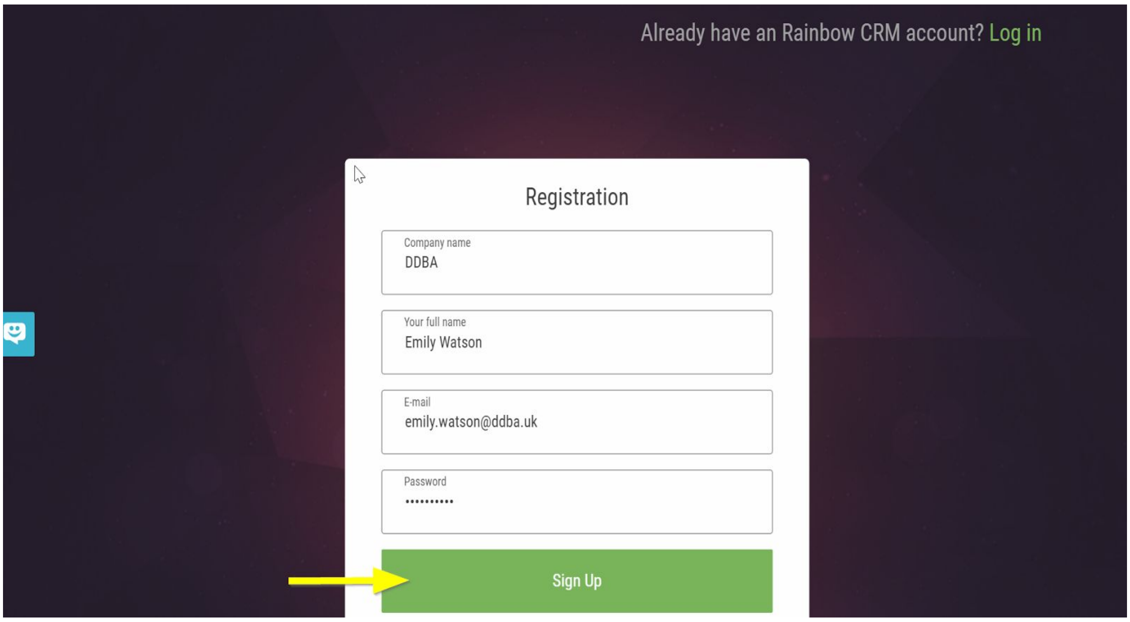
Welcome to our Rainbow CRM manual - the simple & effective CRM system. Let's start!

Account

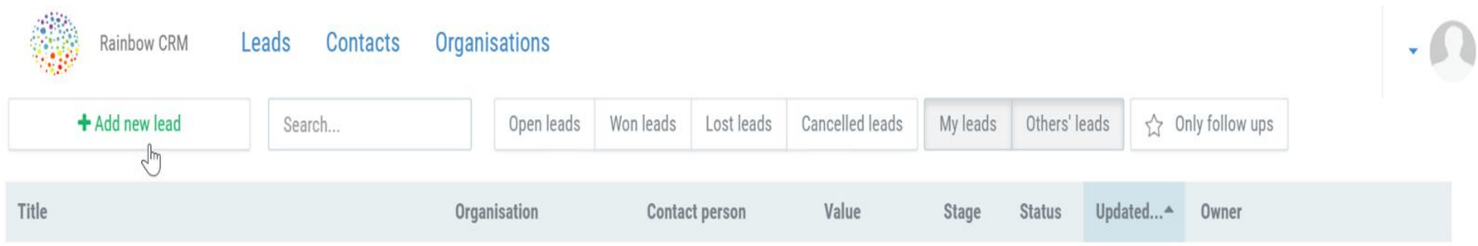
First off, to use Rainbow CRM, you need to register. After you have inserted the name of your company, your full name, work email address and password, please proceed to "Sign up".



