Norbell CRM

User Manual

for

Membership Services & Provider Relationship

Version 1.1

Dated 11th January, 2011

Index

Membership Services

Provider Relationship
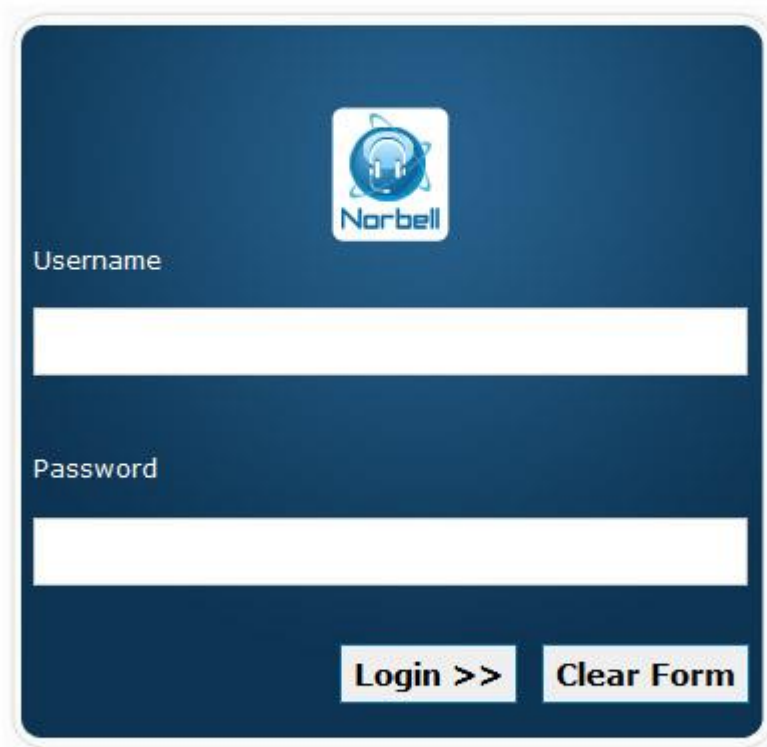
CRM Membership Services login Page

