CRM OS - Quick Start Guide

After finishing the setup you can follow this quick start guide to start working with the CRM OS application.

STEP 01 - Login

Already an admin and staff account has been created. You can just log in using username: admin, password: admin. After login change your username and password.

STEP 02 - Dashboard

You will see the dashboard after logging in. You can find your business summary here. From the dashboard, you will get your company's total salary, employee number, present, and leave and absent employee numbers. Also can see the announcements and public holidays.

STEP 03 - Create new employee and view employee data

From the **Setup** menu, you can create new employee, view the employee list, view single employee data, and manage the **Role**, **Designation,** and **Department** of the employee.

STEP 04 - Contact Management

From the top nav under the **Contact** menu, you can see all of your contacts and create new contact. Clicking on the contact name or action button you can view the details about that contact in a single view page. Also, you can see all the related things regarding that contact.

← → Home / contact

| | Filter | Search | 🔍 |

Download CSV   Column Selected ⌄

	Name	Email	Phone number	Owner	Company
☐	rakibul shaon	shaon@gmail.com	01820361645	omega solution	abc
☐	rakibul shaon	shaon@gmail.com	01820361645	omega solution	abcd
☐	rakibul shaon	shaon@gmail.com	01820361645	omega solution	abc
☐	rakibul shaon	shaon@gmail.com	01820361645	omega solution	abcd
☐	rakibul shaon	shaon@gmail.com	01820361645	omega solution	abc
☐	rakibul shaon	shaon@gmail.com	01820361645	omega solution	abcd
☐	rakibul shaon	shaon@gmail.com	01820361645	omega solution	abc
☐	rakibul shaon	shaon@gmail.com	01820361645	omega solution	abcd
☐	rakibul shaon	shaon@gmail.com	01820361645	omega solution	abc
☐	rakibul shaon	shaon@gmail.com	01820361645	omega solution	abcd

✕ Create Contact

* Email ⓘ
example@email.com

First Name
Jhon

Last Name
Doe

Birthday
Select birthday 📅

Contact owner
Select contact owner name ⌄

Company
Select company Name ⌄

Job title
CEO

Phone number
+8801700000000

Department
IT

Twitter
http://twitter.com/jhon

Present city
Dhaka

Present Zip Code
1361

Present state
Dhaka

Birthday
Select birthday 📅

Present country
Bangladesh

Permanent address
Enter permanent address

Permanent city
Dhaka

Permanent Zip Code
Dhaka

Permanent state
Dhaka

Permanent country
Bangladesh

Industry
Select Industry ⌄

← → Home / contact / 25

Actions ▾

| Prospect | Lead | Marketing Qualified Lead (MQL) | Sales Qualified Lead (SQL) | Opportunity |

⬤ **rakibul shaon** ✏️
dev at abc
shaon@gmail.com

⌄ **About this contact**

Contact Owner ⓘ
omega solution ⌄

Email
shaon@gmail.com ✏️

Phone Number
01820361645 ✏️

Date of birth
2022-04-24 📅

Company ⓘ
abc ⌄

Industry ⓘ
Chemicals ⌄

Stage ⓘ

Task   + Add

Name	Assignee	Type	Status	Priority	Notes	Action
Burke Sims	omega solution	Event	in-progress	medium	-	✏️
Burke Sims	omega solution	Event	in-progress	medium	-	✏️

Company

Name	Email	Phone Number	Type	Industry
abc	pqw@gmail.com	4810165150		

Opportunity   + Add

Name

No data

STEP 05 - Company Management

From the top nav under the **Company** menu, you can see all of your companies and create new company. Clicking on the company name or action button you can view the details about that company in a single view page. Also, you can see all the related things regarding that company.

STEP 06 - Opportunity Management

From the top nav under the **Opportunity** menu, you can see all of your opportunities and create new opportunity. Clicking on the opportunity name or action button you can view the details about that opportunity in a single view page. Also, you can see all the related things regarding that opportunity.

