



**Sales**  
Streamline and  
automate your  
sales processes

**Marketing**  
Transform customer  
information into  
actionable knowledge

**Service**  
Boost service  
effectiveness

# Getting started with Xlink CRM

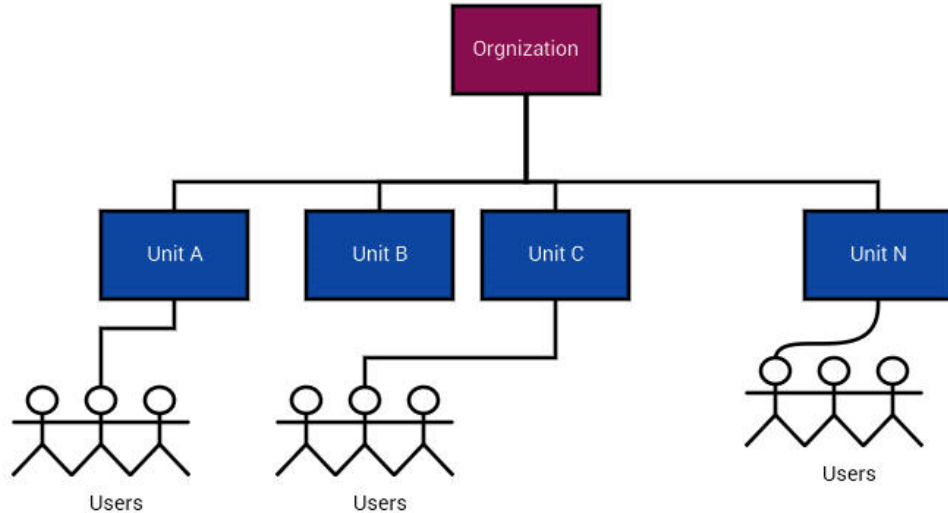
- Xlink is a very simple web based CRM applications designed to be suitable for different purposes
- Xlink is designed to fit the enterprise and individual business
- You can access Xlink from your PC and tablet via <http://hohex.com/crm/desktop> or from you mobile handset via <http://hohex.com/crm/mobile>
- Xlink enables you following up your customers from the office , customers place and while your on the run

