Soham CRM User Guide

1 Introduction

1.1. About This Guide

This user guide provides step-by-step instructions on how to navigate and use the Soham CRM for Real Estate efficiently. It is intended for sales teams, finance teams, field agents, management and administrative users.

1.2. About the CRM System

The CRM system is designed to streamline, leads management, site schedule, customer management, track communication, billing and revenue management, inventory management, performance tracking and generate analytics for informed decision-making.

1.3. Key Features of the Soham CRM

- Lead Management
- Customer Management
- Site Visit Schedule
- Sales Lifecycle
- Properties
- Sales Performance
- Tasks & Reminders
- Customer Support
- Reports & Dashboards
- User Access & Permission Control
- Integration with Email and Third-Party Apps

2. Getting Started

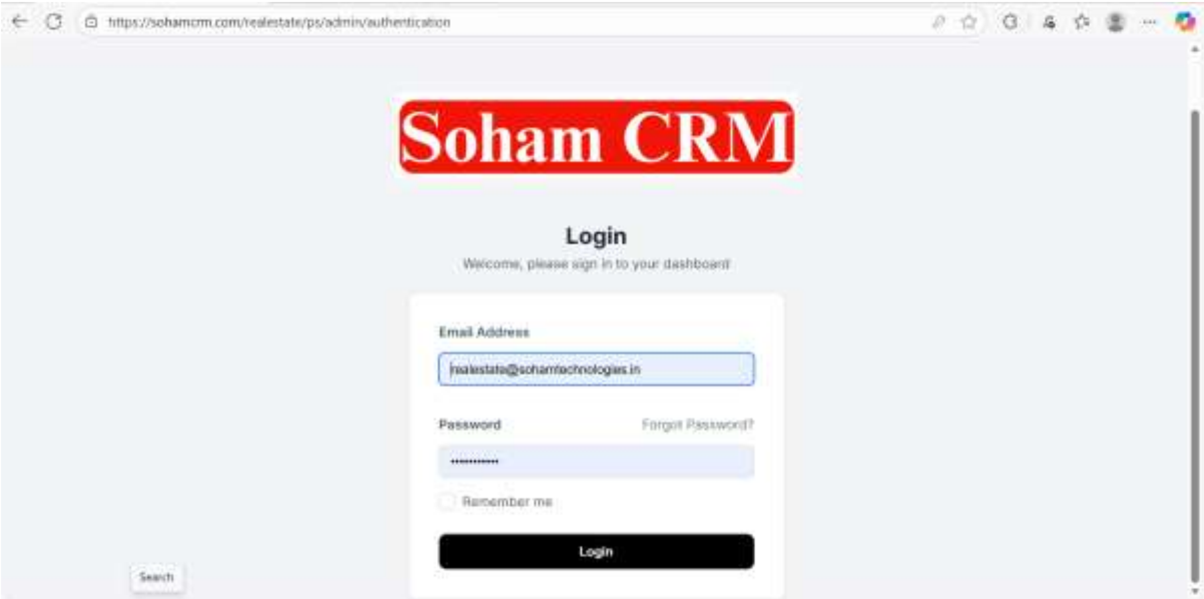
2.1. Logging In

i. Open sohamcrm.com URL.

ii. Enter your username and password.

iii. Click Forgot Password to reset the password.

iv. Click on Log In to log into the system.



2.2. Main Menu:

The main menu is situated on the left side of the CRM System and includes following modules:

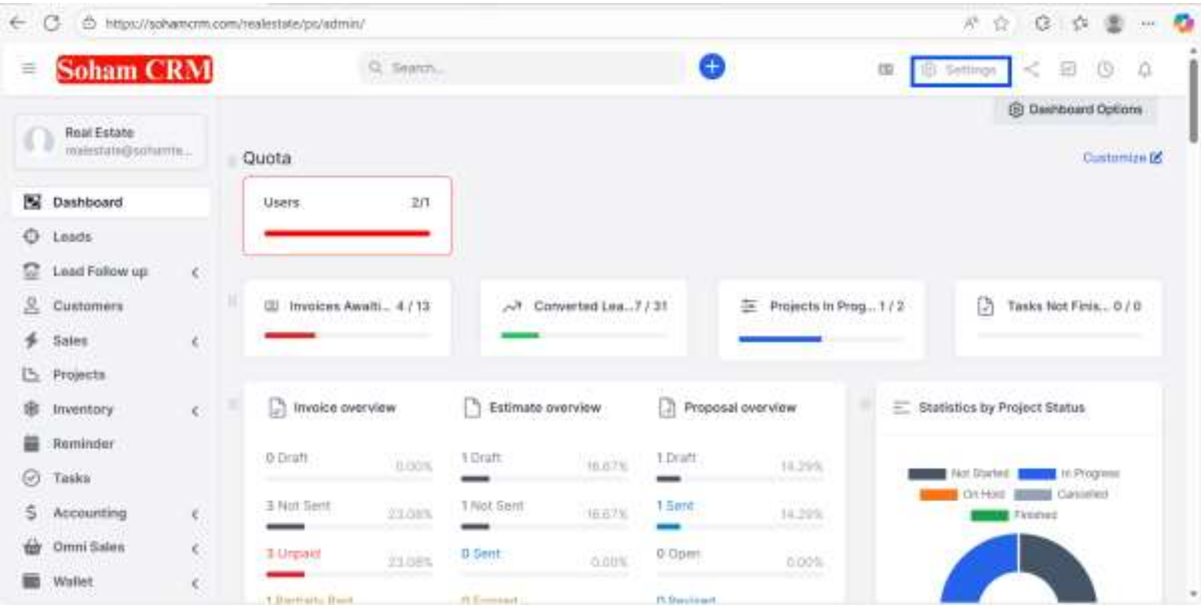
- Dashboard
- Leads
- Customers
- Sales
    - Proposal
    - Estimates
    - Invoices
    - Payments
    - Credit Note

    - Items
- Project
- Reminder
- Task
- Expenses
- Contracts
- WhatsApp
- Reports
- Custom Email/SMS
- Get Support
- Setup

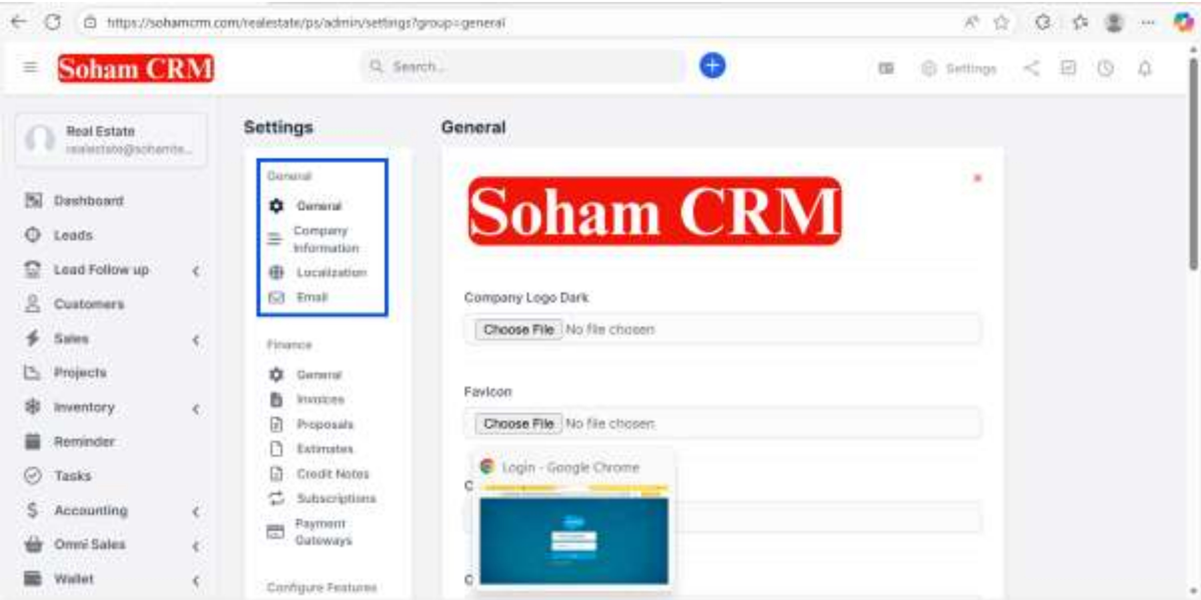
2.3. Setting up Company Profile:

Setting up company profile is filling in necessary information regarding the company. To setup company profile

i. Select the **Settings** button to open setting layout page.



ii. Select the tabs on the settings tab one by one and fill the information to complete the setup.



2.3.1 Email Setup:

-To configure your email account for sending emails from the CRM system, generate an in app password from Gmail Account.

