

# Automation CRM

User Manual

for

Reseller

Version 1.1

Dated 1<sup>st</sup> April 2011

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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/](http://www.onlinedemo.in/newcrm/)

User: jay

Password: xxxxxx (password will be provided separately)

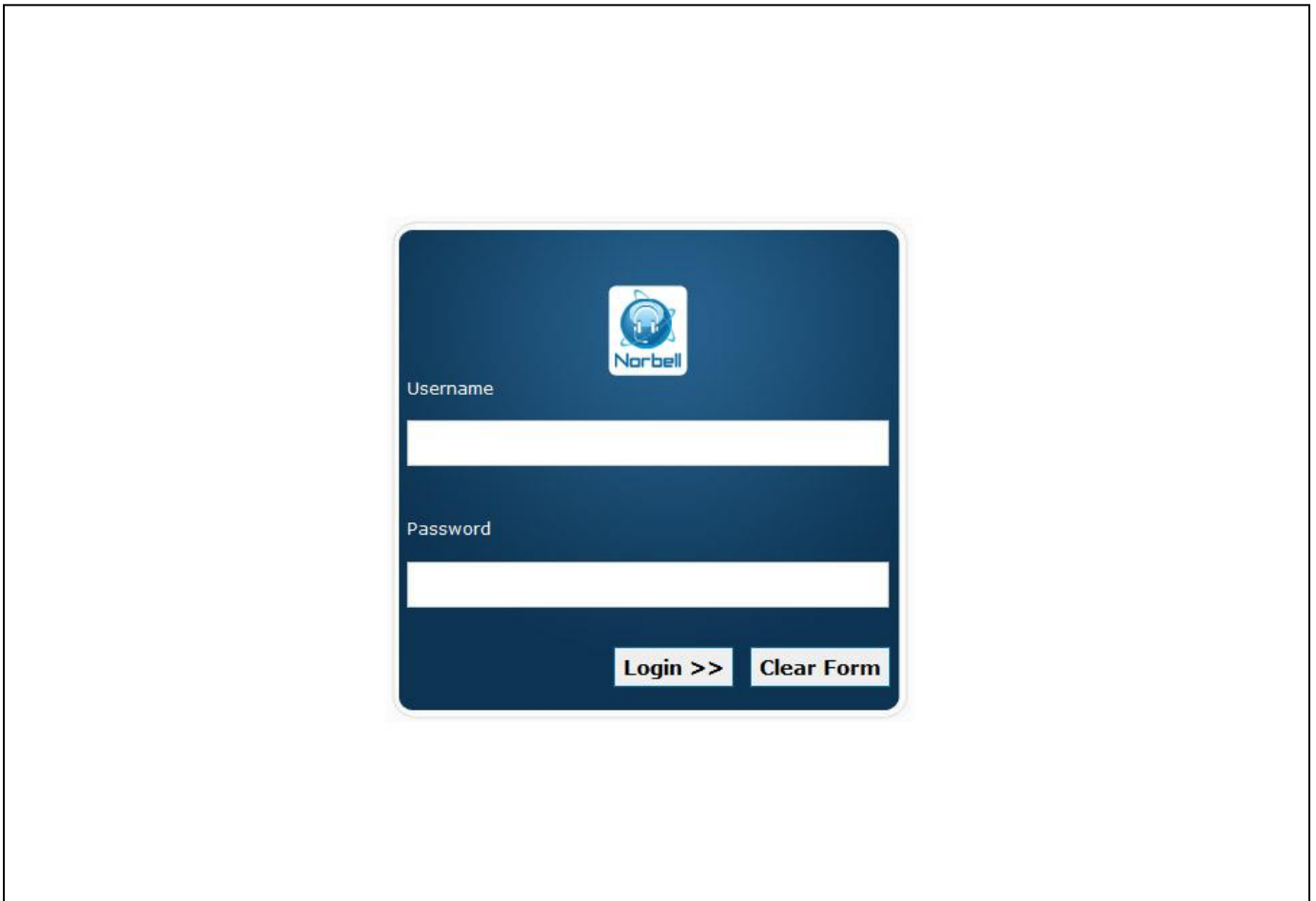


Figure 1 : Norbell CRM Log in Page

## CRM Dash Board

We have the access to all the modules from the dashboard

The screenshot shows the Norbell CRM Dashboard for a Test L1 Reseller. The interface includes a header with navigation links, a welcome message, and several data widgets.

**Header:** Test L1 Reseller | Change Password | Settings | Sign Out | Home | Resellers | Reports | Manage Orders | Support |

**Welcome:** Welcome Test L1 Reseller! | Home Section | Friday, July 02, 2010

**Stats:**

Sub-Resellers	0
Agents	1
Members	6
Packages	1
Retail Packages	1

**Latest Open Tickets:** Currently there are no open Support Tickets.

**Resellers:**

- Profile
- Sub-Resellers
- Users
- Agents
- Members
- Reseller Site

**Accounts:**

- Generate Invoices
- Payable Invoices
- Receivable Invoices

**Reports:**

- Member Report
- Agent Report
- Member: State Wise
- Member: Product Wise

**Support:**

- View Support Agents
- Add New Support Agent
- View Support Tickets

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. Retail Package is used to sale others.

