



# CRM TRAINING MANUAL

THE ROAD WARRIORS

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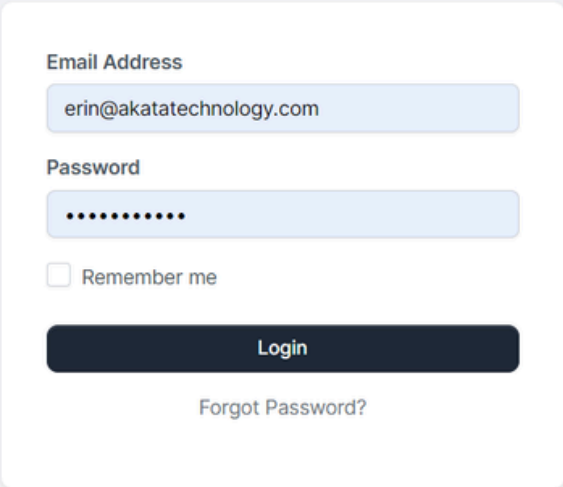
# CRM LOGIN

## PERFEX CRM

<https://pmi.devteams.co.za/admin/authentication>

**Username:** Email

**Password:** Password will be sent with welcome email



**Login**

Email Address

erin@akatechnology.com

Password

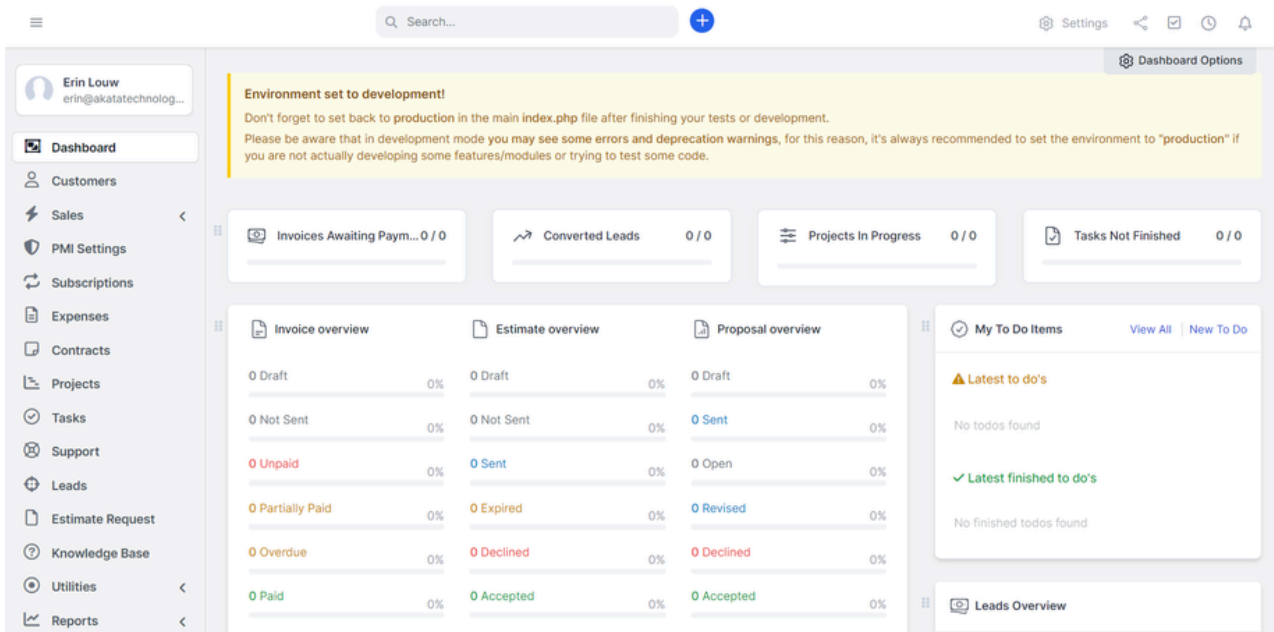
.....

