

# 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.

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 OS Dashboard Contact Company Opportunity Quote Task Setup

Home / dashboard

Total Users: 1

Total Contact: 23

Total Company: 11

Opportunity: 1, Value: 100,000

Quote: 1, Value: 150

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

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

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

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.

The 'Add New Employee' form includes the following sections and fields:

- User Information:** First Name (John), Last Name (Doe), User Name (john\_doe), Password (Strong Password), Email (john.doe2@example.com).
- Address Information:** Street (123 Main Street), City (Los Angeles), State (CA), Zip Code (90211), Country (USA).
- Employee Information:** Joining Date, Leave Date, Employee ID (OE-012), Blood Group, Employee Status, Department, Role, Shift.
- Designation & Salary Information:** Designation, Designation Start Date, Designation End Date, Salary, Salary Start Date, Salary End Date, Salary Comment.
- Education Information:** A red text prompt: "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.

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

CRM OS Dashboard Contact Company Opportunity Quote Task Setup

Home / contact

Filter Search

Download CSV Column Selected

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
<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  Present city

First Name  Present Zip Code

Last Name  Present state

BirthDay  Present country

Contact owner  Permanent address

Company  Permanent city

Job title  Permanent Zip Code

Phone number  Permanent state

Department  Permanent country

Twitter  Industry

CRM OS Dashboard Contact Company Opportunity Quote Task Setup

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

Email

Phone Number

Date of birth

Company

Industry

Stage

**Task** + Add

Name	Assignee	Type	Status	Priority	Notes	Action
Burke Sims	omega solution	Event	in-progress	medium	-	<input type="checkbox"/>
Burke Sims	omega solution	Event	in-progress	medium	-	<input type="checkbox"/>

**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 OS Dashboard Contact **Company** Opportunity Quote Task Setup

Home / company

Filter Search [q] + Create Company

Download CSV Column Selected 1-10 of 11 items 1 2 10 / page

<input type="checkbox"/>	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 OS Dashboard Contact **Company** Opportunity Quote Task Setup

Home / company / 1

Actions

**abc**  
xyz.net  
4810165150

**About this company**

Company Owner  
omega solution

Company Type  
Private

Industry  
Automotive

Company Size  
10

Annual Revenue  
10000

**Billing Address**  
Billing State  
billingState

**Task** + Add

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

**Contacts** + Add

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

**Opportunity** + Add

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.

The screenshot shows the CRM interface for Opportunity Management. The top navigation bar includes CRM OS, Dashboard, Contact, Company, Opportunity, Quote, Task, and Setup. The breadcrumb trail is Home / opportunity. A search bar and a '+ Create Opportunity' button are visible. Below the search bar, there is a 'Download CSV' button and a 'Column Selected' dropdown. The table shows 1-1 of 1 items. The table has columns for Name, Owner, Amount, Company, Stage, Type, Source, Create date, and Action. The data row shows: test, omega solution, 100000, abc, Closed Lost, New Business, Email Campaign, June 8th 2023, and an action button.

Name	Owner	Amount	Company	Stage	Type	Source	Create date	Action
test	omega solution	100000	abc	Closed Lost	New Business	Email Campaign	June 8th 2023	

The screenshot shows the CRM interface for Opportunity Management detail view. The top navigation bar is the same as the list view. The breadcrumb trail is Home / opportunity / 1. The 'Actions' dropdown is open, showing a progress bar with stages: Prospect, Qualification, Needs Assessment, Proposal/Quote (selected), Negotiation/Review, Closed Won, and Closed Lost. The main content area is divided into sections: Task, Company, and Contact. The Task section has a table with columns: Name, Assignee, Type, Status, Priority, Notes, and Action. The Company section has a form with a Name field. The Contact section has a form with a Name field. The left sidebar contains details for the opportunity: 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, and Contact.

