Aisha CRM - Comprehensive User Guide

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Aisha CRM — User Guide

Welcome to Aisha CRM! This guide will help you manage contacts, accounts, opportunities, and activities to keep your customer relationships organized and productive.

> Tip: Use the "Download PDF Guide" button in the app to save this guide for offline reference.

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Chapter 1: Getting Started

Your First Login

1. Open Aisha CRM in your browser
2. Sign in with your email and password
3. Complete your profile by clicking your avatar in the top right
4. Set your preferences (timezone, date format)

Understanding Your Role

- **Employee**: Access your own records and those assigned to you
- **Manager**: View team data and run reports
- **Admin**: Manage users and system settings

Navigation Basics

- **Left Menu**: Access different sections (Dashboard, Contacts, Accounts, Leads, Opportunities, Activities, Reports)
- **Search Bar**: Find any contact, account, or opportunity quickly
- **Quick Actions**: Create new records with one click
- **Profile Menu**: Access settings and help

Your Profile Settings

Keep your profile updated:

- Name, phone, and department
- Timezone (important for scheduling)
- Email preferences
- Avatar photo

Chapter 2: Your Dashboard

Your dashboard is your daily command center.

Dashboard Widgets

- **Metrics**: Quick view of contacts, leads, opportunities, and pipeline value
- **Recent Activities**: Latest calls, meetings, and tasks
- **Upcoming Tasks**: What needs your attention today
- **Pipeline Chart**: Visual overview of your opportunities by stage
- **Activity Trends**: Track your team's engagement over time

Daily Workflow

1. **Morning**: Review your dashboard for urgent tasks and scheduled activities
2. **During the Day**: Log calls, meetings, and notes as they happen
3. **End of Day**: Complete tasks and schedule follow-ups for tomorrow

Customizing Your View

- Drag widgets to rearrange them
- Show/hide widgets based on your needs
- Filter by date ranges and team members

Chapter 3: Managing Contacts

Contacts are the people you work with every day.

Creating a Contact

1. Click **"+ Add Contact"** or use the quick action menu
2. Enter the required information:
    - First Name and Last Name
    - Email and Phone
    - Job Title and Company
3. Link to an existing Account (or create a new one)
4. Add tags for easy filtering (e.g., "VIP", "Partner", "Prospect")
5. Click **Save**

Finding Contacts

- **Search**: Type a name, email, or phone number in the search bar
- **Filters**: Use the filter panel to narrow by tags, owner, or status
- **Sort**: Click column headers to sort alphabetically or by date

Contact Details Page

Each contact has a comprehensive view:

- **Overview**: Basic info, contact details, and social links
- **Timeline**: All activities, notes, and interactions in chronological order
- **Opportunities**: Related deals and their status
- **Activities**: Scheduled and completed calls, meetings, tasks
- **Notes**: Important information to remember

Quick Actions on Contacts

- **Call**: Log a phone call with notes
- **Email**: Track email outreach
- **Schedule**: Set up a meeting or follow-up
- **Add Note**: Capture important details

Importing Contacts

Need to add many contacts at once?

1. Go to **Contacts → Import**
2. Download the CSV template
3. Fill in your contact data (keep the column headers)
4. Upload the file
5. Map the columns to match Aisha's fields
6. Review the preview and fix any issues
7. Click **Import**

> Tip: Keep email and phone formats consistent for better matching.

Best Practices

- Always link contacts to their company (Account)
- Add notes after every important conversation
- Use tags to segment your contacts (e.g., "Hot Lead", "Decision Maker")
- Keep contact info updated as it changes

Chapter 4: Managing Accounts

Accounts represent the companies you do business with.

Creating an Account

1. Click **"+ Add Account"**
2. Enter the company name (required)
3. Add details:
    - Website and phone
    - Industry and employee count
    - Address
    - Revenue (if known)
4. Assign an owner and add tags
5. Click **Save**

Account Details Page

- **Overview**: Company information and key stats
- **Contacts**: All people at this company
- **Opportunities**: Active and closed deals
- **Activities**: All interactions with this account
- **Notes**: Important account-level information

Linking Contacts to Accounts

When you create a contact, link them to their company. This helps you:

- See all people at a company in one place
- Track company-wide relationships
- Understand the full account history

Account Types

Use tags or custom fields to categorize accounts:

- **Prospect**: Potential customers
- **Customer**: Active accounts
- **Partner**: Strategic partners
- **Competitor**: Track competitive intelligence

Best Practices

- Keep one account per company (avoid duplicates)
- Update account health based on recent interactions
- Link all relevant contacts to the account
- Add notes about company-wide initiatives or changes

Chapter 5: Working with Leads

Leads are potential customers you're qualifying.

