



CRM Tool Manual

WorkDo Tool Guide

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Tools (In Do Page)

WorkDo has many tools in the Do page of different levels within the workplace. This means workplace, groups and buddies all have a specific Do button and set of tools to use. Below is Table I-1 that shows which tools are available at which level.

Tools such as HR, Leave, Expenses and Approvals are set to activate once you created a workplace while other tools such as Payroll, Attendance, Leave, Leave Pro, Overtime, Expenses and Approvals (depend on HR) need to be activated manually according to the needs of your company. This means the HR tool needs to stay activated for the other tools to function.

▼ Table I-1. WorkDo Tools

Tool	Workplace	Group	Buddy	Dependency
HR	●	x	x	
Payroll	●	x	x	HR
Attendance	●	x	x	HR
Leave / Leave Pro	●	x	x	HR
Overtime	●	x	x	HR
Expenses	●	x	x	HR
Approvals	●	x	x	HR
Shift	●	x	x	
Conf. Rm	●	x	x	
CRM	●	x	x	
Cashbook	●	●	●	

Tool	Workplace	Group	Buddy	Dependency
Phonebook	●	●	●	
We Buy	●	●	x	
IOU	●	●	x	

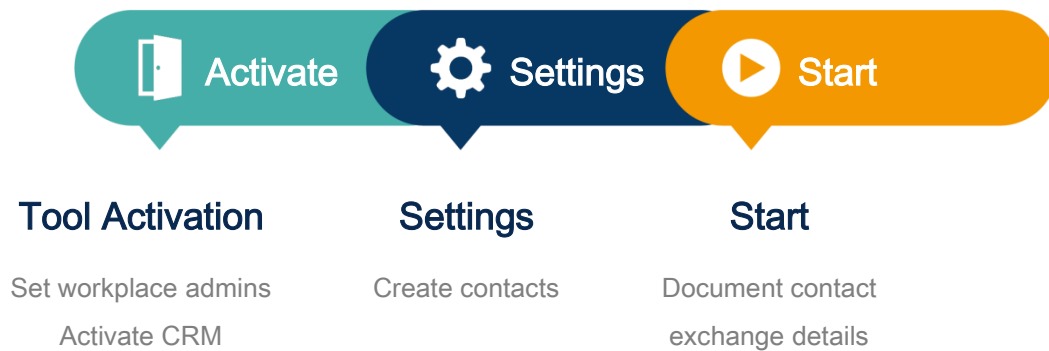
II CRM: Manage Clients with Ease

The CRM tool in WorkDo aims to strengthen your customer relations by managing all the contacts into a secure and centralized platform. With the CRM tool, you can create notes, tasks, appointments and detailed information on interactions and exchanges that can quickly bring managers up to date with particular clients.

Once the tool is activated, all you need to do is simply create customers' contact information and you can begin to jot down exchanges between you. The CRM tool is intuitive to use and you will come to realize this is the only tool you need to strengthen ties with the clients and seal the deals.

III Set Up

In this section, we will guide you on how to use the CRM tool. The web interface is more comprehensive over the app interface, but you can choose your preferred device to set up CRM. This guide will only be focused on the web interface.



▲ Image III-1. Setup Process

STEP 1 . Tool Activation

In order to ensure information is compartmentalized among all members in the workplace, WorkDo was designed to have workplace admins and tool admins (Table Step 1-1).

Workplace admins include an owner and multiple admins that can adjust workplace settings and are usually management and IT employees. Tool Admins^[1] manage the data others see per tool. Tool activation is done by workplace admins.

▼ Table STEP 1-1. Admin Authorities

Authority	Workplace Owner	Workplace Admin	Tool Admin
Delete workplace	●	x	x

¹For more information on tool admin authorities, please see STEP 1-b [Set Up Tool Roles](#).

Authority	Workplace Owner	Workplace Admin	Tool Admin
Change workplace ownership	●	x	x
Maintain workplace settings	●	●	x
Activate workplace tools	●	●	x
Change tool roles	●	●	x
Maintain tool settings	x	x	●

a. Confirm/Assign Workplace Admins

As you can see from Table Step 1-1, workplace admins are assigned by the owner or other admins. If you are a workplace admin, you can skip this portion and go to step 1-b [Set Up Tool Roles](#), and if you need to be a workplace admin, please have one of the admins to assign you the role. You can find out whether you are a workplace admin by following the steps below.

Manage Workplace Admins

1. Ask the workplace admins to go to the Workplace page.
2. Click the gear icon to enter Workplace Settings.
3. Click Manage Admin, the red crown marks the owner and the blue crown marks the admin.
4. Click Add Admin.
5. Choose member(s).
6. Click Done and wait for the success message.
7. Now refresh the page to see admin-only menus.

b. Set Up Tool Roles

WorkDo has many tools that require different members within the workplace to take on the roles of Tool Admin or HR Staff to manage information. Please read the description of the roles for each tool carefully when assigning tool roles to each member within the workplace.

There are four types of roles in CRM, including No Role, Member, Premium Member and Tool Admin. Members are able to view contacts they created, Premium Members are able to view the contacts created by themselves, as well as Members'. And the Tool Admins are able to view all the contacts. Upon tool activation, the system will automatically assign all everyone as a Member; you will then have the workplace admins manually assign Premium Member(s) or Tool Admin(s). If your tool authority is set to No Role, the CRM tool will not appear in your tool box.

