NovaCRM™ – FAQ & Troubleshooting Guide

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1. General Questions

Q1: What is NovaCRM™?

NovaCRM™ is a cloud-based Customer Relationship Management platform for managing sales, contacts, leads, and business communications in a unified interface.

Q2: How often is NovaCRM™ updated?

System updates are automatically deployed twice a month. Users are notified 24 hours before a major release.

Q3: Is my data secure?

Yes. NovaCRM™ uses AES-256 encryption for data storage and TLS 1.3 for data transmission. Backups occur daily across redundant cloud regions.

Q4: Can multiple users work on the same account?

Yes. Multiple users can collaborate on the same company or deal record with role-based permissions.

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2. Account & Access

Q1: I forgot my password. What should I do?

- Click **"Forgot Password?"** on the login screen.
- Enter your registered email address.
- Follow the reset link sent to your inbox.

Q2: I'm not receiving the password reset email.

Check your **Spam** or **Promotions** folder. If not found, contact **support@novasoft.io** to verify your account status.

Q3: My account is locked.

Accounts lock after **5 failed login attempts**. Wait 15 minutes or request manual unlock from an administrator.

Q4: How do I change my email address?

- Navigate to **Profile → Account Settings**
- Click **Edit Email**
- Verify the new email through confirmation link

Q5: Can I have multiple user roles?

No. Each user can hold only one role at a time (Admin, Sales Manager, or Sales Rep). You can request a role change from your Admin.

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3. Contacts and Leads

Q1: I can't find a contact I just added.

- Ensure the contact wasn't added under another user's account.
- Check the **filters** applied in the Contacts view.
- Search by **email address** instead of name to confirm existence.

Q2: Imported contacts are showing incorrect fields.

This happens when column headers in your CSV file don't match NovaCRM™ fields. Use the **Import Template** under **Contacts → Import → Download Template** before re-uploading.

Q3: How do I merge duplicate contacts?

1. Select both contact records.
2. Click **Merge** on the toolbar.
3. Choose which details to retain.
4. Confirm the merge.

Q4: Why can't I convert a lead to a contact?

- Lead must be in **Qualified** stage.
- Ensure all required contact fields (email, phone) are filled.

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4. Dashboard & Reports

Q1: My dashboard is blank after login.

- Ensure widgets are enabled under **Customize Dashboard**.
- Check if filters are hiding data (date range or user assignment).
- Clear browser cache and refresh the page.

Q2: Reports are showing outdated data.

Reports refresh every **4 hours** by default. Admins can trigger a manual refresh under **Analytics → Refresh Data**.

Q3: Can I schedule reports to be emailed automatically?

Yes. Go to **Analytics → Scheduled Reports** and choose:

- Frequency (daily, weekly, monthly)
- Recipients (comma-separated emails)
- Format (CSV, PDF, XLSX)

Q4: Exported CSV files contain strange characters.

Ensure your system uses **UTF-8 encoding** when opening the file. In Excel, use **Data → Get External Data → From Text (UTF-8)**.

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5. Integrations

Q1: How do I connect my Gmail or Outlook account?

- Navigate to **Settings → Integrations → Email**.
- Choose Gmail or Outlook.
- Sign in using your credentials and grant permission.

Q2: My calendar is not syncing.

- Go to **Settings → Integrations → Calendar**.
- Ensure sync is enabled.
- Reconnect your account if token expired.
- Check time zone settings under **Profile → Preferences**.

Q3: Zapier automation stopped working.

- Check if your API key has changed.
- Ensure your Zapier trigger (NovaCRM app) is still active.
- Reconnect integration and re-publish Zap.

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6. Data Import & Export

Q1: What file formats are supported for import?

NovaCRM™ supports **.CSV** and **.XLSX** formats for contact, lead, and deal imports.

Q2: The import wizard fails midway.

Possible causes:

- Incorrect column mapping
- Missing required fields (Name, Email)
- File size exceeds 25MB

Solution: Split the file into smaller parts and retry.

Q3: How can I export only specific records?

- Apply filters (date range, owner, status).
- Click **Export Filtered Data** at top right.

Q4: Can I schedule automatic exports?

Yes, Admins can set automatic exports to cloud storage (Google Drive, OneDrive) under **Settings → Data Management → Scheduled Exports**.

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7. Email & Communication

Q1: Emails sent from NovaCRM™ aren't showing in "Sent" folder.

This happens when **IMAP sync** is disabled. Enable it under **Settings → Email → Sync Settings**.

Q2: Email templates aren't displaying dynamic fields.

Ensure merge tags use correct format: `{{FirstName}}`, `{{CompanyName}}`, etc. Click **Preview** before sending to confirm placeholders.

Q3: Email bounces are increasing.

- Verify email list accuracy.
- Avoid sending bulk emails from personal accounts.
- Contact support for **SMTP reputation check** if bounce rate exceeds 10%.

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8. Mobile App

Q1: Is NovaCRM™ available on mobile?

Yes, NovaCRM™ is available on both **iOS** and **Android**. Search for "NovaCRM" in your app store.

Q2: I can't log in from the mobile app.

- Check internet connectivity.
- Verify same credentials as web version.
- Update to the latest app version.

Q3: Data on mobile app is outdated.

- Tap **Sync Now** in the app settings.
- Enable **Auto Sync** for background data updates.

9. Performance & System Errors

Q1: Pages are loading slowly.

Possible reasons:

- Browser cache overload
- Low internet speed
- Large datasets on dashboard

Fix:

- Clear cache
- Reduce active widgets
- Use filters to narrow data scope

Q2: "500 Internal Server Error" appears.

This is a temporary server issue. Try refreshing after 2–3 minutes. If issue persists, contact **support@novasoft.io** with timestamp and screenshot.

Q3: The app keeps logging me out automatically.

Sessions expire after **60 minutes of inactivity**. Adjust auto-logout settings under **Profile →
Security Preferences**.

Q4: My browser says "Mixed Content Warning."

Ensure all custom links or images embedded in notes or templates use **HTTPS** URLs.

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10. Technical Support Information

Support Channels:

- Email: **support@novasoft.io**
- Phone: **+1 (800) 555-0199**
- Live Chat: Available inside the web app under **Help → Chat Support**
- Knowledge Base: https://help.novacrm.io

Operating Hours: Monday–Friday: 8:00 AM – 6:00 PM (EST) Response time: < 4 business
hours

Escalation Process:

1. Tier 1 – Basic troubleshooting
2. Tier 2 – Technical escalation
3. Tier 3 – Engineering-level analysis

Appendix: Error Codes Reference

Error Code	Description	Recommended Action
ERR-101	Invalid credentials	Reset password
ERR-204	Record not found	Verify ID or search filters
ERR-305	Import mapping failed	Review field mapping
ERR-409	Duplicate record conflict	Merge or delete duplicate
ERR-502	Network timeout	Retry after 1 minute
ERR-700	Integration token expired	Reconnect integration

Document History

Version	Date	Author	Description
1.0	Jan 2025	NovaSoft Docs Team	Initial FAQ & Troubleshooting Release