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...

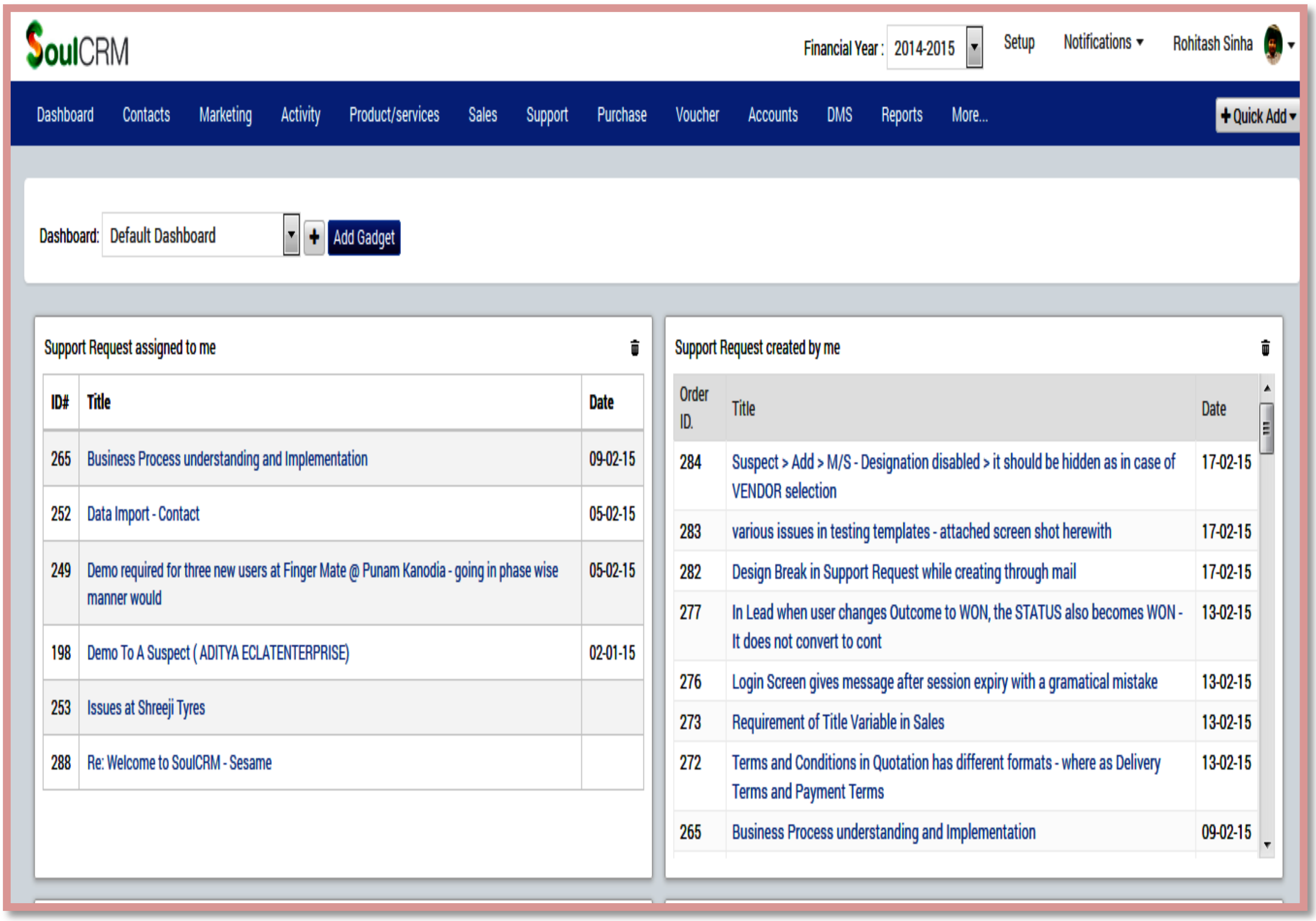
Dashboard

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.

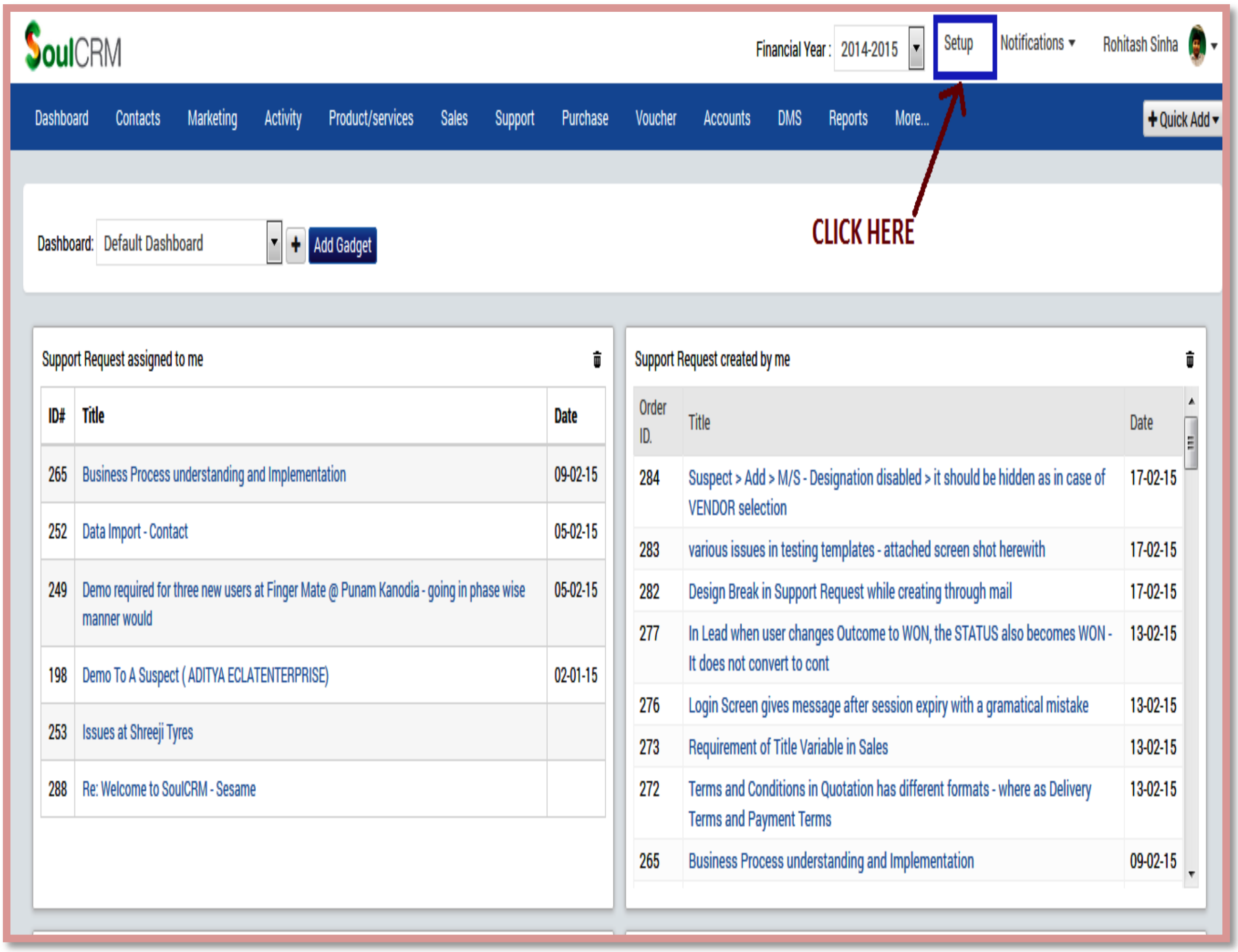
- SoulCRM allow user to add all the available gadgets in his dashboard, but user needs to have **Rights** for the same else he won't be able to **access** the gadgets

The Dashboard appears as below.



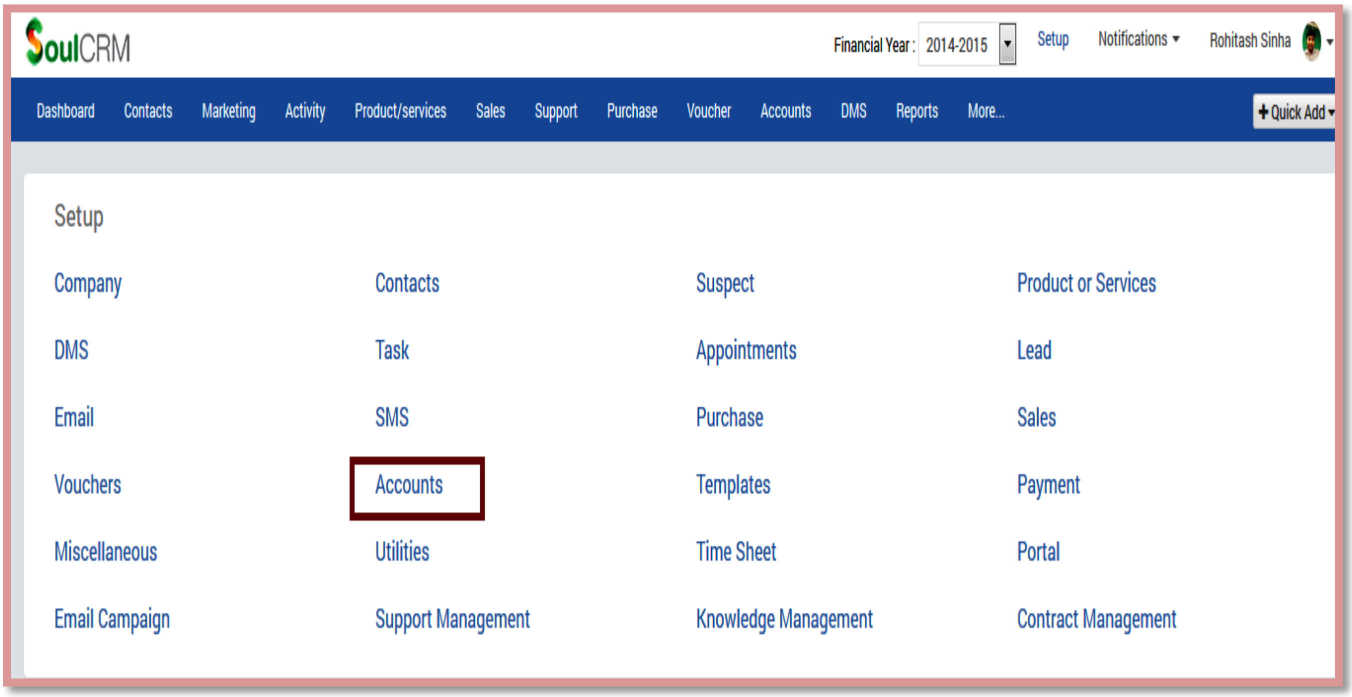
Setup

- 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.

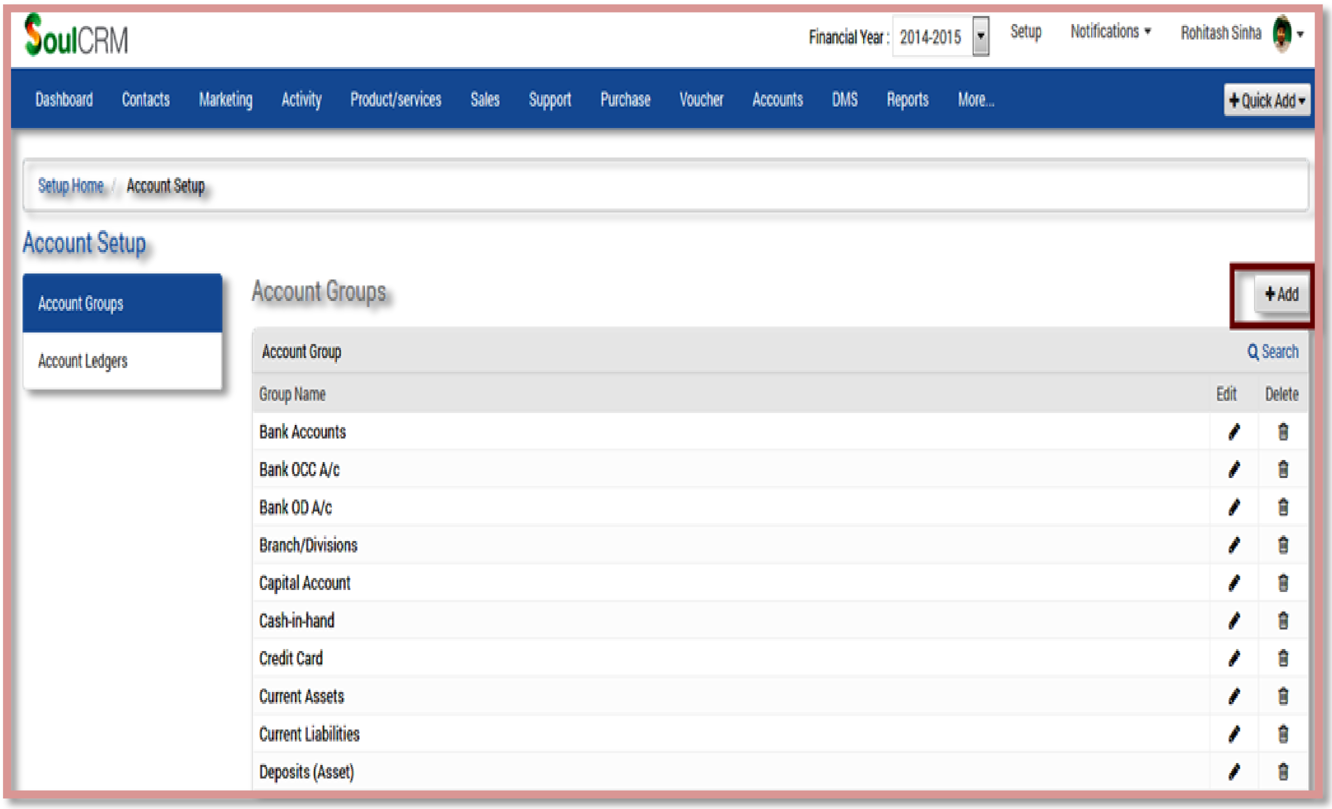


Accounts Groups and Ledgers

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



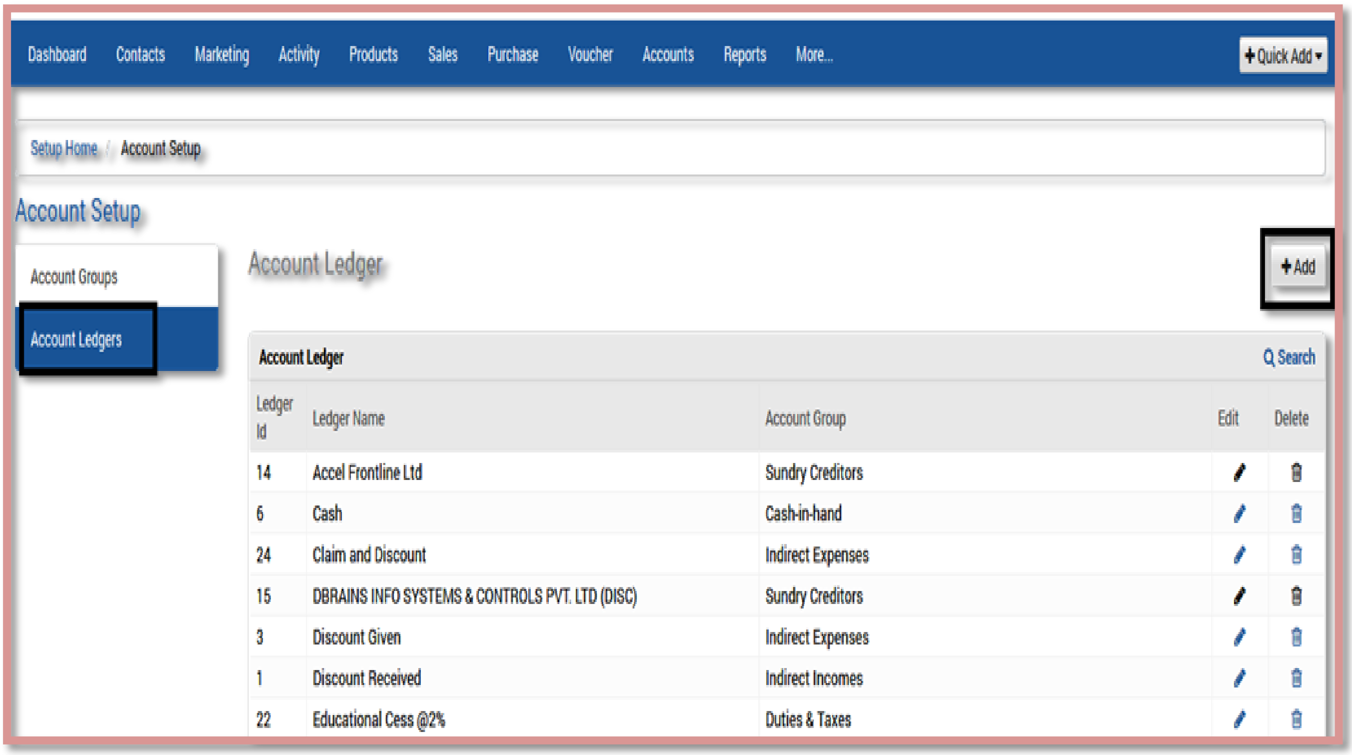
- Accounts group can be created from Setup > Accounts > Accounts Group > + Add



