



TWP

CRM
twpcrm.com



810-640-8137



sales@totalwebpartners.com

WE'RE OPEN 9-5 ON

NORMAL BUSINESS DAYS

TWP CRM CHEAT SHEET

To login to the TWP CRM go to TWPCRM.com in your preferred browser
Login to the portal using your email and password

THE INBOX

TO VIEW A LEAD IN THE CRM, CLICK ON THE "INBOX" TAB
FOUND ON THE LEFT SIDEBAR OF THE BROWSER



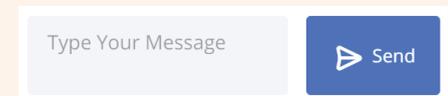
SELECT A LEAD FROM THE LIST OF LEADS WHICH
APPEARS AFTER CLICKING THE "INBOX" TAB

TIP: LEADS IN BOLD ARE UNREAD. NON-BOLDED LEADS
HAVE BEEN READ

TO REPLY TO A LEAD, SELECT A LEAD OF INTEREST FROM THE LEAD LIST

ONCE YOU'RE VIEWING A LEAD YOU CAN REPLY TO IT FROM THE
REPLY BOX LOCATED AT THE BOTTOM OF THE PAGE.

WHEN YOU'VE COMPLETED YOUR MESSAGE, CLICK
THE "SEND" BUTTON



TO DELETE A LEAD, CLICK THE CHECKBOX(ES) OF THE LEAD(S) YOU WANT
DELETE, AND CLICK THE DELETE BUTTON NEAR THE TOP OF THE PAGE

NOTE: YOU WILL HAVE RECEIVED EMAILS WITH EVERY LEAD
IN YOUR INBOX. IF YOU BELIEVE YOU ARE NOT
RECEIVING THESE EMAILS PLEASE CONTACT
TOTALWEB PARTNERS.





TWP

CRM
twpcrm.com



810-640-8137



sales@totalwebpartners.com

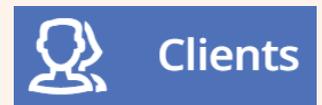
WE'RE OPEN 9-5 ON

NORMAL BUSINESS DAYS

TWP CRM CHEAT SHEET

CLIENTS

TO VIEW A CLIENT IN THE CRM, CLICK ON THE "CLIENTS" TAB FOUND ON THE LEFT SIDEBAR OF THE BROWSER



SELECT A CLIENT FROM THE LIST OF CLIENTS WHICH APPEARS AFTER CLICKING THE "CLIENTS" TAB

TO VIEW MESSAGES FROM A CLIENT, CLICK THE "CONVERSATIONS" TAB NEAR THE RIGHT EDGE OF THE BROWSER



TO ADD INFORMATION TO A CLIENT, SELECT A CLIENT OF INTEREST FROM THE CLIENT LIST

TO ADD A NOTE ABOUT A CLIENT, SELECT THE "NOTES" FIELD, AND TYPE AWAY

TO ADD CONTACT INFORMATION ABOUT A CLIENT, CLICK THE "INFO" TAB NEAR THE CENTER OF PAGE



SCROLL DOWN TO VIEW THE "CLIENT DETAILS" PANE
SELECT A FIELD YOU'D LIKE TO EDIT, AND TYPE AWAY

NOTE: ALL TEXT IS AUTOMATICALLY WHEN YOU TYPE IT.

YOU WILL KNOW THE TEXT IS SAVED WHEN YOU SEE A GREEN BOX READING "CLIENT SAVED SUCCESSFULLY" IN THE BOTTOM LEFT CORNER