# NIA-CRM User Manual

**Last Updated:** April 17, 2025
**Developed For:** Niagara Industrial Association
**Developed By:** STELLAR CO.

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## 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)

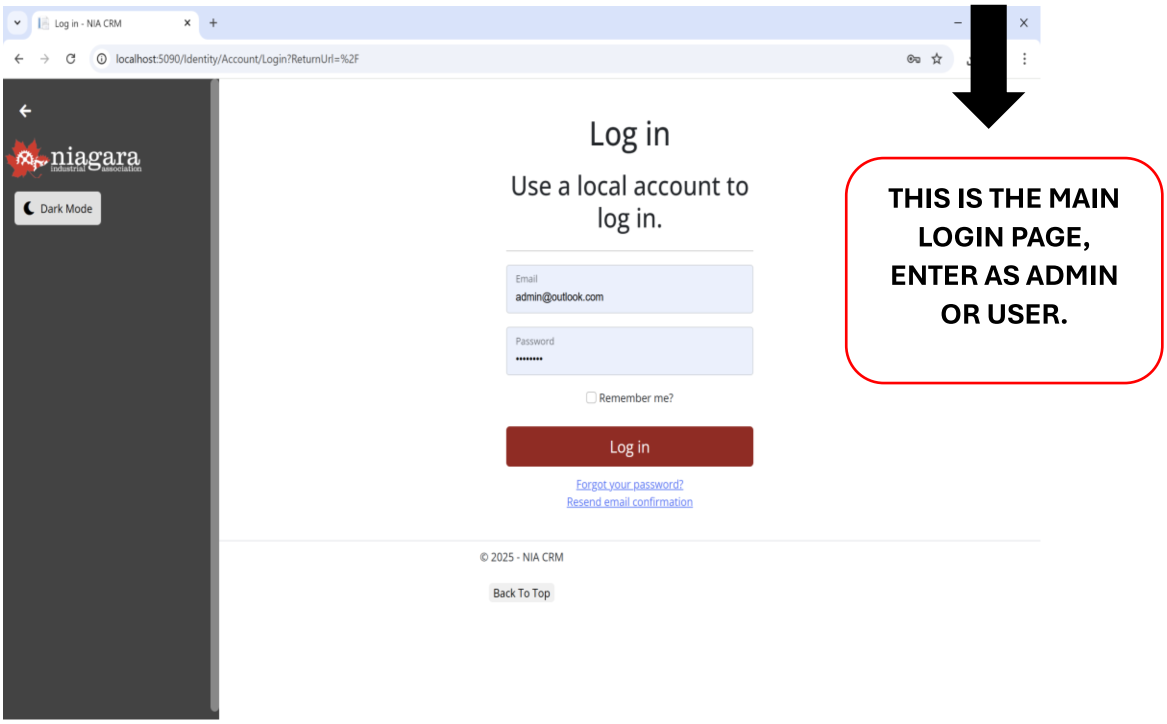
**Login & User Roles**

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.



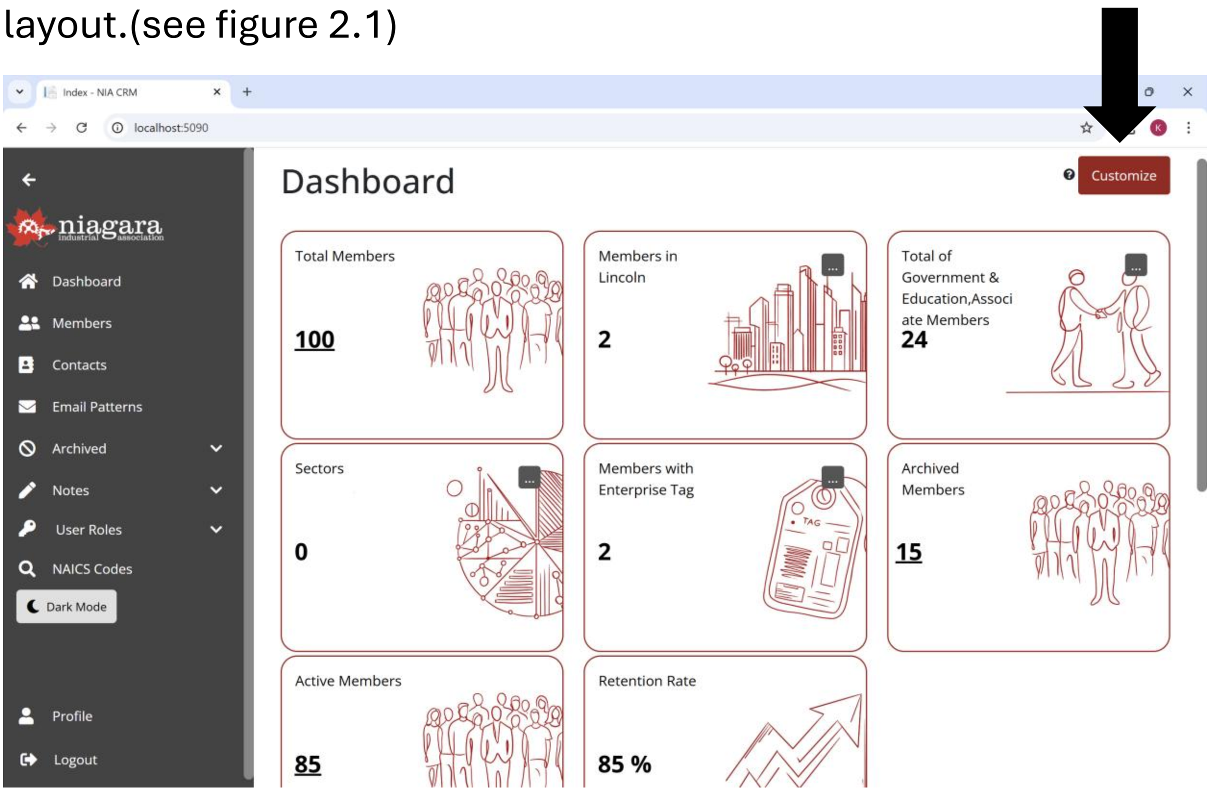

**(Figure 1.1)**

# Dashboard Overview

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

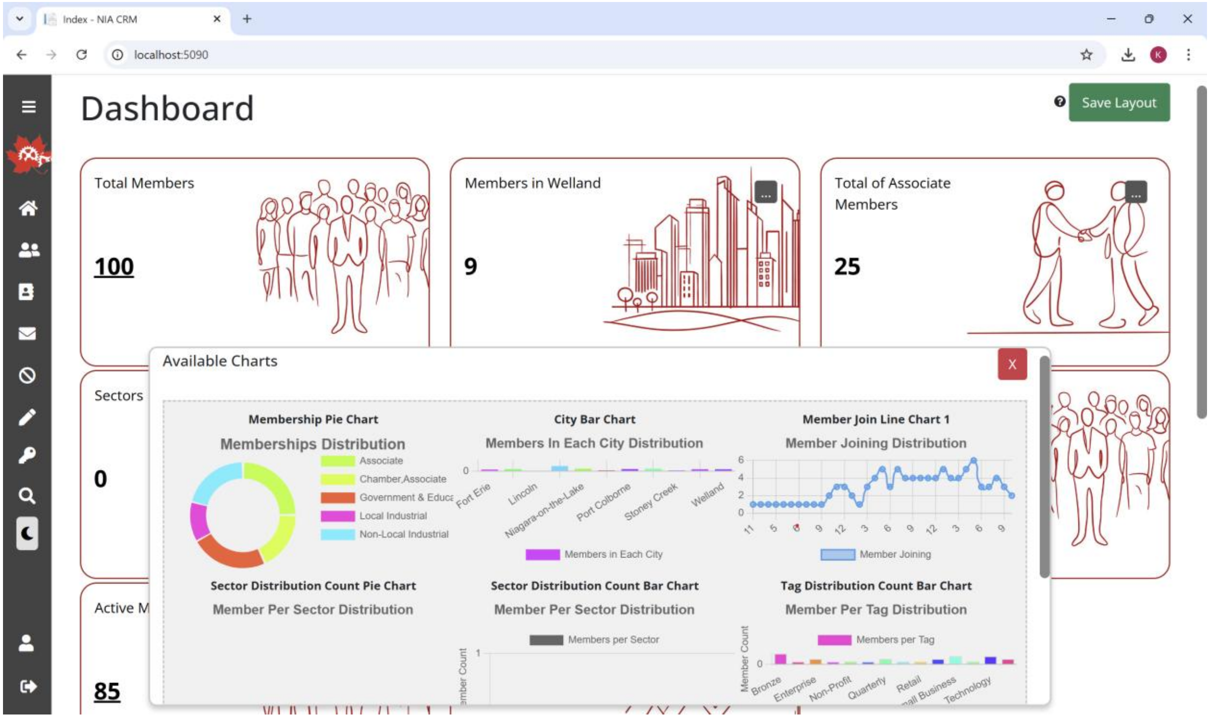
| Tile | Description |
|---|---|
| Total Members | Shows the count of all registered members |
| Members in Fort Erie | Geographic-based member stats |
| Total Associate Members | Count of associate-tier memberships |
| Members with Bronze Tag | Filtered by membership tags |
| Archived Members | Shows 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)**

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**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.