- Next define **Account Ledgers**

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

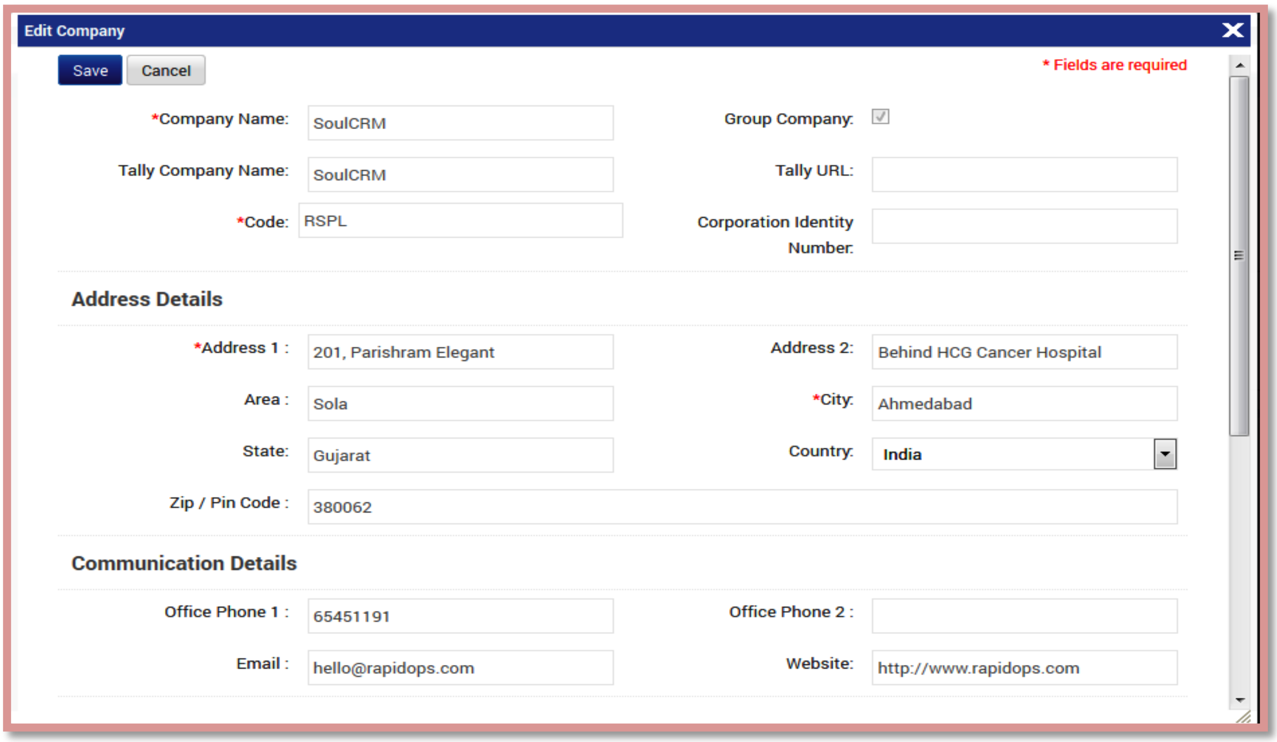
  These account ledgers and their Accounts Group mapping should be the same as that in your accounting software (Tally).



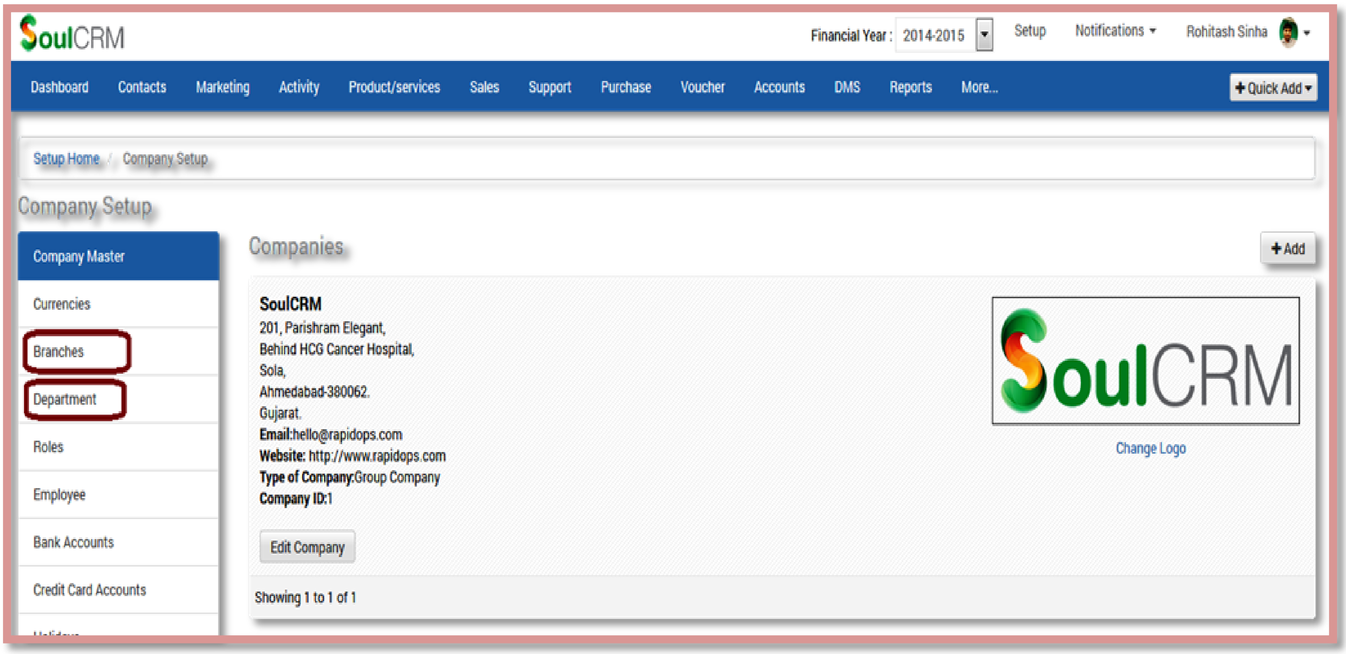
Note: Accounts Group and Ledger needs to be configured only if Accounting Module / Tally Integration are being opted for.

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

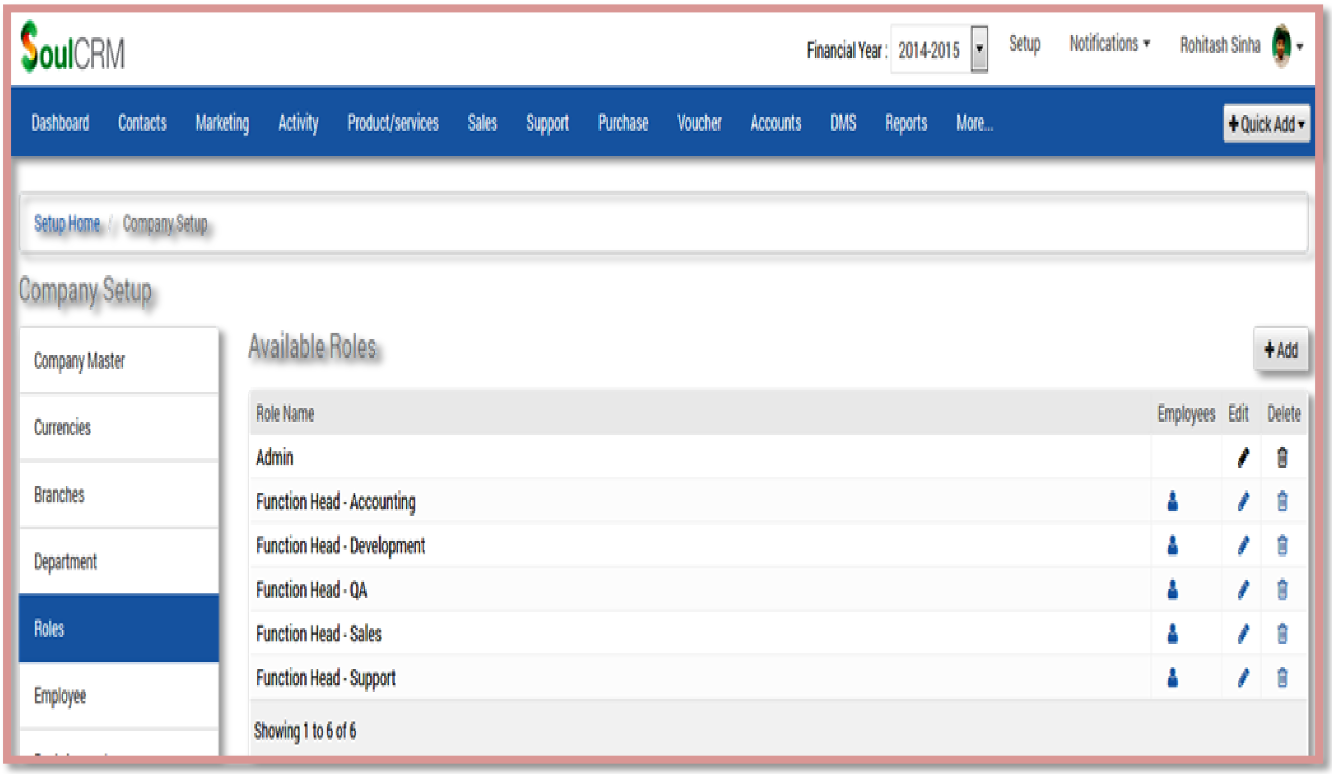


- Define **branches** (branch name, code, applicable statute) if applicable. By Default Main Branch exists in the system.
- Define **departments**. Add the departments applicable in your company.



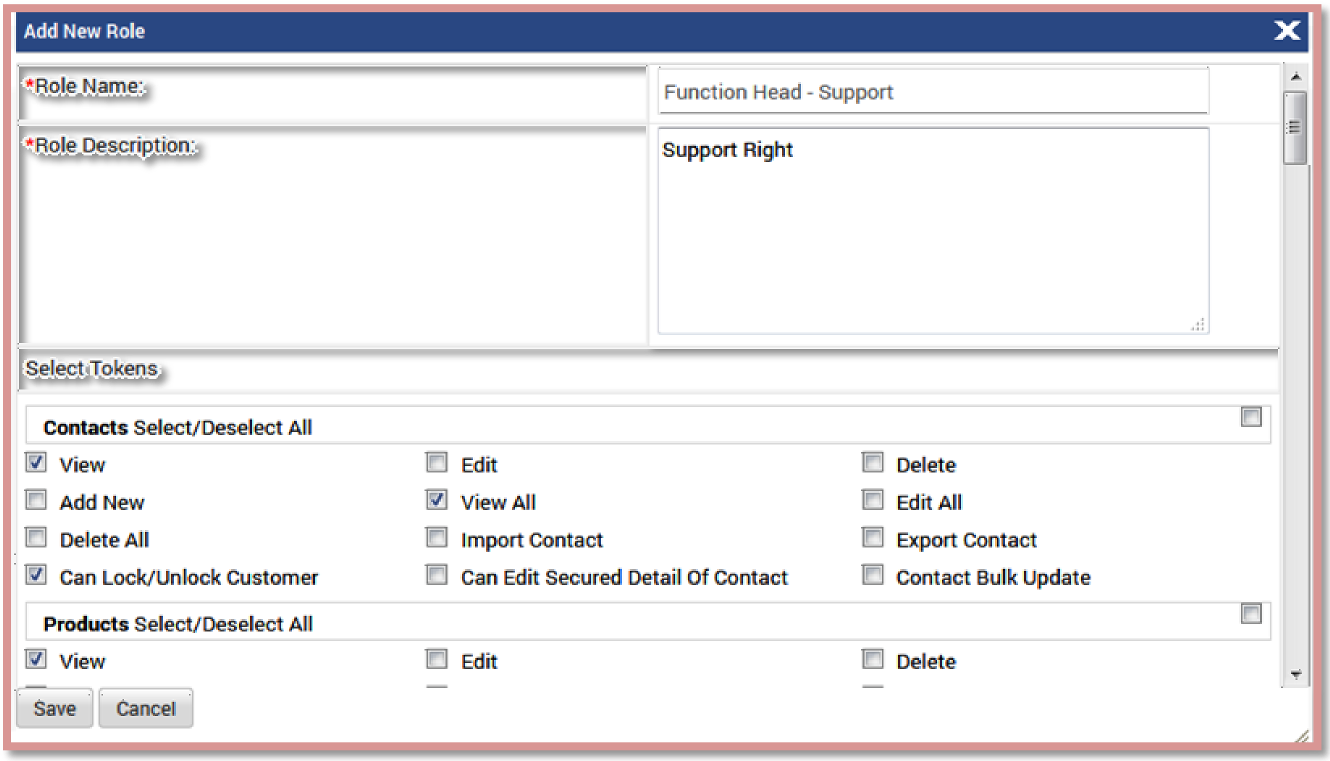
Define **Roles**

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



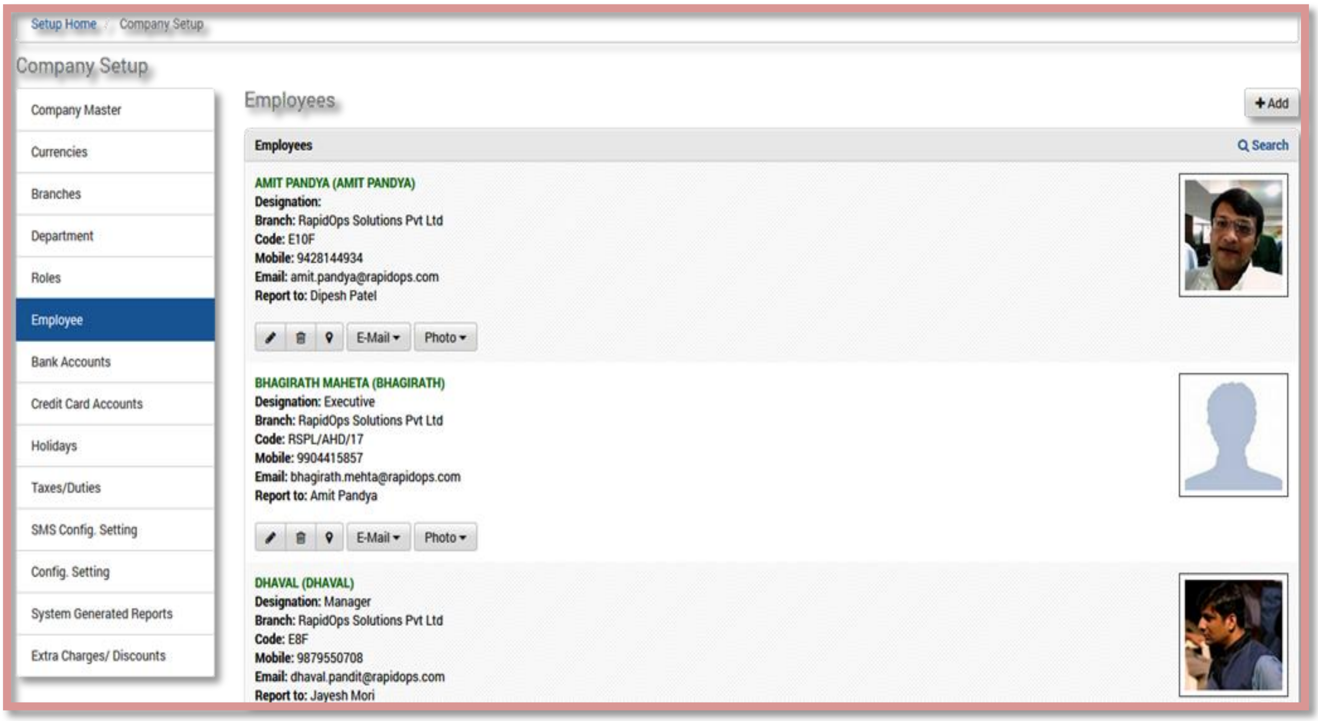
- Multiple roles can be defined and assigned to a user. In case of multiple roles all tokens covered under various roles will be applicable to the user.

