ZimDoc CRM

This will be divided into 3 major parts

1. CRM for managing pipelines
2. Campaign for Email templates and Mass messaging and newsletter
3. Desk for managing tickets and HR

The CRM workflow.

This covers the core feature of the CRM-

**Contacts.**

**Adding contacts**

Adding contacts is simple - just use the "Add" button to create these records easily or use the import option if you're wanting to create records in bulk.

On the contact, we can add customization so the users might see some fields that are specific to different industries, but any admin can customize fields from the Custom Fields settings. Here, you can add all sorts of field types to your contacts or your companies.

Like, I want to know where I got someone's contact information so I will add a "Source" drop down field, but you can add all sorts of fields here, so definitely go through your custom field settings to add what you need

When you are filling out a contact's information you will see a field for their company - if the company already exists, just search the name to link the contact to that company.

 Once everything is filled out hit "Create." Every contact and company you enter will have a profile like this - it is meant to be the single source of truth for everything you know about that person. You can see all the details that you filled out about them on the right, including that company's information.

 You set reminders to follow up, create events with this person when you have meetings scheduled, you can attach files related to this person and more

**History and notes**

At the bottom you will see the contact's History, which is a feed showing all of your updates and activity with this person. As your relationship develops, this page becomes a pretty priceless source of information. If you need to take a note, just jump to the history to save important information about a conversation, an interaction, or just any important context about your relationship .The history shows past notes, logged emails, completed tasks and events, and pipeline updates from everyone on my team so that I can oversee communication and see what the team has done with this person too. If you linked this contact to a company, you'll also be one click away from that record too, so that you can see all of the activity with the contact at that company in one place. So if you are more focused on companies, you can also take notes and attach items from the company record too.

**To Filters and search**

find a specific record, just search for it in your navigation bar. You can search by any field on your contacts and companies - like name,s email addresses, phone numbers, addresses, custom fields - no matter what page you're on, you can always search to find the contact or company that you need. To see all contacts, just head to your Contacts page.

This page holds every record ever created in your database, so you'll normally sort or filter this page depending on what you need to see.

Sorting this list allows you to adjust the order of the records. For example, I'm going to sort by the date contacts were last updated to keep some contacts from slipping through the cracks.

Filtering is narrowing this list down, so a couple filtering examples - I'm going to filter to see

only company records and set it as default. If you're more B2B you can do this if you really only want to see company records. Or, you could set your filters to only show your assigned records if you want to stay focused on your stuff. This "Add a filter" option lets you narrow your list down by a specific field.

**TASK**

A tasks is any to-do item— sending a follow up email or ordering

more office supplies. Events, on the other hand, are more scheduled, so they have a date and time, so an event would be a team meeting, or an appointment with someone.

**Adding tasks**

You can add a task anywhere from the “Add’ button, just fill out the name of the task, set its due date and, if you’ve got sub calendars, be sure to add it to the right sub calendar. You can create sub calendars from your Calendar settings, just to make your task lists a little bit more organized and color coded. If your task is about a person or company, you can link it to that person or company here. Just set the task, and then you can forget about it - the CRM will remind you on the day the task is due in your daily agenda email and in your Calendar, so you can get back to work. You can also add a task directly from any contact or company record

**Viewing tasks and Notification Alerts**

CRM will send you an agenda email outlining all of the tasks and events that you have due that day, but if you want to see that list inside of your CRM, just go to your Workspace. You’ll find all of your current as well as overdue tasks here, but you can always customize your Workspace's widgets to see only the specific to-do's that you might want to see.

Tasks that are linked to contacts will always show up at the top of the contact record, too. And once you have followed up with that person, or completed the task, that task will drop into their history, along with the rest of your logged emails, notes, and other updates. The calendar holds all of your event and tasks, too, and from the calendar, you can choose to see only your own tasks, or the tasks of your team, as well. If you need a more robust view of tasks, check out the the task report. You can filter this report to see your completed tasks for the week, or the tasks that you have planned for next month. Or, you can view a teammate’s tasks.

