM is an advanced client relation management aspect of the platform that 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 more.

Operational Principles

The Riymar CRM operations are based on the principles of pipeline operation, where data is marked according to the various statuses of the operation. Each data point is marked upon the status of a contact or a business opportunity. These statuses can be customized based on the user's requirements.

- **Default Operation**: Describes new leads or potential business opportunities.
- **Opportunity Stage**: When an opportunity is available, a quotation is sent. Upon acceptance, it is turned into a qualified lead after analyzing its potential.
- **Business Opportunity Won**: The quotation is changed to a sales order, the products are invoiced, and finally, payment is completed.

System Users

The Riymar platform allows three types of system users to be configured for managing the operations of the company:

- **Manager**:
  - Has access to all sales and purchase aspects of the company.
  - Allocation can be done based on departments if there is more than one manager.
- **User - Documents Only**:
  - Has control over specific reports and documents.
  - Cannot access or configure sales or purchase documents.
- **User - All Documents**:
  - Has access to all reports and documents of the company.
  - Suitable for roles like business head, CEO, or company owner.

Activities in CRM

The Riymar platform allows users to create and schedule various activities with customers as part of the CRM operations. Customizing lead management and operating on them through communication and information-sharing is highly beneficial for company operations.

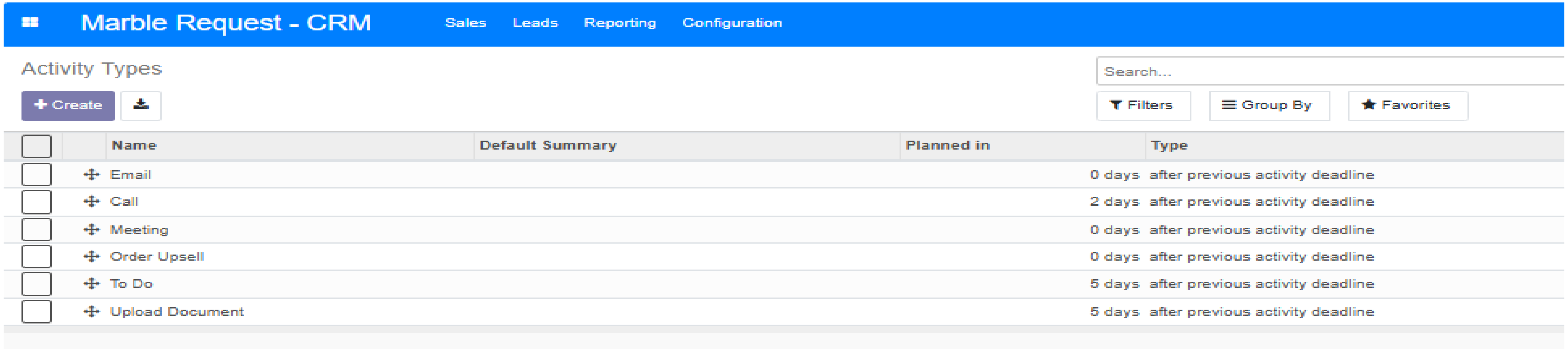
Activity Types

Users can create and configure various activity types within the CRM module by accessing the **Activity Type** menu from the configuration dashboard.

Summary

The Riymar CRM is designed to streamline operations from lead generation to payment completion. With customizable workflows, user roles, and activity management, it provides a comprehensive system for managing customer relationships and business opportunities effectively.

Managing Activities in Riymar CRM

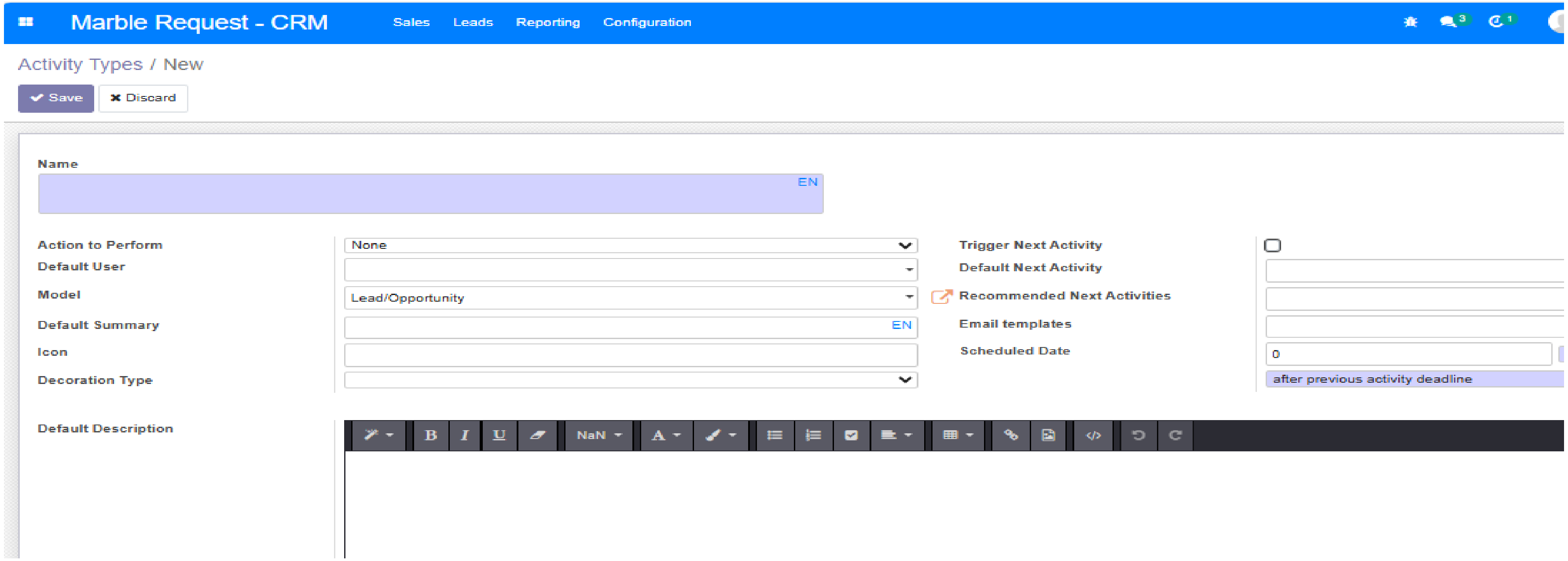


Users can manage activities by either editing existing ones or creating new ones as needed. The system provides the following features for each activity:

- **Default Description:** Predefined descriptions that can be customized.
- **Default User:** Assign a user to the activity by default.
- **Action:** Specify the required action for the activity.
- **Next Activity Trigger:** Set triggers for the next activity in the sequence.
- **Schedule Duration:** Define the duration for the activity schedule.

