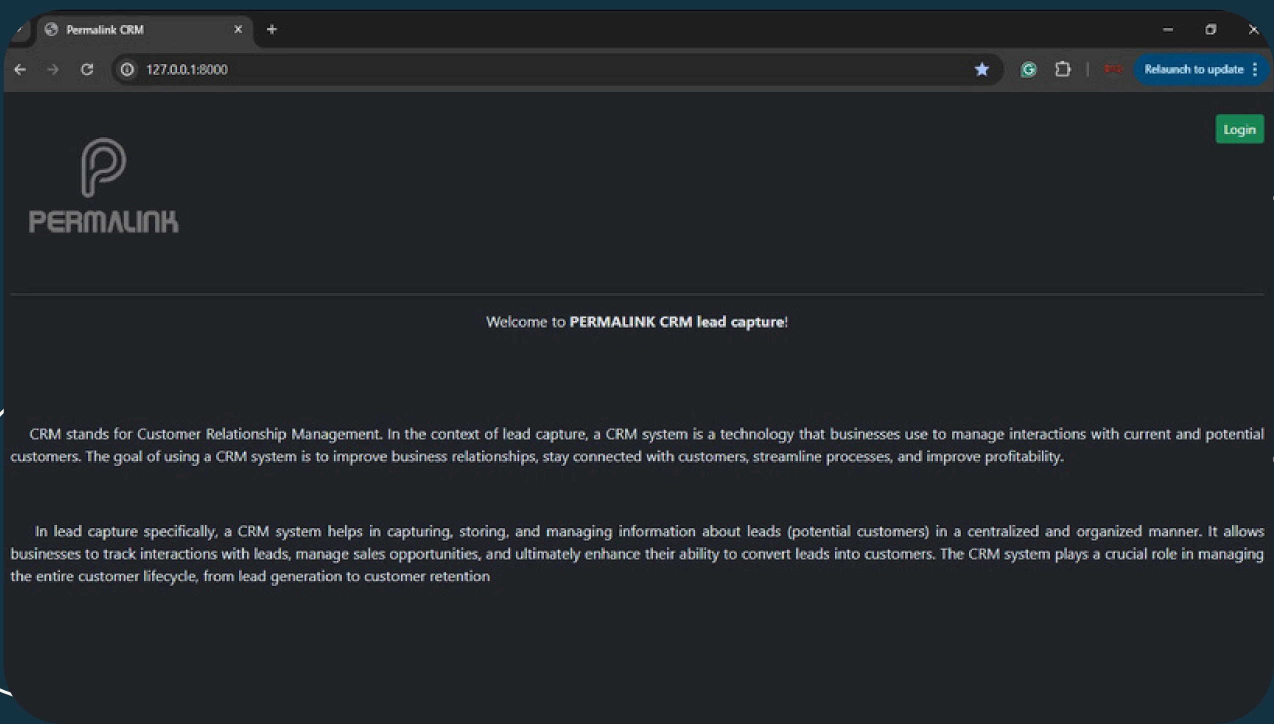
Used Manual

PERMALINK CRM

Customer Relationship Management application



Nemanja Velicki

Introduction

Welcome to the CRM project!
This powerful Customer Relationship Management (CRM) application is designed to streamline lead management, helping businesses efficiently capture, organize, and track potential customers.
This is a powerful Django-based CRM project designed for efficient lead management. With user-friendly interfaces.

contents

LOGGING

Logging : Overview

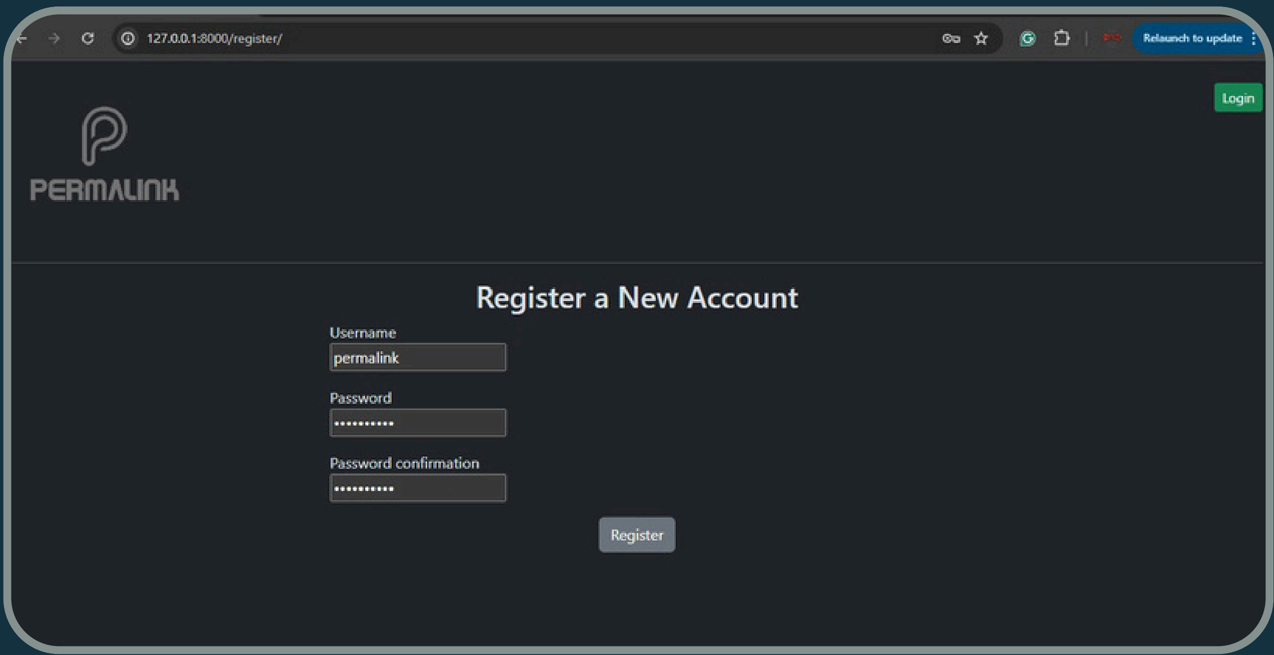
To use Permalink CRM, please ensure you are logged in with your Username and Password. If you haven't registered yet, please visit the Registration Page to create your account.

After capturing leads or when finished with your session, remember to log out to protect your information and ensure security

Logging : Register new user

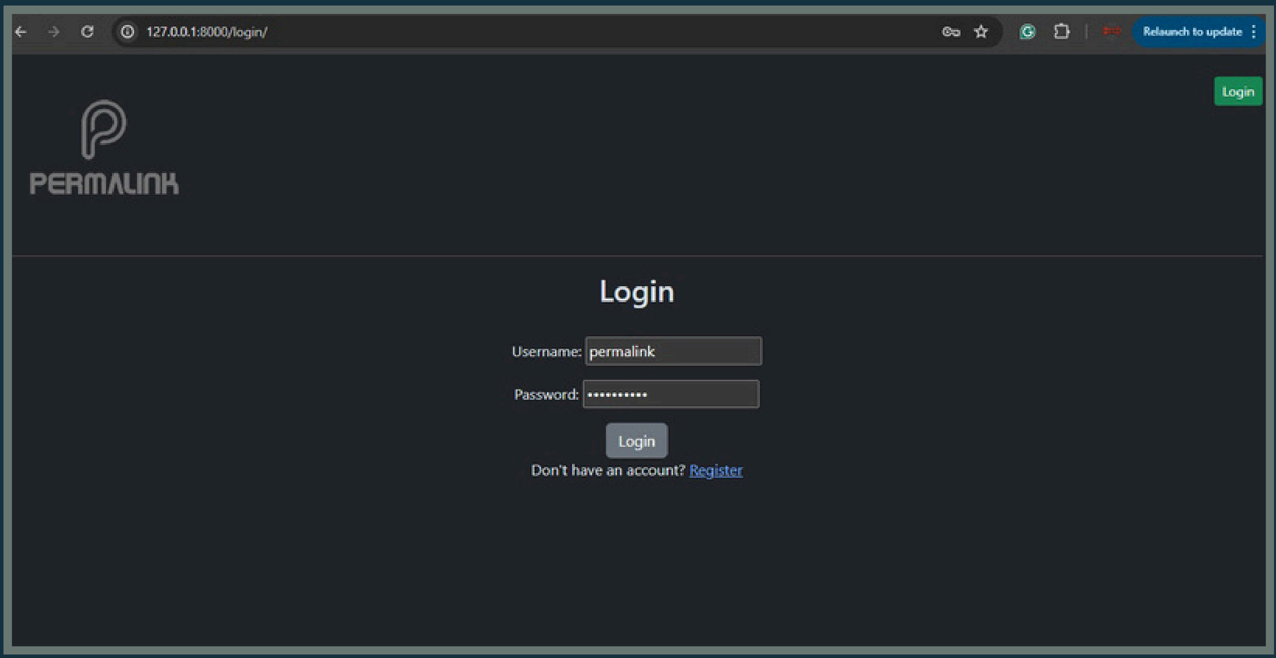
To register a new user, start by visiting the Login page. You can access the Login page by clicking the 'Login' button in the upper right corner of the screen. Once on the Login page, below the Username and Password fields, you'll find a link labeled 'Register.' Click on this link to navigate to the Registration page.

