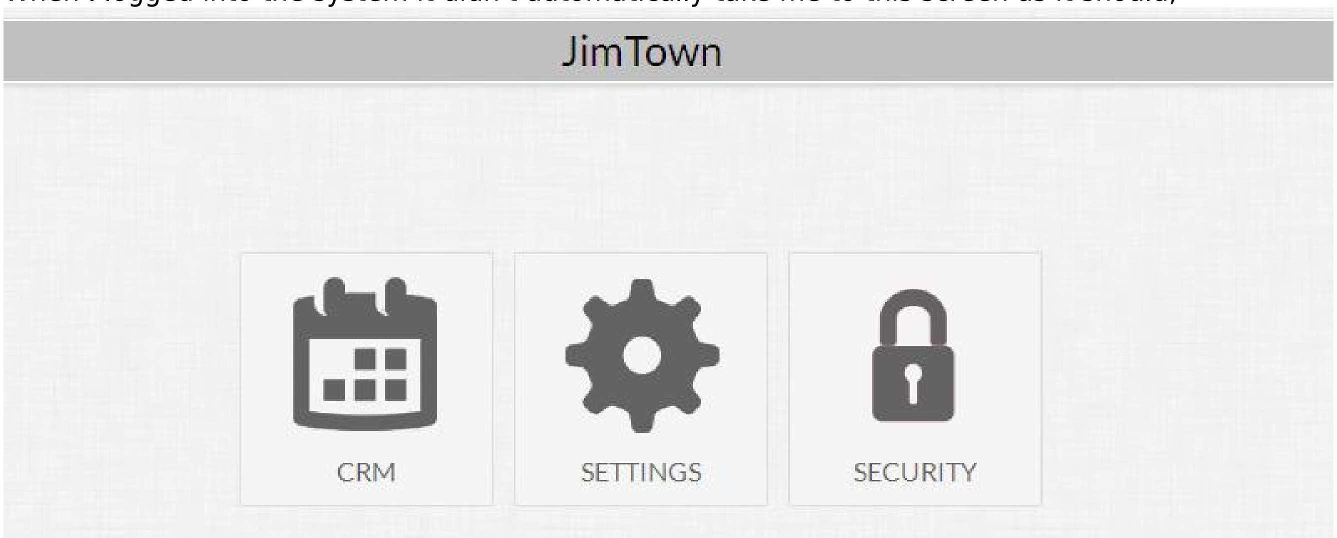
Mahir,

In looking at the CRM product what jumps out to me immediately is a term that we too had to grasp in the past. This term is “Userability”.. the system you have currently needs this.

I will explain. To begin, once registered the cred generator sends a mail, that mail should be titled “Thank you for registering, Your Log In details are below” then when a user logs in the first time they should be walked through the initial setup process one screen at a time beginning with the screen below.

When I logged into the system it didn't automatically take me to this screen as it should;



Once a first time user lands here a few things should happen. It should notify a user that this is the main system setup screen, welcome them and when a user hover on a button it should turn a different color, it does that now, but an info pop up should come up notifying the user what each button is meant for. Right now it just takes you to the blank dbase. I would also consider adding more menus on this screen such as setting up users, rights and permissions. The system should automatically assume the first time log in user for a company is the SUPER ADMIN.

You have another e-Maze movie...these are excellent! I would cut those slides up and embed them into the setup process to give a user the ability to watch the appropriate screen they need at each stage. I would also add one of those “NEED HELP” chat icons that hover on pages even if only for the initial setup.

