

CRM Pro User Manual

Your Complete Guide to Customer Relationship Management

Getting Started

Welcome to CRM Pro! This guide will help you maximize your customer relationship management and grow your business efficiently.

Initial Setup

After signing up, complete your account setup by:

- Adding your company information and logo
- Importing existing customer data via CSV upload
- Setting up user permissions for team members
- Configuring your sales pipeline stages
- Connecting email integration (Gmail/Outlook supported)

Dashboard Overview

Your dashboard provides a real-time snapshot of your business:

- **Sales Pipeline:** Visual representation of deals in progress
- **Activity Feed:** Recent customer interactions and team activities
- **Performance Metrics:** Monthly sales, conversion rates, and revenue trends
- **Task Reminders:** Upcoming follow-ups and deadlines
- **Quick Actions:** Add contacts, create deals, schedule calls

Core Features

Contact Management

Adding Contacts: Click "New Contact" and enter customer details. The system automatically checks for duplicates and suggests potential matches.

Contact Profiles: Each contact includes communication history, deal records, notes, and custom fields you define. Use tags to categorize contacts by industry, size, or priority.

Bulk Operations: Import contacts via CSV, export filtered lists, or perform bulk updates using the Actions menu.

Deal Tracking

Creating Deals: Associate deals with contacts and assign values, close dates, and probability percentages. Choose from your custom pipeline stages.

Pipeline Management: Drag and drop deals between stages. The system tracks time spent in each stage and calculates velocity metrics.

Deal Collaboration: Add team members to deals, share notes, and set up automated notifications for stage changes.

Activity Management

Task Creation: Set follow-up reminders, schedule calls, and create custom task types. Tasks can be recurring and assigned to team members.

Email Integration: Send emails directly from contact profiles. All correspondence is automatically logged and searchable.

Meeting Scheduling: Built-in calendar integration allows customers to book meetings via shared links.

Reporting and Analytics

Standard Reports: Access pre-built reports for sales performance, pipeline analysis, activity summaries, and conversion rates.

Custom Reports: Create filtered reports using any data field. Save frequently used reports and schedule automated email delivery.

Export Options: Download reports as PDF, Excel, or CSV files for external analysis or presentations.

Advanced Features

Automation

Workflow Automation: Set up automated email sequences based on contact behavior or deal stages. Create rules for task assignment and follow-up scheduling.

Lead Scoring: Automatically rank prospects based on engagement, company size, and custom criteria you define.

Integration Capabilities

Email Platforms: Sync with Gmail, Outlook, and other major email providers for seamless communication tracking.

Calendar Integration: Connect Google Calendar or Outlook to sync meetings and availability.

Third-party Tools: Integrate with popular tools like Mailchimp, QuickBooks, and Zapier for extended functionality.

Mobile Access

Download the CRM Pro mobile app to access contacts, update deals, and log activities on the go. All data syncs in real-time across devices.

Tips for Success

Daily Habits: Start each day by reviewing your dashboard, checking task reminders, and updating deal progress.

Data Quality: Regularly clean your contact database by merging duplicates and updating outdated information.

Team Adoption: Encourage consistent use by setting up shared goals, regular training sessions, and celebrating wins tracked in the system.

Custom Fields: Create industry-specific fields that matter to your business, such as company size, technology stack, or decision-maker roles.

Getting Help

In-App Support: Click the help icon for instant access to tutorials, FAQs, and live chat support during business hours.

Training Resources: Access our video library and webinar schedule at help.crmpro.com for ongoing learning.

Community Forum: Connect with other users, share best practices, and get tips from CRM experts in our online community.

Support Channels: Email support@crmpro.com or call 1-800-CRM-HELP for technical assistance and account questions.

Remember, CRM Pro grows with your business. As you scale, explore our advanced features and consider upgrading to access enhanced analytics, increased storage, and priority support.