

ChuksCRM

USER GUIDE



GETTING STARTED

INTRODUCTION TO CHUKS CRM

What Is ChuksCRM ?

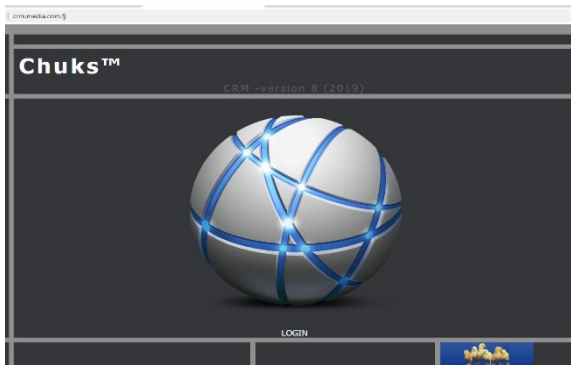
ChuksCRM is a customer management system, if you are in need of accurate account management for sales related tasks. ChuksCRM helps you manage all your customer relations effectively, managing sales leads, monitoring staff workload, tracking deliverables, targeting sales quotas, archiving old quotes and staying in touch and deliver a seamless customer experience.

With ChuksCRM, you also get the flexibility to manage Multi-Company with Multi Outlets, hosted on local LAN or use a cloud-hosted service. ChuksCRM are packed with enterprise-grade storage, unlimited customization, and customer support, hosting package depends on the number of customers you need to involve.

You can perform and automate many business tasks with CRM including:

- Keep and use all your customer information from one place.
- Schedule and track activities.
- Analyze data using charts.
- Generate reports.
- Track quotes, orders, and invoices.
- Track your sales target.

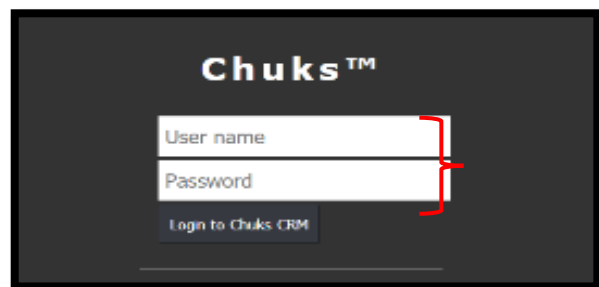
HOW TO START?



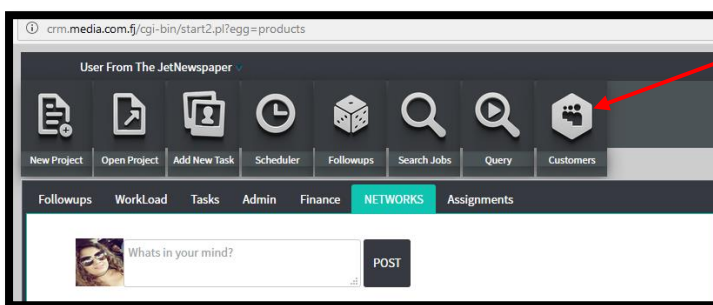
- Enter URL (example: crm.guestuser.com)

HOW TO LOGIN?

- Enter your username and password.
- Click on "Login to Chuks CRM".



HOW TO ADD NEW CUSTOMER?



1. Click on Customer

2. Click on Add New Record

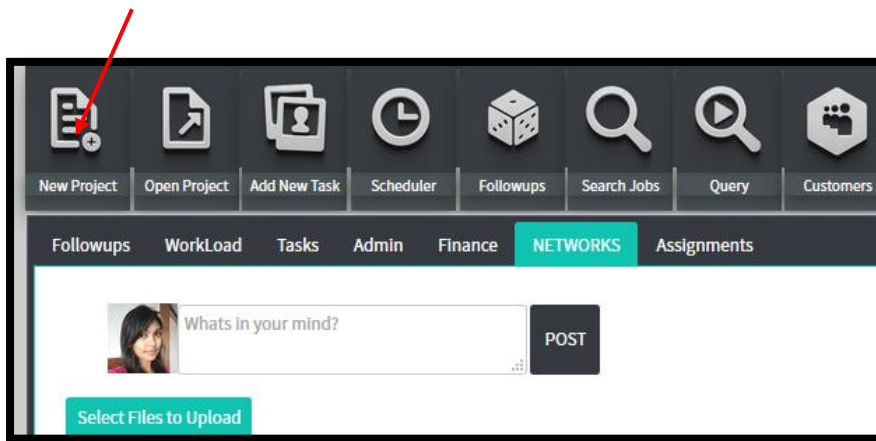
	Company Name	Contact Person	Phone Contact
3231	Air Terminal Services (Fiji) Limited	6722777	
578	GRN CONSULTING SERVICES PTY LTD	Govind R Nair	
1209	100 Sands Fiji Ltd	Lee Kearney	
1038	Sive Star Fishing Charters	Graham	9983570
2331	BKnots	Vinhal	
1600	A Design	Alli	
1724	A Jell & Sons	Abrail Harrison	9 779344

