User Manual – NovaCRM™

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Author: NovaSoft Solutions, Inc.

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1. Introduction

NovaCRM™ is a cloud-based Customer Relationship Management (CRM) platform designed to help businesses organize, track, and grow customer relationships. It centralizes all customer data and provides tools for sales, marketing, and service teams to collaborate efficiently.

Key Features:

- Contact and lead management
- Automated sales pipeline tracking
- Email integration and templates
- Reporting and analytics dashboards
- Role-based access control
- API for third-party integrations

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2. System Requirements

Supported Browsers:

- Google Chrome (latest version)
- Microsoft Edge (latest version)
- Safari 15 or later
- Mozilla Firefox (latest version)

Recommended Hardware:

- Processor: Intel i5 or equivalent
- RAM: 8GB or higher
- Internet Connection: Minimum 5 Mbps
- Display: 1280x720 resolution or higher

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3. Getting Started

3.1 Logging In

1. Navigate to: `https://app.novacrm.io/login`
2. Enter your **email address** and **password**.
3. Click **Sign In**.
4. If you are a new user, click **Register** to create an account.

3.2 Password Recovery

- Click **Forgot Password?**
- Enter your registered email.
- Follow the link in your email to reset your password.

3.3 User Roles

- **Admin:** Full access to all modules and settings.
- **Sales Manager:** Can view team dashboards, manage leads, and assign tasks.
- **Sales Representative:** Can manage assigned leads, contacts, and tasks.

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4. Dashboard Overview

The dashboard provides a summary of your CRM activity.

Widgets include:

- **Total Leads** – Number of active leads in the system
- **Conversion Rate** – Percentage of leads converted to deals
- **Upcoming Tasks** – Scheduled activities for the next 7 days
- **Revenue Overview** – Graphical representation of monthly sales

Users can customize widgets using the **“Customize Dashboard”** button at the top-right corner.

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5. Managing Contacts

5.1 Adding a New Contact

1. Navigate to **Contacts** → **New Contact**.
2. Fill in required fields (Name, Email, Phone, Company).
3. Click **Save Contact**.

5.2 Importing Contacts

- Go to **Contacts** → **Import** → **Upload CSV File**.
- Match CSV columns to CRM fields.
- Click **Import Now**.

5.3 Searching Contacts

Use the **global search bar** at the top of the interface or apply **filters** by industry, status, or creation date.

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6. Managing Leads

6.1 Creating Leads

- Click **Leads** → **Add Lead**.
- Input lead details such as Source, Budget, and Owner.
- Save to the lead database.

6.2 Lead Stages

- **New** → **Contacted** → **Qualified** → **Proposal** → **Won/Lost**

Leads automatically update status as actions are logged.

6.3 Lead Scoring

Each lead receives a score (0–100) based on engagement metrics such as:

- Email opens
- Call logs
- Form submissions

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7. Sales Pipeline

The **Pipeline** visualizes the progress of leads through sales stages.

Features:

- **Drag-and-drop** interface for moving leads between stages
- Real-time value calculation per stage
- Forecasting view for quarterly revenue

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8. Task & Activity Management

Tasks are linked to contacts, leads, or deals.

8.1 Creating a Task

1. Navigate to **Tasks** → **New Task**.
2. Set title, due date, and assign to user.
3. Click **Save**.

8.2 Types of Activities

- Calls
- Meetings
- Follow-up emails
- Notes

All activities sync automatically with the user's calendar if integration is enabled.

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9. Reports and Analytics

9.1 Accessing Reports

Go to **Analytics** → **Reports** to view predefined or custom reports.

Predefined Reports Include:

- Lead Conversion Summary
- Sales by Representative
- Revenue by Product Line
- Lost Deal Analysis

9.2 Exporting Data

Reports can be exported as:

- **CSV**
- **PDF**
- **Excel (.xlsx)**

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10. System Settings

Accessible only to **Administrators**.

10.1 User Management

- Add or remove users
- Assign roles and permissions

10.2 Integrations

Available integrations include:

- **Gmail / Outlook** (email sync)
- **Google Calendar / Microsoft Calendar**
- **Slack**
- **Zapier**

10.3 Custom Fields

Admins can add custom fields to contact or lead forms to capture business-specific data.

11. Troubleshooting

Issue	Possible Cause	Solution
Unable to log in	Incorrect password	Reset via “Forgot Password”
Missing dashboard data	Filters applied	Clear filters and refresh
Import errors	Wrong file format	Ensure CSV follows template
Email sync fails	Integration not authorized	Reconnect under Settings → Integrations

12. Support and Contact Information

For assistance, contact **NovaCRM™ Support**:

- **Email:** support@novasoft.io
- **Phone:** +1 (800) 555-0199
- **Knowledge Base:** help.novacrm.io

Support hours: **Mon–Fri, 8:00 AM – 6:00 PM (EST)**

Document History

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1.0	Jan 2025	NovaSoft Docs Team	Initial release