**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:

**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.

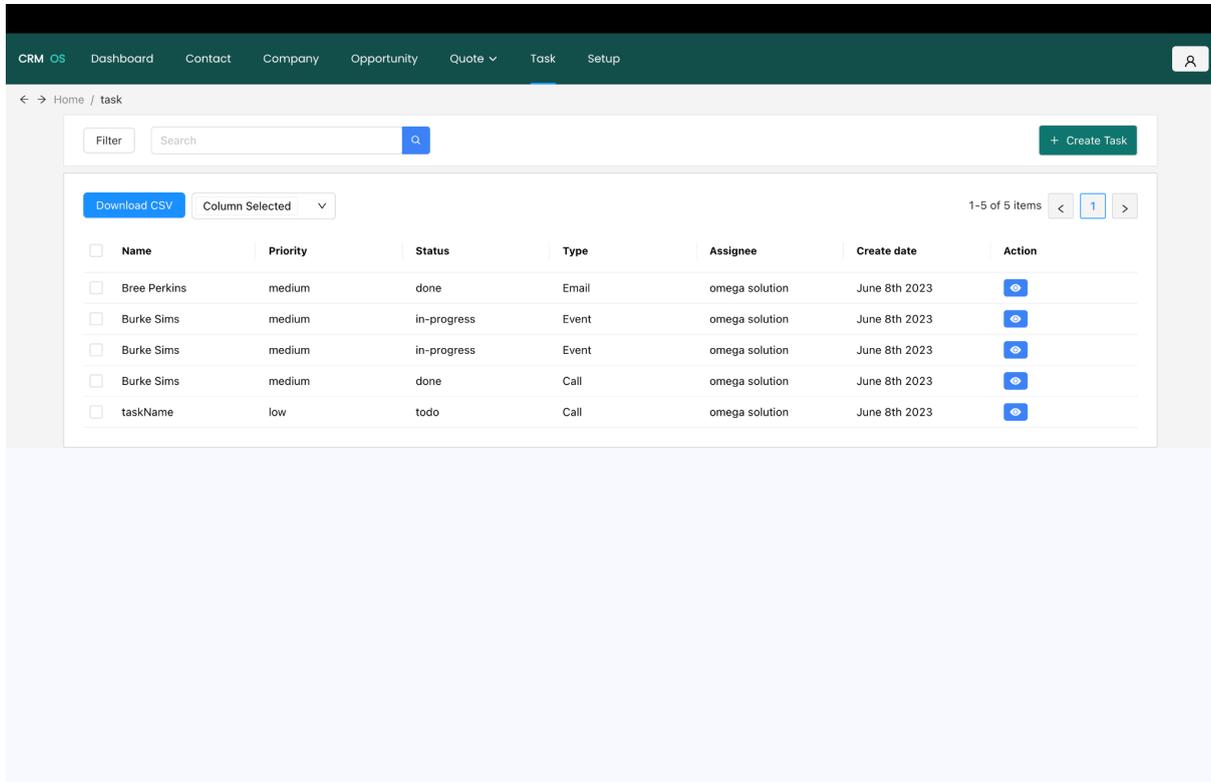
The screenshot shows the CRM interface for Quote Management. The top navigation bar includes CRM OS, Dashboard, Contact, Company, Opportunity, Quote (selected), Task, and Setup. The breadcrumb trail is Home / quote. Below the navigation is a search bar with a 'Filter' button and a '+ Create Quote' button. A table lists quotes with columns: Name, Owner, Quotation Date, Expiration Date, Total Amount, Company, Create Date, and Action. One quote is visible: 'hello' owned by 'omega solution', created on June 8th 2023, expiring on August 24th 2023, with a total amount of 150. The table has pagination controls showing '1-1 of 1 Items' and a 'Download CSV' button.

The screenshot shows the single view page for a quote. The top navigation bar is the same as the list view. The breadcrumb trail is Home / quote / 1. A 'Back' button is on the left. 'Delete' and 'Print' buttons are at the top right. The page is divided into two main sections: 'Quote Information' and 'Price Summary'. The 'Quote Information' section displays: Quote Name: hello, Quote Date: 2023-05-24T14:21:00.000Z, Expiration Date: 2023-08-24T14:21:00.000Z, Quote Stage: Sent, and Terms And Conditions: test. Below this is a table with a 'Description' column containing the text 'test'. The 'Price Summary' section shows: Total Amount: 150 and Discount: 50. A 'Sent' button is located at the top right of the Price Summary section. Below these sections is a 'Product List' table with columns: NAME, Unit Price, Quantity, Total, CREATE DATE(GMT+6), and UPDATE DATE(GMT+6). The table contains two rows of product data.