3. Enter the required details

	Company Name	Contact Person	Phone Contact	email	Tin Number	
3231	Air Terminal Services (Fiji) Limited	6722777		Elenor.Labekaucoro@ats.com.fj	0	Delete
578	GRN CONSULTING SERVICES PTY LTD	Govind R Nair		gnair@grnconsulting.com.au		Delete
1209	100 Sands Fiji Ltd	Lee Kearney		Lee@OneHundredSands.com		Delete

ADDING NEW PROJECT/QUOTE

Click on the New Project button



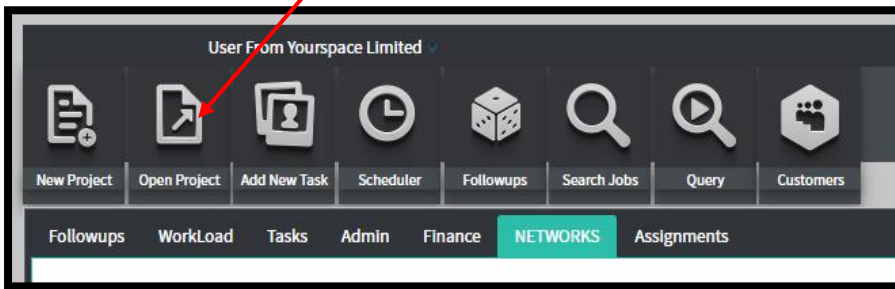
ADD NEW JOB HERE

Please Provide details to add new job for Media Partners Limited

1. QUOTATION FOR? ... Quote For What?
2. DEPARTMENT OR PROJECT TYPE -select--type-
3. COMPANY NAME
4. AddNew Job for Media Partners Limited

OPENING EXSITING JOBS

By clicking on the “Open Project” button, it allows you to search for all existing jobs, quotations and invoices.

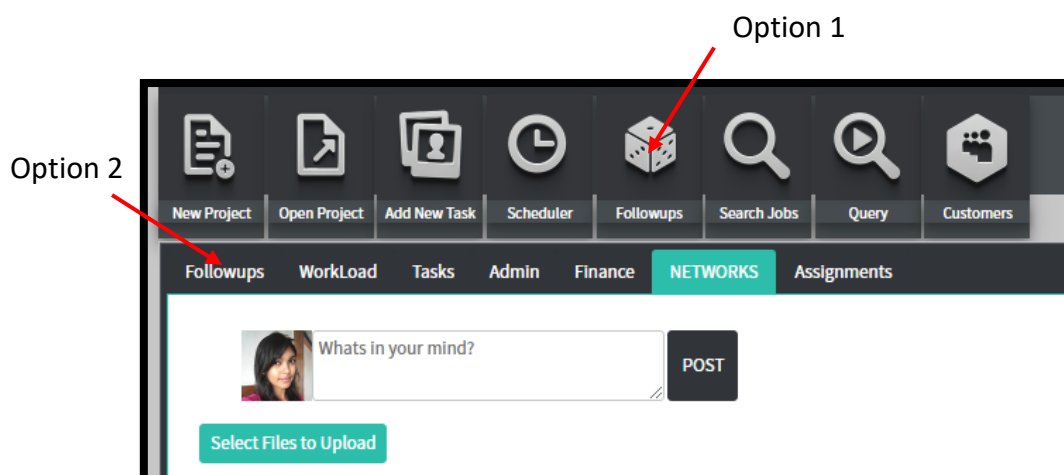


Enter the Job Number and click search



WORK FOLLOWUPS

Keeping track of all jobs that are being done by the company are now easy and simple just by clicking on the Follow-up Tab.



By clicking on View, it will open up a tab where you can enter the details about a particular job. It shows which jobs are assigned and the amount of time each person takes to complete the task.

Followups	WorkLoad	Tasks	Admin	Finance	NETWORKS	Assignments
FollowupList						
Showing 1st Followup List						
JN:17656	Rams Cleaning services Ltd	Billboard Lease Owned by	currently billed	9 days ago		VIEW
JN:17655	Port Denarau Marina	billboard advertisement Owned by	currently billed	9 days ago		VIEW
JN:17652	McDonalds - Headoffice	billboard advertisement Owned by	currently billed	9 days ago		VIEW
JN:17642	Fiji Airways	LED Display Screen Owned by swastika	currently requested	9 days ago		VIEW
JN:17588	Radisson Blu Resort Fiji Denarau Island	Billboard Owned by swastika	currently requested	17 days ago		VIEW

Company: **Your Space** Type: printing
 Contact Person: Sam Status: billed
 PH: 9966115 Sam@media.com.fj