**Calender**

calendar is for keeping your business organized, but the difference with our calendar is that your events are directly tied back to your contacts and companies, which means those events are tied in with every other meaningful interaction you've ever had.

Additionally, we will have Integrations with Google and Outlook calendars so that your events are syncing back and forth automatically.

**Adding events**

Adding an event, just use the "Add" button. Fill out the information about the event's date and time and location.

This little availability calendar peeks into your full day so that you can choose to move your meeting whenever you have some free time, and you'll also add any attendees to this

event here CRM users or contacts both count as attendees, and your CRM users that you add will get an emailed notification when you add them.

You can also create an event right from the contact or company record under

**"Attach an item."**

You'll see upcoming events at the top of their record here, and when the event is over, it just drops into the contact's history.

Your Workspace can also show the day at a glance but can be customized to show whatever events that you want –

If you are not on the Workspace but you want to just peek at your agenda for the day, just hover over your nav bar here or you can click into your main calendar page and there you'll see the shared calendars of your team and other important dates like birthdays or custom fields that you've had set to show in the calendar.

**Notifications for tasks**

Each day, the CRM will send you a daily agenda email. This is like a personal assistant- it's just a little reminder every day of all the events and tasks that you have due or coming up that day. However, you can also get individual email or text notifications about each event too

By default, we will send you an email 15 minutes before any event starts, but you can change the time or amount of default notifications that you get from your notification settings.

Also, I think sub calendars are a great way to add some organization a little bit of structure to your calendar. Sub calendars also allow you to color code specific events and tasks.

You can create sub calendars from your calendar settings, for example let's say you want to

keep certain events and tasks private from other people on your account- no problem,

just create a sub calendar you can call it "personal" or whatever you'd like, and then

just set the visibility for it to be private to only you.

Or, maybe you have some really high priority tasks or events that you want to just keep

like red on the calendar - you could create a sub calendar for high priority things and

those will always be marked in that red color.

As a note about this - if you have other users on your account, they will always just see

your calendar as one calendar under your name.

**Pipeline:**

One very important feature of the CRM is pipelines. A pipeline is a way to track any process or workflow from start to finish, it will help us focus on the people who are the highest priority, we are going to be using the pipeline for tracking things like sales, leads, but pipelines can be customized for just about anything. So if you need to track recruiting, or customer service tickets, or business development operations - you can track all of that and more with pipelines.

Using pipelines

Start on the contact or company record that you want to work through your pipeline. In

that "

 just select the pipeline that you want to attach. We will have one

have a simple "Lead"pipeline listed here, but you could have a differently named pipeline

or more than one pipeline to choose from- just depends on your setup.

Next

We can add the functionality to choose the appropriate status for this contact or company and fill out any custom fields - it is almost always best practice to also save a note for a little bit of context and set yourself a task to complete the next thing or you can assign that task to somebody else on your team. Then we'll save it.

NEXT

This will help users tell exactly where this contact stands in my pipeline at a glance we can add a badge or color either RED YELLOW OR GREEN to update their status whenever that time comes. Continue to move this contact through the pipeline updating custom fields, taking notes along the way, until they've reached one of the closed statuses. This

history is all logged on the contact so they have a comprehensive view of their life in the pipeline.

NEXT

If you're using pipelines to track items that might repeat, such as orders or policies,

you might attach a pipeline more than once to track each order or policy separately.

NEXT

if you have imported a file of new contacts or companies you can also add them in bulk

single stage of your pipeline from the finished import page - just saves you a bit of time!

**Customization**

We're going to talk through how to customize a pipeline in this section

"Edit" option because you may just need to tweak a few things instead of building one from the ground now that your pipeline is customized you can start putting people or companies through it.

NEXT - Pipeline reports

The contact or company is great for seeing all the pipeline activity with an individual, but use the pipeline report to see all of your leads in one place. The contact or company's basic information is right here, and you can easily view their pipeline information.

 On that badge, just click it to update the pipeline's info. You can set a task or take a note from here, your whole team can also access this report to view one another's progress,

but you could also filter it to see a specific team member's work in the pipeline.

You can always export to excel to calculate total values or print a PDF to send a copy off.