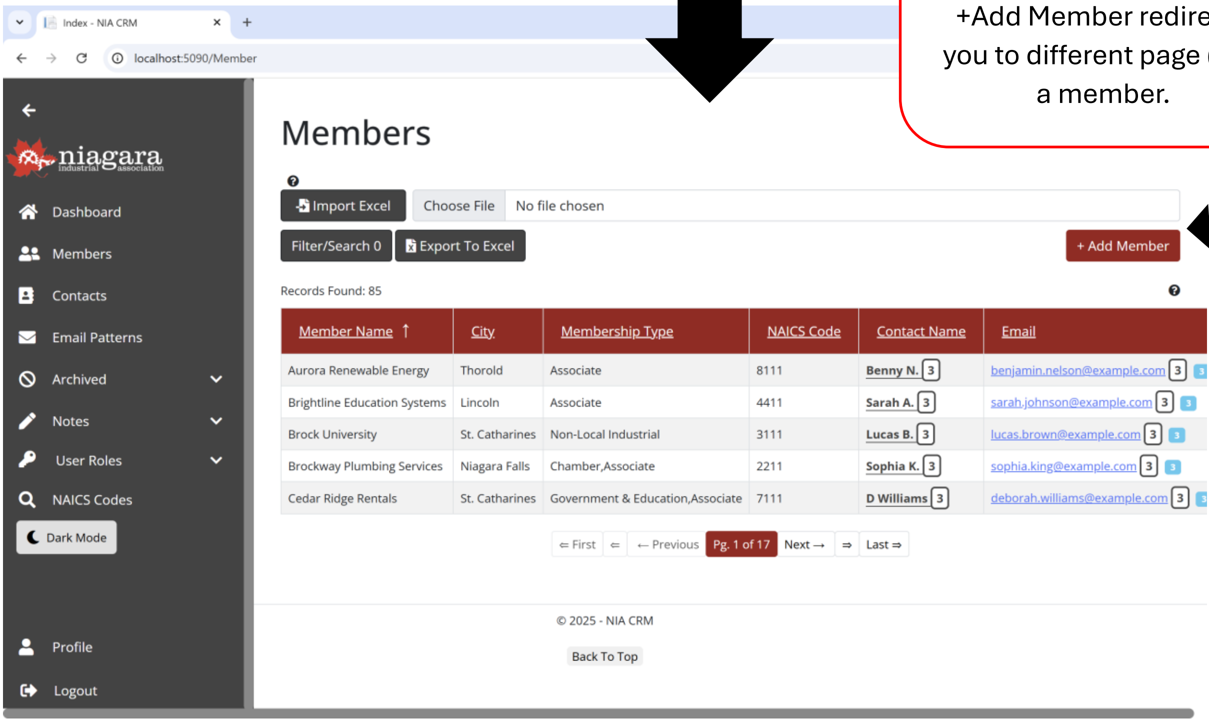
Each member record includes:

- 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.

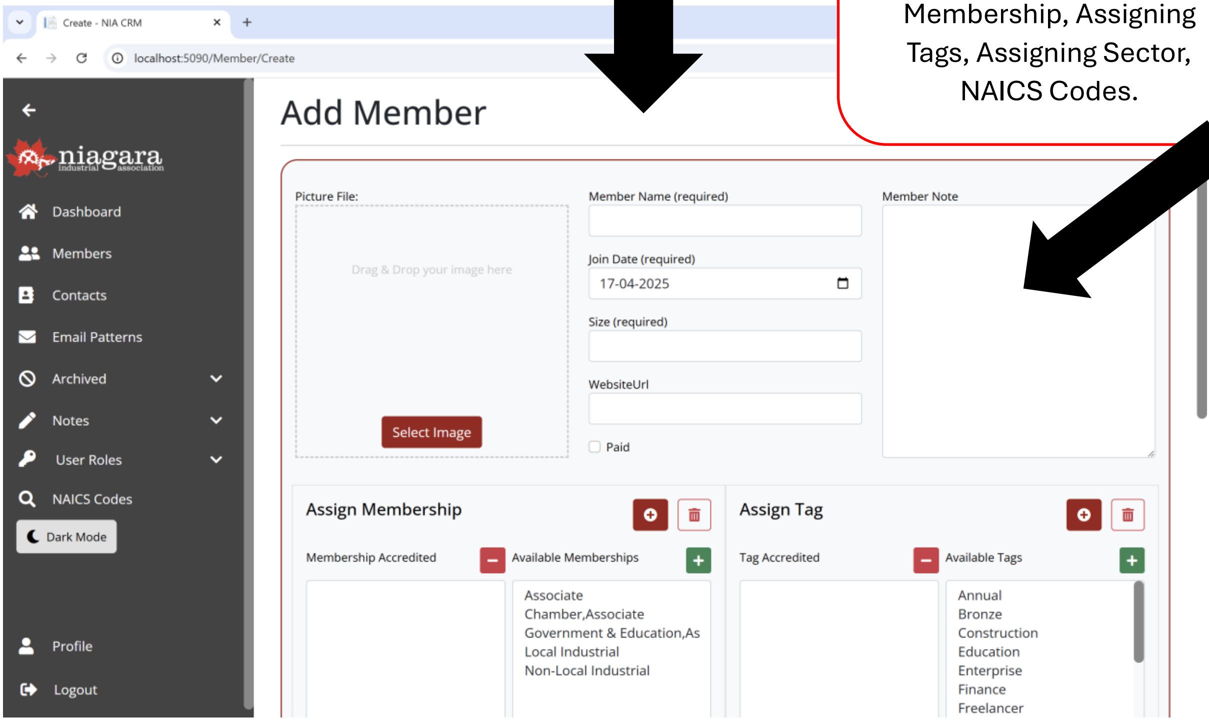



(Figure 4.1)

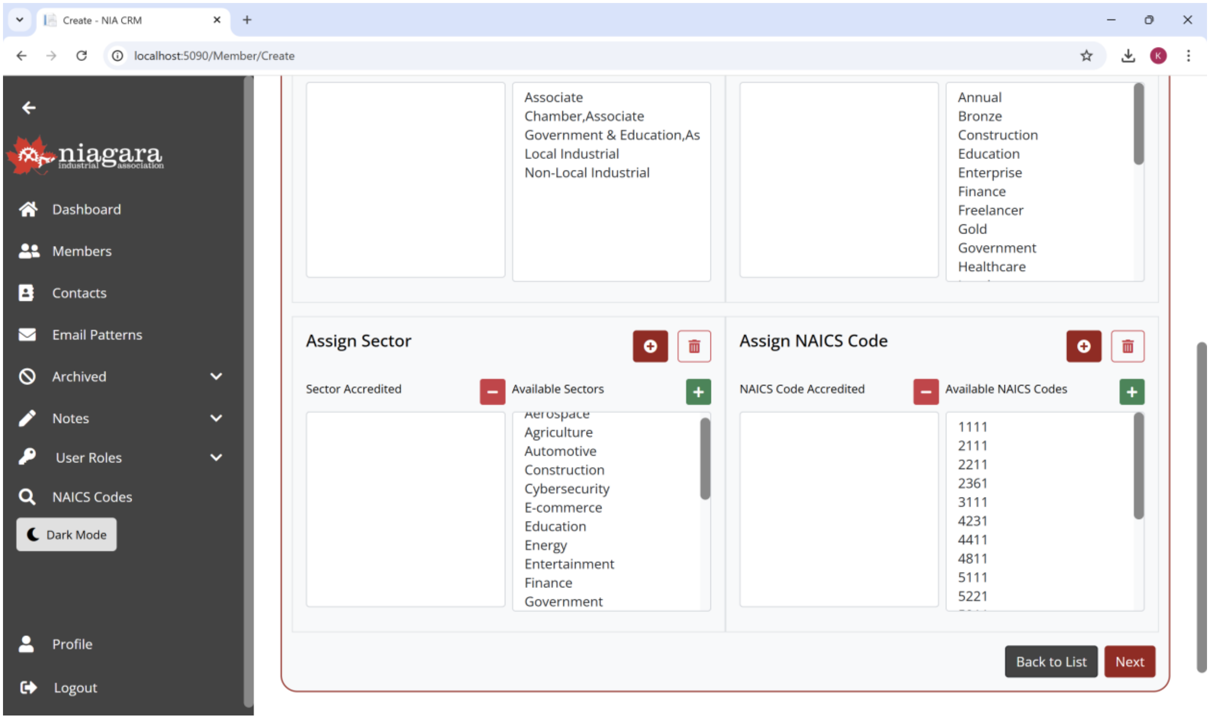
**Now this is the page for Adding A Member, you can add member according to your need – can add a picture it gives you functionality of selecting image, you can fill the details such**

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

Adding a Member, Adding Picture, and other details such as Assigning Membership, Assigning Tags, Assigning Sector, NAICS Codes.




