Aisha CRM - Comprehensive User Guide

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Welcome to your complete guide to Aisha CRM. This document provides in-depth information to help you manage your customer relationships effectively, from basic setup to advanced AI-powered features.

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Part 1: The Fundamentals

Chapter 1: Introduction to Aisha CRM

Aisha CRM is a powerful platform designed to help you build and maintain strong customer relationships. It centralizes your data, automates tasks, and provides AI-driven insights to make your work more efficient and effective.

What is a CRM?

A Customer Relationship Management (CRM) system is a tool that helps businesses organize and manage their interactions with current and potential customers. It streamlines processes, improves profitability, and helps you stay connected to your customer base.

Core Concepts in Aisha CRM

- **Contacts**: Individuals you have a relationship with.
- **Accounts**: Companies or organizations that your contacts belong to.
- **Leads**: Potential customers who have shown interest but are not yet qualified.
- **Opportunities**: Potential sales deals you are tracking.
- **Activities**: Tasks, meetings, calls, and notes that document your interactions.

Key Benefits of Using Aisha CRM

- **Centralized Data**: All your customer information in one place.
- **Improved Efficiency**: Automate repetitive tasks and streamline workflows.
- **Data-Driven Decisions**: Use reports and analytics to understand your performance.
- **Enhanced Collaboration**: Share information and work together with your team.
- **AI-Powered Insights**: Leverage artificial intelligence to work smarter.

Chapter 2: Getting Started

This chapter guides you through your first login and familiarizes you with the user interface.

First Login and Profile Setup

1. **Sign In**: Open Aisha CRM in your web browser and sign in with the email and password provided by your administrator.
2. **Access Profile**: Click your avatar in the top-right corner and select "Profile Settings".
3. **Update Your Information**:
    - Upload a professional photo.
    - Verify your full name, job title, and phone number.
    - Set your **Timezone**. This is critical for ensuring your meetings and task due dates are accurate.
    - Choose your preferred date and time format.
4. **Save Changes**.

Navigating the User Interface

Aisha CRM's interface is designed for intuitive navigation.

- **Left Navigation Bar**: This is your primary way to access different modules like Dashboard, Contacts, Accounts, Leads, Opportunities, and Reports.
- **Top Header Bar**:
    - **Global Search**: Quickly find any record in the system.
    - **Quick Create Button (+)**: Add a new contact, account, task, or other record from anywhere in the app.
    - **Notifications Bell**: See alerts for mentions, assigned tasks, and system updates.
    - **Profile Menu**: Access your profile, settings, and the logout button.
- **Main Content Area**: This is where the primary information for the selected module is displayed, such as a list of contacts or the details of an opportunity.

Chapter 3: The Dashboard: Your Command Center

The Dashboard is the first screen you see after logging in. It provides a high-level overview of your most important metrics and upcoming activities.

Understanding Dashboard Widgets

Your dashboard is composed of several "widgets," each serving a specific purpose.

- **Key Performance Indicators (KPIs)**: At-a-glance numbers for your total contacts, open opportunities, conversion rates, and pipeline value.
- **Upcoming Tasks**: A list of your tasks and activities that are due today or are overdue. This is your daily to-do list.
- **Pipeline by Stage**: A bar or funnel chart showing the value and volume of opportunities in each stage of your sales pipeline.
- **Recent Activity Feed**: A real-time stream of activities logged by you and your team.
- **Lead Source Performance**: A chart showing which sources are generating the most valuable leads.

Customizing Your Dashboard

Make the dashboard work for you.

1. Click the **"Customize Dashboard"** or gear icon.
2. **Rearrange Widgets**: Drag and drop widgets to place the most important information at the top.
3. **Add/Remove Widgets**: Select which widgets you want to see on your dashboard.
4. **Filter Data**: Many widgets allow you to filter the data, for example, by a specific time period (e.g., "This Quarter") or by team members.

A Recommended Daily Workflow

1. **Morning Review (5 minutes)**: Start your day by reviewing the **Upcoming Tasks** widget. Identify your top priorities and check the **Recent Activity Feed** for any important updates from your team.
2. **Throughout the Day**: As you complete calls, send emails, and attend meetings, log them as activities in Aisha CRM.
3. **End-of-Day Wrap-up (10 minutes)**: Review your dashboard again. Mark completed tasks, update opportunity stages, and schedule follow-up activities for the next day.

