CircleOne CRM

User Manual- 📌 *A comprehensive guide to using CircleOne CRM efficiently.*

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About this manual:

Welcome to the CircleOne CRM User Manual. This guide is designed to help you navigate and utilize CircleOne CRM efficiently. Whether you are a new user or an experienced professional, this manual provides step-by-step instructions and best practices to enhance your CRM experience.

Table of Contents:

Introduction:

CircleOne CRM is a powerful customer relationship management tool developed by **Botgo Pvt Ltd**. It is designed to streamline sales, customer interactions, and workflow automation, providing businesses with an efficient way to manage client relationships.

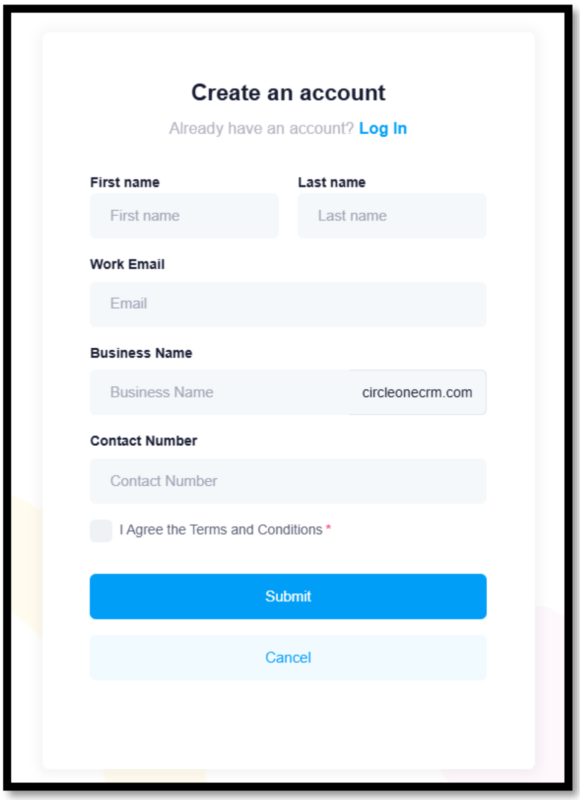
Key Benefits:

- Centralized Customer Data
- Sales Pipeline Management
- Workflow Automation
- Real-time Analytics & Reports
- Enhanced Collaboration Tools

This manual will guide you through each feature and provide best practices to maximize productivity.

Getting Started:

Sign up with your business details on our registration page. The email address you provide will be set as the default admin. Please use a support or admin email associated with your company, such as “admin@companyname.com”.



You must verify your registration by clicking the link sent to your registered email address. After completing registration and verifying your tenant, you can log in using the initial password sent to your email. You will be required to change this password upon your first login.

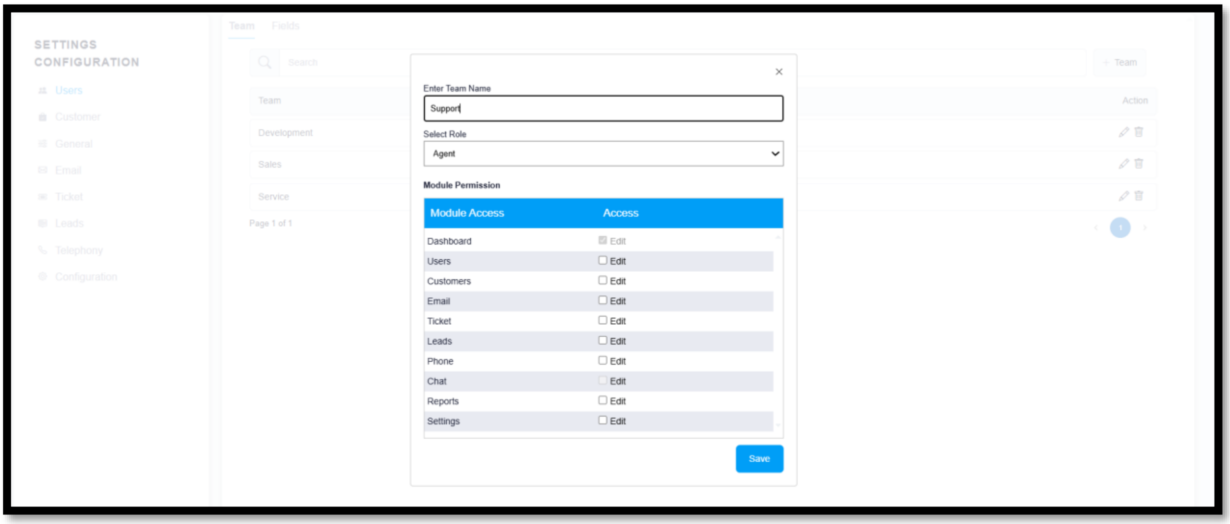
Circle-One is designed to provide businesses with the flexibility to customize the product according to their specific processes. The Settings option allows you to configure various aspects of your business operations within the platform.

After logging in, go to Settings to configure the process and setup. There, you'll find all the modules where you can customize your required business processes.

Settings ->Users->

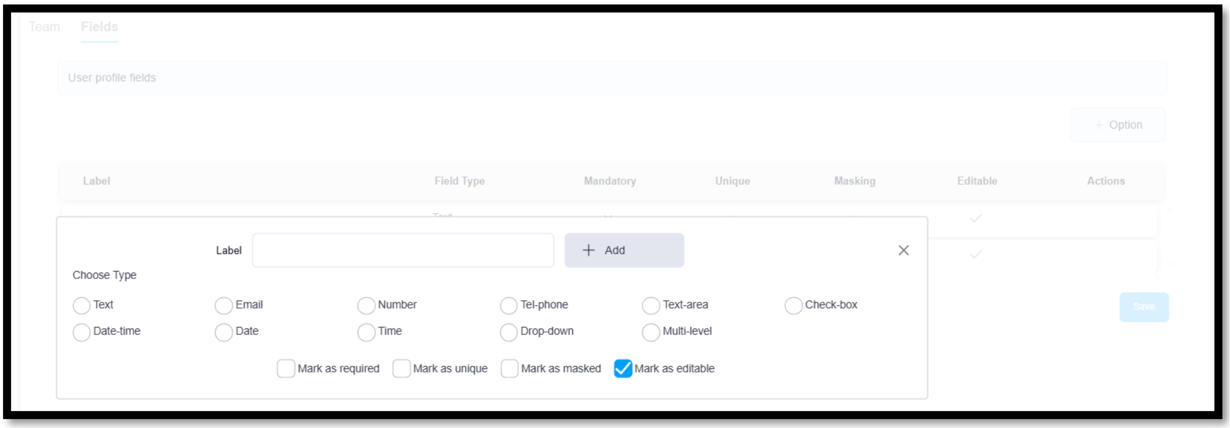
Users: The "Users" option includes two configurable settings: Teams and Fields.

- **Teams:** While creating teams, you can assign access rights based on modules, aligning with the predefined roles in the application—Agent and Manager.



- **Fields**: These represent the input fields for user details. You can create labels and define the field types required when adding new users. You can also define additional properties for each field, such as:
  - **Mandatory**: Requires the field to be filled in.
  - **Unique**: Ensures the field value is not duplicated.
  - **Editable**: Determines if the field can be modified after creation.
  - **Masked**: Hides the field content for security purposes.

  You can also rearrange the sequence of the fields after they have been created.

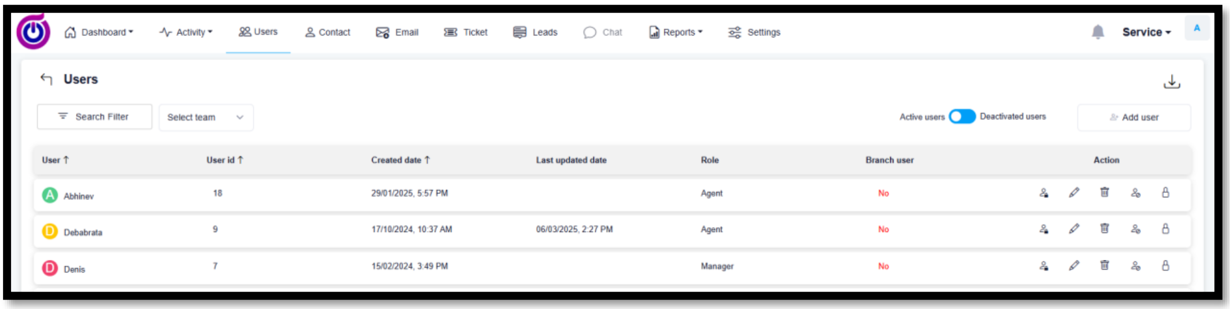


User module – To create a user, click on **Users** in the top menu bar, then select **Add User**. Enter the user details, assign a specific role, and grant access to one or multiple teams within the user profile.
The initial login password for a user will follow the format: “**Username@123**”. For example, if the username is Rahul, the initial password will be “Rahul@123”. Upon first login, the user will be prompted to change the password. The login URL for users will be the same as the one used by the admin.

In this section, you can also:

- **Edit User Profile**: Modify user details as needed.
  - **Change/Edit Teams**: Update team assignments.
  - **Change/Edit Roles**: Adjust user roles between **Agent** and **Manager**.

- **Delete User**: Possible but **not recommended**, as it may impact associated data.
- **Deactivate User**: Users can be deactivated for **7 days or more** if needed.
- **Release Session**: Admins can manually release a user's session if required.
- **Reset Password**: Admins can reset a user's password if required.



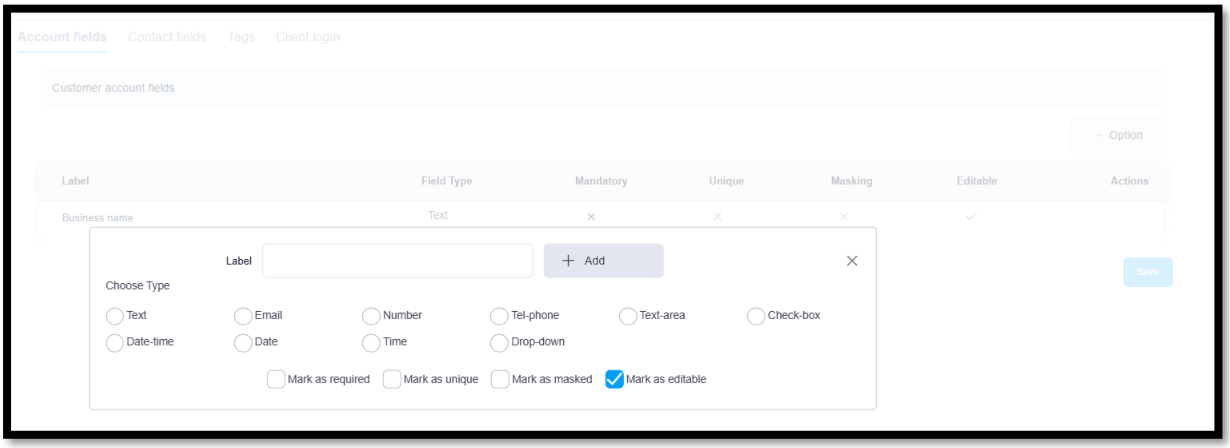
Settings ->Customer->

Customers: The "Customer" option includes three configurable settings: Account fields, Contact fields & Tags.

- **Account fields:** These represent the input fields for account/company details. You can create labels and define the field types required when adding new users. You can also define additional properties for each field, such as:
  - **Mandatory**: Requires the field to be filled in.
  - **Unique**: Ensures the field value is not duplicated.
  - **Editable**: Determines if the field can be modified after creation.
  - **Masked**: Hides the field content for security purposes.

