

CRM OdooV11

Features

CRM Module covers the following features :

- ✓ User Maintenance
- ✓ Master Data Management
- ✓ User Management
- ✓ Campaign Management
- ✓ Lead management
- ✓ Rules Engine Integration

This section includes the following functionalities :

- ✓ **User Creation** - Represents employee of the organization who perform the day-to-day activities using the CRM. The CRM features two types of users: Administrator, has access to register new users, assign applications, lock users etc.; and User, has limited access and can only use applications assigned by admin. It includes Users, Access Rights, Groups etc.
- ✓ **Role Creation** - Represents the hierarchical position of the individual users (employees) of your organization
- ✓ **Role Assignment & Role Dependencies** - Assigning roles to the users are reflected on Campaign & Team since role is dependent to each of the corresponding Campaign & Team

Master Data Management



Includes the following functionalities :

- ✓ **Product** - User needs to provide Product Name, Product Code, Manufacturer, Description etc. Product Name along with the Manufacturer are used to match with the rules engine product and manufacturer code for matching campaign id during automatic lead allocation process
- ✓ **Sub Product** - User has to provide Name, Sub Product code, Product, Special Offer, Description, Calculator etc.
- ✓ **Calculator** - Enables users to calculate amount on specific type of calculator (What to be calculated). User needs to provide Type of Calculator, Loan Amount, Interest Rate (%), Payment Periods (In months)
- ✓ **Disposition** - User needs to provide Name, Stage, Code, Description etc.
- ✓ **Sub Disposition** - . User has to provide Name, Code, Disposition, Description etc. User can check/ uncheck Next Stage, Back Stage etc. as per the requirement. Based on the Next Stage selection of the sub-disposition, during lead execution the lead will move to the next stage automatically based on this sub disposition
- ✓ **Question Template** - enables users to define the questionnaire template to be used for QA scoring. The questions will be defined first and then associated with the template

Master Data Management Screens

product

Product / New

SAVE DISCARD

Name

CC

Product Code F200 Description F200

Manufacturer F2 Active

Sub product

Sub Product / Car Loan

SAVE DISCARD

Name

Car Loan

Sub-Product Code CLN Active

Product Loan Description Calculator

Special Offer

Calculator

Calculator / Car loan

SAVE CREATE

Car loan

Loan Amount 120,000 Payment Period (in months) 240

Interest Rate (%) 9.80 Month Payment 1,064.28

Total Interest 135,428.24

Total MS Cost 255,428.24

CALCULATE

Disposition

Disposition / Connected

SAVE CREATE

Action

1/18

Name	Connected	Active	✓
Stage	TSP	Description	
Code	CONN		

Sub Disposition

Sub Disposition / Fix Appo

SAVE CREATE

Action

1/16

Name	Fix Appo	Active	✓
Code	FIA	Description	
Disposition	Connected	Back Stage	
Next Stage	✓		

Question Template

General Question / Income

SAVE CREATE

Action

1/4

Question No 1

Income

Active

✓

Templates

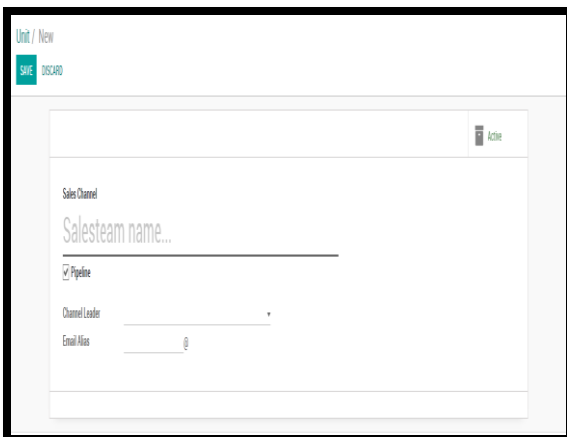
Template No	Template Name
1	Q1
2	Q2

User Management

Involves the following items :

