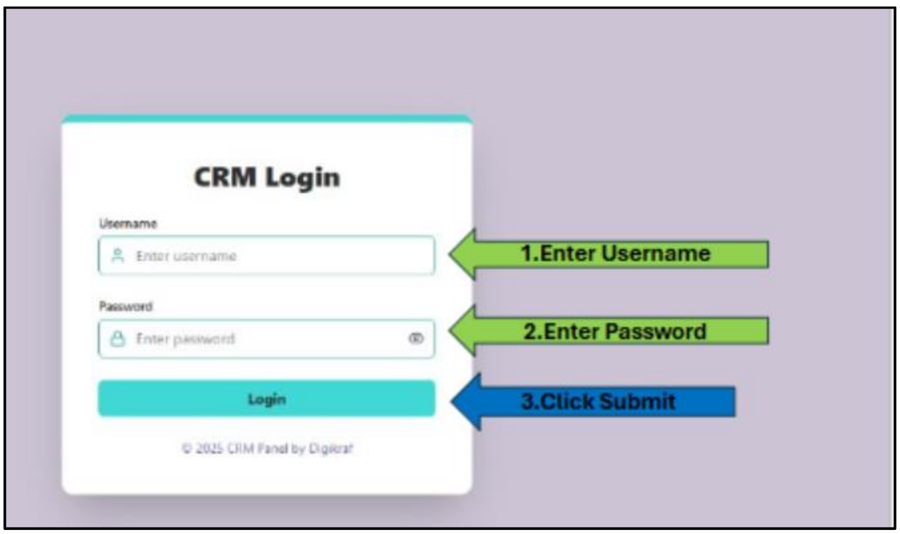
# CRM Help Guide

## Access: https://shreenathmobis.in/Navnit-CRM/

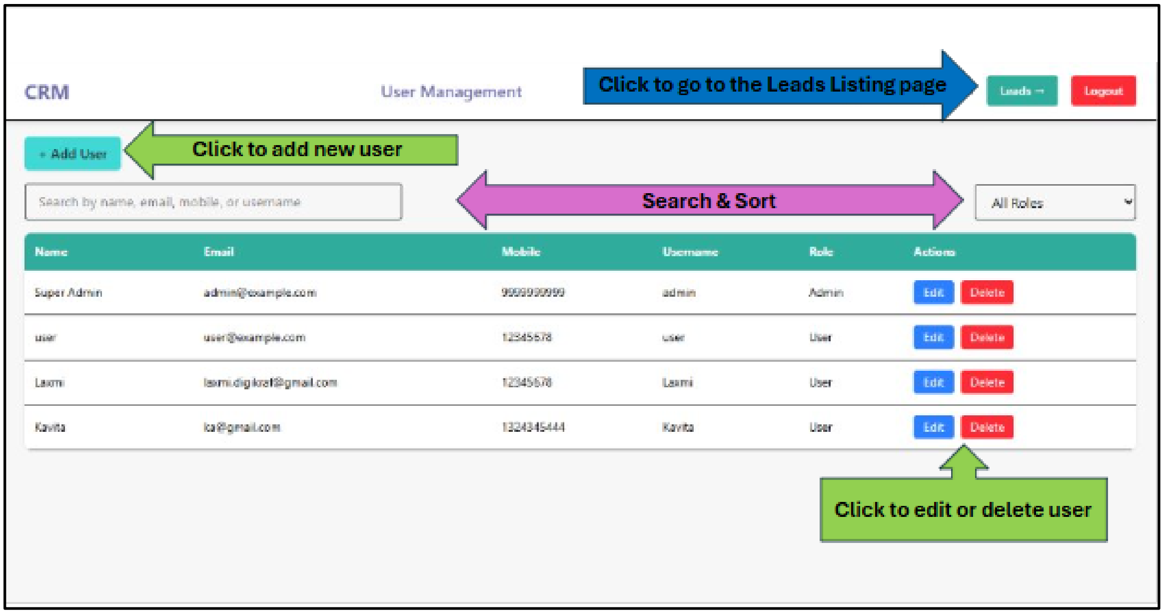
### 1. Login

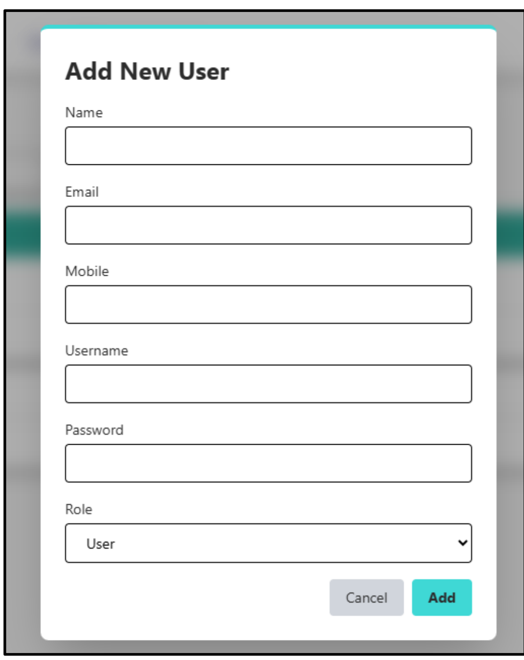
• Go to the login page.
• Enter Username and Password.
• Click Login.