- 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

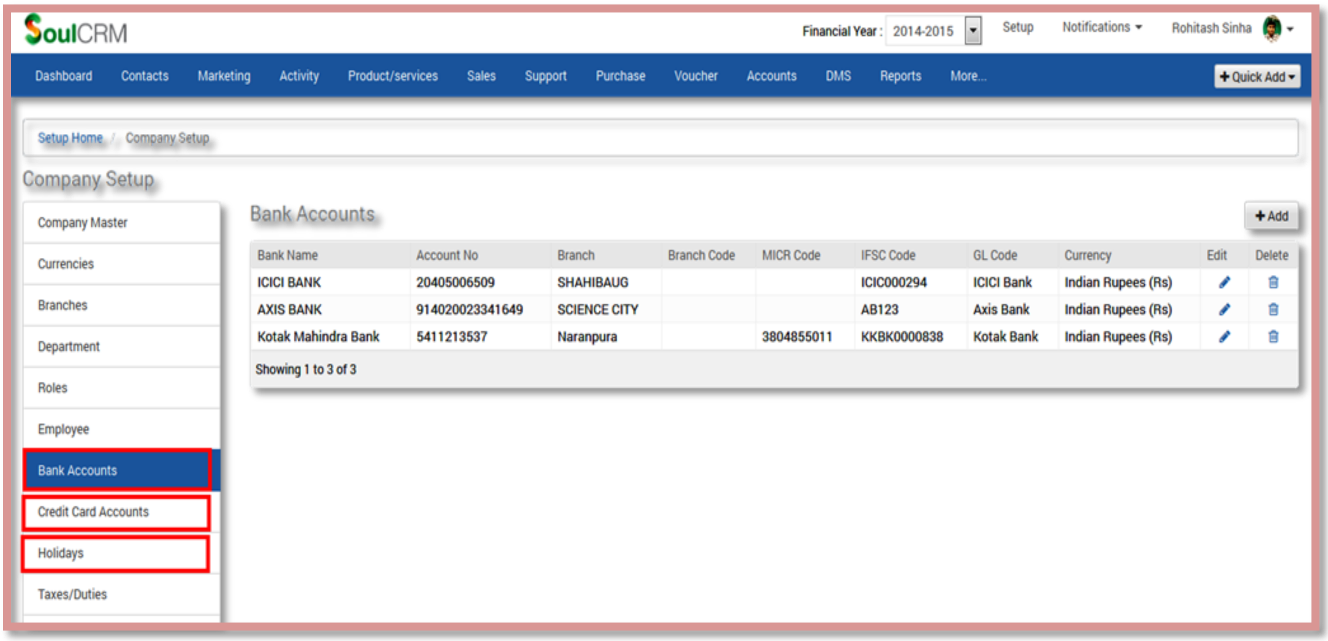


- Maximum of employee you can add in SoulCRM link equals user licenses you've purchased.
- The number of active employees will be counted towards your license.
- Default employee is Admin.
- This Employee can be edited, renamed and details updated in the system.
- This Employee has to be defined as the 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**

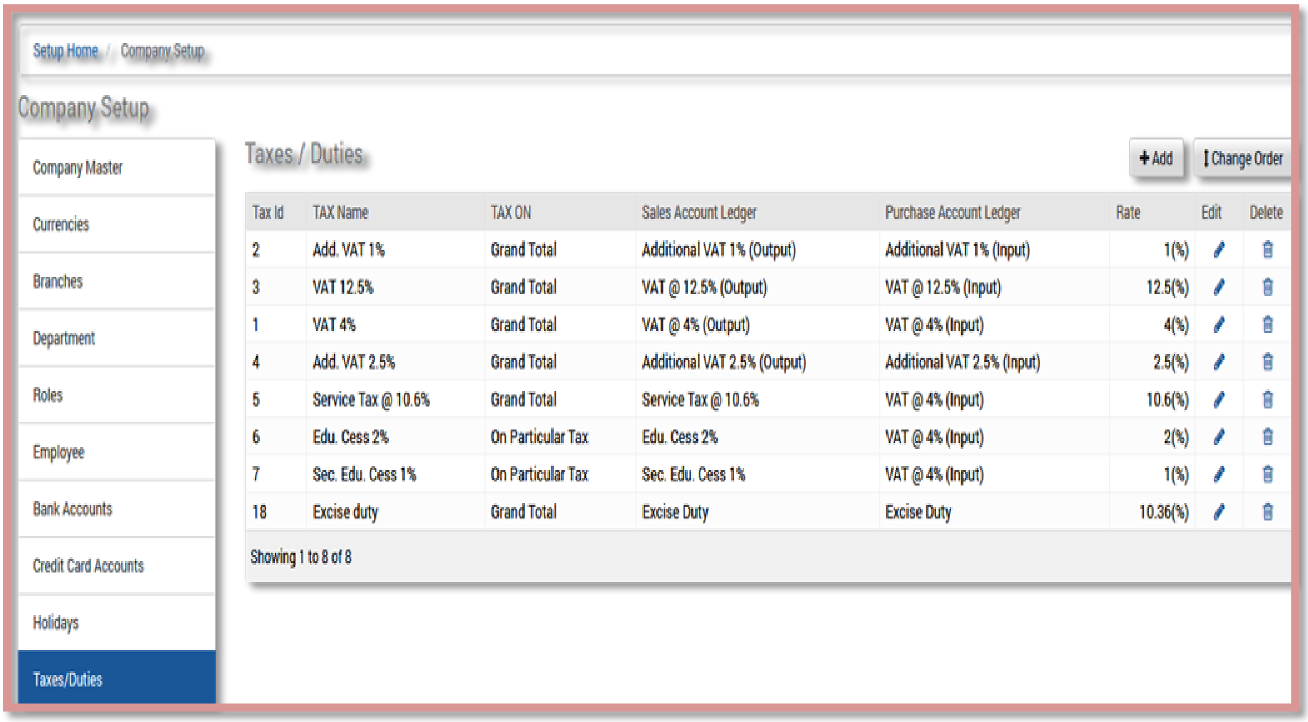
Select the Week day for Week Off and define the Holiday Dates.

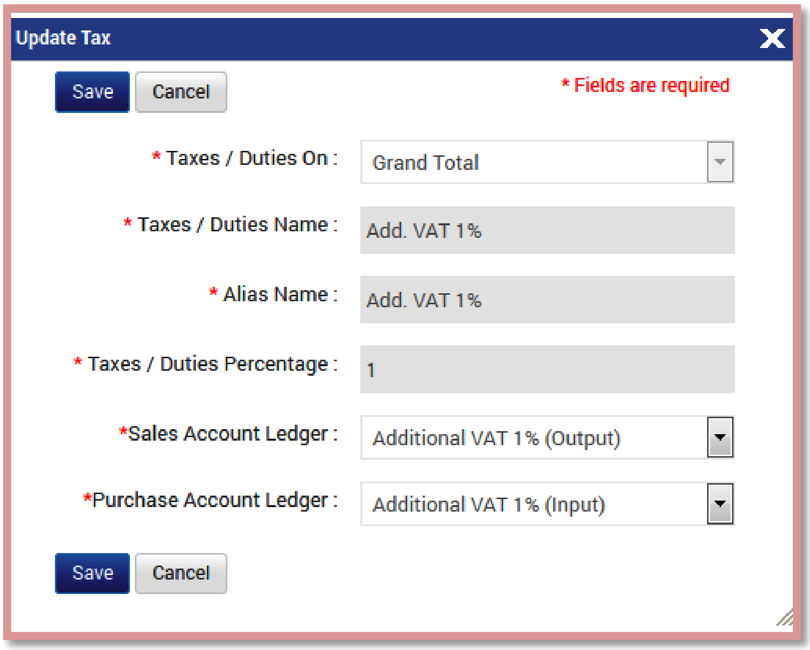
This is useful while providing access to employees. Employees will not get access on the defined holidays.



Define **Taxes / Duties**

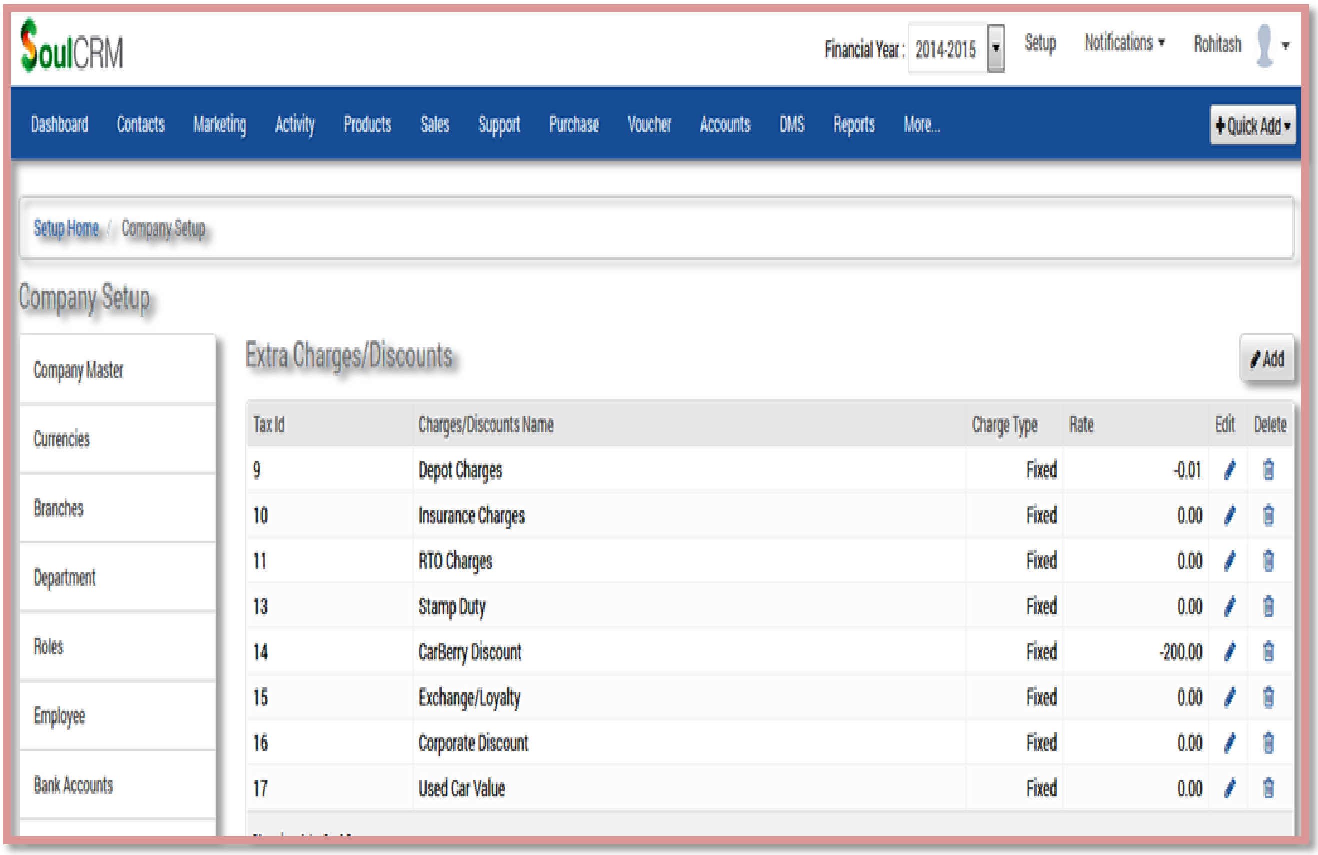
- Various taxes and duties can be defined based on applicability in your company.
- Taxes / Duties based on Grand Total, A particular tax, Grand Total including above taxes can be defined.
- This will help us define various types of taxes and their working viz. VAT, CST, Service Tax, etc.

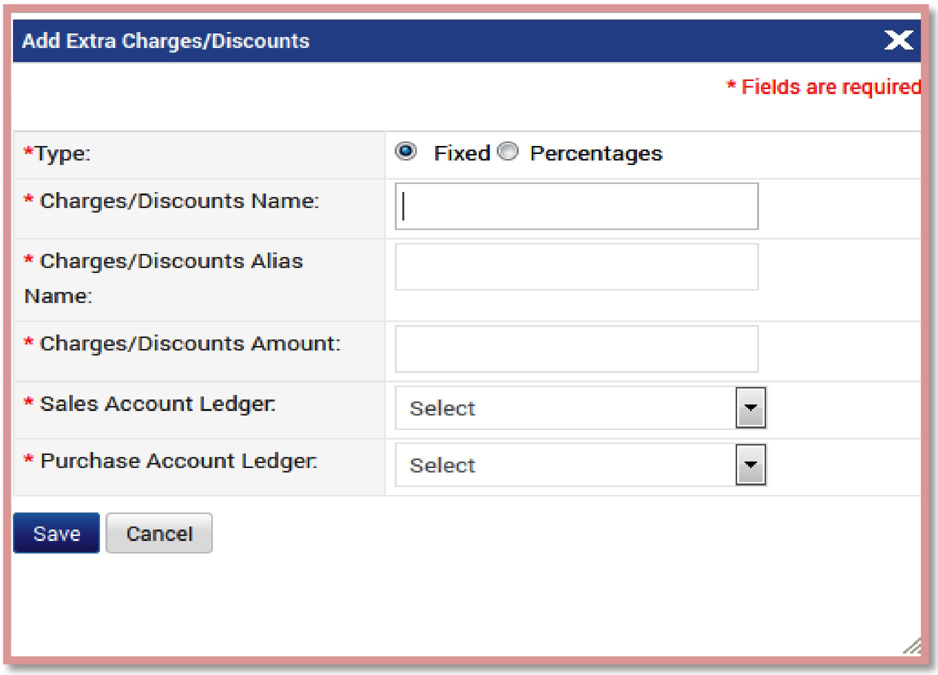




Define **Extra Charges / Discounts**

- 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

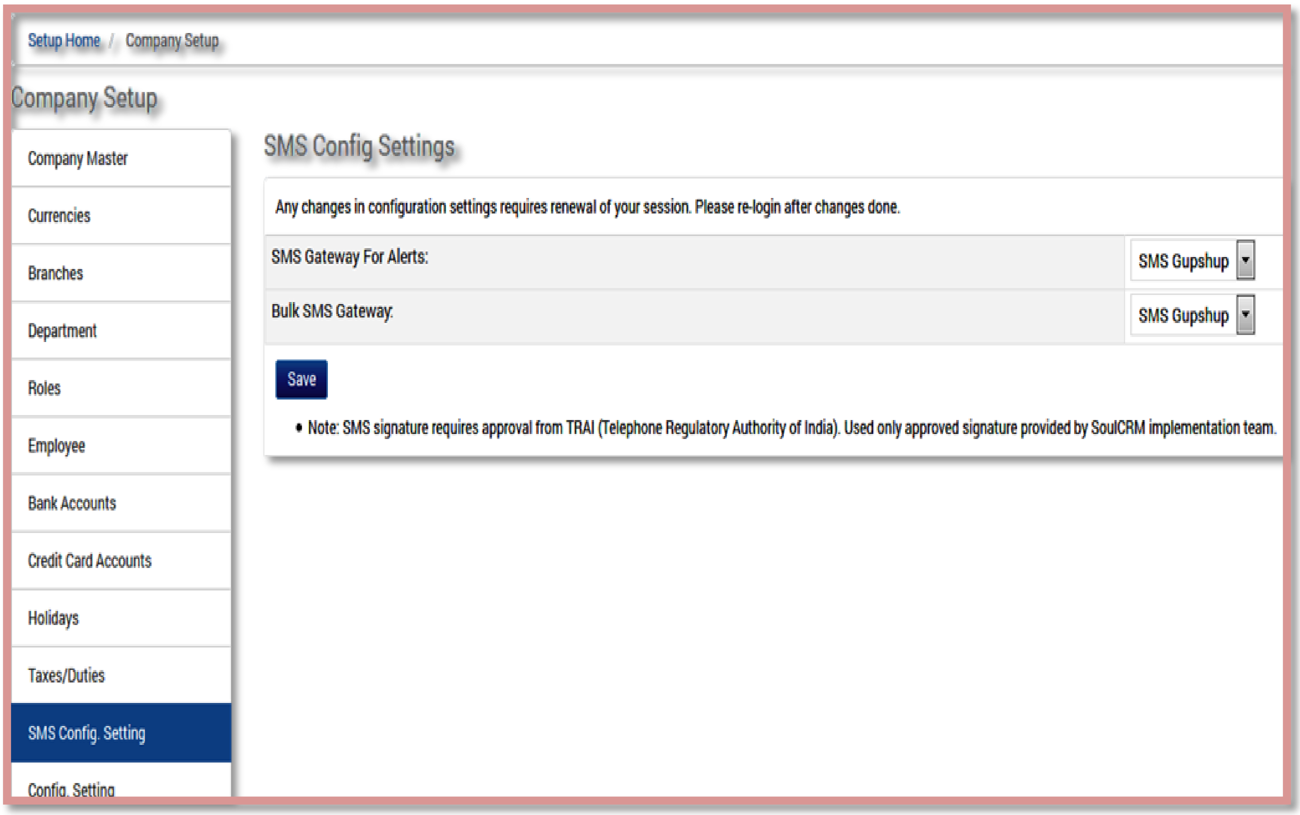




Note: All discounts need to be appended by a (-) when using in various Sales, Purchase documents.

