

› About SoulCRM

SoulCRM is incredibly simple and efficient web based CRM software specifically designed for Indian businesses, it's a complete business solution that connects your business across marketing, sales and customer support departments.

- **Why SoulCRM?**
 - It's flexible to adopt your business processes
 - Easy to learn and operate for you and your team
 - We understand your budget too
 - Automate sales, marketing and support processes
 - Security and protection
 - Cooperation and sharing
 - Pointing market target is an easy job now
 - Speed increase and efficiency
 - Management decision in minimum time
 - No space for confliction or misunderstanding

- **Modules**
 - Contact Management
 - Marketing Automation and Email Campaign
 - Task Management
 - Appointment and Calendar
 - Sales Automation
 - Accounts and Inventory
 - Voucher Management
 - Support and Contract Management
 - Document Management System

We will cover the entire SoulCRM in a flow to make it easier for you to configure your system using this document.

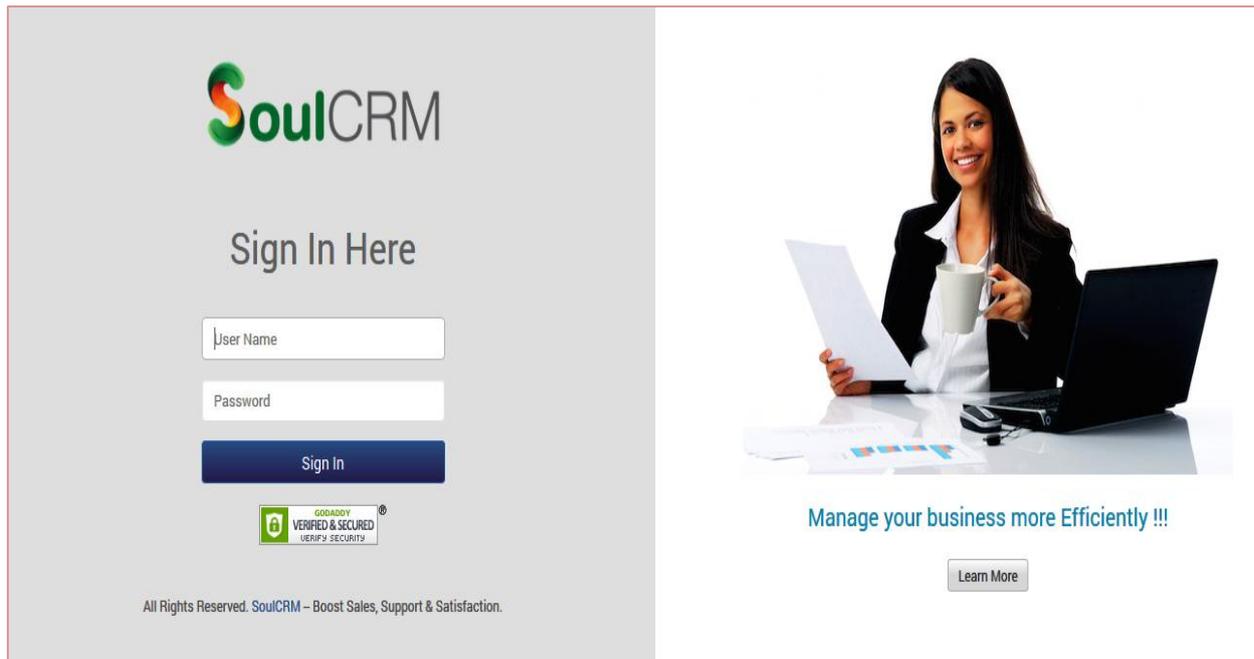
› Logging into SoulCRM

To use SoulCRM, write the SoulCRM application URL [<https://<companyname>.mysoulcrm.com>] in your browser address bar.

Example: <https://democompany.mysoulcrm.com>

User need to specify correct and complete login details provided by SoulCRM Implementation team, after entering the login credentials user can experience SoulCRM.

The page appears as below.



- Write your account **username** in Username field.
- Write the **password** in Password field.
- Click on **Sign in** button to Log into the system.
- Enjoy using your Happy Hours...

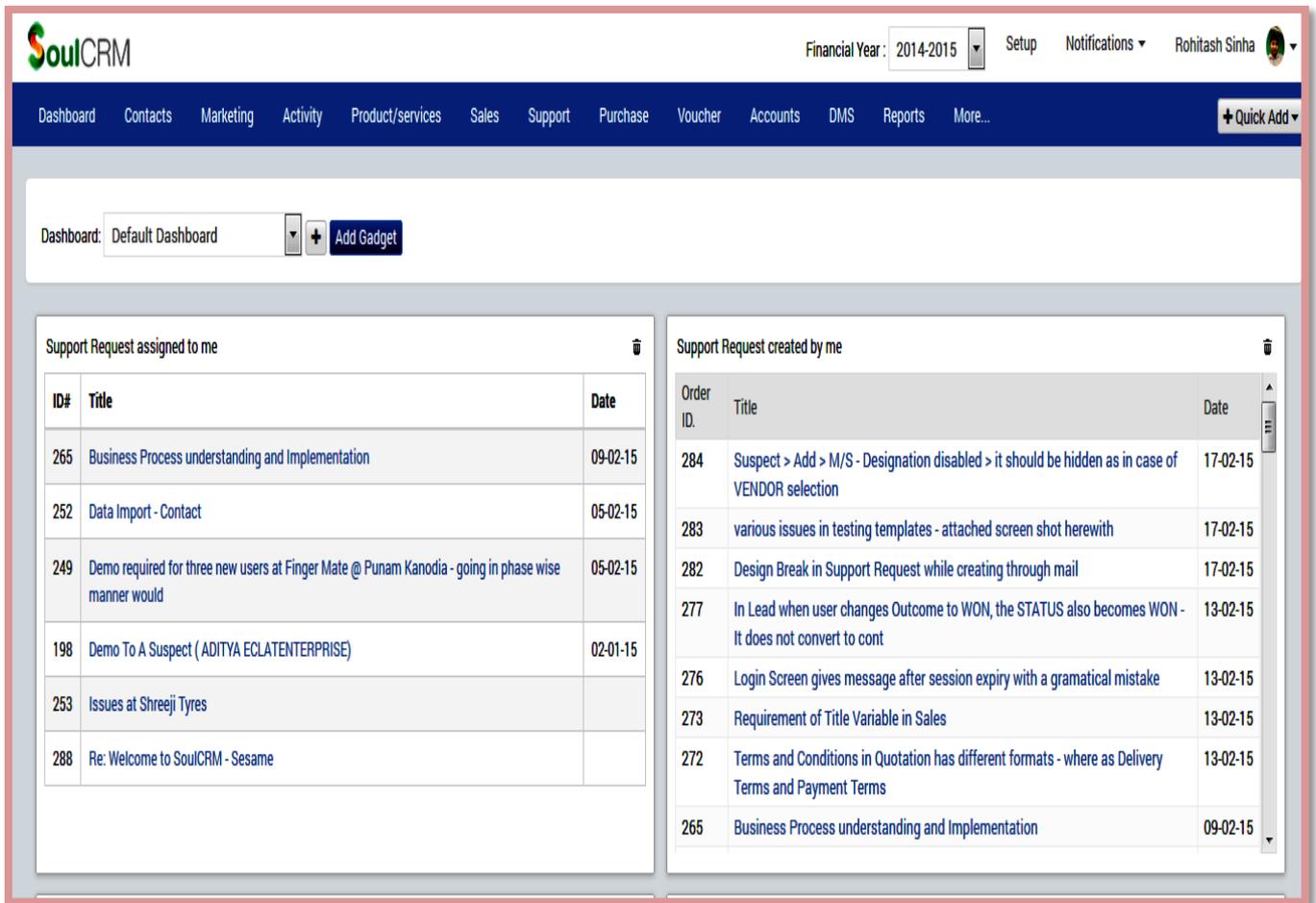
Dashboard

After login, the first screen of SoulCRM is the **Dashboard**. This interface helps you have a quick overview of your day to day operations through various gadgets.

You can configure **multiple dashboards** and add gadgets to them. A maximum of **6 (six)** gadget can be added per dashboard.

- SoulCRM allow user to add all the available gadgets in his dashboard, but user needs to have **Rights** for the same else he won't be able to **access** the gadgets

The Dashboard appears as below.



> Setup

- Now the first step towards configuring SoulCRM is the **Setup**.
- Setup will involve configuring various company level configurations, administrative setting and masters for each SoulCRM module.
- Click on the setup in the header to browse to the **Setup** module.

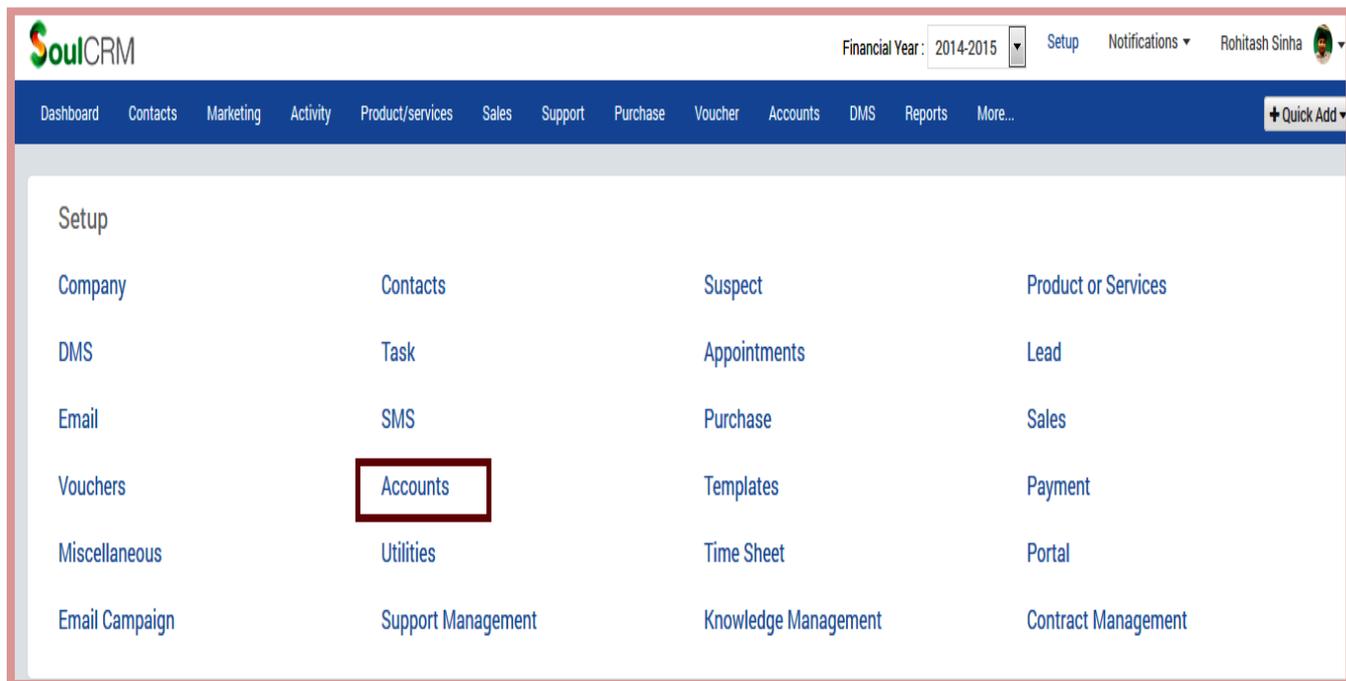
The screenshot shows the SoulCRM dashboard interface. At the top right, the 'Financial Year' is set to '2014-2015'. The 'Setup' menu item is highlighted with a blue box, and a red arrow points to it with the text 'CLICK HERE'. The dashboard includes a navigation bar with various modules like Dashboard, Contacts, Marketing, Activity, Product/services, Sales, Support, Purchase, Voucher, Accounts, DMS, Reports, and More... There are also two data tables: 'Support Request assigned to me' and 'Support Request created by me'.

