CRM Pro User Guide
Your Complete Guide to Getting Started and Maximizing Your CRM

Welcome to CRM Pro! This guide will walk you through everything you need to know to set up your account, manage your team, and leverage our powerful CRM features to grow your business.

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Account Setup

Initial Registration
1. **Visit** crmpro.com and click "Start Free Trial"
2. **Enter** your business email address
3. **Create** a secure password (minimum 8 characters, include numbers and symbols)
4. **Verify** your email address by clicking the link sent to your inbox
5. **Complete** the welcome questionnaire:
   - Company name and size
   - Industry type
   - Primary use case (sales, marketing, customer service)

Company Profile Configuration
1. **Navigate** to Settings → Company Profile
2. **Upload** your company logo (recommended: 200x200px PNG)
3. **Fill in** company details:
   - Business address
   - Phone number
   - Website URL
   - Time zone

   - Currency preferences
4. **Configure** business hours for accurate activity tracking
5. **Set** your sales process stages (default: Lead → Qualified → Proposal → Closed)

Security Settings
1. **Enable** two-factor authentication (2FA) in Settings → Security
2. **Set** password requirements for your team
3. **Configure** IP restrictions if needed (Pro feature)
4. **Review** data retention policies

Adding and Managing Users

Inviting Team Members
1. **Go to** Settings → User Management
2. **Click** "Invite User"
3. **Enter** the team member's email address
4. **Select** their role:
   - **Admin**: Full system access
   - **Manager**: Can manage team and view all data
   - **Sales Rep**: Can manage own leads and customers
   - **Viewer**: Read-only access to assigned records
5. **Assign** territories or teams (optional)
6. **Click** "Send Invitation"

User Role Management
Admin Permissions:
- Add/remove users
- Modify system settings
- Access billing and usage data
- Create custom fields and workflows

Manager Permissions:
- View team performance
- Assign leads and customers
- Generate reports
- Modify team member permissions

Sales Rep Permissions:
- Create and edit own contacts
- Manage assigned deals
- Update pipeline stages
- Generate personal reports

Deactivating Users
1. **Navigate** to Settings → User Management
2. **Find** the user to deactivate
3. **Click** the three dots menu
4. **Select** "Deactivate User"
5. **Choose** what to do with their data:
   - Reassign to another user
   - Keep unassigned
   - Archive completely

Adding and Managing Customers

Creating Customer Records
1. **Click** "Contacts" in the main navigation
2. **Select** "Add New Contact"
3. **Fill in** basic information:
   - First and last name
   - Company name
   - Email address (primary and secondary)
   - Phone numbers
   - Physical address
4. **Add** custom fields relevant to your business
5. **Set** contact status (Lead, Customer, Partner, etc.)
6. **Assign** to a team member
7. **Click** "Save"

Bulk Import Customers
1. **Go to** Contacts → Import
2. **Download** the CSV template
3. **Prepare** your data with columns matching template fields
4. **Upload** your CSV file
5. **Map** columns to CRM Pro fields
6. **Review** and validate data
7. **Click** "Import Contacts"

Contact Organization
Tags and Categories:
- Use tags for flexible grouping (e.g., "VIP", "Newsletter Subscriber")
- Create categories for formal classification (e.g., "Enterprise", "SMB")

Contact Lists:

- Create dynamic lists based on criteria
- Build static lists for campaigns
- Set up automated list updates

Customer Interaction Tracking
1. **Open** any customer record
2. **Use** the Activity Timeline to log:
   - Phone calls
   - Emails
   - Meetings
   - Notes
   - Tasks
3. **Set** follow-up reminders
4. **Attach** relevant documents

Upgrading to Pro

Plan Comparison
Starter Plan (Free):
- Up to 3 users
- 1,000 contacts
- Basic reporting
- Email support

Pro Plan ($29/user/month):
- Unlimited users
- 50,000 contacts
- Advanced reporting and dashboards
- Custom fields and workflows
- API access
- Priority support
- Advanced integrations

Enterprise Plan ($59/user/month):
- Everything in Pro
- Unlimited contacts
- Advanced security features
- Dedicated account manager
- Custom training
- SLA guarantee

Upgrade Process

1. **Navigate** to Settings → Billing
2. **Click** "Upgrade Plan"
3. **Select** your desired plan
4. **Choose** billing frequency (monthly or annual - save 20%)
5. **Enter** payment information
6. **Review** and confirm upgrade
7. **Access** new features immediately

