# Automation CRM

## User Manual

## for

## Reseller

Version 1.1

Dated 1st April 2011

# Index

Norbell CRM has been developed as a complete business management solution. It is a powerful, easy-to-use web-based solution to manage your sales and billing processes, customer service, and marketing and reseller management.

It has got multiple modules e.g. Suppliers, Products & Services, Resellers, Accounts, Reports, Support etc. Norbell can create accounts for its Resellers on the system and then the Resellers can manage their own business from this CRM too. Resellers can create their own user accounts and assign desired permission(s) for accessing different modules.

# CRM login Page

**URL: www.onlinedemo.in/newcrm/**
**User: jay**
**Password: xxxxxx (**password will be provided separately)



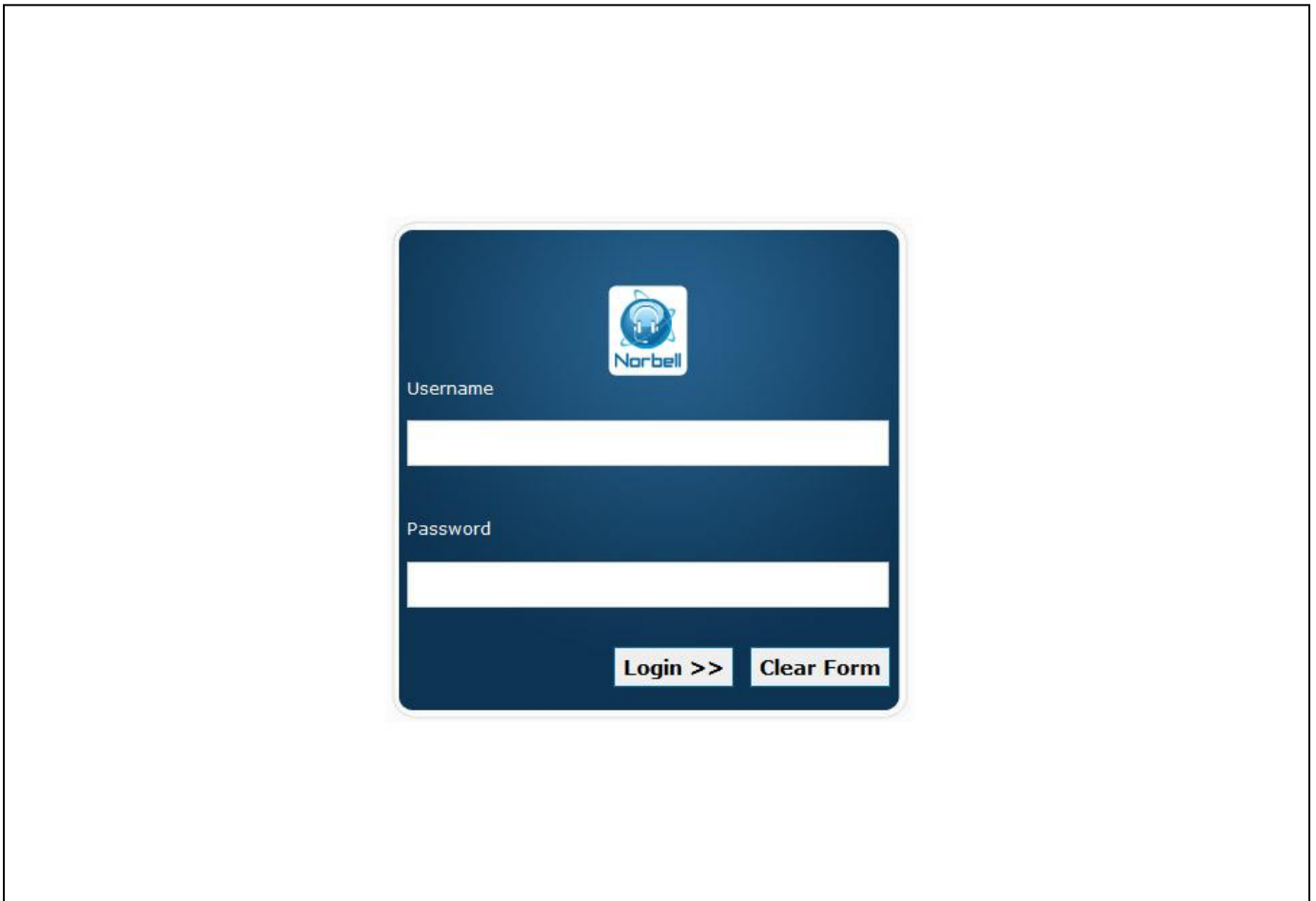**Figure 1 : Norbell CRM Log in Page**

# CRM Dash Board

We have the access to all the modules from the dashboard



**Figure 2 : Norbell CRM Dash Board**

## Norbell Reseller Login

After login user lands on CRM Dash board. On Dash board you can see statistics, latest open tickets and navigation links to manage different section of CRM. You can click on any counts to view details under statistics section.

## Main Navigation

**Reseller –** This can be used to view the list of Resellers, manage their profile, their Sub Resellers, Users, Agents, Package, Retail Package etc.

➢ **Resellers –** This is the list of Resellers. After selection of any one from this list you can use following options

- **Profile** – By using this option you can view or update profile of selected Reseller
- **Sub-Reseller** – List, Add, Modify and Remove sub-reseller. You can view or modify details information of any sub-reseller.
- **Users** – List, Add, Modify and Remove users. You can view or modify details information of any sub-reseller. Any Type of user like Admin, Agent, Manager and Operator can be added from here.
- **Agents -** List, Add, Modify and Remove Sales Agents. You can view or modify details information of any selected Sales Agent.
- **Members -** List, Modify and Remove Member. You can view or modify details information of any selected Member. You can search member based on any field like membership no, first name, last name, email Id etc
