Natural Cement CRM System

User Guide

A comprehensive overview of system features and navigation

Prepared for: Natural Cement Company

Guide to Using the CRM System

This guide provides a brief overview of the CRM system tailored for Natural Cement Company. It is not a step-by-step manual, but rather a summary of the key features available on each page. For detailed instructions on how to use the system, please refer to the demonstration video sent in the email.

Login

Upon launching the system, the user is directed to the login page. Login credentials are provided for both the user and the administrator accounts. Enter the correct email and password to access the system. Once logged in, you may change your credentials and create additional accounts as needed.

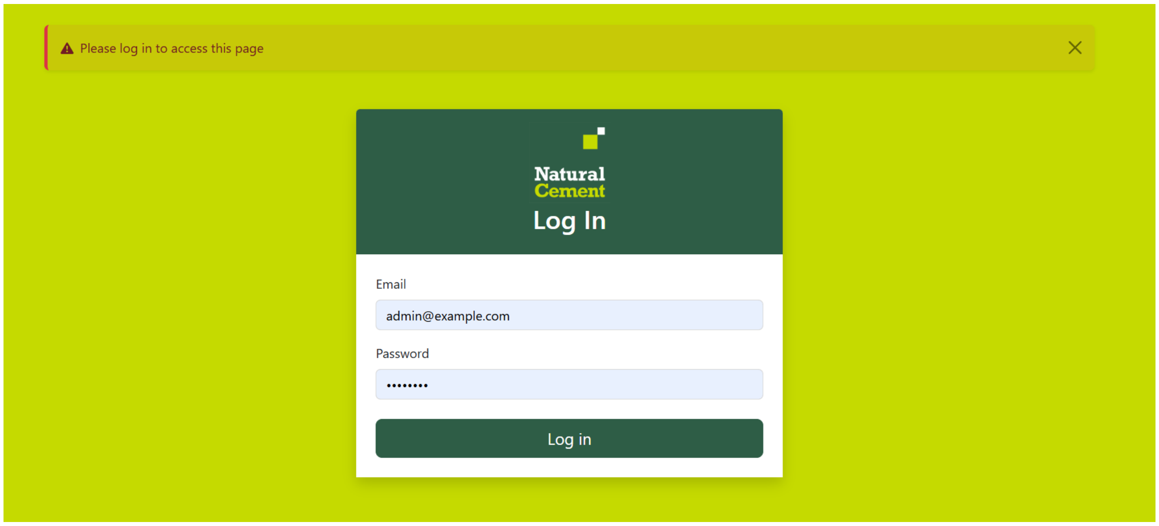

Figure 1: Login Page

Dashboard

After logging in, the user is presented with the dashboard. The sidebar provides access to the Profile page, Customer Hub, Interaction Logs, and Calendar.

The dashboard also offers direct access to User Management and the Customer page. The "Your Recent Activity" panel lists all actions performed by the user within the system, and the "Upcoming Events" panel displays any meetings or events scheduled in the future.

The following is an example of the dashboard interface for an administrator:

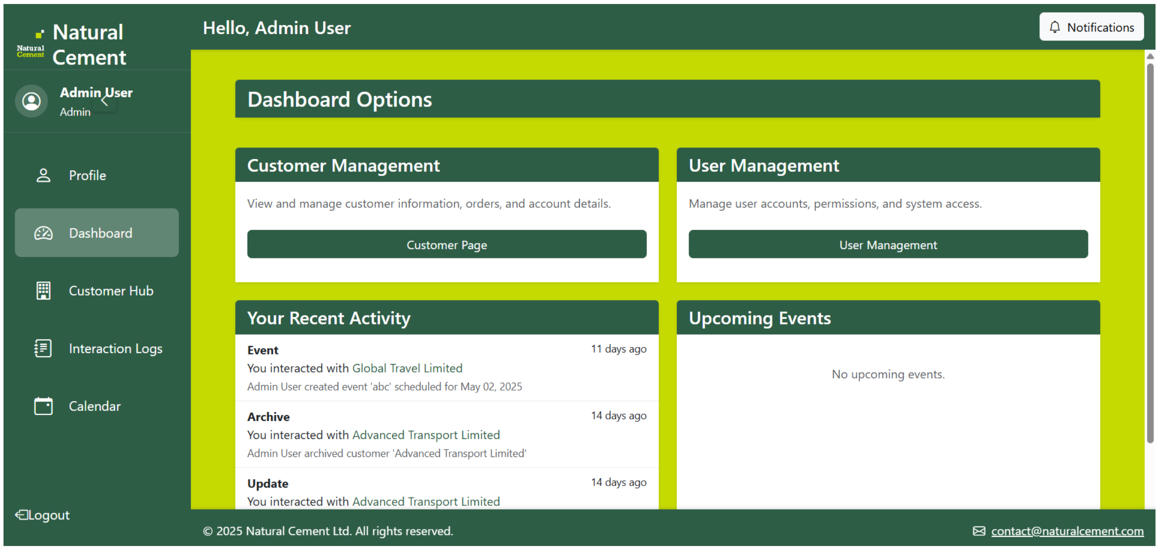

Figure 2: Admin Dashboard

Profile

Selecting "Profile" from the sidebar menu directs the user to the Profile page. From here, the user can update credentials such as name and password. The email address cannot be changed due to security requirements. When the password is updated, the user is logged out and prompted to sign in again with the new password.

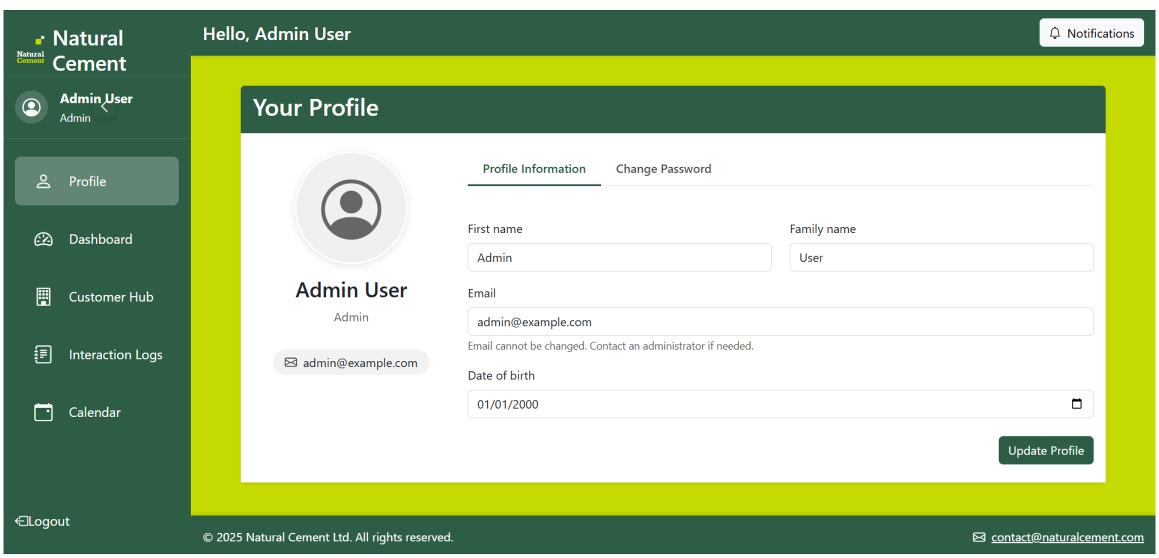

Figure 3: Profile Page

Customer Hub

This page displays all customer records stored in the CRM. Customer data can be exported to a spreadsheet, and new customers can be added directly from this page. A search function is available to locate specific customers, along with filters for industry, location, or business name. Additional features include archiving, flagging, and editing a customer record.

Selecting a customer opens their individual profile, which shows interaction statistics and recent activity. From this view, upcoming calendar events can be added and new notes created.

