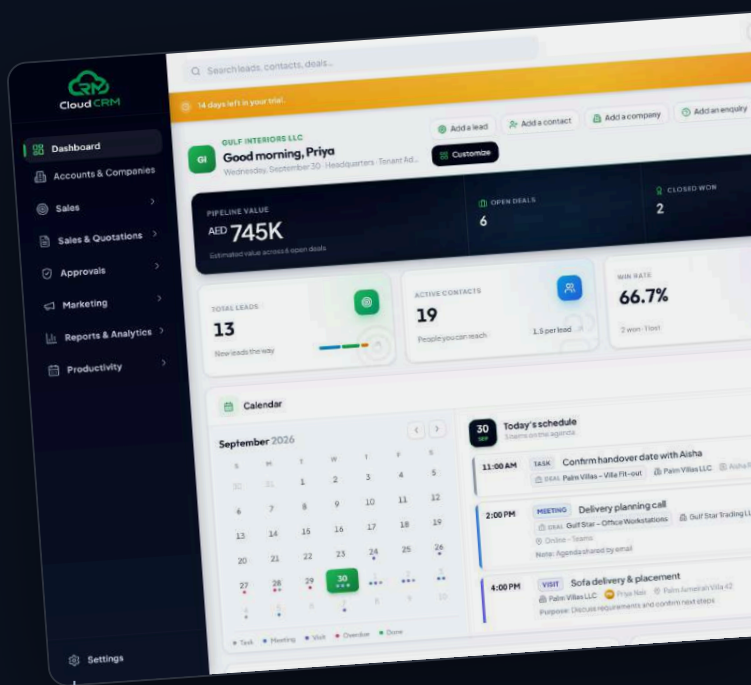
Cloud CRM

User Manual
Every module, explained.

A practical guide for your team: what each part of CloudCRM does, how it changes the way you work, everything included, and step-by-step instructions, all with real screenshots.



Edition
September 2026

Applies to
CloudCRM web app

Languages
English · العربية

How to use this manual

CloudCRM brings your leads, customers, quotations, field visits, marketing and team communication into one place. This manual walks through each module in the order you will find it in the left-hand menu.

The screenshots use a sample company, **Gulf Interiors LLC**, an interior fit-out business in Dubai. Its sales director, **Priya Nair**, works alongside Omar (Sales Manager), Sara and Ahmed (Sales Executives) and Fatima (Marketing). Names and figures are examples only.

Overview
What the module is for, in two or three sentences.

Before & After
How your day changes compared with spreadsheets, WhatsApp and email.

Everything included
The full list of features in the module.

How to
Numbered steps for the most common task.

What you see depends on your role. Your administrator decides which menus and records each person can see (see *Users, Roles & Permissions*). If a menu in this manual is missing for you, ask your administrator to grant access.

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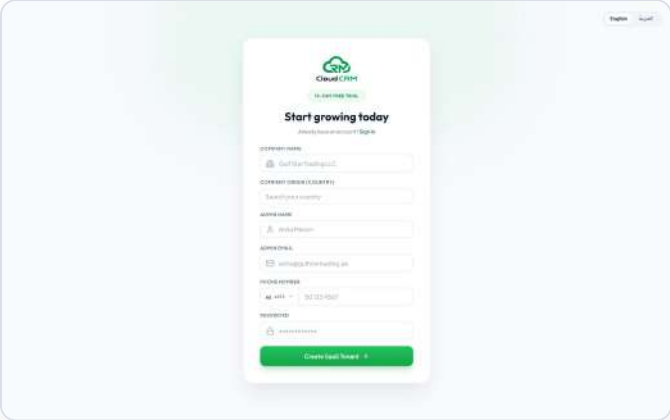
00	Getting started	Sign up, sign in, menu
01	Dashboard	Your home screen
02	Leads	Sales
03	Enquiries	Sales
04	Contacts	Sales
05	Accounts & Companies	Customers
06	Deals	Sales
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09	Approvals	Approval Center
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18	Company Setup	Settings
19	Security	Settings
20	Subscription & Billing	Settings
21	My Profile	Your account
22	Arabic & Right-to-Left	Language

00 Getting Started

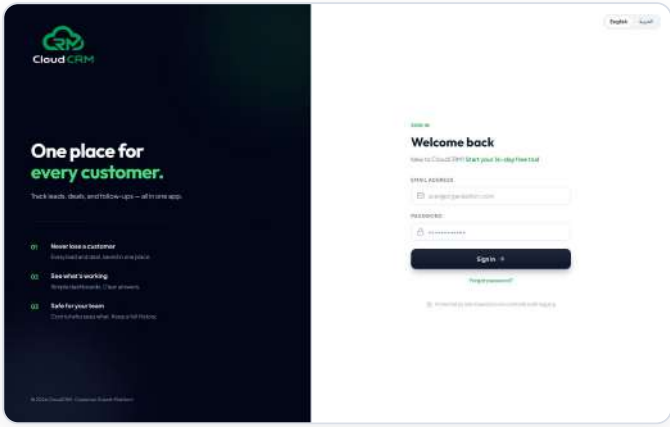
cloudcrm.me · Sign up / Sign in

Overview

Your business can create its own CloudCRM workspace in about a minute. You get a free trial, a ready-made set of roles, and a verification code to confirm your email address. Team members join by invitation and choose their own password, and anyone can reset a forgotten password by email.



Sign up: create your company workspace



Sign in, with the English / العربية switch at the top right

Before & After

BEFORE	AFTER, WITH CLOUDCRM
Setting up a CRM meant a sales call and weeks of configuration.	**You sign up yourself and are working in the same minute, with a free trial.**
Shared passwords were sent to new staff over WhatsApp.	**Each person gets a personal invitation link and sets their own password.**
Too many wrong passwords locked the account until IT stepped in.	**After 5 wrong attempts, a one-time code is emailed so the real owner can get back in.**
A forgotten password meant waiting for someone to reset it.	**Forgot password? sends a secure reset link to your inbox.**

Everything included

- ✓ **Self-service sign-up** creates your private workspace with a head-office branch, department and four starting roles (Tenant Admin, Sales Manager, Sales Executive, Marketing User).
- ✓ Ready-made **lead types, enquiry types, pipeline stages and visit types**, all editable later.
- ✓ **Free trial** on the Starter plan, with a countdown banner on every page.
- ✓ Searchable country list and **phone number with country code**, checked as you type.
- ✓ **Typo check** on email ("Did you mean @gmail.com?") and protection against duplicate sign-ups.
- ✓ **Email verification** by clicking the link or typing the 6-digit code.
- ✓ **Invitation links** that show the person's role, branch and department before they accept. Links are valid for 7 days.
- ✓ **Password reset** links valid for 1 hour. The reset page never reveals whether an email exists.
- ✓ Optional **two-step sign-in** for the whole company: an email code at every login.

✓ Sign-in and sign-up pages available in **English and Arabic**.

How to start your company account

1. Open the sign-up page and fill in Company Name, Country, your name, work email, phone and a password.
2. Click **Create SaaS Tenant**.
3. Open the email from CloudCRM and click **Verify Your Account**, or choose **Enter Code Manually** and type the 6-digit code.
4. Click **Sign In to CRM** and sign in with your email and password.
5. Go to **Settings** → **Users & Team** and invite your colleagues (chapter 17).

Finding your way around

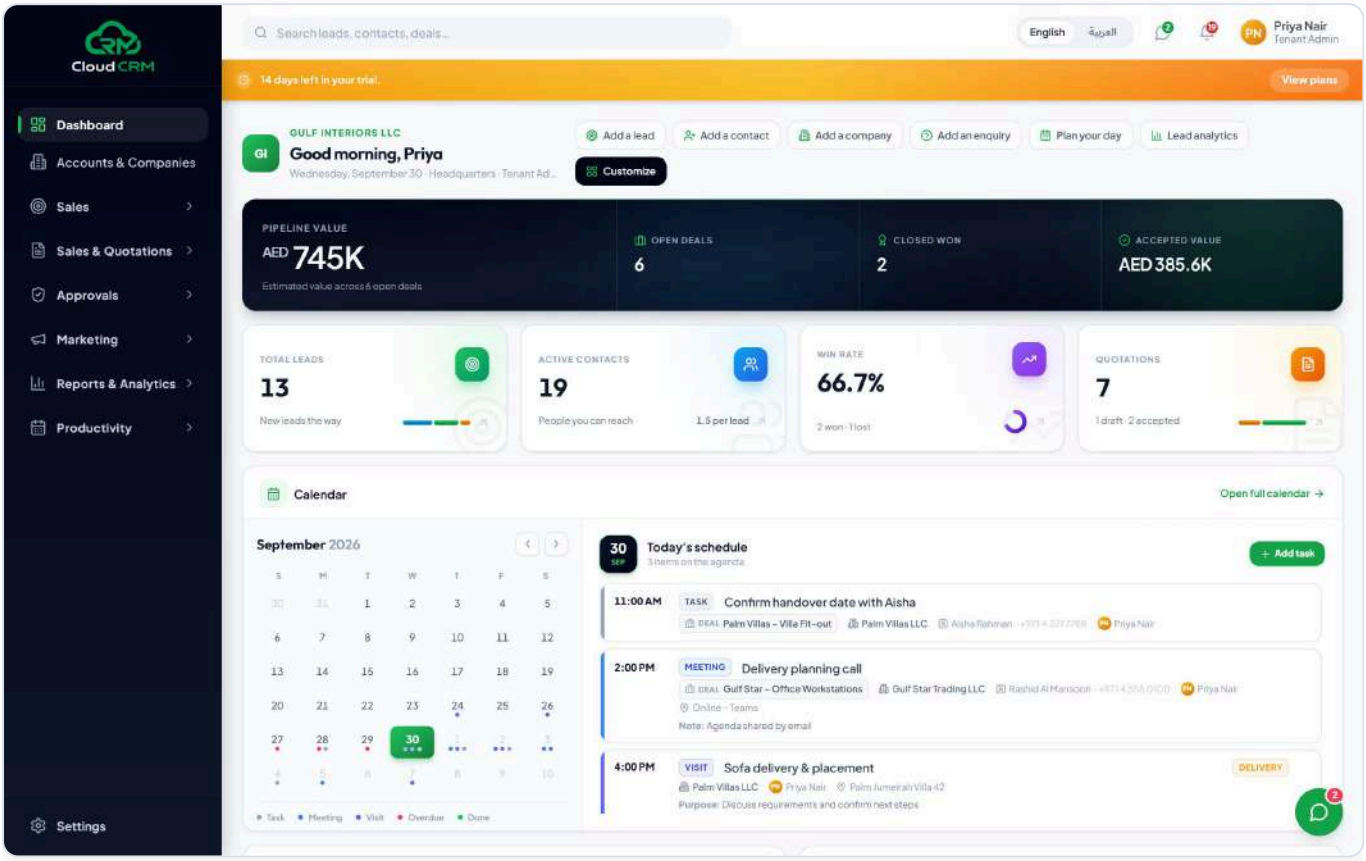
The **left menu** groups everything you need: Dashboard, Accounts & Companies, Sales (Leads, Enquiries, Contacts, Deals, Visits, Team Workload), Sales & Quotations (Products Catalog, Quotations), Approvals, Marketing, Reports & Analytics, and Productivity (Notifications, Task Calendar, Team Chat). **Settings** is pinned at the bottom for administrators. The **top bar** holds the global search, the language switch, Team Chat, the notification bell and your profile menu.

01 Dashboard

Menu → Dashboard

Overview

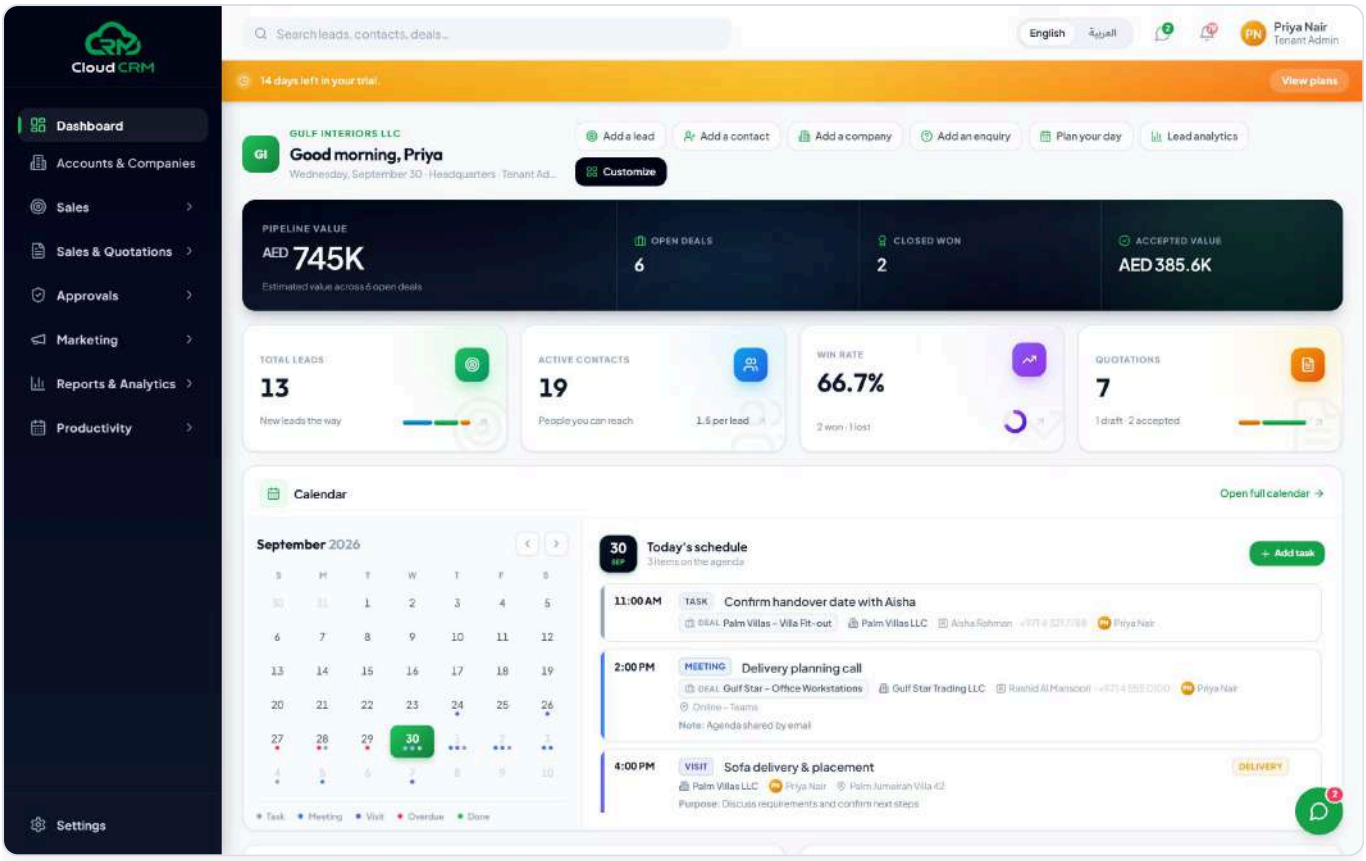
The Dashboard is your home screen. When you sign in, it shows how the business is doing today: pipeline value, leads, win rate, quotations and your schedule. You choose which cards appear and in what order, and CloudCRM remembers your layout on every device.



Greeting, quick actions, pipeline banner, key numbers and today's schedule

Before & After

BEFORE	AFTER, WITH CLOUDCRM
Monday numbers were pulled together by hand from several spreadsheets.	**Pipeline value, win rate and lead counts are live the moment you sign in.**
"What's on today?" meant checking a separate calendar.	**Today's tasks, visits and meetings sit next to the numbers, with overdue items flagged.**
Nobody could see which deal stage was stuck.	**A colour-coded pipeline shows the value sitting in each stage.**
Totals in different currencies were added together wrongly.	**Every total is converted into your company's reporting currency.**
Everyone saw the same generic screen.	**Each person arranges their own dashboard and sees their own figures.**



Calendar widget with the day's agenda, and the charts below

Everything included

- ✓ Personal greeting with your **company logo**, branch and role.
- ✓ **Quick actions**: Add a lead, Add a contact, Add a company, Add an enquiry, Plan your day, Lead analytics.
- ✓ **Pipeline banner**: open pipeline value, open deals, deals won and accepted value.
- ✓ **Key number tiles** for Total leads, Active contacts, Win rate and Quotations, each with a mini-chart. Click a tile to open the list behind it.
- ✓ **Calendar widget**: month view with the day's tasks, visits and meetings, tagged Overdue, Done, Awaiting approval or Reschedule pending. You can add a task straight from the widget.
- ✓ **Lead pipeline by status** and **Enquiries by stage** donut charts.
- ✓ **Win rate** ring, showing won vs lost deals and the open value.
- ✓ **Deal pipeline by stage**, in your own stage colours.
- ✓ **Team activity this month**: tasks, visits and meetings week by week.
- ✓ **New pipeline per month** over the last six months.
- ✓ **Customize**: drag cards to reorder, remove the ones you don't need and add them back later. Your layout is saved to your account.
- ✓ **Everyone sees their own numbers**. Salespeople see their records and administrators see the whole company.
- ✓ Works on phones and tablets, and in Arabic.

How to arrange your dashboard

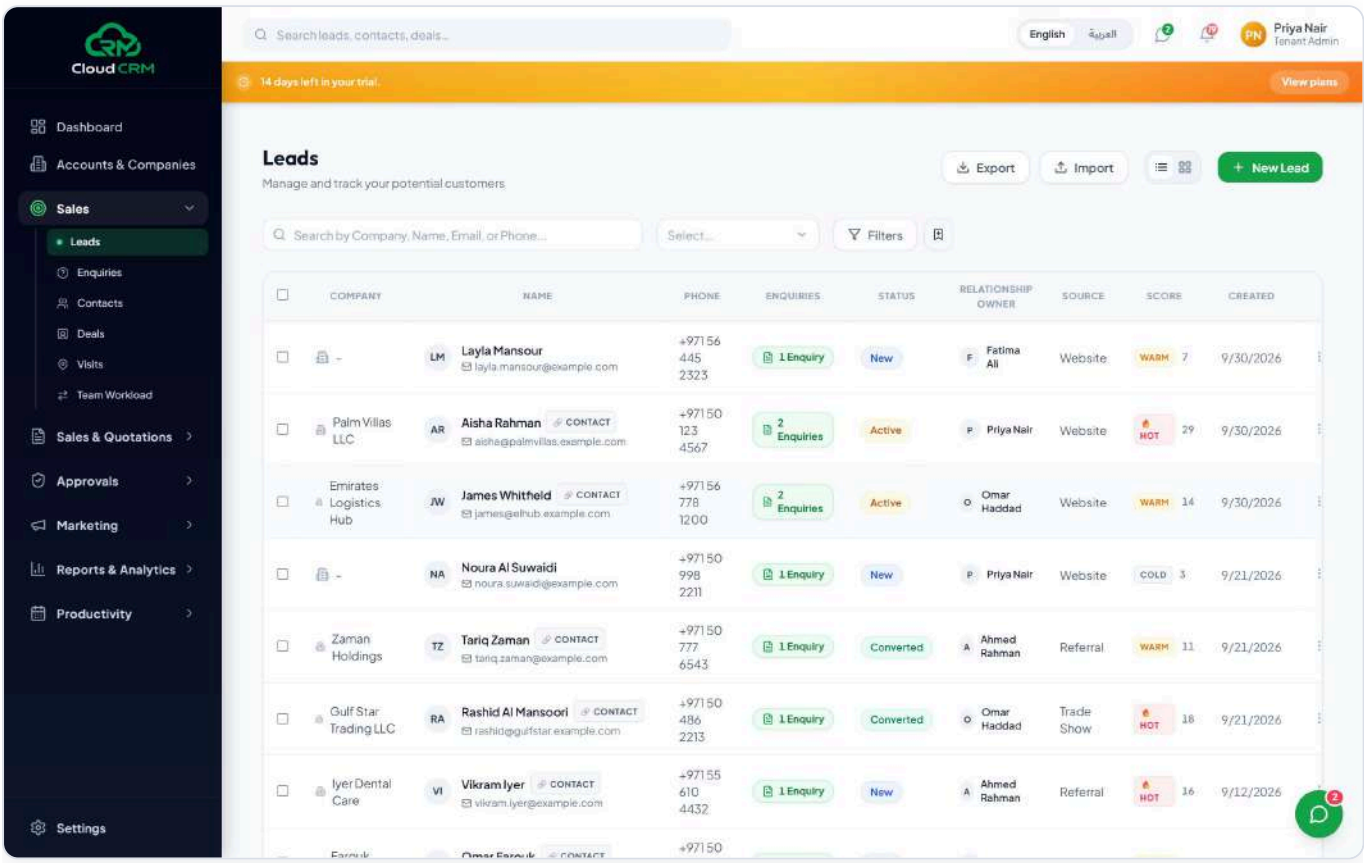
1. Click **Dashboard** in the menu.
2. Click **Customize** at the top right.
3. Drag cards into the order you want, and click the **×** on any card you don't need.
4. To bring a card back, click its chip under **Add back:**.
5. Click **Save layout**.

