Xlink

Universal CRM system

Solutions to develop the growth

Start-up and user Guide

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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

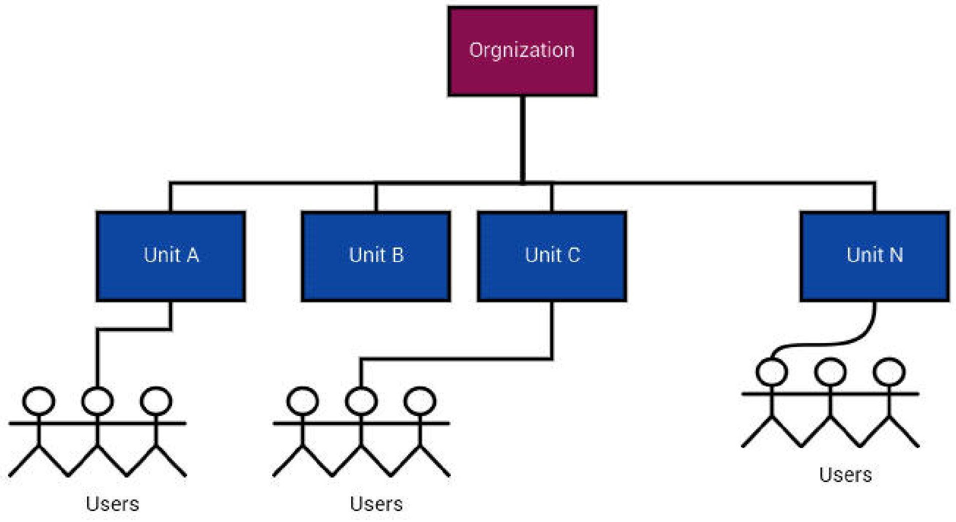
Now lets start setting up your Xlink account >>

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

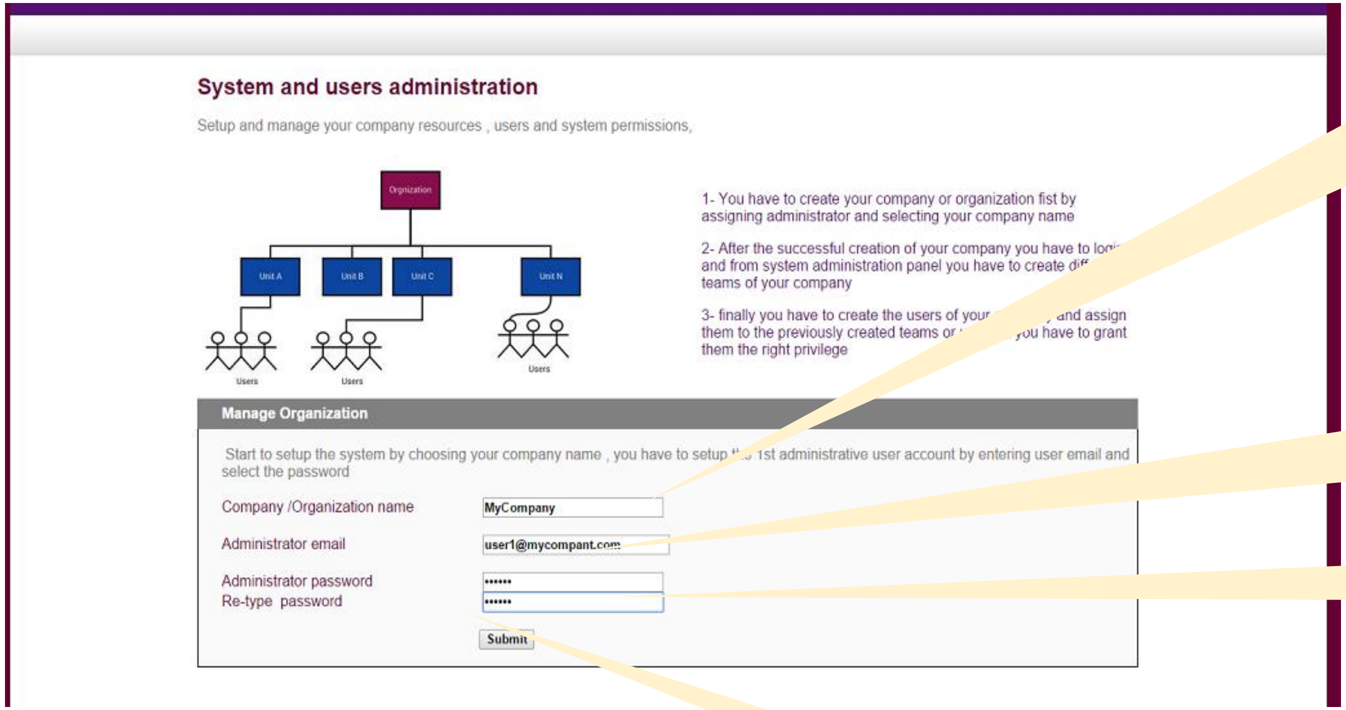
- When you will create the account ,you will setup a company / organization, this first account will be the administrator of your company

- 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 1st 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