**(Figure 5.1)**

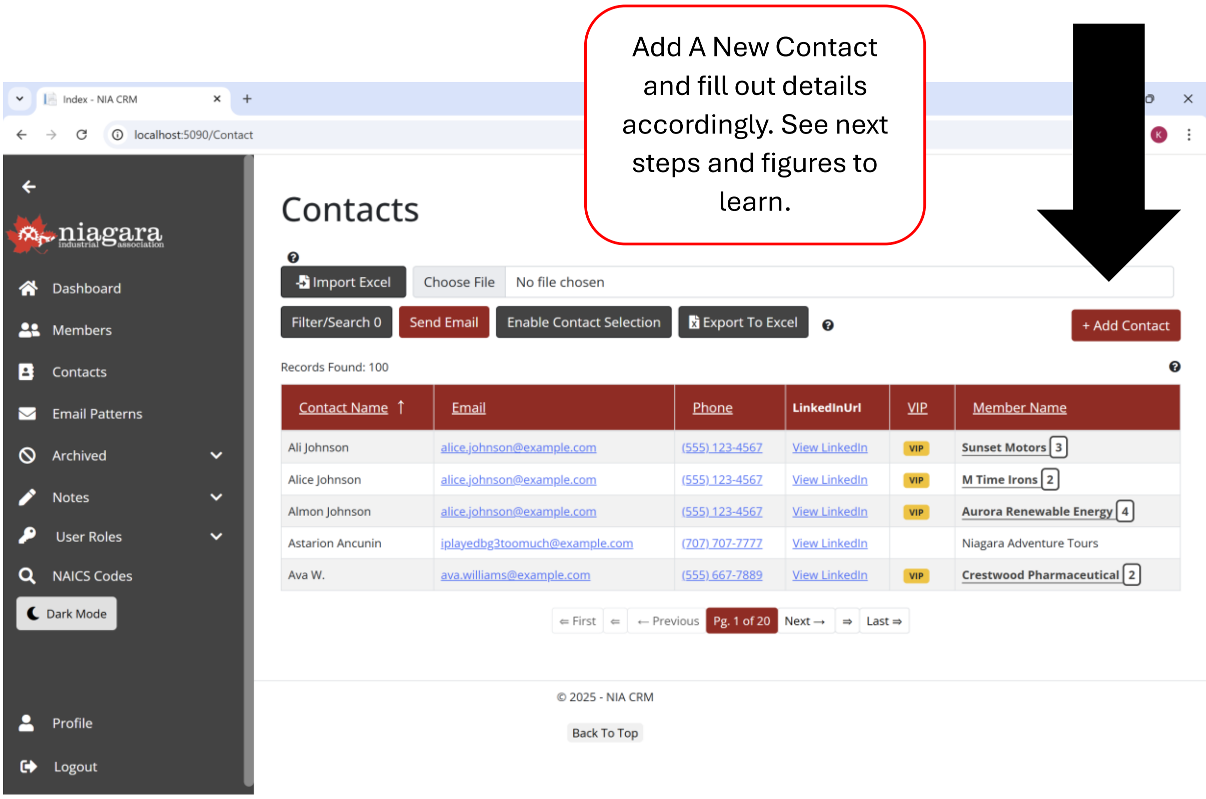


# Contacts Module

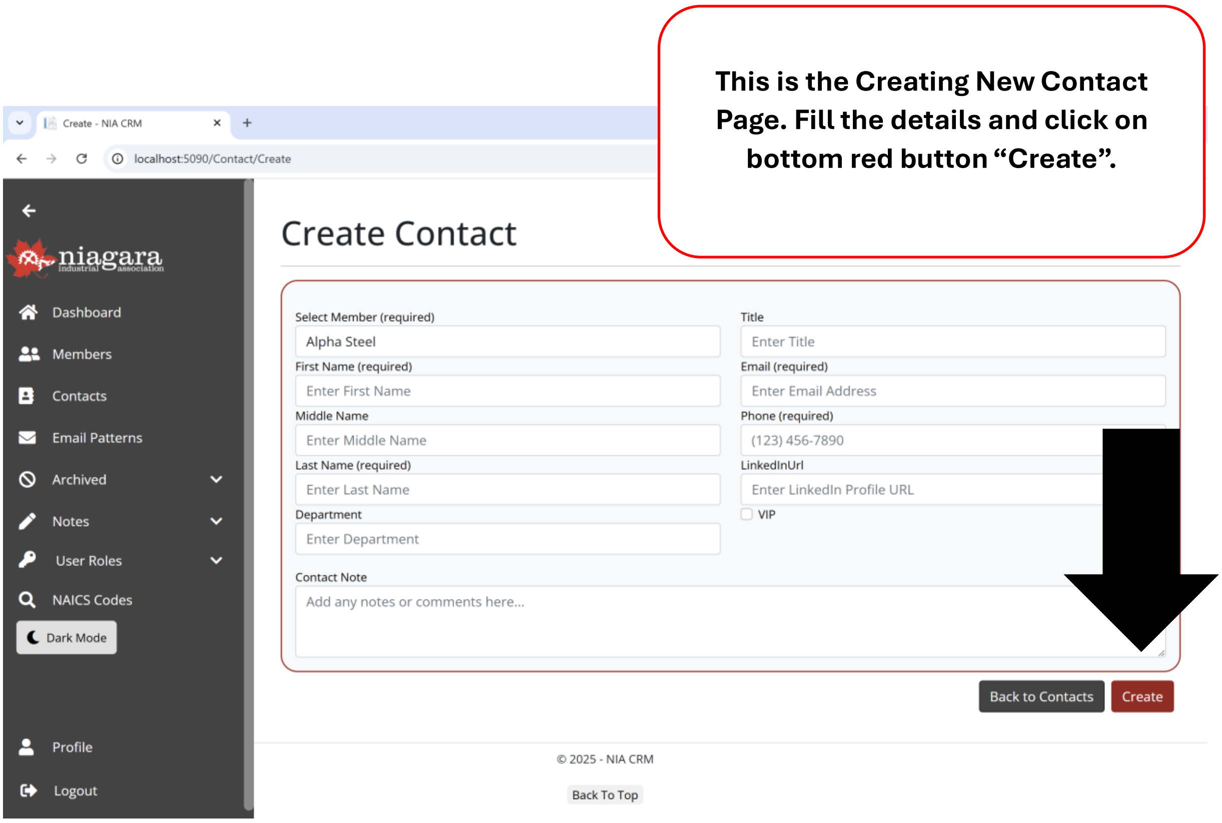
Manage individual contact persons related to member organizations.

- 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.




(Figure 6.1)




**(Figure 7.1)**

## Email Patterns

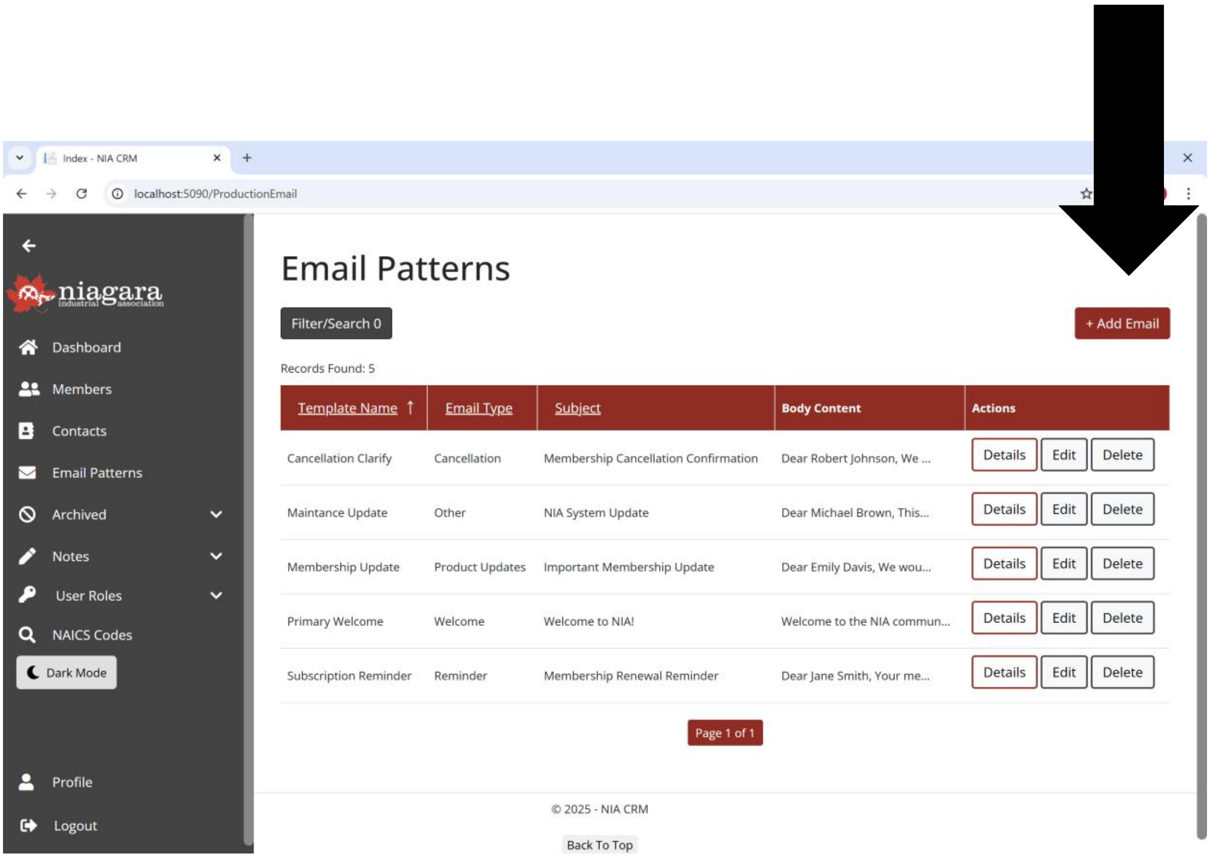
Create and manage reusable email templates for outreach.