02 Leads

Menu → Sales → Leads

Overview

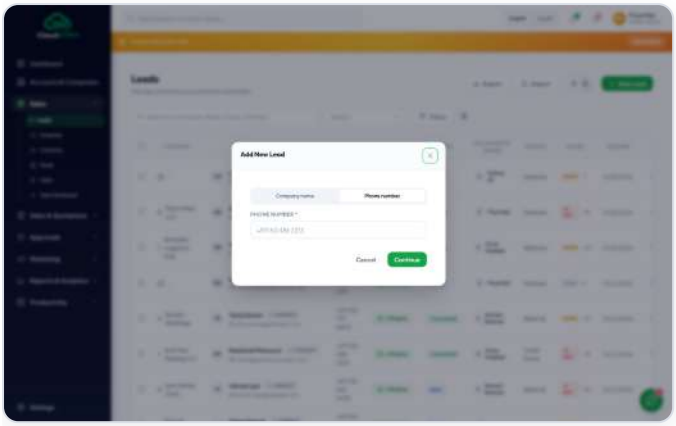
Leads is where you capture every potential customer the moment they call, walk in or send a message. Each lead is saved with its first **enquiry**, so you always know what they asked for. Every lead has one clear owner (the *Relationship Owner*), and its full history is kept in one place.



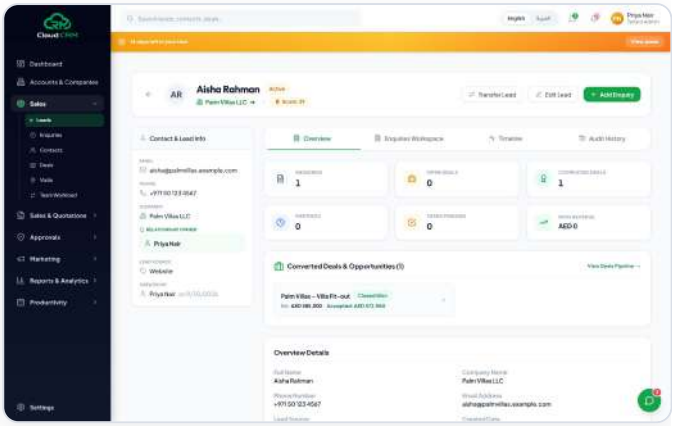
Leads list with company, enquiry count, status, owner, source and the Hot / Warm / Cold score

Before & After

BEFORE	AFTER, WITH CLOUDCRM
Enquiries arrived on WhatsApp, phone and email, got written in a notebook, and some were forgotten.	**Every lead goes in through one form, with its first enquiry attached, a reference number and an owner.**
Two salespeople chased the same customer without knowing it.	**Typing a phone number or company name instantly warns "Existing Lead/Customer Found" and offers to link the new request instead.**
Nobody knew who "owned" a customer, and handovers were verbal.	**One Relationship Owner per lead. Transfers need a reason, are accepted or rejected, and are recorded.**
All leads looked the same in a long spreadsheet.	**Hot / Warm / Cold score badges, filters and saved views bring the right leads to the top.**
Customer history was scattered across chats.	**One timeline shows the notes, tasks, meetings, files and status changes.**



Add New Lead starts from a phone number or company name



Lead Details: contact info, key numbers and converted deals

Everything included

- ✓ **Smart Add New Lead wizard**: start from a phone number or a company name, with live suggestions from your existing records.
- ✓ **Duplicate protection**: warns about an existing lead, customer, company or email, and offers *Open*, *Link New Enquiry* or *Create anyway*. Creating a duplicate requires a reason.
- ✓ **New companies** typed on the form are created automatically as customer accounts.
- ✓ Lead fields: Contact Person, Email, Phone, Company, **Lead Type** (B2B, B2C, Partner/Reseller), **Source** (Website, Referral, Cold Call, Trade Show), **Priority**, Relationship Owner, and the first enquiry's subject and details.
- ✓ A lead is **never saved without its first enquiry**.
- ✓ **List** and **Kanban** views.
- ✓ **Lead score** badge: 🔥 Hot (15 or more), Warm (5–14), Cold (below 5). The score rises when the lead opens or clicks your marketing emails.
- ✓ **Search** by company, name, email or phone, and **filter** by status or salesperson ("My Leads Only").
- ✓ **Saved Views**: save your filters under a name and optionally share the view with the whole company.
- ✓ **Bulk actions**: select several leads to assign them to a colleague, or delete them.
- ✓ **Lead Details** with tabs for Overview, Enquiries Workspace, Timeline and Audit History, plus tiles for enquiries, open and won deals, meetings, pending tasks and won revenue.
- ✓ **Transfer Lead** to a colleague, with a reason and each person's workload shown. The receiver accepts or rejects, and both are notified.
- ✓ **Audit History** of every assignment and transfer: who, when, from, to and why.
- ✓ **Access control**: each role sees either all leads or only the leads assigned to them.

How to add a new lead

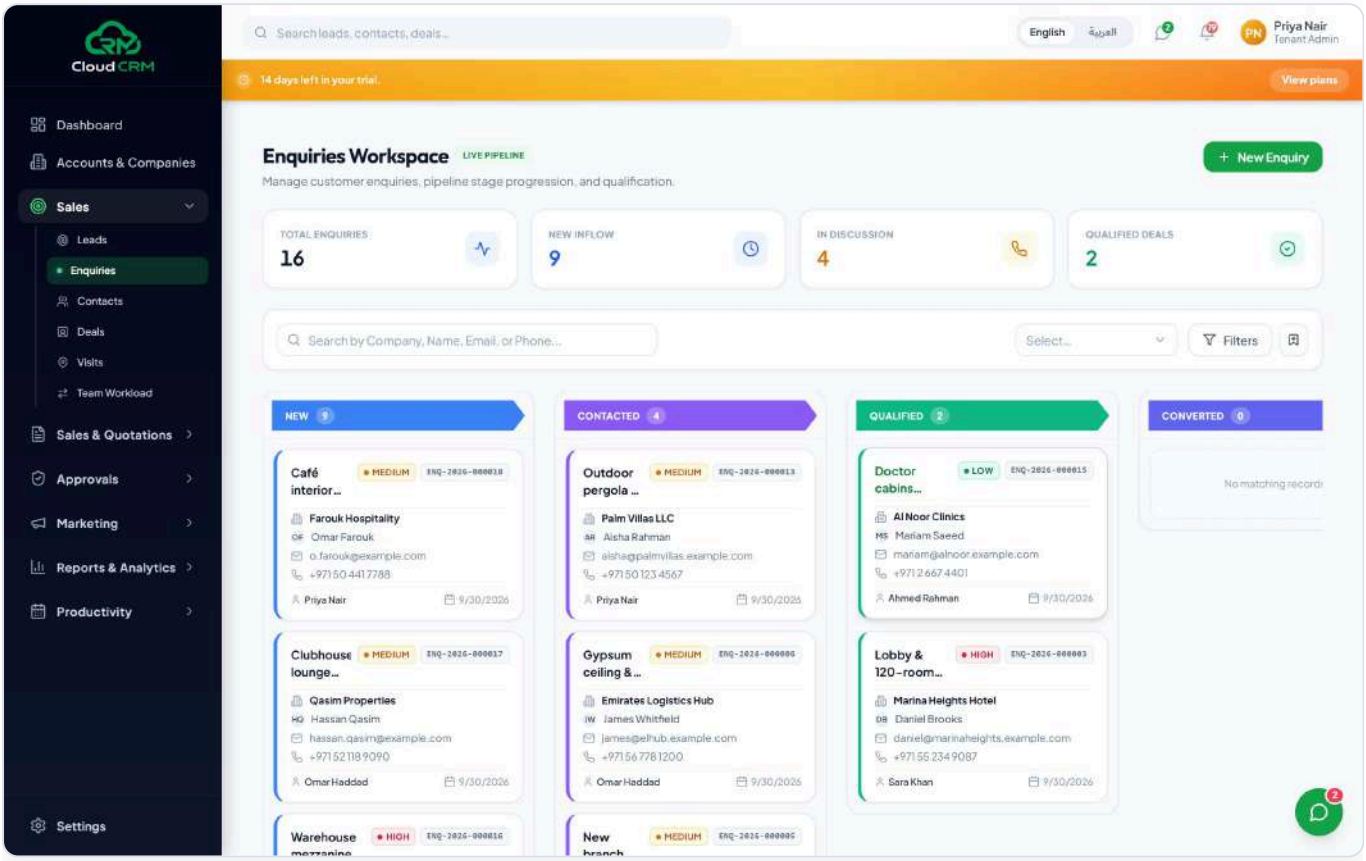
1. Go to **Sales** → **Leads** and click `New Lead`.
2. Choose **Phone number** or **Company name**, type it and click `Continue`. If a match appears, pick `Link New Enquiry` or create a new lead anyway.
3. Fill in the contact person, email, company, lead type, source and priority, and choose the owner under **Assign Lead To**.
4. Enter the **First Enquiry Subject** and any details, then click `Create Lead`.
5. Click the lead's row to open Lead Details, where you can add more enquiries or transfer the lead.

03 Enquiries

Menu → Sales → Enquiries

Overview

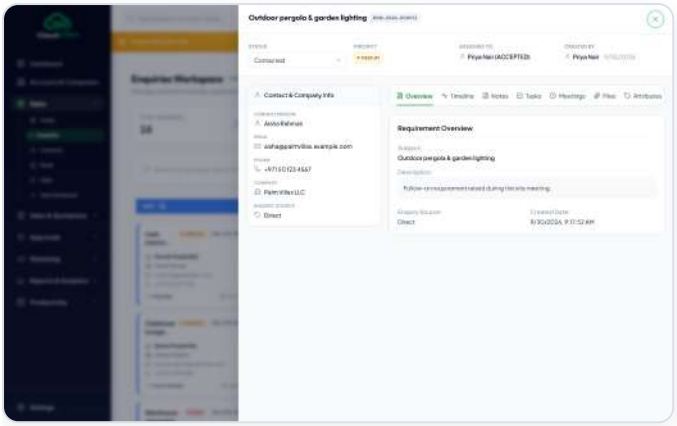
An enquiry is one specific customer requirement, for example "Lobby & 120-room refurbishment". One customer can have many. The Enquiries board shows every requirement moving through your stages (*New → Contacted → Qualified*). A qualified enquiry becomes a sales deal in one click.



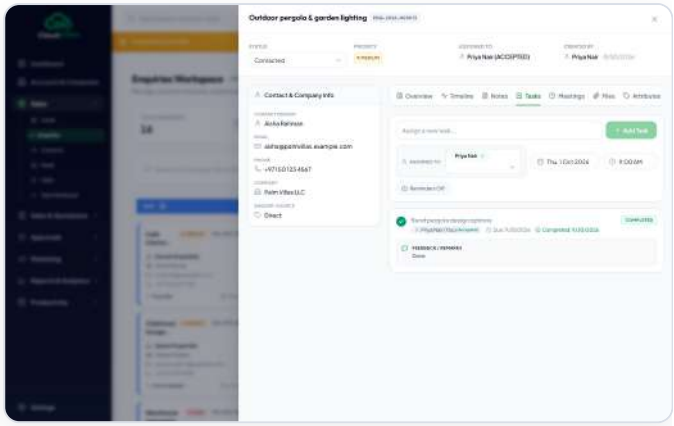
The live Enquiries board: drag cards between stages, with totals at the top

Before & After

BEFORE	AFTER, WITH CLOUDCRM
One customer asked for three things and they got mixed up in one chat thread.	**Each requirement is its own numbered enquiry (ENQ-2026-000001) with its own stage, owner, files and notes.**
Managers asked "where are we with this?" every morning.	**A live board with stage counts shows the whole pipeline at a glance.**
Qualified enquiries were retyped into a separate deals sheet.	**Convert Opportunity creates the contact and the deal in one step.**
Follow-ups depended on memory.	**Tasks with due dates, reminders and accept/complete tracking live on the enquiry.**
Quotes and site photos sat in personal email.	**Files are attached to the enquiry with a description, visible to the team.**



Enquiry workspace: customer card, status, priority and tabs



Tasks tab: assign, set reminders and complete with feedback

Everything included

- ✓ **Kanban board** with drag and drop. Stage colours come from your pipeline settings.
- ✓ Top tiles: **Total Enquiries, New Inflow, In Discussion, Qualified Deals**.
- ✓ **Stage rules**: moving a card backwards asks for confirmation and an optional reason, and watchers are notified.
- ✓ **Automatic numbering**, unique per company.
- ✓ **Search, filters** by stage or salesperson, and **saved views**.
- ✓ **New Enquiry**: link to an existing lead or company, or create a new one on the spot.
- ✓ **Notes** tab for internal notes.
- ✓ **Tasks** tab: one or more assignees, due date and time, reminders (15 min to 1 day before) with optional repeats. Assignees accept, reject or complete with feedback.
- ✓ **Meetings** tab: invitees, clash warnings, and recurring meetings (daily, weekly or monthly). Meetings can be rescheduled, reassigned or cancelled, each with a reason.
- ✓ **Files** tab: drag-and-drop upload (PDF, Word, Excel, images) with preview and download.
- ✓ **Attributes** tab: your own extra fields, for example Trade Licence or VAT Registration.
- ✓ **Timeline** with the full activity history.
- ✓ **Convert Opportunity** creates or links the contact and creates the deal. The enquiry then becomes read-only.
- ✓ **Assignment requests**: the person you assign an enquiry to accepts or rejects it.
- ✓ The **lead's status updates automatically** from its enquiries.

How to take an enquiry from new to deal

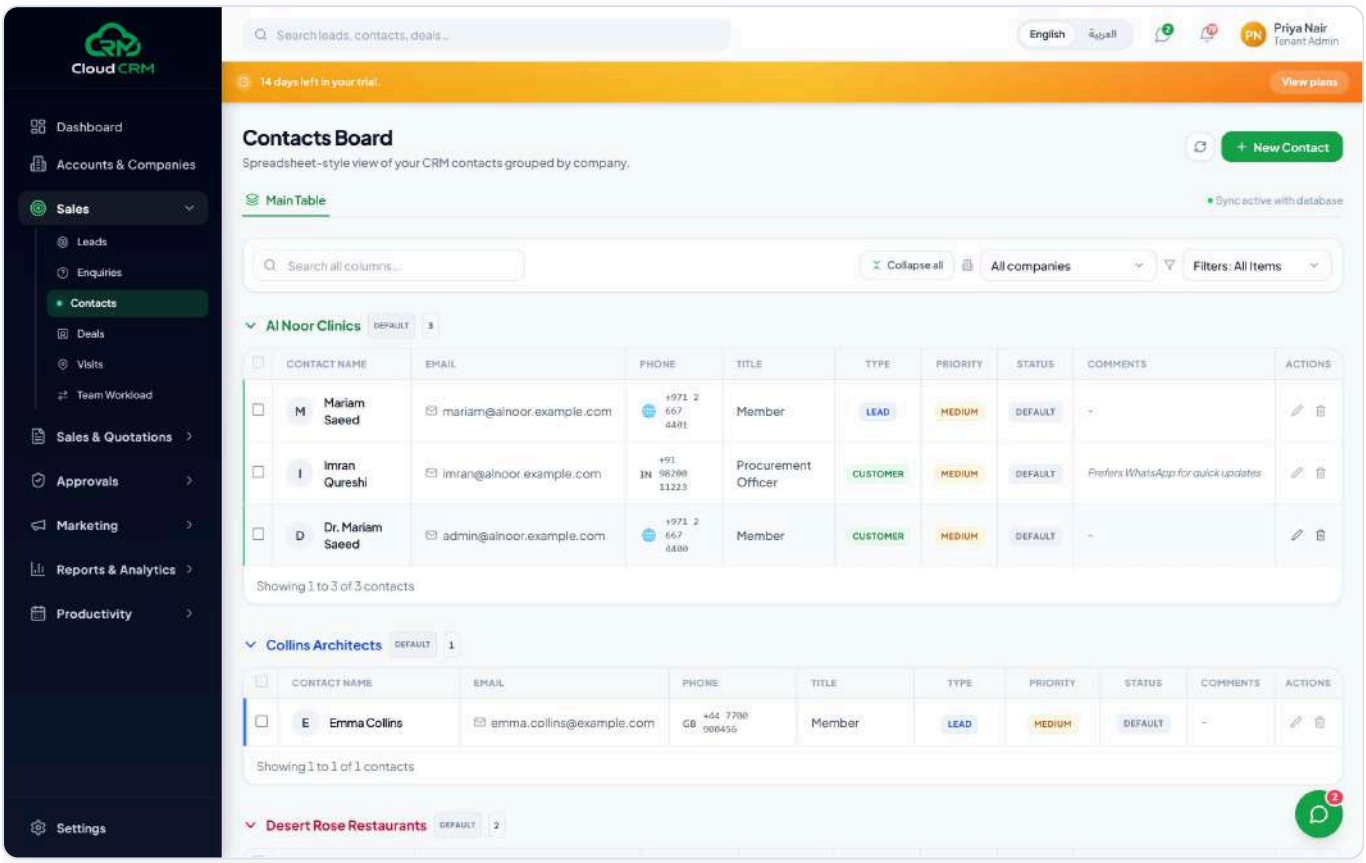
1. Open **Sales → Enquiries** and click `New Enquiry`. Pick the company and lead (or create new ones), enter the subject and save.
2. Drag the card from **New** to **Contacted** once you have spoken to the customer.
3. Open the card and add notes, tasks, meetings and files as the work progresses.
4. When the customer is serious, set the status to **Qualified**.
5. Click `Convert Opportunity`, enter the deal name and expected amount, and confirm. The deal appears in **Deals**.

04 Contacts

Menu → Sales → Contacts

Overview

Contacts is your shared address book of the real people behind every company you deal with. Contacts are grouped by company, so you can see everyone at an account at a glance and which of them currently have live business.



