

CRM One360 User Manual

A step-by-step guide to every screen of the program

Version 0.1.2 · October 2026

CRM One3600.1.2

EmailCRMSettingsSystemHelp

Dashboard

Customers

Leads

Opportunities

Pipeline

Tickets

Tasks

Customer 360*

⚠ DEMO COMPANY: the data are only examples. To work with your real data, switch to your company in System -> Companies.

CRM > Pipeline

Pipeline (Kanban)

Reload

Drag an opportunity from one column to another to change its stage. The final columns only show closings from the last 90 days (the full history is in the list view).

Qualification 5 opportunities £176,500	Contacted 5 opportunities £98,400	Proposal 6 opportunities £137,650	Negotiation 6 opportunities £171,400	Won 7 opportunities £185,350	Lost 4 opportunities £111,950
Extended warranty Summit Logistics Ltd £44,300 Administrator10%	Website redesign Oakridge Construction plc £40,550 Administrator25%	Marketing campaign Harbour View Hotel £25,550 Administrator50%	Cloud migration BioMed Laboratories Inc £14,300 Administrator75%	Consulting retainer Riverside Estates £15,800 Administrator100%	New branch rollout Brightside Dental Clinic £42,800 Administrator0%
Cloud migration Tones & Visual Solutions £42,800 Administrator10%	Consulting retainer Pixel Perfect IT Solutions £15,850 Administrator25%	Software licence renewal Compass Digital Agency £3,800 Administrator50%	Consulting retainer Summit Logistics Ltd £24,800 Administrator75%	Annual maintenance contract Highland Distillery Co £23,300 Administrator100%	Hardware upgrade Highland Distillery Co £6,850 Administrator0%
Consulting retainer Trustline Insurance Brokers £18,550 Administrator10%	Annual maintenance contract ClearSight Opticians £42,800 Administrator25%	Software licence renewal Granite Stoneworks £3,800 Administrator50%	New branch rollout Clear Road Driving School £6,850 Administrator75%	Customer portal Highland Distillery Co £22,550 Administrator100%	Customer portal Crown Pharmacy £33,950 Administrator0%
Annual maintenance contract Evergreen Landscaping £41,300 Administrator10%		Staff training programme Peak Performance Physio £2,300 Administrator50%	Marketing campaign Clear Road Driving School £28,550 Administrator75%	Staff training programme BioMed Laboratories Inc £4,550 Administrator100%	Hardware upgrade Oakridge Construction plc £38,850 Administrator0%
Hardware upgrade Northwind Traders Ltd £37,550 Administrator10%		Customer portal Northwind Traders Ltd £18,800 Administrator50%	Data clean-up project Clear Road Driving School £38,850 Administrator75%	Customer portal Summit Logistics Ltd £27,850 Administrator100%	
		Software licence renewal	Cloud migration	Annual maintenance contract	

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1

Getting started

How to sign in to CRM One360, how the window is organised and how the lists work. Everything in this chapter applies to the rest of the program.

In this chapter

- What CRM One360 is and what the DEMO company is
- Signing in
- The main window
- Working with lists
- Language and password
- Switching company

Welcome to CRM One360

CRM One360 is a CRM with built-in email for small and medium-sized companies. Customers, leads, opportunities, support tickets, tasks and every email you exchange with them are kept together in one program.

Everything in one place

The bar at the top has five modules: Email, CRM, Settings, System and Help. Each module has its own screens, shown as large icons under the bar.

The DEMO company

When the program is installed it creates a demonstration company full of sample data: customers, leads, opportunities, tickets, tasks and emails. Use it to practise without fear. Every picture in this manual comes from the DEMO company.

Your company

The installation wizard also creates your own, empty company. To work with it, switch company in System → Companies (explained at the end of this chapter). While you are in the DEMO company a red band reminds you on every screen.

Email linked to the CRM

Every email from or to a customer, lead or contact is linked to its record automatically. You can see the whole conversation history from the Customer 360° view.

Claude, your AI assistant

With Claude Desktop installed you can ask questions about your CRM in plain language. An administrator decides what Claude is allowed to do (chapter 7).

Signing in

Where: **when you open CRM One360**

The image shows the CRM One360 login interface. At the top, the text "CRM One360" is displayed in large, bold letters, with "v0.1.2" in the top right corner. Below this is a white login form on a blue background. The form contains three input fields: "Company" (with a dropdown menu showing "Demo company DEMO"), "User" (with a dropdown menu showing "admin Administrator"), and "Password" (with a placeholder "Enter your password"). Below the password field is a link "Forgot your password?". At the bottom of the form are two buttons: "Cancel" and "Sign in". Five numbered orange circles are overlaid on the form to indicate the steps: 1. Company dropdown, 2. User dropdown, 3. Password field, 4. Sign in button, and 5. Forgot your password? link. At the bottom of the screen, the text "CRM One360" is on the left and "CRM with built-in email" is on the right.

What it is for

It is the way in. Each person signs in with their own user, and the program remembers the last company they worked with.

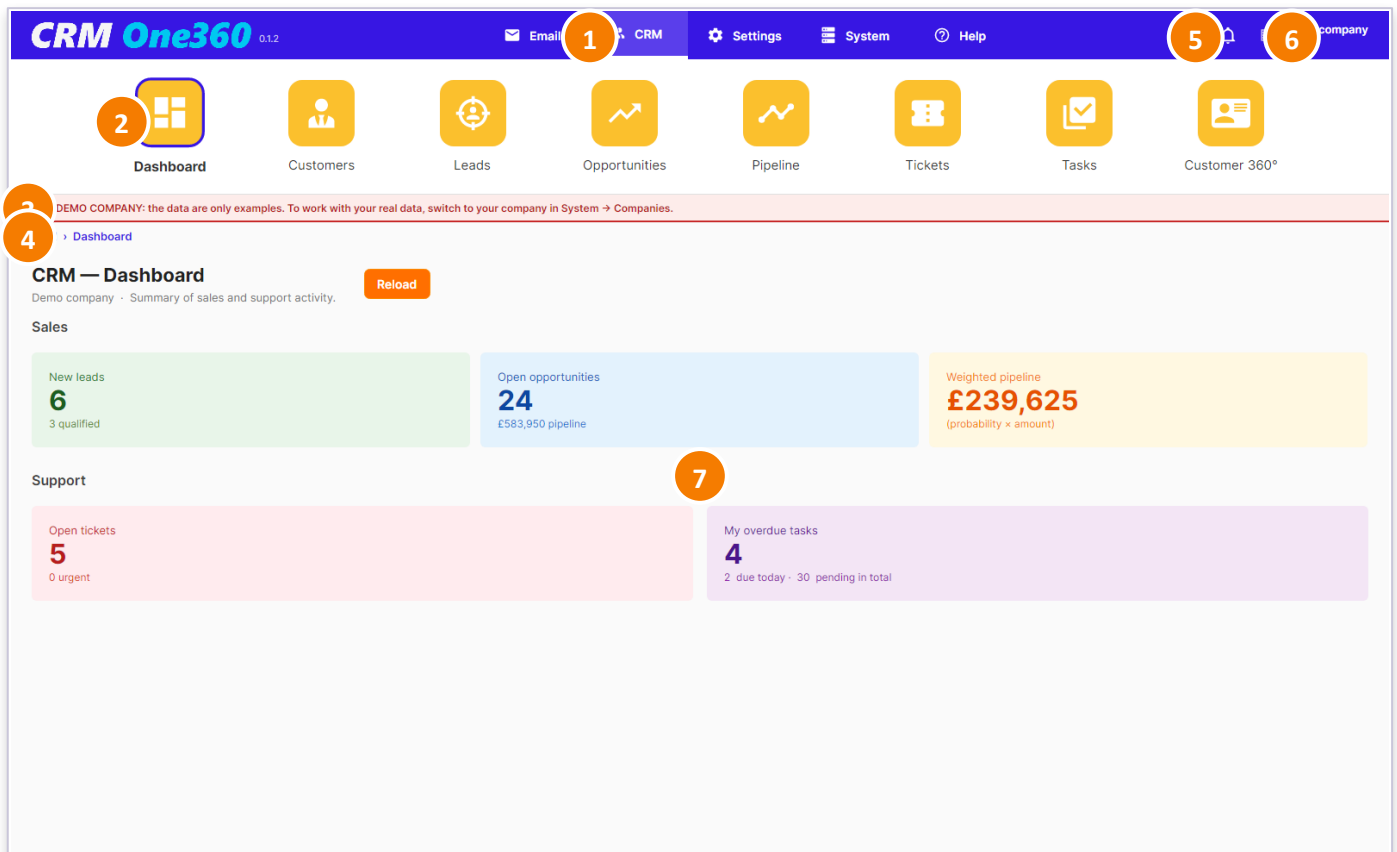
How to use it

- 1 Check the company. If you have several, choose the one you are going to work with.
- 2 Choose your user.
- 3 Type your password.
- 4 Press «Sign in» (or the Enter key).
- 5 If you cannot remember your password, press «Forgot your password?» and follow the instructions.

Tip: Right after installation the program signs in by itself with the user created in the wizard.

The main window

Where: **it appears after signing in**



What it is for

Every screen is reached from here: choose the module at the top, the screen underneath and work in the centre.

How to use it

- 1 Module bar: Email, CRM, Settings, System and Help.
- 2 Screens of the chosen module. Click an icon to open the screen; the one you are on has a coloured frame and bold text.
- 3 Red DEMO band: a reminder that you are in the demonstration company.
- 4 Path: the module and the screen you are on.
- 5 Bell: notices for you: task reminders, customers assigned to you, customer emails with no reply, emails that could not be sent...
- 6 The company you are working in. Check it before entering data.
- 7 Work area: the list or form of the screen.