SMS Configuration Settings

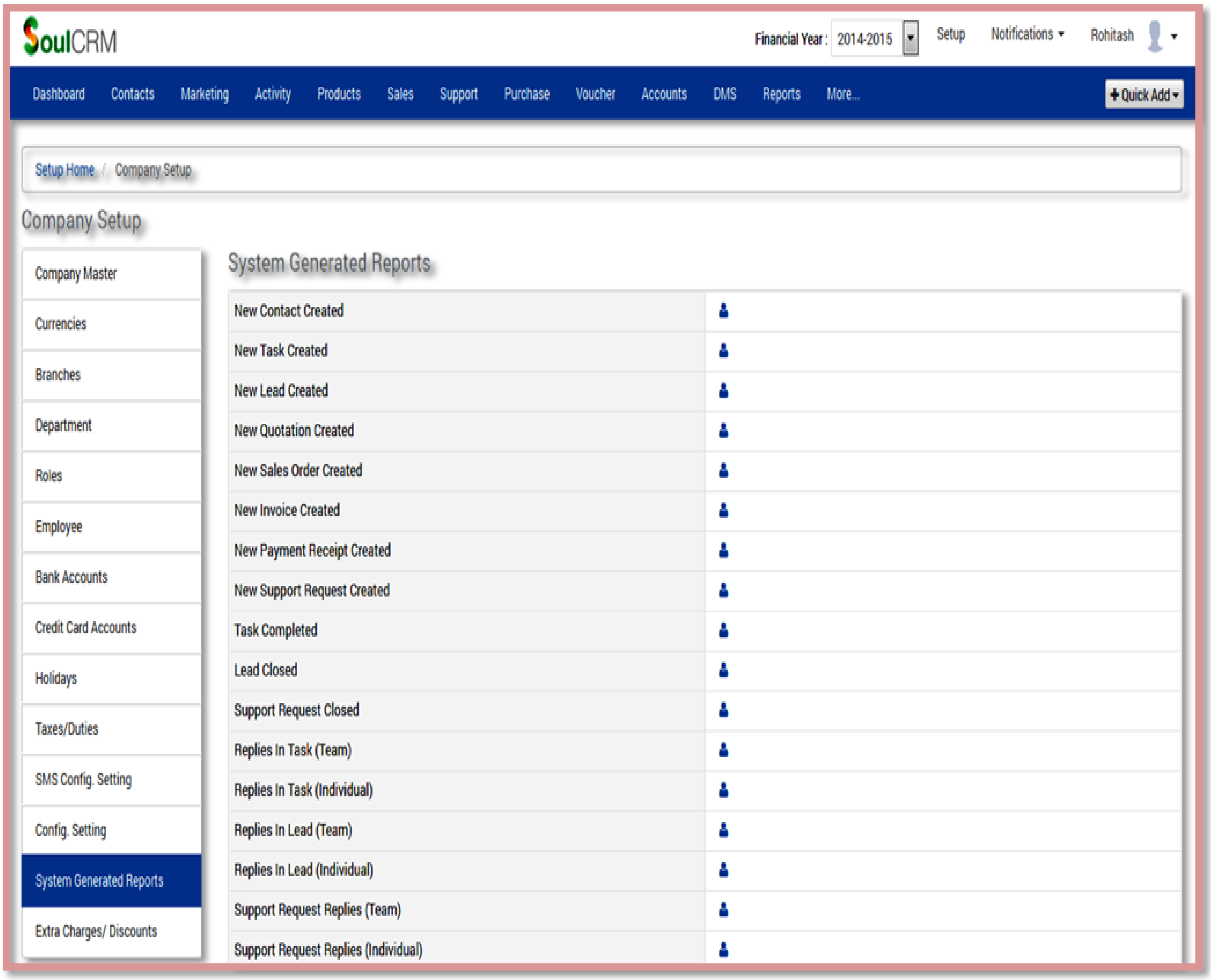
When user opted for SMS services has to configure **SMS** settings under **setup** and then map the service provider **SMS gateway** in the company setup under **SMS configuration** settings.

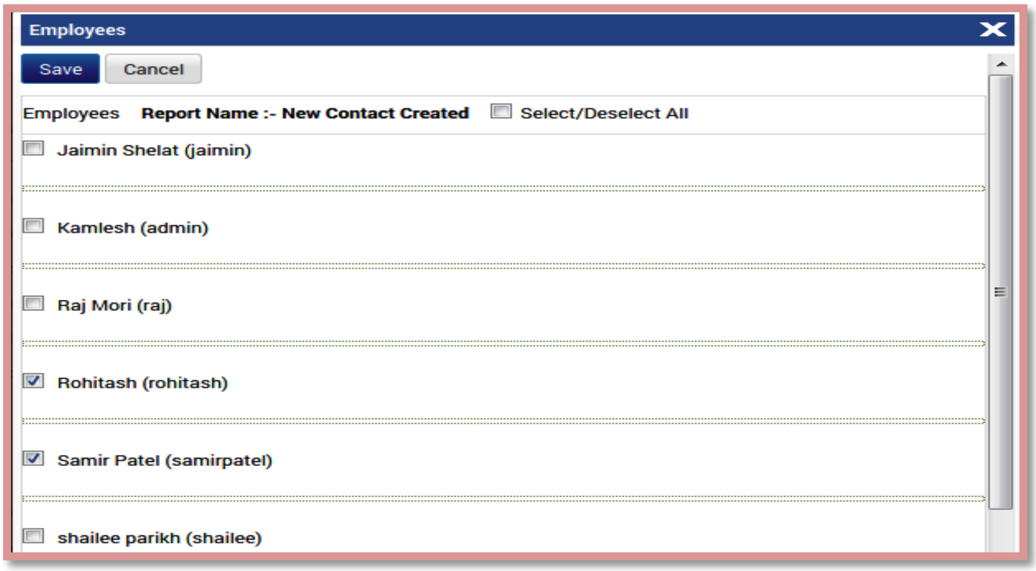


It has to be noted that the recommended service provider for SoulCRM is **SMS Gupshup (http://gupshup.me)

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.**

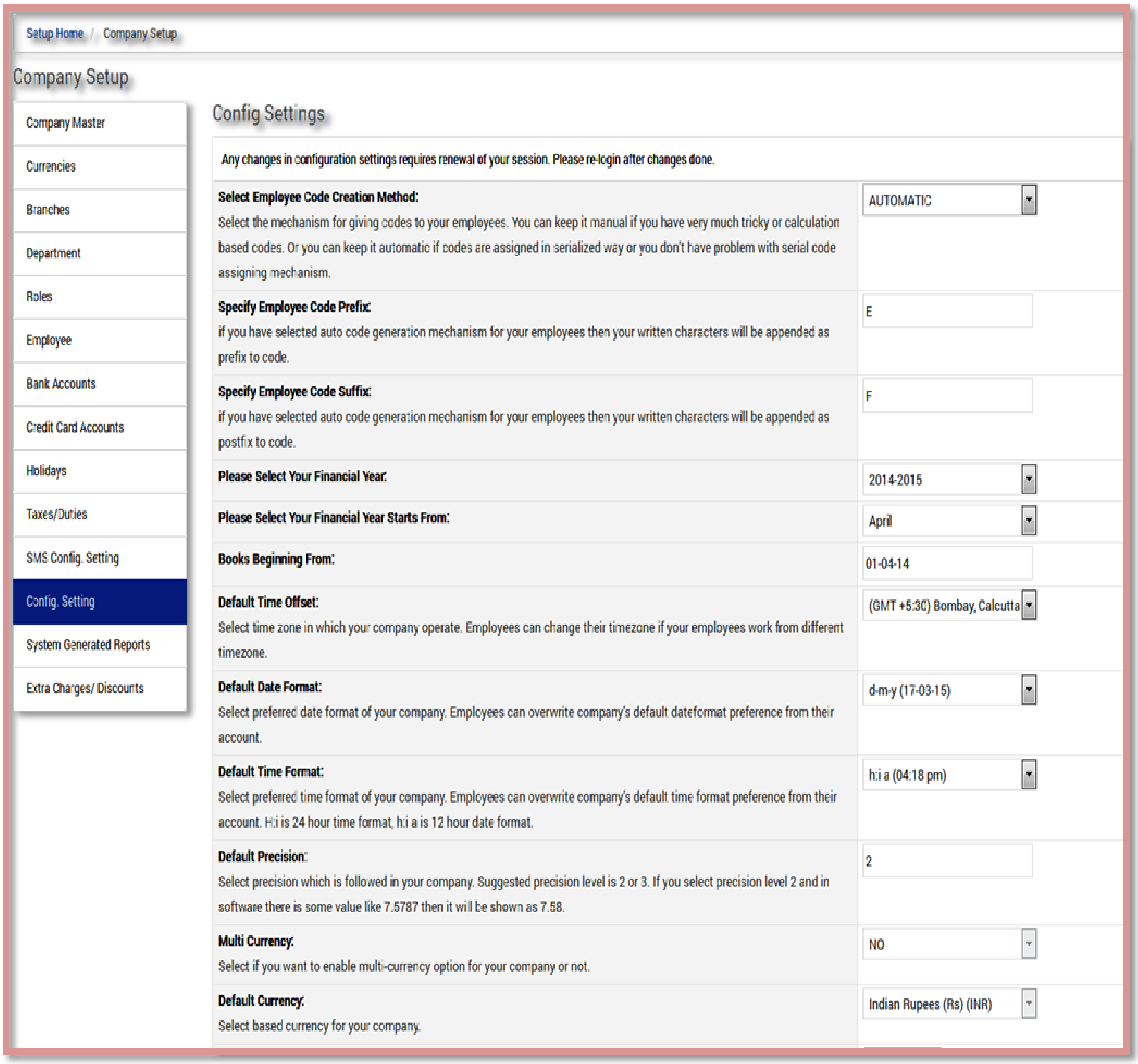




Configuration Settings

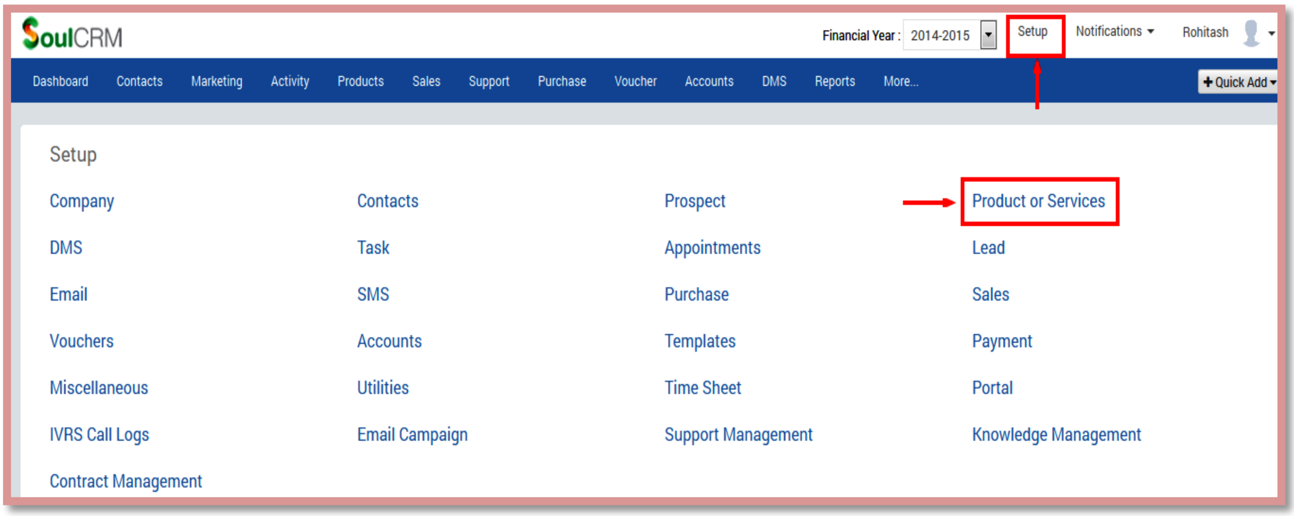
Various settings listed under can be configured using the configured using the configuration settings link.

- 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

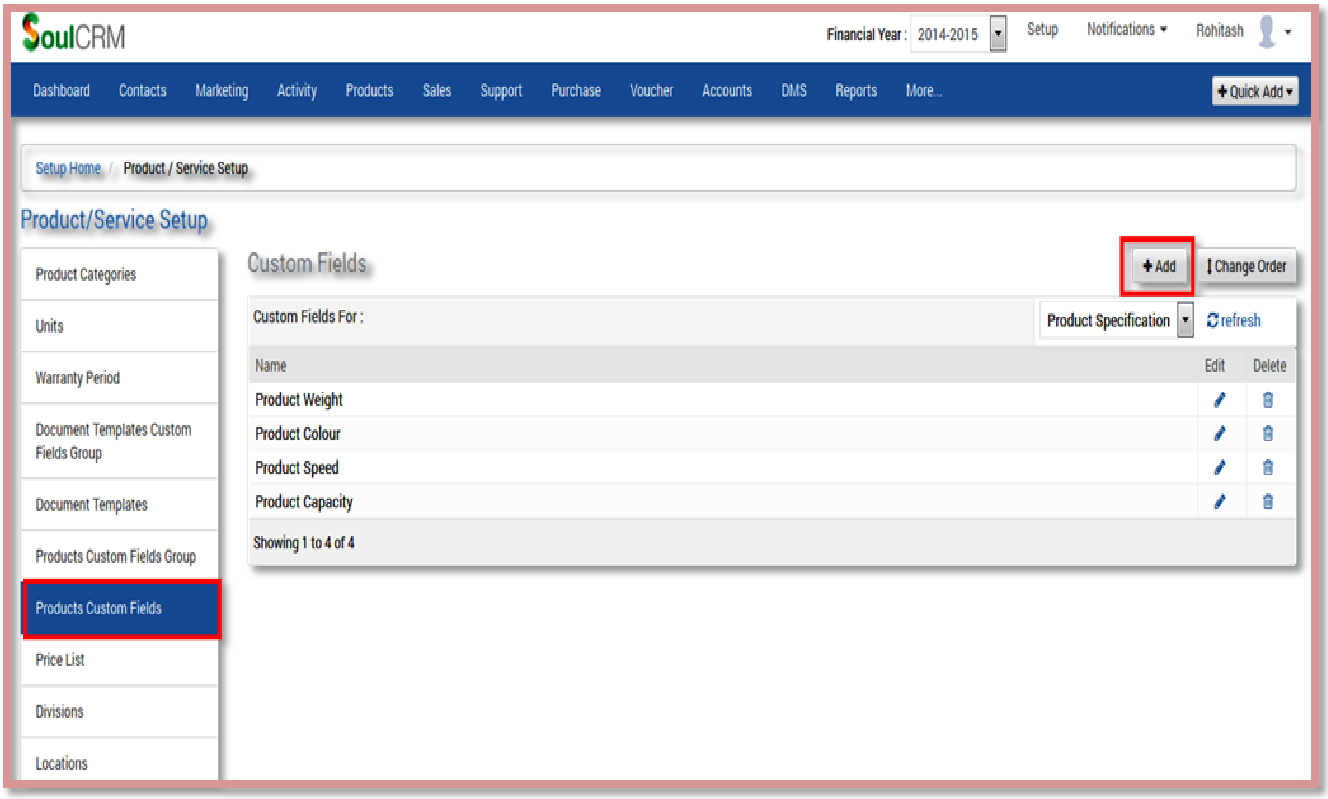


Product or Services Setup

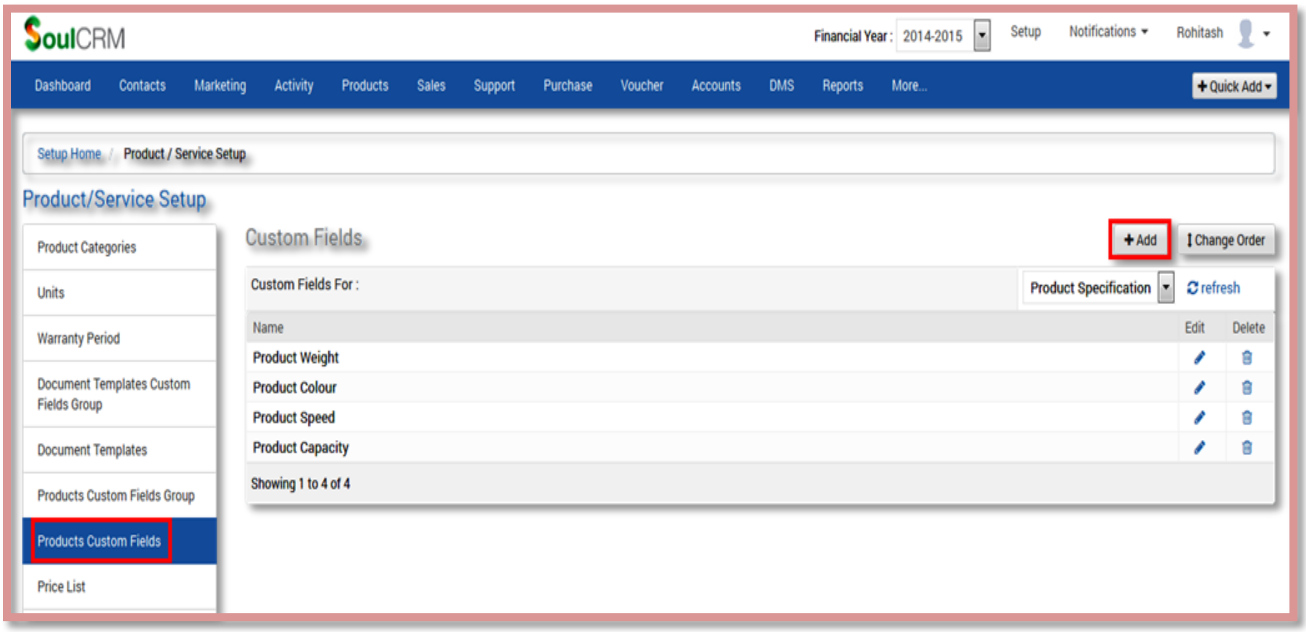
Next Configure Products or Services via **Product or Services Setup**



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.



