

# Dream Team CRM

## User Manual


The Dream Team Customer Relationships  
Manager how to

# Login and Sign Up

  
Sign in

1 First create an account by filling in the form.

2 To login to an existing account, navigate to "Already have an account? Sign in"



Sign up

First Name \*

Last Name \*

Email Address \*

Department \*

Role \*

Password \*

Repeat Password \*

✗ Password has more than 5 characters.


✗ Password has a number.

✗ Password has a capital letter.

✗ Passwords match.

SIGN UP

[Already have an account? Sign in](#)



Sign in

Email Address \*

Enter your Email

Password \*

Enter your Password

SIGN IN


[Forgot password?](#)

[Don't have an account? Sign Up](#)

4 Click the update button, to update personal details.

M

Mark Zuckerberg



Email Address: zucky987@gmail.com

Department: Executive

Role: CEO

Current Password \*

New Password

Repeat password

SAVE CHANGES

✗ Password has more than 5 characters.

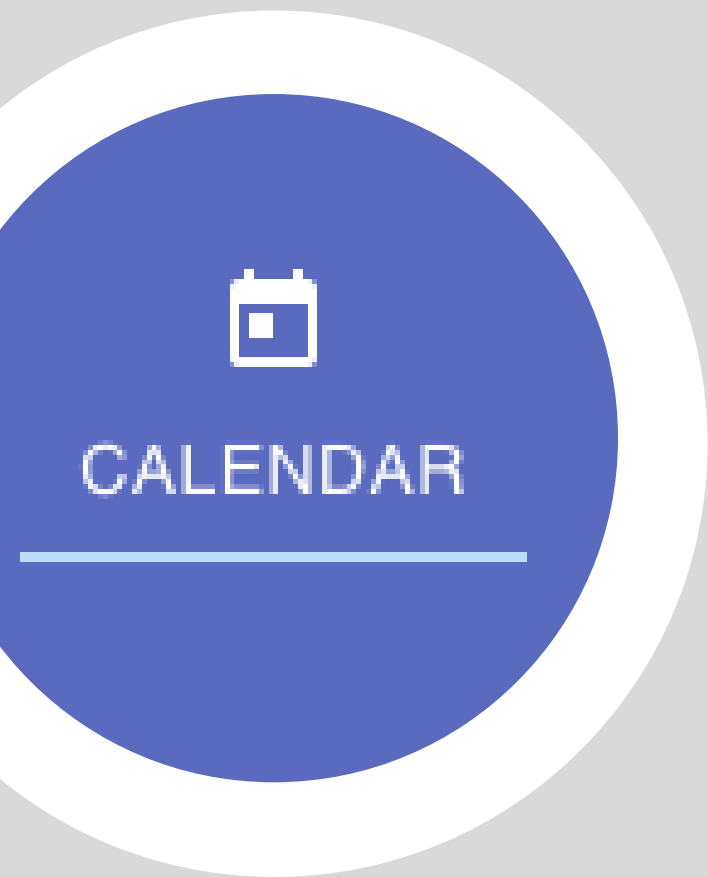
✗ Password has a number.

✗ Password has a capital letter.

✗ Passwords match.

3 To update account details including account password, navigate to the profile tab.

# Meetings



1

Click on the "Add new meeting" button and fill out the form to create a new meeting

Meeting Details

Select...

Title\*

Agenda

Attendees (Name 1, Name 2)