Part 2: Core CRM Modules

Chapter 4: Mastering Contact Management

Contacts are the heart of your CRM. This chapter covers how to manage them effectively.

Creating a New Contact

1. Click the **Quick Create (+)** button and select "New Contact," or navigate to the **Contacts** module and click **"+ Add Contact"**.
2. Fill in the essential details:
    - **First Name & Last Name** (Required)
    - **Email** & **Phone Number**
    - **Account Name**: Link the contact to their company. If the account doesn't exist, you can often create it directly from this screen.
    - **Job Title**: Helps you understand their role.
3. Add **Tags** to categorize the contact (e.g., "Decision Maker," "Influencer," "VIP").
4. Click **Save**.

Importing Contacts in Bulk

Use the CSV import for adding a large number of contacts at once.

1. Navigate to **Contacts → Import**.
2. **Download the CSV Template**. This ensures your columns match Aisha's fields.
3. **Prepare Your File**:
    - Do not change the column headers in the template.
    - Ensure data is clean (e.g., consistent phone number formats).
    - Save the file as a CSV.
4. **Upload the File** and map your columns to the corresponding fields in Aisha CRM.
5. **Preview and Validate**: The system will show a preview and flag potential errors or duplicates.
6. **Start Import**. You can monitor the progress and will be notified upon completion.

The Contact Detail Page

This page gives you a 360-degree view of a contact.

- **Details Panel**: Shows all the field information for the contact.
- **Timeline/Activity Feed**: A chronological history of every interaction, including calls, emails, notes, and meetings.
- **Related Lists**: Tabs or sections showing related records, such as their Account, Opportunities they are involved in, and support cases.

Finding and Filtering Contacts

- **Global Search**: Use the search bar at the top for a quick lookup.
- **List View Filters**: In the Contacts module, use the filter panel to create specific lists. For example:
    - "All contacts in California with the tag 'VIP'"
    - "All contacts I haven't spoken to in the last 90 days"

- **Saved Views**: If you frequently use a set of filters, save it as a custom view for one-click access in the future.

Chapter 5: Effective Account Management

Accounts represent the companies or organizations you do business with. Proper account management provides a complete picture of your relationship with a client.

Accounts vs. Contacts

- An **Account** is the company (e.g., "Acme Corporation").
- A **Contact** is a person who works at that company (e.g., "John Smith," an employee at Acme Corporation).
- A single Account can have multiple Contacts linked to it.

Creating an Account

1. Navigate to the **Accounts** module and click **"+ Add Account"**.
2. Enter the **Account Name** (Required).
3. Fill in other key information:
    - **Website**
    - **Industry**
    - **Main Phone Number**
    - **Billing & Shipping Addresses**
4. Assign an **Account Owner** (the person primarily responsible for the relationship).
5. Use **Tags** or a **Type** field to categorize the account (e.g., "Customer," "Prospect," "Partner").
6. Click **Save**.

The Account Hierarchy

For large enterprises, you can create parent-child relationships between accounts.

- **Parent Account**: The main headquarters (e.g., "Global Tech Inc.").
- **Child Accounts**: Regional offices or subsidiaries (e.g., "Global Tech - North America"). This allows you to see a rolled-up view of all activities and opportunities across the entire organization.

Best Practices for Account Management

- **Avoid Duplicates**: Before creating a new account, use the search function to ensure it doesn't already exist.
- **Keep Data Current**: Regularly update account information, such as addresses or changes in company size.
- **Log All Interactions**: Even if you speak with one contact, log the activity at the Account level if it pertains to the company as a whole.
- **Define Account Health**: Use a custom field or notes to track if an account is "Healthy," "At Risk," or "Needs Attention."

Chapter 6: Lead Management Workflow

Leads are the starting point of your sales process. They are individuals or companies who have expressed interest but have not yet been qualified as a viable opportunity.

The Lead Lifecycle

1. **Capture**: A new lead is created in the system.
2. **Qualify**: You research the lead and make initial contact to determine if they are a good fit.
3. **Convert**: If qualified, the lead is converted into a Contact, Account, and (optionally) an Opportunity.
4. **Nurture**: If not ready, the lead is nurtured with marketing campaigns until they are sales-ready.

Creating and Importing Leads

The process is similar to creating contacts. You can create leads one by one or import them in bulk via a CSV file.

