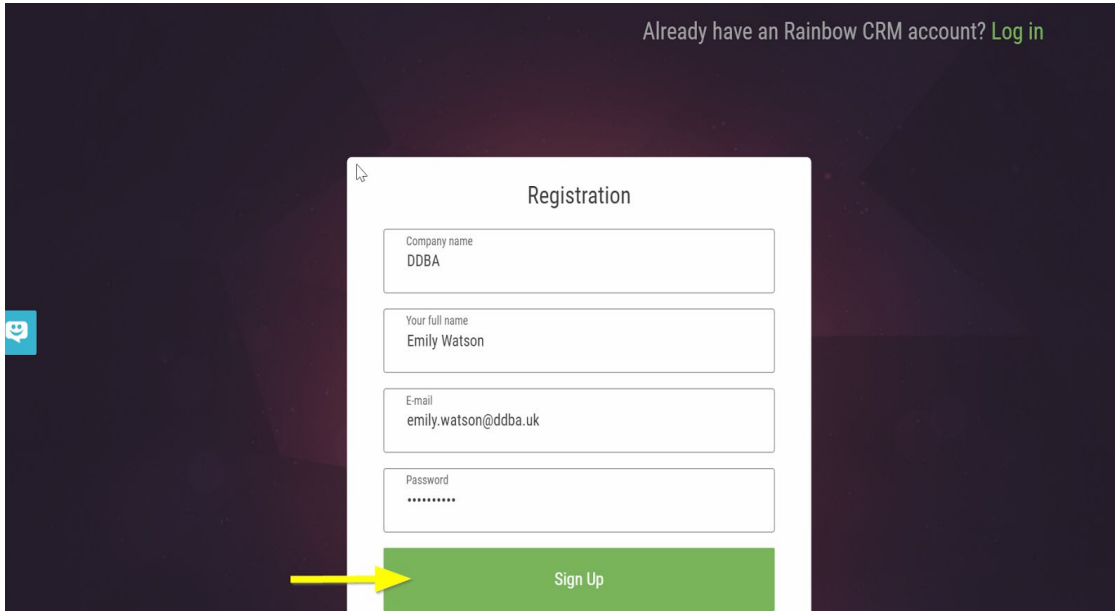


Welcome to our Rainbow CRM manual - the simple & effective CRM system. Let's start!

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".

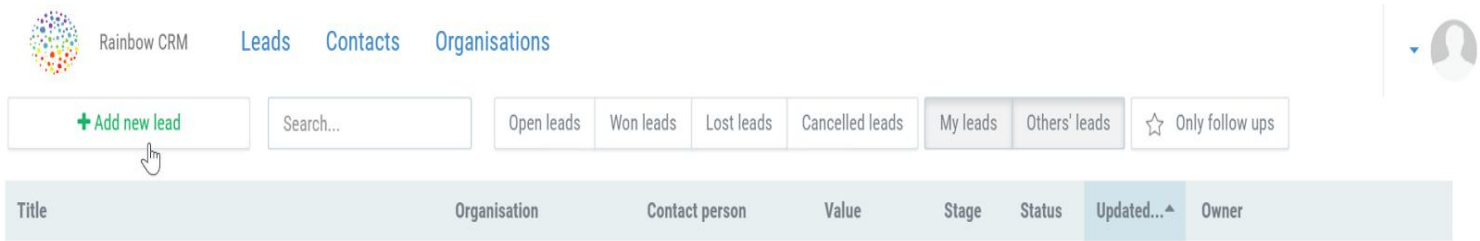
A screenshot of the Rainbow CRM registration form. The form is titled "Registration" and is set against a dark purple background. At the top right, there is a link that says "Already have an Rainbow CRM account? [Log in](#)". The form contains four input fields: "Company name" with the value "DDBA", "Your full name" with the value "Emily Watson", "E-mail" with the value "emily.watson@ddba.uk", and "Password" with masked characters "*****". Below these fields is a green "Sign Up" button. A yellow arrow points to the "Sign Up" button. On the left side of the form, there is a small blue chat icon.

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

A screenshot of the Rainbow CRM login form. The form is titled "Log in to Rainbow CRM" and is set against a white background. It contains two input fields: "E-mail" with the value "emily.watson@ddba.uk" and "Password" with masked characters "*****". To the right of the password field is a link that says "Forgot?". Below the password field is a checkbox labeled "Remember Me". At the bottom is a green "Log in" button. A yellow arrow points to the "Log in" button. The "Forgot?" link and the "Remember Me" checkbox are circled in blue.

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.