Date\*  
dd/mm/yyyy

Start Time\*  
--:-- --

End Time\*  
--:-- --

SAVE

2

Meetings are stored in upcoming and past based on the meeting end time

CONTACTS

EMAILS

CALENDAR

NOTES

ORDERS

PROFILE

LOGOUT

UPCOMING

PAST

+ ADD NEW MEETING

Title

Agenda

Thu Oct 28 2021

9:00 AM - 10:00 AM

Contact

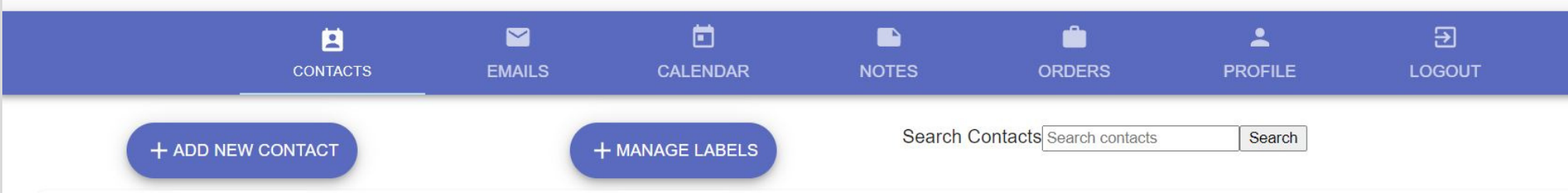
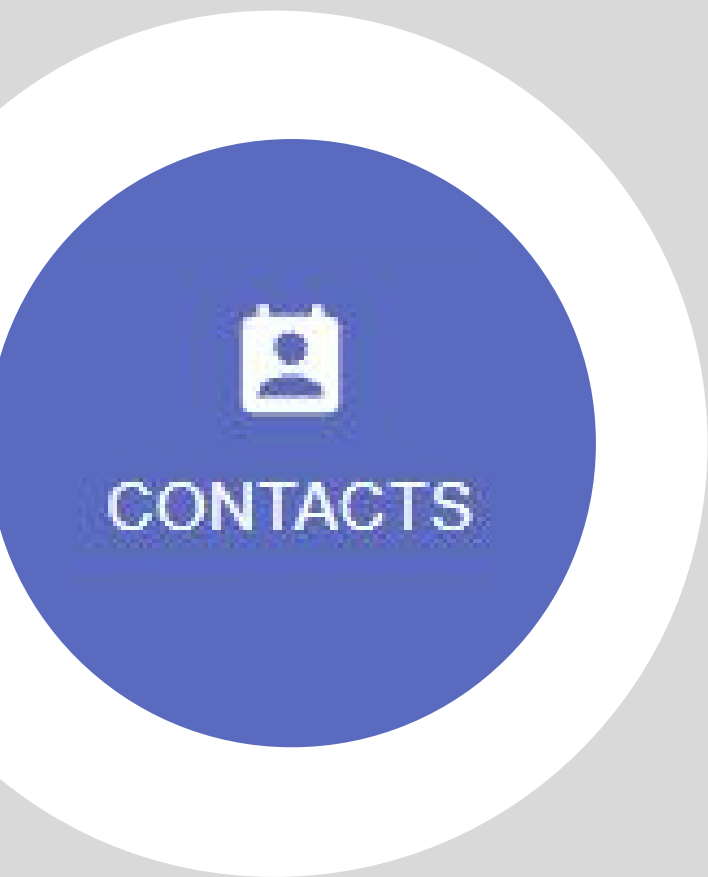
Update meeting details by clicking here

Add and edit meeting notes here (maximum one note per meeting)