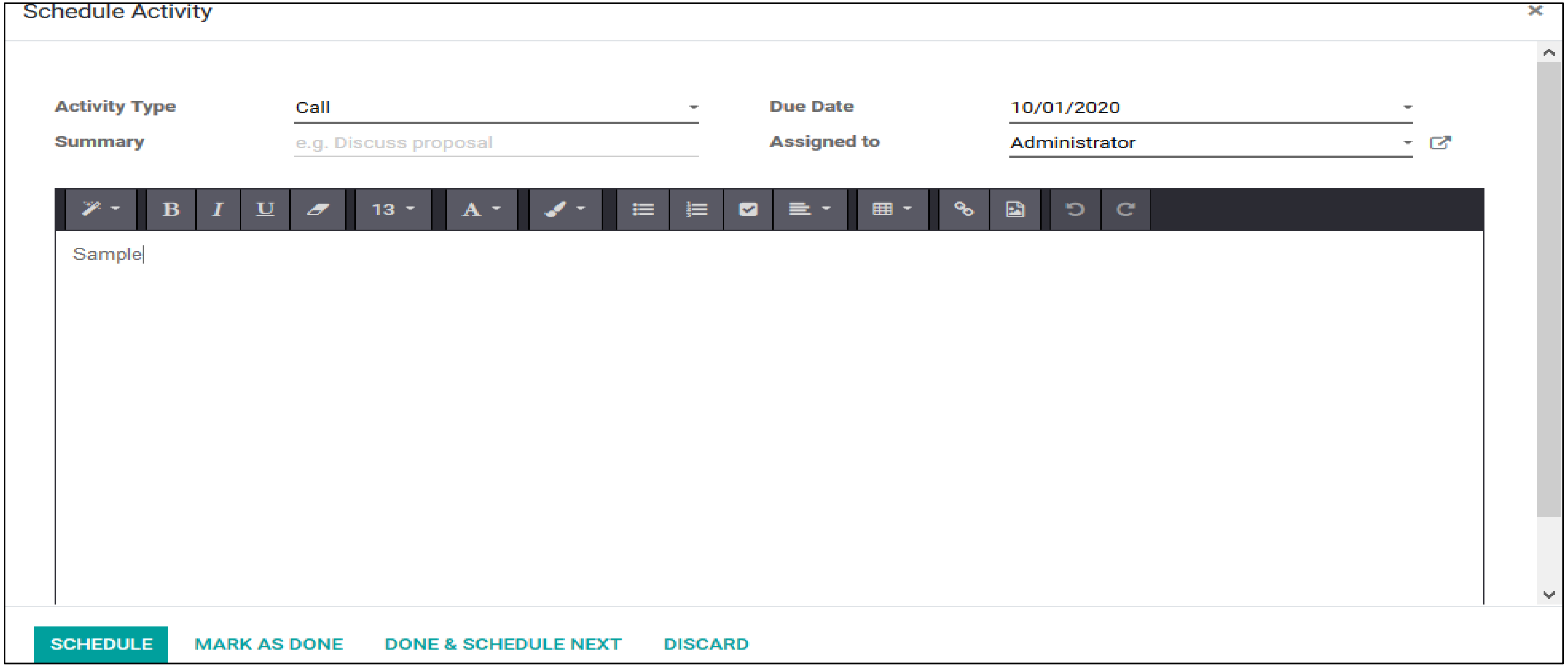
Users can easily select the **"Create"** option to add new activities when necessary.

Scheduling a Chain of Activities



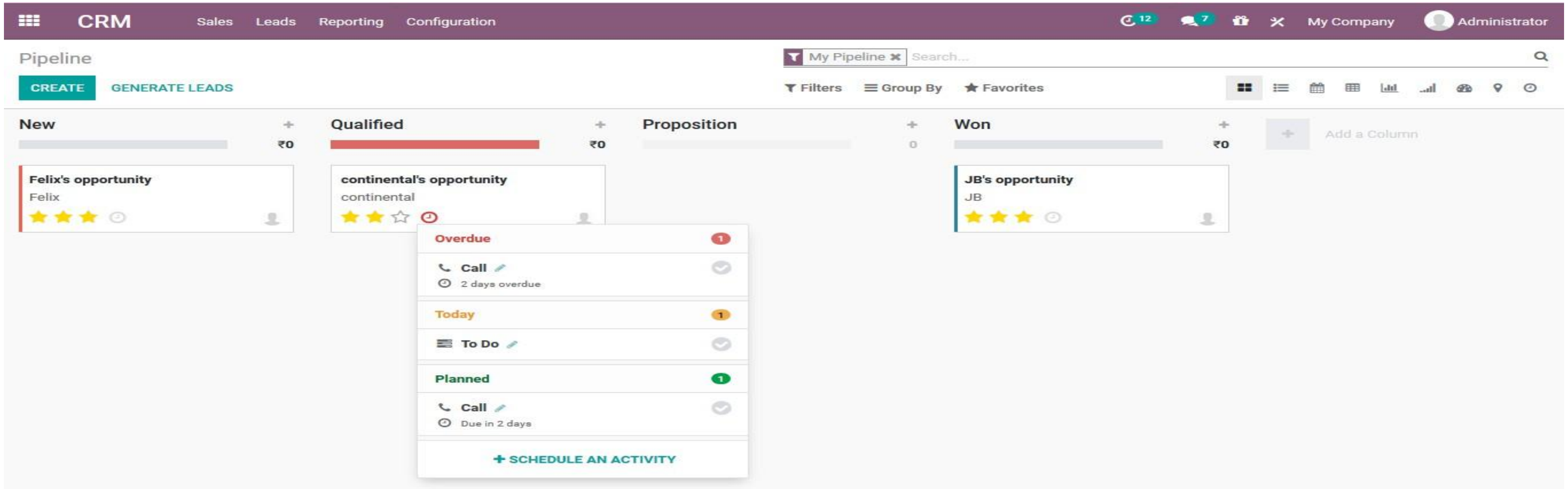
- **Activity Type Menu:** Users can utilize the activity type menu to add a default "next activity" option. This allows activities to be automatically scheduled to follow upon the completion of the main activity.
- **Prioritization:**
  The sequence of activities is organized based on their descriptions and assigned priorities.
- **Direct Scheduling from CRM Dashboard:**
  Activities can be scheduled directly from the CRM dashboard, tailored to each opportunity or lead. This ensures a streamlined workflow and better management of tasks.

Activity Tracking



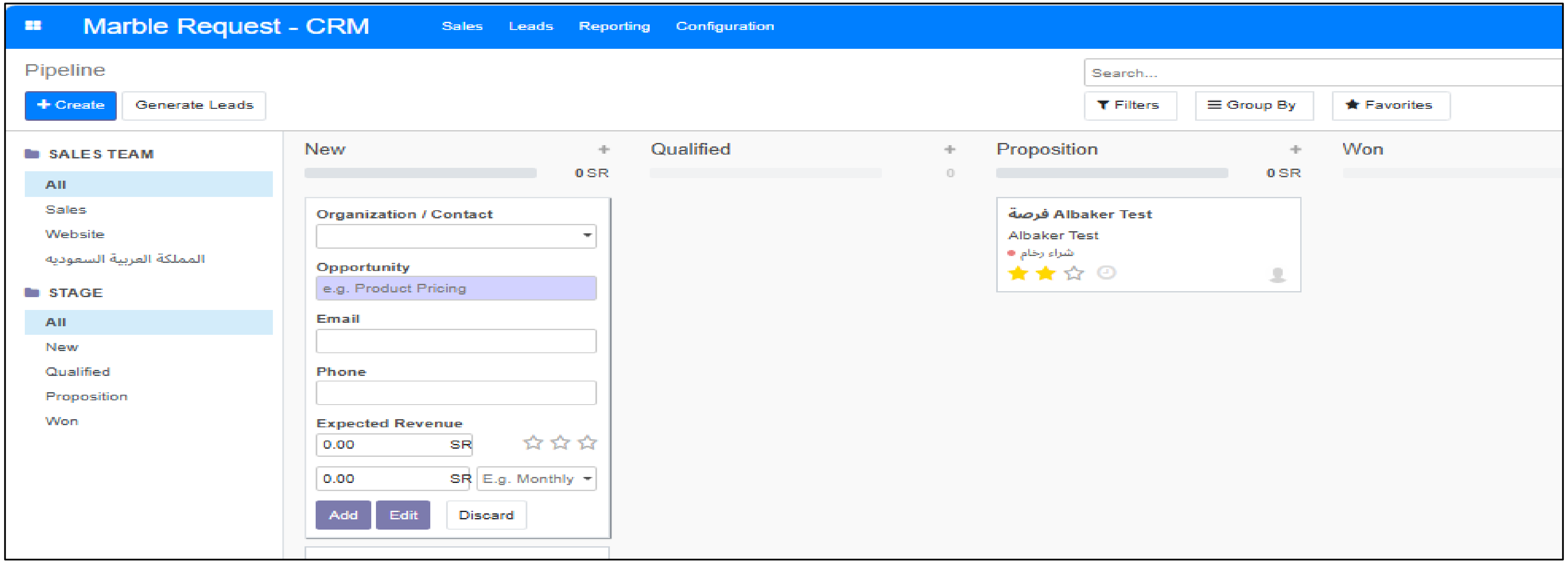
- **Viewing Scheduled Activities:**
  Users can view all scheduled activities associated with a lead directly from the CRM dashboard.
- **Tracking Features:**
  Riymar CRM provides a robust tracking feature, enabling users to monitor the status and progress of all scheduled activities efficiently.