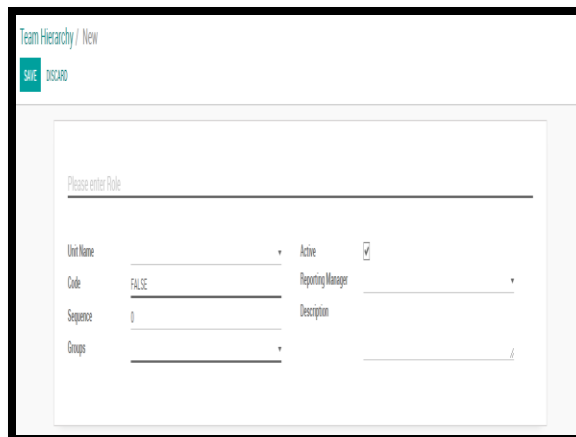
- ✓ **Unit** - User has to provide the Sales Channel (Team name), Channel Leader (Unit Head), Email Alias (If any)
- ✓ **Team Hierarchy** - Used to enable users to set up the team structure within the unit with its hierarchy based on the roles. User needs to provide the Role, Unit Name, Code, Groups, Active flag (By default checked), Reporting Manager, Description etc.
- ✓ **Assign Team** - Used to assign the team to the users and assigning an user to a valid role. Team can be associated with Organization/ Country/ Location/ Region

Unit



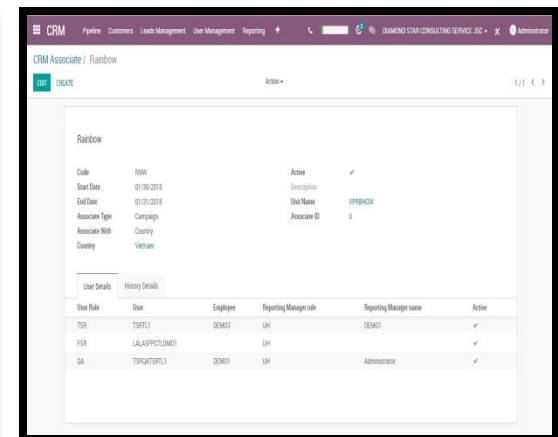
The screenshot shows the 'Unit / New' form. It includes a 'Sales Channel' section with a text input field labeled 'Salesteam name...'. Below this is a checkbox for 'Pipeline' which is checked. There are also input fields for 'Channel Leader' and 'Email Alias'.

Team Hierarchy



The screenshot shows the 'Team Hierarchy / New' form. It includes a 'Please enter Role' text input field. Below this are several input fields: 'Unit Name', 'Code' (set to FALSE), 'Sequence' (set to 0), and 'Groups'. There are also checkboxes for 'Active' (checked) and 'Reporting Manager', and a 'Description' text input field.

Assign Team



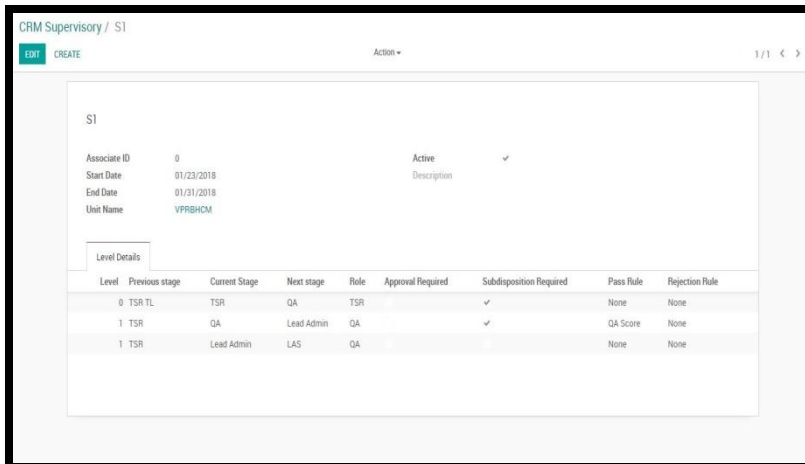
The screenshot shows the 'Assign Team' form. It includes a 'Rainbow' section with a table of user details. The table has columns for 'User Role', 'User', 'Employee', 'Reporting Manager role', 'Reporting Manager name', and 'Active'. Below this is a 'User Details' section with a table of user details. The table has columns for 'User Role', 'User', 'Employee', 'Reporting Manager role', 'Reporting Manager name', and 'Active'.

