Customer Relationship Management For Sokkar Banat Store

STUDENT

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SUPERVISOR

Najwan Deleq

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1 Idea Of Our Project

- Many companies today tend to organize their relationships with customers to gain customer satisfaction, implement their requests as quickly as possible, and attract more customers.

- Customer relationship management (CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers. The goal is simple: to improve business relationships. A CRM system helps companies stay connected to customers , streamline processes, and improve profitability.

2 History Of The Company

1

Sokkar Banat store was established in 2012 in the central market in Nablus.

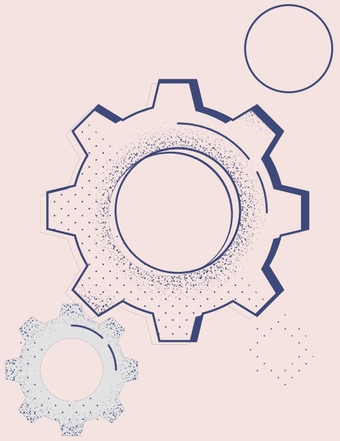
2

At the beginning, the shop was limited to selling clothes imported from Turkey. Then new and various merchandise were added, such as: cosmetics, make-up, bags, skincare products. The institution took the agency of several companies, such as Golden Collection, Top face, Health Beauty, Himalaya, Evill, and Score, and the institution recently started manufacturing its own clothes.

3

Then the online purchase service became available by ordering through social networking sites.

3 Problems



With the presence of a large number of customers and reliance on-demand on social media pages, some messages are dispersed.

After the different analysis that has been done, such as SWOT analysis, we have found many problems, such as the engagement on social media.

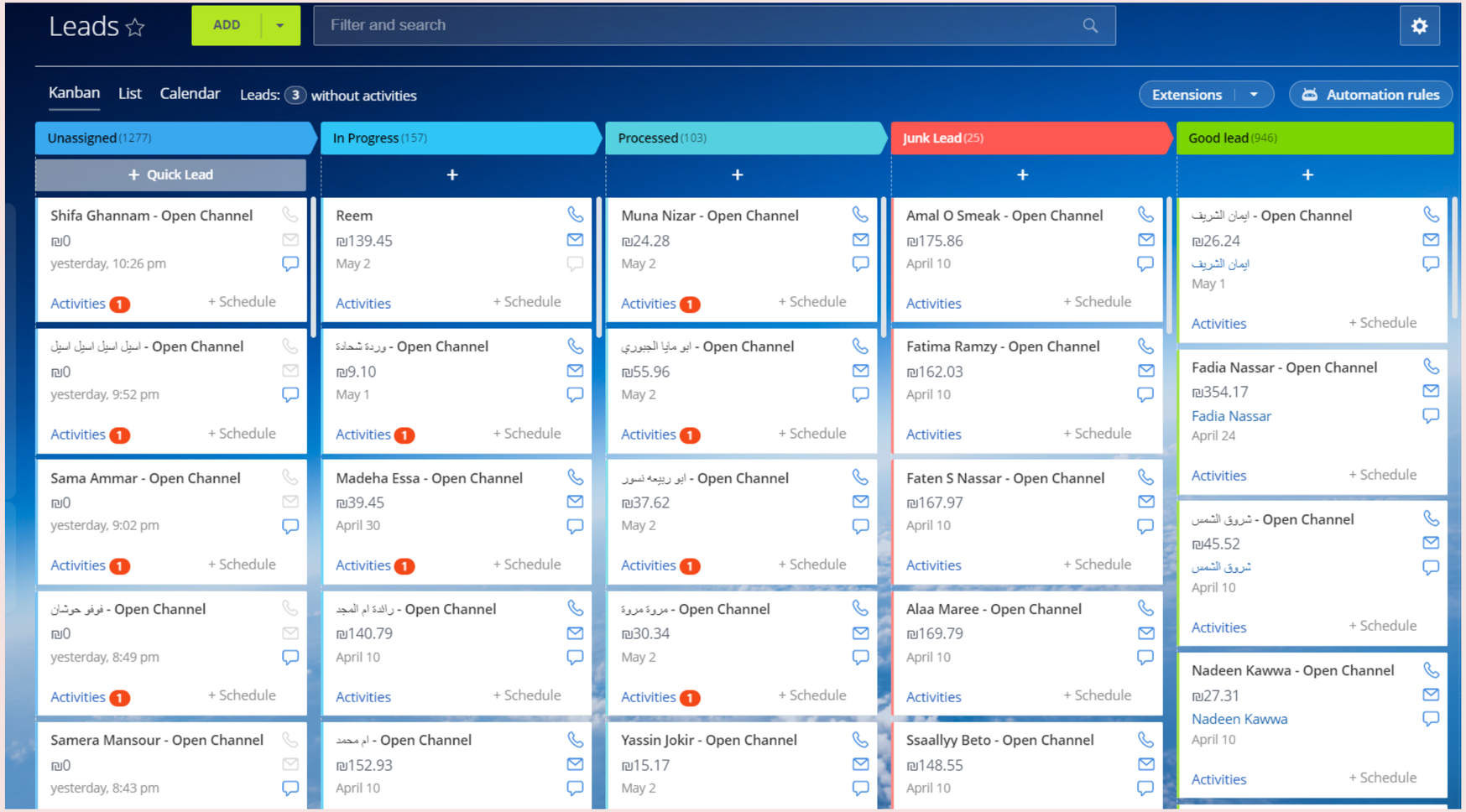
4 Solution

In order to arrange customer requests and record their data, Bitrix CRM was used.

Building an online store that contains all the details from displaying products to the stage of ordering products

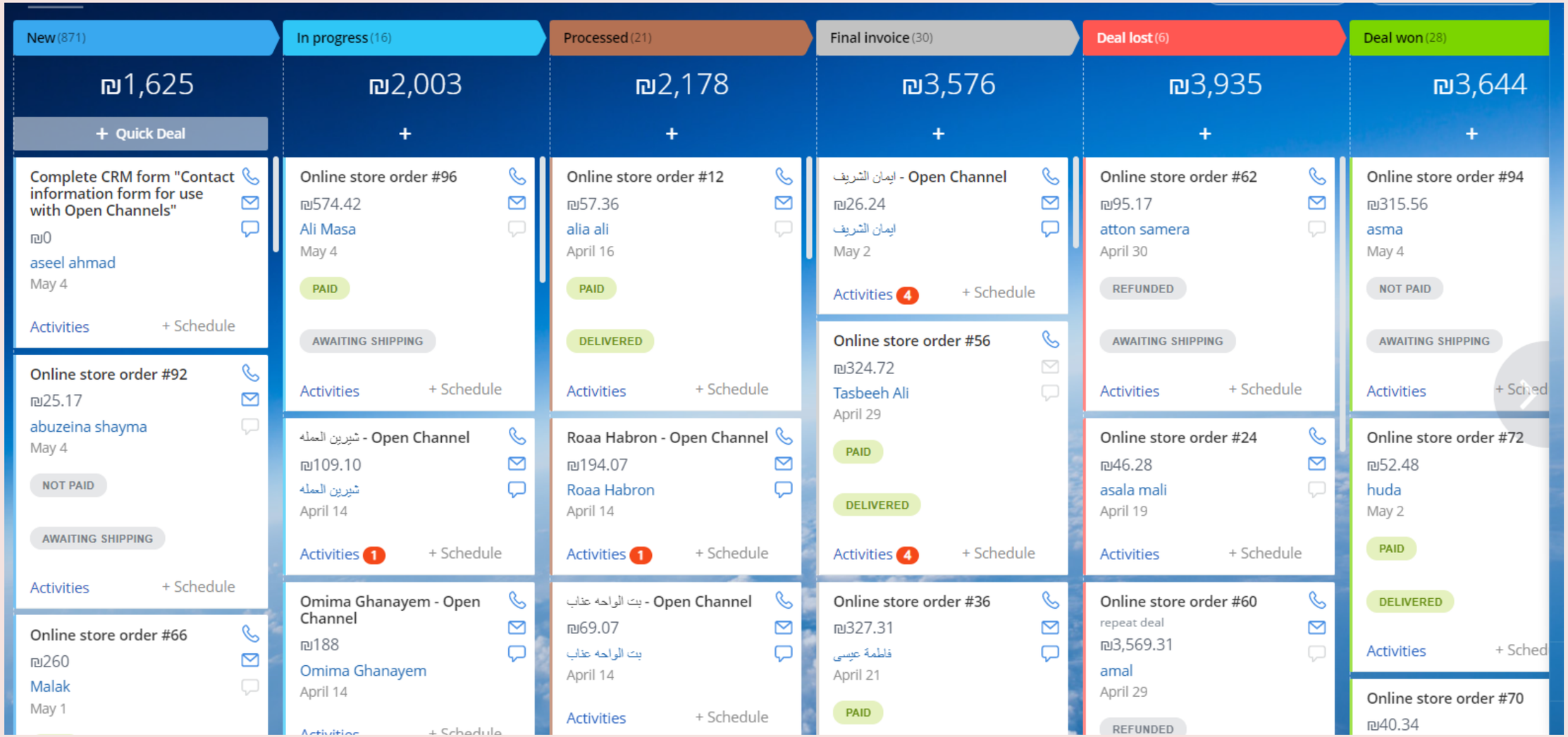
Implementation of CRM in Bitrix

Leads

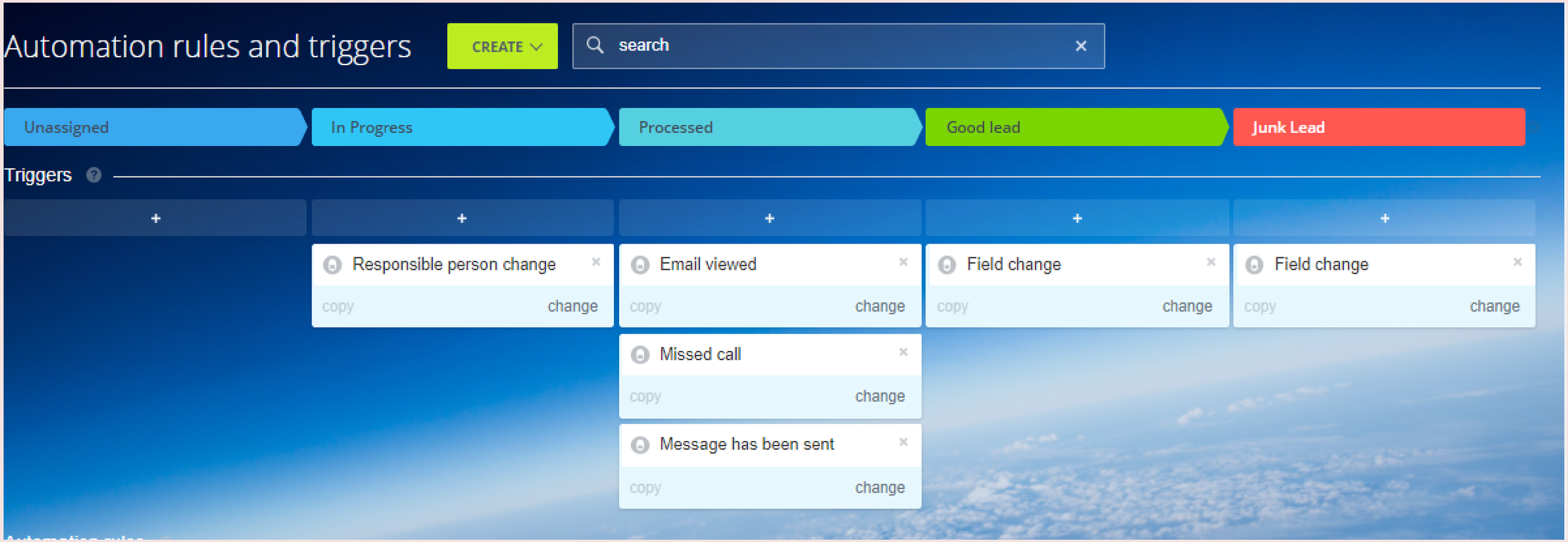


Implementation of CRM in Bitrix

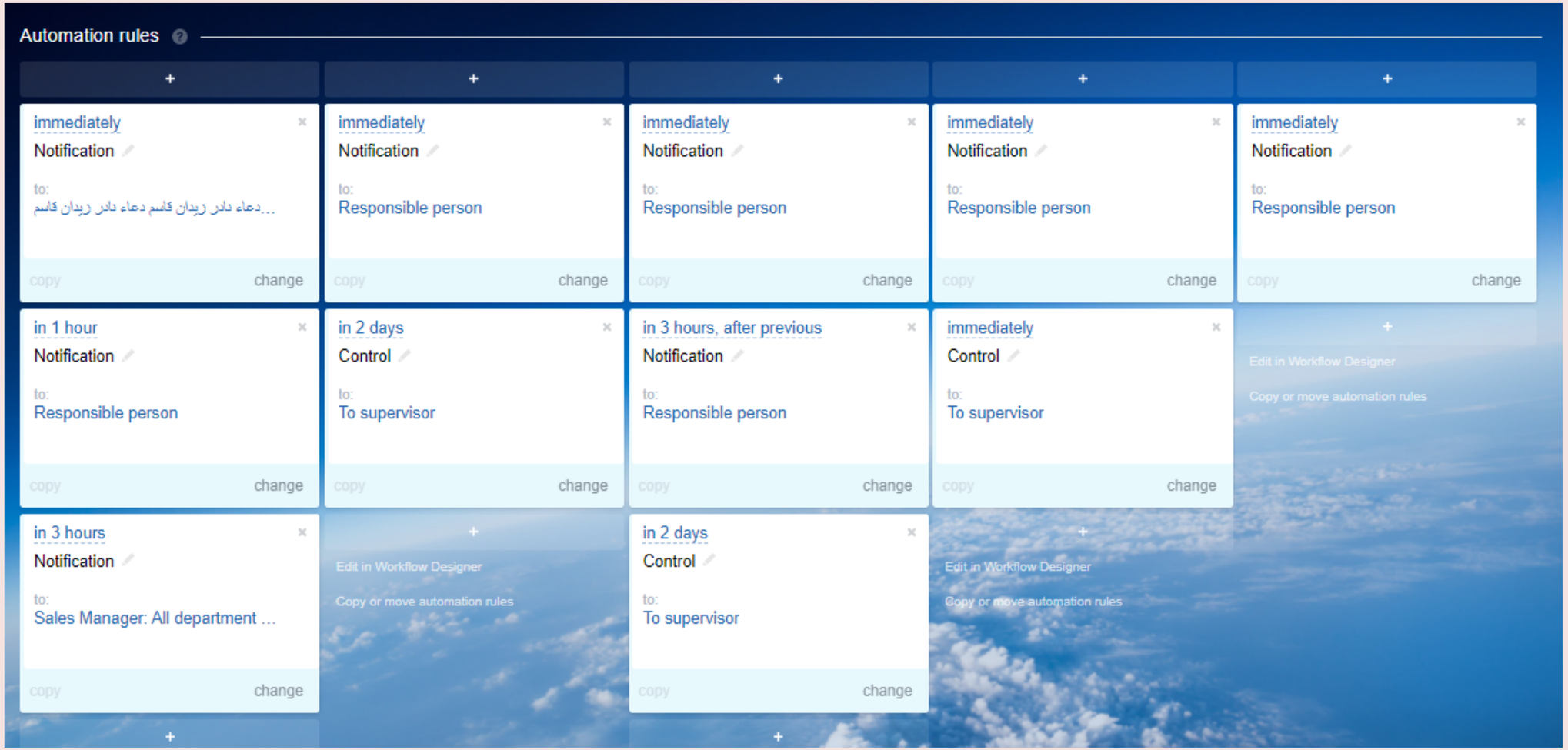
Deals



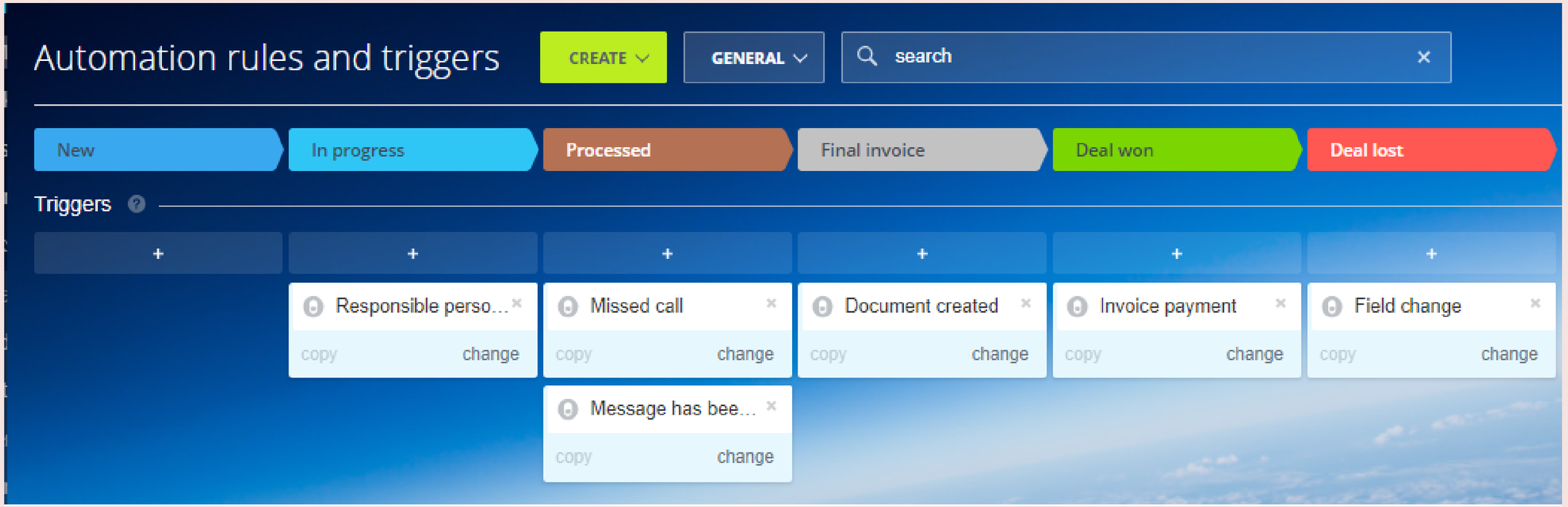
Triggers (Lead)



