

NIA-CRM User Manual

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Developed For: Niagara Industrial Association

Developed By: STELLAR CO.

Table of Contents

- **Introduction**
- **System Requirements**
- **Login & User Roles**
- **Dashboard Overview**
- **Members Module**
- **Contacts Module**
- **Email Patterns**
- **Notes & Strategic Data**
- **Archived Section**
- **NAICS Codes**
- **User Management**
- **Theme: Dark Mode**
- **Export & Import Features**
- **Support**

Introduction

NIA-CRM is a custom-built Customer Relationship Management system for managing member organizations, contacts, communications, strategic planning, and analytics for the **Niagara Industrial Association**. This platform simplifies complex administrative tasks with features like filtering, Excel import/export, email pattern storage, and user access control.

System Requirements

- Web Browser: Chrome, Edge, Firefox (Latest Versions)
- Backend: ASP.NET Core (Hosted Locally/Remotely)
- Frontend: Responsive Web UI (Optimized for desktop)
- Database: SQL Server
- Excel Support Required (for Import/Export)

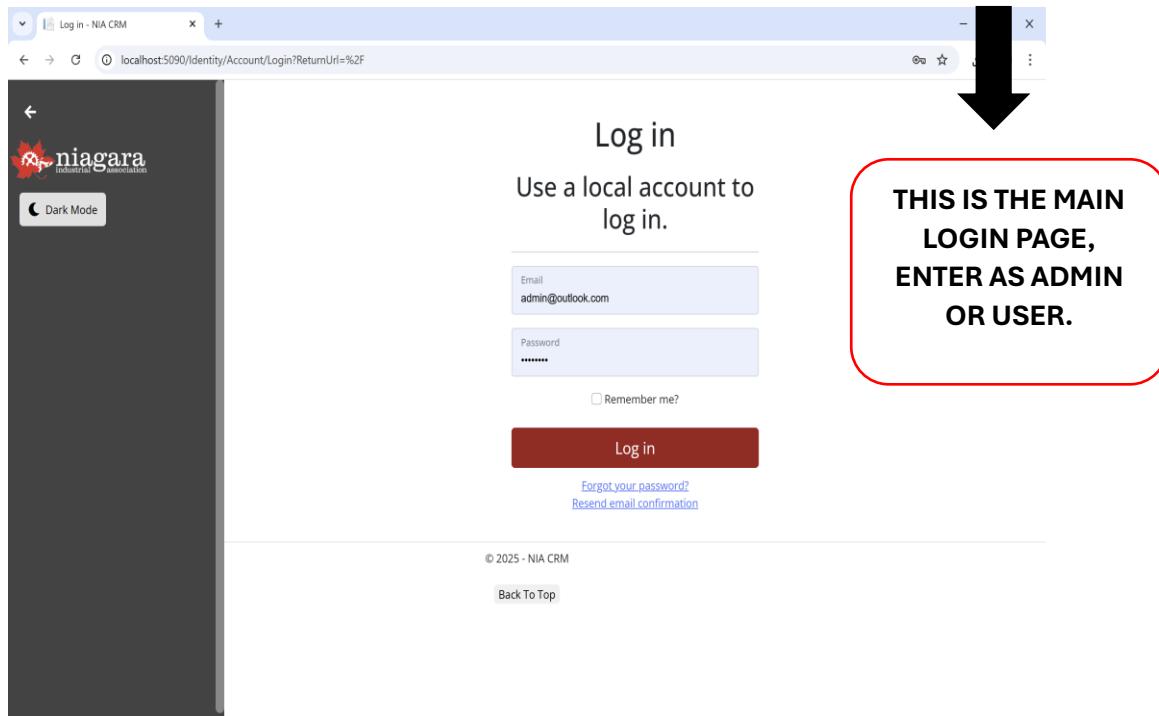
Login & User Roles

The system features a **secure login** system with the following roles:

- **Admin:** Full access including user management, NAICS code updates, and system configuration.
- **User:** Restricted access based on assigned permissions (e.g., view/edit members, access notes, etc.)

Login Steps: (see figure 1.1)

1. Navigate to the login page.
2. Enter your **Username** and **Password**.
3. Click **Login**.
4. Role-based access controls the visibility of features.