User Role	User	Employee	Reporting Manager role	Reporting Manager name	Active
TOR	TOR11	DEM01	LM	DEM01	✓
FSR	LAASPECT001	LM			✓
SA	TORQUART11	DEM01	LM	Administrator	✓

Campaign Management

Includes the following functionalities :

- ✓ **Campaign Workflow** - Defines the workflow for the stages and its movement across the stages also maps the Stage vs User matrix. Each stage of a campaign is defined and the business rules for changing the stage from previous to current stage and to next is defined post which screen(s) are mapped to stages with roles mapped to each stage
- ✓ **Campaign Design** – Assign user to leads using the Filter Leads and Filter Users option belonging to the team associated with the campaign. The upload button creates these new leads. Leads can be filtered from any table available within CRM based on the condition specified in the filter



CRM Supervisory / S1

EDIT CREATE Action 1/1 < >

S1

Associate ID 0 Active ✓

Start Date 01/23/2018 Description

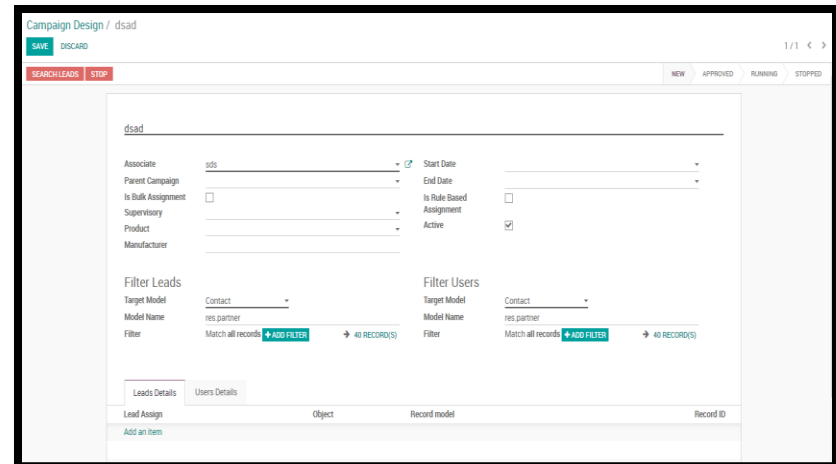
End Date 01/31/2018

Unit Name VPRBHCN

Level Details

Level	Previous stage	Current Stage	Next stage	Role	Approval Required	Subdisposition Required	Pass Rule	Rejection Rule
0	TSR TL	TSR	QA	TSR		✓	None	None
1	TSR	QA	Lead Admin	QA		✓	QA Score	None
1	TSR	Lead Admin	LAS	QA			None	None

Campaign Workflow



Campaign Design / dsad

SAVE DISCARD 1/1 < >

SEARCH LEADS STOP NEW APPROVED RUNNING STOPPED

dsad

Associate info Start Date

Parent Campaign End Date

In Bulk Assignment ☐ In Rule Based Assignment ☐

Supervisory Active ☒

Product

Manufacturer

Filter Leads

Target Model Contact

Model Name res partner

Filter Match all records **ADD FILTER** → 40 RECORD(S)

Filter Users

Target Model Contact

Model Name res partner

Filter Match all records **ADD FILTER** → 40 RECORD(S)