Manage Tool Roles

1. Ask the workplace admins to go to the Workplace page.
2. Click the Workplace Settings.
3. Click the Tool Box and the Advanced tab is available for you to activate, deactivate and manage tools.
4. Make sure the CRM is activated, then click Manage.
5. Click Manage All Member Roles.
6. Use the search bar quickly locate the members for role changes.
7. Click the drop down menu and edit members' roles, repeat until all roles have been assigned correctly.

STEP 2. Start

The CRM tool provides a safe and secure way for your team to effectively manage customer information, as well as document the back and forth exchanges. This tool will facilitate your team in managing multiple clients with ease and peace of mind that will surely strengthen your team's relationships with your precious clients.

a. Create a Contact List

All members are able to create and maintain their contact lists by following the steps below.

Create a Contact

1. Click Workplace > Do > CRM
2. Click Contact List on the left of the menu.
3. Click the + Create button and fill out the necessary fields (* must be filled).
 - Basic Info: Name, Contact Photo, Phone and Email
 - Current Work Info: Company, Title and Address.
 - Others
 - ➡ Description: Additional remarks can be left here.
 - Phone List / Email List
 - Social Information: Save a contact's social network information.
4. Click the Save button to finish.



You will be assigned as the Contact Owner when creating a contact, this can later be changed in [Edit Contacts](#).

b. Import Contacts from Smartphone

You can import contacts from your smartphone by following the steps below.

Import Contacts from Smartphone

1. Open up the WorkDo app on your smartphone.
2. Click Do > CRM > Contact List from the Workplace page.
3. Click the edit icon on the lower right corner and select import.
4. Select the contact you wish to import then click Import.

c. View Contact Information

Refer to the steps below to look up clients' contact information.

View Contact Information

1. View all contacts by clicking Workplace > Do > CRM > Contact List.
2. Search criteria are available to quickly locate contacts.
 - Search by name or company.
 - Click the downward arrow to use the advanced search options.
 - Click the X icon to reset and empty all fields.
3. Click the magnifying glass icon to search.



Who can view my contact information?

As established in [STEP 1-b](#), different tool roles will be able to view different information.

- Member: Members are limited on creating and viewing their own contacts, and their contact lists are independent and not shared among members.
- Premium Member: Premium Members are able to manager their own and Member-level' s contact lists, but each premium member' s contact list is independent and not shared among premium members.
- Tool Admin: Able to view all the contacts created by all members.

d. Edit Contacts

Edit Contacts

1. Follow Step 2-c [View Contact Information](#) and select the contact you would like to edit.
2. Click the edit icon on the left of the contact or click contact to view its information and click the edit button on the bottom of the page to edit.
3. Edit contact information (* must be filled).
4. Click on the Save button to finish.

e. Delete Contacts

Delete Contacts

1. Follow Step 2-c [View Contact Information](#) and select the contact you would like to delete.
2. Check the boxes on the left of the contacts you wish to delete, and then click the delete button.
3. A screen prompt will show up, press Confirm to complete.



Deleting a contact will erase all information pertained to this contact.

f. Document Contact Activities

This feature can be used to document exchanges between you and your contacts. It can serve as personal notes, as well as a form of progress report for your managers to promptly ascertain the current situation with the contacts. Depending on your preference, you could either create activities by their types or by contacts.

Create a Contact Activity

1. Create an activity.
 - By contact
 - ➔ Follow Step 2-c [View Contact Information](#) and select a contact to add an activity.
 - ➔ Click on a contact to view its details.
 - ➔ Click the Create button by the Activity tab to add an activity.
 - By activity type
 - ➔ Click Workplace > Do > CRM > Activity.
 - ➔ Select an activity type.
 - ➔ Click the + Create button.
2. Fill out the necessary fields.
3. Click the Save button to finish.

g. View Contact Activities

Contact activities are viewable either by types or by contacts.

View Contact Activities

- By contact
 1. Follow Step 2-c [View Contact Information](#) and select a contact to view activities.
 2. Click on a contact to view its details.
 3. Scroll down to the Activity tab
 4. Select an activity to view its detail.
- By activity type
 1. Click Workplace > Do > CRM > Activity.
 2. Select an activity type.
 3. Use the filters to narrow down your search.
 4. Select an activity to view its detail.



Tips

The weekly and monthly filters are readily available to instantly filter out past records and quickly locate the activities you are looking for within the time frame.

h. Edit Activity Contents

Edit Activity Contents

1. Follow Step 2-g [View Contact Activities](#) to select an activity you wish to edit.
2. Click the edit icon on the left of the activity or click the edit button on the activity detail page to edit.
3. Edit contents.
4. Click Save to finish.

i. Task Activity

Task activities can be used to track progresses between clients; a task will be assigned a Complete and Incomplete status to it, this is especially useful for the managers to view the exchanges you had to quickly assess the situation.

Task Activity Update

1. Follow Step 2-g [View Contact Activities](#) to select a task activity you wish to update.
2. Update
 - Single update: Check the activity box and then select the Complete Task status to update.
 - Batch update: Check the applicable activity boxes and then select the Complete Task status to batch update.

j. Delete Activities

Delete Activities

1. Follow Step 2-g [View Contact Activities](#) to select an activity you wish to delete.
2. Check the applicable activity boxes and then select the delete icon to delete activities.
3. A Screen prompt will show up, click Confirm to complete.