Working with lists

Where: **any list**, for example CRM → Customers

CRM One360 0.1.2

Email CRM Settings System Help

Dashboard Customers Leads Opportunities Pipeline Tickets Tasks Customer 360°

⚠ DEMO COMPANY: the data are only examples. To work with your real data, switch to your company in System → Companies.

CRM > Customers

Customers

32 customer(s) in 'Demo company'.

Code	Tax ID	Company name	Email	Active
C028	30-7731943	AquaFlow Plumbing	info@aquaflo.example	☒
C029	43-8823619	BioMed Laboratories Inc	info@biomed-labs.example	☒
C007	GB511761594	Bluebell Language Sch	info@bluebell-languages.example	☒
C002	GB238910798	Brightside Dental Clinic	info@brightside-dental.example	☒
C031		Clear Road Driving School	hello@clearroaddrivingschool.example	☒
C014	GB537374938	ClearSight Opticians	info@clearsight.example	☒
C032		Compass Digital Agency	hello@compassdigitalagency.example	☒
C009	GB275346082	Crown Pharmacy	info@crownpharmacy.example	☒
C023	GB424662917	Family Fresh Supermarkets	info@familyfresh.example	☒
C018	IE1146768A	Galway Bay Seafood	info@galwaybay.example	☒
C005	GB957561605	Greenleaf Organic Bakery	info@greenleaf.example	☒
C003	GB589345268	Harbour View Hotel	info@harbourview.example	☒
C024	GB596123787	Harmony Beauty Spa	info@harmonyspa.example	☒
C011	GB664922939	Highland Distillery Co	info@highland-distillery.example	☒
C013	GB476342648	IronCore Fitness	info@ironcore.example	☒
C012	GB454512096	Linear Architects	info@linear-architects.e	☒

New Edit Reload

What it is for

All lists work the same way: they show the records of the company and you open them from the buttons.

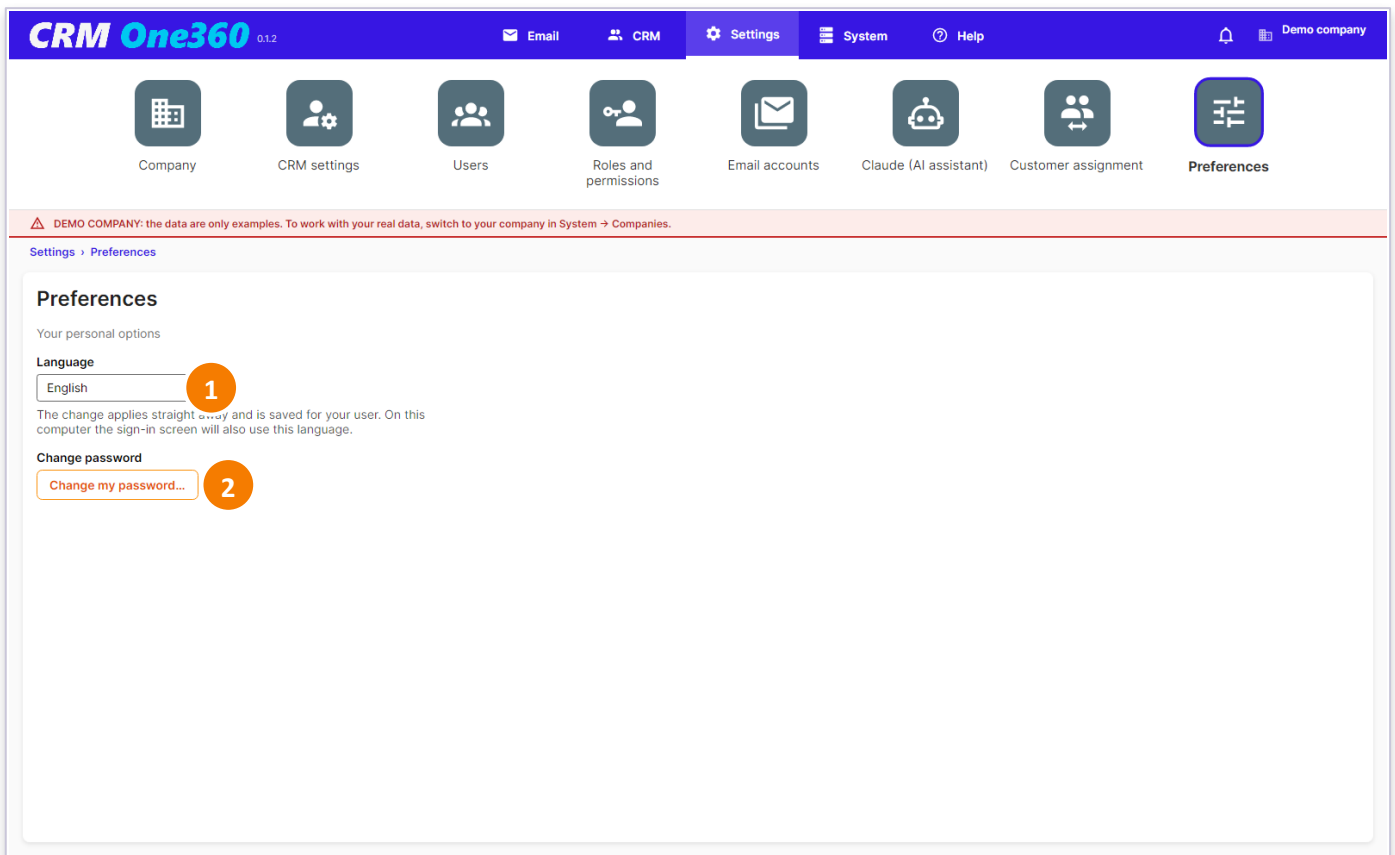
How to use it

- 1 Click a column header to sort by that column; click again to reverse the order.
- 2 Click a row to select it. Double-click it to open it.
- 3 «New» creates a record.
- 4 «Edit» opens the selected record.
- 5 «Reload» reads the list again (useful when other people are working at the same time).

Tip: You can make a column wider by dragging the edge of its header.

Language and password

Where: **Settings** → **Preferences**



What it is for

Your personal options. They only affect your user.

How to use it

- 1 Language: English or Spanish. The change applies straight away and the sign-in screen of this computer uses it too.
- 2 Change my password: type the current password and the new one twice.

Tip: The first time, the program uses the language of Windows: Spanish if Windows is in Spanish, English otherwise.

Switching company

Where: **System** → **Companies**

CRM One360 0.1.2

Email CRM Settings System Help

Companies Import and export with Excel Data protection (GDPR) Access from other computers Backup Switch to multi-user

DEMO COMPANY: the data are only examples. To work with your real data, switch to your company in System → Companies.

System → Companies

Companies

Company list (each new company gets its own database). Choose a row and press 'Work in this company' to switch company.

Name	Tax ID	Database	Active
Demo company		CRMOne360_DEMO	☒
EMP001PRUE Pruebas		CRMOne360_EMP001PRUE	☒

Work in this company New Edit Backup Reload

What it is for

Each company has its own data. Here you choose which one you are working in, and administrators create new companies.

How to use it

- 1 Select the company in the list.
- 2 Press «Work in this company». The program asks for your password in that company and reopens with its data.
- 3 Administrators can create a new company with «New»: it gets its own, empty database.

Caution: Everything you do in the DEMO company stays there. Before entering real data, switch to your company and check that the red band has gone.

2

Customers and leads

The people and companies you work with. Leads are prospects that are not customers yet; when they buy, you convert them into customers. The Customer 360° view shows everything about a customer on one screen.

In this chapter

- The customer list, the customer record and its contacts
- Leads, their contacts and activities
- Converting a lead into a customer
- The Customer 360° view

Customers

Where: CRM → Customers

CRM One360 0.1.2

Email CRM Settings System Help

Dashboard Customers Leads Opportunities Pipeline Tickets Tasks Customer 360°

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CRM → Customers

Customers

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Code	Tax ID	Company name	Email	Active
C028	30-7731943	AquaFlow Plumbing	info@aquaflow.example	☒
C029	43-8823619	BioMed Laboratories Inc	info@biomed-labs.example	☒
C007	GB511761594	Bluebell Language School	info@bluebell-languages.example	☒
C002	GB238910798	Brightside Dental Clinic	info@brightside-dental.example	☒
C031		Clear Road Driving School	hello@clearroaddrivingschool.example	☒
C014	GB537374938	ClearSight Opticians	info@clearsight.example	☒
C032		Compass Digital Agency	hello@compassdigitalagency.example	☒
C009	GB275346082	Crown Pharmacy	info@crownpharmacy.example	☒
C023	GB424662917	Family Fresh Supermarkets	info@familyfresh.example	☒
C018	IE1146768A	Galway Bay Seafood	info@galwaybay.example	☒
C005	GB957561605	Greenleaf Organic Bakery	info@greenleaf.example	☒
C003	GB589345268	Harbour View Hotel	info@harbourview.example	☒
C024	GB596123787	Harmony Beauty Spa	info@harmonyspa.example	☒
C011	GB664922939	Highland Distillery Co	info@highland-distillery.example	☒
C013	GB476342648	IronCore Fitness	info@ironcore.example	☒
C012	GB454512096	Linear Architects	info@linear-architects.e	☒

New Edit Reload

What it is for

The list of your customers. Users who do not have the «See all customers» permission only see the customers assigned to them (Settings → Customer assignment).