ID#	Title	Date
265	Business Process understanding and Implementation	09-02-15
252	Data Import - Contact	05-02-15
249	Demo required for three new users at Finger Mate @ Punam Kanodia - going in phase wise manner would	05-02-15
198	Demo To A Suspect (ADITYA ECLATERPRISE)	02-01-15
253	Issues at Shreeji Tyres	
288	Re: Welcome to SoulCRM - Sesame	

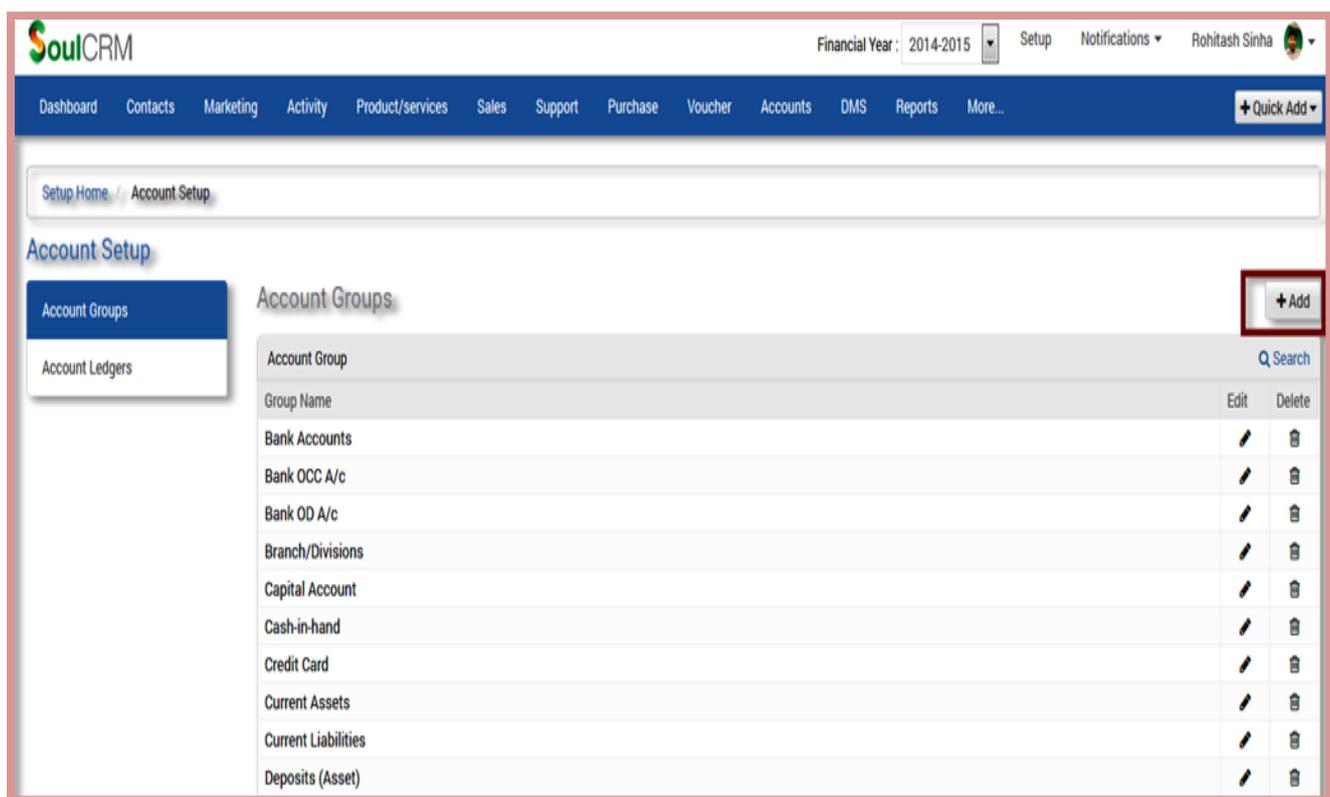
Order ID.	Title	Date
284	Suspect > Add > M/S - Designation disabled > it should be hidden as in case of VENDOR selection	17-02-15
283	various issues in testing templates - attached screen shot herewith	17-02-15
282	Design Break in Support Request while creating through mail	17-02-15
277	In Lead when user changes Outcome to WON, the STATUS also becomes WON - It does not convert to cont	13-02-15
276	Login Screen gives message after session expiry with a gramatical mistake	13-02-15
273	Requirement of Title Variable in Sales	13-02-15
272	Terms and Conditions in Quotation has different formats - where as Delivery Terms and Payment Terms	13-02-15
265	Business Process understanding and Implementation	09-02-15

► Accounts Groups and Ledgers

- Under **Setup**, the first step is to define **Accounts Group** (Default Groups given, in case more have to be defined can be done here)



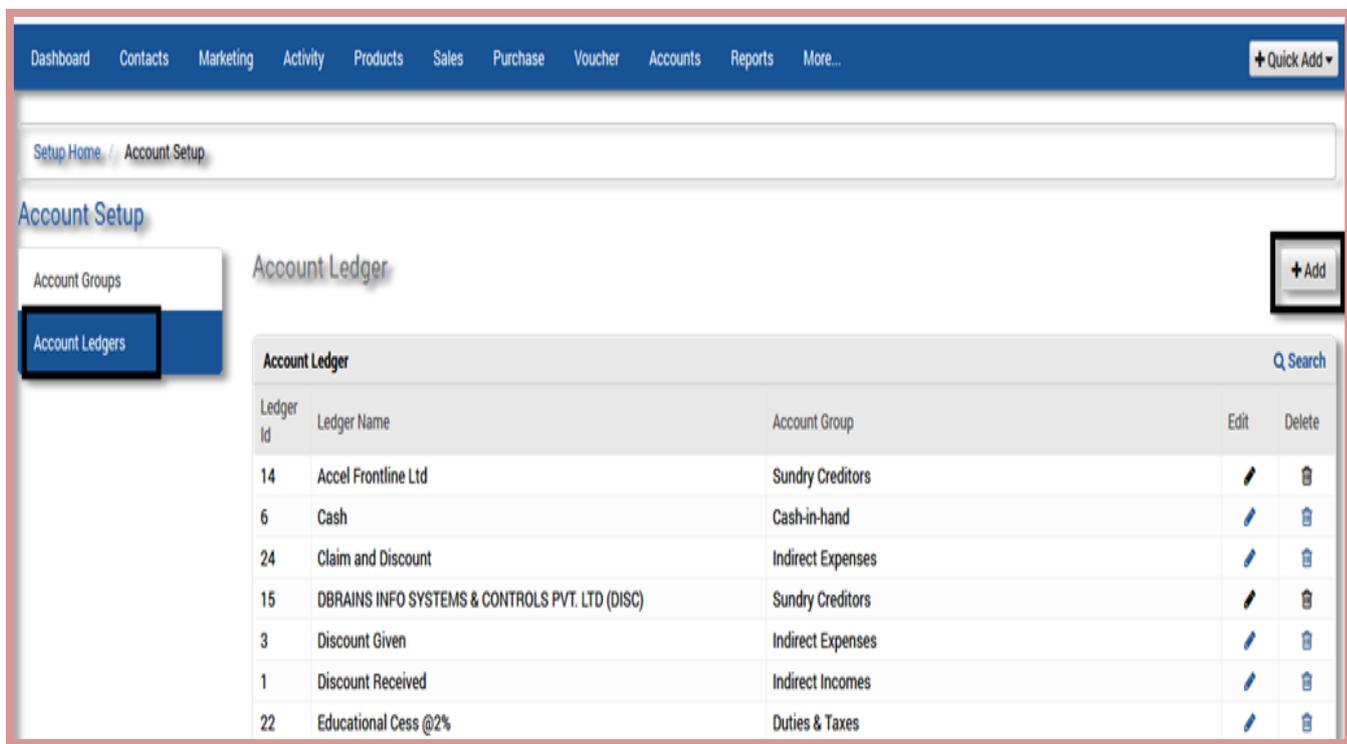
- Accounts group can be created from Setup > Accounts > Accounts Group > + Add



- Next define **Account Ledgers**

Account Ledgers can be defined under the Accounts Setup Link in the Setup Menu.

These account ledgers and their Accounts Group mapping should be the same as that in your accounting software (Tally).



The screenshot displays the 'Account Setup' page in SoulCRM. The navigation bar at the top includes 'Dashboard', 'Contacts', 'Marketing', 'Activity', 'Products', 'Sales', 'Purchase', 'Voucher', 'Accounts', 'Reports', and 'More...'. The breadcrumb trail shows 'Setup Home / Account Setup'. On the left, a sidebar menu has 'Account Ledgers' selected. The main content area is titled 'Account Ledger' and features a table with the following data:

Ledger Id	Ledger Name	Account Group	Edit	Delete
14	Accel Frontline Ltd	Sundry Creditors		
6	Cash	Cash-in-hand		
24	Claim and Discount	Indirect Expenses		
15	DBRAINS INFO SYSTEMS & CONTROLS PVT. LTD (DISC)	Sundry Creditors		
3	Discount Given	Indirect Expenses		
1	Discount Received	Indirect Incomes		
22	Educational Cess @2%	Duties & Taxes		

Note: Accounts Group and Ledger needs to be configured only if Accounting Module / Tally Integration are being opted for.

► Company Setup

- Next step is to configure **Company Master**, from Setup > Company
- Configure various details related to the company (address, communication, statutory, account settings)
- Upload your company logo and map the Default Sales and Purchase Account Ledger in the Company Master

Edit Company

Save Cancel * Fields are required

*Company Name: SoulCRM Group Company:

Tally Company Name: SoulCRM Tally URL:

*Code: RSPL Corporation Identity Number:

Address Details

*Address 1: 201, Parishram Elegant Address 2: Behind HCG Cancer Hospital

Area: Sola *City: Ahmedabad

State: Gujarat Country: India

Zip / Pin Code: 380062

Communication Details

Office Phone 1: 65451191 Office Phone 2:

Email: hello@rapidops.com Website: http://www.rapidops.com

- Define **branches** (branch name, code, applicable statute) if applicable. By Default Main Branch exists in the system.
- Define **departments**. Add the departments applicable in your company.

SoulCRM Financial Year: 2014-2015 Setup Notifications Rohitash Sinha

Dashboard Contacts Marketing Activity Product/services Sales Support Purchase Voucher Accounts DMS Reports More... Quick Add

Setup Home / Company Setup

Company Setup

Company Master

- Currencies
- Branches**
- Department**
- Roles
- Employee
- Bank Accounts
- Credit Card Accounts

Companies + Add

SoulCRM
201, Parishram Elegant,
Behind HCG Cancer Hospital,
Sola,
Ahmedabad-380062.
Gujarat.
Email:hello@rapidops.com
Website: http://www.rapidops.com
Type of Company:Group Company
Company ID:1

