

Welcome to CRM Online Help

Salespeople - Our CRM software helps you to manage customers and leads, which includes daily communications, setting follow-up reminders, sending and replying to emails, sending out marketing emails, and tracking marketing campaigns. Managing and keeping track of all your customer interactions is a necessary and vital aspect of your business.

CRM will reduce admin with all your customer information in one place. The result - less time on inputting data, more time in customer engagement, optimising customer experience. Using our CRM module will help you build customer relationships, increase sales, improve customer service and ultimately increase personal commission and company profitability.

Sales Managers - CRM empowers your company to more effectively manage their interactions with customers and potential customers. You can access reliable information, such as the progress of individual team members in achieving their sales targets. You can also see how well a particular sales team, a company product or company campaign is performing.

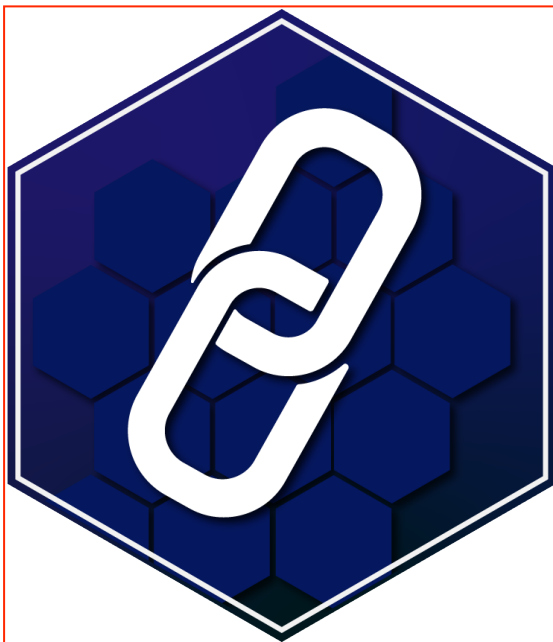
Quick Links



[What is CRM?](#)



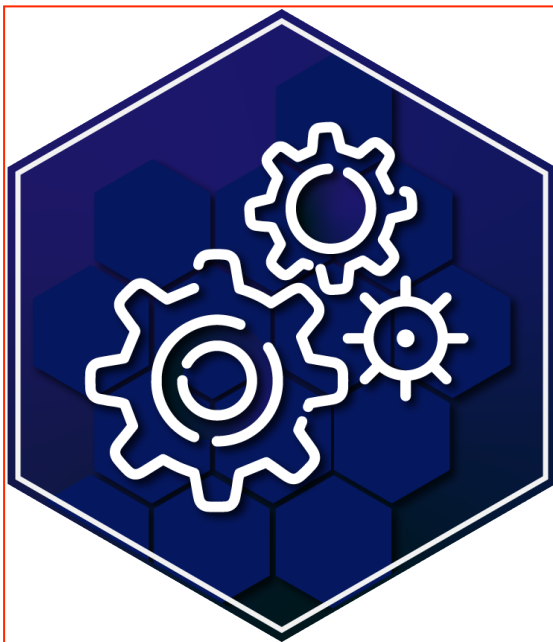
Configuration Notes and Security Rights



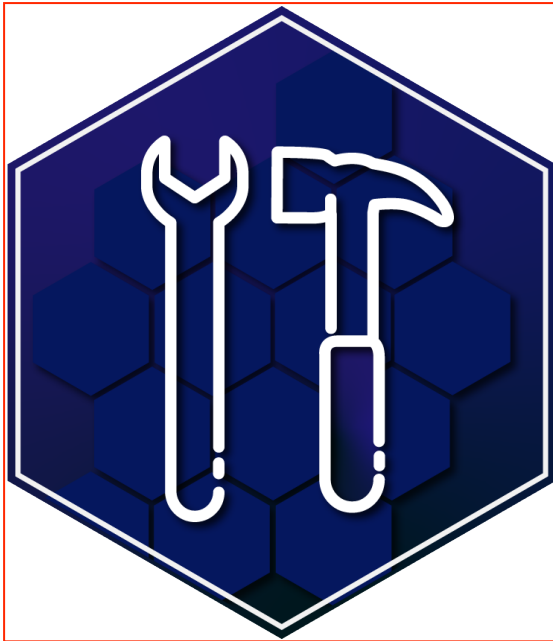
Interface Functionality



CRM Dashboard



General Settings Configuration



Settings



Homepage Tiles



Customers



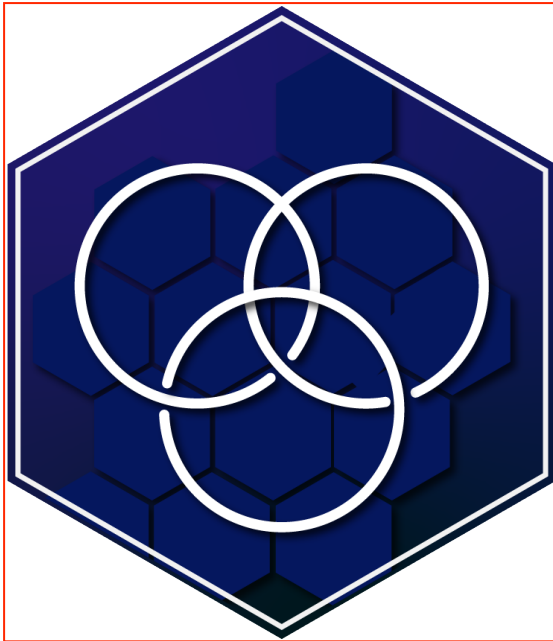
Activities



Quotes



Reporting



[Companion Apps](#)

Latest Updates

BPOCRM: v3.6.4.1 Release

LP03

