



## 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

## Riyamar CRM Workflow

The Riyamar 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 Riyamar 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 Rymar 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.
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## Activities in CRM

The Rymar 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.

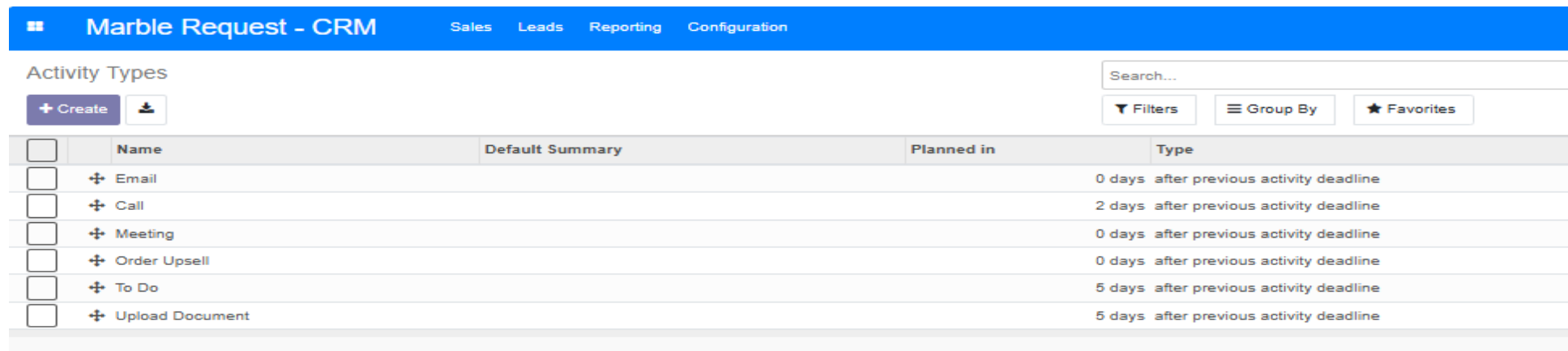
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## Summary

The Rymar 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



<input type="checkbox"/>	Name	Default Summary	Planned in	Type
<input type="checkbox"/>	+ Email			0 days after previous activity deadline
<input type="checkbox"/>	+ Call			2 days after previous activity deadline
<input type="checkbox"/>	+ Meeting			0 days after previous activity deadline
<input type="checkbox"/>	+ Order Upsell			0 days after previous activity deadline
<input type="checkbox"/>	+ To Do			5 days after previous activity deadline
<input type="checkbox"/>	+ Upload Document			5 days after previous activity deadline

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 Types / New

Save Discard

Name

EN

Action to Perform: None

Default User

Model: Lead/Opportunity

Default Summary

Icon

Decoration Type

Trigger Next Activity

Default Next Activity

Recommended Next Activities

Email templates

Scheduled Date

after previous activity deadline

Default Description

- **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

### Schedule Activity

<b>Activity Type</b>	Call	<b>Due Date</b>	10/01/2020
<b>Summary</b>	e.g. Discuss proposal	<b>Assigned to</b>	Administrator

