Ai-SHA CRM
Complete User Guide

Everything you need to know to use the CRM effectively

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This guide will walk you through:

- Getting started and navigating the CRM
- Managing contacts, leads, accounts, and opportunities
- Scheduling and tracking activities
- Using AI-powered features to work smarter
- Running reports and analyzing your pipeline
- Tips and best practices for success

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1. Getting Started

1.1 Logging In

To access Ai-SHA CRM:

1. Open your web browser and navigate to your CRM URL
2. Enter your email address and password
3. Click "Sign In"

TIP: If you forgot your password, click "Forgot Password" and follow the email instructions to reset it.

1.2 Understanding Your Dashboard

After logging in, you will see the Dashboard - your CRM command center.

Dashboard Components:

- Stats Cards (Top): Quick metrics like Total Contacts, New Leads, Active Opportunities, Pipeline Value, and Activities Logged
- Sales Pipeline Chart: Visual representation of your deals by stage
- Lead Sources Chart: Where your leads are coming from
- Top Accounts: Your highest-value clients
- Recent Activities: Latest tasks, calls, and meetings

TIP: You can customize which widgets appear on your dashboard by clicking "Customize Dashboard" in the top-right corner.

1.3 Navigating the CRM

The main navigation menu is on the left side of the screen:

- Dashboard: Overview of your CRM activity
- Contacts: Manage individual people
- Accounts: Manage companies/organizations
- Leads: Track potential customers
- Opportunities: Manage sales deals
- Activities: Tasks, calls, meetings, emails
- Calendar: Schedule and view activities
- Reports: Analytics and insights

TIP: Press Ctrl+K (Cmd+K on Mac) to open the Command Palette for quick navigation and actions.

1.4 Setting Up Your Profile

Complete your profile to personalize your experience:

1. Click your name/avatar in the top-right corner
2. Select "Settings" or "Profile"
3. Add/update your information:
    * Full Name
    * Phone Number (for softphone features)
    * Timezone (for accurate scheduling)
    * Date/Time Format preferences
4. Click "Save Changes"

2. Contact Management

2.1 What Are Contacts?

Contacts represent individual people you interact with - customers, prospects, partners, or vendors. They can be linked to Accounts (companies) and tracked through Activities.

2.2 Creating a New Contact

Step-by-Step:

1. Navigate to "Contacts" in the left sidebar
2. Click the "+ Add Contact" button (top-right)
3. Fill in the contact information:

Required Fields:

- First Name
- Last Name

Optional (but recommended):

- Email: Contact email address
- Phone: Primary phone number
- Mobile: Mobile phone number
- Job Title: Their position
- Department: Which department they work in
- Company: Link to an Account (or create new)
- Status: Active, Inactive, Prospect, or Customer
- Lead Source: How you found them (website, referral, etc.)
- Tags: Custom labels for organization (e.g., "VIP", "Decision Maker")
- Address: Full mailing address
- Notes: Additional context

4. Choose who to assign the contact to (defaults to you)
5. Click "Save Contact"

TIP:	The more information you add now, the easier it will be to find and work with this contact later. Take an extra 30 seconds to fill in details!

2.3 Viewing & Editing Contacts

To view or edit a contact:

1. Go to the Contacts page
2. Click on any contact card to open the detail panel

3. In the detail panel, you can:
   * View all contact information
   * See activity timeline (calls, emails, meetings)
   * Add notes
   * Log new activities
   * Convert to a lead
4. Click the edit (pencil) icon to modify information
5. Make your changes and click "Update Contact"

2.4 Searching & Filtering

Search:

- Use the search bar at the top to find contacts by name, email, phone, or company
- Results update as you type

Filters:

Click the filter buttons to narrow down your list:

- Status: Filter by Active, Inactive, Prospect, Customer, or All
- Tags: Filter by specific tags you have created
- Assigned To: See only contacts assigned to specific users
- Company: View contacts from a specific account

TIP: You can combine multiple filters. For example, filter for "Active" contacts with tag "VIP" assigned to you.

