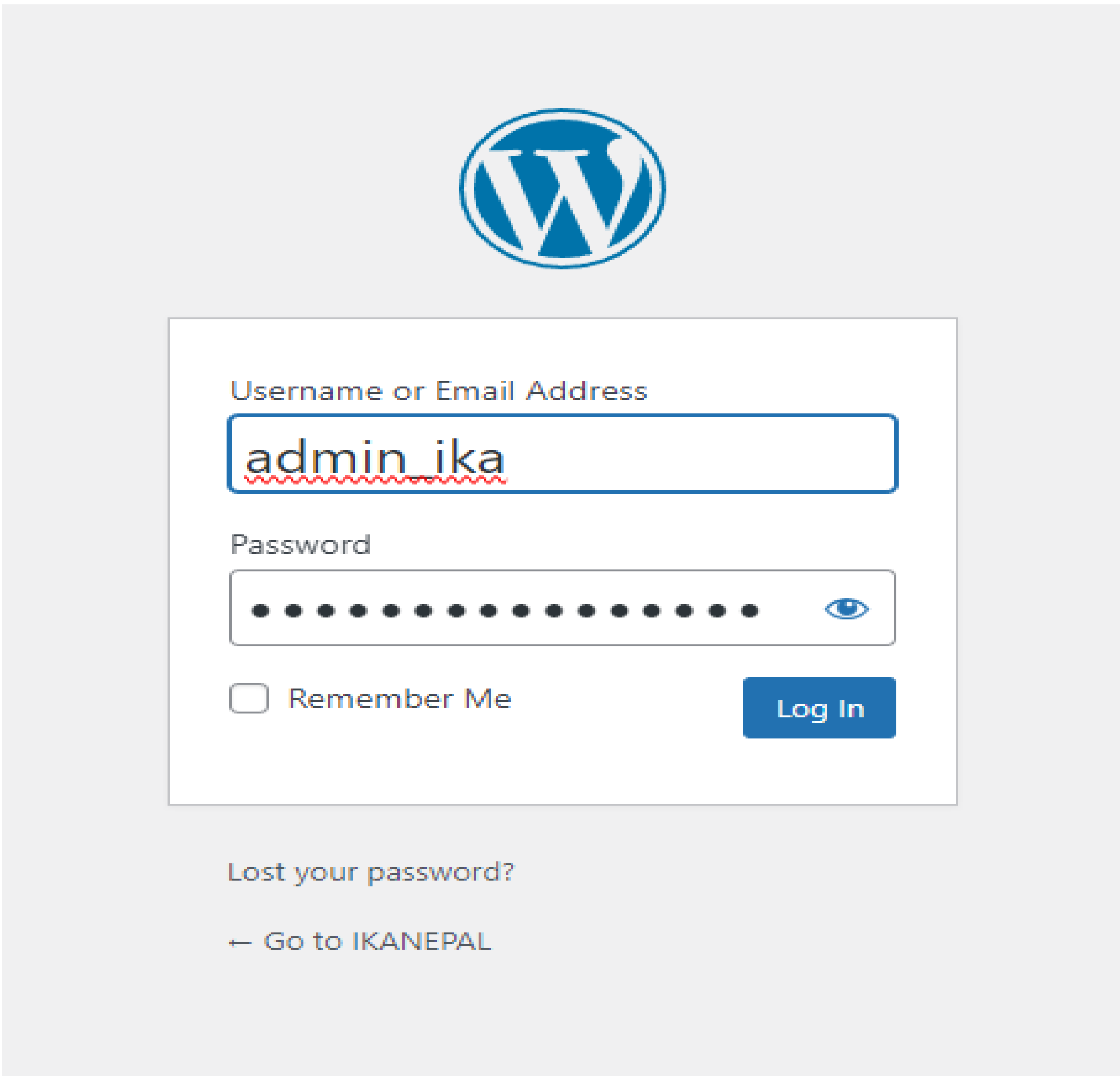
Guidelines: Jetpack CRM

1. Getting Started:

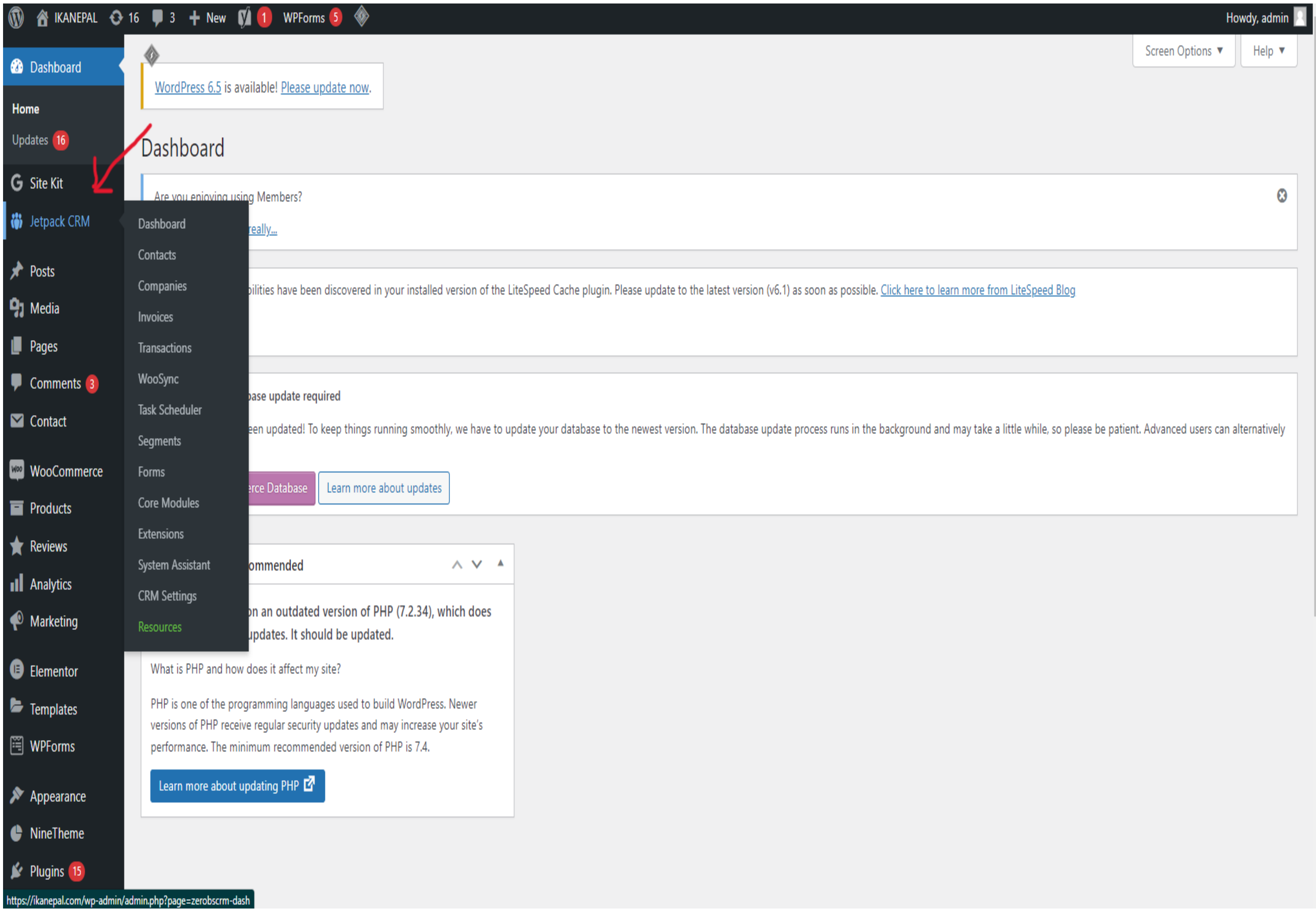
Sign Up/Login: Visit your website with the following link: https://ikanepal.com/wp-admin/ and log in