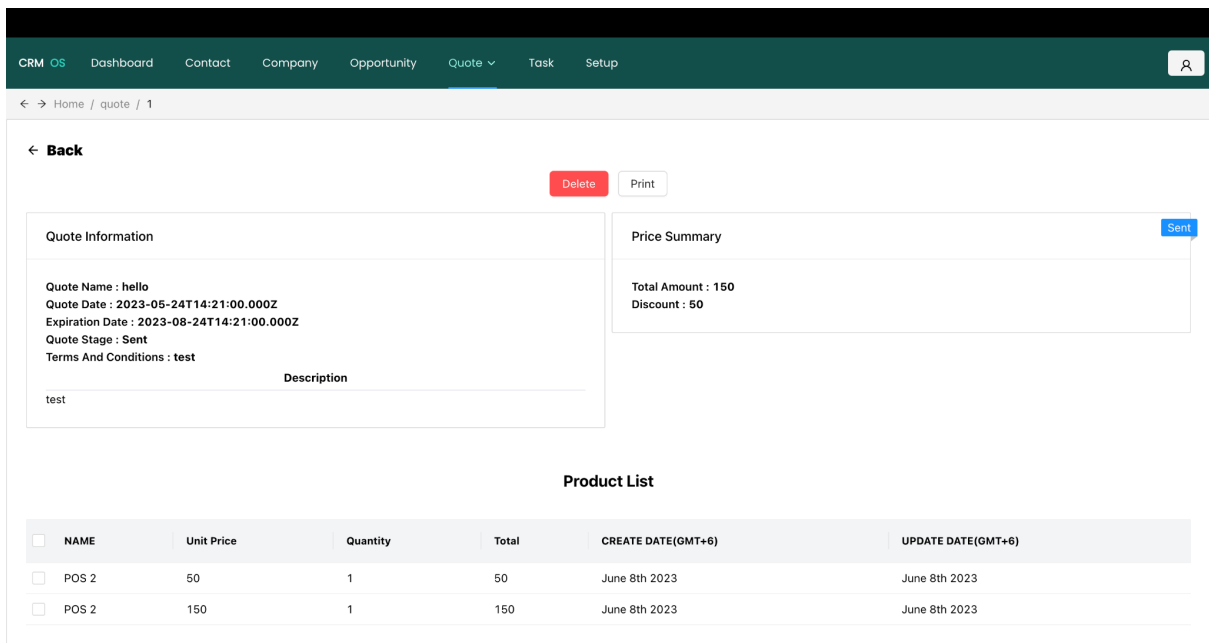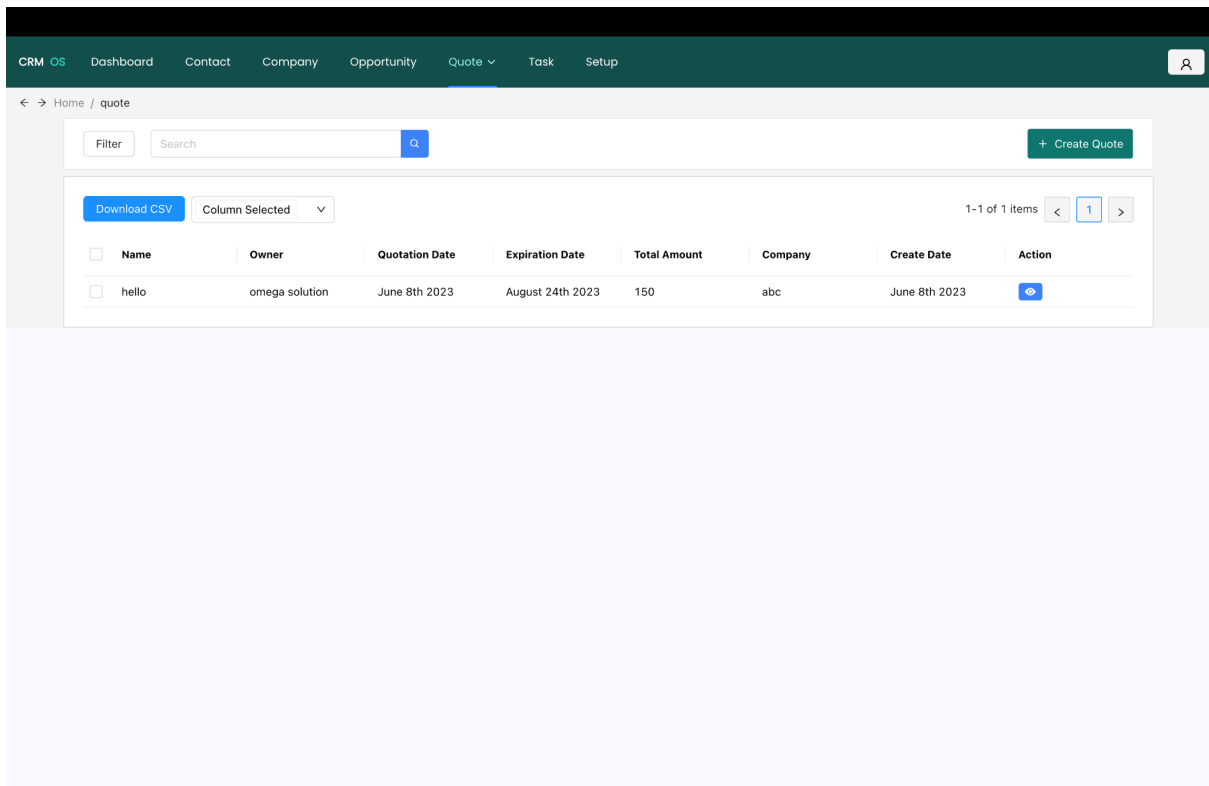## STEP 07 - Quote Management