  You can also rearrange the sequence of the fields after they have been created.

  Settings->Customers->Account fields

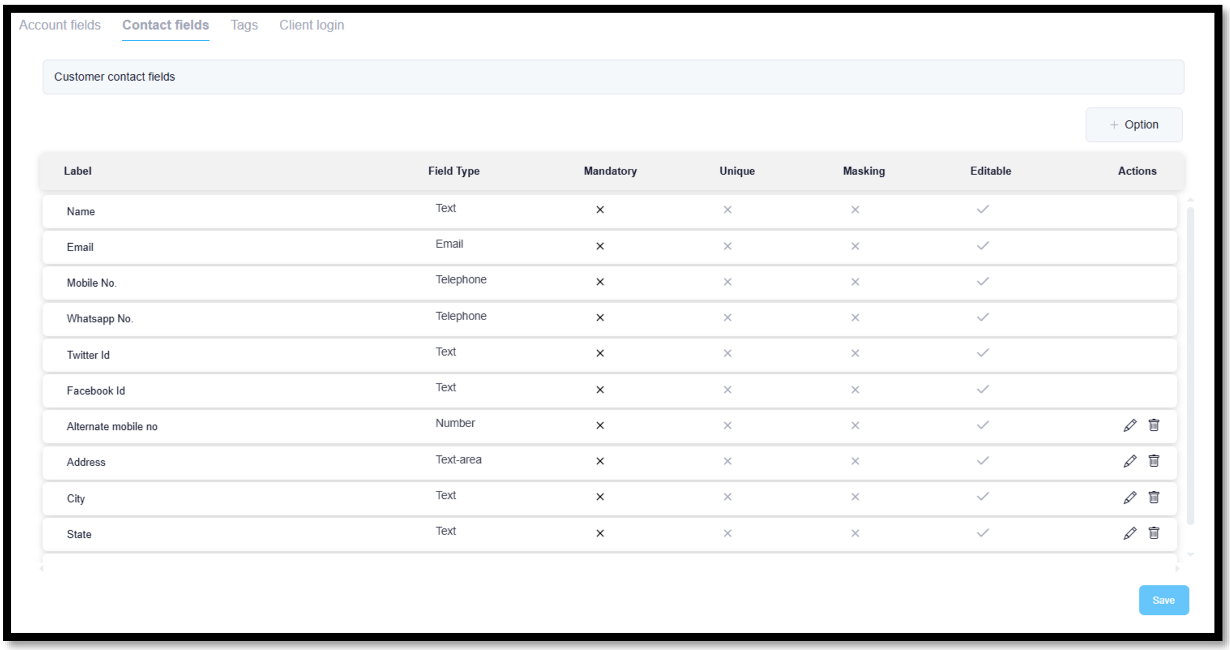


- **Contact fields:** These represent the input fields for contact details. You can create labels and define the field types required when adding new users. You can also define additional properties for each field, such as:
  - **Mandatory**: Requires the field to be filled in.
  - **Unique**: Ensures the field value is not duplicated.
  - **Editable**: Determines if the field can be modified after creation.

- **Masked**: Hides the field content for security purposes.

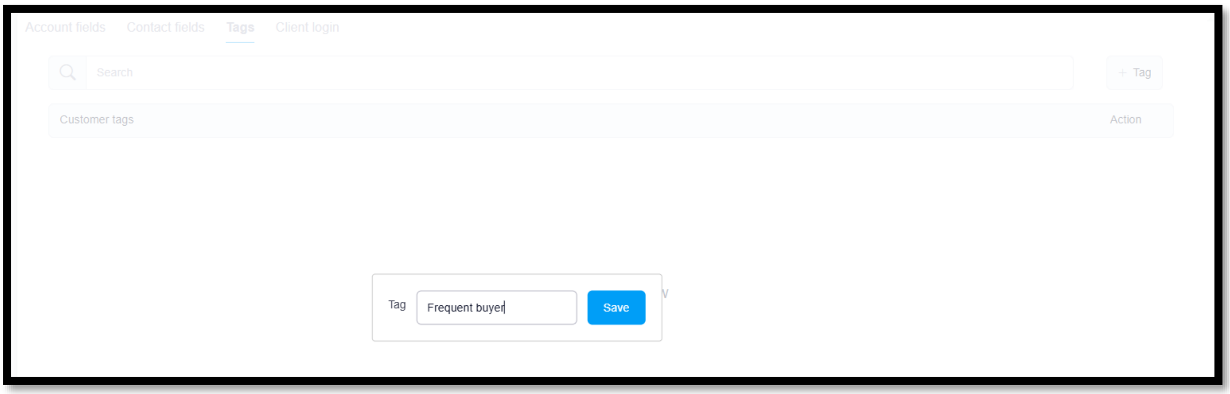
You can also rearrange the sequence of the fields after they have been created.

Settings->Customers->Contact fields



- **Tags**: Tags will allow you to categorize contacts or accounts based on priority for services. For example, you can label a customer as VIP, Frequent Customer, or Platinum Customer. These tags can be added from this panel.

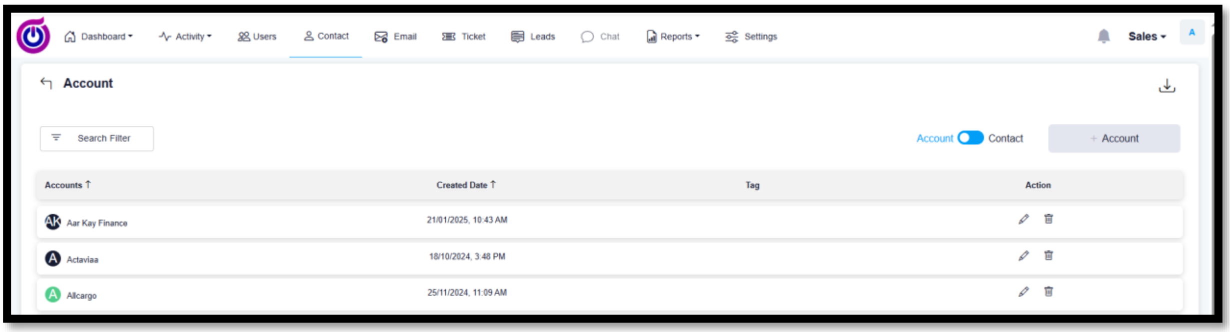
Settings->Customer->Tags



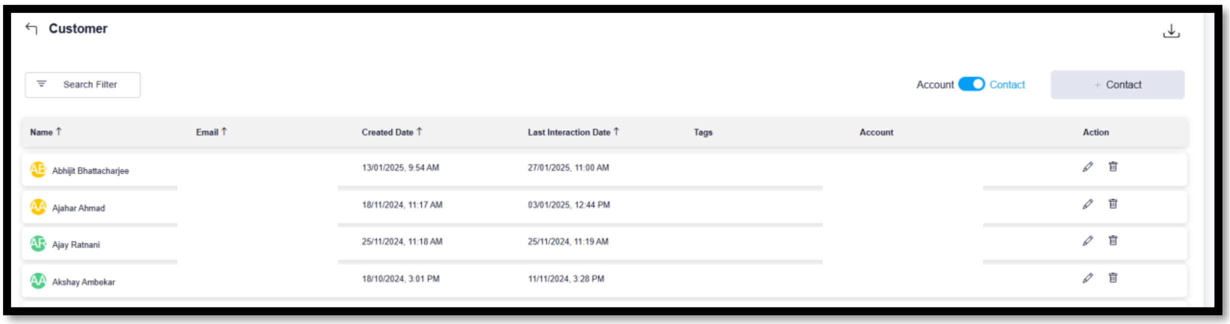
Customer Module: Once the Customer Module is configured, users can create Account/Company details or Contact details in this section. To create a contact/account, click on "**Customer**" in the top menu bar, here, you can:

- Add Contacts and Accounts with respective Tags, if applied.
- Search for specific contacts or accounts.
- Download contact and account data from this panel.

Accounts



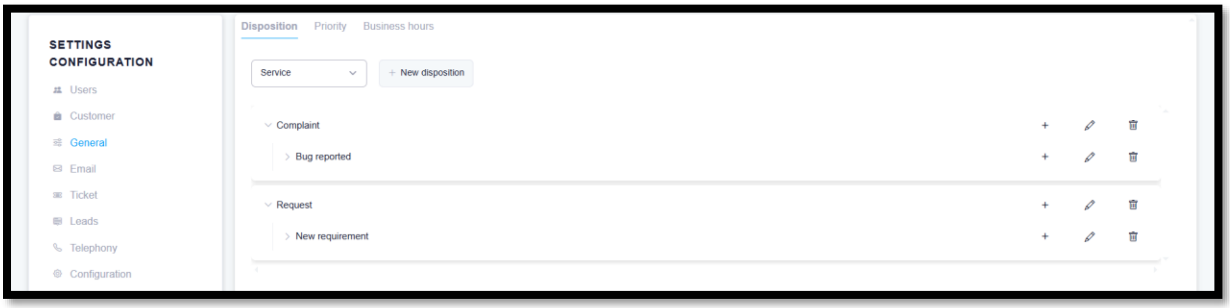
Contact



General: The "General" option includes three configurable settings: Disposition, Priority and Business hours.

- **Disposition:** Disposition helps categorize interactions and can be defined as a multi-level dropdown.
  - Team-wise Dispositions: Different teams can have their own specific dispositions.
  - Edit & Delete: Dispositions can be modified or removed if needed. (Deleting a Disposition is not recommended, as it will also remove any associated data linked to that disposition.

Settings->General->Disposition



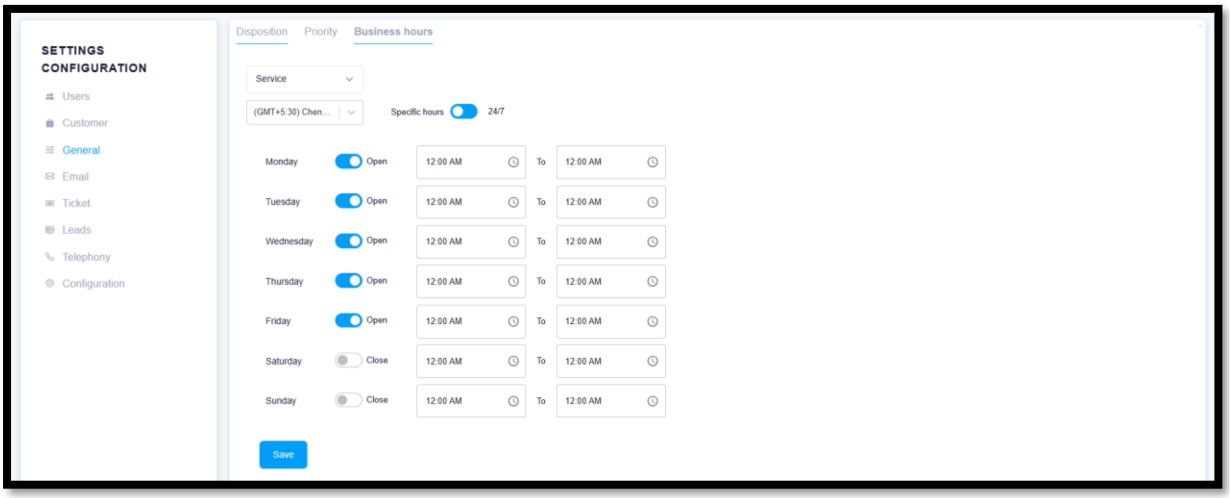
- **Priority:** You can define the priority of a ticket or issue type based on its categorization or disposition, allowing you to clearly differentiate critical issues from regular ones. The default priority levels are:
  - Urgent
  - High
  - Medium
  - Low

These priorities can be assigned to each Disposition/Issue Type to ensure proper handling.