The below interface will open:



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.

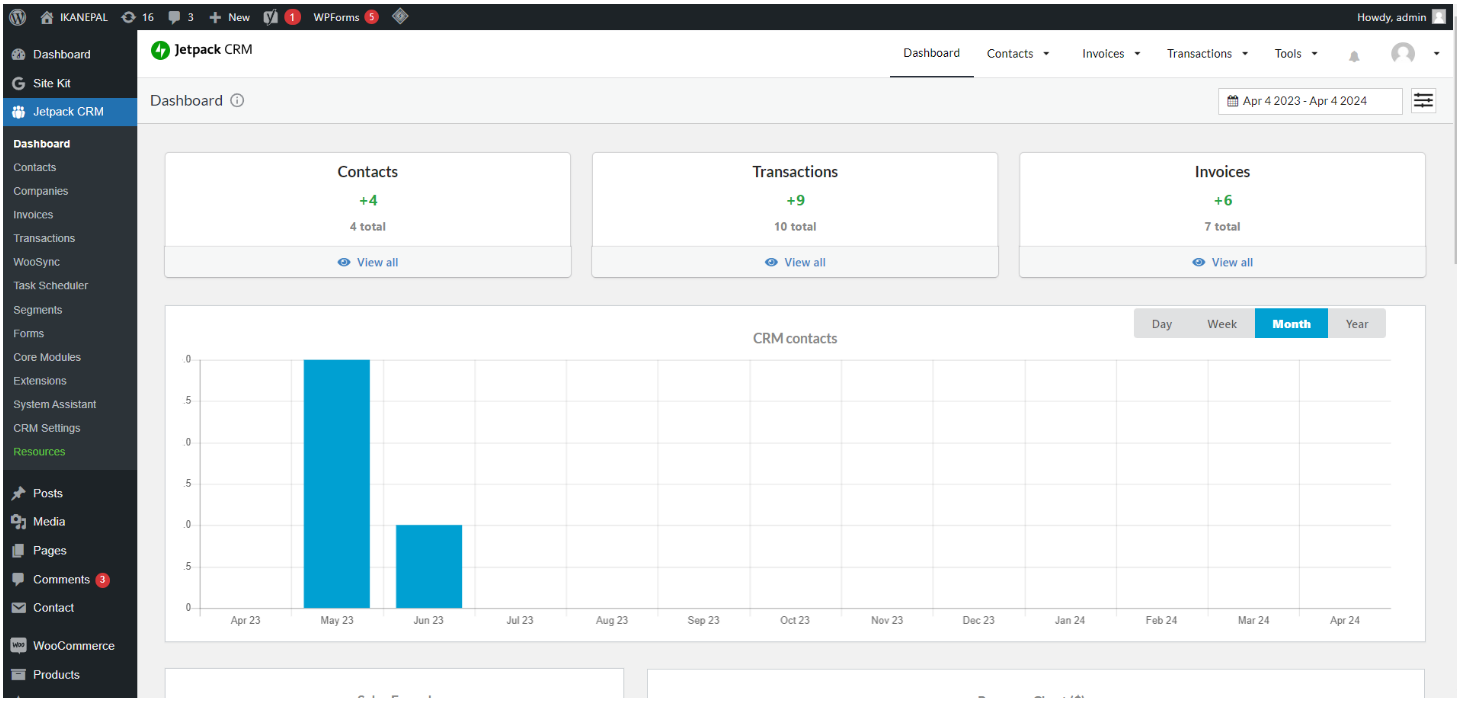
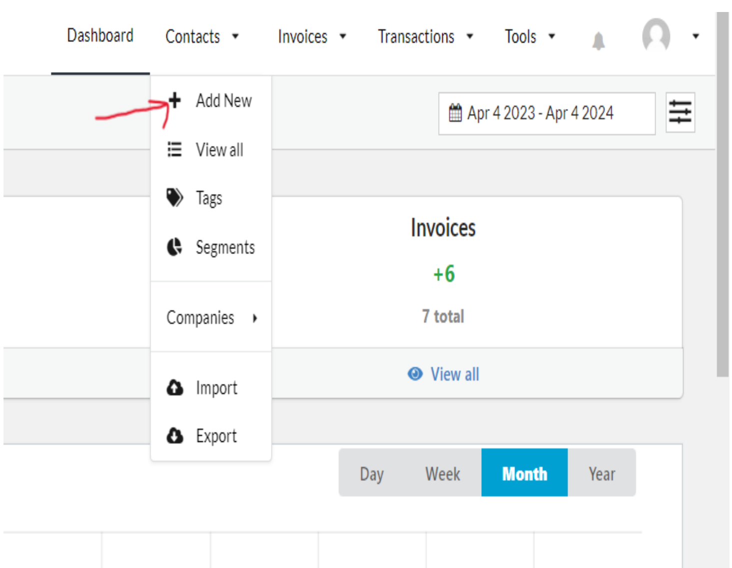