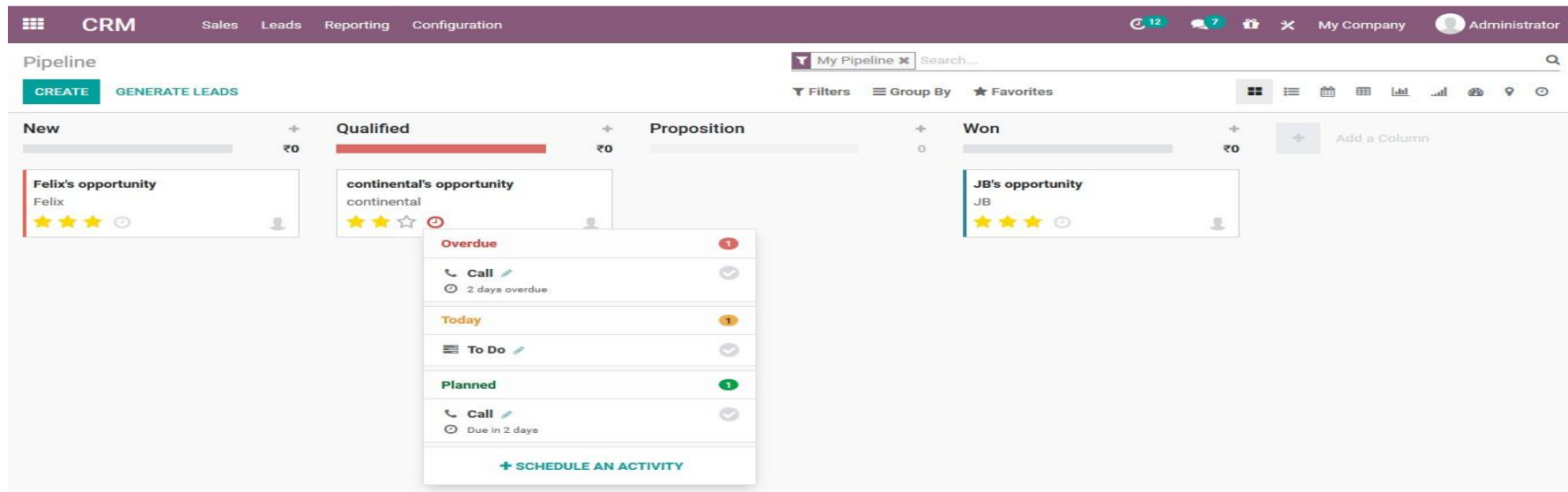
Sample

**SCHEDULE**   MARK AS DONE   DONE & SCHEDULE NEXT   DISCARD

- **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



The screenshot displays a CRM dashboard with a purple header bar containing navigation links for Sales, Leads, Reporting, and Configuration. The main area shows a sales pipeline with four stages: New, Qualified, Proposition, and Won. Each stage has a value of ₹0. A lead named 'continental's opportunity' is highlighted in the Qualified stage, and a task list is open over it. The task list includes: Overdue (2 days overdue), Today (1 To Do), and Planned (1 Call due in 2 days). A '+ SCHEDULE AN ACTIVITY' button is at the bottom of the task list.

- **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.