From the top nav under the **Quote** menu, you can see all of your quotes and create new quote. Clicking on the quote name or action button you can view the details about that quote in a single view page. Also, you can see all the related things regarding that quote.

STEP 08 - Task Management

From the top nav under the **Task** menu, you can see all of your tasks and create new task. Clicking on the task name or action button you can view the details about that task in a single view page. Also, you can see all the related things regarding that task.
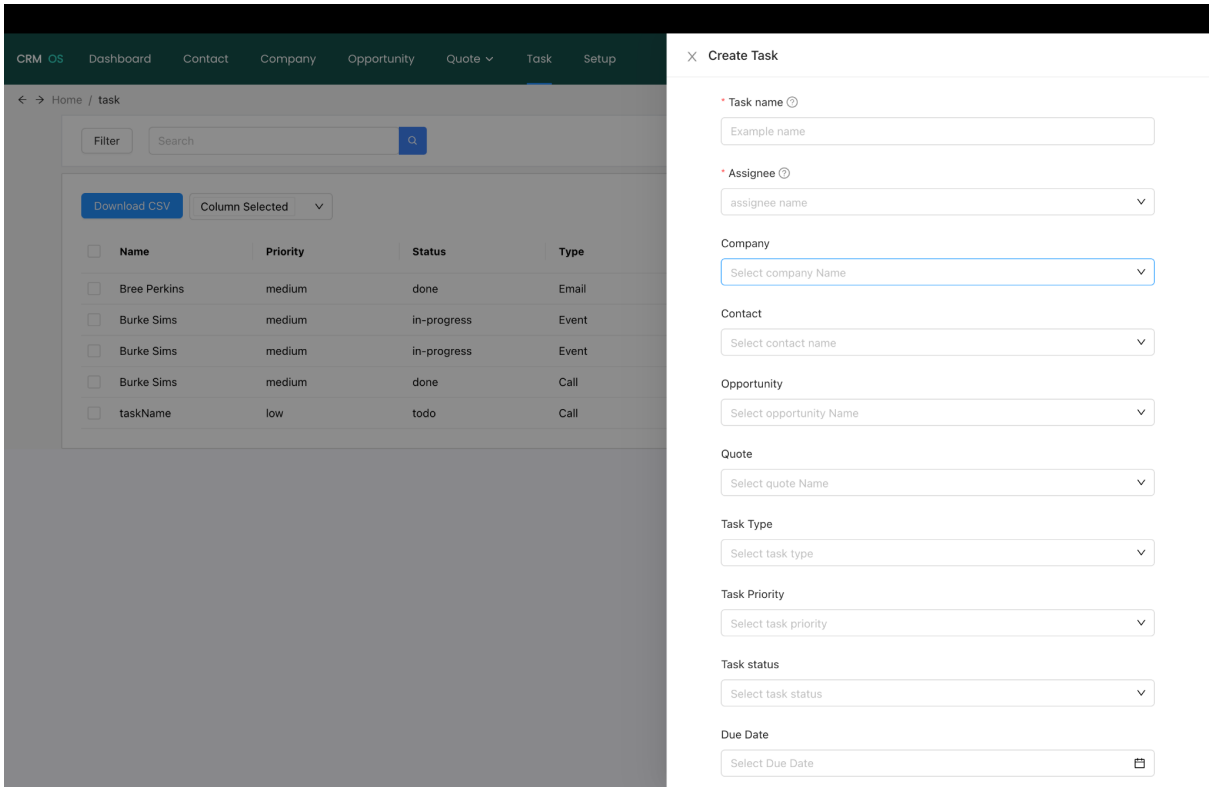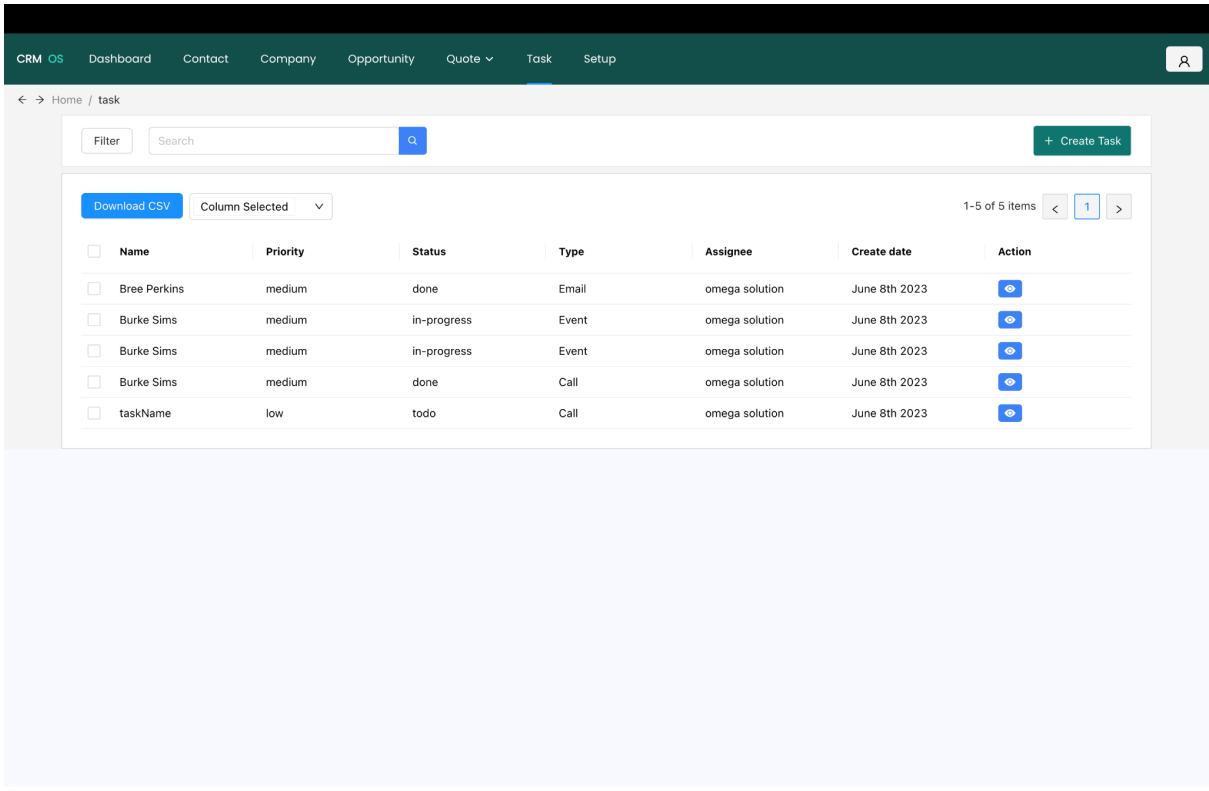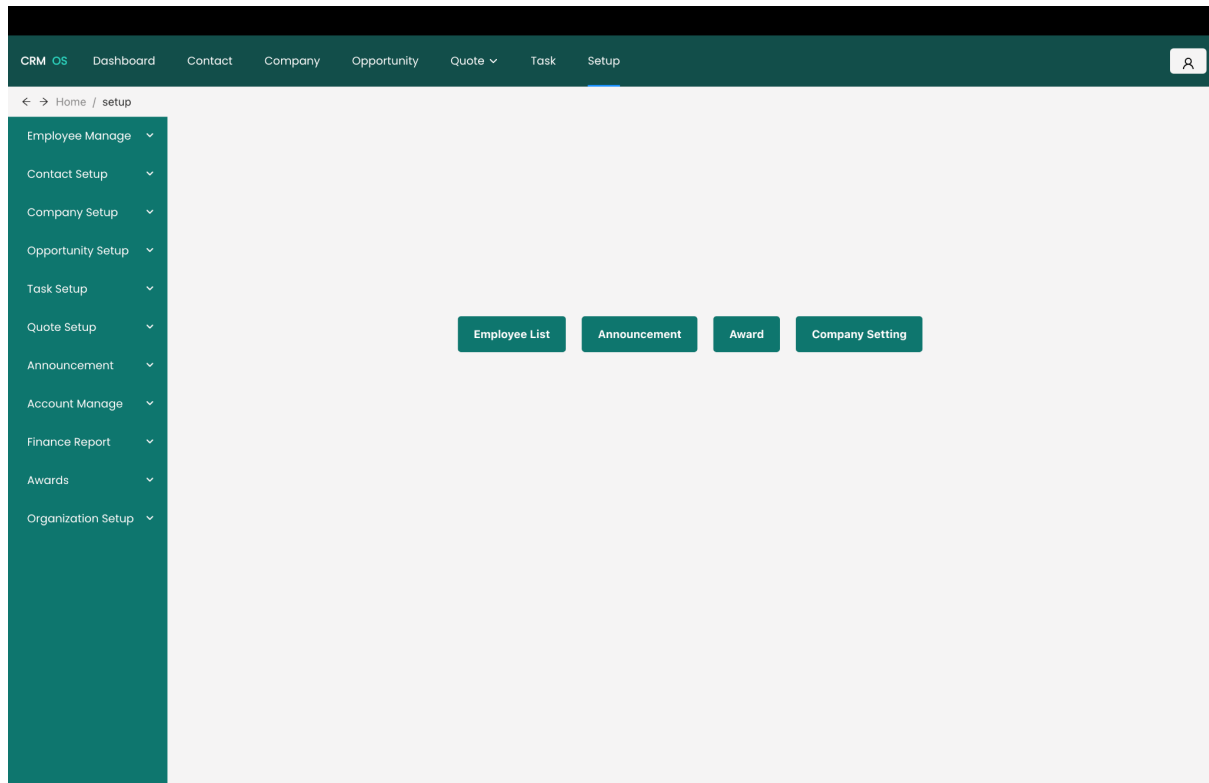
STEP 9 - Announcements and Awards management

You can create announcements for the employee which will show up in the dashboard. Also, you can create awards and assign awards to employees.

STEP 10 - Setup page

You can set up all the stages, sources, and other setup-related functionalities from a centralized setup page under the **Setup** menu.

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Please email us if you need any help with using the application. We will assist you as soon as possible and in most cases within 1 day. Customer satisfaction is the most important thing that we care about.

CONTACT INFORMATION:

Website: solution.omega.ac
Email: solution@omega.ac