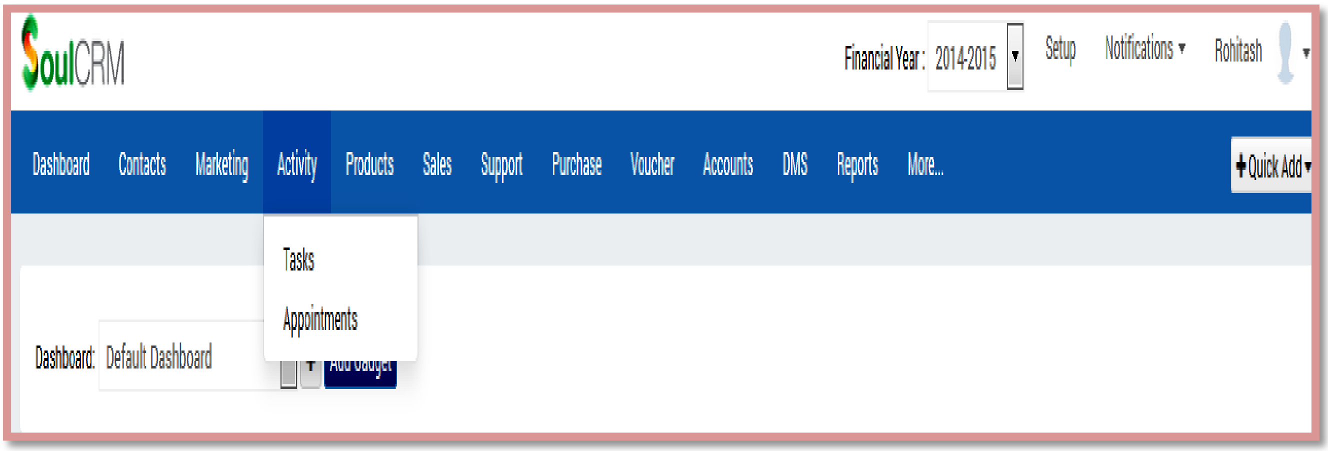
To add a product, click + Add Products and enter the requisite details.



- 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

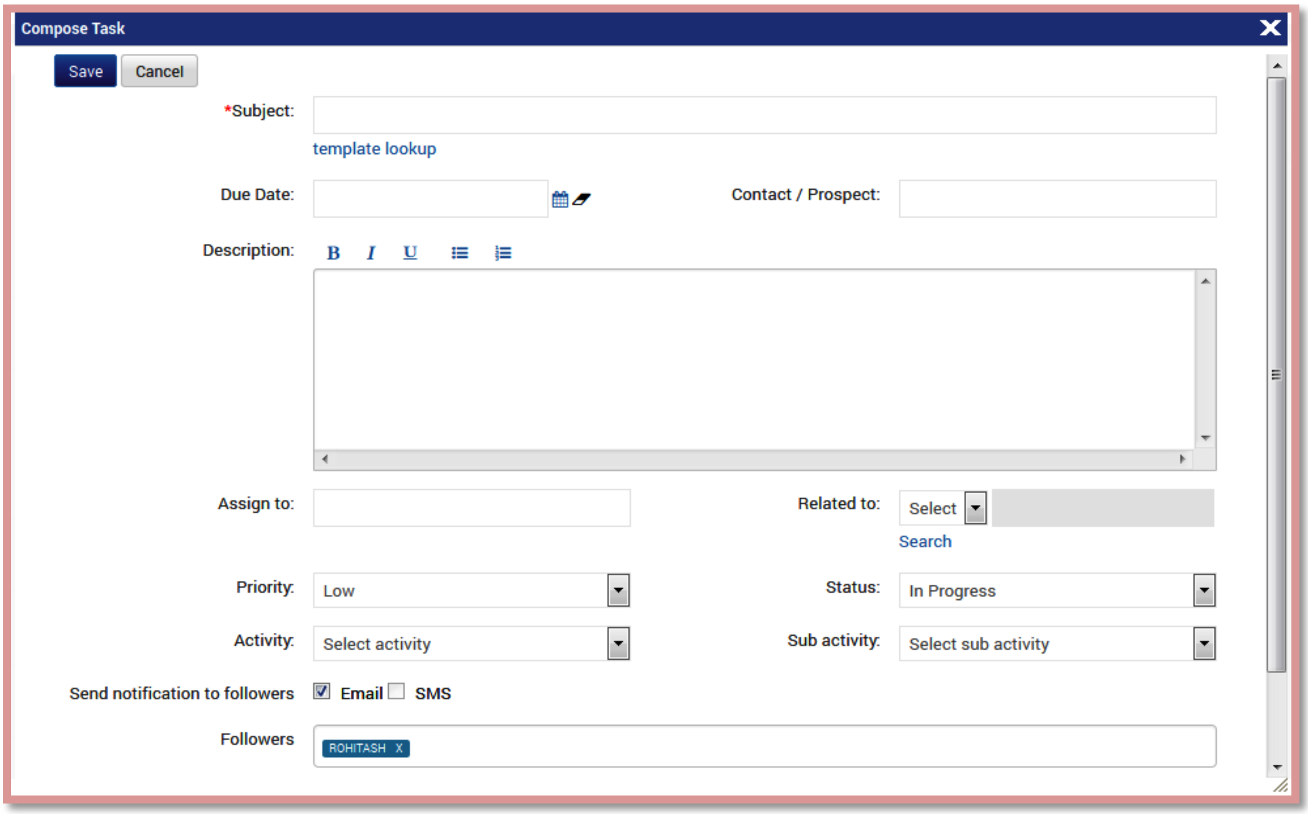
2) Appointments

Task

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

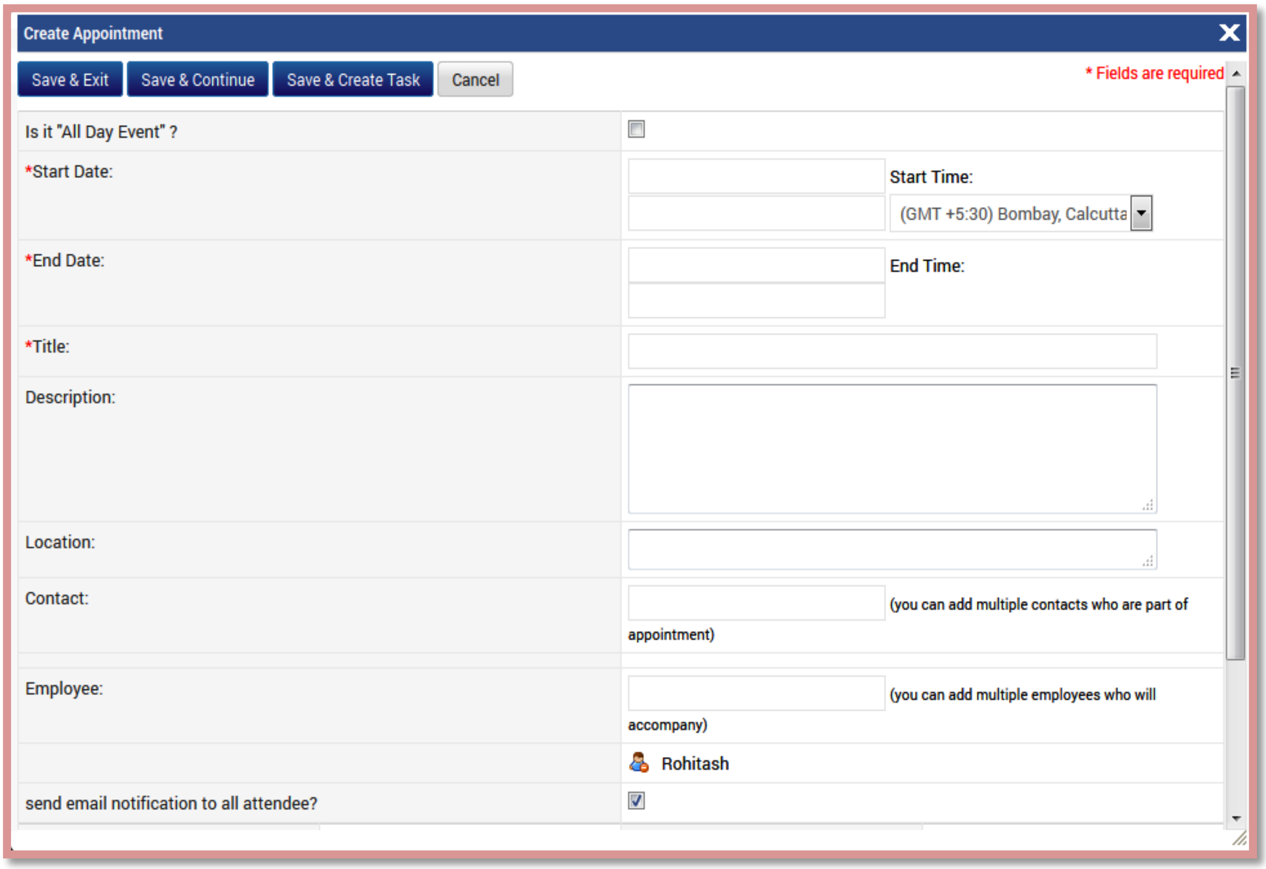
The task will be assigned to the Employee and a notification available to him the Notification Area. This task will appear in the My Open and Pending Tasks for the user it is assigned to.

- 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



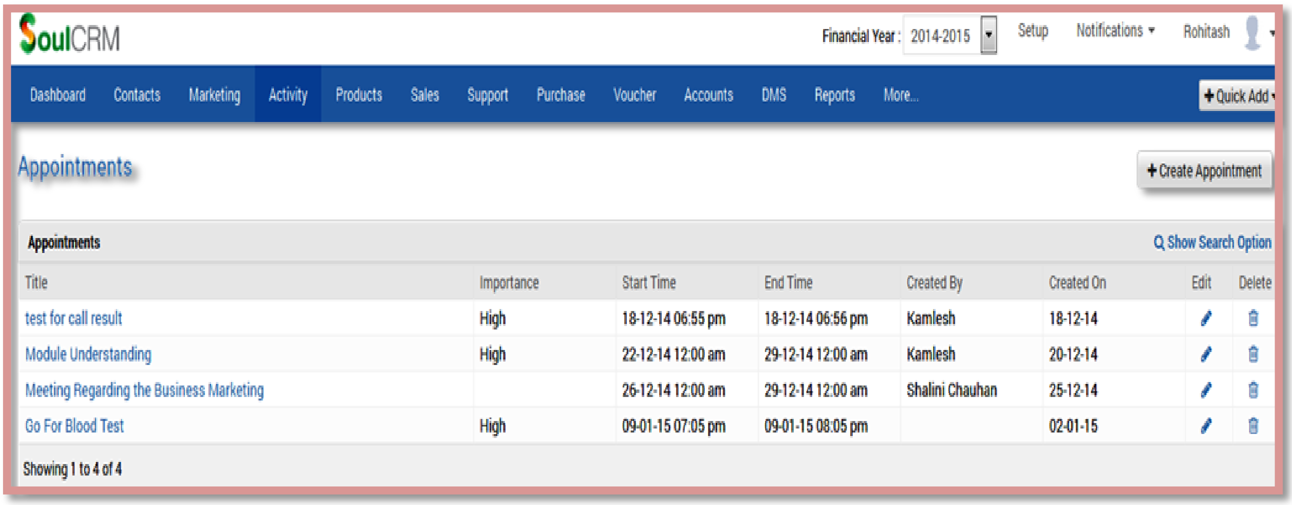
Appointments

- 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.



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

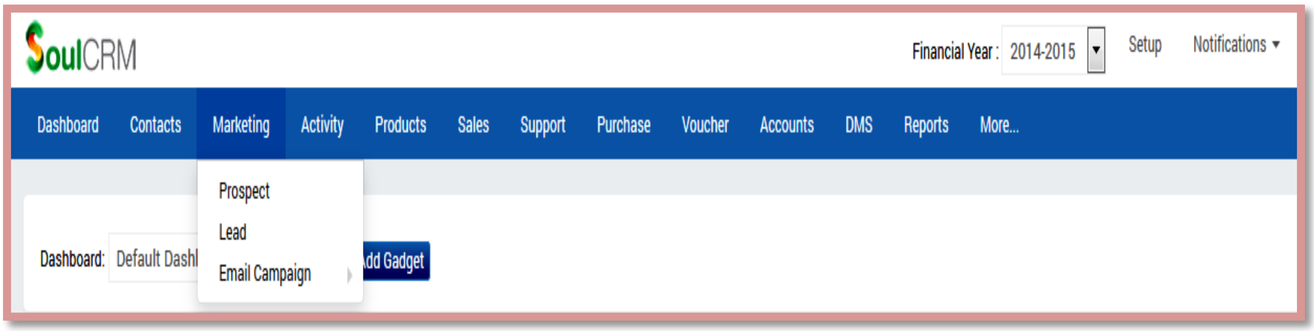
Also search option is available to search the task based on its priority, duration, contact, employee involved, importance and type.



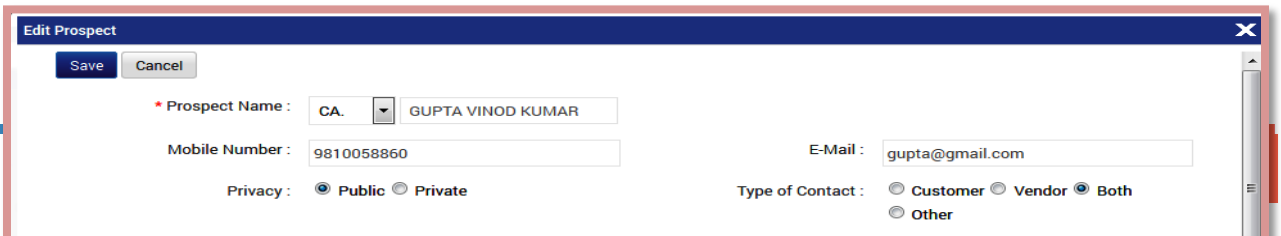
Marketing Flow

Marketing involves

- Raw Contact and
- Lead Management
- Email Campaign

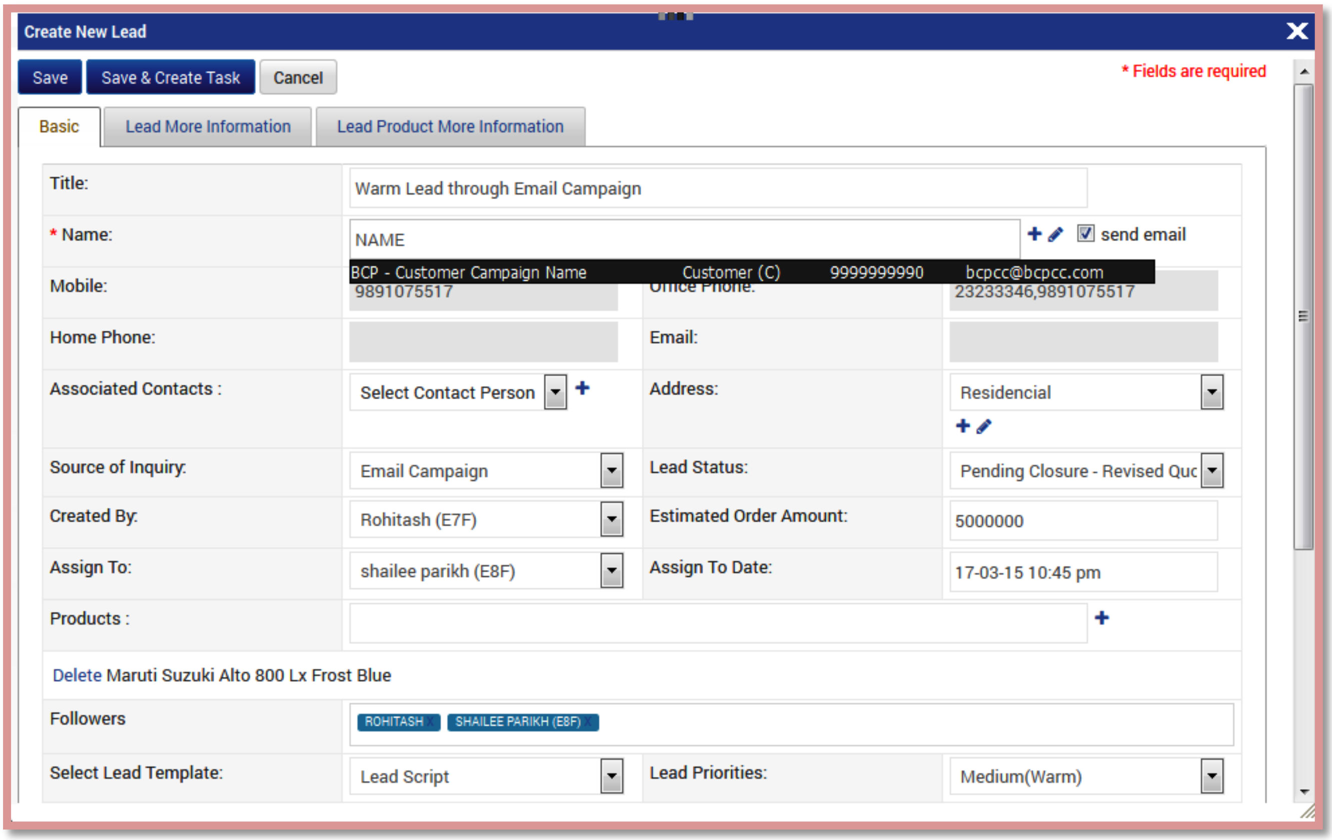


- Raw Contact / Suspect / Prospect is your raw data with basic information available on it to be further called upon and determined if the Raw Contact is a Qualified Lead or not.
- This raw contact will be further converted to a lead and further into a contact upon the Lead being won.
- Raw Contact as 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**



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.