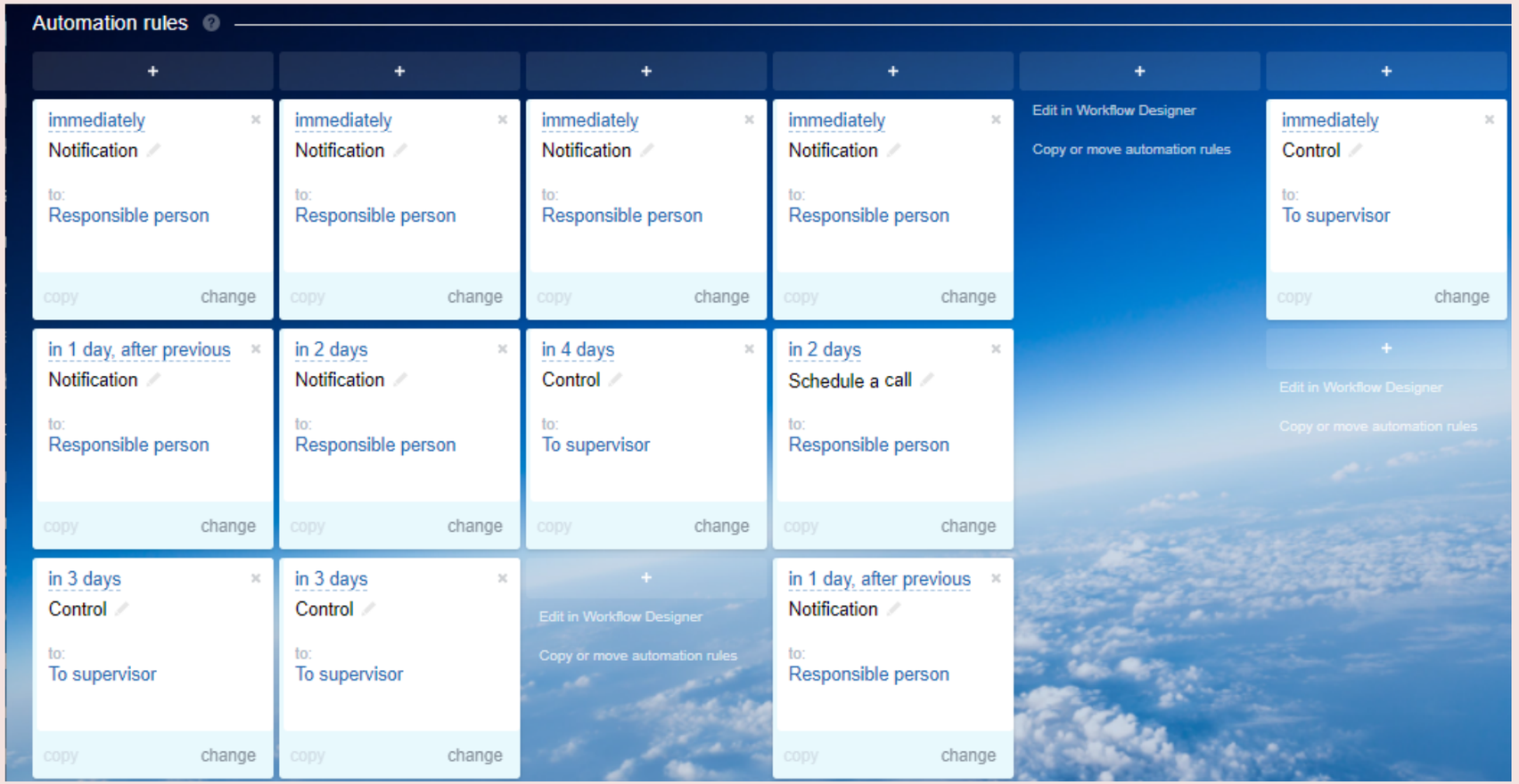
Automation Rules (Lead)



Triggers (Deal)

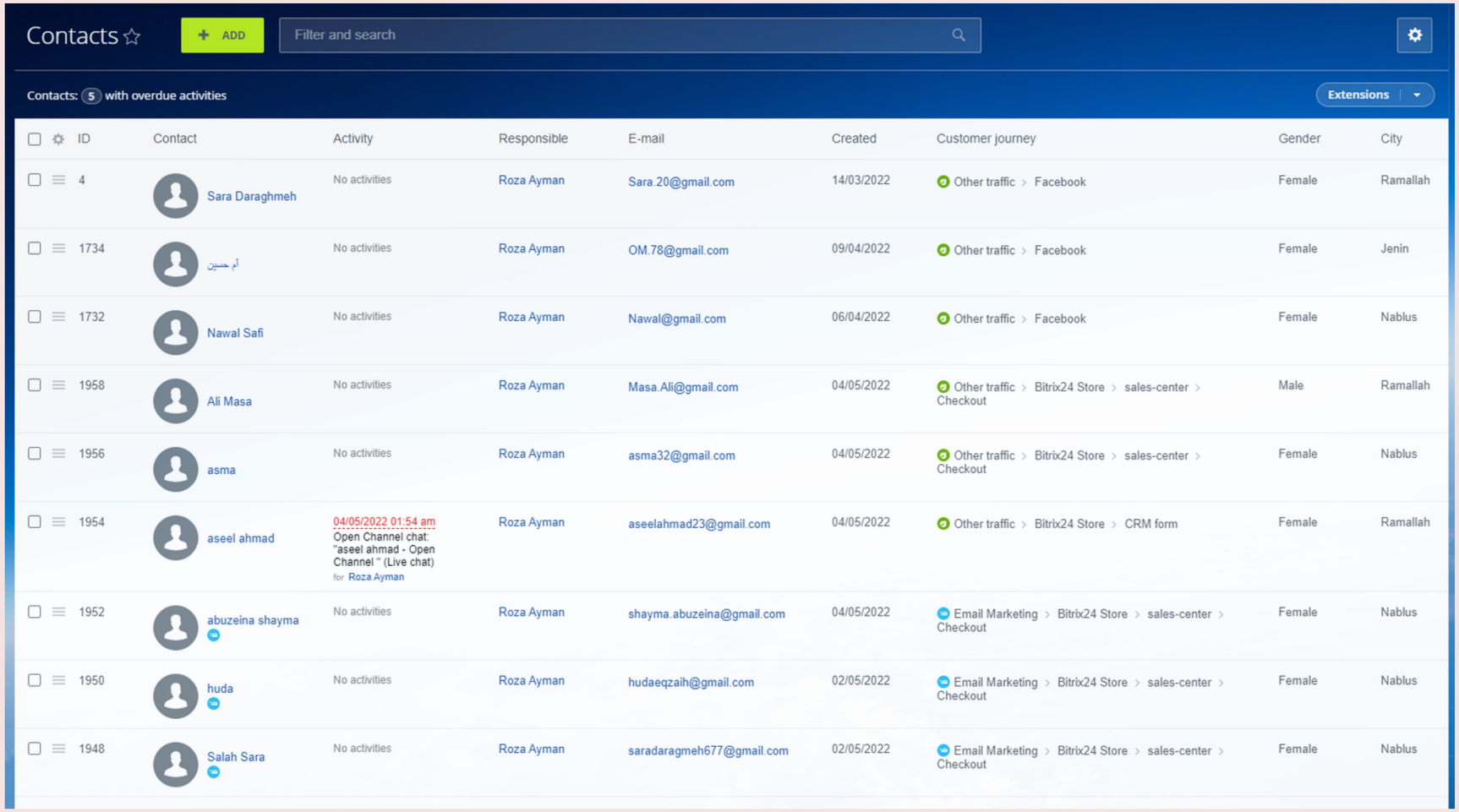


Automation Rules (Deal)



Implementation of CRM in Bitrix

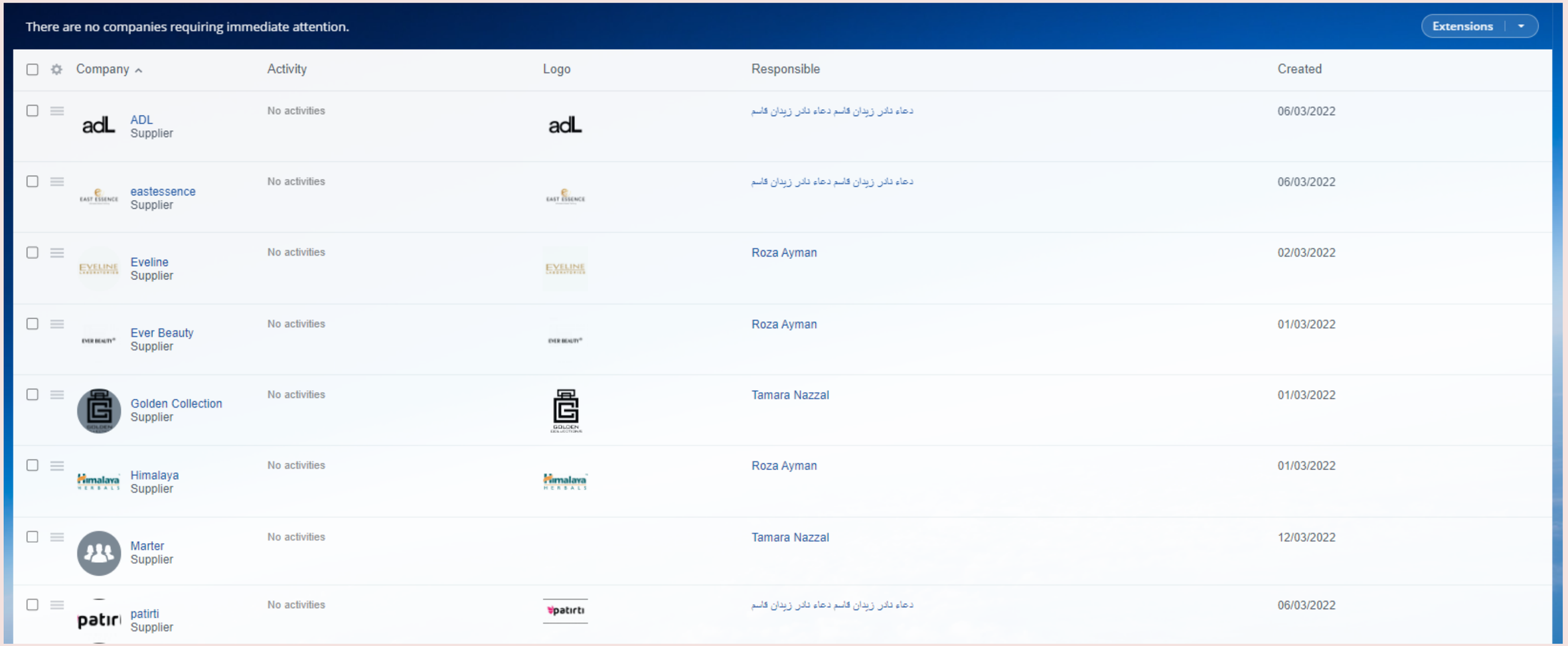
Contacts



ID	Contact	Activity	Responsible	E-mail	Created	Customer journey	Gender	City
4	Sara Daraghmeh	No activities	Roza Ayman	Sara.20@gmail.com	14/03/2022	Other traffic › Facebook	Female	Ramallah
1734	أم حسين	No activities	Roza Ayman	OM.78@gmail.com	09/04/2022	Other traffic › Facebook	Female	Jenin
1732	Nawal Safi	No activities	Roza Ayman	Nawal@gmail.com	06/04/2022	Other traffic › Facebook	Female	Nablus
1958	Ali Masa	No activities	Roza Ayman	Masa.Ali@gmail.com	04/05/2022	Other traffic › Bitrix24 Store › sales-center › Checkout	Male	Ramallah
1956	asma	No activities	Roza Ayman	asma32@gmail.com	04/05/2022	Other traffic › Bitrix24 Store › sales-center › Checkout	Female	Nablus
1954	aseel ahmad	04/05/2022 01:54 am Open Channel chat: "aseel ahmad - Open Channel " (Live chat) for Roza Ayman	Roza Ayman	aseelahmad23@gmail.com	04/05/2022	Other traffic › Bitrix24 Store › CRM form	Female	Ramallah
1952	abuzeina shayma	No activities	Roza Ayman	shayma.abuzeina@gmail.com	04/05/2022	Email Marketing › Bitrix24 Store › sales-center › Checkout	Female	Nablus
1950	huda	No activities	Roza Ayman	hudaeqzaih@gmail.com	02/05/2022	Email Marketing › Bitrix24 Store › sales-center › Checkout	Female	Nablus
1948	Salah Sara	No activities	Roza Ayman	saradaragmeh677@gmail.com	02/05/2022	Email Marketing › Bitrix24 Store › sales-center › Checkout	Female	Nablus

