

ADD QUALITY TO  
YOUR CUSTOMER  
SERVICES

CRM321

# Customer Relationship Management (CRM)

1. The most important and easy-to-use part of the company's IT infrastructure.

2. Best-in-class cross-organizational tasks functionality.

3. Focus on Customers to help You control quality of:

- Customer information
- Invoicing & billing
- Helpdesk services
- Communications (calls, meetings, mails, messaging)
- and more

# CRM321

- ▶ **Open Source “SuiteCRM” system as a foundation**  
The best platform «as is» on the market.
- ▶ **Custom codebase**  
Valuable extensions from Lab321.
- ▶ **True DevOps - “You build it, you run it”**  
30 years of experience in various industries: utilities, banks, government, SMB and more.

# CRM321

- ▶ **Custom codebase**
  - ▶ Industry specific extensions
  - ▶ Integration with website/mobile app, API
  - ▶ Business Process Management (BPM) BPM321 or Camunda
  - ▶ Auto-tests & live documentation (TDD – test driven development)
  - ▶ New User Interface (UI) – React+Scala

# CRM321

## Industry specific extensions

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SALES MARKETING SUPPORT ACTIVITIES COLLABORATION ALL CREATE Search...

Recently Viewed

- Big Deal
- Boia-Boia
- Denny Kingston
- test
- Patricia Ad...

### SUITECRM DASHBOARD ACTIONS

#### ALL OPPORTUNITIES BY LEAD SOURCE BY OUTCOME

#### ALL OPPORTUNITIES BY LEAD SOURCE

#### MY CALLS

Case	Subject	Related to	Start Date	Accept?	Status
X	Project 02/04/2019	Project 02/04/2019	02/24/2019 13:08	Yes	Planned
X	Disc Taylor	Bruce Lane	01/28/2019 13:31	Yes	Planned
X	Project 06/13/2018	Project 03/17/2019	10/22/2018 11:39	Yes	Planned
X	Mobile Technology	Mobile Technology	02/24/2019 11:04	Yes	Planned
X	Soft loan offer		02/22/2019 04:32	Yes	Planned

#### CAMPAIGN ROI

No Results

#### MY MEETINGS

Case	Subject	Related to	Start Date	Accept?
X	Project 02/08/2018	Project 02/15/2019	02/10/2019 07:31	Yes
X	Case Group 11/09/2018	Case Group 11/09/2018	03/03/2019 01:10	Yes
X	Pastor Bancorp 09/07/2018	Pastor Bancorp 09/07/2018	05/13/2019 23:17	Yes
X	Edge 06/03/2018		10/30/2019 18:34	Yes
X	A mixed call	A mixed call	06/17/2019 09:58	Yes

#### MY TOP OPEN OPPORTUNITIES

No Data

#### MY LEADS

Name	Title	Office Phone	Email Address
Beverly Robinson	Title	(714) 258-262	lyth@hwa.7pg
Jerry Byrne	Title	(807) 861-604	1199@pca-322
Harris Bentley	Title	4926704-442	919@pca-322
Gilbert Crystal	Title	(248) 114-130	hcod@cdp.on
Dana Ford	Title	(654) 113-242	h9p@7ao.ngd

#### MY ACTIVITY STREAM

Denny Kingston

- Christian Gordon created a new case **A mixed call for (Shuntia) Alina** Description 2 Hours 14 Minutes ago
- Alicia Effects converted a lead **(Eric) Washington** 4 Minutes ago
- Christian Gordon created a new case **Soft loan offer for (Crystal) Alin** Description 20 Hours ago
- Administrator created a new lead **(Lisa) Roberts** Yesterday
- Administrator converted a lead **(William) Vance** Yesterday
- boia adds created a new case **Offer on a new product for (B) Description** 2 days ago