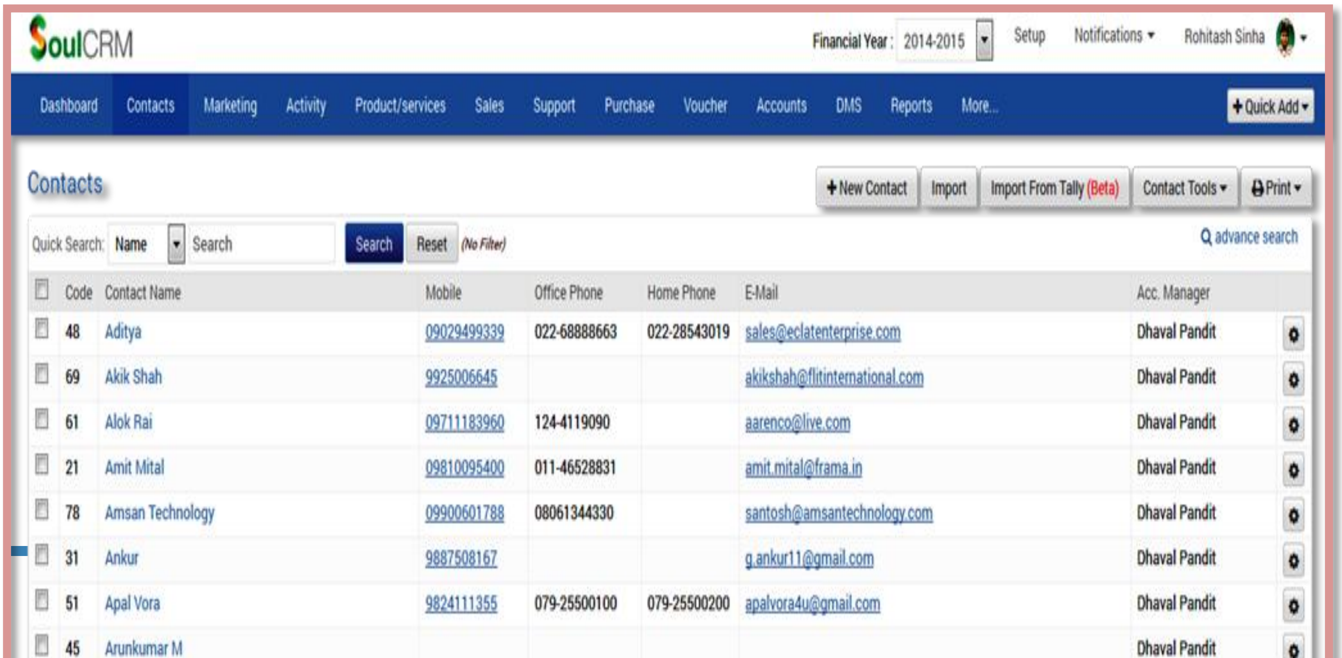
- In the Lead More Information Tab add relevant data as defined using Custom fields for leads.

- 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.

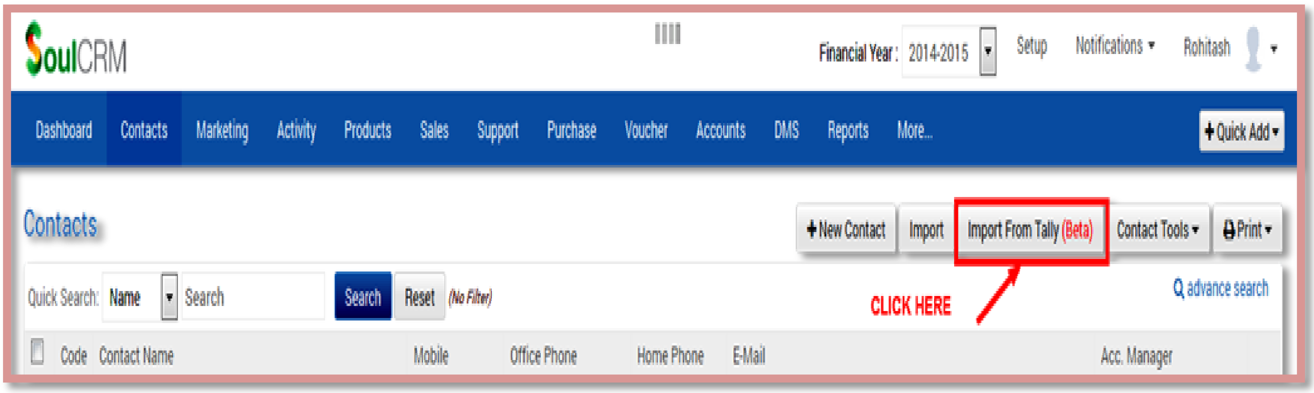


Contacts can be created using the **+Add New** contact button.

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

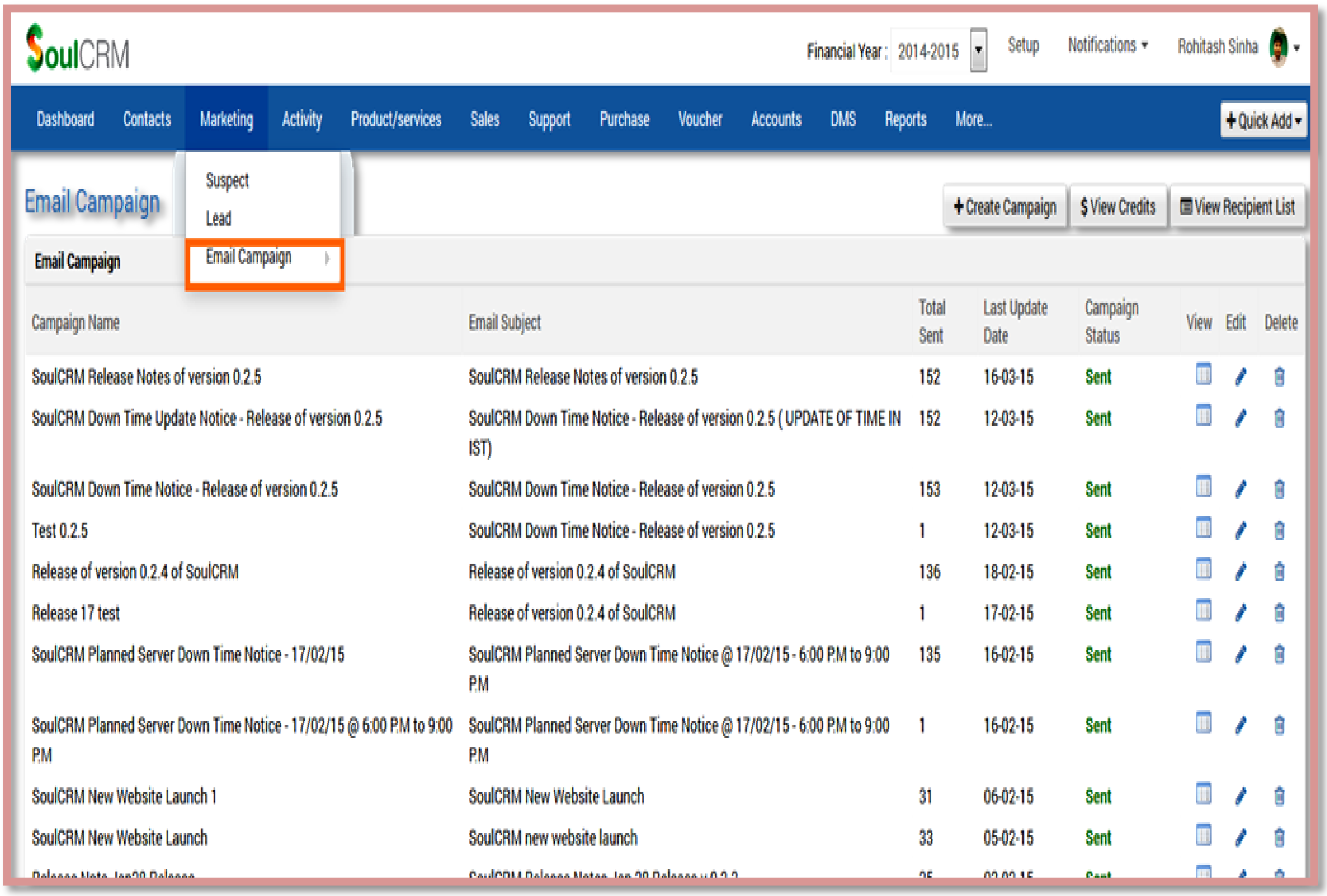
- Click add Contact
- Select Title of type individual viz. Mr., Miss, Mrs., etc
- Uncheck Create Ledger
- Enter details of the individual viz. Mobile no, E-mail, etc
- Enter Company Name > If exists select the Company
- If Company does not exist, Click Add New Company
- Enter details of Company & Click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

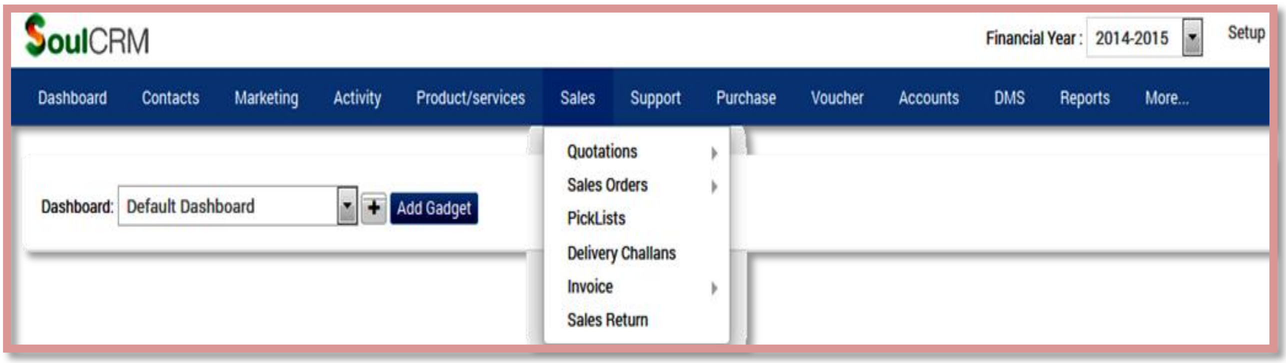
To start configuring your first Email Campaign click here.



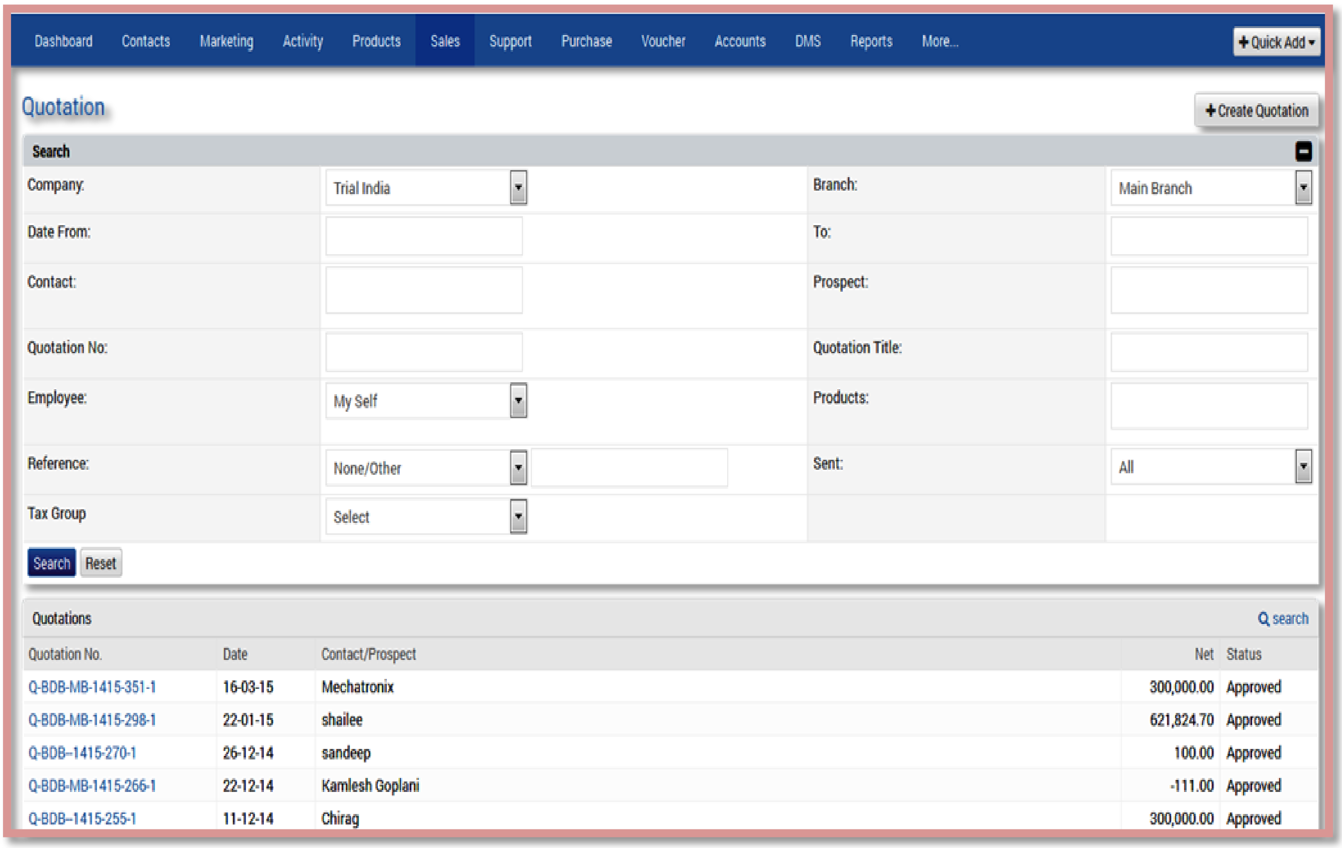
Sales Flow

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.



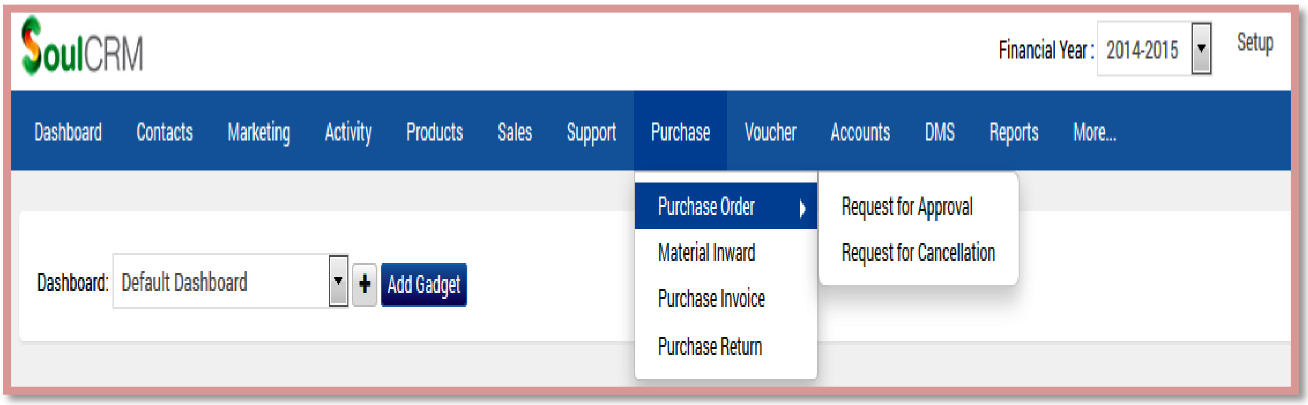
- Each of these documents involves Selecting the Contact, Adding the Date, Applicable tax Group, References, Product Details, Statutory Details, Shipping, Terms & Conditions, Cover Pages and Annexure.
- These documents cover up the details of the document being created and each detail viz. T&Cs, Cover 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.



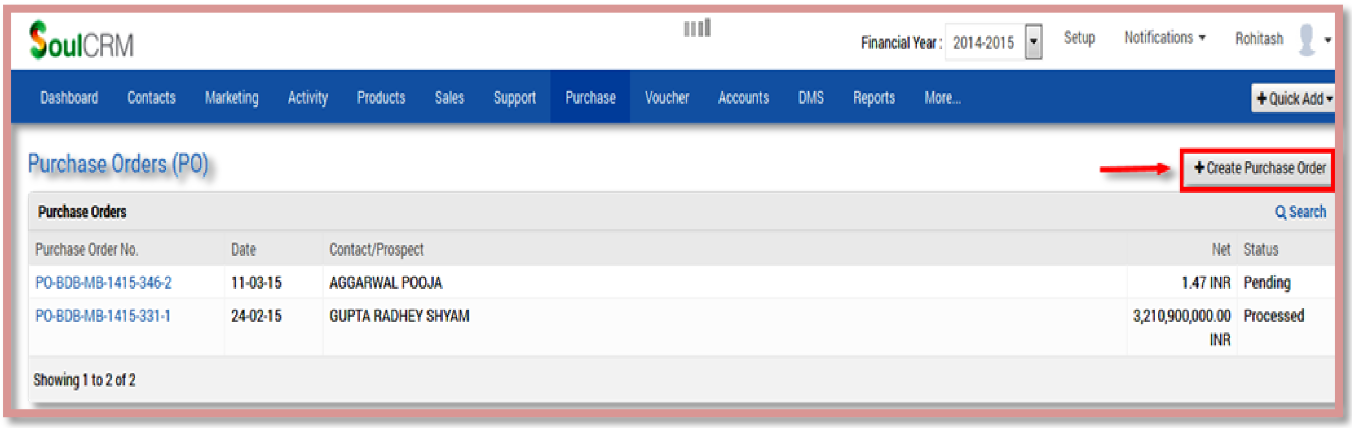
Purchase Flow

Purchase involves creating

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



- 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.

