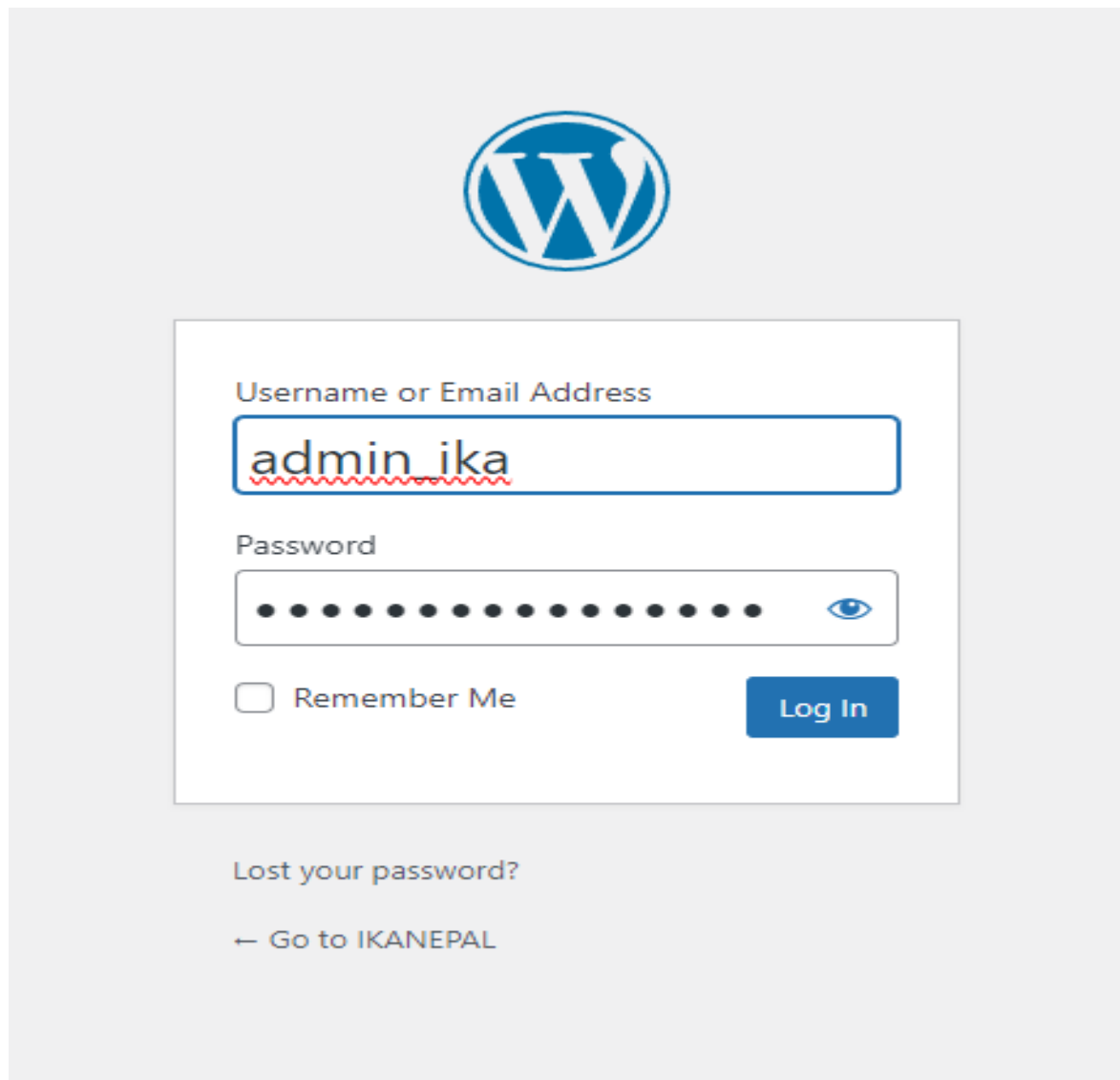


## Guidelines: Jetpack CRM

### 1. Getting Started:

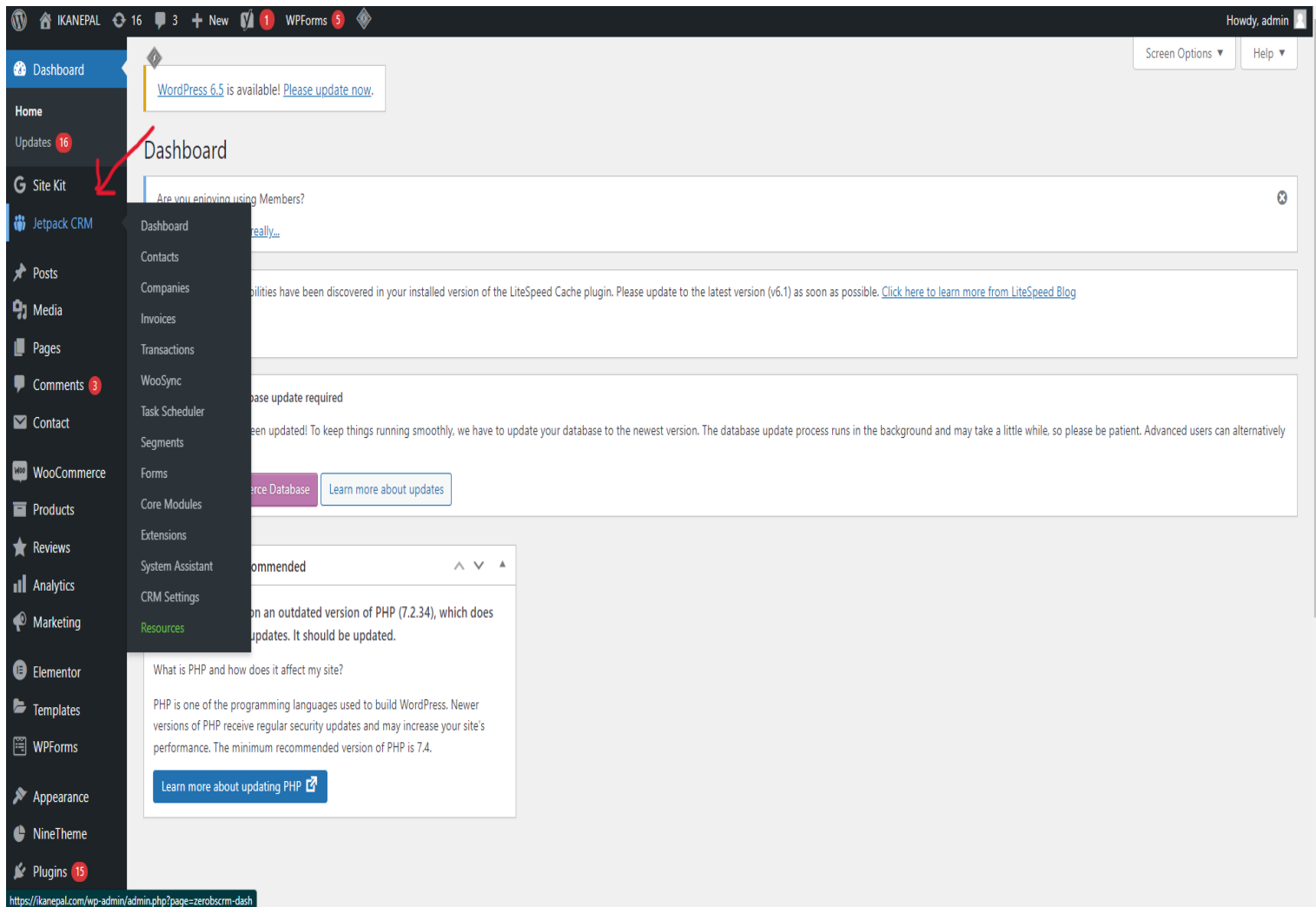
Sign Up/Login: Visit your website with the following link: <https://ikanepal.com/wp-admin/> and log in

The below interface will open:

The image shows the WordPress login interface. At the top center is the WordPress logo, a blue 'W' inside a circle. Below the logo is a white rectangular box containing the login form. The form has two input fields: 'Username or Email Address' and 'Password'. The 'Username or Email Address' field contains the text 'admin\_ika' with a red squiggly underline. The 'Password' field is filled with black dots and has a blue eye icon to its right. Below the password field is a checkbox labeled 'Remember Me'. To the right of the checkbox is a blue button labeled 'Log In'. Below the login box, there is a link 'Lost your password?' and a link '← Go to IKANEPAAL'.

