

LMN CRM App Training Guide

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General Instructions

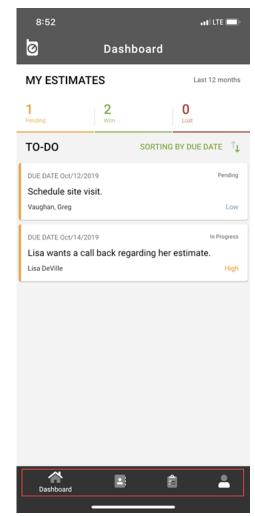
Download and setup

- 1. Access Google Play Store (Android) or App Store (Apple products) on your smartphone/tablet.
- 2. Search for LMN CRM and download the app.
- 3. Select the LMN CRM app from your list of apps and enter your username and password.

Learning the taskbar

After logging in, you will find the following four* links on your taskbar located on the bottom of your screen: Dashboard, Contacts, To-Dos, Account.

- 1. Dashboard: A count of your estimates (Pending, Won or Lost) will be found here, along with all past due To-Dos and those which are due within a week of today's date.
 - Sort your To-Dos by Due Date, Priority or Client's name.
 - Click on a To-Do to review or edit it.
- 2. Contacts: All Active Clients, Leads, etc. will appear here.
 - Click on a Client/Lead to review their information.
 - Click + Client to create new.
- 3. To-Dos: Here you can review All To-Dos, To-Dos Assigned to you or To-Dos created by you.
 - Sort your To-Dos by Due Date, Priority or Client's name.
 - Click on a To-Do to review or edit it.
 - Click + To-Do to create a new To-Do.
- 4. Account: You will see your account specific information.
 - Terms & Conditions/Privacy Policy: Will show you the LMN Terms & Conditions/Privacy Policy.
 - Help Videos: Access to our CRM App training videos.
 - Sign Out: This will log you out of the app.





Contacts

The Contacts page

Sorting

The two tabs on the Contacts screen will sort your clients by:

- All: All active contacts for your company.
- My: The active contacts assigned to you for your company.

Filtering

The green Type of Client button will filter your clients by:

- All: All active contacts based on sorting option (All or My).
- Lead: Any client with Lead Type set to Lead.
- Client: Any client with Lead Type set to Client.
- Vendor: Any client with Lead Type set to Vendor.
- Subcontractor: Any client with Lead Type set to Subcontractor.
- Employee: Any client with Lead Type set to Employee.
- Other: Any client with Lead Type set to Other.
- Partner: Any client with Lead Type set to Partner.

8:5	53	all LTE 🗩
0	Contacts	
Sear	rch	۹
ALL	MY	TYPE OF CLIENTS
В	Bill Gray	Lead
	Bob & Michelle Pratt	Client
С	CF Markville	Client
	Chris Taylor	Lead
	Cornell Community Center	Lead
D	Darnell Brown	Lead
	Dianna Ross	Lead
	Dina Turner	Lead
	Dorset Lane	Client
		+ CLIENT
Н	Home Depot	Lead
~	Contacts	*



Add new

If you need to add a new lead or client from the app, follow these instructions.

- 1. Ensure you are on the Contacts Tab
- 2. Click the green + Client button.
- 3. Add your client Name and Billing Address (required).
- 4. Select your Lead Type, Referral type and Referral Notes and pick who the new client is assigned to.
- 5. Add First Name, Last Name (required), Phone number(s) and Email address for your Primary Contact.
- 6. Click the green Create button.

Once added, you can move through the tabs as shown below.

8:53		•11 LTE 📼
<	Create client	
Name*		
ADDRESS		
Address line	1	
Address line	2	
City		
State / Provin	ice	
Zip / Postal		
Country		
Lead type		
Lead		•

The following tabs will be available when you click on a Client from your Contact list.



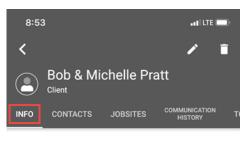
Info

This screen will allow you to review and edit the following:

- Lead Type
- Billing Address
- Assigned company rep
- Referral Source
- Referral Notes

To edit:

- 1. Click the Pencil icon located in the top right corner of your screen.
- 2. Make your changes and click the green Update button.