Settings->General->Priority

- **Business Hours:** Every business process follows specific operational guidelines, and various business rules can be configured team-wise in Circle-One to help control and organize operations. Key configurations include:
  - **Business Hours**: Define working hours to manage ticket allocation and Service Level (SL) compliance.
  - **Flexible Scheduling**: Set specific working hours or a 24x7 setup based on operational needs.
  - **Team-Specific Hours**: Each team can have its own custom business hours.

Settings->General->Business hours



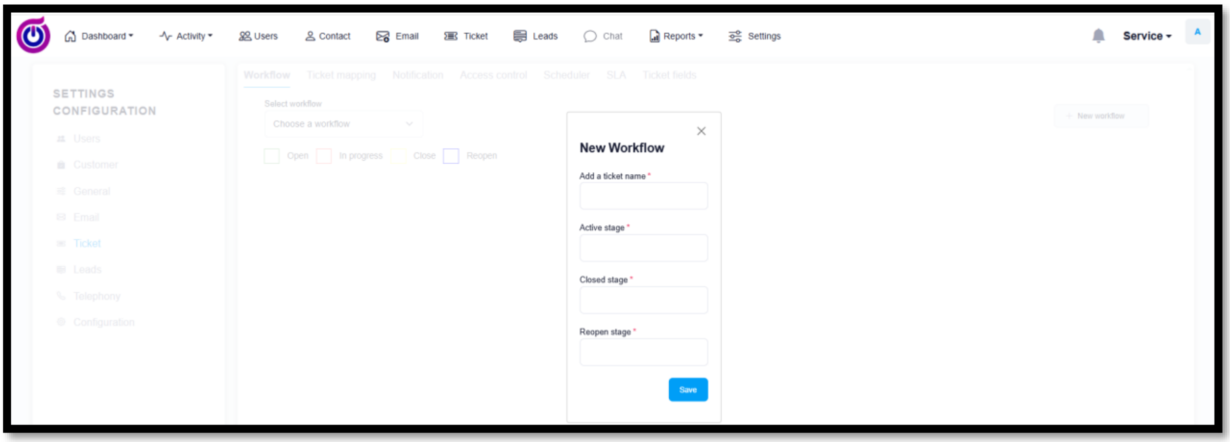
Ticket: The "Ticket" option includes seven configurable settings: Workflow, Mapping, Ticket fields, Notifications, SL (Service level), Access control, Scheduler.

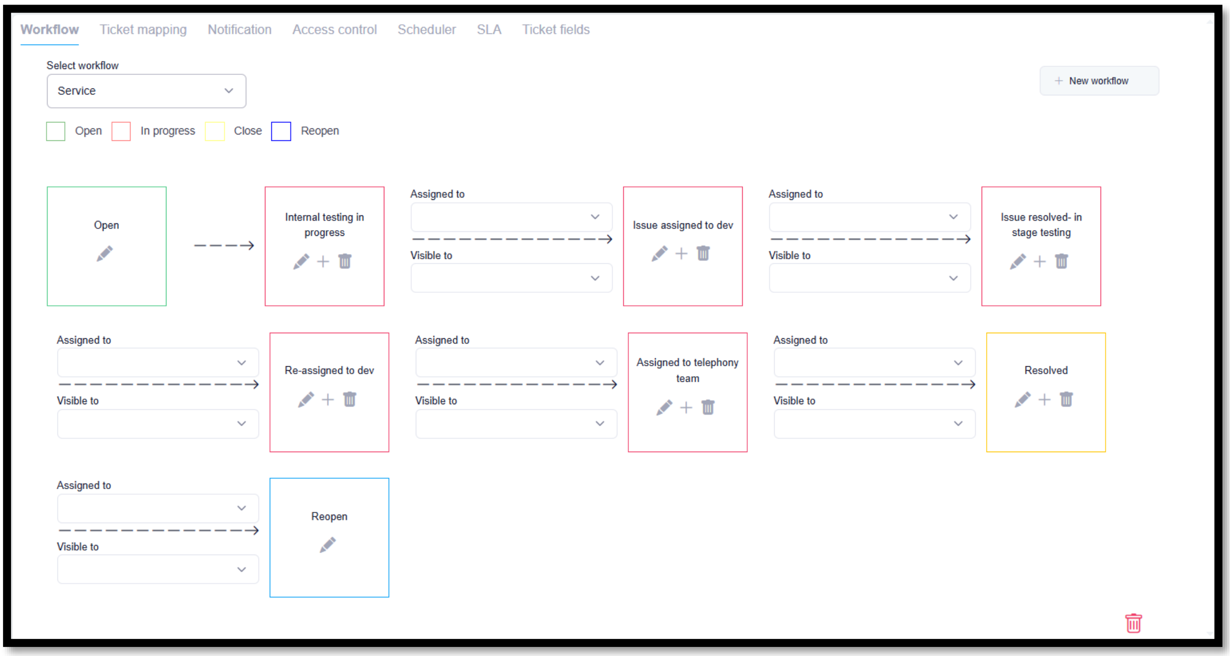
- **Workflow**: A structured process that helps manage customer issues, inquiries, or service requests efficiently, ensuring that none are overlooked.
  Resolving customer queries involves multiple interdependencies between teams. A predefined workflow simplifies the agent's task by automatically allocating tickets to the appropriate team based on the process flow. Additionally, tickets can also be assigned manually when necessary or as per the configured access control.

  The statuses are primarily categorized into four types: **Active, In Progress, Closed, and Reopen**.
  - You can customize the labels for these statuses.
  - Multiple **"In Progress"** and **"Closed"** statuses can be defined as needed.
  - Every update can trigger **auto-allocation** to a specific team if configured.

- Multiple such workflows can be defined to streamline ticket management.

Settings->Ticket->Workflow





You can add, edit, and delete any information as needed. However, once a workflow is created and tickets are assigned to it, deleting the workflow is not recommended, as it may result in data loss for those tickets.

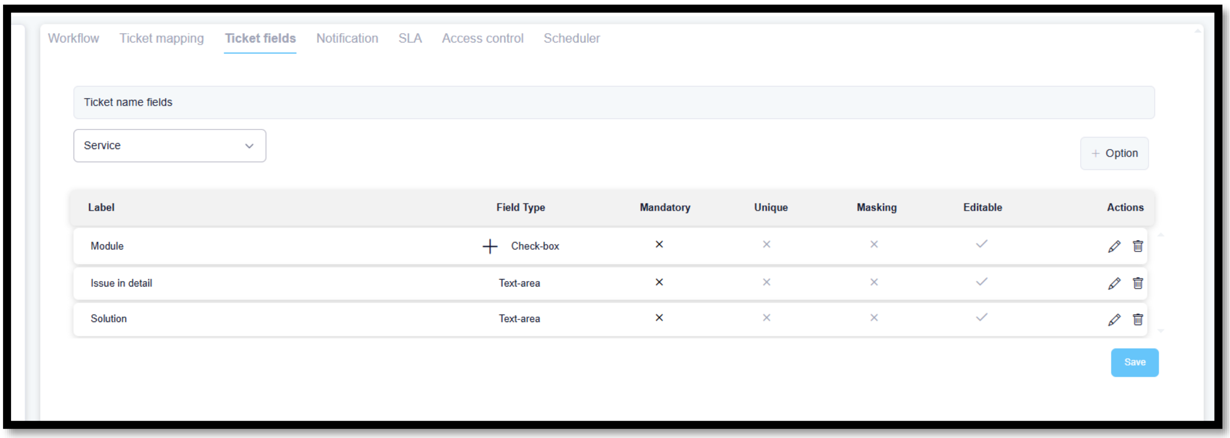
- **Mapping**: Dispositions are to be assigned to the appropriate workflow.

  Settings->Ticket->Mapping

- **Ticket Fields**: These represent the input fields for ticket details. You can create labels and define the field types required while creating a new ticket. You can also define additional properties for each field, such as:
  - **Mandatory**: Requires the field to be filled in.
  - **Unique**: Ensures the field value is not duplicated.
  - **Editable**: Determines if the field can be modified after creation.
  - **Masked**: Hides the field content for security purposes.

  You can also rearrange the sequence of the fields if required after they have been created.

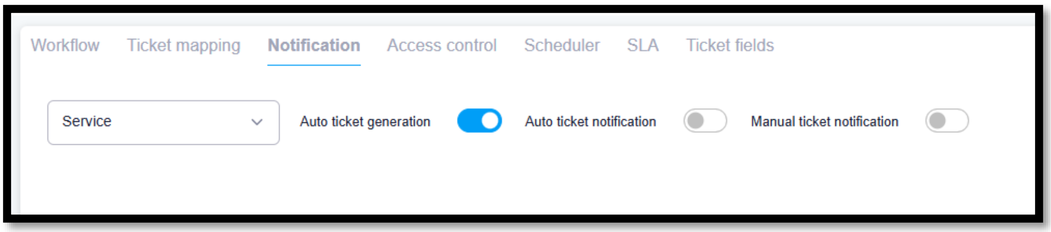
Settings->Ticket->Ticket Fields



- **Notifications:** The "Notification" option includes 3 configurable settings: Auto ticket generation, Auto ticket notification & Manual ticket notification.

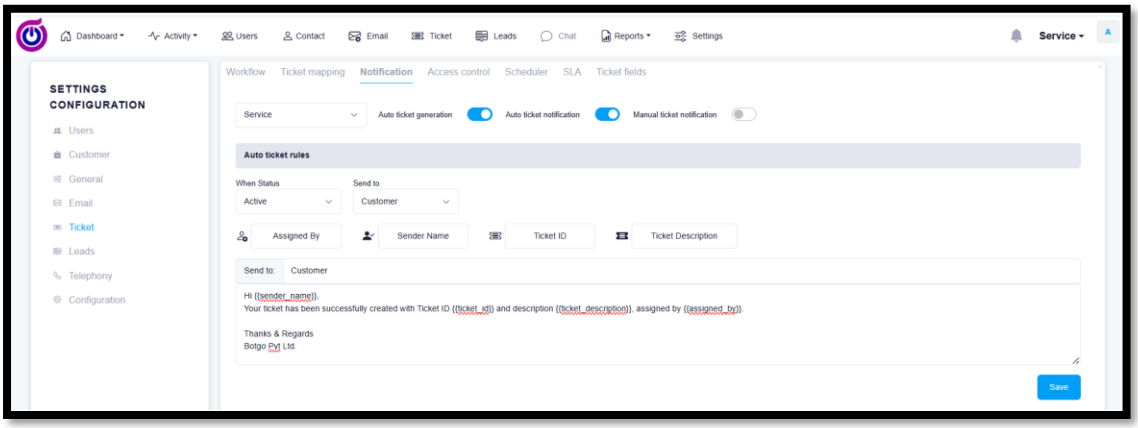
  - **Auto ticket generation**: Auto ticket generation determines whether emails should be automatically converted into tickets. Toggle "On" to activate or “Off” to deactivate.

