

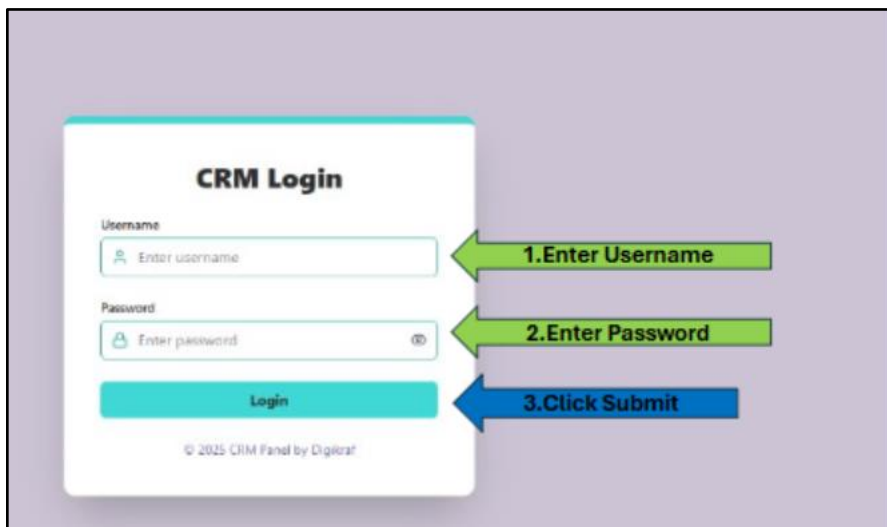
# CRM Help Guide

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**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

CRM User Management

Click to go to the Leads Listing page

Leads -- Logout

+ Add User Click to add new user

Search by name, email, mobile, or username Search & Sort All Roles

Name	Email	Mobile	Username	Role	Actions
Super Admin	admin@example.com	999999999	admin	Admin	Edit Delete
user	user@example.com	12345678	user	User	Edit Delete
Laxmi	laxmi.dig.kref@gmail.com	12345678	Laxmi	User	Edit Delete
Kavita	ka@gmail.com	1324345444	Kavita	User	Edit Delete

Click to edit or delete user

### Add New User

Name

Email

Mobile

Username

Password

Role

Cancel Add

### Edit User

Name

Email

Mobile

Username

Password

Role

Cancel Update

### 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)

The screenshot shows the CRM Leads management page. It includes a sidebar with buttons for 'Add Call Lead', '+ Add Lead', and 'Dashboard'. The main area features a search bar, a table of leads, and a 'Back to User Panel' button. Callouts provide instructions: 'Click to return to user management page' points to the top right; 'Search by name, email, phone etc' points to the search bar; 'View, remove or reset filters here' points to the 'Reset Filters' button; 'Click to add new lead' points to the '+ Add Lead' button; 'Sort and apply filters by options from the dropdown' points to the 'Source' dropdown; 'Click pen icon to edit the lead' points to the edit icon in the actions column; and 'Click on eye icon to view lead details and followups' points to the eye icon in the actions column.


Name	Mobile	Model	Source	Status	Manager	Time	Actions
	9500442	Carers Clavis	Call	Open	Sachin Parad	05/08/2025, 16:01:52	👁 ✎
	9542554	Carers			Sachin Parad	05/08/2025, 15:57:50	👁 ✎
Abhishek	8180968888	Seltor			Sachin Parad	05/08/2025, 15:50:23	👁 ✎
Yatin	9503006022	Carers Clavis	Call	Open	Sachin Parad	05/08/2025, 15:12:46	👁 ✎
Rahul Deshmukh	9870063332	Carers Clavis	Call	Open	Sandeep Raut	05/08/2025, 14:57:15	👁 ✎
_MHR_MUNI_	918169854211	Sonet	Call	Open	Sandeep Raut	05/08/2025, 14:36:00	👁 ✎
_MHR_MUNI_	918169834211	Sonet	Call	Open	CRE	05/08/2025, 14:36:00	👁 ✎
user	95554556	Sonet					👁 ✎

#### 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.

The image shows two side-by-side screenshots of lead entry forms. The left form is titled 'Add Call Lead' and contains fields for Name, Email, Mobile, CRE (dropdown), Select Car Model (dropdown), Open (dropdown), and remarks. The right form is titled 'Add Webform Lead' and contains fields for Name, Email, Mobile, CRE (dropdown), Webform (dropdown), Select Car Model (dropdown), Open (dropdown), and remarks. Both forms have a 'Submit Lead' button at the bottom.