• After login you will redirect to Leads Page (if User) or User Management Page (if Admin)

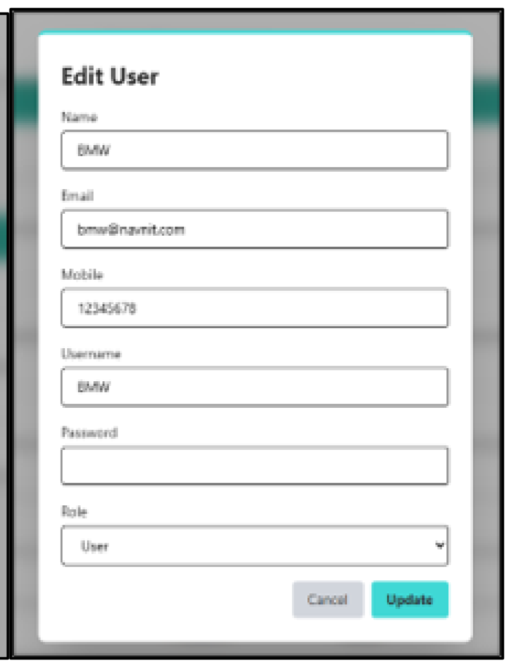



## 2. User Management (Only Admin)

• After login, you land on the user management page.
• View all users with columns for Name, Email, Mobile, Username, Role.
• You can:
 - Add User
 - Edit existing users
 - Delete users