Now lets start setting up your Xlink account >>

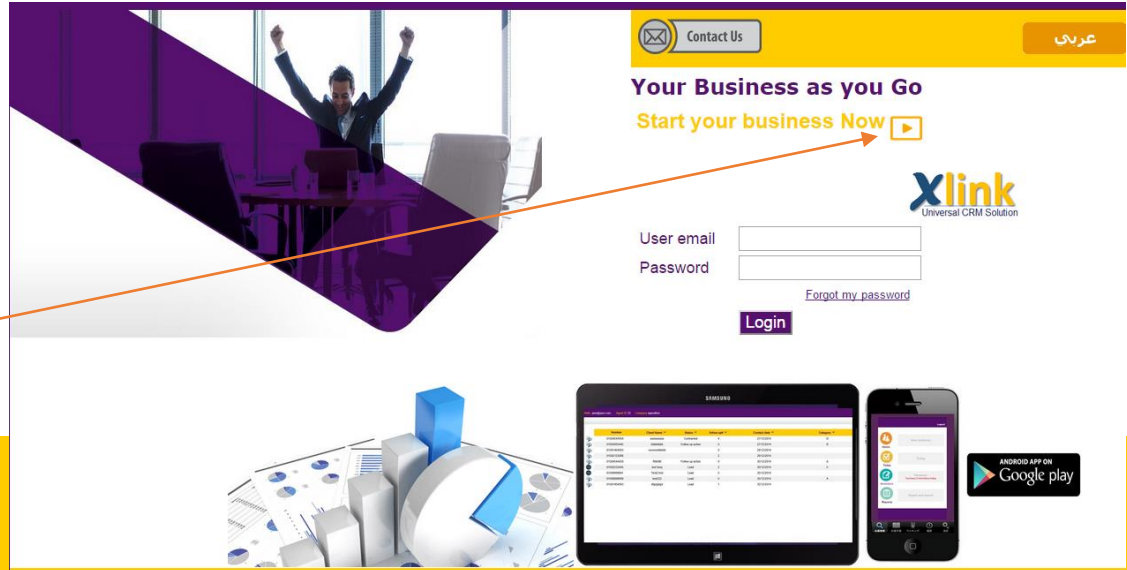


# Setting up Xlink account

- Setting up xlink account will not take more than 1 minutes however you have to understand the post company setting for your xlink account
- When you will create the account ,you will setup a company / organization, this first account will be the administrator of your company
- Then you have to setup at least one unit/team (or different teams as per your company or business structure then you create different users and assigned then the write privilege and place them in the right previously created team/unit as per 1<sup>st</sup> shpown diagarm

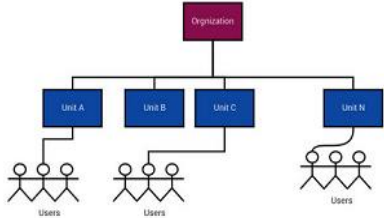


Now lets setup the account step by step by clicking the icon beside start your business Now



# Create the first account step-by-step 1/2

**System and users administration**  
Setup and manage your company resources , users and system permissions.



1- You have to create your company or organization first by assigning administrator and selecting your company name

2- After the successful creation of your company you have to login and from system administration panel you have to create different teams of your company

3- finally you have to create the users of your company and assign them to the previously created teams or units, you have to grant them the right privilege

**Manage Organization**

Start to setup the system by choosing your company name , you have to setup the first administrative user account by entering user email and select the password

Company /Organization name:

Administrator email:

Administrator password:

Re-type password:

Here enter your company name which should be unique ,if the company name is registered before xlink will ask you to change the company name

entre you're your email which will be your login name and the administrator account of the company

Select your admin password with minimum 6 characters

Click submit to create your company

# Create the first account step-by-step 2/2

Your Organization [[MyCompany](#)] has been created successfully



You can access your company system using [[user1@mycompant.com](#)] as an administrator

[Click here to login now](#) 

[Back to settings](#)

After the successful creation of your organization you should login again to activate your account






Remember this account you have created will and administrator account



# Setting up your company 1/3

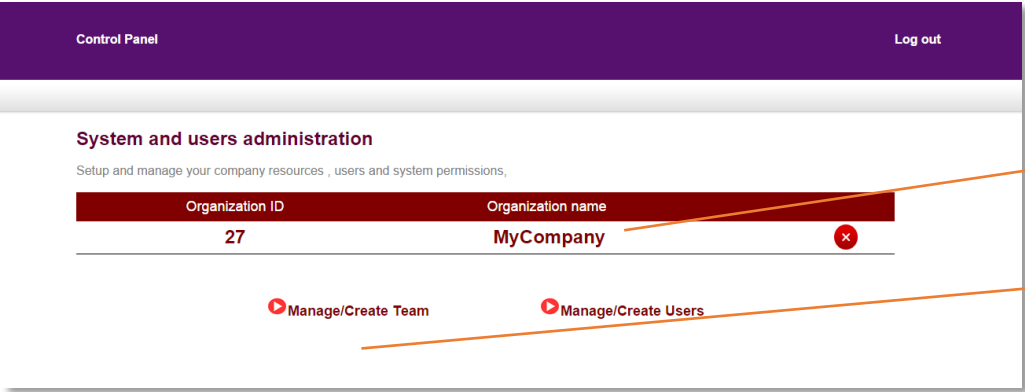
Hello user1@mycompant.com Company MyCompany Logout

You have 0 registered clients

-  Clients  
Add and manage new client section
-  Reminders  
List all your reminder or notes due on today
-  Search  
Search your company clients
-  Reports  
Report and search
-  System Administration Panel

After logging to the system you will be directed to the control panel ,There are different options , one the major feature with your first account is the administrator function where you will continue setup your system  
Click the icon to continue setting up your xlink system