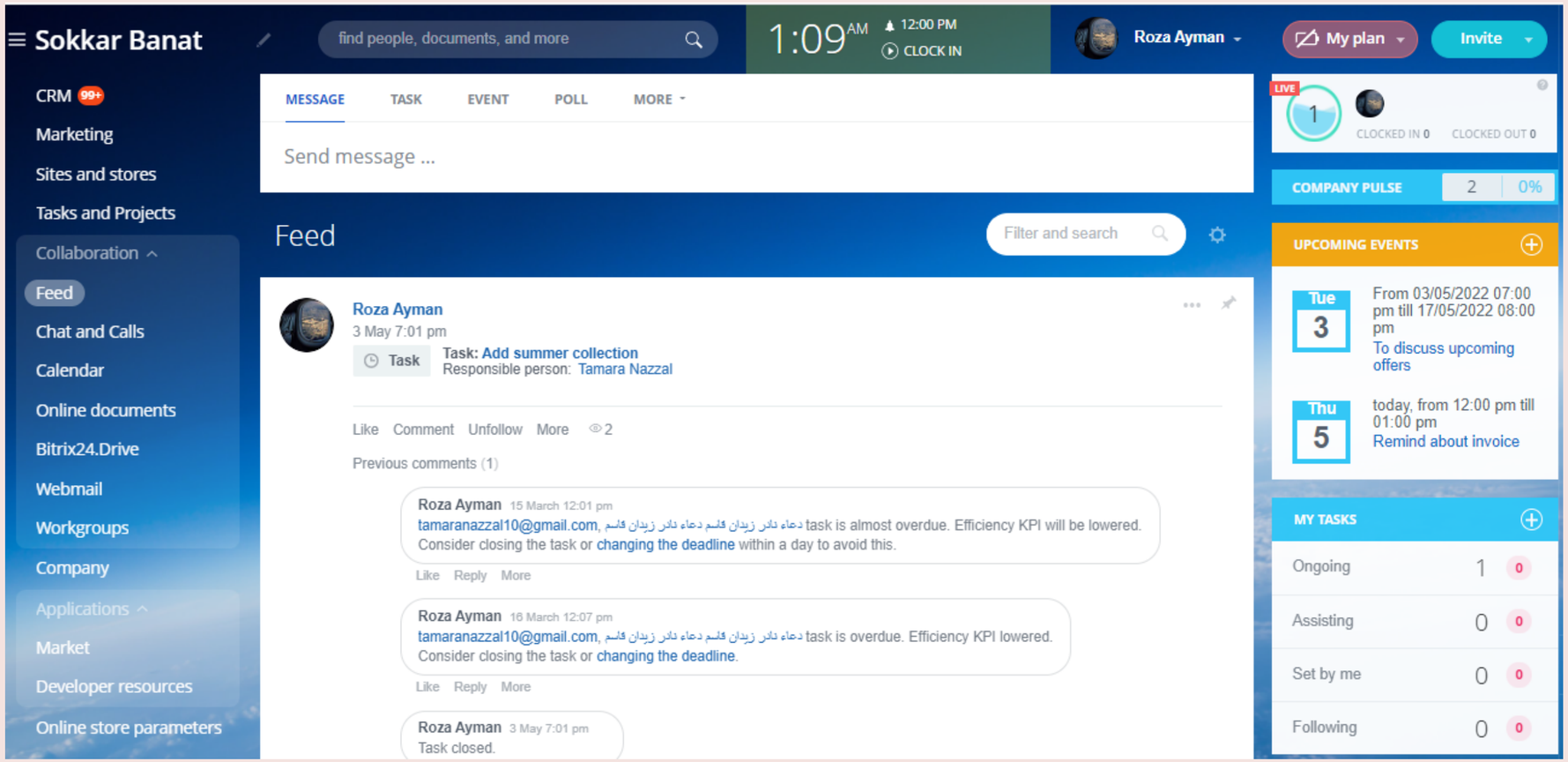
Implementation of CRM in Bitrix

Companies



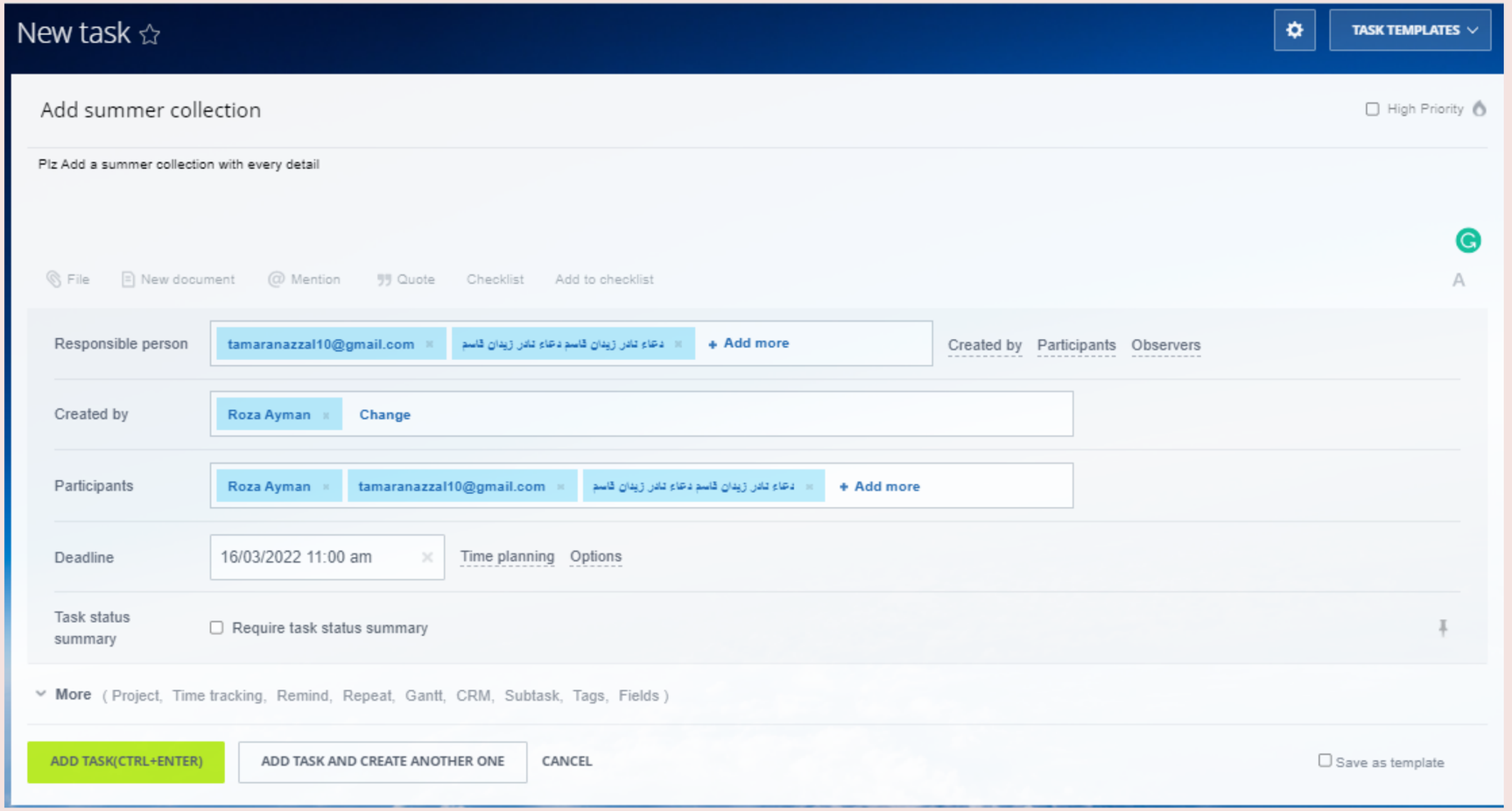
Implementation of CRM in Bitrix

Feed

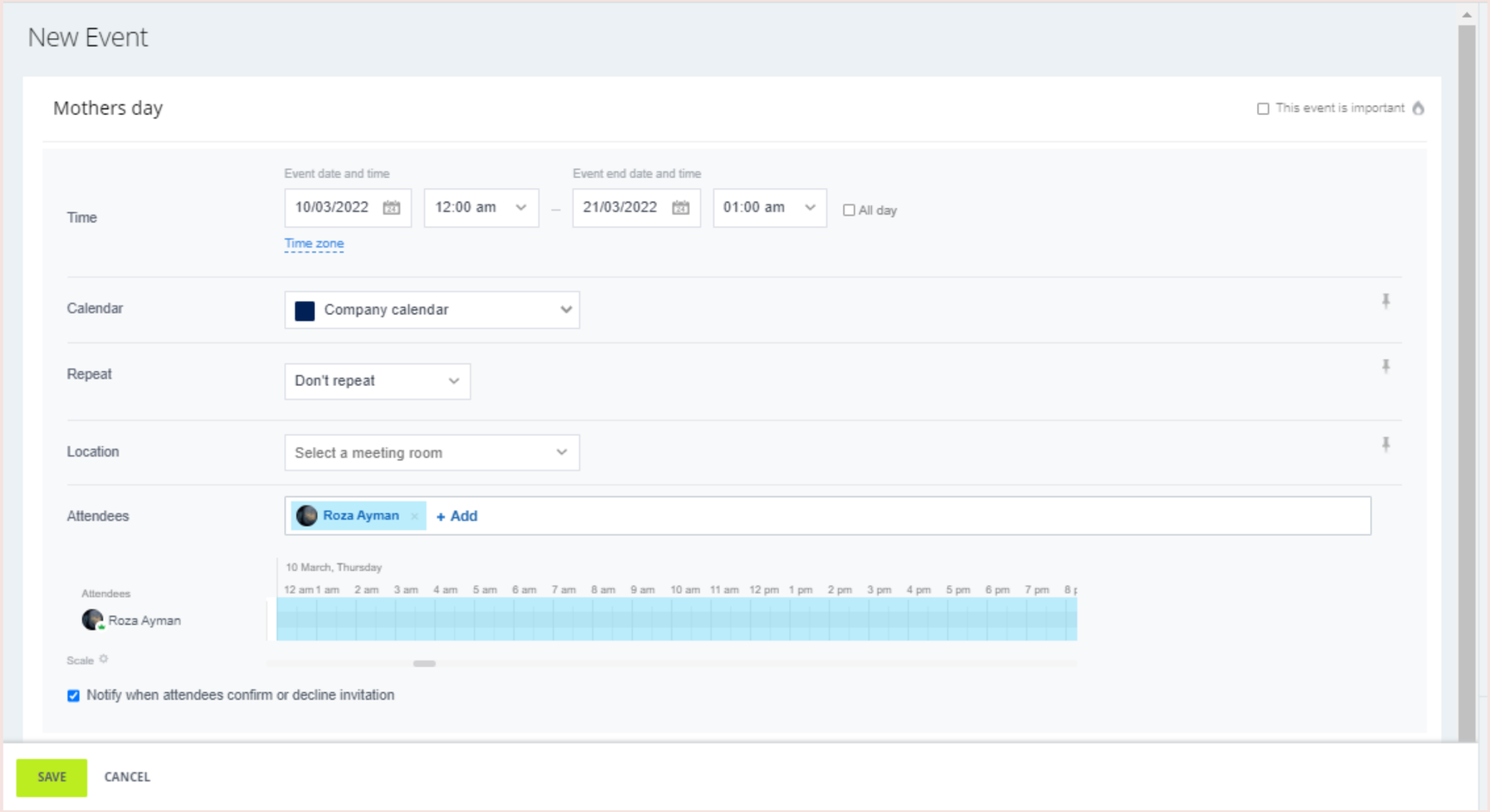


Implementation of CRM in Bitrix

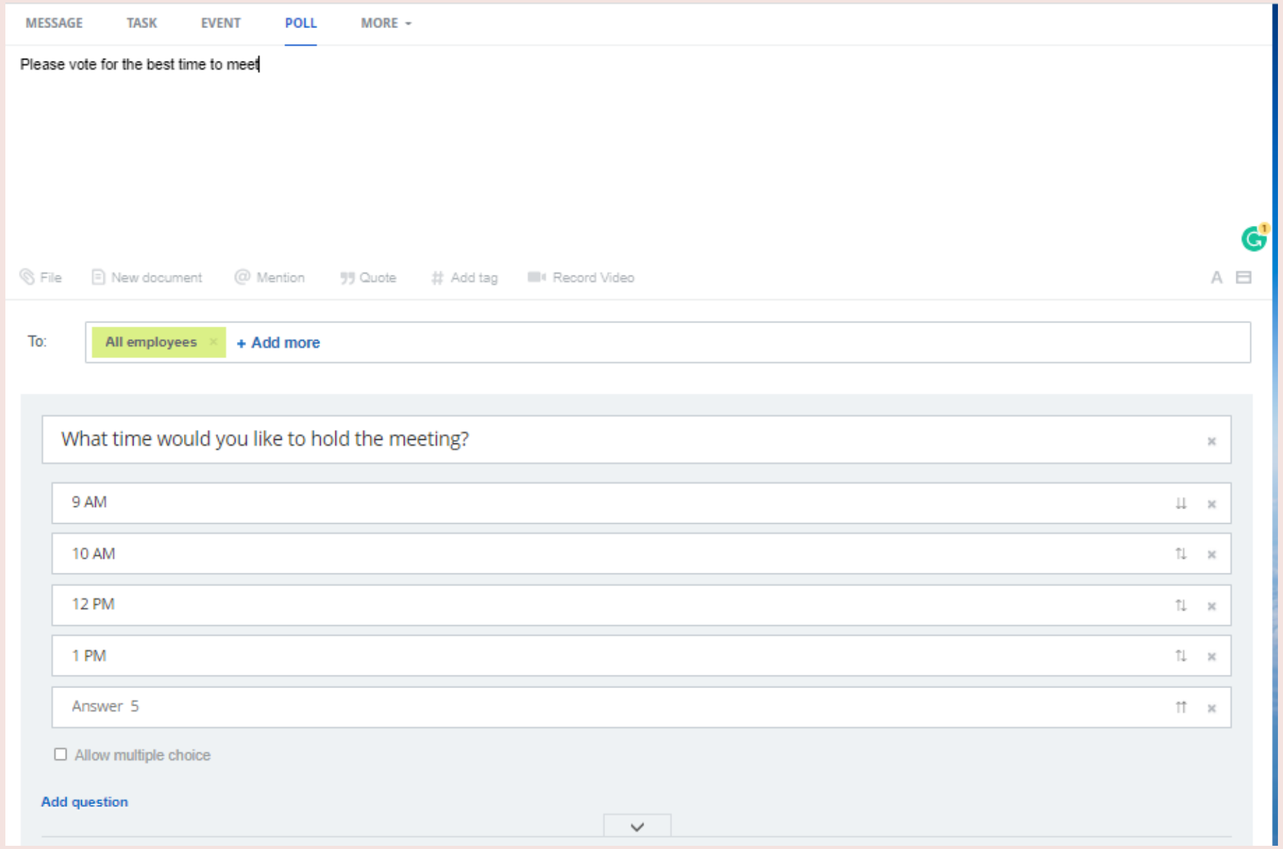
Task



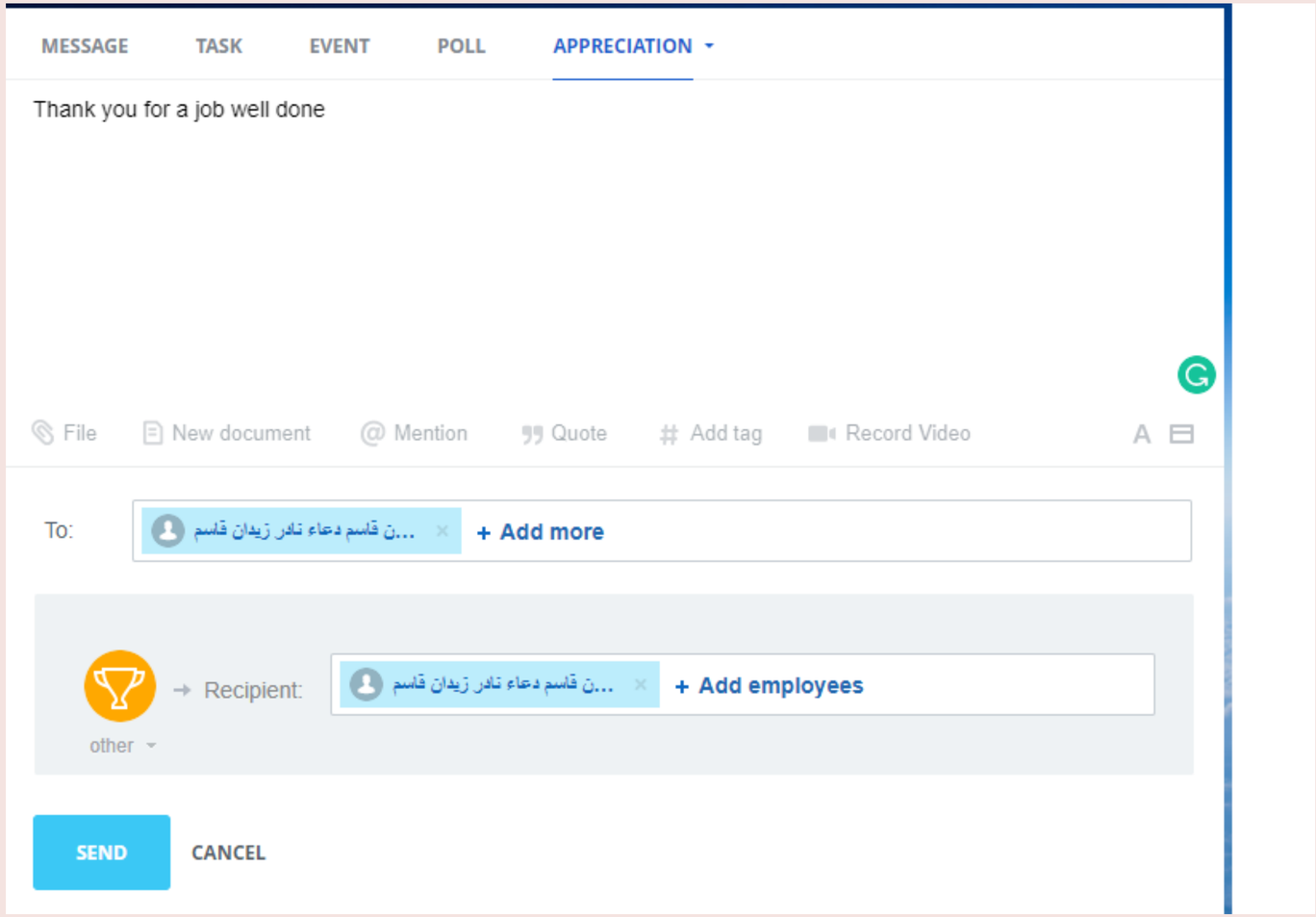
New Event


New Event
Mothers day
This event is important
Event date and time
Event end date and time
Time
10/03/2022
12:00 am
21/03/2022
01:00 am
All day
Time zone
Calendar
Company calendar
Repeat
Don't repeat
Location
Select a meeting room
Attendees
Roza Ayman
+ Add
10 March, Thursday
12 am 1 am 2 am 3 am 4 am 5 am 6 am 7 am 8 am 9 am 10 am 11 am 12 pm 1 pm 2 pm 3 pm 4 pm 5 pm 6 pm 7 pm
Attendees
Roza Ayman
Scale
Notify when attendees confirm or decline invitation
SAVE
CANCEL

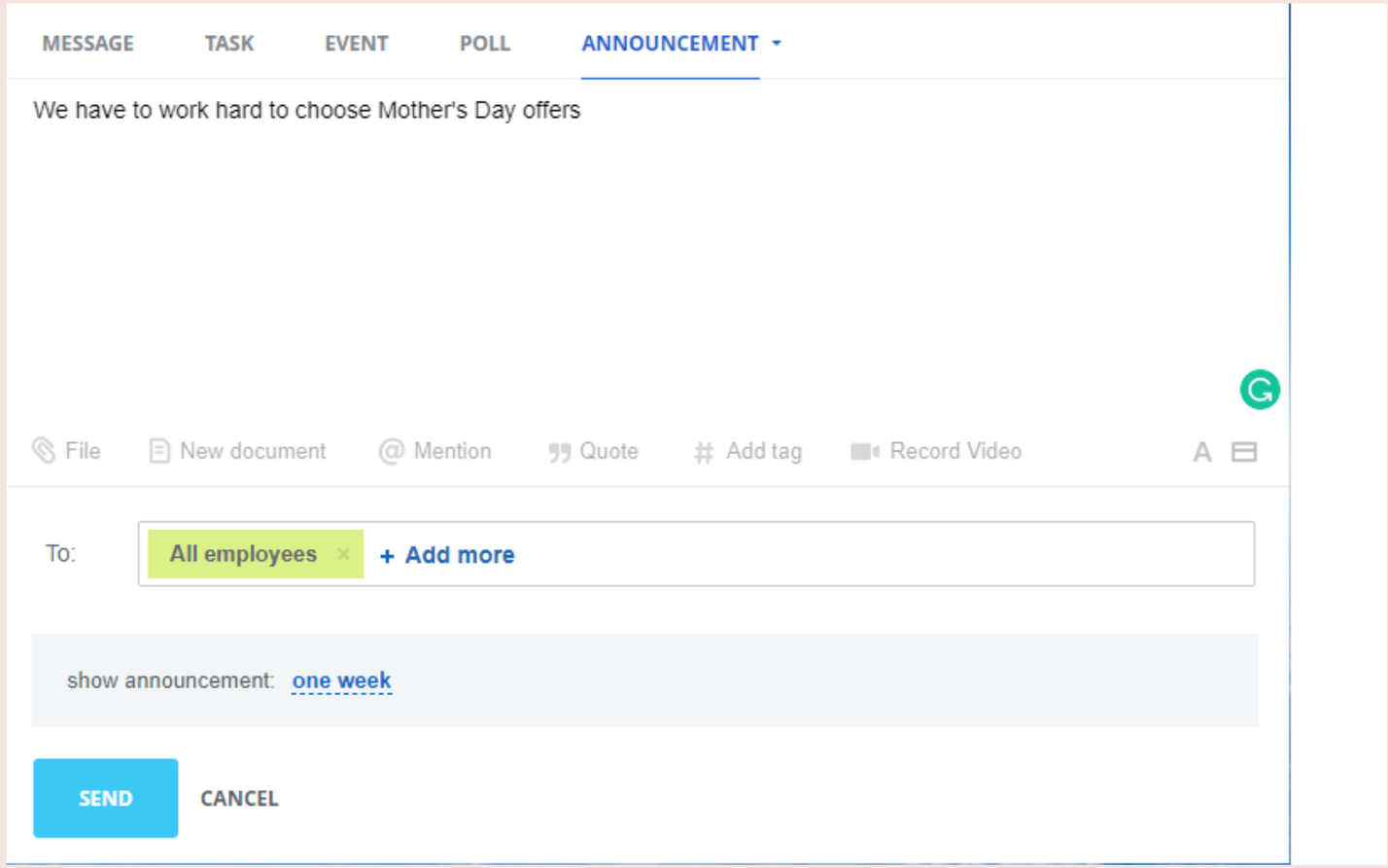
Poll


MESSAGE
TASK
EVENT
POLL
MORE
Please vote for the best time to meet
File
New document
Mention
Quote
Add tag
Record Video
To:
All employees
+ Add more
What time would you like to hold the meeting?
9 AM
10 AM
12 PM
1 PM
Answer 5
Allow multiple choice
Add question