#### 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.



The image shows a modal window titled "Update Webform Lead" with a close button (X) in the top right corner. The form contains the following fields and controls:

- Text input field: "Sample"
- Text input field: "New@gmail.com"
- Text input field: "95554556"
- Dropdown menu: "CRE" (with a downward arrow)
- Dropdown menu: "Webform" (with a downward arrow)
- Dropdown menu: "Model 2" (with a downward arrow)
- Dropdown menu: "Open" (with a downward arrow)
- Text input field: "Sample lead 2"
- Blue button: "Submit Lead"

## 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

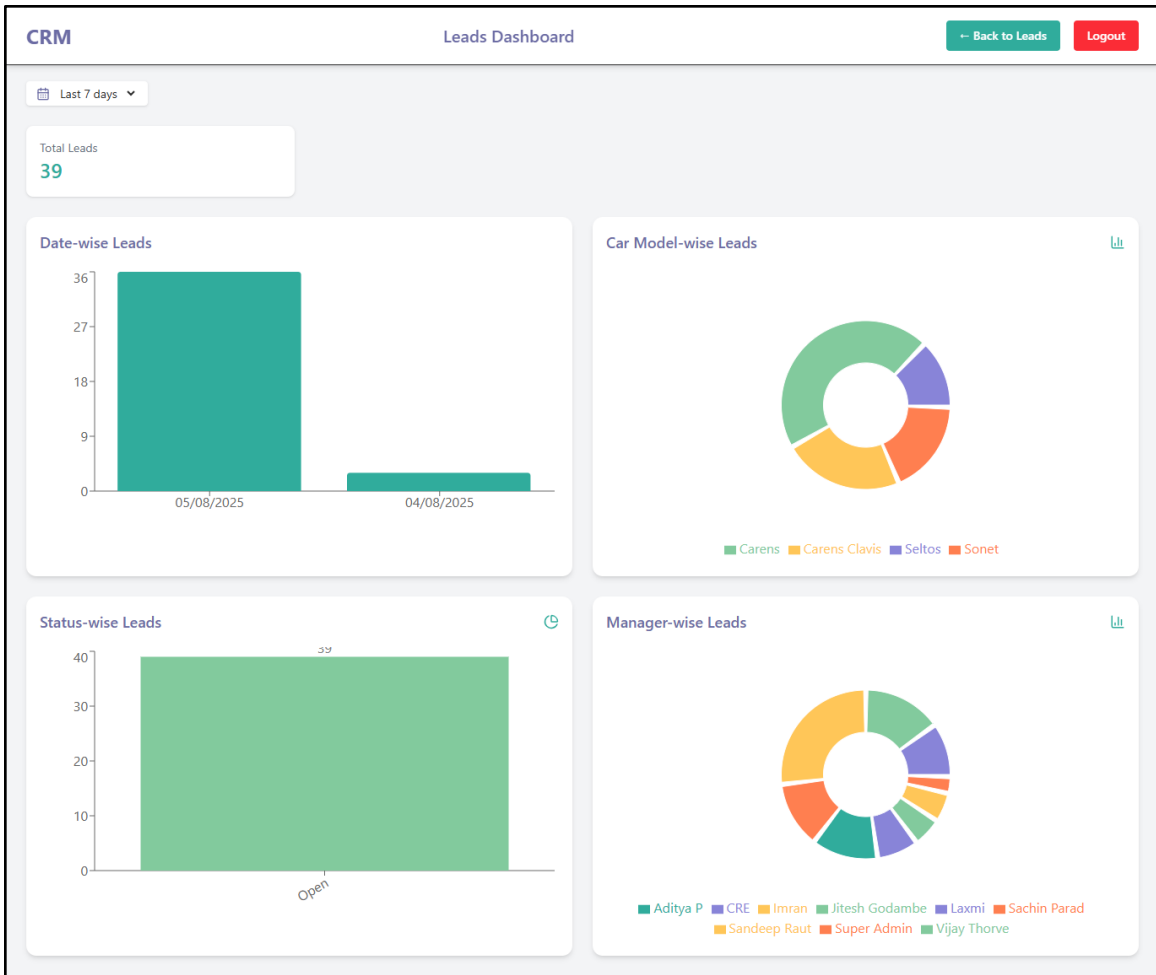
- Click + Add

The screenshot shows the CRM interface for 'Lead Followup History'. At the top right, it indicates the user is logged in as 'Sagar Admin' and provides buttons for 'Back to Leads' and 'Logout'. The main content is divided into three sections:

- Lead Details:** A table with columns for NAME, MODEL, EMAIL, MANAGER, and CREATED. The data row shows 'sample', '251614321', 's@e.com', 'user', and '29/07/2025, 15:19:05'. Below the table, the remark 'Sorent Car is requested' is visible. A green arrow points to the 'Back to Leads' button with the text 'Click to go back to leads list page'. Another green arrow points to the 'Lead Details' table with the text 'Lead Details'.
- Followup History:** A list of three followup entries. Each entry includes a type (Call, Whatsapp, Create Mail), a description, the manager ('by user'), and a timestamp. A purple arrow points to this section with the text 'Lead Followup History'.
- Add New Followup:** A form with fields for 'Followup Type' (set to 'Call'), 'Message' (with placeholder 'enter remark/message'), and 'Manager' (with 'Select Manager' dropdown). A green '+ Add' button is at the bottom right. A blue arrow points to this form with the text 'Fill form to add new Followup'.

## 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 Bargraph.



## 7. Logout

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

