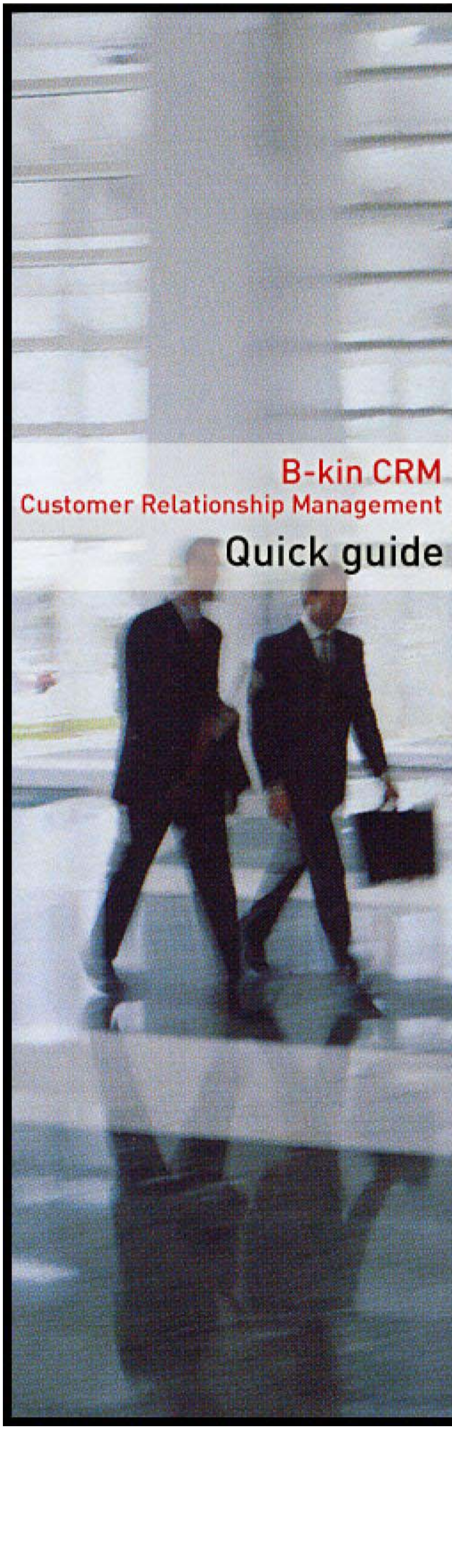


B-kin CRM
Customer Relationship Management
Quick guide

agenda
documents
reports
leads
accounts
contacts
activities
campaigns
opportunities
quotes...

B-KiN

B-kin CRM quick guide

Firstly, it is important to fully understand the concepts that are managed in **B-kin CRM** and analyze the roles each one of them have in your organization:

Leads

A **lead** is a potential customer with whom contacts and meetings will be maintained thus potentially converting him into a real customer. For example, a lead could be someone whom you met at a meeting, or someone who was interested in your product. It can also be someone who registered in your companies' web site.

Accounts

An **account** is the main element in the sales activity. Accounts can represent companies or organizations associated to your business as a customer, as a competitor or as a business partner. In each account you will be able to store information such as names, addresses, telephone numbers, etc. In an account you can have more than one person with whom you maintain a real business relation with. These will be the **contacts** of the account.

Contacts

Contacts are the individuals associated to your B-kin CRM account. You can store information such as telephone numbers, addresses, type of business, position, departments, etc. for each of your contacts.

Activities

The **activities** are tasks or events programmed in your calendar. You can define and follow up on the development of your activities associated to your contacts, candidates, opportunities and quotes. When creating an activity, you will be able to specify its priority, type, status and end date. You can assign the activity to yourself or to other users.

Opportunities

In B-kin CRM, **opportunities** represent future sales associated to your accounts. Efficient management will allow you to regularly predict your sales. An opportunity can result in one or more quotes thus subsequently converting them into sales.

Quotes

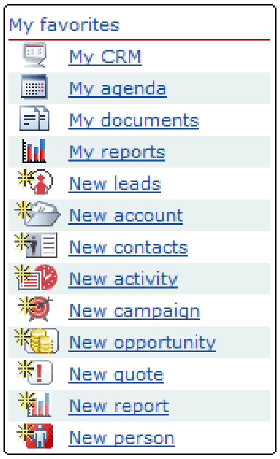
The **quotes** represent the fixed commercial proposals send to the customers who might be interested in your product. Comparing to the opportunities, which are not a defined representation of the elements, quotes represents the formal proposal which is generally fixed in a document. You can also store the **document related to the quote** and monitor the different versions of it.