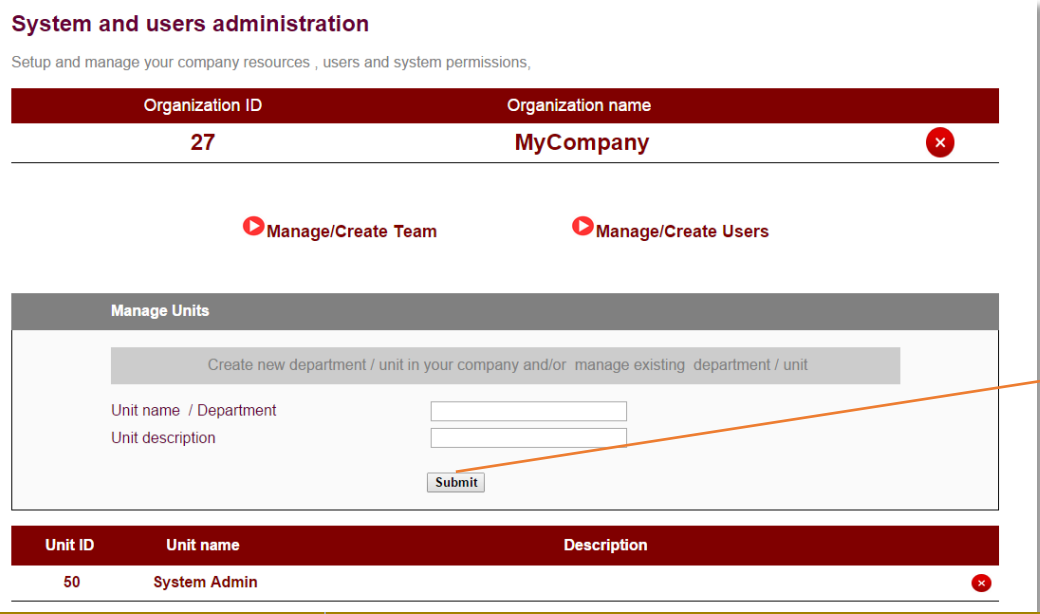
# Setting up your company 2/3



When you access the admin panel you will see your previously created company by clicking **Manage/Create team**

now you have to start creating your company's team

*Note: by default you will find a pre-created team called System Admin, you will find your first account a part of this team/unit*



Create you team by choosing a team name and team description which is optional then click submit

# Setting up your company 3/3

Organization ID	Organization name
27	MyCompany

▶ Manage/Create Team

▶ Manage/Create Users

**Manage Units**

Create new department / unit in your company and/or manage existing department / unit

Unit name / Department:

Unit description:

Unit ID	Unit name	Description
52	business	
50	System Admin	

We have created a new team called business

Now we will create users in our company by click Manage/Create users

▶ Manage/Create Team

▶ Manage/Create Users

**Manage users**

Create new user to start working in your company, assign them to different created business units and departments, manage and assign the different users permission

Name:

email:  will be your login name

Password:   
 password (re-type):

Unit name / Department:

Users group (Permission group):

User ID	Name	email	Unit	Group	Status
54	System Administrator	user1@mycompant.com	System Admin	1	1

To created user

- 1- enter the Name of the user
- 2- the user email which will be the login name
- 3- the user password
- 4- select the team/unit
- 5- User group which will assign different privilege to the users

- 1 System administrate -> provide access to whole system ,create or modify unit and uses
- 2 Agent -> typical user who can use all systems feature without accessing the system admin panel
- 3 Unit manager ->will be able to see all the data and reports for all users
- 4 Viewer -> this user will be able to search the customers data only without adding or editing any