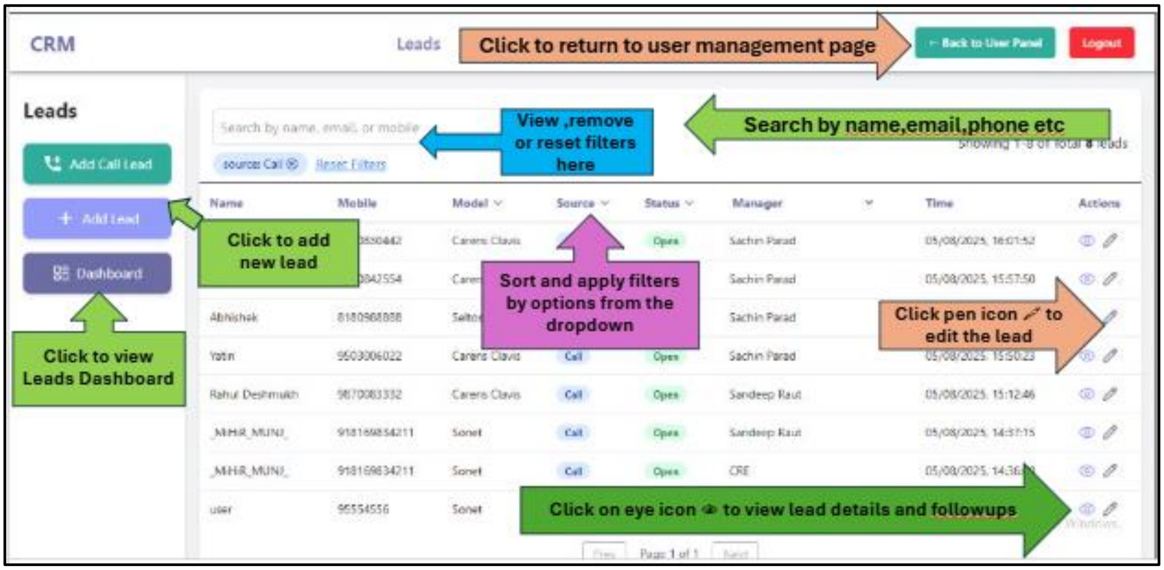




## 3. Leads Page

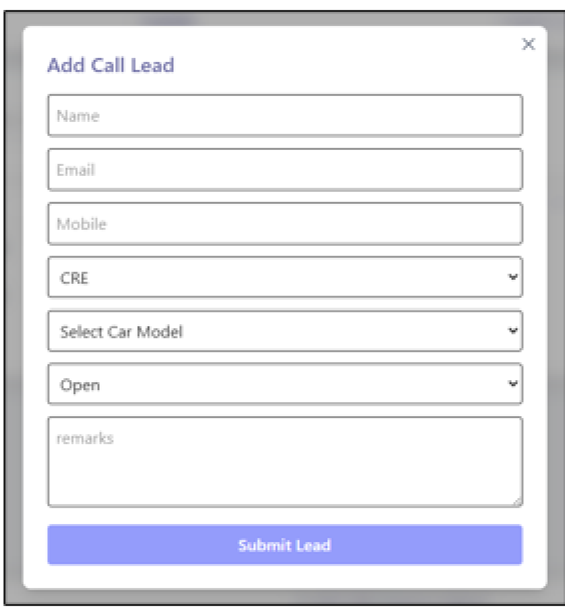
- Click on Leads button in top right corner to go to the Leads dashboard.
- View leads with Name, Mobile, Email, Source, Status, Manager, and Time.
- Use the search bar to filter by name, email, or mobile.
- Use filters (source, status, manager) to narrow results.
- You can:
  - Add a Call Lead or Webform Lead

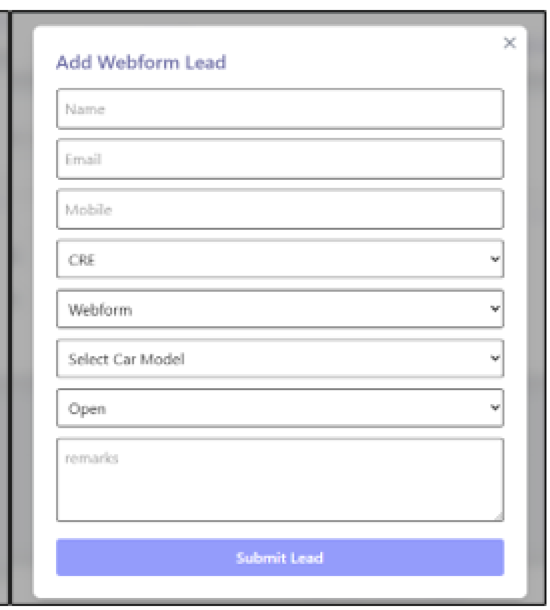
- View lead details (👁 icon)
- Edit leads (✏️ icon)




## 4. Add New Lead

- Use the sidebar buttons:
  - Add Call Lead – for phone inquiries.
  - Add Lead – for webform or manual entries.
- Fill in required fields and click Submit Lead.