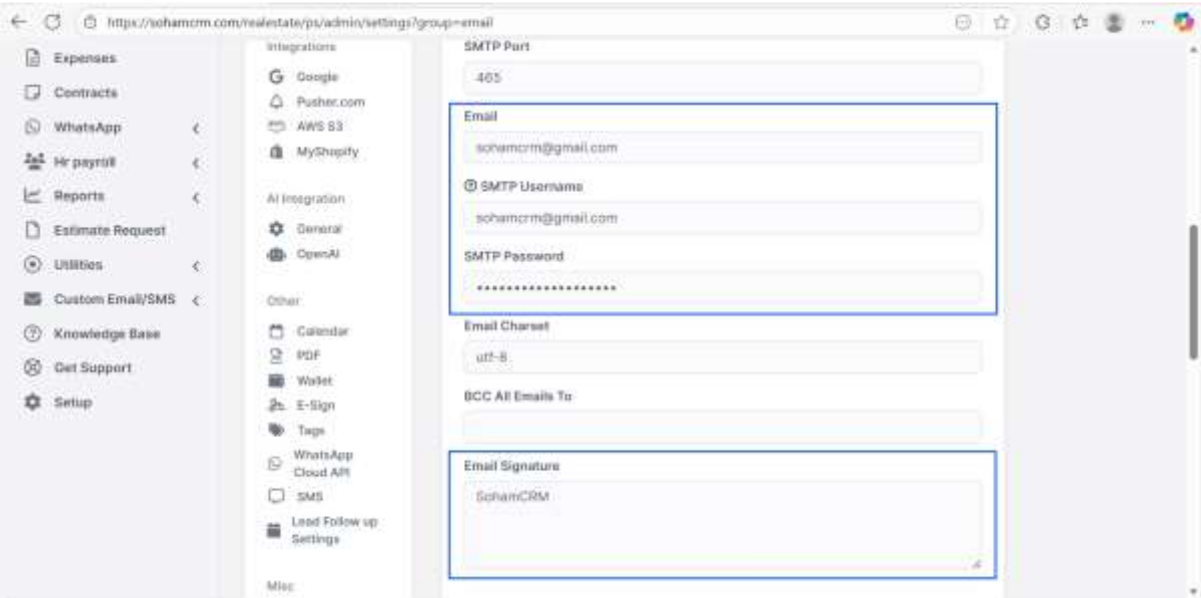
i. Select **Email** from the General Settings.

ii. Once the SMTP Settings page is open, let all fields be untouched.

iii. Enter your email id in **Username** and the in app generated password in the **Password** field.

iv. Enter your desired signature name in the **Email Signature** field.

v. Leave everything as it is and click the Save Settings button to save the settings.

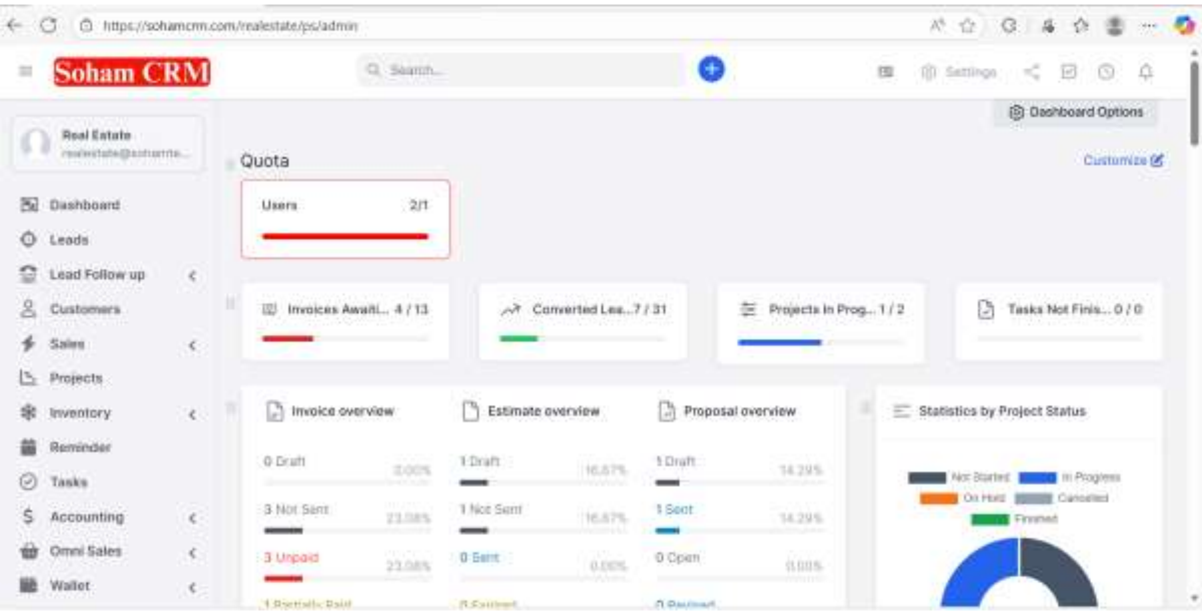


2.4. Dashboard:

Upon logging into the system, the first page is the Dashboard page.

Dashboard gives you overview related to:

- Leads
- Projects
- Agreements
- Invoices
- To do tasks
- Calendar
- Payments

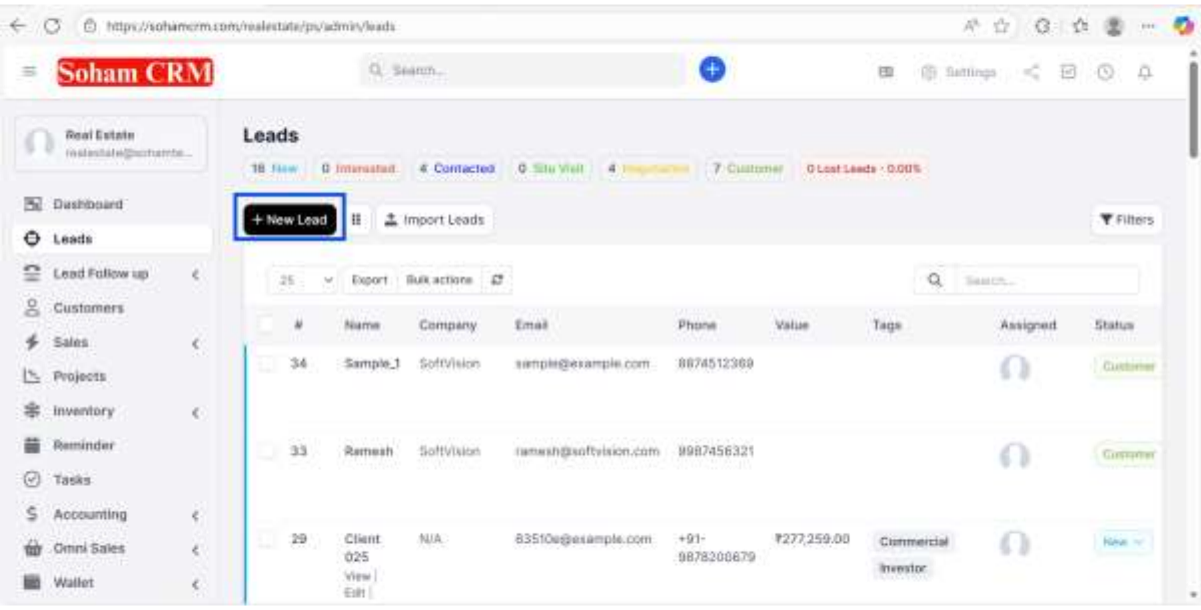


3. Leads

3.1. Creating New Lead:

To create a new lead, select **Leads** from the main menu of the Soham CRM.

i. Click on **New Lead** button on the Leads page.

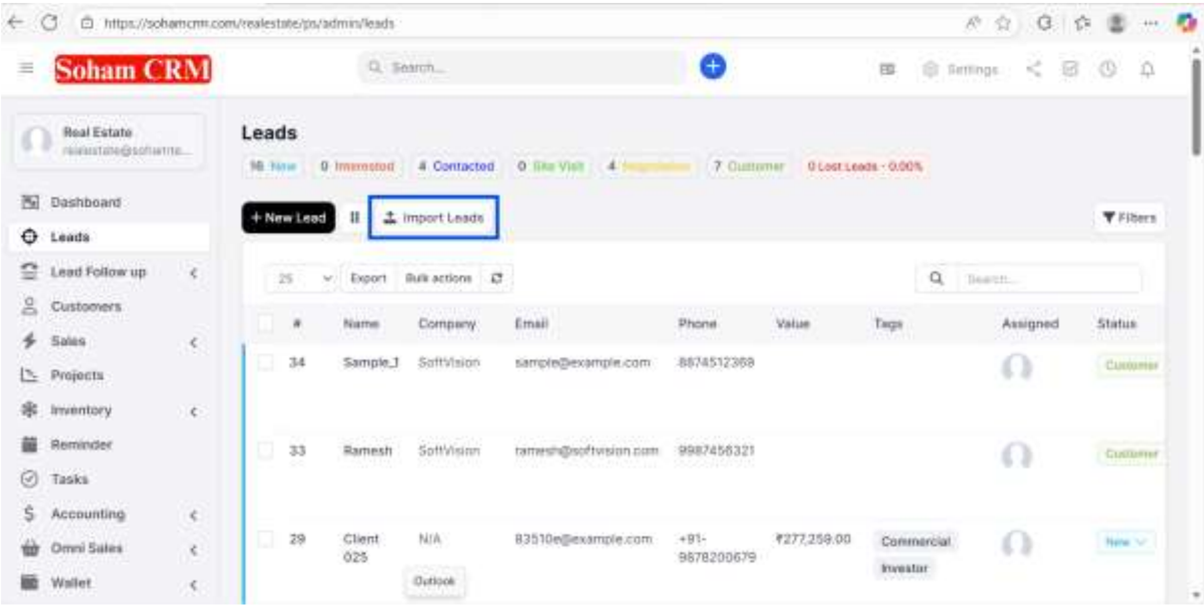


ii. Fill the information in the lead form and click **Save** button at the bottom and this will create a new lead.