    Settings->Ticket->Notification->Auto ticket generation



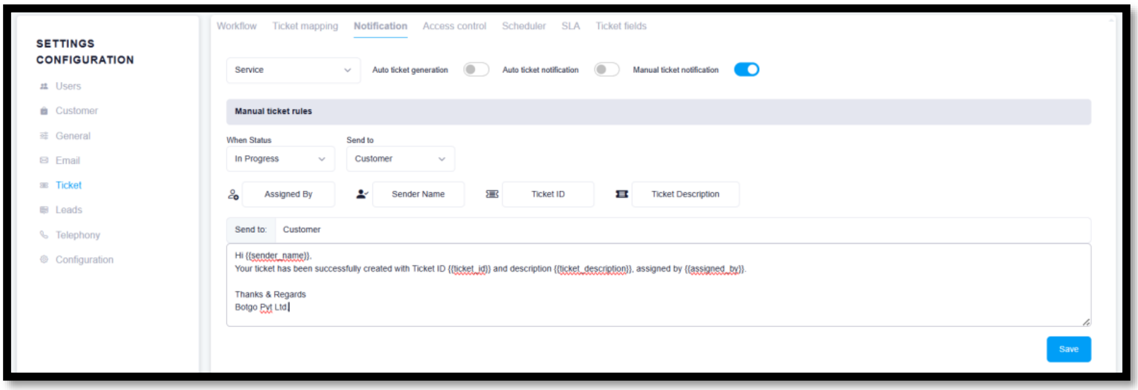
- **Auto ticket notification:** Toggle the button "On" to enable event-based ticket notifications. Choose from **Creator, Customer, or Assignee** to send predefined messages internally or externally. You can also define when notifications are triggered based on ticket statuses like **Active, In Progress, or Closed**.
  While adding content to notifications, you can include:
  - **Assigned By:** Displays who assigned the ticket.
  - **Sender Name:** Shows the name of the sender.
  - **Ticket ID:** Adds the unique ticket identifier.
  - **Ticket Description:** Includes the description added when creating the ticket.

Settings->Ticket->Notification->Auto ticket notification



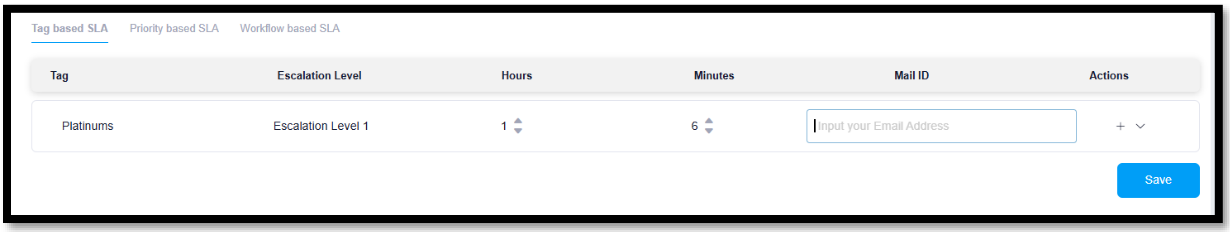
- **Manual Ticket Notification**: Toggle the button "On" to enable event-based ticket notifications. Choose from **Creator, Customer, or Assignee** to send predefined messages internally or externally. You can also define when notifications are triggered based on ticket statuses like **Active, In Progress, or Closed**.
  While adding content to notifications, you can include:
  - **Assigned By:** Displays who assigned the ticket.
  - **Sender Name:** Shows the name of the sender.
  - **Ticket ID:** Adds the unique ticket identifier.
  - **Ticket Description:** Includes the description added when creating the ticket.

Settings->Ticket->Notification->Manual ticket notification



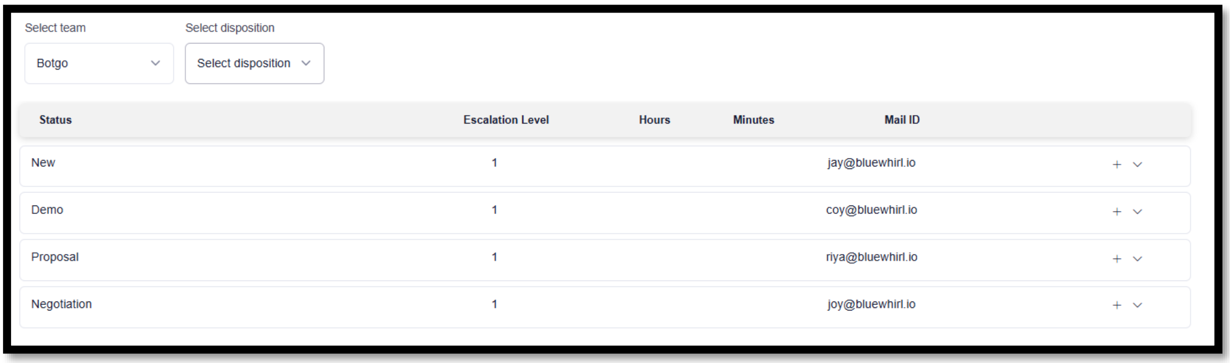
- **SL (Service Level):** SL (Service Level) can set the expected response and resolution time for tickets or issues. Various SL types can be configured in the application, including:
  - SL by Customer Tags
  - SL by Disposition Priority
  - Workflow-Based SL

- **SL by customer tags**: SL by customer will allow you to define the turnaround time for customers based on their assigned tags. You can:
  - Set SL times according to customer tags.
  - Predefine escalation points to notify via email in case of an SL breach.
  - Configure multiple escalation levels for better issue resolution.



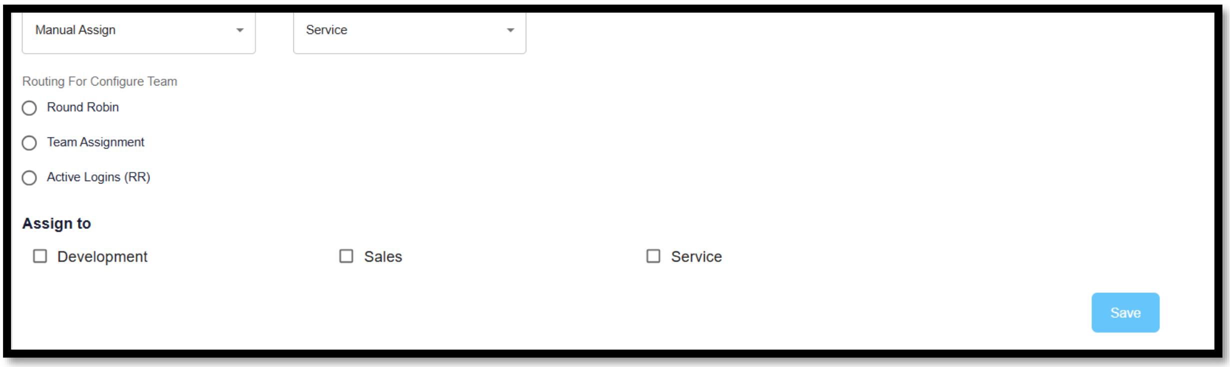
- **SL by disposition priority:** SL by disposition priority allows you to define the turnaround time based on the priority of the disposition. You can:
    - Predefine SL times according to disposition priority.
    - Set escalation points to notify via email in case of an SL breach.

- **Workflow based SL:** It can define the turnaround time for a created workflow. You can:
    - Assign SL to each status configured within the workflow.
    - Set up escalation levels to trigger notifications if the SL is breached.



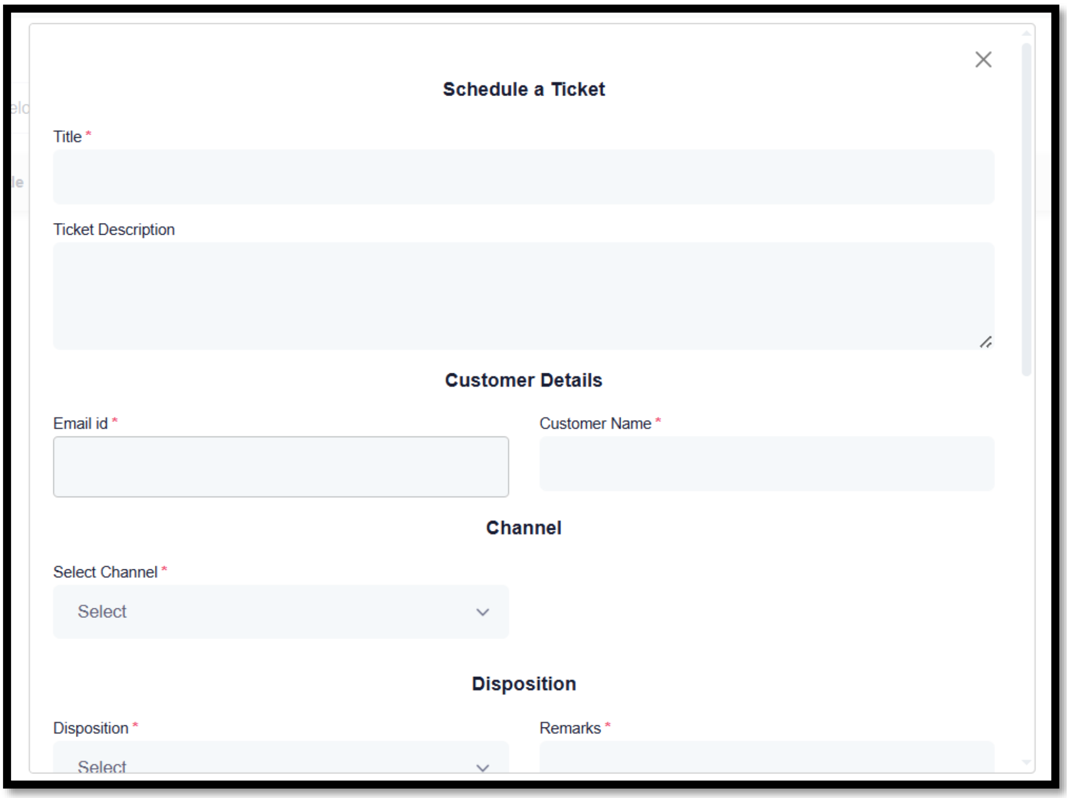
- **Ticket Routing Rules:** In ticket routing rules you can enable and define which teams can assign tickets to others while also setting up routing logic, including round-robin, active logins & team-based assignment.

Settings->Ticket->Ticket Routing Rules

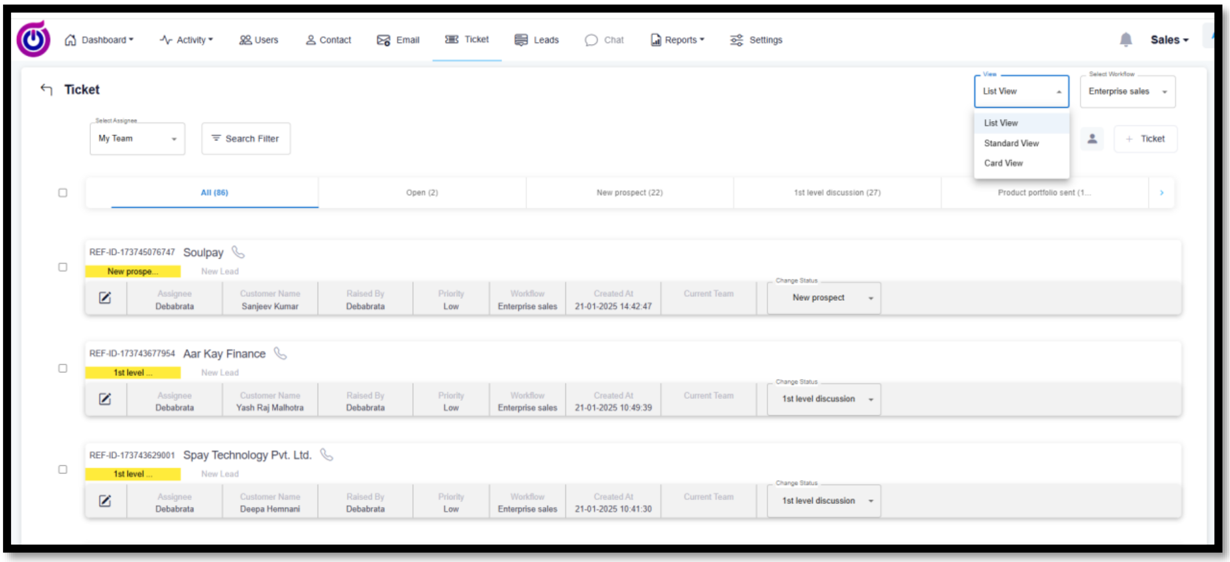


- **Ticket Schedular**: Ticket Scheduling will automate ticket creation by setting predefine details. It will allow to predefine ticket creation with details such as:
  - **Start Date & End Date** - Defines the active period for ticket generation.
  - **Frequency** - Specifies how often the ticket should be created (e.g., daily, weekly, monthly).
  - **Time for Ticket Creation** - Sets the exact time when the ticket should be generated.