## 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.

The screenshot shows a web application interface for managing resellers. At the top, there is a header with the title "Test L1 Reseller" and navigation links: "Change Password | Settings | Sign Out". Below this is a secondary navigation bar with "Home | Resellers | Reports | Manage Orders | Support |". A green banner displays "Welcome Test L1 Reseller!" and "Resellers Section" with the date "Friday, July 02, 2010".

The main content area is divided into a left sidebar and a main panel. The sidebar, titled "Resellers", lists "Test L1 Reseller" as the selected item. The main panel has a tabbed interface with "Profile" selected. The "Company Profile" section contains the following fields:

Type*	:	<input type="text" value="Level 1 Reseller"/>
Company*	:	<input type="text" value="Test L1 Reseller"/>
Contact Name	:	<input type="text" value="Test L1 Reseller"/>
Code	:	<input type="text" value="TLR"/>
Address1	:	<input type="text" value="Address"/>
Address2	:	<input type="text"/>
City	:	<input type="text" value="City"/>
State:Province	:	<input type="text" value="Ontario"/> <input type="button" value="v"/>
ZIP:Postal Code	:	<input type="text" value="L1V2X6"/>
Phone Number	:	<input type="text" value="416"/> - <input type="text" value="2258989"/>
Fax Number	:	<input type="text"/> - <input type="text"/>

Figure 2: Reseller Profile

## Sub Reseller

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

The screenshot displays the CRM interface for a user named 'Test L1 Reseller'. The page features a header with navigation links: 'Change Password | Settings | Sign Out' and 'Home | Resellers | Reports | Manage Orders | Support'. A green banner below the header contains the text 'Welcome Test L1 Reseller!', 'Resellers Section', and the date 'Friday, July 02, 2010'. The main content area is divided into a sidebar and a main panel. The sidebar, titled 'Resellers', includes a sub-menu with 'Test L1 Reseller'. The main panel has a tabbed interface with 'Profile', 'Sub-Resellers', 'Users', 'Agents', 'Members', and 'Retail Packages'. The 'Sub-Resellers' tab is active, showing the 'Add New Reseller' form. The form includes the following fields:

Type*	:	<input type="text" value="Level 2+ Reseller"/>
Company*	:	<input type="text"/>
Contact Name	:	<input type="text"/>
Code	:	<input type="text"/>
Address1	:	<input type="text"/>
Address2	:	<input type="text"/>
City	:	<input type="text"/>
State:Province	:	<input type="text" value="Select Province"/> ▼
ZIP/Postal Code	:	<input type="text"/>
Phone Number	:	<input type="text"/> - <input type="text"/>
Fax Number	:	<input type="text"/> - <input type="text"/>

Figure 4: Add Sub Reseller

## Users

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

# Test L1 Reseller

[Change Password](#) | [Settings](#) | [Sign Out](#)

[Home](#) | [Resellers](#) | [Reports](#) | [Manage Orders](#) | [Support](#)

Welcome Test L1 Reseller!
Resellers Section
Friday, July 02, 2010

**Resellers**

- Test L1 Reseller

Profile	Sub-Resellers	Users	Agents	Members	Retail Packages	
<b>Users</b>						
ID	Name	City	Phone	Email	User Type	Modify
278			-		Manager	
<b>Customer Service Agent</b>						
ID	Name	City	Phone	Email		Modify
12	Customer Support Agent	City	416-252-7750	custsup1@yahoo.com		
Add User						

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.

The screenshot displays the CRM interface for a reseller named 'Test L1 Reseller'. The page features a header with navigation links: 'Change Password | Settings | Sign Out' and 'Home | Resellers | Reports | Manage Orders | Support |'. A green banner below the header reads 'Welcome Test L1 Reseller!' and 'Resellers Section' with the date 'Friday, July 02, 2010'. The main content area is divided into a sidebar and a main table. The sidebar shows 'Resellers' with a sub-item 'Test L1 Reseller'. The main table has tabs for 'Profile', 'Sub-Resellers', 'Users', 'Agents', 'Members', and 'Retail Packages'. The 'Agents' tab is active, showing a table with columns: ID, Name, City, Phone, Email, Products, and Modify. One agent is listed with ID 279, Name 'Sale Agent', City 'City', Phone '416-3678181', and Email 'slagent@yahoo.com'. The 'Products' column contains a plus icon, and the 'Modify' column contains a pencil icon.

