

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.

Login

* Username :

admin

* Password :

Submit

username	password
staff	staff
admin	admin

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.

CRM OSDashboardContactCompanyOpportunityQuoteTaskSetup

Home / dashboard

Total Users1

Total Contact23

Total Company11

Opportunity1

Value100,000

Quote1

Value150

Recent contactsView More

Name	Email	Phone number	Create Date
rakibul shaon	shaon@gmail.com	01820361645	June 8th 2023
rakibul shaon	shaon@gmail.com	01820361645	June 8th 2023
rakibul shaon	shaon@gmail.com	01820361645	June 8th 2023
rakibul shaon	shaon@gmail.com	01820361645	June 8th 2023
rakibul shaon	shaon@gmail.com	01820361645	June 8th 2023

Recent companiesView More

Name	Email	Phone number	Create Date
abc	pqw@gmail.com	4810165150	June 8th 2023
abc	pqw@gmail.com	4810165150	June 8th 2023
abcd	pqw@gmail.com	48101635150	June 8th 2023
abc	pqw@gmail.com	4810165150	June 8th 2023
abcd	pqw@gmail.com	48101635150	June 8th 2023

Recent opportunitiesView More

Name	Owner	Amount	Create Date
test	omega solution	100000	June 8th 2023

Recent quotesView More

Name	Owner	Quotation Date	Create Date
hello	omega solution	June 8th 2023	June 8th 2023

ANNOUNCEMENTS

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.

Add New Employee

User Information

- * First Name: John
- * Last Name: Doe
- * User Name: john_doe
- * Password: Strong Password
- * Email: johndoe2@example.com

Address Information

- * Street: 123 Main Street
- * City: Los Angeles
- * State: CA
- * Zip Code: 90211
- * Country: USA

Employee Information

- * Joining Date: Select date
- Leave Date: Select date
- * Employee ID: OE-012
- * Blood Group: Select Blood Group
- * Employee Status: Select Status
- * Department: Select Department
- * Role: Please select
- * Shift: Please select

Designation & Salary Information

- * Designation: Please select Designation
- * Designation Start Date: Select date
- Designation End Date: Select date
- * Salary:
- * Salary Start Date: Select date
- Salary End Date: Select date
- Salary Comment:

Education Information

Please add education information using the button below

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.

Contact Management

Filter Search + Create Contact

Download CSV Column Selected 1-10 of 23 items 1 2 3 10 / page

<input type="checkbox"/>	Name	Email	Phone number	Owner	Company	Source	Stage	Industry	Create date	Action
<input type="checkbox"/>	rakibul shaon	shaon@gmail.com	01820361645	omega solution	abc	Website	Sales Qualified Lead (SQL)	Chemicals	June 8th 2023	
<input type="checkbox"/>	rakibul shaon	shaon@gmail.com	01820361645	omega solution	abcd	Website	Lead	Chemicals	June 8th 2023	
<input type="checkbox"/>	rakibul shaon	shaon@gmail.com	01820361645	omega solution	abc	Website	Customer	Chemicals	June 8th 2023	
<input type="checkbox"/>	rakibul shaon	shaon@gmail.com	01820361645	omega solution	abcd	Website	Lead	Chemicals	June 8th 2023	
<input type="checkbox"/>	rakibul shaon	shaon@gmail.com	01820361645	omega solution	abc	Website	Lead	Chemicals	June 8th 2023	
<input type="checkbox"/>	rakibul shaon	shaon@gmail.com	01820361645	omega solution	abcd	Website	Lead	Chemicals	June 8th 2023	
<input type="checkbox"/>	rakibul shaon	shaon@gmail.com	01820361645	omega solution	abc	Website	Lead	Chemicals	June 8th 2023	
<input type="checkbox"/>	rakibul shaon	shaon@gmail.com	01820361645	omega solution	abcd	Website	Lead	Chemicals	June 8th 2023	
<input type="checkbox"/>	rakibul shaon	shaon@gmail.com	01820361645	omega solution	abc	Website	Lead	Chemicals	June 8th 2023	
<input type="checkbox"/>	rakibul shaon	shaon@gmail.com	01820361645	omega solution	abcd	Website	Lead	Chemicals	June 8th 2023	

