NeuroCRM

User Guide

Onboarding & Daily Operations Manual

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01 Introduction

Welcome to NeuroCRM

NeuroCRM is a modern customer relationship management platform built to help sales, marketing, and project teams manage contacts, leads, deals, and projects in one place. This guide walks you through every part of the system, from your first login to the daily tasks you will use most often.

Purpose of the CRM

NeuroCRM centralizes customer data, sales activity, and team collaboration so that nothing important gets lost across spreadsheets, inboxes, or chat threads. It gives your team a single, shared view of every contact, deal, and project.

Who Should Use It

- Sales representatives managing leads and pipelines
- Customer support and account managers
- Project and task managers coordinating team work
- Marketing teams tracking communication and campaigns
- Business owners who need visibility into performance

Key Benefits

Centralized Records
Faster Follow-Ups
Team Collaboration
Clear Pipeline Visibility
Actionable Reports

TIP

Keep this guide handy during your first two weeks in NeuroCRM — most questions new users ask are answered in Sections 2 through 9.

02 Getting Started

Logging In

Purpose: Access your NeuroCRM account securely.

1. Open your web browser and go to your company's NeuroCRM login URL.
2. Enter your registered email address.
3. Enter your password.
4. Click **Log In**.

Insert Login Screen Screenshot

Login page with email, password fields, and Log In button

Expected Result: You are redirected to your Dashboard.

Reset Password

1. On the login page, click **Forgot Password?**
2. Enter your registered email address.
3. Check your inbox for a password reset link.
4. Click the link and create a new password.

NOTE

Password reset links expire after 30 minutes for security reasons. If your link expires, simply request a new one.

Dashboard Overview

After logging in, you will land on your personal Dashboard. This is your home base, showing key metrics, recent activity, and shortcuts to common tasks.

Insert Dashboard Screenshot

Main dashboard view immediately after login

User Profile

1. Click your profile avatar in the top-right corner.
2. Select **My Profile**.
3. Update your name, photo, job title, and contact details.
4. Click **Save Changes**.

Changing Password

1. Go to **Profile > Security**.
2. Enter your current password.
3. Enter and confirm your new password.
4. Click **Update Password**.

Notifications

NeuroCRM notifies you about lead assignments, task due dates, mentions, and system updates. Manage delivery preferences from **Profile > Notifications**.

TIP

Enable email notifications for lead assignments so you never miss a new opportunity, even when you are away from your desk.

03 Dashboard

Purpose: The Dashboard gives you an at-a-glance summary of your CRM activity so you can prioritize your day quickly.

Insert Dashboard Screenshot (Full View)

Annotated dashboard with cards, navigation, and widgets labeled

Dashboard Cards

Cards at the top of the dashboard summarize key numbers such as Total Leads, Open Deals, Active Projects, and Tasks Due Today. Each card updates in real time.

Recent Activities

This panel lists the latest actions across your account — new contacts added, deals moved, tasks completed — so you can stay in sync with your team.

Quick Actions

Quick Action buttons let you create a new Contact, Lead, Task, or Deal without leaving the dashboard.

+ New Contact | + New Lead | + New Task | + New Deal

Navigation Menu

The left-hand sidebar provides access to every module: Contacts, Leads, Pipeline, Projects, Tasks, Calendar, Reports, and Settings.

Search

The global search bar at the top of the screen lets you find any contact, lead, deal, project, or task by name in seconds.

Widgets

Widgets are configurable panels — such as pipeline charts and upcoming meetings — that you can rearrange to fit how you work.

> **TIP**
>
> Click the icon in the top-right of any widget to resize, hide, or reorder it.

> **Expected Result:** You can locate any key metric or recent update within a few seconds of opening the dashboard.

04 Contact Management

Purpose: Store and organize every person you do business with in one searchable place.

Insert Contacts Screen Screenshot

Create Contact

1. Navigate to **Contacts** in the sidebar.
2. Click **+ New Contact**.
3. Enter name, email, phone, and company details.
4. Click **Save**.

Edit Contact

1. Open the contact record.
2. Click **Edit**.
3. Update the required fields and click **Save Changes**.

Delete Contact

1. Open the contact record.
2. Click the ⋮ menu and select **Delete**.
3. Confirm the deletion.

WARNING

Deleting a contact permanently removes its history and cannot be undone. Consider archiving instead if you may need the record later.

Search Contacts

Use the search bar at the top of the Contacts list to find a record instantly by name, email, or company.

Filter Contacts

Use the Filter panel to narrow contacts by owner, tag, location, or date added.