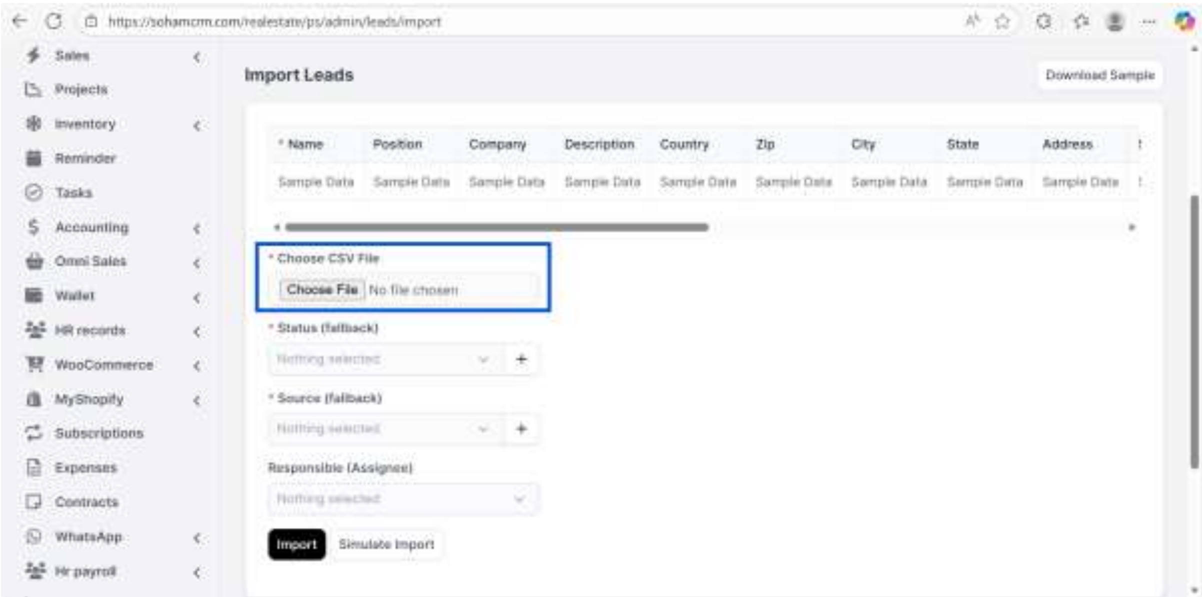
3.2. Importing Leads:

To import leads into the CRM system.

i. Click on the **Import Leads** button on the Leads page to open the import leads page.



ii. Click on the **Choose File** button to select and import the file in the CRM system. Make sure that the file is stored in the **.CSV** format.



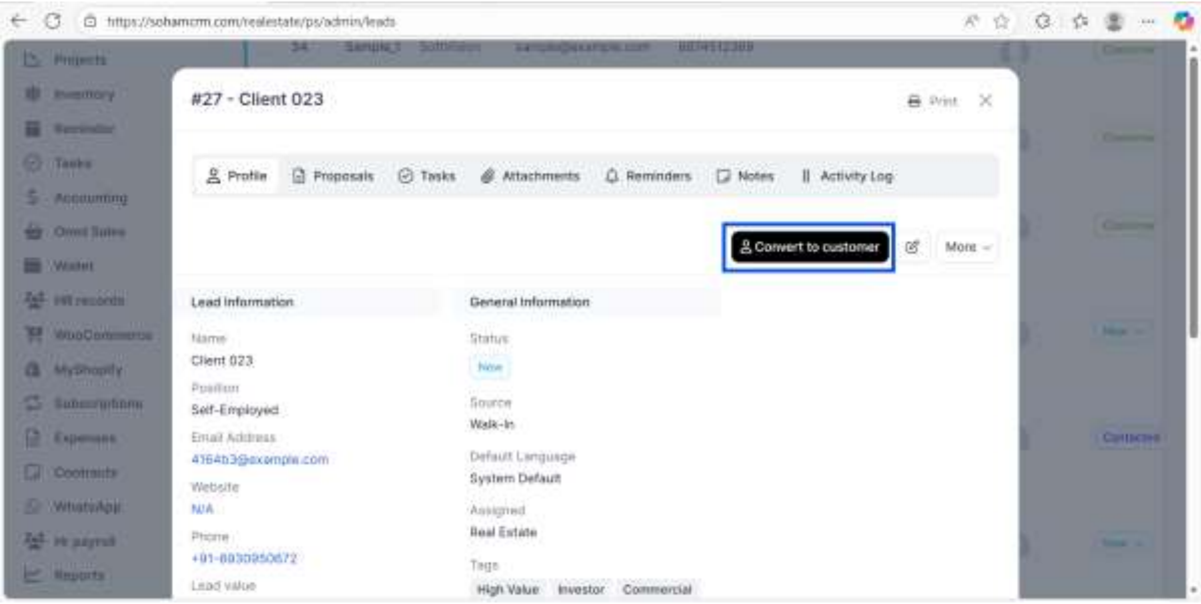
4. Customers:

Customers can be created by either converting leads into customers or by creating new customers/importing customers.

4.1. Converting Lead to Customer:

i. Select a **lead profile** from the **leads page** and open it.

ii. Click on **Convert to Customer** button to start the conversion.



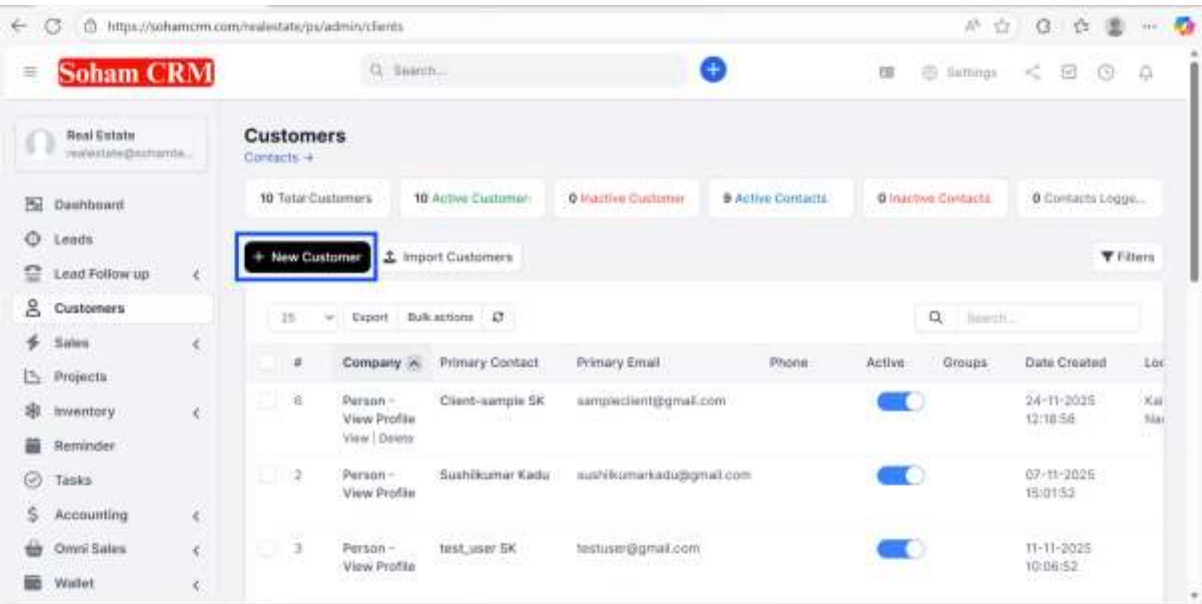
iii. Fill the form that open after clicking and click **Save** button at the end.

4.2. Creating a new Customer:

You can create a customer directly, by passing lead creation and conversion process. To do so,

i. Select the **Customers** tab form the main menu of the CRM to open the customers page.

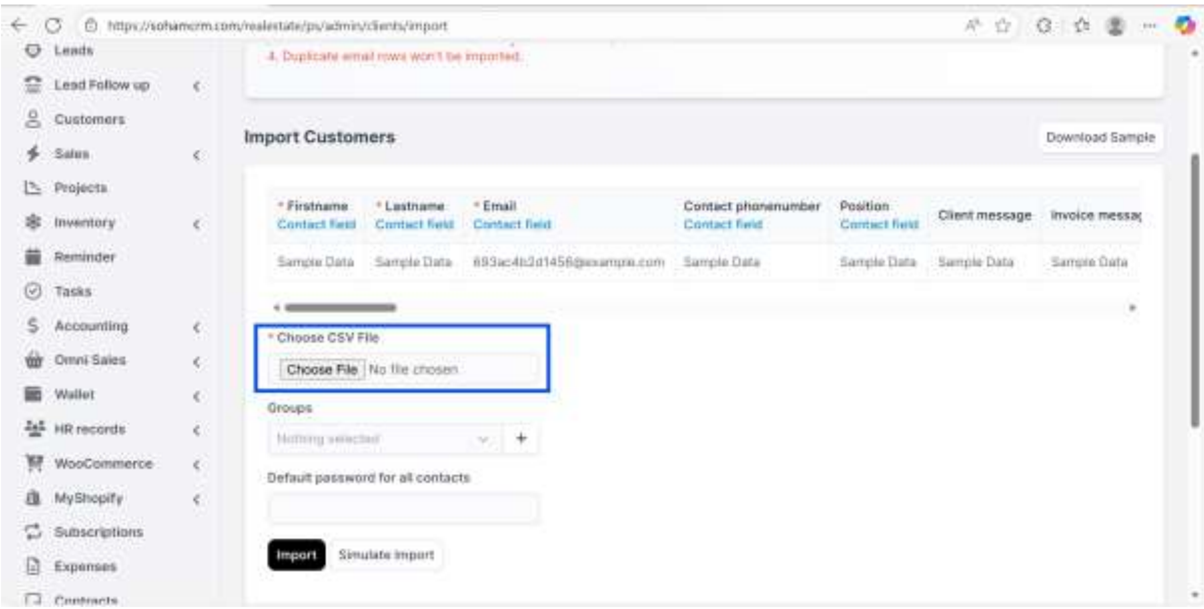
ii. Click on the **New Customer** button, fill the form and save the information.