Contacts Board: one table per company, with type, priority and status

Before & After

BEFORE	AFTER, WITH CLOUDCRM
Customer numbers lived on individual phones and business cards.	**One shared, searchable address book grouped by company.**
"Who do we call at this company?" meant asking around.	**Open the company group to see every person, their title and their priority.**
Nobody knew which customers had live business right now.	**An Active badge appears automatically when the company has open deals.**
The same person was typed into three different places.	**Contacts are created automatically from leads, companies and conversions.**

Everything included

- ✓ **Grouped by company**, with colour-striped tables and an "Unassigned Contacts" group. **Expand all / Collapse all**.
- ✓ Columns: name, email, phone (with **country flag**), title, **type** (Customer, Partner, Vendor, Lead), **priority**, status and comments.
- ✓ **Search** across every column, including the company name.
- ✓ **Filters** by company, or by Active / Default contacts.
- ✓ **New Contact** and **Edit** forms, including internal comments.
- ✓ **Automatic Active status** when the contact's company has open deals.
- ✓ **Created automatically** when you add a company with a contact person, add another person at a company from the lead wizard, or convert an enquiry. A company's first contact becomes its primary contact.
- ✓ **Contact Details** panel with company, location and last activity.
- ✓ Deleting a contact **keeps its history**.
- ✓ Access by role: all contacts, or only the contacts of your own accounts.

How to add a contact

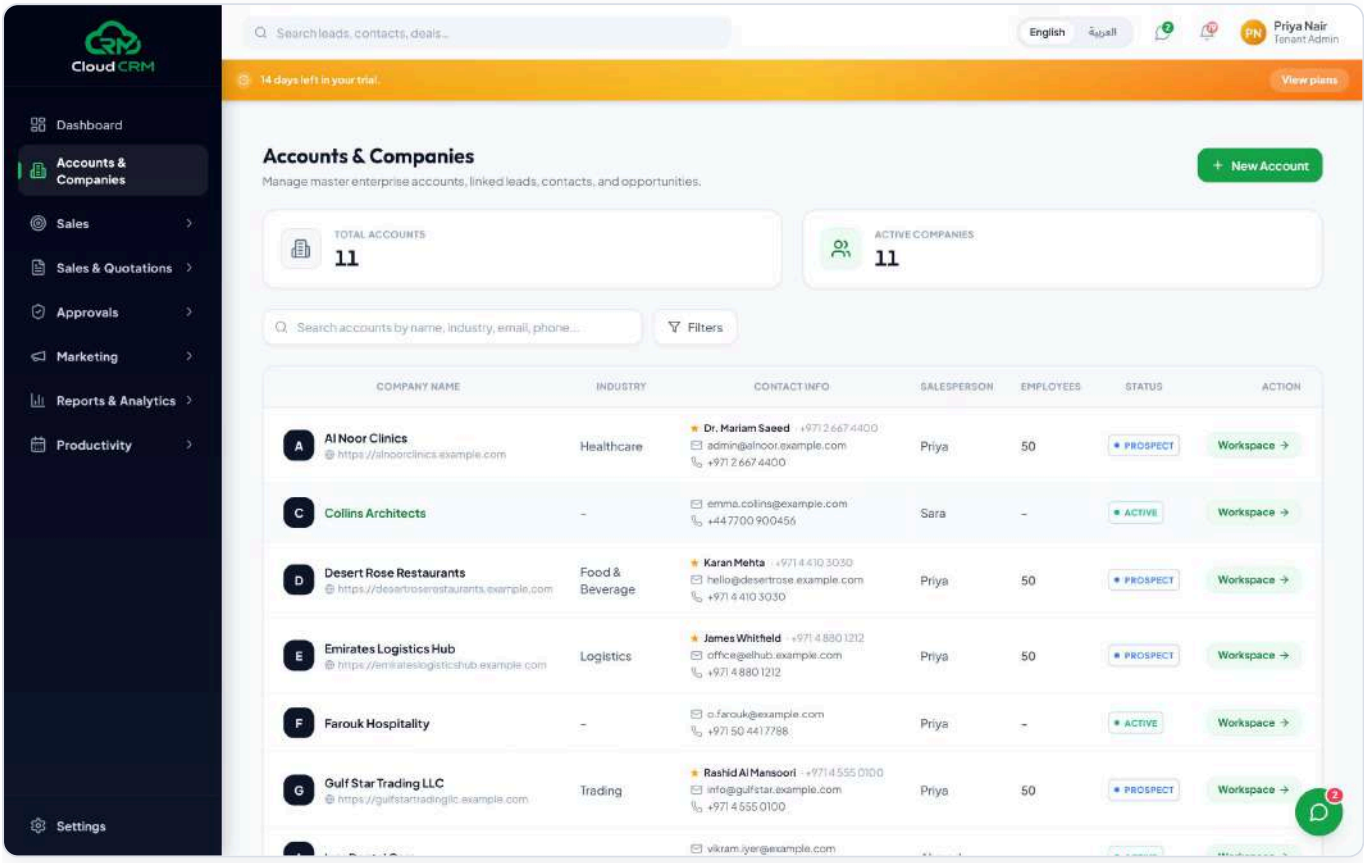
1. Open **Sales** → **Contacts** and click `New Contact`.
2. Enter the contact name, email, phone and job title.
3. Choose the contact type and priority, and add internal comments if needed.
4. Click `Create Contact`.
5. Click the name to open Contact Details. Use `Edit Contact` to make changes.

05 Accounts & Companies

Menu → Accounts & Companies

Overview

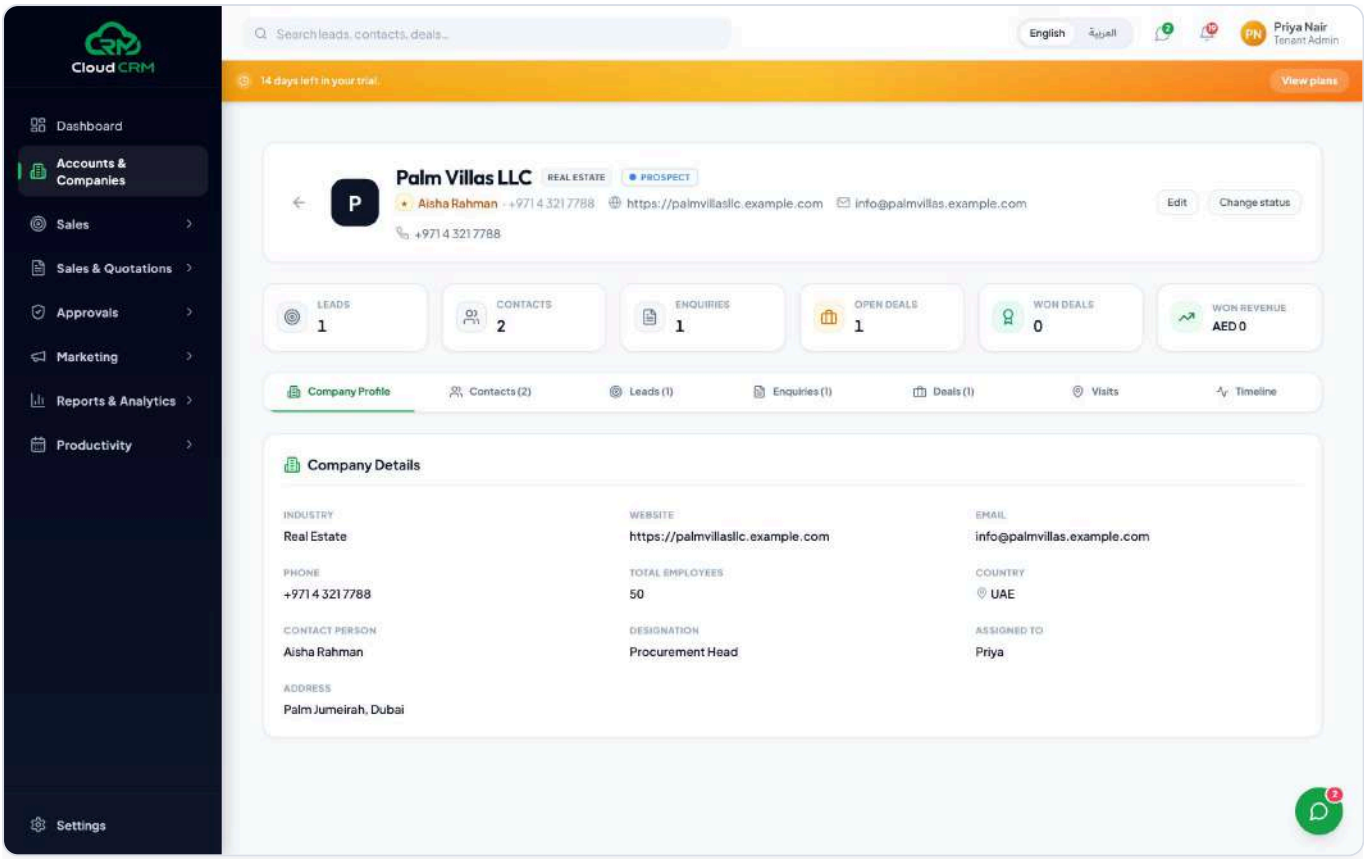
Every customer business has one master account. Its record gathers that company's contacts, leads, enquiries, deals, visits and timeline, so anyone on the team can understand the full relationship in seconds.



Accounts list with industry, contact, salesperson and status

Before & After

BEFORE	AFTER, WITH CLOUDCRM
Customer information was spread across sales reps' files.	**One account page shows contacts, leads, enquiries, deals, visits and history together.**
Nobody knew a customer had unpaid bills or a dispute.	**Company statuses such as *Blacklisted* or *On Hold* show a warning before anyone starts new business.**
Account value was worked out by hand.	**Won revenue and open deals are counted automatically on the account.**



Company page: key numbers and tabs for Profile, Contacts, Leads, Enquiries, Deals, Visits and Timeline

Everything included

- ✓ **New Account** form: name, industry, website, email, phone, address, country, employee count and contact person, who becomes a contact automatically.
- ✓ **Search and filters** by status and salesperson.
- ✓ **Company page** with tiles for Leads, Contacts, Enquiries, Open Deals, Won Deals and Won Revenue.
- ✓ Tabs: **Company Profile · Contacts · Leads · Enquiries · Deals · Visits · Timeline**.
- ✓ **Change status** using your own company statuses (Active, Prospect, On Hold, Closed, Fraud, Blacklisted, or your own).
- ✓ **Warning banner** on accounts whose status is marked "warn before new business".
- ✓ Schedule a **visit** directly from the company.

How to create a customer account

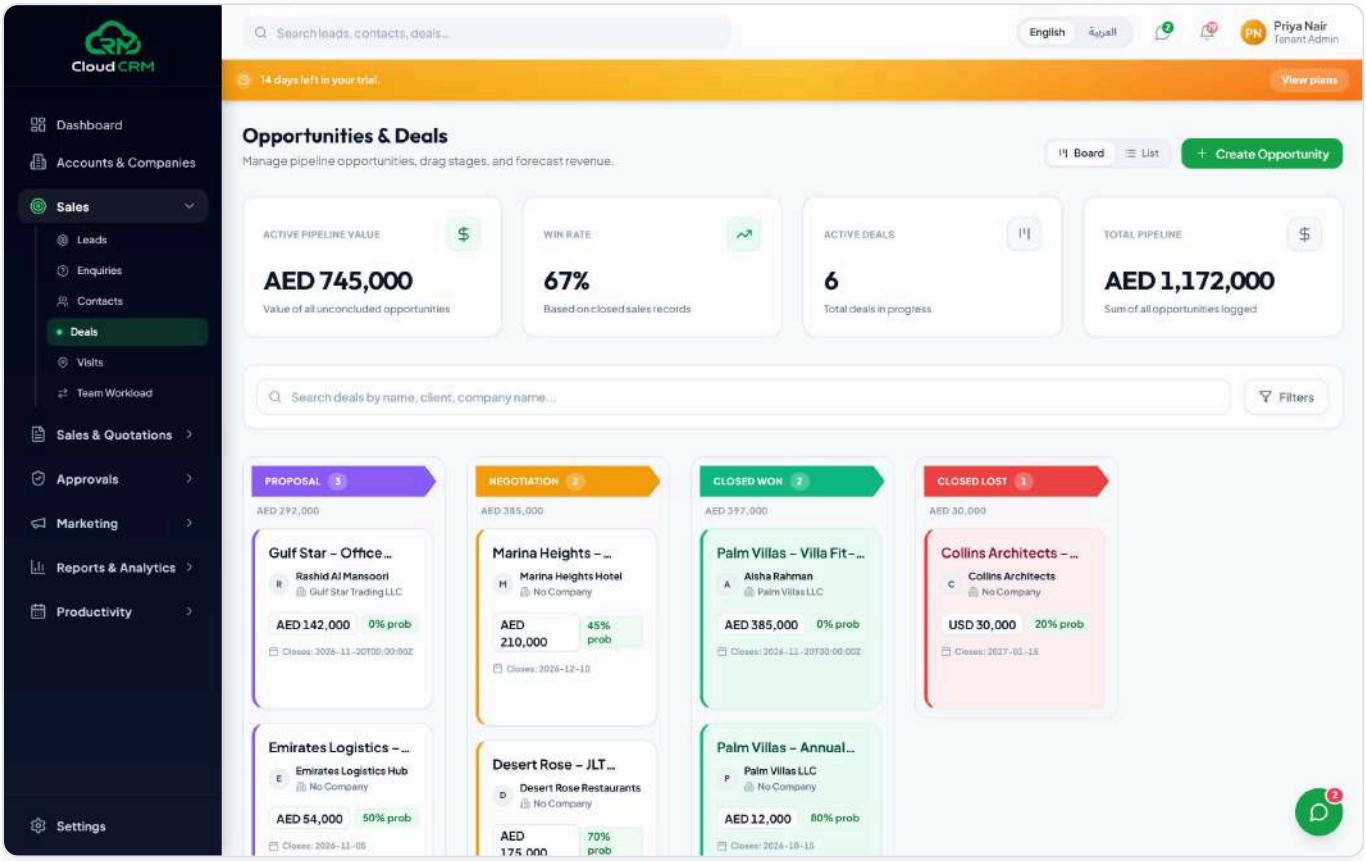
1. Open **Accounts & Companies** and click `New Account`.
2. Enter the company details and the main contact person.
3. Save. The account and its first contact are created.
4. Open the account to add leads, schedule visits or change its status.

06 Deals

Menu → Sales → Deals

Overview

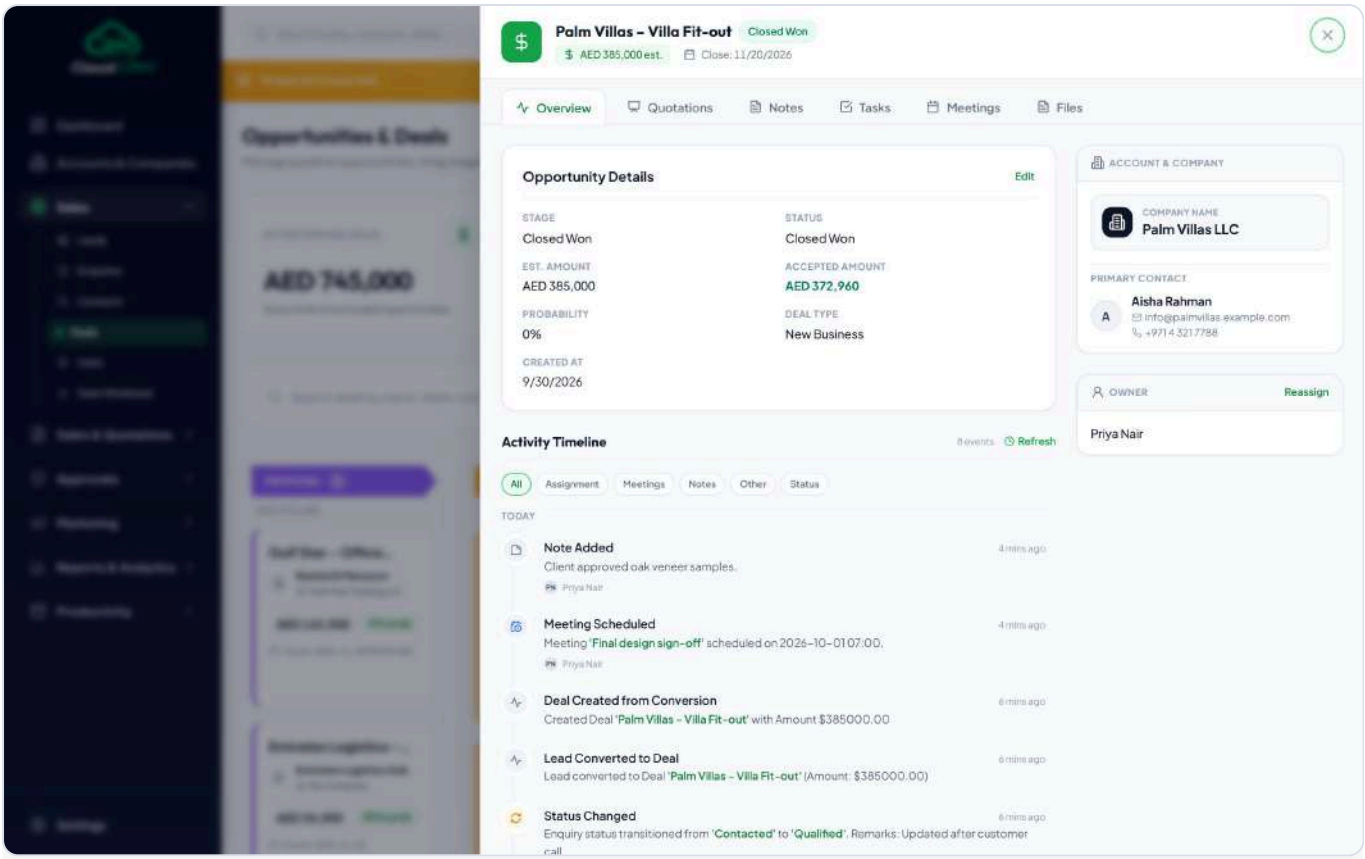
Deals shows every sales opportunity on a colour-coded pipeline board, with live totals, win rate and forecasts. Each deal has its own workspace holding its quotations, notes, tasks, meetings, files and a full activity history.



Pipeline board: one column per stage, with value totals and win probability

Before & After

BEFORE	AFTER, WITH CLOUDCRM
The pipeline lived in a spreadsheet updated once a week.	**A live board whose totals update as you move cards.**
"Which quote did the client agree to?" meant searching through email.	**The accepted quotation is attached to the deal and marks it as Won automatically.**
Forecasts were added up by hand across currencies.	**Pipeline value and win rate are calculated automatically in your reporting currency.**
When a rep left, their threads had to be forwarded one by one.	**Reassign a deal in one click, with the history kept.**



Deal workspace: details, account, owner and the activity timeline

Everything included

- ✓ **Board** and **List** views. Cards show the client, company, amount, win % and close date.
- ✓ Move cards between stages. Moving a deal **backwards asks for confirmation**.
- ✓ KPI tiles: **Active Pipeline Value, Win Rate, Active Deals, Total Pipeline**.
- ✓ **Multi-currency**: totals are converted with your exchange rates.
- ✓ Search by deal, client or company name, and **filter** by stage or salesperson.
- ✓ **Your own stages** (default: Qualification, Proposal, Negotiation, Closed Won, Closed Lost), with your colours.
- ✓ **Protected Closed Won**: a deal is won only when the customer accepts a quotation, and the accepted amount is recorded.
- ✓ Deal types: New Business, Renewal, Upsell, Cross-sell, Partnership.
- ✓ New business deals are created by **converting a qualified enquiry**, so they stay linked to the lead, contact and company.
- ✓ Workspace tabs: **Overview · Quotations · Notes · Tasks · Meetings · Files**.
- ✓ **Reassign** the owner instantly. The change is recorded in the timeline.
- ✓ **Access control**: each role sees all deals or only its own.