Registering a new user is simple – you just need to fill out all three fields: Username, Password, and Password confirmation. Make sure your password meets the specified requirements for security.



Logging : Login

After registering and obtaining your Username and Password, logging in is a breeze. Simply click the 'Login' button located in the upper right corner of the screen. Once on the Login page, enter your Username and Password into the designated fields and click the 'Login' button. Rest assured, your login credentials are securely handled to protect your information.



Logging : Logout

When you're done using the CRM, it's important to log out from your account to ensure the security of your information. Logging out is simple – just click the 'Logout' button located in the upper right corner of the screen.

Thank you for prioritizing the security of your account with Permalink CRM!

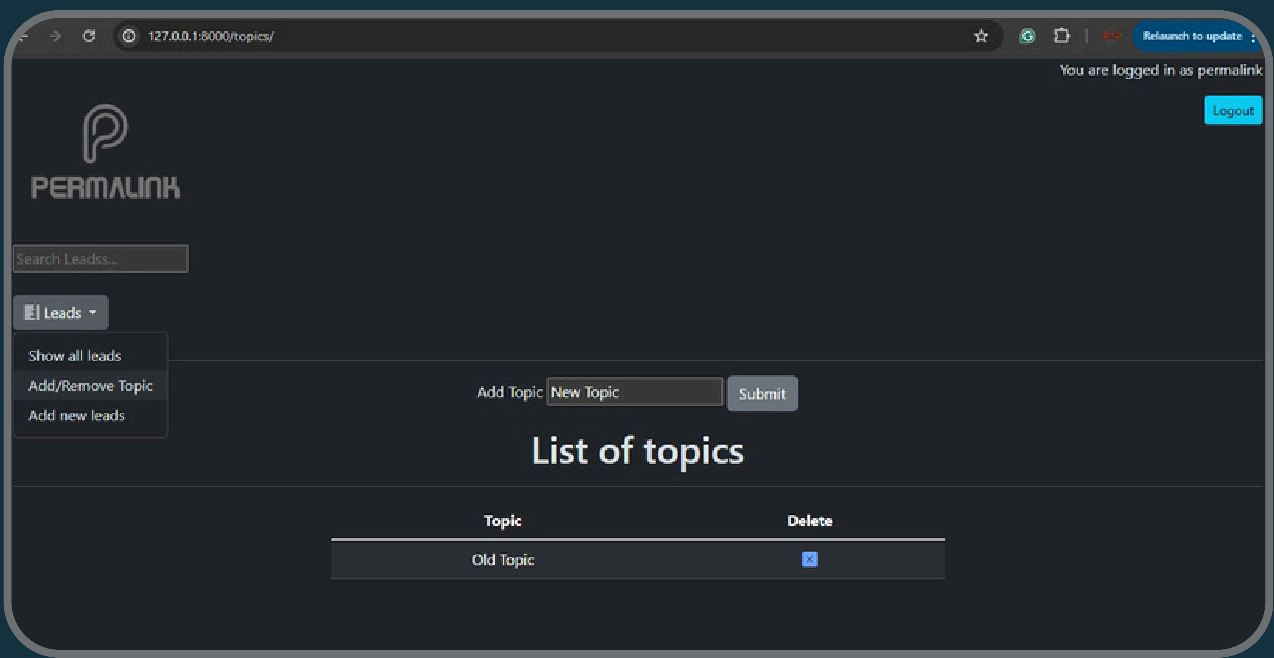
LEAD MANAGEMENT

Lead Management : Add/Remove Topic

To add leads in Permalink CRM, two required fields must be filled out: Name and Topic. Before adding leads, ensure you have created relevant topics. To do so, click on the dropdown button labeled 'Leads', and from the dropdown list, select 'Add/Remove Topic'. In the topic page, in the provided field enter the name of the topic you wish to add. After typing the topic name, click the 'Submit' button to save the new topic.

Below the 'Add Topic' field, you'll find a list of existing topics. To remove a topic, simply click the 'X' sign next to its name. Remember, any deletion in Permalink CRM follows a two-step process to prevent accidental deletions.

It's IMPORTANT to note that deleting a topic will also delete all leads associated with that topic, as leads must be categorized under a topic. Topics play a crucial role in organizing and managing your leads effectively.

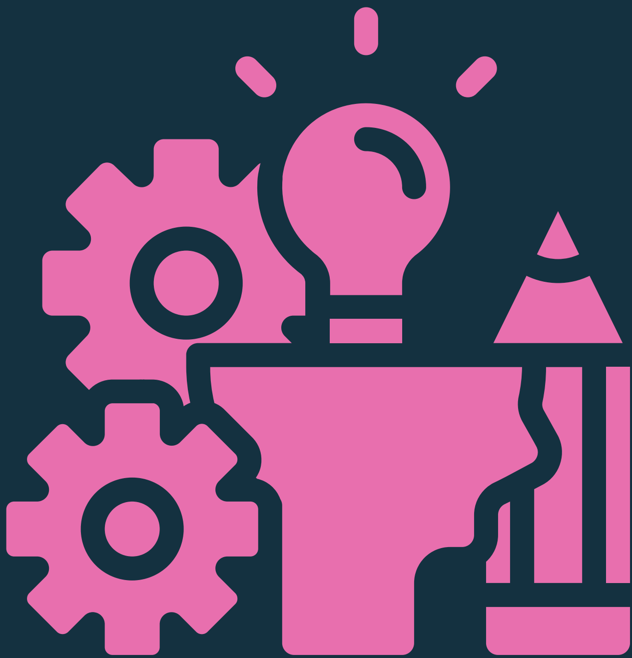


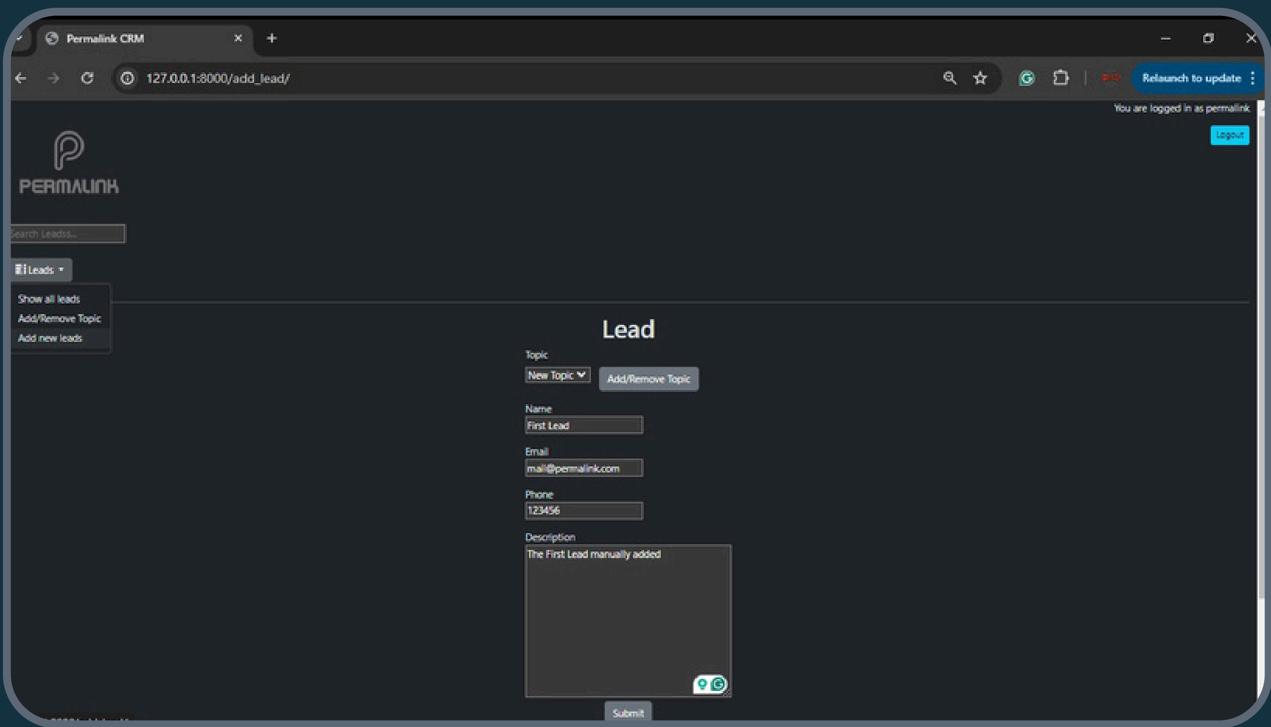
Lead Management : Add new Leads
Manually add Leads