Import Contacts

1. Click **Import** at the top of the Contacts page.
2. Upload a CSV file.
3. Map your columns to NeuroCRM fields.
4. Click **Start Import**.

Export Contacts

Select contacts and click **Export** to download them as a CSV file for backups or offline use.

Best Practices

- Keep contact details up to date after every interaction.
- Use tags to group contacts by industry or campaign.
- Avoid duplicate entries — use search before creating a new contact.

> **Expected Result:** A clean, de-duplicated contact list that your whole team can rely on.

05 Lead Management

Purpose: Track potential customers from first contact through qualification.

Insert Leads Screen Screenshot

Create Lead

1. Go to **Leads** in the sidebar.
2. Click **+ New Lead**.
3. Enter the lead's name, source, and contact details.
4. Click **Save**.

Assign Lead

1. Open the lead record.
2. Click **Assign**.
3. Choose a team member and click **Confirm**.

Lead Status

Leads move through statuses such as New, Contacted, Qualified, and Unqualified. Update the status as you progress each conversation.

Convert Lead

1. Open a qualified lead.
2. Click **Convert to Deal**.
3. Confirm the pipeline stage and click **Convert**.

Expected Result: A matching Contact and Deal are created automatically, and the Lead is marked Converted.

Search Leads / Filter Leads

Use the search bar or the Filter panel to locate leads by owner, status, source, or date created.

Lead Notes

Add notes to a lead record to capture call outcomes, preferences, or objections raised.

Lead History

Every status change, note, and assignment is logged automatically in the lead's activity timeline.

TIP

Respond to new leads within the first hour whenever possible — response speed strongly affects conversion rates.

06 CRM & Customer Records

Purpose: Give every team member a complete view of each customer relationship.

Insert Customer Record Screenshot

Customer Records

A Customer Record combines contact details, deal history, projects, and communications into a single profile.

Customer Details

The Details tab shows company information, key contacts, account owner, and lifecycle stage.

Communication History

All emails, calls, and messages linked to the customer appear in chronological order, so anyone on the team can catch up instantly.

Attachments

Upload contracts, proposals, or reference files directly to the customer record from the **Attachments** tab.

Notes

Add internal notes visible only to your team to capture context that should not go to the customer directly.

Status

Track the customer's lifecycle status — such as Prospect, Active, or Churned — to guide account strategy.

NOTE

Only users with the correct permission level can edit customer status. See Section 16, Security, for details on role permissions.

07 Sales Pipeline

Purpose: Visualize and manage every deal from first contact to close.

Insert Pipeline Screen Screenshot

Opportunity Stages

Deals move through stages such as New, Qualified, Proposal Sent, Negotiation, Won, and Lost.

Move Deals

1. Open the **Pipeline** view.
2. Click and drag a deal card to the next stage column.
3. Confirm any required fields, such as close date.

Pipeline View

The Kanban-style board shows all deals grouped by stage, with total value displayed at the top of each column.

Deal Details

Click any deal card to view value, close date, owner, linked contact, and activity history.

Sales Progress

A progress bar on each deal shows how far along it is in your sales process based on its current stage.

Pipeline Filters

Filter the pipeline by owner, stage, value range, or expected close date to focus on what matters most.

> **TIP**
>
> Review deals with no activity in the last 7 days at the start of each week to keep your pipeline healthy.

Expected Result: An always-current view of pipeline value and deal stage for accurate forecasting.

08 Project Management

Purpose: Coordinate delivery work after a deal is won.

Insert Projects Screen Screenshot

Create Project

1. Go to **Projects** in the sidebar.
2. Click **+ New Project**.
3. Enter a project name, client, and start/end dates.
4. Click **Create Project**.

Assign Team

1. Open the project.
2. Click **Team** and select members to add.
3. Set each member's role on the project.

Add Milestones

Break the project into milestones with target dates so progress can be tracked at each phase.

Track Progress

The project progress bar updates automatically as linked tasks are completed.

Project Status

Set the overall status — Not Started, In Progress, On Hold, or Completed — to keep stakeholders informed.

TIP

Link tasks to milestones so the milestone automatically updates as tasks are checked off.

09 Task Management

Purpose: Break work into clear, trackable action ✅ items.

Insert Tasks Screen Screenshot

Create Task

1. Go to **Tasks** in the sidebar.
2. Click **+ New Task**.
3. Enter a title and description.
4. Click **Save Task**.

Assign User

Select a team member from the **Assignee** field so ownership is always clear.

Due Dates

Set a due date so the task appears on the assignee's calendar and in reminder notifications.