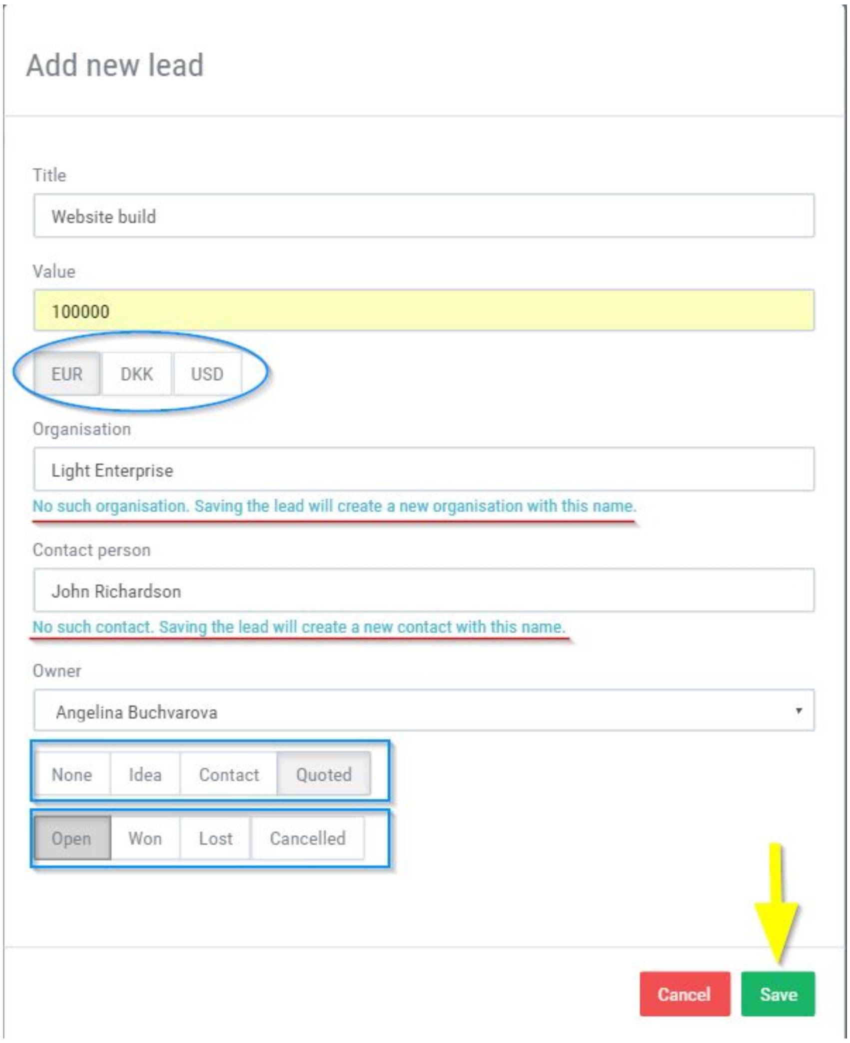
Now check your email and verify your account. Follow the instructions and the following window will open for you:

Log in using your email and password. It is more convenient to tick the "Remember Me" box to skip inputting your login details each time. In case your password has slipped your mind, click on "Forgot?". You need to input your email and proceed to setting up a new password.

Add a new lead



This is the dashboard of Rainbow CRM. The main navigation menu presents you with three categories: Leads, Contacts and Organisations. We will look into each one separately. Start by documenting your deals/leads. Pressing “Add new lead” will open the following pop-up for you to fill in.