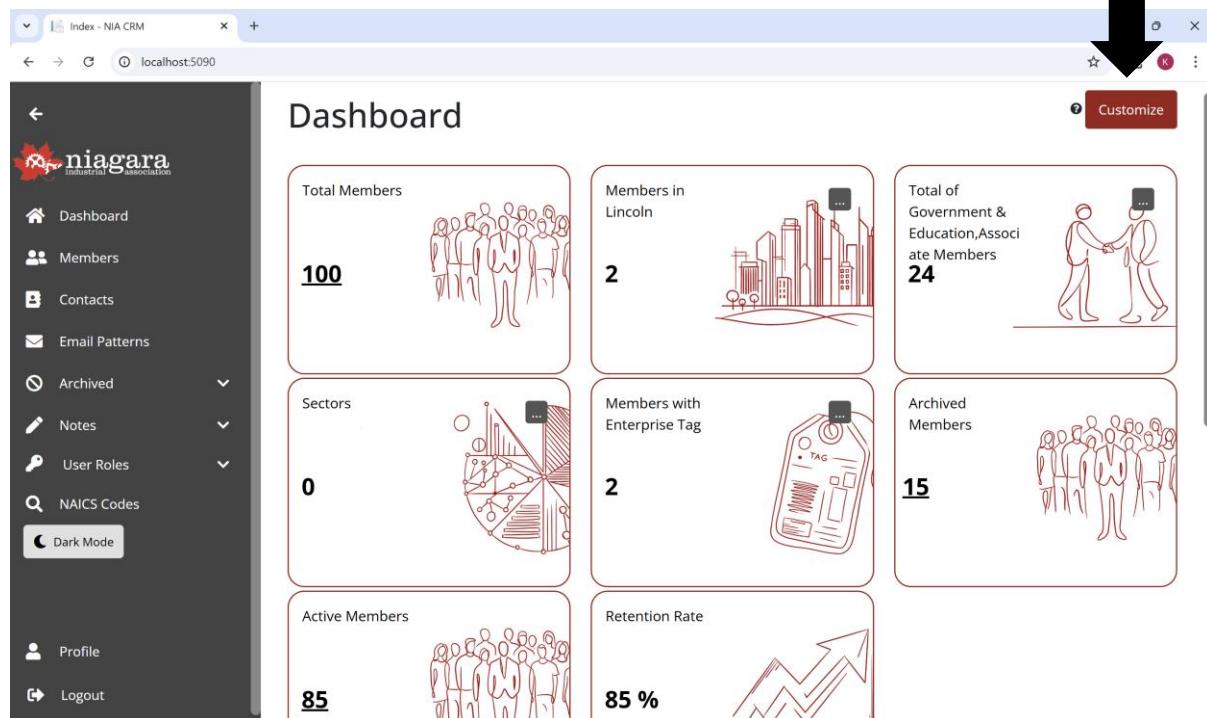
(Figure 1.1)

Dashboard Overview

The dashboard gives a quick visual summary of the CRM's key metrics:

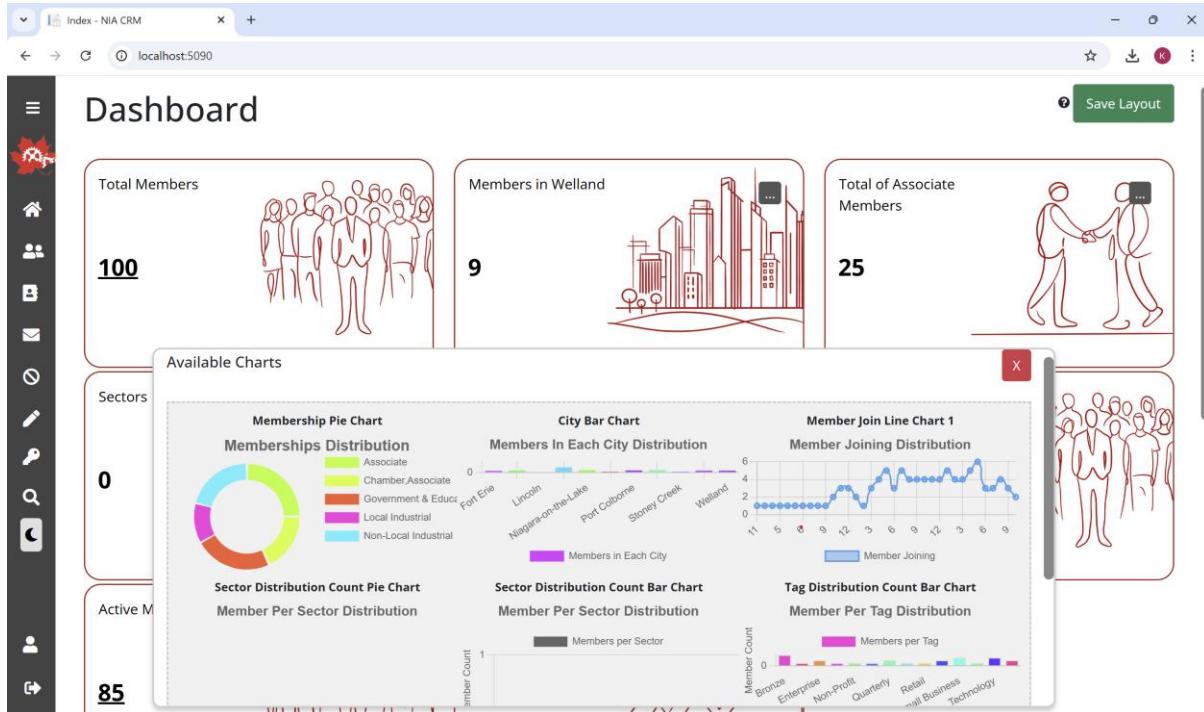
Tile	Description
Total Members	Shows the count of all registered members
Members in Fort Erie	Geographic-based member stats
Total Associate Members	Count of associate-tier memberships
Members with Bronze Tag	Filtered by membership tags
Archived Members	Shows archived/inactive members
Retention Rate	Displays member retention %
Sectors	Shows different sector data
Active Members	Total currently active members

❖ Click the "**Customize**" button to personalize your dashboard layout.(see figure 2.1)



(Figure 2.1)

Clicking on Customise gives you an experience of graphs that show memberships, member distribution in each city and data related to members joining. (See figure 3.1)



(Figure 3.1)

Members Module

Manage all NIA members in a searchable, filterable list.

Features:

- Add Member: Click red + Add Member button.
- Import Excel: Upload members using .xlsx files.
- Export to Excel: Export filtered or full list.
- Filter/Search: Apply filters by city, membership type, NAICS code, etc.
- Pagination: Navigate through multiple pages.

Each member record includes:

- Member Name
- City
- Membership Type
- NAICS Code

- Contact Name
- Email

FOR ADDING A MEMBER SEE **FIGURE 4.1**

This is the Member View; you can view the member data and by clicking on +Add Member redirects you to different page (add a member.)

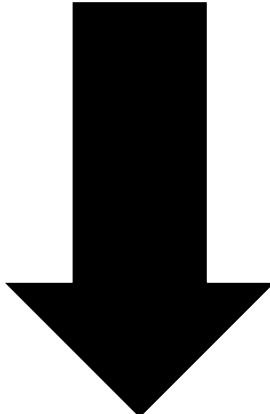
The screenshot shows the 'Members' page of the Niagara Industrial Association CRM. The left sidebar includes links for Dashboard, Members, Contacts, Email Patterns, Archived, Notes, User Roles, NAICS Codes, and Dark Mode. The main content area displays a table of member data with columns for Member Name, City, Membership Type, NAICS Code, Contact Name, and Email. The table lists several entries such as Aurora Renewable Energy, Brightline Education Systems, Brock University, Brockway Plumbing Services, and Cedar Ridge Rentals. At the top of the page are buttons for Import Excel, Choose File, Filter/Search, Export To Excel, and + Add Member. Below the table are navigation links for First, Previous, Pg. 1 of 17, Next, and Last.

