

Moffice CRM Competitors

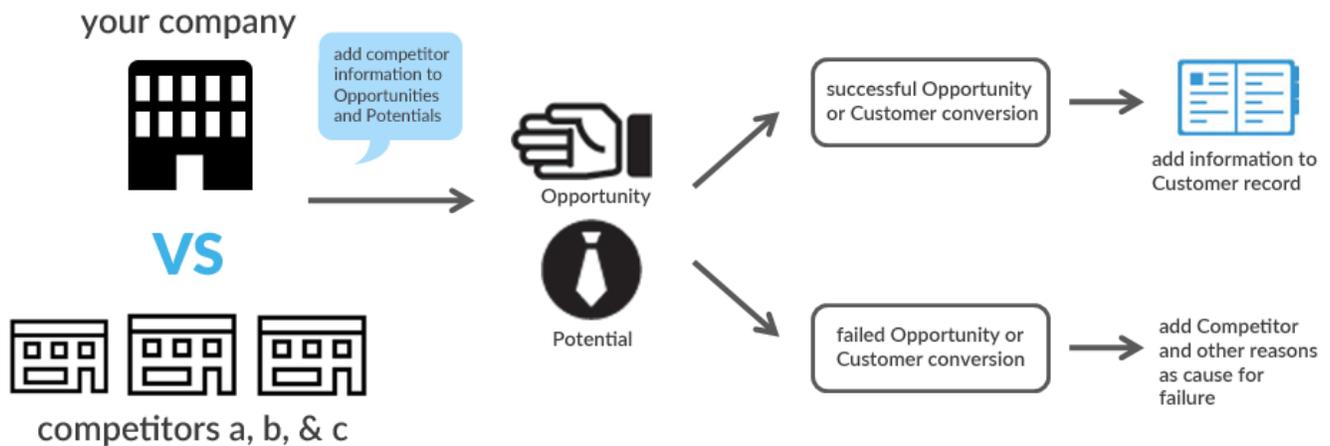
Introduction

There are competitors everywhere. And it is more than likely that your business will find itself as part of a bidding war for a contract or sale at some point in time with another organization that offers a similar product or service. Moffice CRM helps you keep track of your rivals so, through successful and failed bid wars, you can better glean what the true strengths and weaknesses of your product or service is and how it compares to others in the market.

So how does one utilize competitors?

1. Enter competitor data as well as information on their rival products/product groups
2. Add the relevant competitor to the Potential or Opportunity in question
3. Confirm successful/failed Customer conversions and Opportunity sales
4. View data in the Product menu and other Customer records
5. Analyze the strengths and weaknesses of your company as compared to others

Through continued usage of competitor data, you'll be able to see patterns in sales history and bidding wars.



How to: Add Competitors to Moffice CRM

To add a Competitor to Moffice CRM, start by going to the Customers > Accounts sub-menu. Competitors are considered Accounts because their data needs to be saved and they do not fit into the Customer life cycle as Leads, Potentials and Customers do.

In the Accounts menu, click the pencil icon to add a new Competitor.



Make sure to add the Company name and set the Account Type as Competitor before saving to the list.

The screenshot shows the 'Accounts' form in the Moffice CRM. The left sidebar is titled 'Customers' and includes a 'Pencil' icon for adding a new account. The main form area is titled 'Accounts' and contains the following fields and options:

- Customer Type:** Radio buttons for 'Company' (selected) and 'Individual'.
- Company Name:** A text input field with a red border and a red 'x' icon, with the error message 'Please enter the company name.' below it.
- Employee:** A text input field with a '+' icon.
- Industry:** A text input field with a '+' icon.
- Employees:** A text input field.
- Sales Revenue:** A text input field.
- Main Product:** A text input field.
- Email:** A text input field with an email icon, a 'Company' dropdown, and a '+' icon.
- Phone:** A text input field with a phone icon, a 'Phone Number' dropdown, an 'Extension' text input field, and a 'Company Phon' dropdown with a '+' icon.
- Address:** A dropdown for 'USA', a 'Zip Code' text input field, a '-- State --' dropdown, a '-- City --' dropdown, an 'Address' text input field, and a 'Company' dropdown.
- Website:** A dropdown menu with options: Reseller, Agency, Analyst, Investor, Affiliate, Media, Supplier, Vendor, Other.
- Memo:** A text input field.
- Accounts Type:** A dropdown menu with 'Competitor' selected. Below it is a checkbox labeled 'Add as Customer'.