Leads Details Users Details

Lead Assign Object Record model Record ID

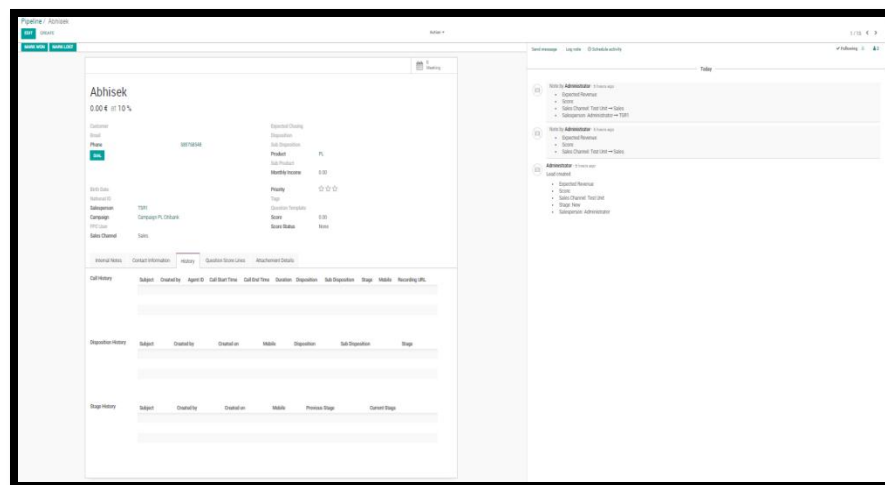
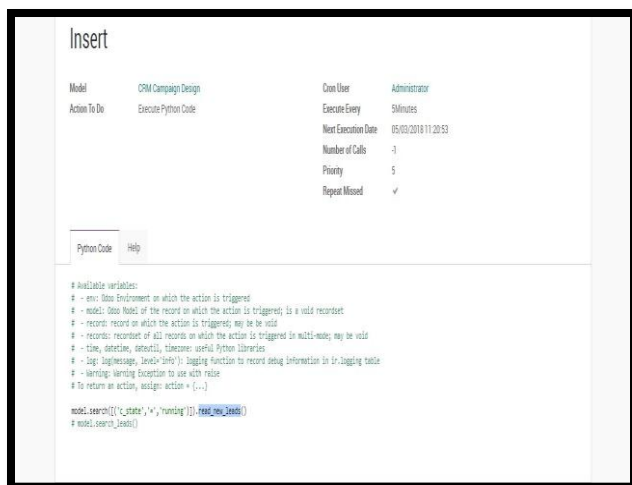
Add an item

Campaign Design

Lead Management

Any valid User logging in to the system having leads assigned to him/her can view the leads for the execution , includes the following feature :

- ✓ **Lead Assign** - New leads are created in New Lead DB from DWH or MDM (currently not integrated). New Lead Data is manually populated to initiate the process
- ✓ An automatic job runs after every 5 minutes to check for new leads
- ✓ If the product & manufacturer are mentioned for the new leads then they are automatically inserted into the corresponding campaign defined for the product & manufacturer combination based on the rules setup for the campaigns
- ✓ If the product & manufacturer are not defined for the new leads then product & manufacturer are picked from rules defined and subsequently assigned to the campaign with the new stage
- ✓ Once the leads are assigned to the campaigns are equidistributed among the team associated with the campaign



Rules Engine Integration

As per rules definition the lead selected in red line above will be analysed against a set of rules as Product and Manufacturer for the lead has not been specified. The leads income is within range of 6 M per month therefore he will be eligible for Rule FE Credit Card, Rule FE PL, Rule HI BaoViet, Rule Endowment ML as can be seen in the income column for the Rules

dmcCampaignRules	Income(in Millions)	CheckEmpanelledStatus	FEPremiumEmpanelledStatus	Set Product
Rule FE Credit Card	0,8	FALSE		'CC','FE'
Rule VPB Credit Card	8,15	FALSE		'CC','VPB'
Rule Citibank Credit Card	15,	FALSE		'CC','Citibank'
Rule Dr Dong PL	0,3	TRUE	'(PREMIUM','REGULAR)'	'PL','Dr Dong'
Rule FE PL	3,8	TRUE	'(PREMIUM','REGULAR)'	'PL','FE'
Rule VPB PL	8,18	FALSE		'PL','VPB'
Rule Citibank PL	18,	FALSE		'PL','Citibank'
Rule HI PhuHung PTI	0,5	FALSE		'HI','PhuHung','PTI'
Rule HI BaoViet	5,10	FALSE		'HI','Bao Viet'
Rule LibertyBioViet	10,20	FALSE		'HI','Liberty','Bao Viet'
Rule Liberty	,20	FALSE		'HI','Liberty'
Rule Term Life from ML	,5	FALSE		'TermLife','ML'
Rule Endowment from ML	5,20	FALSE		'Endowment','ML'
Rule Universal Life	,20	FALSE		'Life','Universal'

THANK YOU