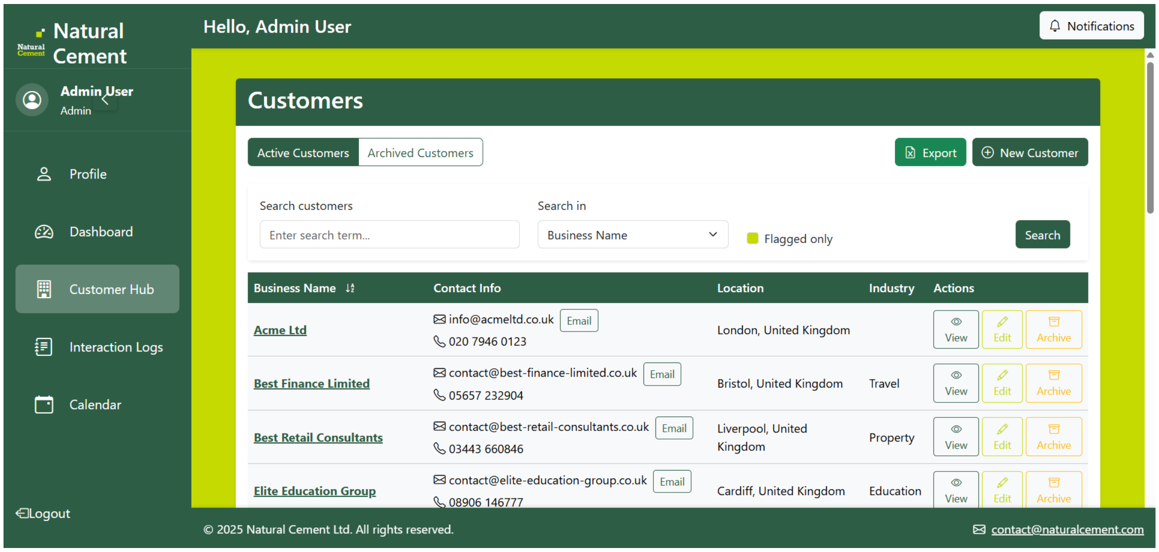

Figure 4: Customer Hub

User Management

This page is exclusive to administrators. It lists all staff accounts registered on the system and allows administrators to edit account credentials or deactivate accounts as required. New administrator and user accounts can be created by clicking the "Add New User" button.

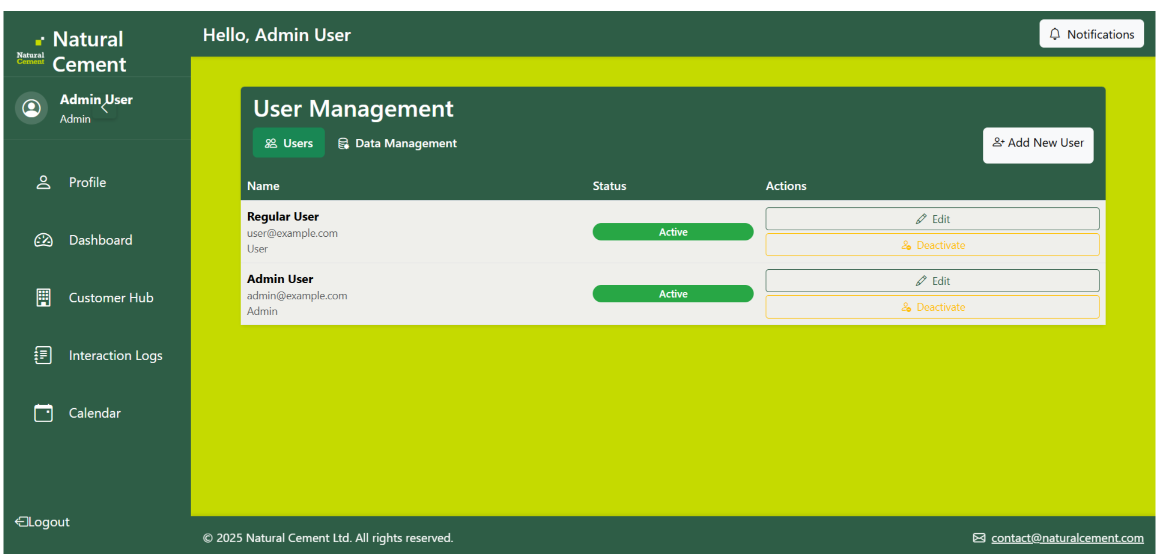

Figure 5: User Management

Data Management

The Data Management page is accessible from the User Management page by clicking the "Data Management" button. Administrators can import an Excel spreadsheet containing new customer information by clicking the "Import Data" button. Full instructions for this process are provided on the page itself.