#### MY ACCOUNTS

Name	Type	Website	Phone	Billing Country
Boia-Boia				
Hart Entertainment group	Press	5up4t.com	(510) 503-400	DEU
New York Markets	Analyst	nyfm.com	(212) 237-232	GBR
Williams Manufacturing	Prospect	7h7pg.com	(340) 456-272	AUS
Campbell Automotive	Analyst	947p.com	(207) 283-674	AUS

#### PIPELINE BY SALES STAGE

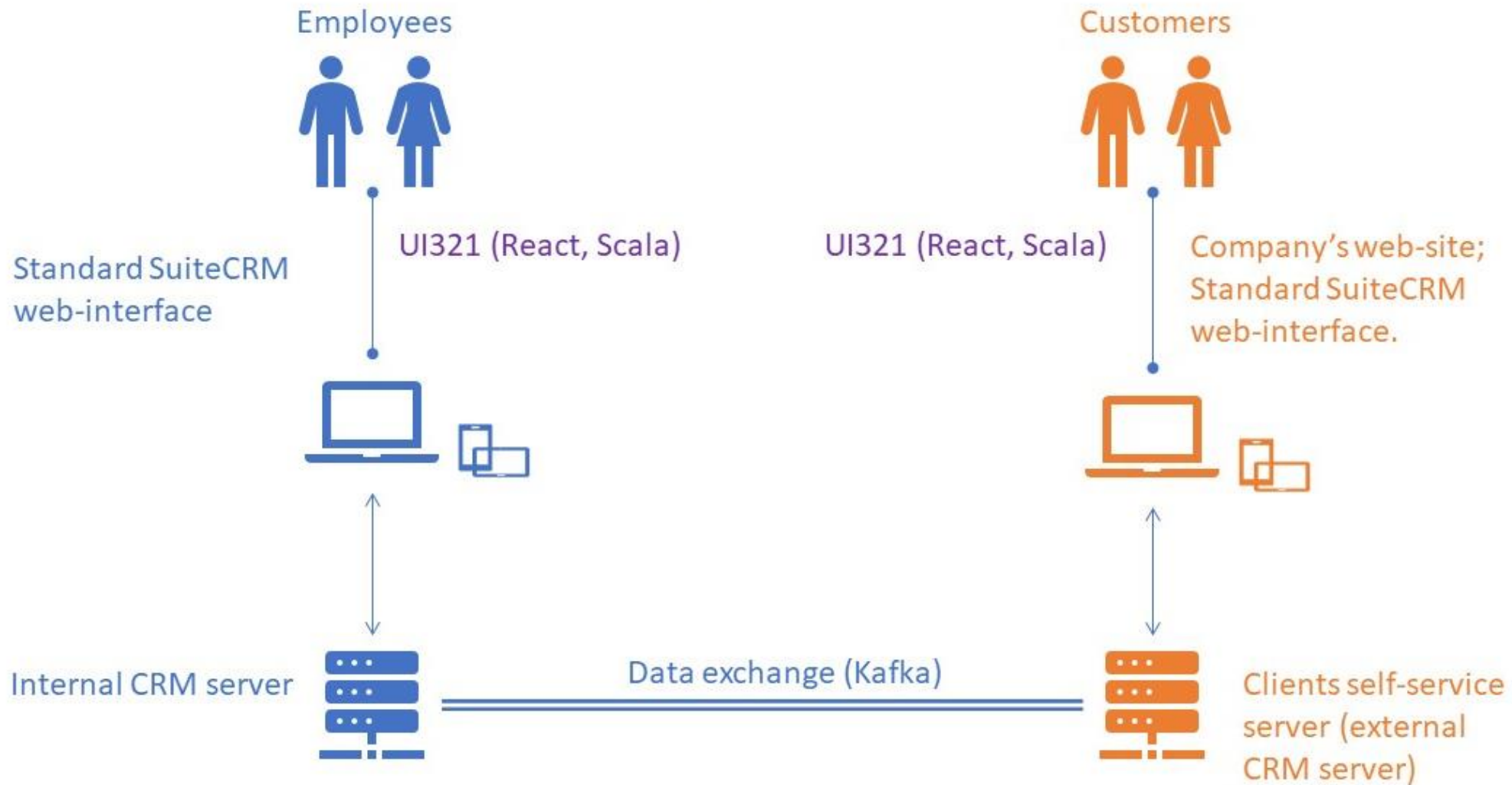
Supercharged by SuiteCRM | Powered by SugarCRM