Member Name ↑	City	Membership Type	NAICS Code	Contact Name	Email
Aurora Renewable Energy	Thorold	Associate	8111	Benny N. [3]	benjamin.nelson@example.com [3]
Brightline Education Systems	Lincoln	Associate	4411	Sarah A. [3]	sarah.johnson@example.com [3]
Brock University	St. Catharines	Non-Local Industrial	3111	Lucas B. [3]	lucas.brown@example.com [3]
Brockway Plumbing Services	Niagara Falls	Chamber,Associate	2211	Sophia K. [3]	sophia.king@example.com [3]
Cedar Ridge Rentals	St. Catharines	Government & Education,Associate	7111	D Williams [3]	deborah.williams@example.com [3]

(Figure 4.1)

Now this is the page for Adding A Member, you can add member according to your need – can add a picture it gives you functionality of selecting image, you can fill the details such

As Member Name, Join Date, Size, Website Url, Member Note, Assign Membership, Assign Tags – See Figure 5.1 below for details.



Add Member

Picture File: Drag & Drop your image here

Member Name (required)

Join Date (required)

Size (required)

WebsiteUrl

Paid

Assign Membership

Membership Accredited Available Memberships

Associate
Chamber,Associate
Government & Education,As
Local Industrial
Non-Local Industrial

Assign Tag

Tag Accredited Available Tags

Annual
Bronze
Construction
Education
Enterprise
Finance
Freelancer

Assign Sector

Sector Accredited Available Sectors

Aerospace
Agriculture
Automotive
Construction
Cybersecurity
E-commerce
Education
Energy
Entertainment
Finance
Government

Assign NAICS Code

NAICS Code Accredited Available NAICS Codes

1111
2111
2211
2361
3111
4231
4411
4811
5111
5221

(Figure 5.1)

Assign Sector

Sector Accredited Available Sectors

Aerospace
Agriculture
Automotive
Construction
Cybersecurity
E-commerce
Education
Energy
Entertainment
Finance
Government

Assign NAICS Code

NAICS Code Accredited Available NAICS Codes

1111
2111
2211
2361
3111
4231
4411
4811
5111
5221

Back to List **Next**

Contacts Module

Manage individual contact persons related to member organizations.

- Add, Edit, or Remove contacts.
- Search and Filter by name, member organization, or email.
- Contacts are linked to their respective members.

Navigate to the Contacts Page- Similar to Members You can also add A New Contact just click on Red Button at Top Right Corner, it redirects you to Add Contact Page- See Figure 6.1 below to learn more about it.

Add A New Contact and fill out details accordingly. See next steps and figures to learn.

The screenshot shows the Niagara Industrial Association CRM interface. On the left is a dark sidebar with navigation links: Dashboard, Members, Contacts (which is selected), Email Patterns, Archived, Notes, User Roles, NAICS Codes, Dark Mode, Profile, and Logout. The main content area is titled 'Contacts'. At the top, there are buttons for Import Excel, Choose File, Filter/Search, Send Email, Enable Contact Selection, Export To Excel, and '+ Add Contact'. Below these are buttons for First, Previous, Pg. 1 of 20, Next, and Last. The main table lists 100 records with columns for Contact Name, Email, Phone, LinkedInUrl, VIP, and Member Name. Each row contains a 'View LinkedIn' link and a small yellow 'VIP' badge. The Member Name column includes links to external websites like Sunset Motors, M Time Irons, Aurora Renewable Energy, Niagara Adventure Tours, and Crestwood Pharmaceutical. A red rounded rectangle highlights the '+ Add Contact' button. A large black arrow points downwards from the explanatory text above towards the screenshot.

Contact Name ↑	Email	Phone	LinkedInUrl	VIP	Member Name
All Johnson	alice.johnson@example.com	(555) 123-4567	View LinkedIn	VIP	Sunset Motors [3]
Alice Johnson	alice.johnson@example.com	(555) 123-4567	View LinkedIn	VIP	M Time Irons [2]
Almon Johnson	alice.johnson@example.com	(555) 123-4567	View LinkedIn	VIP	Aurora Renewable Energy [4]
Astarion Ancunin	iplayedbgb3toomuch@example.com	(707) 707-7777	View LinkedIn		Niagara Adventure Tours
Ava W.	ava.williams@example.com	(555) 667-7889	View LinkedIn	VIP	Crestwood Pharmaceutical [2]

(Figure 6.1)

This is the Creating New Contact Page. Fill the details and click on bottom red button “Create”.

