CRM Application User Guide

Welcome to the CRM! This guide will walk you through the main features of the application and how to use them based on your assigned role.

---

1. Getting Started

Logging In

To begin, navigate to the application's URL. You will be presented with the login page.

- **Standard Users**: Enter the email and password provided to you by your supervisor.
- **First-Time Admin Login**:
  1. Enter the email admin@example.com and any password (it will be ignored the first time).
  2. You will be redirected to a **Setup Page**.
  3. Create a new, secure password for the admin account.
  4. You will be sent back to the login page. Log in again with admin@example.com and your new password.

Main Interface

The main interface consists of two parts:

- **Sidebar Navigation** (Left): This menu contains links to all the main pages of the application. It can be collapsed or expanded by clicking the hamburger button (☰) in the top navigation bar.
- **Top Navigation Bar** (Top): This bar contains a **Role Switcher** (if applicable) and a **User Menu** for accessing your profile, settings, and logging out.

---

2. Core Features (by Role)

Your access to different features is determined by your user role.

All Users

Dashboard

The first page you see after logging in. It provides a high-level overview of your sales activities. The statistics shown are filtered based on your role (sales users see their own data; managers see team data).

- **Statistic Cards**: Clickable cards that show key numbers like "New Leads" or "Open Opportunities" and link directly to the relevant page.
- **Sales Chart**: A visual representation of sales performance.
- **Recent Activity**: A live feed of the most recent events, such as new leads created or deals won.

My Profile & Settings

Access these by clicking your name in the top-right corner.

- **Profile**: View your name and email, update your profile information, and change your own password.
- **Settings**: Manage your application preferences, such as toggling **Dark Mode**. Your choice is saved in your browser.

Sales & Telesales Users

Leads Page

This page allows you to manage potential customers.

- **View Leads**: You will only see leads that you own. The list can be searched, sorted by any column header, and paginated.
- **Add & Edit Leads**: Use the "Add New Lead" button or the "Edit" icon (✎) on a lead to open a form where you can enter details like name, company, status, and description.

The Lead Management Workflow

The goal of a lead is to qualify them and convert them into an active sales opportunity. Here is the step-by-step process:

1. Lead Creation
   A new lead enters the system, either manually via the "Add New Lead" button or from an external source like a web form. The lead is assigned to you and its status is "New".
2. Qualification
   You contact the lead to determine if they are a good fit for your products or services. You can use the "Edit" button to:
   - Add notes and details from your conversation to the **Description** field.
   - Update the **Status** to "Contacted" or "Qualified".
   - Update the **Lead Score** based on their level of interest.
3. Lead Conversion
   Once a lead is qualified and ready to be pursued as a serious sales opportunity, you convert it.
   - Click the **Convert** icon (噇) next to the qualified lead.
   - You will be prompted to enter a name and value for the new sales opportunity (the "Deal").
   - Upon confirmation, the system automatically performs three actions:
     1. A new **Customer** record is created using the lead's company name.
     2. A new **Deal** is created in the Sales Pipeline, linked to the new customer.
     3. The original lead's status is changed to **"Converted"**, and it is removed from your active lead list.
4. Next Steps
   The lead process is now complete. The opportunity is now managed as a Deal in the Sales Pipeline page, where you will track its progress through to a won or lost outcome.

Sales Pipeline

This is a visual, drag-and-drop board for managing your open deals.

- **Drag & Drop**: Move deal cards between columns (e.g., from "Qualifying" to "Proposal") to update their stage.
- **View Deal Details**: Click on any deal card to open a detailed modal window.
- **Manage Products in a Deal**: Inside the detail modal, you can link existing products from the catalog to the deal and update their quantities.
- **Request a New Product**: If a required product doesn't exist, use the "Request New Product" button to submit a request with specifications and attachments.
- **Create a Quote**: From the deal modal, click "Create Quote" to be taken directly to the quote creation page, pre-populated with the deal's information.

Customers

View a filterable and sortable list of customer accounts that you own. Click "View Details" to see a full 360-degree view of the customer, including their contacts, notes, and associated deals.

Tasks & Activities

View and manage your tasks. The page is organized into tabs for "Upcoming," "Overdue," and "Completed" tasks. You can mark a task as complete directly from the list.

Product Manager & Supervisor

Product Catalog

This page provides a full list of all company products.

- **CRUD Operations**: Users with these roles will see buttons to **Add, Edit, and Delete** products.
- **Attachment Management**: When editing a product, you can add or remove associated files like datasheets and marketing materials.

Product Requests

This page is only visible to Product Managers and Supervisors.

- **Review Requests**: View a list of all new product requests submitted by the sales team.
- **View Details**: Click "View Details" to open a modal showing the requested specifications and any attachments.
- **Approve & Convert**: Click "Approve & Convert to Product" to open the "Add New Product" form, pre-populated with the information from the request, ready for you to finalize and add to the catalog.

Supervisor Role

User Management

This page is only visible to supervisors.

- **Full CRUD Operations**: Create new user accounts, edit existing users' roles and statuses, and delete users.
- **Reset Password**: From the "Edit User" modal, a supervisor can securely set a new password for any user account.
- **Full Data Visibility**: Supervisors have access to all data across the entire application, including all leads, deals, and customers, regardless of the owner.