How to move a deal through the pipeline

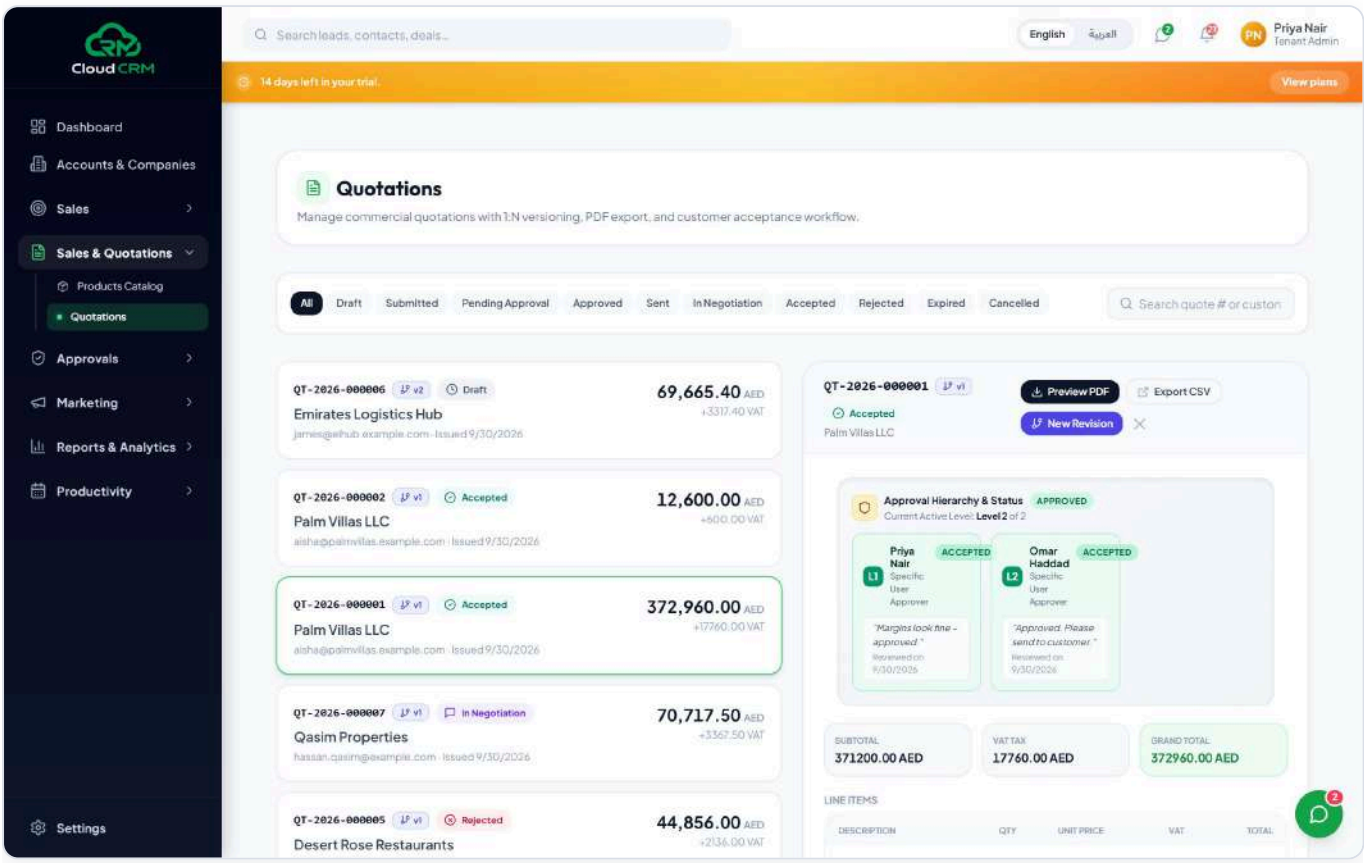
1. Open **Sales → Deals** and stay on `Board`.
2. Hover over a card and click the arrow to move it to the next stage.
3. Click the card to open the workspace, then use `Edit` to update the amount or probability.
4. On the **Quotations** tab, create the quote and get it approved and accepted. The deal moves to **Closed Won** by itself.

07 Quotations

Menu → Sales & Quotations → Quotations

Overview

Build professional quotations with VAT calculated for you, directly from your product catalog. Every revision is kept, quotes go through approval, and each one can be shared as a PDF. When the customer accepts, the deal closes as Won automatically.



Quotations list with status filters, and a quotation's approval chain and totals

Before & After

BEFORE	AFTER, WITH CLOUDCRM
Quotes were typed in Word or Excel, with VAT worked out by hand.	**Lines come from the catalog, with VAT and totals calculated automatically.**
Files ended up named "Quote_final_v3_REAL.docx".	**Numbered quotes (QT-2026-000001) with a full version history and a reason for each change.**
Approval was chased over email or WhatsApp.	**An in-system approval chain with notifications.**
PDFs were emailed by hand.	**One-click PDF, plus an automatic email to the customer.**
Someone had to update the pipeline after the customer said yes.	**Accepting the quote closes the deal as Won.**

Everything included

- ✓ **Automatic quote numbers**, sequential per company.
- ✓ **Pick from catalog**: fills in the item code, name, price and VAT. A customer's **special price** is applied automatically.
- ✓ Quantity, unit price and **discount %** on each line, with VAT per line (5% UAE VAT by default).
- ✓ **Live totals**: subtotal, VAT and grand total.
- ✓ Currency (AED, USD, EUR), validity in days, notes, and terms & conditions.
- ✓ **Revisions** (v1 → v2 → v3) with a change log. Approved and accepted quotes are locked.
- ✓ **Status flow**: Draft → Submitted → Pending Approval → Approved → Sent to Customer → In Negotiation → Customer Accepted, plus Rejected, Expired and Cancelled.
- ✓ **Multi-level approval** shown on the quote, where approvers can act directly.
- ✓ **Automatic email** to the customer when a quote is sent and when it is accepted (requires your company email to be set up).
- ✓ **Preview PDF** and **Export CSV**.
- ✓ Quotes are linked to a Deal, Lead or Enquiry and appear on its **Quotations** tab.

How to quote a deal

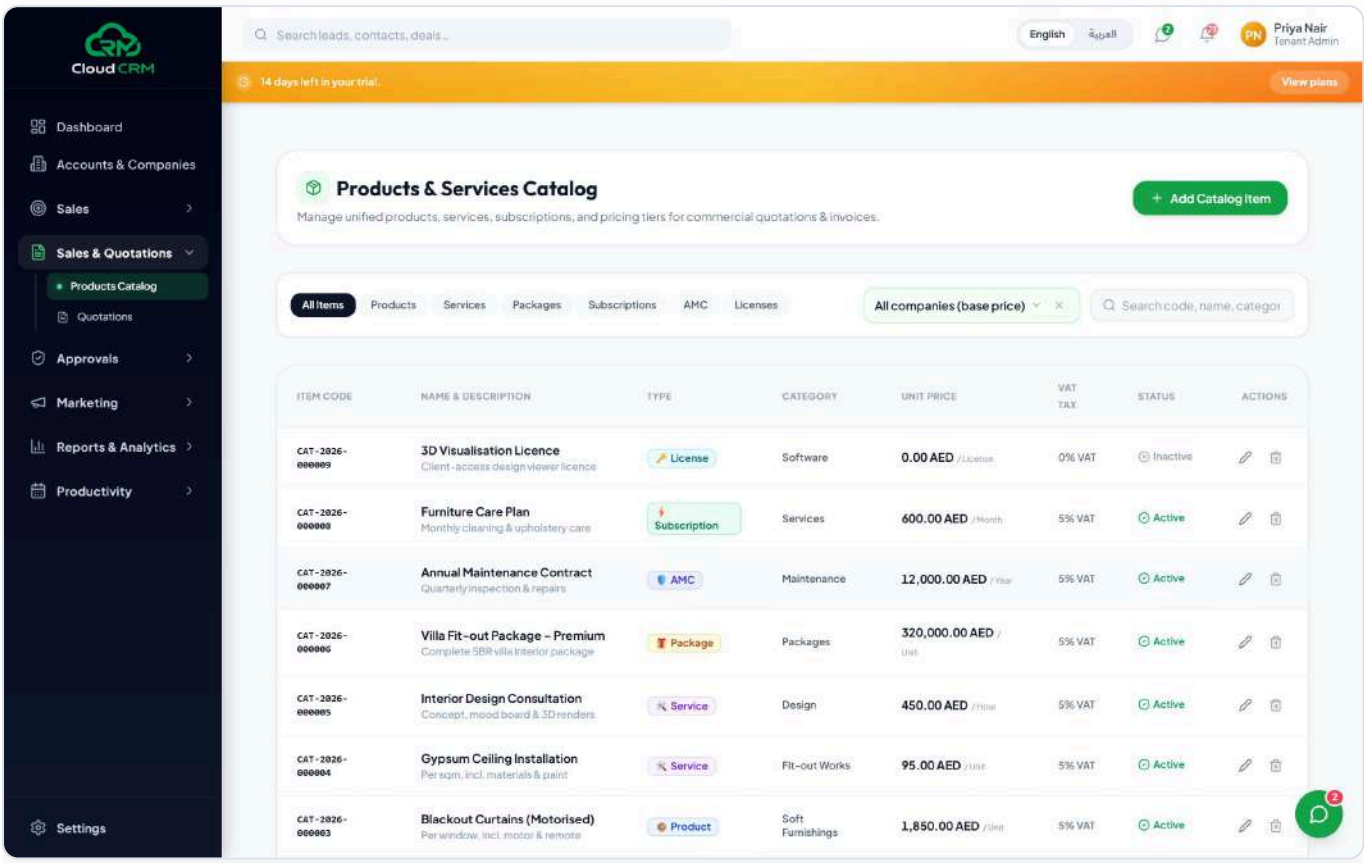
1. Open the deal and go to the **Quotations** tab. Click `New Quotation`.
2. Choose products from **Pick from catalog…** and set the quantity and discount.
3. Check the totals, add terms, and click `Create Quotation (v1)`.
4. Click `Send for Approval`.
5. Once it is approved, choose `Send to Customer` from **Actions**. When the customer agrees, click `Accept`.

08 Products Catalog

Menu → Sales & Quotations → Products Catalog

Overview

The catalog is one list of everything you sell: products, services, packages, subscriptions, maintenance contracts and licences, each with its price, unit and VAT rate. Special prices for particular customers are stored here too, and applied automatically on their quotations.



Catalog with item types, categories, prices, VAT and status

Before & After

BEFORE	AFTER, WITH CLOUDCRM
A price-list spreadsheet was emailed around, and old copies stayed in use.	**One live catalog for the whole team.**
Only one sales rep remembered a customer's special price.	**Special prices are stored per company and applied automatically.**
Product names and prices were retyped into every quote.	**Pick items straight from the catalog.**
The VAT rate was guessed item by item.	**The VAT rate is stored on each item.**

Everything included

- ✓ Item types: **Product, Service, Package, Subscription, AMC, License**, with filter buttons for each.
- ✓ **Automatic item codes** (CAT-2026-000001).

- ✓ Category, unit of measure (Unit, Hour, Month, Year, License), VAT %, description, and Active/Inactive status.
- ✓ **Company-specific pricing**: override the price for chosen customers, while everyone else pays the base price.
- ✓ **Company price filter**: see the whole catalog as a particular customer would be charged.
- ✓ Separate permissions to view, create, edit and delete items.

How to add a product with a special customer price

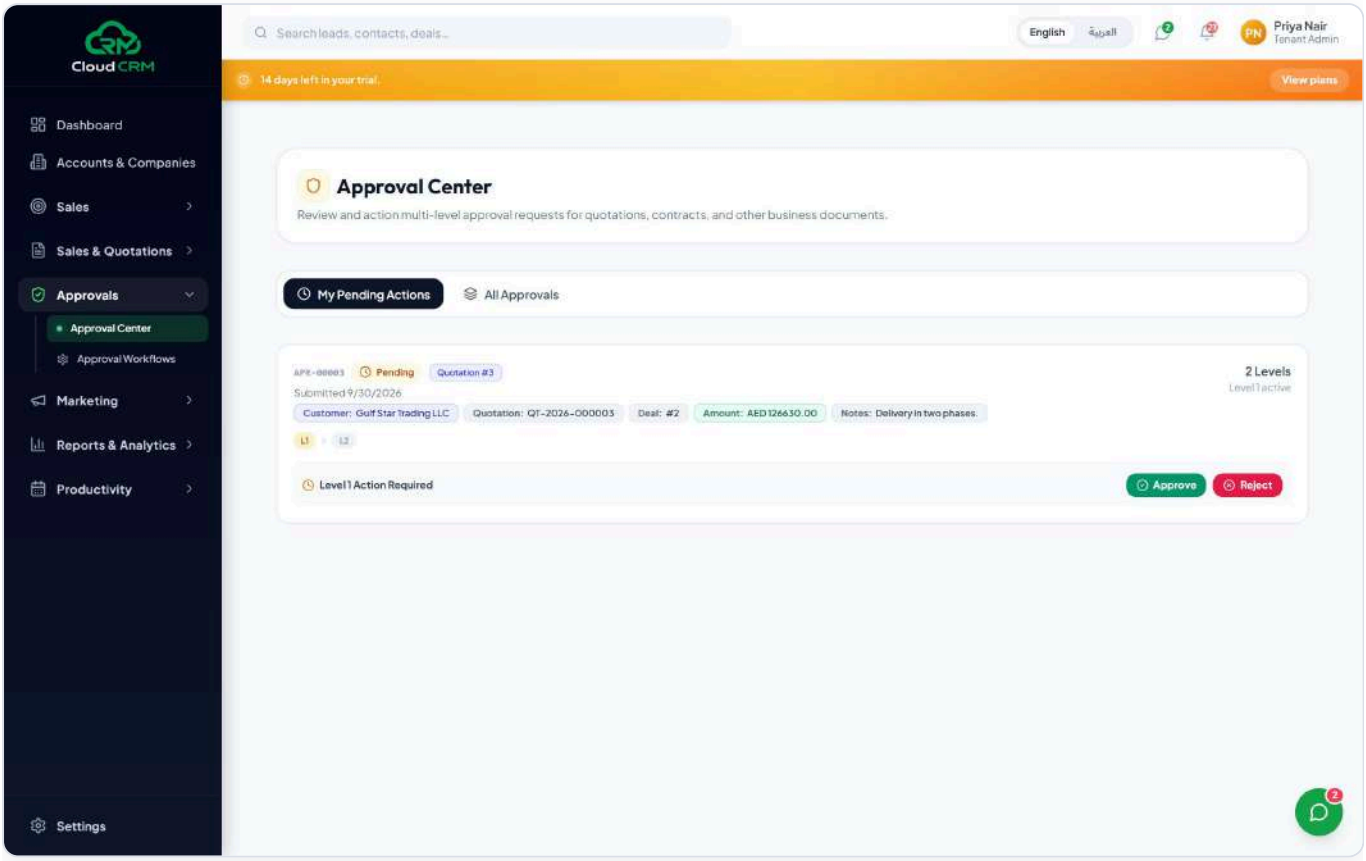
1. Open **Products Catalog** and click `Add Catalog Item`.
2. Enter the name, type, category, unit price, unit and VAT %, then click `Create Item`.
3. Click the item's row, search for the company, enter its price, and click `Add`.

09 Approvals

Menu → Approvals

Overview

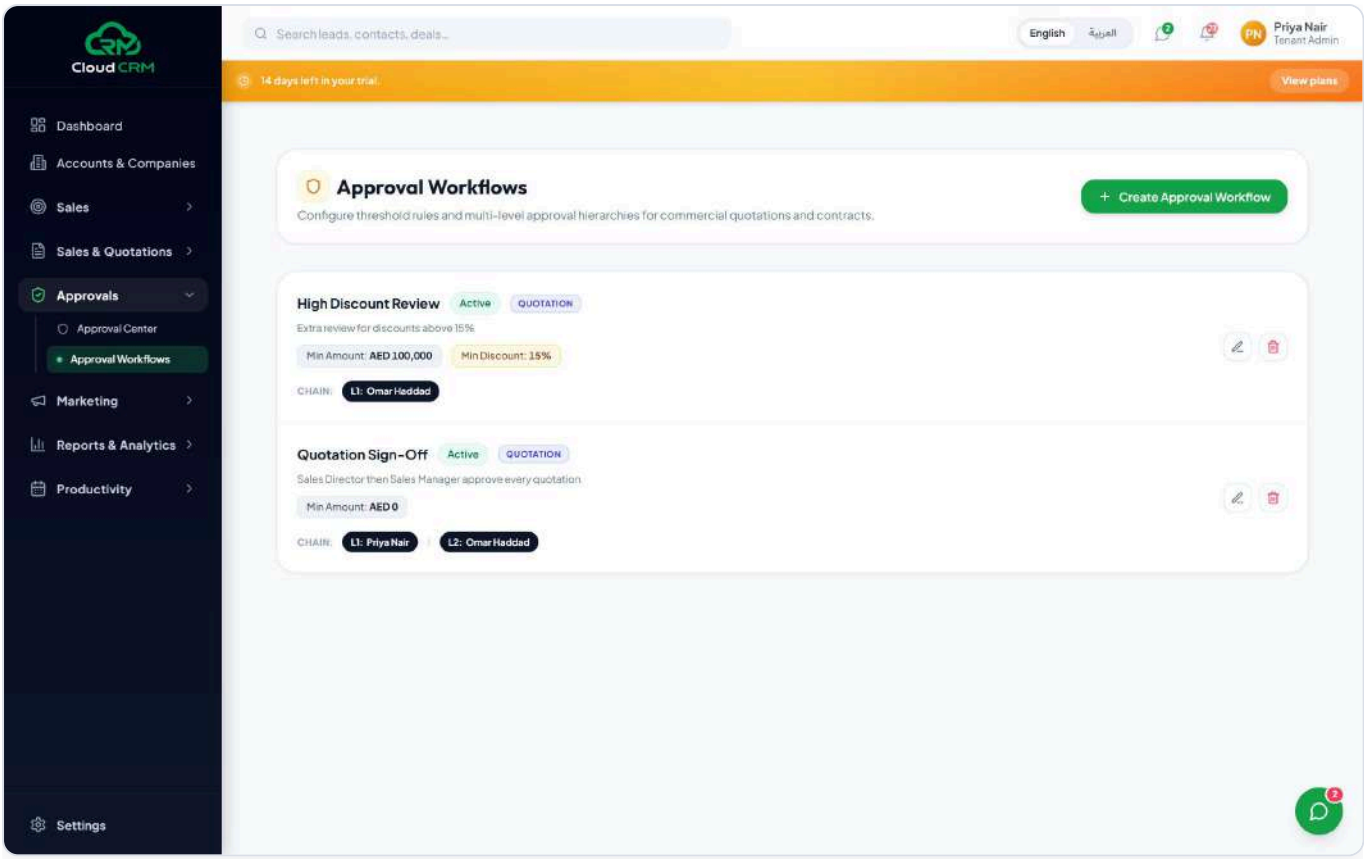
Decide who must sign off on quotations, and in which order. Approvers are notified, act from the Approval Center or directly on the quote, and the quote's status updates automatically.



Approval Center: your pending actions, with Approve and Reject

Before & After

BEFORE	AFTER, WITH CLOUDCRM
"Can you OK this discount?" emails got lost.	**A structured request with the customer, quote, deal and amount.**
There was no record of who approved what.	**An approval chain with names, decisions, comments and dates.**
Managers had to hunt through their inbox for requests.	**A My Pending Actions list, plus notifications.**
Each manager applied different sign-off rules.	**Sign-off rules set up once and applied to every quotation.**



Approval Workflows: multi-level approver chains

Everything included

- ✓ **Multi-level chains** (L1 → L2 → L3…). Each level becomes active once the previous level approves.
- ✓ Approvers can be a **specific person** or a **role**.
- ✓ Rules for minimum quote amount and minimum discount %, which can be switched on or off.
- ✓ **In-app and email notifications** to the approvers of each level.
- ✓ Request references (APR-00012) showing the customer, quote number, deal and amount.
- ✓ **Comments** on every decision, with timestamps.
- ✓ Full approval marks the quote **Approved**. Any rejection marks it **Rejected**.
- ✓ Only the assigned approver sees the Approve and Reject buttons.
- ✓ If no workflow is set up, CloudCRM asks before approving a quote directly, and records the choice.