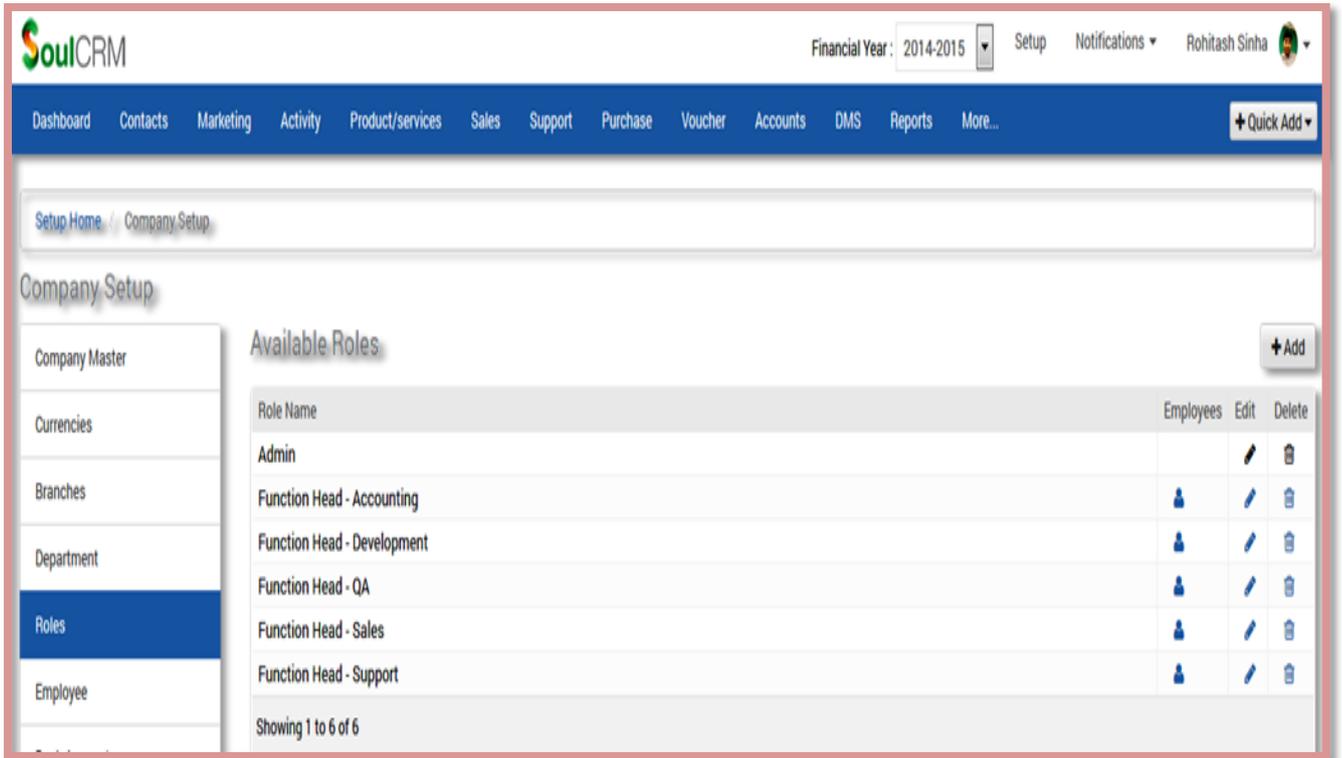
Change Logo

Edit Company

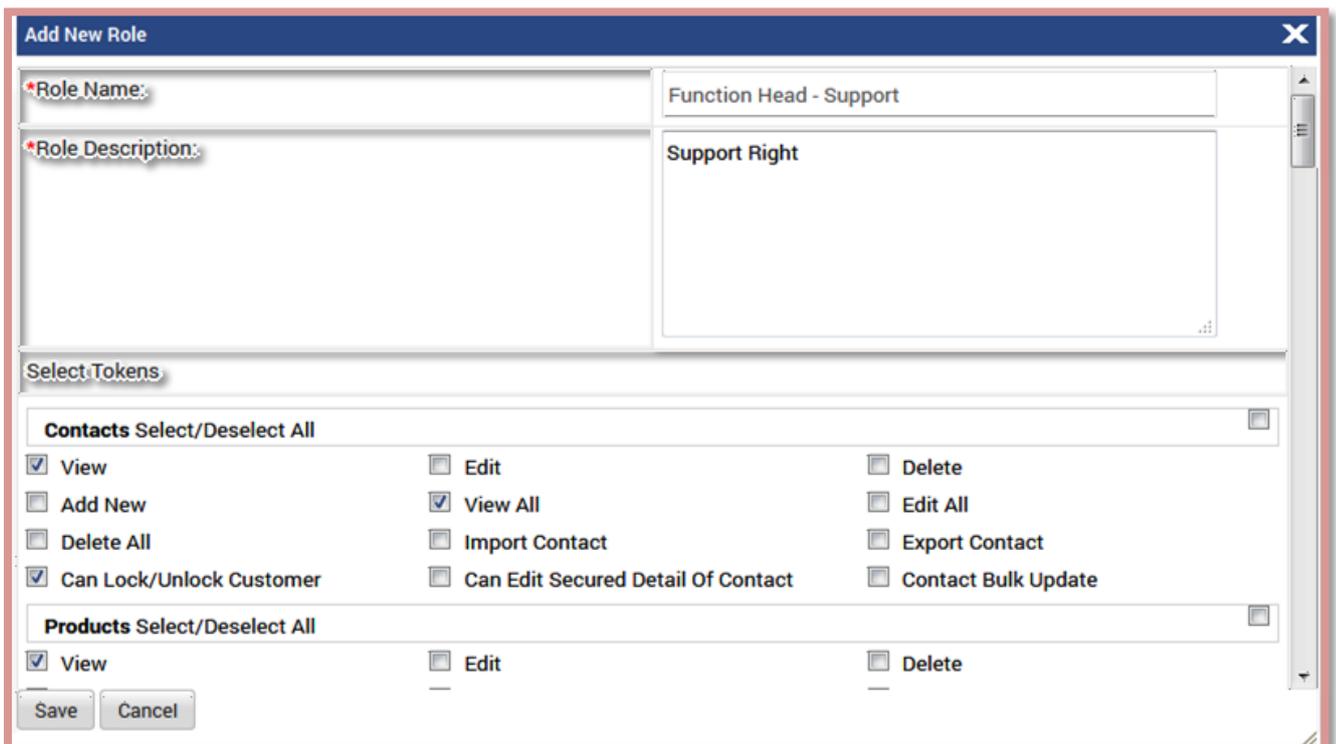
Showing 1 to 1 of 1

› Define Roles

- Roles help you define the rights assigned to the user for various modules of SoulCRM.

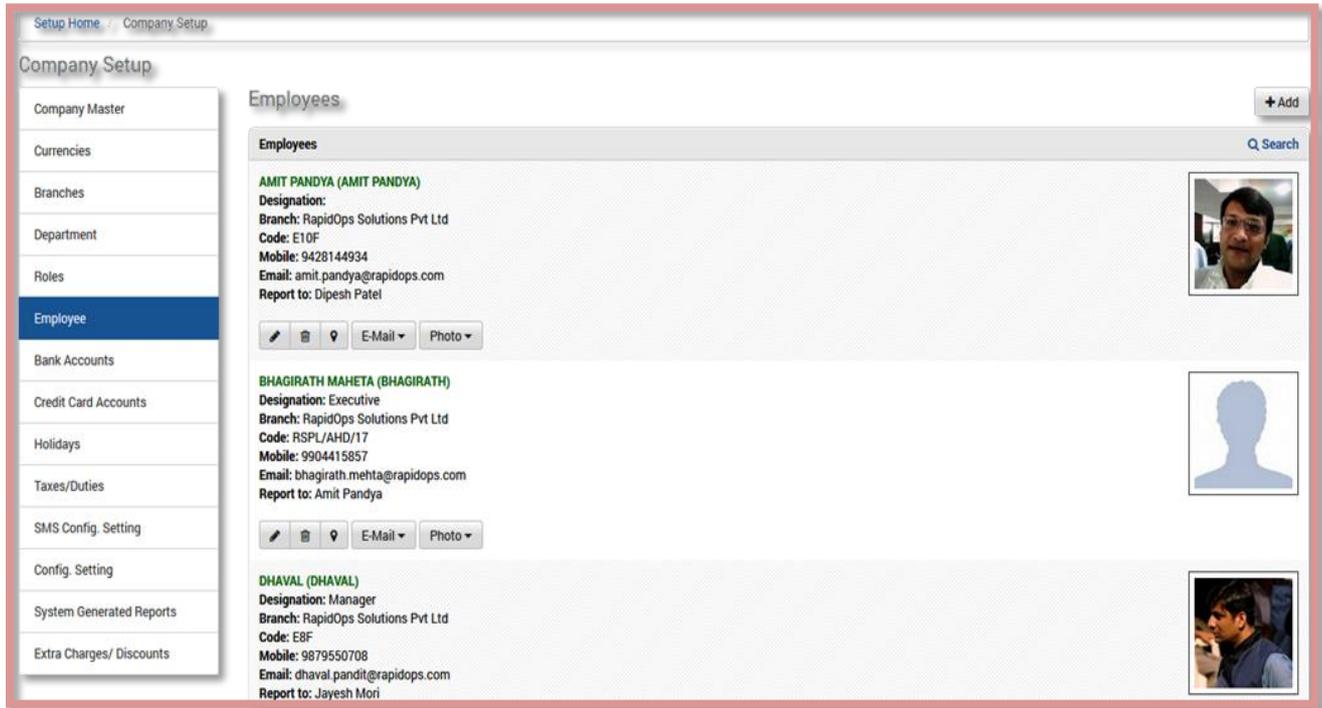


- Multiple roles can be defined and assigned to a user. In case of multiple roles all tokens covered under various roles will be applicable to the user.
- Commonly available tokens are Add, Edit, and Delete. Other tokens are View, Edit All, Delete All, View All, Bulk Update, Import and module specific tokens.



› Define Employees

Employees in your organization can be added to SoulCRM from Setup > Company Setup



- Maximum of employee you can add in SoulCRM link equals user licenses you've purchased.
- The number of active employees will be counted towards your license.
- Default employee is Admin.
- This Employee can be edited, renamed and details updated in the system.
- This Employee has to be defined as the Administrator of SoulCRM usually a management employee who will have the complete rights of the system.
- Defining Employees involves defining his Reporting Authority, Branch, Report Access, Notification Report Access, Login Details, Communication Details, Bank Account Details and Email Signature.

» Define Holidays

Select the Week day for Week Off and define the Holiday Dates.

This is useful while providing access to employees. Employees will not get access on the defined holidays.

The screenshot shows the SoulCRM 'Company Setup' page. The sidebar menu on the left includes 'Company Master', 'Currencies', 'Branches', 'Department', 'Roles', 'Employee', 'Bank Accounts', 'Credit Card Accounts', 'Holidays', and 'Taxes/Duties'. The 'Bank Accounts' table is displayed with the following data:

Bank Name	Account No	Branch	Branch Code	MICR Code	IFSC Code	GL Code	Currency	Edit	Delete
ICICI BANK	20405006509	SHAHIBAUG			ICIC000294	ICICI Bank	Indian Rupees (Rs)		
AXIS BANK	914020023341649	SCIENCE CITY			AB123	Axis Bank	Indian Rupees (Rs)		
Kotak Mahindra Bank	5411213537	Naranpura		3804855011	KKBK0000838	Kotak Bank	Indian Rupees (Rs)		

Showing 1 to 3 of 3

» Define Taxes / Duties

- Various taxes and duties can be defined based on applicability in your company.
- Taxes / Duties based on Grand Total, A particular tax, Grand Total including above taxes can be defined.
- This will help us define various types of taxes and their working viz. VAT, CST, Service Tax, etc.

The screenshot shows the SoulCRM 'Company Setup' page with the 'Taxes / Duties' table. The sidebar menu on the left includes 'Company Master', 'Currencies', 'Branches', 'Department', 'Roles', 'Employee', 'Bank Accounts', 'Credit Card Accounts', 'Holidays', and 'Taxes/Duties'. The 'Taxes / Duties' table is displayed with the following data:

Tax Id	TAX Name	TAX ON	Sales Account Ledger	Purchase Account Ledger	Rate	Edit	Delete
2	Add. VAT 1%	Grand Total	Additional VAT 1% (Output)	Additional VAT 1% (Input)	1(%)		
3	VAT 12.5%	Grand Total	VAT @ 12.5% (Output)	VAT @ 12.5% (Input)	12.5(%)		
1	VAT 4%	Grand Total	VAT @ 4% (Output)	VAT @ 4% (Input)	4(%)		
4	Add. VAT 2.5%	Grand Total	Additional VAT 2.5% (Output)	Additional VAT 2.5% (Input)	2.5(%)		
5	Service Tax @ 10.6%	Grand Total	Service Tax @ 10.6%	VAT @ 4% (Input)	10.6(%)		
6	Edu. Cess 2%	On Particular Tax	Edu. Cess 2%	VAT @ 4% (Input)	2(%)		
7	Sec. Edu. Cess 1%	On Particular Tax	Sec. Edu. Cess 1%	VAT @ 4% (Input)	1(%)		
18	Excise duty	Grand Total	Excise Duty	Excise Duty	10.36(%)		

Showing 1 to 8 of 8

Update Tax
✕

Save
Cancel
* Fields are required

* Taxes / Duties On :

* Taxes / Duties Name :

* Alias Name :

* Taxes / Duties Percentage :

* Sales Account Ledger :

* Purchase Account Ledger :

Save
Cancel

► Define Extra Charges / Discounts

- Various discounts and charges used in your company can be added here which can be further used in various documents like quotation, invoice, etc.
- These Charges and Discounts can be either Fixed or based on a Percentage Value

Financial Year: 2014-2015
Setup
Notifications
Rohitash

Dashboard
Contacts
Marketing
Activity
Products
Sales
Support
Purchase
Voucher
Accounts
DMS
Reports
More...
Quick Add

Setup Home / Company Setup

Company Master

Currencies

Branches

Department

Roles

Employee

Bank Accounts

Extra Charges/Discounts

✎ Add

Tax Id	Charges/Discounts Name	Charge Type	Rate	Edit	Delete
9	Depot Charges	Fixed	-0.01	✎	✖
10	Insurance Charges	Fixed	0.00	✎	✖
11	RTO Charges	Fixed	0.00	✎	✖
13	Stamp Duty	Fixed	0.00	✎	✖
14	CarBerry Discount	Fixed	-200.00	✎	✖
15	Exchange/Loyalty	Fixed	0.00	✎	✖
16	Corporate Discount	Fixed	0.00	✎	✖
17	Used Car Value	Fixed	0.00	✎	✖

Note: All discounts need to be appended by a (-) when using in various Sales, Purchase documents.

► SMS Configuration Settings

When user opted for SMS services has to configure **SMS** settings under **setup** and then map the service provider **SMS gateway** in the company setup under **SMS configuration** settings.

It has to be noted that the recommended service provider for SoulCRM is **SMS Gupshup (<http://gupshup.me>)

› System Generated Reports

- Users to whom the various intimations are to be sent can be selected here.
- These intimations are generated on New Contact, Task, Lead Created; New Marketing / Sales / Purchase Document Created; Completion / Closure of an item or Replies on an item, etc.
- Once we have configured the basic setup or next essential step is adding **Products**.

The screenshot shows the 'Company Setup' page in SoulCRM. On the left is a sidebar menu with options like 'Company Master', 'Currencies', 'Branches', etc., with 'System Generated Reports' selected. The main area is titled 'System Generated Reports' and contains a table of report types, each with a user selection icon (a person icon).