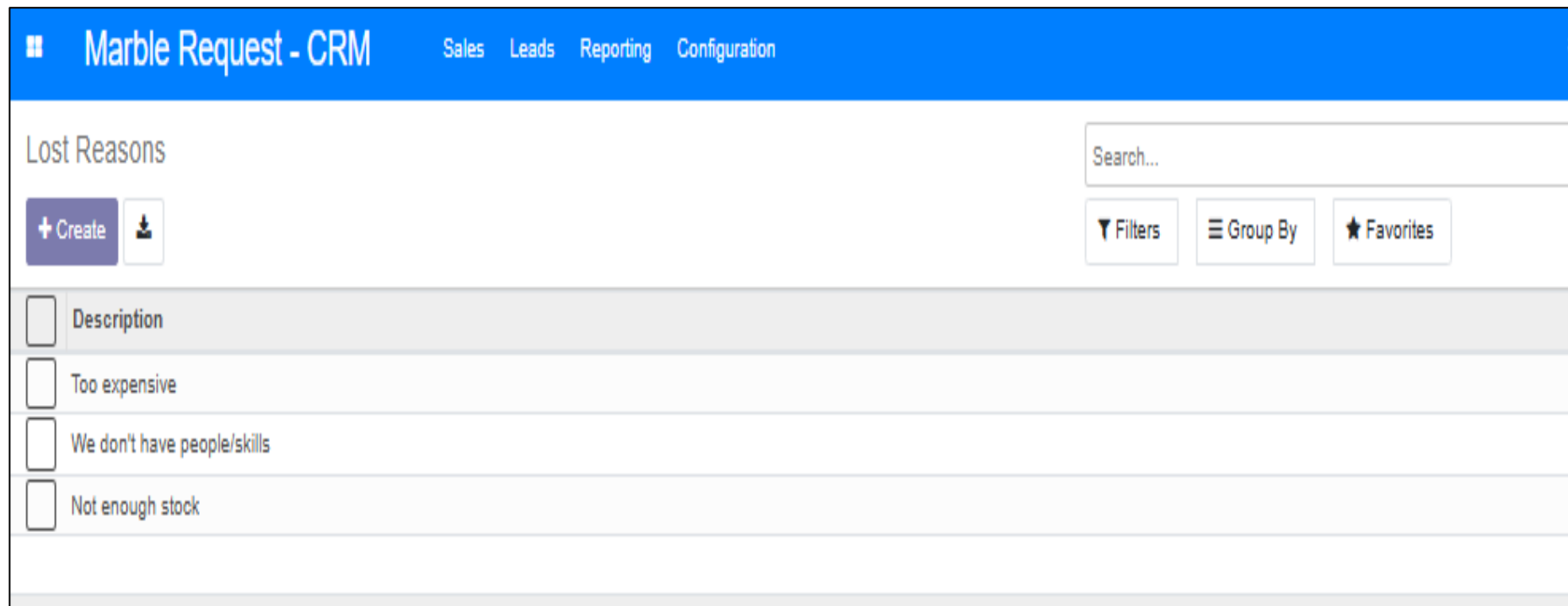
## Managing Lost Opportunities

The screenshot displays the 'Marble Request - CRM' interface. The top navigation bar includes 'Sales', 'Leads', 'Reporting', and 'Configuration'. The main area is titled 'Pipeline' and features a search bar, 'Filters', 'Group By', and 'Favorites' options. The pipeline is divided into four stages: 'New', 'Qualified', 'Proposition', and 'Won'. The 'New' stage is currently active, showing a form for creating a new opportunity. The form includes fields for 'Organization / Contact', 'Opportunity' (with an example 'e.g. Product Pricing'), 'Email', 'Phone', and 'Expected Revenue' (with a value of 0.00 and a unit of SR). There are also three star icons for rating and a dropdown menu for 'E.g. Monthly'. The 'Proposition' stage shows a card for 'فرصة Albaker Test' (Albaker Test Opportunity) with a star rating and a user icon.

- **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



The screenshot displays the 'Marble Request - CRM' interface. The top navigation bar is blue and contains the title 'Marble Request - CRM' and menu items: 'Sales', 'Leads', 'Reporting', and 'Configuration'. Below the navigation bar, the 'Lost Reasons' section is visible. It includes a search bar with the placeholder text 'Search...'. Below the search bar are three buttons: 'Filters', 'Group By', and 'Favorites'. On the left side of the 'Lost Reasons' section, there are two buttons: '+ Create' and a download icon. Below these buttons is a table with four rows, each representing a lost reason. Each row has a checkbox on the left and a text description on the right.

<input type="checkbox"/>	Description
<input type="checkbox"/>	Too expensive
<input type="checkbox"/>	We don't have people/skills
<input type="checkbox"/>	Not enough stock

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

The screenshot displays the CRM interface for a lead named "emadambusaijdi@gmail.com". The top navigation bar includes "Sales", "Leads", "Reporting", and "Configuration". The main header shows the pipeline "emadambusaijdi@gmail.com" with buttons for "Edit", "Create", and "Action". Below this, there are tabs for "New Quotation", "Mark Won", and "Mark Lost", and a status bar with "New", "Qualified", "Proposition", and "Won". The lead's name and ID "INQ027" are prominently displayed, along with a progress indicator "0.00 SR + 0.00 SR at 50.00 %". The lead's contact information, including email and phone, is shown. The interface also features a table of requested products.

Marble Type	Marble Color	Specifications	Unit	Quantity
Thassos	Grey	TestTest	M2	5

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

The screenshot displays the 'Marble Request - CRM' interface. A modal dialog titled 'Lost Reason' is open, allowing a user to specify why an opportunity was lost. The dialog includes a dropdown menu for 'Lost Reason' (currently set to 'Too expensive'), a text area for 'Brief Note', and 'Submit' and 'Cancel' buttons. The background shows a CRM pipeline view for 'emadambusaijdi@gmail.com' with buttons for 'Edit', 'Create', 'New Quotation', 'Mark Won', and 'Mark Lost'.