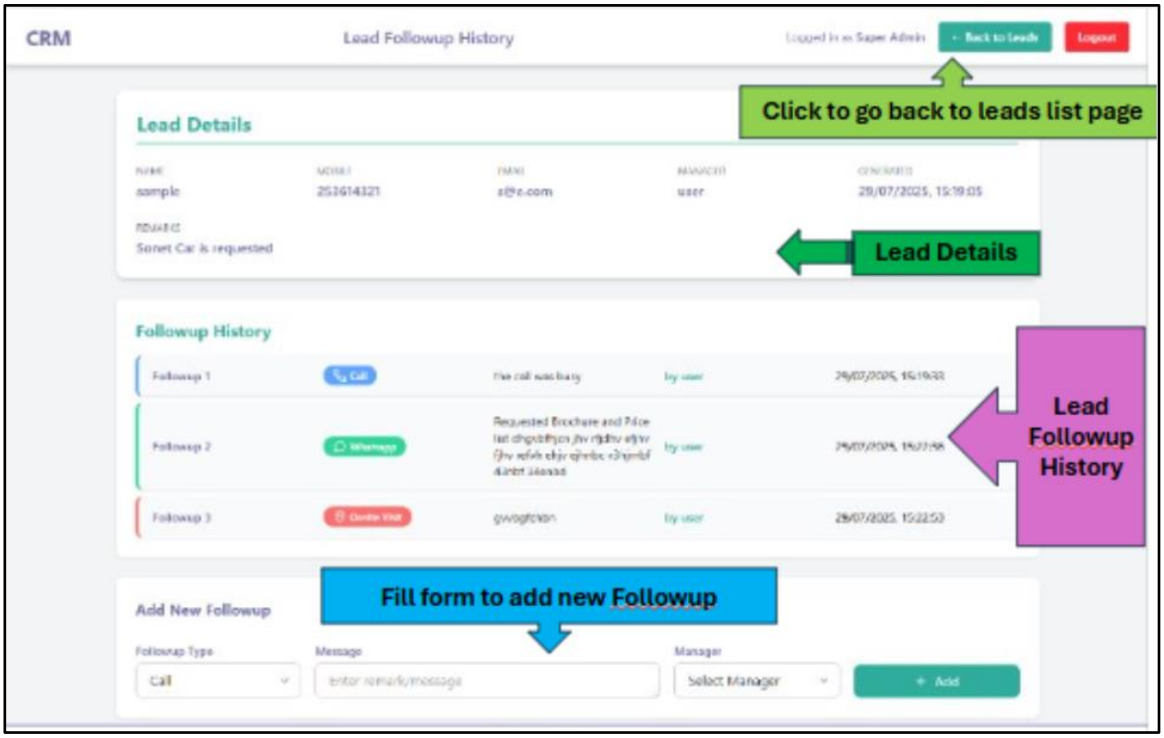

## 6. Edit Leads

• On the Leads page,only Admins can see the ✏️ Edit icon in the Actions column.
• Click it to:
- Update lead info (name, email, mobile, manager, status)
- Add/edit remarks
• Click Submit Lead to save.


