

CRM Help Guide – User Role

Access CRM At : <https://shreenathmobis.in/CRM/>

1. Login

- Go to the login page.
- Enter Username and Password.
- Click Login.



2. Leads Page

- After login, you land on the Leads dashboard.
- View leads with Name, Mobile, Email, Source, Status, Manager, and Time.
- Use the search bar to filter by name, email, or mobile.
- Use filters (source, status, manager) to narrow results.
- You can:
 - Add a Call Lead or Webform Lead
 - View lead details (👁 icon)

CRM Leads Click to Logout Logout

Leads

Add Call Lead
+ Add Lead
Click to add new lead

Search by name, email, or mobile Search by name, email, phone etc

status: Open Reset filters

View, remove or reset filters here

Name	Mobile	Email	Source	Status	Manager	Time	Actions
Dulvir	123456665	kav@gmail.com	Call	Open	Laxmi	02/06/2025, 10:45:12	👁️
saif	12345678	admin@example.com	Webform	Closed	Kavita	02/08/2025, 16:43:10	👁️
om	12356790	Builder@example.com	Webform	Open	Laxmi	02/08/2025, 15:43:12	👁️
oibu	95554556	fhngag@gmail.com	Call	Open	Laxmi	23/07/2025, 16:50:48	👁️
saetple	259614521	s@e.com	Call	Open	Laxmi	23/07/2025, 15:19:05	👁️
new1	12356788	admin@example.com	Call	Open	Super Admin	28/07/2025, 11:41:08	👁️
New	12356795	Builder@example.com	Call	Open	Super Admin	28/07/2025, 11:41:08	👁️
Nikhil Gavit	9733002211	nikhil@example.com	Call	Open	Sonali Mahadik	28/07/2025, 10:51:20	👁️

Sort and apply filters by options from the dropdown

Click on eye icon to view lead details and followups

3. Add New Lead

- Use the sidebar buttons:
 - Add Call Lead – for phone inquiries.
 - Add Lead – for webform or manual entries.
- Fill in required fields and click Submit Lead.

Add Call Lead ✕

Name

Email

Mobile

Select Manager

Open

remarks

Submit Lead

Add Webform Lead ✕

Name

Email

Mobile

Select Manager

Webform

Open

Submit Lead

4. View Lead Details & Follow-ups

- Click the 👁️ (eye)View icon to open full lead details.
- You'll see:
 - Lead information (Name, Mobile, Email, etc.

In details Add manager from dropdown if not assigned

- Past follow-ups (Call, WhatsApp, Onsite,etc) with time
- Scroll to the bottom to add a followup:
 - Select type (Call, WhatsApp, Visit, etc)
 - Enter message
 - Select manager
 - Click + Add

The screenshot shows the CRM interface for 'Lead Followup History'. At the top right, there is a 'Back to Leads' button and a 'Logout' button. A green arrow points from the 'Back to Leads' button to a green callout box that says 'Click to go back to leads list page'. Below this is the 'Lead Details' section, which contains a table with columns for NAME, MOBILE, EMAIL, MANAGER, and DATE/TIME. A green arrow points from a green callout box labeled 'Lead Details' to the table. Below the 'Lead Details' section is the 'Followup History' section, which contains a table with columns for Followup ID, Type, Message, Manager, and DATE/TIME. A pink arrow points from a pink callout box labeled 'Lead Followup History' to the table. At the bottom is the 'Add New Followup' form, which has fields for Followup Type (dropdown), Message (text input), and Manager (dropdown), and an '+ Add' button. A blue arrow points from a blue callout box labeled 'Fill form to add new Followup' to the form.

5. Logout

- Click the red Logout button at the top-right of the page.

