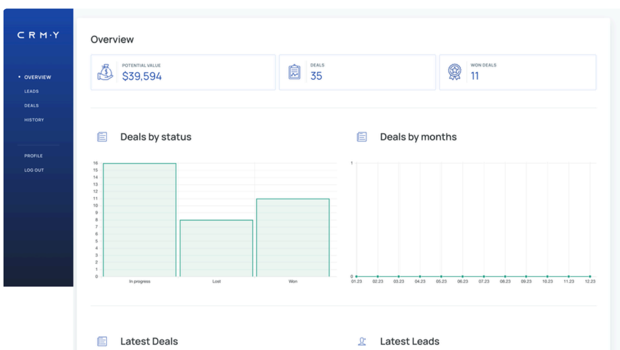
Overview of CRM functionalities

Regular user functionalities

1. Overview page

The overview page provides a simple statistical breakdown of the latest deals. It shows how much each active deal in the system could be worth and also gives some statistics.

The user can see the number of deals grouped by status and by months.



2. Management of leads

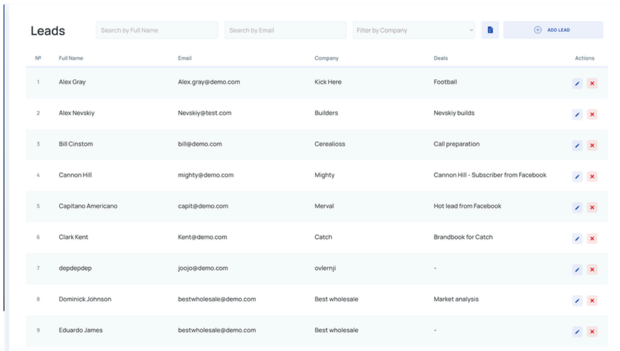
The “Leads” page allows users to manage the database of customers. This is a place where a user can see the information about all previously created customers, add new customers and manage existing ones.

Lead (customer) dataset

Every lead has the following information stored in the system:

- Full name - text value representing the full name of the customer.
- Email - text value representing the email of the customer.
- Company - text value representing the company linked to the customer.

Every user can add new leads and also manage (edit and delete) the information of existing ones. The CRM also has a search functionality, that allows looking for leads by their names, emails, and companies.



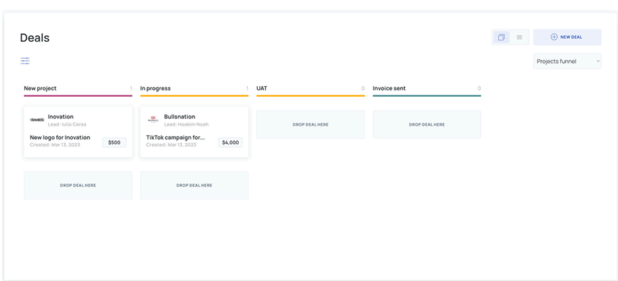
3. Management of deals

The “Deals” page allows users to manage their work related to customers.

There are currently 3 funnels used to organize the work:

- **Leads acquisition funnel** - used for collecting potential customers from different marketing channels and working with them.
- **Offers funnel** - used to organize the work for customers who are interested in the offering and cooperate with the customer until the contract is signed.
- **Projects funnel** - used to manage projects with the signed contracts and track their progress.

The customer can see all the deals added under a specific funnel by choosing it from the list. All deals are shown in their current status:

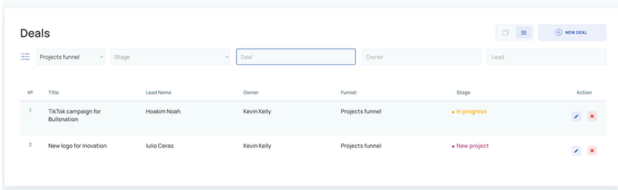


Every deal has the following information:

- Information of the lead (customer).
- Deal title - used to provide a short overview of the deal.
- Short deal description - used to describe the essence of the deal or project.
- Approximate value in $ - used to estimate the budget and profit.
- Assignee - user responsible for the deal.
- Visibility - used to limit the visibility of the deal to other users
- Additional notes - used to store activity about deals and share that with other employees.
- Additional files - used to store the additional files connected to this deal.

The users can edit the deal's information, add notes, and files and move deals from one stage to another.

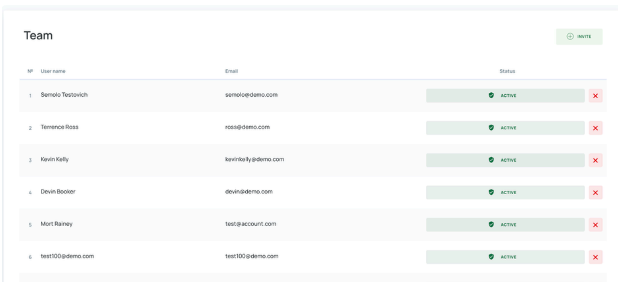
The users can use the filtering functionality and search for the specific deal from the details view of the Deals page:



Administration functionalities

1. Managing users and inviting team members

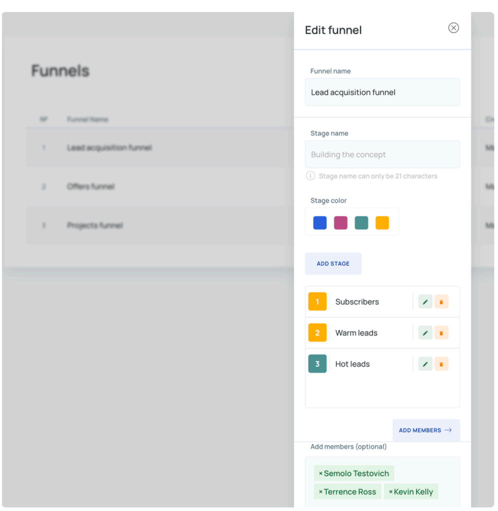
The user with administrator permissions can access the page “Team”, where all users of the CRM can be managed. The administrator can delete users or invite new ones via email.



The invited user will receive an email invitation to join the CRM and will be able to set his own name and password.

2. Management of funnels

The administrator can manage existing funnels in the CRM and also create new ones.



Every funnel has the following information:

- Funnel name
- Funnel stages (with their own names and colours)
- Funnel members - users connected to the funnel, to whom you will be able later to assign deals.

The administrator can add new funnels to the system and edit or delete existing ones.

⚠ It is important to note that deleting the funnel will also delete all the deals associated with it. So you must be careful with this functionality.