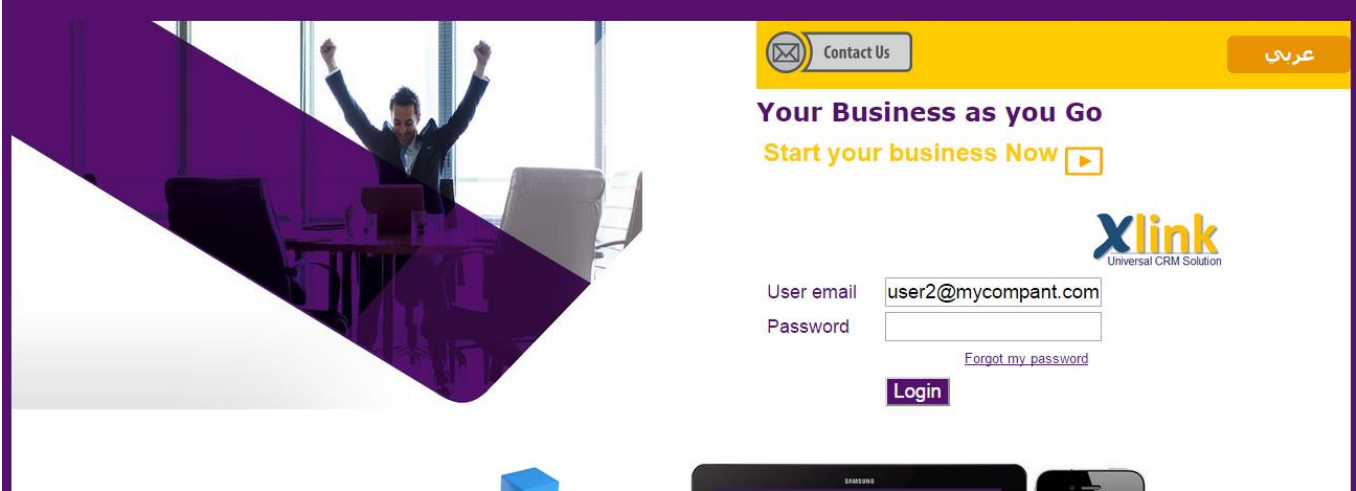


# We are ready Now!

User ID	Name	email	Unit	Group	Status		
54	System Administrator	user1@mycompant.com	System Admin	1	1		
56	user2	user2@mycompany.com	business	2	1		

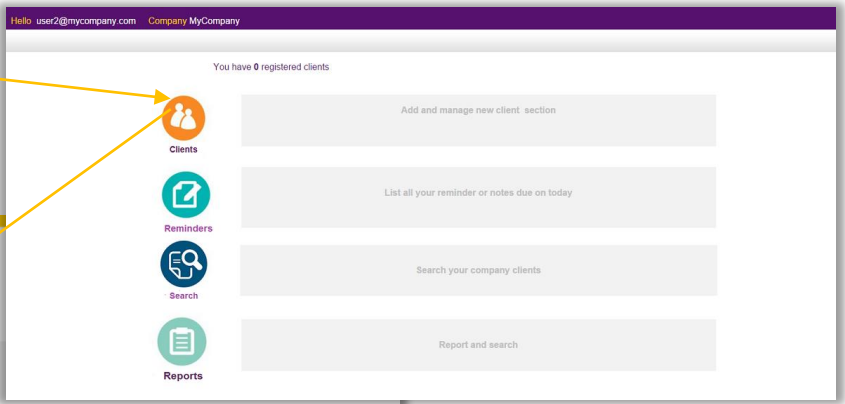
After creating all your users and units we will start using the system

We have created a sample account user2 assigned to team called business with agent privilege