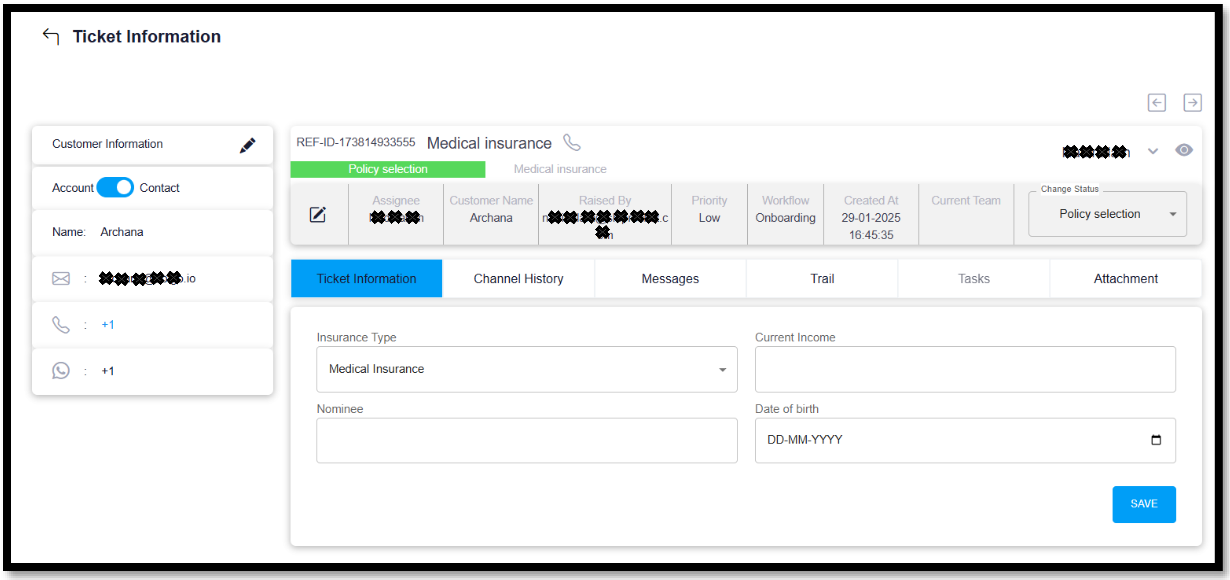
Settings->Ticket->Ticket Schedular



Ticket Module: After configuring the ticket module, you can create tickets here, and all the configured settings will be visible in this panel. The multiple views include. Standard View, List View, and Card View.



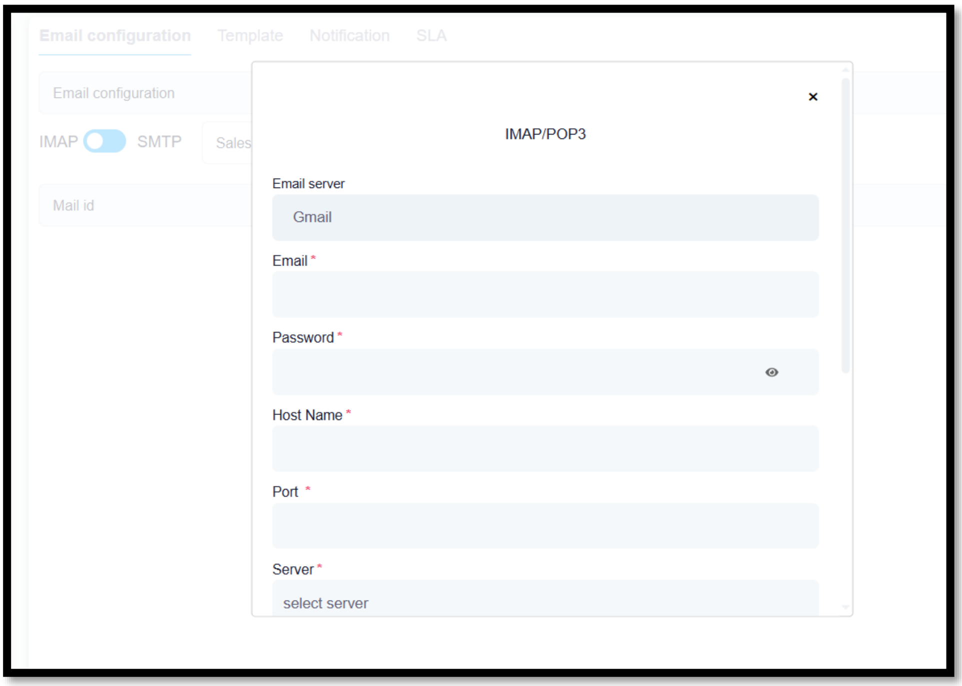
- **Ticket work panel:** This panel will allow users to manage tickets using the configured workflow. Users can update stages, ticket details, and channel history, add internal/external notes, view the audit trail, create tasks, and upload/view attachments if any.



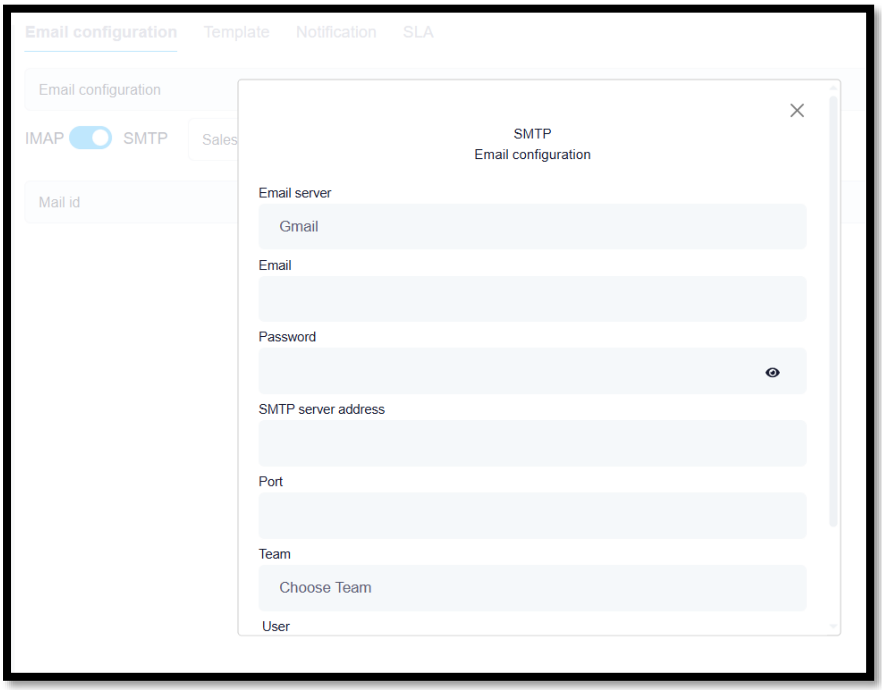
Email: The "Email" option includes four configurable settings: Email configurations. Template, Notifications, and SL.

- **Email Configuration:** You can configure your official email ID for sending and receiving mails in the platform via Gmail or Microsoft 365 by providing the required details.

Setting->Email->Email configurations->IMAP/POP3

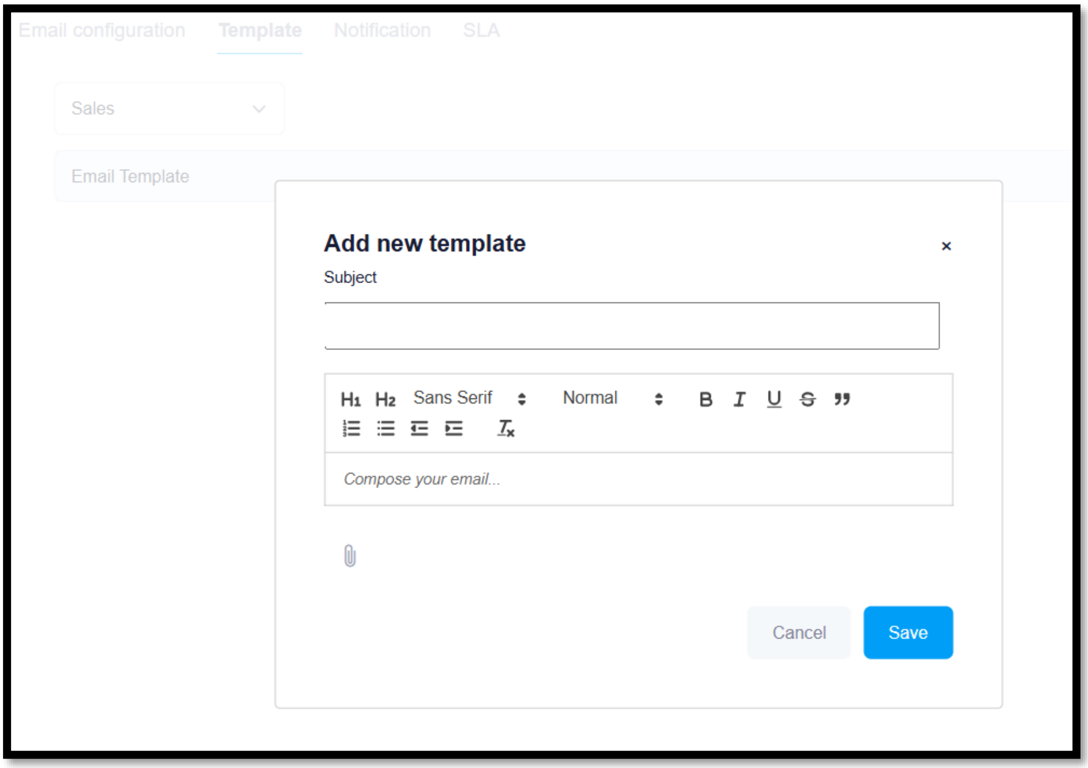


Setting->Email->Email configurations->SMTP



- **Template:** This is where you can predefine email templates to streamline repetitive emails and enhance agent productivity.

Settings->Email-> Template



- **Notifications:** The "Notification" option includes 2 configurable settings: Auto Response and Email Notifications.