Delete

Mark as completed to push the meeting into the "Past" tab

# Contacts



1 Click on the "Add new contact" button and fill out the form to create a new contact

2 View contacts



3 Email contact

4

Update contact details

5

Delete contact

Add New Contact

First Name \*

Last Name

Business

Relationship

Email Address \*

Phone number

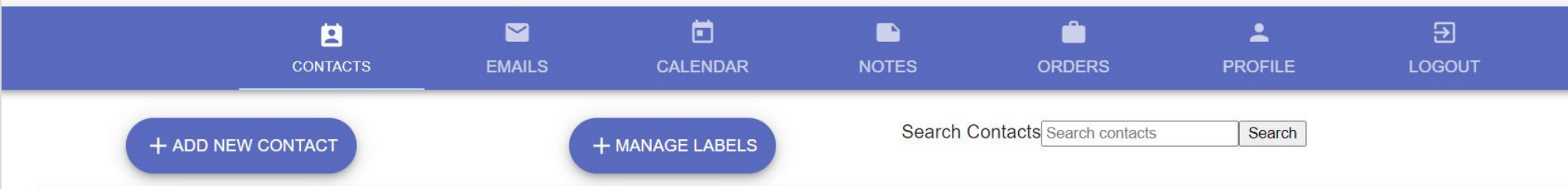
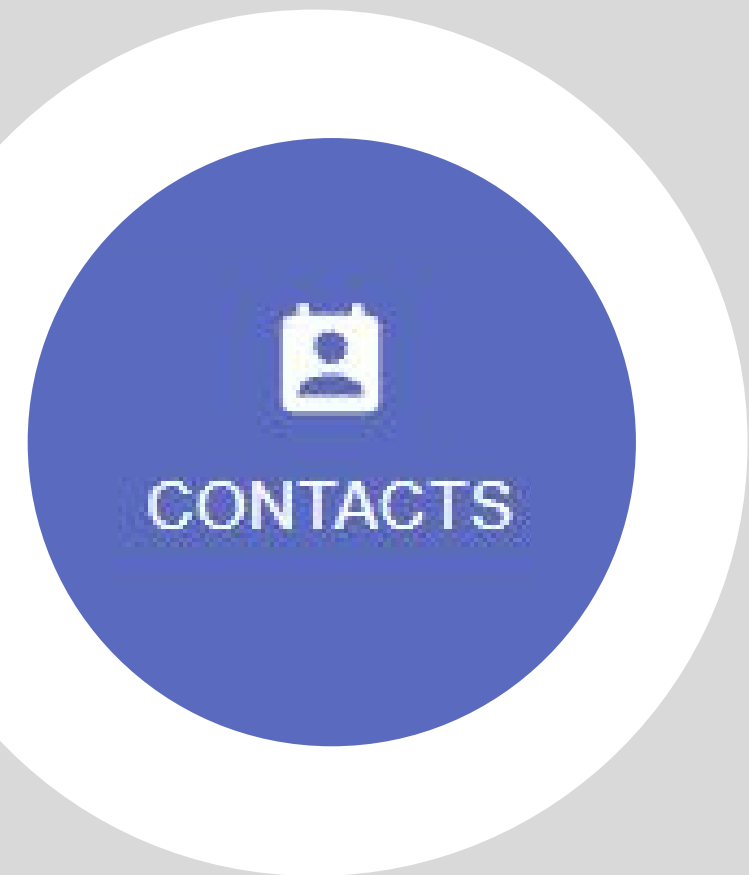
Description