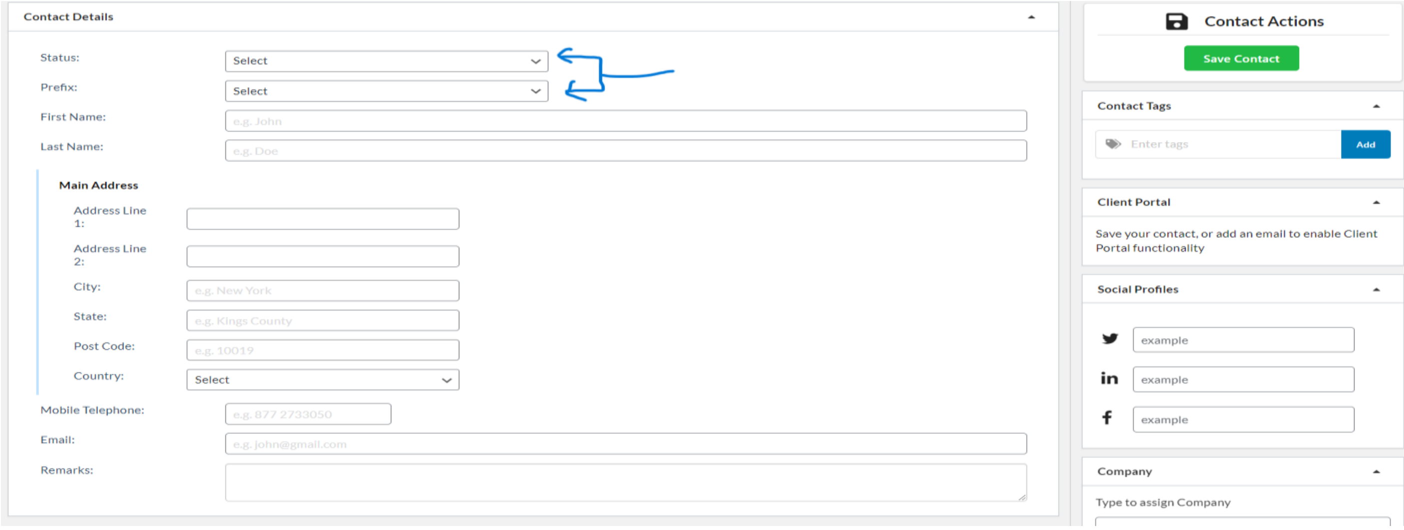
Fig: Dashboard of Jetpack CRM

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:





View/Edit Contacts:

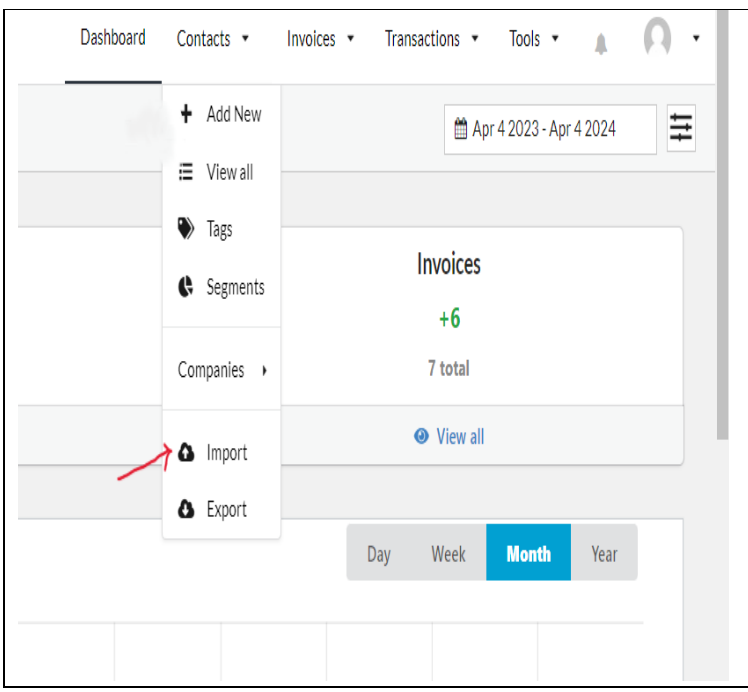
You can view and edit contact details by clicking on the contact's name. You can also add notes, set reminders, and assign tags here.

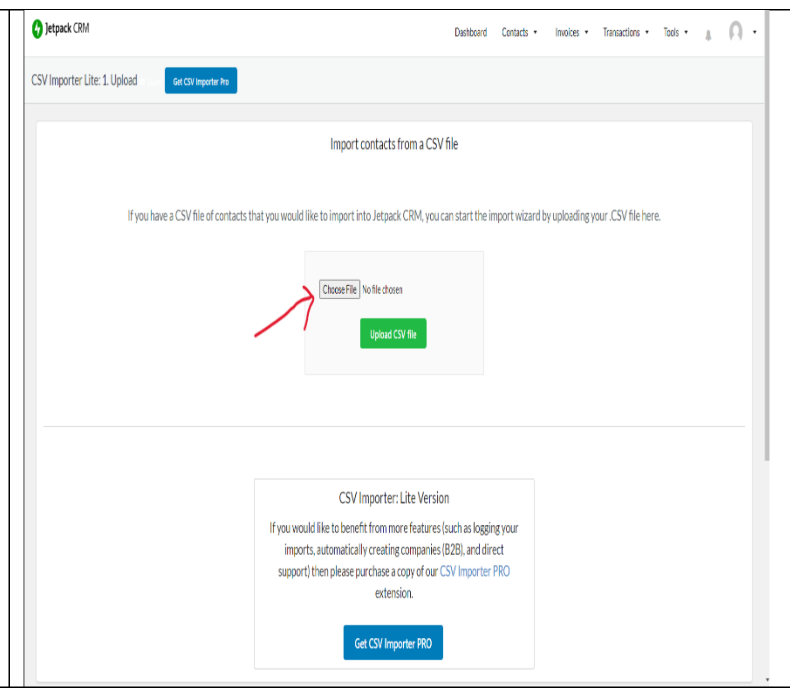
Importing Contact Files:

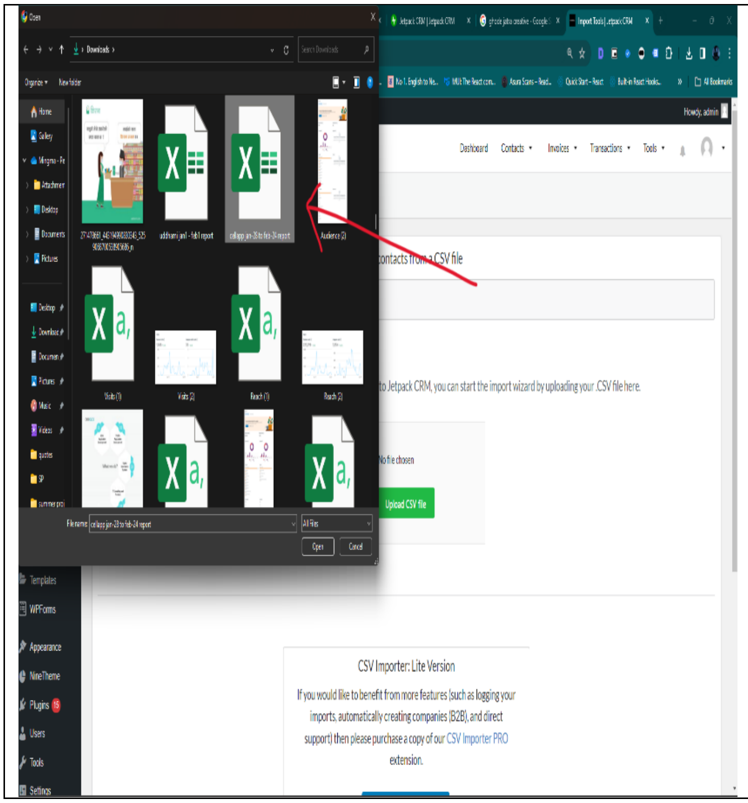
Excel files can be imported to add new contacts.