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

Figure 1: Norbell CRM Membership Services Log in Page

Admin Interface – In this section you can Add/Edit & view User details
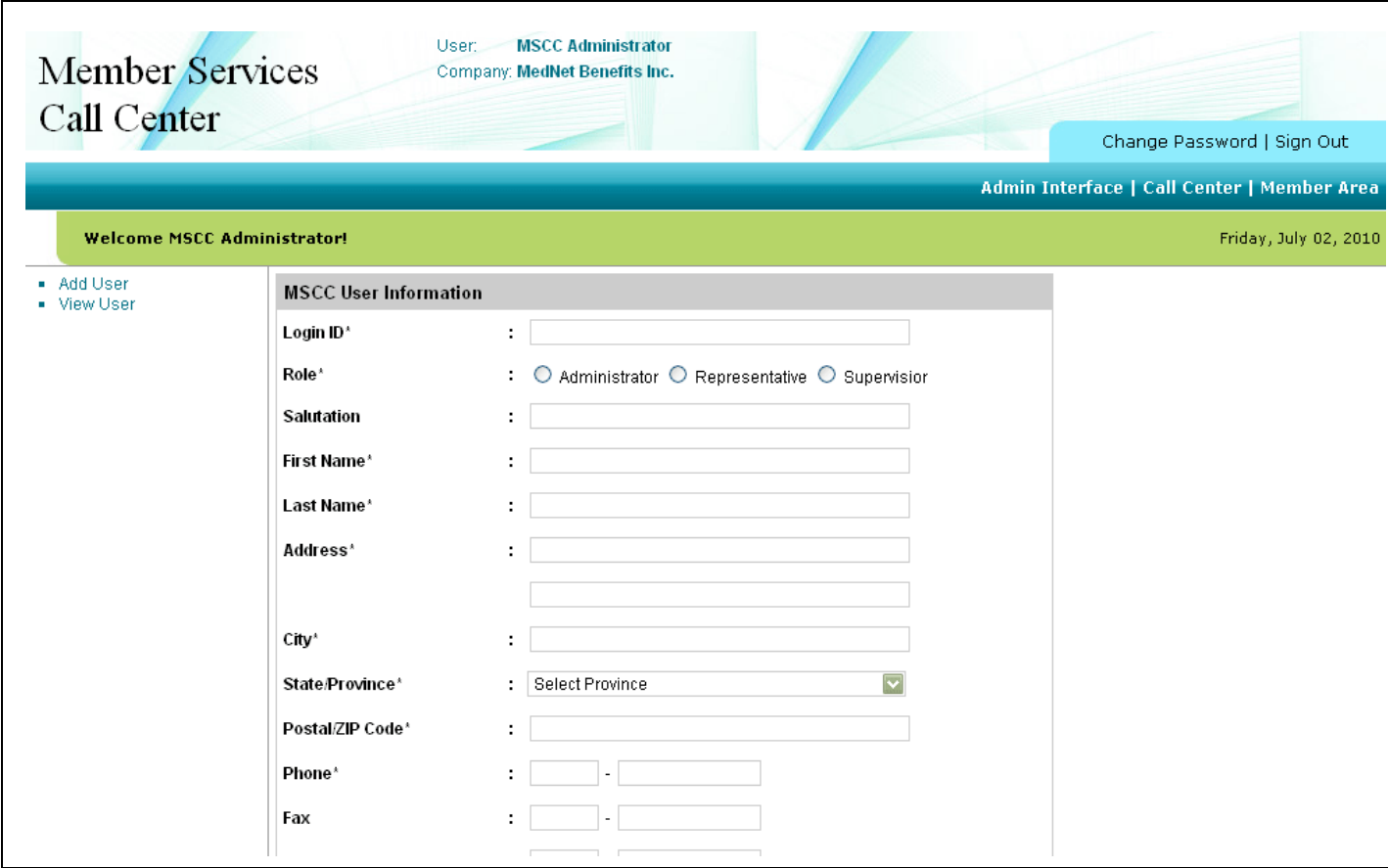
- **Add User**
- **View User**

Figure 2: User Add

Call Center -

- **Stats**
- **Home**

Figure 3: Ticket Summary

Member Area – In this section you can Search Member after that select a member to view his Program Details, Member Info, Membership History, Referral History, Tickets, Notes and can also Add/Update notes.

Figure 4: Member Area

CRM Provider Relationship login Page

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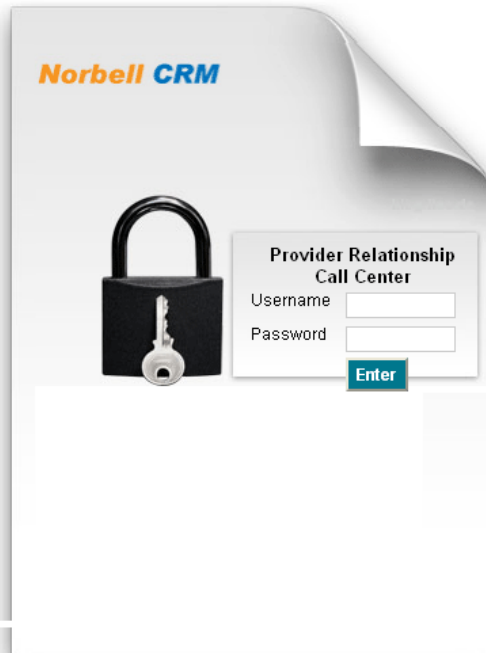**Password: xxxxxx** (password will be provided separately)