Report Name	User Selection
New Contact Created	[User Icon]
New Task Created	[User Icon]
New Lead Created	[User Icon]
New Quotation Created	[User Icon]
New Sales Order Created	[User Icon]
New Invoice Created	[User Icon]
New Payment Receipt Created	[User Icon]
New Support Request Created	[User Icon]
Task Completed	[User Icon]
Lead Closed	[User Icon]
Support Request Closed	[User Icon]
Replies In Task (Team)	[User Icon]
Replies In Task (Individual)	[User Icon]
Replies In Lead (Team)	[User Icon]
Replies In Lead (Individual)	[User Icon]
Support Request Replies (Team)	[User Icon]
Support Request Replies (Individual)	[User Icon]

The screenshot shows an 'Employees' dialog box. At the top, there are 'Save' and 'Cancel' buttons. Below, it displays 'Employees Report Name :- New Contact Created' and a 'Select/Deselect All' checkbox. A list of employees follows, each with a checkbox:

- Jaimin Shelat (jaimin)
- Kamlesh (admin)
- Raj Mori (raj)
- Rohitash (rohitash)
- Samir Patel (samirpatel)
- shailee parikh (shailee)

► Configuration Settings

Various settings listed under can be configured using the configured using the configuration settings link.

- Employee Code Creation Method
- Defining Financial Year beginning.
- Defining Financial Year Start from Month
- Books Beginning From Date
- Time Offset
- Date Format
- Time Format
- Precision
- Multi Currency
- Default Currency
- Tally Access Key
- Disclaimer

Setup Home / Company Setup

Company Setup

- Company Master
- Currencies
- Branches
- Department
- Roles
- Employee
- Bank Accounts
- Credit Card Accounts
- Holidays
- Taxes/Duties
- SMS Config. Setting
- Config. Setting
- System Generated Reports
- Extra Charges/ Discounts

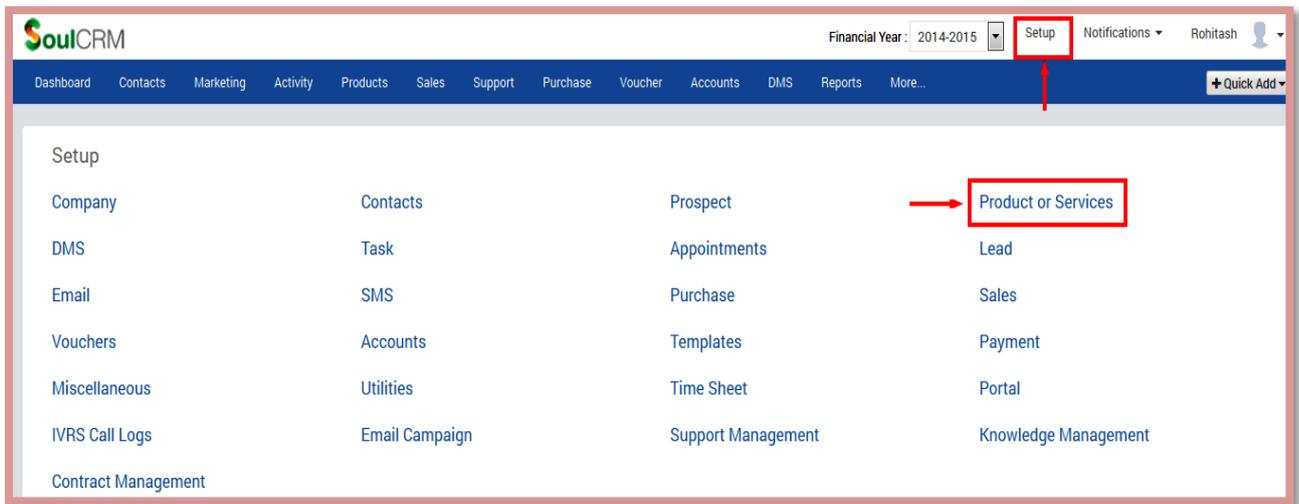
Config Settings

Any changes in configuration settings requires renewal of your session. Please re-login after changes done.

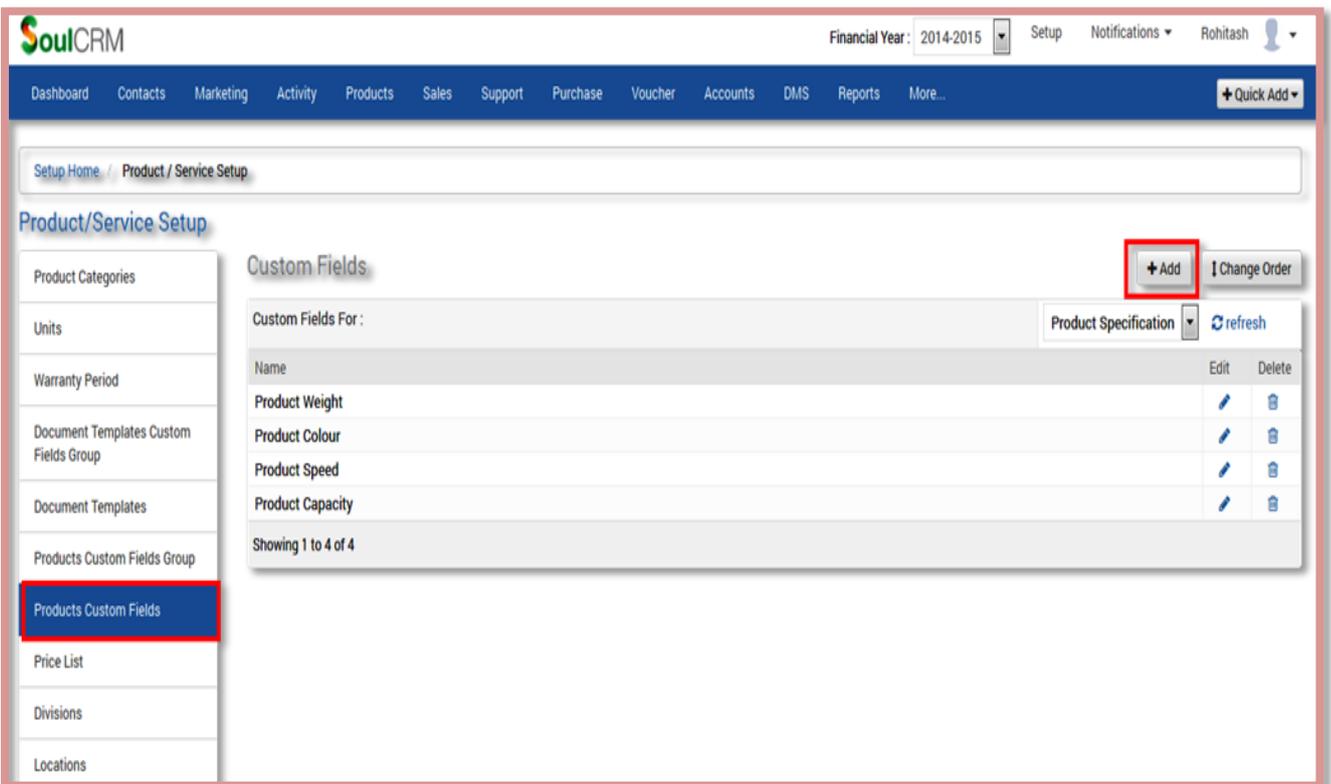
Select Employee Code Creation Method: <small>Select the mechanism for giving codes to your employees. You can keep it manual if you have very much tricky or calculation based codes. Or you can keep it automatic if codes are assigned in serialized way or you don't have problem with serial code assigning mechanism.</small>	AUTOMATIC ▾
Specify Employee Code Prefix: <small>if you have selected auto code generation mechanism for your employees then your written characters will be appended as prefix to code.</small>	E
Specify Employee Code Suffix: <small>if you have selected auto code generation mechanism for your employees then your written characters will be appended as postfix to code.</small>	F
Please Select Your Financial Year:	2014-2015 ▾
Please Select Your Financial Year Starts From:	April ▾
Books Beginning From:	01-04-14
Default Time Offset: <small>Select time zone in which your company operate. Employees can change their timezone if your employees work from different timezone.</small>	(GMT +5:30) Bombay, Calcutta ▾
Default Date Format: <small>Select preferred date format of your company. Employees can overwrite company's default dateformat preference from their account.</small>	d-m-y (17-03-15) ▾
Default Time Format: <small>Select preferred time format of your company. Employees can overwrite company's default time format preference from their account. H:i is 24 hour time format, h:i a is 12 hour date format.</small>	h:i a (04:18 pm) ▾
Default Precision: <small>Select precision which is followed in your company. Suggested precision level is 2 or 3. If you select precision level 2 and in software there is some value like 7.5787 then it will be shown as 7.58.</small>	2
Multi Currency: <small>Select if you want to enable multi-currency option for your company or not.</small>	NO ▾
Default Currency: <small>Select based currency for your company.</small>	Indian Rupees (Rs) (INR) ▾

Product or Services Setup

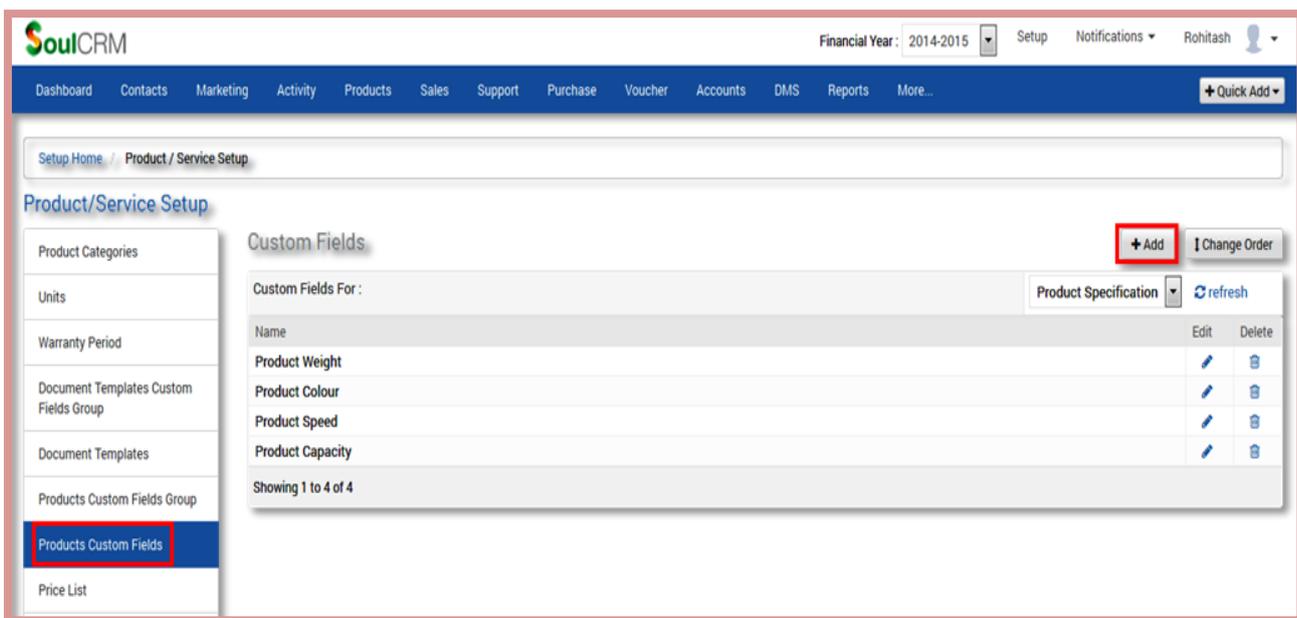
Next Configure Products or Services via **Product or Services Setup**



Involves defining Product or Service **categories, units, warranty period**, related **templates**, custom **fields** and their **groups, price list, division, locations**, repair **stock** and basic **configuration** to identify the product by well known name applicable for the specific industry SoulCRM is being implemented for. Example: Cars in case of a Company dealing in Sales / Purchase of Cars.



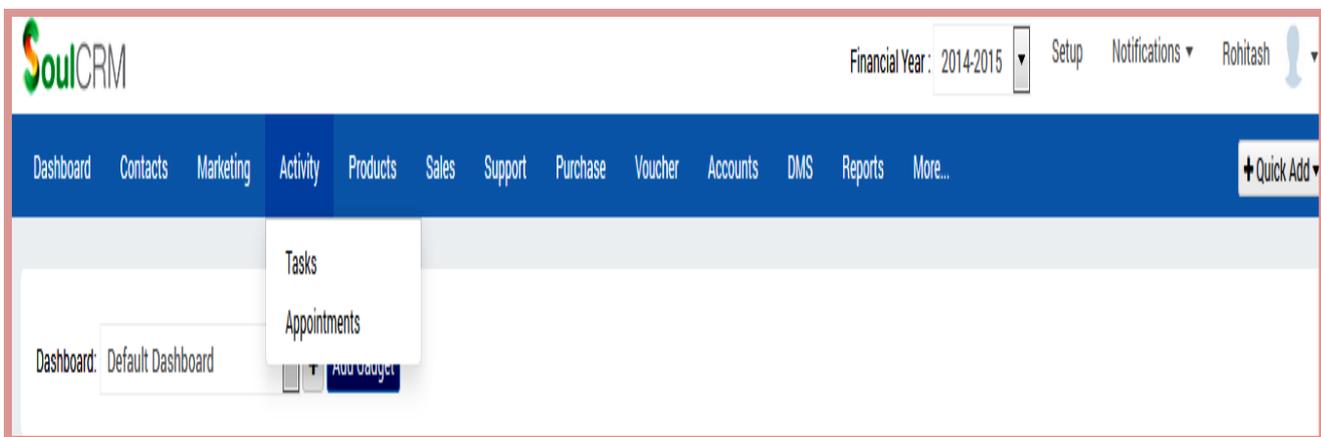
To add a product, click + Add Products and enter the requisite details.