Adding New Leads



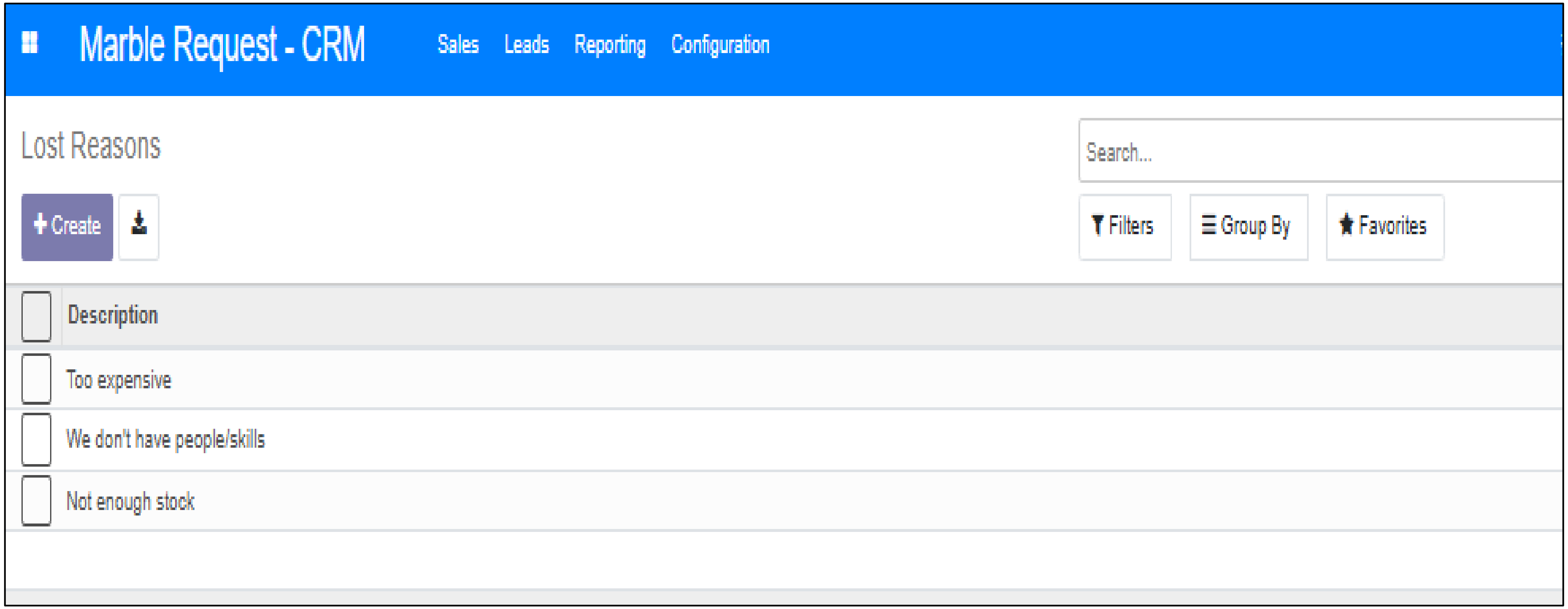
- **Adding Leads via CRM Dashboard:**
  Users can add new leads directly from the CRM dashboard.
- **Lead Information:**
  The system enables users to generate themes based on:
  - **Contact Information:** Details of the lead.
  - **Revenue Options:** Potential revenue associated with the lead.
  - **Priority Levels:** Assigning a priority to each lead for better management.

Managing Lost Opportunities



- **Lost Opportunities in Riymar CRM:**
  The platform includes a dedicated feature for managing lost opportunities within the CRM module.
- **Lost Reasons Menu:**
  - Users can allocate reasons for lost opportunities through the **Lost Reasons** menu, available in the configuration tab.
  - This allows for better tracking and analysis of missed opportunities.
- **Customization Options:**
  - Lost reasons can be created, modified, or removed according to the user's requirements.
  - This flexibility helps in tailoring the system to specific business needs.

Managing Leads and Opportunities

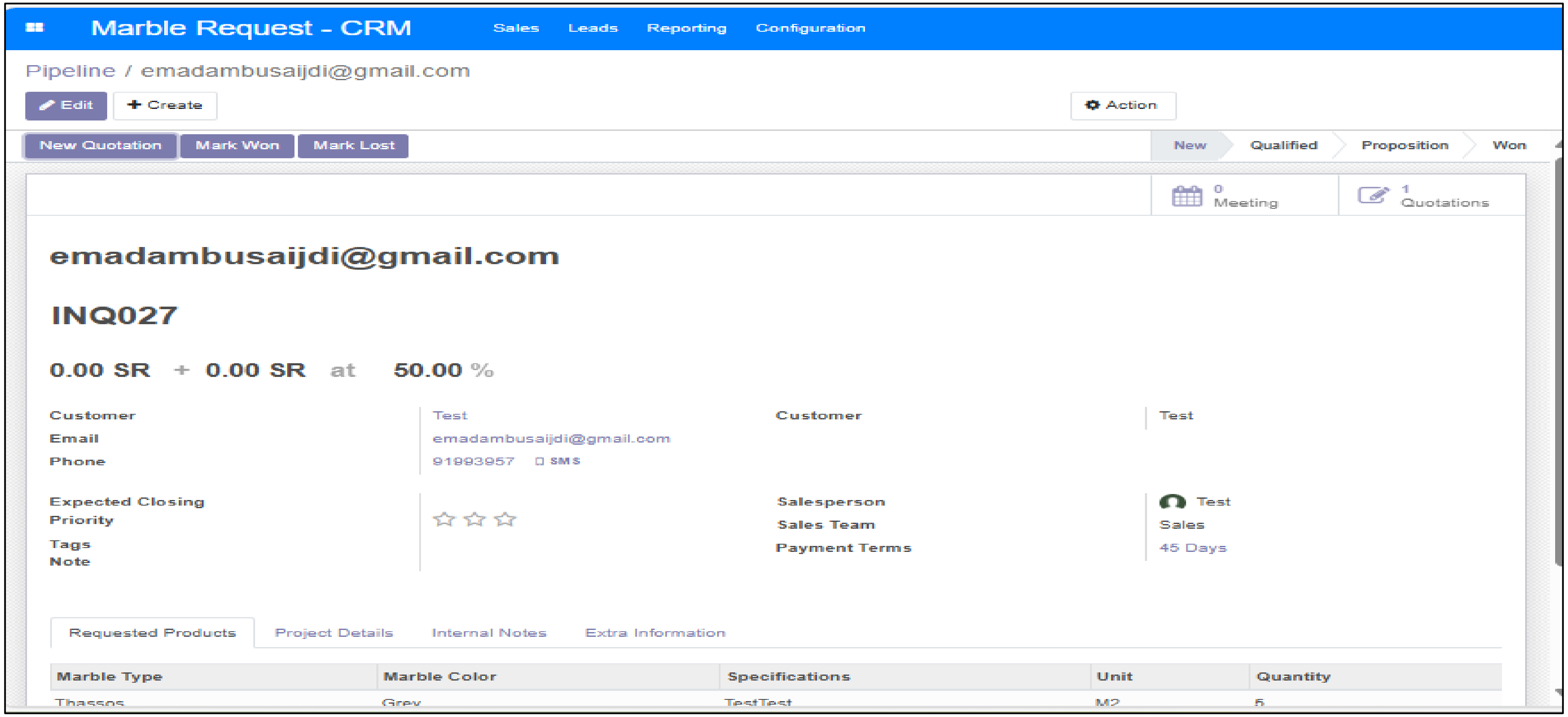


Within the menu of each lead or opportunity, users have the following options:

- **Mark as Won:** Indicate that the lead has been successfully converted.
- **Mark as Lost:** Record the lead as a lost opportunity.
- **Delete:** Remove the lead or opportunity from the system if no longer needed.