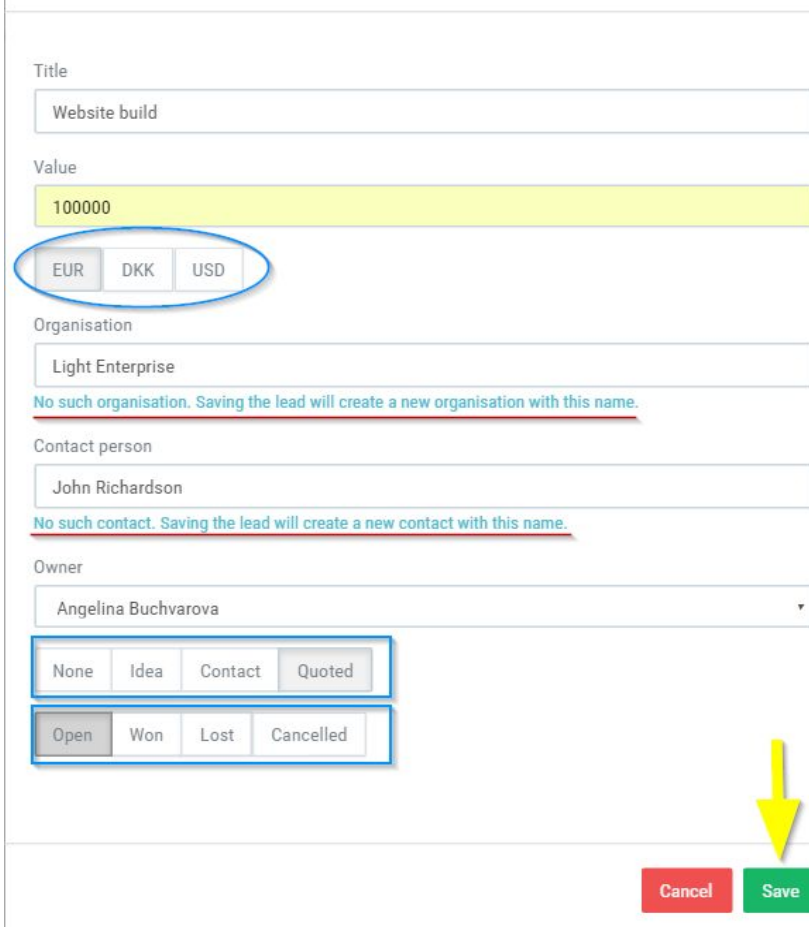
Add a new lead



The image shows the Rainbow CRM dashboard. At the top left is the Rainbow CRM logo. To its right are navigation links for 'Leads', 'Contacts', and 'Organisations'. On the far right is a user profile icon. Below the navigation links is a row of buttons: '+ Add new lead' (highlighted with a mouse cursor), 'Search...', and a set of filter buttons: 'Open leads', 'Won leads', 'Lost leads', 'Cancelled leads', 'My leads', 'Others' leads', and 'Only follow ups'. Below this is a table header with columns: 'Title', 'Organisation', 'Contact person', 'Value', 'Stage', 'Status', 'Updated...', and 'Owner'.

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.

Add new lead



The image shows the 'Add new lead' form. It has several input fields: 'Title' (with 'Website build' entered), 'Value' (with '100000' entered and a currency dropdown showing 'EUR', 'DKK', and 'USD'), 'Organisation' (with 'Light Enterprise' entered and a message 'No such organisation. Saving the lead will create a new organisation with this name.'), 'Contact person' (with 'John Richardson' entered and a message 'No such contact. Saving the lead will create a new contact with this name.'), and 'Owner' (with 'Angelina Buchvarova' selected in a dropdown). Below these fields are two rows of buttons: the first row has 'None', 'Idea', 'Contact', and 'Quoted'; the second row has 'Open', 'Won', 'Lost', and 'Cancelled'. At the bottom right are 'Cancel' and 'Save' buttons, with a yellow arrow pointing to the 'Save' button.

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!

The screenshot shows the Rainbow CRM interface with tabs for Leads, Contacts, and Organisations. On the left, a lead card for 'Website build' is displayed with details: Stage 'Quoted', Status 'Open', and Value '€100,000.00'. Below the card, contact information for John Richardson (Light Enterprise) and Angelina Buchvarova (Owner) is shown. The main area features an 'Updates' section with a comment from John Richardson. A yellow arrow labeled '1' points to the 'Post comment' button, and another yellow arrow labeled '2' points to the comment text area. A 'Revision log' section is visible on the right.

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

The screenshot shows the Rainbow CRM interface with the 'Contacts' tab selected. A yellow arrow labeled '1' points to the 'Contacts' tab, and another yellow arrow labeled '2' points to the '+ Add new contact' button. A pop-up form for 'John Richardson' is displayed, containing fields for Name, Email, Phone, and Organisation. The 'Organisation' field is pre-filled with 'Light Enterprise'. At the bottom of the form, there are buttons for 'Delete', 'Cancel', and 'Save'. A yellow arrow labeled '4' points to the 'Save' button. A 'Show leads for this contact' link is also visible.

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

1

2

3

4

Light Enterprise

Name

Light Enterprise

Address

Lesley Street

Zip

CV456

City

Coventry

Show leads for this organisation

Delete Cancel Save

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

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Settings

The screenshot shows the Rainbow CRM interface with the following elements and annotations:

- 1**: Points to the user profile icon in the top right corner.
- 2**: Points to the 'Settings' option in the dropdown menu.
- 3**: Points to the 'Default currency for new deals created by me:' section, which includes buttons for EUR, DKK, and USD.
- 4**: Points to the 'Language:' section, which includes buttons for English and Danish.
- 5**: Points to the 'Save' button at the bottom of the settings section.

Below the settings section, there is a section for inviting users:

Invite more users to this company by adding their email. We will send them instructions.

Email

Users added in this company

| Name | Email | Status |
|---------------------|-------------------------|--------|
| Angelina Buchvarova | an.buchvarova@gmail.com | Active |

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!