- Via Actions button Bulk updates viz. pricing, taxes can be updated. Via Import, Locations and pricelists can also be imported using a pre defined Excel template available in SoulCRM.
- **Product Stock can be managed via Stock Journal and Stock Transfer Entries.**
- Also Stock Inward can be handled via various Purchase Documents viz. Material Inward, Purchase Invoice.

► Activities

- Activities are basically your day to day work processes which you can capture using the Activities Module.
- It helps you in recording the processes and go through them to refine your processes and achieve a better output in terms of better Client Relationships (Timely follow ups, reminders, etc.)



- The Activities module is divided into two parts
 - 1) Tasks

2) Appointments

► Task

To **Create a Task**, Click on Activity > Task > Compose

The task will be assigned to the Employee and a notification available to him the Notification Area. This task will appear in the My Open and Pending Tasks for the user it is assigned to.

- Tasks are your process further classified into 1) Categories (Activity) and 2) Sub Categories (Sub Activity) with respective priorities, Status and Followers.
- You can manage templates for a task and also attach files to the task.
- A Task can be assigned to a user and further follow-ups added via replies to the task.
- Various Quick views to see the tasks are available viz. My Current Tasks, My Open Tasks, My Overdue Tasks, etc.
- Also Task can be search based on various fields in the task from the Search options given on the screen left hand side

The screenshot shows the 'Compose Task' interface. At the top left are 'Save' and 'Cancel' buttons. The 'Subject' field is marked as required. Below it is a 'template lookup' link. The 'Due Date' field includes a calendar icon. The 'Contact / Prospect' field is for selecting a contact. The 'Description' field has rich text editing tools. The 'Assign to' field is for selecting an assignee. The 'Priority' dropdown is set to 'Low'. The 'Activity' dropdown is set to 'Select activity'. The 'Send notification to followers' section has 'Email' checked and 'SMS' unchecked. The 'Followers' field contains 'ROHITASH'. The 'Related to' dropdown is set to 'Select', with a 'Search' link below it. The 'Status' dropdown is set to 'In Progress'. The 'Sub activity' dropdown is set to 'Select sub activity'.

► Appointments

- Appointments are events happening during a particular time, be it for few hours to days or months. These appointments can be hourly, daily, weekly, monthly, etc.
- In SoulCRM you can add appointments and manage them via Calendar.
- Each task will have a start date an end date and can be further categorized into various type and subtype and various employees can be included in the appointment.

The screenshot shows a 'Create Appointment' dialog box with the following fields and options:

- Is it "All Day Event" ?**:
- *Start Date:** [Text Input] **Start Time:** (GMT +5:30) Bombay, Calcutta [Dropdown]
- *End Date:** [Text Input] **End Time:** [Text Input]
- *Title:** [Text Input]
- Description:** [Text Area]
- Location:** [Text Input]
- Contact:** [Text Input] (you can add multiple contacts who are part of appointment)
- Employee:** [Text Input] (you can add multiple employees who will accompany)
Rohitash [User Avatar]
- send email notification to all attendee?**

An appointment can be created using the Add Appointment button under Appointments tab in Activity Menu.

Also search option is available to search the task based on its priority, duration, contact, employee involved, importance and type.

The screenshot shows the SoulCRM interface with the 'Appointments' module selected. The table lists the following appointments:

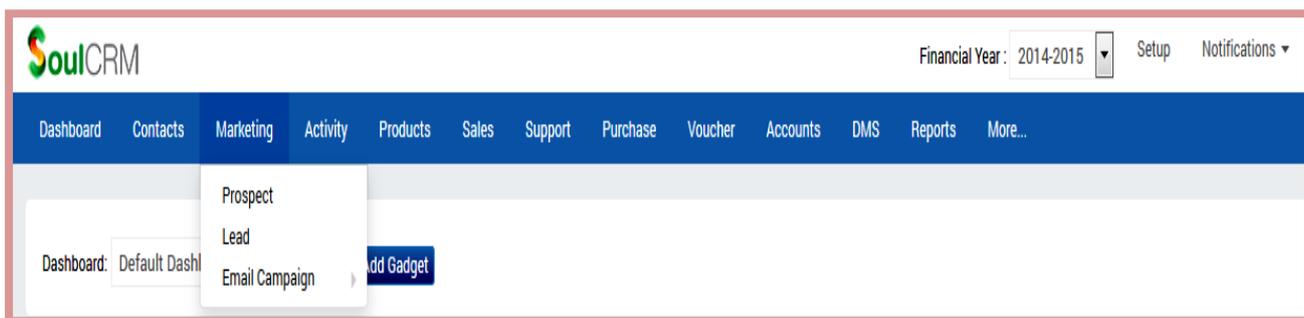
Title	Importance	Start Time	End Time	Created By	Created On	Edit	Delete
test for call result	High	18-12-14 06:55 pm	18-12-14 06:56 pm	Kamlesh	18-12-14		
Module Understanding	High	22-12-14 12:00 am	29-12-14 12:00 am	Kamlesh	20-12-14		
Meeting Regarding the Business Marketing		26-12-14 12:00 am	29-12-14 12:00 am	Shalini Chauhan	25-12-14		
Go For Blood Test	High	09-01-15 07:05 pm	09-01-15 08:05 pm		02-01-15		

Showing 1 to 4 of 4

► Marketing Flow

Marketing involves

- Raw Contact and
- Lead Management
- Email Campaign



- Raw Contact / Suspect / Prospect is your raw data with basic information available on it to be further called upon and determined if the Raw Contact is a Qualified Lead or not.
- This raw contact will be further converted to a lead and further into a contact upon the Lead being won.
- Raw Contact as it is referred involves basic Configuration Settings to be configured from Setup Home > Prospect Setup
- It helps us define the Label for Raw Contact and marking the compulsory fields and managing unique records for Raw Contact for Individual and Company.
- Thereafter a Raw Contact can be added from Marketing Menu > Raw Contact
- Click + New Raw Contact to add a New Raw Contact, add basic details viz. Name, Mobile Number and Email Address whatever available and save the Raw Contact
- Once the Raw Contact is saved click on the + button on the Contact name row and Click **Add Lead**

The screenshot shows the 'Edit Prospect' form with the following details:

- Prospect Name: CA. GUPTA VINOD KUMAR
- Mobile Number: 9810058860
- E-Mail: gupta@gmail.com
- Privacy: Public Private
- Type of Contact: Customer Vendor Both Other

► Lead

- The details viz. Raw Contact Name and Contact Details are pre filled in the Lead.
- Select the Associated Contact (if any), Source of Inquiry, Lead Status, Assign to, Associate the relevant products (if details available), Add followers (if any), Select Lead Priority, Select Lead template and load relevant data for the lead.

Create New Lead

Save Save & Create Task Cancel * Fields are required

Basic | Lead More Information | Lead Product More Information

Title: Warm Lead through Email Campaign

* Name: NAME + send email

Mobile: BCP - Customer Campaign Name 9891075517 Customer (C) 999999990 Office Phone: bcpc@bcpc.com 23233346,9891075517

Home Phone: Email:

Associated Contacts : Select Contact Person + Address: Residencial +

Source of Inquiry: Email Campaign Lead Status: Pending Closure - Revised Quc

Created By: Rohitash (E7F) Estimated Order Amount: 5000000

Assign To: shailee parikh (E8F) Assign To Date: 17-03-15 10:45 pm

Products : +

Delete Maruti Suzuki Alto 800 Lx Frost Blue

Followers: ROHITASH SHAILEE PARIKH (E8F)

Select Lead Template: Lead Script Lead Priorities: Medium(Warm)

- In the Lead More Information Tab add relevant data as defined using Custom fields for leads.

- Another Tab viz. Lead Product More Information will appear if Product Custom fields exist and are enabled for the Lead while creating the Product.
- This lead can be further followed up by replies and maintaining the outcome i.e. at which stage the lead is with reminders for follow-ups.
- Also forecast can be set for the expected business from the lead.
- Once a conclusion viz. the lead is Won / Lost is arrived to the Won / Lost button can be clicked in directly.
- Once Won the Lead Status will be updated to Won and you will be prompted to create a Sales Order (SO).
- Upon approving the SO the Lead will be converted to a Contact.
- In case the Lead is lost you will be prompted to add the reason and specify the competitor if any to whom the lead has been lost.
- Also a lead can be revoked and assigned to another user using the Revoke button with for revoking and assigning the Lead.
- During the Lead a Quotation can be created from the Actions Menu which will automatically get attached to the Lead.
- All process done on the Quote will be taken as a reply in the lead. Once confirmed and converting the Quote to SO it will be added to the lead too. Also a contact for the lead will be created.

► Contacts

Contact is the heart of a CRM. It includes all the information about a contact. The contact can be categorized into a Customer/ Vendor or both i.e. one from whom you serve and the one whose services you take or it could be both wherein you give and take services from a single contact.

The screenshot shows the SoulCRM web application interface. At the top, there is a navigation bar with the following menu items: Dashboard, Contacts, Marketing, Activity, Product/services, Sales, Support, Purchase, Voucher, Accounts, DMS, Reports, and More... The user's name, Rohitash Sinha, is visible in the top right corner. Below the navigation bar, the 'Contacts' section is active, displaying a table of contact records. The table has columns for Code, Contact Name, Mobile, Office Phone, Home Phone, E-Mail, and Acc. Manager. The following table represents the data shown in the screenshot:

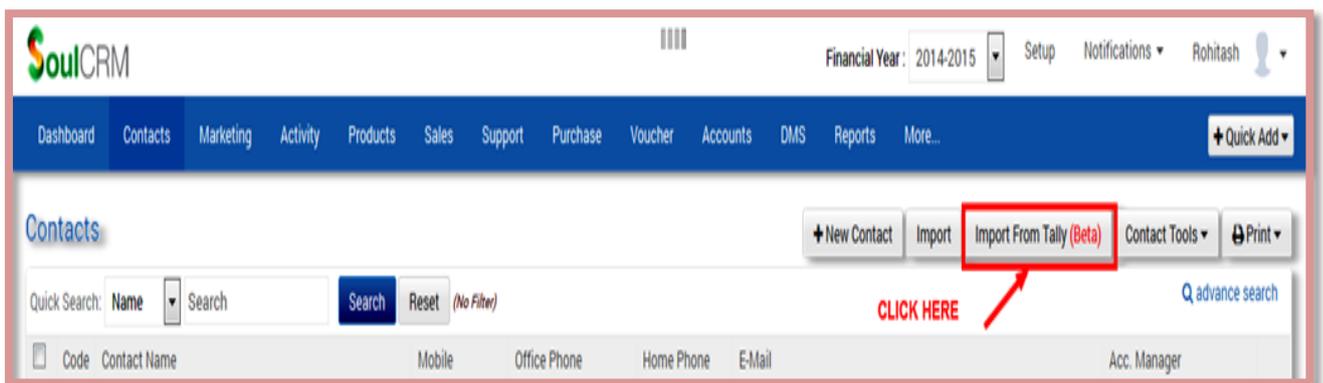
Code	Contact Name	Mobile	Office Phone	Home Phone	E-Mail	Acc. Manager
48	Aditya	09029499339	022-6888663	022-28543019	sales@eclatenterprise.com	Dhaval Pandit
69	Akik Shah	9925006645			akikshah@fitinternational.com	Dhaval Pandit
61	Alok Rai	09711183960	124-4119090		aarenc@live.com	Dhaval Pandit
21	Amit Mital	09810095400	011-46528831		amit.mital@frama.in	Dhaval Pandit
78	Amsan Technology	09900601788	08061344330		santosh@amsantechnology.com	Dhaval Pandit
31	Ankur	9887508167			g.ankur11@gmail.com	Dhaval Pandit
51	Apal Vora	9824111355	079-25500100	079-25500200	apalvora4u@gmail.com	Dhaval Pandit
45	Arunkumar M					Dhaval Pandit

Contacts can be created using the **+Add New** contact button.

Alternate way of creating a contact is to import it via a pre-defined spreadsheet format available in the import.

Also various task related to Contacts can be done via the Contact Tools viz. Exporting the contact, bulk updating contact values, sending SMS.

Also a contact can be searched using the Quick search based on Name, Code, Mobile no or Email ID. Also an advanced search option is available to search the contact based on the various fields of the contact.