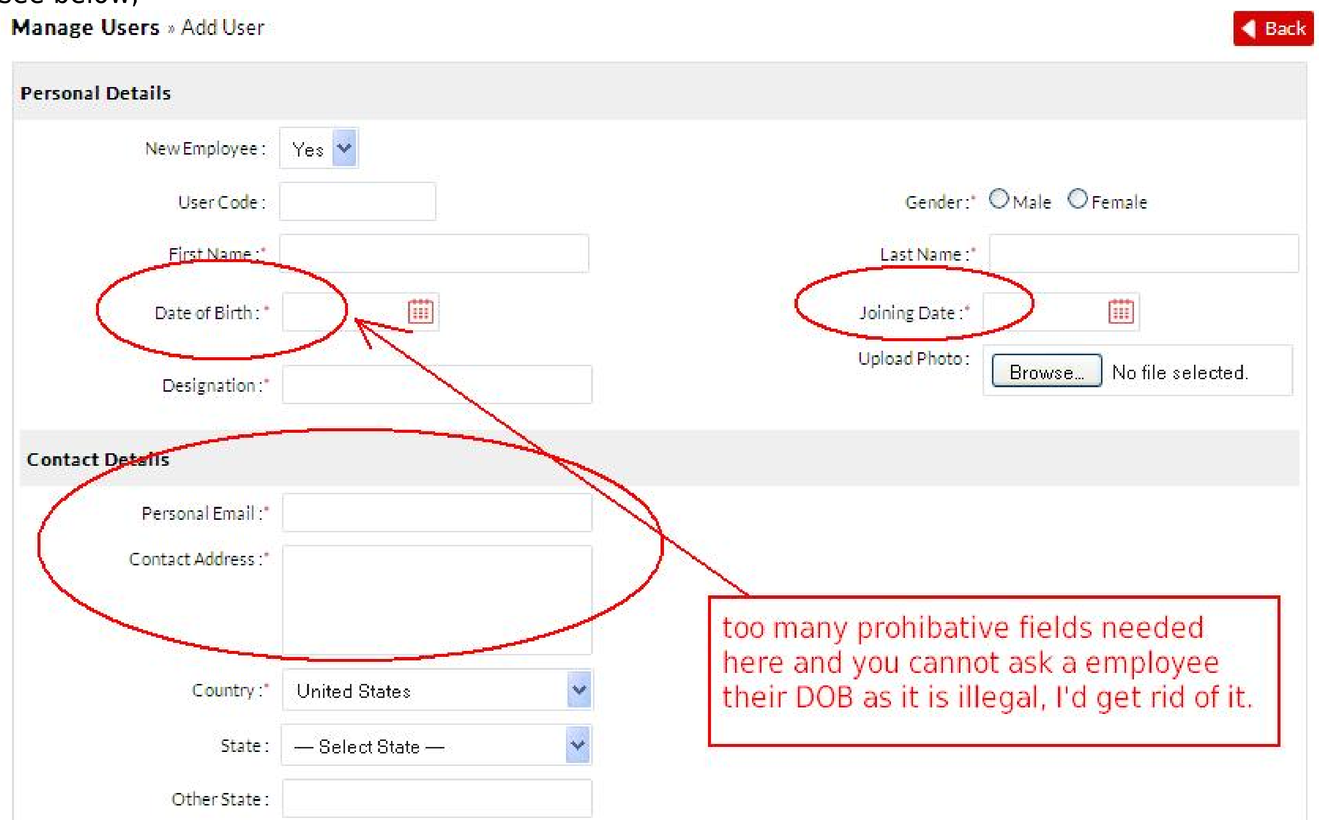
Try to uncomplicate the menu screens and declutter them. Think **EZ**... I found myself having to search around looking for various screens.

The initial setup screen should

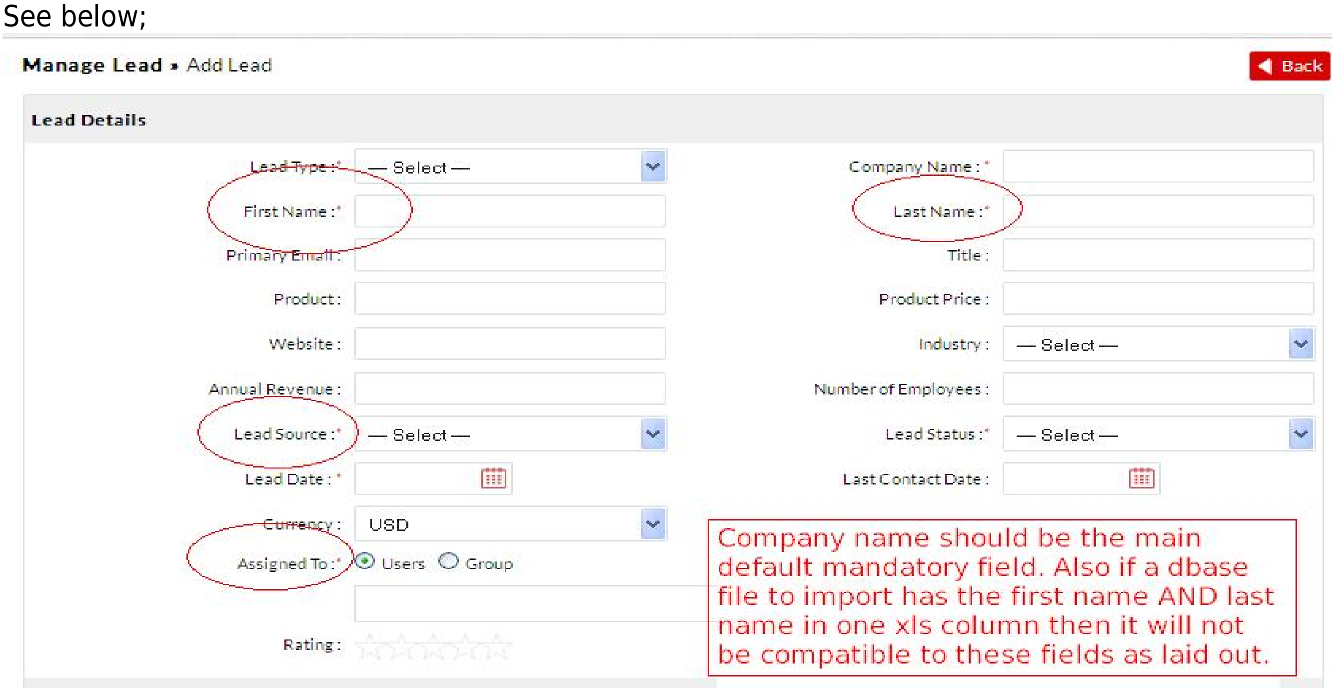
- allow user to setup the default dashboard view for their system
- allow user to add other users and setup their rights and access rights
- Allow user to setup the default view for leads, prospects or clients
- allow user to set up document vault and SDF control
- allow user to go into a lead pool and alllocate data to individual salespeople
- allow user to setup their default company details.
- allow user to set up a graphical analytics package on their personal dashboard
- allow user to have a birds eye view of all their salespeople's activity at a glance