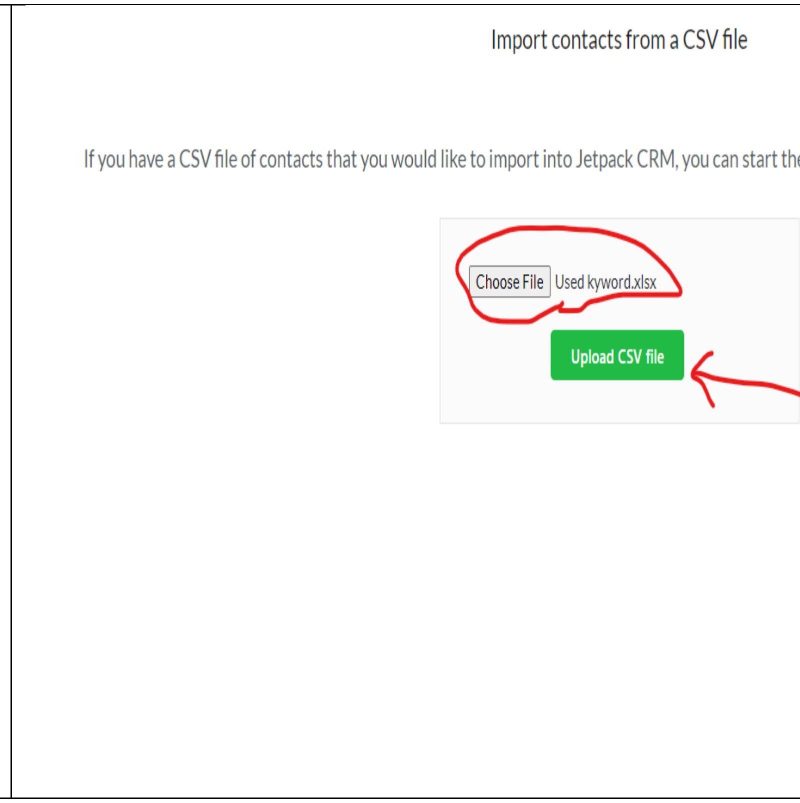
Step 1: Click import

Step 2: Choose a file





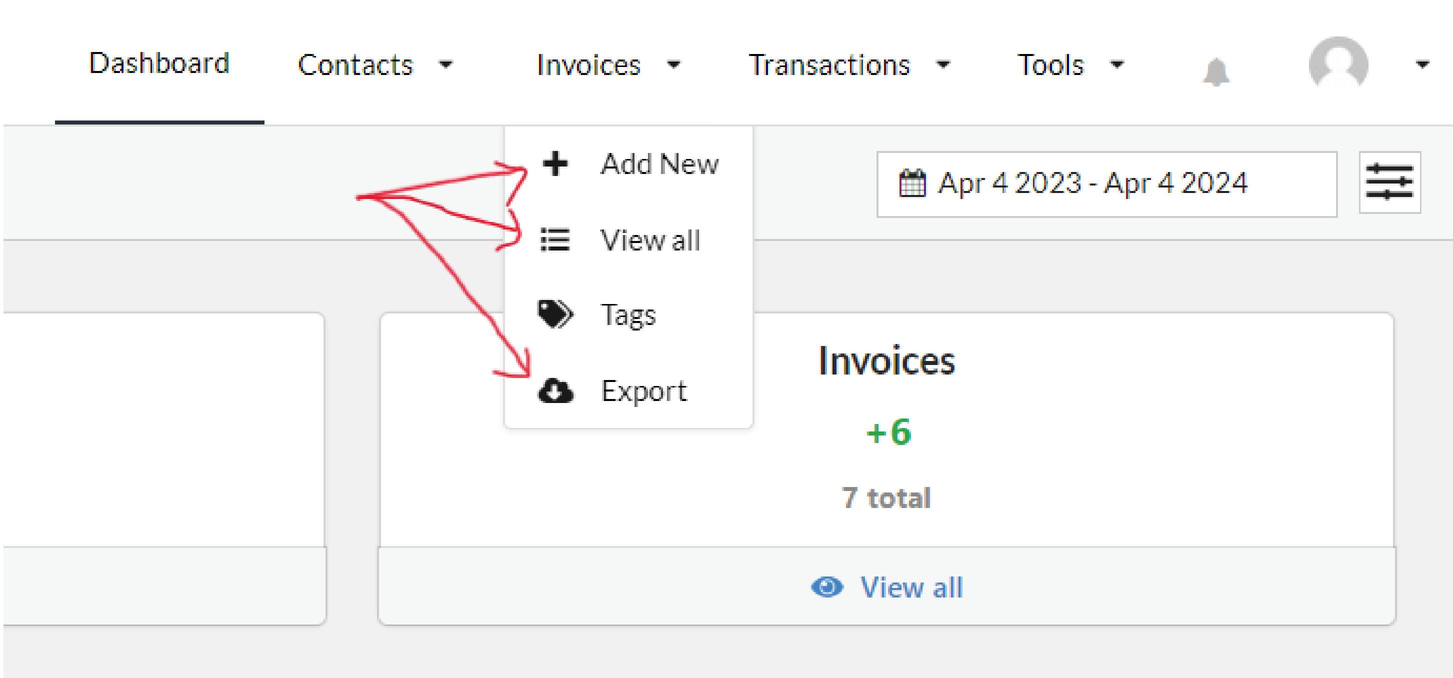


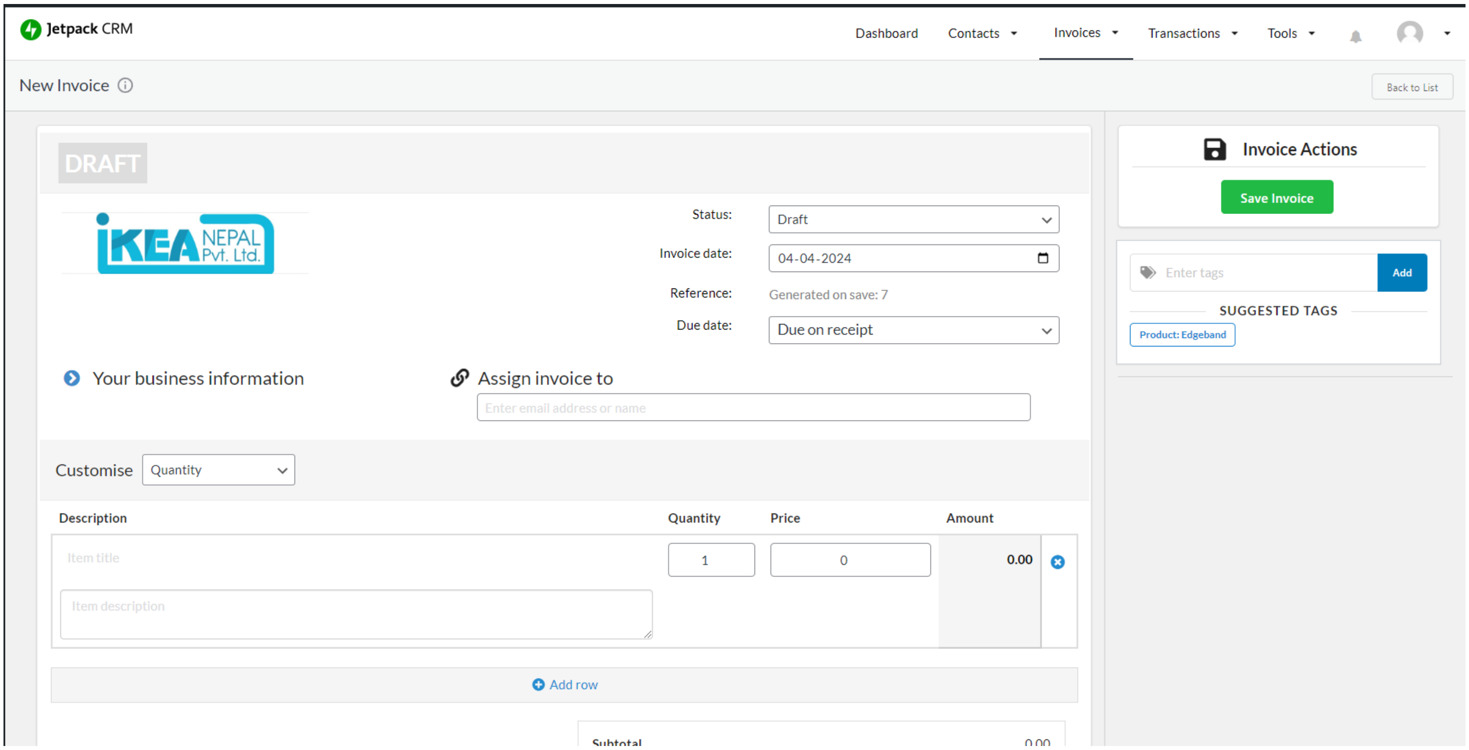


Step 3: Select an Excel file. Step 4: Upload the file