CRMOSDashboardContactCompanyOpportunityQuoteTaskSettings

Home / contact

Filter

Search

Q

Download CSV

Column Selected

<input type="checkbox"/>	Name	Email	Phone number	Owner	Company
<input type="checkbox"/>	rakibul shaon	shaon@gmail.com	01820361645	omega solution	abc
<input type="checkbox"/>	rakibul shaon	shaon@gmail.com	01820361645	omega solution	abcd
<input type="checkbox"/>	rakibul shaon	shaon@gmail.com	01820361645	omega solution	abc
<input type="checkbox"/>	rakibul shaon	shaon@gmail.com	01820361645	omega solution	abcd
<input type="checkbox"/>	rakibul shaon	shaon@gmail.com	01820361645	omega solution	abc
<input type="checkbox"/>	rakibul shaon	shaon@gmail.com	01820361645	omega solution	abcd
<input type="checkbox"/>	rakibul shaon	shaon@gmail.com	01820361645	omega solution	abc
<input type="checkbox"/>	rakibul shaon	shaon@gmail.com	01820361645	omega solution	abcd
<input type="checkbox"/>	rakibul shaon	shaon@gmail.com	01820361645	omega solution	abc
<input type="checkbox"/>	rakibul shaon	shaon@gmail.com	01820361645	omega solution	abcd

Create Contact

* Email

example@email.com

Present city

Dhaka

First Name

Jhon

Present Zip Code

1361

Last Name

Doe

Present state

Dhaka

Birth day

Select birthday

Present country

Bangladesh

Contact owner

Select contact owner name

Permanent address

Enter permanent address

Company

Select company Name

Permanent city

Dhaka

Job title

CEO

Permanent Zip Code

Dhaka

Phone number

+8801700000000

Permanent state

Dhaka

Department

IT

Permanent country

Bangladesh

Twitter

http://twitter.com/jhon

Industry

Select Industry

CRM OS Dashboard Contact Company Opportunity Quote Task Setup

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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 ⓘ

Actions ▾ Prospect Lead Marketing Qualified Lead (MQL) Sales Qualified Lead (SQL) Opportunity

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.

CRM OSDashboardContactCompanyOpportunityQuoteTaskSetup

Home / company

FilterSearch

+ Create Company

Download CSVColumn Selected

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	Name	Email	Phone number	Owner	Type	Size	Annual Revenue	Industry	Action
<input type="checkbox"/>	abc	pqw@gmail.com	4810165150	omega solution	Private	10	10000	Automotive	
<input type="checkbox"/>	abc	pqw@gmail.com	4810165150	omega solution	Private	10	10000	Automotive	
<input type="checkbox"/>	abcd	pqw@gmail.com	48101635150	omega solution	Private	10	10000	Banking and Finance	
<input type="checkbox"/>	abc	pqw@gmail.com	4810165150	omega solution	Private	10	10000	Automotive	
<input type="checkbox"/>	abcd	pqw@gmail.com	48101635150	omega solution	Private	10	10000	Banking and Finance	
<input type="checkbox"/>	abc	pqw@gmail.com	4810165150	omega solution	Private	10	10000	Automotive	
<input type="checkbox"/>	abcd	pqw@gmail.com	48101635150	omega solution	Private	10	10000	Banking and Finance	
<input type="checkbox"/>	abc	pqw@gmail.com	4810165150	omega solution	Private	10	10000	Automotive	
<input type="checkbox"/>	abcd	pqw@gmail.com	48101635150	omega solution	Private	10	10000	Banking and Finance	
<input type="checkbox"/>	abc	pqw@gmail.com	4810165150	omega solution	Private	10	10000	Automotive	

CRM OSDashboardContactCompanyOpportunityQuoteTaskSetup

Home / company / 1

Actions

abcxyz.net4810165150

About this company

Company Owner Company Type Industry Company Size Annual Revenue Billing Address

Task

Name	Assignee	Type	Status	Priority	Notes	Action
taskName	omega solution	Call	todo	low	notes	

Contacts

Name	Email	Phone number
rakibul shaon	shaon@gmail.com	01820361645
rakibul shaon	shaon@gmail.com	01820361645
rakibul shaon	shaon@gmail.com	01820361645
rakibul shaon	shaon@gmail.com	01820361645
rakibul shaon	shaon@gmail.com	01820361645

Opportunity

Name
test

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.