How to use it

- 1 Customer code, tax ID and company name. Every customer gets a code automatically.
- 2 Main email address. Emails from this address and from the customer's contacts are linked to the customer automatically.
- 3 Active: inactive customers are kept with all their history but no longer appear in the drop-down lists.
- 4 «New» opens an empty customer record.
- 5 «Edit» opens the selected customer (or double-click the row).

The customer record

Where: CRM → Customers → New or Edit

Edit customer — Harbour View Hotel

Details Contacts

1 Code C003

2 Company name Harbour View Hotel

Trade name Harbour View Hotel

Customer type Company

3 Tax ID GB589345268

Address 8 Marine Parade

Postal code BN1 2FG

City Brighton

State / Province East Sussex

4 Country GB — United Kingdom

5 Email info@harbourview.example

Phone +44 20 1784 9740

Website https://www.harbourview.example

Sector Hospitality

6 Tags Separated by commas

Notes Demo customer of the DEMO company.

7 ☒ Active customer

Cancel Save

What it is for

The details of a customer company or person.

What is on the screen

- 1 Code: given automatically, following your numbering (C003 is followed by C004). You can change it.
- 2 Company name and trade name.
- 3 Customer type (company or individual) and tax ID or VAT number. The tax ID is optional; if the country is Spain, it is checked.
- 4 Address and country.
- 5 Email, phone and website.
- 6 Sector and tags: free words to group customers (for example «key account»). They are used as filters in Customer assignment.
- 7 Untick «Active customer» to retire a customer without losing its history.

Tip: The window has two tabs: Details, shown here, and Contacts, with the people of the customer (next page).

The customer's contacts

Where: CRM → Customers → Edit → Contacts tab

Edit customer — Harbour View Hotel

Contacts

Each contact is saved straight away with its own "Save" button, separately from the customer data.

New contact Edit Delete

First name	Last name	Email	Mobile	Main
Sean	Walsh	sean.walsh@harbourview.example	+44 7897 199283	☒
Jack	O'Brien	jack.obrien@harbourview.example		☐
Ryan	Davies	ryan.davies@harbourview.example		☐

Cancel Save

The contacts of the customer.

Edit customer — Harbour View Hotel

Details Contacts

Each contact is saved straight away with its own "Save" button, separately from the customer data.

Contact

First name *

Sean

Last name

Walsh

Job title

Managing Director

Department

Email

sean.walsh@harbourview.example

Mobile

+44 7897 199283

Landline

+44 20 3147 8741

☒ Main contact

Notes

Save

Cancel Save

Editing a contact.

What it is for

The people you deal with at the customer: name, job title, email and phones. Emails from their addresses are linked to the customer automatically.

How to use it

- 1 Open the customer with «Edit» and choose the Contacts tab.
- 2 «New contact» adds a person; «Edit» (or a double-click) changes the selected one; «Delete» removes it after asking.
- 3 Fill in the first name (required), last name, job title, department, email, mobile, phone and notes.
- 4 Tick «Main contact» for the person you write to by default. A customer has only one: ticking it unticks the previous one.
- 5 «Save» stores the contact straight away, apart from the customer details; «Cancel» goes back to the list.

Tip: In a new customer, save it first and then open it again with «Edit» to add its contacts. The same contacts are in the Customer 360° view.

Leads

Where: CRM → Leads

CRM One360 0.1.2

Email CRM Settings System Help Demo company

Dashboard Customers **Leads** Opportunities Pipeline Tickets Tasks Customer 360°

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CRM → Leads

Leads
Prospects that are not customers yet.

Search [Company name, email or tax ID] Status (all) **2** Search **3** **4** New lead **5** Edit **6** Convert to customer **7** Send email

Company name	Phone	Status	Source	Assigned to	Created	Last activity
Blue Lagoon Pools	+1 (624) 555-2067	Contacted	Online ads	Administrator	16/09/26	10/05/26
Willow Tree Care Home	+44 20 5480 2141	Discarded	Inbound call	Administrator	13/09/26	13/03/26
Peak Performance Physio	+44 20 6111 1214	Qualified	Website	Administrator	15/07/26	14/09/26
Paws & Claws Pet Care	+44 20 1956 2207	Contacted	Trade show	Administrator	04/07/26	25/09/26
Do Re Mi Music School	+44 20 8229 2589	New	Website	Administrator	13/06/26	
Corner Café Collective	+44 20 1176 3493	New	Social media	Administrator	31/05/26	01/04/26
Silver Fern Catering	+353 1 615 8188	Contacted	Referral	Administrator	30/04/26	18/09/26
Nimbus Cloud Services	+1 (227) 555-1630	Qualified	Email	Administrator	28/04/26	15/04/26
Compass Digital Agency	+1 (825) 555-5356	Converted	Email	Administrator	24/04/26	
Urban Style Barbers	+44 20 7759 8182	Contacted	Social media	Administrator	23/04/26	02/09/26
Evergreen Landscaping	+353 1 385 5870	New	Referral	Administrator	22/04/26	
Secret Garden Florist	+353 1 572 8381	New	Referral	Administrator	13/04/26	22/06/26
Pedal Power Bikes	+44 20 1463 2405	Discarded	Online ads	Administrator	03/04/26	
Clear Road Driving School	+44 20 9000 6848	Converted	Inbound call	Administrator	24/03/26	
Spark Robotics Lab	+1 (436) 555-5689	Qualified	Trade show	Administrator	19/03/26	22/08/26
Atlas Removals	+44 20 7544 8165	Contacted	Website	Administrator	14/03/26	
Granite Stoneworks	+1 (933) 555-3638	New	Trade show	Administrator	15/01/26	03/05/26
Hopworks Craft Brewery	+44 20 8524 2254	New	Website	Administrator	08/01/26	17/07/26

Contacts Activities **7**

New contact Edit Delete

Name: Liam Wilson Job title: Head of Marketing P. ☒

What it is for

Prospects that may become customers: companies that asked for information, visited your stand at a trade show or came from your website.

How to use it

- 1** Search by company name, email or tax ID, and filter by status.
- 2** Status of each lead: New, Contacted, Qualified, Converted or Discarded. Source tells you where it came from.
- 3** Last activity: the date of the last call, meeting or email with the lead. Empty if there has been none.
- 4** «New lead» and «Edit» open the lead form.
- 5** «Convert to customer» turns the selected lead into a customer (next page).
- 6** Contacts tab: the people of the lead.
- 7** Activities tab: calls, meetings and notes. Logging them keeps «Last activity» up to date.

The lead form

Where: CRM → Leads → New lead or Edit

Edit lead

1 Company name *	Blue Lagoon Pools	Trade name	Blue Lagoon Pools
Tax ID		Phone	+1 (624) 555-2067
Email	hello@bluelagoonpools.example	Website	https://bluelagoonpools.example
2 Status	Contacted	3 Source	Online ads
4 Reason for discarding		5 Assigned to	Administrator
Notes	Interested in our CRM. Sector: Installations.		

Buttons: Delete, Cancel, Save

What it is for

The details of a lead. Fields marked with * are required.

How to use it

- 1 Company name (required), trade name, tax ID and contact details.
- 2 Status: move the lead forward as you work with it.
- 3 Source: where it came from (website, referral, trade show, online ads...). The CRM Dashboard counts leads by source.
- 4 If you discard the lead, write the reason.
- 5 Assigned to: the salesperson who handles it.

Converting a lead into a customer

When a lead buys from you or is ready to work with you, convert it into a customer from CRM → Leads.

1. Select the lead

In CRM → Leads, click the lead. It is best to qualify it first (status «Qualified»).

2. Press «Convert to customer»

The program creates a customer with the lead's details and moves its contacts, opportunities, tasks and activities to the new customer. The lead stays in the list with the status «Converted» and a link to the customer.

No duplicates

If a customer with the same tax ID already exists, the lead is joined to that customer instead of creating a second one.

3. Complete the customer

The new customer gets the next customer code automatically. Open it in CRM → Customers to add any details that were missing (address, tax ID).

Nothing is lost

Emails already linked to the lead are also shown in the new customer's Customer 360° view.

The Customer 360° view

Where: CRM → Customer 360°

CRM One360 0.1.2

Email CRM Settings System Help Demo company

Dashboard Customers Leads Opportunities Pipeline Tickets Tasks **Customer 360°**

⚠ DEMO COMPANY: the data are only examples. To work with your real data, switch to your company in System → Companies.

CRM → Customer 360°

Customer 360° view
Choose a customer to see its contacts, opportunities, tickets and activities at a glance.

1 Customer: Reload Send email 5

Harbour View Hotel 2 Open pipeline: 25,550
GB589345268 · info@harbourview.example · +44 20 1784 9740

Contacts Opportunities Emails Tickets Activities 3

4 New contact Edit Delete

First name	Last name	Job title	Mobile	Landline
Sean	Walsh	Managing Director	+44 7897 199283	+44 20 3147 8
Jack	O'Brien	Office Manager		+44 20 6641 4
Ryan	Davies	Finance Manager		+44 20 6899 7

Press 'New contact' to add a person, or select a contact and press 'Edit'.

What it is for

Everything about a customer on one screen: contacts, opportunities, emails, tickets and activities.

How to use it

- 1 Choose the customer.
- 2 Header with the customer's details and the open pipeline: the total of its open opportunities.
- 3 Tabs: Contacts, Opportunities, Emails, Tickets and Activities.
- 4 In Contacts you add, edit and delete the people of the customer, the same as in the customer record.
- 5 «Send email» writes to the customer from your email account; the email is linked to the customer.

