

CRM

Welcome to the CRM documentation. This guide provides comprehensive insights into managing your customer relationships, optimizing workflows, and leveraging the features of the CRM system. Inspired by the powerful functionality of EspoCRM, our CRM is tailored to streamline resellers' operations, making it easier to track, manage, and grow your business relationships.

Our CRM is a customer relationship management platform designed to help resellers streamline their business processes. It provides tools for managing customer data, tracking sales, automating workflows, and generating reports to drive informed decision-making.

Whether you're tracking potential leads or managing ongoing client relationships, this CRM is built to improve efficiency and foster growth.

Key Benefits:

- Centralized customer data management
- Enhanced sales tracking and forecasting
- Seamless task and activity management
- Advanced reporting and insights
- Flexible customization options

- [Using CRM \(Intro\)](#)
- [Using Accounts](#)
- [Using Contacts](#)
- [Using Leads](#)
- [Using Opportunities](#)
- [Using Activities](#)

Using CRM (Intro)

1. Getting Started

System Requirements

To use the CRM effectively, ensure your system meets the following requirements:

- Web Browser: Chrome, Firefox, Safari, or Edge (latest versions recommended)
- Internet Connection: Stable, high-speed connection
- Screen Resolution: Minimum 1024x768 pixels for optimal display

User Access and Roles

Our CRM employs a role-based access control system. Common roles include:

- **Administrator:** Full access to all features and settings
- **Sales Manager:** Access to sales data, lead management, and reporting
- **Customer Support:** Access to accounts and activity tracking

To ensure data security, users should be assigned appropriate roles based on their responsibilities.

Logging In

- Navigate to the CRM Login topic.
- Enter your username and password.
- Click Login.
- If you forget your password, use the “Forgot Password” link to reset it.

2. Core Features

Dashboards

Dashboards provide an overview of your business’s key metrics and activities. They can be customized to display:

- Sales performance
- Upcoming tasks
- Recent activity logs
- Key performance indicators (KPIs)

Accounts and Contacts

The Accounts and Contacts modules are central to managing your relationships:

- **Accounts:** Represent businesses or organizations.
- **Contacts:** Represent individuals associated with accounts.

Actions:

- Add new accounts or contacts
- Link contacts to accounts
- View detailed interaction history

Leads and Opportunities

Track potential customers and convert them into sales with these tools:

- **Leads:** Capture initial interest and qualification details.
- **Opportunities:** Monitor sales prospects, including estimated revenue and closing dates.

Sales Management

Manage your entire sales pipeline in one place:

- Visualize your sales funnel.
- Track deal progress across stages (e.g., prospecting, negotiation, closed-won).
- Assign tasks to team members to ensure timely follow-ups.

Task and Activity Tracking

Stay organized with integrated task and activity management:

- Schedule calls, meetings, or follow-ups.
- Assign tasks to team members.
- Set reminders and track completion statuses.

3. Customization

Every business is unique, and the CRM offers extensive customization options:

- **Fields:** Add or modify data fields in modules to capture the information you need.
- **Layouts:** Adjust module layouts for a more user-friendly experience.
- **Dashboards:** Personalize dashboards with widgets relevant to your role.

4. Advanced Features

Reports and Analytics

Gain insights into your performance with powerful reporting tools:

- Generate pre-built or custom reports.
- Visualize data with charts and graphs.
- Export reports in multiple formats (e.g., PDF, Excel).

Automation and Workflows

Automate repetitive tasks to save time and reduce errors:

- Set up automated notifications and reminders.
- Create workflows for tasks like lead assignment or email follow-ups.
- Define triggers based on specific actions (e.g., status changes).

Integrations

Expand functionality with third-party integrations:

- **Email Integration:** Sync with Gmail, Outlook, or other email clients.
- **Calendar Sync:** Integrate with Google Calendar or Microsoft Outlook for scheduling.
- **API Access:** Connect the CRM with your existing tools and platforms.