Creating a Lead

1. Click **"+ Add Lead"**
2. Enter basic information:
    - First Name, Last Name
    - Company Name
    - Email and Phone
    - Lead Source (how you found them)
3. Set priority (Low, Normal, High, Urgent)
4. Choose a status (New, Contacted, Qualified, etc.)
5. Click **Save**

Lead Statuses

- **New**: Just captured, not yet contacted
- **Contacted**: Initial outreach completed
- **Qualified**: Meeting your criteria for follow-up
- **Unqualified**: Not a fit right now
- **Converted**: Turned into a Contact and Opportunity

Lead Scoring

Aisha automatically scores leads 0-100 based on:

- Profile completeness
- Company fit
- Engagement level
- Lead source quality

Use the score to prioritize your outreach.

Converting Leads

When a lead is qualified and ready to buy:

1. Open the lead detail page
2. Click **"Convert Lead"**
3. Choose to create:
    - A new Contact (or link to existing)
    - A new Account (or link to existing)
    - A new Opportunity (optional)
4. All notes and activities transfer automatically
5. Click **Convert**

Best Practices

- Respond to new leads within 24 hours

- Update lead status after each interaction
- Convert qualified leads promptly
- Keep lead source data accurate for reporting

Chapter 6: Managing Opportunities

Opportunities are your active sales deals.

Creating an Opportunity

1. Click **"+ Add Opportunity"**
2. Enter deal information:
    - Opportunity Name (e.g., "Acme Corp - Annual License")
    - Expected Revenue
    - Close Date (when you expect to close)
3. Link to an Account and primary Contact
4. Choose the Stage (see stages below)
5. Add probability (% chance to close)
6. Enter next steps
7. Click **Save**

Opportunity Stages

Move opportunities through these stages:

- **Prospecting**: Initial contact and qualification
- **Qualification**: Confirming fit and budget
- **Proposal**: Preparing and presenting your offer
- **Negotiation**: Working through terms and pricing
- **Closed Won**: Deal successfully closed!
- **Closed Lost**: Deal didn't work out this time

Pipeline Views

List View: See all opportunities in a sortable table

- Sort by amount, close date, stage, owner
- Filter by date range, owner, or stage

Kanban View: Drag and drop opportunities between stages

- Visual pipeline overview
- Quick stage updates
- Spot bottlenecks easily

Managing Your Pipeline

- **Update regularly**: Keep stages current to maintain accurate forecasts
- **Set next steps**: Always know what action to take next
- **Review weekly**: Check your pipeline with your team
- **Track key dates**: Monitor close dates and follow-up dates

Probability and Forecasting

Each stage has a typical win probability:

- Prospecting: 10%
- Qualification: 25%
- Proposal: 50%
- Negotiation: 75%
- Closed Won: 100%
- Closed Lost: 0%

Your weighted forecast = (Amount × Probability) for all open deals.

Best Practices

- Keep opportunity names descriptive
- Update stages as soon as they change
- Document why you win or lose deals
- Review lost opportunities for patterns

Chapter 7: Activities & Tasks

Activities keep your work organized and documented.

Activity Types

- **Call**: Log phone conversations
- **Email**: Track email outreach
- **Meeting**: In-person or virtual meetings
- **Task**: To-do items and follow-ups
- **Note**: Quick observations or reminders
- **Demo**: Product demonstrations
- **Proposal**: Proposal presentations

Creating an Activity

1. Click **"+ Add Activity"**
2. Choose the activity type
3. Enter details:
    - Subject (what is this about?)
    - Description
    - Due date and time
    - Priority (Low, Normal, High, Urgent)
4. Link to related records (Contact, Account, Lead, Opportunity)
5. Set a reminder (optional)
6. Click **Save**

Activity Statuses

- **Scheduled**: Planned for a specific time
- **In Progress**: Currently working on it
- **Completed**: Finished
- **Cancelled**: No longer needed

Your Activity Calendar

Access your calendar from the main navigation:

- **Month View**: See your activities at a glance
- **Week View**: Detailed weekly schedule
- **Day View**: Focus on today's tasks
- **Agenda**: List view of upcoming activities

Managing Your Activities

- **Drag and Drop**: Reschedule by dragging events to new times
- **Quick Complete**: Mark tasks done with one click
- **Filters**: Show only certain types or priorities
- **Sync**: (Coming soon) Sync with Google Calendar or Outlook

Best Practices

- Log every customer interaction as an activity
- Set reminders for important follow-ups
- Complete activities promptly to keep your calendar accurate
- Use clear, descriptive subjects
- Link activities to the relevant contact or opportunity

Chapter 8: Using the AI Assistant

Aisha's AI Assistant helps you work faster and smarter.