Customer 360°: opportunities and activities

Where: CRM → Customer 360° → tabs

The screenshot shows the CRM One360 interface. The top navigation bar includes links for Email, CRM, Settings, System, and Help. Below this is a row of icons for Dashboard, Customers, Leads, Opportunities, Pipeline, Tickets, Tasks, and Customer 360°. The Customer 360° tab is selected. A warning message states: "DEMO COMPANY: the data are only examples. To work with your real data, switch to your company in System → Companies." Below this, the breadcrumb "CRM → Customer 360°" is shown. The main section is titled "Customer 360° view" with a subtext: "Choose a customer to see its contacts, opportunities, tickets and activities at a glance." A dropdown menu shows "Harbour View Hotel" with "Reload" and "Send email" buttons. Below this is a blue header for "Harbour View Hotel" with contact details and a "£25,550" value. The "Opportunities" tab is selected, showing a table with columns: Title, Stage, Status, Amount, Prob %, Close, and Assigned to. The table contains one row: "Marketing campaign" with Stage "Proposal", Status "Open", Amount "25,550.00", Prob % "50", Close "19/09/26", and Assigned to "Administrator".

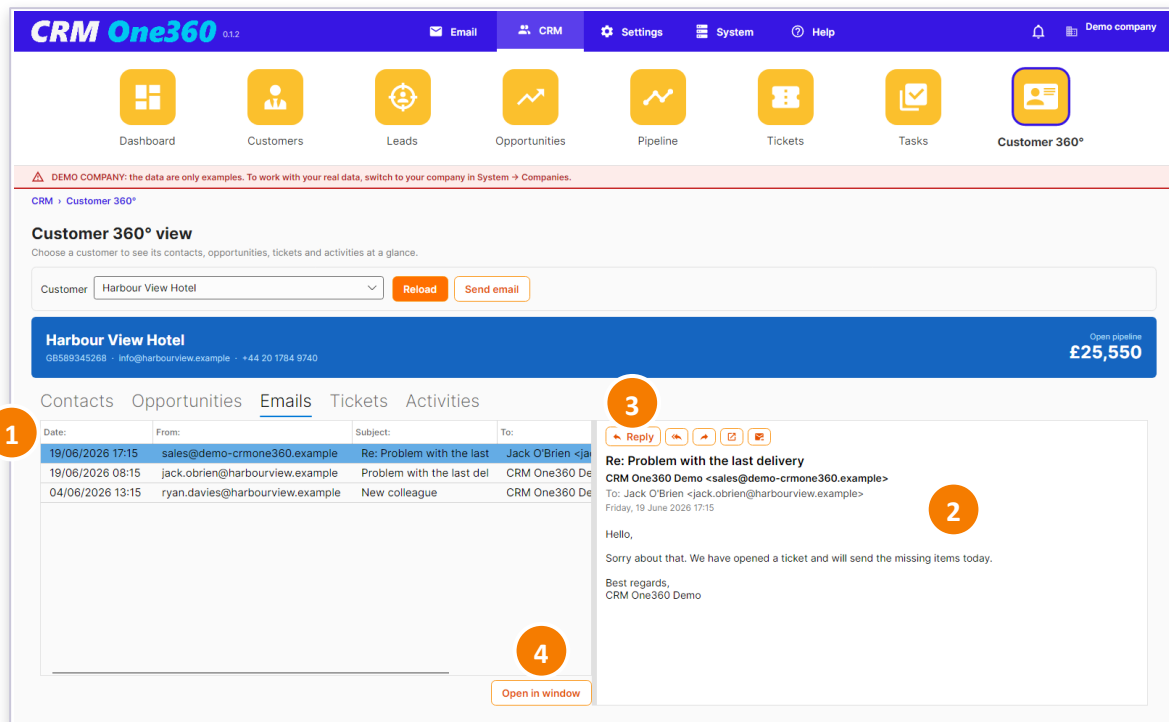
Opportunities tab: the customer's opportunities with stage, amount and probability.

The screenshot shows the CRM One360 interface with the "Activities" tab selected. The top navigation bar and icons are the same as in the previous screenshot. The breadcrumb "CRM → Customer 360°" is shown. The main section is titled "Customer 360° view" with the same subtext. The dropdown menu still shows "Harbour View Hotel". Below this is the same blue header for "Harbour View Hotel". The "Activities" tab is selected, showing a table with columns: Date, Type, Address, Subject, Min., and User. The table contains six rows of activity logs. Above the table are buttons for "Log activity" and "Delete". To the right of the table is a large empty box with the text: "Press 'Log activity' to record a call, email, meeting or note."

Activities tab: calls, meetings, notes and emails. «Log activity» adds one. The Tickets tab lists the customer's tickets.

Customer 360°: emails

Where: CRM → Customer 360° → Emails tab



What it is for

Every email exchanged with the customer and its contacts, sent or received, without leaving the record.

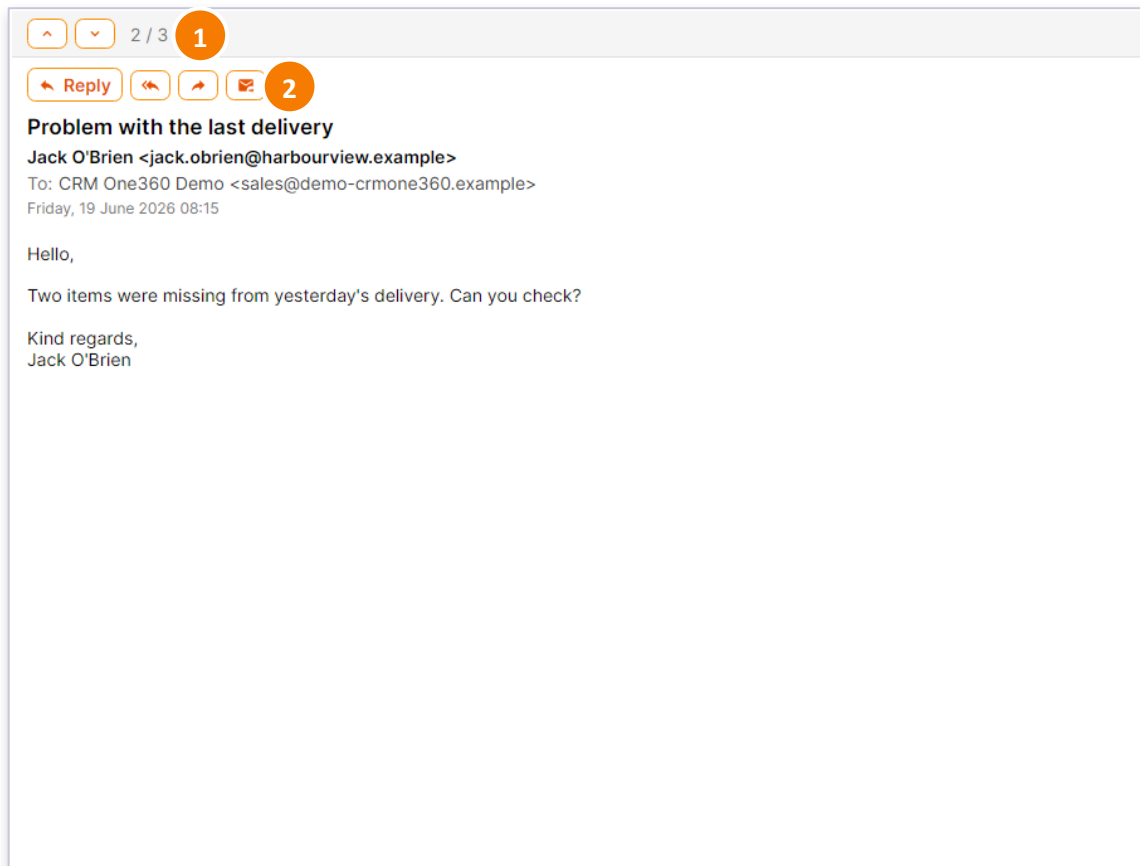
How to use it

- 1 The list: date, sender, recipients and subject, newest first.
- 2 Click an email, or move with the arrow keys, and it is shown on the right. Drag the separator to give more room to the list or to the email.
- 3 Above the email: Reply, Reply all, Forward, Open in window and Open in Mail (to move it, link it to another record or create a lead or a ticket from it).
- 4 A double-click, or «Open in window», opens the email in a window of its own (next page).

Tip: The list refreshes on its own: an email you send from the record appears as soon as it leaves, and the customer's replies appear with the next check of the mailbox.

The reading window

Where: **Customer 360°** or **Tickets** → **double-click an email**



What it is for

Reads an email in a larger window while the record stays open behind it.

How to use it

- 1 Previous and next go through the emails of the list it was opened from (also Alt+↑ and Alt+↓). The counter shows where you are.
- 2 Reply, Reply all and Forward open the window to write, as in Email.
- 3 Attachments are opened or saved from the bar above the text.

Tip: There is only one reading window: double-clicking another email shows it in the same window.

