

Aisha CRM - Comprehensive User Guide

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Comprehensive User Guide

Welcome to the complete Aisha CRM User Guide. This comprehensive 14-chapter guide covers everything from getting started to advanced features.

Quick Access to Chapters

Getting Started

- **Chapter 1: Introduction** - About Aisha CRM, what makes it special, system requirements
- **Chapter 2: Getting Started** - First login, interface overview, navigation basics, user profile setup

Core CRM Features

- **Chapter 3: Core Features** - Dashboard overview, AI Executive Assistant, calendar management, search and filters
- **Chapter 4: Contact Management** - Creating and managing contacts, activities, bulk operations
- **Chapter 5: Account Management** - Creating accounts, account hierarchy, relationships
- **Chapter 6: Lead Management** - Creating leads, qualification, conversion, source tracking
- **Chapter 7: Opportunity Management** - Creating opportunities, pipeline stages, revenue forecasting
- **Chapter 8: Activities and Tasks** - Activity types, creation, management, and reporting

AI-Powered Features

- **Chapter 9: AI Telephony and Call Management** - Call tracking, call history, AI-generated notes, automatic follow-ups, call outcomes
- **Chapter 10: AI Campaigns** - Campaign types, creation, progress tracking, performance metrics

Advanced Features

- **Chapter 11: Reports and Analytics** - Dashboard reports, custom reports, exporting data, data visualization
- **Chapter 12: Workflows and Automation** - Understanding workflows, triggers, workflow management
- **Chapter 13: Advanced Features** - Document processing, email integration, business card scanner, duplicate detection
- **Chapter 14: Troubleshooting** - Common issues, error messages, getting help

Appendices

- **Appendix A: Keyboard Shortcuts** - Quick reference for keyboard commands
 - **Appendix B: Glossary** - CRM terminology and definitions
 - **Appendix C: FAQ** - Frequently asked questions and answers
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Download Complete Guide

The full User Guide with detailed screenshots, step-by-step instructions, and best practices is available as a downloadable PDF document.

Use the "Download PDF Guide" button in the application to get the complete documentation — this PDF is generated directly from this markdown.

Key Features Covered

AI Executive Assistant

Your personal AI assistant that can:

- Search and retrieve CRM data
- Create and update records via natural language
- Answer questions about your business
- Provide insights and recommendations
- Access via chat interface or WhatsApp integration

AI Telephony

Automated call tracking and management:

- Automatic call logging and notes
- AI-generated call summaries
- Follow-up task creation
- Call outcome tracking
- Integration with telephony providers

AI Campaigns

Automated outreach at scale:

- AI-powered call campaigns
- Email campaigns with AI content generation
- Progress tracking and performance metrics
- Target contact management
- Campaign scheduling and automation

Complete CRM Functionality

- Contact, Account, Lead, and Opportunity management
 - Activity tracking and calendar management
 - Reports and analytics
 - Document processing and business card scanning
 - Cash flow management
 - Employee management with role-based access
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Quick Start Checklist

For New Users:

1. Complete your user profile (Chapter 2.4)
2. Learn the dashboard (Chapter 3.1)
3. Create your first contact (Chapter 4.1)
4. Try the AI Assistant (Chapter 3.2)
5. Set up your calendar (Chapter 3.3)

For Sales Teams:

1. Import contacts (Chapter 4.4)
2. Create leads (Chapter 6.1)
3. Set up pipeline (Chapter 7.2)
4. Log activities (Chapter 8.2)
5. Review reports (Chapter 11.1)

For Managers:

1. Configure team access (Admin Guide)
2. Set up workflows (Chapter 12)
3. Create custom reports (Chapter 11.2)
4. Monitor team performance (Chapter 11.1)
5. Set up AI campaigns (Chapter 10)

Finding What You Need

Use the search function in the app to find specific topics quickly. The User Guide includes:

- Detailed step-by-step instructions
- Screenshots and visual guides
- Best practices and tips
- Troubleshooting solutions
- Real-world examples

Need Help?

- **AI Assistant:** Ask questions directly in the CRM
- **Support:** support@ai-sha.com
- **Documentation:** Use the Download button in-app for the PDF User Guide
- **Admin Guide:** Administrators can download the Admin Guide PDF for system configuration