These actions help streamline lead management and ensure accurate record-keeping.

Selecting an Activity as Lost

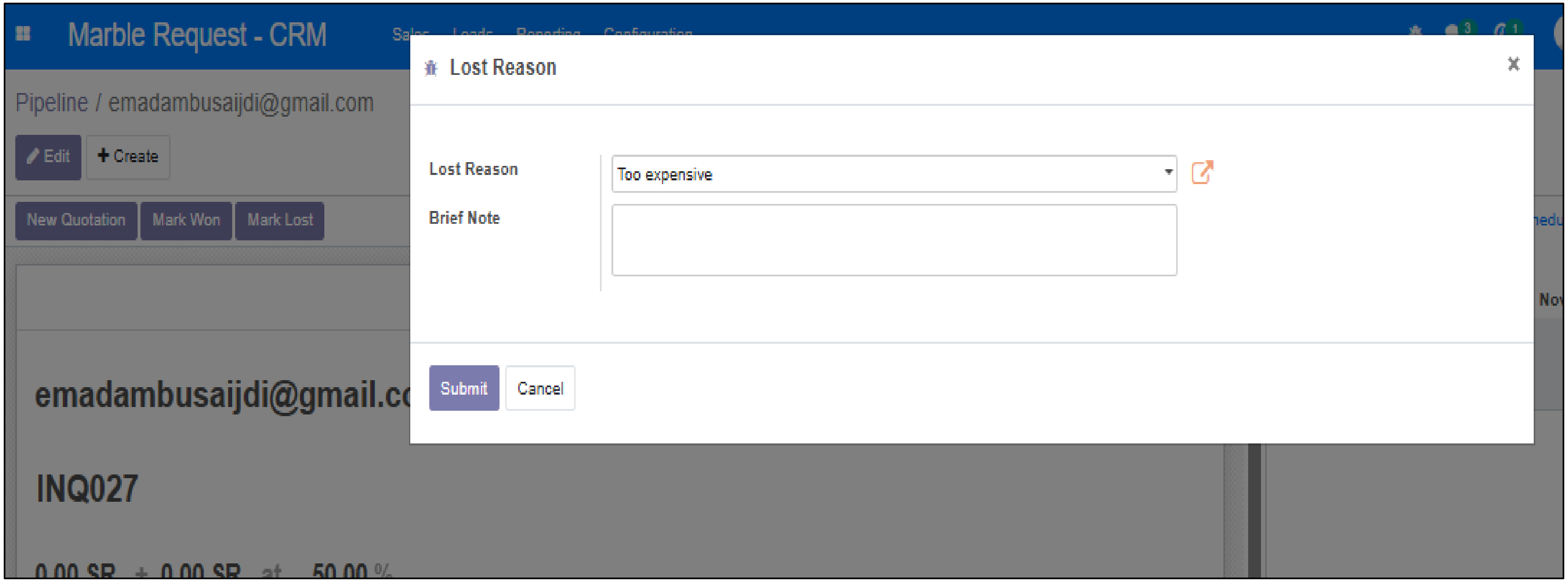


When an activity is marked as **lost**, a pop-up window will appear, allowing the user to:

- **Select a Reason for the Loss:** Choose from predefined options or create a new reason.

This feature ensures that the reasons for lost activities are documented for future analysis and improvement.

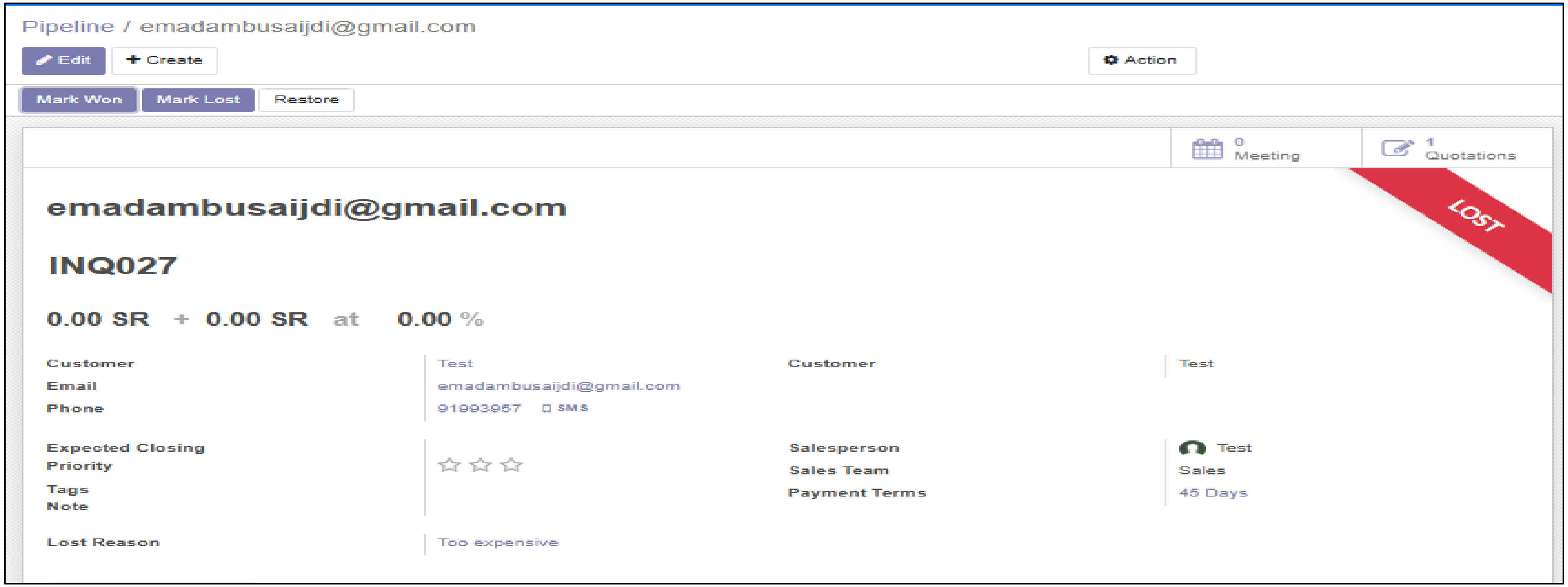
Handling Lost Opportunities



- **Marking a Lead as Lost:**
  Once a reason for the loss is assigned, the lead is marked as **lost** under the **Opportunity** menu.
- **Restoring Lost Opportunities:**
  The system provides a feature to restore a lost opportunity at any time if it becomes viable again.

This functionality ensures flexibility in managing opportunities and recovering potential leads when circumstances change.

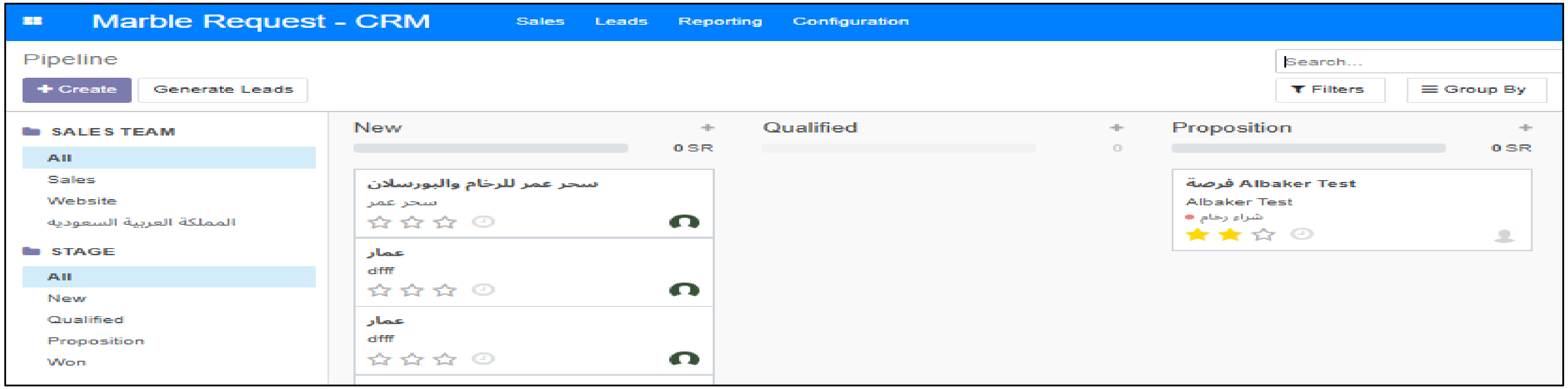
Viewing Lost Opportunities



- **Filter Lost Opportunities:**
  Lost opportunities can be easily viewed by applying filters in the dashboard.
- **Specific Filtering Options:**
  Users can filter lost opportunities based on specific **lost reasons**, enabling a more detailed and targeted analysis of lost activities.