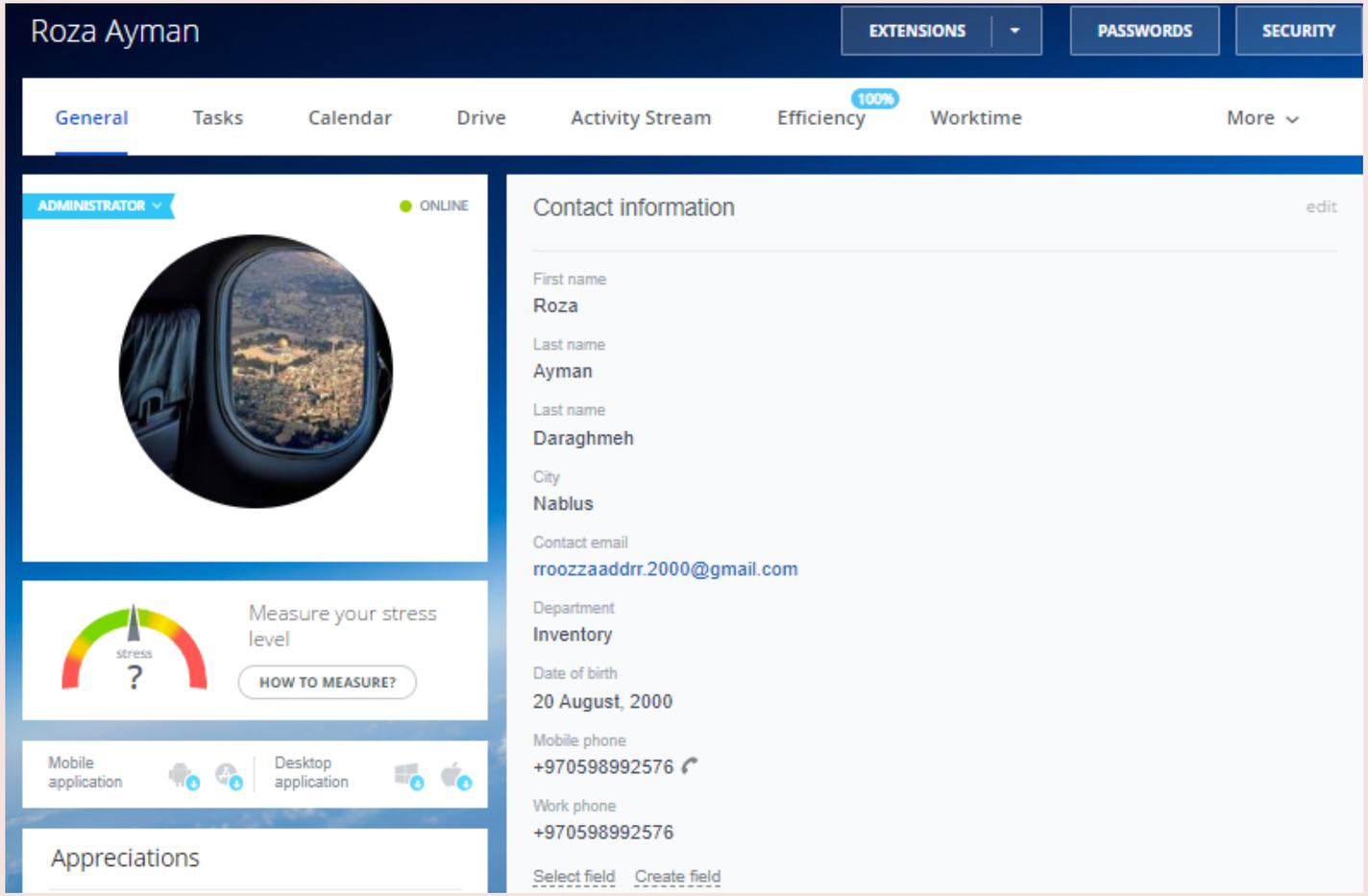
Appreciation



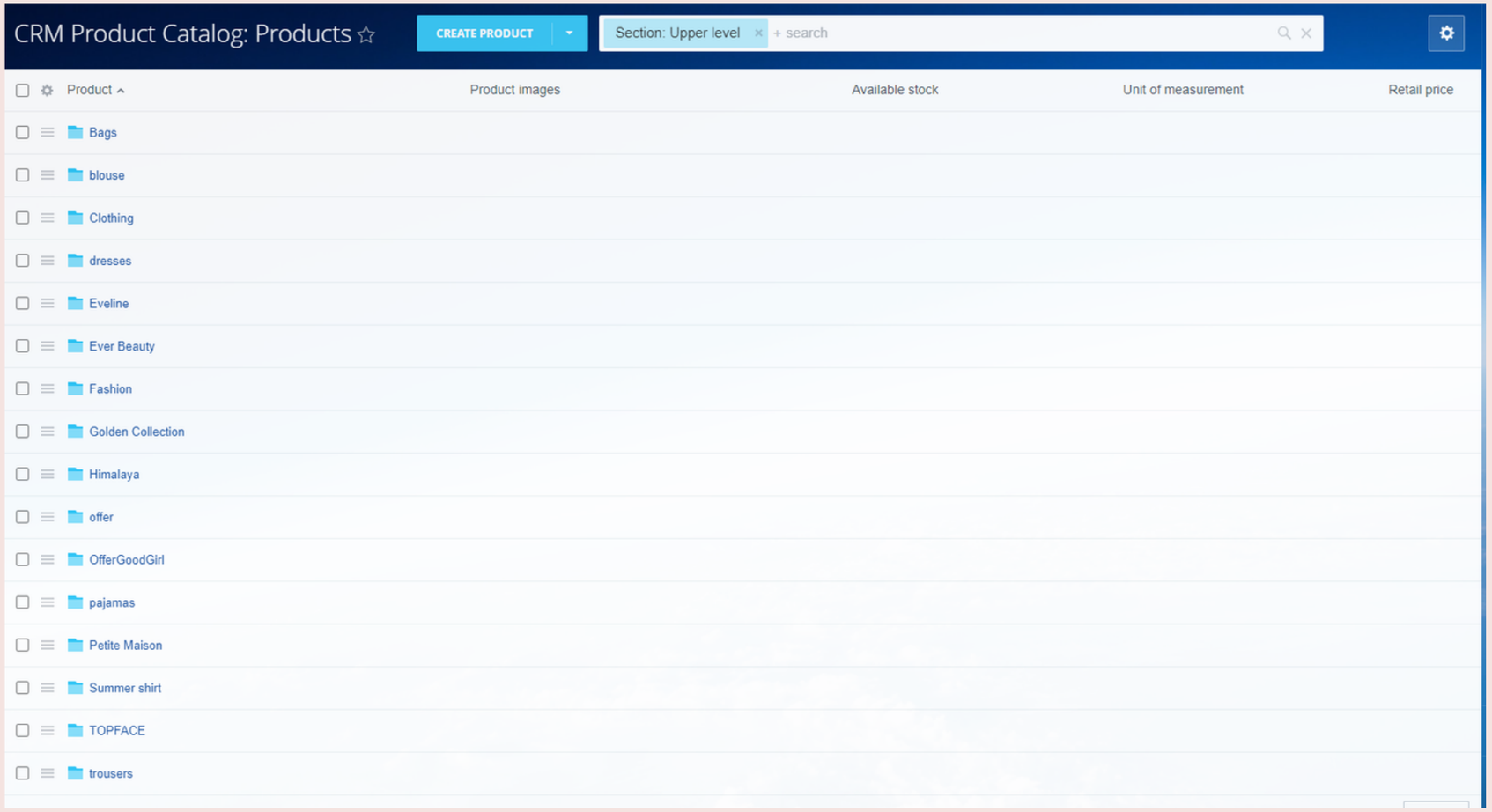
Announcement



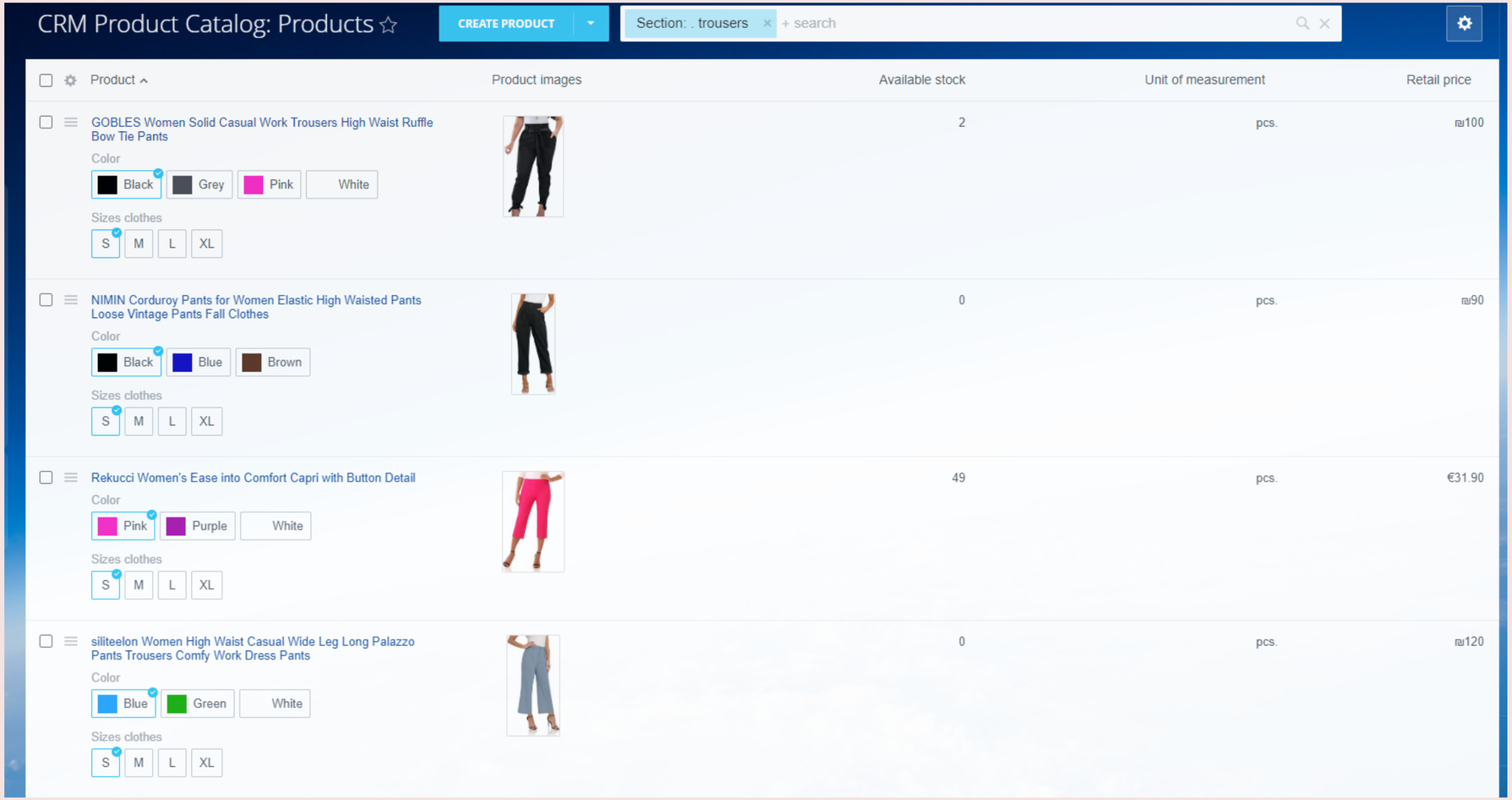
Employee profile



CRM Product Catalog: Products

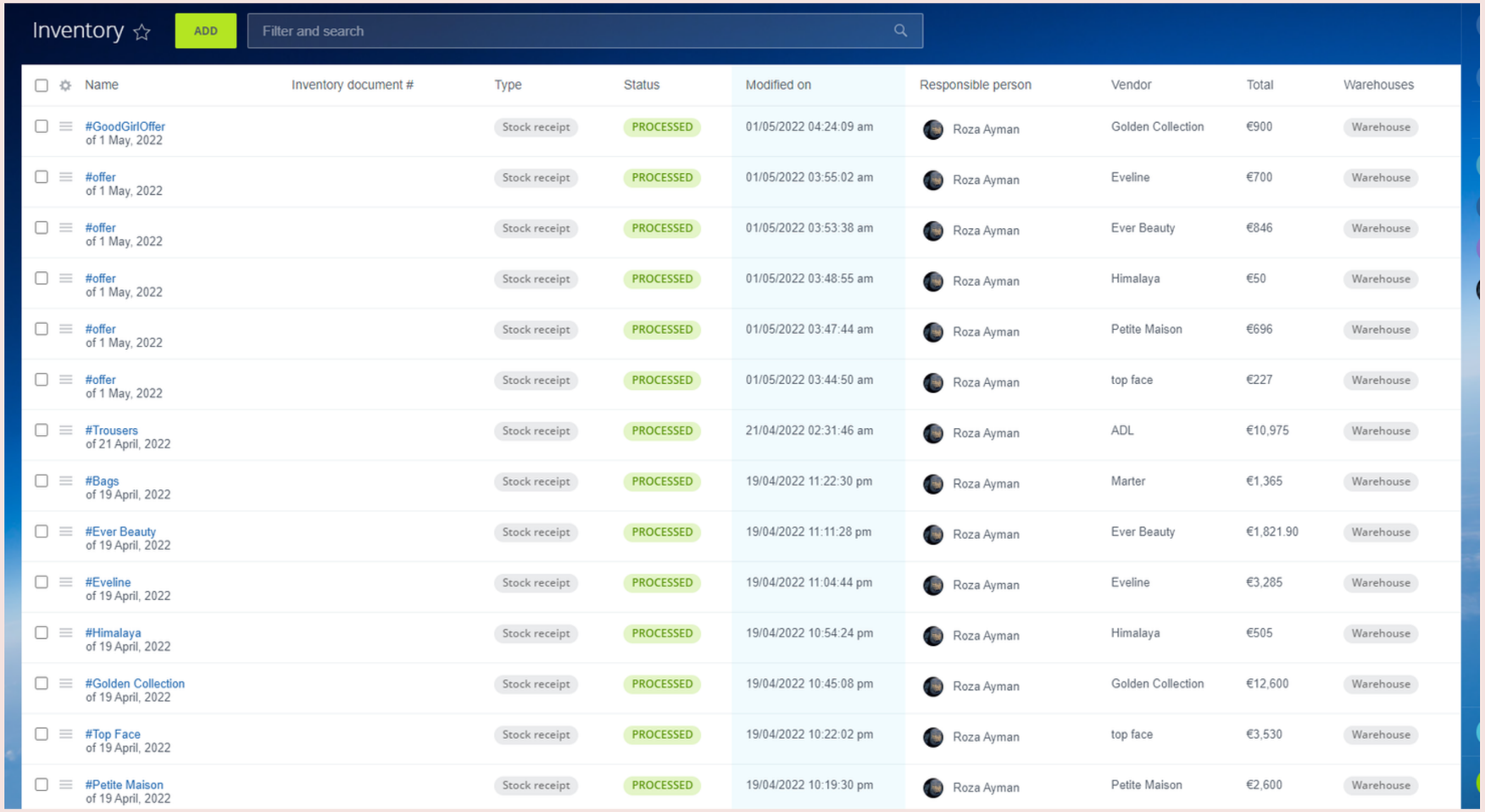


Product Catalog



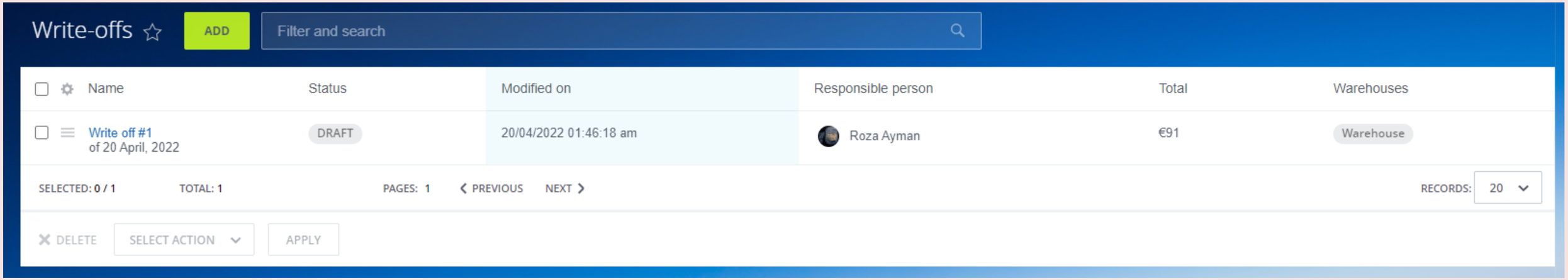
Implementation of CRM in Bitrix

Inventory

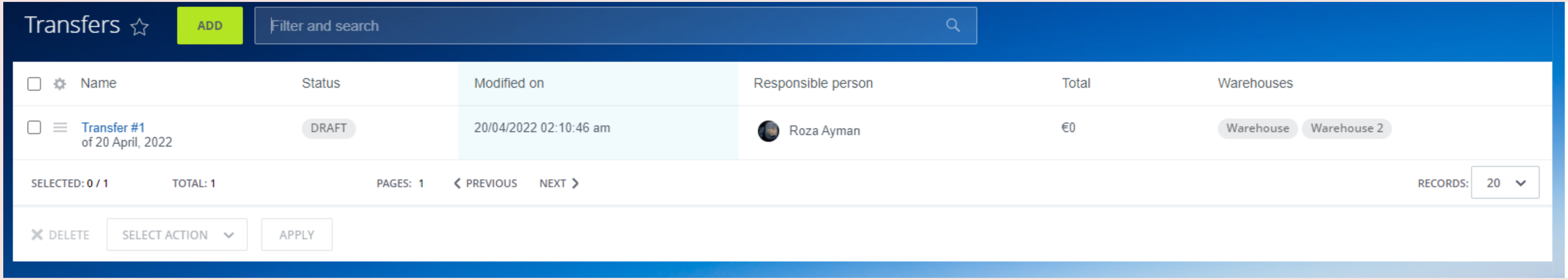


Name	Inventory document #	Type	Status	Modified on	Responsible person	Vendor	Total	Warehouses
#GoodGirlOffer of 1 May, 2022		Stock receipt	PROCESSED	01/05/2022 04:24:09 am	Roza Ayman	Golden Collection	€900	Warehouse
#offer of 1 May, 2022		Stock receipt	PROCESSED	01/05/2022 03:55:02 am	Roza Ayman	Eveline	€700	Warehouse
#offer of 1 May, 2022		Stock receipt	PROCESSED	01/05/2022 03:53:38 am	Roza Ayman	Ever Beauty	€846	Warehouse
#offer of 1 May, 2022		Stock receipt	PROCESSED	01/05/2022 03:48:55 am	Roza Ayman	Himalaya	€50	Warehouse
#offer of 1 May, 2022		Stock receipt	PROCESSED	01/05/2022 03:47:44 am	Roza Ayman	Petite Maison	€696	Warehouse
#offer of 1 May, 2022		Stock receipt	PROCESSED	01/05/2022 03:44:50 am	Roza Ayman	top face	€227	Warehouse
#Trousers of 21 April, 2022		Stock receipt	PROCESSED	21/04/2022 02:31:46 am	Roza Ayman	ADL	€10,975	Warehouse
#Bags of 19 April, 2022		Stock receipt	PROCESSED	19/04/2022 11:22:30 pm	Roza Ayman	Marter	€1,365	Warehouse
#Ever Beauty of 19 April, 2022		Stock receipt	PROCESSED	19/04/2022 11:11:28 pm	Roza Ayman	Ever Beauty	€1,821.90	Warehouse
#Eveline of 19 April, 2022		Stock receipt	PROCESSED	19/04/2022 11:04:44 pm	Roza Ayman	Eveline	€3,285	Warehouse
#Himalaya of 19 April, 2022		Stock receipt	PROCESSED	19/04/2022 10:54:24 pm	Roza Ayman	Himalaya	€505	Warehouse
#Golden Collection of 19 April, 2022		Stock receipt	PROCESSED	19/04/2022 10:45:08 pm	Roza Ayman	Golden Collection	€12,600	Warehouse
#Top Face of 19 April, 2022		Stock receipt	PROCESSED	19/04/2022 10:22:02 pm	Roza Ayman	top face	€3,530	Warehouse
#Petite Maison of 19 April, 2022		Stock receipt	PROCESSED	19/04/2022 10:19:30 pm	Roza Ayman	Petite Maison	€2,600	Warehouse

Write-offs

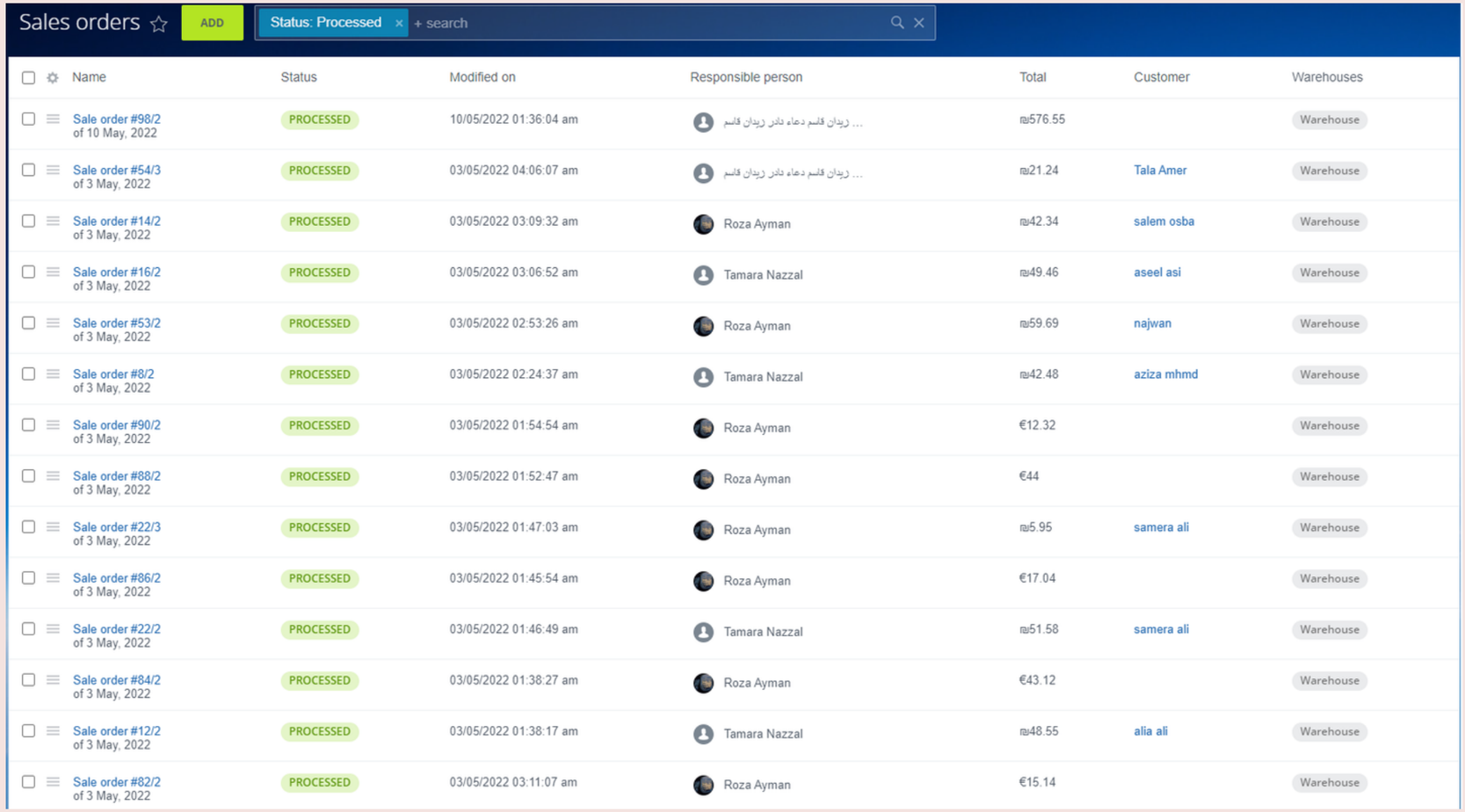

Write-offs
ADD
Filter and search
Name
Status
Modified on
Responsible person
Total
Warehouses
Write off #1
of 20 April, 2022
DRAFT
20/04/2022 01:46:18 am
Roza Ayman
€91
Warehouse
SELECTED: 0 / 1
TOTAL: 1
PAGES: 1
PREVIOUS
NEXT
RECORDS:
20
DELETE
SELECT ACTION
APPLY