5. Troubleshooting and Support

Common Issues

- **Unable to Login:**
 - Ensure you're using the correct username and password.
 - Reset your password if necessary.
 - Contact support if issues persist.
- **Slow Performance:**
 - Check your internet connection.
 - Clear browser cache and cookies.
 - Ensure your browser is up to date.
- **Missing Data:**
 - Verify access permissions.
 - Check filters or search settings in the module.

Support Options

The CRM offers several support channels:

- **Knowledge Base:** Access detailed articles and tutorials.
- **Email Support:** Contact our team at support@crm.com.

- **Live Chat:** Available during business hours via our website.

With the CRM, managing your customer relationships has never been easier. Whether you're tracking leads, closing deals, or maintaining client satisfaction, our platform is designed to help you succeed. For additional guidance, reach out to our support team for assistance.

Using Accounts

The Accounts module is designed to help you manage and organize businesses or organizations you interact with. Each account serves as a central hub where you can store essential information, track interactions, and link related contacts, leads, and opportunities. Here's a detailed guide to using the Accounts section effectively.

1. Navigating to the Accounts Module

- Log in to your CRM dashboard.
- Locate the main navigation menu on the left-hand side.
- Click on **Accounts** to access the module.
- You'll see a list view displaying all existing accounts.

2. Creating a New Account

To add a new account:

1. **Click the "Create" Button:**
 - In the Accounts module, click the + Create button at the top-right corner.
2. **Fill Out the Account Details:**
 - Account Name (Required): Enter the name of the business or organization.
 - Industry: Select the industry category (e.g., Retail, Technology).
 - Type: Indicate whether it's a customer, prospect, partner, or vendor.
 - Billing Address: Enter the billing address of the account.
 - Shipping Address: If different, specify the shipping address.
 - Phone Number: Add the main contact number for the account.
 - Website: Enter the account's website URL.
3. **Save the Account:**
 - Click the Save button at the bottom to store the new account.

Note: You can **Link Related Records** by using the "Contacts," "Opportunities," or "Tasks" sections to link relevant records that appear after saving.

3. Viewing and Editing Accounts

Accessing an Account Record:

- From the Accounts list view, click on the desired account's name to open its detailed record view.

Editing Account Information:

- In the account record view, click the **Edit** button at the top-right corner.
- Update the necessary fields (e.g., phone number, address, or industry).
- Click **Save** to apply the changes.

4. Linking Contacts to an Account

Contacts represent individuals associated with an account. To link contacts:

1. Open the desired account record.
2. Scroll down to the Contacts subpanel.
3. Click the Link button to associate an existing contact or the + Create button to add a new one.
 - If creating a new contact, enter the individual's details (e.g., name, email, phone).
4. Save the contact. It will now appear in the Contacts subpanel.

5. Managing Interactions and Activities

The Accounts module allows you to track interactions and activities, such as meetings, calls, and tasks:

Adding Activities:

- In the account record, locate the **Activities** subpanel.
- Click + **Create** to add a new activity, such as a call, meeting, or task.
- Enter relevant details like date, time, and description.
- Save the activity.

Viewing Interaction History:

- The **History** subpanel displays completed activities, emails, and notes linked to the account.

6. Filtering and Searching Accounts

Use filters and search options to locate specific accounts quickly:

Search Bar:

- Use the search bar at the top of the Accounts list to find an account by name, industry, or type.

Filters:

- Click the **Filters** button to apply advanced filters based on criteria like creation date, assigned user, or status.

7. Deleting Accounts

Deleting an Account:

- Deleting an account is permanent, so use this option only if the account is no longer needed.
- Open the account record.
- Click the **Remove** button.
- Confirm the deletion.