What Happens After Upgrade
- All Pro features activate instantly
- No data migration required
- Existing workflows continue uninterrupted
- New user slots become available
- Enhanced support channels open

Creating and Viewing Dashboards

Default Dashboard Overview
Your default dashboard includes:
- Sales pipeline summary
- Recent activity feed
- Top performing team members
- Revenue trends (last 30 days)
- Task reminders
- Lead conversion rates

Creating Custom Dashboards
1. **Click** "Dashboards" in main navigation
2. **Select** "Create New Dashboard"
3. **Choose** dashboard type:
   - Sales Performance
   - Marketing Analytics
   - Customer Service
   - Custom (blank)
4. **Add widgets** by clicking "+"
5. **Configure** each widget:
   - Select data source
   - Choose visualization type
   - Set filters and date ranges
   - Customize colors and labels

Available Widget Types

Charts:
- Bar charts for comparisons
- Line charts for trends
- Pie charts for distributions
- Funnel charts for conversion tracking

Data Displays:
- KPI cards for key metrics
- Tables for detailed data
- Progress bars for goals
- Activity feeds for updates

Dashboard Management
Sharing Dashboards:
1. **Open** the dashboard
2. **Click** "Share" button
3. **Select** users or teams
4. **Set** permissions (view or edit)
5. **Send** notification

Scheduling Reports:
1. **Go to** dashboard settings
2. **Enable** "Scheduled Reports"
3. **Set** frequency (daily, weekly, monthly)
4. **Choose** recipients
5. **Select** format (PDF or email summary)

Billing and Usage Management

Accessing Billing Information
1. **Navigate** to Settings → Billing
2. **View** current plan details
3. **Check** usage statistics:
   - Active users
   - Contact count
   - Storage used
   - API calls (Pro/Enterprise)

Payment Management
Updating Payment Methods:
1. **Click** "Payment Methods"
2. **Add** new card or bank account

3. **Set** as primary payment method
4. **Remove** old methods if desired

Viewing Invoices:
- All invoices are available in the Billing section
- Download PDFs for accounting
- Set up automatic receipt forwarding

Usage Monitoring
Contact Limits:
- Monitor contact usage in real-time
- Receive alerts at 80% and 95% capacity
- Automatic upgrade prompts when limits approached

User Management:
- Track active vs. inactive users
- Optimize licensing costs
- Receive monthly usage summaries

Cancellation and Downgrade
1. **Contact** support team for plan changes
2. **Data export** options available
3. **30-day** grace period for data retrieval
4. **Prorated** refunds for annual plans

Lead Management

Lead Capture
Web Forms:
1. **Go to** Marketing → Lead Capture
2. **Create** embedded forms for your website
3. **Customize** fields and styling
4. **Generate** embed code
5. **Track** form performance

Manual Lead Entry:
1. **Click** "Add Lead" from Contacts
2. **Fill** basic information
3. **Set** lead source
4. **Assign** to team member
5. **Set** priority level

Lead Qualification
Scoring System:
- Automatic scoring based on activities
- Custom scoring rules
- Manual score adjustments
- Score-based lead routing

Qualification Process:
1. **Review** lead information
2. **Conduct** qualification call
3. **Update** lead status
4. **Convert** to opportunity or disqualify
5. **Document** reasons and next steps

Lead Nurturing
Automated Sequences:
- Welcome email series
- Educational content delivery
- Follow-up reminders
- Re-engagement campaigns

Task Management:
- Automatic task creation
- Follow-up scheduling
- Team assignments
- Progress tracking

Sales Pipeline

Pipeline Configuration
1. **Navigate** to Settings → Sales Process
2. **Define** pipeline stages:
   - Initial Contact
   - Needs Assessment
   - Proposal
   - Negotiation
   - Closed Won/Lost
3. **Set** stage requirements and criteria
4. **Configure** automated actions per stage

Managing Opportunities
Creating Opportunities:

1. **Convert** qualified leads or
2. **Add** new opportunity directly
3. **Fill** opportunity details:
   - Deal value
   - Close date
   - Probability
   - Products/services
4. **Assign** to sales rep
5. **Set** stage and priority

Pipeline Actions:
- Drag and drop between stages
- Bulk update multiple deals
- Set up approval workflows
- Track deal progression

