

# FREELANCER CRM Guide



<https://crmdata.eu>

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# Step 1: Get a Demo

- Visit <https://crmdata.eu>
- Click “Request a 10 Days Demo” in the Freelancer section.



## MANAGE

- ✓ Appointments Schedule
- ✓ Offers to Customers
- ✓ Products Inventory
- ✓ Sales & Payments

Request a 10 Days Demo!

# Step 1: Get a Demo

- Fill the form at <https://crmdata.eu/free-lancer?page=demo>
- Once Approved, you will receive an email with the link for the software demo.

**REQUEST A DEMO**

Company \* Company name \*

Your name \* Your name \*

Email \* Email \*

Company location \* Location \*

Contact Number \* Contact Number \*

Captcha 7HZSUBJQ

Re enter Captcha \* Enter captcha from above field

Send

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# Step 2: Customize CRM

## Setup the demo

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Greek

Appointments Customers▼ Offers Payments Products▼ Sales Users My Profile

Welcome admin test

No Appointments added yet. [Add Here](#)

No Customers added yet. [Add Here](#)

No Customers Status added yet. [Add Here](#)

No Offers added yet. [Add Here](#)

No Payment Methods added yet. [Add Here](#)

No Products added yet. [Add Here](#)

No Products Category added yet. [Add Here](#)

No Sales added yet. [Add Here](#)



# Step 2: Customize CRM

## 2.1 CUSTOMER MANAGEMENT

Manage your customers, create , edit or delete .

Adding customer first is a requirement in order to book an appointment, add a sale.



### Customers Management

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**Add Customers Status first**

**Add Customers**

**Firstname** firstname \*

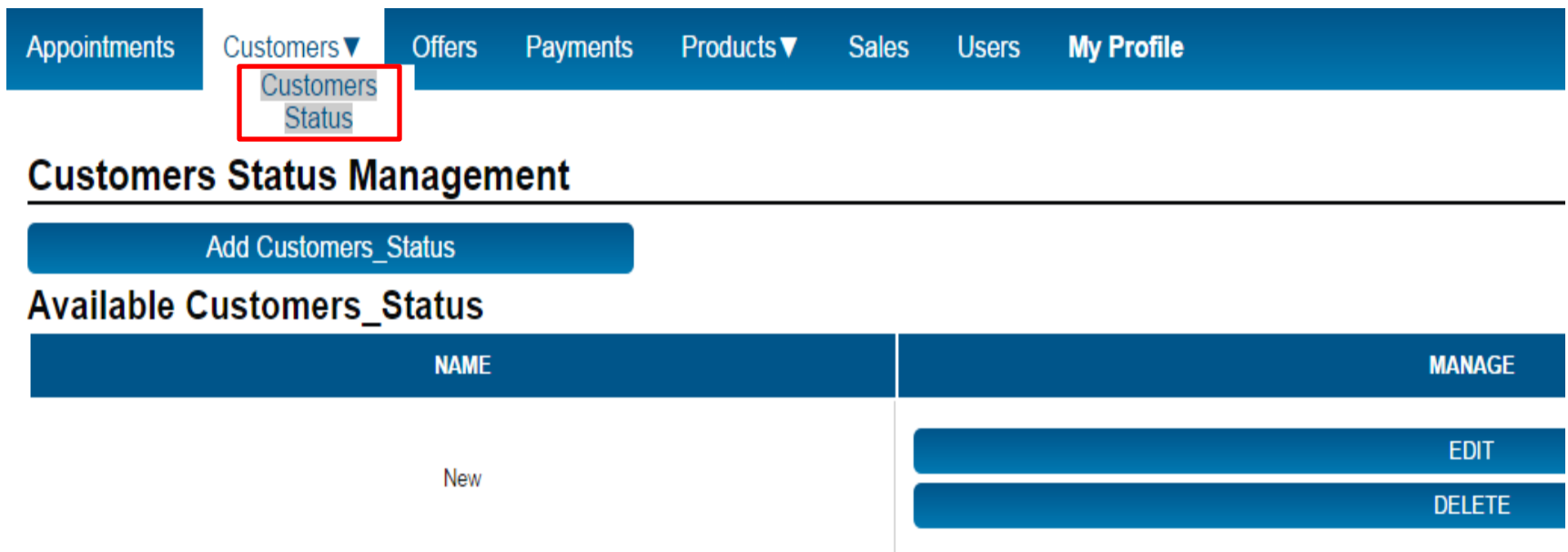
**Lastname** lastname

**Telephone** telephone

# Step 2: Customize CRM

## 2.1.1 CUSTOMERS STATUS (optional)

Add customers status eg. Pending, New, Existing, according to your needs. It will be very helpful on a later stage in reporting for your business.