CRM OSDashboardContactCompanyOpportunityQuoteTaskSetup

Home / opportunity

FilterSearch

+ Create Opportunity

Download CSVColumn Selected

1-1 of 1 items

	Name	Owner	Amount	Company	Stage	Type	Source	Create date	Action
<input type="checkbox"/>	test	omega solution	100000	abc	Closed Lost	New Business	Email Campaign	June 8th 2023	

CRM OSDashboardContactCompanyOpportunityQuoteTaskSetup

Home / opportunity / 1

test
Amount: 100000
Opportunity Stage: Proposal/Quote

About this Opportunity

Opportunity Owner
omega solution

Competitors
shaon

Next Step
test

Opportunity Create Date
2024-04-24

Opportunity Close Date
2024-05-24

Company
abc

Contact

Actions

ProspectQualificationNeeds AssessmentProposal/QuoteNegotiation/ReviewClosed WonClosed Lost

Task

Name	Assignee	Type	Status	Priority	Notes	Action
taskName	omega solution	Call	todo	low	notes	

Company

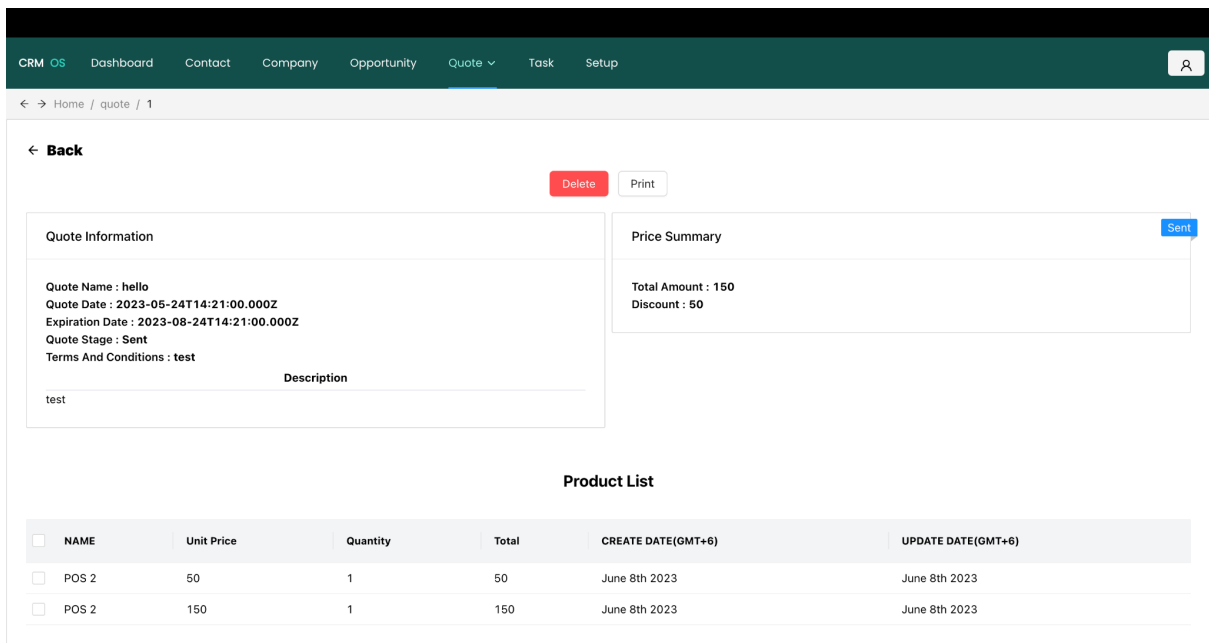
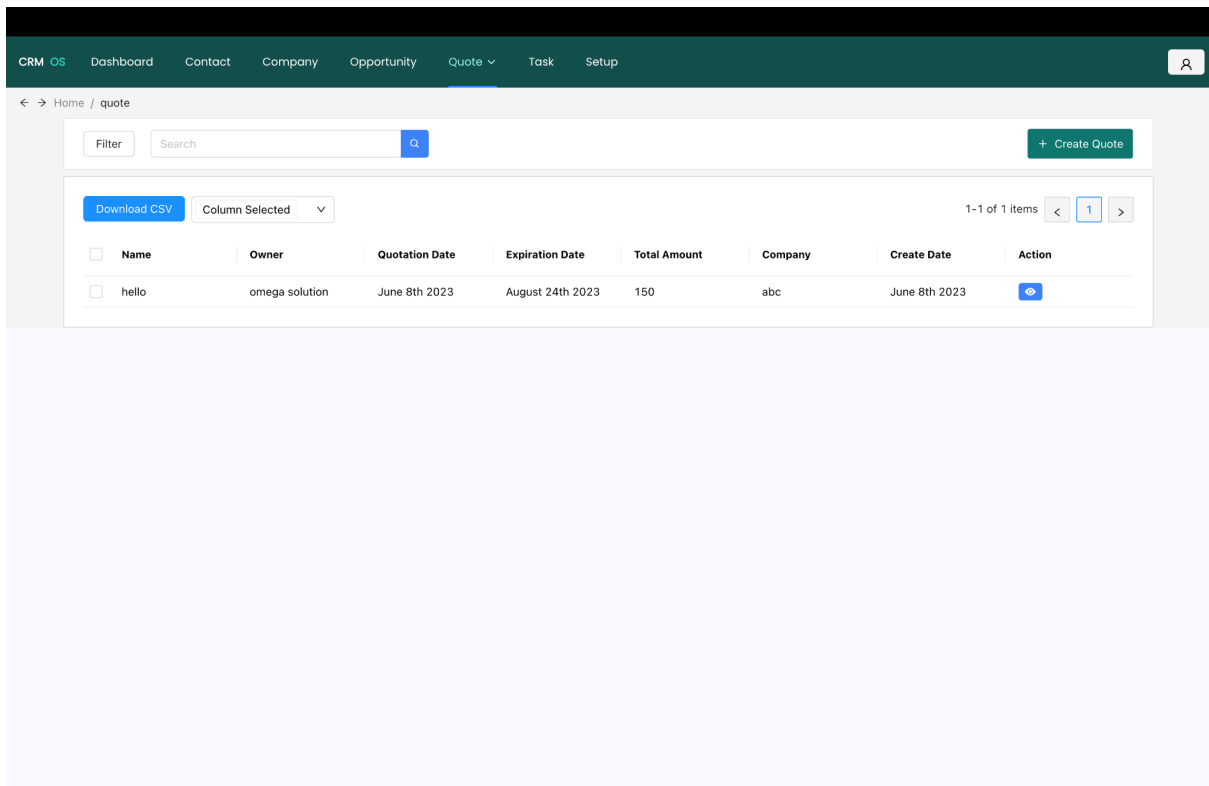
Name
abc

