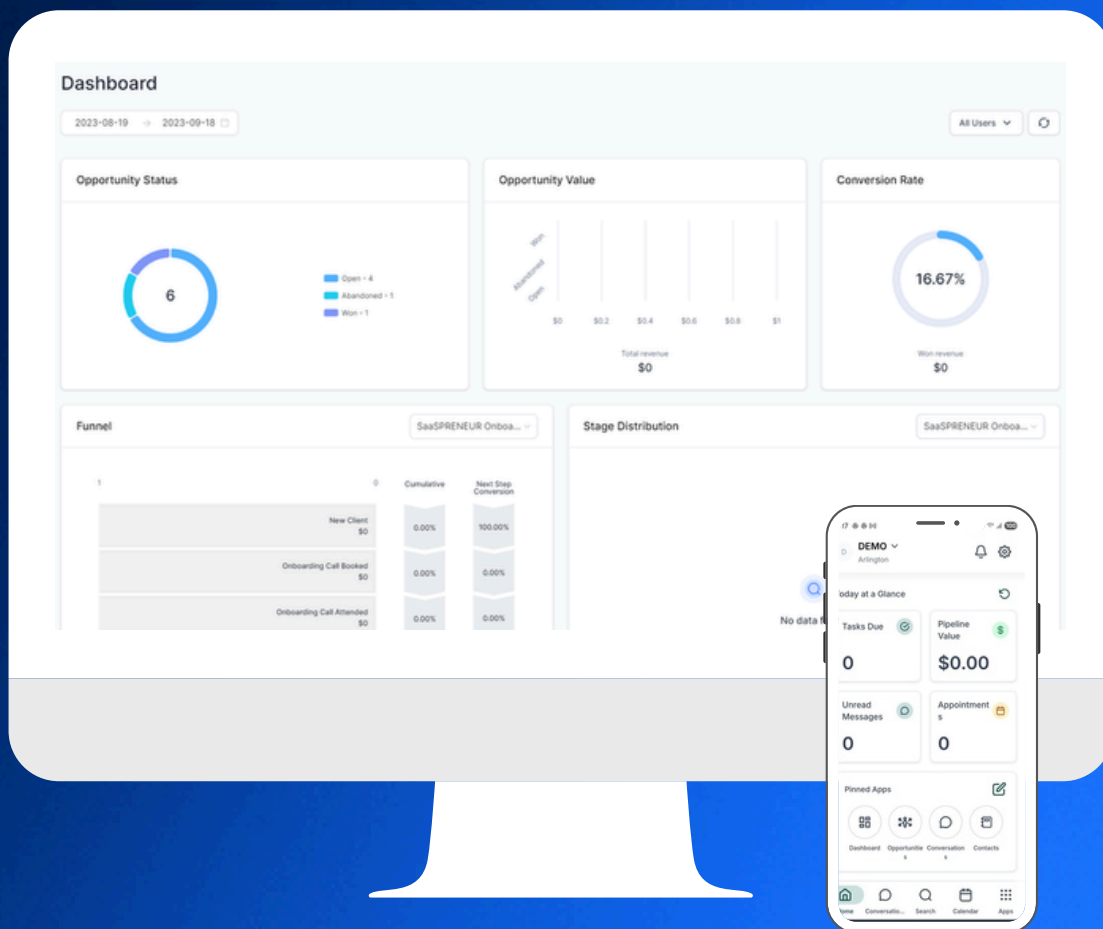


Get to Know Your CRM

For Teams (Users)

REFERENCE GUIDE



Welcome – What Your CRM Is

What It Is

Short for Customer Relationship Management, your CRM is your team's home base for communication and organization. Every conversation, note, task, and opportunity lives in one place, so nothing gets lost to sticky notes or scattered emails.

How It Works For Your Business

- Your admin already set up the account. Your job is learning to use it with confidence, not building it from scratch.
- This course walks through getting around your dashboard, setting up your profile, conversations, contacts, opportunities, your calendar, and mobile.
- Most users feel confident with their CRM within 90 days of finishing this training.
- You get out of it what you put into it. Learning a CRM is a journey, taken one step at a time.

You're not going to break anything by clicking around. Explore freely as you go through this guide.

Getting Around Your Dashboard

What It Is

Your dashboard is a bird's eye view of your whole account: opportunity status, tasks, conversion rates, and anything else your admin has added to it. The search bar at the top is your main way around: search for any feature by name to open it.

How It Works For Your Business

- Log in using the link, username, and password your admin provided.
- Two-step authentication sends a security code roughly every 30 days on a device you use regularly.
- Search for Conversations, Contacts, Opportunities, Calendar, or Settings to open each one.
- A small flashcard icon gives you Quick Actions: add a contact, book an appointment, or create an opportunity in seconds.
- Settings is only for your own profile, password, and connections. You won't need it often.

Getting Around – Tips & Guidelines

Tips

- Every dashboard looks a little different. Your admin customized yours to fit your workflow.
- Search for one feature at a time, then explore left to right inside each feature.
- Don't try to learn every feature today. Get familiar first, then go deep one at a time.
- The dashboard is a bird's eye view, not the full detail. Click into a feature for that.