Figure 1: Provider Relationship Login Page

Admin Interface – In this section you can Add/Edit & view User details

- **Add User**
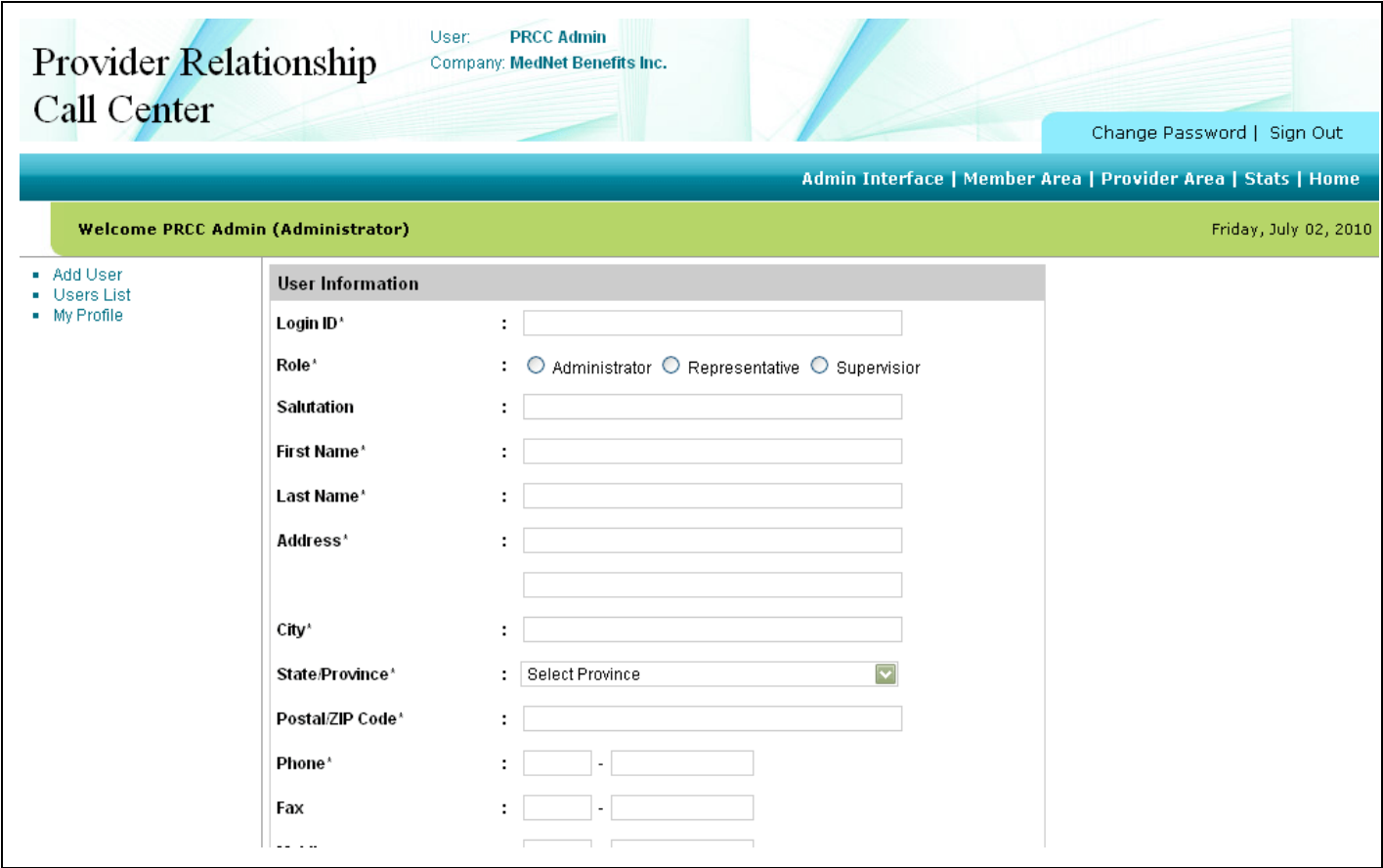- **View User**
- **My Profile**