Transfers


Transfers
ADD
Filter and search
Name
Status
Modified on
Responsible person
Total
Warehouses
Transfer #1
of 20 April, 2022
DRAFT
20/04/2022 02:10:46 am
Roza Ayman
€0
Warehouse
Warehouse 2
SELECTED: 0 / 1
TOTAL: 1
PAGES: 1
PREVIOUS
NEXT
RECORDS:
20
DELETE
SELECT ACTION
APPLY

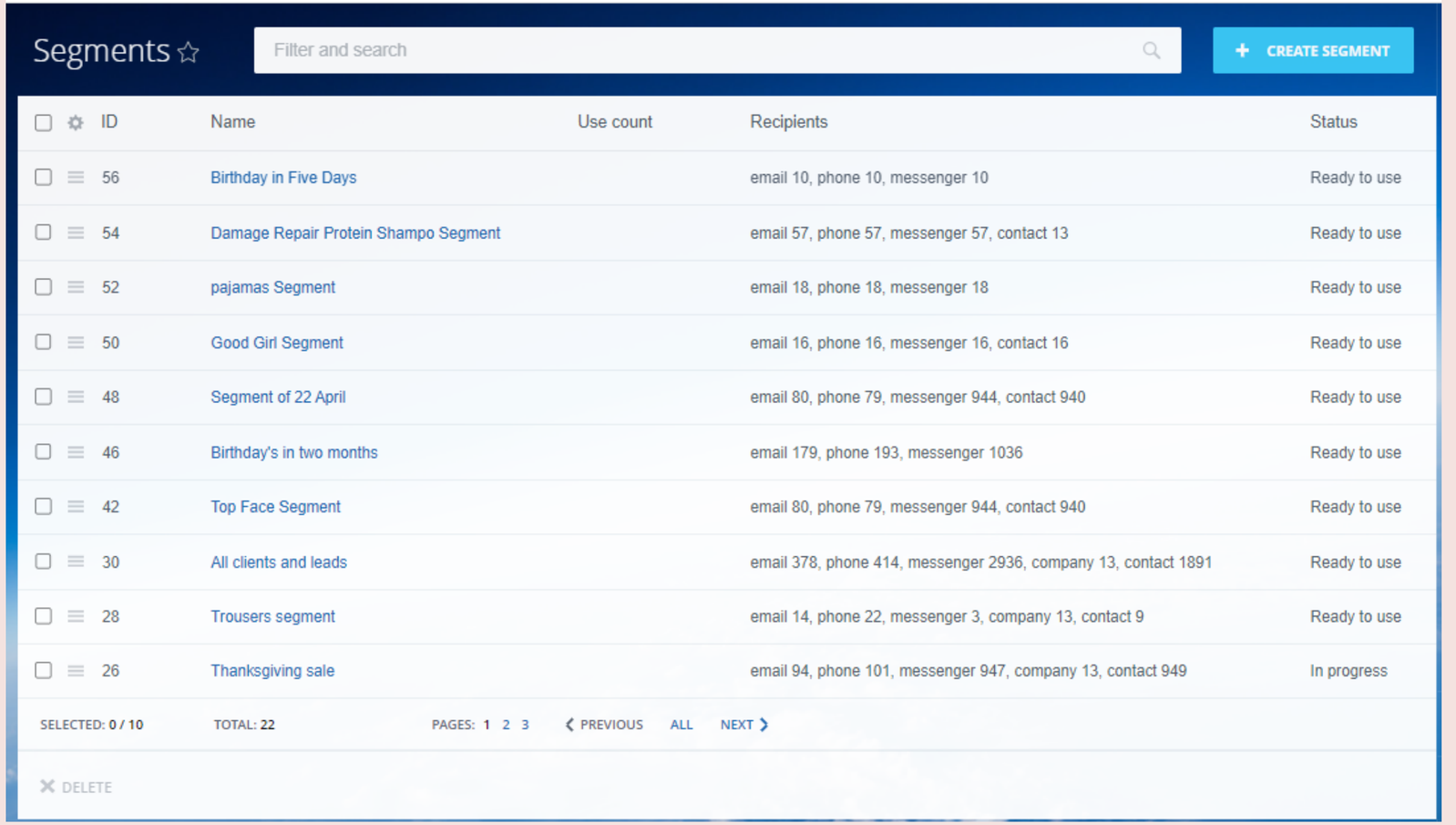
Implementation of CRM in Bitrix

Sales orders

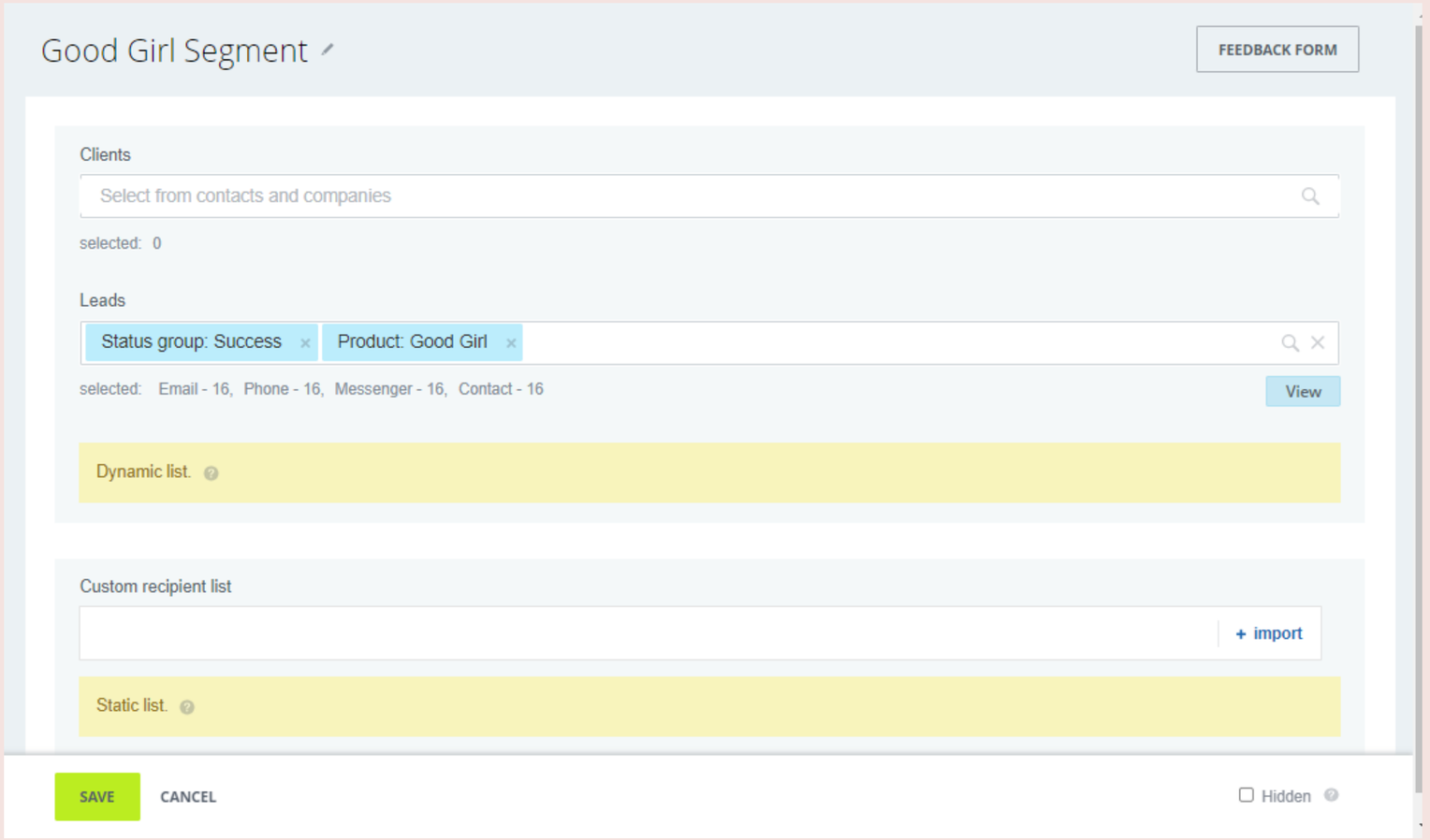


Name	Status	Modified on	Responsible person	Total	Customer	Warehouses
Sale order #98/2 of 10 May, 2022	PROCESSED	10/05/2022 01:36:04 am	زيدان قاسم دعاء دادر زيدان قاسم ...	₪576.55		Warehouse
Sale order #54/3 of 3 May, 2022	PROCESSED	03/05/2022 04:06:07 am	زيدان قاسم دعاء دادر زيدان قاسم ...	₪21.24	Tala Amer	Warehouse
Sale order #14/2 of 3 May, 2022	PROCESSED	03/05/2022 03:09:32 am	Roza Ayman	₪42.34	salem osba	Warehouse
Sale order #16/2 of 3 May, 2022	PROCESSED	03/05/2022 03:06:52 am	Tamara Nazzal	₪49.46	aseel asi	Warehouse
Sale order #53/2 of 3 May, 2022	PROCESSED	03/05/2022 02:53:26 am	Roza Ayman	₪59.69	najwan	Warehouse
Sale order #8/2 of 3 May, 2022	PROCESSED	03/05/2022 02:24:37 am	Tamara Nazzal	₪42.48	aziza mhmd	Warehouse
Sale order #90/2 of 3 May, 2022	PROCESSED	03/05/2022 01:54:54 am	Roza Ayman	€12.32		Warehouse
Sale order #88/2 of 3 May, 2022	PROCESSED	03/05/2022 01:52:47 am	Roza Ayman	€44		Warehouse
Sale order #22/3 of 3 May, 2022	PROCESSED	03/05/2022 01:47:03 am	Roza Ayman	₪5.95	samera ali	Warehouse
Sale order #86/2 of 3 May, 2022	PROCESSED	03/05/2022 01:45:54 am	Roza Ayman	€17.04		Warehouse
Sale order #22/2 of 3 May, 2022	PROCESSED	03/05/2022 01:46:49 am	Tamara Nazzal	₪51.58	samera ali	Warehouse
Sale order #84/2 of 3 May, 2022	PROCESSED	03/05/2022 01:38:27 am	Roza Ayman	€43.12		Warehouse
Sale order #12/2 of 3 May, 2022	PROCESSED	03/05/2022 01:38:17 am	Tamara Nazzal	₪48.55	alia ali	Warehouse
Sale order #82/2 of 3 May, 2022	PROCESSED	03/05/2022 03:11:07 am	Roza Ayman	€15.14		Warehouse

Segment

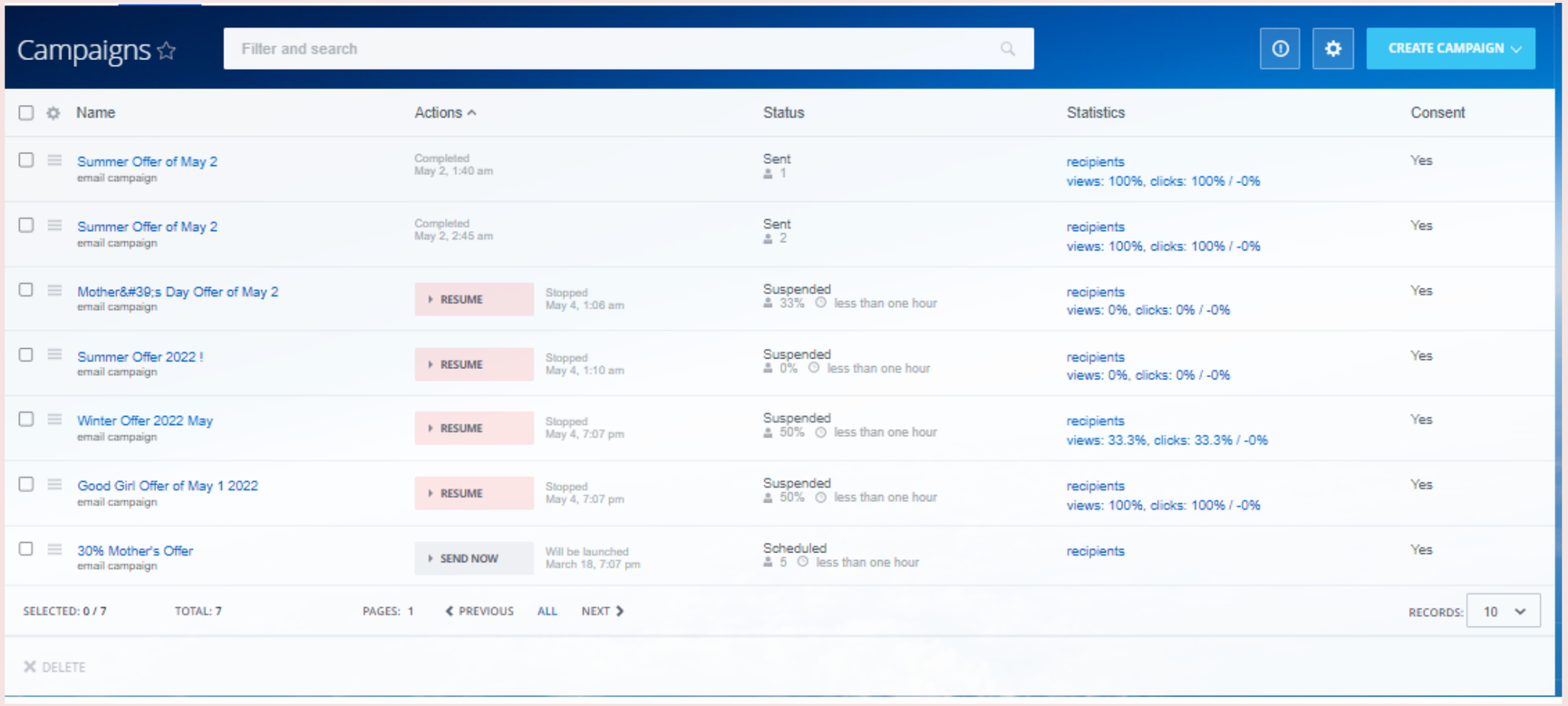

Segments
Filter and search
CREATE SEGMENT
ID
Name
Use count
Recipients
Status
56 Birthday in Five Days email 10, phone 10, messenger 10 Ready to use
54 Damage Repair Protein Shampo Segment email 57, phone 57, messenger 57, contact 13 Ready to use
52 pajamas Segment email 18, phone 18, messenger 18 Ready to use
50 Good Girl Segment email 16, phone 16, messenger 16, contact 16 Ready to use
48 Segment of 22 April email 80, phone 79, messenger 944, contact 940 Ready to use
46 Birthday's in two months email 179, phone 193, messenger 1036 Ready to use
42 Top Face Segment email 80, phone 79, messenger 944, contact 940 Ready to use
30 All clients and leads email 378, phone 414, messenger 2936, company 13, contact 1891 Ready to use
28 Trousers segment email 14, phone 22, messenger 3, company 13, contact 9 Ready to use
26 Thanksgiving sale email 94, phone 101, messenger 947, company 13, contact 949 In progress
SELECTED: 0 / 10
TOTAL: 22
PAGES: 1 2 3
PREVIOUS
ALL
NEXT
DELETE

Segment


Good Girl Segment
FEEDBACK FORM
Clients
Select from contacts and companies
selected: 0
Leads
Status group: Success
Product: Good Girl
selected: Email - 16, Phone - 16, Messenger - 16, Contact - 16
View
Dynamic list.
Custom recipient list
+ import
Static list.
SAVE
CANCEL
Hidden

Implementation of CRM in Bitrix

Campaigns



Campaigns

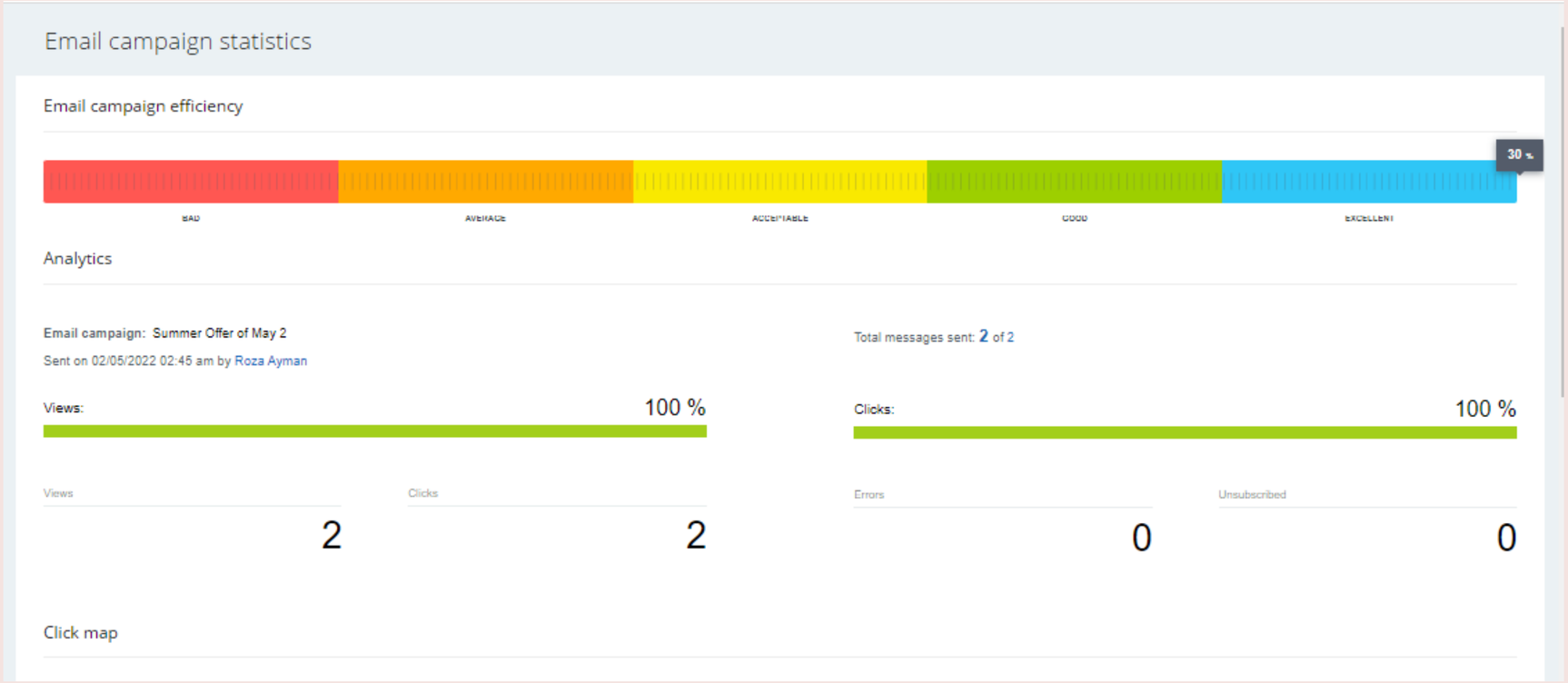
Sokkar Banat
Dear Friend ,
because this your favorite perfume , we have special offer for you
Sokkar Banat
Good Girl Perfume
20% Off
Visit our online store Click here
Golden Collection
Instagram Facebook Our site