DO

- Search for each feature at least once to see what's there
- Use Quick Actions when you need to move fast
- Expect your screen to look different from a teammate's
- Come back to Settings only when you actually need to change something

DON'T

- Assume your dashboard should match someone else's exactly
- Try to memorize every feature in your first session
- Worry about breaking something by clicking around
- Skip two-step authentication when prompted on a new device

Setting Up Your Profile

What It Is

Your profile is your personalized corner of the CRM: your photo, your signature, your connected email and calendar, and your working hours. A few minutes here makes the whole system work specifically for you.

How It Works For Your Business

- Add a profile photo and confirm your name, email, and phone number are correct.
- Turn on a signature. It shows automatically on every outgoing message.
- Connect Gmail or Outlook for two-way sync, so sent and received messages match between your CRM and your inbox.
- Connect your calendar next, so bookings block your real schedule.
- Set your weekly working hours, plus buffer time before and after meetings so back-to-back bookings don't run you ragged.

Setting Up Your Profile – Tips & Guidelines

Tips

- If your admin already set up your calendar, you don't need to create a new one.
- Leave "include signature before quoted text" unchecked unless you have a specific reason to turn it on.
- Auto-confirm keeps your calendar moving. Turn it off only if you want to approve every booking yourself.
- Check your notification settings anytime from the bell icon in the top right.

DO

- Add a real photo so contacts feel like they're talking to a person
- Set a pre- and post-buffer time around meetings
- Turn on two-way email sync early, it saves time later
- Review your working hours whenever your schedule changes

DON'T

- Leave your contact info out of date on your profile
- Skip your signature. It's free professionalism on every message
- Forget to connect your calendar before setting your hours
- Enable every notification channel at once without thinking it through

Conversations

What It Is

Conversations is your unified inbox: every message from a client, a lead, or a teammate lands here, no matter the channel. It's built from four working parts: My Inbox / Team Inbox, the message list, the conversation thread, and the contact details.

How It Works For Your Business

- My Inbox shows conversations assigned to you or that you're following. Team Inbox shows the broader account view, based on your permissions.
- Internal Chat is private team-to-team messaging. Contacts never see it.
- Filter by unread, all recents, or starred to find what matters fast.
- Contact details sit right alongside the chat, so you never lose context on who you're talking to.
- You can book an appointment, add a task, or leave a note without ever leaving the conversation.

Conversations – Tips & Guidelines

Tips

- Always reply inside the CRM whenever possible, so your whole team sees the full history.
- Check your inbox daily. It's the fastest way to catch new leads and follow-ups.
- Use tags like "follow up" or "high priority" to filter your messages quickly.
- Click a contact's name inside a conversation to jump straight to their full record.

DO

- Archive conversations instead of deleting them
- Star anything you need to come back to later
- Reply from inside the CRM so the whole team sees it
- Check My Inbox first thing each morning

DON'T

- Delete conversations. You'll want that history later
- Let unread messages pile up for more than a day
- Reply from your personal email or phone when you could reply here
- Forget to tag a conversation that needs follow-up

Contacts

What It Is

Contacts is your CRM's address book, but smarter. Each record holds name, phone, email, notes, appointments, and the full conversation history for that person, all in one place.

How It Works For Your Business

- Add a new contact right away, from desktop or mobile, while the details are still fresh.
- You only need a first name plus an email or phone number to save a contact.
- The Owner is the team member responsible for a contact. Followers are teammates who stay looped in without being the owner.
- Use tags like "new lead" or "follow up" to sort and filter your list.
- Bulk actions let you message, tag, or update several contacts at once.

Contacts – Tips & Guidelines

Tips

- Follow the software top to bottom, left to right. You'll never get lost.
- Use tags consistently so bulk actions and filtering actually work later.
- If someone replies STOP or unsubscribes, the system handles their Do Not Disturb setting automatically.
- Add a note after each interaction so the next person can pick up right where you left off.

DO

- Add yourself as the owner on any contact you bring in
- Fill out tags consistently across your whole list
- Add a quick note after meaningful conversations
- Double-check a contact's info the first time you open their record

DON'T

- Leave the owner field blank on a new contact
- Invent your own one-off tags instead of reusing existing ones
- Let duplicate contacts pile up unchecked
- Skip adding a contact because you're planning to "do it later"

Opportunities

What It Is

Opportunities, also called your pipeline, track where every deal or project stands, from a brand new lead all the way to closed. Think of it as a board of cards moving left to right through your process.

How It Works For Your Business

- A new lead starts every opportunity, whether it came from a website, a form, or a call-in.
- Stage is where the deal sits in your process. Status tells you if it's open, won, lost, or abandoned.
- Switch between Kanban (drag-and-drop cards) and List view (better for bulk updates).
- Every opportunity card holds the dollar value, the owner, tags, and quick-action icons for calling, messaging, or adding a task.
- Lost means they'll never be a good fit. Abandoned means there's still a chance you follow up again later.