Remember me

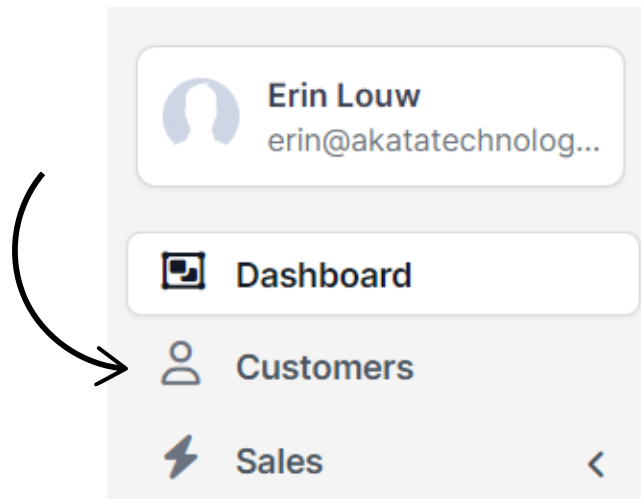
**Login**

[Forgot Password?](#)

Once you have logged in you will be redirected to the CRM Dashboard where you can see all types of data.



Navigate to the "Customers" tab to add clients and start collecting data



The customers page will open where you can now view all clients, edit their information

**Customers**  
Contacts ->

4 Total Customers   4 Active Customers   0 Inactive Customers   2 Active Contacts   0 Inactive Contacts   0 Contacts Logged In T...

+ New Customer   Import Customers   Filters

25   Export   Bulk Actions   Search...

<input type="checkbox"/>	#	Company	Primary Contact	Primary Email	Phone	Active	Groups	Date Created	Customer Type
<input type="checkbox"/>	4	Akata				<input checked="" type="checkbox"/>		2024-12-09 13:26:38	Retailer
<input type="checkbox"/>	3	bob dealers	mary smith	dev@demosites.co.za		<input checked="" type="checkbox"/>	Retailer	2024-12-09 10:11:11	Retailer
<input type="checkbox"/>	1	test	abby smith	abby@demosites.co.za		<input checked="" type="checkbox"/>		2024-12-05 13:18:37	
<input type="checkbox"/>	2	test2				<input checked="" type="checkbox"/>	Distributor	2024-12-07 23:03:49	Retailer

Showing 1 to 4 of 4 entries   Previous   1   Next

Add a New Customer

+ New Customer   Import Customers

Fill in all the customer information and click “Save”