After providing the proper credentials, the main dashboard will open with access as per the user role.

Below is the interface of the main dashboard:



You will find the Jetpack CRM on the left side of the screen with the red arrow pointing. By clicking you will be directed to the dashboard of Jetpack CRM.

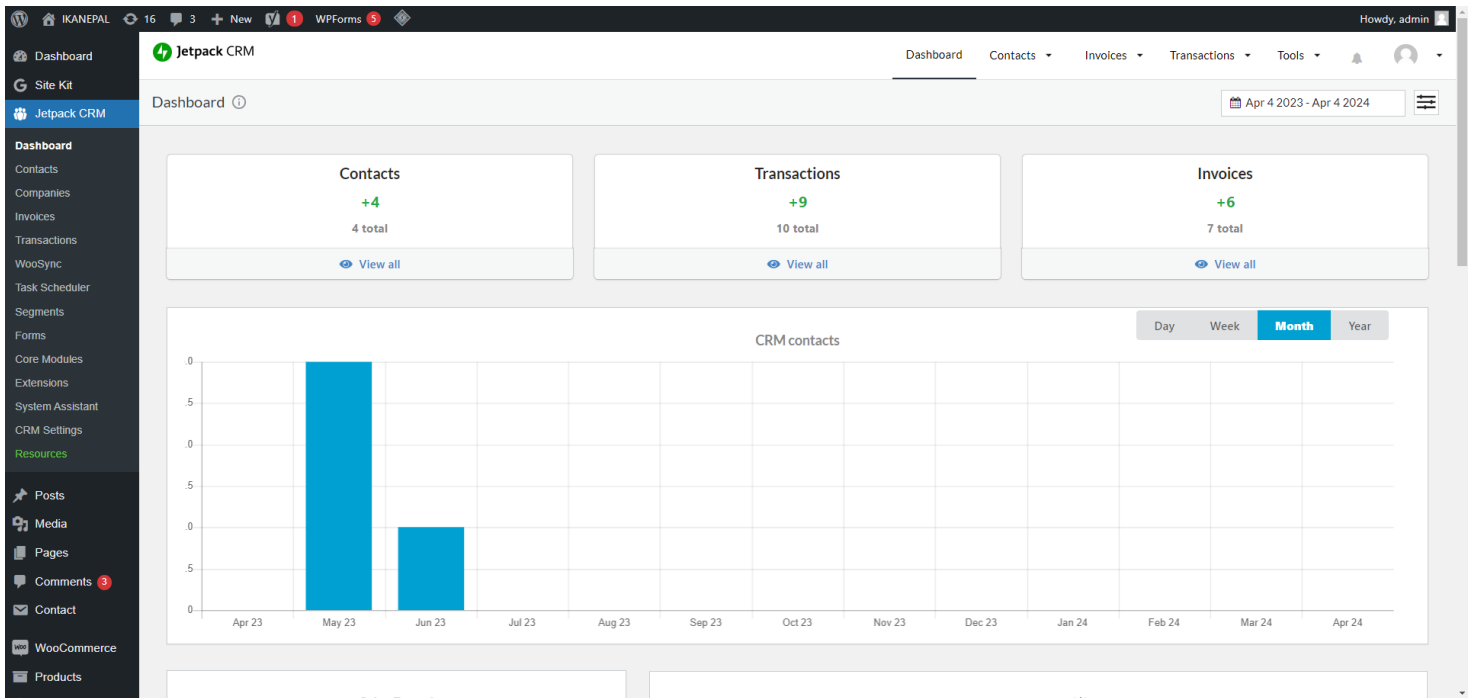
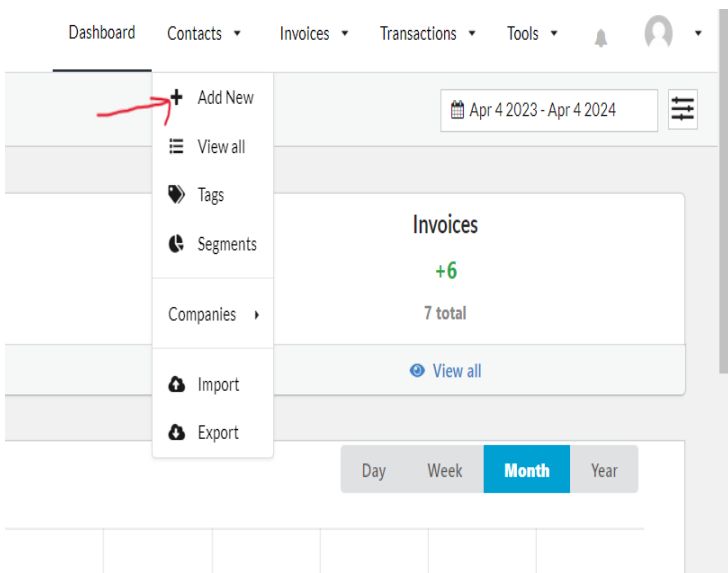