3

Sales

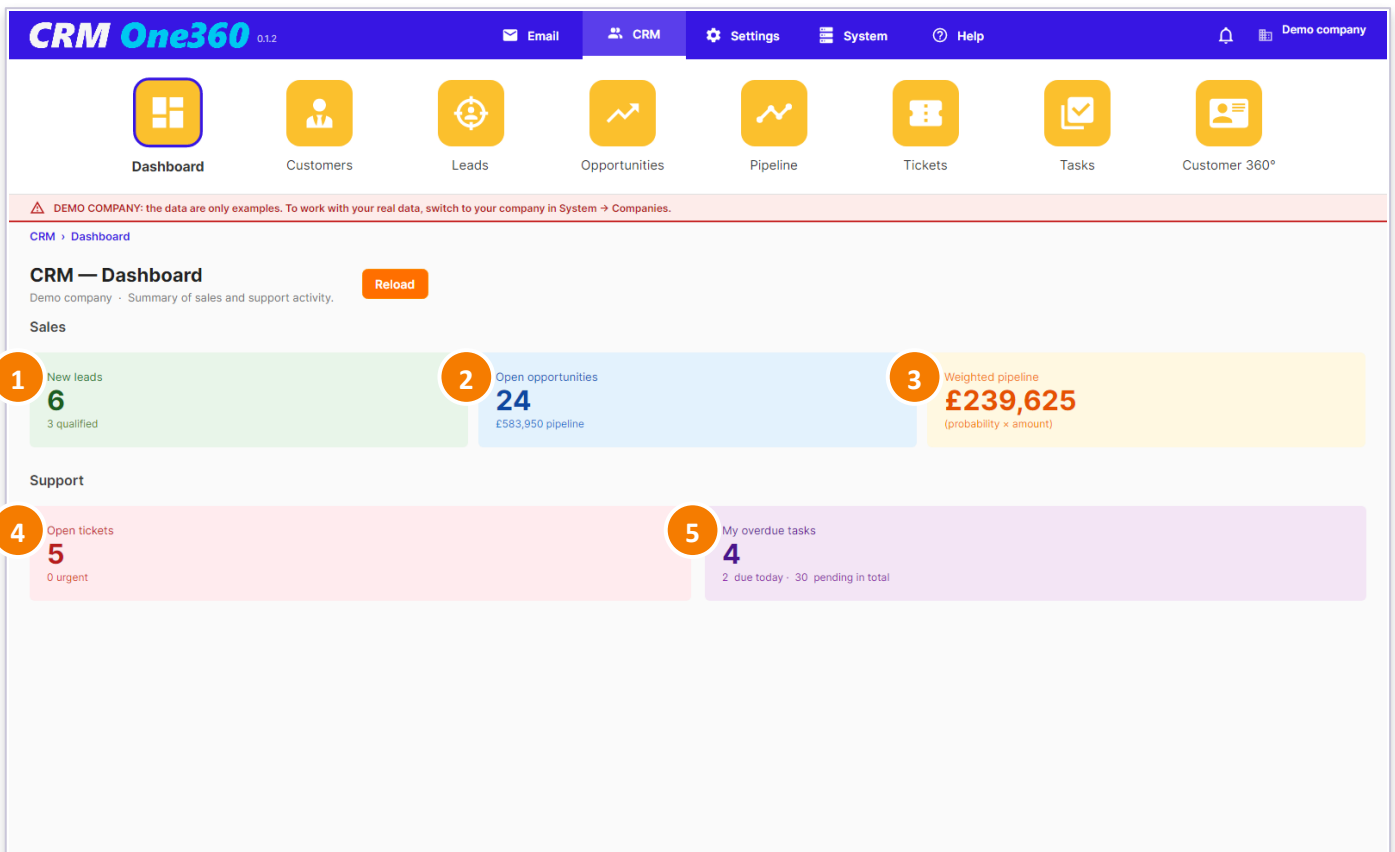
Opportunities are the possible sales you are working on. Each one moves through the stages of the pipeline until it is won or lost. The dashboard sums it all up.

In this chapter

- The CRM Dashboard
- The opportunity list
- The opportunity form
- The pipeline (Kanban board)

CRM Dashboard

Where: CRM → Dashboard



What it is for

A summary of sales and support, updated every time you open it or press «Reload».

How to use it

- 1 New leads of the period and how many are already qualified.
- 2 Open opportunities and the total amount in the pipeline.
- 3 Weighted pipeline: each amount multiplied by its probability. It is a realistic forecast of what you will sell.
- 4 Open support tickets and how many are urgent.
- 5 Your overdue tasks: tasks assigned to you whose due date has passed.

Opportunities

Where: CRM → Opportunities

CRM One360 0.1.2 | Email | CRM | Settings | System | Help | Demo company

Dashboard | Customers | Leads | **Opportunities** | Pipeline | Tickets | Tasks | Customer 360°

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CRM > Opportunities

Opportunities
Sales pipeline — list view. For the Kanban view with drag and drop use the “Pipeline” screen.

Status: **Open** (1) | Reload

(2) | (3) New (4) | Edit (5) | Win (6) | Lose

Title	Customer/Lead	Stage	Amount	Prob %	Est. close	Assigned to
Extended warranty	Summit Logistics Ltd	Qualification	44,300.00	10	21/10/26	Administrator
Cloud migration	Torres & Vidal Solicitors	Qualification	42,800.00	10	23/10/26	Administrator
Consulting retainer	Trustline Insurance Brokers	Qualification	10,550.00	10	21/08/26	Administrator
Annual maintenance contract	Evergreen Landscaping	Qualification	41,300.00	10	17/10/26	Administrator
Hardware upgrade	Northwind Traders Ltd	Qualification	37,550.00	10	19/06/26	Administrator
Website redesign	Oakridge Construction plc	Contacted	40,550.00	25	29/10/26	Administrator
Consulting retainer	Pixel Perfect IT Solutions	Contacted	15,050.00	25	27/08/26	Administrator
Annual maintenance contract	ClearSight Opticians	Contacted	42,800.00	25	29/05/26	Administrator
Marketing campaign	Harbour View Hotel	Proposal	25,550.00	50	19/09/26	Administrator
Software licence renewal	Compass Digital Agency	Proposal	3,800.00	50	09/09/26	Administrator
Software licence renewal	Granite Stoneworks	Proposal	3,800.00	50	03/10/26	Administrator
Staff training programme	Peak Performance Physio	Proposal	2,300.00	50	22/05/26	Administrator
Customer portal	Northwind Traders Ltd	Proposal	18,800.00	50	19/04/26	Administrator
Software licence renewal	Compass Digital Agency	Proposal	11,300.00	50	25/05/26	Administrator
Cloud migration	Oakridge Construction plc	Proposal	42,050.00	50	29/05/26	Administrator
CRM implementation	Atlas Removals	Proposal	30,050.00	50	28/02/26	Administrator
Cloud migration	BioMed Laboratories Inc	Negotiation	14,300.00	75	27/09/26	Administrator
Consulting retainer	Summit Logistics Ltd	Negotiation	24,800.00	75	08/10/26	Administrator
New branch rollout	Clear Road Driving School	Negotiation	6,050.00	75	09/09/26	Administrator

What it is for

The list of possible sales, with their customer or lead, stage, amount, probability and expected closing date.

How to use it

- 1 Status filter: open opportunities by default; also won, lost, on hold or all.
- 2 Stage of the sale: Qualification, Contacted, Proposal, Negotiation... (they are configured in Settings → CRM settings).
- 3 Probability of winning it, in %.
- 4 «New» creates an opportunity; «Edit» opens the selected one.
- 5 «Win» closes it as won (probability 100 %).
- 6 «Lose» closes it as lost after asking you to confirm. To keep the reason, open the opportunity and use «Lose» in the form (next page).

The opportunity form

Where: CRM → Opportunities → New or Edit

Edit opportunity

Title *

1 Customer 2 Lead (instead)

Contact 3 Stage

4 Estimated amount Probability %

5 Estimated close Assigned to

Description

6 Reason for losing

What it is for

The details of a possible sale.

How to use it

- 1 Customer: who you are selling to.
- 2 If it is not a customer yet, choose the lead instead. When the lead is converted, its opportunities move to the new customer.
- 3 Stage and probability of winning it. Update both as the sale moves forward.
- 4 Estimated amount of the sale.
- 5 Estimated closing date: the dashboard and the pipeline use it.
- 6 Reason for losing: write it and press «Lose» to close the opportunity as lost.

The pipeline

Where: CRM → Pipeline

The screenshot shows the CRM One360 interface with the Pipeline view selected. The top navigation bar includes links for Email, CRM, Settings, System, and Help. Below the navigation bar are icons for Dashboard, Customers, Leads, Opportunities, Pipeline (selected), Tickets, Tasks, and Customer 360°. A warning message states: "DEMO COMPANY: the data are only examples. To work with your real data, switch to your company in System → Companies."

The Pipeline view is titled "Pipeline (Kanban)" and includes a "Reload" button. A note says: "Drag an opportunity column header to change its stage. The final columns only show closings from the last 90 days (the full history is in the list view)."

The Pipeline is organized into columns representing different stages of the sales process, each with a number of opportunities and a total amount:

- Qualification** (5 opportunities, £170,500): Includes cards for "Extended warranty", "Cloud migration", "Consulting retainer", "Annual maintenance contract", and "Hardware upgrade".
- Contacted** (3 opportunities, £98,400): Includes cards for "Website redesign", "Consulting retainer", and "Annual maintenance contract".
- Proposal** (8 opportunities, £137,850): Includes cards for "Marketing campaign", "Software licence renewal", "Software licence renewal", "Staff training programme", "Customer portal", and "Software licence renewal".
- Negotiation** (8 opportunities, £171,400): Includes cards for "Cloud migration", "Consulting retainer", "New branch rollout", "Marketing campaign", "Data clean-up project", and "Cloud migration".
- Won** (7 opportunities, £185,350): Includes cards for "Consulting retainer", "Annual maintenance contract", "Customer portal", "Staff training programme", "Customer portal", and "Annual maintenance contract".
- Lost** (4 opportunities, £111,950): Includes cards for "New branch rollout", "Hardware upgrade", "Customer portal", and "Hardware upgrade".