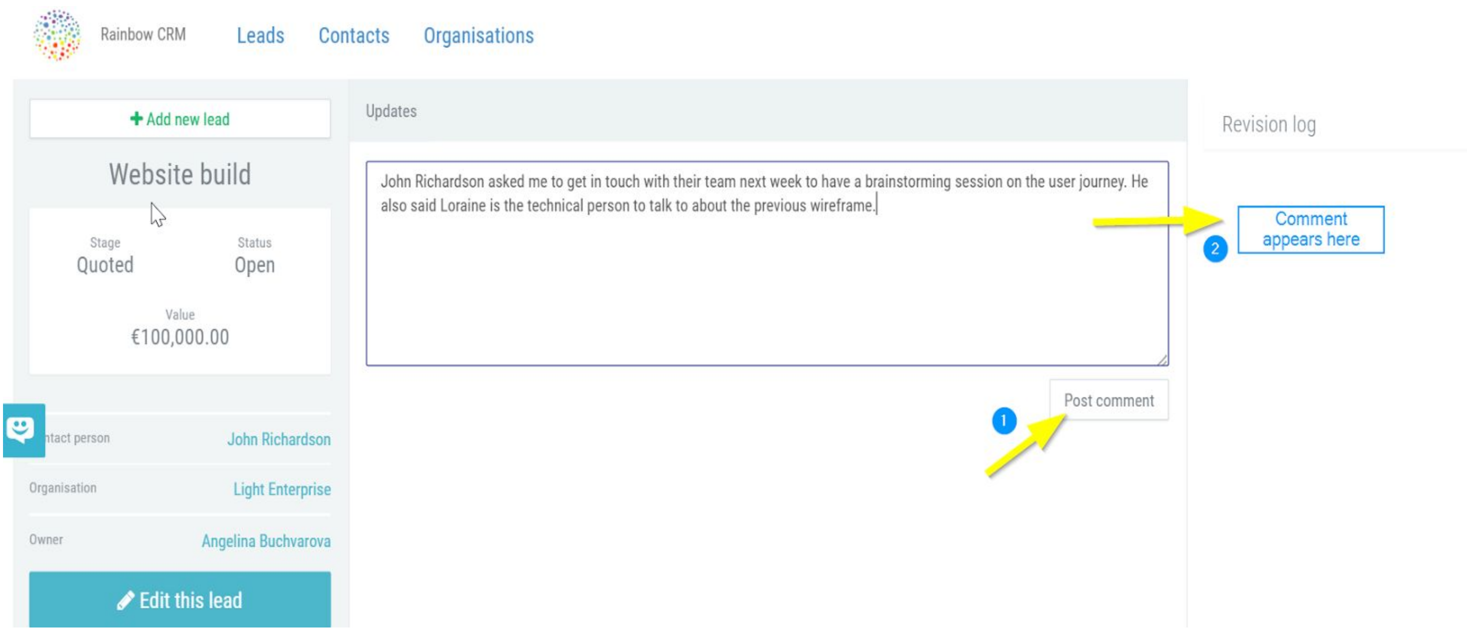


Adding a new lead

Put a title for your lead. Is it a logo creation, is it a new website build, mobile app or a partnership? Add the value of the project and choose a currency.
Input the organisation’s name. As you still have no organisations added, it will automatically save to your ‘Organisations’ tab. Same applies to ‘Contact person’.
Further down, mark the ‘Owner’ - who is responsible for this deal?
Use the dropdown menu.

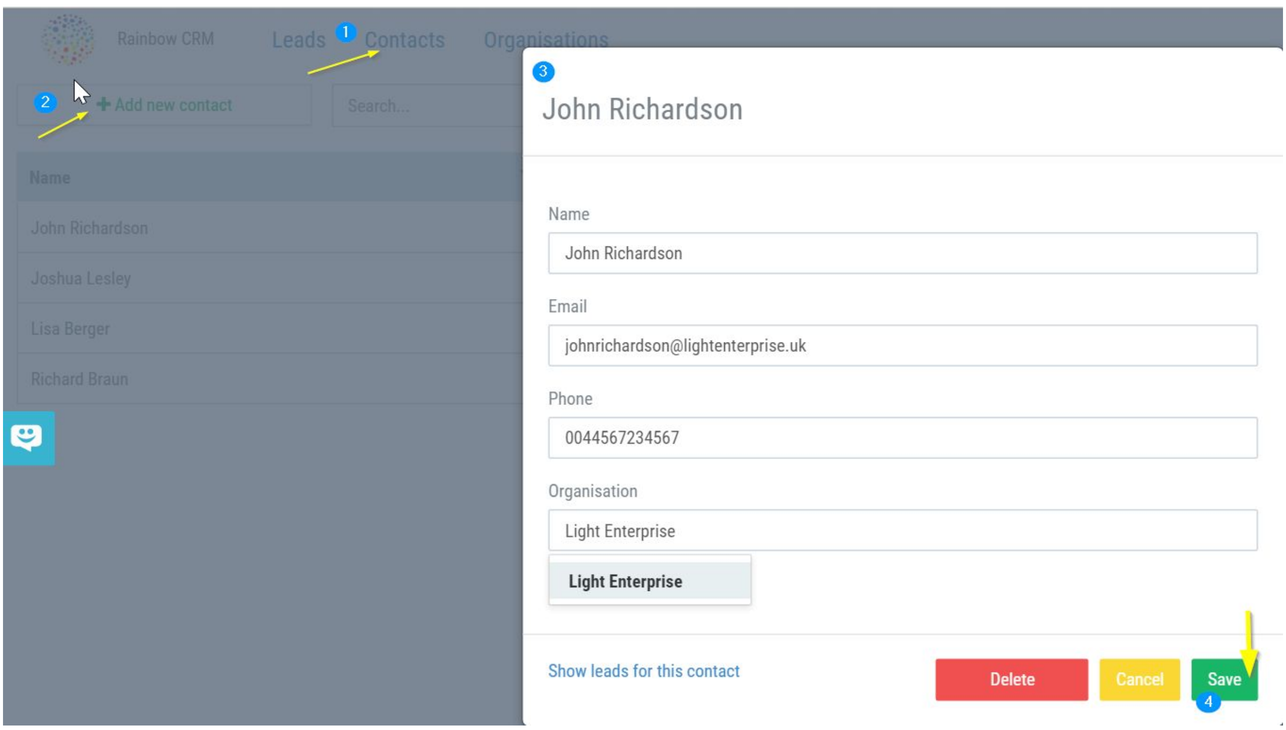
Select the stage of the lead - none, idea, contact or already quoted for?