2.5 Bulk Operations

Work with multiple contacts at once:

Bulk Select:

1. Check the boxes next to contacts you want to work with
2. Or use "Select All" to choose all visible contacts
3. Click the bulk action dropdown that appears
4. Choose an action:
   * Add Tags: Apply tags to all selected contacts
   * Remove Tags: Remove tags from selected contacts
   * Assign To: Reassign contacts to another user
   * Change Status: Update status for all selected
   * Delete: Remove selected contacts (careful!)

NOTE: Deleted contacts cannot be recovered. Make sure you really want to delete before confirming!

Import Contacts:

1. Click "Import" button on Contacts page
2. Download the CSV template
3. Fill in your contact data in the template
4. Upload the completed CSV file
5. Map columns to CRM fields
6. Review and confirm import

Export Contacts:

1. Apply any filters you want
2. Click "Export CSV" button
3. Your browser will download a CSV file with all visible contacts

2.6 Converting Contacts to Leads

When a contact shows buying interest, convert them to a lead:

1. Open the contact detail panel
2. Click "Convert to Lead" button
3. Confirm the conversion
4. The contact becomes a lead in your pipeline

TIP: The original contact record is preserved, and a new lead is created with all the same information. You can track the lead through your sales process.

3. Lead Management

3.1 Understanding Leads

Leads are potential customers who have shown interest in your product or service but have not been fully qualified yet. They move through stages as you work with them.

Lead Lifecycle:

- New: Just entered your system, no contact yet
- Contacted: You have reached out (call, email, meeting)
- Qualified: They meet your criteria and are interested
- Unqualified: Not a fit for your business
- Converted: Became a customer (Contact + Account + Opportunity)
- Lost: No longer interested or went with competitor

3.2 Creating Leads

1. Go to "Leads" in the navigation
2. Click "+ Add Lead"
3. Fill in lead information:

Required:

- First Name
- Last Name

Recommended:

- Email
- Phone
- Company
- Job Title
- Lead Source: Where did they come from? (website, referral, cold call, etc.)
- Estimated Value: Potential deal size
- Notes: Context about their needs

4. Set initial status (usually "New")
5. Assign to a team member
6. Click "Save Lead"

TIP: Always capture the lead source! This helps you understand which marketing channels are working best.

3.3 Lead Stages & Workflow

As you work with a lead, update their status to reflect progress:

Typical Workflow:

1. New lead comes in -> Status: "New"
2. You make first contact (call/email) -> Status: "Contacted"
3. Lead meets your criteria and shows interest -> Status: "Qualified"
4. Either:
   * Convert to customer -> Status: "Converted"
   * Not a fit -> Status: "Unqualified"
   * Lost interest -> Status: "Lost"

> **NOTE:** Do not let leads sit in "New" for too long! Best practice: Contact within 24 hours of receiving a lead.

3.4 Lead Scoring

The CRM automatically scores leads from 0-100 based on:
- Completeness of information
- Company size and industry
- Job title (decision-maker vs. influencer)
- Engagement (opens, clicks, replies)
- Lead source quality

Higher scores = more likely to convert. Focus on leads with scores above 70 first!

> **TIP:** You can view score explanation by hovering over the score badge. The AI explains why it assigned that score.

3.5 Converting Leads

When a lead is qualified and ready to become a customer:

1. Open the lead detail panel
2. Click "Convert Lead"
3. Choose what to create:
   * Contact: Always created (the person)
   * Account: If they work at a company
   * Opportunity: If there is a specific deal to track
4. Review pre-filled information

5. Add opportunity details if creating one:
    * Deal name
    * Amount
    * Close date
    * Stage
6. Click "Convert & Create"

The lead record is preserved for historical tracking, and new Contact/Account/Opportunity records are created.

4. Account Management

4.1 What Are Accounts?

Accounts represent companies or organizations. Multiple Contacts can work at the same Account, and Opportunities are tied to Accounts.