Contact

Name
-

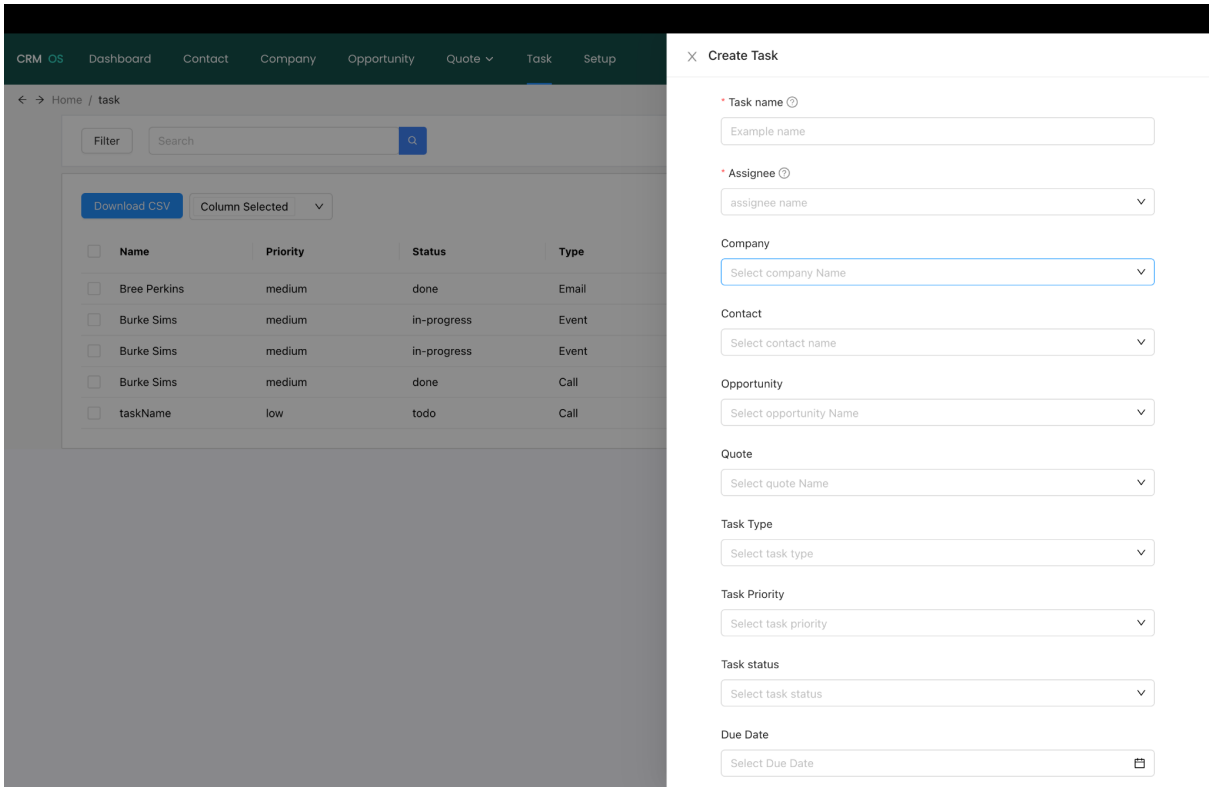
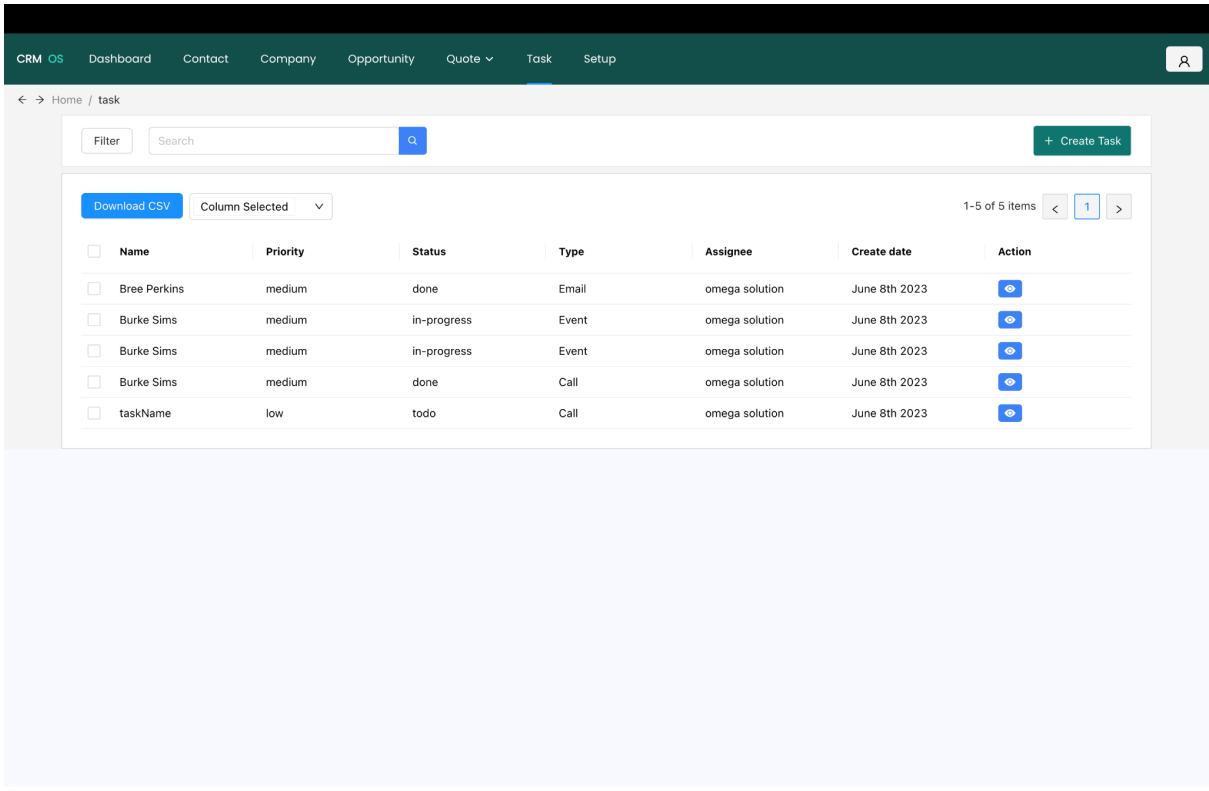
STEP 07 - Quote Management