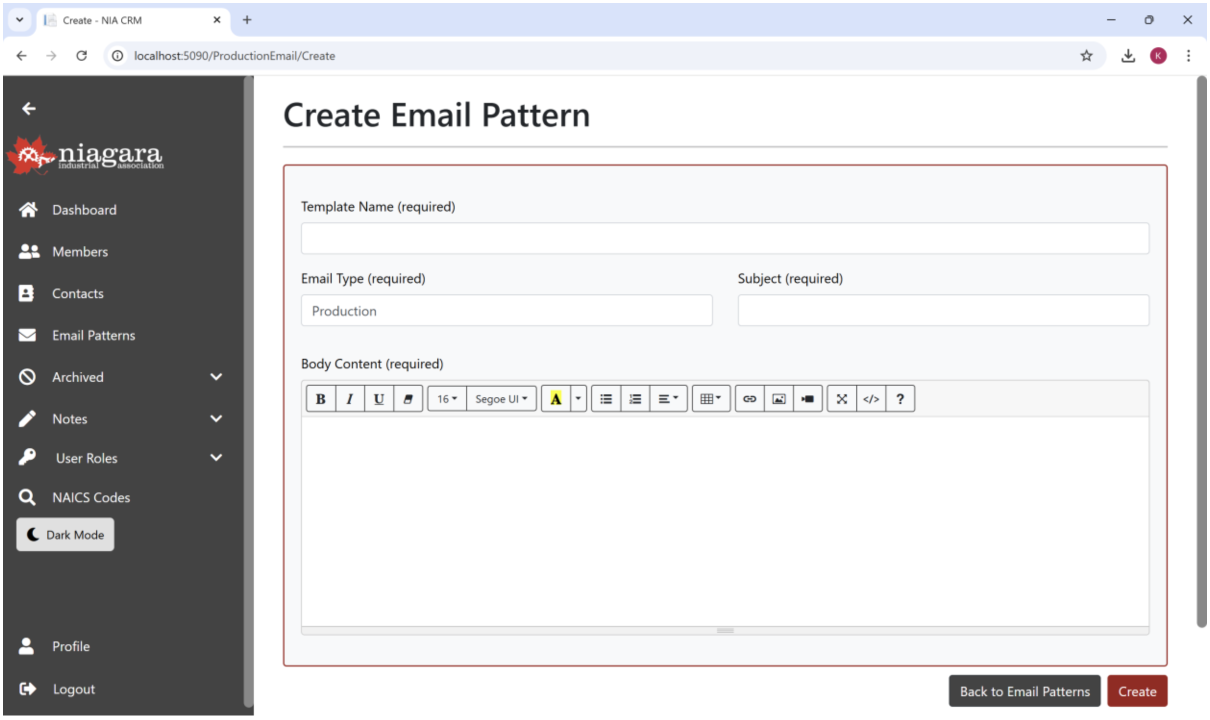
Capabilities:

- 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.**




**(Figure 8.1)**

## Notes & Strategic Data

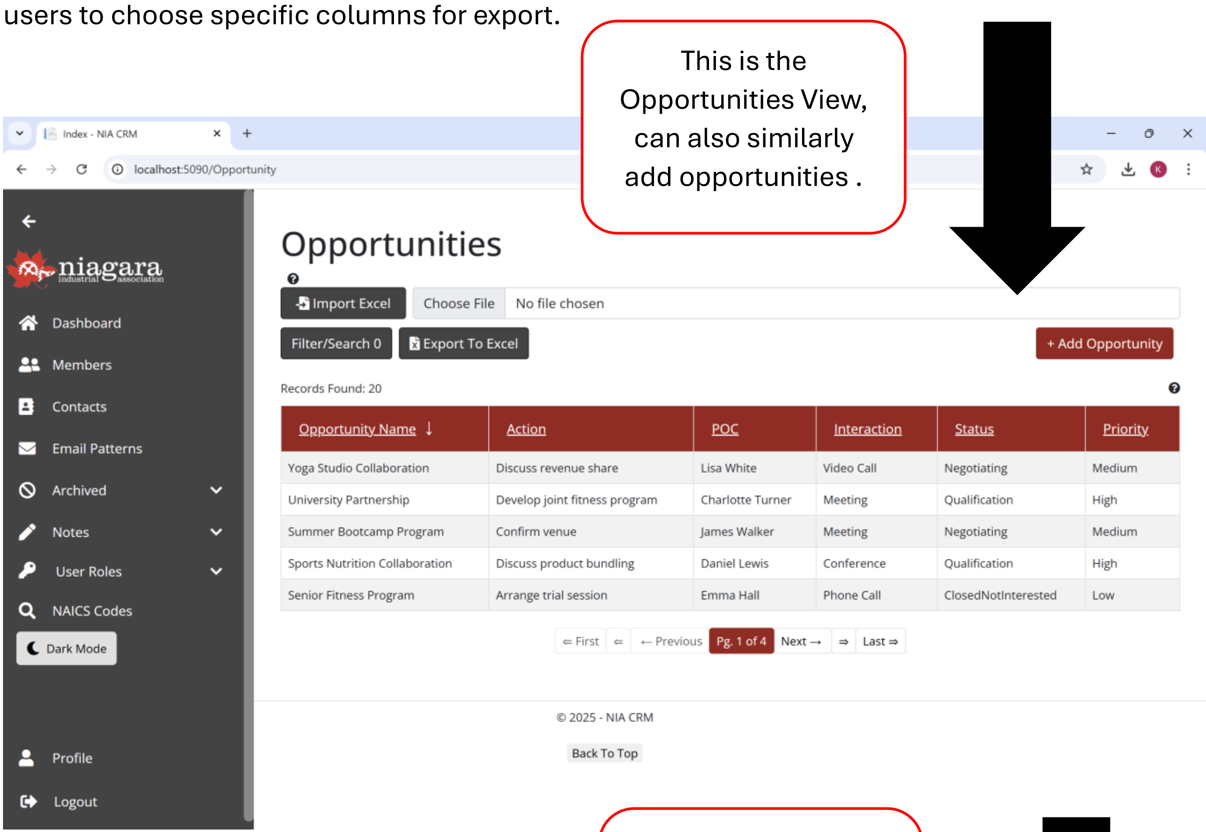
This section tracks key organizational planning and historical insights.

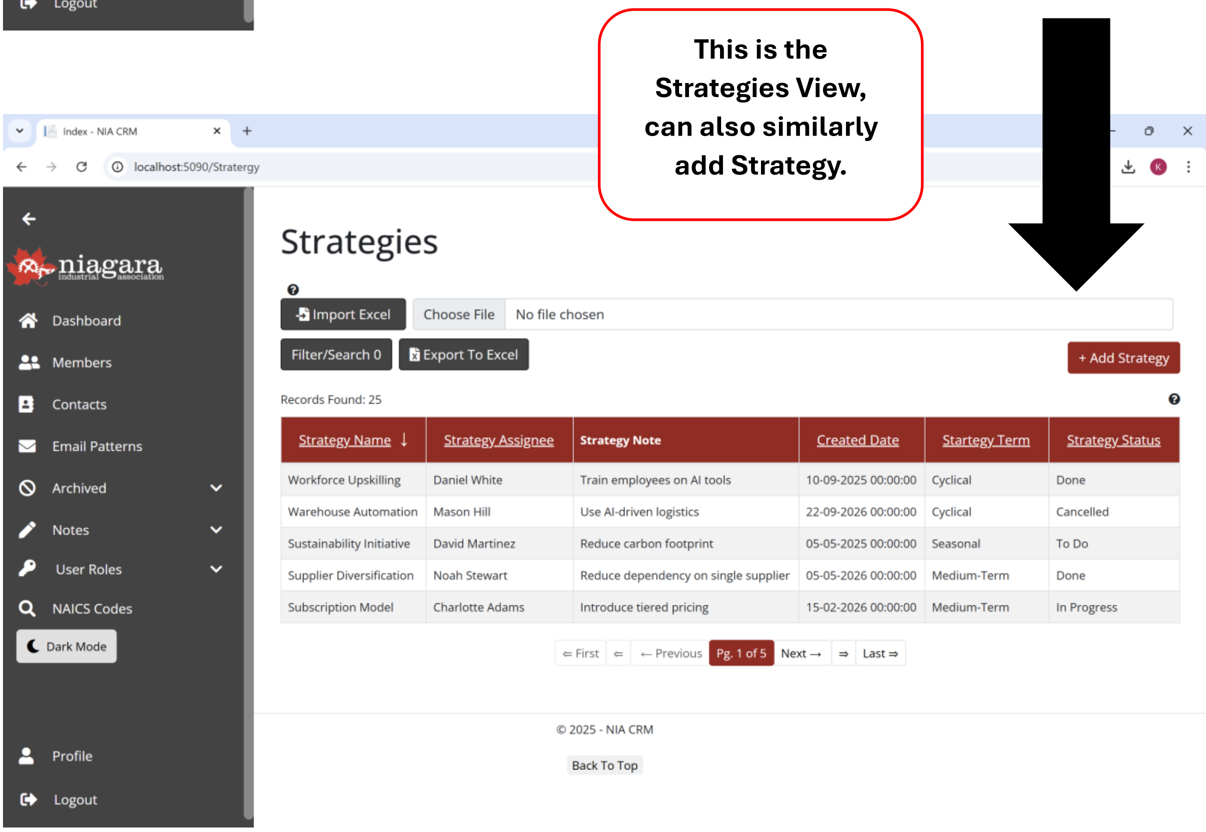
Subsections:

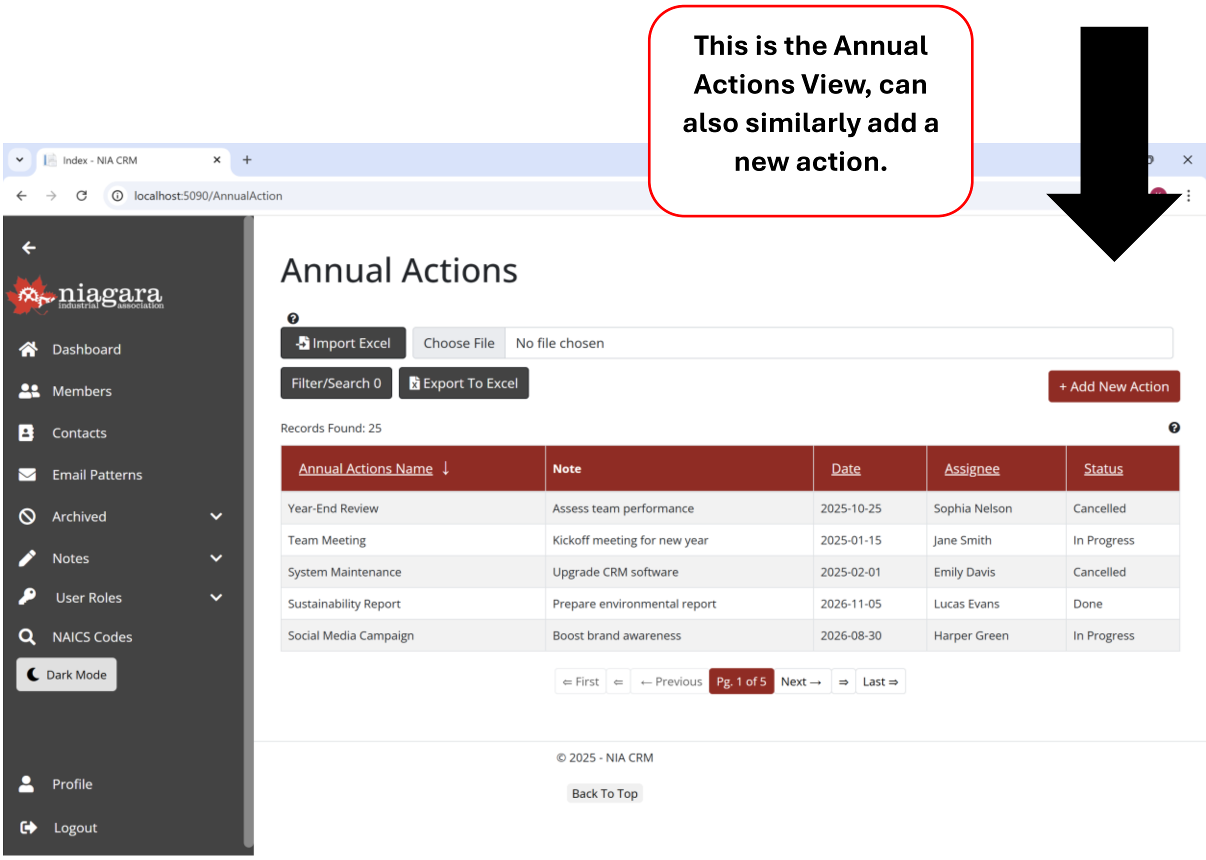
- Opportunities

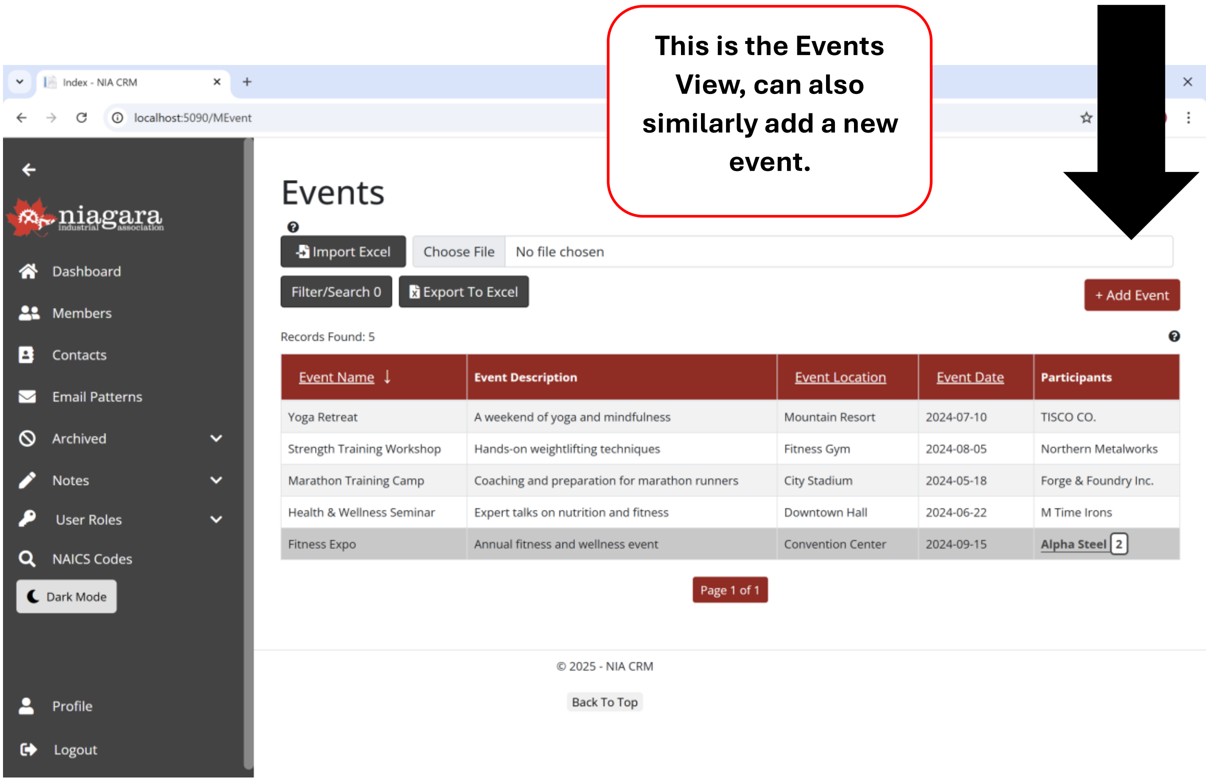
- Strategies
- Annual Actions
- Member Events