Think of it this way:

- Account = The company (e.g., "ACME Corporation")
- Contacts = People who work there (e.g., "John Smith, CEO")
- Opportunities = Deals with that company (e.g., "$50K Website Redesign")

4.2 Creating Accounts

1. Navigate to "Accounts"
2. Click "+ Add Account"
3. Fill in company information:

Required:

- Company Name

Recommended:

- Industry: Select from dropdown
- Website: Company website URL
- Phone: Main company number
- Email: General company email
- Type: Prospect, Customer, Partner, Competitor, or Vendor
- Annual Revenue: Helps with prioritization
- Employee Count: Indicates company size
- Address: Full company address
- Description: Notes about the company

4. Click "Save Account"

4.3 Linking Contacts to Accounts

There are two ways to link contacts to accounts:

Method 1: When Creating a Contact:

1. In the contact form, find the "Company" field
2. Start typing the company name
3. Select from existing accounts, or click "Create New Account"

Method 2: From the Account Page:

1. Open an Account detail panel
2. Click "Link Contact" or "+ Add Contact"
3. Select an existing contact or create a new one

> **TIP:** Always link contacts to accounts! This gives you a complete view of your relationship with each company.

4.4 Account Types

Use account types to categorize relationships:

- Prospect: Companies you are trying to win as customers
- Customer: Active clients who pay you
- Partner: Business partners, resellers, affiliates
- Competitor: Track competitors for market intelligence
- Vendor: Suppliers and service providers

You can filter accounts by type to focus on specific relationships.

5. Sales Pipeline & Opportunities

5.1 Creating Opportunities

Opportunities represent specific deals with a dollar value and close date.

1. Go to "Opportunities"
2. Click "+ Add Opportunity"
3. Fill in deal information:

Required:

- Opportunity Name: Descriptive title (e.g., "ACME Corp - Website Redesign")
- Amount: Expected revenue in USD
- Close Date: When you expect to close

Recommended:

- Account: Which company is this deal with?
- Contact: Primary decision-maker
- Stage: Where in the sales process? (Prospecting, Qualification, etc.)
- Probability: Likelihood of winning (0-100%)
- Lead Source: How did this opportunity originate?
- Type: New Business, Existing Business, or Renewal
- Description: Details about the deal
- Next Step: What needs to happen next?

4. Assign to a team member
5. Click "Save Opportunity"

5.2 Pipeline Stages

Opportunities move through these stages:

1. Prospecting: Initial contact and discovery
   * What to do: Understand their needs, establish rapport
   * Exit criteria: They agree to a deeper conversation

2. Qualification: Confirming fit and budget
   * What to do: Verify they have budget, authority, need, and timeline (BANT)
   * Exit criteria: They meet your qualification criteria

3. Proposal: Presenting your solution
   * What to do: Send proposal, demo product, present pricing
   * Exit criteria: They review your proposal

4. Negotiation: Discussing terms
   * What to do: Handle objections, negotiate pricing, finalize terms
   * Exit criteria: Agreement on terms

5. Closed Won: You won the deal!
   * Record: Final contract value and close date
   * Next steps: Onboard the customer

6. Closed Lost: Deal did not happen
   * Record: Why you lost (pricing, timing, competitor, etc.)
   * Consider: Can you follow up later?

5.3 Using the Kanban Board

The Kanban board provides a visual way to manage your pipeline:

1. Go to Opportunities page
2. Click the "Board View" icon (top-right)
3. You will see columns for each stage
4. Drag and drop opportunity cards between stages
5. Click any card to view/edit details

> **TIP:** The board view is great for pipeline reviews and team meetings. Switch back to list view for detailed analysis.

5.4 Forecasting

Use the Reports section to forecast revenue:

- Pipeline Value: Sum of all open opportunities
- Weighted Pipeline: Sum of (Amount x Probability %) for each deal
- Expected Close This Month/Quarter: Opportunities with close dates in that period

Update close dates and probabilities regularly to keep forecasts accurate.