Imported CSV files can be managed by clicking "View" in the row of that file's process.

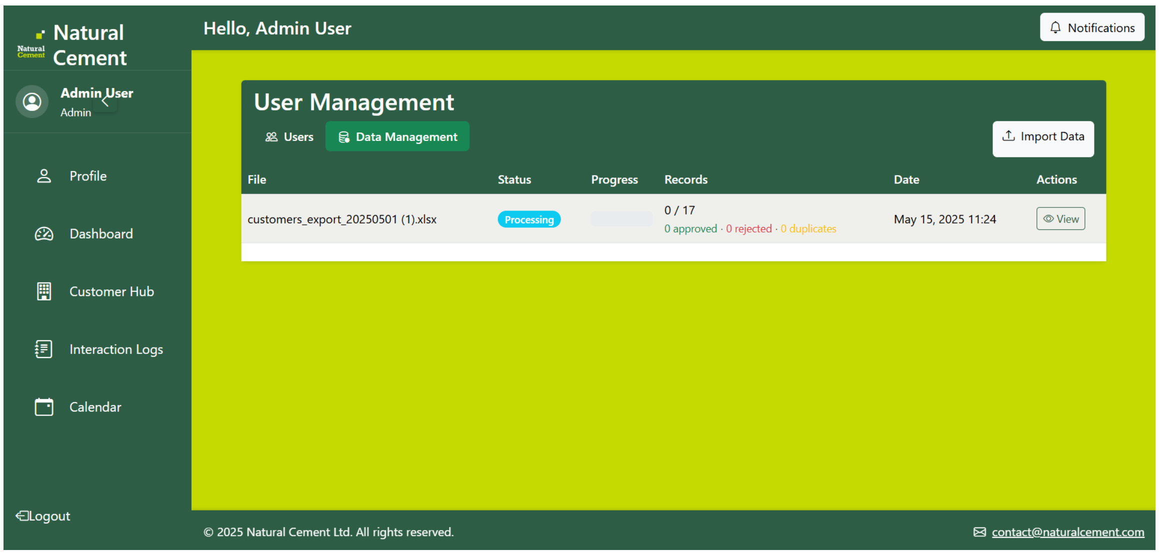

Figure 6: Data Management

Interaction Logs

This page displays the interaction logs for all users on the system, including notes, emails, meetings, and calls. New interactions can also be created here for any customer and will be logged automatically.