The screenshot shows a CRM interface with a navigation bar at the top. The 'Customers' menu item is expanded, and 'Customers Status' is highlighted with a red box. Below the navigation bar, the 'Customers Status Management' section is visible. It includes a button to 'Add Customers\_Status' and a table of 'Available Customers\_Status'. The table has two columns: 'NAME' and 'MANAGE'. The 'NAME' column contains the value 'New'. The 'MANAGE' column contains two buttons: 'EDIT' and 'DELETE'.

NAME	MANAGE
New	<a href="#">EDIT</a> <a href="#">DELETE</a>

# Step 2: Customize CRM

## 2.2 PRODUCTS MANAGEMENT

Create an Inventory for the Products of your Business. A product can be:

- 2.2.1 Service
- 2.2.2 Actual Product



### Products Management

---

Add Products\_Category

**Add Products**

Name \*

Type \*  ▼

Category \*  ▼



# Step 2: Customize CRM

## 2.2.1 SERVICE

Manage your product items, create , edit or delete items by selecting **type as service** including price (at least 1 required for any sales).



### Products Management

Add Products\_Category

**Add Products**

Name \* GFGFG

Type \* Service

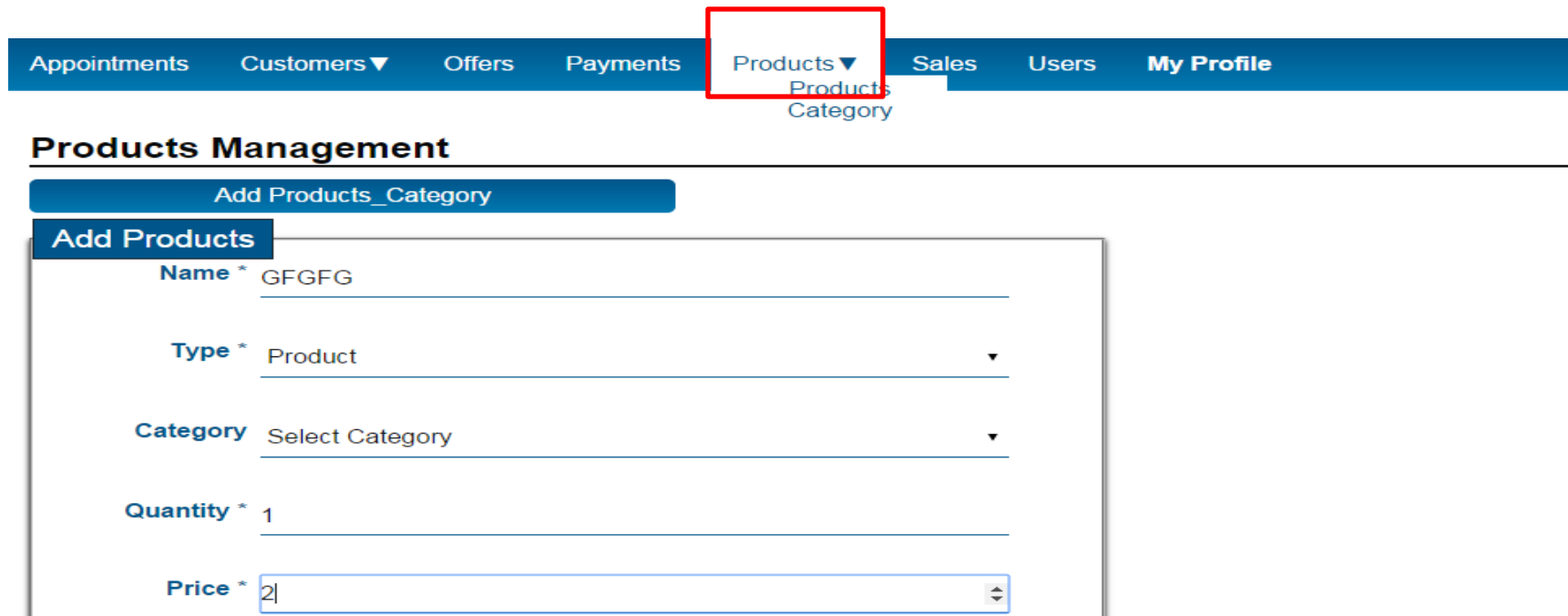
Price \* 2

Save

# Step 2: Customize CRM

## 2.2.2 ACTUAL PRODUCT

Manage your product items, create , edit or delete items by selecting **type as product** including price, quantity (at least 1 required). **Product Category is optional.**