You can also use these filters on the left to pull some specific reports.

So maybe you want to focus in on just your prospects - filtering by status lets you narrow in on them. Or pull a report on all the sales that you won last month for a specific service of yours. I'll add this "Add a filter" option to filter by my custom field and find everyone who is interested in a specific service.

If you're tracking orders, you could find all of your completed orders for last month and export that list to total up last month's sales. The possibilities here are kind of endless, so try stacking a few filters to get the report that you need. Once you have started using the pipeline you can always go back and add another status or custom field in the future.

**Grouping**

Groups are probably the easiest way to organize your CRM. A group is just a list of contacts or companies that share something in common, and these groups or tags or labels are a really easy way to add a bit of structure to your database. You could create groups for just

about anything - you could create a list of all of the contacts that you met at a conference,

or maybe you want a list of all of the companies in a specific industry. You could create a group of just all the personal contacts in your CRM - you really can kind of customize these groups for just whatever you want to categorize or organize in your database. One thing that I will mention right off the bat, though - if you are looking for a way to have more progress related groups.

like you want to track prospects or some sort of process in your business,

**Email Address**

To send emails you're going to be using the same tool you are already using,

so whether that's Gmail, Outlook, or something else. But, there are a couple ways to use

that tool in tandem the CRM. Let's talk about launching emails from the CRM first. I use Gmail, so I just want to tell the CRM first on my settings page that I use Gmail. Now, whenever I click on an email address, the CRM will launch a new message in Gmail to that email address. This is a super handy way to start a new email-it just saves you that hassle of copying and pasting email addresses from the CRM into Gmail or whatever you use.

**Phone Access**

Our Phone access is designed to work on any device, so no matter where you are, you always have access to everything. There's no app you have to download, just head to your browser on your phone or your

tablet, and log in. And, if you pin the site to your homescreen, that can make getting to your CRM even fast.

Let me show you how. If you’re on an iPhone, pull up Safari and log in, we’ll always take you to your workspace,

but if there’s a different page you want to see first, just go there now. Now click the share button…..and choose "Add to Home screen," so you can list this

Shortcut with the rest of your apps. Android user? Pretty similar flow - log into the CRM on Google Chrome, click the menu button here,

and choose “Add to home screen.” Give it a name, and you’re just a click away from your CRM. On your phone, the navigation will be slightly different than on a desktop or laptop.

Let me show you around. The main navigation will appear along the bottom of the screen, so just click on one

of these icons to go to your Workspace, your contacts list, or your Calendar.

Or, you can always select the three dots to expand your navigation bar so it shows up

just like it does on your computer. If you need to take additional actions on a page, just select the menu here to have

some more options for sorting and filtering, viewing other calendars, and more.

**Integration**

Integrations are great it’s important to keep as much about your

business in one place, which is why we will built integrations with other software tools you might already be using, such as Google Calendar, Outlook Calendar, Google Contacts, Mailchimp, twilo and Zapier

You can setup most of these integrations from your Integrations Settings.

Our integrations with Google and Outlook calendars let you sync your events,

so you’ll never miss a meeting and you can see your event history with a contact.

Or, integrate with Google Contacts to enter a contact once, but have it show up in both systems. Finally, if you need to send emails to groups of people for things like a newsletter,

use our Mailchimp integration— your mailing lists will sync, and you’ll have a record of your email marketing campaigns in the CRM, too. Zapier is great for automating workflows between platforms, without needing a developer. With our Zapier integration, you can connect your CRM to thousands of other platforms, and create Zaps that update leads automatically, create contacts, and more. Setting up any of these integrations is really easy. Just head to your Integrations settings. page, click to setup whatever integration you want, and we’ll walk you through each step. Plus, from each integration’s settings, you’ll see a whole tutorial just for that integration if you need to learn more. You’ll also see some third party integrations here - these syncs were not built by us, but you can give these apps access to your CRM to connect with even more. Finally, be sure to check out our integrations directory for a full list of our in-house and third party integrations. If you have any questions about any specific integrations, or how something works, just give us a shout and we'll be happy to point you in the right direction.

**Newsletters**