8. Best Practices for Managing Accounts

- **Keep Data Updated:** Regularly review and update account information to ensure accuracy.
- **Use Notes:** Add notes to account records to document key interactions or insights.
- **Leverage Automations:** Set up workflows to automate tasks like follow-up reminders or email notifications.
- **Collaborate:** Use the "Assigned To" field to delegate account ownership and tasks effectively within your team.

By mastering the Accounts module, you'll unlock the full potential of your CRM to build stronger relationships and drive your business forward. For additional help, contact our support team or refer to the full CRM documentation.

Using Contacts

1. Navigating to the Contacts Module

- Log in to your CRM dashboard.
- Locate the main navigation menu on the left-hand side.
- Click on **Contacts** to access the module.
- You'll see a list view displaying all existing contacts, including names, associated accounts, and email addresses.

2. Creating a New Contact

To add a new contact:

1. Click the "Create" Button:
 - In the Contacts module, click the + Create button at the top-right corner.
2. Fill Out the Contact Details:
 - First Name and Last Name (Required): Enter the individual's name.
 - Email Address: Add the primary email address for communication.
 - Phone Number: Include the main contact number.
 - Associated Account: Link the contact to an existing account for better organization.
 - Address: Enter the contact's physical or mailing address, if applicable.
3. Save the Contact:
 - Click the Save button to store the new contact.

3. Viewing and Editing Contacts

Accessing a Contact Record:

- From the Contacts list view, click on the desired contact's name to open their detailed record.

Editing Contact Information:

- In the contact record view, click the **Edit** button at the top-right corner.
- Update any necessary fields, such as email, phone number, or associated account.
- Click **Save** to apply the changes.

4. Linking Contacts to Accounts

Each contact should be associated with an account for better data organization and tracking. To link a contact to an account:

1. Open the desired contact record.
2. Locate the **Account** field in the record.
3. Select an existing account or create a new one directly from the dropdown.
4. Save the changes.

5. Tracking Interactions and Activities

The Contacts module allows you to log and monitor all interactions with individuals:

Adding Activities:

- In the contact record, locate the **Activities** subpanel.
- Click **+ Create** to add an activity such as a call, email, or meeting.
- Enter details like the date, time, and description of the interaction.
- Save the activity.

Viewing Interaction History:

- The **History** subpanel displays completed activities, notes, and emails linked to the contact.

Logging Notes:

- Use the **Stream** section to document key insights or conversations related to the contact.

6. Searching and Filtering Contacts

Quickly locate contacts using the search and filter options:

Search Bar:

- Use the search bar at the top of the Contacts list to find a contact by name, email, or phone number.

Filters:

- Click the **Filters** button to apply advanced criteria, such as account association, title, or location.

7. Deleting Contacts

Deleting a Contact:

- Deleting permanently removes the contact from the CRM. Use this option carefully.
- Open the contact record.
- Click the **Remove** button.
- Confirm the deletion.

8. Best Practices for Managing Contacts

- **Keep Contact Details Current:** Regularly review and update email addresses, phone numbers, and titles.
- **Document Interactions:** Use notes and activity tracking to maintain a history of communications.
- **Link Contacts to Accounts:** Always associate contacts with relevant accounts for better organization.
- **Segment Your Contacts:** Use filters and tags to categorize contacts based on industry, location, or status.
- **Leverage Automation:** Set reminders or workflows for follow-ups and scheduled calls.

By mastering the Contacts module, you can strengthen individual relationships, improve communication efficiency, and drive your business goals forward. For further assistance, contact our support team or explore the full CRM documentation.

Using Leads

The **Leads** module is designed to help you capture, track, and manage potential customers effectively. Leads are individuals or organizations that have shown interest in your product or service but are not yet fully qualified. This guide will walk you through how to use the Leads module to convert prospects into long-term customers.

1. Navigating to the Leads Module

- Log in to your CRM dashboard.
- Locate the main navigation menu on the left-hand side.
- Click on **Leads** to access the module.
- You'll see a list view displaying all existing leads, including their names, statuses, and associated accounts or contacts.

