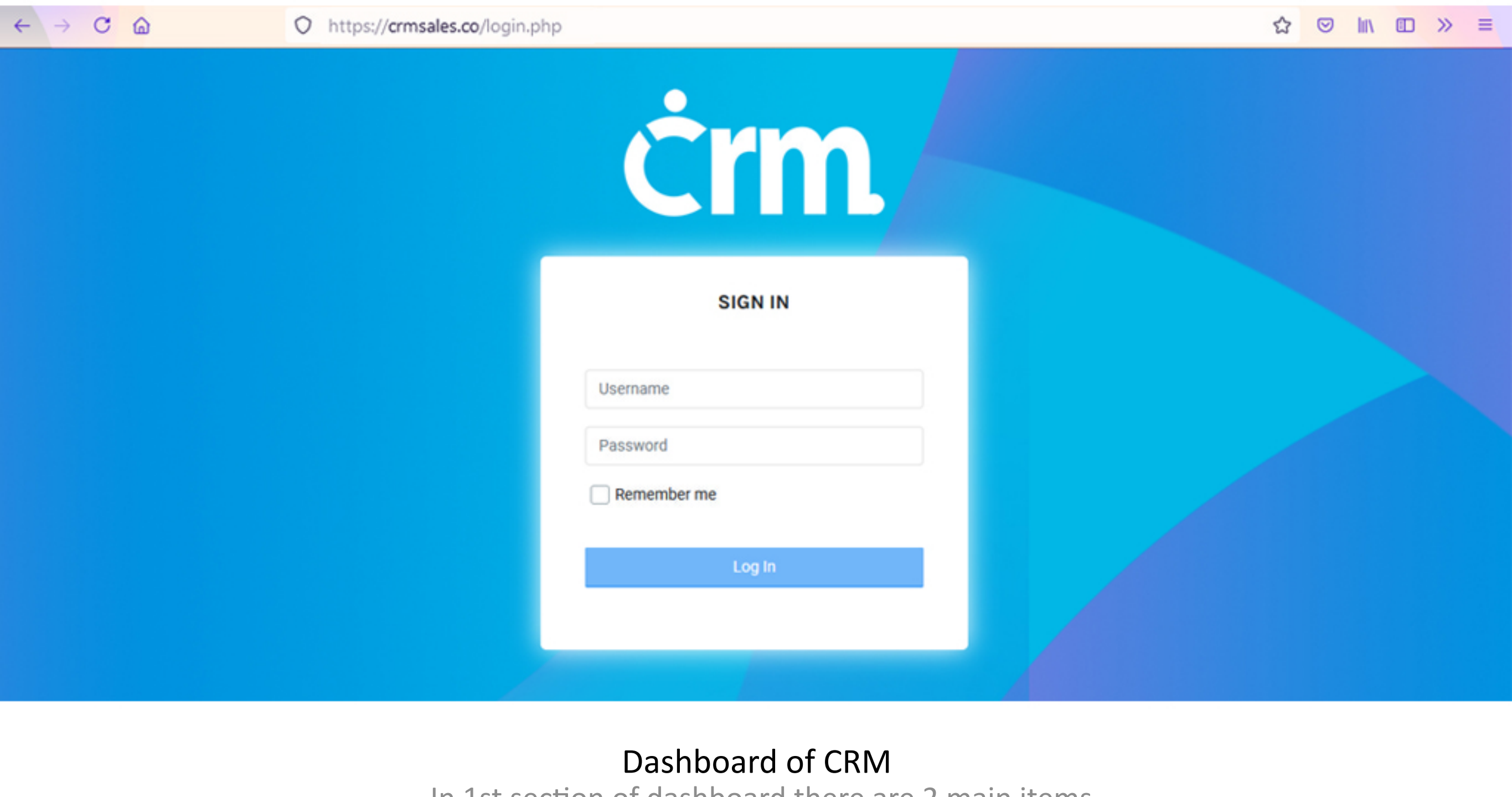


CRM Tutorial

Login to CRM by your Email & Password



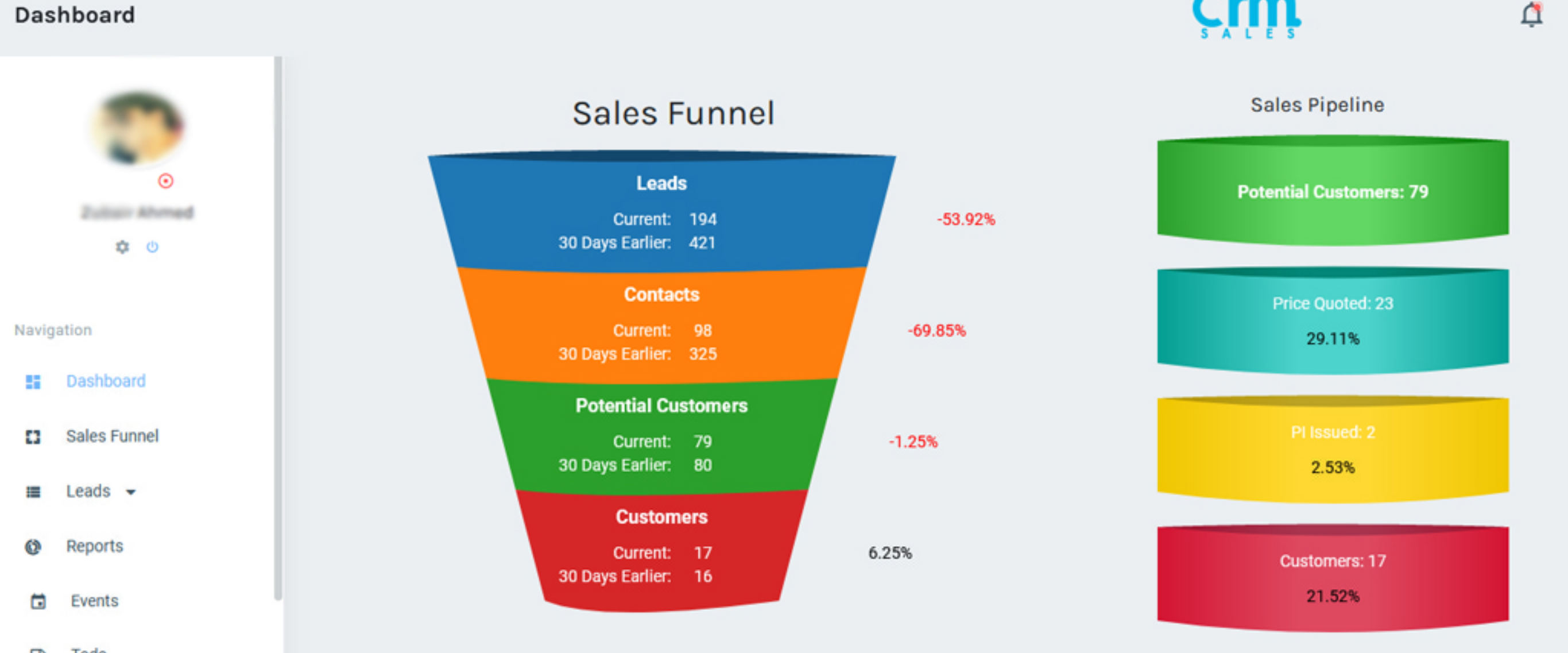
Dashboard of CRM

In 1st section of dashboard there are 2 main items

1. Sales Funnel (it shows you leads summary and comparison of last 30 day).
2. Sales Pipeline (it shows Potential Sales Pipeline summary)

You will also see the button of Capture It! at the bottom through that you can save the image of both the items and can be attached to the monthly report.

You can also see the Menu appearing on the left sidebar.