- **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

The screenshot displays a CRM interface for viewing a lost opportunity. At the top, it shows the pipeline for 'emadambusaijdi@gmail.com' with buttons for 'Edit', '+ Create', and 'Action'. Below this, there are buttons for 'Mark Won', 'Mark Lost', and 'Restore'. The main content area shows the opportunity details for 'emadambusaijdi@gmail.com' with the ID 'INQ027' and a value of '0.00 SR + 0.00 SR at 0.00 %'. A red banner with the word 'LOST' is overlaid on the top right. The details are organized into two columns: the left column includes 'Customer' (Test, emadambusaijdi@gmail.com, 91993957), 'Expected Closing Priority' (3 stars), 'Tags', 'Note', and 'Lost Reason' (Too expensive); the right column includes 'Customer' (Test), 'Salesperson' (Test), 'Sales Team' (Sales), and 'Payment Terms' (45 Days). At the top right of the main area, there are indicators for '0 Meeting' and '1 Quotations'.

- **Filter Lost Opportunities:**

Lost opportunities can be easily viewed by applying filters in the dashboard.

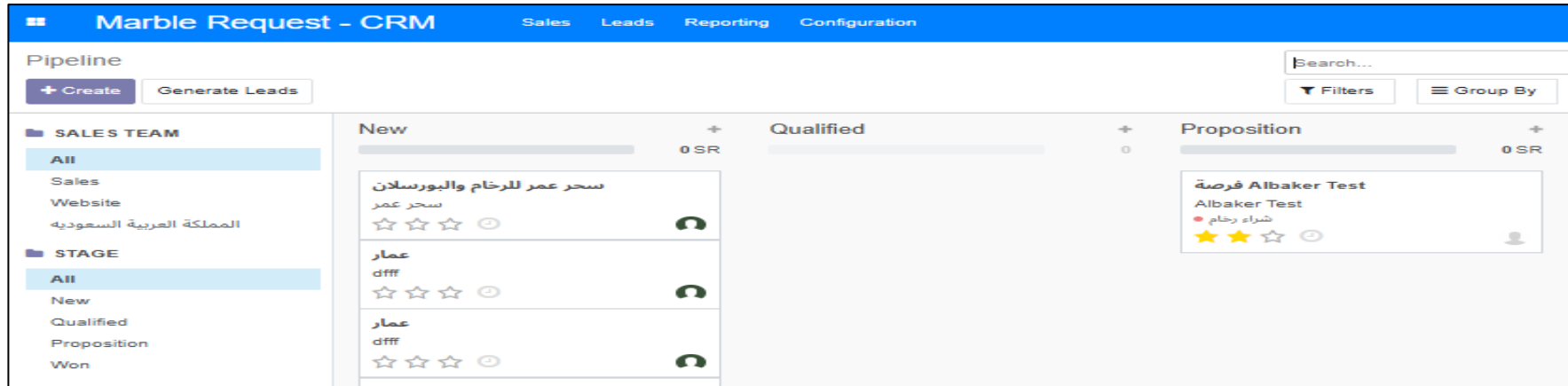
- **Specific Filtering Options:**

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 Acquisition in Rymar CRM



### Simplified Lead Recruitment

- Rymar 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

- Rymar 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

The screenshot shows the 'Settings' page in Riymar CRM. The top navigation bar includes 'General Settings', 'Users & Companies', 'Translations', and 'Technical'. The main content area is titled 'Settings' and has a search bar. Below the search bar are 'Save' and 'Discard' buttons. A left sidebar lists various settings categories: General Settings, Marketplace, CRM, Sales, Helpdesk, Website, Inventory, Invoicing, Project, Timesheets, and Employees. The main content area is divided into sections. The first section is 'Predictive Lead Scoring', which includes a description, a list of selected fields (State, Country, Phone Quality, Email Quality, Source), a date selector for 'Consider leads created as of the' (08/03/2024), and an 'Update Probabilities' button. The second section is 'Lead Generation', which contains four sub-sections: 'Visits to Leads' (unchecked), 'Lead Mining' (checked), 'Lead Enrichment' (checked), and 'Outlook CRM Extension' (unchecked). Each sub-section has a brief description and a 'Buy credits' link.

**Settings** | General Settings | Users & Companies | Translations | Technical

Settings | Search...

Save | Discard

**Predictive Lead Scoring**  
The success rate is computed based on the stage, but you can add more fields in the statistical analysis.

State X Country X Phone Quality X Email Quality X  
Source X Extra fields...

Consider leads created as of the 08/03/2024

Use this button to update the probabilities of all leads. This can take up to several minutes depending on how many there are.