How to set up two-level approval

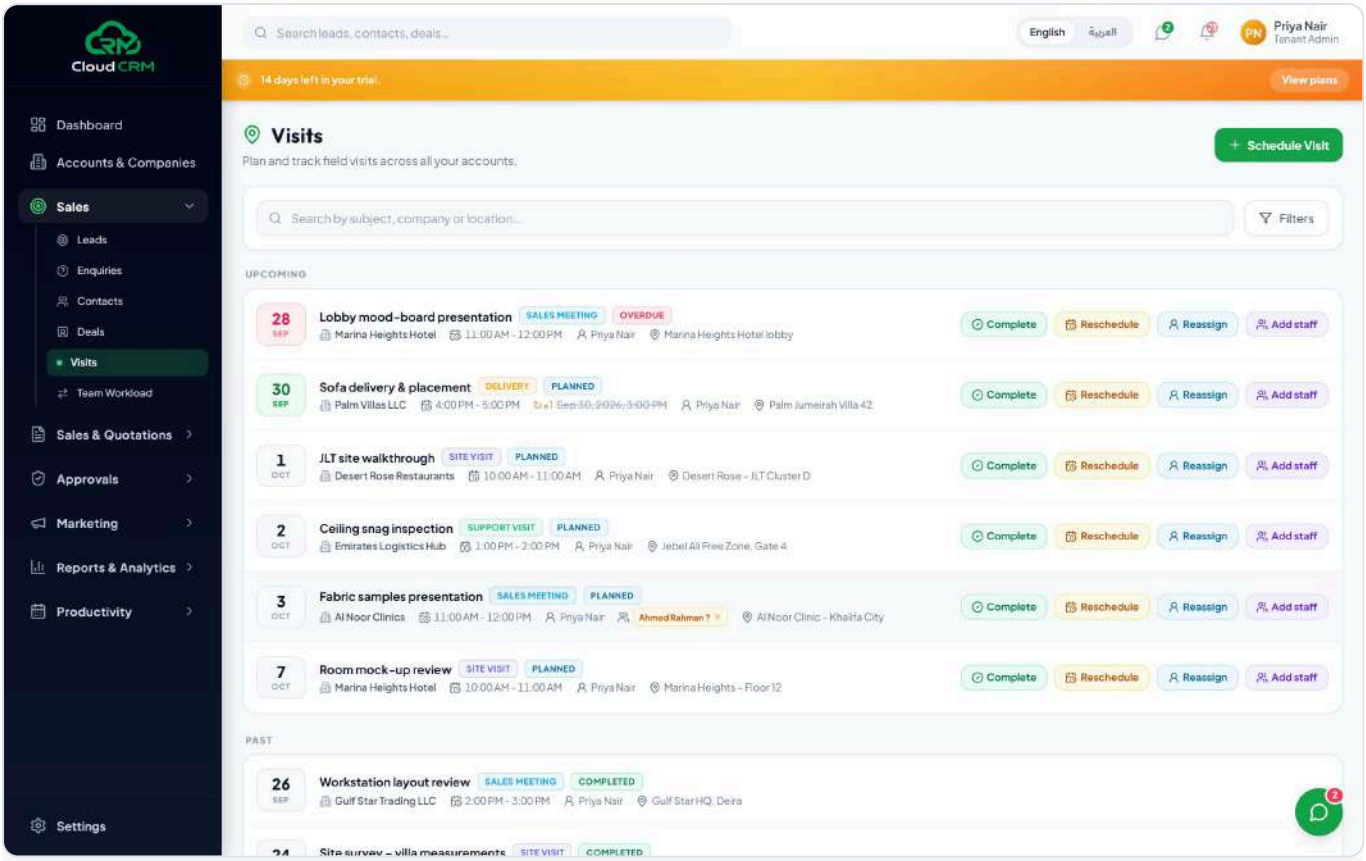
1. Open **Approvals** → **Approval Workflows** and click `Create Approval Workflow`.
2. Name it, set the minimum amount or discount, and leave it Active.
3. For Level 1, choose **By Specific User** (for example, the Sales Manager). Click `Add Level` and set Level 2 (for example, the Director).
4. Click `Save Approval Workflow`. Quotes sent for approval now go to Level 1 first.

10 Visits

Menu → Sales → Visits

Overview

Visits plans and records your team's trips to customer sites. Everyone knows who is going where and when, what happened, and whether the visit turned into new business. A good visit becomes an enquiry in one click.



Visits agenda: upcoming and past visits, with Complete, Reschedule, Reassign and Add staff

Before & After

BEFORE	AFTER, WITH CLOUDCRM
Field visits were planned on WhatsApp, and the manager didn't know who was where.	**Every visit is scheduled with a company, time, owner and location, on a shared agenda and calendar.**
Two reps got booked for the same slot.	**A clash warning appears before you save.**
"What happened at the visit?" got lost in a voice note.	**Completing a visit records its outcome, with notes and files attached.**
Postponements and handovers happened without anyone knowing.	**Reschedules and reassignments need a reason and acceptance, and are kept in the history.**
Good visits never became tracked opportunities.	**Convert to Enquiry creates a numbered enquiry in one click.**

Everything included

- ✓ **Schedule Visit**: company (or create one on the spot), one or more assignees, title, **visit type**, date, start and end time, contact person, location and purpose.
- ✓ Your own **visit types** with colours (Site Visit, Sales Meeting, Delivery, Support Visit…).
- ✓ **Scheduling clash warning** before double-booking.
- ✓ Agenda with **Upcoming** and **Past** sections, today highlighted, and red **Overdue** badges.
- ✓ Status tabs: All, Planned, Completed, Cancelled.
- ✓ **Complete** with a visit outcome.
- ✓ **Reschedule** with a reason. Every change is kept in the schedule history (↻ ×N).
- ✓ **Reassign** with approval: the new owner accepts or rejects.
- ✓ **Add staff**: extra team members join or decline the visit.
- ✓ **Convert to Enquiry**: the resulting enquiry is numbered with source "Visit", and the visit is then locked.
- ✓ Each visit has **Notes, Tasks, Meetings, Files and Timeline** tabs.
- ✓ Visits appear on the **Calendar** and the Dashboard.

How to schedule and complete a visit

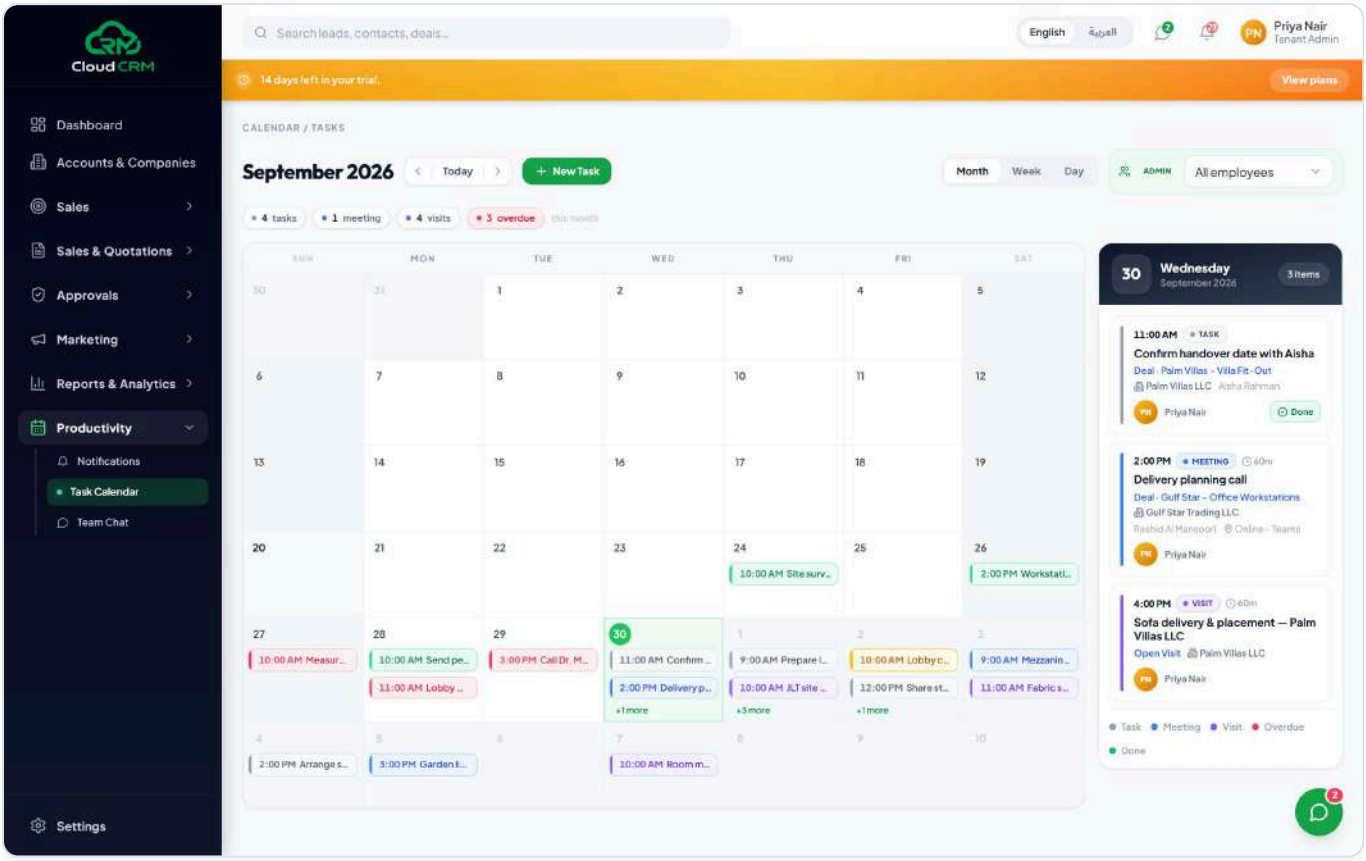
1. Go to **Sales** → **Visits** and click `Schedule Visit`.
2. Pick the company, choose who is going, and enter the title and visit type.
3. Set the date, start and end time, location and purpose, then save.
4. After the visit, click `Complete` on its row and type the outcome.
5. If there is new business, open the visit and click `Convert to Enquiry`.

11 Calendar & Tasks

Menu → Productivity → Task Calendar

Overview

The Calendar is each person's single agenda. It shows the tasks, meetings and customer visits from across CloudCRM in a month, week or day view. Managers can switch between team members to see who is doing what.



Month view with tasks, meetings and visits, and the selected day's agenda on the right

Before & After

BEFORE	AFTER, WITH CLOUDCRM
Tasks lived in a notebook, meetings in a personal calendar, and visits on WhatsApp.	**One calendar shows all three for each person.**
Follow-ups were forgotten.	**Reminders before the due time (with optional repeats) and red Overdue markers.**
Managers phoned around to find out what the team was doing today.	**The employee filter shows any team member's day, week or month.**
A task had no link to the customer it was about.	**Every task is linked to an enquiry, deal or visit, and appears on its timeline.**

Everything included

- ✓ **Month, Week and Day** views, with Previous / Today / Next.
- ✓ Monthly totals: tasks, meetings, visits and overdue items.

- ✓ Click any item for its details: company, time, location, organiser, invitees and their replies, notes, and what it is linked to.
- ✓ **New Task**: link it to an enquiry, deal or visit, then set the title, date and time and one or more assignees.
- ✓ **Reminders** 15 min, 30 min, 1 h, 2 h or 1 day before, with optional repeats. Reminders arrive in the app and by email.
- ✓ **Schedule Visit** from the same dialog.
- ✓ **Mark as Complete** from the task pop-up.
- ✓ **Recurring meetings** appear on each date.
- ✓ Administrators get an **employee filter** to view any colleague's calendar.
- ✓ Cancelled items are hidden, so the calendar stays clean.

How to add a task from the calendar

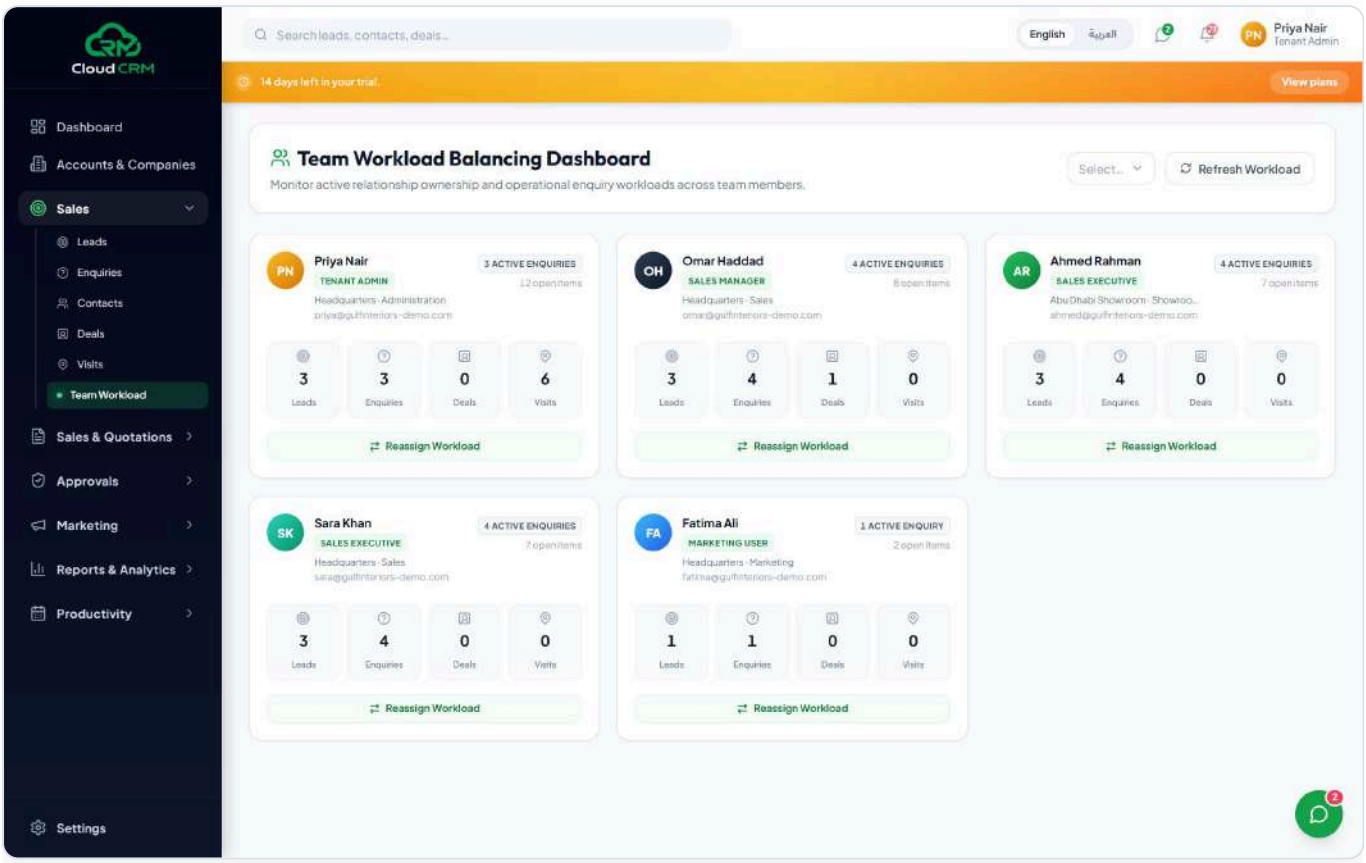
1. Open **Productivity** → **Task Calendar** and pick Month, Week or Day.
2. Click **New Task** and keep ✓ **Task** selected.
3. Under "Task for", choose Enquiry, Deal or Visit and search for the record.
4. Enter the title, date, time and assignee. Switch on **Send reminders** if you want them.
5. Click **Create Task**. It appears on the calendar and on the record's timeline.

12 Team Workload

Menu → Sales → Team Workload

Overview

Team Workload shows how many leads, enquiries, deals and visits each salesperson is handling. It lets managers spot overloaded team members and move work to someone with more capacity, in a controlled way.



One card per team member, with active work and a Reassign Workload button

Before & After

BEFORE	AFTER, WITH CLOUDCRM
One rep drowned in work while another was idle, and nobody noticed.	**Live counts per person show the imbalance immediately.**
Handing work over meant re-sending emails and files.	**Reassign a lead, enquiry or visit with a reason. Linked items move with it.**
Leave and resignations left customers unattended.	**A manager can move a person's open work to a colleague in minutes.**

Everything included

- ✓ One card per person with their role, branch and department, and counts of **Leads, Enquiries, Deals and Visits**.
- ✓ Filter by salesperson, and **Refresh Workload**.
- ✓ **Reassign Workload**: choose Lead, Enquiry or Visit, the record, the new assignee and a reason. Open enquiries can be moved along with a lead.
- ✓ Every reassignment is recorded in the record's history.

How to rebalance work

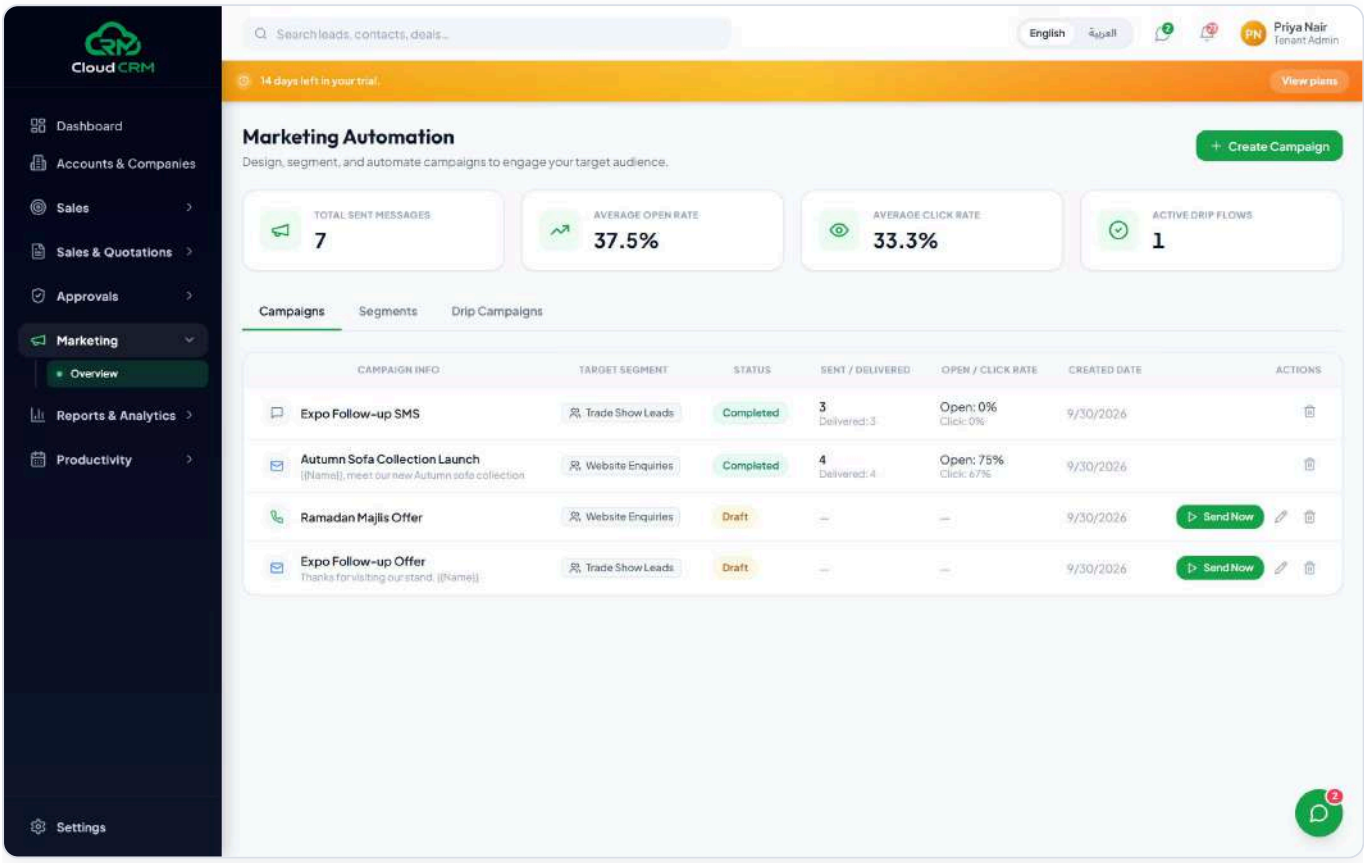
1. Open **Sales → Team Workload**.
2. Find the person with too much work and click **Reassign Workload**.
3. Choose the record type and the record, then the new assignee.
4. Enter a reason and click **Execute Reassignment**.