3. Adding Invoices:

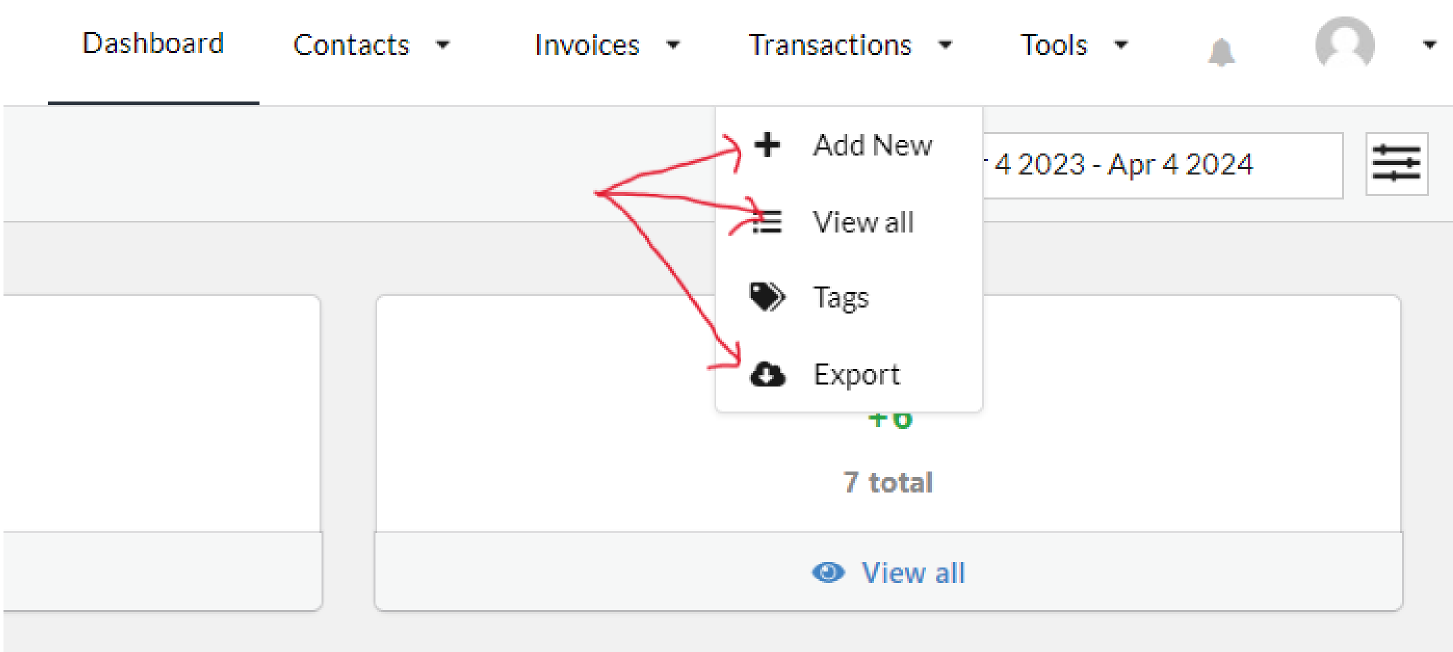
Generate and manage invoices for your deals. Navigate to the "Invoices" tab to create new invoices, send them to clients, and track their payment status. View all and export your data.