Sokkar Banat
, Dear Friend
Because you are one of our special customers, we want you to enjoy .the discounts currently available on the occasion of Mother's Day
Sokkar Banat
30% Off Mother's Day Sale
Show your love and give Mom a treat on this special day
Enjoy major discounts from our store on March 15 to 21
You can choose any product you want.
Visit our online store Click here
Open Website
Instagram Facebook

Sokkar Banat
Dear Friend
Enjoy with our new summer collection for this season
Sokkar Banat
SUMMER OFFER
UP TO 50% OFF
Visit our online store Click here
Our Website

Sokkar Banat
Dear Friend ,
Enjoy with our new Winter collection for this season
Sokkar Banat
Winter Sale
50% Off
March 3 to 6
Visit our online store Click here
Our Website
instagram facebook

Campaigns


Email campaign statistics
Email campaign efficiency
30 %
BAD
AVERAGE
ACCEPTABLE
GOOD
EXCELLENT
Analytics
Email campaign: Summer Offer of May 2
Sent on 02/05/2022 02:45 am by Roza Ayman
Total messages sent: 2 of 2
Views:
100 %
Clicks:
100 %
Views
2
Clicks
2
Errors
0
Unsubscribed
0
Click map

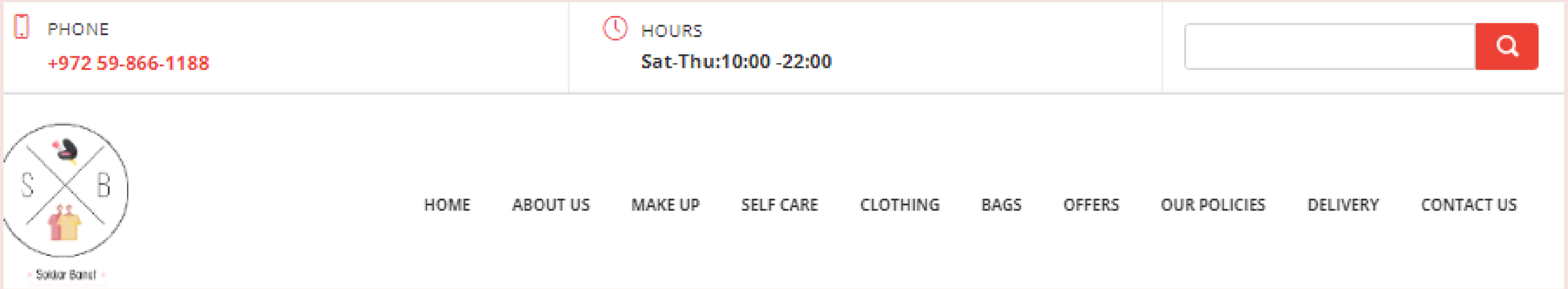
Campaigns

Sokkar Banat
SUMMER OFFER
UP TO
50% OFF
Visit our online store Click here
100%
instagram
facebook
You are receiving this message because you have previously registered with us as our customer. Please click here if you no longer want to receive emails from us.

Sokkar Banat
Good Girl Perfume
20% Off
Visit our online store Click here
25%
25%
25%

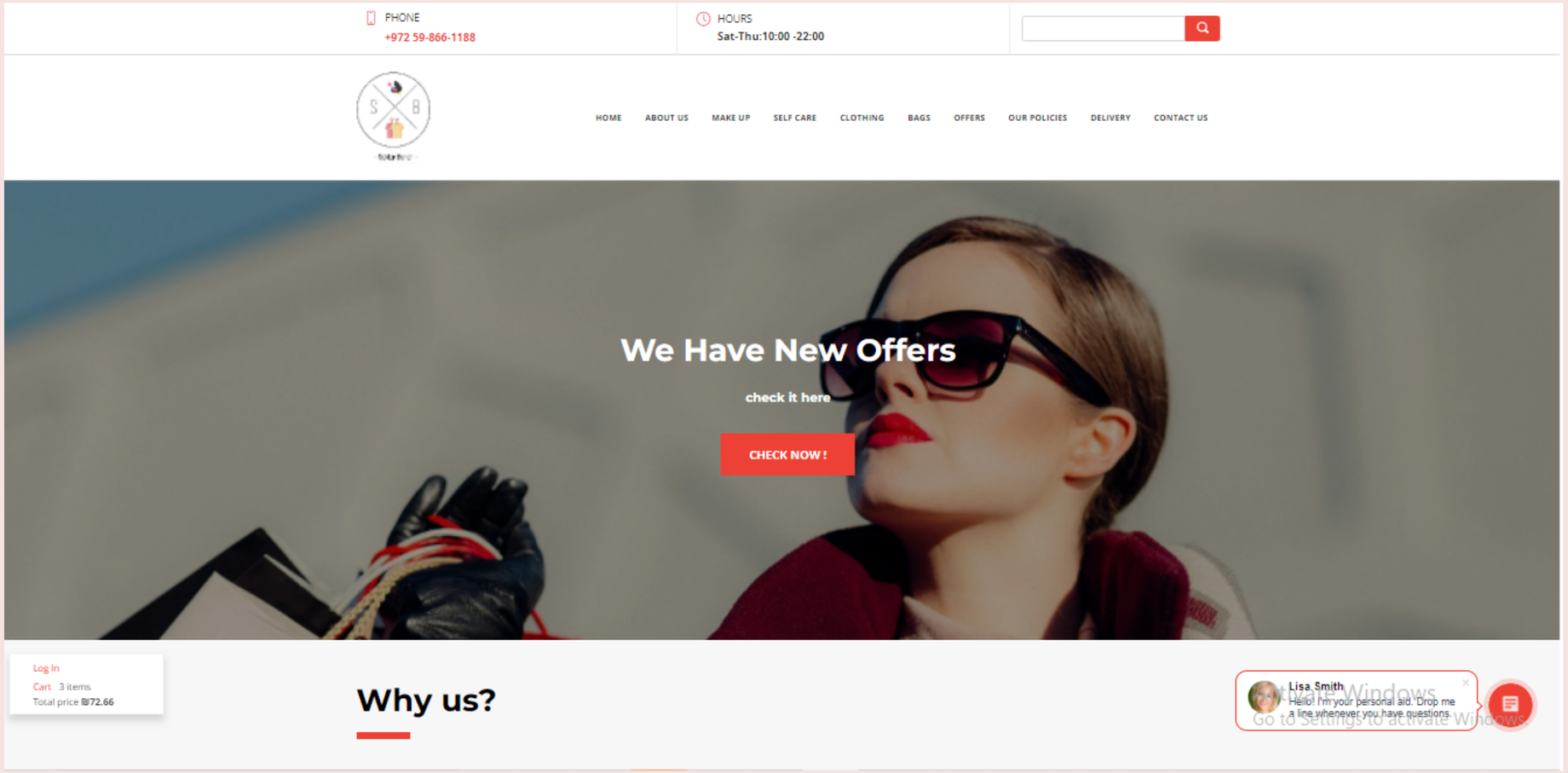
Online Store

Header



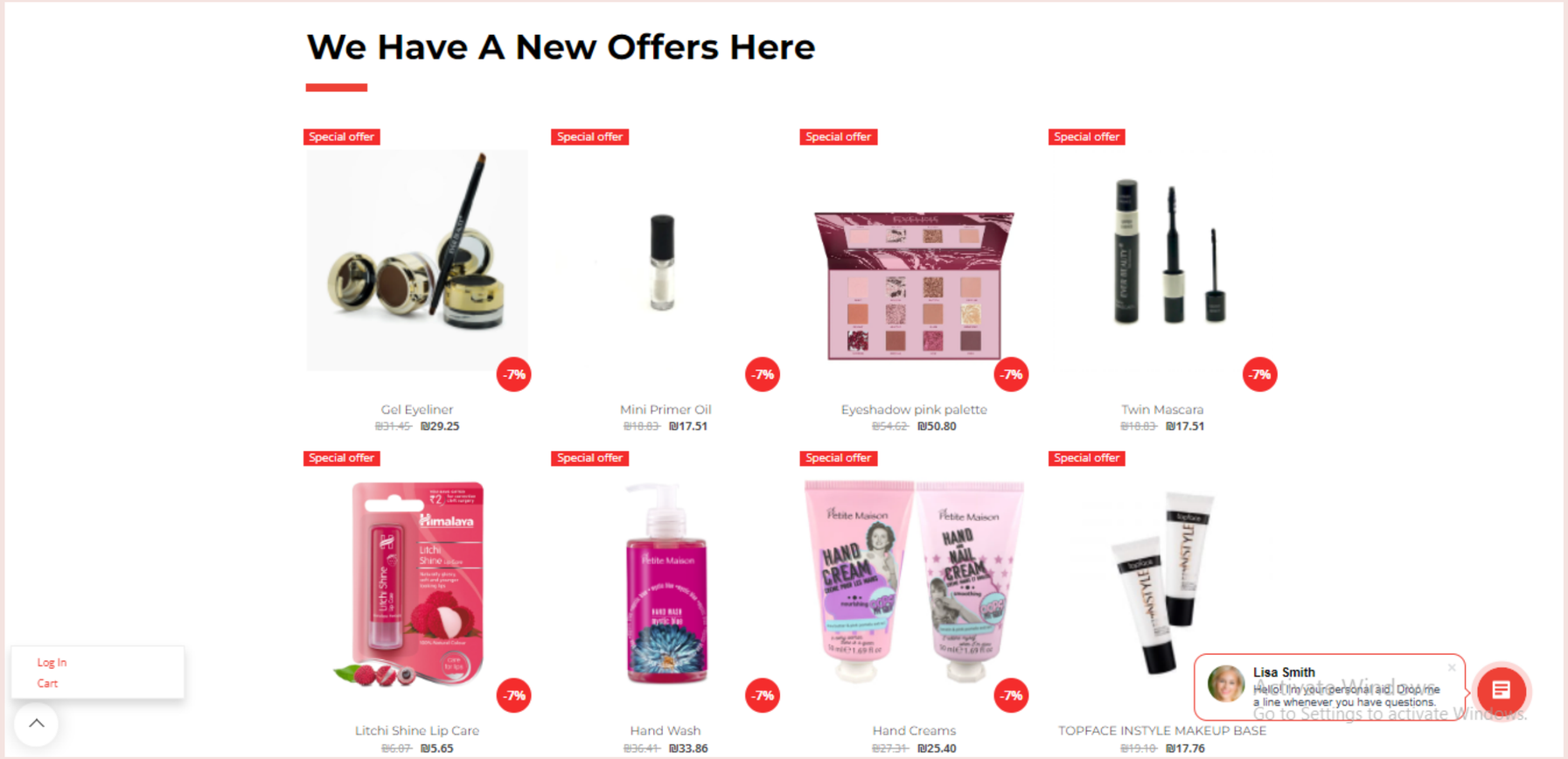
4 Solution

Body



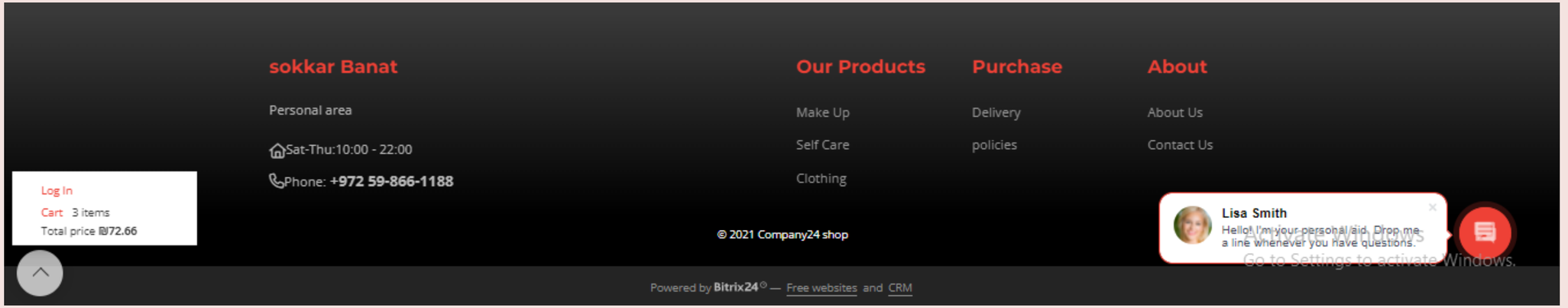
4 Solution

Offer

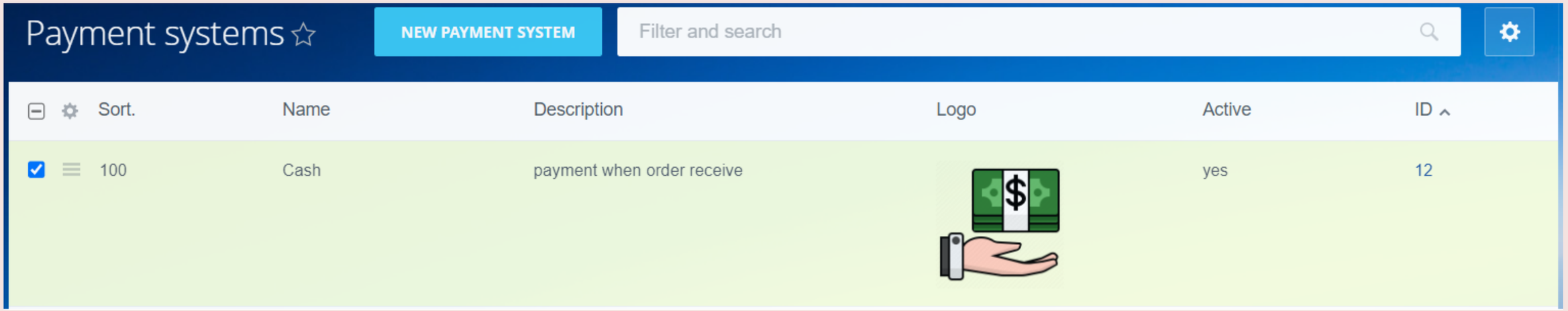


4 Solution

Footer



Payment System

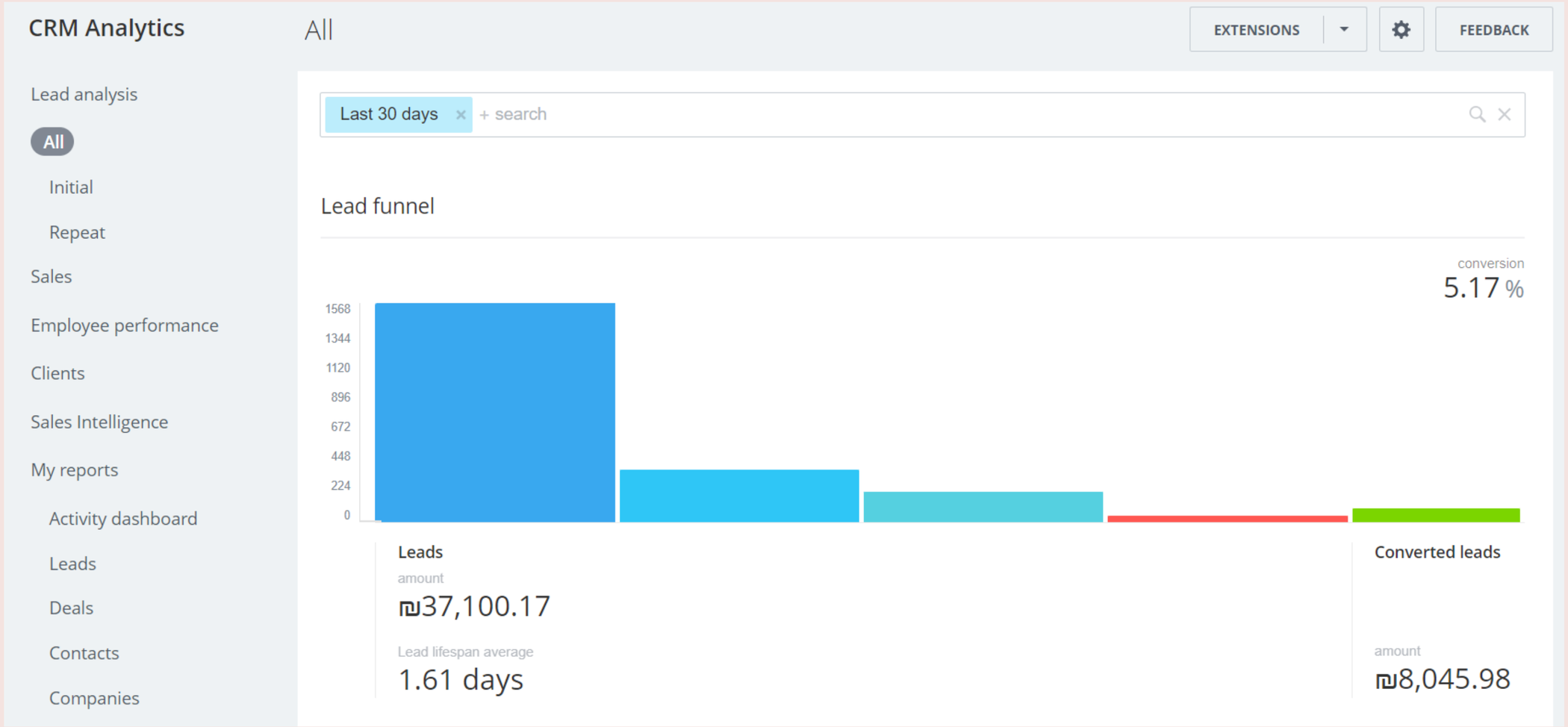


Delivery services

Delivery services ☆ ADD Filter and search

	Name	Description	Logo	Group	ID	Sort	Active
☐	Delivery service	Delivery being from two to three days days and the delivery cost 20 ILS			2	100	Yes
☐	Local pickup	You can take your order from our store.			4	200	Yes
☐	Custom delivery service	If your order price equal or more than 300 the delivery cost will be 15 ILS			8	100	Yes
☐	Free delivery service	If the total of your order equal or more than 500 ILS the delivery cost will be free			10	100	Yes