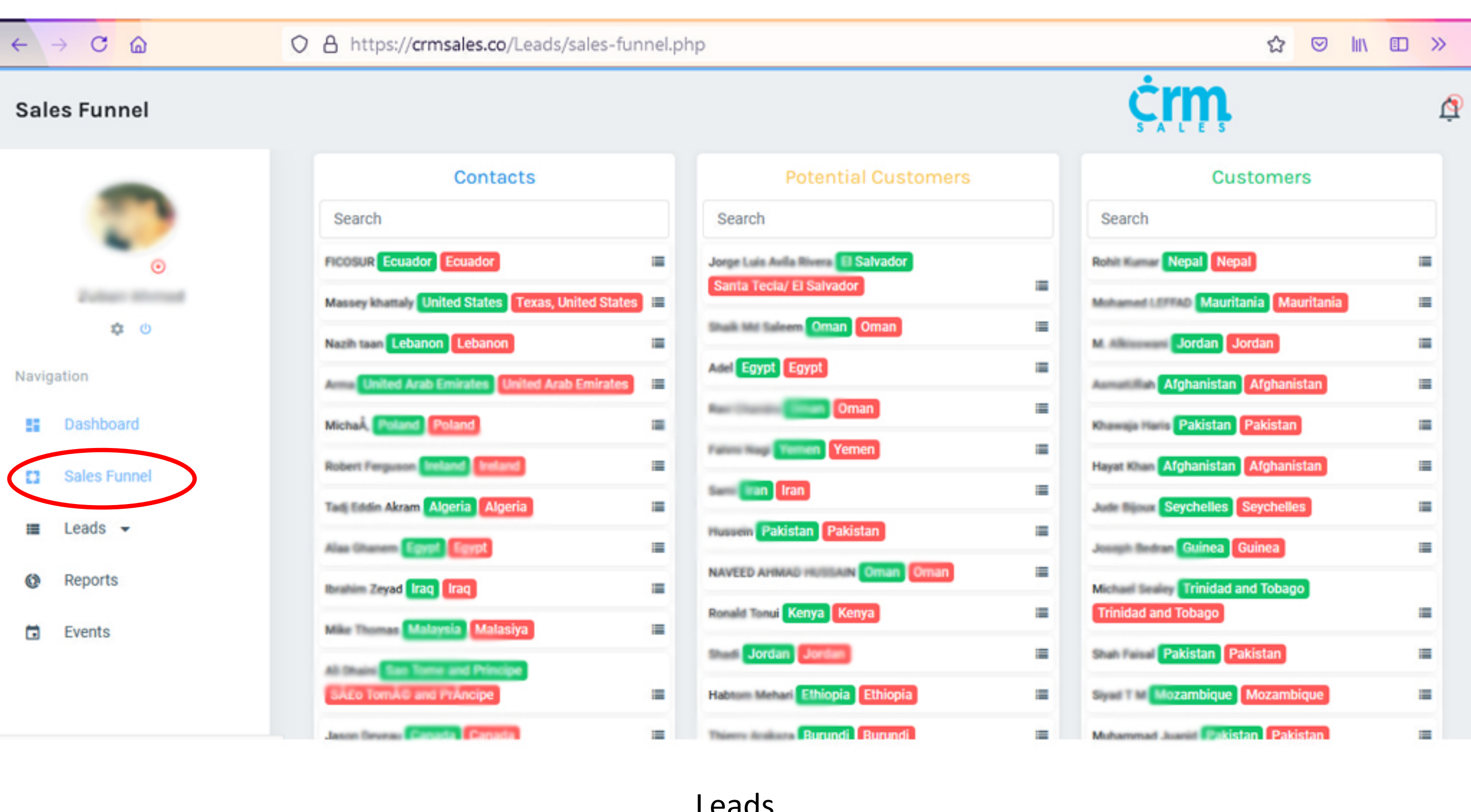


In the second section you can see your Priority customers list and also see a button on the bottom to capture it as an image which can be attached in the monthly report.