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





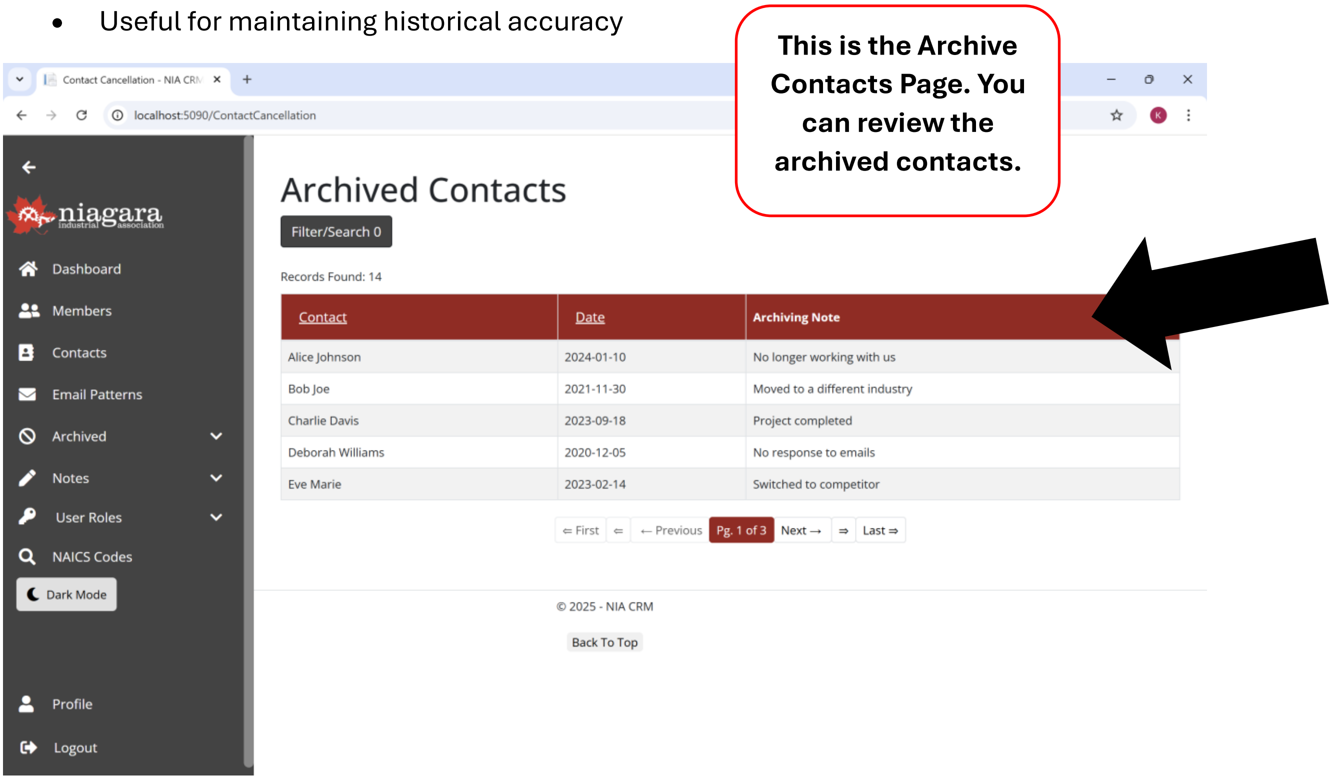



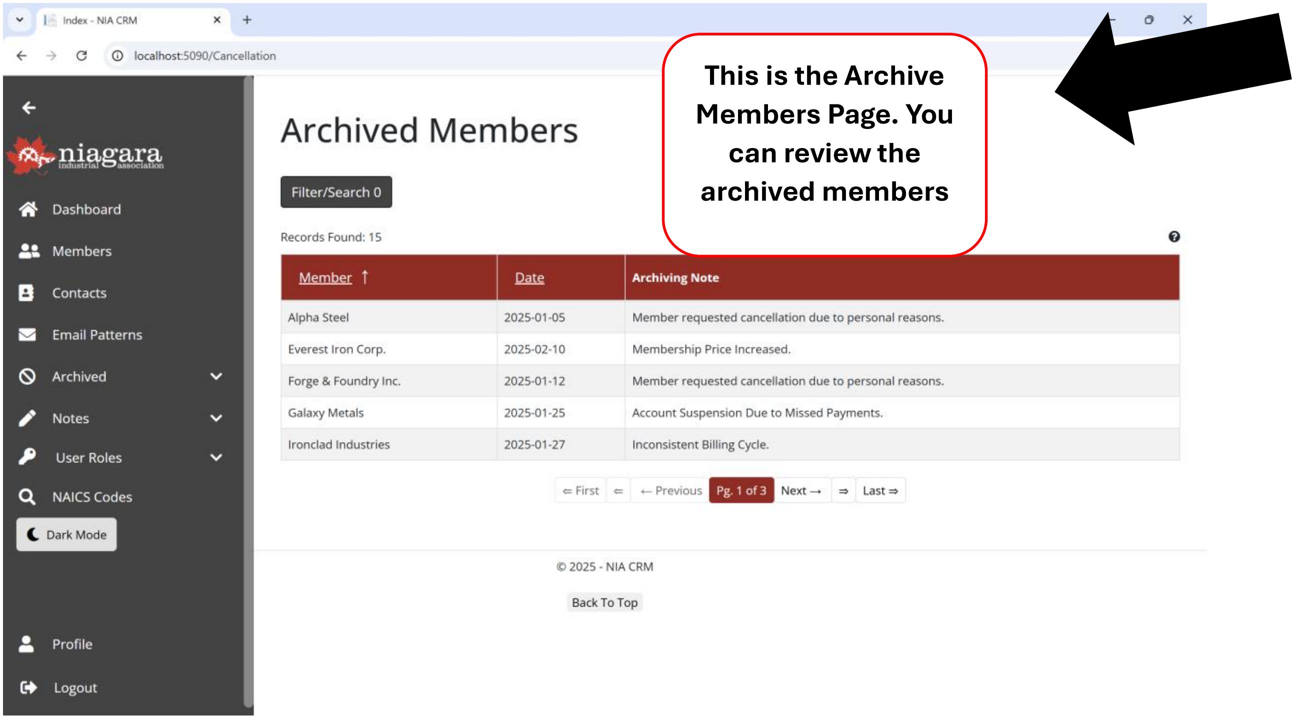

## Archived Section

View and manage previously archived member data.