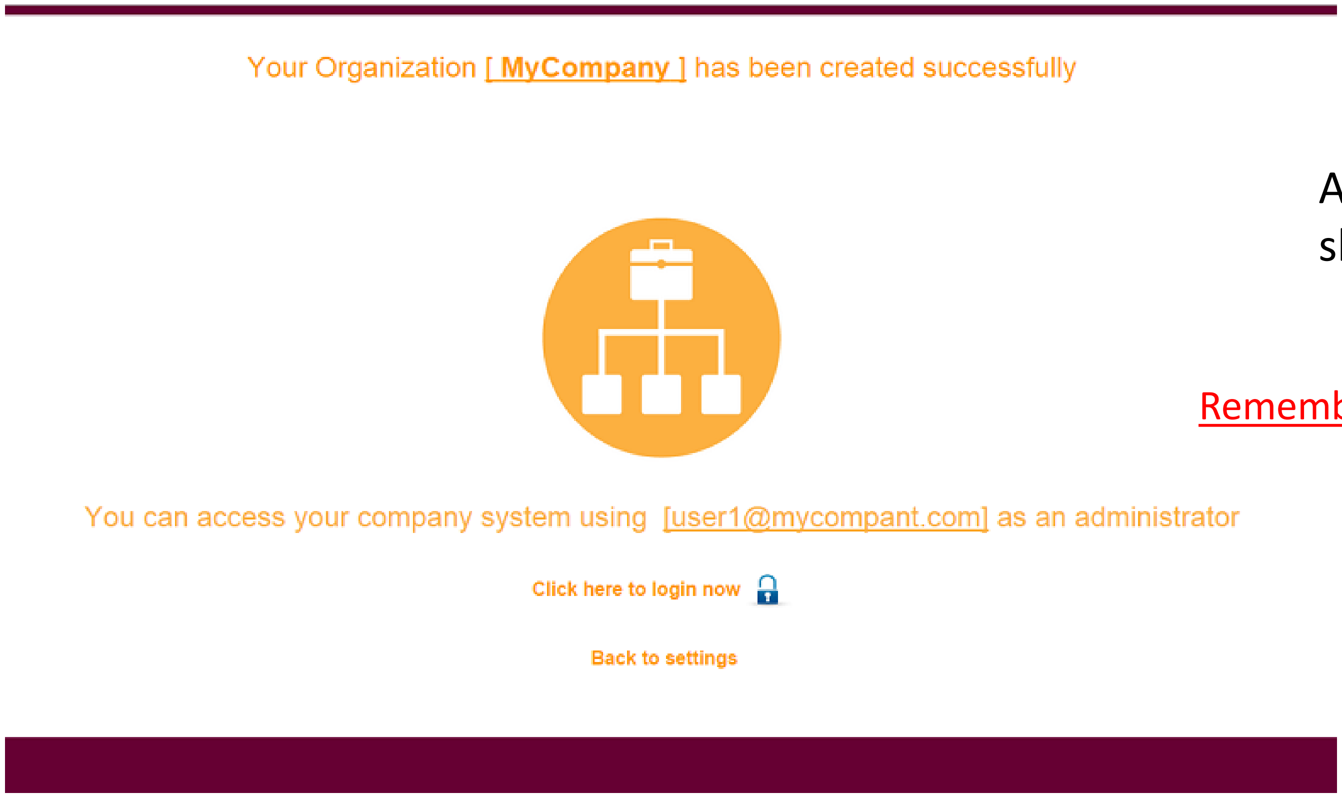
Here entre your company name which should be unique ,if the company name is registered before xlink will ask you to change the company name

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

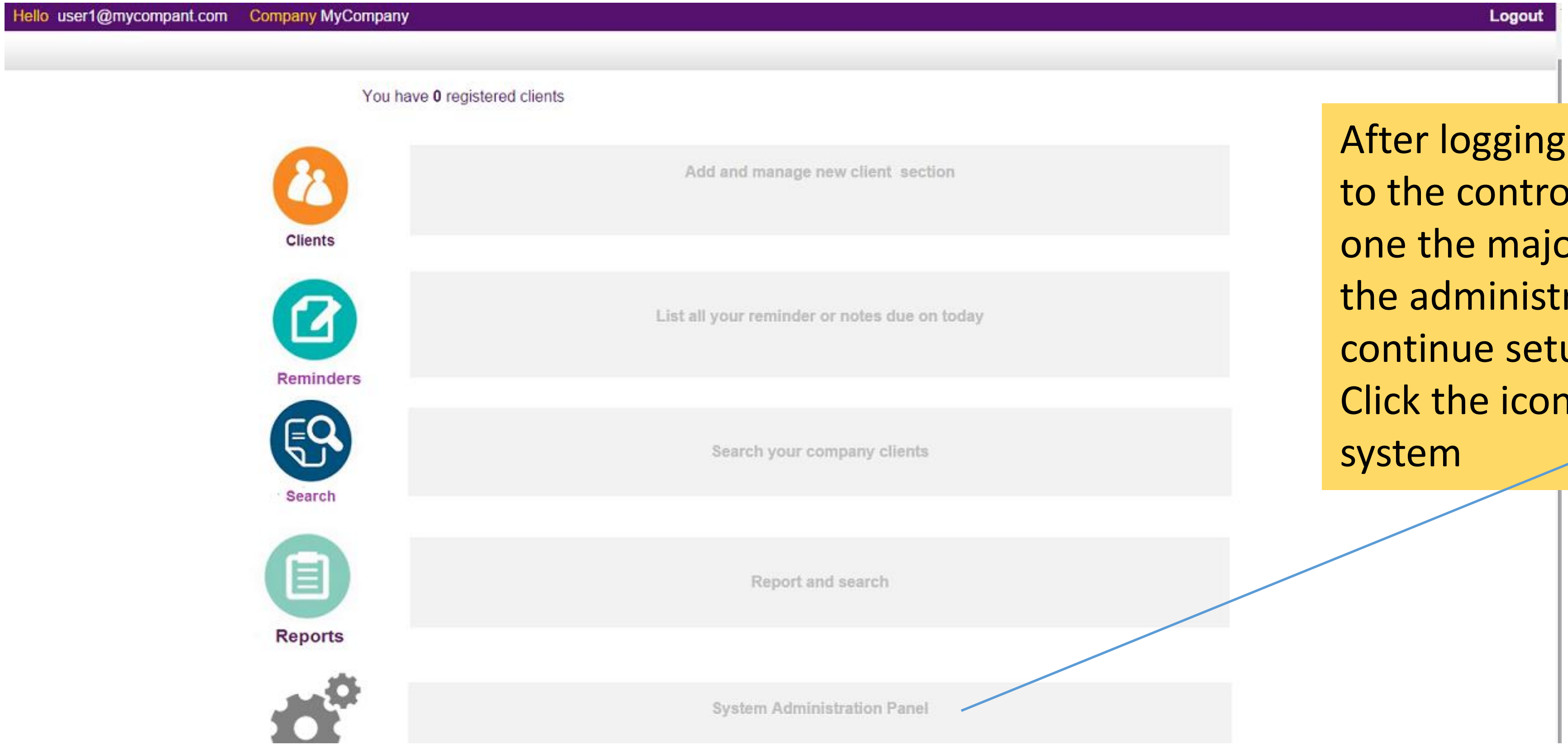


After the successful creation of your organization you should login again to activate your account