This feature helps in identifying patterns and improving future strategies.

Lead Acquirement in Riymar CRM



Simplified Lead Recruitment

- Riymar CRM streamlines the process of lead recruitment, reducing stress for sales managers and team members.
- This improvement enhances productivity and contributes to increased company profits.

Automated Lead Assignment

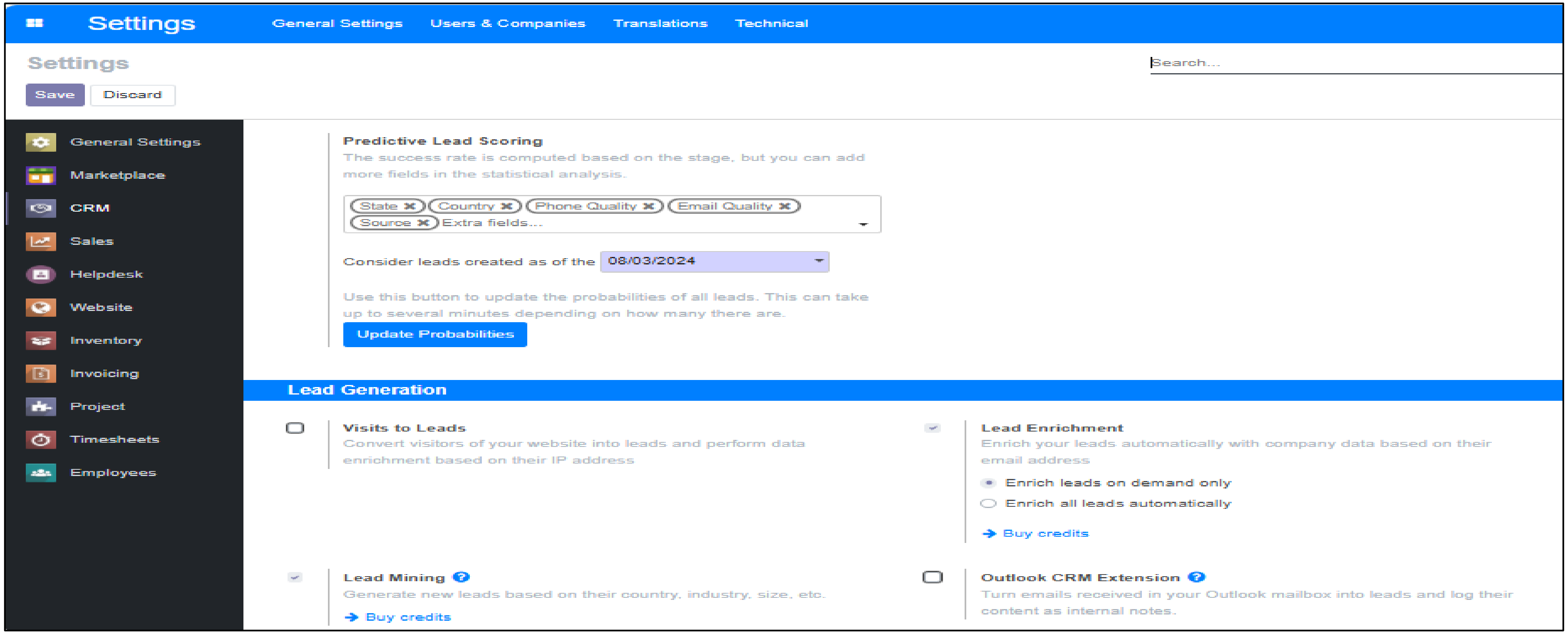
- The platform offers automated lead assignment to sales representatives.
- Assignments are based on tag allocations for each lead, simplifying operations for managers and executives.

Lead Mining

- Riymar CRM includes a lead mining feature, allowing users to search and generate leads using specific parameters, such as:
    - **Country of Operation:** Locate leads in specific geographic areas.
    - **Company Size:** Identify leads based on the size of the target company.
    - **Technology Used:** Filter leads by the technologies employed by potential customers.
    - **Products Produced:** Target companies based on their product offerings.

This comprehensive approach ensures efficient lead acquisition and management.

Advanced Lead Features in Riymar CRM



Lead Enrichment

- An advanced feature that enhances leads using a single contact address.
- Users can generate additional contact information for leads using available email IDs.
- Searches are conducted across social media platforms and external websites to gather comprehensive results.

Outlook CRM Extension

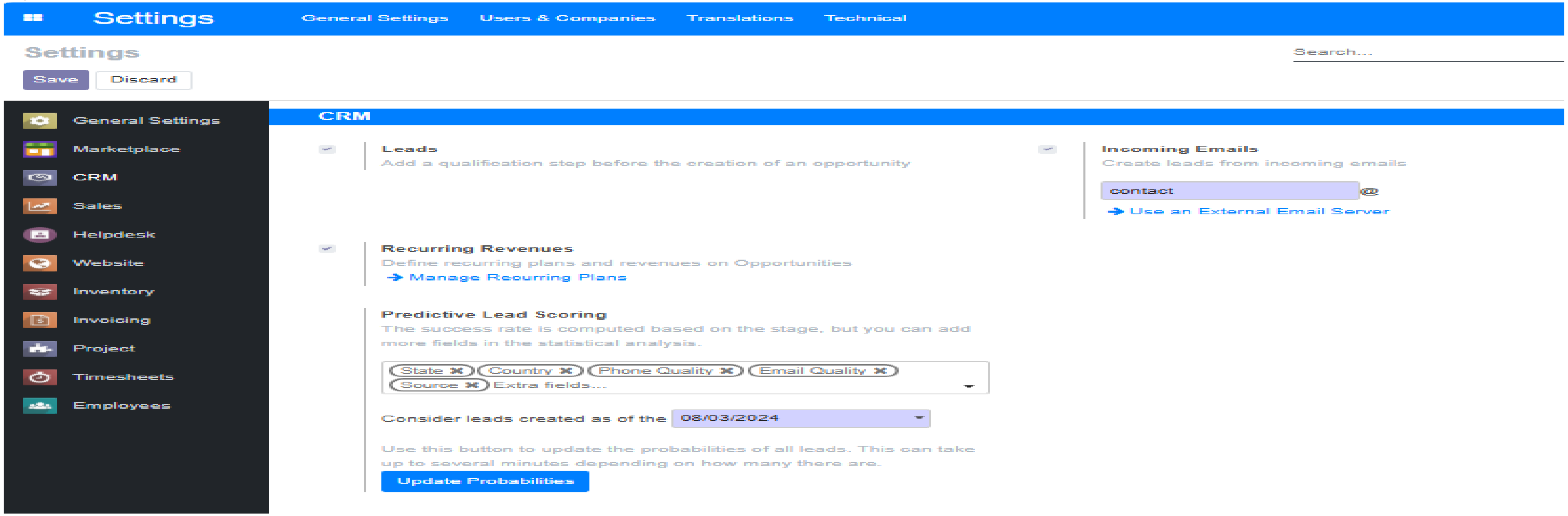
- Converts emails received in the user's Outlook inbox into internal leads for reference.
- These leads can be further transformed into opportunities by taking appropriate actions.