Fig: Dashboard of Jetpack CRM

You will see **Contact, Invoice, and Transaction** on the top right side of your screen.

## 2. Adding Contacts:

Navigate to the "Contacts" tab to add new contacts. Click on "Add New Contact" and fill in the necessary details such as name, email, phone number, etc. as shown in the image below:



Contact Details

Status: 

Select

Prefix: 

Select

First Name: 

e.g. John

Last Name: 

e.g. Doe

Main Address

Address Line 1:

Address Line 2:

City: 

e.g. New York

State: 

e.g. Kings County

Post Code: 

e.g. 10019

Country: 

Select

Mobile Telephone: 

e.g. 877 2733050

Email: 

e.g. john@gmail.com

Remarks:

Contact Actions

Save Contact

Contact Tags

Enter tags

Add

Client Portal

Save your contact, or add an email to enable Client Portal functionality

Social Profiles

example

example

example

Company

Type to assign Company

## View/Edit Contacts:

You can view and edit contact details by clicking on the contact's name. You can also add notes, set reminders, and assign tags here.

## Importing Contact Files:

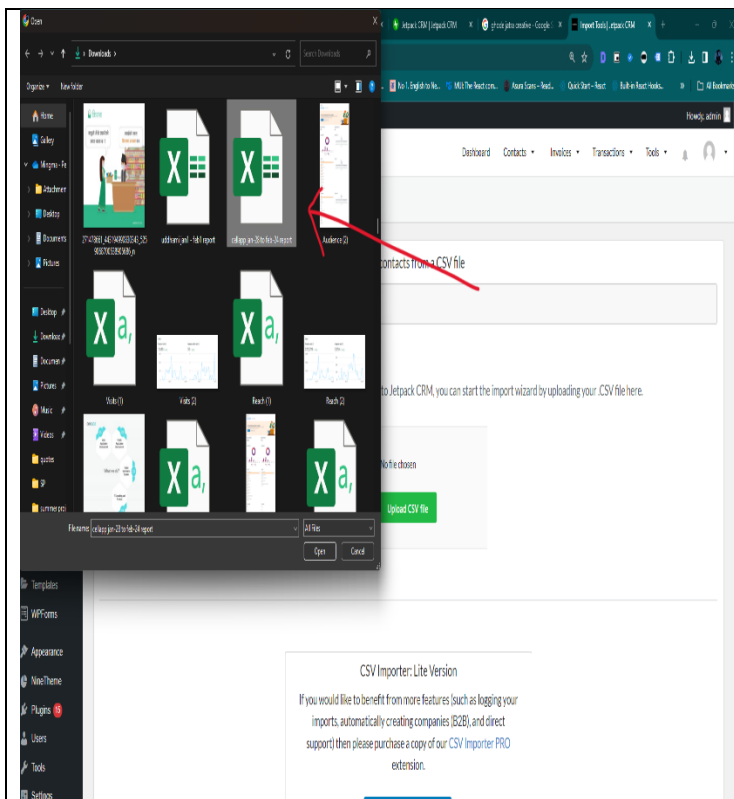
Excel files can be imported to add new contacts.