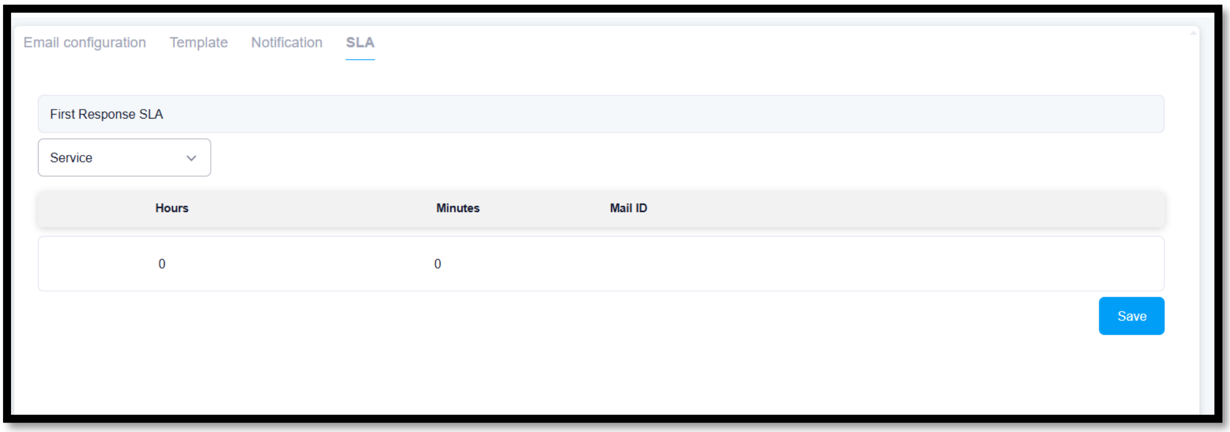
- **Auto Response:** Auto-response feature will automatically send predefined replies to incoming emails or tickets. It will help acknowledge customer queries instantly, provide essential information, and set expectations for response times.

Settings->Email ->Notification->Auto response.

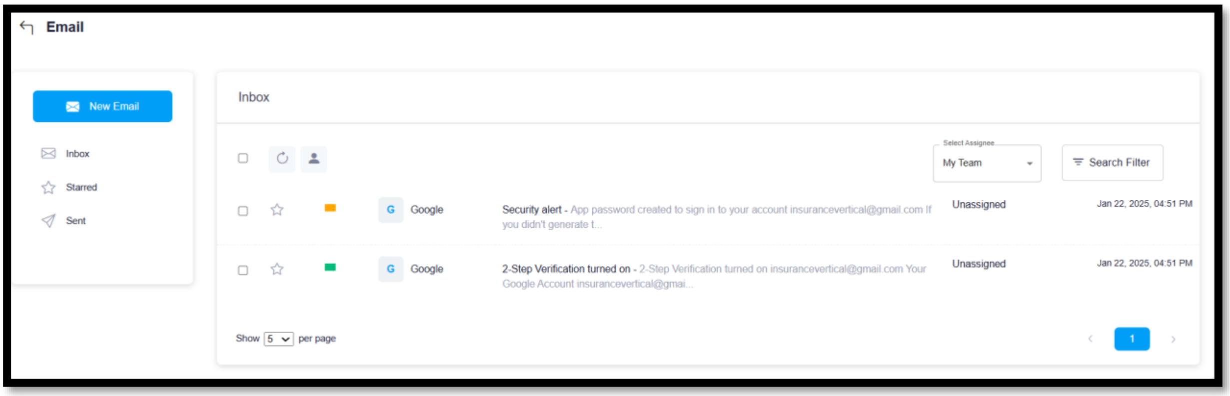
- **Email Notification:** You can set up event-based email notifications to notify the team or customers with predefined content.

Settings->Email->Notification

- **SL:** First Response SL can set the maximum time within which an agent/user must respond to a customer query. You can
  - Set up escalation levels to trigger notifications if the SL is breached.



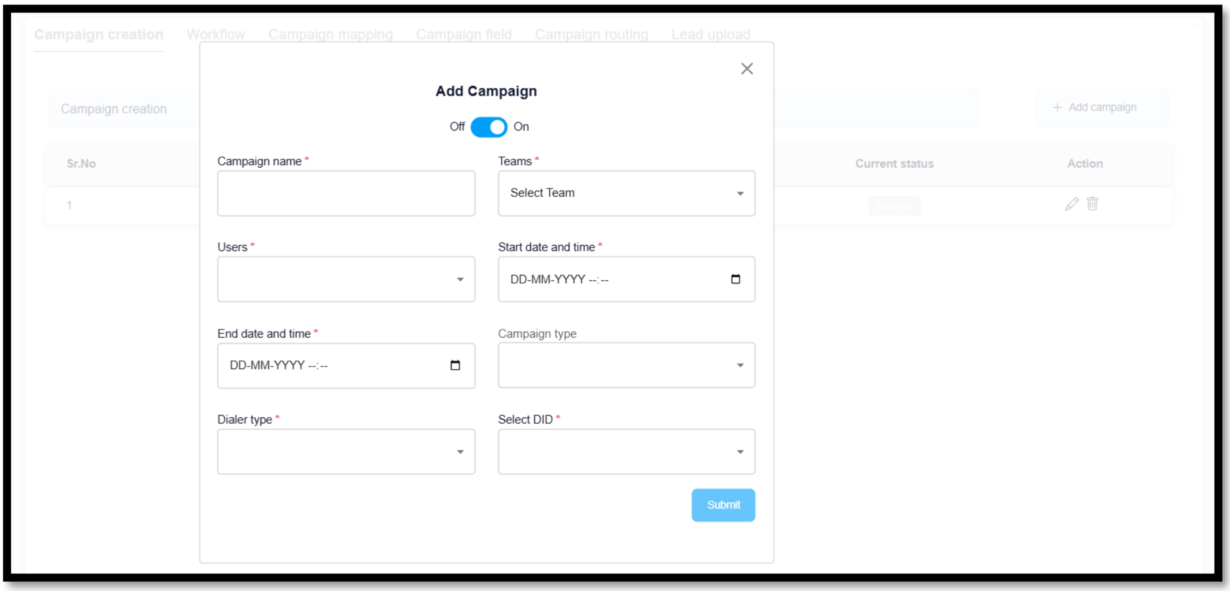
Email Module: This is where you view the email inbox where you can add assignees, set workflows against respective emails, convert emails into tickets, and reply with workflow-mapped with trail details.



- **Leads:** Leads are potential customers who have shown interest in your product or service. This section will allow you to manage leads for collections, retentions, and other services by creating targeted campaigns, enabling effective tracking, engagement, and conversion.
  The "Leads" option includes 6 configurable settings Campaign creation, Workflow, Campaign mapping, Campaign field, Campaign routing and Lead upload.

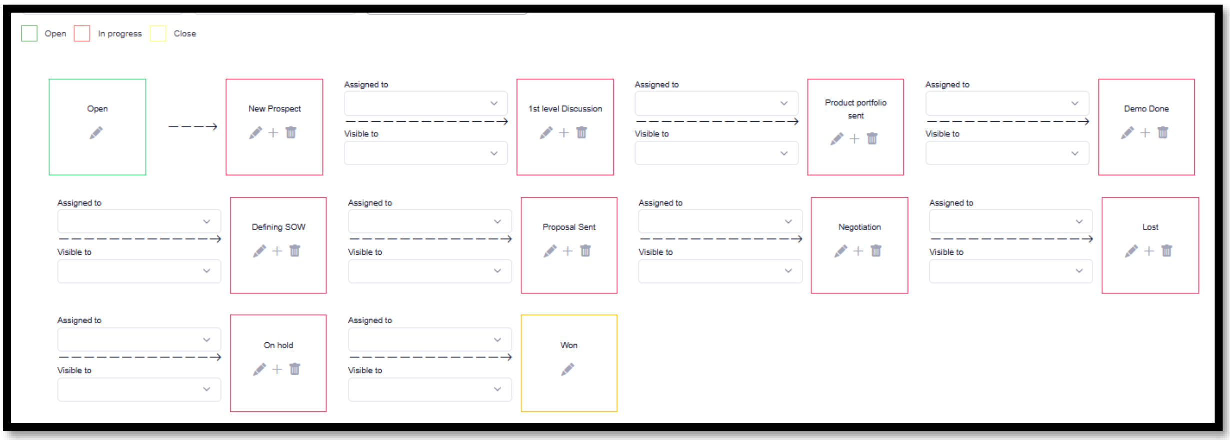
- **Campaign creation:** You can create multiple campaigns and assign teams & users to manage them efficiently.

Settings->Leads->Campaign creation



- **Workflow:** Each campaign can have a defined workflow for users to follow, which can be added here.
  Statuses include Active, In Progress, and Closed, with customizable labels and the option to define multiple 'In Progress' states.
  Multiple workflows can be added based on teams

Settings-Leads->Workflow.



You can add, edit, and delete any information as needed. However, once a workflow is created and tickets are assigned to it, deleting the workflow is not recommended, as it may result in data loss for those leads.

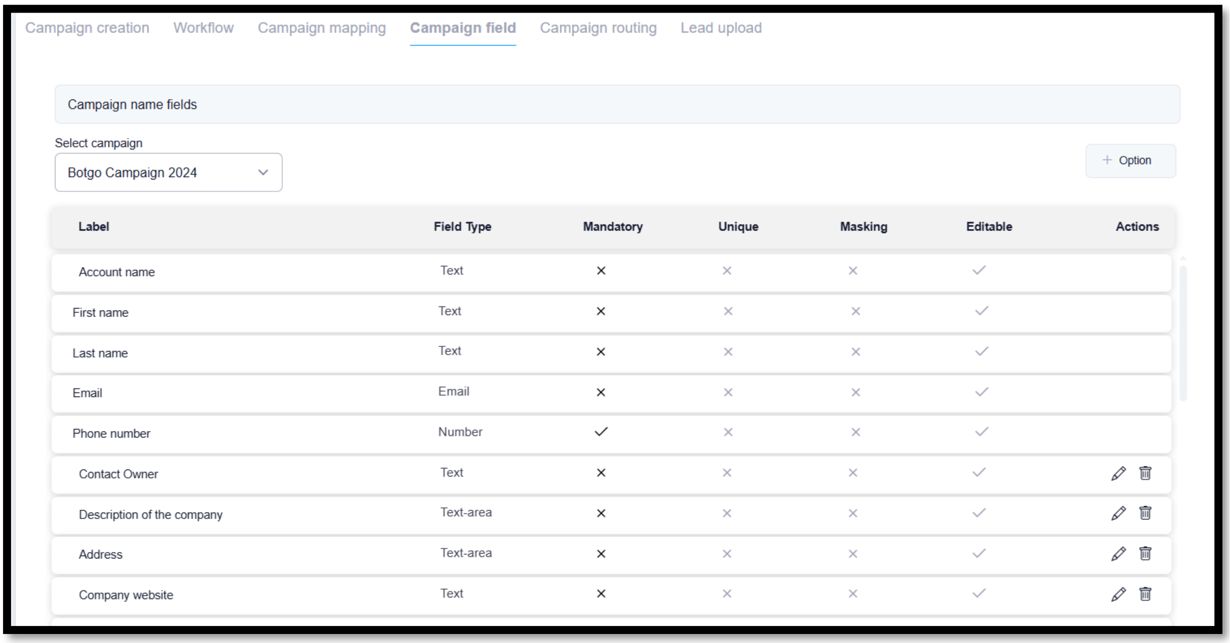
- **Campaign Mapping**: Map the campaign to the workflow in this panel

  Settings->Leads->Campaign Mapping

- **Campaign Fields:** These represent the input fields for lead details. You can create labels and define the field types required when adding new leads. You can also define additional properties for each field, such as:
  - **Mandatory**: Requires the field to be filled in.
  - **Unique**: Ensures the field value is not duplicated.
  - **Editable**: Determines if the field can be modified after creation.
  - **Masked**: Hides the field content for security purposes.

  You can also rearrange the sequence of the fields after they have been created.