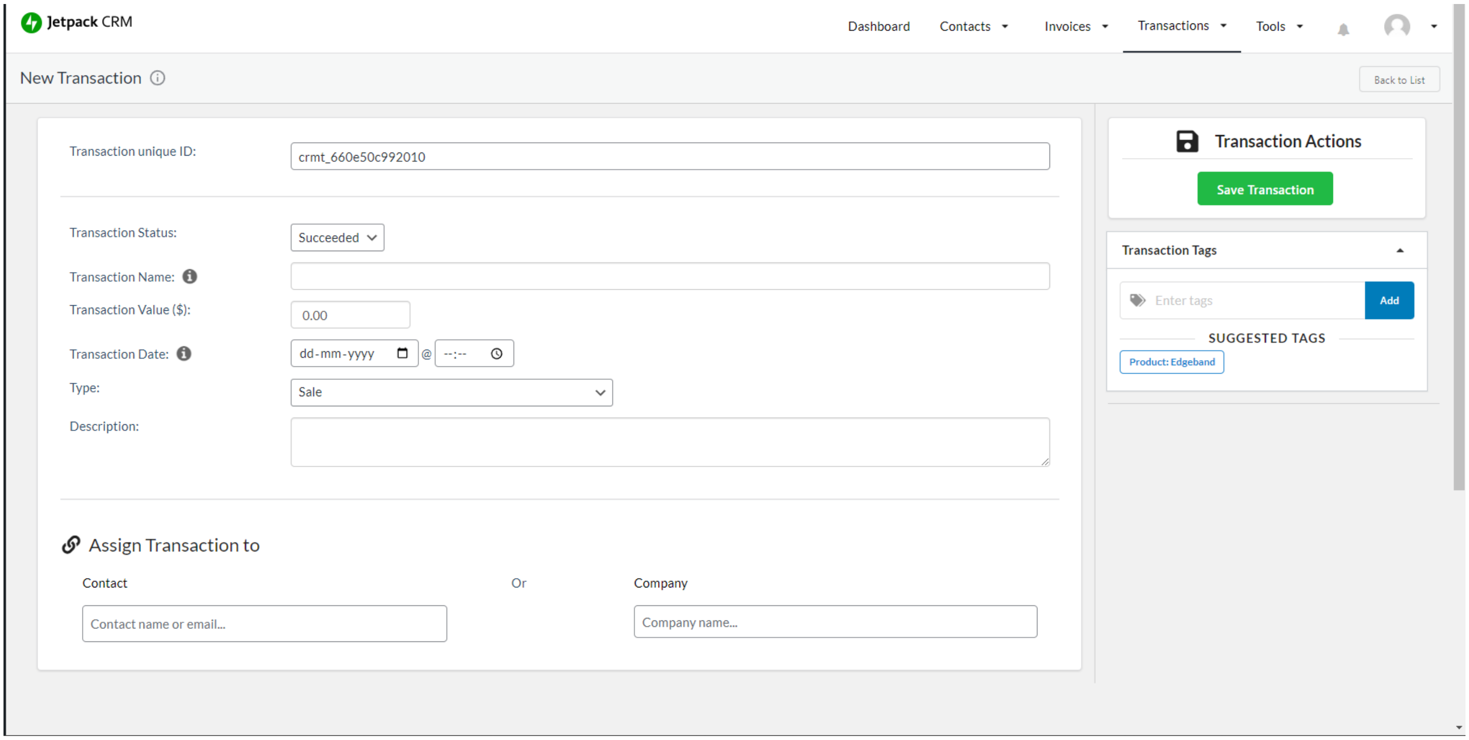


4. Adding Transaction:

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



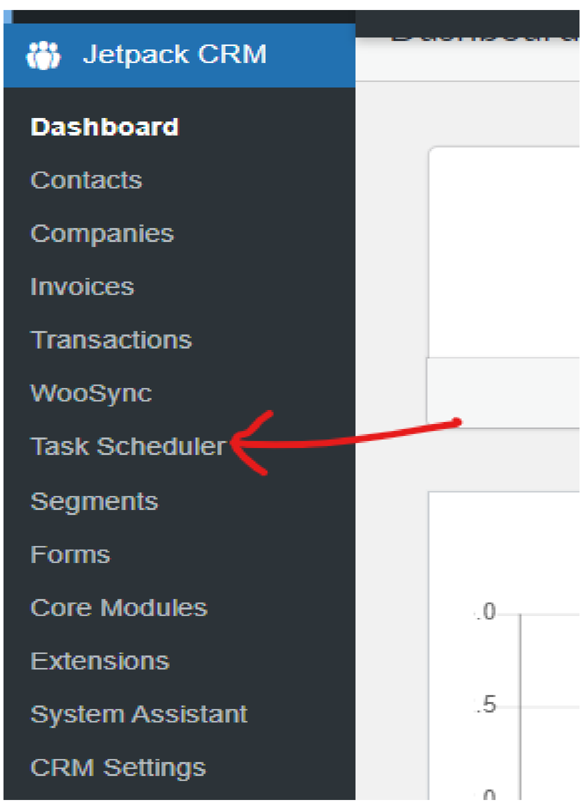