To manually add leads, follow these steps:

1. Click on the dropdown button labeled 'Leads'.
2. From the dropdown list, select 'Add new Leads'.
3. On the 'Add new Leads' page, you'll need to pick a Topic from the dropdown list and fill in the required fields.
   - The Topic and Name fields are mandatory.
   - Additionally, you can fill in the email, phone, and description fields.
4. After entering the desired information, click on the 'Submit' button to add the leads to the list.

Ensure all required fields are filled in before submitting to avoid any errors.





Lead Management : Add new Leads
Add Leads by uploading a CSV file

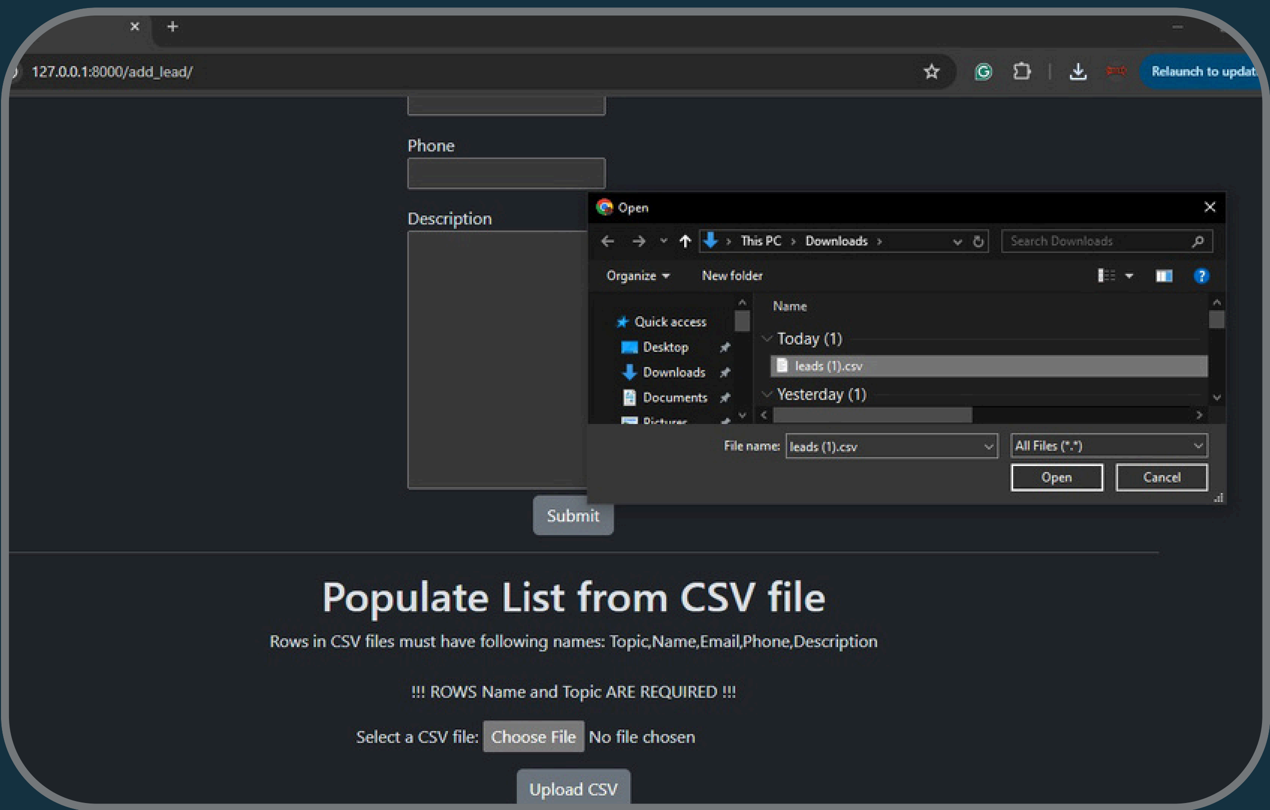
To add leads by uploading a CSV file, follow these steps:

1. Click on the dropdown button labeled 'Leads' in the navigation bar.
2. From the dropdown list, select 'Add new Leads'.

Scroll down to the end of the page, and you will find the 'Populate List from CSV file' section. To upload a CSV file from your computer, click the 'Choose file' button. After selecting the CSV file, click on the 'Upload CSV' button, and your Leads list will be populated from your chosen file.

Please ensure that your CSV file follows these guidelines:

- Rows in CSV files must have the following names: Topic, Name, Email, Phone, Description.
- The 'Name' and 'Topic' fields are required.
- If there are any errors in the CSV file format or data, you may encounter issues during the upload process.