2. Creating a New Lead

To add a new lead:

1. **Click the "Create" Button:**
 - In the Leads module, click the + **Create** button at the top-right corner.
2. **Fill Out Lead Details:**
 - First Name and Last Name: Enter the lead's personal information.
 - Company/Organization: If applicable, enter the lead's associated company.
 - Email Address and Phone Number: Provide contact details for communication.
 - Lead Source: Indicate how the lead was acquired (e.g., website inquiry, referral, trade show).
 - Status: Select the current status (e.g., New, In Progress, Qualified, Disqualified).
 - Industry: Specify the industry if applicable.
3. **Add Additional Information:**
 - Include notes about the lead's needs, timeline, or any relevant context.
4. **Save the Lead:**
 - Click the **Save** button to store the new lead.

3. Viewing and Editing Leads

Accessing a Lead Record:

- From the Leads list view, click on the desired lead's name to open their detailed record.

Editing Lead Information:

- In the lead record view, click the **Edit** button at the top-right corner.
- Update any necessary fields, such as email, status, or notes.
- Click **Save** to apply the changes.

4. Qualifying a Lead

Qualifying a lead means assessing their potential to become a customer. To qualify a lead:

1. Open the lead record.
2. Review the lead's details and interaction history.
3. Update the **Status** field to reflect their progression (e.g., Converted).
4. If the lead is ready to convert, link them to an account and/or contact or create a new one.

5. Tracking Interactions and Activities

To maintain a comprehensive history of your engagement with a lead:

Adding Activities:

- In the lead record, locate the **Activities** subpanel.
- Click **+ Create** to schedule calls, meetings, or tasks.
- Enter relevant details like date, time, and description.
- Save the activity.

Logging Notes:

- Use the **Stream** section to document important conversations or observations about the lead.

6. Filtering and Searching Leads

Quickly locate specific leads using the search and filter options:

Search Bar:

- Use the search bar at the top of the Leads list to find a lead by name, company, or email.

Filters:

- Click the **Filters** button to apply criteria such as status, lead source, or assigned user.

7. Converting Leads

Once a lead is qualified, you can convert it into an account, contact, or opportunity:

1. Open the lead record.

2. Click the **Convert** button.
3. Choose the desired action:
 - **Create Account and Contact:** Automatically generate an account and contact record based on the lead's details.
 - **Create Opportunity:** Link the lead to a new sales opportunity.
4. Review and confirm the information, then complete the conversion process.

8. Deleting or Archiving Leads

Deleting a Lead:

- Deleting permanently removes the lead from the CRM. Use this option carefully.
- Open the lead record.
- Click the **Delete** button.
- Confirm the deletion.

9. Best Practices for Managing Leads

- **Follow Up Promptly:** Timely communication can significantly improve lead conversion rates.
- **Qualify Leads Effectively:** Use clear criteria to assess whether a lead is worth pursuing further.
- **Document Interactions:** Keep a detailed record of communications and activities to maintain continuity.
- **Segment Leads:** Use filters and tags to categorize leads based on their industry, status, or source.
- **Automate Workflows:** Set up reminders and automated tasks for follow-ups to ensure no leads fall through the cracks.

By mastering the Leads module, you can streamline your sales pipeline and ensure that no potential customer is overlooked. For further guidance, reach out to our support team or refer to the full CRM documentation.

Using Opportunities

The **Opportunities** module is designed to help you manage and track potential revenue-generating deals. Opportunities represent sales prospects that you're actively working on, allowing you to monitor progress, forecast revenue, and prioritize efforts effectively. This guide will walk you through the features and best practices for using the Opportunities module.

1. Navigating to the Opportunities Module

- Log in to your CRM dashboard.
- Locate the main navigation menu on the left-hand side.
- Click on **Opportunities** to access the module.
- You'll see a list view displaying all existing opportunities, including their names, stages, and expected close dates.

