CRM Troubleshooting and Support Training Reference

1. Common CRM Issues

- Login or Authentication Errors
- Data Synchronization Failures
- Slow System Performance
- Missing or Incorrect Data
- Email Integration Problems
- Access or Permissions Issues

2. Troubleshooting Steps

1. Identify and confirm the issue reported.
2. Replicate the problem if possible.
3. Check user permissions and roles.
4. Clear browser cache and cookies (if web-based).
5. Review recent changes or updates in the CRM.
6. Consult system logs or error messages.
7. Search the knowledge base for similar cases.
8. If unresolved, escalate to technical support team.

3. Information to Collect Before Escalation

- User details (name, department, role)
- CRM module or area affected
- Steps to reproduce the issue
- Screenshots or error messages
- Time and date of occurrence
- Browser and device details (if applicable)

4. Sample Troubleshooting Log

Date	User	Issue	Status	Notes
2024-06-04	John Smith	Cannot login	Resolved	Password reset performed
2024-06-05	Jane Doe	Leads not visible	Escalated	Permission issue, sent to IT

5. Contact & Escalation Procedures

1. Attempt initial troubleshooting as per above steps.
2. Document all attempted solutions and findings.
3. Submit a detailed support ticket if issue persists.
4. Notify supervisor if issue impacts multiple users or critical business processes.

Quick Reference

- **Support Email:** support@company.com
- **System Status:** https://status.company.com
- **Internal KB:** https://kb.company.com/crm-support