Lead Scoring

- Provides analytical insights into each opportunity available.
- Enables users to assess and prioritize leads based on their potential, improving decision-making and efficiency.

These features enhance the CRM's ability to streamline lead management and boost productivity.

Operations on Leads



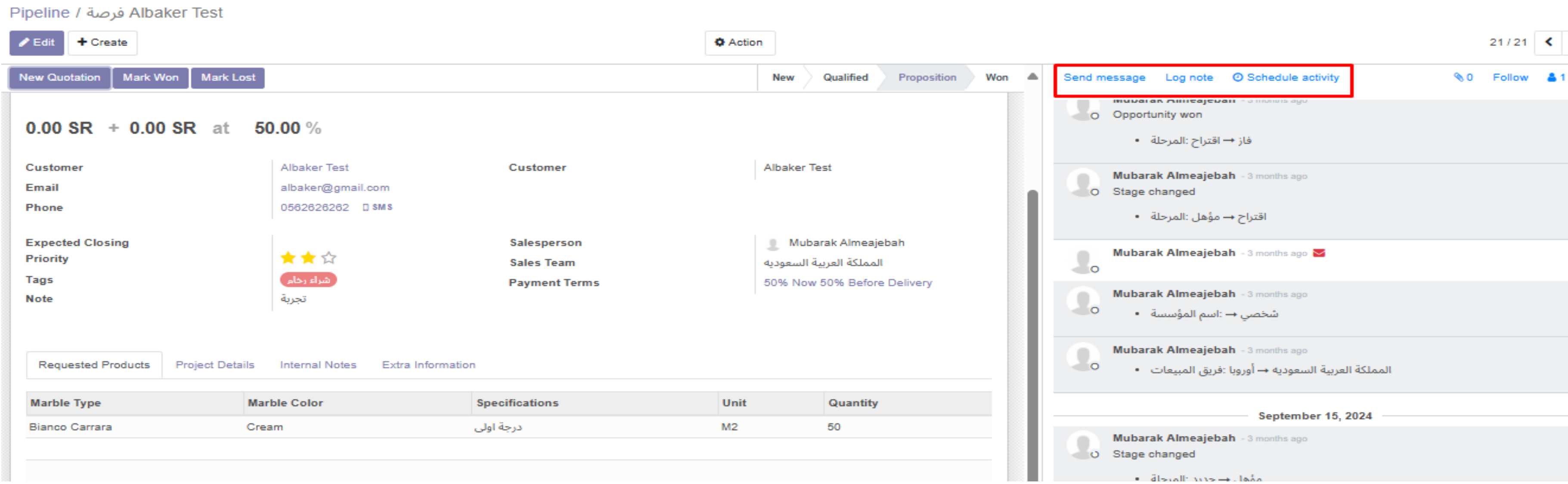
Riymar CRM offers users the flexibility to perform various operations on available leads, beyond just scheduling activities.

Key Features:

- **Comprehensive Lead Management:**
  Users can manage and operate on leads directly through the platform, ensuring actions align with both user needs and company operations.
- **Accessible Options:**
  All operational features can be accessed under each lead's description, providing a streamlined and user-friendly experience.

This functionality empowers users to take actionable steps on leads, enhancing overall efficiency and productivity.

Additional Features in Riymar CRM



Send Messages

- Users can send messages directly to leads from the lead menu.
- This feature ensures seamless communication with potential clients.

Log Notes

- Users can log detailed information about leads, including:
    - Descriptions of lead-related activities.
    - A record of operations performed on the lead.

Attachments

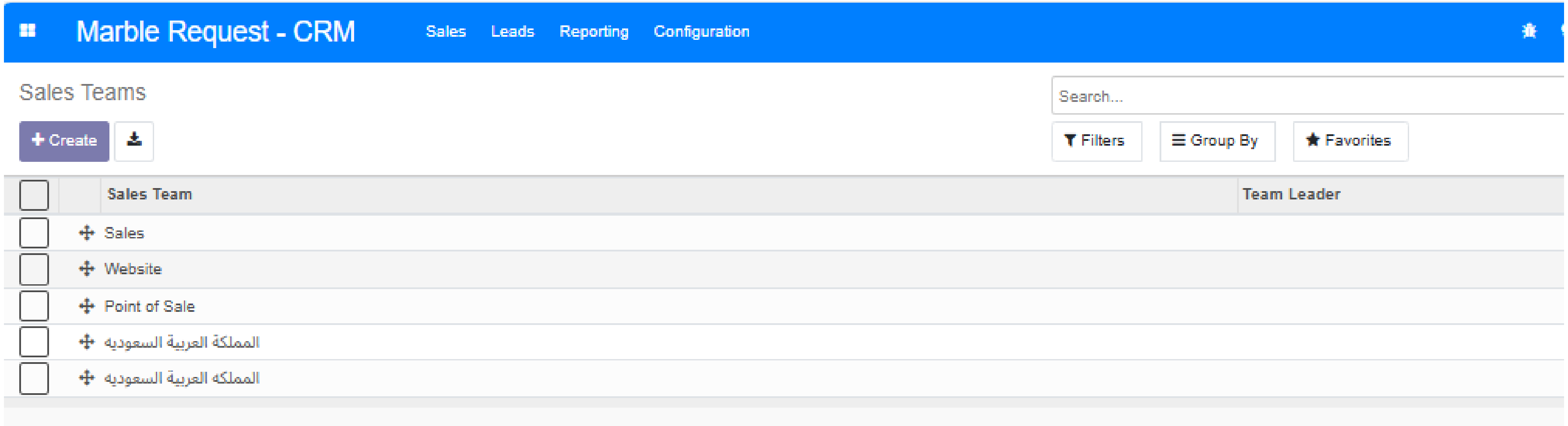
- Supports attaching various types of files to leads, including:
  - Documents.
  - Video files.
  - Other relevant materials.
- Ensures all essential information is consolidated within the lead profile.

Sales Team Management

- **Effective Management:**
  Riymar CRM allows businesses to control operations through the sales team. This enhances:
  - Product sales.
  - Lead generation.
  - Customer relations.
- **Sales Team Menu:**
  - Accessible via the **Configuration** section of the CRM module.
  - Offers filtering, grouping, and sorting options for efficient sales team searches.
  - Allows editing of team details by selecting the respective team.

These features ensure streamlined management of leads, communication, and sales team operations, fostering business growth.

Sales Team Creation in Riymar CRM

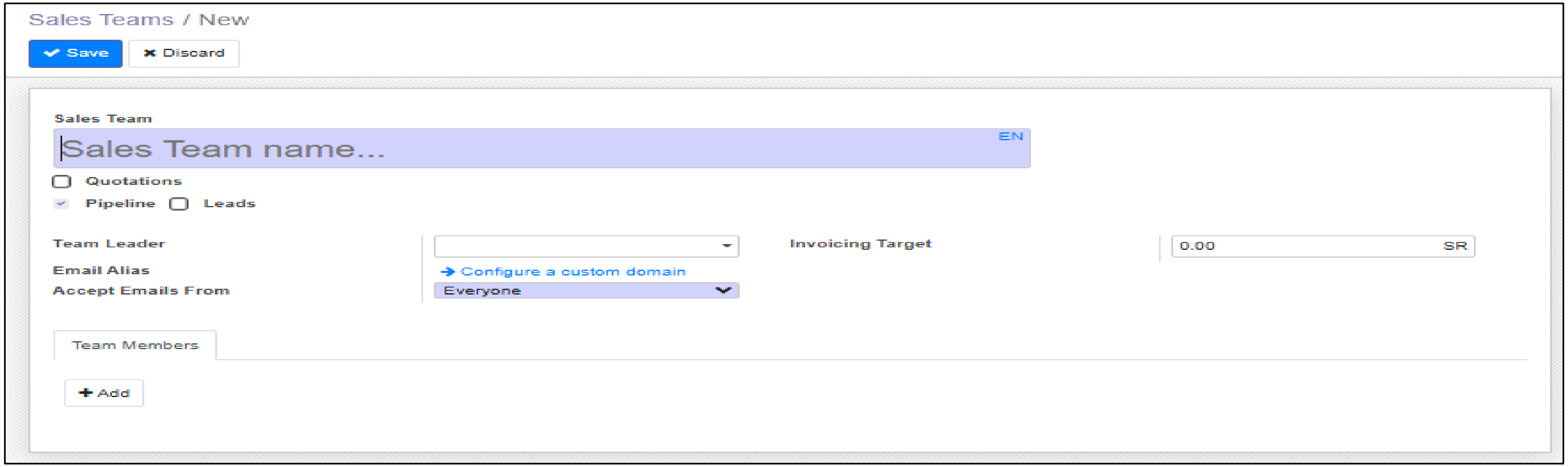


To create a new sales team, follow these steps:

1. **Select the Create Option:**
   Access the **Create** button in the sales team menu.
2. **Provide Team Details:**
   - **Team Name:** Assign a unique name to the sales team.
   - **Allocation:** Link the team to quotations, pipeline operations, and leads.
3. **Assign a Team Leader:**
   Choose a leader responsible for managing the team.
4. **Set Invoicing Targets (Optional):**
   If the company operates with sales targets, specify the invoicing target for the team.

This feature ensures flexibility and efficient organization of sales operations within Riymar CRM.

Adding Members to a Sales Team

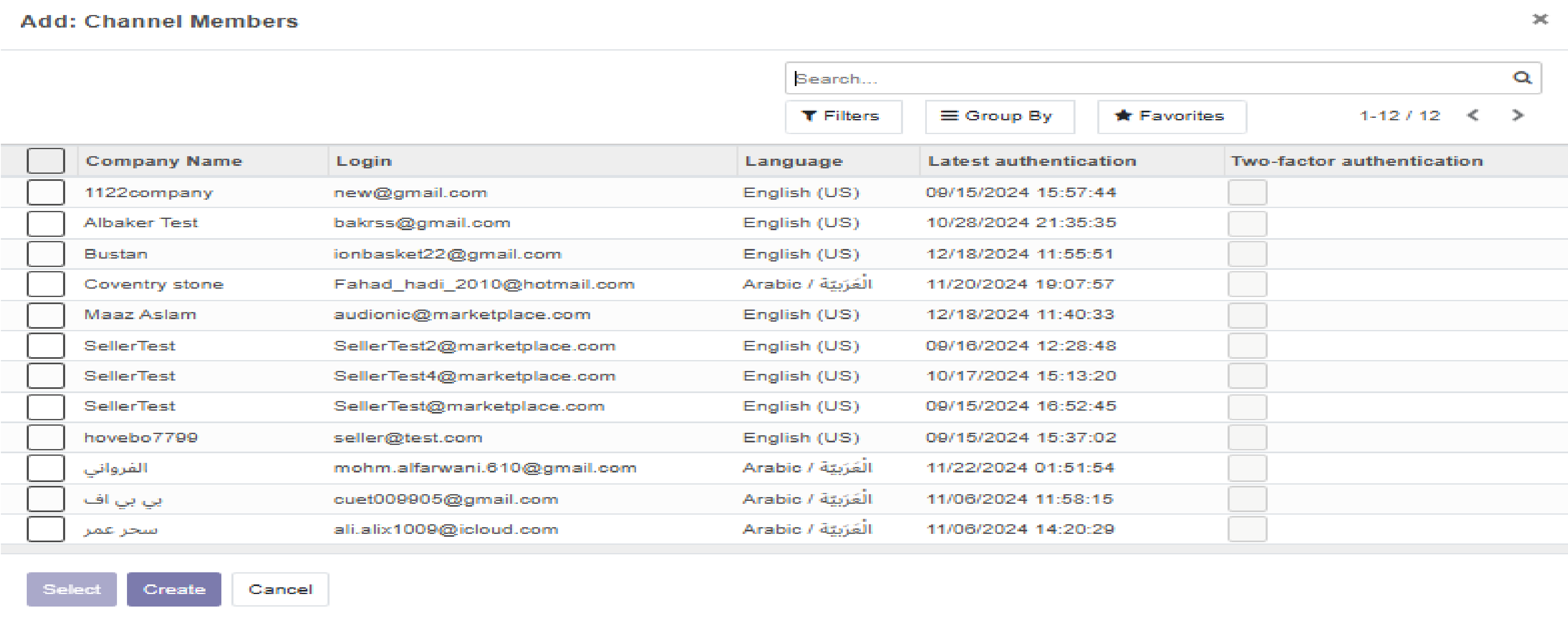


To add members to a sales team in Riymar CRM:

1. **Access the Team Member's Menu:**
   Navigate to the team member's menu under the desired sales team.
2. **Select the Add Option:**
   Click the **Add** button to open a pop-up window displaying a list of all employees with their contact information.
3. **Choose Existing Employees:**
   - Select employees from the listed contacts to add them to the team.
4. **Create a New Employee (Optional):**
   If the desired employee is not listed, use the **Create** option within the pop-up window to add a new employee.

This feature provides an easy and efficient way to manage team composition, ensuring all necessary personnel are included.

Managing Multiple Sales Teams in Riymar CRM



Add: Channel Members

Search...

Filters | Group By | Favorites | 1-12 / 12

	Company Name	Login	Language	Latest authentication	Two-factor authentication
	1122company	new@gmail.com	English (US)	09/15/2024 15:57:44	
	Albaker Test	bakrss@gmail.com	English (US)	10/28/2024 21:35:35	
	Bustan	ionbasket22@gmail.com	English (US)	12/18/2024 11:55:51	
	Coventry stone	Fahad_hadi_2010@hotmail.com	Arabic / الْعَرَبيّة	11/20/2024 19:07:57	
	Maaz Aslam	audionic@marketplace.com	English (US)	12/18/2024 11:40:33	
	SellerTest	SellerTest2@marketplace.com	English (US)	09/16/2024 12:28:48	
	SellerTest	SellerTest4@marketplace.com	English (US)	10/17/2024 15:13:20	
	SellerTest	SellerTest@marketplace.com	English (US)	09/15/2024 16:52:45	
	hovebo7799	seller@test.com	English (US)	09/15/2024 15:37:02	
	الفرواني	mohm.alfarwani.610@gmail.com	Arabic / الْعَرَبيّة	11/22/2024 01:51:54	
	بي بي اف	cuet009905@gmail.com	Arabic / الْعَرَبيّة	11/06/2024 11:58:15	
	سحر عمر	ali.alix1009@icloud.com	Arabic / الْعَرَبيّة	11/06/2024 14:20:29	

Select | Create | Cancel

Sales Team Management

- The Riymar platform enables users to efficiently manage, monitor, and control the operations of multiple sales teams.
- Sales teams can be allocated based on:
  - **Product:** Assign teams to specific product lines.
  - **Region of Operation:** Focus teams on particular geographical areas.
  - **Quantity of Sale:** Organize teams based on sales volume.

Reporting in Riymar CRM

Report Generation

- Riymar CRM provides powerful reporting tools to generate analytical reports.
- **Customization Options:**
  - Reports can be filtered, grouped, and sorted based on default or user-defined parameters.