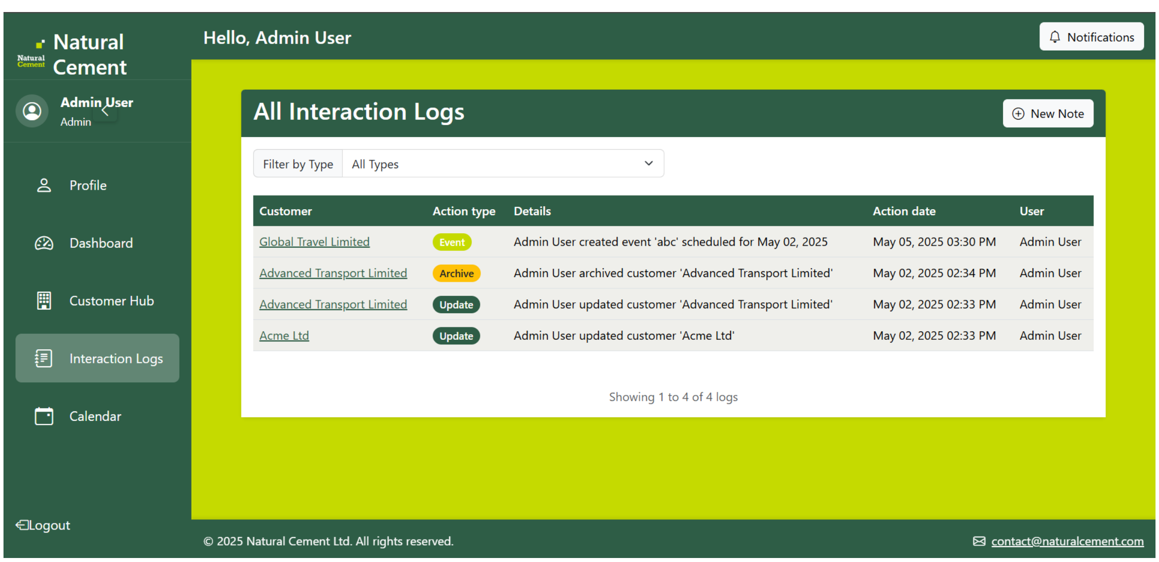

Figure 7: Interaction Logs

Calendar

The internal CRM calendar is viewable on this page and allows the user to create upcoming events. Events scheduled on the calendar automatically generate notifications that alert the user as the event approaches.

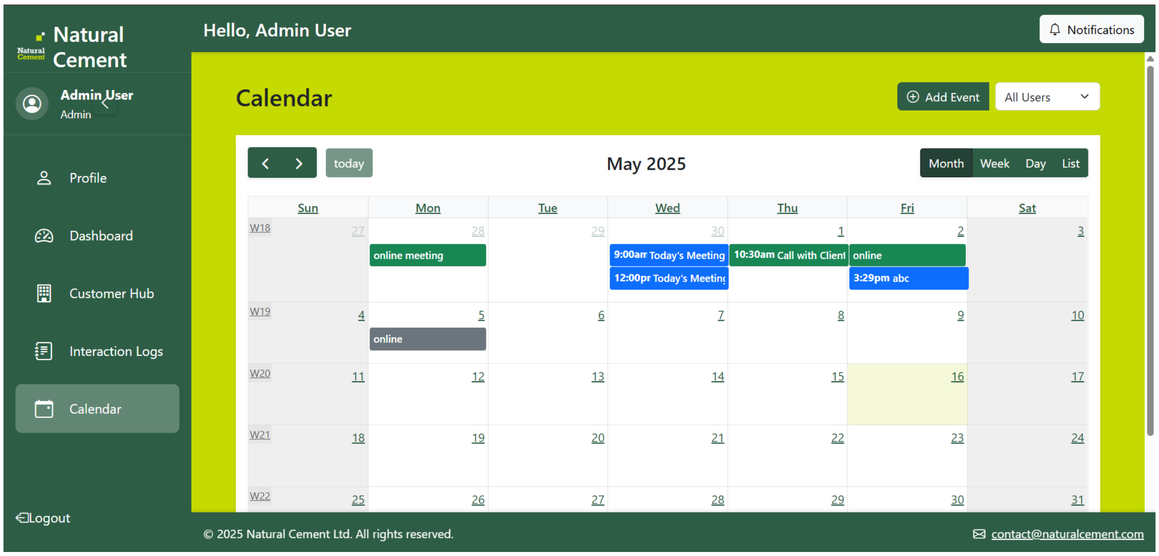

Figure 8: Calendar

Notifications

Users receive notifications for activity related to their account, such as upcoming events and meetings.