Products

A **product** is an article or a service offered by your business. The product tree can be divided in many sub-products in order to group the structure of products and services in your company. The break down in the families and sub-families will enable you to organize opportunities and quotes according to the business nature of your organization.

It is possible that some of these concepts might not make any sense to your sales activities, so adapt **B-kin CRM** accordingly to your business. Some organizations who work in the prospecting of new customers may not use the concept of a lead but may only use **accounts** and **contacts**. There will also be organizations that will only use opportunities and quotes whilst for others it will be sufficient to just use opportunities in order to capture sales prediction.

Start working with your CRM



In **My favorites**, available on the bottom left hand side of the page, you can start to set-up your accounts, contacts, activities, opportunities and quotes.

If you are currently using a different sales management tool other than **B-kin CRM,** it is not necessary to re-enter all your records. Most of these applications allow you to export your information into a text file and then import it into **B-kin CRM**. To do this, you have to select Save as… or Export… and select the csv. format.

You will then be able to import this information following the instructions when clicking on "Import data" under the tab "settings".

Release cycle

B-kin CRM allows you to manage your release cycle, captured in the following basic actions:

1. - When detecting a reference which could imply a future sale, you can add a **New Lead**. If you have obtained a list which you are going to work on, you can **import** the information via Microsoft Excel or any other files, this to include all of the leads at once.

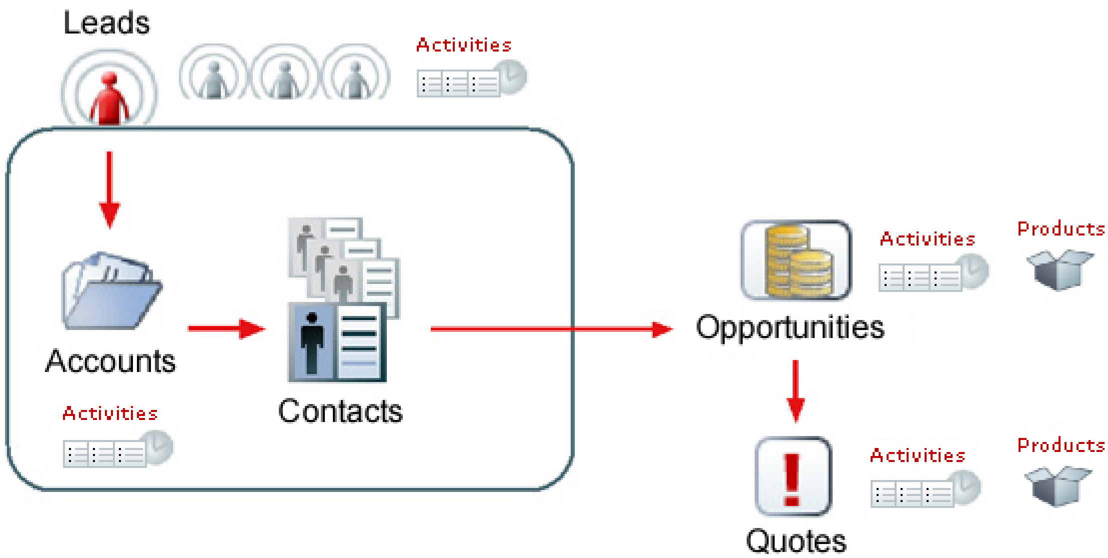
2. - Once you start working with telephone calls, e-mails, or meetings, you will then add a **new activity** for your lead, which you have previously created as "planned/pending". Once worked on, update it as "finished/closed".

3. - If you consider that a lead can become an opportunity, start to **update** the information of the lead by creating an account with a contact. A clear criterion has to be defined by the sales organization as when to transform a lead into a real customer.

4. – One or more associated quotes might arise when working on **opportunities**. Quotes are always created from an opportunity and represent the sales proposal that will then be sent to your customer. The proposal usually includes price quotes, validity period, closing date, payment method and the rest of the agreed clauses offered.

Opportunities and quotes can have a product associated which will then enable you to analyze using different criteria, sales prediction. (by sales, by account, by product…).

B-kin CRM commercial activity workflow.



Iconography

Here below is a description of the iconography used in B-kin CRM:

ICONOGRAPHY USED IN B-KIN CRM

Main help	Specific help	Export to MS Excel	Print	Discussion group
Search	Search filter	Save search	Documents	Transform into a lead
Create new	Edit	Detail information	Delete	Assign opportunity
Save	Cancel	Accept	Unassign	New opportunity
Assign activity	Assign lead	Assign contact	Assign account	
Assign product	New activity	New contact	New quote	