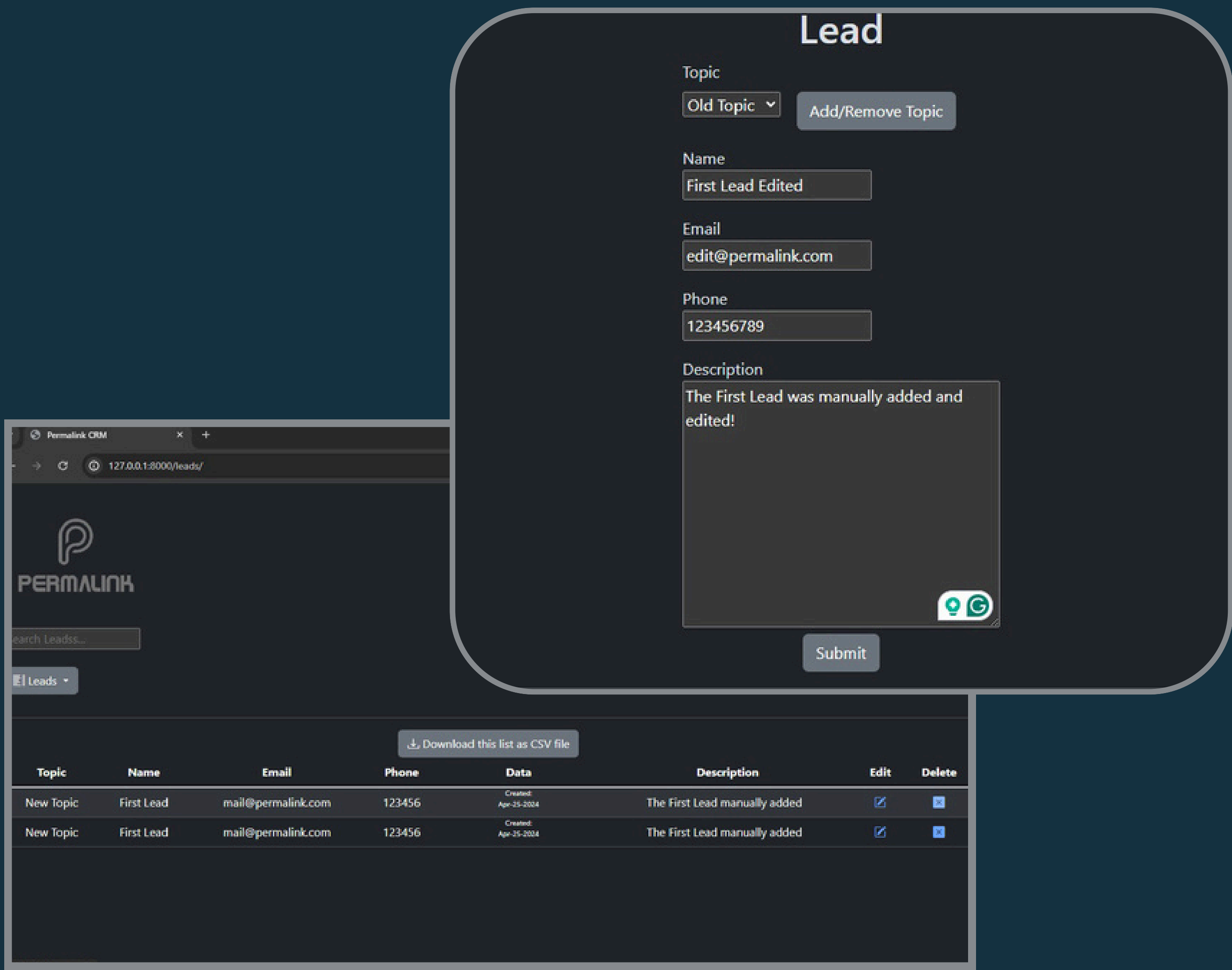
Lead Management : Edit and Delete Leads

To edit or delete leads, follow these steps:

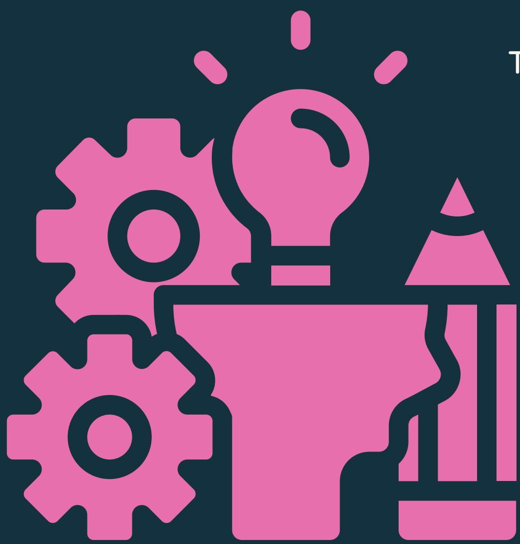
1. Click on the dropdown button labeled 'Leads'.
2. From the dropdown list, select 'Show all Leads'.

To delete a lead, simply click the 'X' sign at the end of the row, and confirm the deletion when prompted. Remember, any deletion in Permalink CRM follows a two-step process to prevent accidental deletions.

To edit a lead, click the 'Edit' sign button (placed before the 'X' sign). The edit leads page looks the same as the 'Add Leads' page, with prefilled fields containing the existing lead information. Simply edit the fields you want to change and click the 'Submit' button to save the changes.

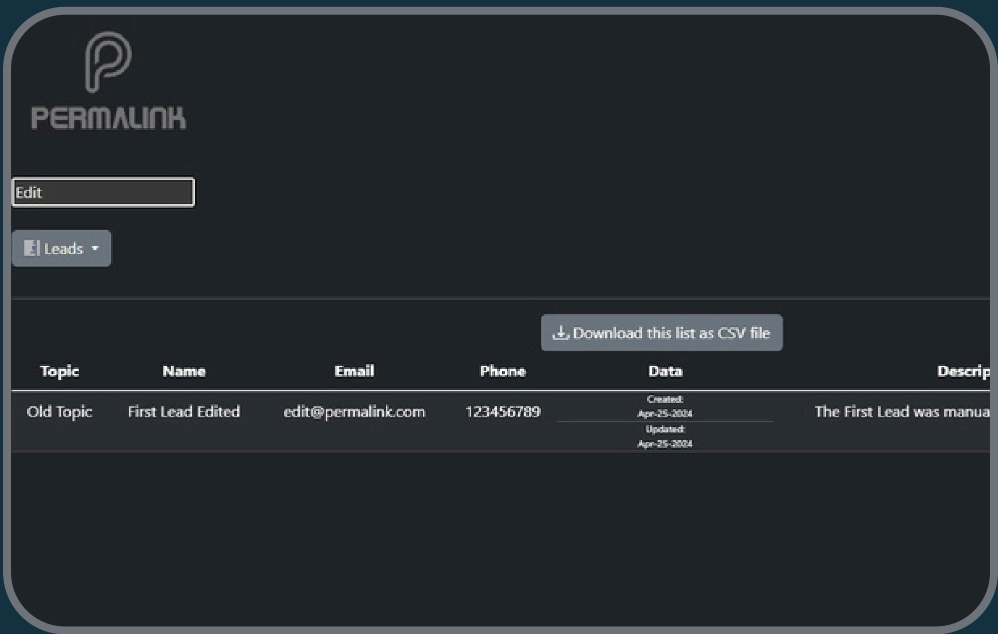


Lead Management : Search Leads



To search for leads, follow these steps:

1. Locate the search bar beneath the PERMALINK logo.
2. Enter your search query (e.g., topic, lead name, phone number, email, or description).
3. Press 'Enter'. The search engine will then look through topics, lead names, phone numbers, emails, and descriptions, and provide you with a list of results.



Lead Management : Download the Leads list as a CSV file

If you want to download the list of leads to your computer as a CSV file, follow these steps:

1. Click on the 'Download this list as CSV file' button.
2. The list of leads will then be downloaded to your computer as a CSV file.

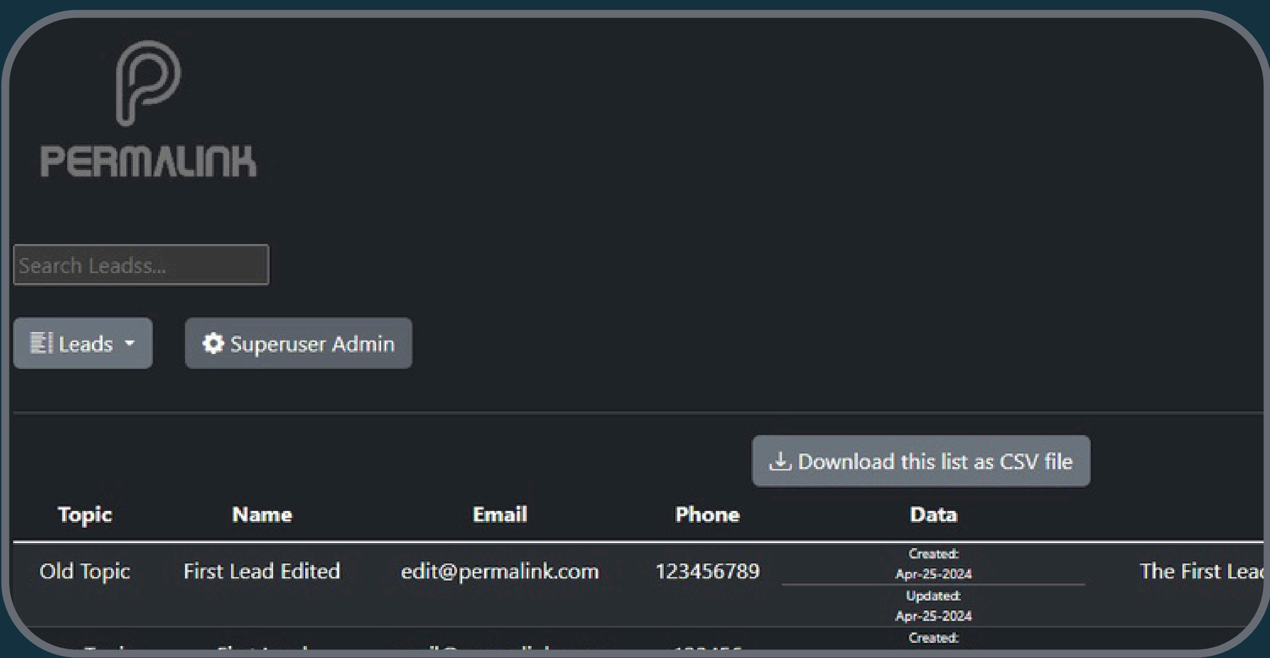
SUPERUSER ADMIN

Superuser Admin : Overview

Access to the 'superuser admin' panel is restricted to superusers only. If you're a superuser, you'll find an additional button labeled 'Superuser Admin' next to the dropdown button called 'Leads.'

