Modular CRM Task-Specific Training Document

Module: Contact Management

1. Adding a New Contact

1. Navigate to the "Contacts" tab in the top menu.
2. Select the "Add Contact" option.
3. Fill in all required fields (Name, Email, Phone, etc.).
4. Click "Save" to create the new contact record.

Tips

- Double-check email addresses for accuracy.
- Use consistent formatting for names and phone numbers.

Module: Task Assignment & Tracking

2. Assigning a Task

1. Go to the relevant contact or opportunity record.
2. Click on the "Tasks" section and select "New Task."
3. Enter task details, due date, and assignee.
4. Click "Assign" to notify the responsible team member.

Best Practices

- Set clear due dates and priority levels.
- Use descriptive titles for easy search and tracking.

Module: Sales Pipeline Updates

3. Updating Opportunity Status

1. Open the "Sales Pipeline" view from the navigation menu.
2. Click on an opportunity to view details.
3. Update the stage or status as required (e.g., "Negotiation", "Closed Won").
4. Click "Update" to save changes.

Status	Description
Prospecting	Initial contact with potential client
Qualification	Assess needs and fit for service
Negotiation	Discuss terms and finalize details

Closed Won	Deal successfully completed
Closed Lost	Opportunity not pursued

Module: Notes & Documentation

4. Adding Notes to Records

1. While viewing a contact or opportunity, scroll to the "Notes" section.
2. Click "Add Note."
3. Type your note and click "Save."

Guidelines

- Document all significant interactions and decisions.
- Summarize meetings, calls, and next steps clearly.

Module: Reporting

5. Running Reports

1. Navigate to the "Reports" section in the CRM.
2. Select the appropriate report template (e.g., Sales Performance, Overdue Tasks).
3. Apply filters as needed and click "Generate."
4. Download or share the report as required.