13 Marketing

Menu → Marketing → Overview

Overview

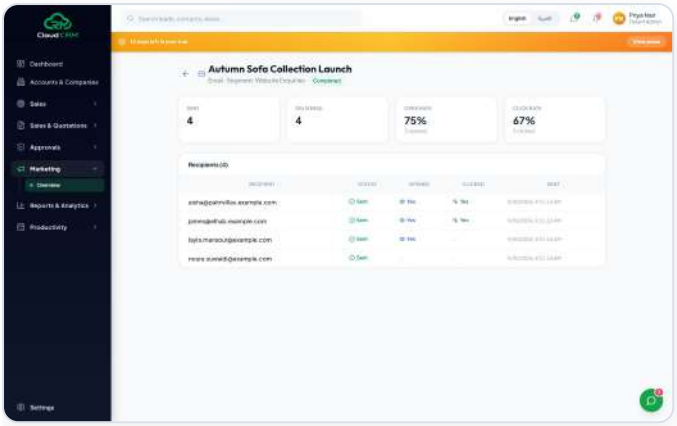
Marketing lets you reach the right leads with the right message by Email, SMS or WhatsApp, without a separate marketing tool. Build a target audience (a *segment*), send a personalised campaign in a few clicks, and see exactly who opened and clicked. *Drip campaigns* then follow up automatically over several days, and every open or click raises the lead's score so sales knows who is warm.



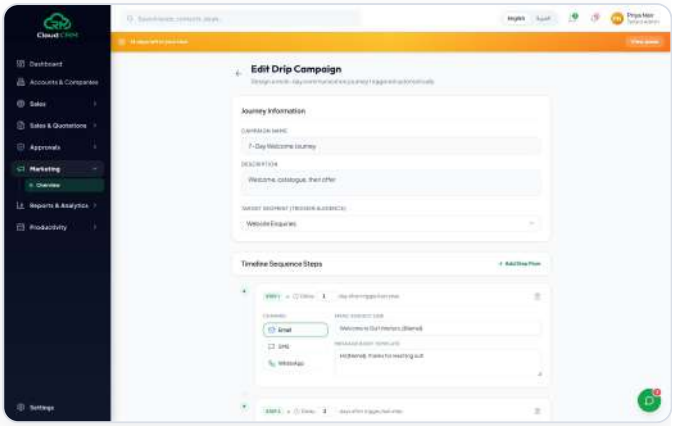
Marketing Automation: sent messages, open and click rates, active drips and your campaigns

Before & After

BEFORE	AFTER, WITH CLOUDCRM
800 leads, and no idea who to email.	**Build a segment such as "Trade Show leads" and see the exact count before sending.**
Lists were exported into a separate email tool.	**Email, SMS and WhatsApp go out from inside CloudCRM, under your own brand.**
Mass emails were sent blind.	**You see who opened and who clicked, and pass them to sales.**
Follow-ups were forgotten when you got busy.	**Drip sequences (Day 0 welcome, Day 3 catalogue, Day 7 offer) run on their own.**
Every lead looked the same.	**Opens and clicks raise the score, and Hot, Warm and Cold badges show who to call first.**



Campaign results: sent, delivered, open and click rates for each person



Drip campaign: timed steps across Email, SMS and WhatsApp

Everything included

- ✓ **Segments** by lead status or lead source. **Check Matches** shows the exact number of matching leads before you save.
- ✓ **Campaign builder** in 3 steps (Configuration → Content → Review) for **Email, SMS or WhatsApp**, with desktop and phone previews.
- ✓ **Personalisation** with {{Name}}, {{Email}} and {{Phone}}.
- ✓ **Send Now**, with live status: Draft → Sending → Completed.
- ✓ **Delivery log** for every recipient (Sent / Failed).
- ✓ **Open and click tracking** on emails, so open and click rates are real numbers.
- ✓ **Campaign detail page** with stat cards and a table of every recipient.
- ✓ **Drip campaigns**: multi-step journeys with a delay in days between steps. **Activate or Pause** at any time. New leads that match are enrolled automatically.
- ✓ **One-click unsubscribe** in every marketing email. People who opt out are skipped from then on.
- ✓ **Engagement scoring**: +2 for an open and +5 for a click, feeding the Hot / Warm / Cold badges in Leads.
- ✓ Sends through **your own channels**: your email server, and Twilio for SMS and WhatsApp (see chapter 18).
- ✓ Separate permissions to view, create, edit, delete and send.

How to send your first email campaign

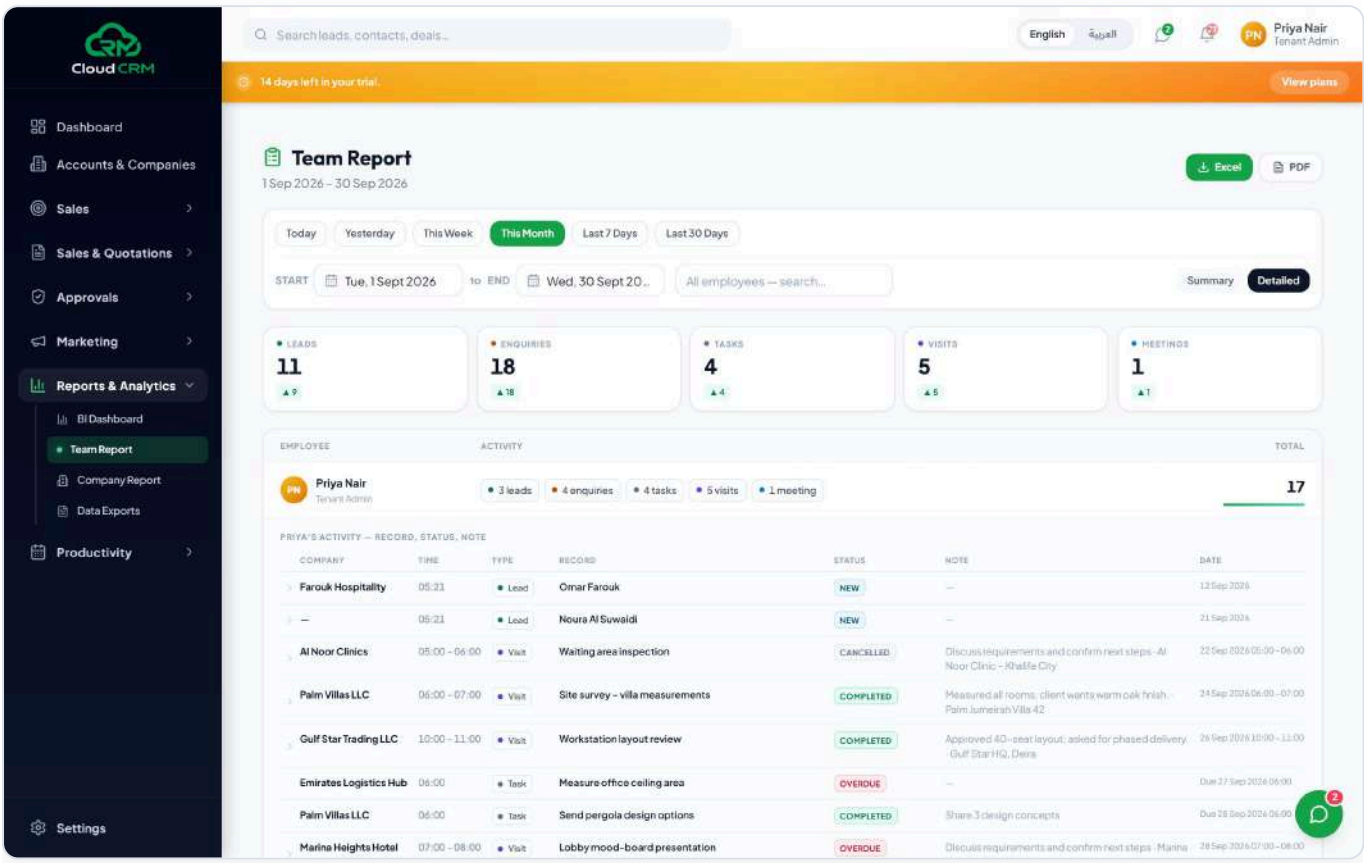
1. Set up your email under **Settings** → **Communication Channels** and click `Send Test`.
2. In **Marketing** → **Overview**, open **Segments**, click `Create Segment`, add a rule (for example, Lead Source equals "Trade Show"), click `Check Matches`, then `Save Segment`.
3. Open **Campaigns** and click `Create Campaign`. Choose **Email Marketing** and your segment, then click `Continue`.
4. Write the subject and message, using {{Name}} to personalise it. Check the preview and click `Save Campaign`.
5. Click `Send Now`, then open the campaign to see who opened and clicked.

14 Reports & Analytics

Menu → Reports & Analytics

Overview

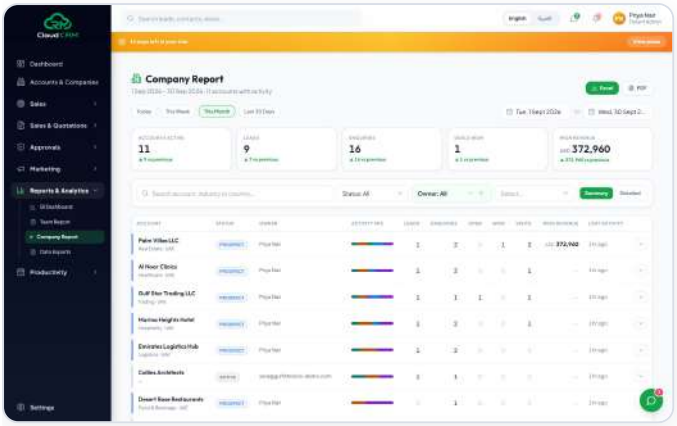
Reports turn everyday CRM work into answers: how your pipeline and quotations are moving, which accounts are active, and what each team member did today. Every report can be downloaded as a formatted Excel file or a PDF with your logo.



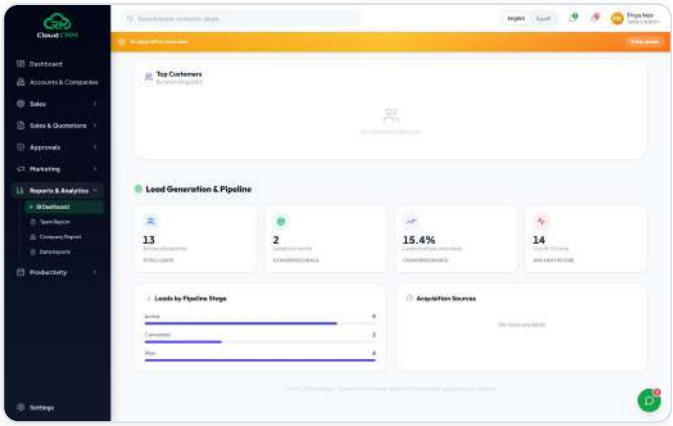
Team Report: each person's leads, enquiries, tasks, visits and meetings for the chosen period

Before & After

BEFORE	AFTER, WITH CLOUDCRM
The end-of-day report was a WhatsApp message from each rep.	**The Team Report shows every rep's leads, visits, tasks and meetings automatically.**
"Which accounts are active?" meant digging through records.	**The Company Report ranks accounts by activity and won revenue, compared with the previous period.**
Exported spreadsheets needed reformatting before they could be shared.	**One-click Excel with fitted columns, or a branded PDF.**
Totals mixed several currencies.	**Everything is converted into your reporting currency.**



Company Report: activity and won revenue per account



BI Dashboard: the lead generation and pipeline section

Everything included

- ✓ **BI Dashboard**: open quotations, pending approvals, win rate, quotation funnel, approvals, top customers, and a lead generation and pipeline section (conversion rate, average heat score, leads by stage, acquisition sources). One-click **Refresh**.
- ✓ **Team Report**: presets for Today, Yesterday, This Week, This Month, Last 7 or 30 Days, or your own dates. **Summary** or **Detailed** view, and each person's activity can be expanded.
- ✓ Team Report meeting rows show each person's own reply (Pending or Declined). Times follow your company time zone.
- ✓ **Company Report**: accounts active, leads, enquiries, deals won and won revenue, each compared with the previous period. Filters by status, owner and industry.
- ✓ **Data Exports**: five ready-made reports (Sales Pipeline, Lead Performance, Team Activity, Account Health, Quotations). Choose which columns to show.
- ✓ **Excel export** with bold headings, fitted columns, a frozen header row and filters.
- ✓ **PDF export** with your company logo, summary tiles and page numbers.
- ✓ Administrators can report on anyone. Everyone else sees their own activity.

How to send your manager this week's team activity

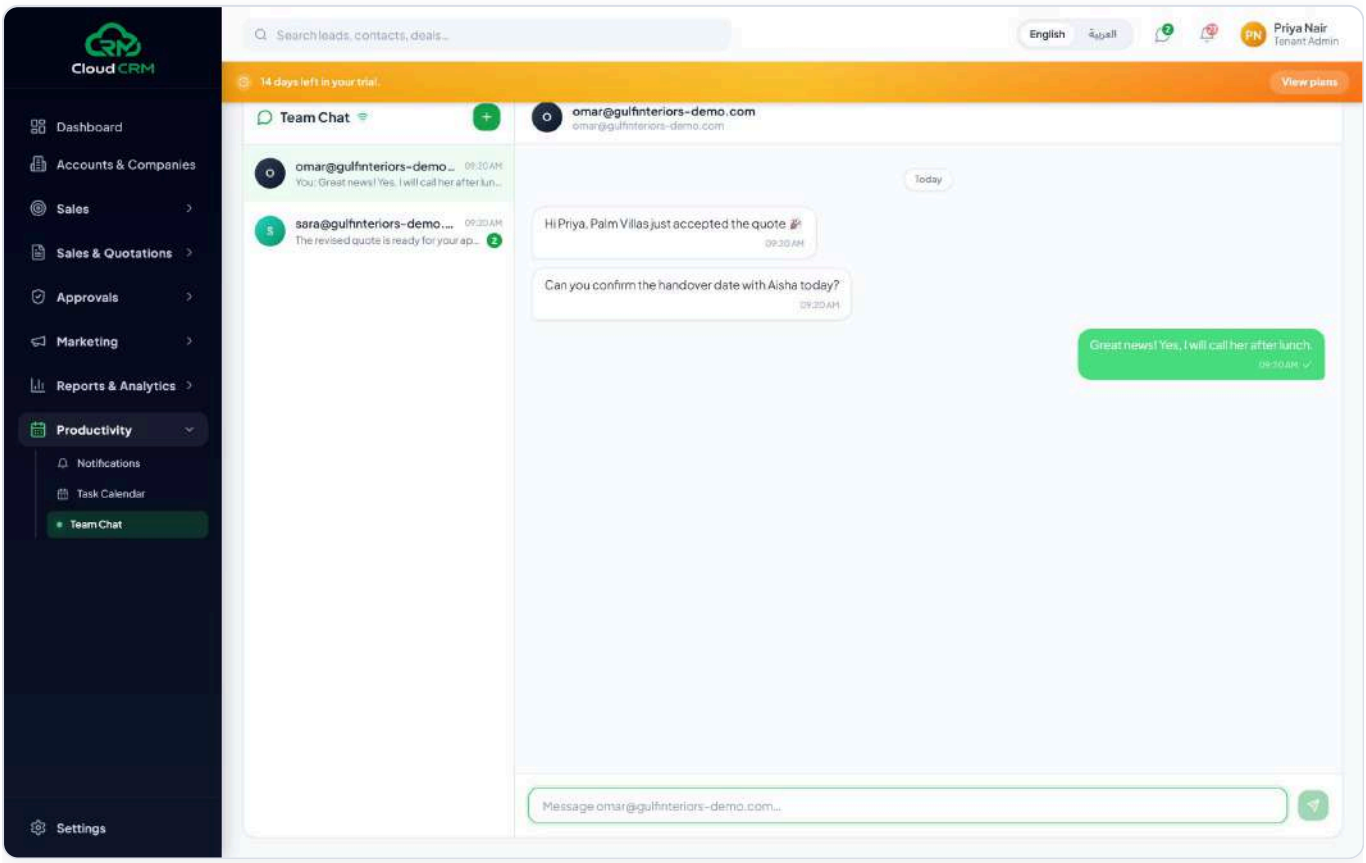
1. Go to **Reports & Analytics** → **Team Report**.
2. Click **This Week**, or choose Start and End dates.
3. Optionally pick one employee (administrators only), then choose **Summary** or **Detailed**.
4. Click **PDF** or **Excel** to download the report and share it.

15 Team Chat

Menu → Productivity → Team Chat

Overview

Team Chat is private one-to-one messaging between colleagues, built into CloudCRM. Messages arrive instantly, and you can see when someone is typing and when they have read your message. You can reply from any screen without losing your place in a lead or deal.



Conversations on the left, messages grouped by day, and read ticks

Before & After

BEFORE	AFTER, WITH CLOUDCRM
Quick questions went through personal WhatsApp, mixing work and personal life.	**Work chat stays inside your company's CRM.**
Switching apps meant losing your place in a lead.	**The floating chat window opens on top of any screen.**
"Did they see my message?"	**Delivered and Read ticks, plus a typing indicator.**

Everything included

- ✓ **Real-time** one-to-one messages with colleagues in your company only.
- ✓ Conversation list with the last message and an **unread count**.
- ✓ **Typing indicator** and **read receipts** (✓ delivered, ✓✓ read).
- ✓ Messages grouped under **Today**, **Yesterday** or the date.
- ✓ **Floating chat launcher** at the bottom right of every page. Your unfinished draft is kept as you move between pages.
- ✓ Unread badges on the launcher and in the top bar.

- ✓ Reconnects automatically after a network drop.
- ✓ Mobile layout, and permissions to control who can read and send.