6. Activities & Task Management

6.1 Activity Types

Activities track your interactions and to-dos:

- Call: Phone conversations
- Email: Email communications
- Meeting: In-person or virtual meetings
- Task: To-do items and action items
- Note: General observations or reminders
- Demo: Product demonstrations
- Proposal: Sending proposals or quotes

6.2 Creating Activities

1. Navigate to "Activities"
2. Click "+ Add Activity"
3. Choose activity type
4. Fill in details:

- Subject: Brief title (e.g., "Follow-up call with John")
- Description: Full details about the activity
- Due Date: When it needs to be done
- Due Time: Specific time (optional)
- Duration: How long it will take (in minutes)
- Priority: Low, Normal, High, or Urgent
- Status: Scheduled, In Progress, Completed, or Cancelled
- Related To: Link to Contact, Lead, Account, or Opportunity
- Location: For meetings (physical address or video link)

5. Click "Save Activity"

TIP:	Always link activities to the relevant contact, lead, account, or opportunity. This creates a complete history of your interactions.

6.3 Calendar View

View your activities in calendar format:

1. Go to "Calendar" in the navigation
2. Choose your view:
    * Month: See the whole month at a glance
    * Week: Detailed weekly schedule

* Day: Hour-by-hour daily view

3. Click any time slot to create a new activity
4. Click existing activities to view or edit
5. Drag activities to reschedule them

Calendar view makes it easy to see your schedule and avoid double-booking.

6.4 Task Management

Best practices for managing tasks:

- Set realistic due dates: Do not overcommit
- Use priorities: Mark truly urgent items as High or Urgent
- Break down large tasks: Create multiple smaller tasks
- Update status: Move tasks from Scheduled -> In Progress -> Completed
- Review daily: Check your task list every morning

TIP:	Use the "Overdue" filter to see tasks you have missed. Try to clear overdue tasks before taking on new ones.

7. Reports & Analytics

7.1 Dashboard Metrics

Your dashboard shows key performance indicators:

- Total Contacts: All contacts in your CRM
- New Leads (30d): Leads created in last 30 days
- Active Opportunities: Open deals in pipeline
- Pipeline Value: Total dollar value of active opportunities
- Activities Logged (30d): Tasks/calls/meetings completed recently

These metrics update in real-time as you work in the CRM.

7.2 Sales Reports

Access detailed sales analytics:

1. Go to "Reports" in navigation
2. Select "Sales Analytics"
3. View metrics:

- Revenue Trends: Track revenue over time
- Win Rate: Percentage of opportunities won
- Average Deal Size: Mean opportunity value
- Sales Cycle Length: Average days to close
- Pipeline Coverage: Pipeline value vs. quota
- Top Performers: Which reps are closing the most deals

4. Use date filters to analyze specific time periods
5. Export to CSV or PDF for presentations

7.3 Lead Analytics

Understand your lead generation and conversion:

- Lead Source Performance: Which channels bring the best leads?
- Conversion Rate: Percentage of leads that become customers
- Lead Response Time: How quickly you contact new leads
- Lead Age Report: Identify leads needing immediate follow-up

TIP: Focus on the lead sources with the highest conversion rates. Double down on what works!

7.4 Exporting Data

Export data for external analysis:

CSV Export:

- Go to any list page (Contacts, Leads, etc.)
- Apply filters if you want a subset
- Click "Export CSV"
- Open in Excel, Google Sheets, or other tools

Report Export:

- Open any report
- Click "Export" button
- Choose CSV (data) or PDF (visual report)

NOTE: Exported data may contain sensitive information. Handle CSV files securely and delete after use.

8. AI Features

8.1 AI Assistant

The AI Assistant (avatar in bottom-right) helps you work faster:

What It Can Do:

- Answer questions about your CRM data
- Create summaries of contacts, leads, or opportunities
- Research companies or contacts using web search
- Draft emails to prospects
- Navigate the CRM with voice commands
- Suggest next best actions

How to Use:

1. Click the AI avatar in the bottom-right corner
2. Type or speak your request
3. Wait for the AI response
4. If it creates something (email, summary), review and edit before using

Example Requests:

- "Summarize my top 5 opportunities"
- "Draft a follow-up email to John Smith"
- "Show me leads that need follow-up"
- "Research ACME Corporation"
- "Create a contact for Jane Doe at TechCorp"

8.2 AI Email Composer

Generate professional emails quickly:

1. When creating an Activity of type "Email"
2. Click "Generate with AI" button
3. Describe what you want the email to say
4. AI drafts the email for you
5. Review and edit the draft
6. Send or save the email

> **TIP:** Give the AI context! Mention the recipient name, company, and what you want to achieve. Better input = better output.