NAME	Unit Price	Quantity	Total	CREATE DATE(GMT+6)	UPDATE DATE(GMT+6)
POS 2	50	1	50	June 8th 2023	June 8th 2023
POS 2	150	1	150	June 8th 2023	June 8th 2023

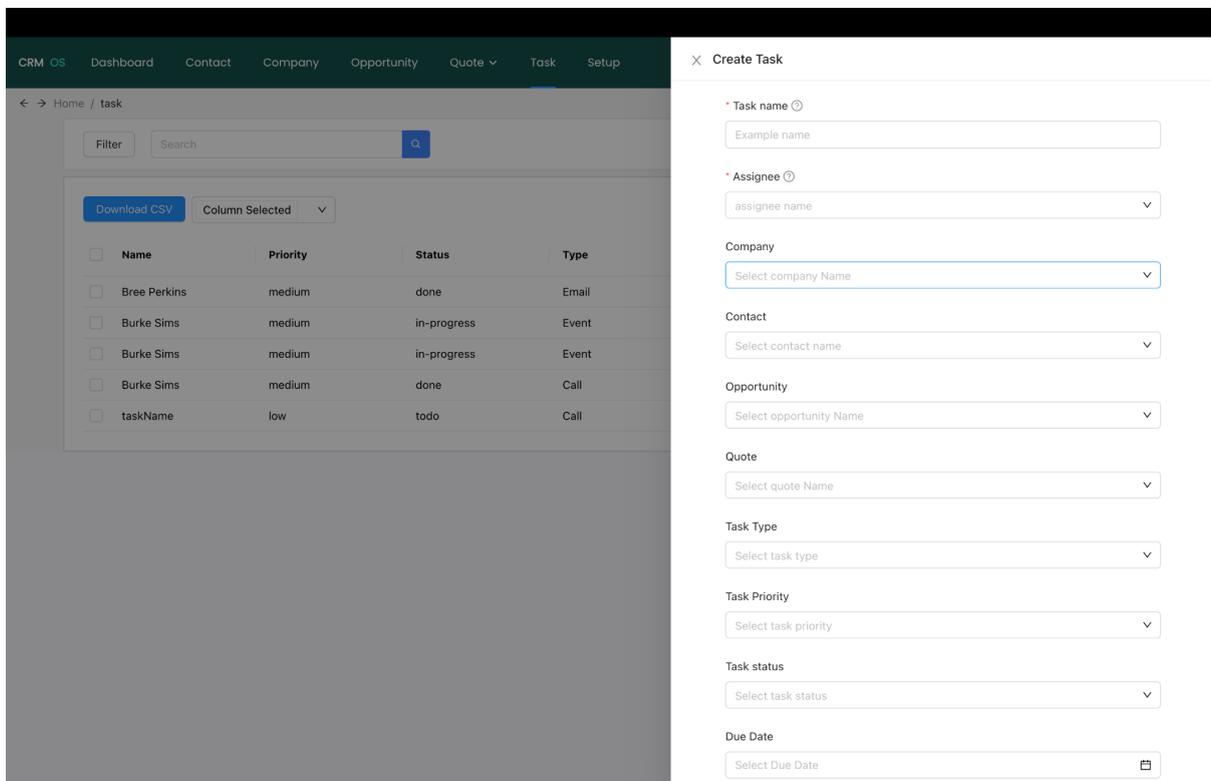
## STEP 08 - Task Management

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.



The screenshot shows the CRM Task Management interface. At the top, there is a navigation bar with the following items: CRM OS, Dashboard, Contact, Company, Opportunity, Quote, Task, and Setup. Below the navigation bar, there is a breadcrumb trail: Home / task. The main content area features a search bar with a 'Filter' button and a search icon. To the right of the search bar is a '+ Create Task' button. Below the search bar, there is a 'Download CSV' button and a 'Column Selected' dropdown menu. On the right side, there is a pagination indicator: '1-5 of 5 items' with navigation arrows and the number '1'. The main content is a table with the following columns: Name, Priority, Status, Type, Assignee, Create date, and Action. The table contains five rows of task data.