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.

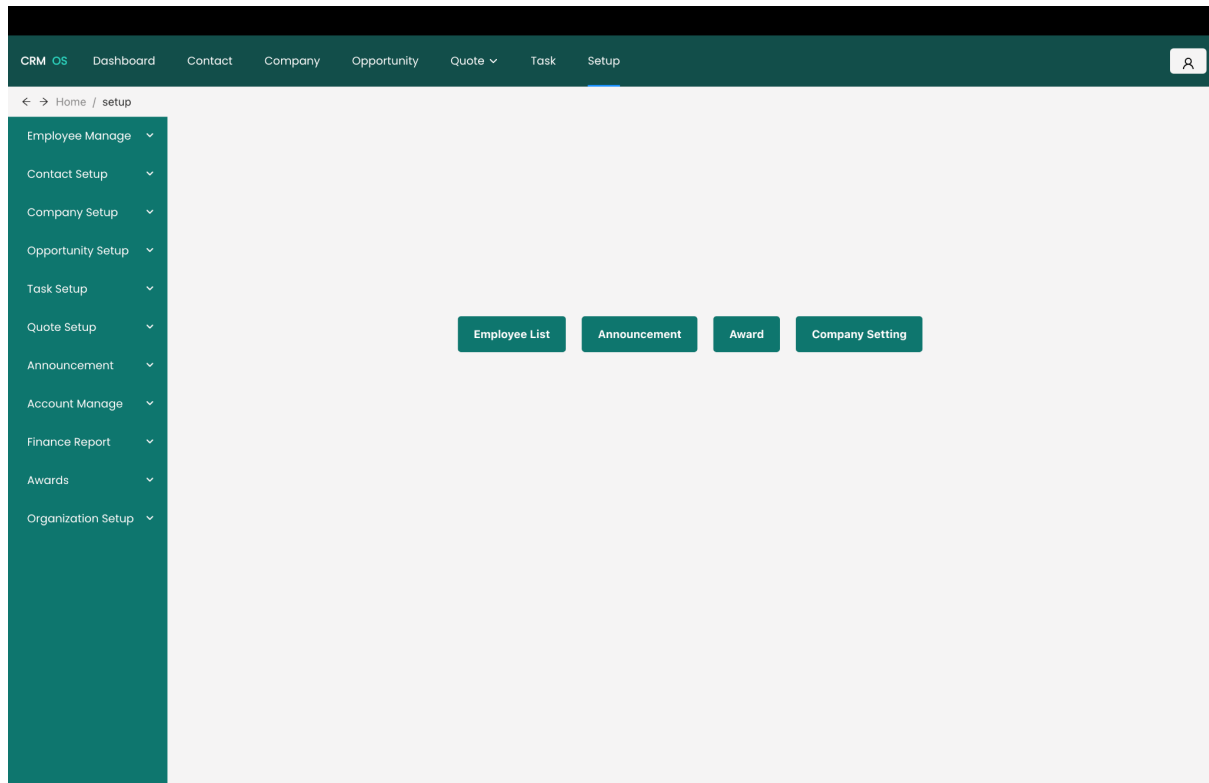


STEP 9 - Announcements and Awards management

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.



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