Label this contact

Label

SAVE

# Labels



1

Click on the "Manage Labels" button

2

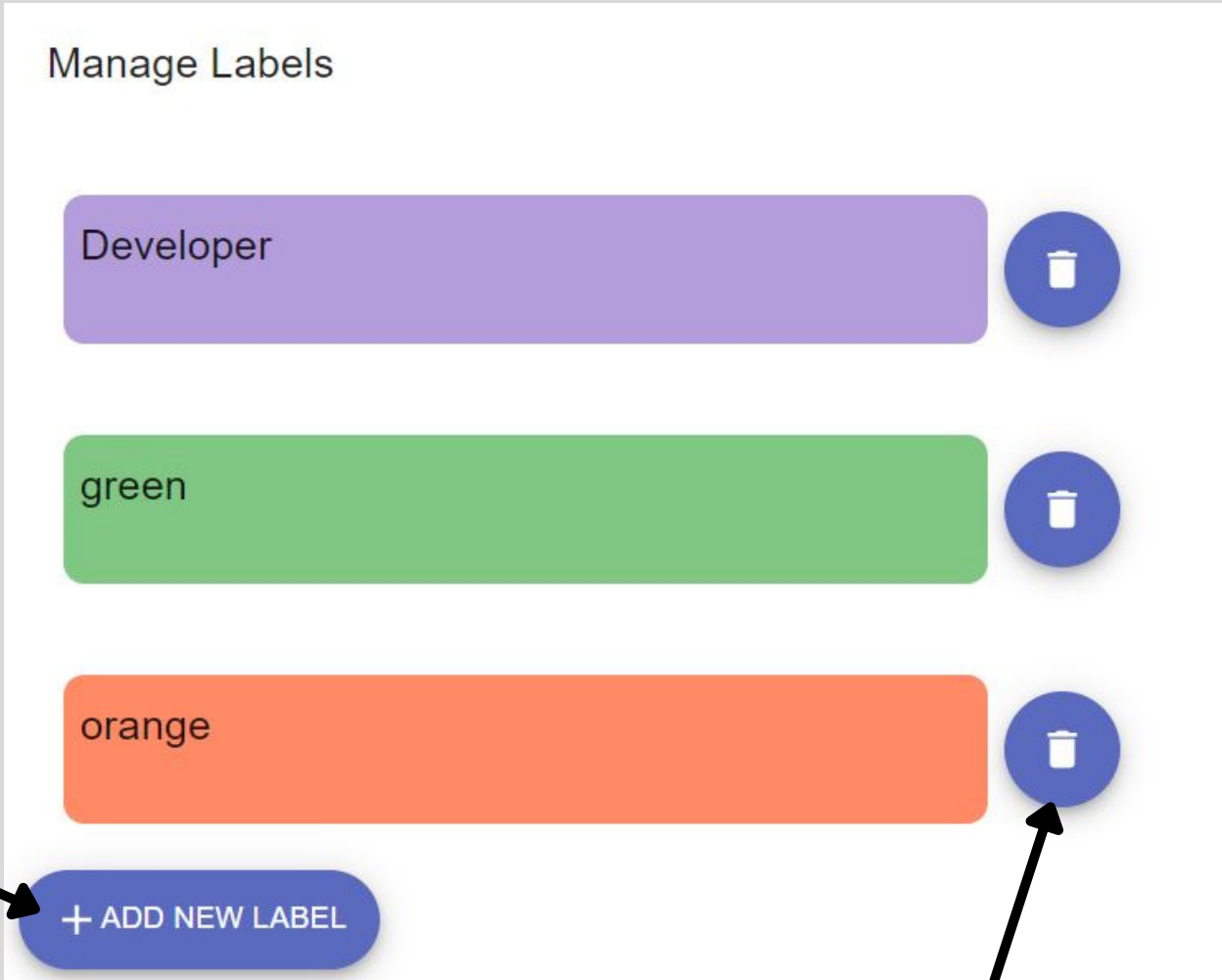
Click on the "Add new label" button and fill out the form to create a new label