8.3 Document Processing

AI can extract data from documents automatically:

Business Cards:

1. Navigate to Document Processing
2. Click "Business Card Scanner"
3. Upload a photo of the business card
4. AI extracts name, email, phone, company, title
5. Review and create the contact

Receipts & Invoices:

1. Go to Cash Flow (if enabled)
2. Upload receipt image or PDF
3. AI extracts vendor, amount, date, items
4. Review and save the transaction

NOTE: AI is 90-95% accurate but not perfect. Always review extracted data before saving to catch any errors.

9. Tips & Best Practices

Contact Management Tips

- Always fill in as much info as possible - rich data = better insights
- Use tags consistently (e.g., "VIP", "Decision Maker", "Technical")
- Link contacts to accounts immediately
- Add notes after every interaction to maintain context
- Update contact status as relationships evolve

Lead Management Tips

- Contact new leads within 24 hours (faster = better conversion)
- Track lead source religiously - it shows what marketing works
- Use the Lead Age Report to find leads that need attention
- Do not let leads sit - move them through stages or mark as lost
- Convert qualified leads promptly to keep pipeline accurate

Opportunity Management Tips

- Be realistic with close dates - accuracy matters for forecasting
- Update probability as deals progress (or stall)
- Always link opportunities to accounts and contacts
- Use the Next Step field to track what needs to happen
- Review your pipeline weekly to keep it clean and current

Activity & Task Tips

- Log activities immediately after completing them
- Always link activities to relevant records (contact, lead, etc.)
- Set reminders for follow-ups so nothing falls through the cracks
- Use priorities wisely - not everything can be urgent
- Complete or cancel old tasks to keep your list manageable

General CRM Best Practices

- Make the CRM your single source of truth - log everything here
- Update records in real-time, not at the end of the day
- Use the search and filters to work efficiently
- Review your data quality monthly - clean up duplicates and outdated info
- Leverage AI features to save time on repetitive tasks
- Export reports regularly for analysis and presentations

10. Troubleshooting & FAQs

Common Issues

Q: I cannot see all the contacts/leads in the system

A: This depends on your role:

- If you are an Employee: You only see records you created or that are assigned to you
- If you are a Manager: You should see all records in your organization
- Check with your administrator if you think you should have broader access

Q: My data is not saving

A: Try these steps:

1. Check your internet connection
2. Make sure all required fields (marked with *) are filled in
3. Try refreshing the page and saving again
4. If the problem persists, contact your administrator

Q: How do I delete a record?

A: To delete:

1. Open the record detail panel
2. Click the delete (trash) icon
3. Confirm deletion

> **NOTE:** Deleted records cannot be recovered. Make sure you really want to delete!

Q: Can I undo an action?

A: Unfortunately, there is no undo button. However:

- You can restore deleted records from a backup (ask your admin)
- You can edit records to fix mistakes
- The system keeps an audit log of all changes

Q: How do I change my password?

1. Click your name/avatar in top-right
2. Select "Settings" or "Profile"
3. Look for "Change Password"
4. Enter your current password and new password
5. Click "Update Password"

Q: The AI is not responding

A: Check these:

- Make sure you are connected to the internet
- Try refreshing the page
- The AI may be temporarily unavailable - try again in a few minutes
- Contact your administrator if it is consistently not working

Q: How do I report a bug or request a feature?

A: Contact your system administrator. They can:

- Help troubleshoot the issue
- Submit bug reports to the development team
- Request new features on your behalf

Getting Help

If you need assistance:

1. Check this User Guide first
2. Ask your team lead or manager
3. Contact your system administrator
4. Join training sessions if offered

Remember:

- The more you use the CRM, the easier it gets
- Do not be afraid to experiment - you cannot break it!
- Your CRM data is only as good as what you put in
- Consistency is key - make it a daily habit