Numbered callouts in the image highlight specific features:

- 1: Drag an opportunity column header to change its stage.
- 2: The final columns only show closings from the last 90 days (the full history is in the list view).
- 3: Each card is an opportunity: title, customer, amount, probability and the person in charge.
- 4: The Won and Lost columns only show the opportunities closed in the last 90 days.

What it is for

The same opportunities as a board: one column per stage. It is the quickest way to see how your sales are going and to move them forward.

How to use it

- 1 Each column is a stage, with the number of opportunities.
- 2 Total amount of the column.
- 3 Each card is an opportunity: title, customer, amount, probability and the person in charge. Drag it to another column to change its stage.
- 4 The Won and Lost columns only show the opportunities closed in the last 90 days. The full history is in the list.

Tip: Drop a card on «Won» or «Lost» to close the opportunity directly. To record why it was lost, use «Lose» in the opportunity form instead.

4

Support and tasks

Tickets record your customers' problems and questions until they are solved. Tasks are the things you have to do, with a due date and an optional reminder.

In this chapter

- Support tickets and their emails
- The ticket form
- Tasks
- The task form and reminders

Support tickets

Where: CRM → Tickets

CRM One360 0.1.2

Email CRM Settings System Help Demo company

Dashboard Customers Leads Opportunities Pipeline Tickets Tasks Customer 360°

⚠ DEMO COMPANY: the data are only examples. To work with your real data, switch to your company in System → Companies.

CRM → Tickets

Support tickets
Support cases opened by existing customers. Numbering (#) is sequential per company.

Status: Open **1** Reload **3** **4** New ticket **5** Edit **6** Resolve **7** Close **8** Send email

	Subject	Customer	Category	Priority	Status	Assigned to	Opened
31	Problem with the last delivery	Harbour View Hotel	Incident	High	Open	Administrator	07/10/26 07:06
1	Cannot log in after password change	Harmony Beauty Spa	Incident	High	Open	Administrator	29/09/26 17:00
18	Wrong VAT number on the quote	Bluebell Language School	Question	Medium	Open	Administrator	03/10/26 13:15
6	Printer keeps jamming	Family Fresh Supermarkets	Incident	Medium	Open	Administrator	26/09/26 12:45

8 Ticket emails

Date:	From:	Subject:	To:
19/06/2026 17:15	sales@demo-crmone360.example	Re: Problem with the last	Jack O'Brien <jack.obrien@harbourview.example>
19/06/2026 08:15	jack.obrien@harbourview.example	Problem with the last del	CRM One360 Demo

Re: Problem with the last delivery
CRM One360 Demo <sales@demo-crmone360.example>
To: Jack O'Brien <jack.obrien@harbourview.example>
Friday, 19 June 2026 17:15

Hello,

Sorry about that. We have opened a ticket and will send the missing items today.

Best regards,
CRM One360 Demo

Open in window

What it is for

The support cases opened by your customers: incidents, questions and requests.

How to use it

- 1 Status filter: open tickets by default. A ticket can be Open, In progress, Waiting on customer, Resolved or Closed.
- 2 Each ticket gets a number, consecutive within the company.
- 3 Category and priority help you decide what to do first. Categories are configured in Settings → CRM settings.
- 4 «New ticket» opens an empty ticket; «Edit» opens the selected one.
- 5 «Resolve» marks it as solved.
- 6 «Close» closes it for good once the customer agrees.
- 7 «Send email» writes to the customer about the ticket. The subject ends with «[Ticket #31]» (the ticket number), so the customer's reply goes back to the ticket.

Support tickets (continued)

How to use it (continued)

- 8 Ticket emails: the emails of the selected ticket, with the selected one on the right, as in the Customer 360° view. A double-click opens it in the reading window.

Tip: The ticket's emails are those with its number in the subject, those linked by hand and the email it was created from. If a customer writes about a ticket without its number, link the email by hand from Email (chapter 5).

The ticket form

Where: CRM → Tickets → New ticket or Edit

Edit ticket

Subject *	Problem with the last delivery		
1 Customer *	Harbour View Hotel	Contact	(none)
2 Category	Incident	Priority	High
3 Status	Open	Assigned to	Administrator
4 Description *	Part of the last delivery arrived damaged. The customer asks for a replacement.		
5 Resolution			

Delete
Cancel
Save

What it is for

The details of a support case. Fields marked with * are required.

How to use it

- 1 Customer and, optionally, the contact person who reported it.
- 2 Category and priority.
- 3 Status and the person in charge.
- 4 Description: what is happening, in the customer's words.
- 5 Resolution: what was done to solve it. It stays in the ticket history.

Tasks

Where: CRM → Tasks

CRM One360 0.1.2

Email CRM Settings System Help

Dashboard Customers Leads Opportunities Pipeline Tickets **Tasks** Customer 360°

⚠ DEMO COMPANY: the data are only examples. To work with your real data, switch to your company in System → Companies.

CRM → Tasks

Tasks

To-dos with due dates and reminders. They can be linked to a lead, customer, opportunity or ticket.

Status (all) ☒ Only mine Reload New task Edit Complete

Title	Status	Priority	Due	Linked to	Assigned to
Confirm the meeting	Completed	Low	14/01/2026 16:45	Opportunity	Administrator
Check payment status	Completed	Low	23/01/2026 08:00	Opportunity	Administrator
Introduce the support team	Completed	Low	02/04/2026 09:30	Opportunity	Administrator
Call about the renewal	Completed	Medium	15/04/2026 08:30	Opportunity	Administrator
Send the brochure	Completed	High	08/06/2026 15:45	Opportunity	Administrator
Call about the renewal	Completed	High	17/06/2026 08:45	Opportunity	Administrator
Follow-up call	Completed	Medium	17/07/2026 17:15	Opportunity	Administrator
Send the brochure	Completed	Low	27/07/2026 12:15	Opportunity	Administrator
Prepare product demo	Completed	High	29/07/2026 11:15	Opportunity	Administrator
Review the contract	Completed	Low	26/08/2026 09:45	Opportunity	Administrator
Visit the customer	Completed	Low	14/09/2026 08:30	Opportunity	Administrator
Follow-up call	Completed	Low	14/09/2026 13:45	Opportunity	Administrator
Confirm the meeting	Completed	Low	20/09/2026 12:45	Opportunity	Administrator
Schedule training	Completed	High	21/09/2026 10:15	Opportunity	Administrator
Visit the customer	Completed	Low	24/09/2026 12:30	Opportunity	Administrator
Prepare quarterly review	Pending	Low	30/09/2026 10:00	Customer	Administrator
Collect feedback	In progress	High	02/10/2026 10:00	Customer	Administrator
Follow-up call	Pending	Low	03/10/2026 10:00	Customer	Administrator
Confirm the meeting	Pending	Low	05/10/2026 10:00	Customer	Administrator

What it is for

Your to-do list: calls to make, quotes to send, visits to plan.

How to use it

- 1 Tick «Only mine» to see only the tasks assigned to you. The status filter shows the tasks in one status (pending, in progress, completed, cancelled) or all of them.
- 2 Due date and time.
- 3 Linked to: the customer, lead, opportunity or ticket the task belongs to.
- 4 «New task» and «Edit» open the task form.
- 5 «Complete» marks the selected task as done.

The task form and reminders

Where: CRM → Tasks → New task or Edit

Edit task

1 Title * Introduce the support team

Description Demo task of the DEMO company.

Status Completed Priority Low

2 Due 02/04/2026 3 Reminder <dd/MM/yyyy> 7

4 Link to Opportunity Cloud migration

5 Assigned to Administrator

Delete Cancel Save

What it is for

What has to be done, when and by whom.

How to use it

- 1 Title (required) and description.
- 2 Due date.
- 3 Reminder: at that date and time the person in charge receives a notice in the bell and, if their user has an email address, an email.
- 4 Link to: choose the type (customer, lead, opportunity or ticket) and then the record.
- 5 Assigned to: who has to do it.

Tip: Each reminder is sent only once, even if the person has the program open on several computers.