Remember this account you have created will and administrator account

Technologies

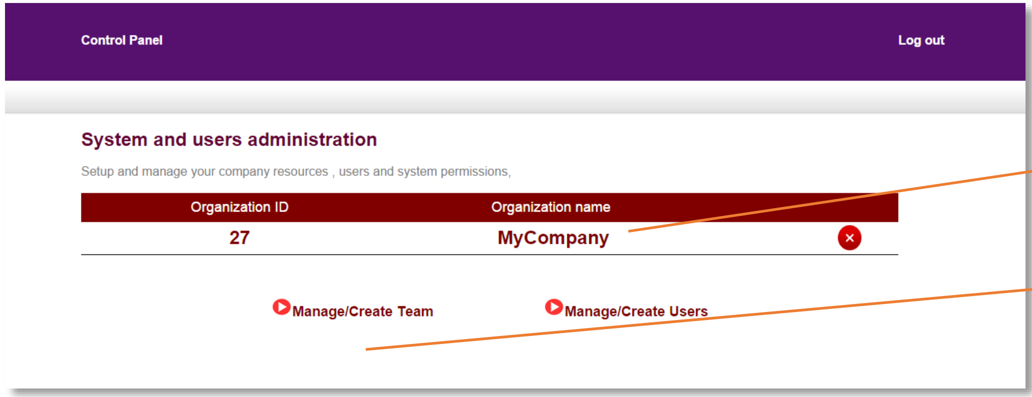
Setting up your company 1/3



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

Technologies

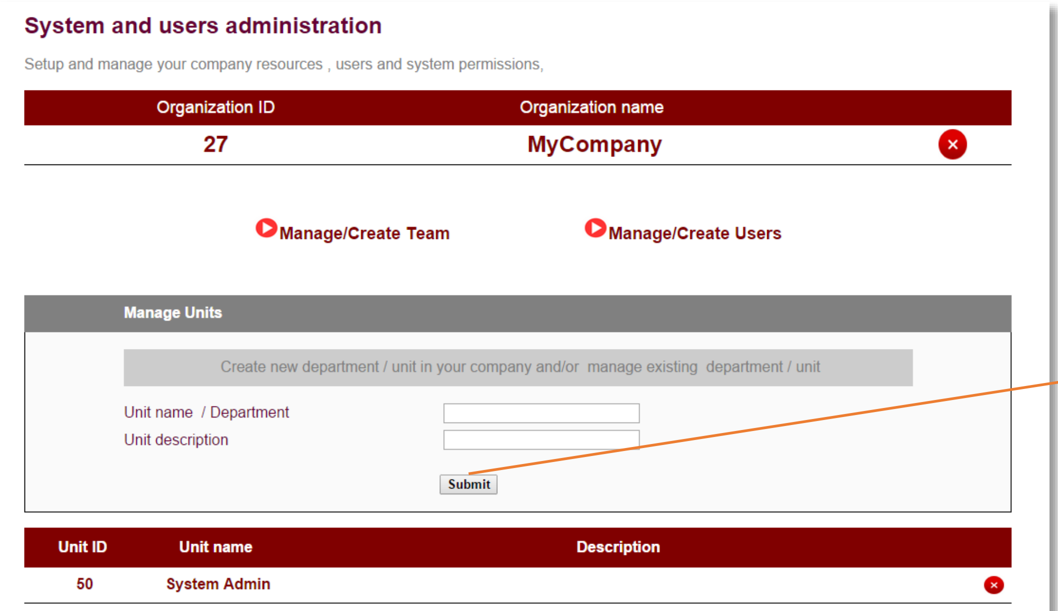
Setting up your company 2/3



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

Technologies

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

Submit

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: user2

email: user2@mycompany.com   will be your login name

Password: ••••••

password (re-type): ••••••

Unit name / Department: business

Users group (Permission group):
- System Administrator
- Agent
- Unit Manager
- Viewer

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

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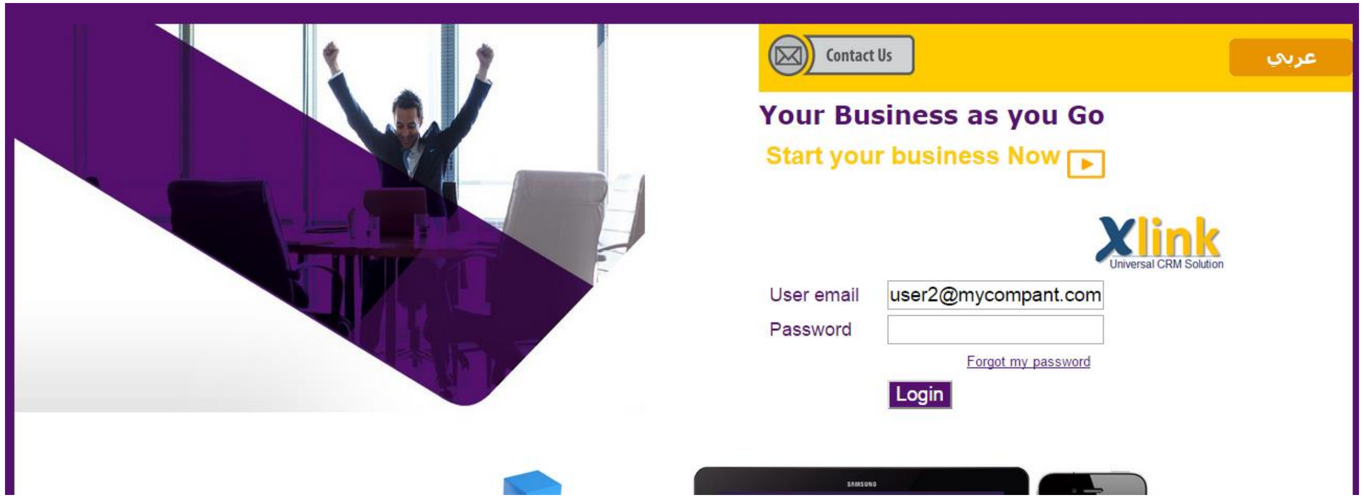
We are ready Now!