- **Crucial Field**: Always capture the **Lead Source** (e.g., "Website," "Trade Show," "Referral"). This is vital for reporting on marketing ROI.

Lead Scoring

Aisha CRM can automatically score leads based on predefined criteria to help you prioritize. Scores are typically based on:

- **Demographics**: Job title, industry, company size.
- **Engagement**: Website visits, email opens, content downloads. A higher score indicates a "hotter" lead that you should contact first.

The Conversion Process

This is a key step. When you convert a lead:

1. Click the **"Convert"** button on the lead record.
2. Aisha CRM will automatically create:
    - A **Contact** record.
    - An **Account** record (if it doesn't already exist).
3. You will be prompted to (optionally) create an **Opportunity** record. This is where you will track the potential deal.
4. **All activities and notes from the lead record are automatically transferred** to the new Contact, Account, and Opportunity records, ensuring no history is lost.

Chapter 7: Opportunity Pipeline Management

Opportunities (or "Deals") are the core of your sales pipeline. Managing them effectively is crucial for forecasting and hitting your revenue targets.

Understanding Pipeline Stages

Your pipeline is a series of stages that an opportunity moves through from creation to close. A typical set of stages might be:

1. **Prospecting**: Initial discovery and research.
2. **Qualification**: Confirmed that the prospect has a need, budget, and authority to buy.
3. **Proposal/Quote**: You have sent a formal proposal.
4. **Negotiation**: You are discussing terms and pricing.
5. **Closed Won**: The deal is signed!
6. **Closed Lost**: The deal did not go through.

Creating an Opportunity

1. Navigate to **Opportunities** and click **"+ Add Opportunity"**.
2. Fill in the key details:
    - **Opportunity Name**: Be descriptive (e.g., "Q4 Website Redesign - Acme Corp").
    - **Account & Primary Contact**: Link the deal to the relevant company and person.
    - **Amount**: The estimated value of the deal.
    - **Expected Close Date**: When you anticipate the deal will close. This is critical for forecasting.
    - **Stage**: The current stage of the opportunity.
3. **Document Next Steps**: Always define the next action required to move the deal forward.
4. Click **Save**.

Managing Your Pipeline: List View vs. Kanban View

Aisha CRM offers two ways to view your opportunities:

- **List View**: A traditional spreadsheet-like view. It's useful for sorting and filtering a large number of deals (e.g., "Show me all deals over $10,000 closing this quarter").
- **Kanban View**: A visual, card-based view where each column represents a stage. You can **drag and drop** opportunities from one stage to the next. This is great for daily pipeline management and team meetings.

Forecasting

Your sales forecast is typically calculated as: `Forecast = Sum of (Amount × Probability %)` for all open opportunities.

- Each stage in your pipeline is associated with a probability of closing (e.g., Qualification = 25%, Negotiation = 75%).
- **To ensure an accurate forecast, you must keep your opportunity stages and amounts up to date.**

Best Practices for Pipeline Hygiene

- **Update Weekly**: Review every open opportunity in your pipeline at least once a week.
- **Stale Deals**: If a deal has had no activity for a long time, either re-engage the prospect or move it to Closed Lost.
- **Document Everything**: Use notes and activities to document why a deal is won, lost, or stalled.

Part 3: AI-Powered Features

Chapter 8: Unleashing the AI Assistant

Aisha's AI Assistant is like having a personal data analyst available 24/7. Use it to save time and get quick answers without navigating through multiple screens.

How to Access the AI Assistant

- Click the **AI Assistant icon** (often a robot or sparkle icon) in the application header.
- Use the keyboard shortcut (e.g., `Ctrl/⌘ + K`).

What You Can Ask: The Art of the Possible

You can ask questions, give commands, and request summaries.

1. Finding Information (Search)

- "Show me all contacts at Acme Corporation."
- "Find opportunities closing this month worth more than $5,000."
- "List my overdue tasks."

2. Creating Records (Commands)

- "Create a follow-up task for the 'Global Tech' opportunity for tomorrow."
- "Add a note to John Smith's contact record about our lunch meeting."
- "Schedule a call with Jane Doe for Friday at 3 PM."

3. Updating Records (Commands)

- "Change the stage of the 'Project Phoenix' opportunity to 'Negotiation'."
- "Update Jane Doe's email to jane.doe@newemail.com."
- "Mark my task 'Send proposal' as complete."

