

CRM

Sales Accounts Activities Support Collaboration



تواتر النظم

# CRM DATA BANK

Contact

Sales@tawatur.-it.co  
m

011 416 40 10

966 50 777 6675

# SALES OPPORTUNITIES & LEADS



HOME OPPORTUNITIES SALES ACCOUNTS ACTIVITIES SUPPORT COLLABORATION ALL

CREATE ▾



+ Create Opportunity



CREATE

SAVE

CANCEL

SAVE AND CONTINUE

👁 View Opportunities

⬇ Import Opportunities

Recently Viewed

BASIC

Details

Additional Info

Info

Last Action

No:

Opportunity Name: \*

Priority:

High

Industry:

Sales Stage: \*

Prospecting

Next Step:

Offer#:

Opportunity Amount: \*

Department: \*

Description:

Probability (%):

10

Account Name: \*

Related to:

Customer

Contact Name:

Assigned to:

Telephone:

Email:

Address:

Lead Source:

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# CUSTOMER PROFILE



CUSTOMERS SALES ACCOUNTS ACTIVITIES SUPPORT COLLABORATION ALL

CREATE ▾



Any Email

Any Address

City

State

Postal Code

Country

Type

Analyst  
Competitor  
Customer  
Integrator  
Investor

Industry

Noria ERP  
Mobile  
Mobile Sales  
Mobile Services  
Venda/Dynamic POS

Assigned to

Abd EL Afou Anouti  
AbedALSALAM Zaaroura  
Adaher Adaher  
Admin Admin  
Ahmad Hasan  
Amin Itani

▼ LAYOUT OPTIONS

Save filter as:

SAVE

LBL\_MODIFY\_CURRENT\_SEARCH:

UPDATE

DELETE

SEARCH

CLEAR

--None--

Name ▾

Name ▾

Phone ▾

McVdate ▾

McStatus ▾

ACTIONBULK ACTION ▾



M/S International  
FAB

M/S International  
M/S FAB

28/03/2018  
27/03/2018

Under Maintenance

# DOCUMENT MANAGEMENT



DOCUMENTS SALES ACCOUNTS ACTIVITIES SUPPORT COLLABORATION ALL

CREATE ▼

Search...



+ Create Document

View Documents

Recently Viewed

CREATE

SAVE

CANCEL

SAVE AND CONTINUE

OVERVIEW

File Name: \*

Browse...

No file selected.

Status:

Active

Document Name: \*

Revision: \*

1

Document Type:

Publish Date: \*

12/04/2017



Template?:

☐

Expiration Date:



Category:

Sub Category:

Description:

Related Document:

SELECT

Related Document Revision:

Assigned to:



SAVE

CANCEL

SAVE AND CONTINUE



# NOTES



HOME NOTES SALES ACCOUNTS ACTIVITIES SUPPORT COLLABORATION ALL

CREATE ▼

Search...



Create Note or Attachment



View Notes



Import Notes



CREATE

SAVE

CANCEL

SAVE AND CONTINUE

## OVERVIEW

Contact:



Related To:

Customer ▼



Subject: \*

Attachment:

Browse...

No file selected.

Note:

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[illegible]

# WORKFLOW



WORKFLOW SALES ACCOUNTS ACTIVITIES SUPPORT COLLABORATION ALL

CREATE

Search...



+ Create WorkFlow

View WorkFlow

View Process Audit

CREATE

SAVE

CANCEL

SAVE AND CONTINUE

BASIC

Name: \*

Assigned to:



WorkFlow Module: \*

Status:

Run:

Run On: \*

Repeated Runs:

☐

Description:

Conditions

Conditions:

ADD CONDITION

Actions

Actions:

ADD ACTION

# TASKS OPERATIONS



HOME TASKS SALES ACCOUNTS ACTIVITIES SUPPORT COLLABORATION ALL

CREATE ▼



+ Create Task

View Tasks

Import Tasks

CREATE

SAVE

CANCEL

SAVE AND CONTINUE

TASK OVERVIEW

Details

Maint. Contract

Information

Start Date: \*

05/04/2017 09 : 00 am  
dd/mm/yyyy 11:00pm

type: \*

Call

Sub:

Edm Office

Subject: \*

Client: \*

Related to: \*

Customer

Assigned to:

Generate Task to Case:

☐

Contracts:

Due Date:

05/04/2017 09 : 00 am  
dd/mm/yyyy 11:00pm

Status: \*

Completed

Fees:

Priority: \*

High

Duration/Hours: \*

Contact Name:

Department:

Reference #: \*

SAVE

CANCEL

SAVE AND CONTINUE



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# QUOTES



QUOTES SALES ACCOUNTS ACTIVITIES SUPPORT COLLABORATION ALL

CREATE ▼

Search



Create Quote



Address Information



View Quotes



Import



Import Line Items

Account:



Contact:



## Billing Address

Street:

City:

State:

Postal Code:

Country:

## Shipping Address

Street:

City:

State:

Postal Code:

Country:

Copy address from left:

☐

## Line Items

Currency:

Line Items:

ADD GROUP

Total:

Discount:

Subtotal:

Shipping:

Shipping Tax:

# PROJECTS



PROJECTS SALES ACCOUNTS ACTIVITIES SUPPORT COLLABORATION ALL

CREATE ▼

Search...