ADDRESS

Address line 1 467 Sandringham Drive

Address line 2 ACCESS CODE: 423

City
Toronto
State / Province
Ontario
Zip / Postal
L1E2A2
Country
Canada
Assigned to
Kristen Scott

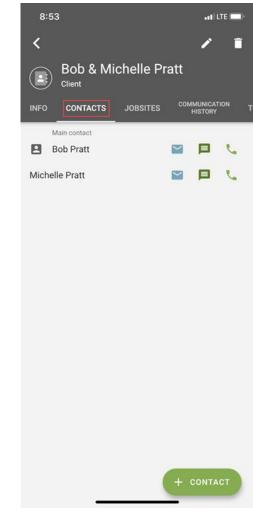


Contacts

Here you will see a full list of all Contacts within this Client, sorted with Primary Contact at the top of the screen, additional contacts in alphabetical order.

To contact one of your listed contacts:

- Email: Click the envelope icon.
 - Note: <u>crm@golmn.com</u> is automatically Copied, allowing this email to be inserted into your Communication History.
- Text: Click the message icon.
 - Note: Text conversations will not automatically be copied to Communication History. You will need to add this information to Communication History.
- Phone: Click the phone icon.
 - Note: Phone conversations will not automatically be copied to Communication History. You will need to add this information to Communication History.





To add a new Contact:

- 1. Click the green + Contact button.
- 2. Add First Name, Last Name (required), Position, Phone number(s) and Email address for your Primary Contact.
- 3. Select checkboxes if your customers do not want the following contact:
 - Do not call: If selected, this icon will be removed for this contact from the Contacts screen.
 - Do not mail: If selected, this icon will be removed for this contact from the Contacts screen.
 - Do not email: If selected, this icon will be removed for this contact from the Contacts screen.
- 4. Add Notes if applicable.
- 5. Click the green Create button.

To edit an existing Contact:

- 1. Click on the contact you want to edit.
- 2. Click the Pencil icon located in the top right corner of your screen.
- 3. Make your changes and click the green Update button.

8:53			att	.TE 🔲	
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Bob & Mic _{Client}	helle Pr	att			
INFO CONTACTS	JOBSITES	COM	IMUNICAT HISTORY	ION	т
Main contact Bob Pratt			Þ	L.	
Michelle Pratt			Þ	r.	
(416)	822-838	33			
Cancel		Call			
		+	CONTA	ст	



Jobsites

Here you will see all Jobsites for this contact.

To add a new Jobsite:

- 1. Click the green + Jobsite button.
- 2. Add Jobsite Name (required) and Address.
- 3. Select a contact to associate to this Jobsite (if applicable).
- 6. Add Notes if applicable.
- 7. Click the green Create button.

			1	Î
\bigcirc	Bob & N _{Client}	Michelle Pi	ratt	
INFO	CONTACTS	JOBSITES	COMMUNICATION HISTORY	1
JOBSIT	'E 1			
Pratt	Cottage			
Address				
1 Moo P0C1H		, Muskoka, Ont	ario, Canada,	
JOBSIT	'E 2			
Pratt	Residence			
Address				
1 Mide	dle Avenue, P	ickering, ON, C	A, L8J9J0	



To edit an existing Jobsite:

- 1. Click on the jobsite name that you want to edit.
- 2. Click the Pencil icon located in the top right corner of your screen.
- 3. Make your changes and click the green Update button.

To attach a file to a Jobsite:

- 1. Click on the Jobsite you want to add a file to.
- 2. Click the green Attach Files button.
- 3. Select to load your file from one of the following options:
 - Photo Library
 - Camera
 - Other
- 4. **If photo or camera is chosen:* Use the window available to crop your image. Click the green Crop Image button when ready.
- 5. Adjust the Name if you want and add a Comment for your file/photo.
- 6. Click the green Create button.

	10:12		al LTE 🔲
	<	Edit jobsite	
	Pratt Cottag	ge	
I.	ADDRESS		
	Address line 1 1 Moon Riv		
	Address line	e 2	
IS:	City Muskoka		
	State / Province Ontario	e	
ble	Zip / Postal		
	Country		
	CONTACTS		
	Contact		



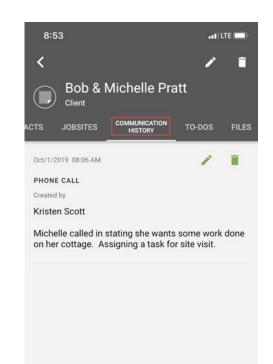
Communication History

To add a new Note:

- 1. Click the green + Note button.
- 2. Pick your type:
 - Phone Call
 - Email
 - Note
- 3. Add your Communication Note (required).
- 4. Date and Time will be pre-populated with the current date/time. If you need to adjust, click on the field and edit.
- 5. When finished, click the green Create button.

To edit an existing Note:

- 1. Click the Pencil icon beside the note you want to edit.
- 2. Make your changes and click the green Update button.