Update Probabilities

**Lead Generation**

**Visits to Leads**  
Convert visitors of your website into leads and perform data enrichment based on their IP address

**Lead Mining** ?  
Generate new leads based on their country, industry, size, etc.  
Buy credits

**Lead Enrichment**  
Enrich your leads automatically with company data based on their email address

Enrich leads on demand only  
 Enrich all leads automatically

Buy credits

**Outlook CRM Extension** ?  
Turn emails received in your Outlook mailbox into leads and log their content as internal notes.

### 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.

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## Operations on Leads

The screenshot shows the 'Settings' page in Riymar CRM, specifically the 'CRM' section. The page features a blue header with the title 'Settings' and navigation links for 'General Settings', 'Users & Companies', 'Translations', and 'Technical'. Below the header, there are 'Save' and 'Discard' buttons. A dark sidebar on the left lists various settings categories: General Settings, Marketplace, CRM, Sales, Helpdesk, Website, Inventory, Invoicing, Project, Timesheets, and Employees. The main content area is titled 'CRM' and contains three sections: 'Leads' (with a checkbox and description), 'Recurring Revenues' (with a checkbox and description), and 'Predictive Lead Scoring' (with a description and a list of fields: State, Country, Phone Quality, Email Quality, Source, and Extra fields...). There is also a date selector for 'Consider leads created as of the' set to '08/03/2024' and an 'Update Probabilities' button.

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

Pipeline / فرصة Albaker Test

[Edit](#) [+ Create](#) [Action](#) 21 / 21

[New Quotation](#) [Mark Won](#) [Mark Lost](#) [New](#) [Qualified](#) [Proposition](#) [Won](#) [Send message](#) [Log note](#) [Schedule activity](#) [Follow](#) [1](#)

**0.00 SR + 0.00 SR at 50.00 %**

<b>Customer</b>	Albaker Test	<b>Customer</b>	Albaker Test
<b>Email</b>	albaker@gmail.com		
<b>Phone</b>	0562626262 <a href="#">SMS</a>		
<b>Expected Closing</b>		<b>Salesperson</b>	Mubarak Almejebah
<b>Priority</b>	☆☆☆	<b>Sales Team</b>	المملكة العربية السعودية
<b>Tags</b>	شراء حجار	<b>Payment Terms</b>	50% Now 50% Before Delivery
<b>Note</b>	تجربة		

[Requested Products](#) [Project Details](#) [Internal Notes](#) [Extra Information](#)

Marble Type	Marble Color	Specifications	Unit	Quantity
Bianco Carrara	Cream	درجة أولى	M2	50

September 15, 2024

Mubarak Almejebah - 3 months ago  
Opportunity won  
• فاز → اقتراح المرحلة:

Mubarak Almejebah - 3 months ago  
Stage changed  
• اقتراح → مؤهل المرحلة:

Mubarak Almejebah - 3 months ago  
• شخصي → اسم المؤسسة:

Mubarak Almejebah - 3 months ago  
• المملكة العربية السعودية → أوروبا: فريق المبيعات:

Mubarak Almejebah - 3 months ago  
Stage changed  
• مؤهل → حزين المرحلة:

### 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.
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## Sales Team Management