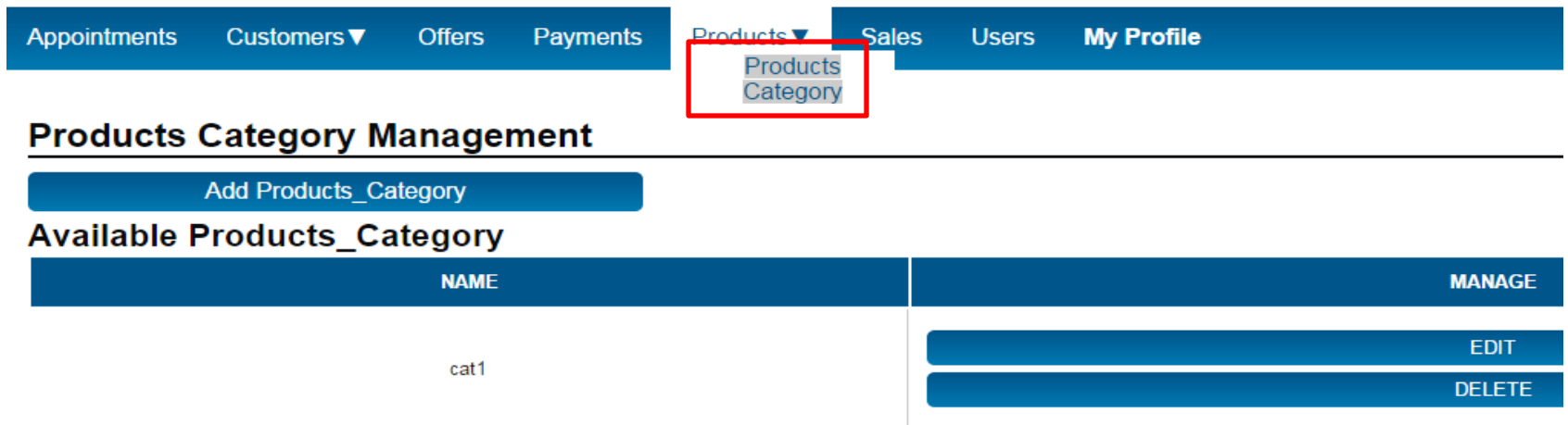
The screenshot displays the CRM interface. At the top, a blue navigation bar contains the following items: Appointments, Customers ▼, Offers, Payments, Products ▼ (highlighted with a red box), Sales, Users, and My Profile. Below the navigation bar, the 'Products Management' section is visible. A blue button labeled 'Add Products\_Category' is present. Below this, a form titled 'Add Products' contains the following fields:

- Name \***: GFGFG
- Type \***: Product (dropdown menu)
- Category**: Select Category (dropdown menu)
- Quantity \***: 1
- Price \***: 2

# Step 2: Customize CRM

## 2.2.2.1 PRODUCT CATEGORY (optional)

Manage your product categories, create , edit or delete. Important if you have different types of products.



The screenshot shows a CRM dashboard with a navigation bar at the top. The navigation bar includes links for Appointments, Customers (with a dropdown arrow), Offers, Payments, Products (with a dropdown arrow), Sales, Users, and My Profile. The 'Products' dropdown menu is open, and 'Products Category' is highlighted with a red box. Below the navigation bar, the page title is 'Products Category Management'. There is a blue button labeled 'Add Products\_Category'. Below that, the section is titled 'Available Products\_Category'. A table displays the available categories. The table has two columns: 'NAME' and 'MANAGE'. The 'NAME' column contains the value 'cat1'. The 'MANAGE' column contains three buttons: 'EDIT' and 'DELETE'.