(Figure 7.1)

Email Patterns

Create and manage reusable email templates for outreach.

Capabilities:

- Store standardized content.
- Use variables for personalization.
- Edit or delete templates as needed.

For Sending Emails You can choose any templates and can see its details, edit or delete it.

You can Also Add email that takes you to new page – see figure 8.1 for reference.

The screenshot shows the 'Email Patterns' index page of the NIA CRM. On the left is a dark sidebar with the 'niagara industrial association' logo and links for Dashboard, Members, Contacts, Email Patterns (which is selected), Archived, Notes, User Roles, NAICS Codes, Dark Mode, Profile, and Logout. The main content area has a title 'Email Patterns' and a 'Filter/Search 0' button. It displays a table of records found (5) with columns: Template Name, Email Type, Subject, Body Content, and Actions (Details, Edit, Delete). The table rows show:

Template Name	Email Type	Subject	Body Content	Actions
Cancellation Clarify	Cancellation	Membership Cancellation Confirmation	Dear Robert Johnson, We ...	[Details] [Edit] [Delete]
Maintaince Update	Other	NIA System Update	Dear Michael Brown, This...	[Details] [Edit] [Delete]
Membership Update	Product Updates	Important Membership Update	Dear Emily Davis, We wou...	[Details] [Edit] [Delete]
Primary Welcome	Welcome	Welcome to NIA!	Welcome to the NIA commun...	[Details] [Edit] [Delete]
Subscription Reminder	Reminder	Membership Renewal Reminder	Dear Jane Smith, Your me...	[Details] [Edit] [Delete]

At the bottom are 'Page 1 of 1', a copyright notice '© 2025 - NIA CRM', and a 'Back To Top' link.

The screenshot shows the 'Create Email Pattern' page of the NIA CRM. The left sidebar is identical to the index page. The main area has a title 'Create Email Pattern'. It contains fields for 'Template Name (required)' (with an empty input field), 'Email Type (required)' (set to 'Production'), 'Subject (required)' (empty input field), and 'Body Content (required)' (with a rich text editor toolbar and an empty text area). At the bottom are 'Back to Email Patterns' and 'Create' buttons.

(Figure 8.1)

Notes & Strategic Data

This section tracks key organizational planning and historical insights.

Subsections:

- Opportunities

- Strategies
- Annual Actions
- Member Events

All notes can be filtered and exported to Excel using the checkbox selection feature. This allows users to choose specific columns for export.

This is the Opportunities View, can also similarly add opportunities .

Opportunity Name ↓	Action	POC	Interaction	Status	Priority
Yoga Studio Collaboration	Discuss revenue share	Lisa White	Video Call	Negotiating	Medium
University Partnership	Develop joint fitness program	Charlotte Turner	Meeting	Qualification	High
Summer Bootcamp Program	Confirm venue	James Walker	Meeting	Negotiating	Medium
Sports Nutrition Collaboration	Discuss product bundling	Daniel Lewis	Conference	Qualification	High
Senior Fitness Program	Arrange trial session	Emma Hall	Phone Call	ClosedNotInterested	Low

This is the Strategies View, can also similarly add Strategy.

Strategy Name ↓	Strategy Assignee	Strategy Note	Created Date	Startegy Term	Strategy Status
Workforce Upskilling	Daniel White	Train employees on AI tools	10-09-2025 00:00:00	Cyclical	Done
Warehouse Automation	Mason Hill	Use AI-driven logistics	22-09-2026 00:00:00	Cyclical	Cancelled
Sustainability Initiative	David Martinez	Reduce carbon footprint	05-05-2025 00:00:00	Seasonal	To Do
Supplier Diversification	Noah Stewart	Reduce dependency on single supplier	05-05-2026 00:00:00	Medium-Term	Done
Subscription Model	Charlotte Adams	Introduce tiered pricing	15-02-2026 00:00:00	Medium-Term	In Progress

This is the Annual Actions View, can also similarly add a new action.

Annual Actions Name	Note	Date	Assignee	Status
Year-End Review	Assess team performance	2025-10-25	Sophia Nelson	Cancelled
Team Meeting	Kickoff meeting for new year	2025-01-15	Jane Smith	In Progress
System Maintenance	Upgrade CRM software	2025-02-01	Emily Davis	Cancelled
Sustainability Report	Prepare environmental report	2026-11-05	Lucas Evans	Done
Social Media Campaign	Boost brand awareness	2026-08-30	Harper Green	In Progress

This is the Events View, can also similarly add a new event.