Inside the Superuser Admin panel, you'll find various tools and statistics:

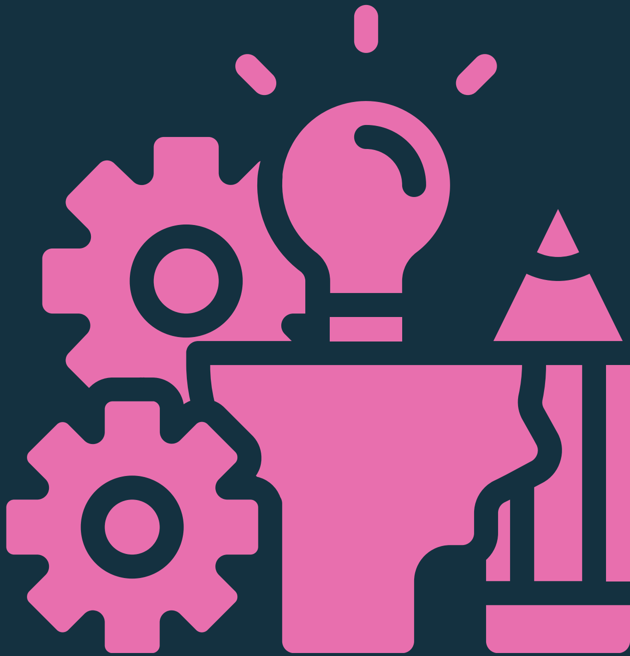
- Home Page: Edit Homepage text
- Statistics: View statistics on the total number of topics, leads, and users with accounts.
- User Management: See a list of all users along with the number of topics and leads each user has. From here, you can grant or revoke superuser status, as well as delete users. Note that only users who are not superusers can be deleted.
- Data Management: Inspect a list of topics and leads for each user. You can delete specific leads or topics belonging to a user. However, it's important to understand that deleting a user will also delete all associated data. Similarly, deleting a topic will delete all leads associated with that topic.

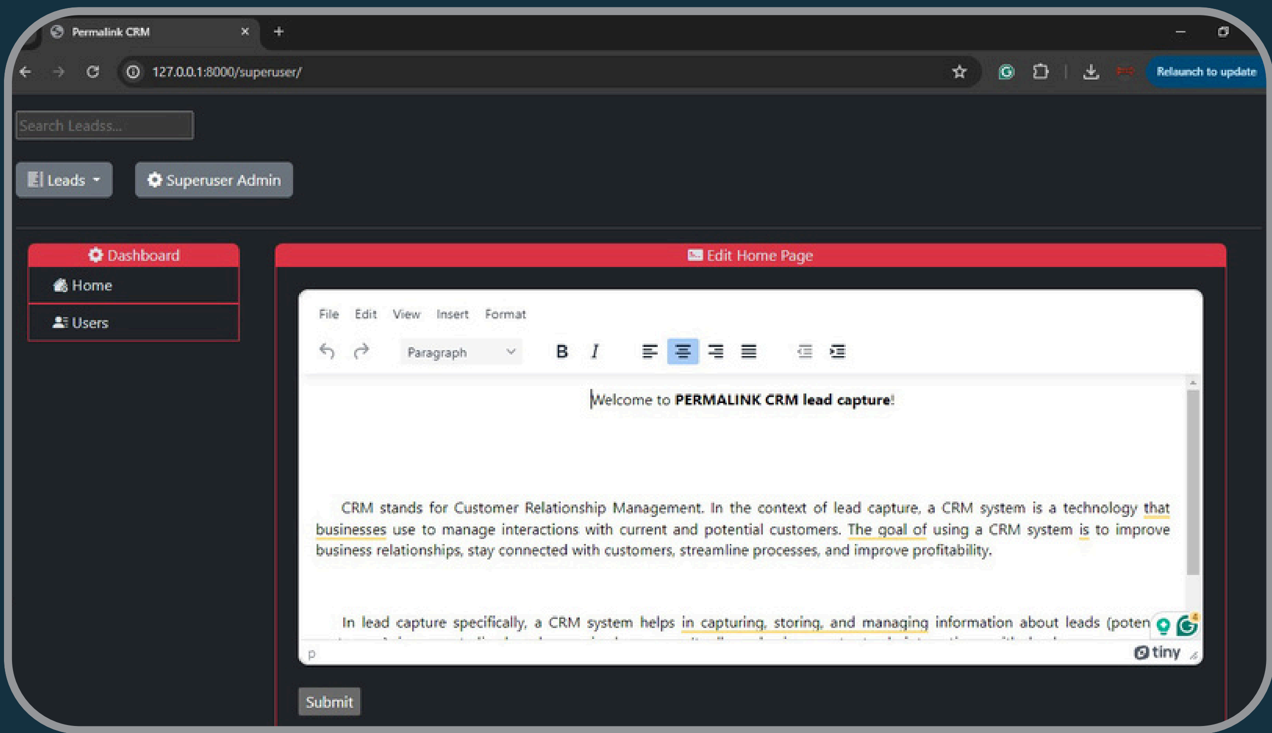


Superuser Admin : Edit Homepage text

When you navigate to the superuser admin panel page by clicking the additional button labeled 'Superuser Admin' next to the dropdown button called 'Leads', you will see a prefilled text editor. Here, you can edit the text for the home page of the CRM.

After finishing editing the text, simply click the 'Submit' button, and all changes you make will be saved and shown on the home page.





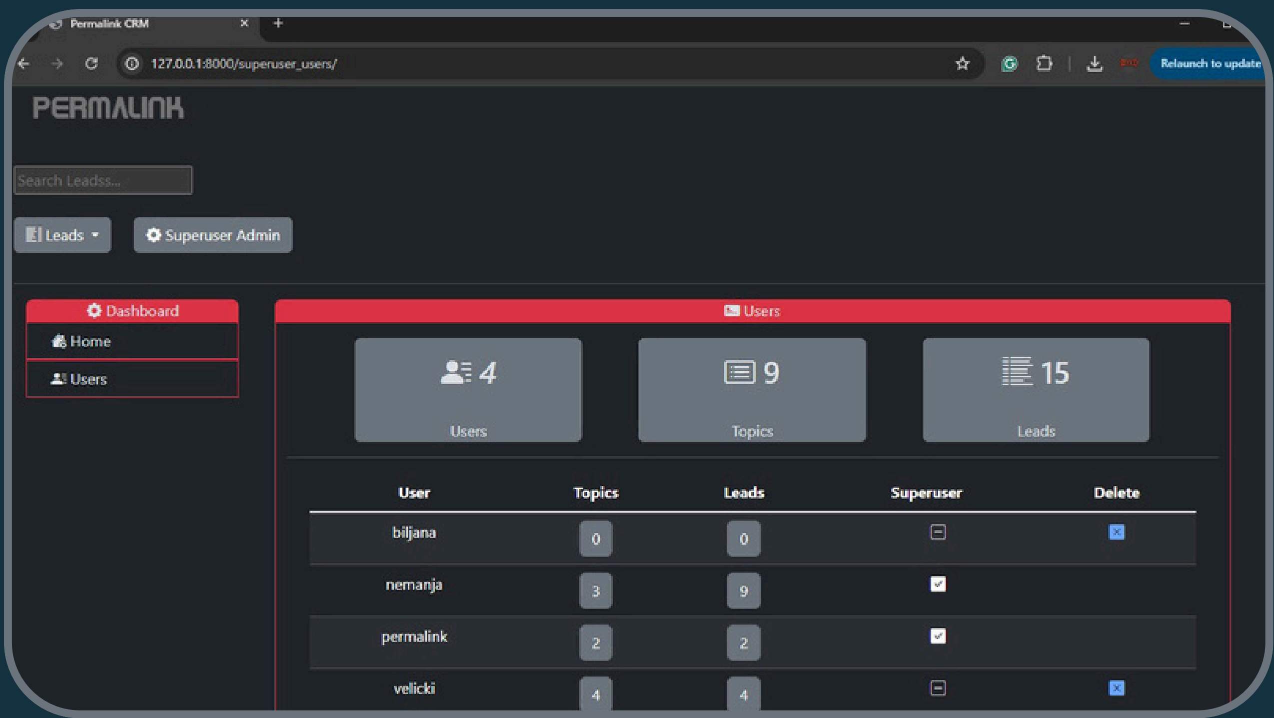
Superuser Admin : User Management panel

When you navigate to the superuser admin panel page by clicking the additional button labeled 'Superuser Admin' next to the dropdown button called 'Leads', you can access the User Management panel by clicking the 'Users' button located inside the Dashboard panel.