5

Email

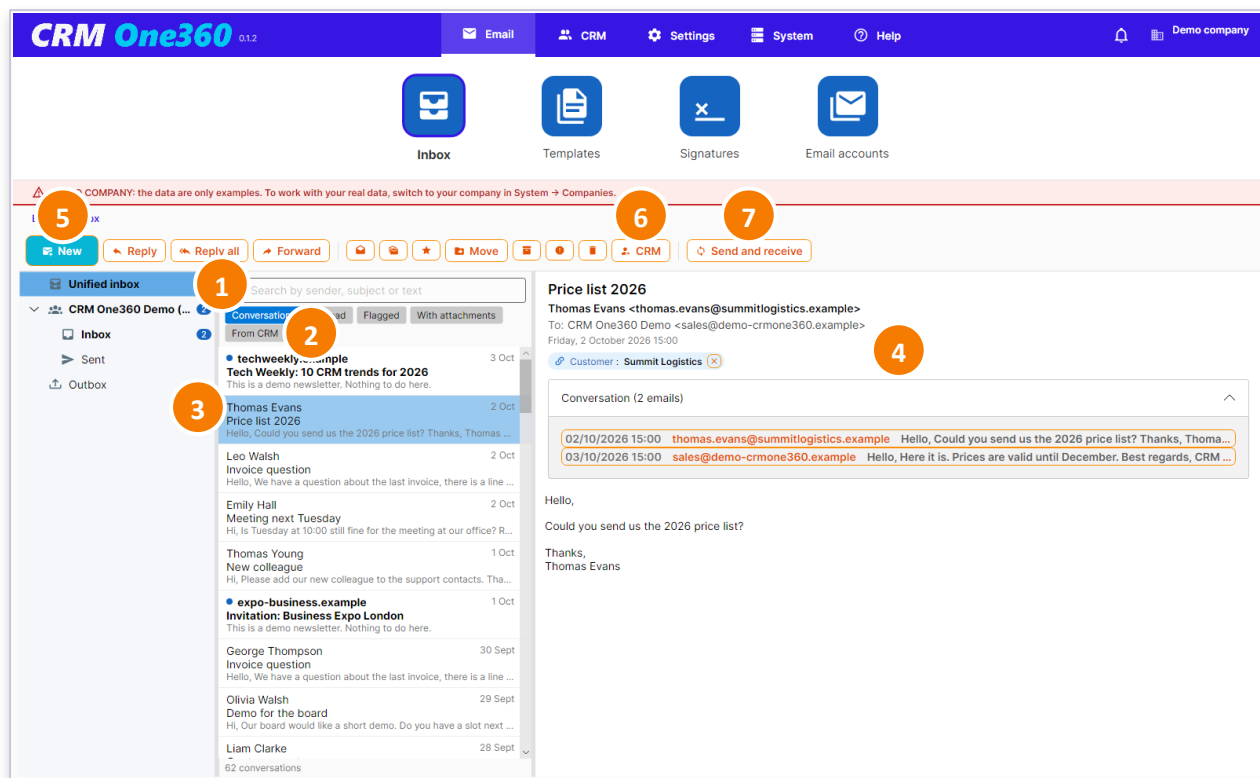
CRM One360 receives and sends your email while it is open. Every email from or to a customer, lead or contact is linked to its record, so the whole conversation is in the CRM.

In this chapter

- The inbox and reading an email
- Writing, replying and forwarding
- Linking an email to the CRM
- Templates and signatures
- Email accounts and rules

The inbox

Where: **Email** → **Inbox**



What it is for

Your email, with the folders of every account you can use.

How to use it

- 1 Folders: the unified inbox (all your accounts together), each account with its Inbox and Sent folders, and the Outbox with the emails waiting to be sent.
- 2 Search and quick filters: Conversations groups the emails of the same thread; Unread, Flagged, With attachments and From CRM (only emails linked to a CRM record).
- 3 List of emails. A blue dot means unread. Click one to read it.
- 4 Reading pane: sender, recipients, the CRM records it is linked to and, in a conversation, all its emails.
- 5 «New», «Reply», «Reply all» and «Forward» open the window to write.
- 6 «CRM» links the email to a record (a customer, lead, ticket or opportunity) or creates one from it: a lead, a ticket, an opportunity, a task or a contact.
- 7 «Send and receive» checks the accounts now, without waiting for the next automatic check.

Tip: The small buttons next to «Move» mark as read or unread, flag, archive, mark as spam and delete.

Writing an email

Where: **Email** → **Inbox** → **New, Reply or Forward**

The screenshot shows the email composition interface. At the top, there is a toolbar with buttons: Send (blue), Schedule, Save draft, Template, Attach, and Plain text. Below the toolbar, the email header fields are visible: 'From:' (CRM One360 Demo <sales@demo-crmone360.example>), 'To:' (Thomas Evans <thomas.evans@summitlogistics.example>), and 'Subject:' (Re: Price list 2026). A 'Cc / Bcc' button is located to the right of the 'To:' field. The main body of the email is a large, empty text area. Numbered callouts are placed as follows: 1 points to the 'From:' field, 2 points to the 'To:' field, 3 points to the 'Cc / Bcc' button, and 4 points to the main text area.

What it is for

Writing, replying and forwarding emails.

How to use it

- 1 From: the account it is sent from. Its default signature is added automatically.
- 2 To: start typing a name or address and choose it from the suggestions (contacts, customers and leads).
- 3 «Cc / Bcc» shows the copy fields.
- 4 The text of the email, with formatting (bold, lists, links...). «Plain text» removes the formatting.

Buttons at the top: «Send» puts the email in the Outbox and sends it straight away; «Schedule» sends it later, on the date and time you choose; «Save draft» keeps it to finish later; «Template» fills the subject and text from a template with the recipient's details; «Attach» adds files. When an email leaves, it appears straight away in Sent and in the records it is linked to (customer, ticket...).

Linking email and CRM

Emails are linked to the CRM automatically. You only need to do it by hand in a few cases.

Automatic links

When an email arrives from, or is sent to, the address of a customer, lead or contact, it is linked to that record. If its subject has a ticket number, such as «[Ticket #31]», it is also linked to that ticket. You see it in the Customer 360° view and in Tickets.

Link by hand

Select the email, press «CRM» → «Link to a customer, lead, ticket or opportunity...» and choose the record (next page). The link appears under the sender; press its × to remove it.

Create from an email

From the same «CRM» button you can create a lead, a ticket, an opportunity, a task or a contact with the email's details. Useful for requests that arrive from new addresses.

Emails with no reply

If a customer's email gets no answer for several days, the program warns you in the bell. The number of days is set in Email → Email accounts.

Linking an email by hand

Where: **Email** → **Inbox** → **CRM** → **Link to...**

Search for the customer or lead by name, tax ID or email, the ticket by number or subject, or the opportunity by title.

delivery

Ticket #31 Problem with the last delivery

Cancel Link

What it is for

Links the selected email to the record you choose, when the automatic link did not find it: for example, a customer reply that lost the ticket number.

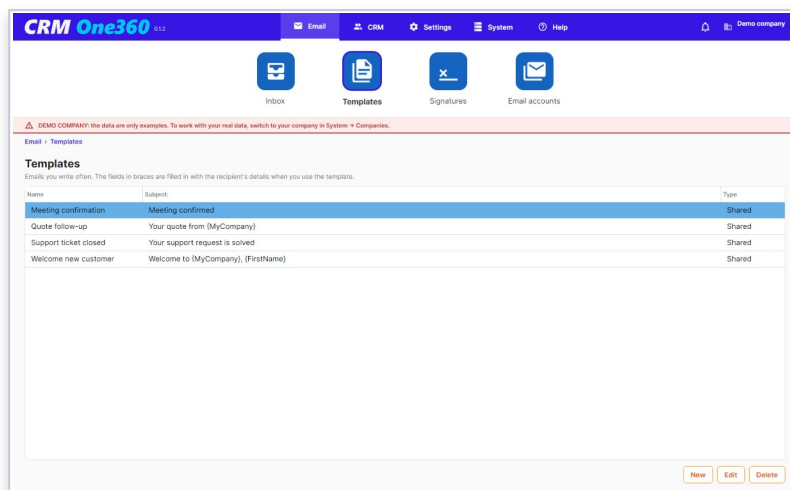
How to use it

- 1 Type part of what you are looking for: customers and leads by name, tax ID or email; tickets by number («31» or «#31») or subject; opportunities by title.
- 2 Choose the record in the list (its type is shown before the name) and press «Link», or double-click it.

Tip: When you search for a ticket number, that ticket comes first.

Templates

Where: **Email** → **Templates**



Template

Name:

Subject:

☒ Shared with all users

Fields you can use: (FirstName) (LastName) (FullName) (Company) (Email) (MyName) (MyEmail) (MyCompany) (Date)

Hello (FirstName),
This is to confirm our meeting. If anything changes, just reply to this email.
See you soon,
(MyName)

Template window: name, subject, whether it is shared, and the text.

What it is for

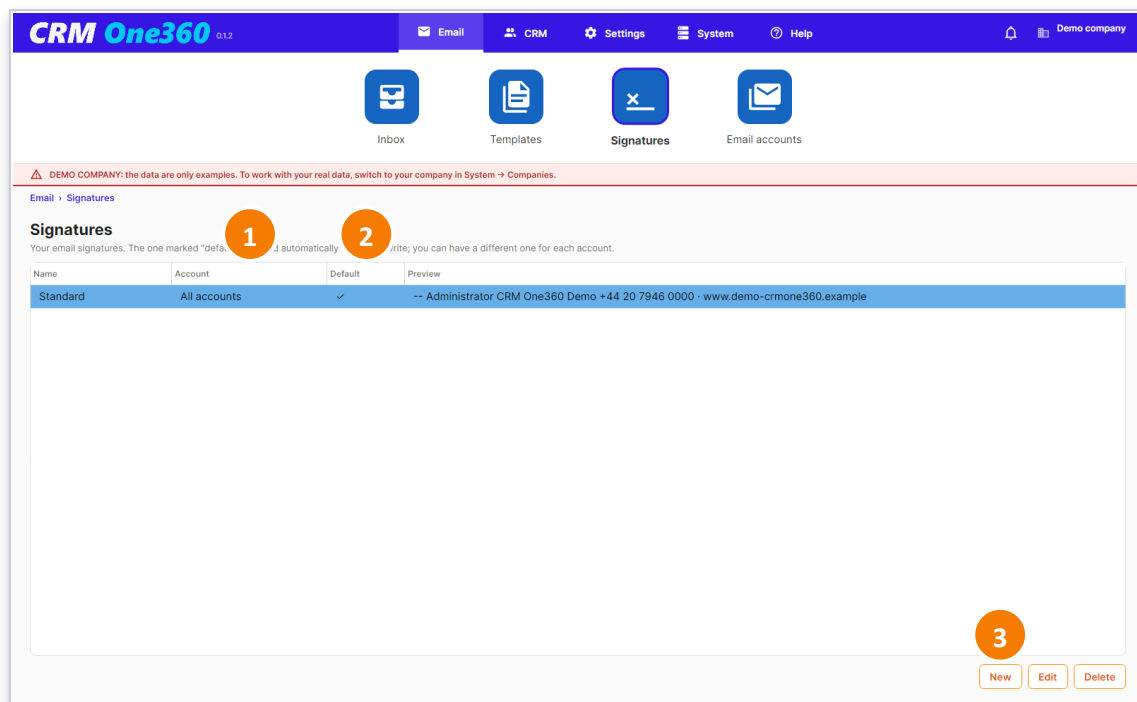
Emails you write often (welcome, quote follow-up, meeting confirmation...). When you use a template, the fields in braces are filled in with the recipient's details.