- View archived members

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



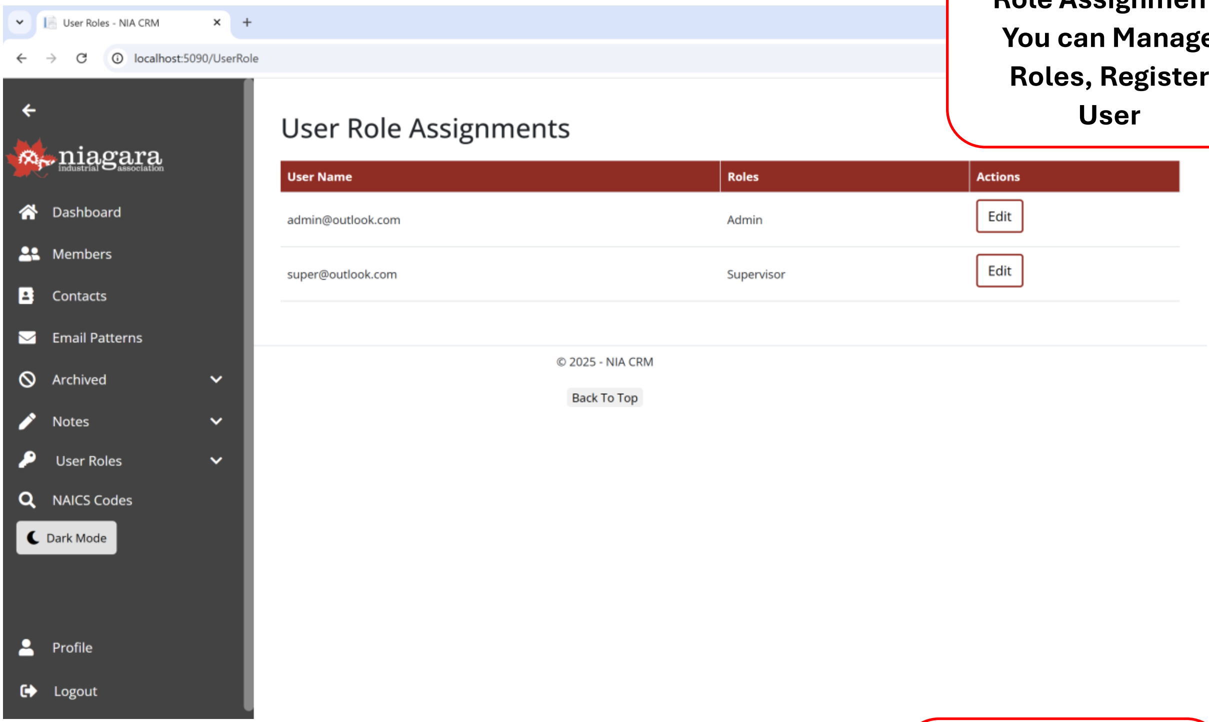




## User Management

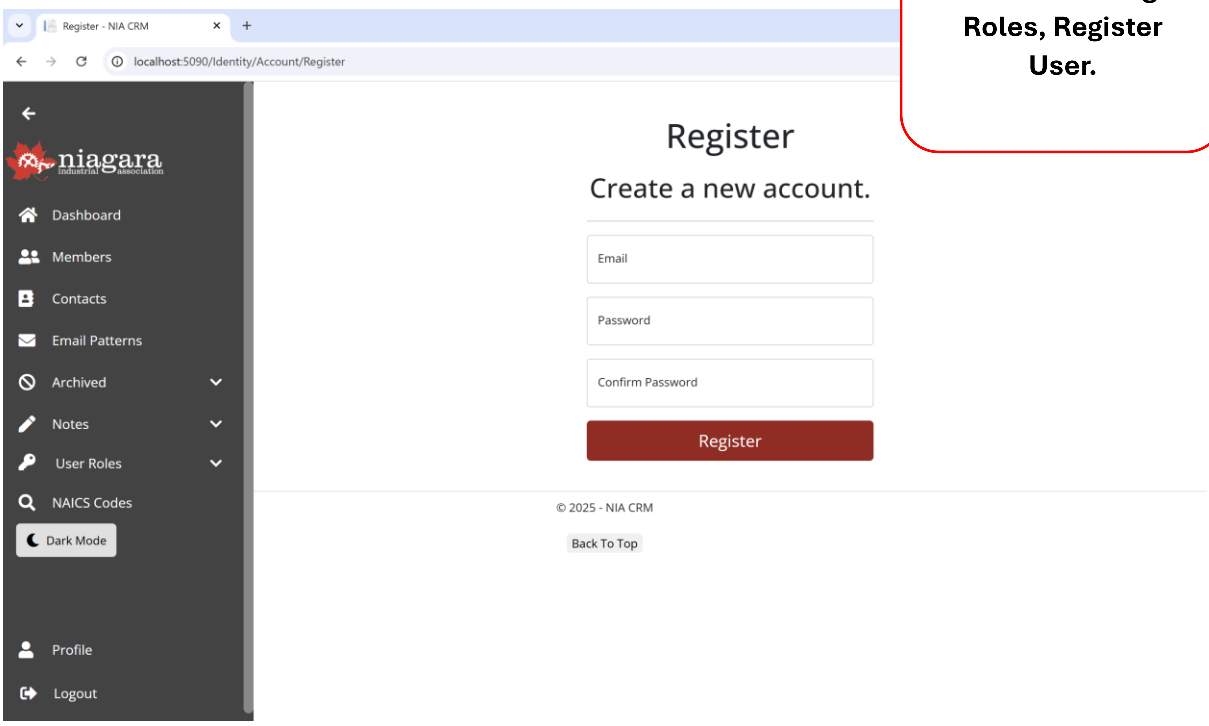
**Features:**

- **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.

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



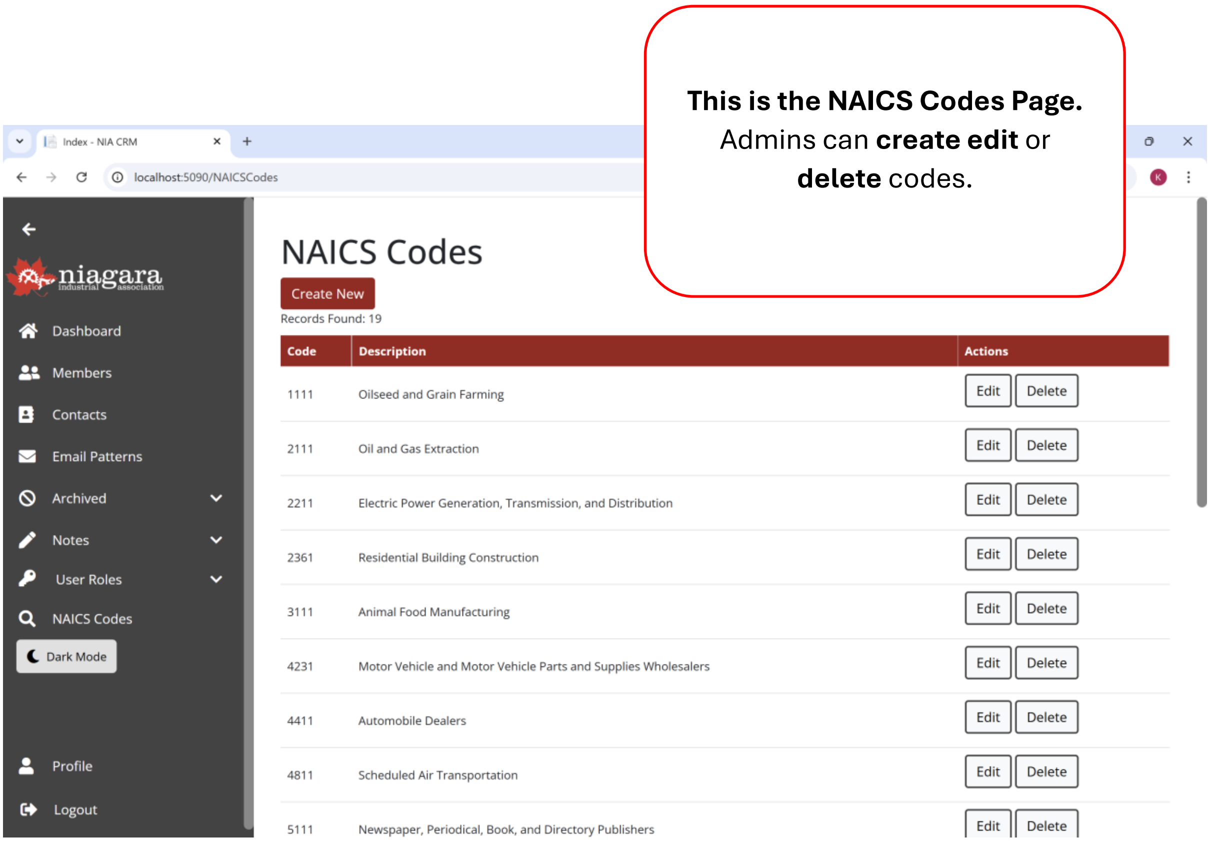

**You can Manage Roles, Register User.**




## NAICS Codes

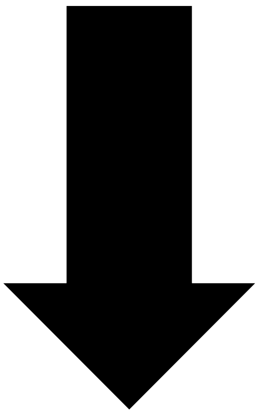
Manage and assign **North American Industry Classification System (NAICS)** codes.

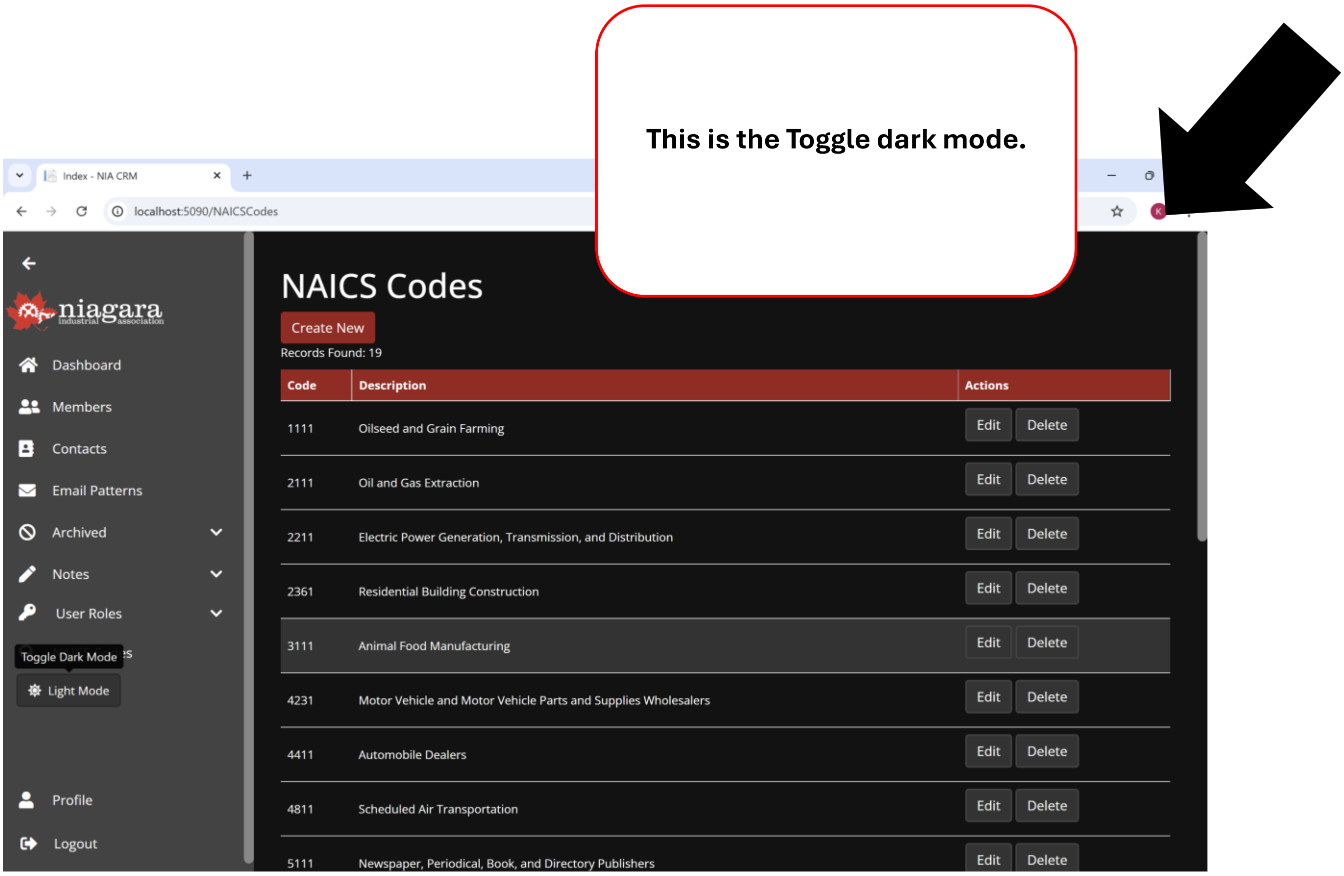
- Admins can **add**, **edit**, or **delete** codes.
- Used in member classification and reports.