4.3. Import Customers:

i. On customers page click on the **Import Customers**.

ii. Click on the **Choose File** button to select and import the file in the CRM system. Make sure that the file is stored in the **.CSV** format.



5. Sales:

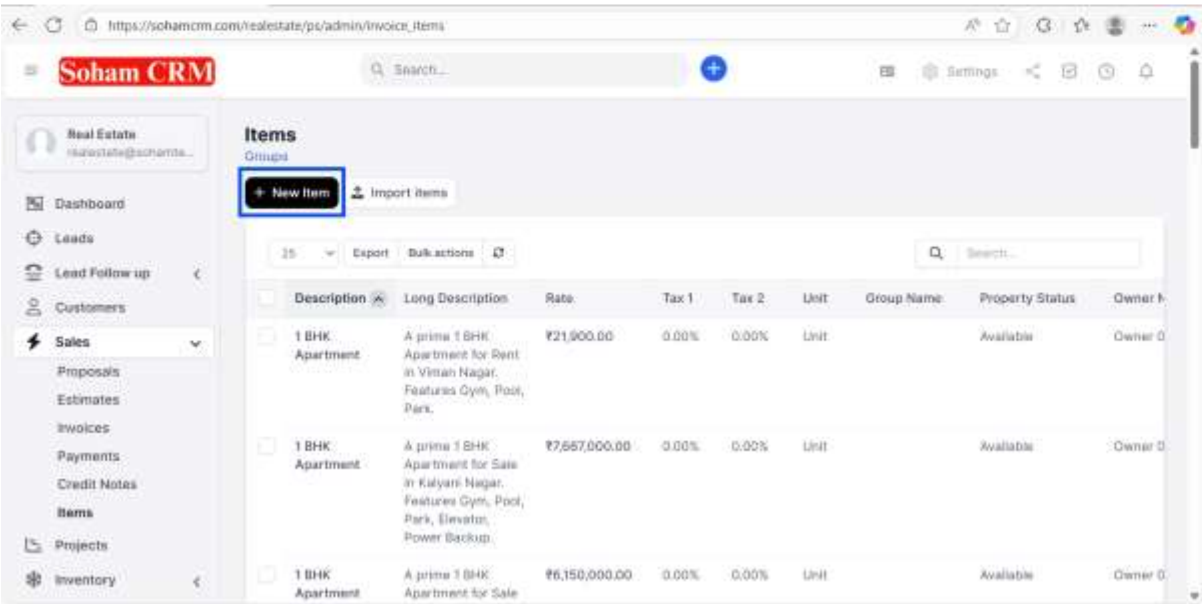
Soham CRM facilitates managing the sales lifecycle. The sales tab comprises of the following modules:

- Items
- Proposals
- Estimates
- Invoices
- Payments

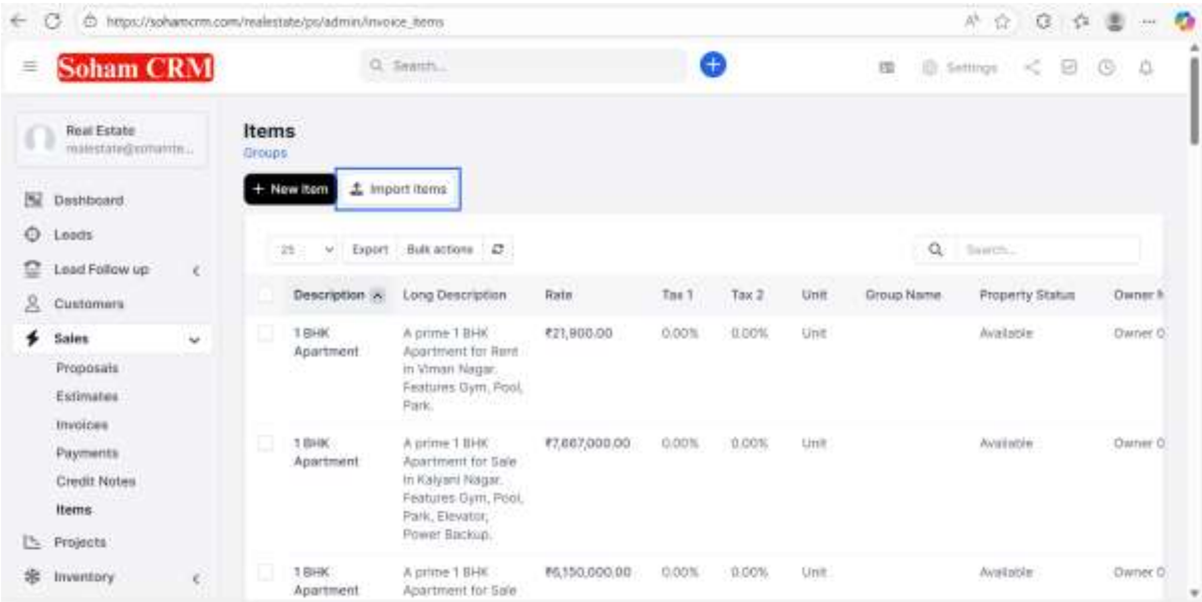
5.1. Items:

Items depict the inventory of products and services offered by the company. Which are used to track inventory and can be used in the billing process.

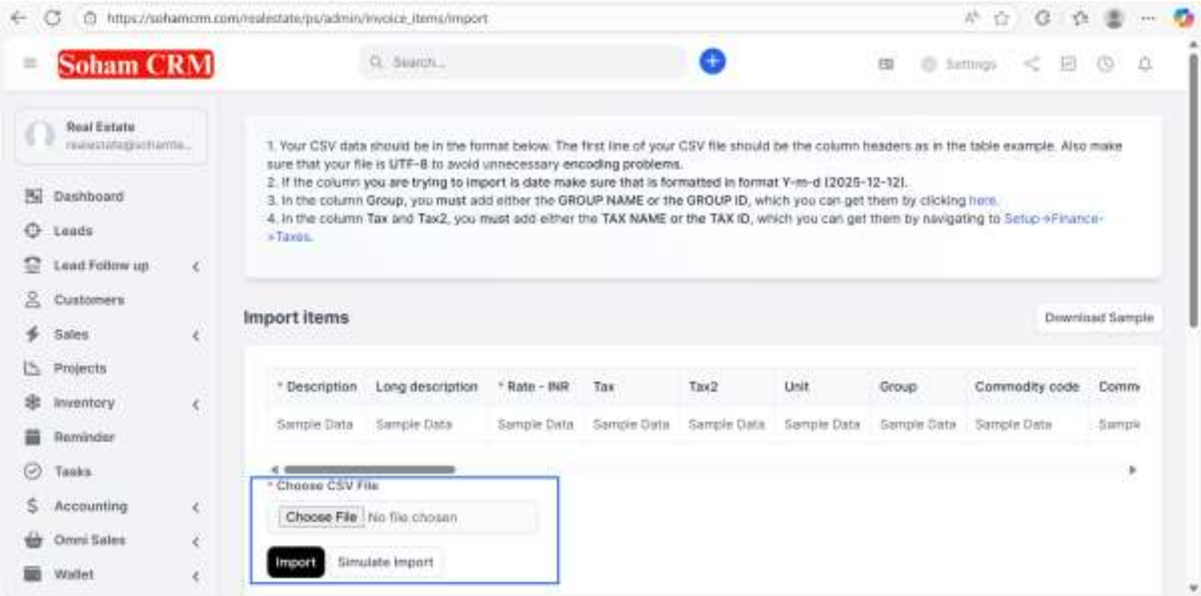
i. To add an item, select **Items** under **Sales** tab. Click on the **New Item** button on the Items page. Fill the details and click **Save** button.



ii. To import items in to the CRM system, click on the **Import Items** button on the Items page.



iii. Click **Choose File** and select the file that you want to import. Make sure the file columns are in the same format as shown in the sample and the file extension is **.CSV**.

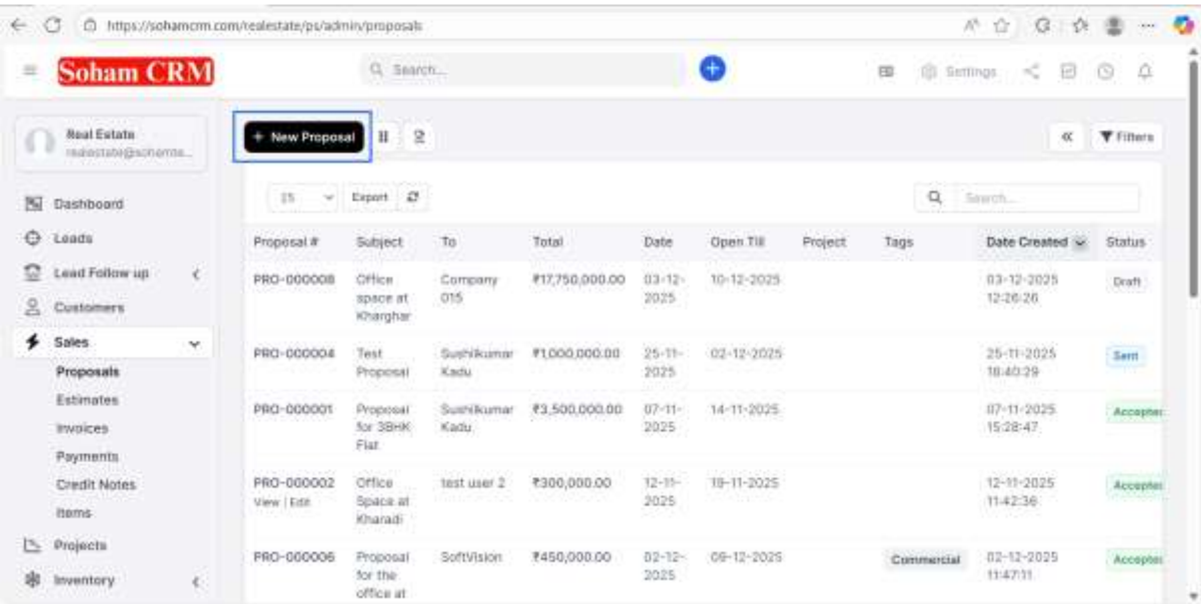


5.2. Proposals:

-You can create a proposal for a Lead as well as for a customer.