What the AI Assistant Can Do

- **Answer questions**: "Show me all opportunities closing this month"
- **Create records**: "Add a meeting with Sarah Johnson tomorrow at 2pm"
- **Update data**: "Change the Acme opportunity to Proposal stage"
- **Search**: "Find all contacts at Microsoft"
- **Analyze**: "Summarize my calls from last week"
- **Get insights**: "What's my pipeline value?"

How to Use It

1. Click the AI Assistant icon or press the shortcut key
2. Type or speak your request in plain English
3. Review the AI's response or action
4. Confirm any changes before they're saved

Example Requests

Finding information:

- "Show high-value opportunities"
- "List my open tasks"
- "Find contacts in San Francisco"

Creating records:

- "Schedule a call with John tomorrow"
- "Add a note to Acme Corp about their budget"
- "Create a follow-up task for next Monday"

Updating records:

- "Move Beta Corp opportunity to Negotiation"
- "Mark the proposal task as complete"
- "Change the close date to next Friday"

Analyzing data:

- "How many leads did I add this week?"
- "What's my average deal size?"
- "Show my team's activity this month"

Privacy and Security

- The AI only accesses data you have permission to see
- All interactions are logged for audit purposes
- Sensitive actions require confirmation
- Your data stays within your tenant (no external sharing)

Tips for Better Results

- Be specific: "Contact at Acme Corp" is better than "that person"
- Use full names when possible
- Confirm important changes before saving
- If you get unexpected results, rephrase your question

Chapter 9: AI Campaigns

Run outreach campaigns at scale while keeping messages personal.

What Are AI Campaigns?

AI Campaigns let you reach many prospects or customers with personalized messages. The AI customizes each message based on the recipient's profile, company, and interaction history.

Campaign Types

- **AI Call Campaigns**: Automated phone outreach with AI-generated scripts
- **AI Email Campaigns**: Personalized email sequences

Creating a Campaign

1. Go to **AI Campaigns → Create New**
2. Choose campaign type (Calls or Emails)
3. Select your audience:
    - Use tags to target specific groups
    - Filter by lead status, account type, or custom fields
    - Import a CSV list
4. Write your message template or AI prompt
5. Set schedule and throttling (how many per day)
6. Review and launch

Message Personalization

The AI automatically includes:

- Recipient's name and company
- Relevant context from their CRM record
- Recent interactions or activities
- Custom merge fields you define

Tracking Campaign Performance

Monitor your campaign dashboard:

- **Attempts**: How many messages sent
- **Connects**: Successful deliveries
- **Replies**: Responses received
- **Conversions**: Goals achieved (meetings, demos, sales)

Campaign Best Practices

- Start with a small test group before full launch
- Write clear, concise messages focused on value
- Respect opt-outs and unsubscribe requests
- Monitor performance and adjust your approach
- Follow up on replies promptly

Compliance

- Honor do-not-contact lists
- Follow local regulations (CAN-SPAM, GDPR, etc.)
- Provide clear opt-out options
- Keep your messaging honest and on-brand

Chapter 10: Reports & Insights

Understand your business performance with built-in reports.

Dashboard Reports

Your main dashboard shows key metrics:

- Total contacts, leads, accounts, opportunities
- Pipeline value and weighted forecast
- Activity volume and trends
- Lead sources and conversion rates

Standard Reports

Sales Pipeline Report

- Opportunities by stage
- Win/loss rates
- Average deal size
- Sales velocity (days to close)

Lead Report

- Lead sources and their performance
- Conversion rates by source
- Lead aging (time in each status)
- Lead score distribution

Activity Report

- Calls, meetings, emails by day/week/month
- Completion rates
- Overdue tasks
- Activity by owner

Account Report

- Customer health scores
- Account value and size
- New vs. existing customers
- At-risk accounts

Exporting Data

PDF Export: Great for presentations and sharing

- Dashboard snapshots
- Formatted reports with charts
- Print-friendly layouts

CSV Export: Perfect for deeper analysis

- Raw data for Excel or BI tools
- Custom fields included
- Filter before exporting