Opportunities – Tips & Guidelines

Tips

- Update your pipeline at least weekly. Daily is even better.
- An empty “new lead” column is a good sign. It means you're caught up.
- Use the list view when you need to bulk-update several opportunities at once.
- Every opportunity card has quick-call, message, and task icons, no need to leave the pipeline.

DO

- Move a deal to its next stage as soon as something changes
- Add a dollar value to every open opportunity
- Check for stuck “new lead” cards every time you log in
- Use bulk actions when updating several deals at once

DON'T

- Let a lead sit untouched in “new lead” for days
- Confuse lost (never coming back) with abandoned (maybe later)
- Forget to add yourself as the owner on a deal you're working
- Leave the dollar value blank on a real opportunity

Calendar & Daily Workflow

What It Is

A simple five-minute daily rhythm ties your calendar and your whole CRM together: check conversations, review opportunities, then check your calendar. Repeat it every day and everything stays current.

How It Works For Your Business

- Start each morning by reviewing and responding to new messages.
- Move deals along in opportunities and follow up where needed.
- Switch between day, week, and month views on your calendar to plan effectively.
- Block time off your calendar, like a vacation, so it can't get booked while you're out.
- The system only works when everyone participates and keeps their part of it updated.

Calendar & Daily Workflow – Tips & Guidelines

Tips

- This routine only takes about five minutes once you're in the habit.
- Start every morning with conversations before anything else.
- Blocking time off your calendar keeps it from getting booked while you're out.
- Consistency matters more than speed. A little every day beats a lot once a week.

DO

- Do your five-minute pass at the same time each day
- Block off vacation or personal time as soon as you know about it
- Check your week view to plan a few days ahead
- Keep your notes clear so teammates can follow along

DON'T

- Save your daily check-in for once a week instead
- Leave known time off unblocked on your calendar
- Skip updating opportunities just because you're busy
- Assume someone else will keep your data current for you

Mobile On the Go

What It Is

The mobile app lets you manage your CRM from anywhere: reply to conversations, check contacts, swipe through your pipeline, and view your calendar, all from your phone.

How It Works For Your Business

- Download the app from the Apple or Google Play store and log in with your usual credentials plus a security code.
- Pin your most-used features, like calendar, conversations, contacts, and opportunities, right to your mobile dashboard.
- Scan a business card to turn it into a new contact instantly.
- Notification settings sync between desktop and mobile, so you only need to set them up once.
- Quick response times can increase conversion rates up to 80 percent.

Mobile On the Go – Tips & Guidelines

Tips

- Pin your calendar, conversations, contacts, and opportunities for the fastest access.
- If a contact only gave you an email, you won't see a text option, and the reverse is true for phone-only contacts.
- Business card scanning is one of the fastest ways to capture a new lead on the go.
- Fast replies matter. Quick response times can meaningfully increase conversion.

DO

- Pin your four most-used features to your mobile dashboard
- Scan business cards on the spot instead of typing them in later
- Reply quickly to messages that come in while you're out
- Keep your app updated so notifications sync properly

DON'T

- Let mobile notifications pile up unread for days
- Wait until you're back at your desk to log a new lead
- Assume mobile and desktop notification settings are separate
- Ignore a fast-reply opportunity just because you're away from your desk

Key Terms Glossary

CRM

Your team's home base for every conversation, contact, and deal.

Dashboard

The bird's eye view you land on after logging in.

Two-Step Authentication

An extra login security step using an emailed code.

Quick Actions

The flashcard shortcut for adding a contact, booking, or creating an opportunity fast.

Signature

Text that shows automatically on your outgoing messages.

Two-Way Sync

Connecting your email so incoming and outgoing messages match your CRM.

Buffer Time

Extra minutes blocked before or after a meeting.

Auto-Confirm

A calendar setting that books appointments automatically.

My Inbox / Team Inbox

Your personal conversation view versus the broader team view.

Internal Chat

Private team-to-team messaging, not visible to contacts.

Owner / Follower

Who's responsible for a contact, and who's looped in alongside them.

Tag

A label like "new lead" used to sort and filter contacts.

Pipeline / Stage / Status

The path a deal follows, where it sits, and whether it's open, won, lost, or abandoned.

Kanban View

The drag-and-drop card view of your pipeline.

Block Time

Marking off time on your calendar so it can't be booked.

Pinned Apps

The features you've chosen to show on your mobile dashboard.

Your Daily Rhythm & Getting Help

1

Check Conversations

Review and respond to new messages first thing every morning.

2

Review Opportunities

Move deals along, follow up where needed, and keep your new lead column empty.

3

Check Your Calendar

See what's ahead today, this week, and this month.

4

Update As You Go

A five-minute habit throughout the day keeps everything accurate.

You get out of it what you put into it. The system only works when everyone participates, and that's where you shine.

Getting Help

- Keep this guide close as you work through the course, and come back to it anytime you need a refresher.
- Remember, you're not going to break anything. Explore, click around, and give yourself a little time each day.
- If you have questions your admin can't answer, reach out to your support team for help.