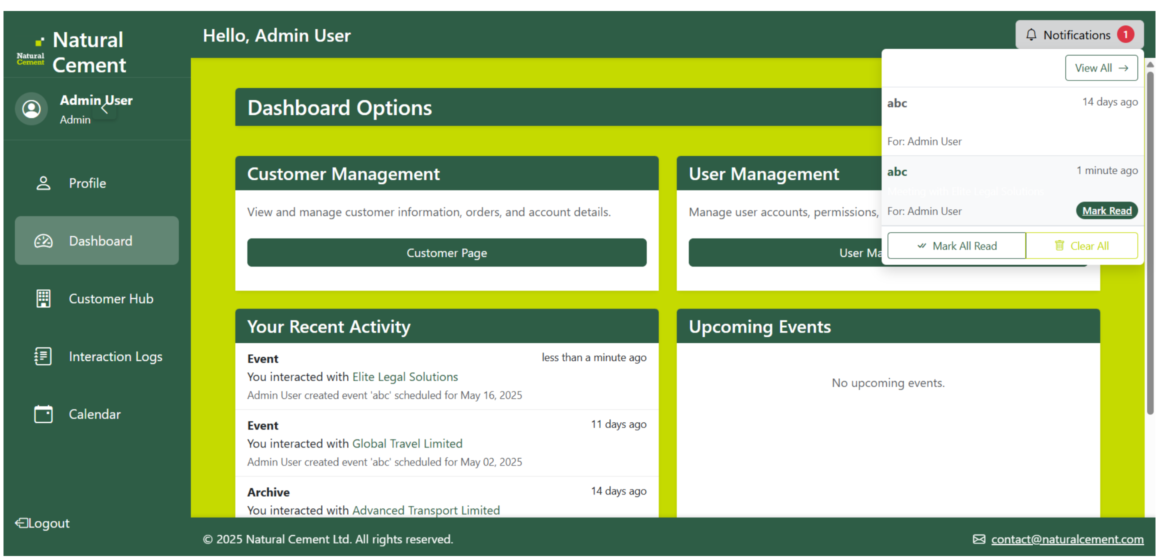

Figure 9: Notification Alert

The notification page lists all notifications the user has received:

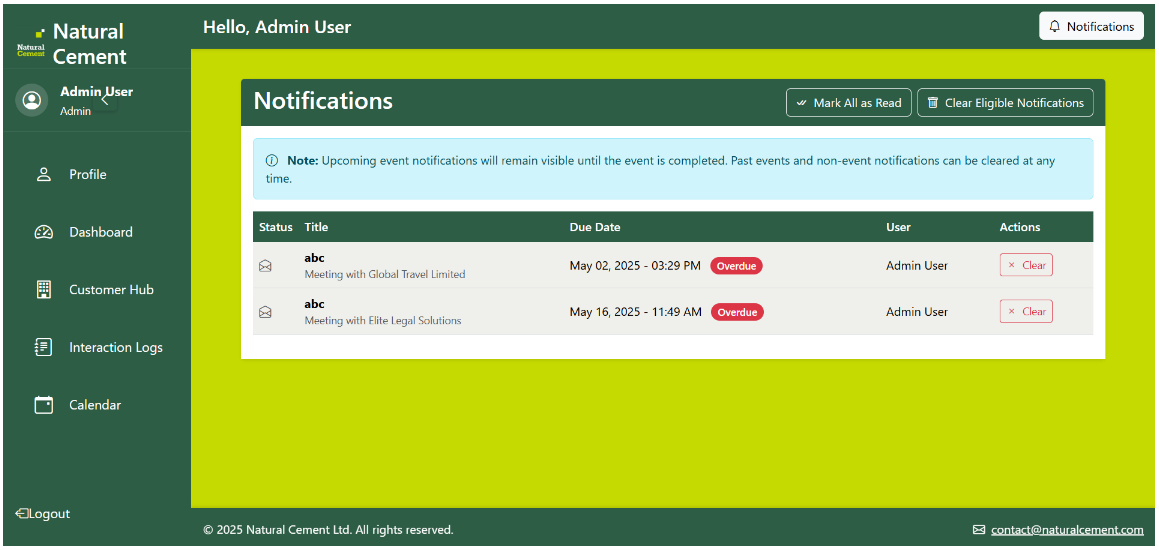

Figure 10: Notifications Page

Clicking "Clear Eligible Notifications" removes notifications that are no longer relevant (those past the current date) from the notification page. Click "Mark All as Read" to acknowledge all notifications.