Then mark the status of the project - open, won, lost or cancelled. Do not forget to save the information!



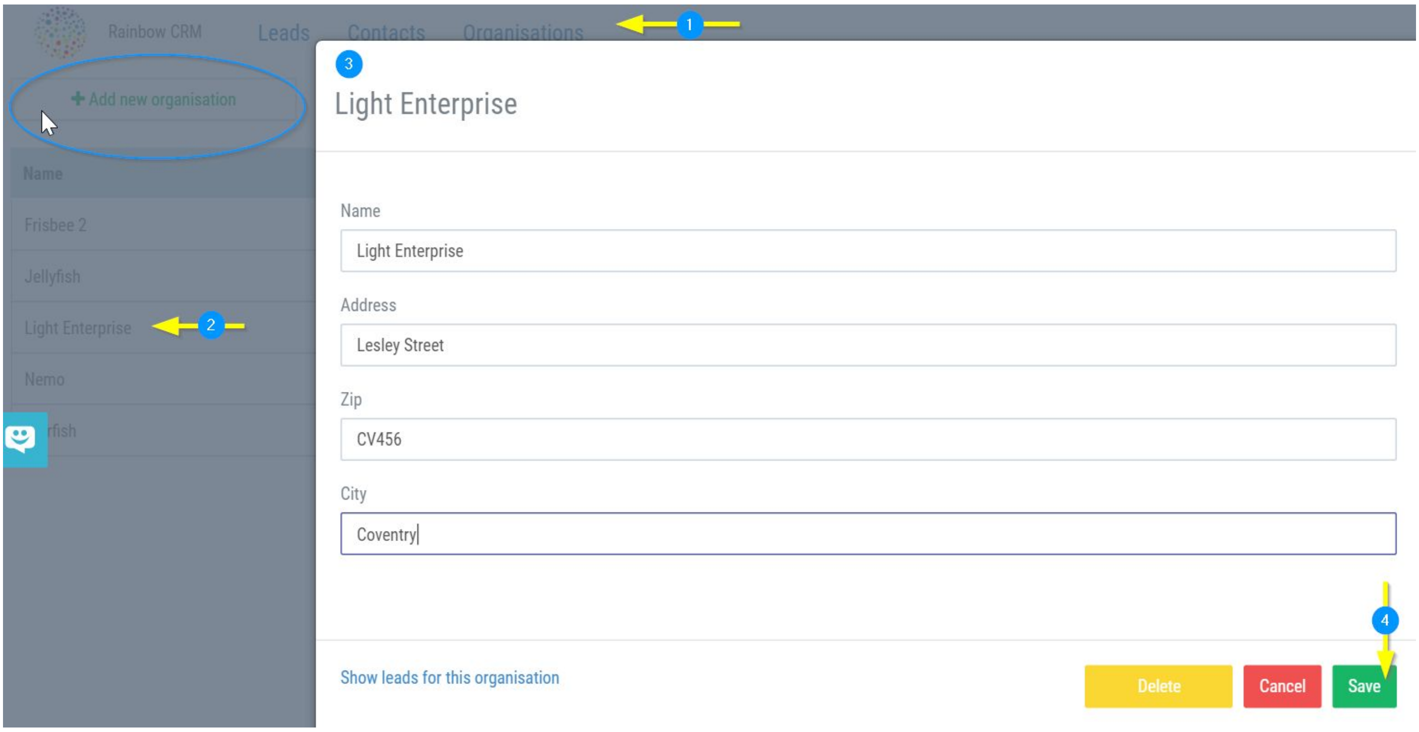
After you have saved the lead, it appears in a concise format on the left-hand side. You can then **write a comment**, advice, a tip or to-do in the comment section. **After posting it**, it will appear in the revision log. Thus you could monitor all the comments that relate to this lead.