Resellers									
▪ Test L1 Reseller									
Profile		Sub-Resellers		Users	Agents	Members		Retail Packages	
ID	Name	City	Phone	Email		Products	Modify		
279	Sale Agent	City	416-3678181	slagent@yahoo.com					

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

# Test L1 Reseller

[Change Password](#) | [Settings](#) | [Sign Out](#)

[Home](#) | [Resellers](#) | [Reports](#) | [Manage Orders](#) | [Support](#)

Welcome Test L1 Reseller!
Resellers Section
Friday, July 02, 2010

**Resellers**

- Test L1 Reseller

Profile		Sub-Resellers	Users	Agents	Members	Retail Packages		
ID	Activation Date	Membership No.	Product	Name	City	Phone	Email	Status
12455	2010-06-25	202086156	TLR-0001	DEF MNO	Toronto	416-2059875		
12510	0000-00-00		TLR-0001	John Doe	New York	991-987654		
12511	0000-00-00		TLR-0001	John Doe	New York	991-987654		
12512	0000-00-00		TLR-0001	John Doe	New York	991-987654		
12513	0000-00-00		TLR-0001	John Doe	New York	991-987654		
12514	2010-07-01	699737846	TLR-0001	John Doe	New York	991-987654		

Search Member

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.

Test L1 Reseller

Change Password | Settings | Sign Out

Home | Resellers | Reports | Manage Orders | Support |

Welcome Test L1 Reseller! Resellers Section Friday, July 02, 2010

Resellers

- Test L1 Reseller

Profile Sub-Resellers Users Agents Members Retail Packages

Add New Retail Package

Select Package<sup>1</sup> :

Figure 8: Select Package (Step - 1)

Test L1 Reseller

Change Password | Settings | Sign Out

Home | Resellers | Reports | Manage Orders | Support |

Welcome Test L1 Reseller! Resellers Section Friday, July 02, 2010

Resellers

- Test L1 Reseller

Profile Sub-Resellers Users Agents Members Retail Packages

PACKAGE SUMMARY

Package :

Product :

WHOLESALE PRICES

Effective Date	Registration (Monthly)	Renewal (Monthly)	Registration (Dual)	Monthly Renewal (Dual)	Yearly Renewal (Dual)	Shipping	Kit Cost
2010-06-25	\$5.75	\$5.55				\$3.25	\$2.65

SUGGESTED RETAIL PRICES

Registration (Monthly)	Renewal (Monthly)
\$9.95	\$9.95

RETAIL PACKAGE INFORMATION

Name :

Description :

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.

The screenshot displays the 'Reports Section' of the CRM interface for a 'Test L1 Reseller'. At the top, there is a navigation bar with links for 'Change Password | Settings | Sign Out' and 'Home | Resellers | Reports | Manage Orders | Support |'. Below this, a green banner contains the text 'Welcome Test L1 Reseller!', 'Reports Section', and the date 'Friday, July 02, 2010'. On the left side, a vertical menu lists various report categories: Member Info Summary, Member Information Details, Reseller Info Summary, Reseller Info Details, Sales (Act/Can), Wholesale Sales Summary, Wholesale Sales Details, Sales Forecast Summary, Sales Forecast Details, Sales Count -Reseller wise, Sales Count -Product wise, Sales Agents -Reseller wise, and Report Archive. The main content area is titled 'Member Information Summary Report' and includes a 'Report Archive' link. The form contains the following fields: 'Start Date' (06/25/2010), 'End Date' (07/02/2010), 'Select Reseller' (All), and 'Member Status' (All). A 'Generate Report' button is positioned below the 'Select Reseller' field.

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

Test L1 Reseller

[Change Password](#) | [Settings](#) | [Sign Out](#)

[Home](#) | [Resellers](#) | [Reports](#) | [Manage Orders](#) | [Support](#)

Welcome Test L1 Reseller!
Orders Section
Friday, July 02, 2010

- [View Uploads](#)
- [Pending Orders](#)
- [Released Orders](#)
- [Pending Accessory Orders](#)
- [Released Accessory Orders](#)
- [Current Invoices](#)
- [Invoice Archive](#)

From  To 
[Search](#)
[Show All](#)

ID	Date	Type	User	Total Records	Exceptions	File
1	2010-07-01 06:25:32	Order	Howard Cracower	3	2	TLRORD2010070102.xml
2	2010-07-01 06:33:23	Cancellation	Howard Cracower	1	0	TLRCAN2010070101.xml
3	2010-07-01 06:36:15	Cancellation	Howard Cracower	1	0	TLRCAN2010070101.xml
4	2010-07-01 06:36:40	Cancellation	Howard Cracower	1	0	TLRCAN2010070101.xml
6	2010-07-01 07:07:38	Order	Howard Cracower	2	4	TLRORD2010070101.csv
7	2010-07-01 07:07:35	Order	Howard Cracower	4	5	TLRORD2010070101.csv
8	2010-07-01 07:07:40	Order	Howard Cracower	2	1	TLRORD2010070101.csv
9	2010-07-01 07:07:18	Order	Howard Cracower	3	2	TLRORD2010070101.csv
10	2010-07-01 07:07:04	Order	Howard Cracower	4	3	TLRORD2010070101.csv
11	2010-07-01 07:07:15	Order	Howard Cracower	5	4	TLRORD2010070101.csv
12	2010-07-01 ---	Order	Howard	2	1	TLRORD2010070101.csv

**Figure 17: Mange Orders Section**