- **Retail Packages -** List, Add, Modify and Remove Product Retail Packages. You can view or modify details information of any selected Retail Package. Retails Package is used to sale others.

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## Reseller Profile

Reseller can modify his own profile and can also update any other reseller's profile by clicking on the reseller in the left-panel.



**Figure 2: Reseller Profile**

## Sub Reseller
Reseller can also Add/Modify any Sub-Reseller Profile from this tab.



**Figure 4: Add Sub Reseller**

## Users

This section will show a list of Users (Admin/Operators/Managers) and Customer Service Agents



**Figure 5: User List**

## Agents

When a reseller creates a Sale Agent from the Users tab, the list of the Sale Agents will be displayed under Agents tab. Reseller can assign Retail Packages to Agents and can modify their profile from here.



**Figure 6: Agent List**

## Members

Selecting this tab will display a list of Members of the selected Reseller. Resellers can directly send emails to this member and check his/her status history from here



**Figure 7: Member List**

## Retail Packages

Retail Packages can be created with the Packages which are allocated to this Reseller. While creating Retail Packages we can set Actual Retail Price and Sale Agent Commission.



**Figure 8: Select Package (Step - 1)**



**Figure 9: Add New Retail Package (Step - 2)**

**Reports** – In this section you can generate reports for Member Info Summary/Details, Reseller Info Summary/Details, Sales (Act/Can), Wholesales Summary/Details; Sale forecast Summary/Details, Sales Count Reseller/Product Wise, Sales Agent Reseller Wise, and Report Archive.



**Figure 10: Reports Section**

**Manage Orders -** You can manage sales (Approve Order) and generate invoice from this section

- **View Uploads** - You can view list of your uploaded files.
- **Pending Orders** - You can view list of your pending orders
- **Released Orders** - You can view list of your approved sales.
- **Pending Accessory Orders** - You can view list of your pending accessory order details.
- **Released Accessory Orders** - You can view list of your accessory order details.
- **Current Invoice** - You can view list of your current Invoices
- **Archive Invoice** – You can view your archived Invoices



**Figure 17: Mange Orders Section**