Setting->Lead->Campaign Fields

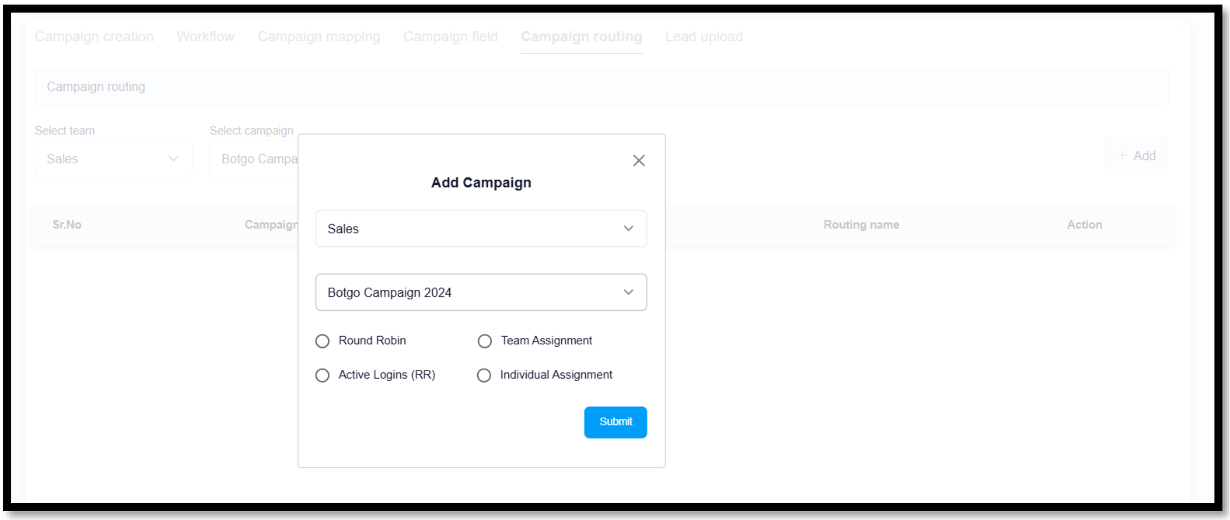


Label	Field Type	Mandatory	Unique	Masking	Editable	Actions
Account name	Text	×	×	×	✓	
First name	Text	×	×	×	✓	
Last name	Text	×	×	×	✓	
Email	Email	×	×	×	✓	
Phone number	Number	✓	×	×	✓	
Contact Owner	Text	×	×	×	✓	
Description of the company	Text-area	×	×	×	✓	
Address	Text-area	×	×	×	✓	
Company website	Text	×	×	×	✓	

- **Campaign Routing:** Campaign routing will automatically assign incoming leads to specific users based on predefined criteria, enabling seamless lead distribution. Routing logic includes
  - Round Robin,
  - Team Assignments,
  - Active Logins (RR)
  - Individual Assignment

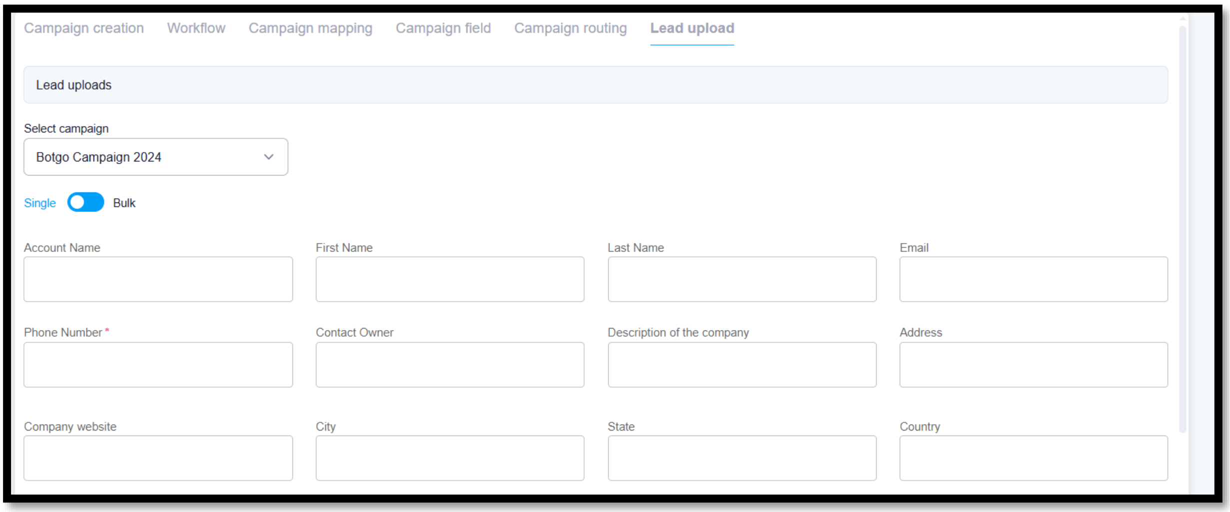
- **Individual Assignment -** Will directly allocate leads/customers to a specific user, ensuring responsibility.
- **Round Robin -** Will distribute leads/customers sequentially among team members in a rotating order.
- **Active Logins (RR) -** Similar to round robin but assigns only to logged-in users.
- **Team Assignment -** Assigns cases to a team, allowing any member to take ownership.

Settings->Leads->Campaign Routing

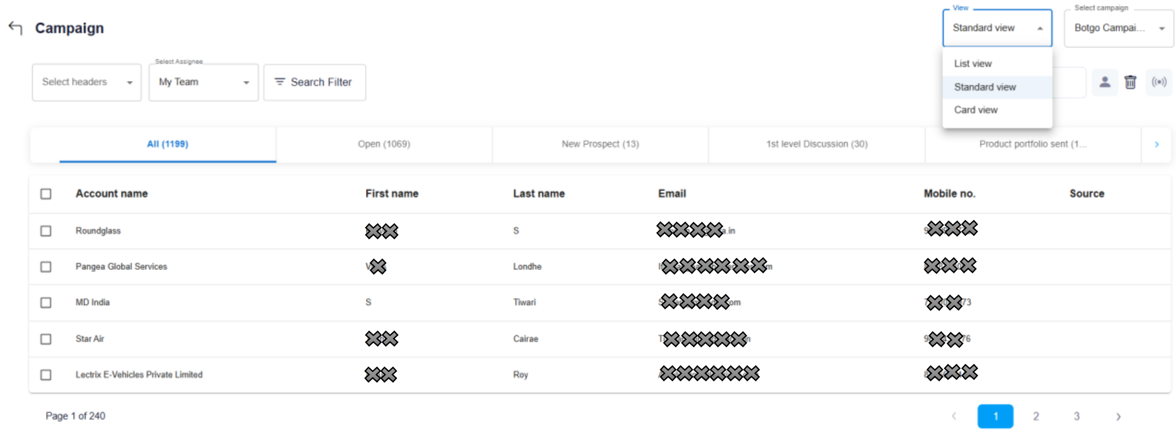


- **Lead Upload:** Leads or customers can be uploaded in bulk or added single under specific campaigns. Once uploaded, the system can assign them based on predefined routing logic, ensuring efficient distribution.

Settings->Leads->Lead upload



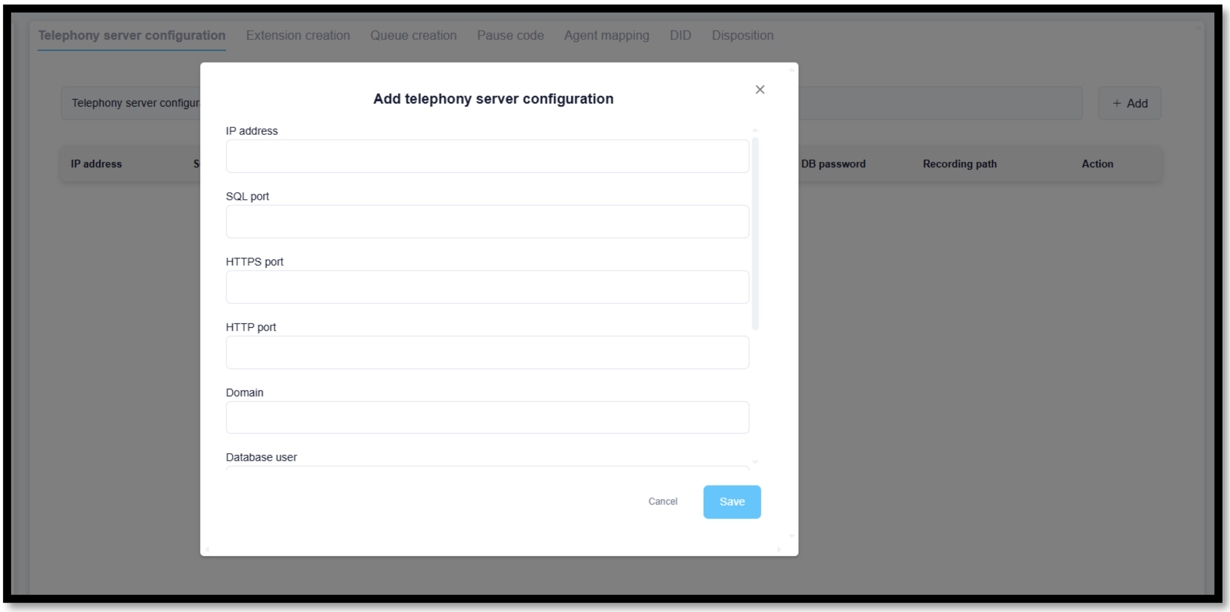
Leads: After configuring the lead module, you can create leads here, and all the configured settings will be visible in this panel. The multiple views include. Standard View, List View, and Card View.



- **Telephony:** It will enable inbound & outbound calling within the platform, allowing agents to make, receive, and track calls. It will support features like call logging, recording and click-to-call, enhancing communication, customer engagement, and productivity.
  The "Telephony" option includes seven configurable settings Telephony server configuration, Extension creation, Queue creation, Pause code, Agent mapping, DID and Disposition.

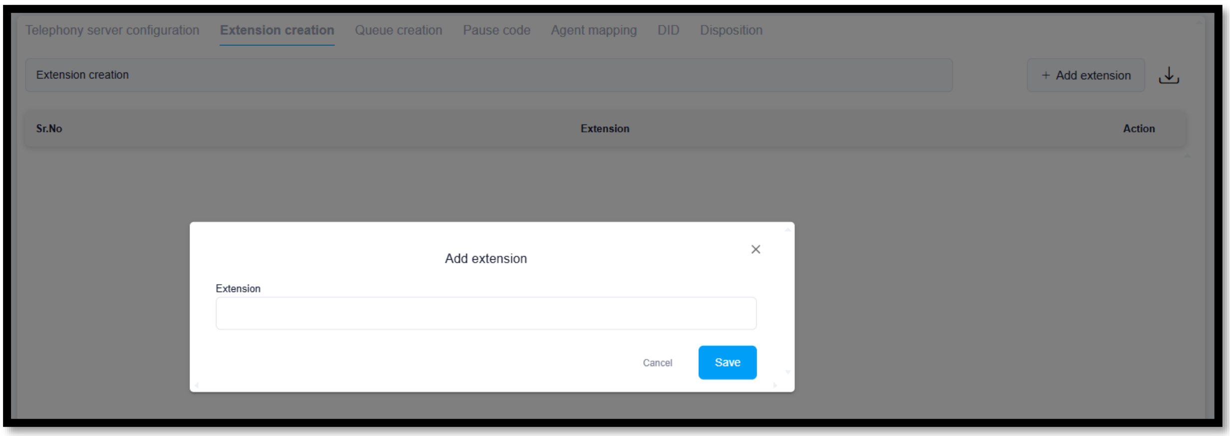
- **Telephony server configurations:** This will integrate calling features within the application. It will involve setting up SIP/VoIP settings and multiple such information.