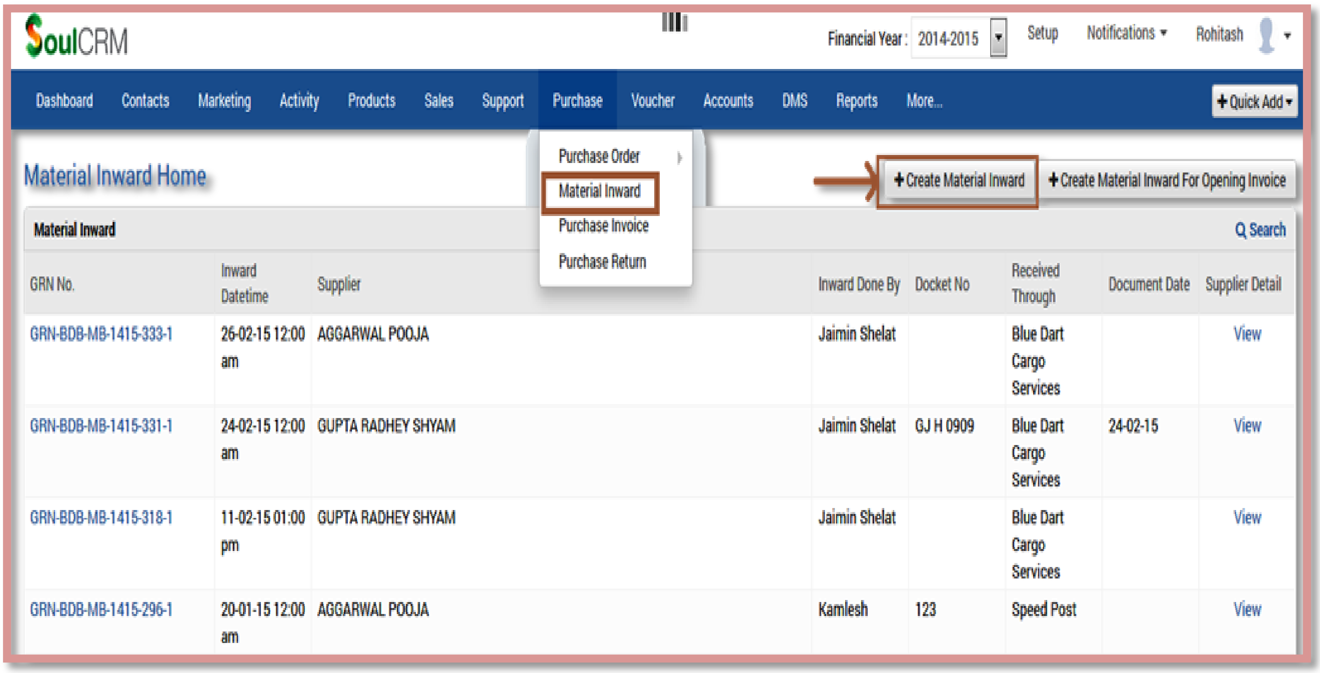


➢ **To create a PO,** Go to Purchase, Click Purchase Order,

- 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.

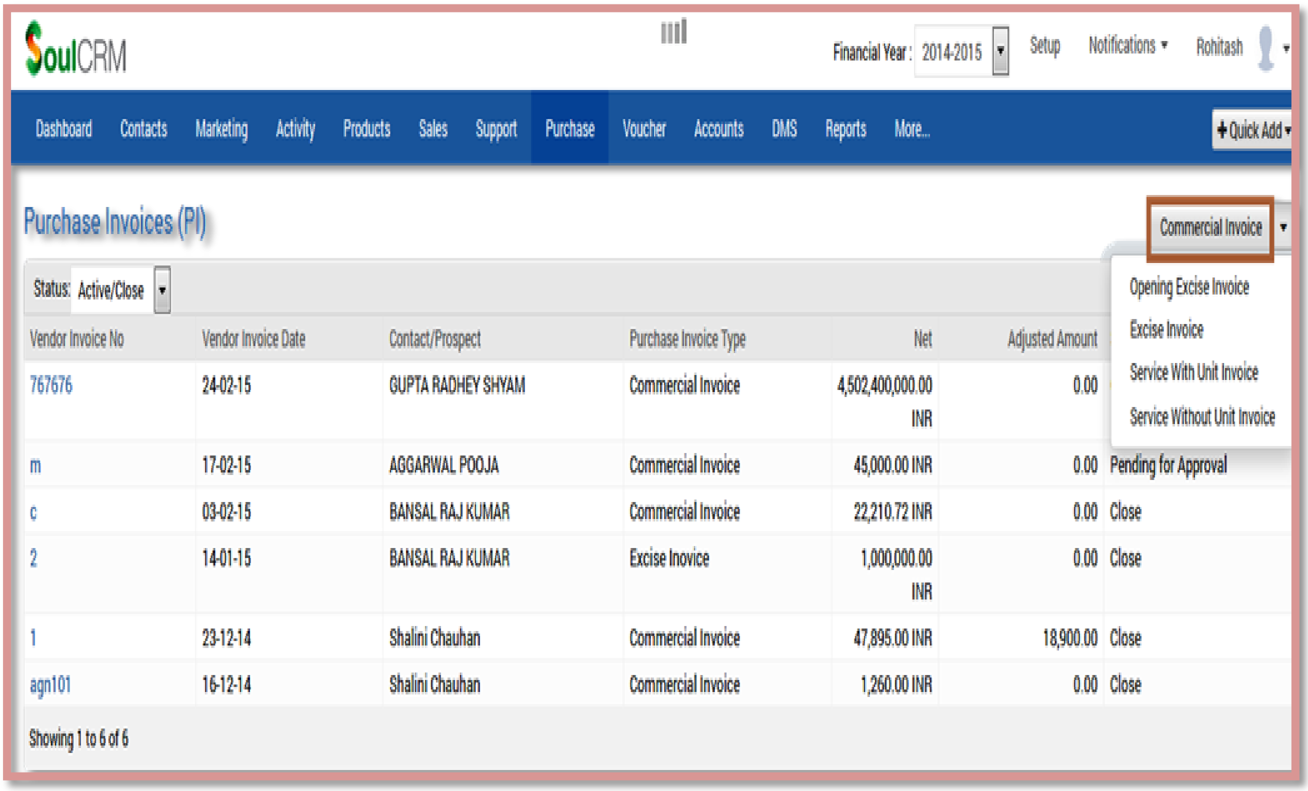
➢ **To Create Material Inward,** Go to Purchase > Material Inward

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



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

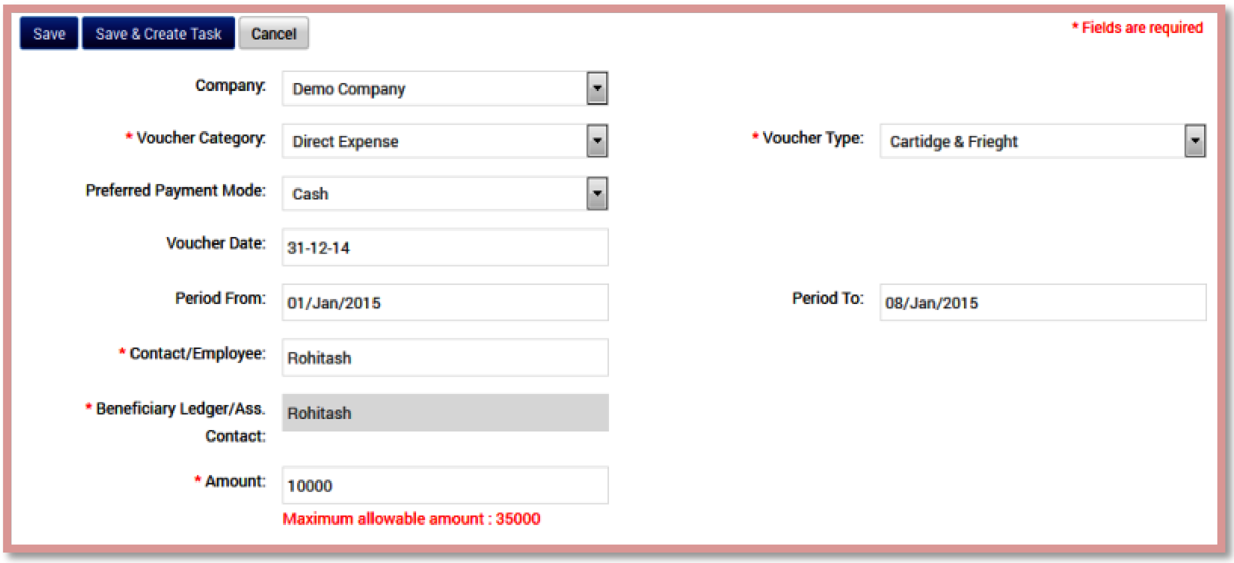
- Enter basic details, product details and terms
- Select the GRN (Goods Receipt Note) against which the goods have been received and the invoice is to be adjusted
- Multiple GRN can be selected to create a single invoice
- The Purchase Invoice can be further locked to avoid editing
- Until un locked 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



Vouchers

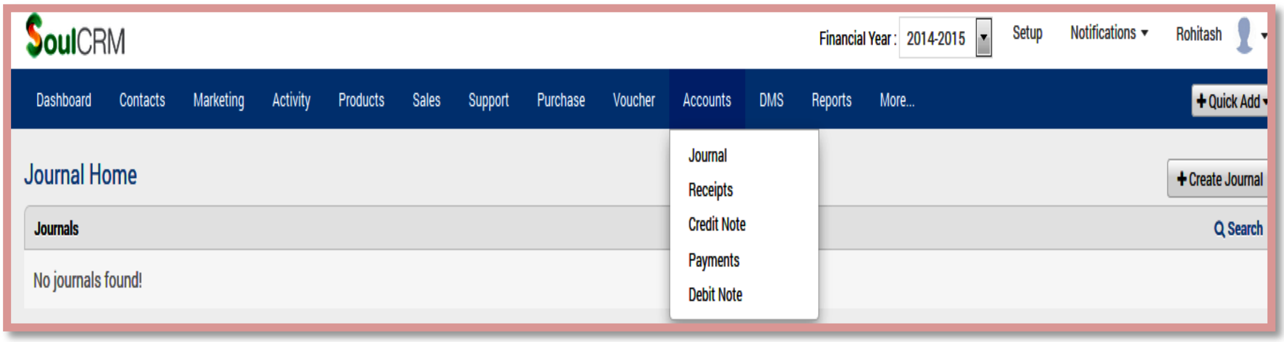
Apart from the regular Sales and Purchase another facility of creating vouchers for various expenses done in the organization can be taken care of through SoulCRM.

- 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.



Accounts

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



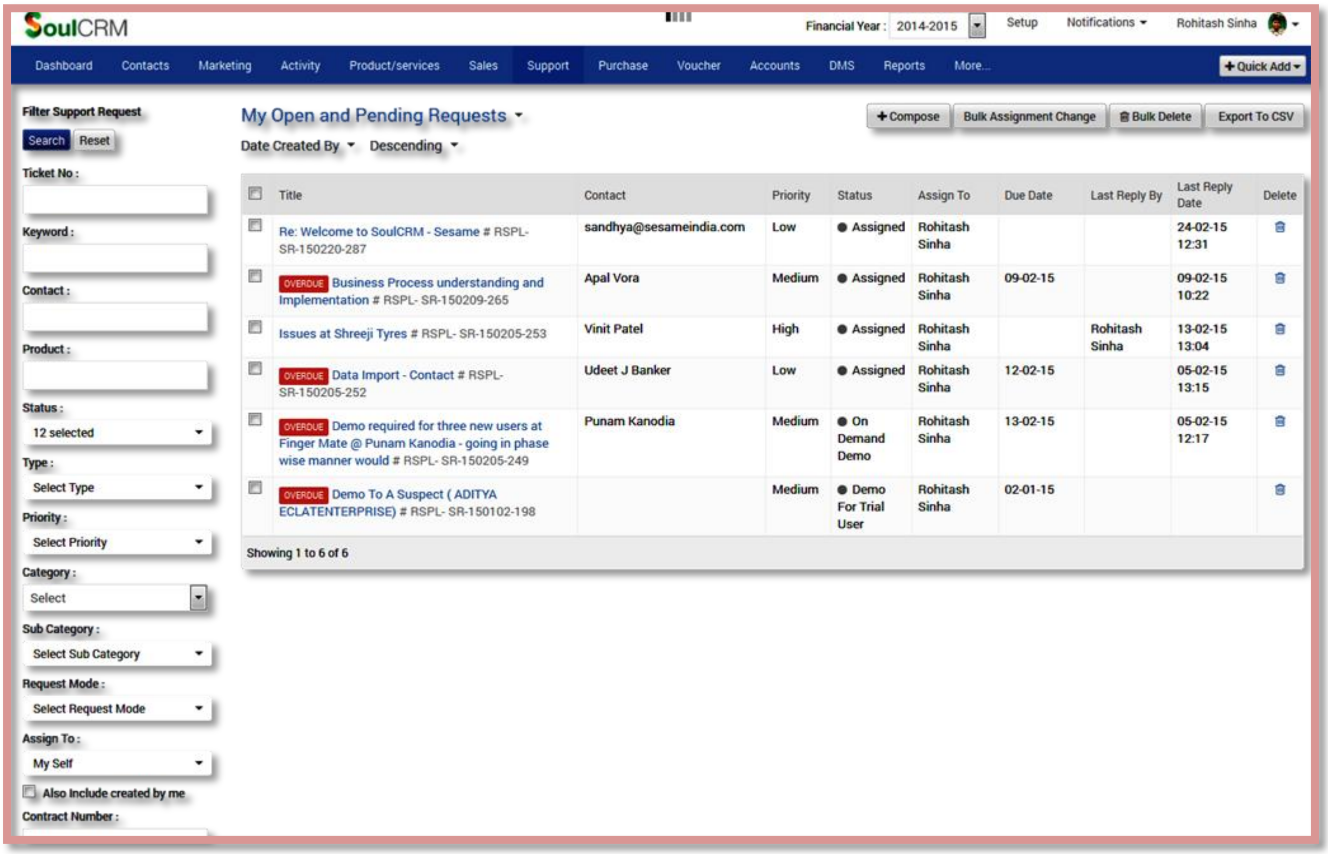
- Journal entries
- Receipts
- Credit Note
- Payments
- Debit Notes

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.

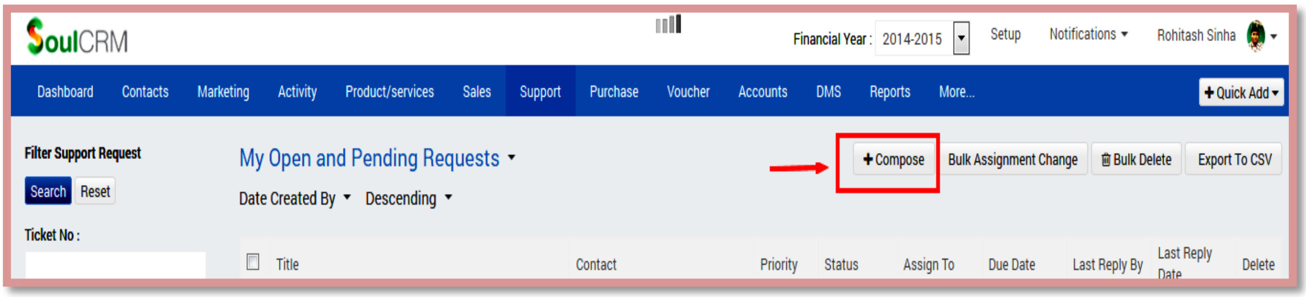
Support

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.