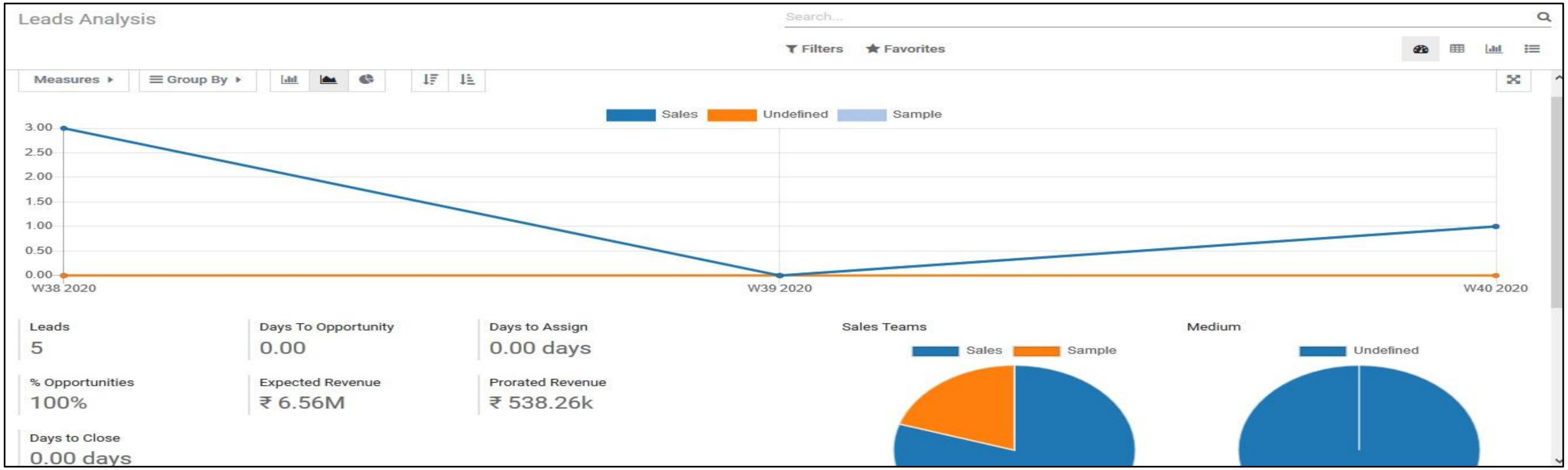
View Options

Reports can be displayed in:

- **Kanban View:** For a visual workflow.
- **Graphical View:** For insights through charts and graphs.
- **List View:** For detailed tabular data.

These features help users analyze performance, make informed decisions, and optimize operations.

Converting Leads into Opportunities in Riymar CRM



Pipeline-Based Operation

- Riymar CRM uses a pipeline-based approach, allowing users to manage leads and contacts systematically.
- Leads can be converted into opportunities directly from the lead window.

Conversion Process

- Leads are turned into opportunities upon agreement to the business terms and conditions with the customer.
- Parameters used for lead generation in Riymar also aid in seamlessly transitioning leads into opportunities.

Handling Opportunities

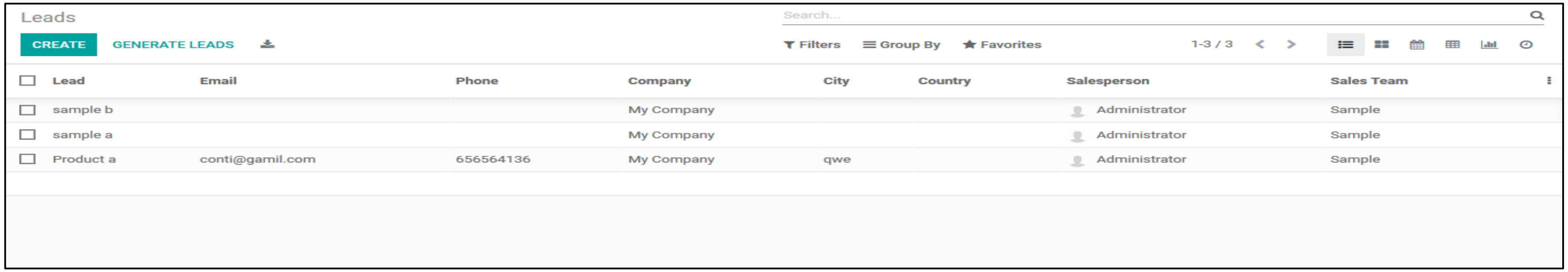
- Users can:
    - Mark opportunities as **lost leads** in case of business cancellation.
    - Revert opportunities back to **draft leads** if needed.

Accessing and Managing Leads

- **Lead Menu:**
    - Accessible from the CRM dashboard, displaying all company-assigned leads.
    - Allows users to edit individual leads by selecting them.
- **Filtering and Sorting:**
    - Offers robust filtering and sorting options similar to other windows in the platform.

This feature ensures efficient management of the lead-to-opportunity workflow while allowing flexibility to handle changes or cancellations.

Creating a Lead in Riymar CRM



Steps to Create a New Lead

Access the Lead Menu: .1
Navigate to the lead menu from the CRM dashboard.

Select the Create Option: .2
Click on the **Create** button to open the lead creation window.

Enter Lead Details: .3

Lead Description: Provide a brief description of the lead. ○

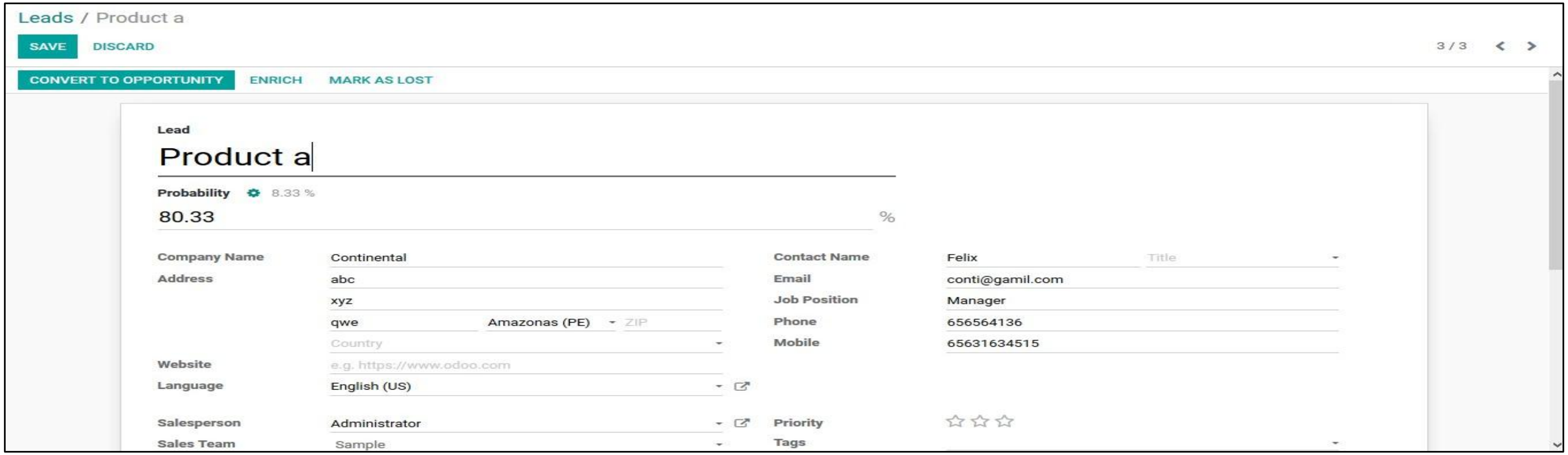
Probability: Specify the likelihood of acquiring the lead. ○

Company/Customer Name: Enter the name of the associated company or customer. ○

Contact Details: Add the contact information for the lead. ○

This streamlined process ensures accurate lead documentation and effective management.

Managing and Converting Leads in Riymar CRM



Lead Enrichment

- If limited contact information is available, users can select the **Enrich** option to enhance the lead with additional details.

Marking a Lead as Lost

- Leads that can no longer be converted into opportunities can be marked as **Lost**, ensuring proper tracking and record-keeping.

Converting a Lead to an Opportunity

1. **Initiating Conversion:**
   - Upon selecting the **Convert** option, a pop-up window will appear for describing the opportunity.
2. **Conversion Options:**
   - **Merge with Existing Opportunity:** Combine the lead with an already existing opportunity.
   - **Create a New Opportunity:** Generate a completely new opportunity for the lead.

3. **Additional Settings:**
   - Allocate a **Salesperson** and a **Sales Team** to the opportunity.
   - If creating a separate opportunity, users can link the lead to an existing customer for better tracking and alignment.

This flexible approach allows for efficient lead management and ensures seamless transitions into opportunities.