Priorities

Mark tasks as Low, Medium, High, or Urgent to help your team focus on what matters most.

Status

Track progress using statuses such as To Do, In Progress, and Done.

Comments

Use the comment thread on each task to discuss details without leaving the record.

Attachments

Attach files directly to a task so reference material stays with the work.

> **TIP**
>
> Use the Board view to drag tasks between To Do, In Progress, and Done for a quick visual overview.

10 Calendar

Purpose: Keep meetings, deadlines, and reminders in one shared view.

Insert Calendar Screen Screenshot

Create Event

1. Go to **Calendar** in the sidebar.
2. Click a date, or click **+ New Event**.
3. Enter a title, date, time, and location or link.
4. Click **Save**.

Meetings

Link a meeting to a contact, deal, or project so attendees and outcomes are recorded automatically.

Reminders

Set reminders to notify you and attendees 15 minutes, 1 hour, or 1 day before an event.

Scheduling

Check team members' availability directly in the Calendar before booking a shared meeting.

> **NOTE**
>
> Calendar entries linked to a deal automatically appear in that deal's activity timeline.

11 Communication

Purpose: Keep every internal and customer-facing conversation connected to the right record.

Insert Communication Screen Screenshot

Internal Messages

Use built-in messaging to discuss a contact, deal, or task directly with teammates without switching apps.

Email Features

Send and log emails from within NeuroCRM. Every email is automatically attached to the related contact record.

Notifications

Stay informed with in-app and email notifications for mentions, assignments, and status changes.

Activity Feed

The Activity Feed shows a real-time stream of updates across your team, so nothing important slips by.

TIP

Use @mentions in comments to notify a specific teammate instantly.

12 Reports & Analytics

Purpose: Turn CRM activity into insights you can act on.

Insert Reports Screen Screenshot

Generate Reports

1. Go to **Reports** in the sidebar.
2. Choose a report type, such as Sales Performance or Lead Source.
3. Select a date range.
4. Click **Generate**.

Filters

Refine any report by owner, team, region, or custom field to answer specific business questions.

Export Reports

Click **Export** to download a report as CSV or PDF for offline sharing.

Dashboard Charts

Pin key charts to your dashboard so the metrics you check most often are always one click away.

> **TIP**
>
> Schedule a weekly report email to keep your manager updated automatically.

13 AI Features

NOTE

NeuroCRM uses AI to improve user productivity inside existing CRM workflows.

AI in NeuroCRM is not a standalone product. It is built directly into the modules you already use — Contacts, Leads, Pipeline, and Tasks — to help you work faster within your regular workflow.

Insert AI Assistance Screenshot

AI Writing Assistance

Get suggested phrasing for emails, notes, and follow-up messages directly inside the record you are working on.

Smart Search

Find contacts, deals, and tasks faster using natural, everyday language in the search bar.

Content Suggestions

Receive suggested next steps and talking points based on the information already in a record.

Quick Navigation

Jump to the right screen or record faster with AI-assisted shortcuts in the search bar.

Contextual Recommendations

See relevant suggestions, such as a recommended next task, based on the current record you are viewing.

TIP

> AI suggestions are optional starting points — always review them before sending anything to a customer.

14 White Label

Purpose: Present NeuroCRM as your own branded platform to clients and partners.

Insert White Label Branding Screenshot

Example of a client portal shown with a custom logo, domain, and color scheme

Custom Logo

Upload your own logo to replace the default NeuroCRM branding across the interface.

Custom Domain

Connect your own domain, such as crm.yourcompany.com, so clients access the platform under your brand.

Brand Colors

Set primary and accent colors to match your company's brand guidelines across every screen.

Client Portal

Give clients a branded portal to view shared projects, invoices, and updates without seeing NeuroCRM branding.

Brand Identity

Combine your logo, domain, and colors for a fully consistent, professional client-facing experience.

> **TIP**
>
> Configure white label settings before inviting clients to the portal for the first time, so their initial impression is fully on-brand.

15 User Settings

Purpose: Personalize your account and control how NeuroCRM communicates with you.

Insert Settings Screen Screenshot

Profile

Update your name, photo, title, and contact details from **Settings > Profile**.

Password

Change your password anytime from **Settings > Security**.

Preferences

Set your time zone, date format, and default landing page.

Notifications

Choose which alerts you receive by email, in-app, or both.

16 Security

Purpose: Protect your account and your customers' data.

Password Tips

- Use at least 12 characters with a mix of letters, numbers, and symbols.
- Never reuse passwords from other services.
- Change your password immediately if you suspect it has been compromised.

