CRM Software Feature Walkthrough

This document provides an overview and step-by-step guide for major features of the CRM software.

1. User Onboarding

1. Navigate to the registration page.
2. Fill out personal and organization details.
3. Verify email address to activate the account.
4. Log in to access the dashboard.

2. Contacts Management

Key Features

- Add, import, and export contacts
- Edit or merge duplicate contacts
- Filter and search contacts

How to Add a New Contact

1. Go to `Contacts` tab.
2. Click Add Contact at the top right.
3. Fill in contact details.
4. Click Save to store the record.

3. Pipeline Management

- Customize sales stages
- Drag-and-drop deals between stages
- Track deal progress and value

Adding a New Deal

1. Navigate to `Pipeline` view.
2. Select New Deal.
3. Complete deal information and assign contacts.
4. Save to add to the pipeline.

4. Task & Activity Tracking

- Assign tasks to yourself or teammates
- Set due dates and reminders
- Log calls, notes, meetings

5. Reporting & Analytics

- View customizable dashboards
- Export reports as CSV or PDF
- Schedule regular email reports

6. Settings & Integration

Integration	Description

Email Sync	Connect your email for direct communication from CRM.
Calendar	Sync tasks and events with Google/Outlook.
API Access	Enable third-party integrations using REST APIs.

7. Support & Resources

- User documentation
- Live chat & email support
- FAQ and community forums