### Step 1: Click import

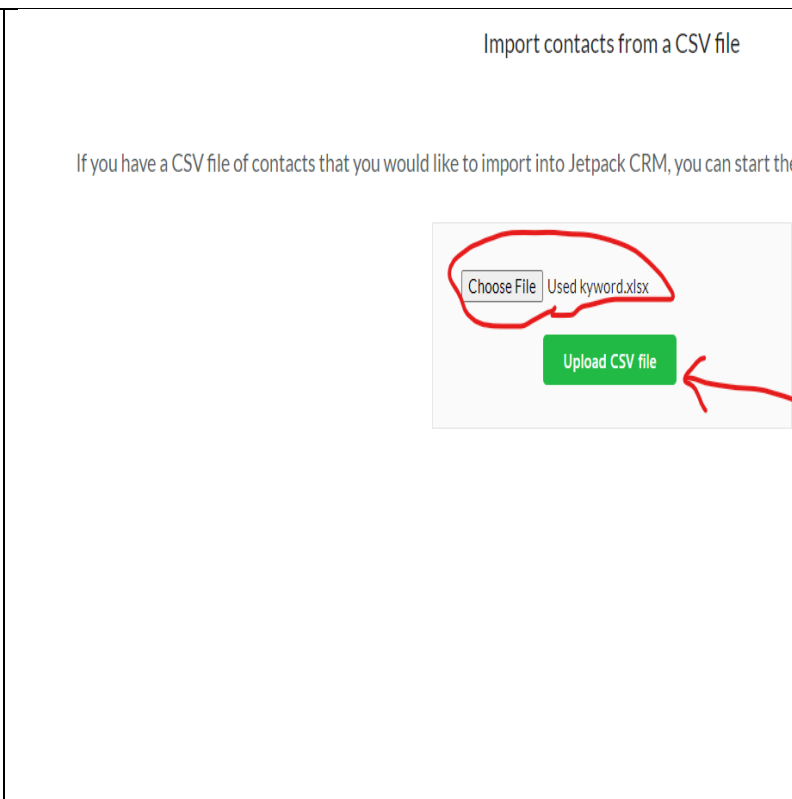
The screenshot shows the Jetpack CRM dashboard. The left sidebar menu is open, and the 'Import' option is highlighted with a red arrow. The main content area shows a summary for 'Invoices' with a count of +6 and 7 total, along with a 'View all' link. The top navigation bar includes links for Dashboard, Contacts, Invoices, Transactions, and Tools.

### Step 2: Choose a file

The screenshot shows the 'CSV Importer Lite: 1. Upload' screen in Jetpack CRM. A red arrow points to the 'Choose File' button, which is next to the text 'No file chosen'. Below it is a green 'Upload CSV file' button. The interface includes instructions on how to import contacts from a CSV file and a section for the 'CSV Importer: Lite Version' with a link to 'Get CSV Importer PRO'.



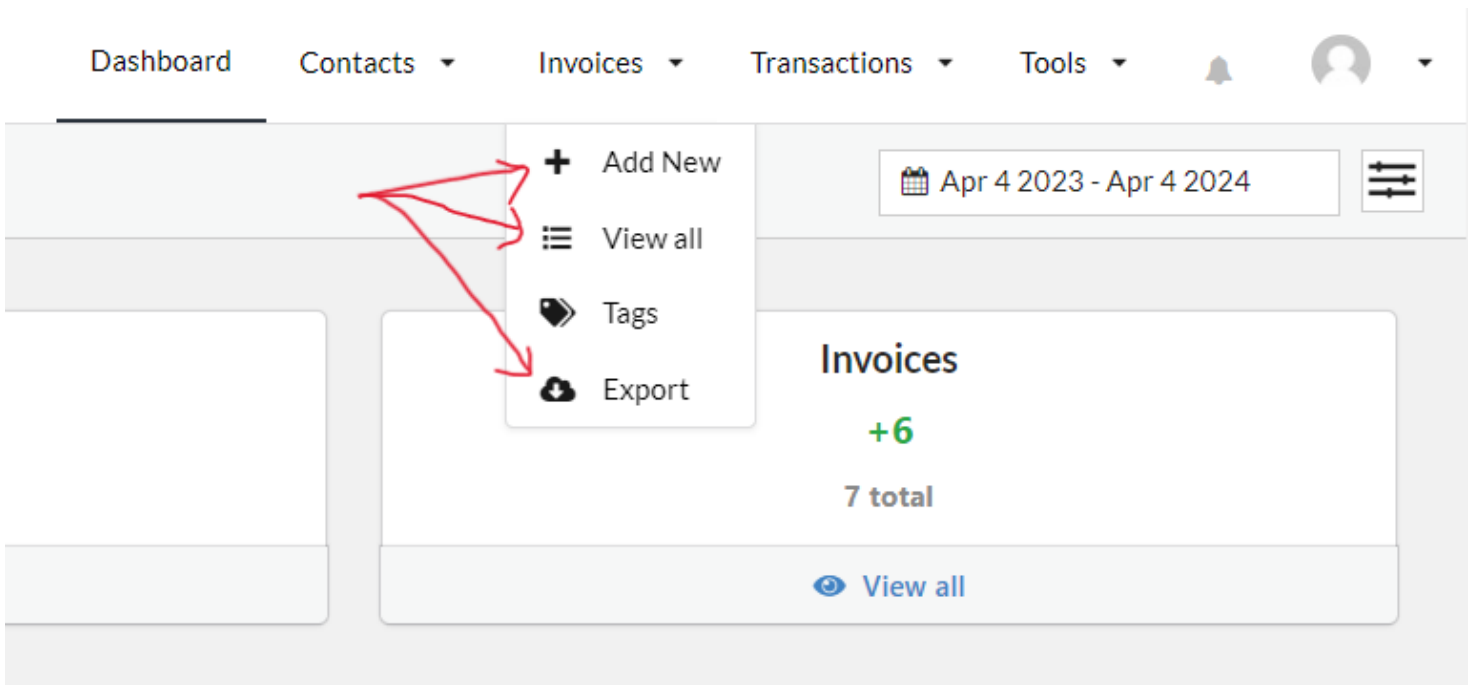
Step 3: Select an Excel file.