Session Timeout

NeuroCRM automatically logs you out after a period of inactivity to protect your account on shared devices.

Role Permissions

Role	Typical Access
Admin	Full access to all records, users, and settings
Manager	Team-wide access to contacts, leads, and reports
Sales Rep	Access to assigned contacts, leads, and deals
Viewer	Read-only access to shared records

Account Protection

Enable two-factor authentication where available, and avoid sharing your login credentials with anyone.

WARNING

Never share your password over email or chat, even with support staff. NeuroCRM will never ask for your password directly.

17 Frequently Asked Questions

Q. How do I reset my password?

Click Forgot Password on the login page and follow the emailed reset link.

Q. Can I import contacts from a spreadsheet?

Yes. Use the Import tool on the Contacts page to upload a CSV file.

Q. How do I assign a lead to a teammate?

Open the lead record and click Assign to choose a team member.

Q. What happens when I convert a lead?

NeuroCRM automatically creates a matching Contact and Deal record for you.

Q. Can I customize the pipeline stages?

Admins can add, rename, or reorder stages from Pipeline Settings.

Q. How do I create a recurring task?

When creating a task, enable the Repeat option and set your desired frequency.

Q. Is my data backed up?

Yes, NeuroCRM performs automated backups on a regular schedule.

Q. Can I use NeuroCRM on mobile?

Yes, NeuroCRM is fully responsive and works in mobile browsers.

Q. How do I export a report?

Open the report and click Export to download it as CSV or PDF.

Q. Who can see my notes on a record?

Notes are visible to your team by default, based on your assigned role permissions.

Q. How do I change my notification settings?

Go to Profile > Notifications and choose your preferred delivery methods.

Q. Can I white label NeuroCRM for my clients?

Yes, see Section 14 for custom logo, domain, and brand color options.

Q. What should I do if a page won't load?

Refresh the page and check your internet connection; see Section 18 for more steps.

Q. How do I delete a record permanently?

Open the record, click the ⋮ menu, and select Delete. This action cannot be undone.

Q. Who do I contact for further help?

Reach our support team using the details in Section 20, Support.

18 Troubleshooting

Issue	Suggested Fix
Cannot Login	Confirm your email and password are correct, check Caps Lock, and try Forgot Password if needed.
Forgot Password	Click Forgot Password on the login page and follow the reset link sent to your email.
Page Not Loading	Refresh the page, clear your browser cache, or try a different browser.
Permission Errors	Contact your account Admin to confirm your role has access to that feature.
Missing Data	Check applied filters — data may simply be hidden by a filter rather than missing.
Slow Performance	Close unused browser tabs, check your internet connection, and try again.

TIP

Most issues are resolved by refreshing the page or logging out and back in. Try this first before contacting support.

19 Best Practices

Daily CRM Workflow

- Start each day by reviewing your Dashboard and Recent Activities.
- Check tasks due today and update their status as you complete them.
- Review new leads assigned to you and respond promptly.

Lead Management Tips

- Respond to new leads as quickly as possible.
- Log every call or email as a note on the lead record.
- Update lead status immediately after each interaction.

Project Organization

- Break every project into clear milestones before work begins.
- Assign an owner to every milestone and task.
- Review project status weekly with your team.

Task Prioritization

- Set realistic due dates and priorities for every task.
- Focus on Urgent and High priority tasks first each day.

Data Accuracy

- Search before creating a new record to avoid duplicates.
- Keep contact and company details current.
- Use consistent naming conventions across your team.

20 Support

Our support team is here to help whenever you get stuck.

Channel	Details
Support Email	support@neurocrm.com
Phone	+1 (800) 555-0142
Website	www.neurocrm.com/support
Business Hours	Monday – Friday, 9:00 AM – 6:00 PM (Local Time)

NOTE

Sample contact details shown above — replace with your organization's actual support information before distributing this guide.

21 Glossary

CRM — Customer Relationship Management; software used to manage interactions with customers and prospects.

Lead — A potential customer who has not yet been qualified.

Contact — A person or company record stored in the CRM.

Deal — A sales opportunity being tracked through the pipeline.

Pipeline — The visual set of stages a deal moves through before closing.

Opportunity — Another term for a Deal in progress.

Project — A body of delivery work created after a deal is won.

Task — A single, trackable action item assigned to a user.

Report — A generated summary of CRM data over a chosen time period.

Dashboard — The home screen showing key metrics and recent activity.

22 Revision History

Version	Date	Author	Changes
1.0	July 25, 2026	NeuroCRM Documentation Team	Initial release of the NeuroCRM User Guide

NC

Thank you for using NeuroCRM