Create Label

Title

Colour

SAVE



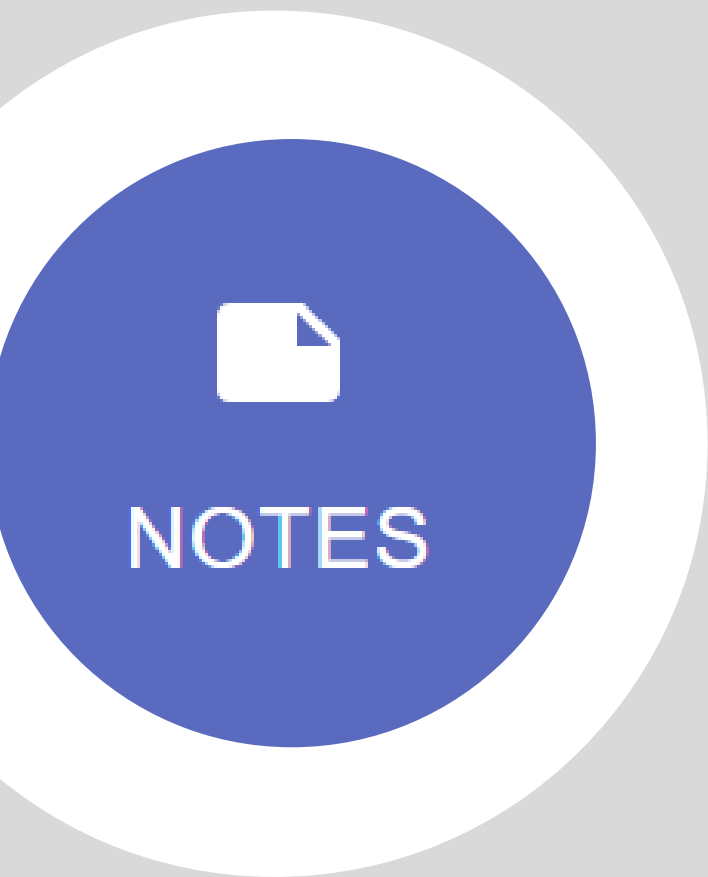
3

View all labels

4

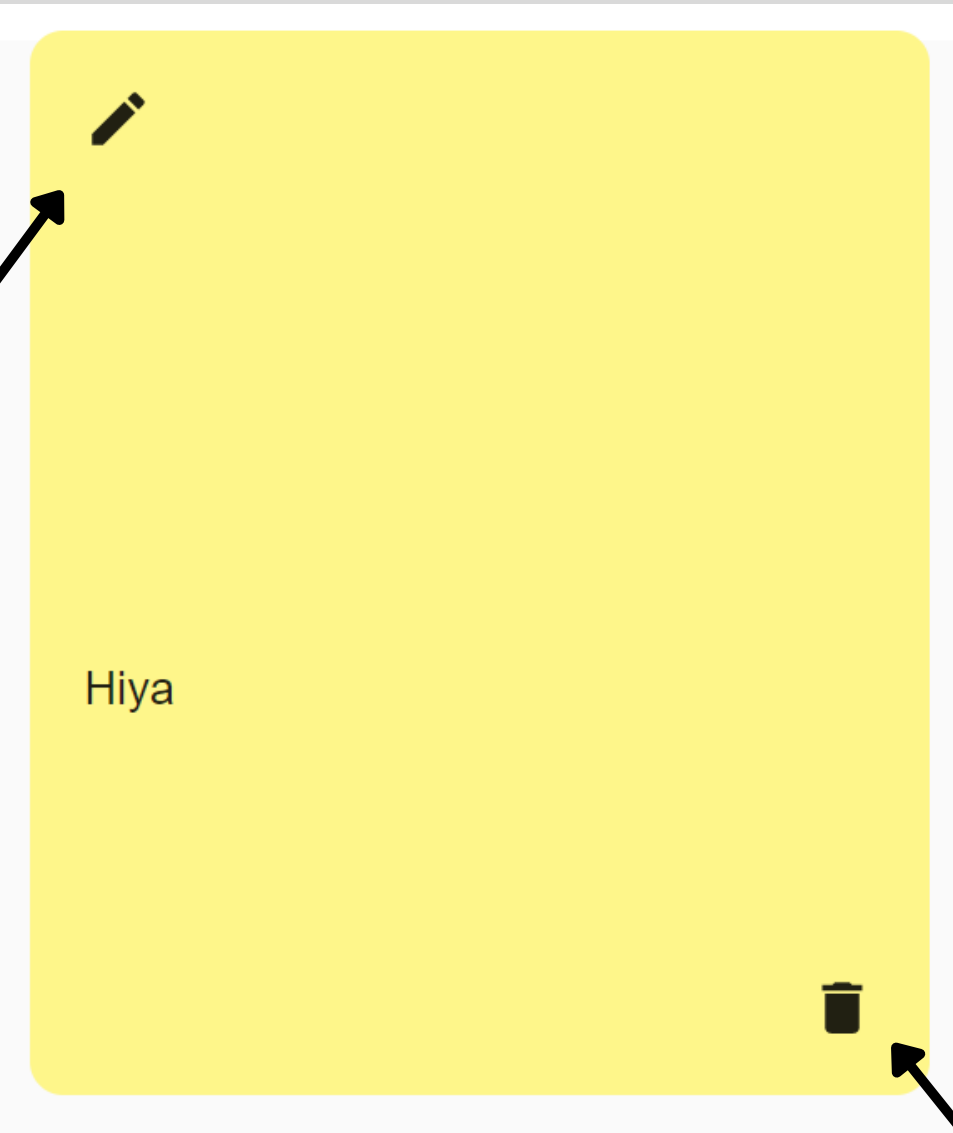
Delete a label

# Notes



1 Search the notes based on the title and content

2 View Notes



3 Edit Notes

Title

Type to add new note\*

New Note

Cancel

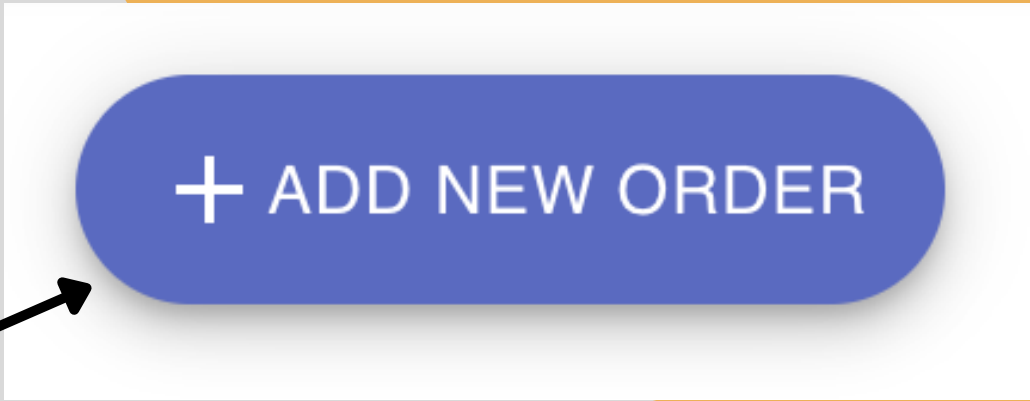
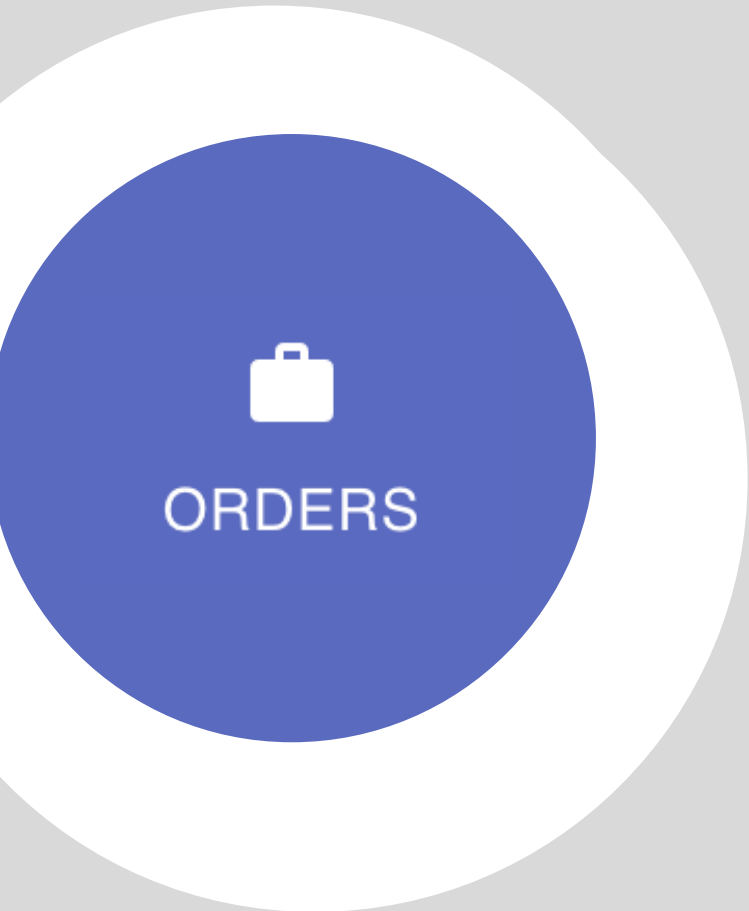
Save

4 Add a new note by clicking Save

5 Delete Note



# Orders



1

Click on the Add button to submit a new order

Add New Order

Assign to contact

▼

Product \*

Amount

Start Date

dd/mm/yyyy

📅

Due Date

dd/mm/yyyy

📅

Order Status

None

Ordered

Delivered

Completed

2

Fill in all order details and assign to a contact before clicking the "Confirm Order" button

