

Automation CRM

User Manual

for

Sale Agent

Version 1.1

Dated 1st April 2011

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CRM Sale Agent login Page

URL: www.onlinedemo.in/newcrm

User: agent123

Password: xxxxxx (password will be provided separately)

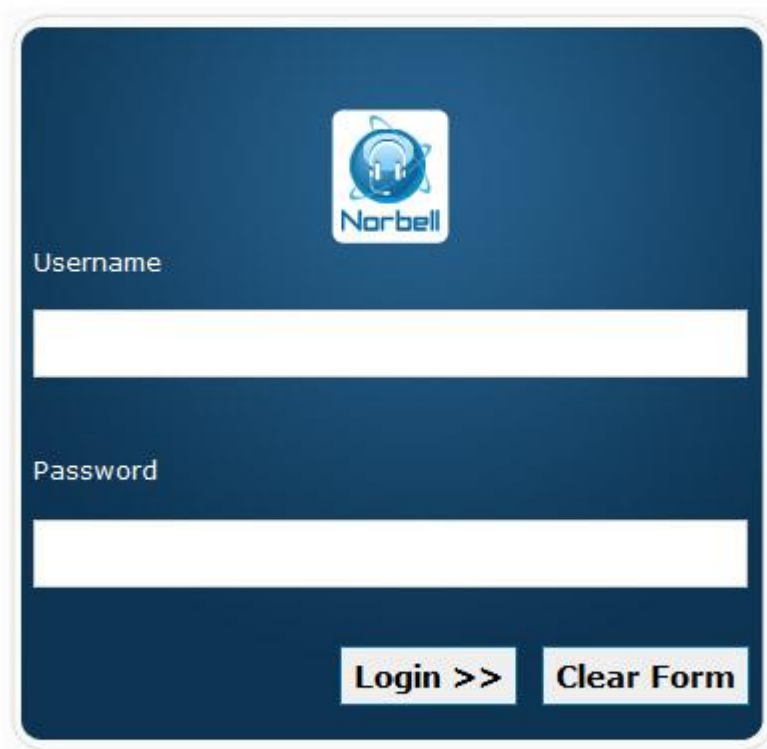
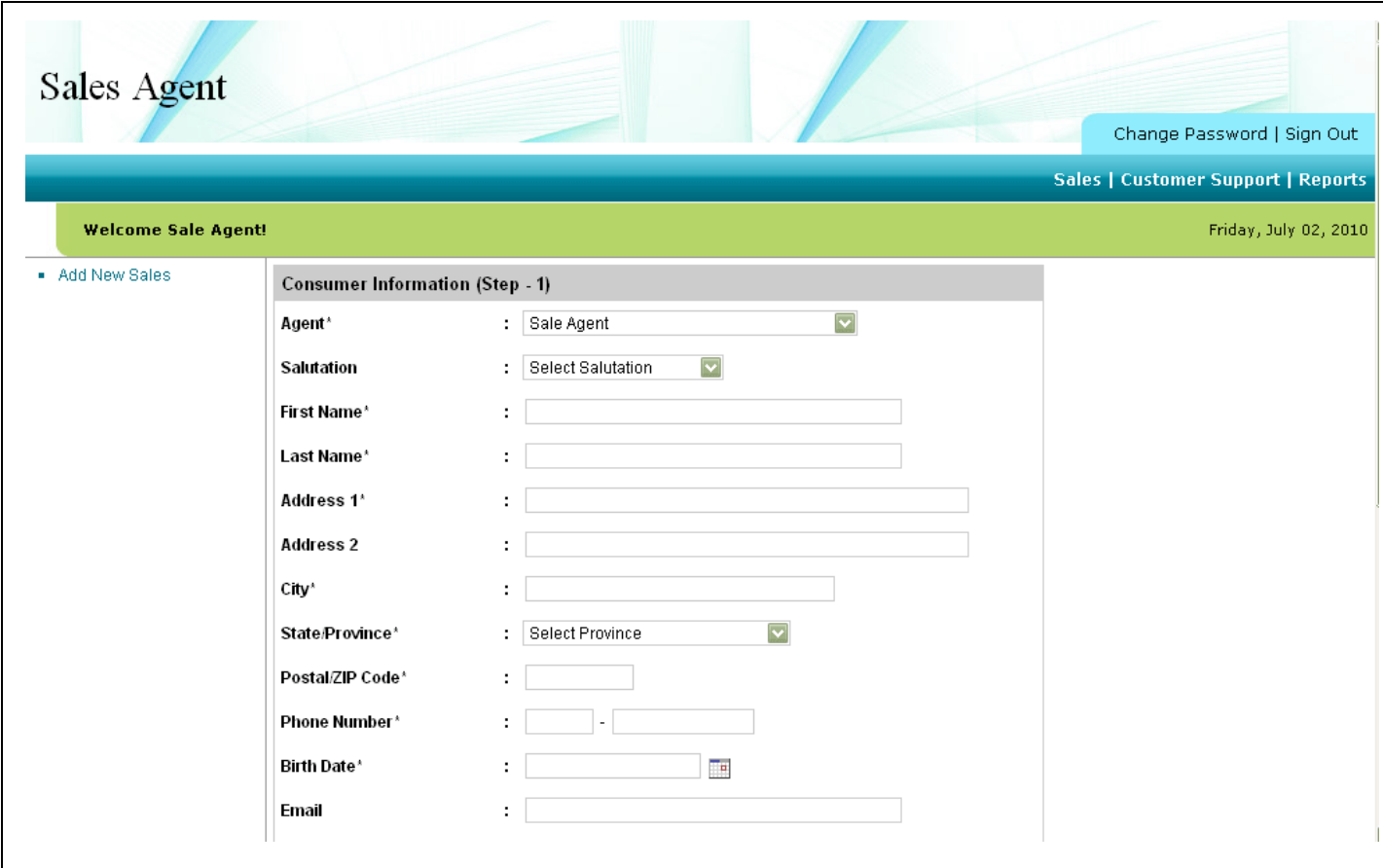