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

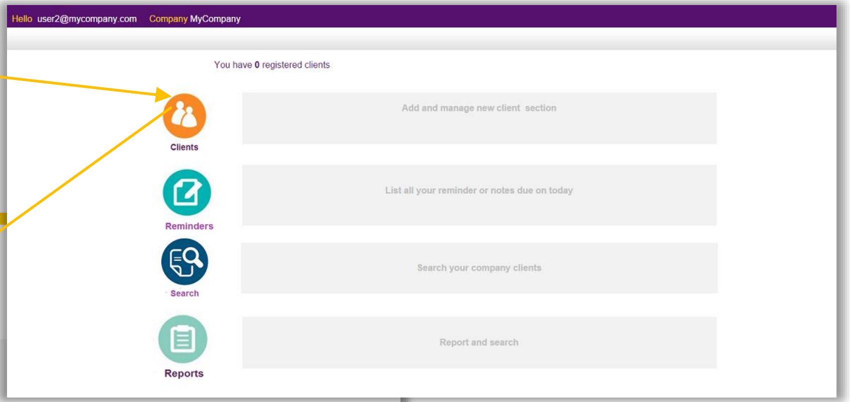


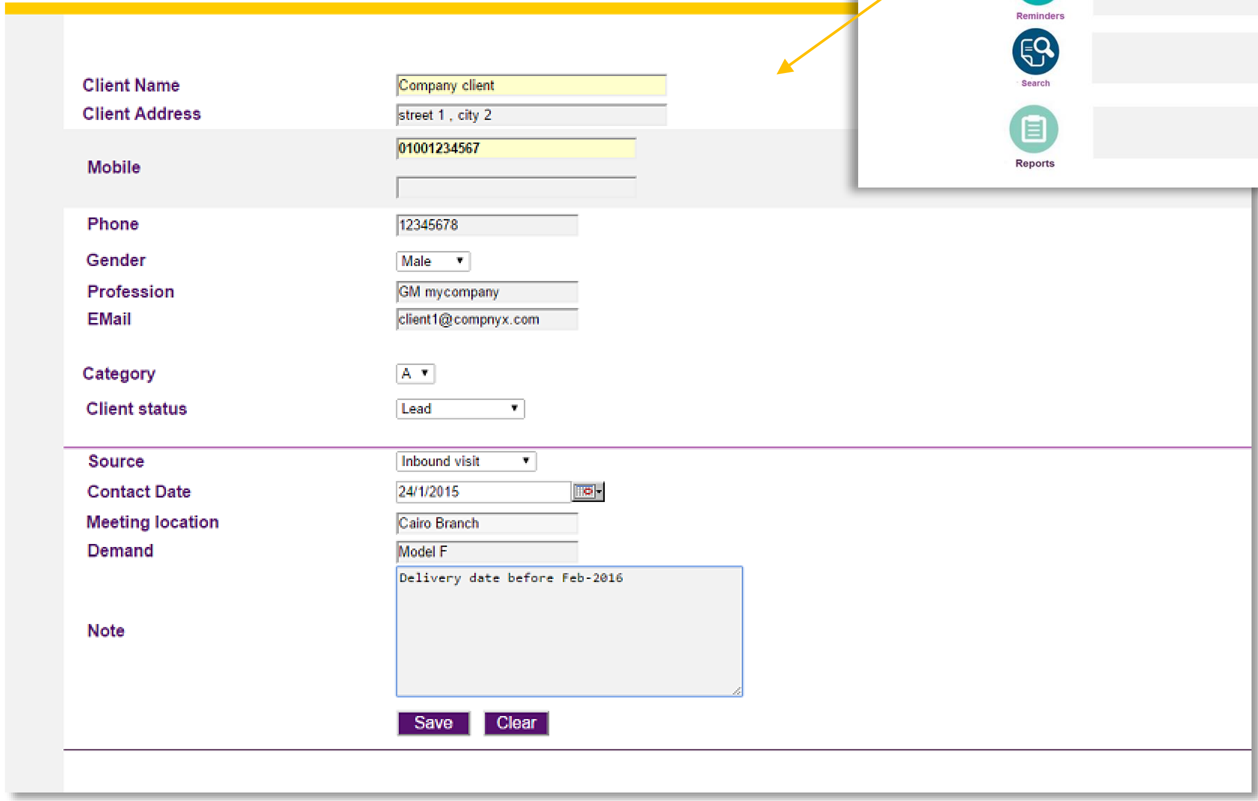
After creating all your users and units we will start using the system

We have created a sample account <u>user2</u> assigned to team called <u>business</u> with <u>agent</u> privilege