How to: Add Products to a Competitor

After you add Competitors, you'll want to add the Products or Product Groups for which they are Competitors. In the Product menu, find the Competitors > All Competitors sub-menu to see a list of all the Competitors you have added as well as the overall competitions, successes, and failures.

The screenshot shows the 'All Competitors' overview page. At the top, there is a navigation bar with icons for Dashboard, Customers, Potentials, Leads, Opportunities, Activities, Products (highlighted in orange), Marketing, Help Desk, Feeds, Customization, and Page Layout. Below this is a sidebar with a 'Products' menu and a 'Competitors' sub-menu. The main content area displays a table of competitors with columns for Competitors, Products, Competitions, Success, and Failure.

Competitors	Products	Competitions	Success	Failure
blue glitter cosmetics	Doll Perfect Shadow Palette, Doll Perfec...	0	0	0
black lace beauty	Doll Perfect Invisible Concealer, Doll Pe...	1	1	0
violet regal beauty shop	Doll Perfect Marionette Lipstick	0	0	0
goddess skincare	Doll Perfect Baby Puff Powder, Doll Per...	0	0	0
lovely girls inc.		0	0	0
Total 5				

Click on any Competitor and then click the plus icon next to the “Products” heading to add a Product for that Competitor.

Select a Product from your registered Product tree and then add an issue comment (ie. competitor price, popularity, strengths, etc.). Add as many products as needed. After you add the Competitor to bid wars for Potentials and Opportunities, the information about successes and failures can be seen in this profile.

The screenshot shows the detailed profile for the competitor 'black lace beauty'. The page includes a 'Homepage' section with a 'Products +' button and a list of products: 'Doll Perfect Invisible Concealer' and 'Doll Perfect Polish Primer'. Below this is a table for 'Add Product Comparison History' with columns for Name, Writer, Date, and Issues. A single entry is shown for 'Doll Perfect Polish Primer' with a comment: 'more expensive for competitor product'. To the right, there is a 'Competitor History' table showing a record for 'Strongtex' on '2016/02/04' with 'Katherine Hong' as the assigned rep and a 'Success' result.

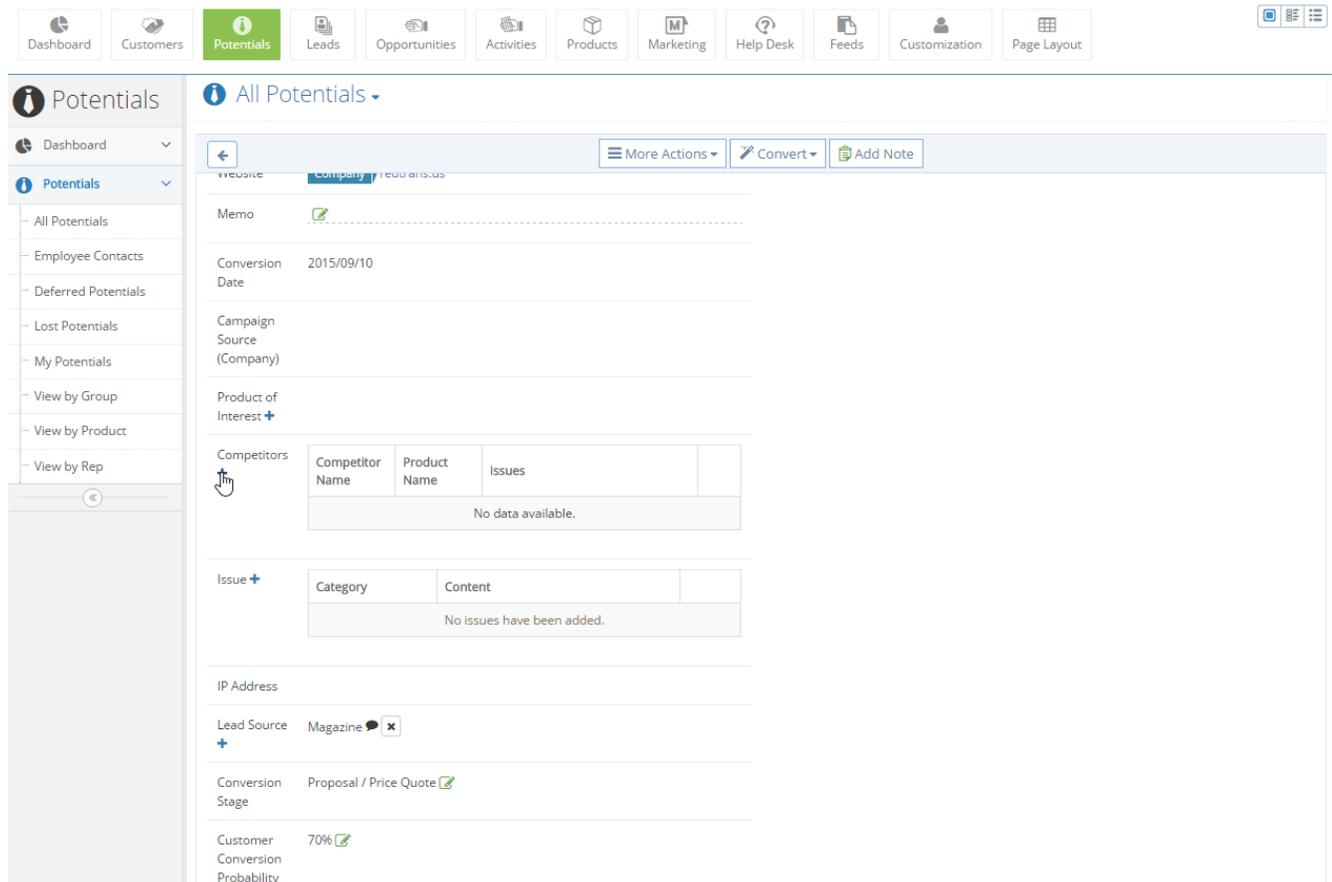
Name	Writer	Date	Issues
Doll Perfect Polish Primer	Katherine Hong	2016/02/04	more expensive for competitor product