Contacts can also be imported via Import from Tally

Connections viz. Tally Company Name & URL need to be updated to the Company Setup

- Ideal way of entering a contact
 - Click add Contact
 - Select Title of type individual viz. Mr., Miss, Mrs., etc
 - Uncheck Create Ledger
 - Enter details of the individual viz. Mobile no, E-mail, etc
 - Enter Company Name > If exists select the Company
 - If Company does not exist, Click Add New Company
 - Enter details of Company & Click Save.

▶ Email Campaign

Email Campaign module allows you sending emails to your customers all at a go. i.e. it's a bulk email tool using which you can send emails to a predefined list in the system and track the emails sent.

An analysis of the email campaign fired can be viewed and the campaigns refined and redone to have an effective reach of to the prospective customer.

To start configuring your first Email Campaign click here.

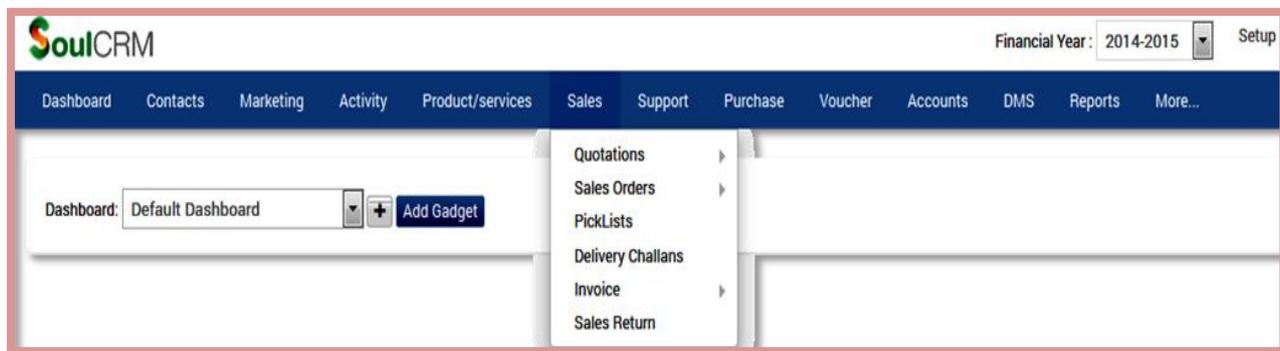
The screenshot displays the SoulCRM web application interface. At the top, the 'SoulCRM' logo is on the left, and 'Financial Year: 2014-2015', 'Setup', 'Notifications', and 'Rohitash Sinha' are on the right. A navigation bar contains various modules: Dashboard, Contacts, Marketing, Activity, Product/services, Sales, Support, Purchase, Voucher, Accounts, DMS, Reports, and More... The 'Marketing' module is active, and a sub-menu is open showing 'Suspect', 'Lead', and 'Email Campaign' (which is highlighted with an orange box). Below the navigation, there are three buttons: '+ Create Campaign', '\$ View Credits', and 'View Recipient List'. The main content area features a table with the following columns: Campaign Name, Email Subject, Total Sent, Last Update Date, Campaign Status, View, Edit, and Delete. The table lists several campaigns, all with a status of 'Sent'.

Campaign Name	Email Subject	Total Sent	Last Update Date	Campaign Status	View	Edit	Delete
SoulCRM Release Notes of version 0.2.5	SoulCRM Release Notes of version 0.2.5	152	16-03-15	Sent			
SoulCRM Down Time Update Notice - Release of version 0.2.5	SoulCRM Down Time Notice - Release of version 0.2.5 (UPDATE OF TIME IN IST)	152	12-03-15	Sent			
SoulCRM Down Time Notice - Release of version 0.2.5	SoulCRM Down Time Notice - Release of version 0.2.5	153	12-03-15	Sent			
Test 0.2.5	SoulCRM Down Time Notice - Release of version 0.2.5	1	12-03-15	Sent			
Release of version 0.2.4 of SoulCRM	Release of version 0.2.4 of SoulCRM	136	18-02-15	Sent			
Release 17 test	Release of version 0.2.4 of SoulCRM	1	17-02-15	Sent			
SoulCRM Planned Server Down Time Notice - 17/02/15	SoulCRM Planned Server Down Time Notice @ 17/02/15 - 6:00 PM to 9:00 PM	135	16-02-15	Sent			
SoulCRM Planned Server Down Time Notice - 17/02/15 @ 6:00 PM to 9:00 PM	SoulCRM Planned Server Down Time Notice @ 17/02/15 - 6:00 PM to 9:00 PM	1	16-02-15	Sent			
SoulCRM New Website Launch 1	SoulCRM New Website Launch	31	06-02-15	Sent			
SoulCRM New Website Launch	SoulCRM new website launch	33	05-02-15	Sent			
Release Note - Jan 20 Release	SoulCRM Release Notes - Jan 20 Release v 0.2.2	25	03-02-15	Sent			

► Sales Flow

Sales involves creating Quotations, Sales Orders, Delivery Challan, Invoicing and Sales Returns.

The Sales flow can be defined as creating a Quotation, Approval from Customer to Convert it to Sales order, Arranging dispatches to customer via Delivery Challan and billing i.e. Creating Sales Invoices against the respective Sales Order.



- Each of these documents involves Selecting the Contact, Adding the Date, Applicable tax Group, References, Product Details, Statutory Details, Shipping, Terms & Conditions, Cover Pages and Annexure.
- These documents cover up the details of the document being created and each detail viz. T&Cs, Cover Pages, Tax groups can be automated by defining appropriate templates in respective Setup's.
- Pricing, revision in documents, approval flows if any for the document can be followed.
- In case of Sales Return creating a Sales Return and issuing a Credit Note to the customer.
- Creating a Payment schedule and collecting Payment against the invoices.
- Each of the documents can be either printed or an e-mail sent to the customer.
- The format for the same can be predefined and customized as per customer requirement using templates.
- To create a **Quotation**, Click Sales > Quotations, Click Create Quotation
- Similarly, **Sales Order** and **Invoice** can be created
- To create a **Delivery Challan (DC)**, Click Sales > Delivery Challan, Click Create Delivery Challan
- To create a **Sales Return**, Click Sales > Sales Returns, Click Create Sales Return
- All the sales documents can be searched from their respective menus using the search option.

The screenshot shows the 'Quotation' form and a list of quotations. The form includes fields for Company, Branch, Date From, To, Contact, Prospect, Quotation No., Quotation Title, Employee, Products, Reference, Sent, and Tax Group. Below the form is a table of quotations.

Quotation No.	Date	Contact/Prospect	Net	Status
Q-BDB-MB-1415-351-1	16-03-15	Mechatronix	300,000.00	Approved
Q-BDB-MB-1415-298-1	22-01-15	shailee	621,824.70	Approved
Q-BDB-1415-270-1	26-12-14	sandeep	100.00	Approved
Q-BDB-MB-1415-266-1	22-12-14	Kamlesh Goplani	-111.00	Approved
Q-BDB-1415-255-1	11-12-14	Chirag	300,000.00	Approved

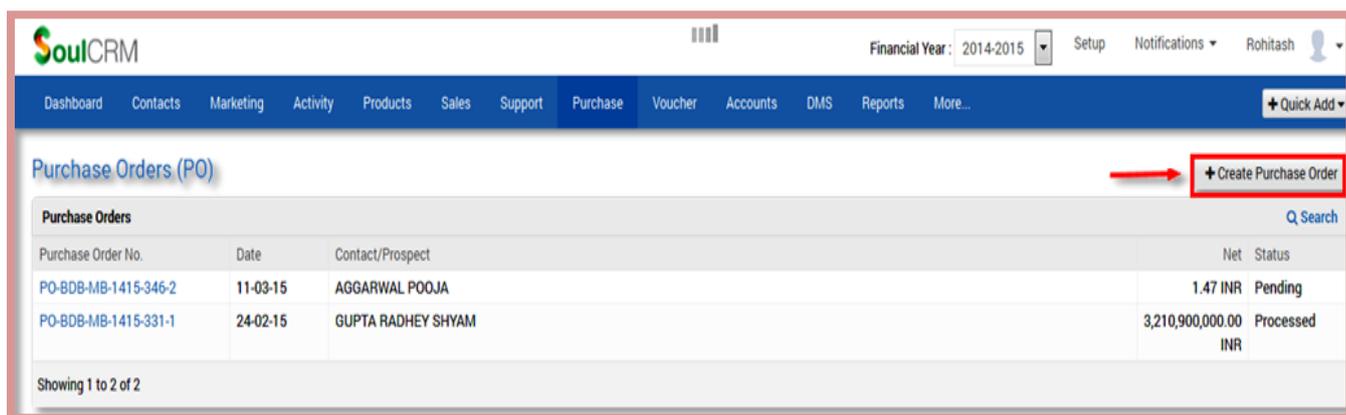
► Purchase Flow

Purchase involves creating

- Purchase Orders (PO)
- Material Inward
- Invoicing
- Purchase Returns

The screenshot shows the 'Purchase' menu in the SoulCRM interface. The menu is open, showing options: Purchase Order, Material Inward, Purchase Invoice, and Purchase Return. A sub-menu for 'Purchase Order' is also visible, containing 'Request for Approval' and 'Request for Cancellation'. The interface includes a navigation bar with various modules and a dashboard configuration area.

- The Purchase flow can be defined as creating a PO, putting it in an approval flow if required and getting the material and entering it into the system via Material Inward i.e. generating a Goods Receipt Note (GRN)
- Thereafter creating a Purchase Invoice against the PO or GRN and doing a Payment against it or creating a debit note or any adjustments or Crating a purchase Return against and invoice.
- Each of these documents involves Selecting the Contact, Adding the Date, Applicable tax Group, References, Product Details, Statutory Details, Payment Terms & Conditions, Cover Pages and Annexure.
- These documents cover up the details of the document being created and each detail viz. T&Cs, Cover Pages, Tax groups can be automated by defining appropriate templates in respective Setup's.
- Pricing, revision in documents, approval flows if any for the document can be followed.
- Each of the documents can be either printed or an e-mail sent to the customer.
- The format for the same can be predefined and customized as per customer requirement using templates.



➤ **To create a PO, Go to Purchase, Click Purchase Order,**

- Mark as approved to process PO
- Until the PO is approved it will be available for editing
- Click Process to Process the PO.
- The same can be either printed or sent via email in the selected format.

➤ **To Create Material Inward, Go to Purchase > Material Inward**

Note: Material inward can be taken for the quantity received. For pending quantities again a material inward can be taken.

Material Inward Home

Financial Year: 2014-2015 Setup Notifications Rohitash

Dashboard Contacts Marketing Activity Products Sales Support **Purchase** Voucher Accounts DMS Reports More... + Quick Add

Purchase Order
Material Inward
 Purchase Invoice
 Purchase Return

+ Create Material Inward + Create Material Inward For Opening Invoice

Material Inward Q Search

GRN No.	Inward Datetime	Supplier	Inward Done By	Docket No	Received Through	Document Date	Supplier Detail
GRN-BDB-MB-1415-333-1	26-02-15 12:00 am	AGGARWAL POOJA	Jaimin Shelat		Blue Dart Cargo Services		View
GRN-BDB-MB-1415-331-1	24-02-15 12:00 am	GUPTA RADHEY SHYAM	Jaimin Shelat	GJ H 0909	Blue Dart Cargo Services	24-02-15	View
GRN-BDB-MB-1415-318-1	11-02-15 01:00 pm	GUPTA RADHEY SHYAM	Jaimin Shelat		Blue Dart Cargo Services		View
GRN-BDB-MB-1415-296-1	20-01-15 12:00 am	AGGARWAL POOJA	Kamlesh	123	Speed Post		View

➤ **To Create Purchase Invoice,** Go to Purchase > Purchase Invoice, Click on Commercial Invoice

- Enter basic details, product details and terms
- Select the GRN (Goods Receipt Note) against which the goods have been received and the invoice is to be adjusted
- Multiple GRN can be selected to create a single invoice
- The Purchase Invoice can be further locked to avoid editing
- Until un locked it will be available to edit
- Click Process Purchase Invoice to process the Purchase Invoice
- Furthermore payments, adjustment or Debit notes can be created against the Purchase Invoice

Purchase Invoices (PI)

Financial Year: 2014-2015 Setup Notifications Rohitash

Dashboard Contacts Marketing Activity Products Sales Support **Purchase** Voucher Accounts DMS Reports More... + Quick Add

Commercial Invoice
 Opening Excise Invoice
 Excise Invoice
 Service With Unit Invoice
 Service Without Unit Invoice

Status: Active/Close

Vendor Invoice No	Vendor Invoice Date	Contact/Prospect	Purchase Invoice Type	Net	Adjusted Amount
767676	24-02-15	GUPTA RADHEY SHYAM	Commercial Invoice	4,502,400,000.00 INR	0.00
m	17-02-15	AGGARWAL POOJA	Commercial Invoice	45,000.00 INR	0.00 Pending for Approval
c	03-02-15	BANSAL RAJ KUMAR	Commercial Invoice	22,210.72 INR	0.00 Close
2	14-01-15	BANSAL RAJ KUMAR	Excise Invoice	1,000,000.00 INR	0.00 Close
1	23-12-14	Shalini Chauhan	Commercial Invoice	47,895.00 INR	18,900.00 Close
agn101	16-12-14	Shalini Chauhan	Commercial Invoice	1,260.00 INR	0.00 Close

Showing 1 to 6 of 6

› Vouchers

Apart from the regular Sales and Purchase another facility of creating vouchers for various expenses done in the organization can be taken care of through SoulCRM.