Add new client 1/2

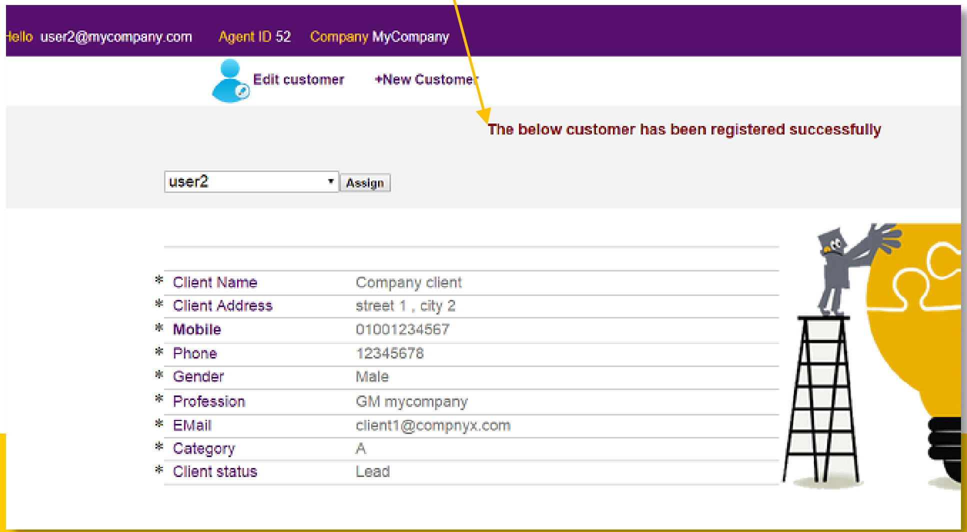
1- from the control panel click client





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



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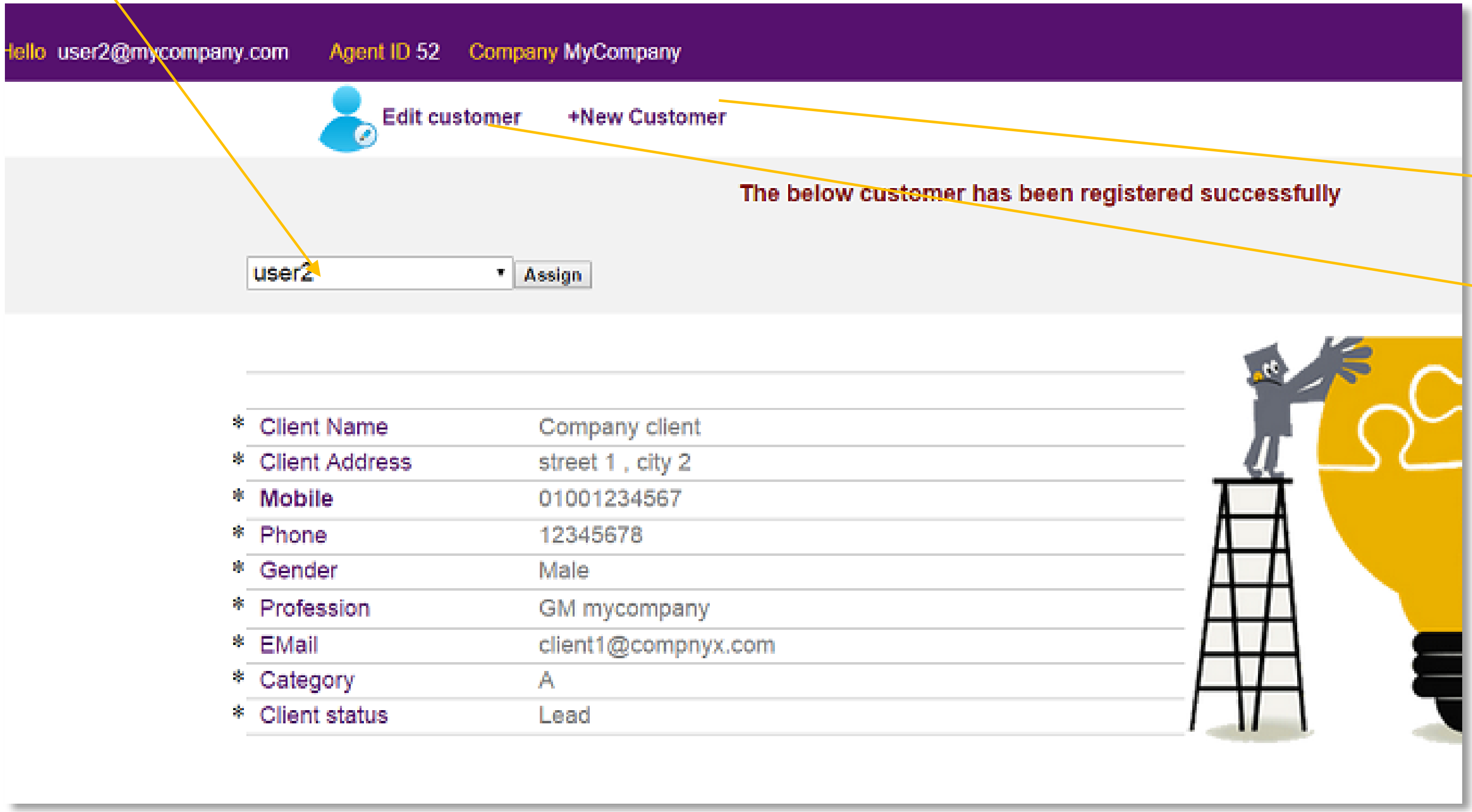
Add new client 2/2

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)