postbox@lab321.de

# CRM321

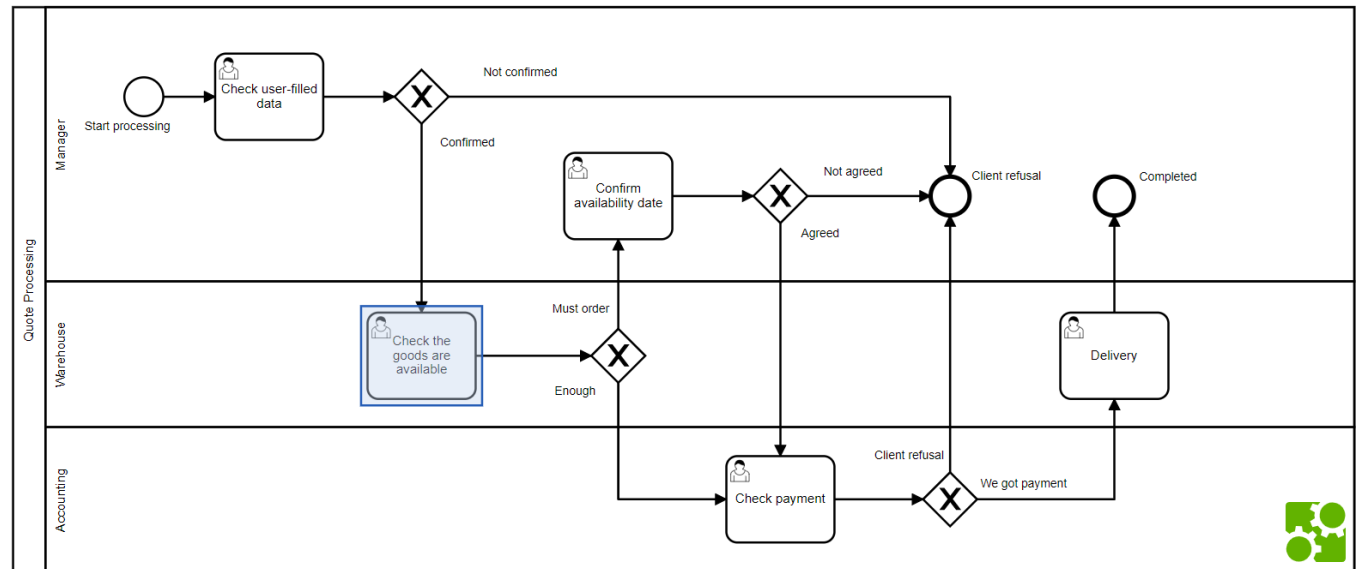
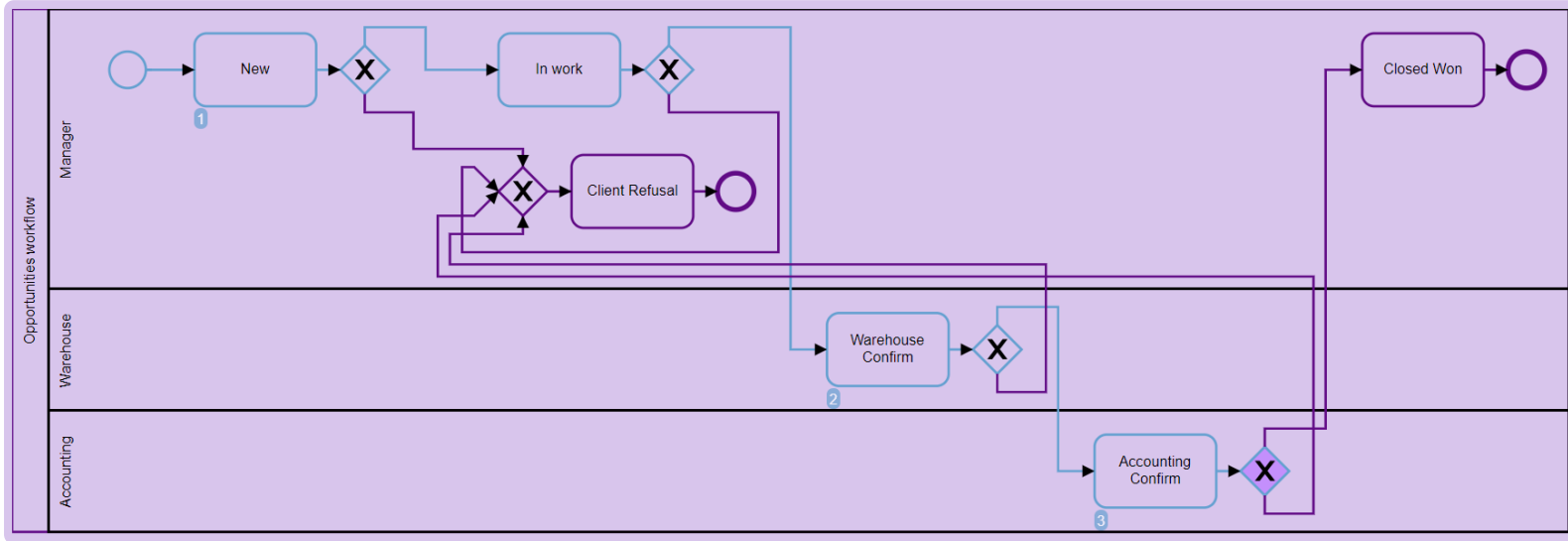
## New UI