4. Analyzing Data (Summaries & Insights)

- "Summarize my team's activity this week."
- "What's my total pipeline value?"
- "How many leads did we get from the website last month?"

Tips for Getting the Best Results

- **Be Specific**: "Show contacts in California" is better than "Show me my West Coast contacts."
- **Use Full Names**: Refer to "John Smith" instead of "John."
- **Speak Naturally**: You don't need to use rigid commands. "Tell me about my top deals" works just as well as "List opportunities sorted by amount descending."
- **Trust but Verify**: For critical actions like updating data, the AI will ask for confirmation. Always review the change before accepting.

Chapter 9: Scaling Outreach with AI Campaigns

AI Campaigns allow you to automate and personalize your outreach to a large audience, whether through email or phone calls.

What Are AI Campaigns?

Instead of manually contacting hundreds of leads, you can define a target audience and a message template. The AI then generates a personalized version of the message for each recipient and executes the outreach automatically.

Campaign Types

- **AI Email Campaigns**: Send a sequence of personalized emails.
- **AI Call Campaigns**: Initiate automated phone calls where an AI agent delivers a message or engages in a simple conversation.

Creating Your First Campaign

1. Navigate to **AI Campaigns → Create New Campaign**.
2. **Name Your Campaign** and choose the type (Email or Call).
3. **Define Your Audience**: This is the most important step.
    - **Use Tags**: Target a list of contacts with a specific tag (e.g., "2025 Trade Show Leads").
    - **Use Filters**: Create a dynamic list based on record properties (e.g., "All leads in the 'Manufacturing' industry that are 'Unqualified'").
    - **Upload a CSV**: Use a one-time list for a specific campaign.
4. **Compose Your Message/Prompt**:
    - For emails, write a template using **merge fields** for personalization (e.g., `{{contact.first_name}}`).
    - For calls, write the core script or prompt for the AI to use.
5. **Set the Schedule**:
    - Define the start and end dates.
    - Set the **throttling** (e.g., "no more than 100 emails per day") to control the volume.
    - Configure retry logic for failed attempts.
6. **Review and Launch**.

Monitoring Campaign Performance

The campaign dashboard provides key metrics:

- **Sent/Attempted**: The total number of messages sent or calls initiated.
- **Delivered/Connected**: Successful deliveries or connections.
- **Opened/Replied** (for emails): Engagement metrics.
- **Conversion Rate**: The percentage of the audience that completed the desired action (e.g., clicked a link, scheduled a meeting).

Compliance and Best Practices

- **Honor Opt-Outs**: Ensure your campaigns automatically exclude anyone who has unsubscribed.
- **Follow Regulations**: Be aware of and comply with regulations like CAN-SPAM (for email) and TCPA (for calls).

- **Start Small**: Run a small test campaign first to check for errors and gauge performance before launching to a large audience.
- **Be Authentic**: Even though it's automated, your messaging should be genuine and provide value.

Part 4: Analysis and Best Practices

Chapter 11: Reporting and Analytics

Data is only useful if you can understand it. Aisha CRM's reporting tools help you visualize your performance and identify trends.

Standard Reports

Aisha CRM comes with several out-of-the-box reports.

- **Sales Pipeline Report**: Your main sales dashboard. Shows opportunities by stage, weighted forecast, and win/loss rates.
- **Lead Source Analysis**: See which marketing channels are generating the most leads and which ones are converting at the highest rate.
- **Activity Report**: Track your team's productivity. See the volume of calls, emails, and meetings logged over time. Filter by team member to see individual performance.
- **Sales Velocity Report**: Measures how long it takes for an opportunity to move from creation to close. A decreasing velocity means your team is closing deals faster.

Exporting Your Data

You can export data from any report or list view.

- **PDF Export**: Creates a clean, presentation-ready document with charts and graphs. Ideal for sharing with management.
- **CSV Export**: Exports the raw data into a spreadsheet format. Use this if you want to perform your own analysis in Excel, Google Sheets, or another BI tool.

Creating Saved Views for Custom Reports

While you may not be able to build reports from scratch, you can create powerful, reusable report views.

1. Go to a module list, like **Opportunities**.
2. **Apply Filters**: Add the criteria for your report (e.g., `Stage = "Negotiation"` AND `Amount > 10000`).
3. **Select Columns**: Choose which data columns you want to see in your view.
4. **Sort the Data**: Sort by close date, amount, or any other field.
5. **Save the View**: Click the "Save View" button and give it a descriptive name (e.g., "Large Deals in Negotiation"). This view will now be available in a dropdown menu for you to access anytime.