NAME	MANAGE
cat1	<a href="#">EDIT</a> <a href="#">DELETE</a>

# Step 2: Customize CRM

## 2.3 APPOINTMENTS

Manage your appointments of your business by adding, editing, deleting.

Having already added, **products** or **services** and **customers** is a prerequisite.

Appointments

Customers▼

Offers

Payments

Products▼

Sales

Users

My Profile

### Appointments Management

#### Add Appointments

Services \* Select Services ▼

Customer \* Select Customer ▼

When \* ηη/μμ/εεεε

From(hour)\* from (hour)

From(minutes)\* from (minutes)

# Step 2: Customize CRM

## 2.3.1 CALENDAR – SALESMEN AVAILABILITY

Check your appointments calendar and salesmen availability for booking any new appointments ([SALESMEN AVAILABILITY search form in APPOINTMENTS page](#)).

**Salesmen Availability**

When ηη/μμ/εεεε

Σεπτέμβριος 2015

Δευ	Τρι	Τετ	Πεμ	Παρ	Σαβ	Κυρ
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4

**TIME**

8:00

9:00

10:00

11:00

12:00

13:00

14:00

15:00

georger

testcustomer 10:00:00 - 12:00:00

testcustomer 10:00:00 - 12:00:00

# Step 2: Customize CRM

## 2.4 SALES

Manage the sales of your business by adding, editing, deleting.

Having already added **products** or **services** and **customers** is a prerequisite.



### Sales Management

**Add Payment Methods first**

**Add Sales**

**Customer \*** Select Customer ▼

**What is offered \*** Select ▼

**Salesdate \*** ηη/μμ/εεεε

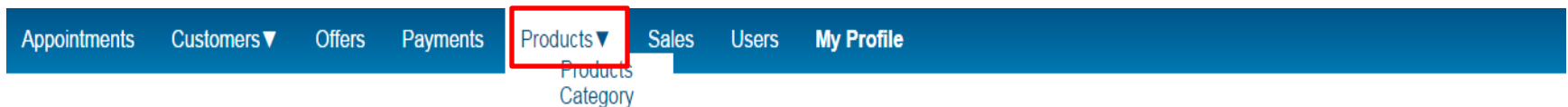
**Paid \*** paid

**Salesman \*** Select Salesman ▼

# Step 2: Customize CRM

## 2.4.1 SALES vs PRODUCT INVENTORY

When a Sale is added, your Products' Inventory will be automatically updated in the PRODUCTS' page. (This is related only to products and not services).



### Products Management

**Add Products**

**Add Products\_Category**

Category

**SEARCH**

### Available Products

NAME	TYPE	CATEGORY	QUANTITY	PRICE PER ITEM	Products AVAILABILITY	MANAGE
kapaki	product	cat1	5	10	2	<b>EDIT</b> <b>DELETE</b>

# Step 2: Customize CRM

## 2.5 OFFERS

Manage offers to your customers and keep a record by adding, editing, deleting.

Having already added **products** or **services** and **customers** is a prerequisite.



### Offers Management

---

**Add Payment Methods first**

**Add Offers**

<b>Title *</b>	title	
<b>Customer *</b>	Select Customer	▼
<b>What is offered *</b>	Select	▼
<b>Amount *</b>	amount	
<b>Salesman *</b>	Select Salesman	▼



# Step 2: Customize CRM

## 2.6 USERS (optional)

Add Users who will be using the platform, **either admins or salesmen.**

Appointments Customers▼ Offers Payments Products▼ Sales **Users** My Profile

### Users Management

Add Users

#### Users

NAME	TELEPHONE	EMAIL	ADDRESS	ROLE
test	9999999999	test@mail.com		admin

# Step 2: Customize CRM

## 2.7 PAYMENT METHODS(optional)

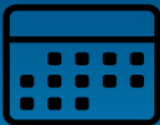
Add payment methods eg. Cash, Credit according to your needs. It will be very helpful on a later stage in reporting for your business (home page main tabs).

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Greek

Welcome admin test

No Payment Methods added yet. [Add Here](#)



Appointments



Customers



Customers Status



Offers



Payment Methods



Payments



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Logout

# Step 3: Additional Features

## 3.1 Payments

Monitor your Payments by Service (kitesurf, windsurf etc.) or by Customer.

You can search by date, month (**PAYMENTS TAB**).

## 3.2 Profile

Customize your profile, by changing any details like username, password, etc

**(PROFILE TAB)**.