## 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.

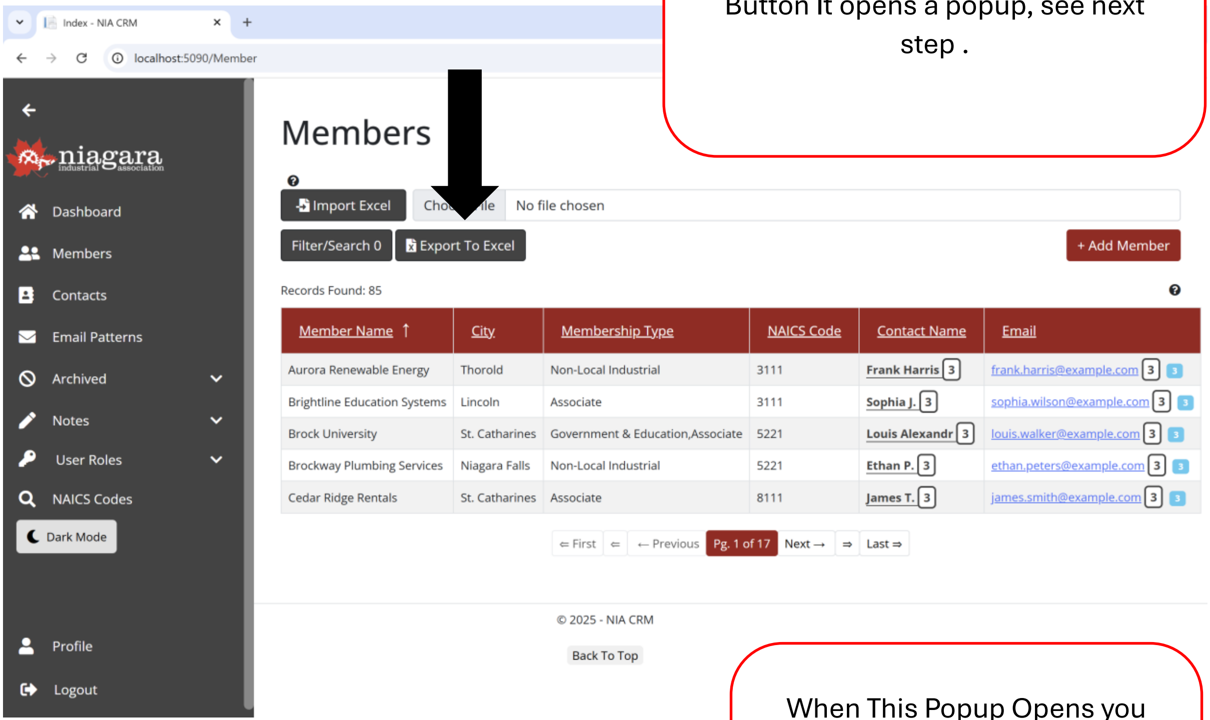




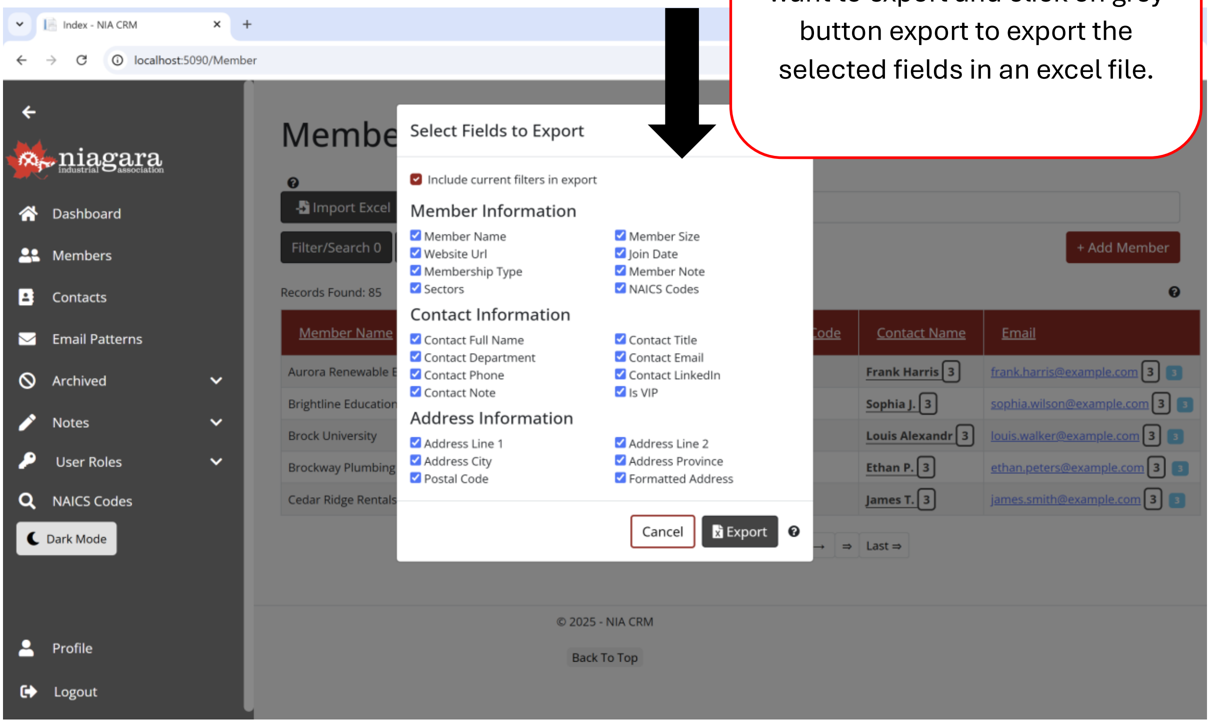

# Export & Import Features

| 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 .

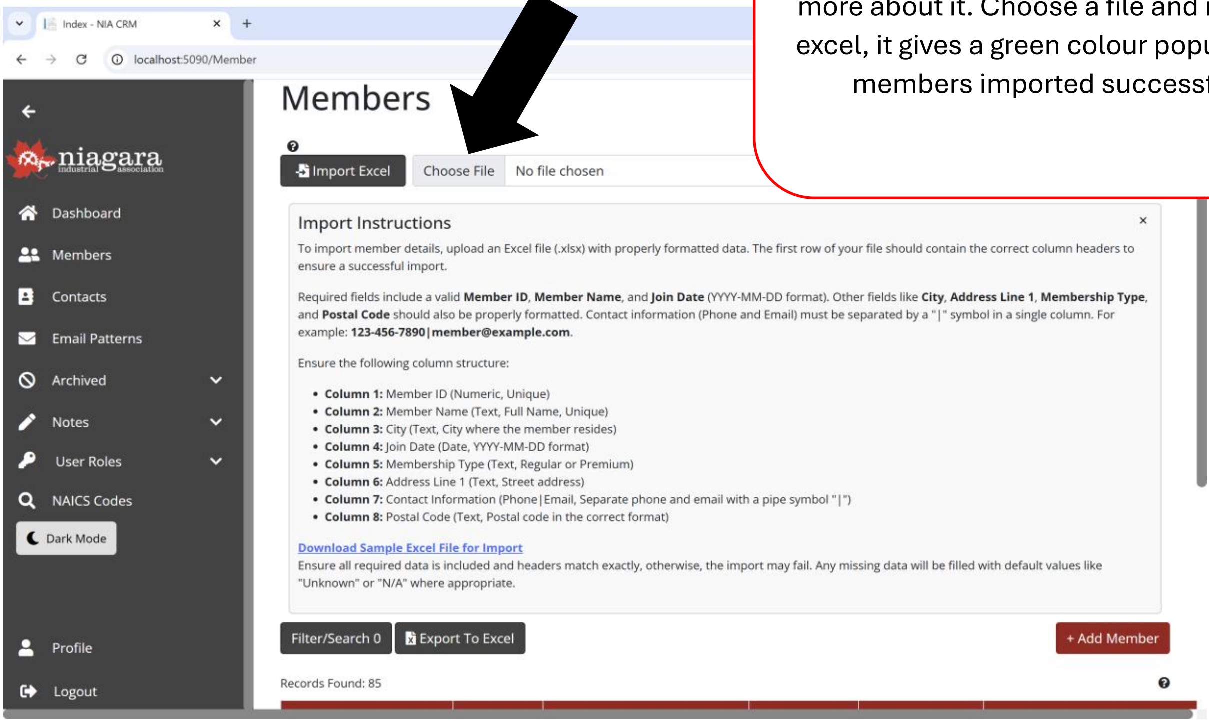



When This Popup Opens you can select any of the field you want to export and click on grey button export to export the selected fields in an excel file.




## For Importing Data

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.**

## 📞 Support

**If you encounter issues or need help:**

**📧 Email: Stellar.Co@nia-crm.local**