How to message a colleague

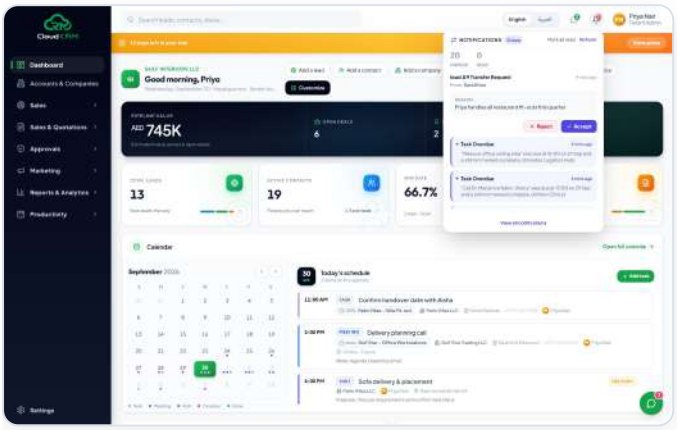
1. Click the chat bubble at the bottom right, or go to **Productivity → Team Chat**.
2. Click `+` (Start new chat) and search for your colleague's name.
3. Type your message and press `Send`. A double tick means it has been read.

16 Notifications

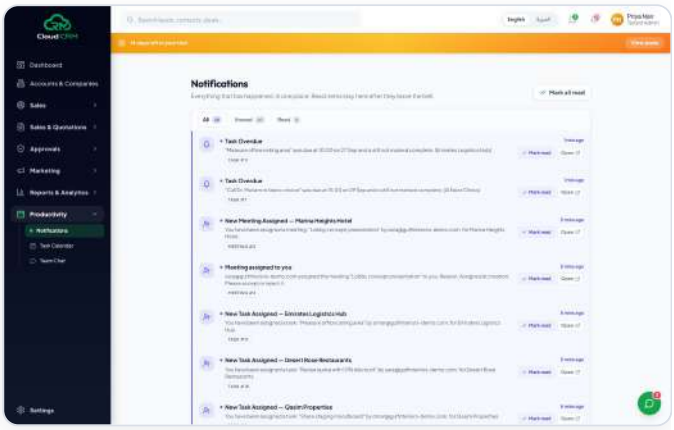
Top bar bell · Productivity → Notifications

Overview

Notifications tell you the moment something needs you: a lead or task assigned to you, a meeting invite, a transfer request, an approval, or a task that is due. They arrive live with a short chime, you can act on many of them straight from the bell, and the full history stays on the Notifications page.



The bell: accept or reject requests without leaving the page



Notifications page with All, Unread and Read tabs

Before & After

BEFORE	AFTER, WITH CLOUDCRM
Reps heard about new assignments days later.	**The bell chimes the instant something is assigned to you.**
"New task assigned" never said which customer it was for.	**Every notification names the customer or company.**
Accepting a transfer meant opening several screens.	**Accept or reject straight from the bell, with a reason.**
Tasks slipped past their due time.	**Reminders and overdue alerts arrive in the app and by email.**

Everything included

- ✓ **Live alerts with a chime**, with no need to refresh.
- ✓ You are notified about assignments (leads, enquiries, tasks, meetings), **transfer requests**, visit assignments and reschedules, meeting invites, **approval requests**, and **task reminders and overdue alerts**.
- ✓ **Accept or Reject from the bell**, with a reason box.
- ✓ Replies name the person ("Omar accepted the assignment…").
- ✓ The **Notifications page** keeps everything, with All, Unread and Read tabs and pages of results.
- ✓ **Open** jumps straight to the record. **Mark read** and **Mark all read**.
- ✓ You only ever see your own notifications.

How to clear your notifications

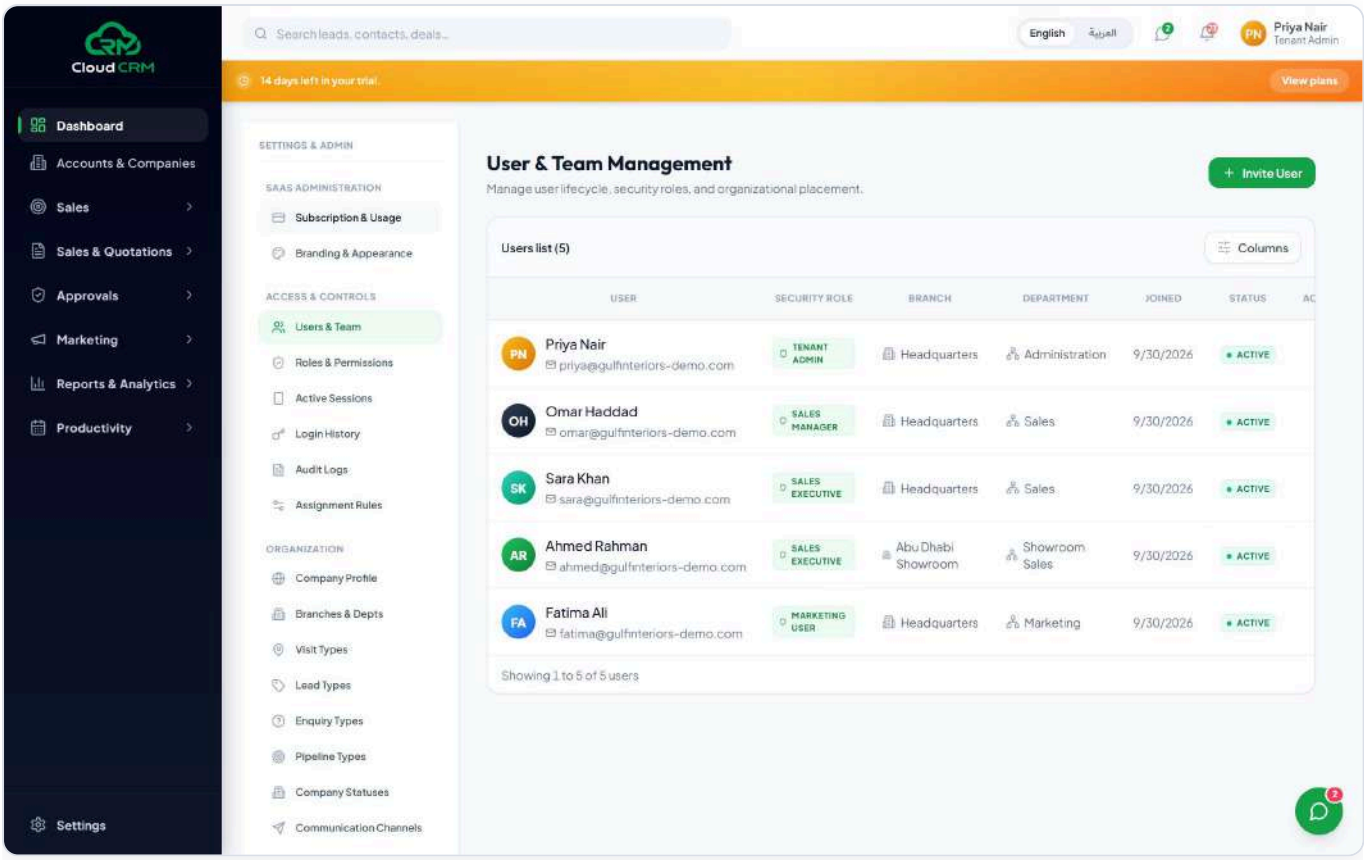
1. Click the **bell** in the top bar.
2. For a request, click Accept or Reject (adding a reason if you reject).
3. Click any other item to open the record it is about, then click **Mark all read**.
4. To find older alerts, click **View all notifications**.

17 Users, Roles & Permissions

Settings → Users & Team · Roles & Permissions

Overview

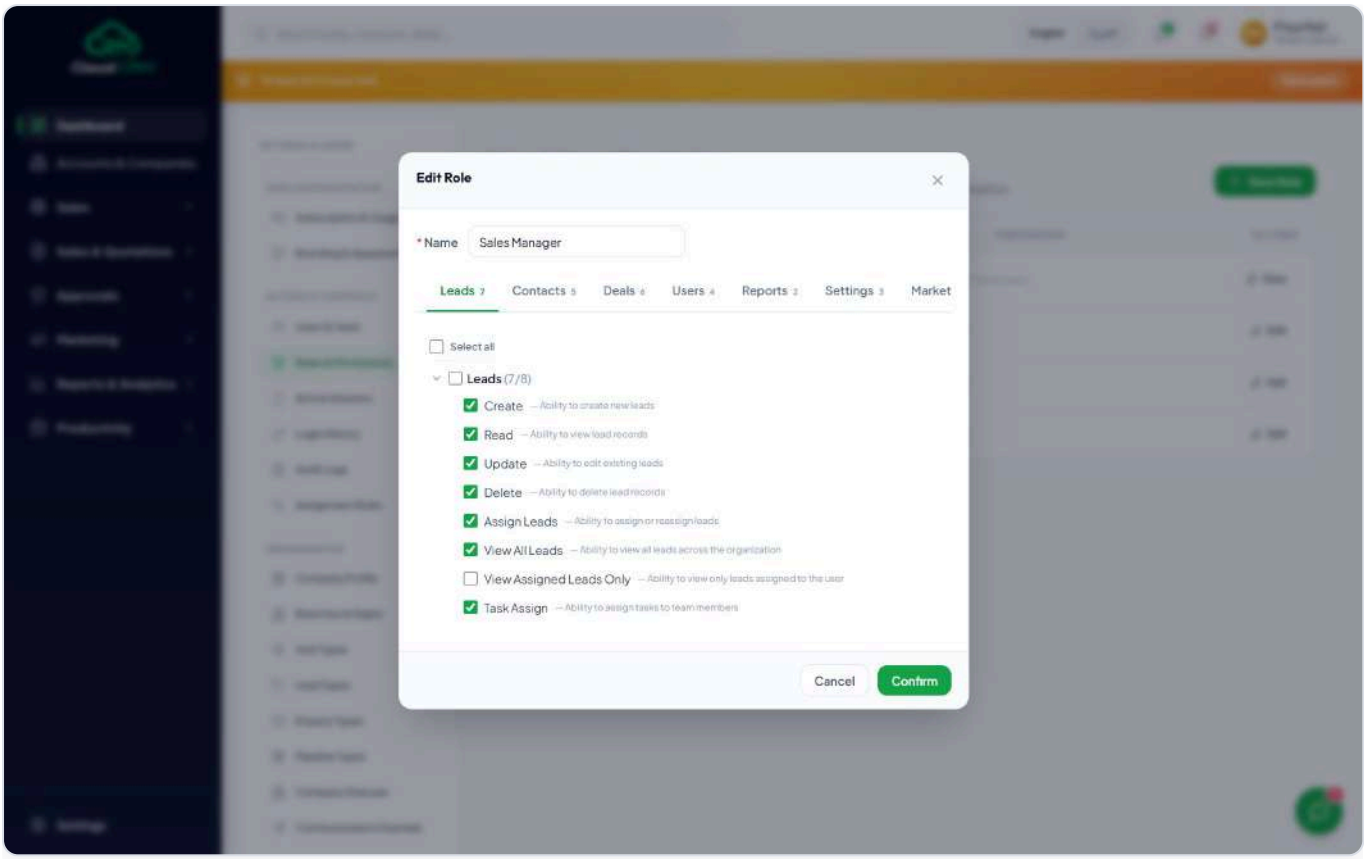
Add your staff, place them in the right branch and department, and decide exactly what each job role can see and do, module by module. Menus and records hide automatically for people who don't have access.



User & Team Management: every team member with role, branch, department and status

Before & After

BEFORE	AFTER, WITH CLOUDCRM
One shared admin login for the whole team.	**One login per person, each with the right role.**
Everyone could see everything.	**Salespeople see only their own leads and deals, and managers see the whole team.**
IT created accounts by hand.	**The administrator sends an invitation in 30 seconds.**
Changing someone's access needed a developer.	**Tick boxes and click Confirm. The change applies without the person signing in again.**



Editing a role: choose actions module by module, including "view all" or "assigned only"

Everything included

- ✓ **Invite User** by email with first and last name, security role, branch and department.
- ✓ If the invitation email can't be sent, **Copy Link** lets you share it by WhatsApp or chat. **Resend Email** renews the 7-day link.
- ✓ A table of pending and failed invitations.
- ✓ **Edit Profile** (name, role, branch, department), admin-triggered **Reset Password**, and **Delete User**.
- ✓ Choose which **columns** to show, with profile photos next to names.
- ✓ Four starting roles, plus **unlimited custom roles**.
- ✓ Permissions for every module: Leads, Enquiries, Contacts, Companies, Deals, Quotation, Catalog, Approvals, Visits, Meetings, Calendar, Marketing, Reports, Chat, Settings, Users, Security and more.
- ✓ **"See everything" vs "see only mine"** for leads, enquiries, contacts, deals, companies and visits.
- ✓ Special rights such as assign leads, reassign, view team workload, manage types, manage settings and view audit logs.
- ✓ **Select all** for each module. Menus hide automatically and the server enforces every rule.

How to invite a team member

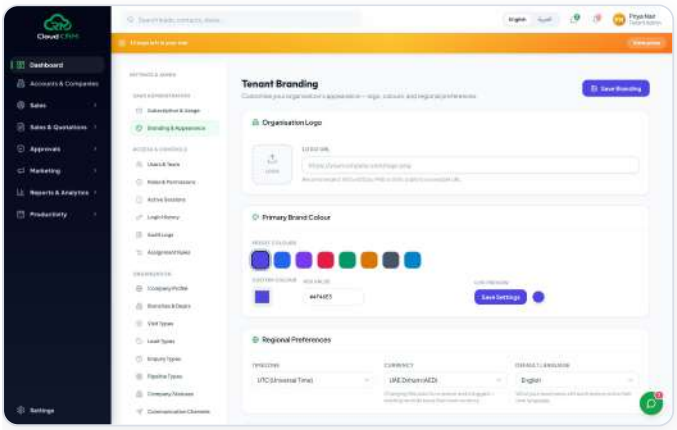
1. Go to **Settings** → **Users & Team** and click `Invite User`.
2. Enter the person's first name, last name and email.
3. Choose a **Security Role**, and optionally a branch and department.
4. Click `Create User Account`. The person clicks the email link, sets a password and signs in.
5. To change what a role can do, open **Roles & Permissions**, click `Edit`, tick the actions you want and click `Confirm`.

18 Company Setup

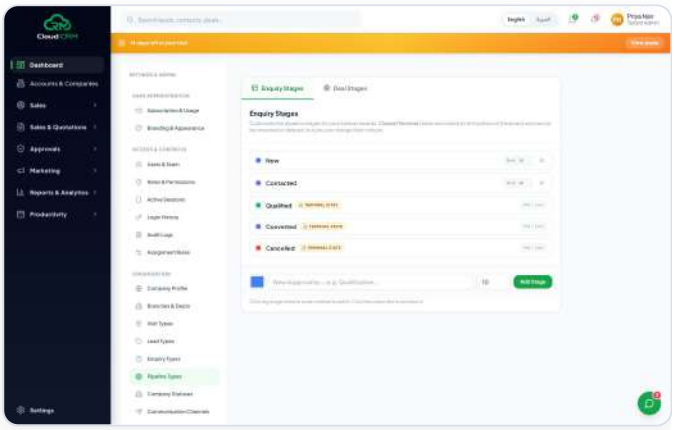
Settings → Organization

Overview

Make CloudCRM yours: your company details and logo, brand colour, currency and exchange rates, branches and departments, pipeline stages, record types, customer statuses, and the email, SMS and WhatsApp channels your team sends from.



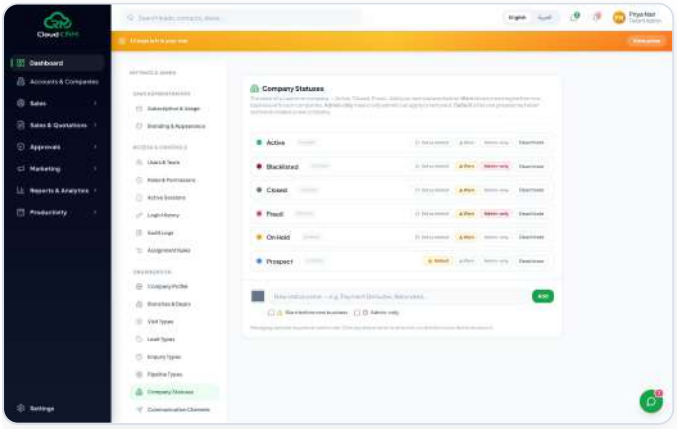
Branding & Appearance: logo, brand colour, currency and default language



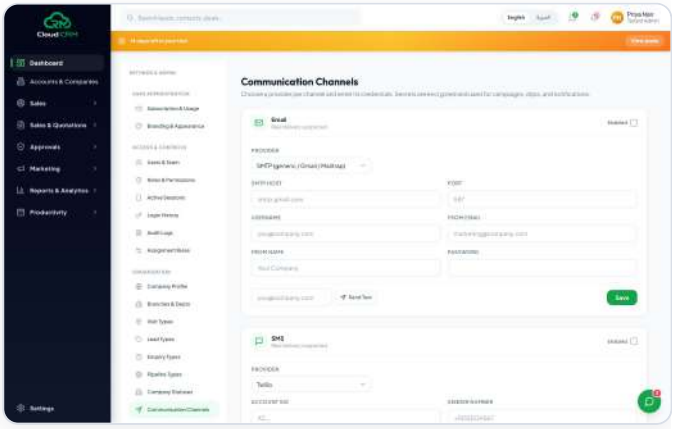
Pipeline Types: your own enquiry and deal stages, with colours

Before & After

BEFORE	AFTER, WITH CLOUDCRM
Generic-looking software.	**Your logo and brand colour throughout the app and on report PDFs.**
Fixed stage names that didn't match how you sell.	**Your own stages, in your own order and colours.**
Totals mixed several currencies.	**One reporting currency with your own exchange rates.**
Marketing and invitation emails came from a generic address.	**Emails go out from your own company mailbox.**



Company Statuses, with "warn before new business" and admin-only options



Communication Channels: Email (SMTP), SMS and WhatsApp

Everything included

- ✓ **Company Profile**: logo upload (shown on the dashboard, menu and PDFs), legal name, website, support email, phone and address.
- ✓ **Regional settings**: company time zone, and **rows per page** for every list.
- ✓ **Branding**: brand colour presets or a custom colour, with a live preview.
- ✓ **Reporting currency** (AED, USD, INR, SAR, OMR, QAR). Changing it asks for a reason and confirmation, and the change is logged.
- ✓ **Exchange rates** table that you control.
- ✓ **Default language** for the company (English or العربية).
- ✓ **Branches & Departments**.
- ✓ **Pipeline Types**: rename, reorder, recolour, add and delete enquiry and deal stages. Closed stages are protected.
- ✓ **Lead Types, Enquiry Types, Visit Types**: add types with colours, set a default, and switch types on or off.
- ✓ **Company Statuses**: warn before new business, admin-only, default status, and activate or deactivate.
- ✓ **Communication Channels**: company email via SMTP (including Gmail), and SMS and WhatsApp via Twilio. Passwords are stored encrypted. **Send Test** checks your setup.
- ✓ **Two-step sign-in** for the whole company (Security & Login section).

How to set up your company email

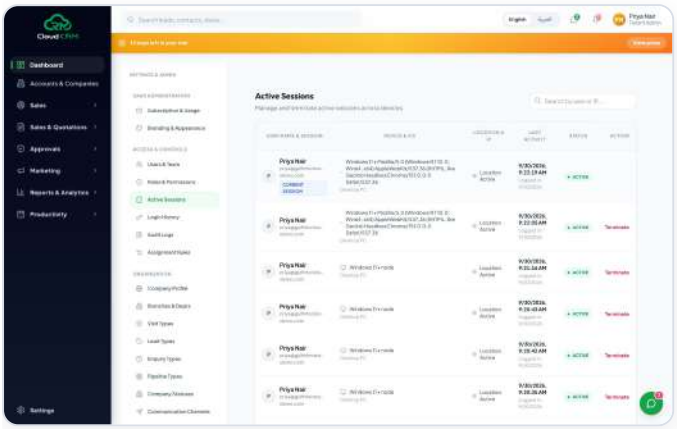
1. Go to **Settings** → **Communication Channels** and find the **Email** card.
2. Choose SMTP, then enter the host, port, username, password, from email and from name.
3. Switch on **Enabled** and click `Save`.
4. Enter your own address and click `Send Test` to confirm it works.