# Add new client 1/2

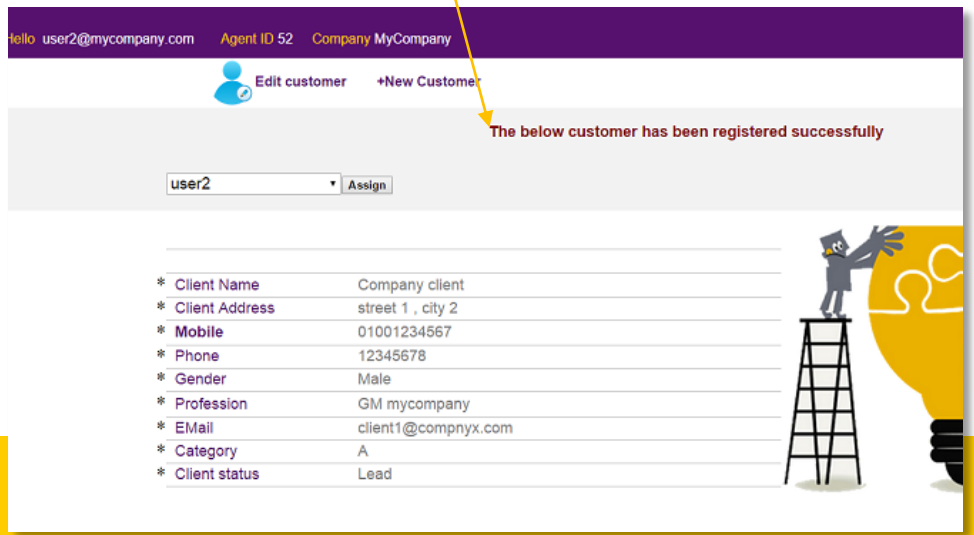
1- from the control panel click client



Client Name: Company client  
Client Address: street 1 , city 2  
Mobile: 01001234567  
Phone: 12345678  
Gender: Male  
Profession: GM mycompany  
EMail: client1@compnyx.com  
Category: A  
Client status: Lead  
Source: Inbound visit  
Contact Date: 24/1/2015  
Meeting location: Cairo Branch  
Demand: Model F  
Note: Delivery date before Feb-2016  
Save Clear

2- Fill the client data form

3- click save to send the client's data to the system and you will see the saved date



# Add new client 2/2

After Adding the client you can assign it to another user (take care If you will assign the client to different user you will not be able to edit it any more until the current user owner assign it back again to you)

hello user2@mycompany.com Agent ID 52 Company MyCompany

Edit customer +New Customer

The below customer has been registered successfully

user2 Assign

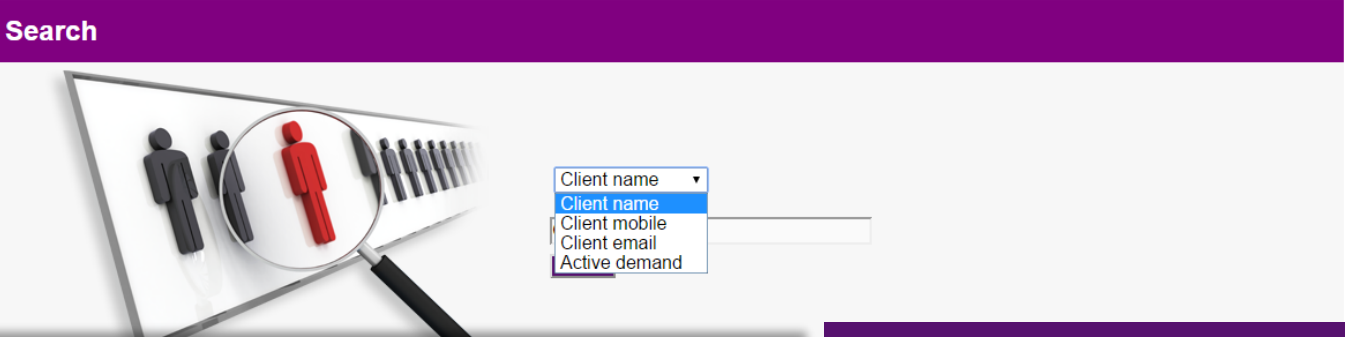
* Client Name	Company client
* Client Address	street 1 , city 2
* Mobile	01001234567
* Phone	12345678
* Gender	Male
* Profession	GM mycompany
* EMail	client1@compnyx.com
* Category	A
* Client status	Lead

You may add a new client data by lick new customer

Or edit the current shown client by clicking edit customer

# Managing clients and follow up options 1/2

1- From the Control panel click search , enter the keyword and search category from the drop down list , then click search