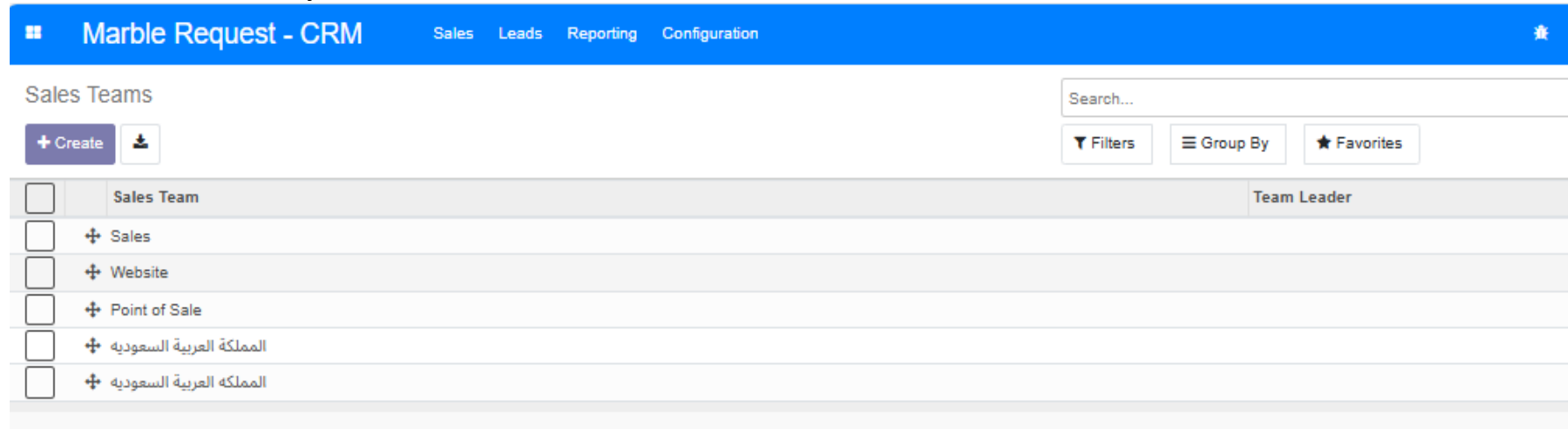
- **Effective Management:**  
Riyamar CRM allows businesses to control operations through the sales team. This enhances:
  - Product sales.
  - Lead generation.
  - Customer relations.
- **Sales Team Menu:**
  - Accessible via the **Configuration** section of the CRM module.
  - Offers filtering, grouping, 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.

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## Sales Team Creation in Riymar CRM



The screenshot shows the 'Sales Teams' management interface in Riymar CRM. At the top, there's a blue navigation bar with the title 'Marble Request - CRM' and menu items for 'Sales', 'Leads', 'Reporting', and 'Configuration'. Below this, the 'Sales Teams' section features a '+ Create' button and a search bar. A table lists existing sales teams with columns for selection, name, and team leader.

<input type="checkbox"/>	Sales Team	Team Leader
<input type="checkbox"/>	+ Sales	
<input type="checkbox"/>	+ Website	
<input type="checkbox"/>	+ Point of Sale	
<input type="checkbox"/>	+ المملكة العربية السعودية	
<input type="checkbox"/>	+ المملكة العربية السعودية	

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:**
  - o **Team Name:** Assign a unique name to the sales team.
  - o **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

The screenshot shows the 'Sales Teams / New' form. At the top, there are 'Save' and 'Discard' buttons. The main form area is titled 'Sales Team' and contains a text input field for the team name, followed by checkboxes for 'Quotations', 'Pipeline', and 'Leads'. Below these are fields for 'Team Leader', 'Invoicing Target', 'Email Alias', and 'Accept Emails From'. A 'Team Members' section is visible at the bottom with an '+ Add' button.

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

Q

Filters Group By ★ Favorites 1-12 / 12 < >

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

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 Rymar CRM

### Report Generation

- Rymar 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.