## 5. View Lead & Followups

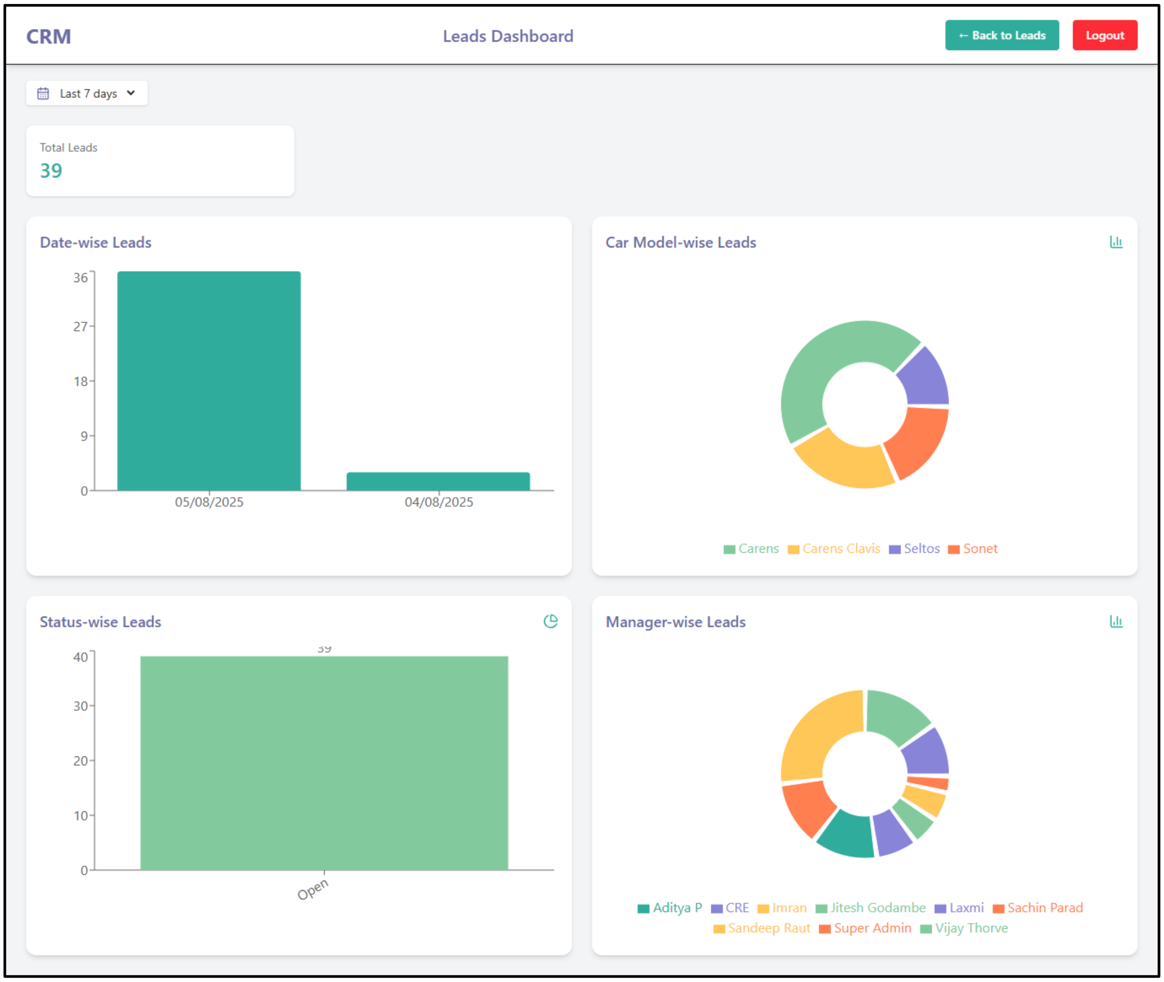
• Click the 👁 View icon to open full lead details.
• You'll see:
- Lead information (Name, Mobile, Email, etc.)
- Past followups (Call, WhatsApp, Onsite)
• Scroll to the bottom to add a followup:
- Select type (Call/WhatsApp/Visit)
- Enter message
- Select manager

- Click + Add




## 6. Leads Dashboard Page

- Click the Dashboard Button on Leads Listing page to access Leads Dashboard
- On dashboard page you will see :
    1. Date Wise Leads Bargraph
    2. Model Wise Leads Piechart (& Bargraph)
    3. Status Wise Leads Bargraph **(&** Piechart)
    4. Manager Wise Leads Piechart (& Bargraph)
- There is button in top right corner of diagram to switch between Pie-chart and Bar-graph.




## 7. Logout

- Click the red Logout button at the top-right.