Moving ahead, on your data entry forms you have way too many “mandatory” fields required. This is sure to create kickback on data entry.

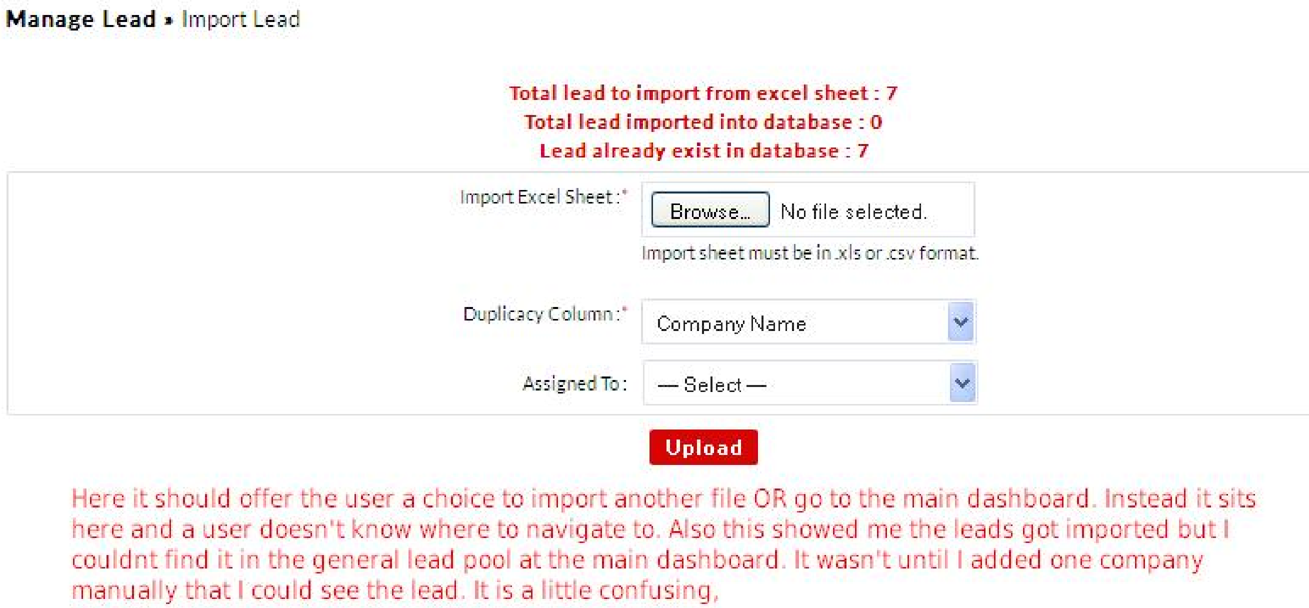
see below;