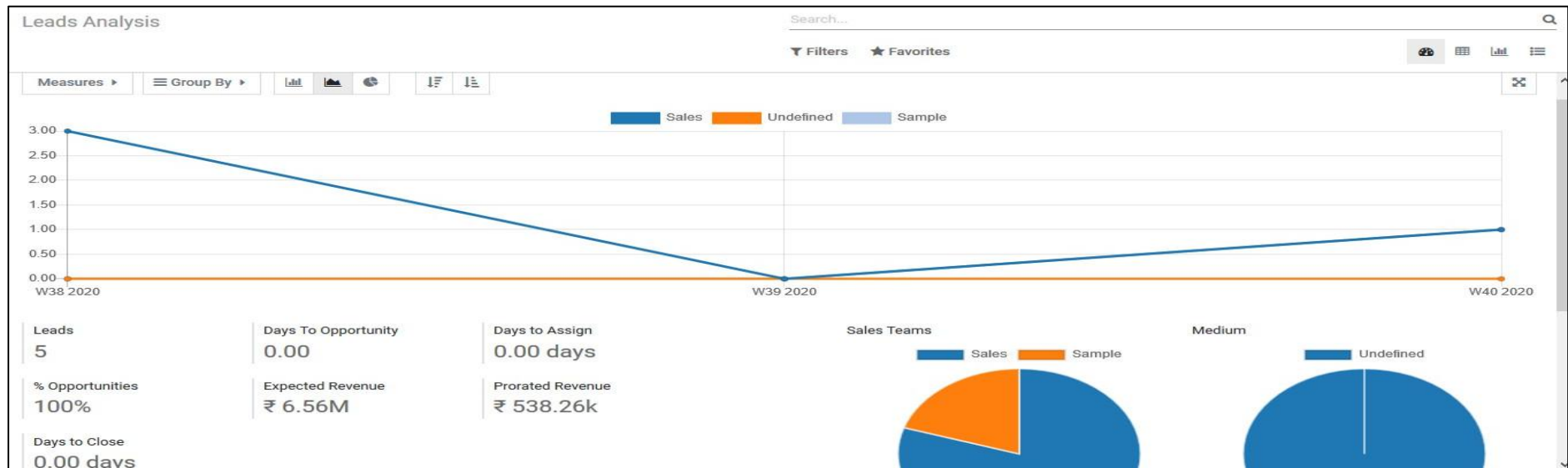
### View Options

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 Rymar 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.

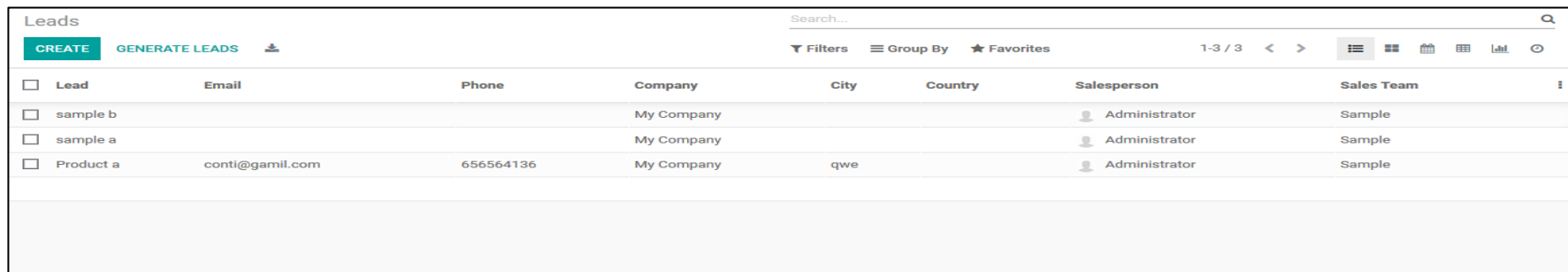
This feature ensures efficient management of the lead-to-opportunity workflow while allowing flexibility to handle changes or cancellations.

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## Creating a Lead in Riymar CRM



Lead	Email	Phone	Company	City	Country	Salesperson	Sales Team
<input type="checkbox"/>	sample b		My Company			Administrator	Sample
<input type="checkbox"/>	sample a		My Company			Administrator	Sample
<input type="checkbox"/>	Product a	contl@gamil.com	656564136	My Company	qwe	Administrator	Sample

### 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 Rymar CRM

Leads / Product a

SAVE DISCARD 3 / 3 < >

CONVERT TO OPPORTUNITY ENRICH MARK AS LOST

Lead

Product a

Probability 8.33 %

80.33 %

Company Name	Continental	Contact Name	Felix	Title	-
Address	abc	Email	conti@gamil.com		
	xyz	Job Position	Manager		
	qwe Amazonas (PE) ZIP	Phone	656564136		
	Country	Mobile	65631634515		
Website	e.g. https://www.odoo.com				
Language	English (US)				
Salesperson	Administrator	Priority	☆☆☆		
Sales Team	Sample	Tags			

### 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.


#### Convert to opportunity ✕

**Conversion Action**

Convert to opportunity

Merge with existing opportunities

**Assign this opportunity to**

**Salesperson** Administrator ▼ 

**Sales Team** Sample ▼

**Opportunities**

Created on	Opportunity	Type	Contact Name	Email	Stage	Salesperson	Sales Team	
09/17/2020	continental's opportunity	Opportunity	continental	conti@gmail.com	Qualified	Administrator	Sales	✕
09/29/2020	Product a	Lead	Felix	conti@gamil.com	New	Administrator	Sample	✕

[Add a line](#)

**CREATE OPPORTUNITY** **CANCEL**