Creating Custom Views

1. Start with a module (Contacts, Leads, etc.)
2. Apply filters for the data you want
3. Choose which columns to show
4. Sort by your preferred field
5. Save the view with a name
6. Access it anytime from the saved views menu

Best Practices

- Review key metrics weekly with your team
- Export data for monthly business reviews
- Create saved views for common reports
- Track trends over time, not just snapshots
- Share insights with stakeholders

Chapter 11: Tips & Best Practices

Daily Habits

- **Morning**: Review dashboard, check scheduled activities
- **Throughout the day**: Log interactions immediately
- **End of day**: Complete tasks, schedule tomorrow's follow-ups

Data Quality

- Keep contact information updated
- Avoid duplicate records
- Use tags consistently
- Link contacts to accounts
- Add notes with context

Pipeline Management

- Update opportunity stages weekly (at minimum)
- Set realistic close dates
- Document next steps for every deal
- Review lost opportunities to learn
- Keep probability aligned with stage

Collaboration

- Assign clear owners to every record
- Use @mentions in notes to notify teammates
- Share important updates via the activity feed
- Review team performance in regular meetings

Time Management

- Use calendar reminders for important follow-ups
- Batch similar tasks (e.g., all calls in one block)
- Complete high-priority tasks first
- Set realistic due dates

Using AI Effectively

- Ask the AI Assistant to save time on routine tasks
- Review AI-generated content before using it
- Use AI campaigns for scale, manual outreach for VIPs
- Trust but verify AI insights

Security and Privacy

- Log out when using shared devices
- Don't share your password
- Review permissions before sharing records
- Follow your company's data handling policies

Appendix: Keyboard Shortcuts

Speed up your workflow with these shortcuts:

- **N**: Create new record in current module
- **T**: Go to Today (in calendar view)
- **Arrow Left**/**Right**: Navigate calendar periods
- **M**/**W**/**D**: Switch to Month/Week/Day view
- **Ctrl/⌘ + K**: Open command palette (if enabled)
- **Ctrl/⌘ + S**: Save current form
- **Esc**: Close dialog or modal

Appendix: Glossary

Account: A company or organization you do business with

Activity: Any interaction or task (call, email, meeting, task, note)

Campaign: Coordinated outreach to multiple prospects or customers

Contact: An individual person (usually linked to an Account)

Lead: A potential customer who hasn't been fully qualified yet

Opportunity: A potential deal with estimated value and close date

Owner: The person responsible for a record (contact, lead, opportunity)

Pipeline: All your active opportunities organized by stage

Stage: Where an opportunity is in your sales process

Tag: A label used to categorize and filter records

Appendix: FAQ

Q: How do I add a teammate?
A: Ask your Admin to invite them via Settings → User Management.

Q: Can I import my existing contacts?
A: Yes! Use the CSV import feature in the Contacts module.

Q: How do I delete a record?
A: Open the record and look for the Delete button (usually in the actions menu). Some records may require admin permission to delete.

Q: Can I export my data?
A: Yes. Use the Export button in any module to download a CSV file.

Q: How do I link a contact to an account?
A: When creating or editing a contact, use the Account field to search and select the company.

Q: What happens when I convert a lead?
A: The lead becomes a contact, and all notes and activities are preserved. You can also create an opportunity at the same time.

Q: Can I undo a deletion?
A: Contact your admin immediately. Some records can be recovered within a limited time window.

Q: How do I change my password?
A: Go to Profile Settings → Security → Change Password.

Q: Can I use Aisha on my phone?
A: Yes, but a desktop browser is recommended for the best experience.

Q: Where can I get help?
A: Use the AI Assistant for quick questions, or contact your team admin or support.

Quick Start Checklist

For New Users

- [ ] Complete your profile (name, photo, timezone)
- [ ] Learn the navigation menu
- [ ] Create your first contact
- [ ] Log an activity (call or note)
- [ ] Try asking the AI Assistant a question
- [ ] Review your dashboard

For Sales Teams

- [ ] Import your contacts or leads
- [ ] Create opportunities for active deals
- [ ] Set up your calendar with activities
- [ ] Schedule daily follow-ups

- [ ] Review your pipeline weekly

For Managers

- [ ] Create saved views for team reports
- [ ] Set up recurring dashboard reviews
- [ ] Define tags and categories for your team
- [ ] Launch an AI campaign for outreach
- [ ] Track team performance metrics

Need more help? Ask your team admin or use the AI Assistant in the app!