19 Security

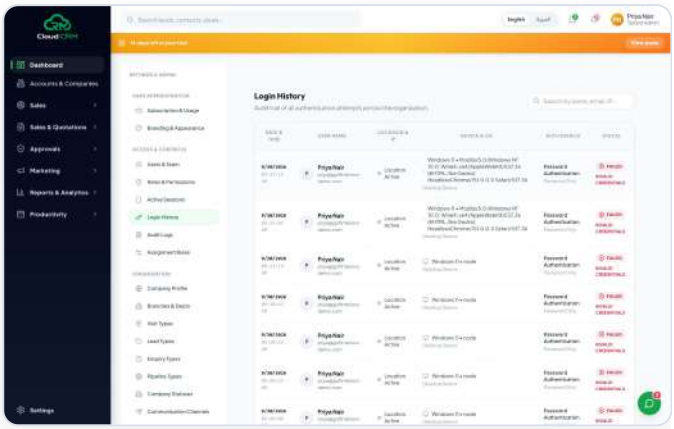
Settings → Active Sessions · Login History · Audit Logs

Overview

See where you are signed in, sign out a device you don't recognise, review every sign-in attempt, and check a record of important changes.



Active Sessions, with Terminate for any device



Login History: every attempt, with its device and result

Before & After

BEFORE	AFTER, WITH CLOUDCRM
Nobody knew who had signed in, or from where.	**A full sign-in history with device, result and reason for any failure.**
A lost laptop stayed signed in.	**Terminate signs that device out immediately.**
Passwords could be guessed endlessly.	**After 5 failed attempts, a one-time email code is required.**

Everything included

- ✓ **Active Sessions**: device, browser, location and IP, last activity, and a "Current Session" badge. **Terminate** any other session.
- ✓ **Login History**: date and time, device, sign-in method (password only or code verified), and success or failure with the reason.
- ✓ **One-time email code** after 5 failed attempts.
- ✓ Optional **company-wide two-step sign-in**.
- ✓ Sign-in rate limiting and 72-hour sessions.
- ✓ **Audit Logs** for key events, with search and filters (administrators).
- ✓ Your email is your sign-in identity and can't be changed by accident.

How to sign out a lost device

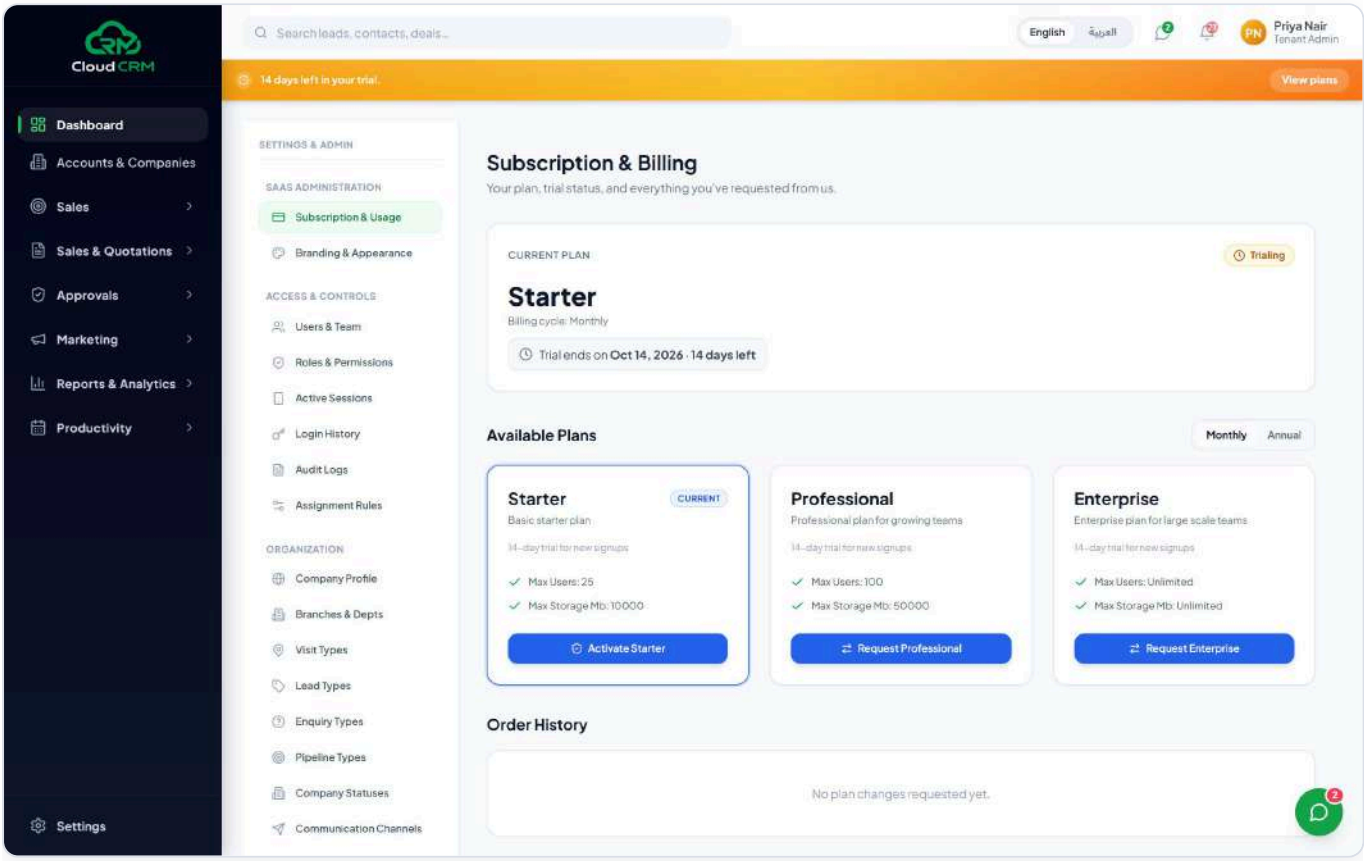
1. Go to **Settings** → **Active Sessions** (or **Profile** → **My Sessions**).
2. Find the device by its browser, location and IP.
3. Click **Terminate** and confirm with **Terminate Session**.

20 Subscription & Billing

Settings → Subscription & Usage

Overview

Check your plan and trial days, request an upgrade, activate or renew your plan, and download invoices. Requests are approved by the CloudCRM team, and no card is charged inside the app.



Current plan and trial countdown, the available plans and your order history

Before & After

BEFORE	AFTER, WITH CLOUDCRM
Subscriptions expired without warning.	**A countdown banner on every page, and days left shown on the plan card.**
Upgrading meant emailing the sales team.	**One click on `Request Professional`.**
Paper invoices went missing.	**PDF invoices are always available in the app.**

Everything included

- ✓ **Current plan** card with its status (Trialing, Active, Expired…), billing cycle and days left.
- ✓ **Monthly / Annual** switch.
- ✓ Plan cards: **Starter, Professional, Enterprise**, with their features listed.
- ✓ **Request, Activate or Renew** a plan, with a confirmation step.
- ✓ **Order History** (Pending, Approved, Rejected) and **Invoices** with PDF download.
- ✓ **Trial banner** on every page, turning red once the trial has expired.
- ✓ If the plan expires, the administrator is taken straight to Billing to renew, and staff see a clear message.

How to upgrade your plan

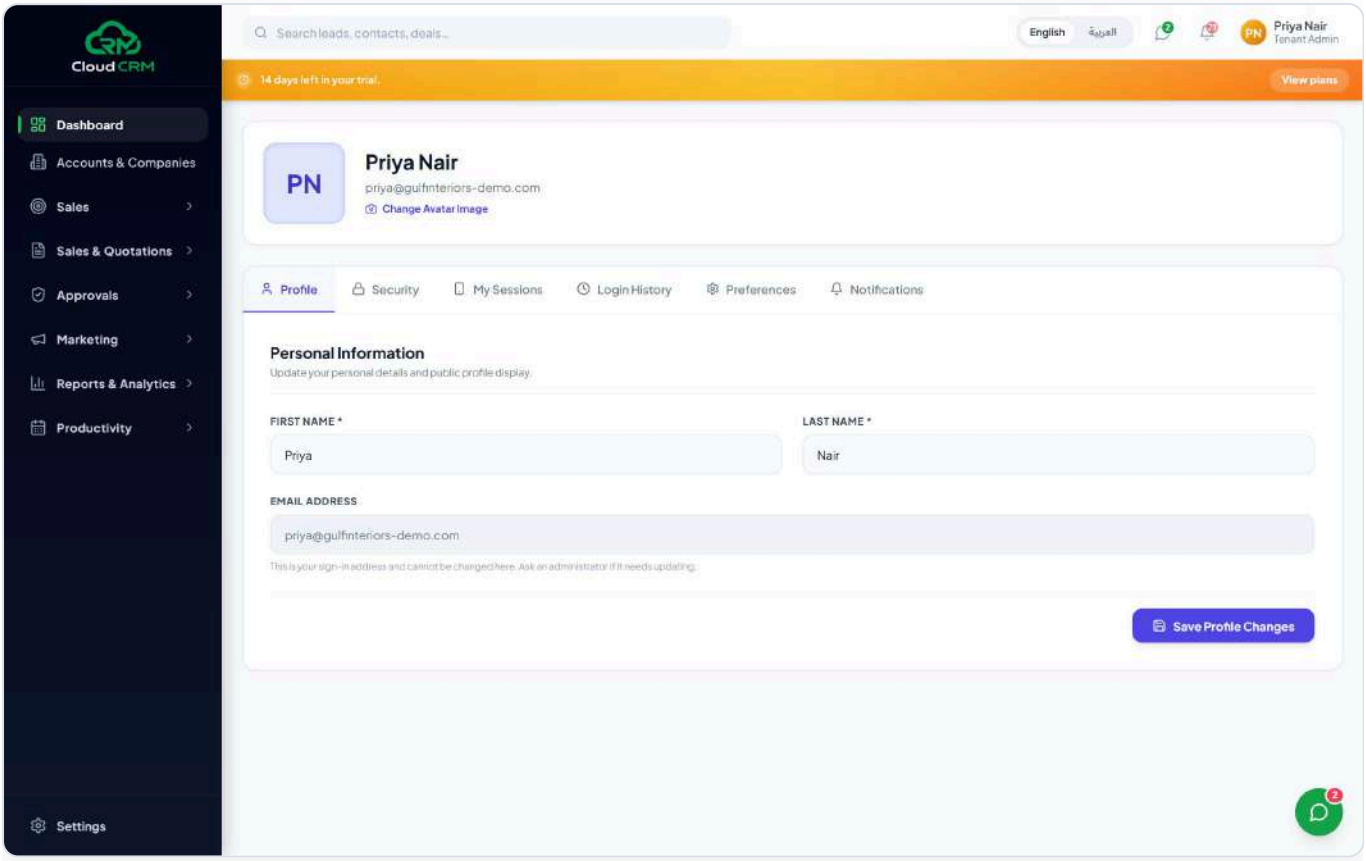
1. Go to **Settings** → **Subscription & Usage**.
2. Choose **Monthly** or **Annual**.
3. Click `Request Professional` (or `Request Enterprise`) and confirm.
4. Follow its status in **Order History**. The invoice appears once the request is approved.

21 My Profile

Avatar menu → View Profile

Overview

Your personal space: your photo and name, your password, your sessions and sign-in history, and your language.



Profile, with tabs for Security, My Sessions, Login History and Preferences

Before & After

BEFORE	AFTER, WITH CLOUDCRM
Changing a password meant asking an administrator.	**Change it yourself in seconds.**
Colleagues were just initials on a screen.	**Your photo appears everywhere your name does.**

Everything included

- ✓ **Profile photo** upload (JPEG, PNG, GIF, WebP), and first and last name.
- ✓ **Change password** (current password plus the new one entered twice).
- ✓ Your **sessions** and **login history**.
- ✓ **Preferences**: your personal language, which is remembered on every device.

How to change your password

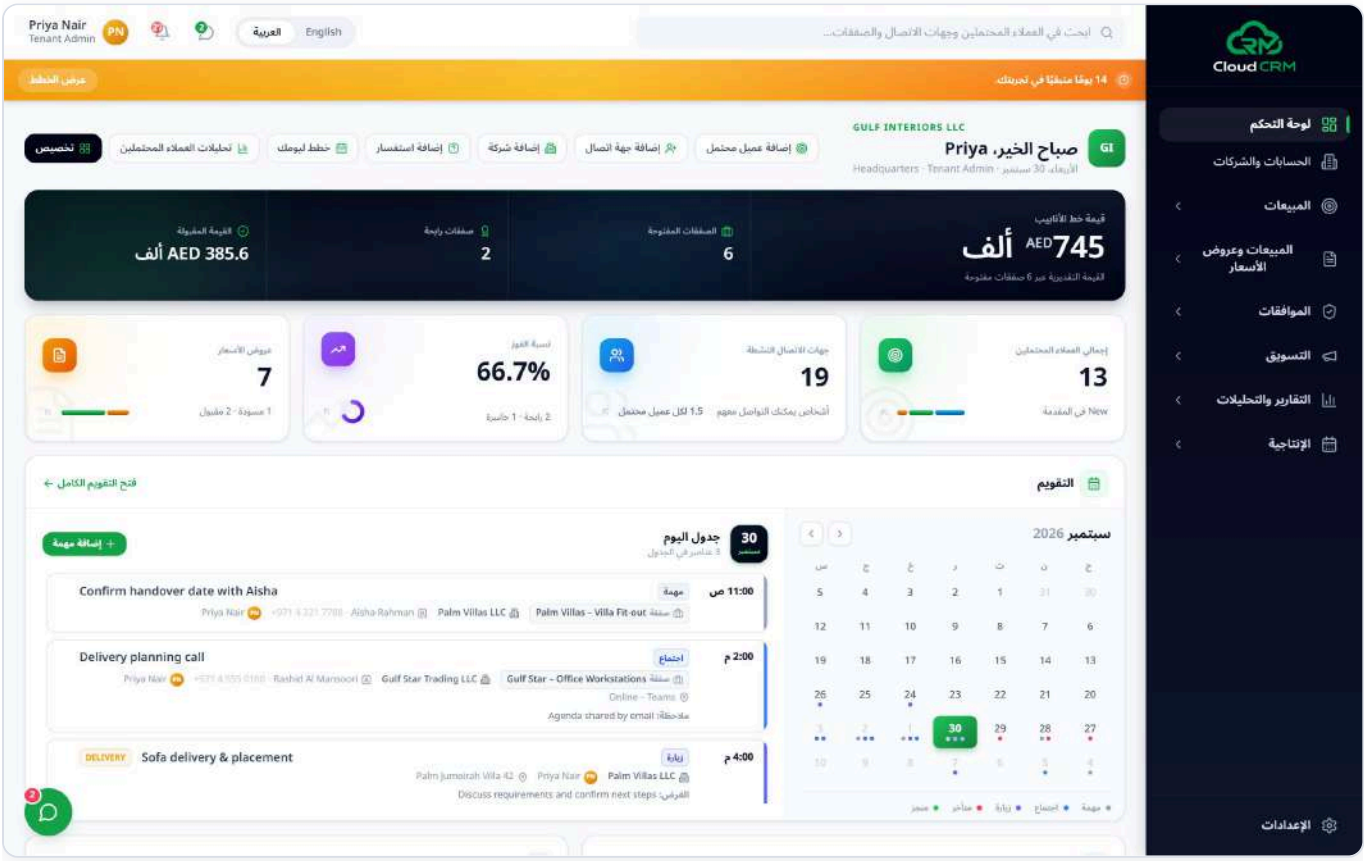
1. Click your avatar at the top right, then **View Profile**.
2. Open the **Security** tab and click **Update Password**.
3. Enter your current password and the new password twice, then click **Save New Password**.

22 Arabic & Right-to-Left

Top bar → English | العربية

Overview

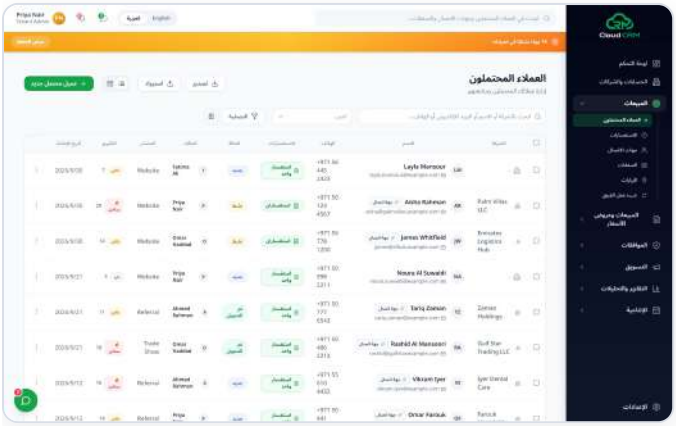
CloudCRM works fully in Arabic, with a proper right-to-left layout. Each person picks their own language with one tap, and the choice follows them to any device. Administrators can also set a default language for the whole company.



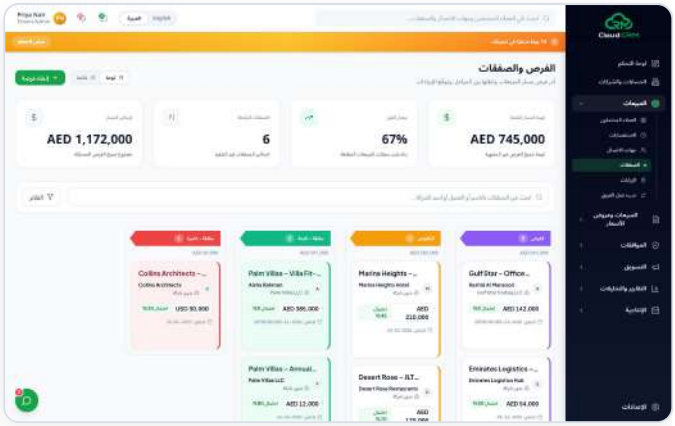
The Dashboard in Arabic: the menu moves to the right and the whole layout mirrors

Before & After

BEFORE	AFTER, WITH CLOUDCRM
An English-only CRM that Arabic-speaking staff avoided.	**Full Arabic with a right-to-left layout.**
One language was forced on everyone.	**Each person chooses their own, and the choice follows them to any device.**
Switching to Arabic digits broke phone numbers and totals.	**Western digits are kept for all figures (AED 1,250.00) in both languages.**



Leads in Arabic



Deals pipeline in Arabic

Everything included

- ✓ An **English | العربية switch** on the top bar, the sign-in and sign-up pages, and **Profile → Preferences**.
- ✓ The whole layout **flips right-to-left**: the menu moves to the right and arrows and menus mirror.
- ✓ Translated screens: sign-in and sign-up, menus, dashboard, leads, enquiries, contacts, companies, deals, quotations, catalog, visits, calendar, approvals, marketing, reports, chat, notifications and every settings page.
- ✓ **Arabic date pickers** and translated country names.
- ✓ **Western digits** for dates, phone numbers and money.
- ✓ What your team types (names, notes) is never translated and keeps its own text direction.
- ✓ **Company default language** under Settings → Branding & Appearance.
- ✓ In a mixed team, **each person works in their own language**.

How to switch to Arabic

1. Click `العربية` in the top bar. The screen flips right-to-left straight away.
2. Your choice is saved to your account and follows you to any device.
3. Administrators: to make Arabic the default for everyone, go to **Settings → Branding & Appearance → Default language**, choose العربية, and click **Save Branding**.

Need help? Contact your CloudCRM administrator or the CloudCRM support team.