<input type="checkbox"/>	Name	Priority	Status	Type	Assignee	Create date	Action
<input type="checkbox"/>	Bree Perkins	medium	done	Email	omega solution	June 8th 2023	
<input type="checkbox"/>	Burke Sims	medium	in-progress	Event	omega solution	June 8th 2023	
<input type="checkbox"/>	Burke Sims	medium	in-progress	Event	omega solution	June 8th 2023	
<input type="checkbox"/>	Burke Sims	medium	done	Call	omega solution	June 8th 2023	
<input type="checkbox"/>	taskName	low	todo	Call	omega solution	June 8th 2023	



The screenshot shows the CRM 'Create Task' modal form. The modal is titled 'Create Task' and has a close button (X). The form contains the following fields:

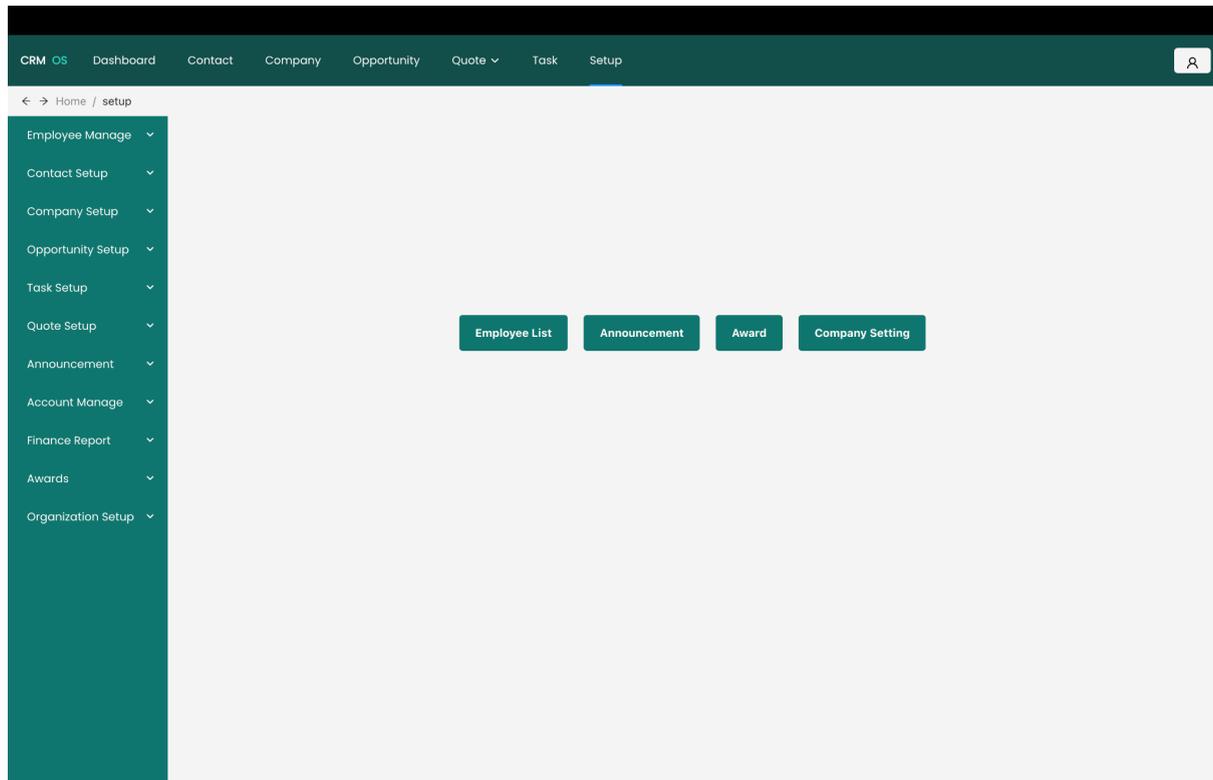
- Task name**: A text input field with a placeholder 'Example name'.
- Assignee**: A dropdown menu with a placeholder 'assignee name'.
- Company**: A dropdown menu with a placeholder 'Select company Name'.
- Contact**: A dropdown menu with a placeholder 'Select contact name'.
- Opportunity**: A dropdown menu with a placeholder 'Select opportunity Name'.
- Quote**: A dropdown menu with a placeholder 'Select quote Name'.
- Task Type**: A dropdown menu with a placeholder 'Select task type'.
- Task Priority**: A dropdown menu with a placeholder 'Select task priority'.
- Task status**: A dropdown menu with a placeholder 'Select task status'.
- Due Date**: A date input field with a placeholder 'Select Due Date' and a calendar icon.

## **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](http://solution.omega.ac)

Email: [solution@omega.ac](mailto:solution@omega.ac)