+ Create Project

View Project List

Resource Calendar

View Project Tasks

CREATE

SAVE

CANCEL

Project Overview

Project Details

Other

Name: \*

Consider Working days:

☐

Start Date: \*



Priority:

High ▼

Status:

Draft ▼

Project Manager:



End Date: \*



Relate to Customer: \*



## Resource List

Mohammad Msallam

rem

## Add Resource

First Name:

Last Name:

Email:

SEARCH

## Create an Resource

As Contact

SAVE

CANCEL

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# CALENDAR



CALENDAR

SALES

ACCOUNTS

ACTIVITIES

SUPPORT

COLLABORATION

ALL

CREATE



Schedule Meeting



Schedule Call



Create Task



Today

## CALENDAR

DAY

WEEK

MONTH

SHARED MONTH

SHARED WEEK



SETTINGS



2 April 2017 - 8 April 2017



Mohammad Msallam

	Sunday 2	Monday 3	Tuesday 4	Wednesday 5	Thursday 6	Friday 7	Saturday 8
all-day							
8am							
9am		9:00 9:00 9:00 9:00 9:00 9:00 9:00 AJA Bar BSC for Kyr Sav Tra	9:00 9:00 9:00 9:00 9:00 Com Geov Herb Park	9:00 9:00 9:00 9:00 9:00 Ghali Khali Lami Zaybi	9:00 9:00 Daily product	9:00 9:00 9:00 9:00 Celect Fast MAK Safa	
10am		Grc Nor Sale lab: Sale Sale Dei	E-Co Dem Sales Merc	Sales for oi org: Ph:	Offer Moham Modified	Sales ( Halme Tradin Baken	
11am		Sak for: Mai EDI call Call on	Sales Web: on call appli	Sales Offer Sales Nori: New	Msallam Offer	Mohar EDM Noria Noria/	
12pm							
1pm							
2pm							
3pm							
4pm							
5pm							

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# QUOTES



QUOTES SALES ACCOUNTS ACTIVITIES SUPPORT COLLABORATION ALL

CREATE ▾

Search



Create Quote



Address Information



View Quotes



Import



Import Line Items

Account:



Contact:



## Billing Address

Street:

City:

State:

Postal Code:

Country:

## Shipping Address

Street:

City:

State:

Postal Code:

Country:

Copy address from left:

☐

## Line Items



Currency:

Line Items:

ADD GROUP

Total:

Discount:

Subtotal:

Shipping:

Shipping Tax:



--None-- ▾



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# E-MAILS

HOME EMAILS SALES ACCOUNTS ACTIVITIES SUPPORT COLLABORATION ALL

CREATE ▾



Mohammad Msallam ▾

View My Email

Create Email Template

View Email Templates

CHECK MAIL

COMPOSE

SETTINGS

[Help](#)

Folders



My Email

(0 messages)

Compose ✕

SEND

SAVE DRAFT

ATTACH

OPTIONS

--None-- ▾

From: Mohammad Msallam (mmsalla@edm.com.lb) - My Settings ▾

Move To Bcc

TO:

Add Cc | Add Bcc

Subject:

HTML



Styles ▾

Format ▾

Font Family ▾

Font Size ▾

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# DASHBOARD

[SALES](#)[ACCOUNTS](#)[ACTIVITIES](#)[SUPPORT](#)[COLLABORATION](#)[ALL](#)[CREATE](#) ▼[SUITECRM DASHBOARD](#)[ACTIONS](#) ▼

## MY PROJECTS



11 1 (1 - 4 of 4) 11

Name	Project Manager
IMS: Noria Project	Mohammad Msallam
Noria Project ( Acc/ Stock / Retail)	Mohammad Msallam
Noria Project Town Project	Mohammad Msallam
Noria Project	Mohammad Msallam

## MY OPEN TASKS



11 1 (1 - 5 of 1656) 11

Close	Subject	Related to	Priority	Status	Start Date	Due Date
	Offer		High	Completed	04/04/2017 09:00am	11/04/2017
	Call		High	Completed	04/04/2017 09:00am	07/04/2017
	Noria/EDM		High	Completed	04/04/2017 09:00am	07/04/2017

## REPORTS

[Home](#) [REPORTS](#) [SALES](#) [ACCOUNTS](#) [ACTIVITIES](#) [SUPPORT](#) [COLLABORATION](#) [ALL](#)

CREATE ▾



Mohammad Msallam

## ACTIONS ▾

## BASIC

## Parameters

	Module	Field	Operator	Type	Value
1	Tasks	Assigned to	Equal To	Value	<input type="text"/>

UPDATE

## Report

Date Created	Assigned to	Subject	Client	Duration/Hours	Product	Start Date
05/04/2017 04:39pm	Hana	knowledge base implementation	EDM	2.50	CRM	05/04/2017 09:00am
04/04/2017 03:52pm	Hana	knowledge base implementation	EDM	1.50	EDM POS	04/04/2017 09:00am