On the User Management page, you will find the following:

- Statistics: View statistics on the total number of users with accounts, topics, and leads.
- User List: Below the statistics, you'll see a list of all users. Each user entry displays the number of topics and leads they have, indicates whether they are superusers, and provides an 'X' button for deleting the user and all associated data.

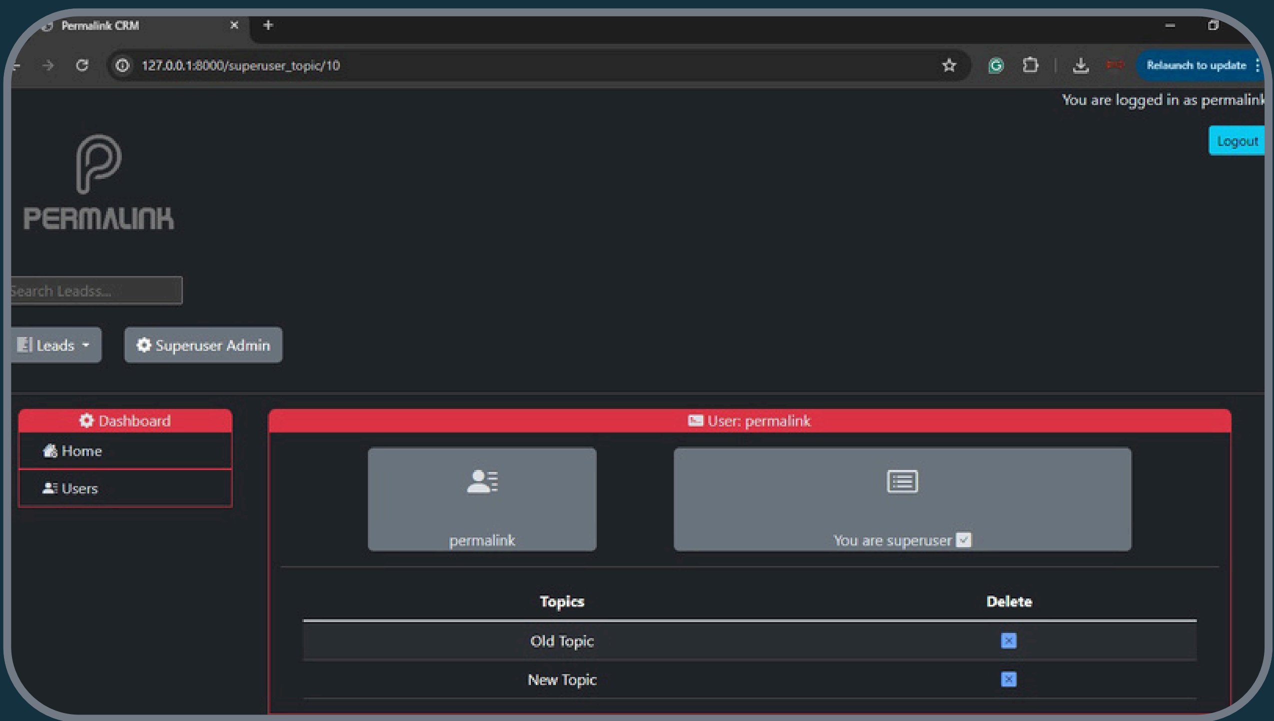
Remember, any deletion in Permalink CRM follows a two-step process to prevent accidental deletions.



Superuser Admin : User Management panel
Managing Users Topics

To manage user topics, follow these steps:

1. Navigate to the Superuser User Management Panel as described in the previous section.
2. In the list of users, click on the number of topics for the user you wish to manage. This will open the page for managing the topics of that user.
3. Above the list of topics, you will see information about the user, including their name and superuser status. You can change the superuser status by checking or unchecking the superuser checkbox and clicking the save button.
4. Below the user information, you'll find a list of topics that the user has. You can delete any topic by clicking the 'X' button next to the topic name.
   - Deleting a topic will also delete leads associated with that topic.
   - Remember, any deletion in Permalink CRM follows a two-step process to prevent accidental deletions.

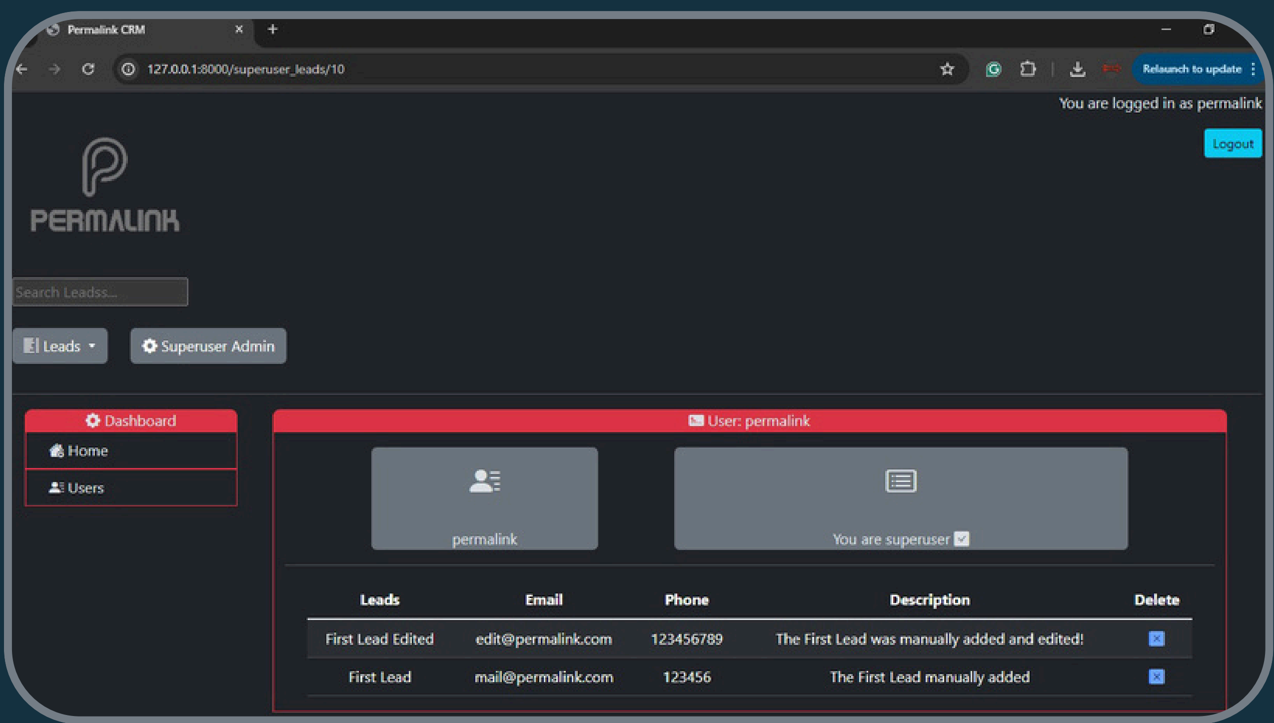


Superuser Admin : User Management panel
Managing Users Leads

To manage user leads, follow these steps:

1. Navigate to the Superuser User Management Panel as described in the 'Superuser Admin: User Management Panel' section.
2. In the list of users, click on the number of leads for the user you wish to manage. This will open the page for managing the leads of that user.
3. Above the list of leads, you will see information about the user, including their name and superuser status. You can change the superuser status by checking or unchecking the superuser checkbox and clicking the save button to apply changes.
4. Below the user information, you'll find a list of leads that the user has. You can delete any lead by clicking the 'X' button next to the lead name you want to delete.

Remember, any deletion in Permalink CRM follows a two-step process to prevent accidental deletions.



API

API : Overview

The Permalink CRM API provides developers with powerful tools to integrate external systems and automate workflows. With the API, users can access and manipulate CRM data programmatically, enabling seamless interaction with Permalink CRM from external applications or platforms.