  Settings->Telephony-> Telephony server configurations



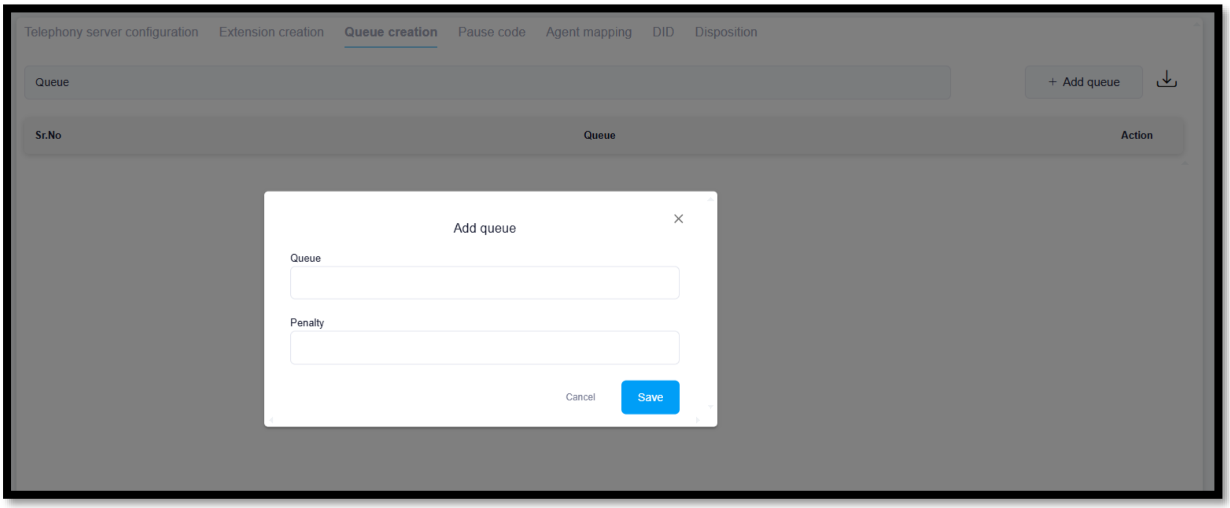
- **Extension creation**: You can create extension in this panel which will allow users to set up unique internal numbers for agents within the telephony system. This will enable seamless call transfers, direct dialling, and efficient internal communication within the CRM.

Settings->Telephony->Extension creation



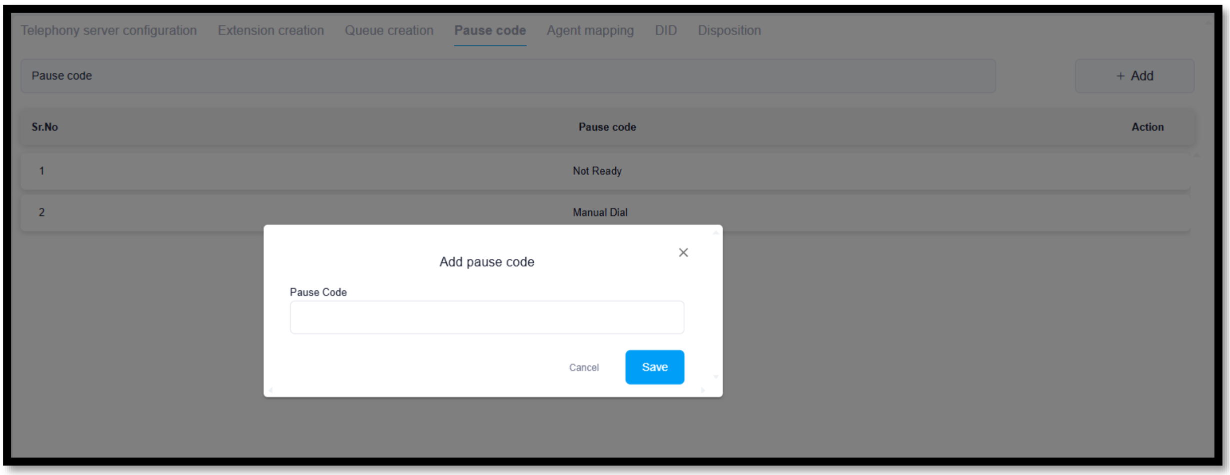
- **Queue creation:** Queue creation allows you to add queue names for the IVR setup based on business requirements. It helps manage incoming calls efficiently by directing them to the appropriate agents or teams

Settings->Telephony->Queue Creation



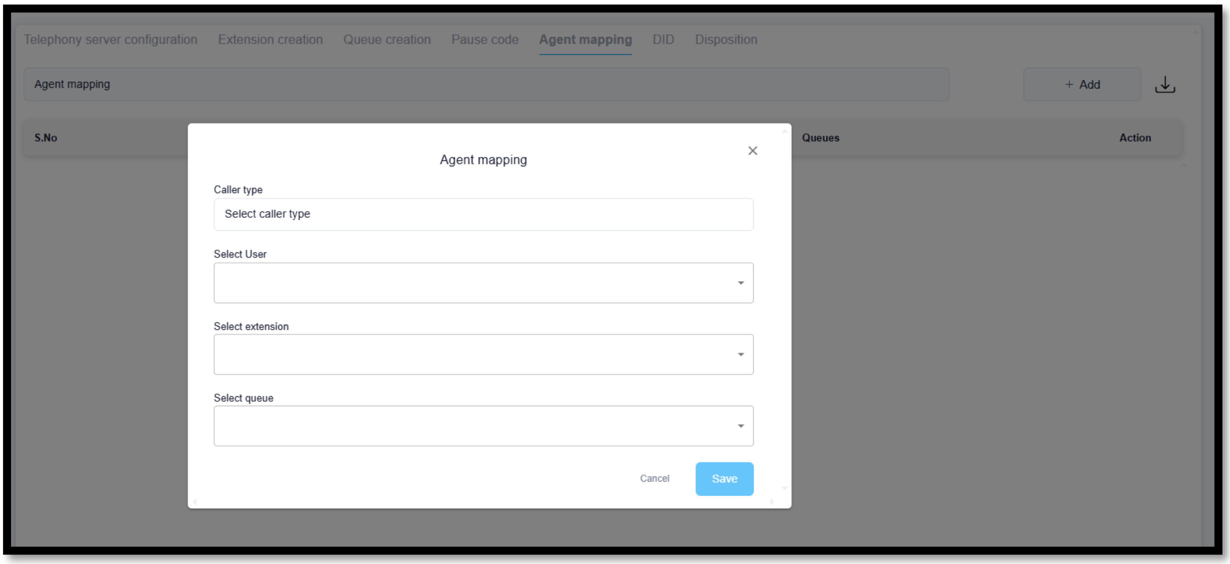
- **Pause code: A pause code is used to track the reasons why an agent/user is temporarily unavailable to take calls. It will help monitor agents/users' productivity and categorize non-working time, such as breaks, meetings, or training sessions. Default pause codes are "Not Ready" and "Manual Dial".**

Settings->Telephony->Pause Code



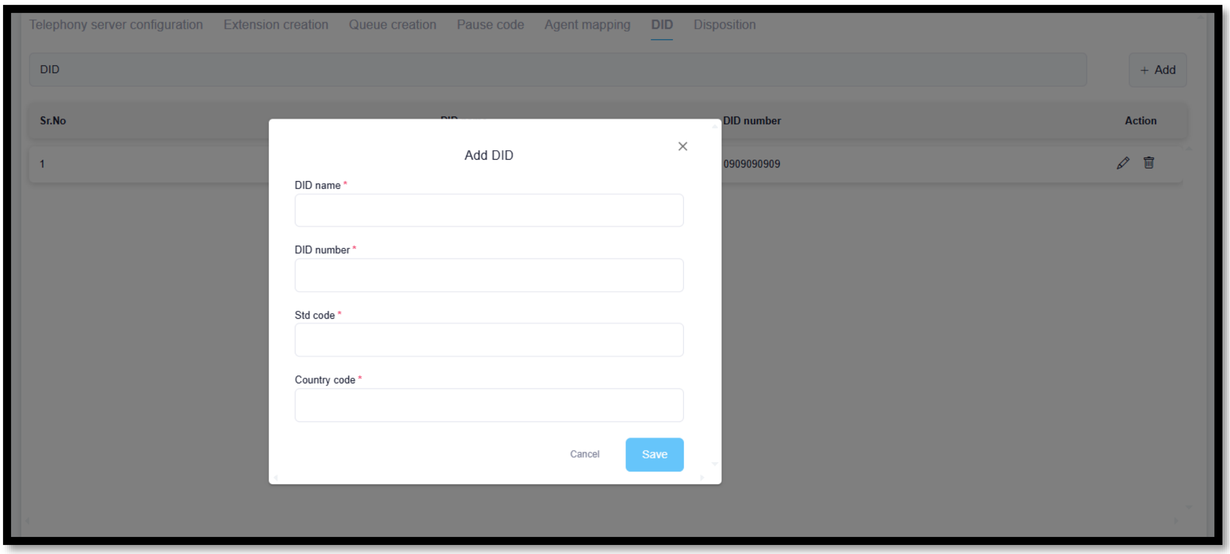
- **Agent Mapping:** Agent mapping links extensions to agents and assigns agents to specific queues. This ensures proper call routing and efficient handling of incoming calls.

Settings->Telephony->Pause Code



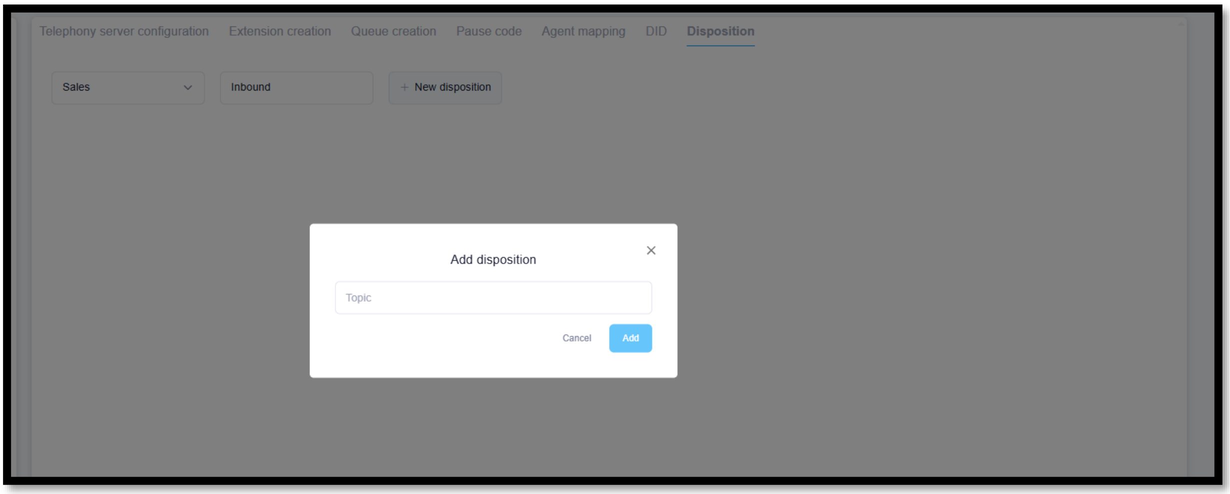
- **DID (Direct Inward Dialling):** Add DID numbers here for outbound and inbound calls. Agents can select the desired number before dialling, and inbound call numbers should be added in this panel for proper routing.

Settings->Telephony->DID



- **Disposition:** Disposition will help categorize interactions and can be defined as a multi-level dropdown.
    - Team-wise Dispositions: Different teams can have their own specific dispositions.
    - Process-wise Dispositions: Inbound and Outbound can have their own specific dispositions.
    - Edit & Delete: Dispositions can be modified or removed if needed. (Deleting a Disposition is not recommended, as it will also remove any associated data linked to that disposition.

Settings->Telephony->Dispositions



Dashboards & Reports: Each module—Email, Ticket, Telephony, and Lead—has dedicated dashboards and reports for tracking performance, insights, and analytics