Easy Tender CRM - User Manual

Introduction

Easy Tender CRM is a lightweight, mobile-friendly CRM designed for managing client follow-ups, registrations, and tracking. It is optimized for small businesses and tender-based companies to streamline workflow.

Login & Roles

Login Types:
- Admin: Full control including data export, staff management.
- Staff: Can add, edit, manage their clients.
Default credentials: admin/1234 and staff/1234

Adding a Client

Fill client details in the Add Client form including name, company, mobile, city, state, follow-up date, remarks, and status. Click 'Save Client'. To edit, click 'Edit' in the table.

Statuses & Follow-up System

Available Statuses:
- Today Follow-up: Call today
- Future Follow-up: Call later
- Registered: Client enrolled
- Not Interested: Declined
Use Quick Action buttons to move between statuses.

Search, Import & Export

Search clients using the search box. Import CSV files to upload multiple clients at once. Export button allows downloading all data as CSV in a standardized format.

Mobile Optimization

CRM automatically adjusts for mobile. Sidebar collapses into a menu. Dark mode available with toggle button.

Splash Screen & Branding

CRM includes animated splash screen, branded logo, and company theme colors.

Support

For any issues:
Email: support@easytender.com
Phone: +91-98765-43210

PWA / APK Info

CRM structure supports PWA installation. It can later be converted to an Android APK.