- Various Expense vouchers can be created in the system
- An approval flow for the vouchers exists prior to making a payment for the vouchers
- Vouchers can be approved in part or as a whole and payments done through various modes be captured viz. Cash, Bank, Credit Card, Online Transfer, etc.

Save Save & Create Task Cancel * Fields are required

Company: Demo Company

* Voucher Category: Direct Expense * Voucher Type: Cartidge & Frieght

Preferred Payment Mode: Cash

Voucher Date: 31-12-14

Period From: 01/Jan/2015 Period To: 08/Jan/2015

* Contact/Employee: Rohitash

* Beneficiary Ledger/Ass. Contact: Rohitash

* Amount: 10000

Maximum allowable amount : 35000

› Accounts

- The accounts section involves various Accounts related document handling viz. - to manage the account related transactions.

SoulCRM Financial Year: 2014-2015 Setup Notifications Rohitash

Dashboard Contacts Marketing Activity Products Sales Support Purchase Voucher Accounts DMS Reports More... + Quick Add

Journal Home + Create Journal

Journals Q Search

No journals found!

Journal
Receipts
Credit Note
Payments
Debit Note

- Journal entries
- Receipts
- Credit Note
- Payments
- Debit Notes

The respective groups and ledgers need to be defined properly to manage the accounts effectively and accurately which can be managed via the Account Setup.

Each document can be added via the create option and searched via the search option available in the respective menus.

Support

Support involves creating of Support Requests and managing the Contracts, further more Solutions and related Articles can also be added which form a part of the Knowledge base for Support.

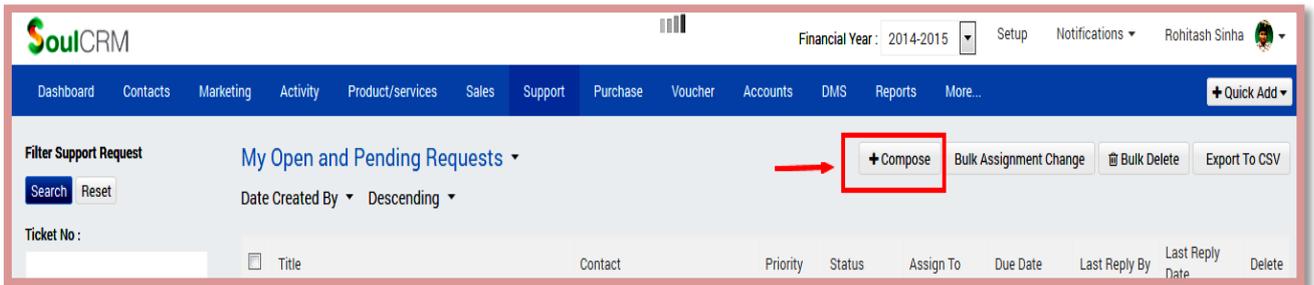
The screenshot displays the 'My Open and Pending Requests' section in SoulCRM. It features a navigation bar at the top with various menu items like Dashboard, Contacts, Marketing, Activity, Product/services, Sales, Support, Purchase, Voucher, Accounts, DMS, Reports, and More... The main content area shows a list of support requests with the following columns: Title, Contact, Priority, Status, Assign To, Due Date, Last Reply By, Last Reply Date, and Delete. The requests listed are:

Title	Contact	Priority	Status	Assign To	Due Date	Last Reply By	Last Reply Date	Delete
Re: Welcome to SoulCRM - Sesame # RSPL-SR-150220-287	sandhya@sesameindia.com	Low	Assigned	Rohitash Sinha			24-02-15 12:31	
OVERDUE Business Process understanding and Implementation # RSPL-SR-150209-265	Apal Vora	Medium	Assigned	Rohitash Sinha	09-02-15		09-02-15 10:22	
Issues at Shreeji Tyres # RSPL-SR-150205-253	Vinit Patel	High	Assigned	Rohitash Sinha		Rohitash Sinha	13-02-15 13:04	
OVERDUE Data Import - Contact # RSPL-SR-150205-252	Udeet J Banker	Low	Assigned	Rohitash Sinha	12-02-15		05-02-15 13:15	
OVERDUE Demo required for three new users at Finger Mate @ Punam Kanodia - going in phase wise manner would # RSPL-SR-150205-249	Punam Kanodia	Medium	On Demand Demo	Rohitash Sinha	13-02-15		05-02-15 12:17	
OVERDUE Demo To A Suspect (ADITYA ECLATERPRISE) # RSPL-SR-150102-198		Medium	Demo For Trial User	Rohitash Sinha	02-01-15			

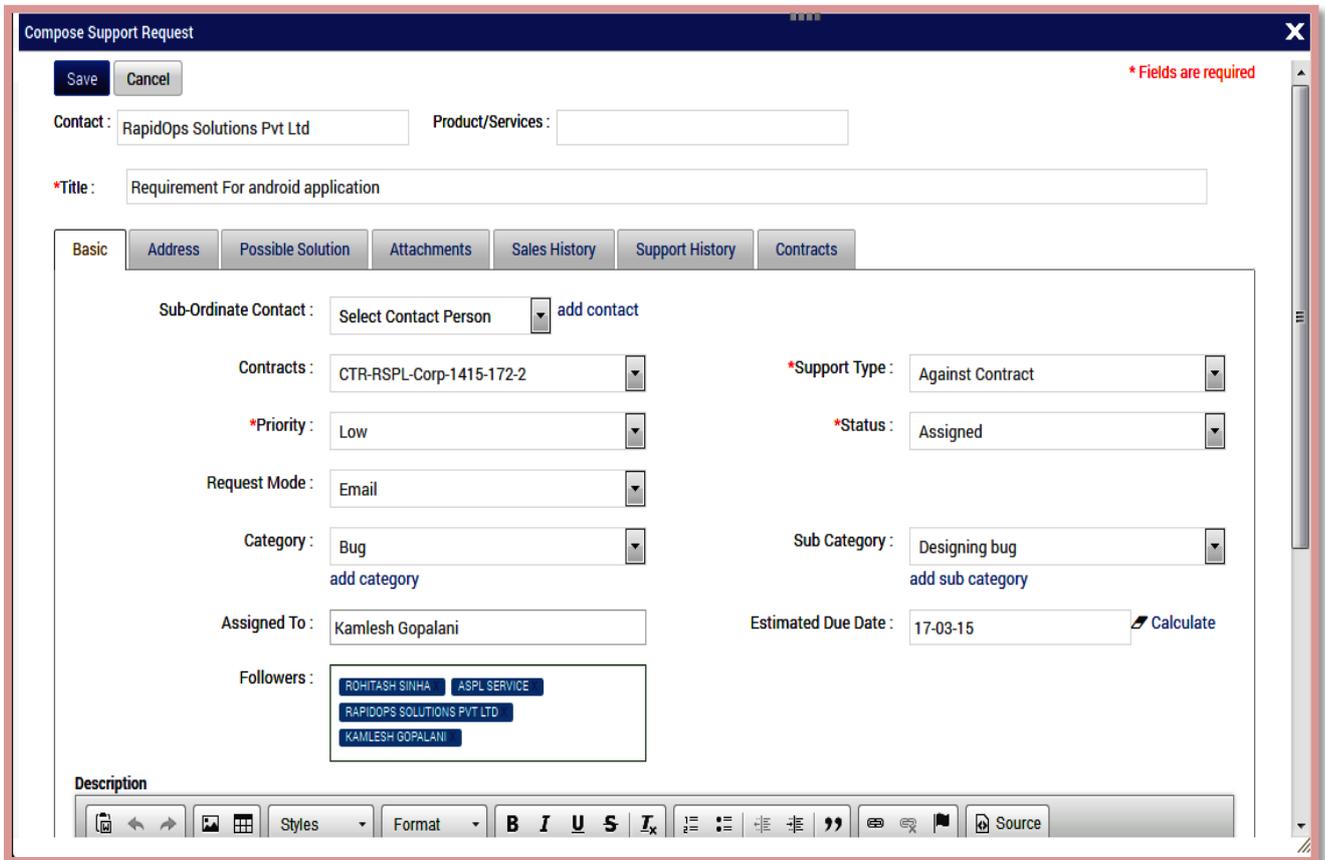
Showing 1 to 6 of 6

- Support requests can be created around the contact or the product and further follow-ups done on the Support request.

- The customer can be looped into the support request and intimated about the status / solution of the issue reported.
- While creating request useful documents, screen shots related to prior support given the contact, possible solutions, and sales related documents and related contracts with the Contact can be seen and attached.
- This helps the support desk to define the type of support to be extended and reduces the dependencies on various departments linked to the support.
- To create a Support Request, Click On Support > Request , Click +Compose and add the Support request details and assign.