Figure 2: Add User

Member Area – In this section you can Search Member after that select a member to view his Program Details, Member Info, Membership History, Referral History, Tickets, Notes, and can also Add/Update notes.
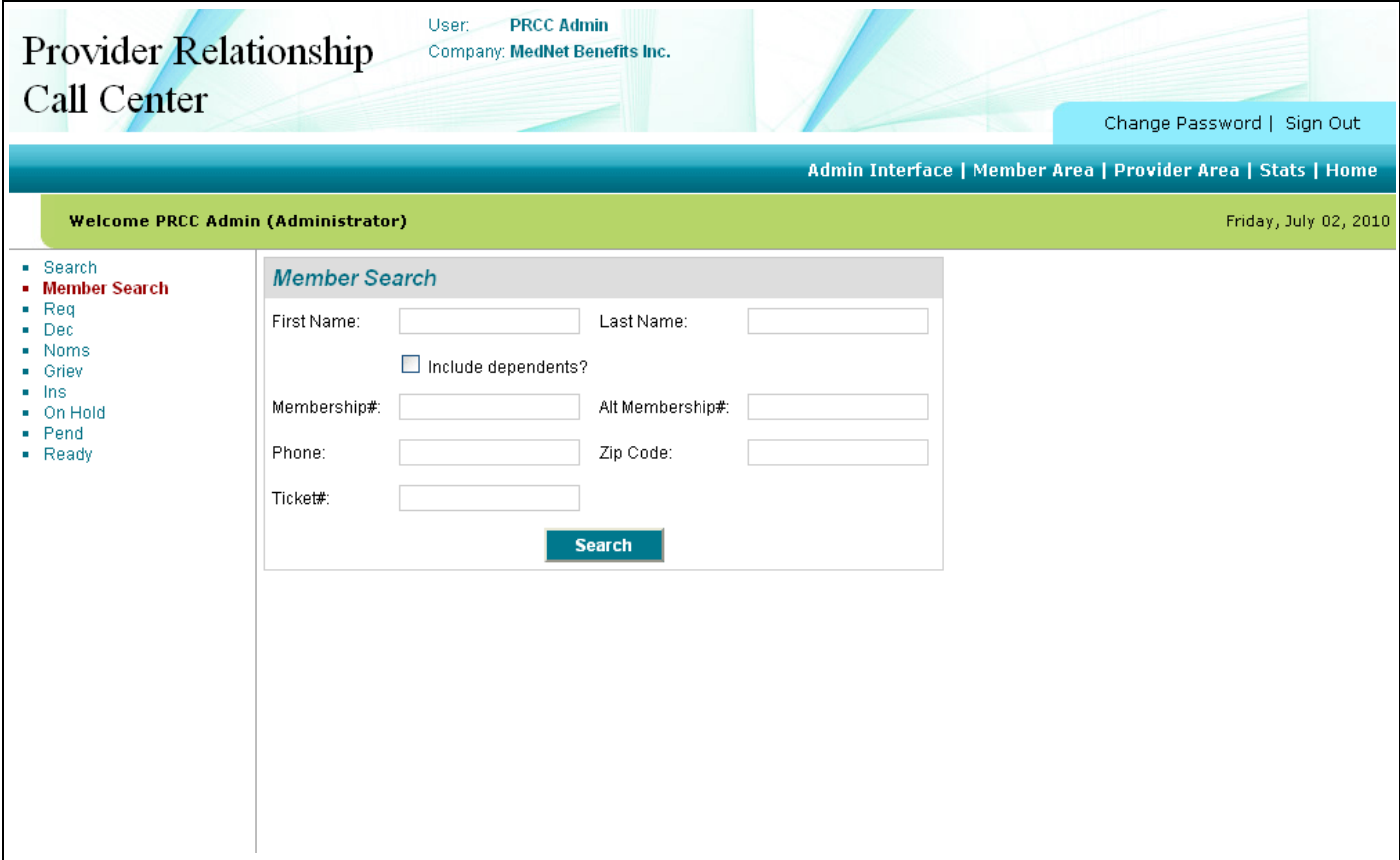

Figure 3: Member Search

Provider Area – In this section you can Add/Edit/View User, Add/Edit/View Provider, View Dental/Vision Pricing List and Search Dental/Vision Pricing List.

Figure 4: Provider Area

Stats – In this section you can View Ticket Summary

Figure 5: Stats

Provider Search – We can search a Provider from here. We also have the ability to find the exact location of the Provider by looking at the Google Map.

Figure 6: Provider Search