Forecasting
Revenue Forecasting:
- Automatic calculations based on deal values and probabilities
- Monthly and quarterly projections
- Historical trending
- Goal vs. actual tracking

Pipeline Analytics:
- Conversion rates by stage
- Average deal size
- Sales cycle length
- Win/loss analysis

Reporting and Analytics

Pre-built Reports
Sales Reports:
- Sales performance by rep
- Revenue by time period
- Lead conversion rates
- Pipeline velocity

Marketing Reports:
- Lead source effectiveness
- Campaign ROI
- Website form performance

- Email engagement metrics

Customer Reports:
- Customer lifetime value
- Churn analysis
- Support ticket trends
- Satisfaction scores

Custom Report Builder
1. **Go to** Reports → Custom Reports
2. **Select** data source
3. **Choose** fields to include
4. **Set** filters and criteria
5. **Select** visualization type
6. **Save** and schedule report

Advanced Analytics (Pro/Enterprise)
Predictive Analytics:
- Deal probability scoring
- Churn risk identification
- Revenue forecasting
- Lead scoring optimization

Comparative Analysis:
- Period-over-period comparisons
- Team performance benchmarking
- Goal tracking and variance analysis
- Trend identification

Integrations

Email Integration
Supported Platforms:
- Gmail
- Outlook
- Apple Mail
- IMAP/SMTP

Setup Process:
1. **Go to** Settings → Integrations
2. **Select** email provider
3. **Authenticate** your account

4. **Enable** sync preferences
5. **Test** integration

Marketing Tools
Popular Integrations:
- Mailchimp
- Constant Contact
- HubSpot
- ActiveCampaign

Business Applications
Accounting Software:
- QuickBooks
- Xero
- FreshBooks

Communication Tools:
- Slack
- Microsoft Teams
- Zoom

API Access (Pro/Enterprise)
Getting Started:
1. **Request** API key in Settings → API
2. **Review** documentation
3. **Test** endpoints
4. **Implement** custom integrations

Support and Troubleshooting

Getting Help
Support Channels:
- **Free Plan**: Email support (48-hour response)
- **Pro Plan**: Priority email + chat support (24-hour response)
- **Enterprise Plan**: Dedicated account manager + phone support (4-hour response)

Common Issues

Login Problems:
- Password reset via forgot password link
- Clear browser cache and cookies
- Check for browser compatibility

- Verify email address spelling

Data Sync Issues:
- Check integration settings
- Verify API quotas
- Review error logs
- Contact support with error details

Performance Issues:
- Clear browser cache
- Disable browser extensions
- Check internet connection
- Try different browser

Best Practices
Data Management:
- Regular data backups
- Consistent naming conventions
- Regular data cleanup
- User permission audits

System Optimization:
- Regular user training
- Workflow optimization
- Dashboard customization
- Integration maintenance

Training Resources
- Video tutorials in Help Center
- Webinar series every Tuesday
- Documentation library
- Community forum
- One-on-one training sessions (Enterprise)

Getting Started Checklist

Week 1:
- [ ] Complete account setup
- [ ] Add team members
- [ ] Import existing contacts
- [ ] Set up basic dashboards
- [ ] Configure email integration

Week 2:
- [ ] Customize sales pipeline
- [ ] Create lead capture forms
- [ ] Set up automated workflows
- [ ] Train team on basic features
- [ ] Review and optimize settings

Week 3:
- [ ] Generate first reports
- [ ] Set up additional integrations
- [ ] Create custom fields
- [ ] Implement lead scoring
- [ ] Schedule regular data reviews

Ongoing:
- [ ] Weekly pipeline reviews
- [ ] Monthly performance analysis
- [ ] Quarterly system optimization
- [ ] Regular user training updates
- [ ] Continuous process improvement

Contact Information

Support Team:
- Email: support@crmpro.com
- Chat: Available in-app (Pro/Enterprise)
- Phone: 1-800-CRM-PRO1 (Enterprise only)

Sales Team:
- Email: sales@crmpro.com
- Phone: 1-800-CRM-PRO2

Training:
- Email: training@crmpro.com
- Schedule: training.crmpro.com

Remember, CRM Pro is designed to grow with your business. Start with the basics and gradually implement advanced features as your team becomes more comfortable with the system. Our support team is always here to help you succeed!