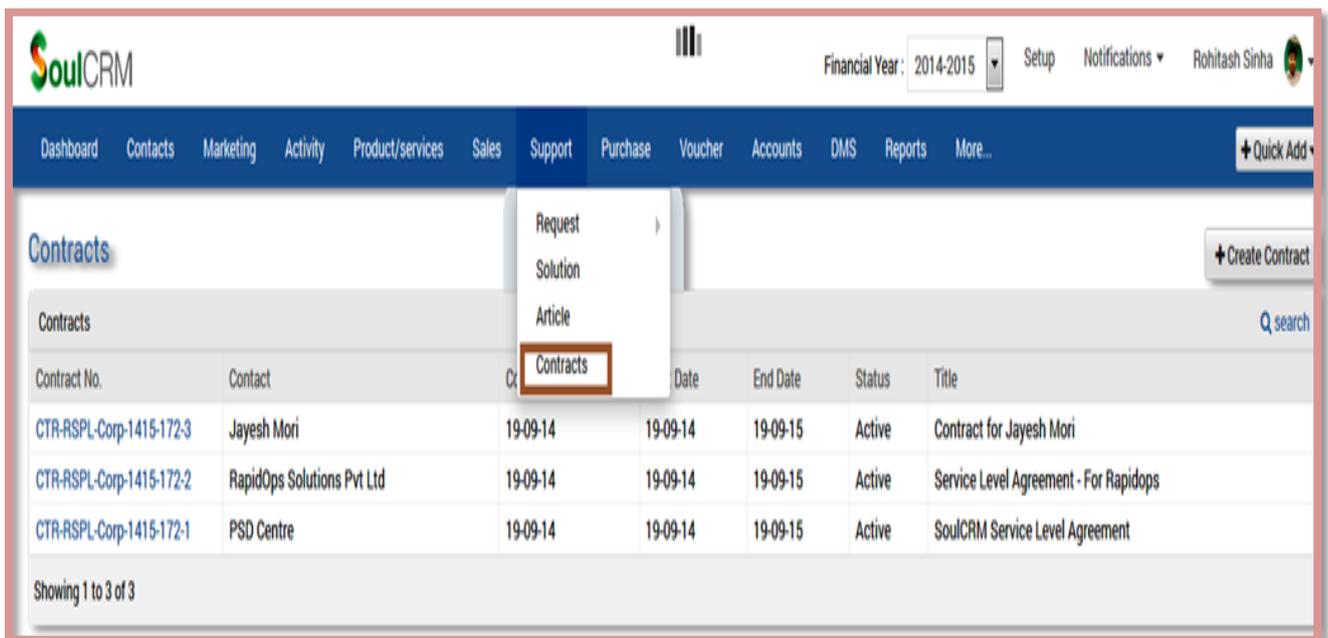
• Compose Screen



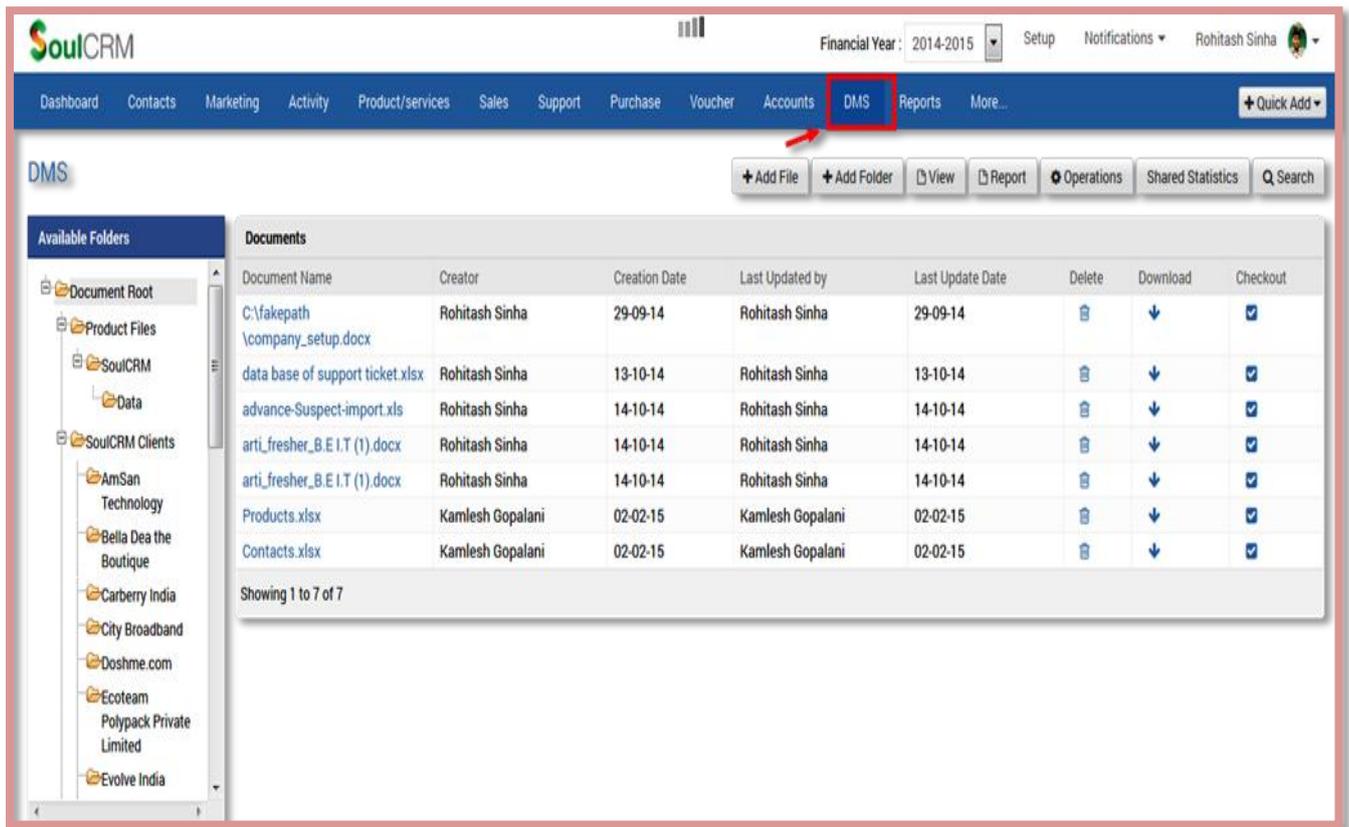
› **Contracts**

Contract is an agreement between the client and vendor with regards to service or maintenance of the products offered by the vendor.

- Contracts in SoulCRM capture the period of the contract
- The type of contract
- Free services offered
- Service locations to be covered
- Type of services (onsite or online or both)
- The products covered with batch serial numbers and also option to include parts under AMC
- Various templates can be defined for the Terms and Conditions and form the part of the Contract
- Once created the Contract needs to be activated.
- Upon activation the support calls and invoicing against the contract can be tracked / attached and reminders set for tasks viz. preventive maintenance or any other work related to the contract
- The contract can be printed or sent over email in the format selected.
- To create a Contract, Click Support > Contracts, Click on +Create Contract



› DMS (Document Management System)



- The document management system involves managing the documents in SoulCRM.
- Various documents can be added to SoulCRM.
- These documents can be further shared among the various users of the same company and intimated upon each change or even set forward in an approval flow for verifying the document.
- The documents can be stored in various folders which can be created as a tree structure in SoulCRM
- Also documents can be tagged, keywords added while saving the document
- Thus while searching the document apart from regular document name the document can be searched upon various properties attached to the document viz. date/ time , creator, name, tags, key words, etc.
- Various reports viz. download statics, viewed documents; etc can be generated for DMS system in SoulCRM.
- To add files to DMS, Click +Add File
- To add folders to DMS, Click +Add Folder
- Other available operations are View, Report, Operations, Shared Statics and Search the documents added.

› Reports

The reports module is the module which gives output of each module via various reports, *Some of the reports are*

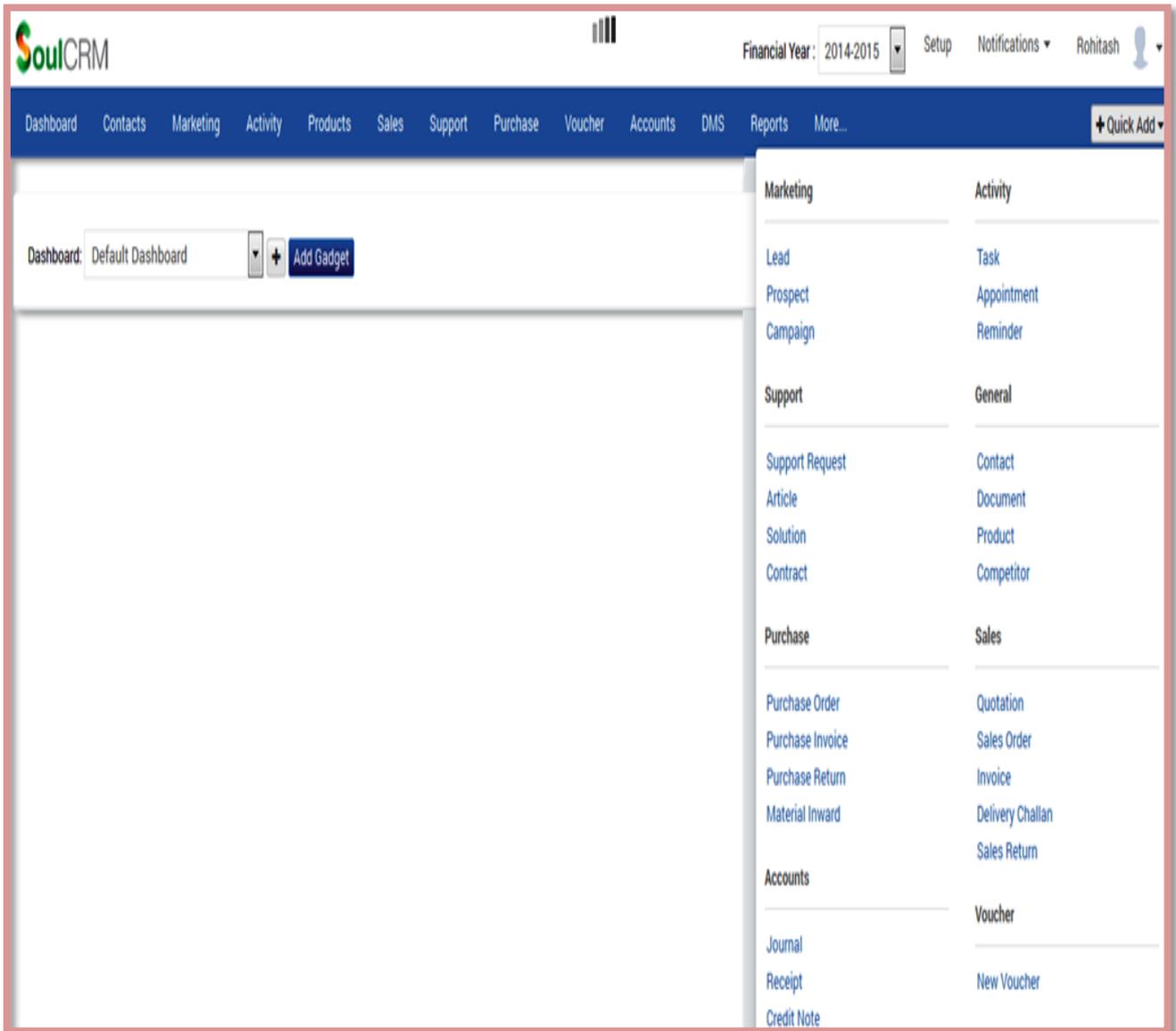
- Account Payable , Receivable and Party Ledger Report
- Payment Register Report
- Invoice Analytics
- Lead , Quotation and Sales Order Analytics
- Contact Summary Report
- Inventory Stock Movement/Traceability
- Stock Summary Branch Wise , Product Wise
- Stock Valuation
- Lead Industry Wise Report
- Lead by Employee, Source,
- Lead Forecast
- Lead to Invoice Report
- Miscellaneous Daily Work Report
- Payment Branch Wise , Employee Wise Collection
- Receipt Register Report
- Team Wise Collection
- Product Customer Wise Price List
- Location Wise Inventory Status
- Product Price Change Logs
- Supplier's Product List
- Suppliers List
- Threshold Stock Report
- Purchase Material Inward Register
- Purchase Invoice Register
- Purchase Invoice VS GRN Imbalance

- Purchase Order Wise Material Inward Register
- Purchase Order Register
- Sales Delivery Challan Register
- Invoice Register
- Quotation Register
- Sales Invoice Pending From Delivery Challan
- Sales Order Pending For Delivery Challan
- Sales Order Pending For Invoice
- Sales Order Register
- Statutory ACES Dealer Excise Return
- VAT Purchase Register
- VAT Sales Register
- VAT-201A
- VAT-201B
- Support Contract General Report
- Employee Support Workload Graph
- Support Status Graph
- Tally Report
- Task Activity Wise
- Sub-Activity Wise
- Task Report To Me
- Task Status Graph
- Task User wise Activity
- Voucher Summary Report

► Quick Add

The Quick Add Button is available throughout the software in the top right corner of the module bar.

It includes module wise links to adding /creating documents like Lead, Support Request, Tasks, Quotation, etc. Thus instead of going to the specific menu and creating the document the document can be created via the Quick Add button.



► Notifications

This section of SoulCRM keeps the user upto date with the Activity happening within the SoulCRM among different users. the Purpose of this section is to keep in account of different activity happening around different accounts with current time. The notifications are like when a Lead is created, A Task has been assigned, An approval flow for Sales & Purchase and Support.

The screenshot shows the SoulCRM interface with the following elements:

- Header:** SoulCRM logo, Financial Year: 2014-2015, Setup, Notifications (dropdown), Rohitash Sinha (user profile).
- Navigation Menu:** Dashboard, Contacts, Marketing, Activity, Product/services, Sales, Support.
- Dashboard:** Default Dashboard (dropdown), Add Gadget button.
- Support Request assigned to me:**

ID#	Title
265	Business Process understanding and Implementation
252	Data Import - Contact
249	Demo required for three new users at Finger Mate @ Punam Kanodia - going in phase wise manner would
198	Demo To A Suspect (ADITYA ECLATERPRISE)
253	Issues at Shreeji Tyres
288	Re: Welcome to SoulCRM - Sesame
- Notifications List:**
 - Task:** Implementation for Anagen Pvt. Ltd. (Dr. Rahul) 09-03-15 13:15 [clear](#)
 - Support:** Mr. Rajesh who would be using soulCRM on behalf of Carberry requires Functional Demo in steps for a week rather going in a one go 13-02-15 11:47 [clear](#)
 - Support:** Sai Kumar - ICUBE 13-02-15 11:44 [clear](#)
 - Support:** Business Process understanding and Implementation 09-02-15 10:22 [clear](#)
 - Support:** Data Import - Contact 05-02-15 13:15 [clear](#)
 - Support:** Data Import - Contact 05-02-15 13:14 [clear](#)
 - Support:** Demo required for three new users at Finger Mate @ Punam Kanodia - going in phase wise manner would have to complete it within week. 05-02-15 12:17 [clear](#)
 - Support:** Rajesh Chettyar will be handling Carberry from now on hence detailesd Demo required in phase wise maneer for a week, rather than going in a single shot. 05-02-15 12:14 [clear](#)
 - Task:** SMS Topup for 10000 initial SMS to City Broad Band Account 19-01-15 14:43 [clear](#)
 - Task:** DoshMe - Email Campaign Setup - Send Grid Account creation 19-01-15 11:23 [clear](#)
- Right Panel:** + Quick Add button, Date dropdown menu (showing 17-02-15, 13-02-15, 09-02-15).
- Footer:** View More Notifications link.

► User Specific Settings

- User Specific Settings can be defined from **My Account** Menu available on clicking the User Picture on the Top Right hand side corner.
- Default **Time zone**, **Date** and **Time format** along with **Incoming** and **Outgoing** E-mail Accounts can be defined here.
- Likewise each user can define his **Incoming** and **Outgoing** E-mail Accounts or the Admin can configure it from Employee Master.
- The E-mail Section is a replica of your Mail box, it shows the entire IMAP Mail folder.
- SMS section shows the SMS sent through the system and their status

- Reminders section shows the Reminders set through various modules and also allows to create Reminders
- Feedback section allows submitting Feedback to the SoulCRM team.
- Logout logs you out of the system.