To-Dos

All to-dos associated to this client will show here. The three tabs on this screen will sort your clients by:

- Assigned to me: Any to-dos related to this customer which are assigned to you.
- Created by me: Any to-dos related to this customer which were created by you.
- All: All to-dos related to this customer.

To add a new to-do:

- 1. Click the green + To-Do button.
- 2. Add your To-Do note and Due Date (required), select your Priority, add Instructions if applicable and assign to the appropriate Company rep using the Assigned To tab.
- 3. When finished, click the green Create button.

To edit an existing to-do - Mark as Complete

Option 1:

- 1. Put your finger on the To-Do and swipe right.
- 2. Click Complete

Option 2:

- 1. Click the to-do you wish to complete.
- 2. Click the Mark as complete button at the top of the screen.

To edit an existing to-do – Edit details

- 1. Click the To-Do you want to edit.
- 2. Click the Pencil icon located in the top right corner of your screen.
- 3. Make your changes and click the green Update button.

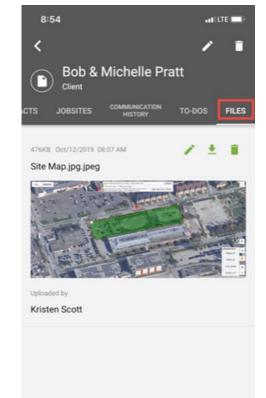
8:54		.1	I LTE 🗔
<		1	Ē
Bob & N Client	/lichelle Pra	itt	
TS JOBSITES	COMMUNICATION HISTORY	TO-DOS	FILES
	CREATED BY ME	ALL	-
	SORTIN	G BY DUE D	ATE 斗
DUE DATE Oct/3/2019			Completed
Site visit for quote.			
Assigned to: Bob Barker Created by: Kristen Scott			Normal
DUE DATE Oct/8/2019			Pending
Follow up on pricin	ig and signed agi	reement	
Assigned to: Bob Barker Created by: Kristen Scott			Normal
		+ то	-DO
_			



Files

To add a customer-specific File or Photo, follow these steps:

- 1. Click on the file tab within your Client.
- 2. Click the green + Files button.
- 3. Select to load your file from one of the following options:
 - Photo Library:
 - \circ Find the photo you want to add.
 - Use the window available to crop your image.
 - \circ Click the green Crop Image button when ready.
 - Camera:
 - o Take your photo.
 - o Click to Use Photo or Retake.
 - Use the window available to crop your image.
 - Click the green Crop Image button when ready.
 - Other:
 - Locate the file you want to add on your device.
- 4. Adjust the Name if you want and add a Comment for your file/photo.
- 5. Click the green Create button.





To-Dos

All open to-dos (Pending or In Progress) will show here. The three tabs on this screen will sort your clients by:

- Assigned to me: Any to-dos related to this customer which are assigned to you.
- Created by me: Any to-dos related to this customer which were created by you.
- All: All to-dos related to this customer

Add New

To add a new to-do:

- 1. Click the green + To-Do button.
- 2. Add your To-Do note and Due Date (required), select your Priority, add Instructions if applicable and assign to the appropriate Company rep using the Assigned To tab.
- 3. When finished, click the green Create button.

8:55		ati lte 💷)
<	Create To-Do	
To-Do notes*		
		0/1000
Client		
Status		
Pending		•
Due Date*		
Priority		
Low		•
]
Instructions		
		0/1000
Assigned to		
Kristen Scott		•

Crosted by



Mark as Complete

You have two options for marking a To-Do as complete:

Option 1:

- 1. Put your finger on the To-Do and swipe right.
- 2. Click Complete.

Option 2:

- 1. Click the to-do you wish to complete.
- 2. Click the Mark as complete button at the top of the screen.

Editing a to-do

To edit an existing to-do

- 1. Click the To-Do you want to edit.
- 2. Click the Pencil icon located in the top right corner of your screen.
- 3. Make your changes and click the green Update button.

10:08		ati LTE 🗩)
0	To-Dos	
ASSIGNED TO	ME CREATED BY ME	ALL
	SORTING B	Y DUE DATE 斗
Complete	DUE DATE Oct/12/2019 Schedule site visit. Vaughan, Greg	
DUE DATE Oct/1		In Progress
Lisa wants a Lisa DeVille	a call back regarding her es	stimate. _{High}
DUE DATE Oct/1	6/2019	Pending
Schedule sit	e visit	Low
		1 70 00
		+ то-до
*	E E To-Dos	-