CRM Analytics

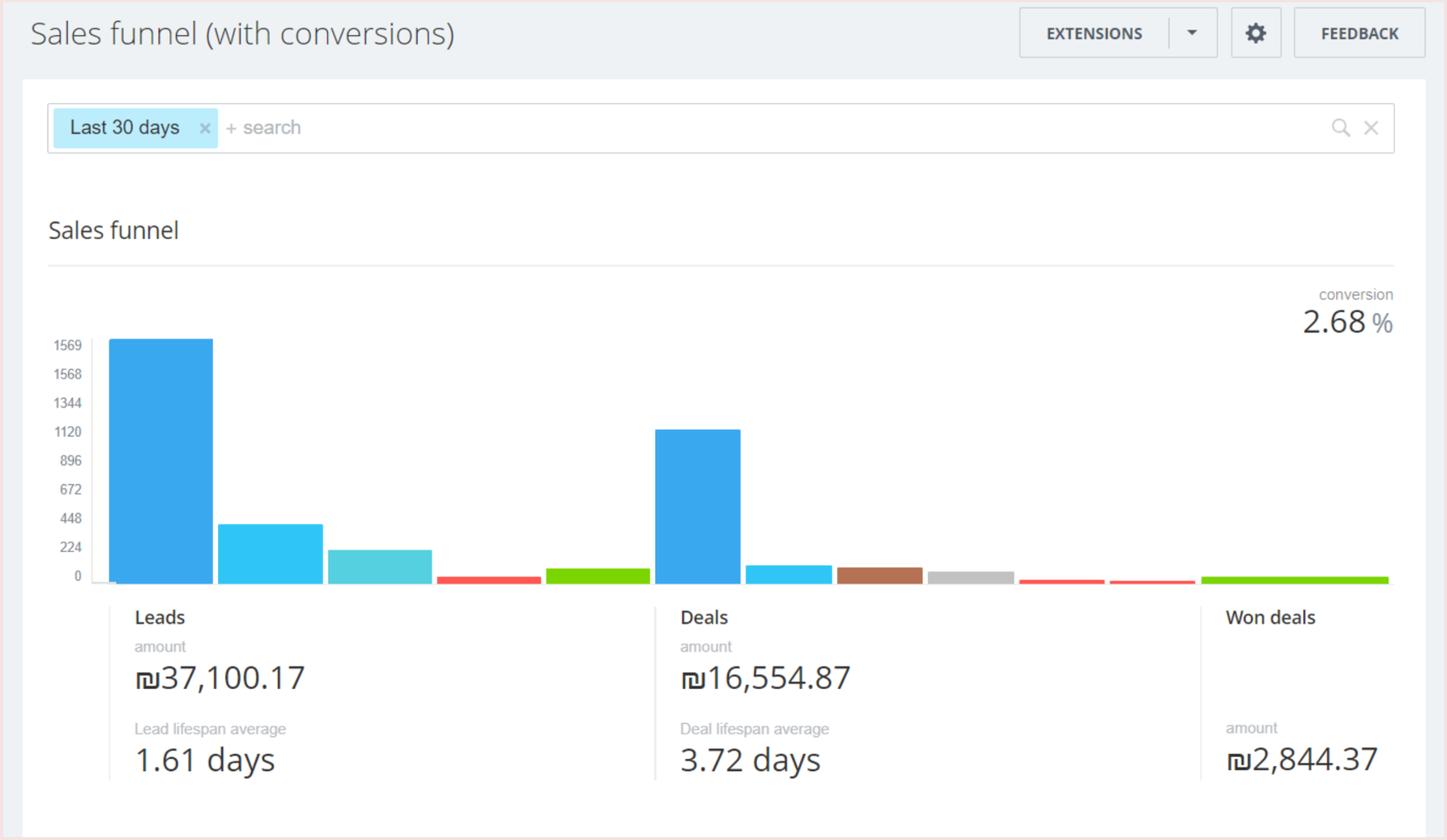


Employee performance

Employee performance

Manager	Active	Converted	Junk leads	Lost	Conversion
Roza Ayman	1365	43	9	0.66%	3.15%
Tamara Nazzal	80	21	1	1.25%	26.25%
دعاء نادر زيدان قاسم دعاء نادر زيدان قاسم	123	17	14	11.38%	13.82%
Total:	1568	81	24	1.53%	5.17%

Sales funnel (with conversions)

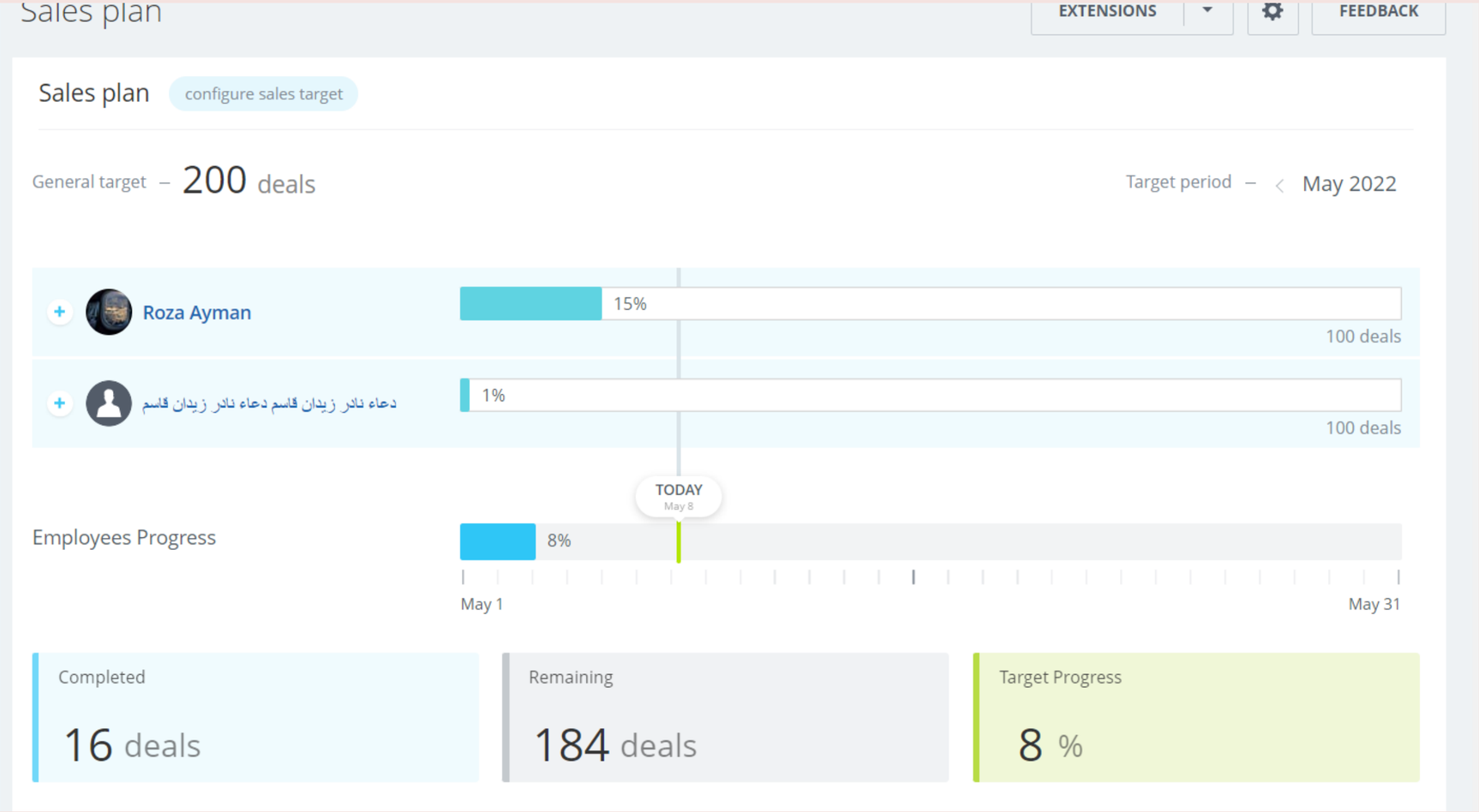


Employee performance

Employee performance

Manager	Number of leads	Number of deals	Deals lost	Deals total	Deals won	Deals won amount
Roza Ayman	1366	920	3	₪5,035.06	21	₪2,031.18
Tamara Nazzal	80	21	1	₪3,142.08	4	₪561.34
دعاء نادر زيدان قاسم دعاء نادر زيدان قاسم	123	21		₪2,761.04	1	₪251.85

Sales Plan

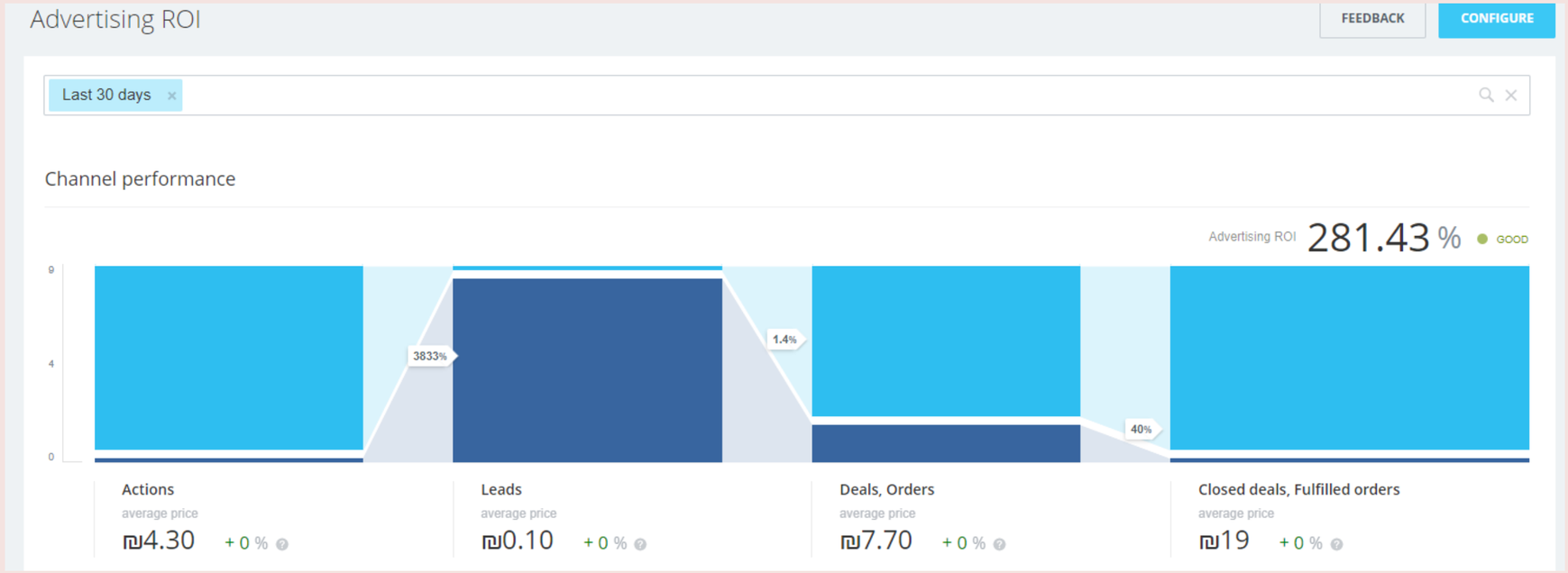

Sales plan
EXTENSIONS
FEEDBACK
Sales plan
configure sales target
General target – 200 deals
Target period – May 2022
Roza Ayman
15%
100 deals
دعاء نادر زيدان قاسم دعاء نادر زيدان قاسم
1%
100 deals
TODAY
May 8
Employees Progress
8%
May 1
May 31
Completed
16 deals
Remaining
184 deals
Target Progress
8 %

Sales intelligence

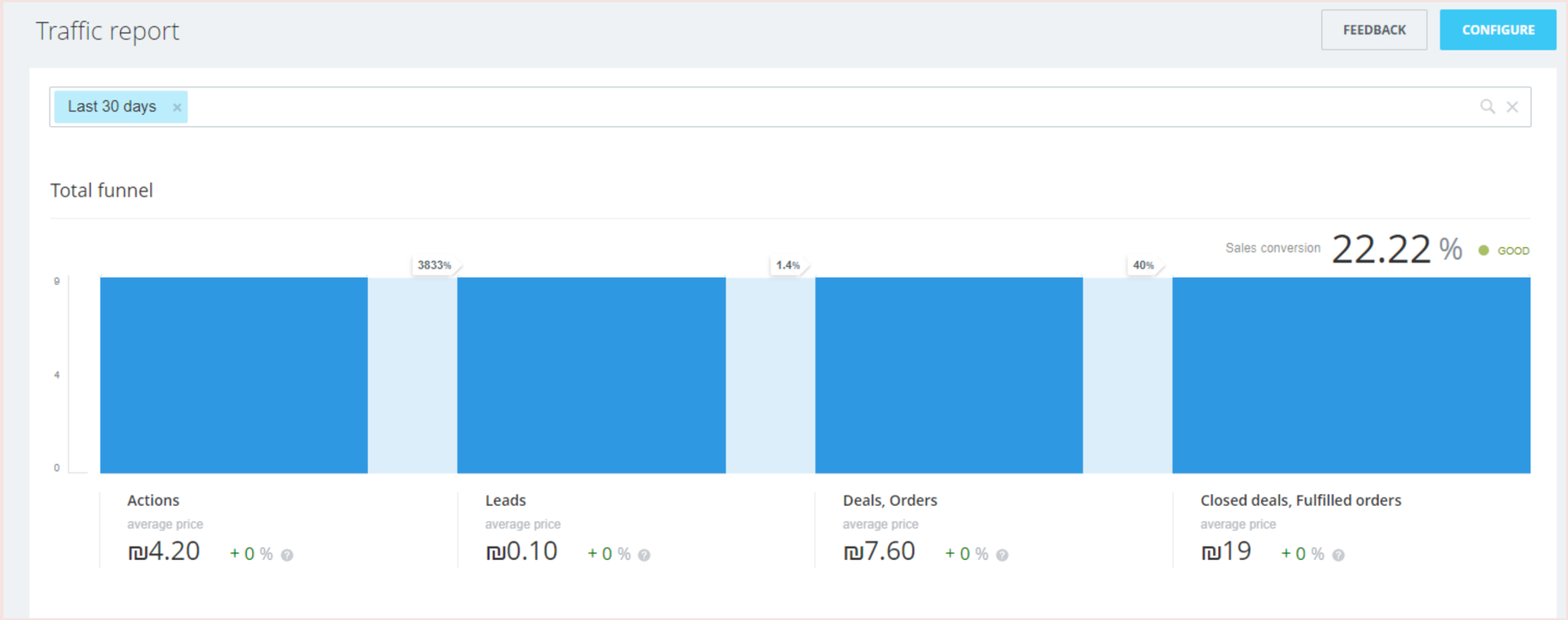
Advertising ROI

Traffic ROI

Source	Color	Costs	Views	Actions	Leads	Deals, Orders	Won	Conversion, %	Profit	ROI
Email Marketing		₪38.45 add	5	9	0	4 - Orders	2 - Orders	22.22%	₪146.66	281.43% GOOD
Facebook details		₪0 add	0	0	345	1 - Deals	0	0	₪0	NONE
Brought by traffic source		**₪38.45**	**5**	**9**	**345**	**5**	**2**	**0.56%**	**₪146.66**	281.43% GOOD
Other traffic		₪0	0	0	299	145 - Total 108 - Deals 10 - Orders 27 - Orders	40 - Total 26 - Deals 14 - Orders	13.38%	₪5,693.58	
Total		**₪38.45**	**5**	**9**	**644**	**150**	**42**		**₪5,840.24**	15089.18% GOOD