2. Creating a New Opportunity

To add a new opportunity:

1. **Click the "Create" Button:**
 - In the Opportunities module, click the + **Create** button at the top-right corner.
2. **Fill Out Opportunity Details:**
 - Opportunity Name (Required): Provide a descriptive name for the opportunity.
 - Account: Link the opportunity to an existing account.
 - Expected Close Date: Specify the anticipated date for closing the deal.
 - Stage: Select the current stage of the sales process (e.g., Prospecting, Negotiation, Closed-Won, Closed-Lost).
 - Probability: Enter the potential revenue value for this opportunity.
 - Assigned User: Designate a team member responsible for managing the opportunity.
 - Add Additional Information: Include notes about the opportunity's background, client requirements, or key stakeholders in the description field.
3. **Save the Opportunity:**
 - Click the **Save** button to store the new opportunity.

3. Viewing and Editing Opportunities

Accessing an Opportunity Record:

- From the Opportunities list view, click on the desired opportunity's name to open its detailed record.

Editing Opportunity Information:

- In the opportunity record view, click the **Edit** button at the top-right corner.
- Update any necessary fields, such as stage, expected close date, or amount.
- Click **Save** to apply the changes.

4. Tracking Progress Through Sales Stages

The Opportunities module uses stages to track where each deal stands in the sales pipeline. Common stages include:

- **Prospecting**: Initial contact or discovery phase.
- **Qualification**: Assessing the lead's needs and fit.
- **Proposal**: Presenting solutions or quotes.
- **Negotiation**: Finalizing terms and addressing objections.
- **Closed-Won**: Successfully closed deals.
- **Closed-Lost**: Opportunities that did not result in a sale.

To update the stage:

- Open the opportunity record.
- Select the new stage from the **Stage** dropdown.
- Save your changes.

5. Adding Activities and Notes

Keep a detailed record of all interactions and activities related to each opportunity:

Adding Activities:

- In the opportunity record, locate the **Activities** subpanel.
- Click **+ Create** to schedule tasks, calls, or meetings.
- Enter details like date, time, and description.
- Save the activity.

6. Searching and Filtering Opportunities

Quickly locate specific opportunities using the search and filter options:

Search Bar:

- Use the search bar at the top of the Opportunities list to find an opportunity by name, account, or stage.

Filters:

- Click the **Filters** button to apply criteria such as expected close date, assigned user, or amount.

7. Closing Opportunities

When an opportunity reaches its conclusion, mark it as either "Closed-Won" or "Closed-Lost":

1. Open the opportunity record.
2. Update the **Stage** field to "Closed-Won" or "Closed-Lost" as shown in point 4.
3. Add a note explaining the outcome (e.g., reasons for loss or feedback from the client).
4. Save the record.

8. Best Practices for Managing Opportunities

- **Prioritize High-Value Deals:** Focus on opportunities with the highest potential revenue or strategic importance.
- **Regularly Update Stages:** Keep pipeline stages current to ensure accurate forecasting.
- **Collaborate:** Use the "Assigned User" field to delegate opportunities effectively and maintain accountability.
- **Leverage Insights:** Use reporting tools to identify trends and refine your sales strategies.
- **Automate Follow-Ups:** Set reminders and automated tasks for follow-ups to ensure consistent communication with prospects.

By mastering the Opportunities module, you can streamline your sales process, improve forecasting accuracy, and close more deals. For further assistance, reach out to our support team or explore the full CRM documentation.

Using Activities

The **Activities** module allows you to schedule, track, and manage all interactions and tasks related to your business. From emails and meetings to calls and tasks, the Activities module ensures that you stay organized and never miss an important follow-up. The built-in calendar provides a centralized view of your upcoming commitments. This guide will walk you through each component of the Activities section.