Step 4: Upload the file

### 3. Adding Invoices:

Generate and manage invoices for your deals. Navigate to the "Invoices" tab to create new invoices, send them to clients, and track their payment status. View all and export your data.





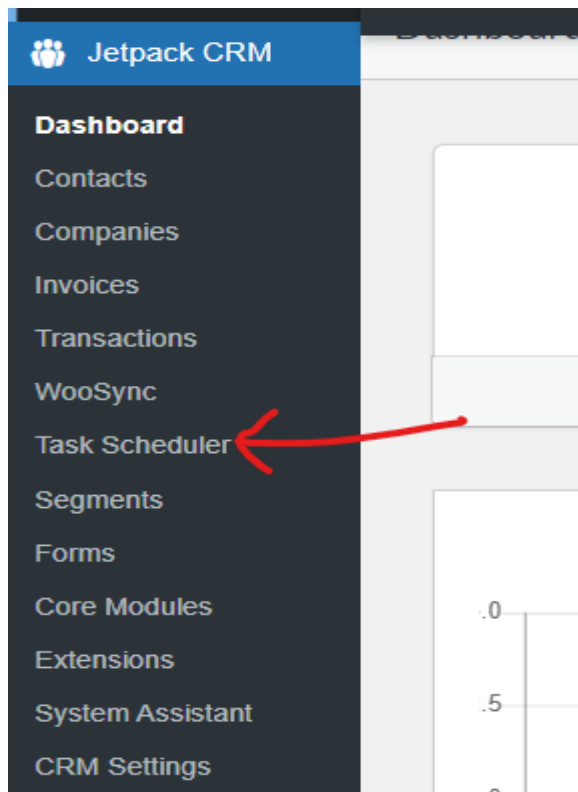
## Add New:

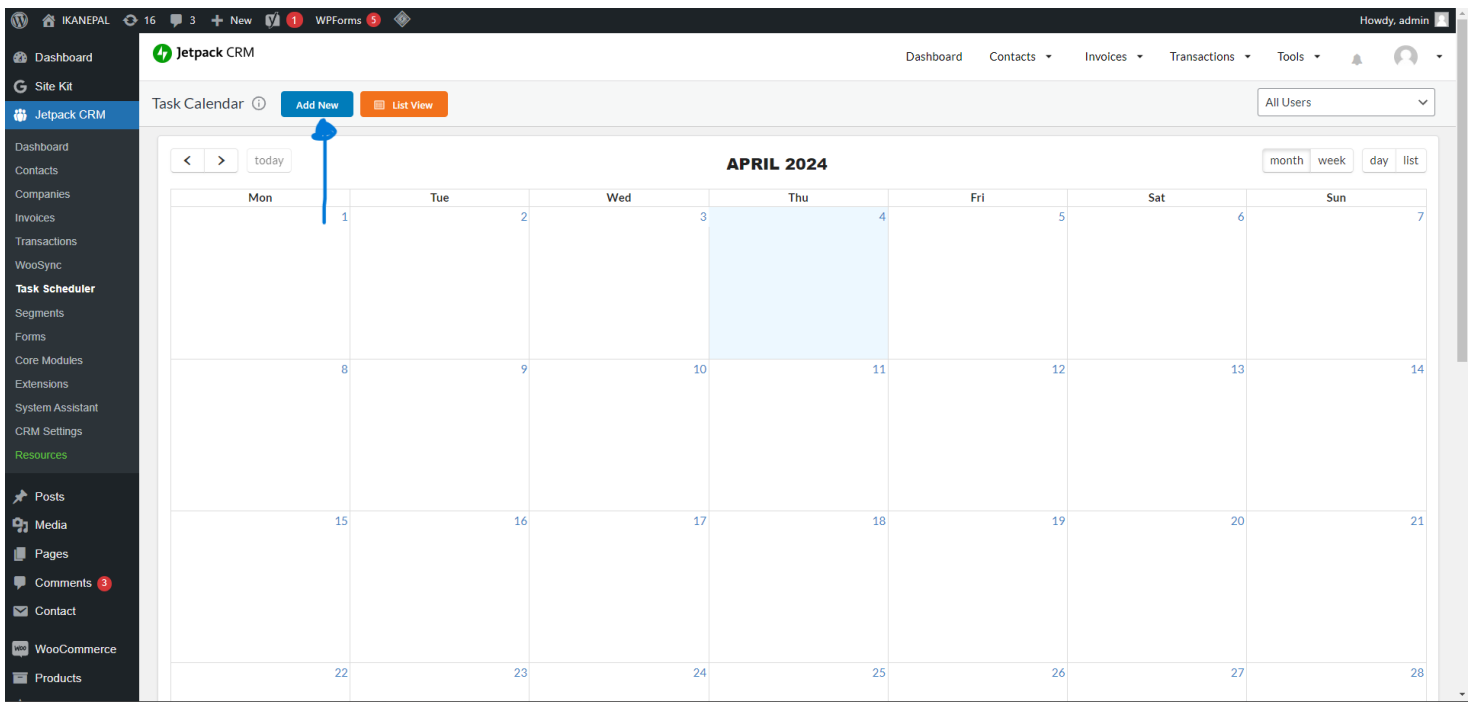
The screenshot shows the 'New Transaction' form in Jetpack CRM. The form is titled 'New Transaction' with a help icon. It includes a 'Transaction unique ID' field with the value 'cmt\_660e50c992010'. Below this is a 'Transaction Status' dropdown set to 'Succeeded'. The 'Transaction Name' field is empty. The 'Transaction Value (\$)' field contains '0.00'. The 'Transaction Date' field is set to 'dd-mm-yyyy' with a calendar icon. The 'Type' dropdown is set to 'Sale'. The 'Description' field is empty. On the right side, there is a 'Transaction Actions' section with a 'Save Transaction' button. Below that is a 'Transaction Tags' section with an 'Enter tags' input and an 'Add' button. A 'SUGGESTED TAGS' section shows 'Product: Edgeband'. At the bottom, there is an 'Assign Transaction to' section with 'Contact' and 'Company' options, each with a text input field.

Fill in the required information to add the transactions.

## 5. Task Management:

Navigate to the “Task Scheduler” on the left side of the screen.





Click on the "add new" tab to add new tasks, task information, set due dates, and mark them as complete when done.

A screenshot of the Jetpack CRM 'New Task' form. The form is titled 'New Task' and includes a 'View Calendar' button and a 'View List' button. The form is divided into two main sections: 'Task Information' and 'Task Actions'. The 'Task Information' section contains fields for 'Task Name...', 'Start time' (04-04-2024 @ 07:45), 'End time' (04-04-2024 @ 08:45), a dropdown menu for 'None', a 'Task Description...' text area, and checkboxes for 'Remind CRM member 24 hours before' and 'Show on Calendar'. There is also a 'Contact' field with a placeholder 'Contact name or email...'. The 'Task Actions' section includes a 'Save Task' button and a 'Task Tags' section with an 'Enter tags' input and an 'Add' button. The user's name 'Howdy, admin' is visible in the top right corner.