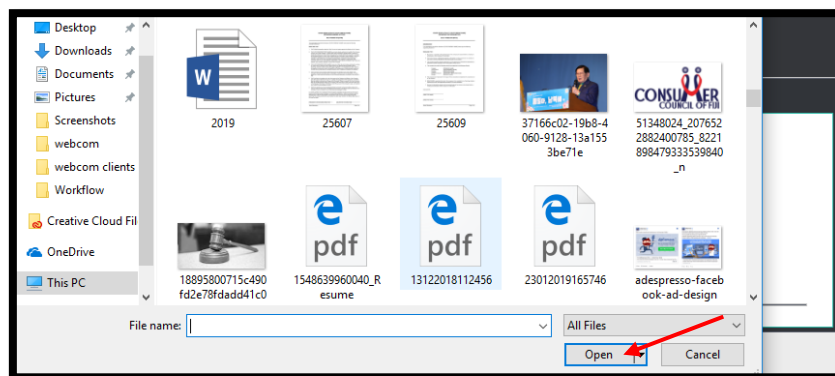
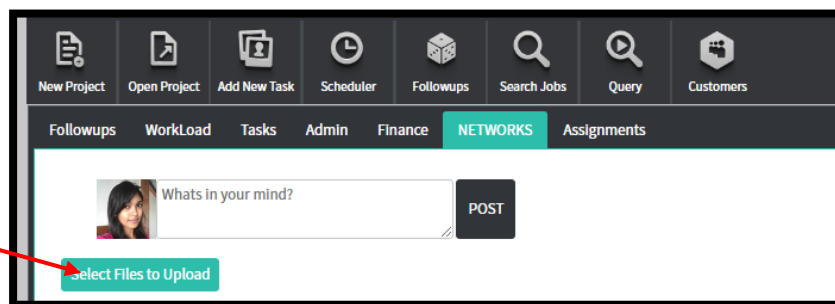
Header Quote Items PO Number **Followups** All Job Sheets Requested Confirmed

Your printing is:
newspaper advertisement

New Follow Up [Update Followup Link](#)

Uploading a File

Users can upload different type of files on CRM, making it easy for others to access the file from different places. Click on the button and browse through files to upload.



ADDING NEW TASK

This button allows you to assign new tasks to people.

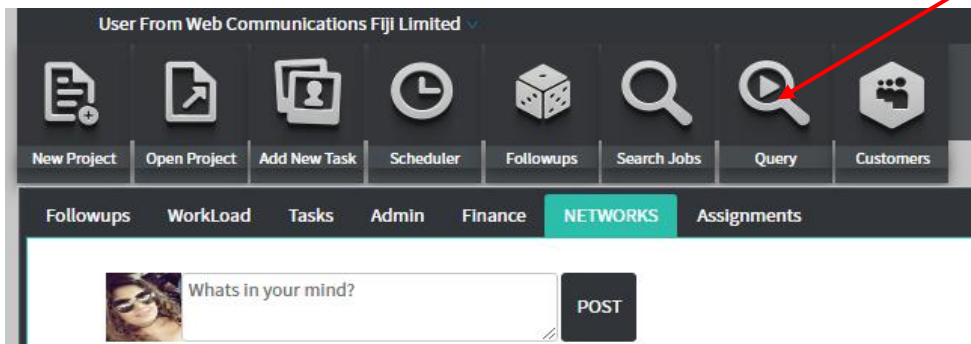
1. Enter the task details

The screenshot shows a web interface for adding a new task. The form is titled 'ADD NEW TASK HERE' and contains several input fields and buttons. Red arrows point to specific elements with numbered annotations:

- 1. Enter the task details**: Points to the 'ENTR' and 'TYPE' dropdown menus at the top of the form.
- 2. Enter Details**: Points to a large text input field labeled 'TASK DETAILS?'.
- 2. Select user**: Points to a dropdown menu labeled 'ASSIGNMENT FOR SELECT USER'.
- 3. select relevant company**: Points to a dropdown menu labeled 'RELEVANT COMPANY NAME'.
- 4. Click on Add New**: Points to a dark button at the bottom of the form labeled 'AddNew Task for Web Communications Fiji Limited Team'.

QUERY

Allows its users to search for jobs that the company has quoted, billed, confirmed and etc.



1. Select dates



Report Maker

SELECT CUSTOM DATES:

Report Start Date

Report End Date

DISPLAY REPORT

3.

2.

Quoted Jobs	1 day
Confirmed Jobs	2 days
Designed Jobs	3 days
TO BE DESIGNED	5 days
Completed Jobs	10 days
NEED ATTENTION	14 days
TO BE BILLED	20 days
Billed Jobs	30 days
TO BE COLLECTED	60 days
Paid Jobs	90 days