Quick Reference Guide

OpenCRM

1 LOGGING ON:

- Open your web browser (from the Start Menu or from shortcut on desktop)
- Using the address that has been preconfigured - load login page
- Enter your **username** and **password** and click the **Login** button

2 FINDING A PERSON:

- Select the Contact Tab
- Type in the first few letters of the person's first and/or last name
- Press the **Search** key
- Click on the **Hyperlink** of the person you wish to view
- Remember you can select **Advanced** to see more search options

3 ADDING A PERSON:

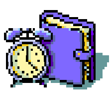
- Select the Contact Tab
- Either Quick Add on left pane -OR-
- Select **New Contact** on Contact page -OR-
- Select New Contact on the sub menu bar (located just under the tabs)
- Type in as much detail as you have about the person (Mandatory fields are marked with a red asterix *)
- Click the **SAVE** button
- If this is a Lead, click the **LEAD TAB** and Quick Add a new Lead in left pane

4 UPDATE EMAIL AND PHONE NOs:

- Find the person/company to update
- Click on the **Edit** button to enter **edit mode**
- Update the required information
- Click **SAVE**

5 VIEWING YOUR CALENDAR:

- Click the **Calendar** TAB
- Select the Calendar view that you require by selecting from the view buttons



6 SCHEDULING TASKS:

- Find the Person, Company or Opportunity -OR- select the **Activity** TAB
- Select the New Activity on the sub menu bar (located just under the tabs) -OR- select the Call, Meeting or Task button at the top of the displayed record.
- Enter dates and details as well as setting any notes - Click the **SAVE** button

7 SCHEDULING APPOINTMENTS:

- Find the Person, Company or Opportunity -OR- select the **Calendar** Tab
- Click on the time on the Calendar view and fill in quick information
- Alternatively, select Meeting from the activity buttons (located at the top of the displayed record)
- Enter the details of the appointment
- Set dates, times and description as well as setting the linked Contact.
- Click the **SAVE** button

8 COMPLETE A TASK/APPOINTMENT:

- Open **Calendar, Activities Tab** or **Contact/Company/Opportunity/Lead** so that you can see your Activities and/or appointments
- Click on the hyperlink to the task or appointment to view it (remember you can select edit or complete from activity grids)
- From the **Status** dropdown list, select **Done**
- Update any details as appropriate
- Click **SAVE**
- If a follow up is required, select the Create Follow Up drop down and complete relevant fields

Software Add-ons - The Home of OpenCRM
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USING TEMPLATES:

- Find the Contact or Company you wish to create the document for
- Select the Document Sub Tab
- Chose the New Document button
- Use 'Select Document Template'
- Give the document a name (subject)
- Link the document to other entities
- Chose a document Type or Folder to help categorise your different documents
- Select whether to display this document on the web portal (if configured)
- Change any custom fields as appropriate
- If you need to make changes to the layout of the document, these are found under 'Paper Format'
- After linking to a Contact you can Preview the document and Print.

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SENDING EMAIL:

- Find the contact that you wish to send the email to -OR- select New Email from the sub menu bar (located just under the tabs)
- Click on the **Email** button this will create an email to this entity
- Select the **template** that you wish to use
- Complete the email with any information that is required, using the HTML editor
- Select the **SEND** or **SAVE** (draft) button

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CREATING A LEAD:

- Select the **Lead** Tab
- Quick Add a new Lead located in the left pane -OR- select **New Lead** on the lead grid -OR- select New Lead on the sub menu bar
- Select the **SAVE** button to complete lead entry
- Click on the **Email** button to send an email to this specific lead

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CREATING OPPORTUNITIES:

- Find the person or company you wish to create the opportunity for
- Click the **Opportunity tab** then click the **New Opportunity** button on the grid -OR- select Opportunity from action buttons (located at the top of the displayed record)
- Enter the details of the opportunity, remember to include estimated close dates and opportunity % probability and amounts
- Click **SAVE** once complete
- You can add **Product's** to the Product Sub Tab.
- Click **New Product** button to add links to or create a new product

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FURTHER INFORMATION:

- Support line: **08452 303083 - option 2**
- Support email: **support@opencrm.co.uk**
- Please quote your support contract number when contacting us about support issues