Traffic Report

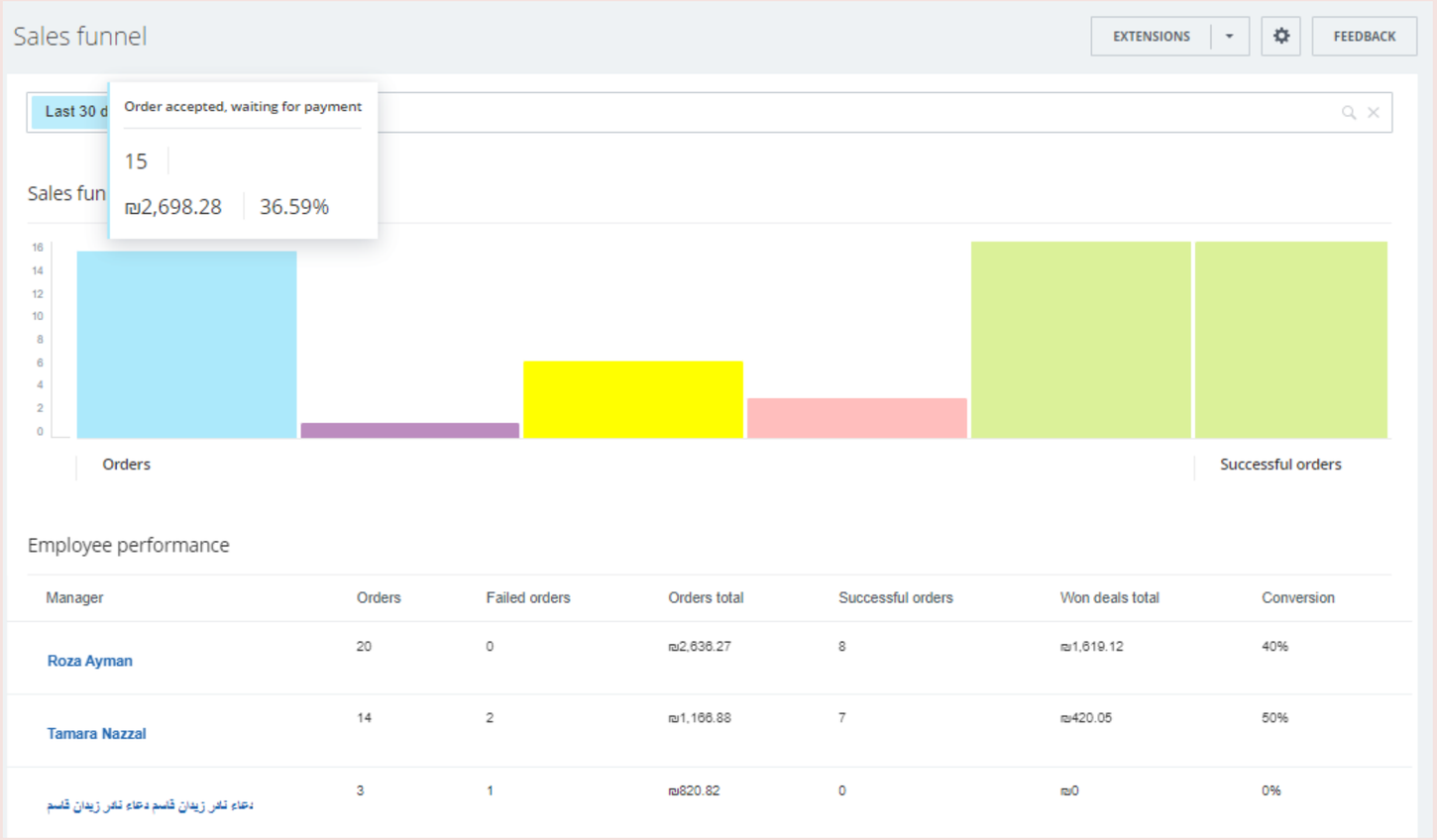


Employee Traffic Distribution

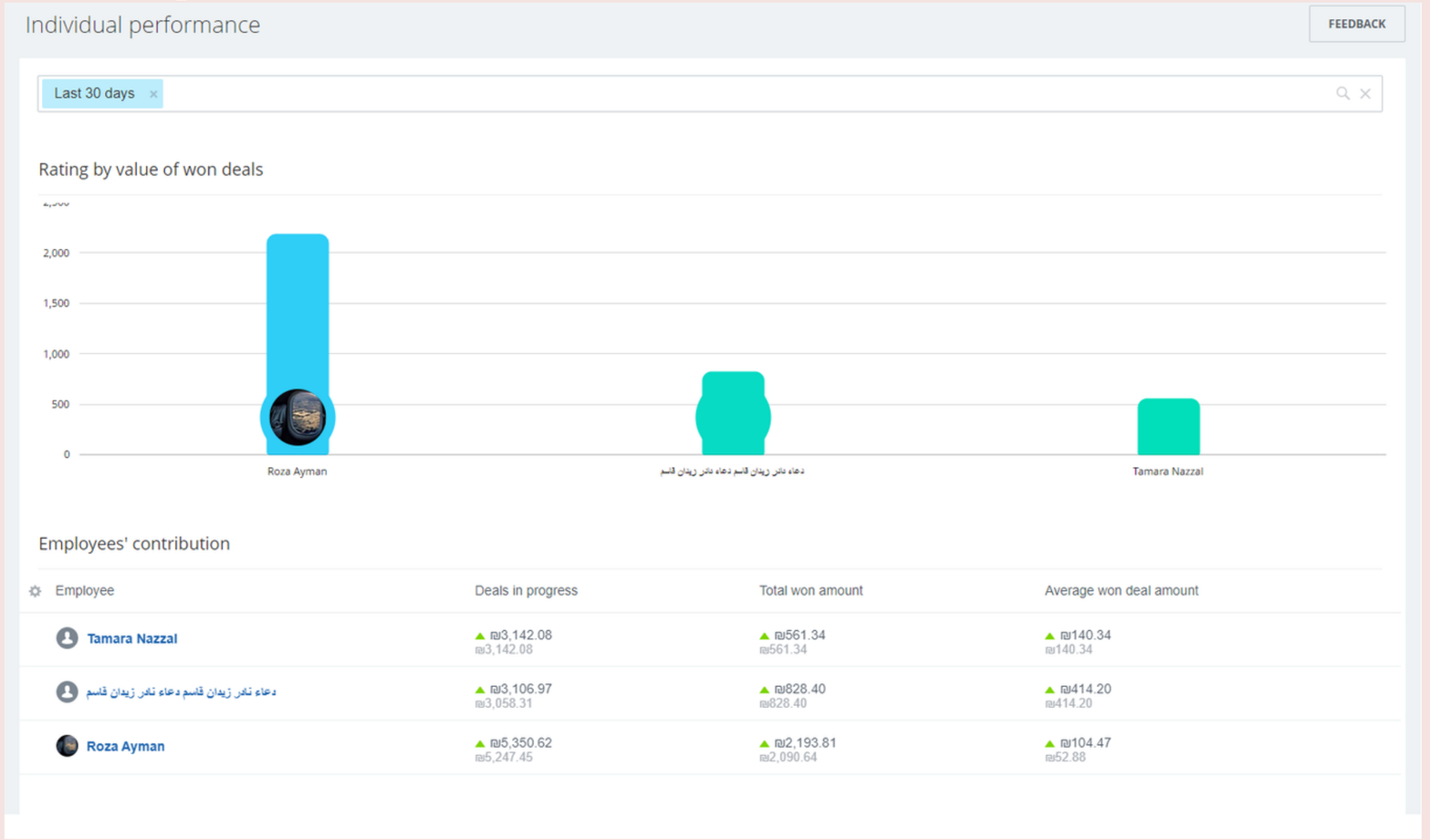
Employee traffic distribution

Source	Leads	Deals, Orders	Won	Conversion, %	Profit
Roza Ayman	**564**	**80**	**28**		**₪3,770.45**
Facebook details	294	1 - Deals	0	NONE	₪0
Other traffic	270	78 - Total 59 - Deals 8 - Orders 11 - Orders	27 - Total 20 - Deals 7 - Orders	10% | GOOD	₪3,664.13
Email Marketing	0	1 - Orders	1 - Orders	100% | GOOD	₪106.32
Tamara Nazzal	**54**	**35**	**11**		**₪981.39**
Facebook details	25	0	0	NONE	₪0
Other traffic	29	33 - Total 21 - Deals 2 - Orders 10 - Orders	10 - Total 4 - Deals 6 - Orders	34.48% | GOOD	₪941.05
Email Marketing	0	2 - Orders	1 - Orders	50% | GOOD	₪40.34
دعاء نادر زيدان قاسم دعاء نادر زيدان قاسم	**26**	**23**	**2**		**₪828.40**
Facebook details	26	0	0	NONE	₪0
Other traffic	0	23 - Total 20 - Deals 3 - Orders	2 - Deals	8.7% | GOOD	₪828.40
Email Marketing	0	0	0	NONE	₪0
	0	**6**	**0**		**₪0**

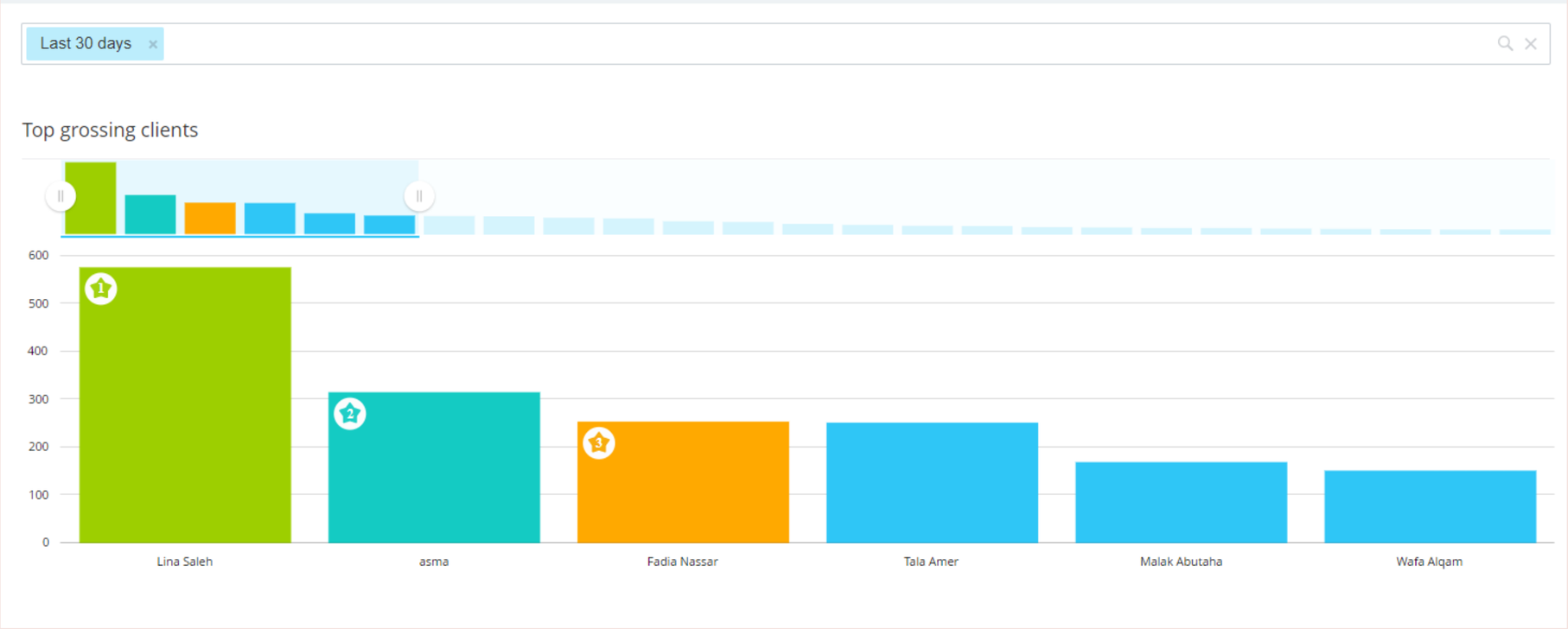
Online Store Analysis



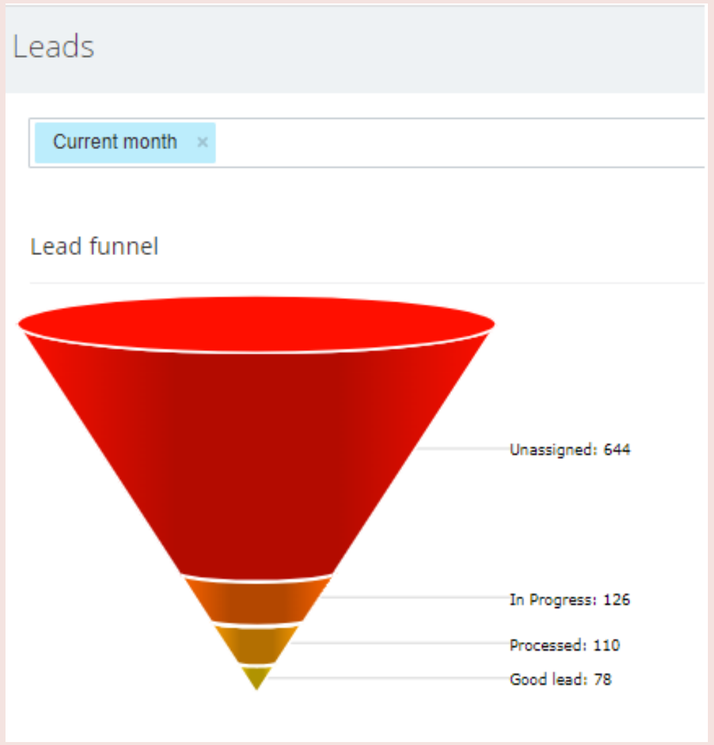
Individual performance

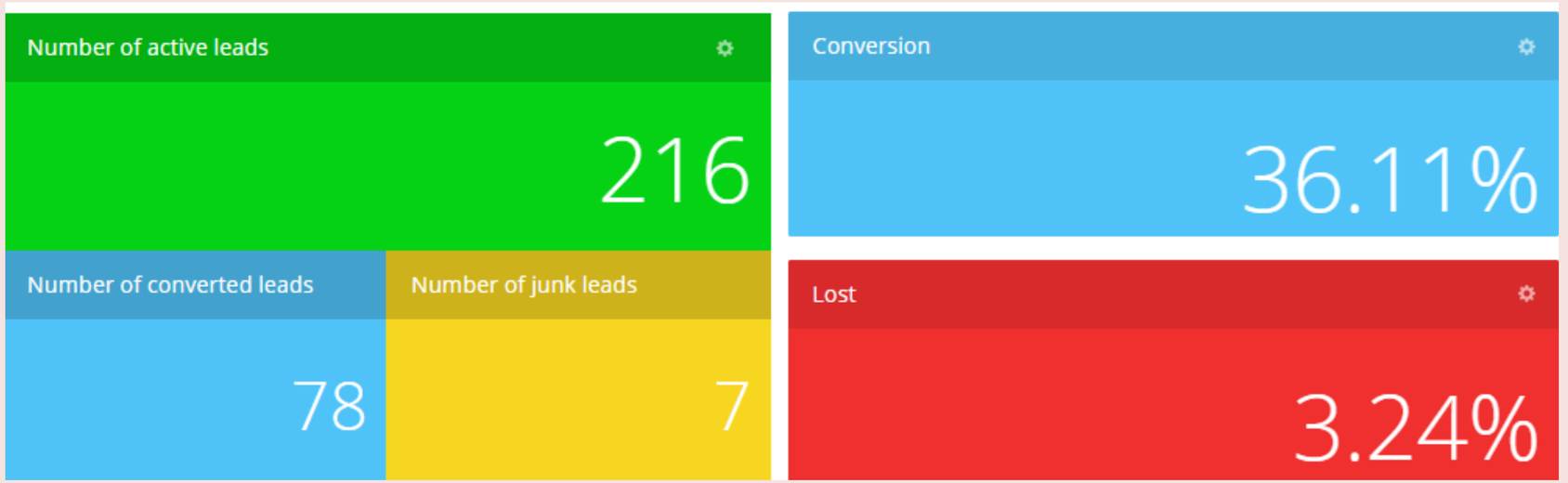


Top Grossing clients

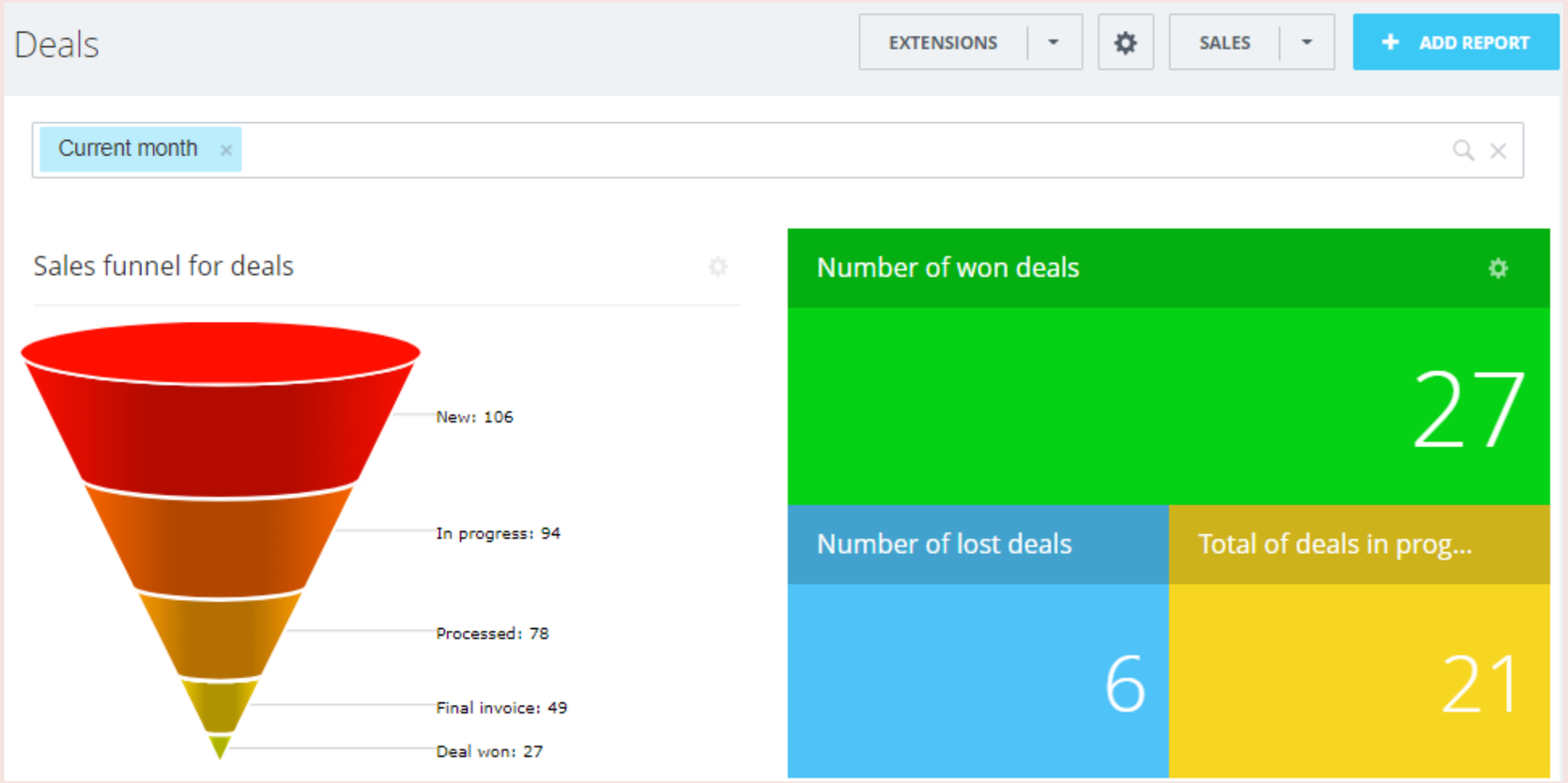


My Report "Lead"

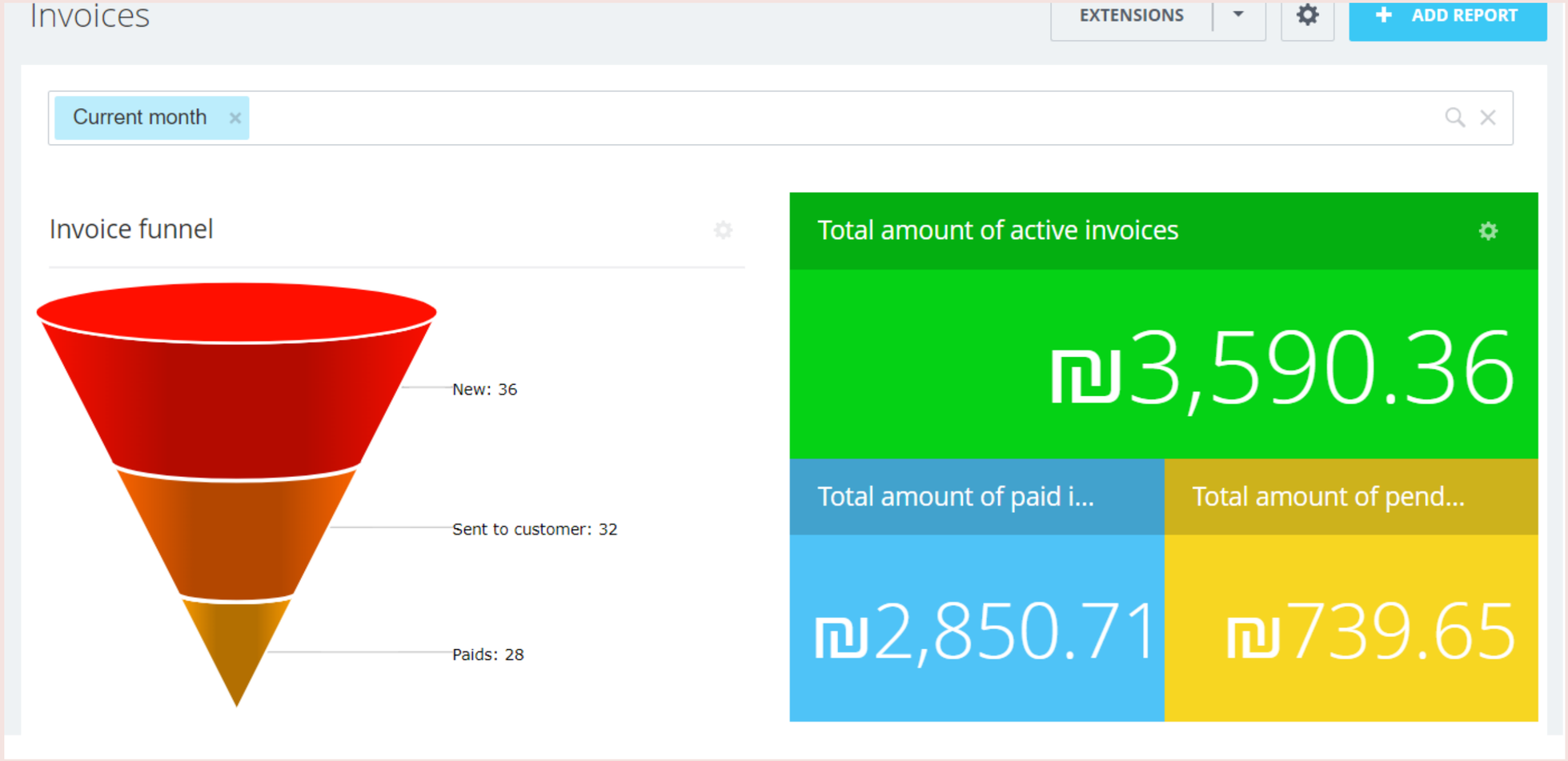




My Report "Deal"



My Report "Invoice"



5 Tools We Used

Bitrix24

Fanpage Karma

Social Insider

Thank you for listening