SmallBusinessBuddy - User Documentation

■ What is SmallBusinessBuddy?

SmallBusinessBuddy is a simple CRM system designed specifically for small businesses, associations, clubs, and entrepreneurs in Croatia. The application allows you to easily manage contacts, organize workshops and courses, send invoices, and communicate with members - all in one place.

■ Who is it for?

- **Small entrepreneurs** - client tracking and invoicing
- **Associations and clubs** - membership management and activities
- **Course organizers** - participant registration and communication
- **Sports clubs** - member and parent management
- **Non-profit organizations** - volunteer and donation tracking

■ Key Benefits

- **Works offline** - all functions available without internet
- **Croatian localization** - supports Croatian payment slips and standards
- **Easy to use** - intuitive interface without complexity
- **One-time price** - no monthly subscriptions
- **Import existing data** - easy migration from Excel

■ Main Features

1. Contact Management

You can:
- Add contacts with basic information (name, address, phone, email)
- Mark contacts as members with membership dates
- Search contacts by name, city, or membership status
- Group contacts into custom lists

Useful for:
- Membership records in associations
- Client database for services
- Course participant contacts

2. Underage Participants

You can:
- Register children linked to their parents/guardians
- Track membership and participation in activities

- Automatically direct communication to parents

Useful for:
- Sports clubs with children's sections
- Language schools for children
- Creative workshops for youth

3. Workshops and Courses

You can:
- Create workshops with dates and instructors
- Register participants (adults and minors)
- Track payment status for each workshop
- View an overview of upcoming activities

Useful for:
- Planning cooking classes
- Organizing seminars
- Sports training and competitions

4. Instructors and Teachers

You can:
- Add instructors with contact details
- Assign instructors to specific workshops
- Track which person leads which activities

5. Invoices and Payment Slips

You can:
- Create payment templates for different services (memberships, courses)
- Generate Croatian payment slips with your logo
- Send payment slips by email or print them
- Track what has been paid and what is still due

Useful for:
- Membership fee collection
- Course invoices
- Donations for associations

6. Communication

You can:
- Send newsletters to entire groups at once
- Use ready-made templates for different message types
- Personalize messages with recipient names
- Track who received the message

Useful for:
- Announcing new courses
- Event invitations
- Regular newsletters with updates

7. Custom Lists

You can:
- Create your own contact lists (e.g. "VIP clients", "Active members")
- Organize lists into folders for easier navigation
- Send messages to an entire list at once

8. Statistics and Reports

You see:
- Total number of contacts, members, and workshops
- Financial overview - how much was sent, paid, and due
- Birthday calendar for greetings
- Most popular workshops and most active members

■ Getting Started

1. **Set up your organization** - enter name, IBAN, and contacts
2. **Add a logo** - for a more professional look on payment slips
3. **Import existing contacts** - from Excel file or manually
4. **Create your first payment template** - for memberships or services
5. **Send your first newsletter** - introduce yourself to members

■ Useful Tips

- **Update memberships regularly** - mark when membership expires
- **Use lists** - group contacts by interests or activities
- **Prepare templates** - for frequently sent messages
- **Check birthdays** - a great way to maintain relationships
- **Archive old workshops** - for better clarity

■ FAQ

Can I use the app without internet?
Yes, all functions work offline except sending emails.

Can I import data from Excel?
Yes, the app supports importing CSV files with contacts.

Is my data safe?
Yes, all data is stored locally on your computer.

Can I customize payment slips?
Yes, you can add your logo and adjust the layout.

Is there a contact limit?
The app supports up to 5,000 contacts without performance issues.

■■ Technical Support

For more information or help, check:
- Built-in help system in the app
- Video tutorials on our website
- Contact for technical support

SmallBusinessBuddy - CRM tailored for Croatian small businesses