Key features of the Permalink CRM API include:

1. Data Access: Retrieve, create, update, and delete CRM data such as leads and topics.
2. Authentication: Secure access to the API using token-based authentication, ensuring data privacy and integrity.
3. Customization: Customize CRM functionality by building custom endpoints and integrating with third-party services.
4. Documentation: Comprehensive documentation and developer resources make it easy to get started with the API and build powerful integrations.

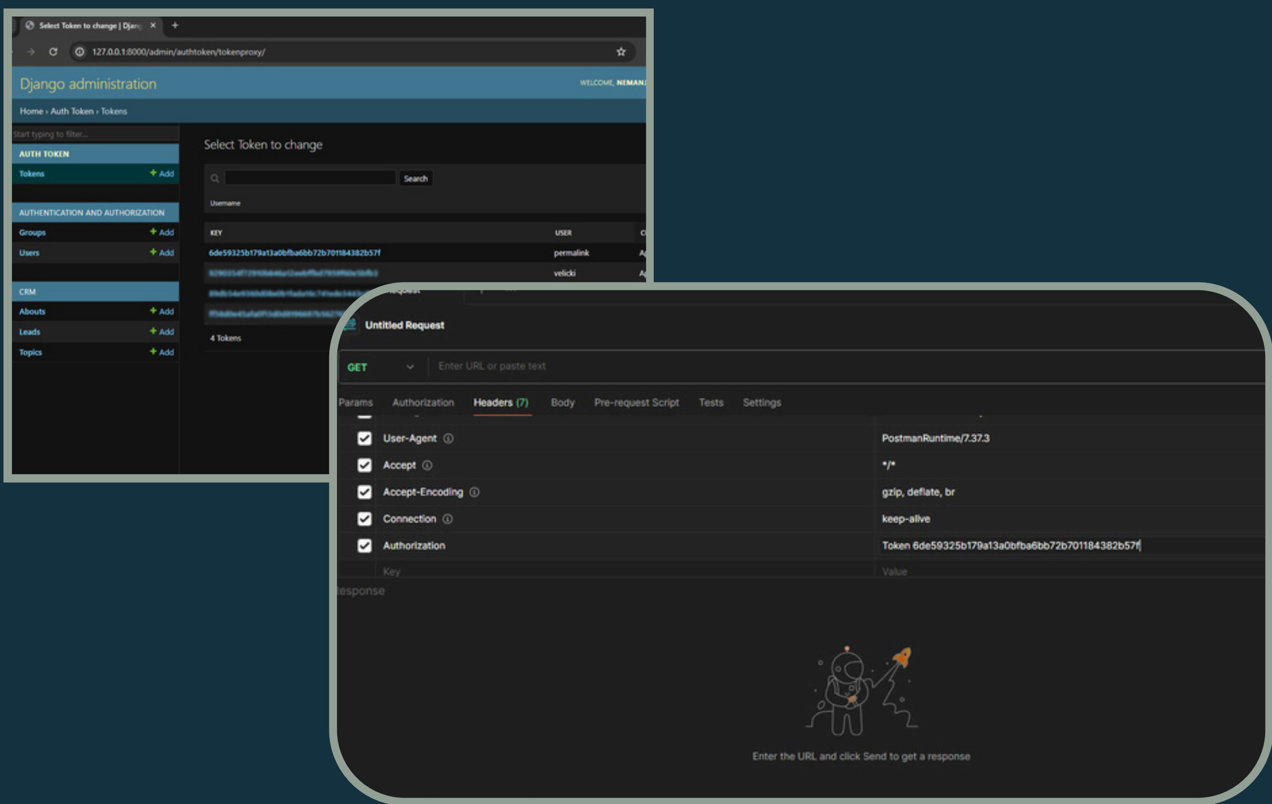
Whether you're integrating with existing systems, automating tasks, or building custom applications, the Permalink CRM API empowers developers to extend the capabilities of the CRM platform and enhance productivity.

API : Configuration

Here's a brief guide on configuring Postman for further use with the Authorization Token key:

1. Obtain Token Key: Visit the Django admin page of your Permalink CRM website ([websiteURL]/admin) and log in with superuser credentials. From there, locate your Authorization Token key.
2. Open Postman: Launch the Postman application.
3. Navigate to Headers Tab: In Postman, locate the Headers tab for your request.
4. Add Authorization Header: Click on the Headers tab, and then click on the "Add Header" button. Enter the following details:
   - Key: Authorization
   - Value: Token [Token key paste here]
5. Replace [Token key paste here] with your actual Authorization Token key obtained from the Django admin page.
6. Save Configuration: Once you've added the Authorization header with the Token key, make sure to save your Postman configuration for future use.

By following these steps, you'll configure Postman to include the necessary Authorization Token key in your requests for accessing the Permalink CRM API



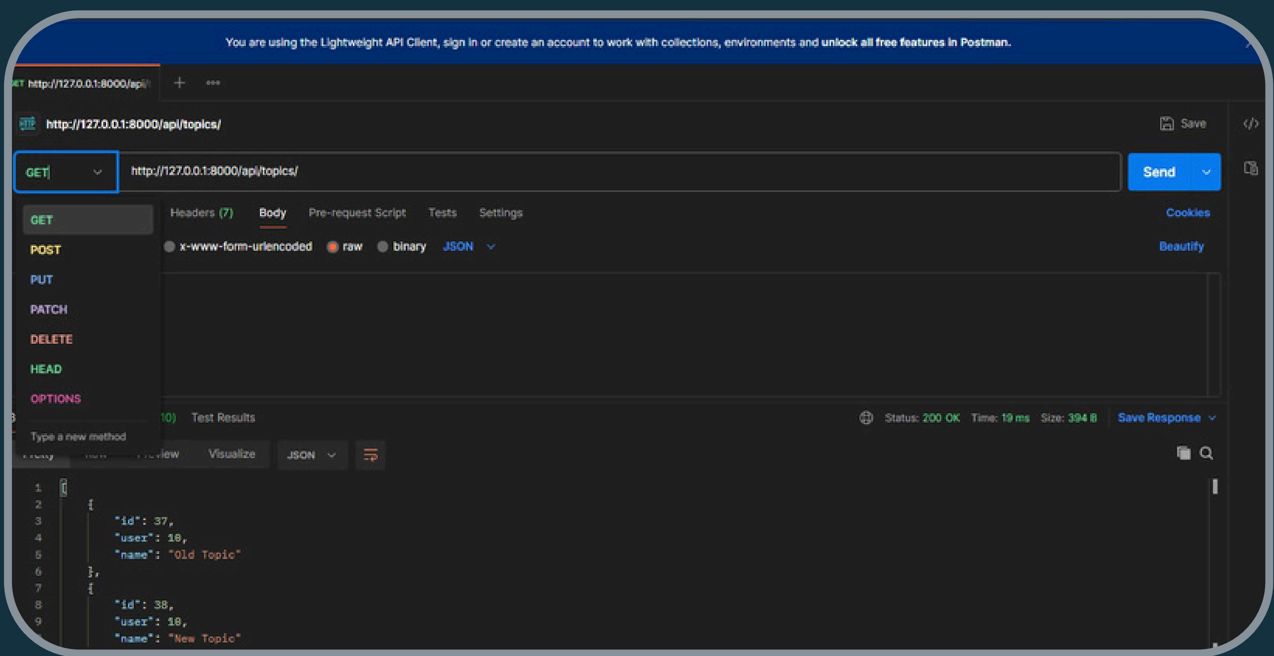
API : GET, POST, PUT and DELETE

GET

To retrieve data from PERMALINK CRM using Postman, you'll need to utilize the GET method. This guide will walk you through four different scenarios for retrieving data.

1. Get All Topics:
   - Enter [websiteURL]/api/topics/ in the Postman URL bar.
   - Click the 'Send' button.
   - Postman will retrieve and print all topics in JSON format.
2. Get Specific Topic:
   - Enter [websiteURL]/api/topics/[ID of topic] in the Postman URL bar, replacing [ID of topic] with the actual ID of the topic you want to retrieve.
   - Click the 'Send' button.
   - Postman will retrieve and print the specific topic in JSON format.
3. Get All Leads:
   - Enter [websiteURL]/api/leads/ in the Postman URL bar.
   - Click the 'Send' button.
   - Postman will retrieve and print all leads in JSON format.
4. Get Specific Lead:
   - Enter [websiteURL]/api/leads/[ID of lead] in the Postman URL bar, replacing [ID of lead] with the actual ID of the lead you want to retrieve.
   - Click the 'Send' button.
   - Postman will retrieve and print the specific lead in JSON format.