-The proposals creation can be accessed through the sales tab in the main menu or from the menu within Lead and Customer profiles directly.

i. To create a proposal, select **Proposal** from the **sales** tab. Click on the **New Proposal** button and fill the information related to the Lead or a Customer.

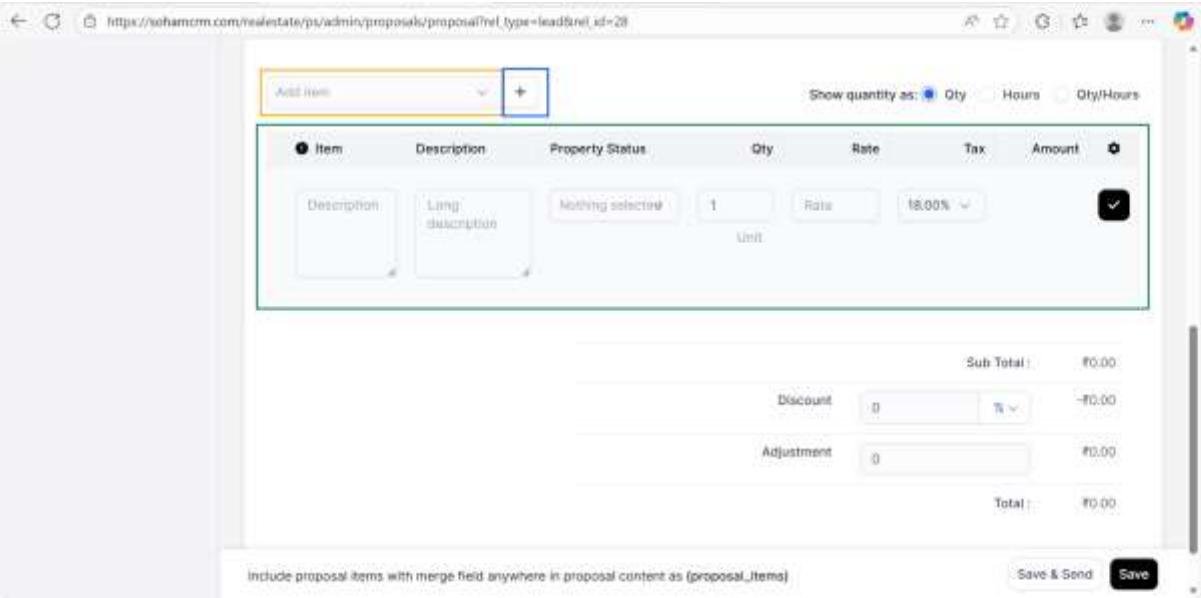


The lower part of the Proposal consists of the fields related to the item and the pricing.

i. Click on the **Add item** search box to search and select the item to add.

ii. Click on the **+** button to add a new item.

iii. You can also directly type the item information in the fields given below related to the **description** of the item.



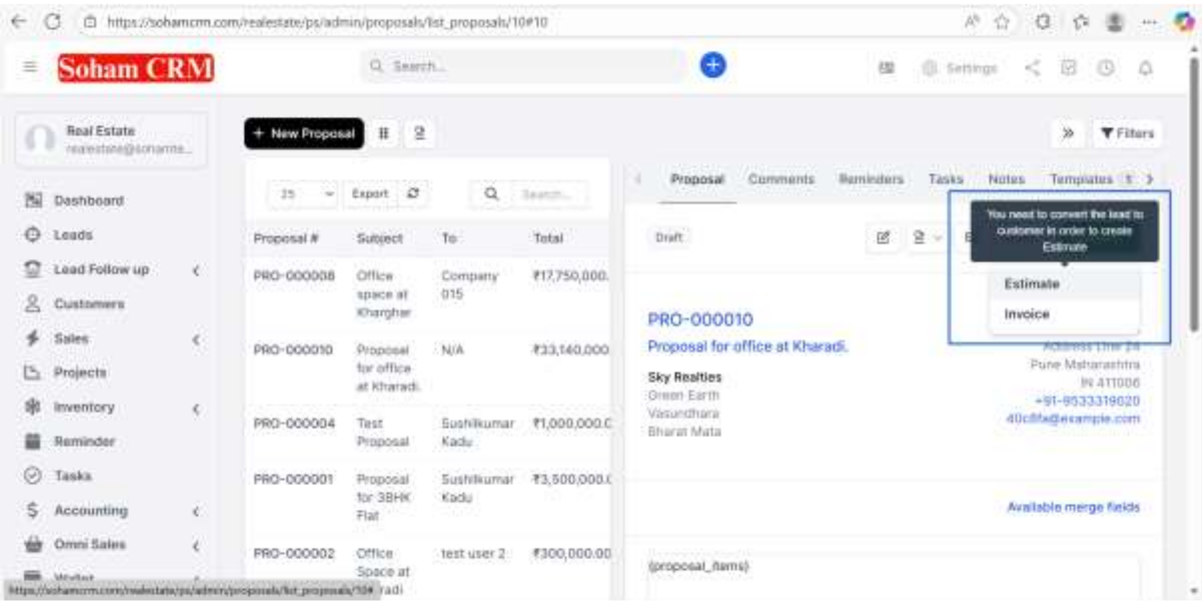
iv. After filling all the related information select **Save & Send/Save**.

5.3. Estimates:

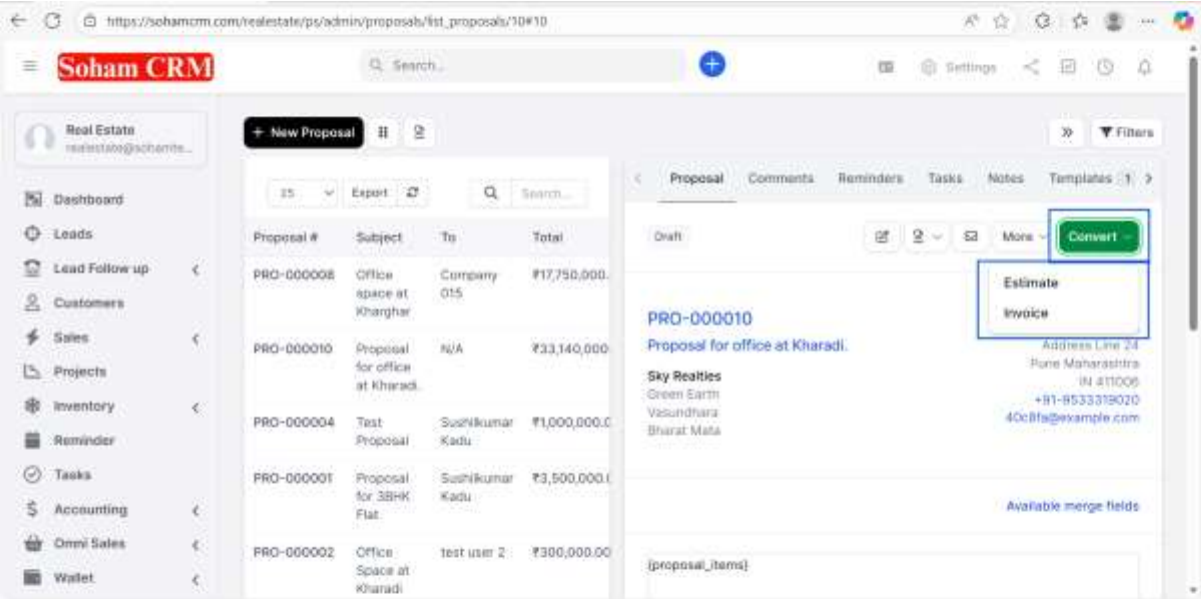
-Estimates gives the customer final idea about the pricing before billing.

-Estimates can be created through Estimates under Sales or by converting a related proposal to Estimate.

i. To convert a Proposal into Estimate select the **Proposal** that is to be converted. For a proposal that is related to a Lead, the Lead first needs to be converted into Customer till than the Convert to Estimate option remains disabled.



ii. After converting a Lead into a Customer, a proposal now can be converted to estimate. To do so, click on the **Convert button** on the proposal and select **Estimate**.