### Add New Customer

Customer Details   Custom Fields   Billing & Shipping

\* Company

VAT Number

Phone

Website

Groups  
Nothing selected ▼ +

🔗 Currency      Default Language  
System Default ▼      System Default ▼


Address

City

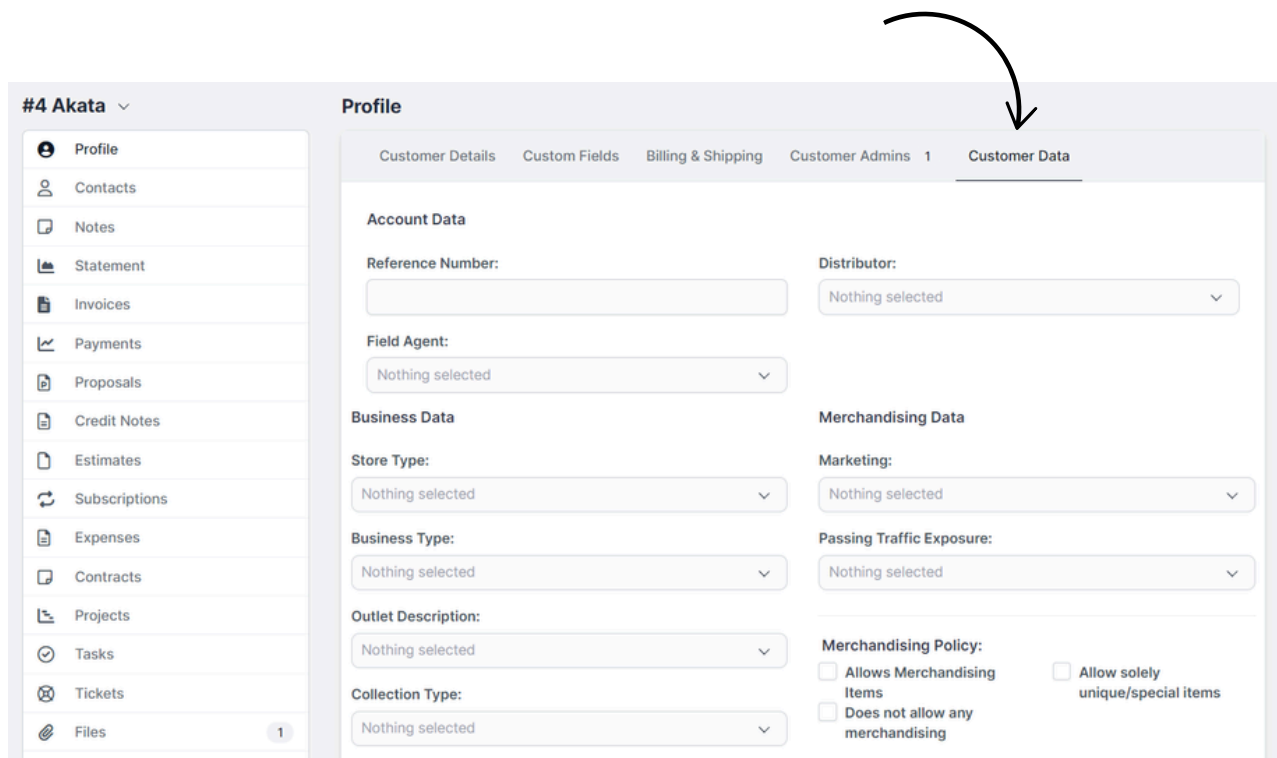
State

Zip Code

Country  
Nothing selected ▼



Once you have saved the customer, additional tabs and fields will be visible. Please navigate to “Customer Data” to fill out the required fields as per PMI’s scope.



The screenshot displays a software interface for a customer profile. On the left is a sidebar menu for customer '#4 Akata' with options like Profile, Contacts, Notes, Statement, Invoices, Payments, Proposals, Credit Notes, Estimates, Subscriptions, Expenses, Contracts, Projects, Tasks, Tickets, and Files. The main area is titled 'Profile' and contains several tabs: Customer Details, Custom Fields, Billing & Shipping, Customer Admins (with a '1' indicator), and Customer Data. The 'Customer Data' tab is active and contains the following sections:

- Account Data:** Reference Number (text input), Field Agent (dropdown menu), and Distributor (dropdown menu).
- Business Data:** Store Type (dropdown menu), Business Type (dropdown menu), Outlet Description (dropdown menu), and Collection Type (dropdown menu).
- Merchandising Data:** Marketing (dropdown menu), Passing Traffic Exposure (dropdown menu), and Merchandising Policy (checkboxes).

The Merchandising Policy section includes three options:  Allows Merchandising Items,  Does not allow any merchandising, and  Allow solely unique/special items. A black arrow points from the text above to the 'Customer Data' tab.

Fill in all the fields as per the customers data and click "Save"

**Profile**

Customer Details   Custom Fields   Billing & Shipping   Customer Admins 1   **Customer Data**

---

**Account Data**

Reference Number:

Distributor:

Field Agent:

**Business Data**

Store Type:

Business Type:

Outlet Description:

Collection Type:

If Delivery Purchased From:

If Collection Purchased From:

Payment Method:

Representative Consulting:  Yes  No

Supply Source:  Direct  Agent  Retailer  Other

**Merchandising Data**

Marketing:

Passing Traffic Exposure:

Merchandising Policy:  Allows Merchandising Items  Allow solely unique/special items  Does not allow any merchandising

Consumer Service:  Self service  Across Counter service  Delivery

Exterior Branding:  Light box  Chromadek Sign  Posters  Other

Interior Branding:  Light box  Chromadek Sign  Posters  Other

Economic Environment:  High Income  Medium Income  Low Income

**Geographic Data**

Latitude:

Longitude:

Elevation:

Geographic Location:

Outlet Location:

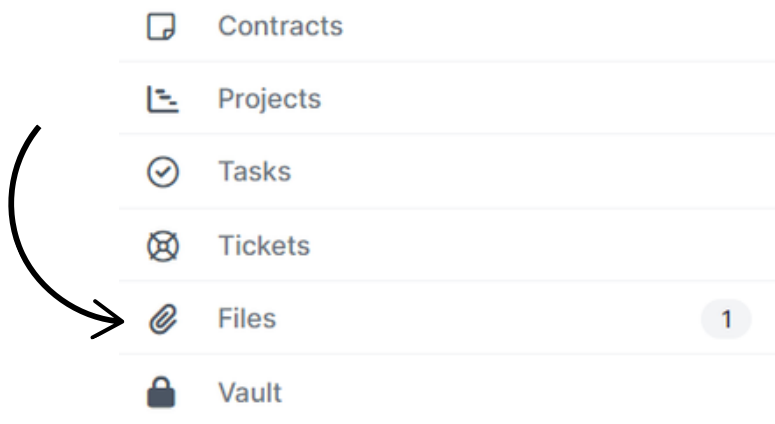
Category Availability:

POS Fixtures and Equipment:

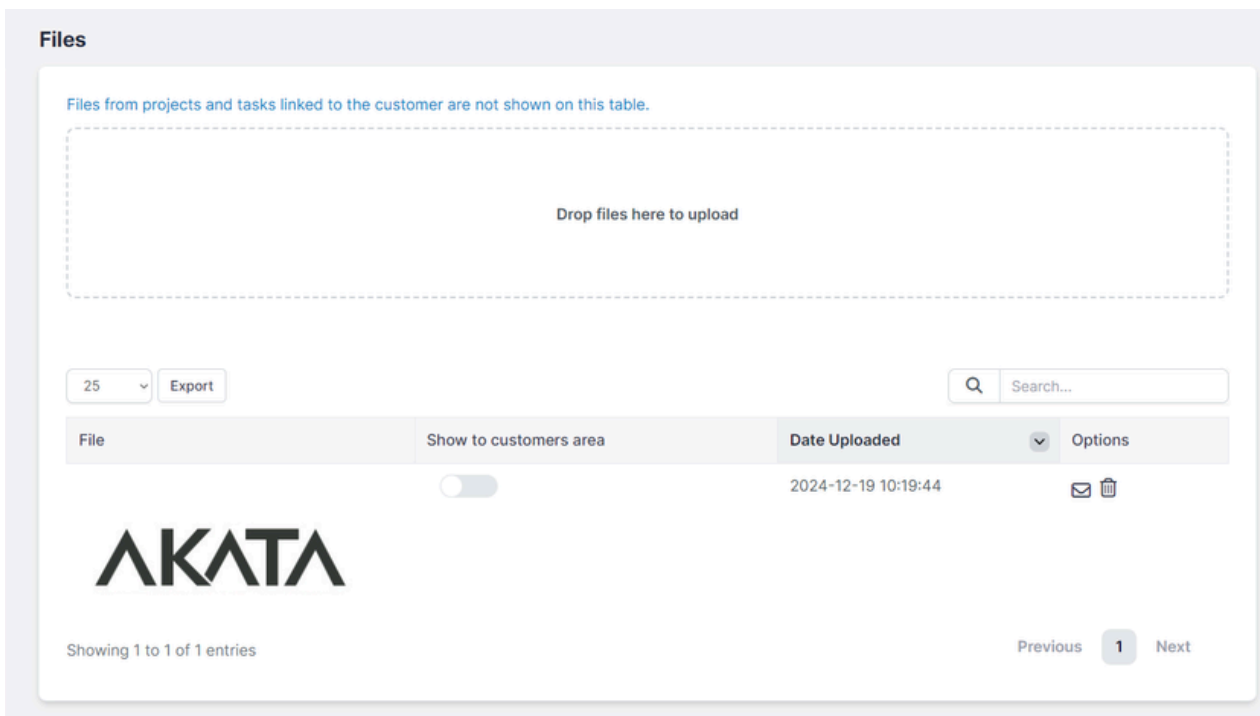
**Stocked Brands:**

<input type="checkbox"/> Afrisam	<input type="checkbox"/> Apc	<input type="checkbox"/> Bb	<input type="checkbox"/> Builders Pride	<input type="checkbox"/> Castle	<input type="checkbox"/> Champion
<input type="checkbox"/> Holcim	<input type="checkbox"/> Icon	<input type="checkbox"/> Kbc	<input type="checkbox"/> Lafarge	<input type="checkbox"/> Mamba	<input type="checkbox"/> Mpc
<input type="checkbox"/> Ppc	<input type="checkbox"/> Ppc Idm	<input type="checkbox"/> Sephaku	<input type="checkbox"/> Star	<input type="checkbox"/> Value	<input type="checkbox"/> Rhino

In the left hand navigation, proceed to “Files” to upload an image of the store front of the store or any other relevant images that are necessary.



Proceed to upload any images or company documents to this section that pertain to this client.





**THANK YOU**