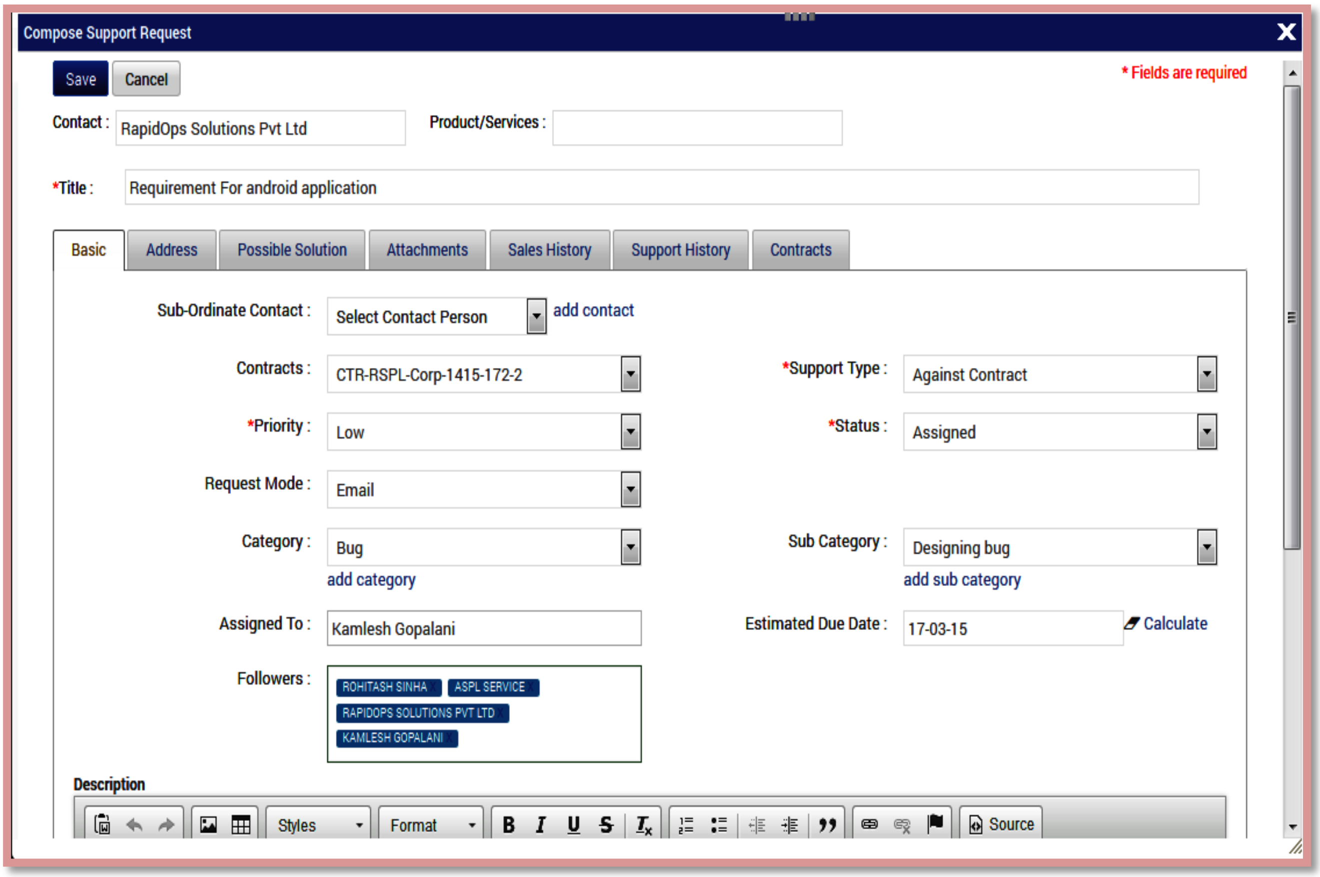


- Support requests can be created around the contact or the product and further follow-ups done on the Support request.

- 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.



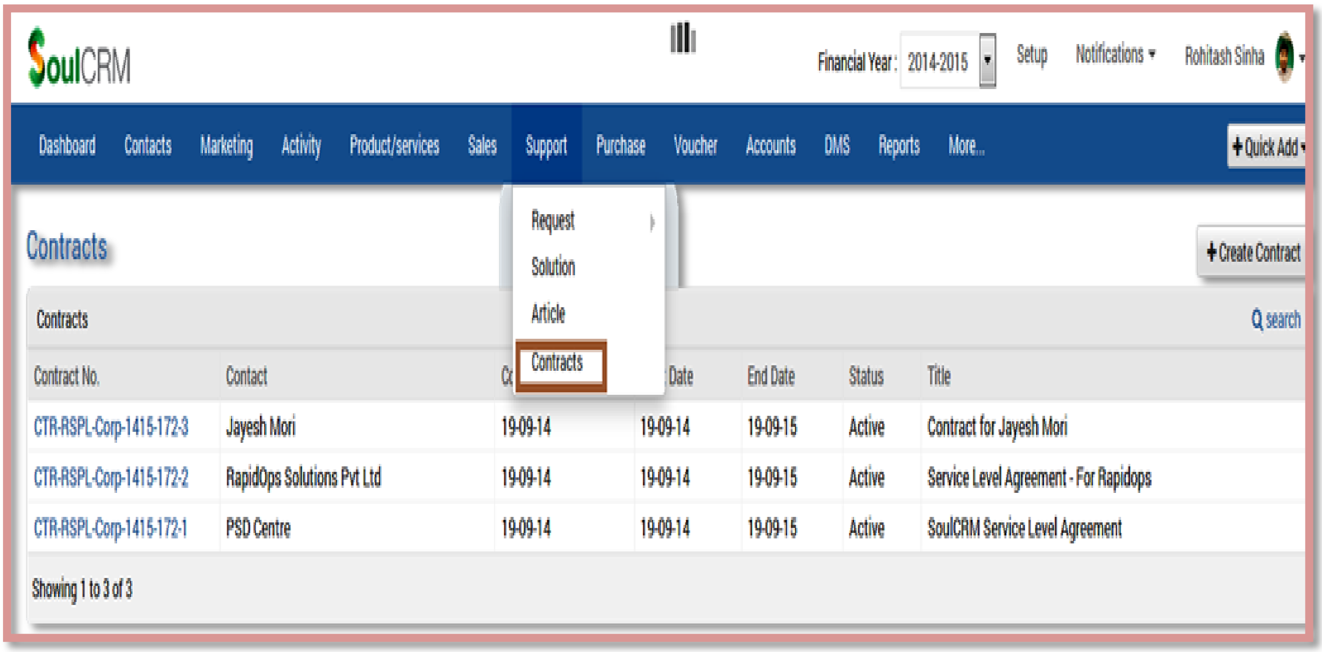
- **Compose Screen**



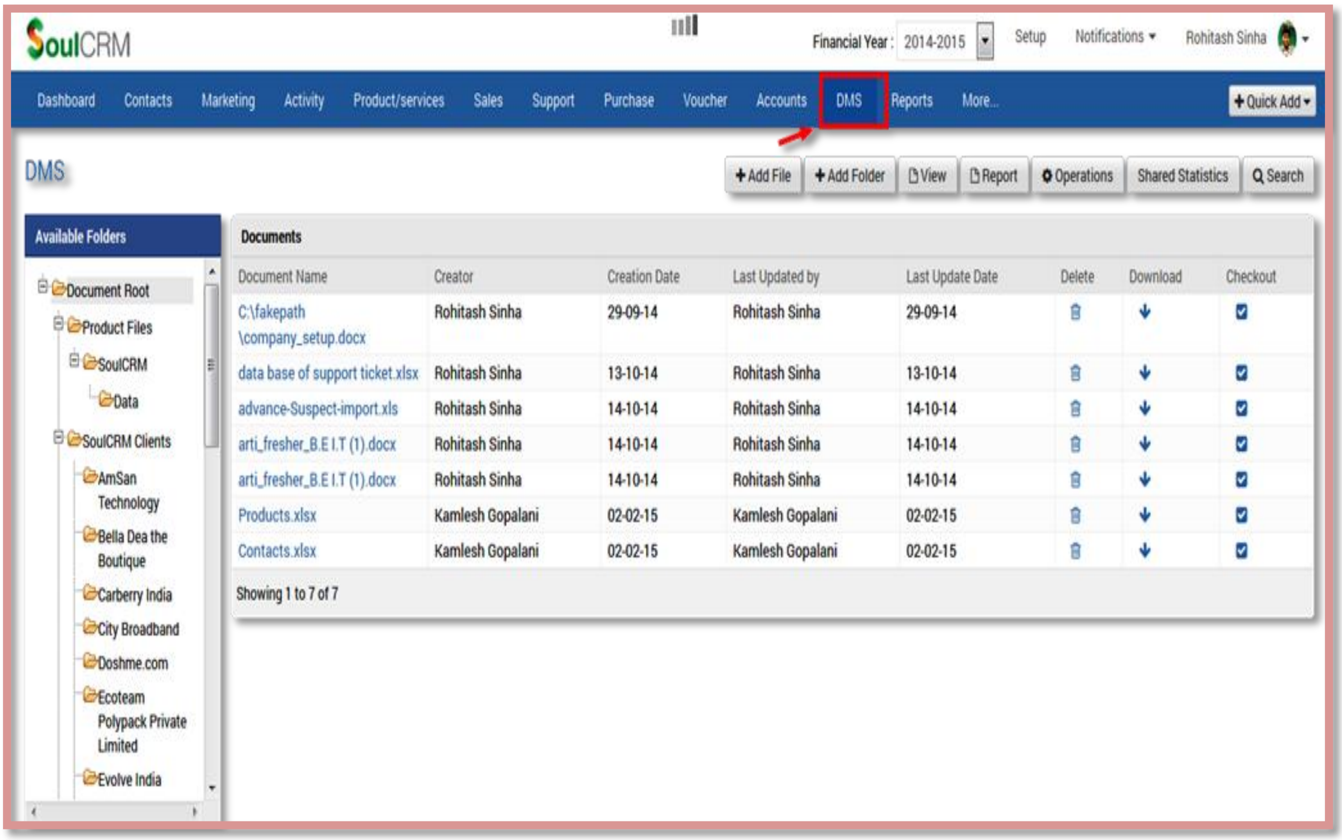
Contracts

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*

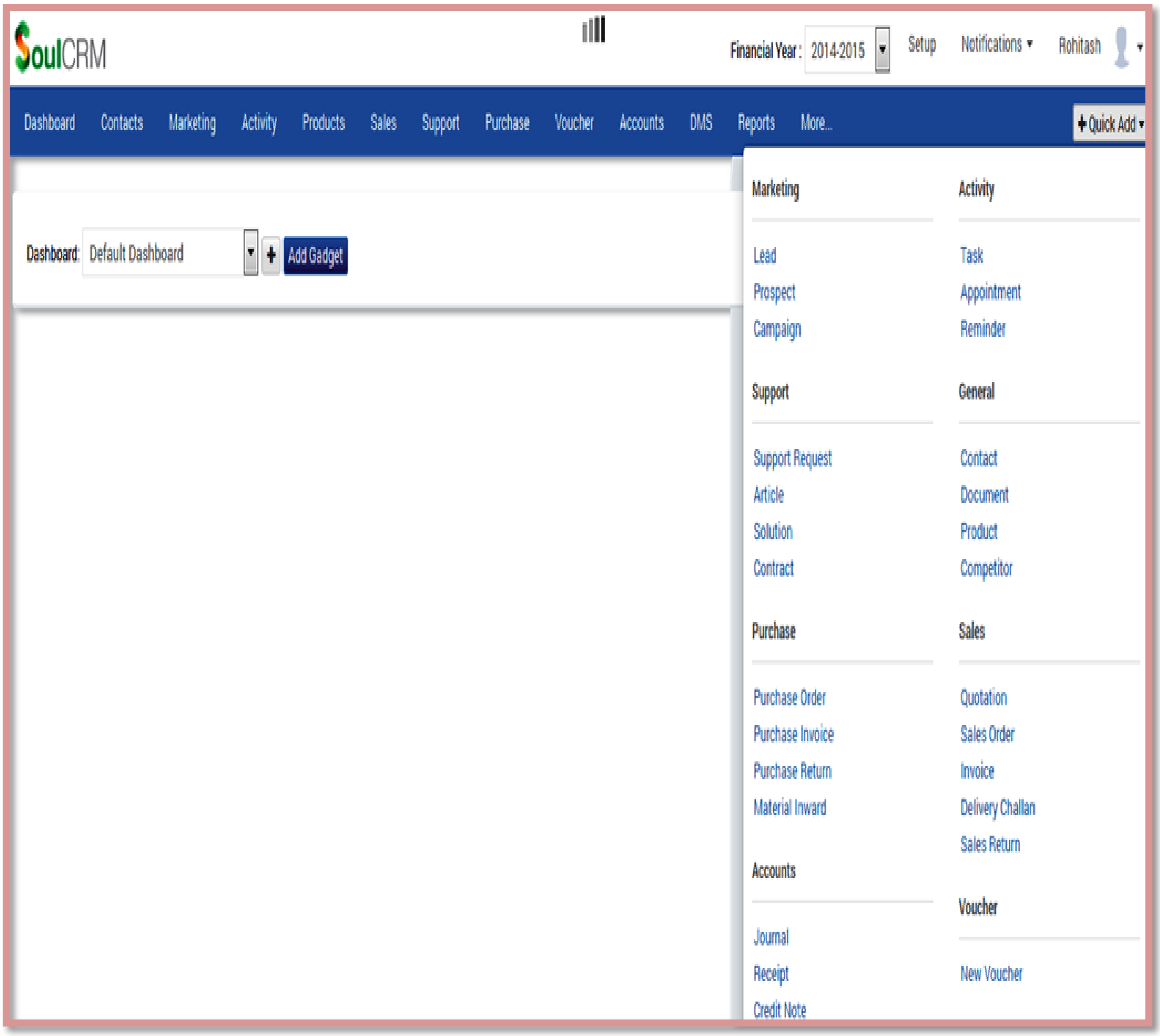
- Account Payable , Receivable and Party Ledger Report
- Payment Register Report
- Invoice Analytics
- Lead , Quotation and Sales Order Analytics
- Contact Summary Report
- Inventory Stock Movement/Traceability
- Stock Summary Branch Wise , Product Wise
- Stock Valuation
- Lead Industry Wise Report
- 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

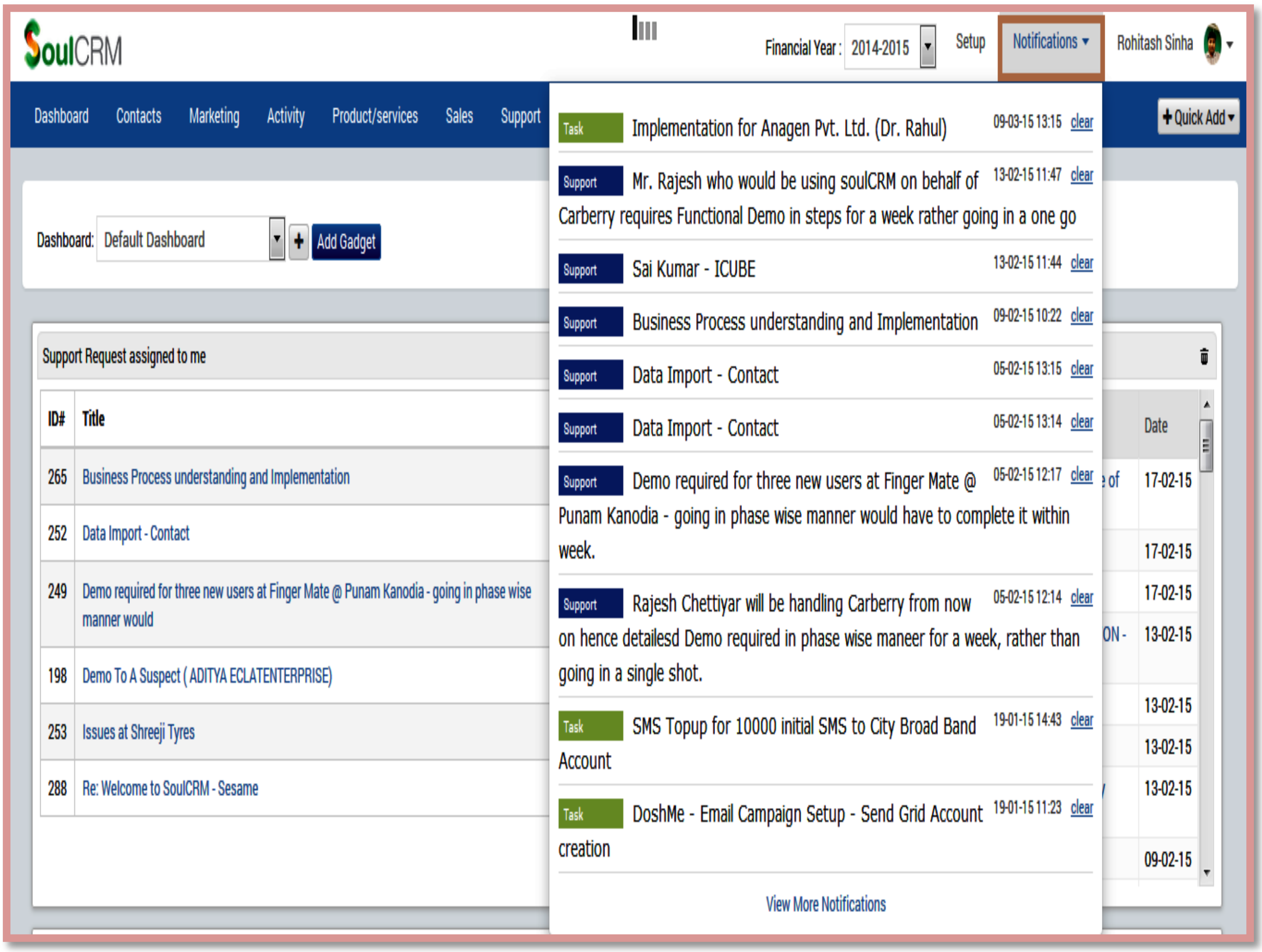
The Quick Add Button is available throughout the software in the top right corner of the module bar.

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.



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.