



CRM

CRM

SO per Client

Class One

We answer the following question:

Which clients have made me Events?

Being able to filter by:

- Dates
- Status
- Halls
- Type of Service Order
- Segments

The screenshot displays the CRM interface with a sidebar on the left and a main table of events. The sidebar contains a search bar, a date range filter (Date From: 02/01/2019, Date To: 02/01/2020), and a list of filters: All, Pending, Accepted, Budgeted, Attempted, Completed, Failed, and Sales as billed. Below these are two dropdown menus for 'Types' and 'Segments', both currently set to 'All'. Two modal windows are open over the table. The 'Choose Types' modal shows a grid of event types including WEDDINGS OFFSITE GROUPS, WEDDINGS IN-HOUSE, REUNION/ALQUILER DE SALON, BLESSINGS KL, GRUPOS, HEN PARTIES, WEDDING CIS, WEDDING AGENTS, BLESSINGS CIS, BLESSINGS IN-HOUSE, COMUNIONES, SHOWS MOONLIGHT, WEDDING BWS, DAY AFTER BBQ, BODAS ESPAÑOLAS, CELEBRACIONES AGENTS, CELEBRACIONES, EVENTOS SBC, WEDDING KL, and CELEBRACIONES LUNA. The 'Choose Segment' modal shows a grid of segments including WEB, CASA, FBD, REDES SOCIALES, REFERRAL, BWS, NETWORKING, ROADSHOW, AGENT, FAIR, KL, REPEAT, STAFF, WALKIN, OPEN DAY, OTHER, HOTEL, EMAIL, PHONE, and CIS. Both modals have a green checkmark button at the bottom. The main table lists events with columns: Type, Client, # Events, Pax, Children, Amount, Avg amount, Phone, E-mail, and Last exec. date. The table is filtered to show events from 2019-01-10 to 2019-10-04.

Type	Client	# Events	Pax	Children	Amount	Avg amount	Phone	E-mail	Last exec. date
Events		1	0	0	0.00	0.00			2019-12-31
Events	AG	1	20	0	0.00	0.00			2019-01-10
Events	Alb	2	68	18	2,818.00	1,409.00	+34	albe	2019-04-27
Events	Alc	1	0	0	600.00	600.00	+44	alex	2019-03-04
Events	Alc	1	50	0	0.00	0.00			2019-09-26
Events	An	1	2	0	0.00	0.00	+34	ana	2019-07-14
Events	An	1	30	0	100.00	100.00	600	info	2019-04-22
Events	AN	1	40	11	1,576.00	1,576.00		jean	2019-06-28
Events	AN	1	41	0	700.00	700.00	+44	and	2019-02-24
Events	An	1	0	0	0.00	0.00		ann	2019-05-18
Events	AR	1	0	0	0.00	0.00			2019-12-23
Events	AS	1	4	0	0.00	0.00	00+	ann	2019-09-26
Events	AY								2019-01-17
Events	BE								2019-07-20
Events	AY								2019-01-27
Events	BA								2019-10-27
Events	BA								2019-12-21
Events	BA								2019-07-28
Events	Be								2019-05-05
Events	BE								2019-06-26
Events	BE								2019-05-11
Events	BE								2019-04-10
Events	BE								2019-06-26
Events	BE								2019-10-19
Events	BE								2019-06-29
Events	BE								2019-04-24
Events	BE								2019-03-30
Events	BE								2019-05-31
Events	BE								2019-10-04

Sales by Client



We answer the following question:

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Question: How many Events?

Type	Client	Units	Amount	Avg amount	Phone	E-mail
Events	STON (CIS)	24.00	1,236.00	54.00		
Events	(CIS)	24.00	1,236.00	54.00		
Events	Y (CIS)	7.00	378.00	54.00		
Total:		55.00	2,970.00	54.00		

Halls per Client



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- Status
- Halls
- Type of Service Order
- Segments

Main menu / CRM / Halls per client
User: admin1

Date From

Date To

Hall

PANORAMA

☐ All

☒ Pending

☒ Accepted

☒ Budgeted

☒ Attempted

☒ Completed

☐ Failed

☐ Sales as billed

Types

Segments

Type	Client	Units	Length(h)	Avg length(h)	Pax	Children	Amount	Avg amount(h)	Phone	E-mail
Events	Panorama	1	1.00	1.00	150	0	0.00	0.00	+44 1234 56789	paul@panorama.co.uk
Events	Royal Opera House Roll 4	1	0.50	0.50	50	0	0.00	0.00	+34 91 123 4567	joe@operahouse.co.uk
Events	Sales	4	18.00	4.50	140	0	0.00	0.00	+44 1234 56789	shirley@panorama.co.uk
Events	Tickets	1	0.75	0.75	80	0	0.00	0.00	+35 123 456789	lpc@operahouse.co.uk
y - Total:		7	20.25	2.89	420	0	0.00	0.00		

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