#	Contact Person	Company Name	Country	#	Contact Person	Company Name	Country
1	Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador	2	Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador
3	Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador	4	Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador
5	Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador	6	Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador
7	Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador	8	Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador
9	Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador	10	Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador
11	Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador	12	Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador
13	Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador	14	Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador
15	Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador	16	Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador
17	Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador	18	Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador
19	Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador	20	Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador
21	Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador	22	Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador
23	Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador	24	Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador
25	Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador	26	Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador
27	Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador	28	Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador
29	Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador	30	Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador

Sales Funnel

Here you can drag your leads to the contacts, potential and customers, also save it after the changes are made.



Leads

In Lead Section you can view your All Leads, Contacts, Potential Customers, Customers, Not Relevant and also you can add New lead Option.

There is also a search option through that you can easily search your selected leads.

In Action Section there are some buttons through that you can view/edit leads, email them, whatsapp them and also add a reminder for the lead.

Contact Person	Company Name	Country	Priority	Status	Remarks	Action
Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador	Priority 2	In Process	These leads are not relevant for the company.	View Edit Delete
Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador	Priority 2	In Process	These leads are not relevant for the company.	View Edit Delete
Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador	Priority 2	In Process	These leads are not relevant for the company.	View Edit Delete
Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador	Priority 2	In Process	These leads are not relevant for the company.	View Edit Delete
Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador	Priority 2	In Process	These leads are not relevant for the company.	View Edit Delete
Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador	Priority 2	In Process	These leads are not relevant for the company.	View Edit Delete
Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador	Priority 2	In Process	These leads are not relevant for the company.	View Edit Delete
Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador	Priority 2	In Process	These leads are not relevant for the company.	View Edit Delete
Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador	Priority 2	In Process	These leads are not relevant for the company.	View Edit Delete
Yusef Zahir	Alaqaqa LLC/El Salvador	El Salvador	Priority 2	In Process	These leads are not relevant for the company.	View Edit Delete

View Leads

You can view your lead details here and also can edit lead button on the down left. You can also directly change remarks, priority and status from here and hit the submit button to save the changes.

Company Name	Contact Person	Country	Market	Lead Date	Email	Cell Phone	WhatsApp
Alaqaqa LLC/El Salvador	Yusef Zahir	El Salvador	El Salvador	24-06-2021	Yusef Zahir	Yusef Zahir	Yusef Zahir

There is a Discussion button on the top next to Details, from there you can also add your comments and see your previous remarks.

Related Contacts will show that if there is a same contact some other person also have and if its highlighted then its mean other sales person is contact the lead recently.

Date	User	Comment	File
24-06-2021 12:51 PM	Yusef Zahir	These leads are not relevant for the company.	

Add New Leads

From here you can add your leads to your CRM.

Lead Date	Serial Number	Company Name	Contact Person	Country	Market	Email	Cell Phone	Whatsapp/WeChat	Key Points For Sales	Key Points For Source	Remarks	Priority	Query Type	1st Source	2nd Source	Status	Customer Type	Upload Customer Card	Upload Customer Image
dd / mm / yyyy	ZA-26JUN-21											None	Query Type						

- Query Type have 3 Options.
1. Event Queries (which you get from any tyre expo or tyre events)
 2. OT Queries (which you get by Our OT Team or from any campaign which run by OT Team)
 3. Current Contacts (are those leads which you have by your own, like physical visitmarket or by online searching, posting or etc.)

Reports

From here you can view your Leads Statistics.

S.No#	Country	Contacts	Potential Customers	Customers	Total Contacts
1	Pakistan	28	3	3	34
2	Afghanistan	20	1	3	24
3	Yemen	4	6	0	10
4	Kenya	6	3	1	10
5	Iraq	5	4	0	9
6	Iran	5	3	0	8
7	Jordan	5	2	1	8
8	Tanzania	6	1	1	8
9	Oman	5	2	0	7
10	Morocco	7	0	0	7
11	India	6	0	0	6