Contacts



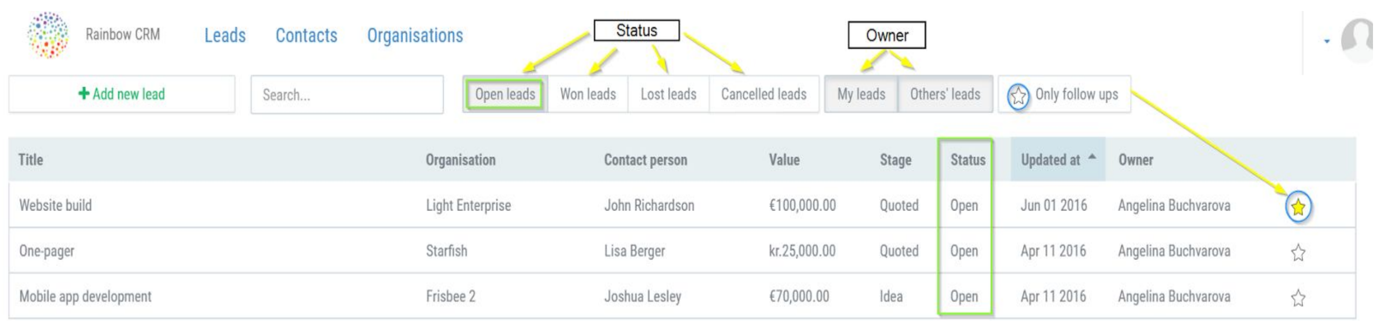
It is time to add some contact details for your first lead. **First** click on 'Contacts' from the main menu, **then** click on the 'Add new contact' button. The displayed **pop-up** will appear. Fill it in. The company has already been saved as an organisation, so it appears, as shown. **Save** the contact details of John Richardson and proceed to adding some details for the organisation he works for.

Organisations



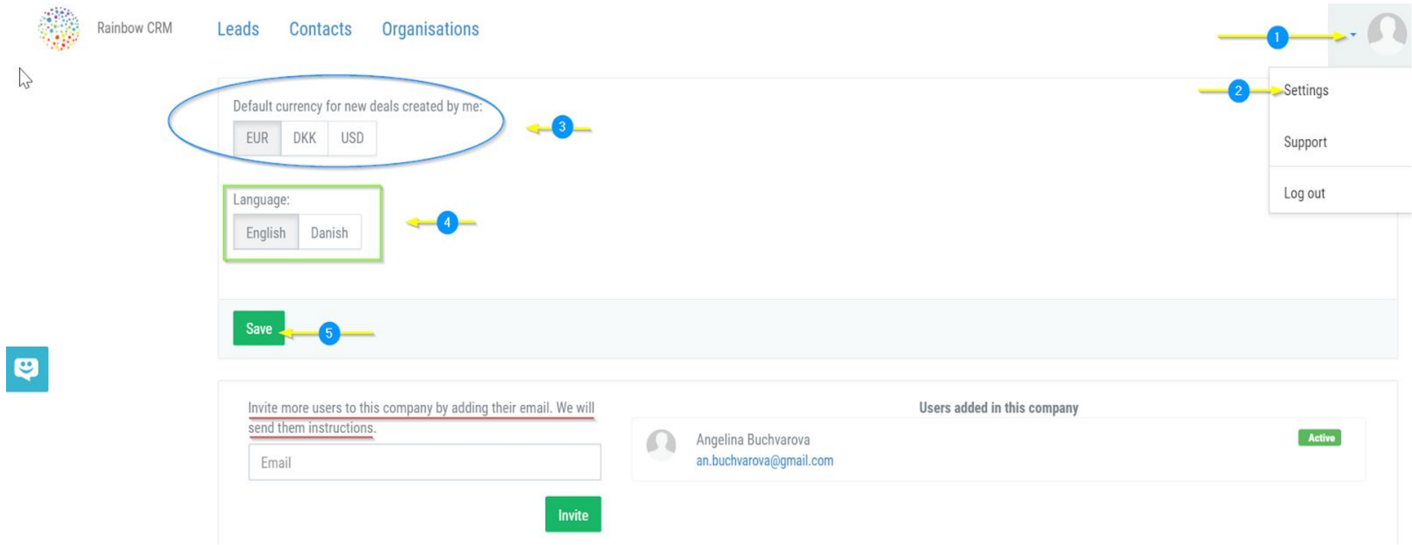
Click on 'Organisations' from the main navigation menu. **Then** click on the company you want to add details to. **A pop-up** will appear for you to fill in the requested information. After you have done this, **save it**! Whenever you need to add a new organisation, select the encircled button on the left-hand side. The same pop-up will open up.

Dashboard navigation



After you have added a couple of leads, you can filter them by status. Clicking on the 'Open leads' will display the leads that are open. Same goes for won, lost and cancelled leads. You can also filter the leads by owner, right next to the status tabs. The last star marks the leads that only require follow ups.Mark the star and it will go yellow.

Settings



Look at the upper right-hand side of the page, **click** on the drop-down menu and **select 'Settings'**. **Proceed** to choosing a default currency and language. **Save** your preferences. If you are the first user for Rainbow Agenda from your company, **do invite** more colleagues by writing their email in the box provided. If they register autonomously, they will de facto create other companies.

Now enjoy leads management with Rainbow CRM!