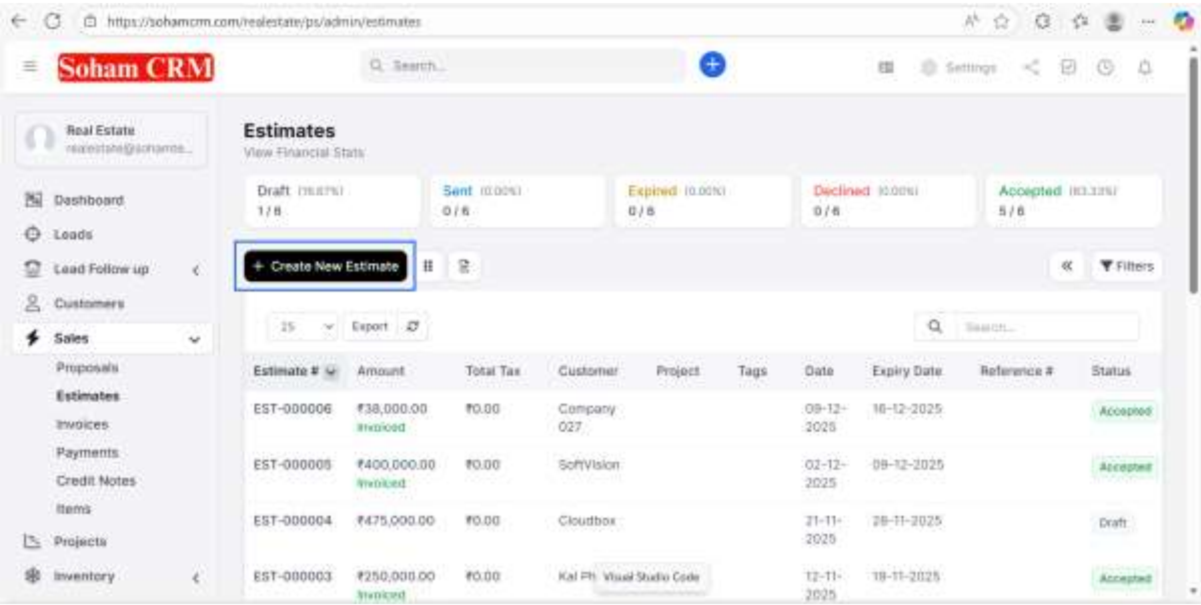


iii. After converting to Estimate, fill all the necessary information in the fields. At this point you can also perform changes and additions to the estimate.

iv. Click **Save** to save the estimate, post which it will available for sending.

-To create a new estimate, select **Estimate** from **sales** in the main menu.

i. Click on the **New Estimate** button to create a new estimate, fill all the information in the fields, select the items and click **Save** to save the estimate.

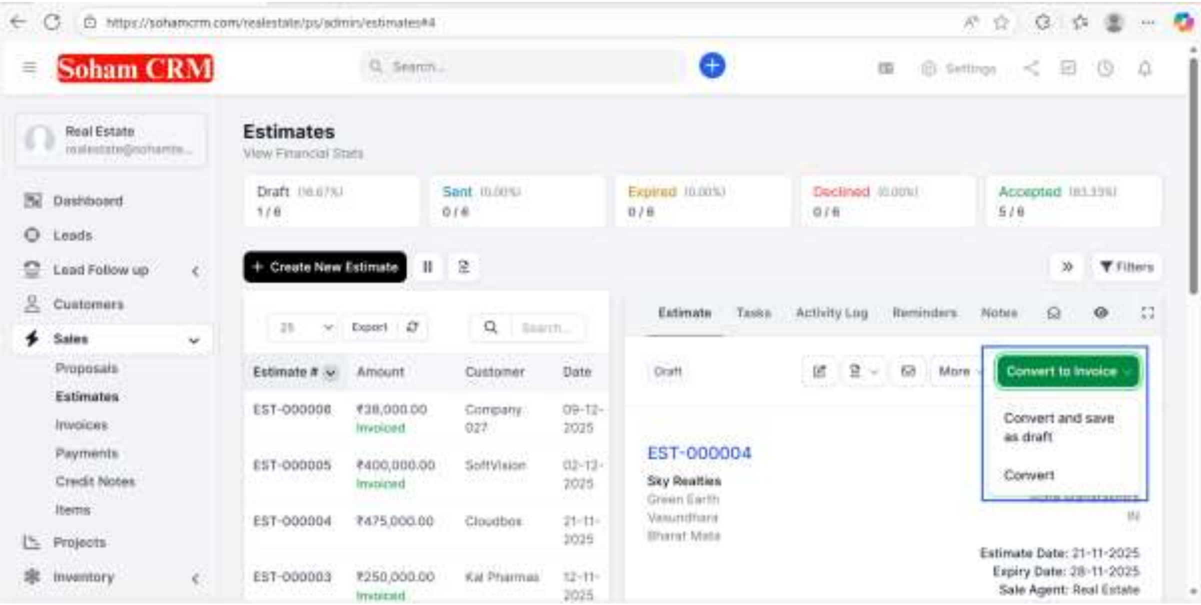


5.4. Invoices:

-Invoices are final bill that is been generated and the payment regarding the items is recorded against the invoices.

-Invoices are related to the customers and can be either directly created through main menu or by converting an existing estimate into invoice.

i. To convert an estimate into an invoice, open an **estimate** and click on the **Convert to Invoice** button. Select from **Convert and save as draft**; it will convert to invoice and save it as draft/**Convert**; it will convert to invoice and the payments can be recorded for this invoice.



-To directly create an invoice,

i. Select **invoice** under the **sales** from the main menu.

ii. Click the **Create New Invoice** button and fill the information in the field visible.

iii. Select **Save as Draft/Save/Save & Send/ Save & Send Later/ Save & Record Payment** to save and proceed further with the invoice.

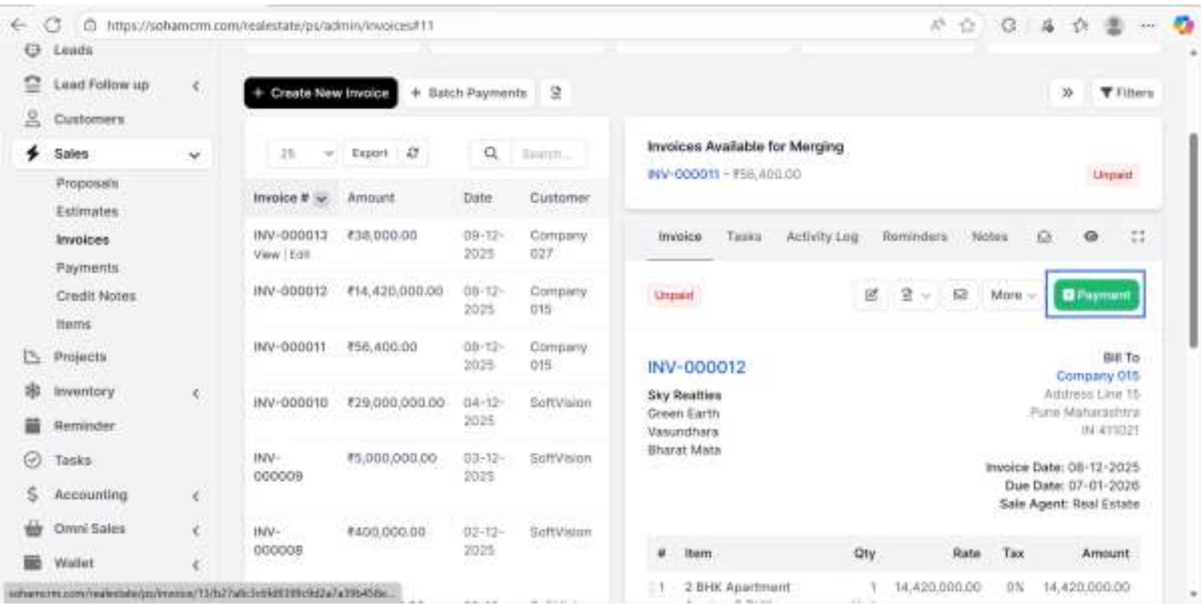
5.5. Payments:

-Payments tab shows all the payment transactions recorded and the details of those payments.

-payments are recorded for an invoice, either by selecting payment option provided on the invoice or by selecting the batch payment option available on the invoice page.

i. To record payment on the invoice, click on the **Payment** button, fill payment details and click the **Save** button to record the payment.

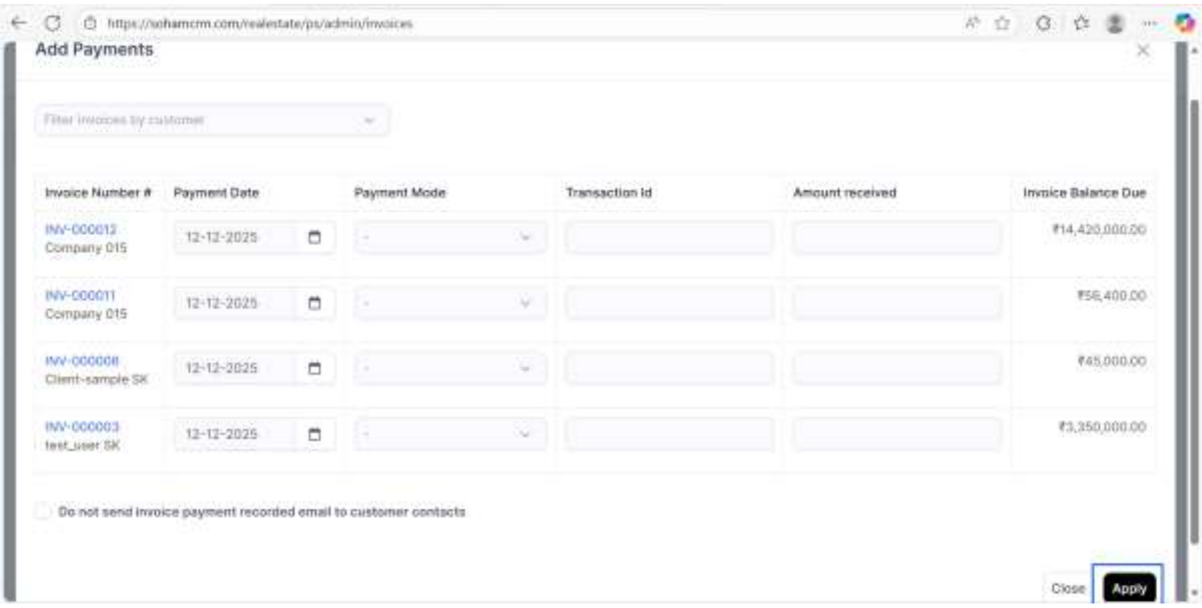
ii. You can register as many as payments for one invoice until the total invoice amount is received.