Retrieving data from PERMALINK CRM using Postman is straightforward and can be done using the GET method. By following these simple steps, you can efficiently retrieve the data you need for your CRM integration or analysis purposes.



API : GET, POST, PUT and DELETE

POST

To add new topics or leads to PERMALINK CRM using Postman, you'll need to use the POST method. Follow the steps below for each:

1. POST New Topic:

- Open Postman and select the POST method from the dropdown button.
- In the URL bar, enter [websiteURL]/api/topics/, replacing [websiteURL] with the actual URL of your PERMALINK CRM.
- Switch to the Body tab in Postman.
- Write the following JSON code in the Body tab, replacing [here write the name of Topic] with the name of the new topic:

```
{
   "name": "[here write the name of Topic]"
}
```

- Click the 'Send' button to save the new topic.

2. POST New Lead:

- Open Postman and select the POST method from the dropdown button.
- In the URL bar, enter [websiteURL]/api/leads/, replacing [websiteURL] with the actual URL of your PERMALINK CRM.
- Switch to the Body tab in Postman.
- Write the following JSON code in the Body tab, replacing placeholders with actual data:

```
{
   "topic": [here write ID of topic],
   "name": "[here write name of new lead]",
   "email": "[here write email of new lead]",
   "phone": "[here write phone number of new lead]",
   "description": "[here write description of new lead]"
}
```

- Click the 'Send' button to save the new lead.

By following these steps, you can easily add new topics and leads to PERMALINK CRM using Postman.

API : GET, POST, PUT and DELETE

PUT

To update topics or leads in PERMALINK CRM using Postman, follow these steps:

1. PUT Update Topic:

- Open Postman and select the PUT method from the dropdown button.
- In the URL bar, enter [websiteURL]/api/topics/[ID of topic you want to update], replacing [websiteURL] with the actual URL of your PERMALINK CRM and [ID of topic you want to update] with the actual Topic ID you want to update.
- Switch to the Body tab in Postman.
- Write the following JSON code in the Body tab, replacing [here write the name of Topic] with the new name for the topic:

```
{
  "name": "[here write the name of Topic]"
}
```

- Click the 'Send' button to update the topic.

2. PUT Update Lead:

- Open Postman and select the PUT method from the dropdown button.
- In the URL bar, enter [websiteURL]/api/leads/[ID of lead you want to update], replacing [websiteURL] with the actual URL of your PERMALINK CRM and [ID of lead you want to update] with the actual Lead ID you want to update.
- Switch to the Body tab in Postman.
- Write the following JSON code in the Body tab, replacing placeholders with actual data:

```
{
  "topic": [here write ID to update topic],
  "name": "[here write name to update lead name]",
  "email": "[here write email to update lead email]",
  "phone": "[here write phone number to update lead phone number]",
  "description": "[here write description to update lead description]"
}
```

- Click the 'Send' button to update the lead.

By following these steps, you can easily update topics and leads in PERMALINK CRM using Postman.

API : GET, POST, PUT and DELETE

DELETE

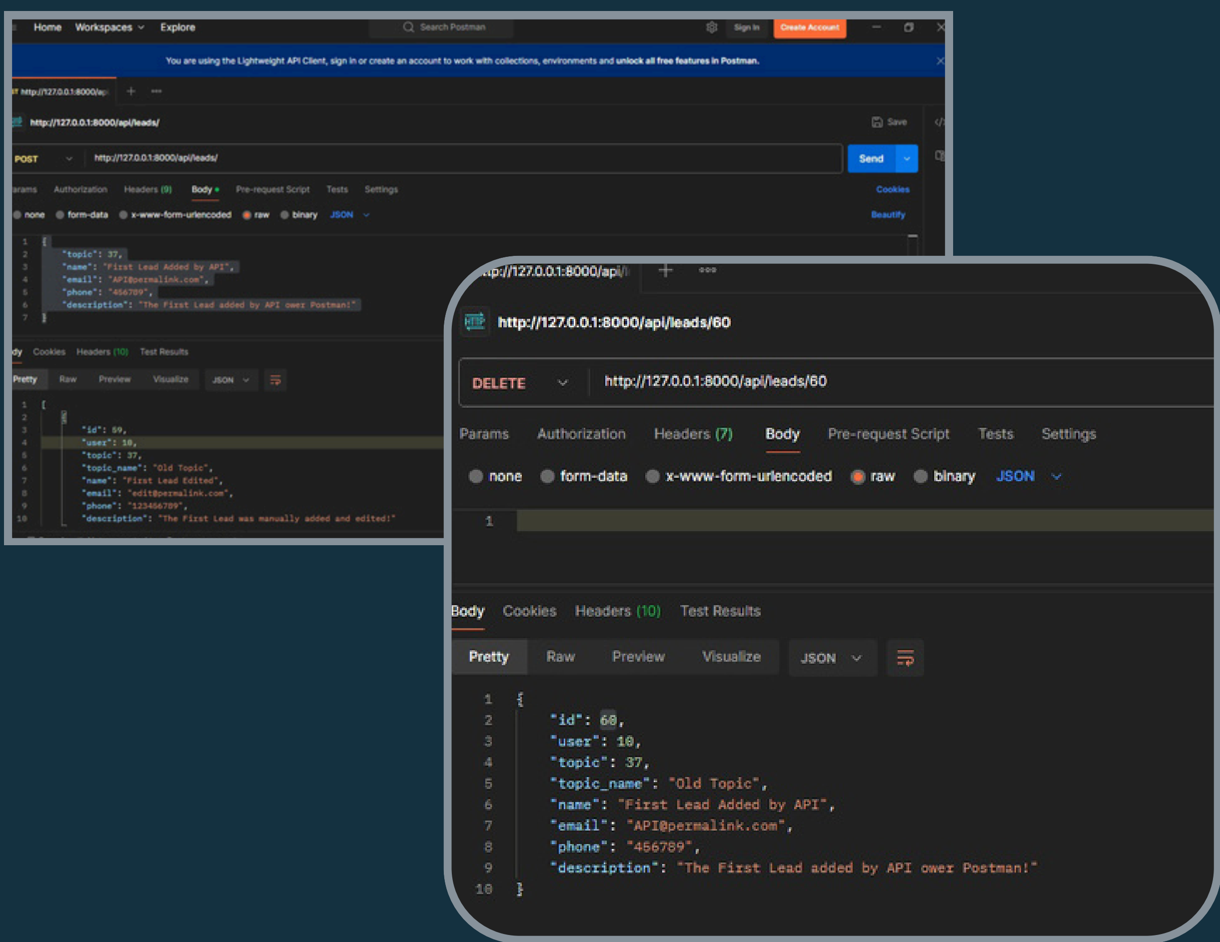
To delete topics or leads in PERMALINK CRM using Postman, follow these steps:

1. DELETE Topic:

- Open Postman and select the DELETE method from the dropdown button.
- In the URL bar, enter [websiteURL]/api/topics/[ID of topic you want to delete], replacing [websiteURL] with the actual URL of your PERMALINK CRM and [ID of topic you want to delete] with the actual Topic ID you want to delete.
- Click the 'Send' button to delete the topic.

2. DELETE Lead:

- Open Postman and select the DELETE method from the dropdown button.
- In the URL bar, enter [websiteURL]/api/leads/[ID of lead you want to delete], replacing [websiteURL] with the actual URL of your PERMALINK CRM and [ID of lead you want to delete] with the actual Lead ID you want to delete.
- Click the 'Send' button to delete the lead.



Conclusion

CRM stands for Customer Relationship Management. In the context of lead capture, a CRM system is a technology that businesses use to manage interactions with current and potential customers. The goal of using a CRM system is to improve business relationships, stay connected with customers, streamline processes, and improve profitability.

In lead capture specifically, a CRM system helps in capturing, storing, and managing information about leads (potential customers) in a centralized and organized manner. It allows businesses to track interactions with leads, manage sales opportunities, and ultimately enhance their ability to convert leads into customers. The CRM system plays a crucial role in managing the entire customer lifecycle, from lead generation to customer retention