Event Name	Event Description	Event Location	Event Date	Participants
Yoga Retreat	A weekend of yoga and mindfulness	Mountain Resort	2024-07-10	TISCO CO.
Strength Training Workshop	Hands-on weightlifting techniques	Fitness Gym	2024-08-05	Northern Metalworks
Marathon Training Camp	Coaching and preparation for marathon runners	City Stadium	2024-05-18	Forge & Foundry Inc.
Health & Wellness Seminar	Expert talks on nutrition and fitness	Downtown Hall	2024-06-22	M Time Irons
Fitness Expo	Annual fitness and wellness event	Convention Center	2024-09-15	Alpha Steel [2]

Archived Section

View and manage previously archived member data.

- View archived members

- Restore or permanently delete entries
- Useful for maintaining historical accuracy

Archived Contacts

Records Found: 14

Contact	Date	Archiving Note
Alice Johnson	2024-01-10	No longer working with us
Bob Joe	2021-11-30	Moved to a different industry
Charlie Davis	2023-09-18	Project completed
Deborah Williams	2020-12-05	No response to emails
Eve Marie	2023-02-14	Switched to competitor

Pg. 1 of 3

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Back To Top

Archived Members

Records Found: 15

Member ↑	Date	Archiving Note
Alpha Steel	2025-01-05	Member requested cancellation due to personal reasons.
Everest Iron Corp.	2025-02-10	Membership Price Increased.
Forge & Foundry Inc.	2025-01-12	Member requested cancellation due to personal reasons.
Galaxy Metals	2025-01-25	Account Suspension Due to Missed Payments.
Ironclad Industries	2025-01-27	Inconsistent Billing Cycle.

Pg. 1 of 3

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Back To Top

User Management

Features:

- **Manage User Roles:** Define new roles or modify existing ones.
- **Register User:** Add new users with specified roles and credentials.
- **Assign Permissions:** Control what modules a user can access.

The screenshot shows a web application interface for managing user roles. On the left is a dark sidebar with the Niagara Industrial Association logo and links for Dashboard, Members, Contacts, Email Patterns, Archived, Notes, User Roles (which is expanded to show Sub-Nodes like NAICS Codes), NAICS Codes, and Dark Mode. On the right, the main content area has a title "User Role Assignments". Below it is a table with three columns: "User Name", "Roles", and "Actions". Two rows are listed: one for "admin@outlook.com" assigned "Admin" and another for "super@outlook.com" assigned "Supervisor". Each row has an "Edit" button in the "Actions" column. At the bottom of the page, there's a footer with "© 2025 - NIA CRM" and a "Back To Top" link.

User Name	Roles	Actions
admin@outlook.com	Admin	<button>Edit</button>
super@outlook.com	Supervisor	<button>Edit</button>

This is the User Role Assignment.
You can Manage Roles, Register User

The screenshot shows a registration form titled "Register" with the sub-instruction "Create a new account.". It features three input fields: "Email", "Password", and "Confirm Password", followed by a large red "Register" button. The page includes the same dark sidebar as the previous screenshot. The footer at the bottom of the page also includes "© 2025 - NIA CRM" and a "Back To Top" link.

You can Manage Roles, Register User.

NAICS Codes

Manage and assign **North American Industry Classification System (NAICS)** codes.

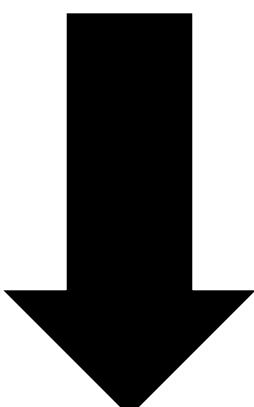
- Admins can **add**, **edit**, or **delete** codes.
- Used in member classification and reports.

This is the NAICS Codes Page.
Admins can **create** **edit** or
delete codes.