The search result will be shown as below by clicking the arrow on the left hand side you will be directed to the client page



Number	Client Name	Status	follow-up	Source	Contact date	Category
01001234567	Company client	Lead	0	Inbound visit	24/1/2015	A



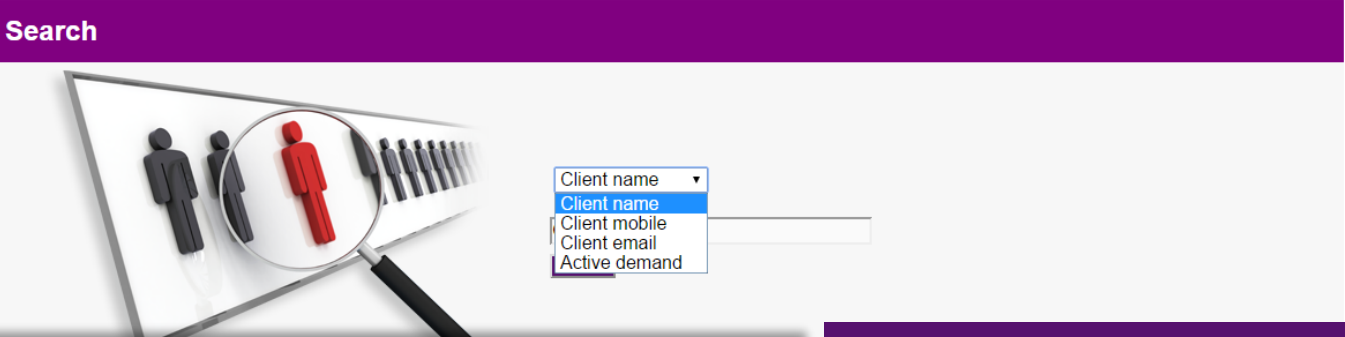
- You can modify the client's data and then press update to save your modification
- Click delete if you want to remove the clients data from the system

Client Name: Company client  
Client Address: street 1 . city 2  
Mobile: 01001234567  
Phone: 12345678  
Gender: Male  
Profession: GM mycompany  
EMail: client1@compryx.com  
Category: A  
Client status: Lead  
Source: Inbound visit  
Contact Date: 24/1/2015  
Meeting location: Cairo Branch  
Demand: Model F  
Note: Delivery date before Feb-2016  
Update Delete

Follow Up (click on the suitable follow-up channel icon for adding new entry)

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EMail: client1@compryx.com  
Category: A  
Client status: Lead  
Source: Inbound visit  
Contact Date: 24/1/2015  
Meeting location: Cairo Branch  
Demand: Model F  
Note: Delivery date before Feb-2016  
Update Delete

Follow Up (click on the suitable follow-up channel icon for adding new entry)

# Managing clients and follow up options 2/2

Now we need to add follow up /note to this customer

At follow up section click the most suitable channel of follow-up sms, meeting, call or email

After filling the follow-up section click save

Client Name: Company client  
Client Address: street 1 , city 2  
Mobile: 01001234567  
Phone: 12345678  
Gender: Male  
Profession: GM mycompany  
EMail: client1@compryx.com  
Category: A  
Client status: Lead  
Source: Inbound visit  
Contact Date: 24/1/2015  
Meeting location: Cairo Branch  
Demand: Model F  
Note: Delivery date before Feb-2016  
Update Delete

Follow Up  
Follow up SMS  
Reminder date: 24/1/2015  
Follow up Note: to arrange a meeting  
Follow up status: Scheduled  
Save

Date	note	Status
24/1/2015	to arrange a meeting .	Scheduled





# xlink

## universal CRM solutions

### ➤ **On demand Development**

we are looking forward to provide you with the best all the time, we are giving a very high attention to your comments and feedback, please feel free to send us your suggestions or comments

### >**Technical support**

if you have a technical issue please feel free to send us your org name and id you login email and please describe your issue also you can send us via [info@hohex.com](mailto:info@hohex.com) or call us 24x7 over +2-01008112235



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