You may add a new client data by lick new customer

Or edit the current shown client by clicking edit customer

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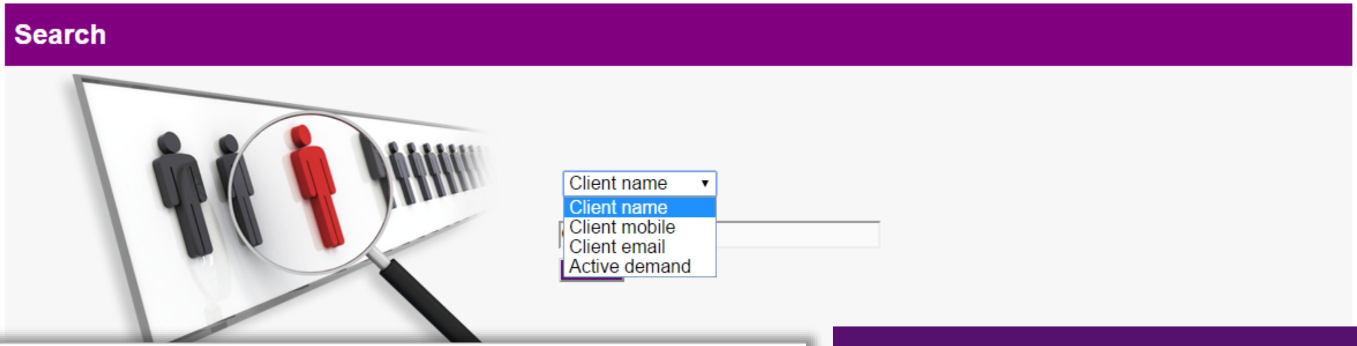
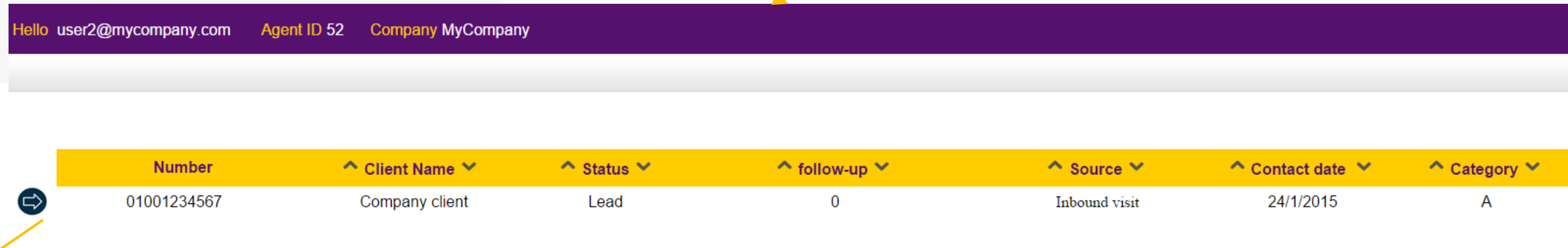
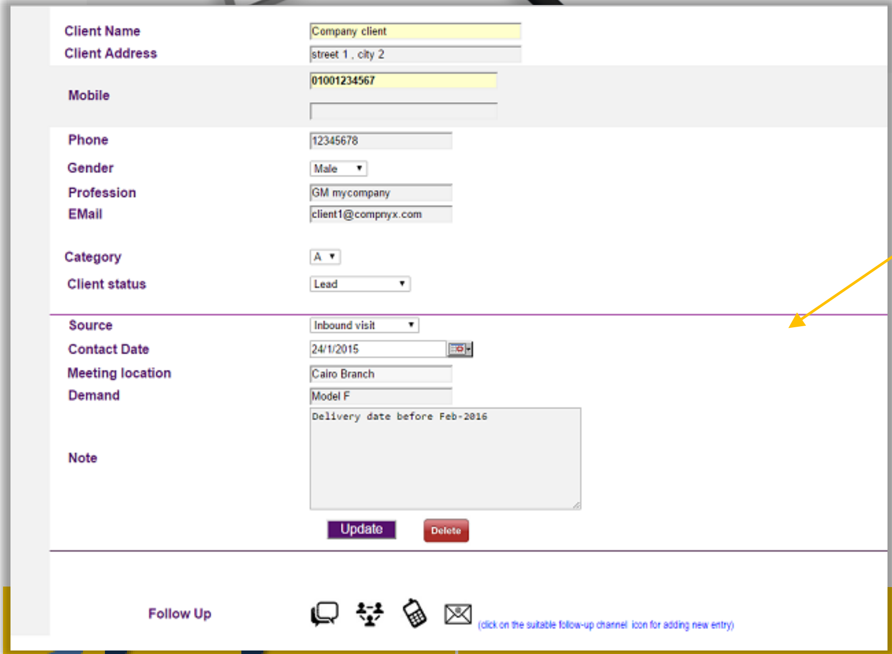
Managing clients and follow up options 1/2

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





- 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

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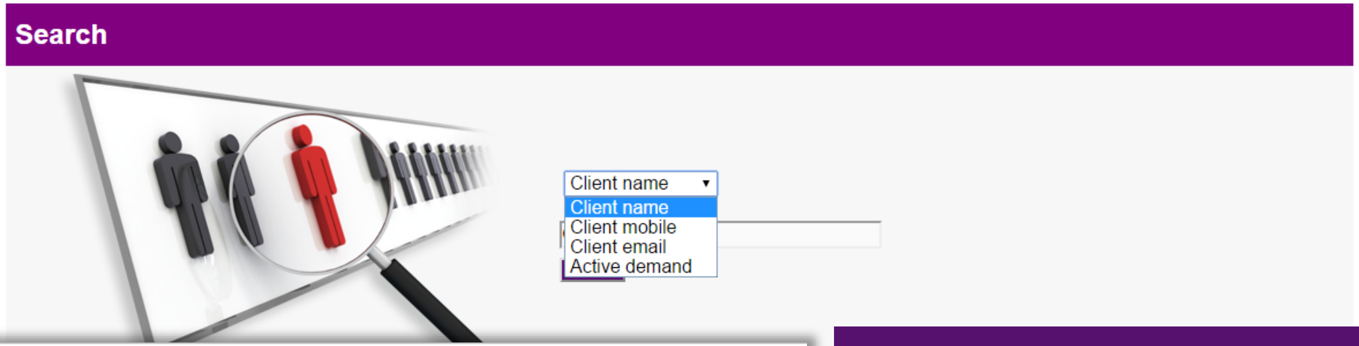
Managing clients and follow up options 1/2

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



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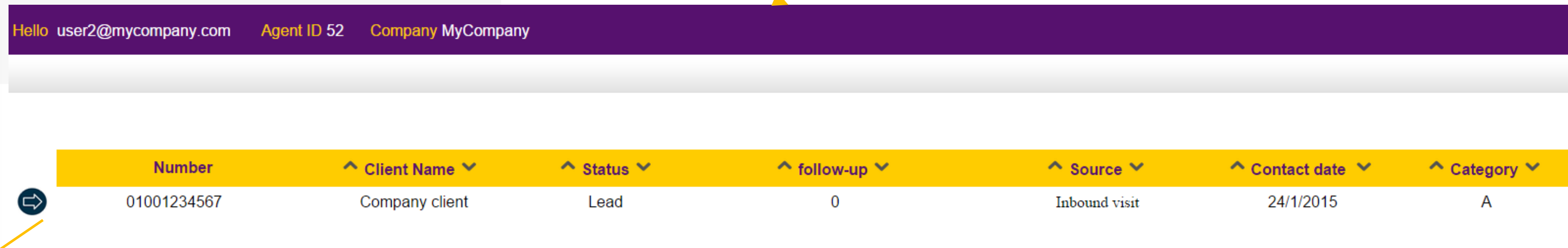