Customer Name/Opportunity	Products	Date	Assigned Rep	Results
Strongtex	Doll Perfect Polish Primer	2016/02/04	Katherine Hong	Success

How to: Add Competitors to a Potential or Opportunity

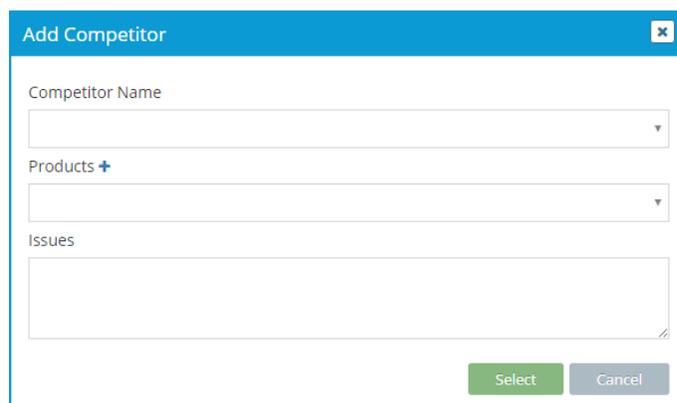
To add data about one or more Competitors to a Potential or Opportunity, you'll first need to head to the Potential or Opportunity menu respectively.

In the default “Details” tab, there should be a section titled “Competitors”. From here, you can click the “+” plus sign to add a Competitor.



The screenshot displays the Salesforce interface for a Potential record. The top navigation bar includes tabs for Dashboard, Customers, Potentials (active), Leads, Opportunities, Activities, Products, Marketing, Help Desk, Feeds, Customization, and Page Layout. The left sidebar shows the Potentials menu with options like All Potentials, Employee Contacts, Deferred Potentials, Lost Potentials, My Potentials, View by Group, View by Product, and View by Rep. The main content area shows the 'All Potentials' view for a specific record. The 'Competitors' section is highlighted, showing a table with columns for Competitor Name, Product Name, and Issues. The table currently contains no data, with a message 'No data available.' below it. A plus sign (+) is visible next to the 'Competitors' label, indicating the option to add a new competitor. Other fields visible include Memo, Conversion Date (2015/09/10), Campaign Source (Company), Product of Interest, IP Address, Lead Source (Magazine), Conversion Stage (Proposal / Price Quote), and Customer Conversion Probability (70%).