-Batch payments are used to record payments for multiple invoices in a single go, rather than opening every invoice one by one to make a payment entry. Batch payments consists of all the unpaid and partially paid invoices records to make payment entry.

i. To record payments using batch payment feature, click on the **Batch Payment** button on the **Invoices** page.

ii. Fill the payment related information on all the desired invoices at once and select the **Apply** button at the bottom. This will update the payments and amount due for all the invoices updated using batch payment.



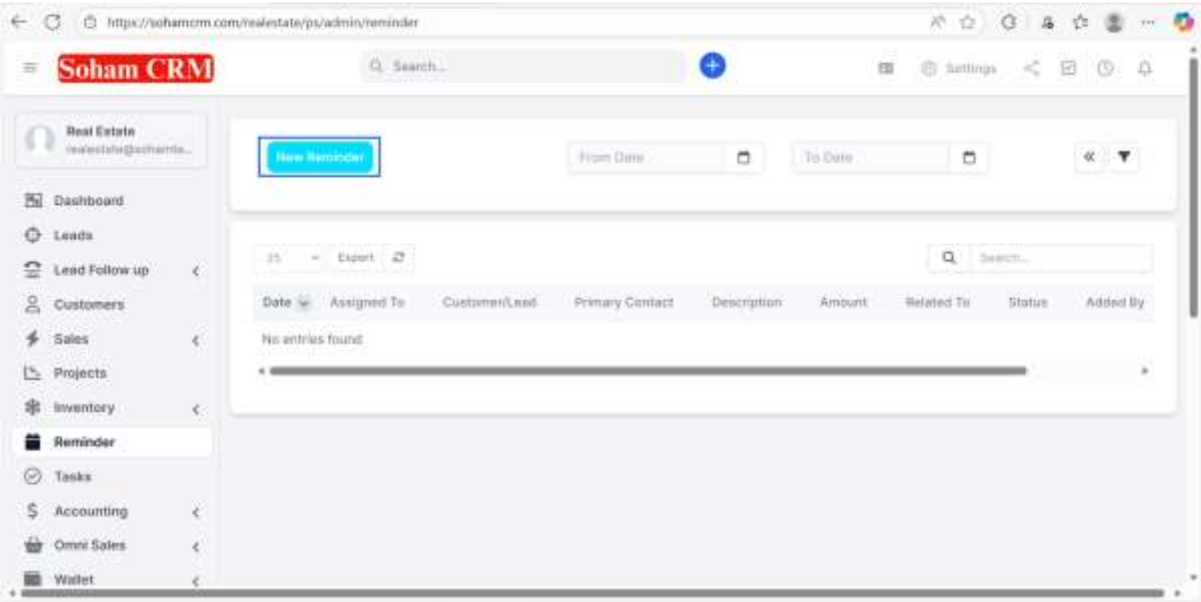
6. Projects:

7. Reminders:

-Reminders can be set related to a lead or a customer. This can be also assigned to a user while creating the reminder.

-To create a reminder,

i. Select **Reminder** from the main menu. On the reminder page, click on the **New Reminder** button. Fill in the field information and click **Save** to set up the reminder.



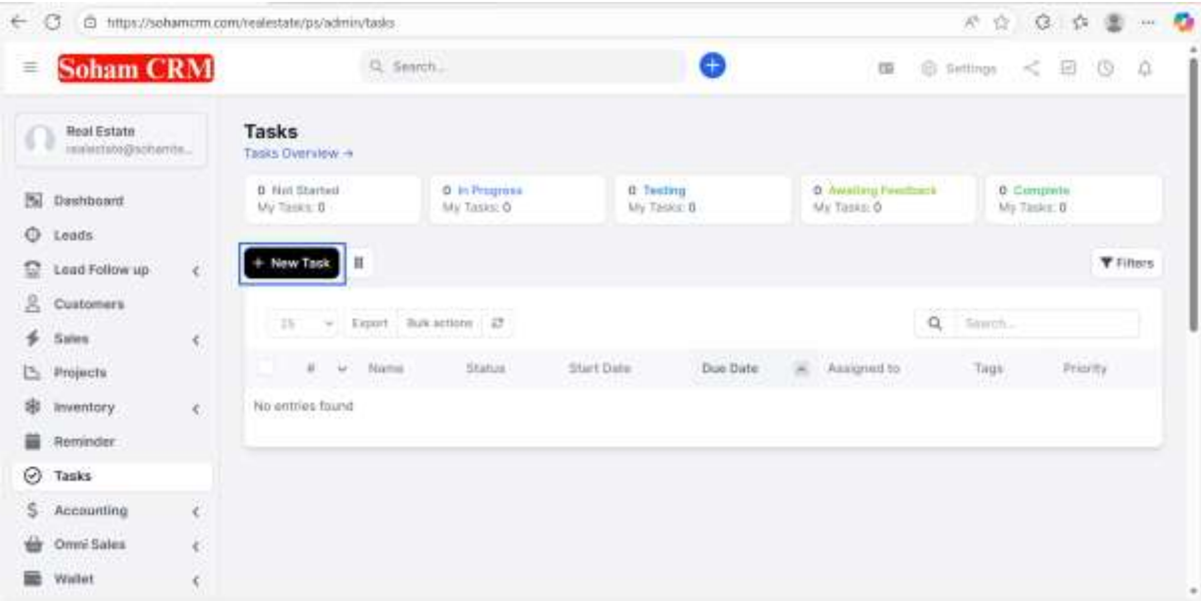
8. Tasks:

-Tasks can be created and tracked to increase the productivity and deliverability of the team.

-Tasks can be assigned to any of the user and can also be followed by the selected users.

-To create tasks,

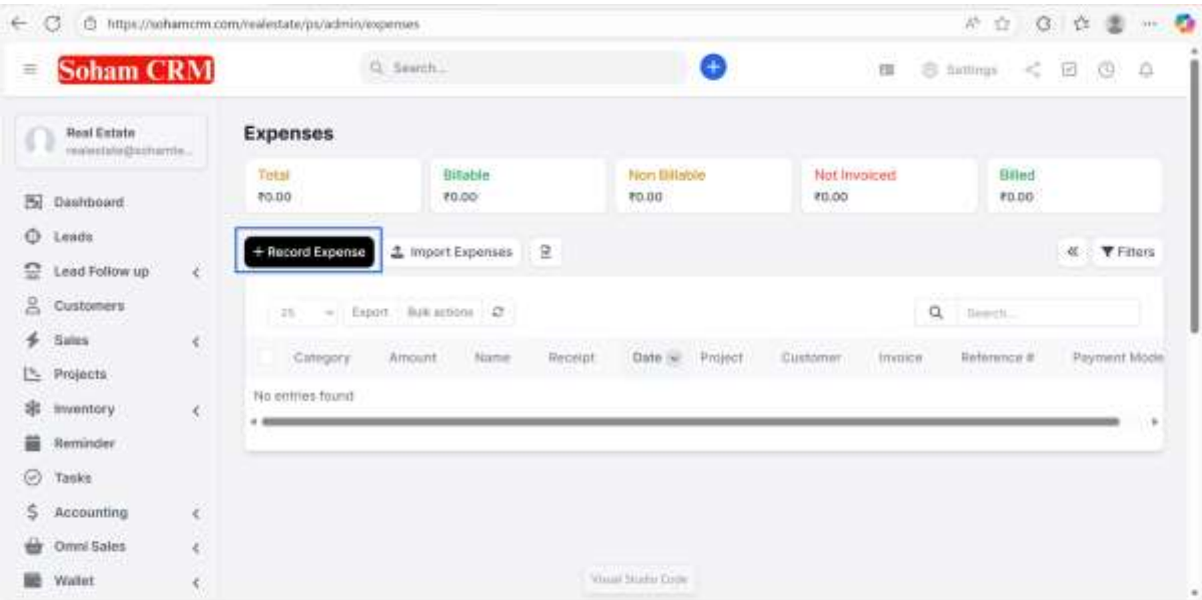
i. Select **Tasks** from the main menu and click on the **New Task** button, after filling in all the fields, click on the **Save** button.



9. **Expenses:**

-Expenses can either be created or imported into the CRM System.

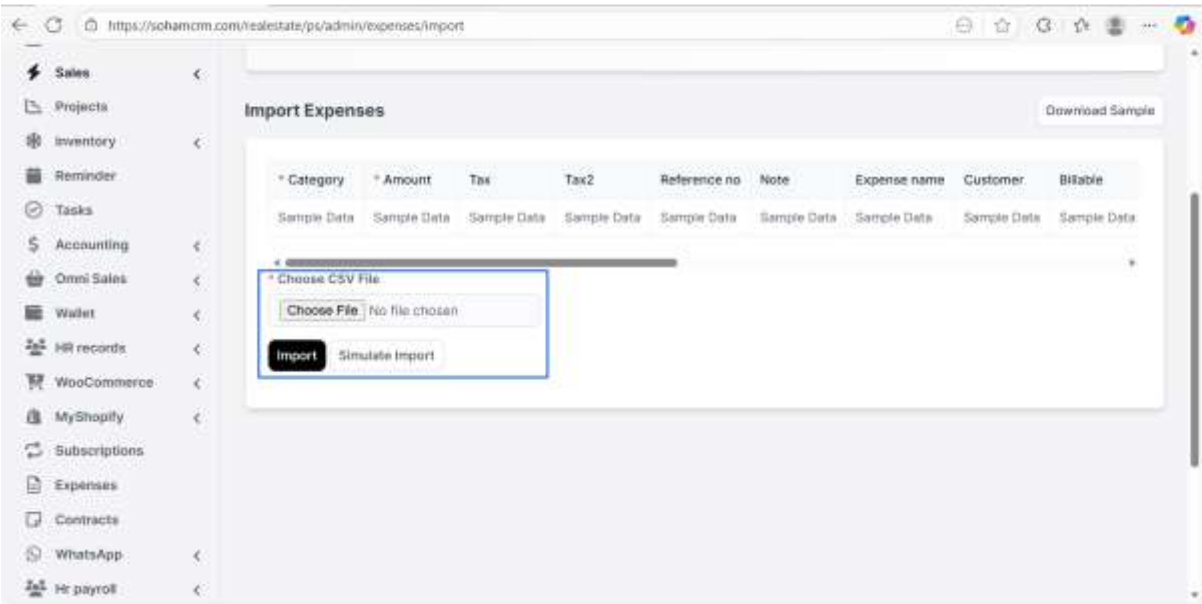
i. To create an entry for the expenses in the CRM System, click on the **Record Expenses** button on the **Expenses** page. Fill the information and click the **Save** button at the bottom of the form.