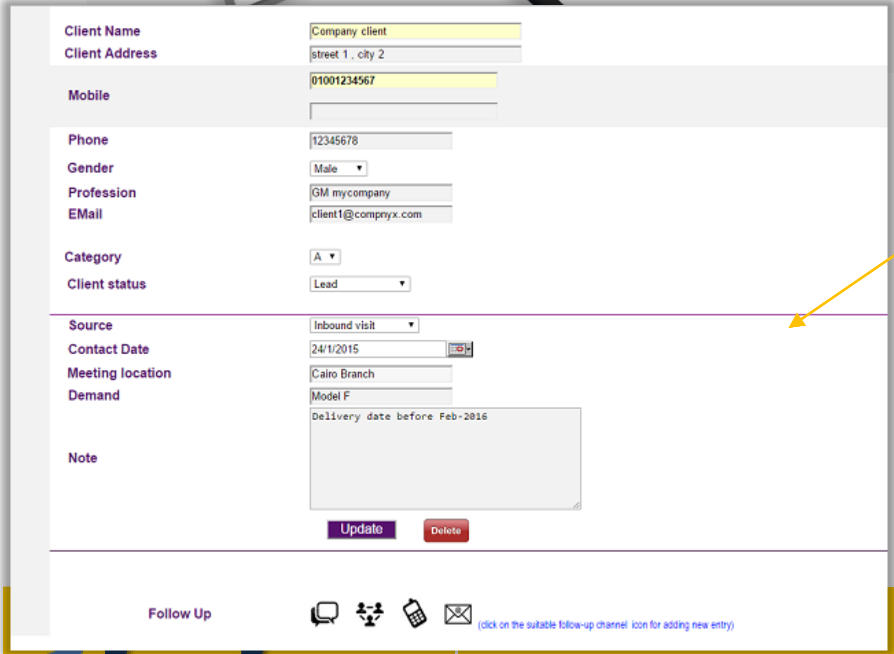

- You can modify the client's data and then press update to save your modification
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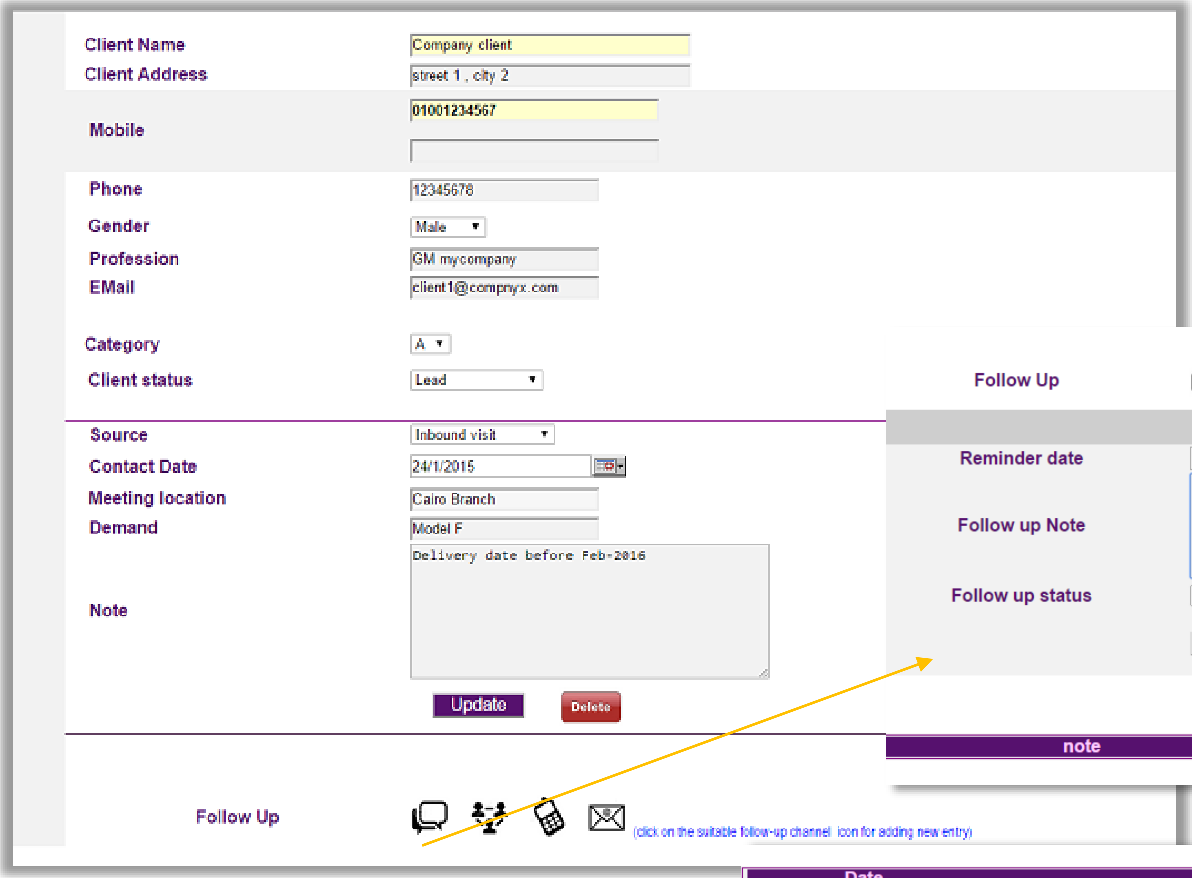
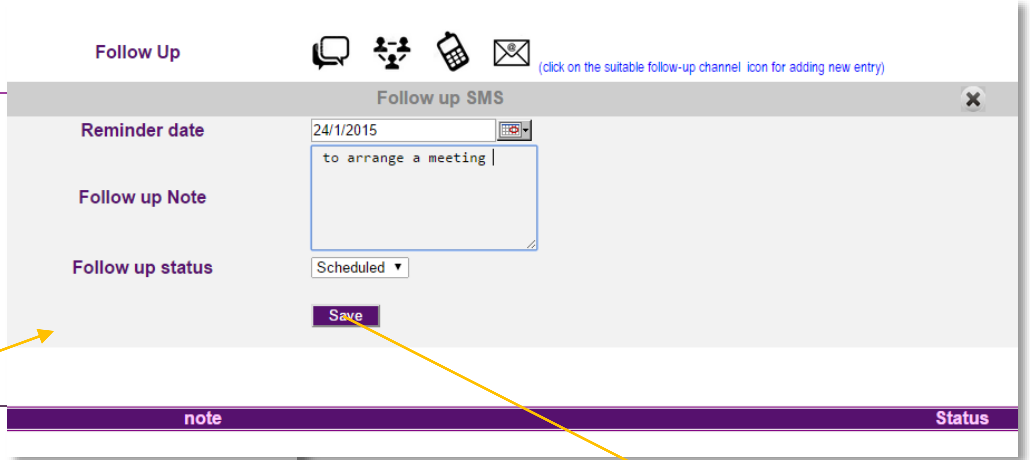
Managing clients and follow up options 2/2