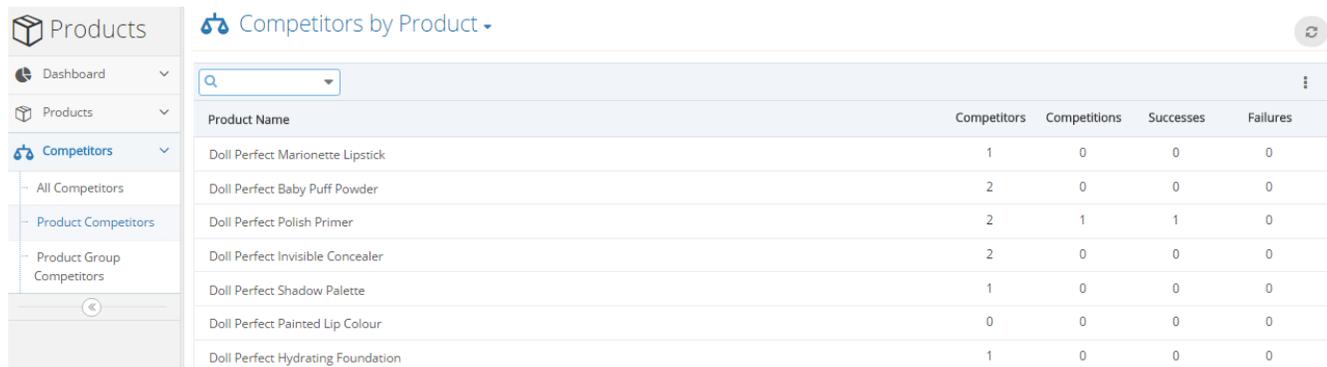
When you add a Competitor, you'll select a Product (previously added) from the drop-down selection or select a new Product (not previously added) from your Product tree and any issues.



The 'Add Competitor' dialog box is shown, featuring a blue header with the title 'Add Competitor' and a close button (X). The form contains three main sections: 'Competitor Name' with a dropdown menu, 'Products +' with a dropdown menu, and 'Issues' with a text area. At the bottom right, there are two buttons: 'Select' (green) and 'Cancel' (grey).

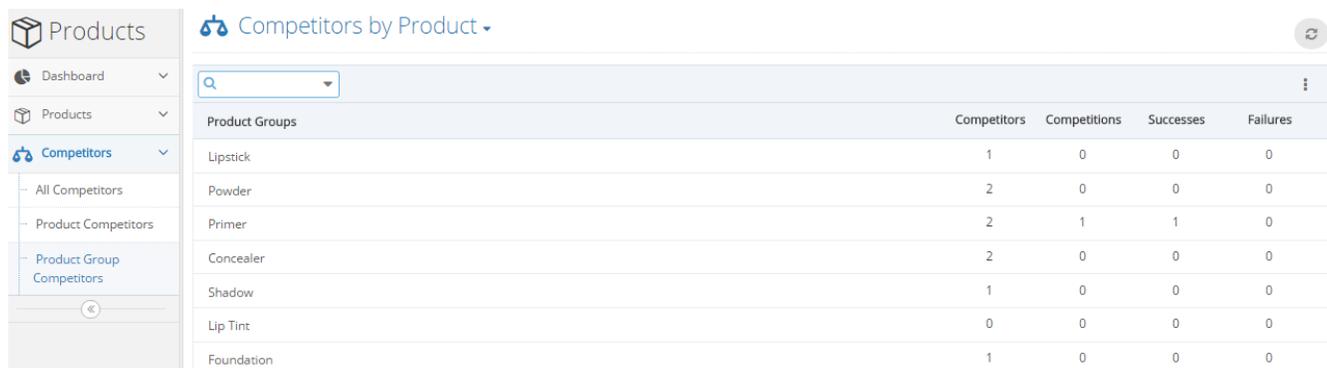
How to: View Competitions with Competitor Products and Product Groups

To view competitions for specific Products and Product Groups, go to the Products > Competitor sub-menus. Click the “Product Competitors” sub-menu to view the number of Competitors, Competitions, Successes, and Failures for each of your respective Products.



Product Name	Competitors	Competitions	Successes	Failures
Doll Perfect Marionette Lipstick	1	0	0	0
Doll Perfect Baby Puff Powder	2	0	0	0
Doll Perfect Polish Primer	2	1	1	0
Doll Perfect Invisible Concealer	2	0	0	0
Doll Perfect Shadow Palette	1	0	0	0
Doll Perfect Painted Lip Colour	0	0	0	0
Doll Perfect Hydrating Foundation	1	0	0	0

You can also view the same information by Product Group by going to the “Product Group Competitors” sub-menu.



Product Groups	Competitors	Competitions	Successes	Failures
Lipstick	1	0	0	0
Powder	2	0	0	0
Primer	2	1	1	0
Concealer	2	0	0	0
Shadow	1	0	0	0
Lip Tint	0	0	0	0
Foundation	1	0	0	0