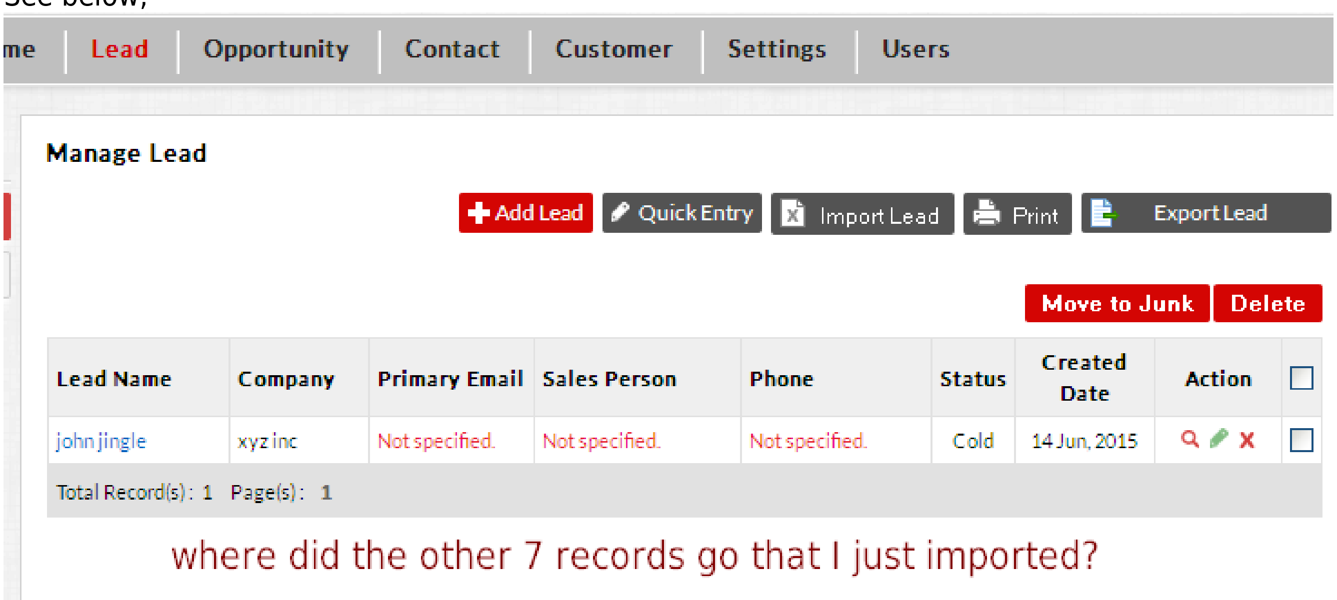
the same is true for when a user is adding a lead manually.
See below;



When I imported a sample file it showed me this.
See below;



I ckicked the Lead Menu button and saw this.
See below;



From my perspective I know all the functions are here....it needs to be presented better so an ADMIN User sets up the company templates and the salesperson user can add individual records, view their database and communicate with their account base.

An ADMIN user should setup the overall SYSTEM functionality, the Templates, the dashboard view, the communication rights FIRST then a standard user can only add more one at a time but data can NOT exported nor can they allocate mass data to their database. Without the SUPER ADMIN doing it personally.

As anADMIN user I would expect to log in and see a general dashboard view layout as such.
See below;

Add Lead | Quick Entry | Import Lead | Print | Export Lead

Leads

always default driver field

Move to | Delete

Lead Name	Company	Primary Email	Sales Person	Phone	Status	Created Date	Action	
john jingle	xyz inc	Not specified.	Not specified.	Not specified.	Cold	14 Jun, 2015		

Total Record(s) : 1 Page(s) : 1

pull down or drag and drop into different dbases

Prospects

Lead Name	Company	Primary Email	Sales Person	Phone	Status	Created Date	Action	
john jingle	xyz inc	Not specified.	REP 1	Not specified.		14 Jun, 2015		

Total Record(s) : 1 Page(s) : 1

these should be sortable fields if they aren't as of now.

Customers

Lead Name	Company	Primary Email	Sales Person	Phone	Status	Created Date	Action	
john jingle	xyz inc	Not specified.	REP 1	Not specified.		14 Jun, 2015		

In addition to this ADMIN view I would want to add some graphical analytics for a salesmanager. Perhaps anaytics such as

- total LEADS
- total Lead to Prospect conversions
- total Prospect to Customer conversions***(I will elaborate on this point another time)**

From the main ADMIN dashboard a ADMIN could drill down into every individual salespersons analytic pack to see each reps conversion volume per week, month or any other defined timeline.

The loader is a little limited only accepting XLS or CSV files not DBF or XLSX etc... actually it should allow the ADMIN user to identify his fields on the setup and link their data accordingly BUT company name should ALWAYS be the default mandatory.

On the Security settings I would allow ADMIN to setup if they want the company CRM accessible from their IP only or PC and Mobile etc..right now it only offers to block IP feature...or so it seems.

Overall I see most of what I expected is there but needs userability as mentioned and some consolidation to make the user experience easier and less frustrating. Once the system is setup the salesperson user should be able to log in and view their own data, add but never delete data (I'd use conditions such as Active/Inactive so the data is protected from destruction instead) and finally disposition their own lead data.