Add New:

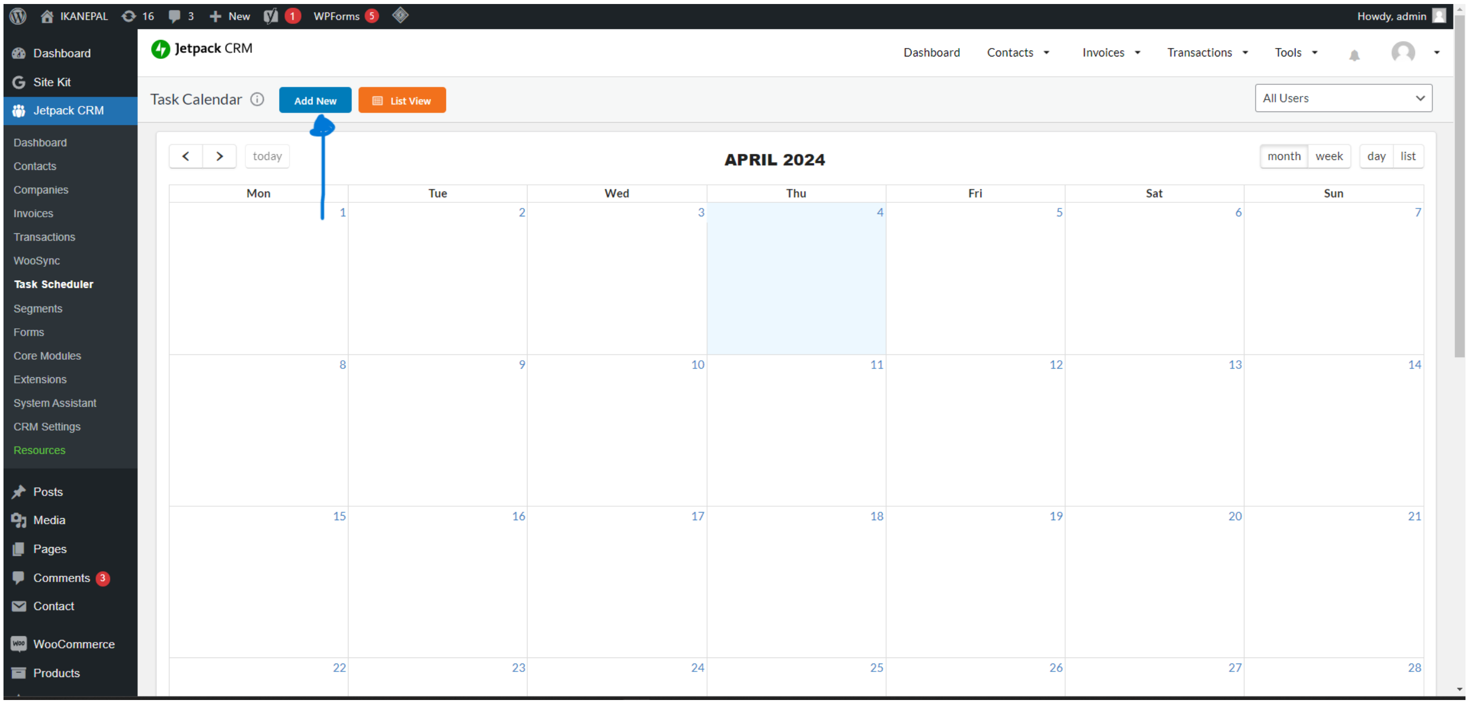


Fill in the required information to add the transactions.

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.