Chapter 12: Tips, Tricks, and Best Practices

Becoming a power user of Aisha CRM involves building good habits and learning a few tricks.

Daily Habits for Success

- **The 5-Minute Morning Review**: Start your day by checking your dashboard for priorities.
- **Log It or It Didn't Happen**: Log every meaningful customer interaction immediately. Don't wait until the end of the day.
- **The 10-Minute End-of-Day Wrap-up**: Update your opportunities, complete your tasks, and plan your follow-ups for tomorrow.

Data Quality is Everyone's Responsibility

A CRM is only as good as the data in it.

- **No Duplicates**: Always search before you create a new record.
- **Be Consistent**: Use tags and custom fields consistently across your team.
- **Add Context**: Use the notes field to add "why" behind the data. Why did the customer buy? Why was the deal lost?

Time Management Tips

- **Use Keyboard Shortcuts**: Learn the shortcuts for common actions like creating new records or saving forms.
- **Batch Your Tasks**: Block out time on your calendar to do similar tasks together (e.g., make all your follow-up calls from 10 AM to 11 AM).
- **Let the AI Help**: Use the AI Assistant for quick data entry and updates to avoid clicking through multiple screens.

Security Best Practices

- **Use a Strong Password** and do not share it.
- **Log Out** on shared computers.
- **Be Mindful of Permissions** when sharing records or reports.

Appendices

Appendix A: Glossary of Terms

- **Account**: A company or organization.
- **Activity**: A task, event, call, email, or note.
- **Campaign**: A coordinated marketing or sales outreach effort.
- **Contact**: An individual person.
- **Conversion**: The process of turning a Lead into a Contact, Account, and Opportunity.
- **Dashboard**: A customizable homepage with key metrics and reports.
- **Forecast**: A prediction of future sales revenue based on your open pipeline.
- **Kanban**: A visual, card-based view of records, often used for pipelines.
- **Lead**: An unqualified prospect at the beginning of the sales process.
- **Opportunity**: A potential sales deal that you are tracking.
- **Owner**: The user responsible for a specific record.
- **Pipeline**: The series of stages an opportunity goes through.
- **Stage**: A single step in your pipeline (e.g., "Qualification," "Proposal").
- **Tag**: A label used to categorize and filter records.

Appendix B: Frequently Asked Questions (FAQ)

Q: How do I reset my password?
A: Click the "Forgot Password?" link on the login screen. If you are already logged in, you can change it in your Profile Settings.

Q: Can I merge duplicate contacts?
A: Yes. Aisha CRM has a duplicate detection and merge feature. Select the records you believe are duplicates and look for a "Merge" button. An admin may need to enable this for you.

Q: How do I share a record with a teammate?
A: You can reassign ownership of the record to them, or if you just want to bring it to their attention, use an @mention in a note (e.g., "@John Smith, can you take a look at this?").

Q: Why can't I see a specific record?
A: It's likely a permissions issue. The record may be owned by someone else and not shared with you. Contact the record owner or your administrator.

Q: Can I use Aisha CRM on my mobile phone?
A: Yes, the application is designed to be responsive. However, for data-intensive tasks like reporting or bulk imports, a desktop browser is recommended.

Appendix C: Quick Start Checklists

Checklist for New Users

- [ ] Set up your profile (photo, timezone).
- [ ] Customize your dashboard.
- [ ] Create your first Contact.
- [ ] Log your first Activity (e.g., a call or note).
- [ ] Ask the AI Assistant a question.
- [ ] Explore the different modules in the navigation bar.

Checklist for Sales Teams

- [ ] Import your existing contacts and leads.
- [ ] Create Opportunities for all your active deals.
- [ ] Ensure every Opportunity has an Amount, Close Date, and Stage.
- [ ] Schedule follow-up Activities for all your open Opportunities.
- [ ] Review your pipeline in the Kanban view with your team.

Checklist for Managers

- [ ] Create Saved Views for key team reports.
- [ ] Schedule a recurring weekly meeting to review the team dashboard.
- [ ] Define a consistent set of Tags for your team to use.
- [ ] Launch a simple AI Campaign to re-engage old leads.
- [ ] Monitor the main sales and activity reports for trends.

Need more help? Use the AI Assistant in the app or contact your system administrator.