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# BPM321

## or Camunda



# CRM321

## Autotests & Live Docs (TDD)

OpportunityWorkflowTest.php x

OpportunityWorkflowTest.php

Run

Progress: 81% Result: - Start date: 2020-02-10 17:49

OpportunityWorkflowTest  
testWorkflow

Opportunity Workflow

Prerequisites:

- account  
Account link
- this account is in "London" group
- Create opportunity

File	Progress	Result	Start date
<input type="checkbox"/> ErrorTest.php	-	⊖	2019-02-27 19:21
<input type="checkbox"/> OpportunityWorkflowTest.php	-	⊕	2020-02-10 17:49
<input type="checkbox"/> PingTest.php	-	⊕	2019-02-27 19:22

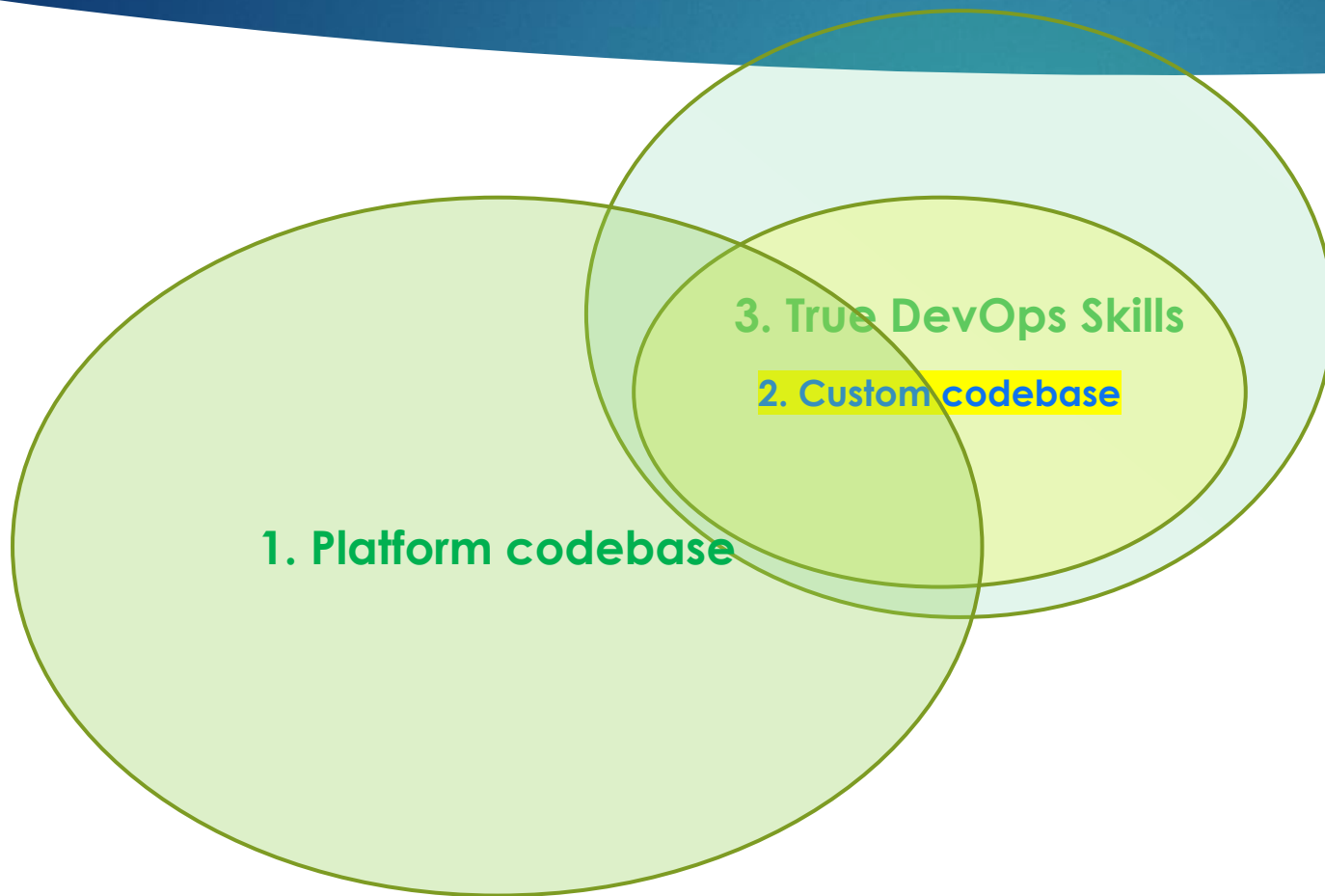
User "Danny Kingston" logins. The user has role "Manager" and same group to account. The user creates opportunity with type "New Business". To achieve this the user goes to detail page of account, opens opportunities subpanel and click "Create" button.

The screenshot shows the CRM321 interface for an account named 'BOLA-BOLA'. The top navigation bar includes 'ACCOUNTS', 'SALES', 'MARKETING', 'SUPPORT', 'ACTIVITIES', 'COLLABORATION', and 'ALL'. A 'CREATE' button is visible in the top right. The left sidebar contains options for 'Create Account', 'View Accounts', and 'Import Accounts', along with a 'Recently Viewed' list and 'Favorites'. The main content area shows the account details for 'BOLA-BOLA' with tabs for 'OVERVIEW', 'MORE INFORMATION', 'OTHER', and 'ACTIONS'. The details include:

- Name: Bola-Bola
- Office Phone: [empty]
- Website: [empty]
- Fax: [empty]
- Email Address: --None--
- Billing Address: [empty] (with a 'COPY...' button)
- Shipping Address: [empty]
- Description: [empty]
- Assigned to: Danny Kingston



# CRM321



## ▶ DevOps321

- ▶ “You build it, you run it”
- ▶ Cross-functional, cross-organizational team
- ▶ TDD (test driven development)



Email:  
postbox@lab321.de

BY SERGEJ BUSCH