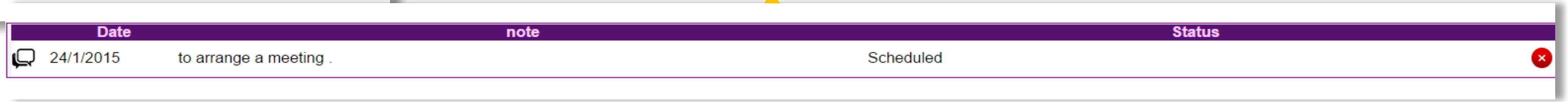
Now we need to add follow up /note to this customer

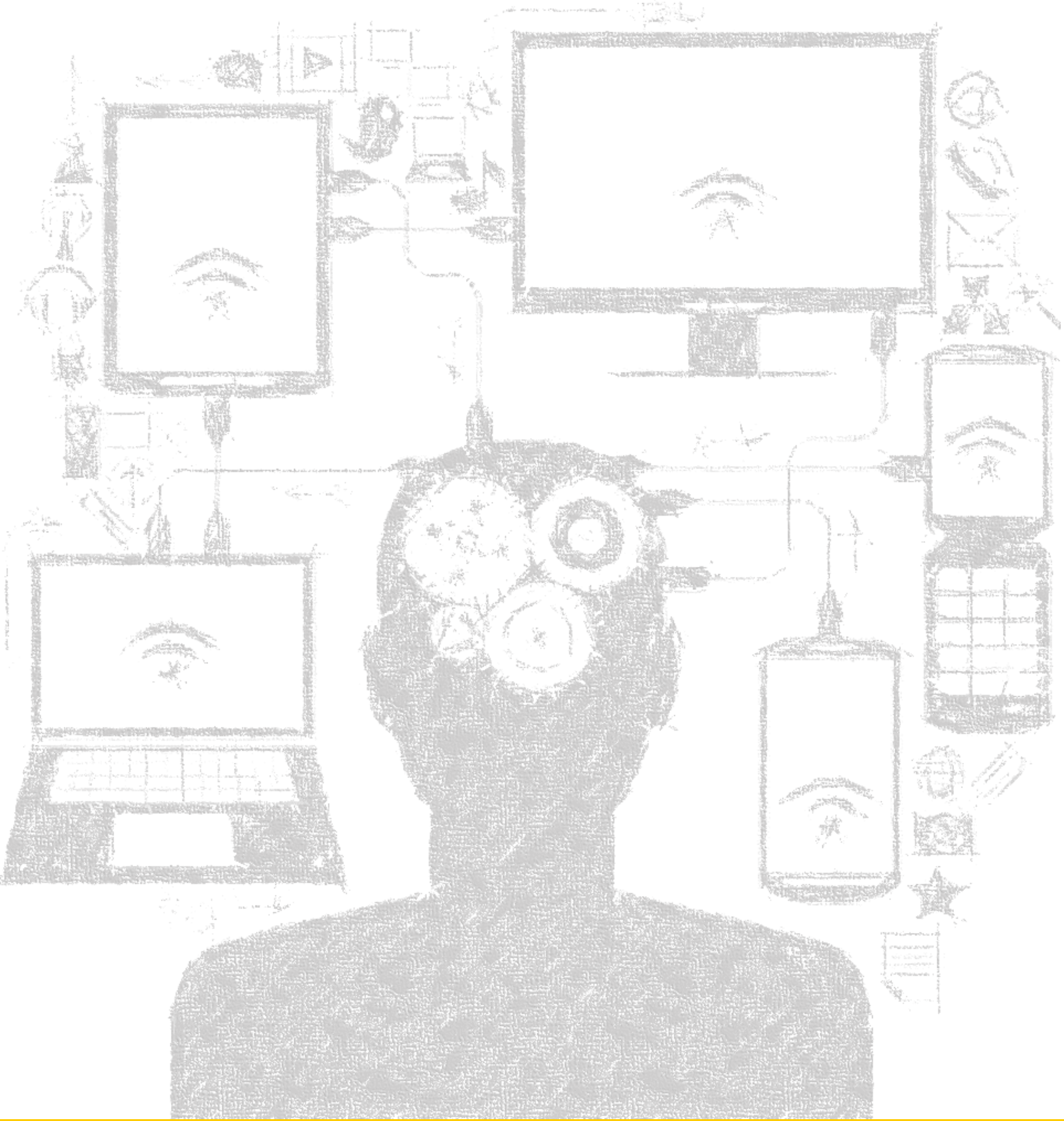
At follow up section click the most suitable channel of follow-up sms, meeting, call or email

After filling the follow-up section click save









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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 viainfo@hohex.com or call us 24x7 over +2-01008112235

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