FAQs

How do I contact SaleSync:
Email: salesynccrm@gmail.com
Phone: 9207 0251

What is the goal of SaleSync CRM:
SaleSync aims to provide affordable and easy to use and understand CRM services to all users. This is reflected in our pricing which is far cheaper than our competitors, and how the services we provide cover all the needs of a CRM without unnecessary ‘white noise’ features that will only confuse users.

What kind of clients is SaleSync CRM made for:
SaleSync CRM is made for all businesses, from start ups with a single employee to massive transnational corporations, as it contains all the necessary features for a CRM platform. Differently priced packages are available depending on the size and needs of the business.

How do I reset my password:
Your password can be reset through clicking the ‘Forgot My Password’ button on the login page. Upon doing this you will be required to enter your email address for your account, meaning a password reset code will be sent to your email. This code can then be used to reset your password by typing in a new password.

How do I view the services offered by SaleSync:
The services offered by SaleSync for meeting your CRM needs can be viewed by clicking the services tab in the top navbar on the SaleSync homepage.

How do I view the products offered by SaleSync:
The products and their corresponding prices offered can be viewed by clicking the products tab in the top navbar on the SaleSync homepage.

How does the dashboard get its data:
The dashboard gains its data from all of the pages on the SaleSync account and is automatically updated giving accurate data with graphs to allow ease of understanding. This means this page provides a strong overview of business operations.

How do I add tasks into SaleSync:
Items can be added by managers in SaleSync through clicking the add task button. From here the manager can provide a task description, client name the task is for, the

task priority, the due date of the task, the product and quantity of product the client wishes for and the staff member responsible for this task.

As a staff member how do I let my manager know I've completed my task(s) for them:
The manager can be made aware that you have completed your task(s) for them by clicking the pen icon for the corresponding task and changing its status to completed.

How do I see the sales history of an individual client:
By clicking the see History icon on the corresponding client card, the enter sales history of that client will be presented including what items were purchased and when they were purchased.

How do I add a new client to the client database:
Click the 'Add Client' icon in the top right corner and input thr nametheir name, email, their lead source, the client's position in their company, their mobile number and their address.

How do I edit the details of an existing client:
Client details can be edited by clicking the 'Edit Client' button in the top right hand corner of the clients page. From here the user needs to provide the client ID of the client they wish to edit and then input new client details to replace the old details.

How do I differentiate from Physical and Electronic Products:
When adding a product, the user can denote if it is a physical or electronic product through giving the electronic value box a true value if it is electronic or a false value if it is a physical product. If the product is physical the current level of stock needs to be added, if not, stock value will not be considered.

How do I delete products:
Multiple products can be deleted at once through clicking on the checkbox on the left of each product row for the products the user wishes to delete. Then the user simply needs to click on the bin icon on the top right of the title row and confirm this decision.

How do I know which sales in the sales history have been paid:
The sales which have been paid will have a green box with the word 'PAID' in it in the right hand side of the row of that sale.

How do I download a sales history report:

As a manager, you can download the specific items you wish for in a pdf sales report that can be easily printed off. This can be done by clicking the checkbox on the left for each product that you wish to be in your pdf report.

How do I turn dark mode on or off:
Dark mode can be turned on or off through clicking its icon in the side navbar when the user is logged in.

How do I sign out:
You can sign out by clicking the sign out button at the bottom of the side navbar. Doing so will take you to the homepage.