1. Navigating to the Activities Module

- Log in to your CRM dashboard.
- Locate the main navigation menu on the left-hand side.
- Click on **Activities** to access the module.
- You will see a categorized list view of emails, meetings, calls, tasks, and other scheduled activities.

2. Managing Emails

Emails are a crucial part of client communication. The CRM allows you to send, receive, and track emails directly within the system.

Sending an Email:

- Navigate to the **Emails** section under Activities.
- Click the **+ Compose** button to create a new email.
- Fill out the required fields:
 - **Recipient:** Add the email address of the contact or lead.
 - **Subject:** Enter a subject line.
 - **Message Body:** Write your email content.
 - **Attach** any necessary files.
- Click **Send** to deliver the email.

Tracking Emails:

- Sent and received emails are automatically linked to the associated contact, lead, or opportunity for easy tracking.
- Use the search bar to find specific emails by subject or recipient.

3. Scheduling and Managing Meetings

Meetings help you maintain direct communication with clients or team members. The Meetings section allows you to create and track all scheduled appointments.

Creating a Meeting:

- In the Activities module, navigate to the **Meetings** section.
- Click the **+ Create** button.
- Fill out the meeting details:
 - **Title:** Add a descriptive title for the meeting.
 - **Date and Time:** Specify the start and end times.
 - **Participants:** Add attendees from your contacts or team members.
 - **Location:** Enter the meeting venue or provide a video conferencing link.
- Save the meeting.

Managing Meetings:

- View upcoming meetings in the **Calendar** section.
- Reschedule or update meeting details by opening the meeting record and clicking **Edit**.
- Mark meetings as completed once they are finished.

4. Logging and Tracking Calls

Calls are essential for follow-ups and quick resolutions. The Calls section allows you to log both completed and scheduled calls.

Logging a Completed Call:

- Navigate to the **Calls** section under Activities.
- Click the **+ Create** button.
- Enter the following details:
 - **Subject:** Add a title for the call.
 - **Date and Time:** Specify when the call occurred.
 - **Duration:** Record how long the call lasted.
 - **Notes:** Summarize the conversation.
- Save the call record.

Scheduling a Call:

- Follow the same steps as logging a call but set the call status to **Scheduled**.
- Assign a reminder to ensure timely follow-up.

5. Managing Tasks

Tasks help you stay on top of to-dos and deadlines. The Tasks section allows you to create, assign, and monitor progress.

Creating a Task:

- Navigate to the **Tasks** section in Activities.

- Click the **+ Create** button.
- Fill out the task details:
 - **Subject:** Describe the task.
 - **Due Date:** Specify the deadline.
 - **Priority:** Set the priority level (e.g., Low, Medium, High).
 - **Assigned User:** Assign the task to a team member.
- Save the task.

Tracking Task Progress:

- Mark tasks as **In Progress** or **Completed** as you work through them.
- Use filters to view tasks by due date, priority, or assigned user.

6. Using the Calendar

The **Calendar** provides a centralized view of all scheduled activities, including meetings, calls, and tasks.

Accessing the Calendar:

- Navigate to the **Calendar** section in the main menu.
- Use the **Day**, **Week**, or **Month** views to customize your display.

Adding Events to the Calendar:

- Any meeting, call, or task scheduled in the Activities module is automatically added to the calendar.
- You can also create events directly in the calendar by clicking on a specific date and time slot.

7. Best Practices for Managing Activities

- **Set Reminders:** Use reminders to ensure no activity is missed.
- **Prioritize Tasks:** Focus on high-priority items to stay efficient.
- **Document Everything:** Keep detailed records of calls, emails, and meetings for future reference.
- **Collaborate:** Assign tasks and share meeting schedules with team members to enhance coordination.
- **Use Filters:** Leverage filtering options to focus on specific types of activities or timeframes.

By mastering the Activities module, you can stay organized, improve communication, and ensure all tasks and interactions are completed on time. For additional assistance, contact our support team or refer to the full CRM documentation.