-To import expenses into the CRM System,

i. On expenses page click on the **Import Customers**.

ii. Click on the **Choose File** button to select and import the file in the CRM system. Make sure that the file is stored in the **.CSV** format.



10. Contracts:

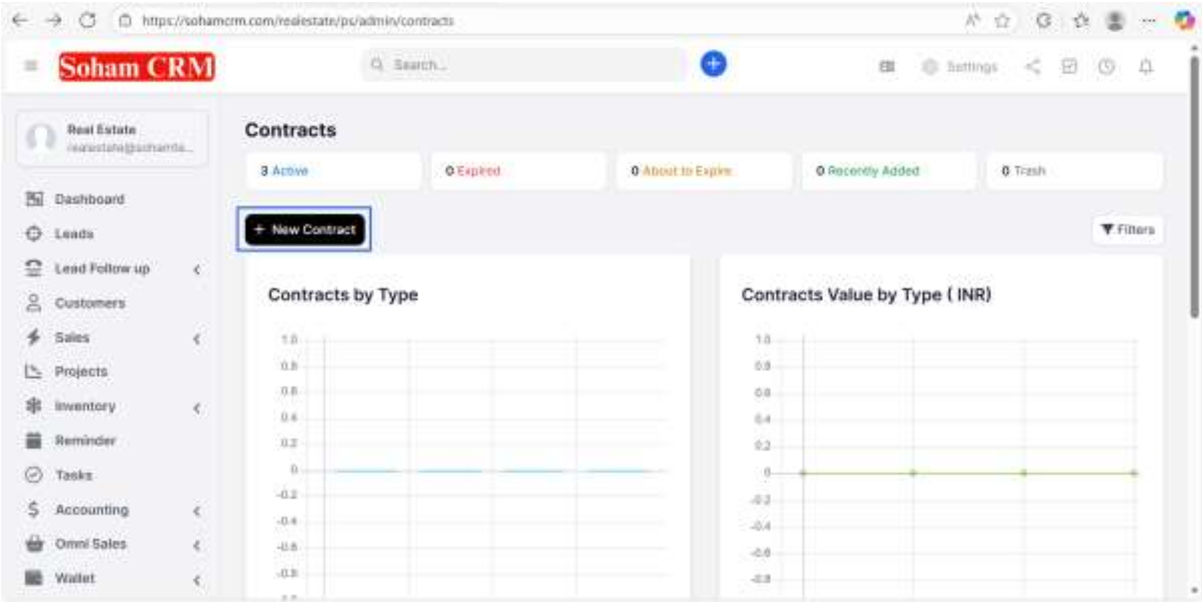
-Contracts can store and also helps tracks the start and end of all types of agreements done with the customers.

-Contracts can be either created through main menu or from by selecting from the customer profile.

i. To create a contract from the main menu, select **Contracts** from the main menu.

ii. Click on the **New Contract** button on the Contracts page, fill up the information regarding the contract and which customer it is related to.

iii. Click **Save** after once the information is filled, this will create a new contract.

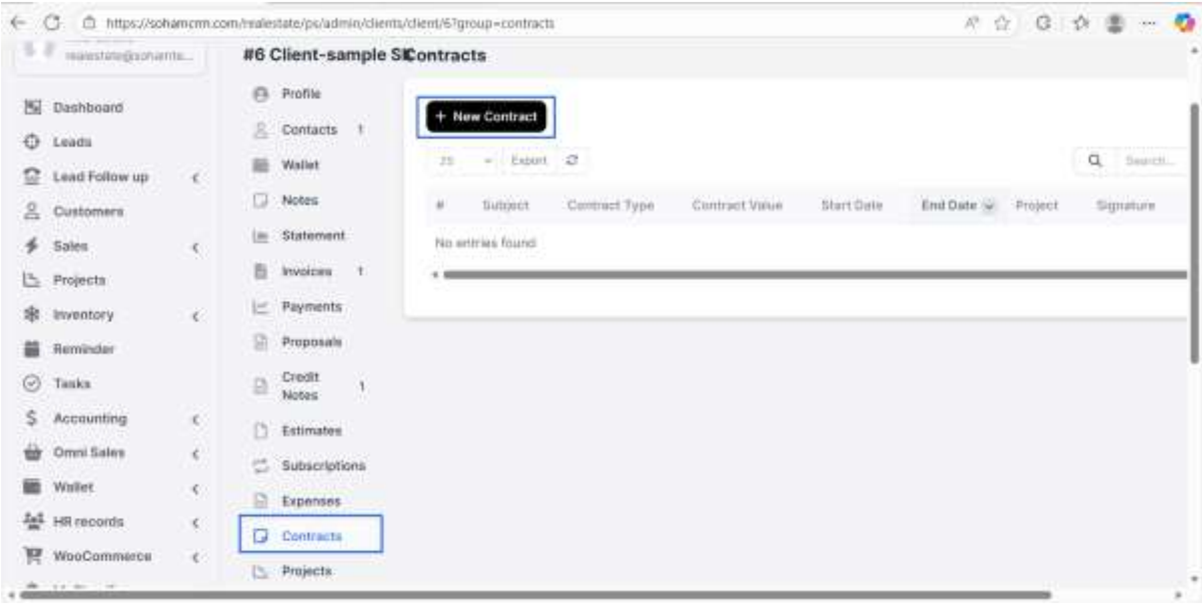


-To create a contract through a customer profile,

i. Select a **customer profile** from the customers page.

ii. In the customer menu you will find the **contract** tab, select the tab.

iii. Click on the **New Contract** button, fill the information and click **Save** button.



11. Reports:

-Under Reports in the main menu you can find following modules form which reports can be viewed:

- Sales
- Expenses
- Expenses vs Income
- Leads
- Timesheet overviews
- KB Articles

11.1 Sales:

-In sales you can generate reports based on different parameters and filter for following modules:

- Customers Report
- Proposals Report
- Estimates Report
- Invoices Report
- Payments Received
- Credit Notes Report

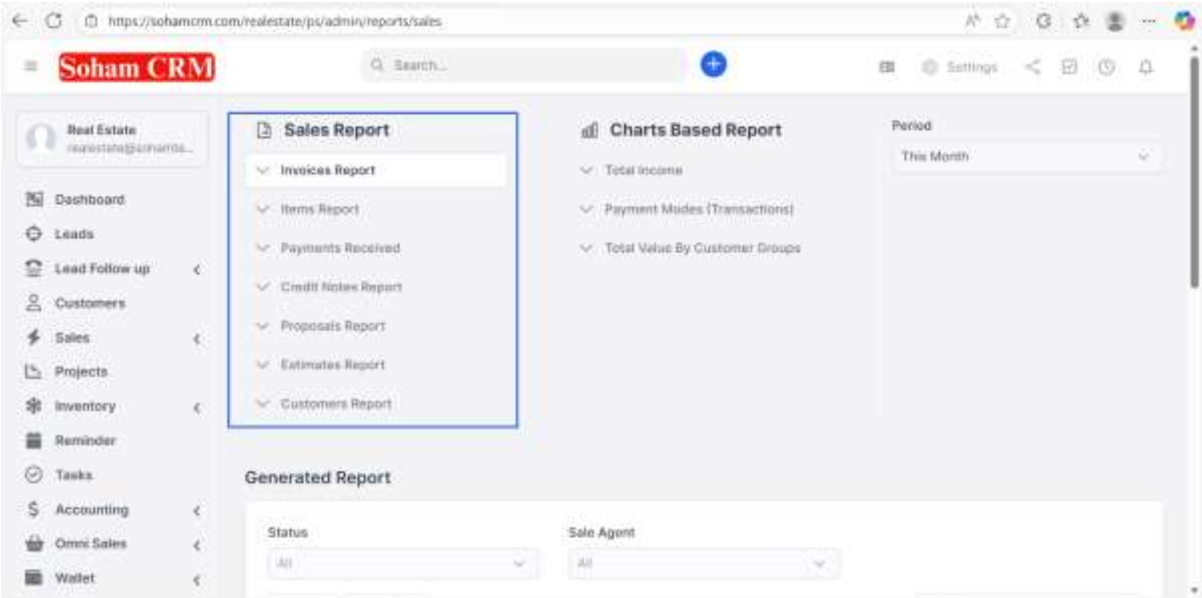
-These reports can be viewed and exported in Excel/CSV/PDF and Print format.

-To export a report,

i. Select **Reports** from the main menu of the CRM system.

ii. From the drop down select **Sales**.

iii. Select the report you want to view from all the available reports.



iv. To export the report, select the **report** and click on the **Export** button placed above the report. Click to select your desired **format**. This will export the report to your local system.