Code	Description	Actions
1111	Oilseed and Grain Farming	Edit Delete
2111	Oil and Gas Extraction	Edit Delete
2211	Electric Power Generation, Transmission, and Distribution	Edit Delete
2361	Residential Building Construction	Edit Delete
3111	Animal Food Manufacturing	Edit Delete
4231	Motor Vehicle and Motor Vehicle Parts and Supplies Wholesalers	Edit Delete
4411	Automobile Dealers	Edit Delete
4811	Scheduled Air Transportation	Edit Delete
5111	Newspaper, Periodical, Book, and Directory Publishers	Edit Delete

Theme: Dark Mode

Toggle between light and dark themes using the "**Dark Mode**" switch on the sidebar. Great for night-time or low-light usage.



This is the Toggle dark mode.

The screenshot shows the Niagara Industrial Association's CRM application. On the left is a sidebar with links like Dashboard, Members, Contacts, Email Patterns, Archived, Notes, User Roles, Profile, and Logout. A 'Toggle Dark Mode' button is visible. The main area is titled 'NAICS Codes' and shows a table of records. The table has columns for 'Code' and 'Description', and 'Actions' (Edit, Delete) for each row. The rows list various NAICS codes and descriptions, such as 1111 Oilseed and Grain Farming, 2111 Oil and Gas Extraction, etc. The entire interface is in dark mode, with light-colored text and buttons against a dark background.

Export & Import Features

Feature Functionality

Import Excel Upload bulk data (Members, Contacts, etc.) using pre-formatted Excel files

Export Excel Download data from any module with applied filters and selected fields

Filter/Search Advanced filters help export only what's needed (checkboxes to customize view)

For Member Export, Go to Member view click on this Export To Excel Button It opens a popup, see next step .

The screenshot shows the Niagara Industrial Association CRM interface. On the left is a dark sidebar with navigation links: Dashboard, Members (selected), Contacts, Email Patterns, Archived, Notes, User Roles, NAICS Codes, Dark Mode, Profile, and Logout. The main content area is titled "Members" and displays a table of member records. The table columns are: Member Name ↑, City, Membership Type, NAICS Code, Contact Name, and Email. The data includes entries for Aurora Renewable Energy, Brightline Education Systems, Brock University, Brockway Plumbing Services, and Cedar Ridge Rentals. At the top of the table are buttons for Import Excel, Choose file, and Export To Excel. Below the table are navigation buttons for First, Previous, Pg. 1 of 17, Next, and Last.

When This Popup Opens you can select any of the field you want to export and click on grey button export to export the selected fields in an excel file.

The screenshot shows the same Niagara Industrial Association CRM interface as above, but with a modal dialog box overlaid. The dialog is titled "Select Fields to Export". It contains several sections with checkboxes for selecting fields: "Include current filters in export", "Member Information" (checkboxes: Member Name, Website Url, Membership Type, Sectors, Member Size, Join Date, Member Note, NAICS Codes), "Contact Information" (checkboxes: Contact Full Name, Contact Department, Contact Phone, Contact Note, Contact Title, Contact Email, Contact LinkedIn, Is VIP), and "Address Information" (checkboxes: Address Line 1, Address City, Postal Code, Address Line 2, Address Province, Formatted Address). At the bottom of the dialog are "Cancel" and "Export" buttons. In the background, the member list table is partially visible.

For Importing Data

The screenshot shows the Niagara Industrial Association CRM interface. On the left is a dark sidebar with navigation links: Dashboard, Members (selected), Contacts, Email Patterns, Archived, Notes, User Roles, NAICS Codes, Dark Mode, Profile, and Logout. The main content area has a title 'Members' and a sub-section 'Import Instructions'. It includes a large red arrow pointing to the 'Import Excel' button. Below it are sections for 'Import Instructions', 'Download Sample Excel File for Import', and buttons for 'Filter/Search 0', 'Export To Excel', '+ Add Member', and a status bar showing 'Records Found: 85'.

For importing just select the excel file and read this instructions dialog box to learn more about it. Choose a file and import to excel, it gives a green colour popup saying members imported successfully.

You can export and import for each view like Contacts, in notes – Opportunities, Strategies, Annual Actions, Member Notes in a similar way. Just open that view and follow same steps.



If you encounter issues or need help:

Email: Stellar.Co@nia-crm.local