Update Order Details

Delete Order

3

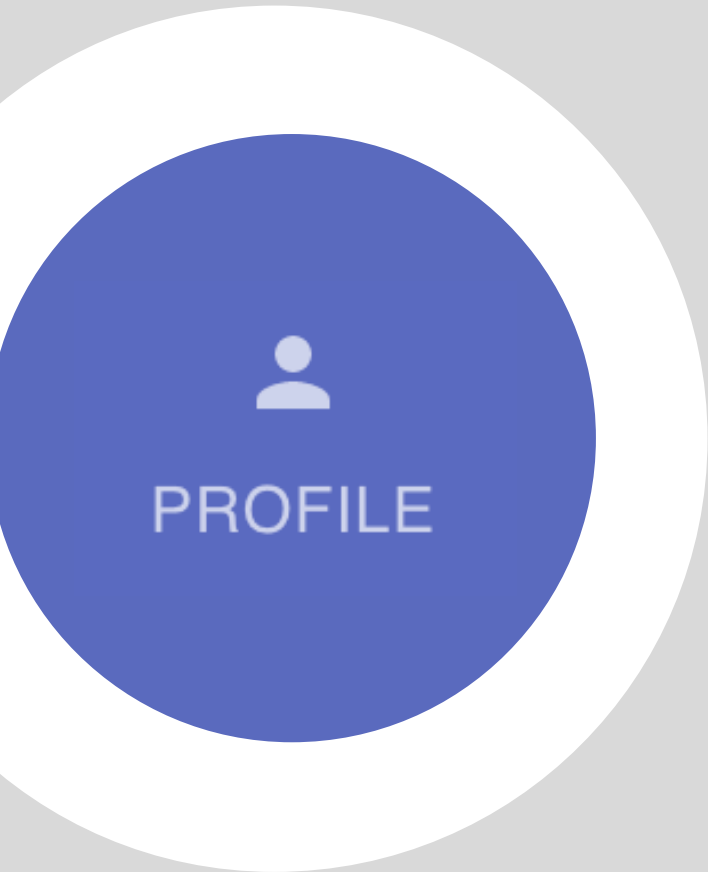
4

Contact	Due 2022-03-01T00:00:00.000Z	Status: Ordered	<div><div>↺</div><div>🗑</div><div>⌵</div></div>
Date ordered: 2022-01-01T00:00:00.000Z	Amount: 3	Product: Product	

5

Click on the dropdown to view all order details

# Profile



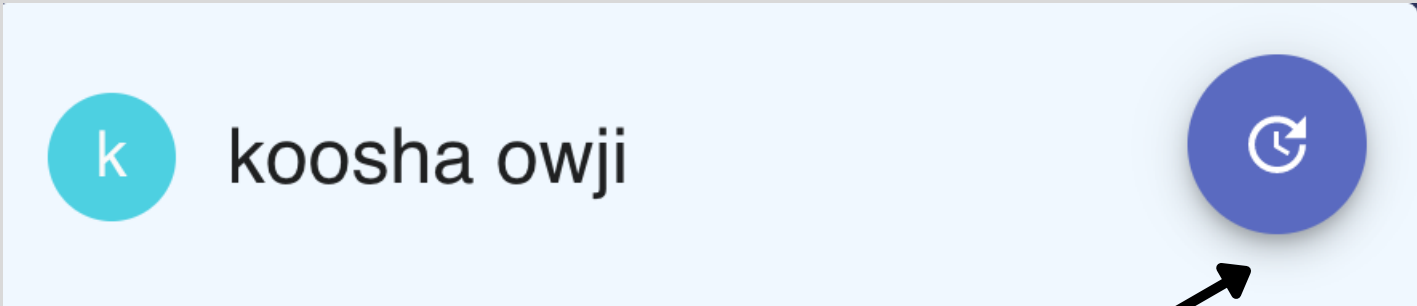
Current Password \*

New Password

Repeat password

SAVE CHANGES

1 Change your current password



2 Update your profile details

Update Profile

First Name

koosha

Last Name

owji

Email Address

koosha@owji.com

Department

sciene

Role

tech

SAVE CHANGES