Figure 1: Norbell CRM Sale Log in Page

Sales – In this section sale agent can add new members and sale only those retail packages which are assigned to them.



The screenshot displays the 'Sales Agent' dashboard. At the top left, the title 'Sales Agent' is visible. On the top right, there are links for 'Change Password | Sign Out' and a navigation menu with 'Sales | Customer Support | Reports'. A green banner below the navigation contains the text 'Welcome Sale Agent!' and the date 'Friday, July 02, 2010'. The main content area is titled 'Add New Sales' and features a form for 'Consumer Information (Step - 1)'. The form includes the following fields:

- Agent*: Sale Agent (dropdown menu)
- Salutation*: Select Salutation (dropdown menu)
- First Name*: [text input]
- Last Name*: [text input]
- Address 1*: [text input]
- Address 2*: [text input]
- City*: [text input]
- State/Province*: Select Province (dropdown menu)
- Postal/ZIP Code*: [text input]
- Phone Number*: [text input] - [text input]
- Birth Date*: [text input] with a calendar icon
- Email*: [text input]

Figure 2: Add Sales

Customer Support – In this section you can search member and view his sale details

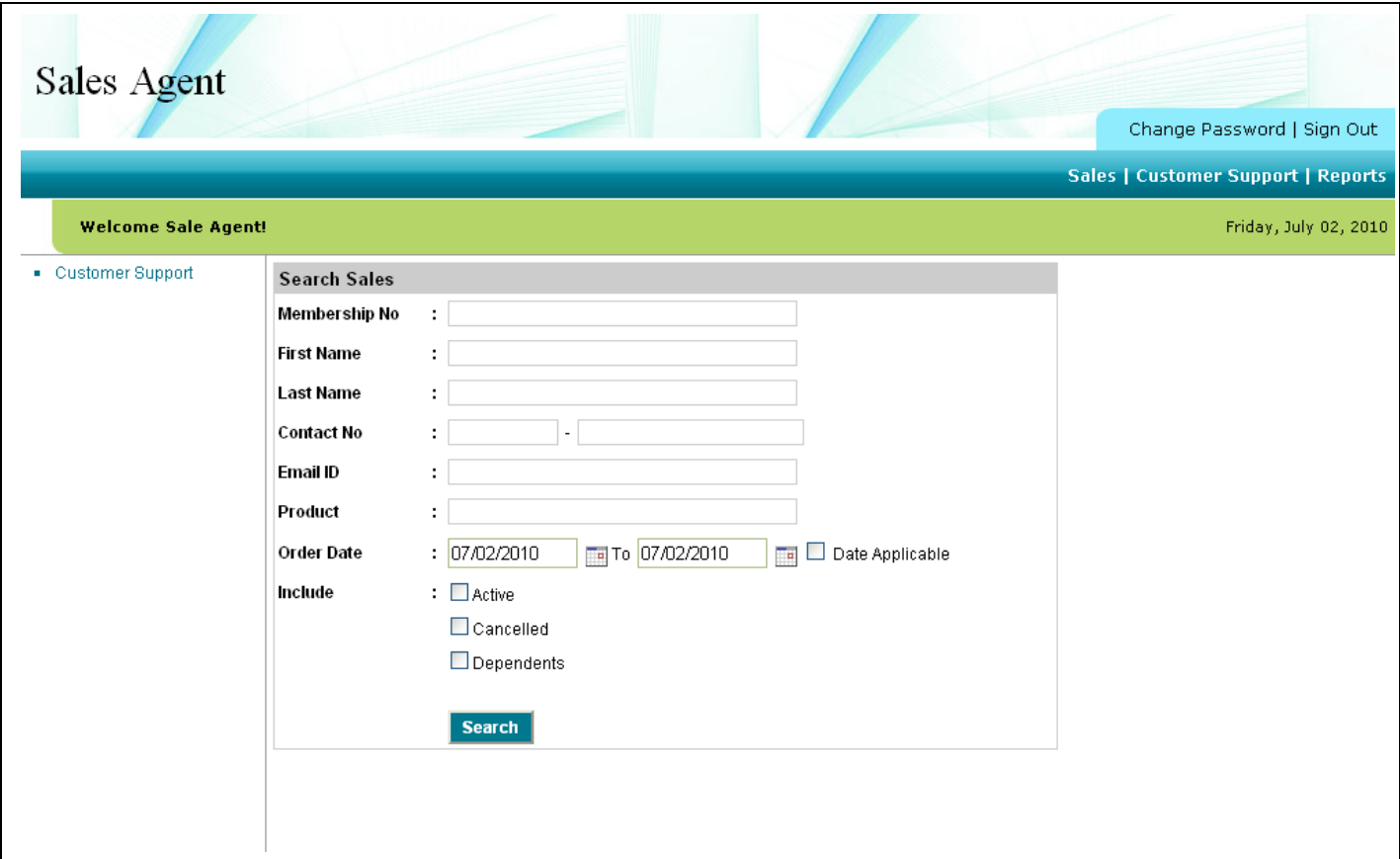


Figure 3: Customer Search

Reports – In this section you can view Summary/Details/Sales Commissions Reports

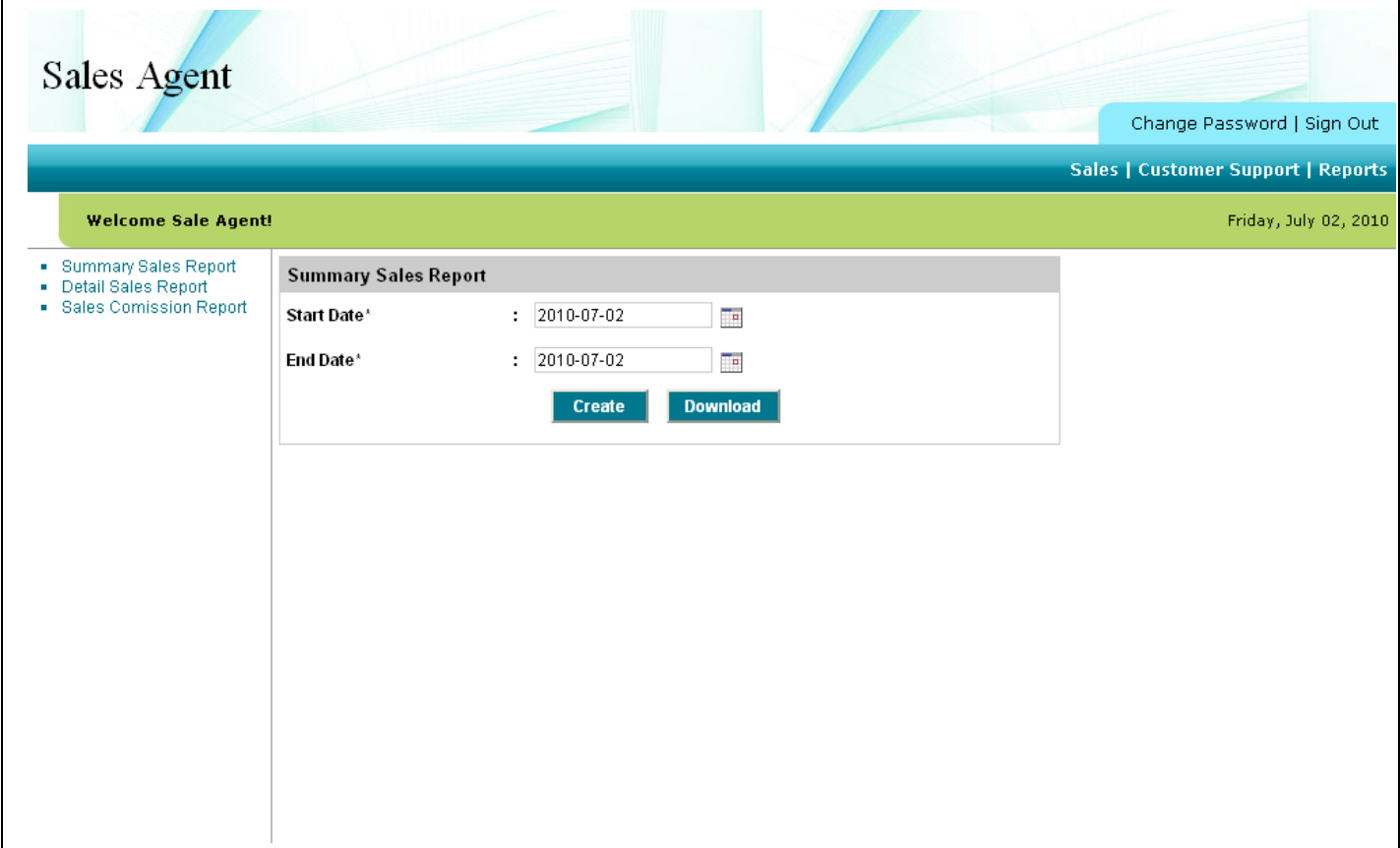


Figure 4: Reports Section