How to use it

- 1 Press «New», or select a template and press «Edit».
- 2 Write the name, the subject and the text. You can use these fields in both: {FirstName}, {LastName}, {FullName}, {Company}, {Email}, {MyName}, {MyEmail}, {MyCompany} and {Date}.
- 3 Tick «Shared with all users» so that everyone can use it (you need the permission to manage shared accounts); otherwise it is only yours.
- 4 To use it, press «Template» in the window where you write the email.

Signatures

Where: **Email** → **Signatures**



What it is for

The text added at the end of your emails: name, company, phone...

How to use it

- 1 Each signature can be for one account or for all of them.
- 2 The one marked «Default» is added automatically when you write from that account.
- 3 «New» and «Edit» open the signature window, where you write the text with formatting.

Tip: Each user has their own signatures. In the DEMO company each user already has one called «Standard».

Email accounts

Where: **Email** → **Email accounts**

The screenshot shows the 'Email accounts' page in CRM One360. The page has a blue header with the CRM One360 logo and navigation tabs for Email, CRM, Settings, System, and Help. Below the header are icons for Inbox, Templates, Signatures, and Email accounts. A warning banner at the top states: 'DEMO COMPANY: the data are only examples. To work with your real data, switch to your company in System → Companies.' The main content area is titled 'Email accounts' and includes a description: 'Your email accounts and those shared with you. The program receives and sends emails in the background while it is open.' Below this is a table with columns: Email address, Name shown to recipients, Type, Server type, and Status. The table contains one entry: 'sales@demo-crmone360.example', 'CRM One360 Demo', 'Shared', 'POP3', and 'Waiting to receive'. At the bottom of the page are two settings sections. The first section, 'Warn about unanswered customer emails after', has a dropdown set to '3' days and a 'Save' button. The second section, 'Warn administrators when the data exceeds', has a dropdown set to '5000' MB and a 'Save' button. The current data size is shown as 'Currently 1 MB.'.

Email accounts

Your email accounts and those shared with you. The program receives and sends emails in the background while it is open.

Email address	Name shown to recipients	Type	Server type	Status
sales@demo-crmone360.example	CRM One360 Demo	Shared	POP3	Waiting to receive

Send and receive New Edit Delete Rules... Reload

Warn about unanswered customer emails after 3 days (0 = don't warn) Save

Warn administrators when the data exceeds 5000 MB Save Currently 1 MB.

What it is for

Your email accounts and the ones shared with you (for example sales@ or info@).

How to use it

- 1 Personal accounts are yours; shared accounts are used by several people.
- 2 Status of each account: when it last received email or the error, if there is one.
- 3 «New» adds an account; «Edit» changes the selected one.
- 4 «Rules...» sets rules for the incoming email of the account.
- 5 Days without reply after which the program warns you about a customer email (0 = never).
- 6 Size of the data from which administrators are warned.

Adding an email account

Where: **Email** → **Email accounts** → **New or Edit**

The screenshot shows the 'Email account' configuration form. It includes fields for email address, name shown to recipients, password, and advanced settings like server type, incoming/outgoing servers, and user name. There are also checkboxes for account options and a list of users to share the account with. Numbered steps 1 through 6 are overlaid on the form to guide the user through the process.

1. Email address: sales@demo-crmone360.example
2. Name shown to recipients: CRM One360 Demo
3. Password: (blank)
4. Advanced settings: Server type (POP3), Incoming server (pop.demo.invalid, 995, SSL/TLS), Outgoing server (SMTP) (smtp.demo.invalid, 587, STARTTLS), User name (sales@demo-crmone360.example), Days to download the first time (180).
5. Shared account (for example info@ or sales@): Choose who can use it and who can send from it. (Administrators: Administrator, Laura Bennett, Mark Sullivan, Partner)
6. Test account: (button)

What it is for

Connects CRM One360 to an email account of your own domain or hosting provider (IMAP or POP3 with a password).

Step by step

1. Type the email address and the name the recipients will see.
2. Press «Configure automatically»: the program finds the servers of the usual providers.
3. Type the password of the account.
4. If your provider is not found, fill in the advanced settings: server type (IMAP or POP3), servers, ports and security.
5. Shared account (administrators): tick who can use it and who can send from it.
6. Press «Test account» and, if everything is correct, «Save».

Caution: Gmail and Outlook.com / Hotmail accounts cannot be used: they no longer let programs sign in with a user name and password.

Email rules

Where: **Email** → **Email accounts** → **Rules...**

Rules for sales@demo-crmone360.example
They are applied in order to every email arriving in the inbox.

Name	Rule	Active

1 Name:

2 If the contains

3 then

☒ Active ☐ Don't apply the following rules

4 New Delete Save

5 ↓

What it is for

Rules sort the incoming email of an account automatically, for example moving newsletters to a folder.

How to use it

- 1 Name of the rule.
- 2 Condition: the field (sender, subject or recipient) and the text it must contain.
- 3 Action: move to a folder, mark as read, flag, link to a customer or create a support ticket.
- 4 Tick «Don't apply the following rules» to stop at this one when it matches.
- 5 The arrows change the order: rules are applied from top to bottom.

6

Settings

Company details and currency, pipeline stages and ticket categories, users, roles and who handles each customer. Most of these screens are for administrators.

In this chapter

- Company details
- CRM settings: pipeline stages and ticket categories
- Users
- Roles and permissions
- Customer assignment

Company

Where: **Settings** → **Company**

CRM One360 0.1.2

Email CRM **Settings** System Help

Company CRM settings Users Roles and permissions Email accounts Claude (AI assistant) Customer assignment Preferences

⚠ DEMO COMPANY: the data are only examples. To work with your real data, switch to your company in System → Companies.

Settings → Company

Company

Details of the company you are working in

Code DEMO

1 Name Demo company

2 Tax ID

3 Currency GBP — Pound sterling (E)

4 Save

What it is for

The name, tax ID and currency of the company you are working in.

How to use it

- 1 Name of the company, as it appears at the top right of the window.
- 2 Tax ID.
- 3 Currency of the amounts: opportunities, pipeline, dashboard and Customer 360°. New companies start with the currency of Windows' region.
- 4 Press «Save».

Tip: Creating, deactivating and switching companies is done in System → Companies.

CRM settings: pipeline stages

Where: **Settings** → **CRM settings** → **Pipeline stages**

CRM One360 0.1.2

Settings → CRM settings

CRM settings [Reload](#)

Pipeline stages (Kanban) and categories to classify support tickets.

Pipeline stages **Ticket categories** 1

Pipeline stages (Kanban) 2

[New](#) [E](#) 3

Order	Code	Name	Prob %	Won	Lost	Active
10	QUAL	Qualification	10	☐	☐	☒
20	CONT	Contacted	25	☐	☐	☒
30	PROP	Proposal	50	☒	☒	☒
40	NEGO	Negotiation	75	☐	☐	☒
50	WON	Won	100	☒	☐	☒
60	LOST	Lost	0	☐	☒	☒

Edit stage 4

Code *
PROP

Name *
Proposal

Order
30 ^ v

Default probability %
50 ^ v

Colour (hex, e.g. #1565C0)
#FFA726

☐ Final stage: Won

☐ Final stage: Lost

☒ Active (visible in the pipeline)

[Save](#) [Cancel](#) 5

What it is for

The stages an opportunity goes through, in order. They are the columns of the pipeline.

How to use it

- 1 Two tabs: Pipeline stages and Ticket categories.
- 2 Each stage has an order, a code, a name and a default probability.
- 3 «New» adds a stage; «Edit» changes the selected one.
- 4 Stage form: code, name, order, default probability and colour of the pipeline column.
- 5 Mark the final stages: one for won and one for lost opportunities. Untick «Active» to hide a stage you no longer use.

Caution: Do not delete stages that have opportunities: deactivate them instead.

CRM settings: ticket categories

Where: **Settings** → **CRM settings** → **Ticket categories**

CRM One360 0.1.2

Email CRM **Settings** System Help Demo company

Company CRM settings Users Roles and permissions Email accounts Claude (AI assistant) Customer assignment Preferences

⚠ DEMO COMPANY: the data are only examples. To work with your real data, switch to your company in System → Companies.

Settings > CRM settings

CRM settings Reload

Pipeline stages (Kanban) and categories to classify support tickets.

Pipeline stages Ticket categories

Support ticket categories			
Code	Name	Colour	Active
IMPR	Improvement	#43A047	☒
INC	Incident	#E53935	☒
QUES	Question	#1E88E5	☒
TRAI	Training	#8E24AA	☒
WARR	Warranty	#FB8C00	☒

Select a category and press Edit, or press New to create one.

What it is for

The categories used to classify support tickets (incident, question, request...). Each one has a code, a name, a colour and can be deactivated.

How to use it

- 1 Press «New» to add a category, or select one and press «Edit».
- 2 Type the code, the name and the colour, and press «Save».

Users

Where: **Settings** → **Users**

CRM One360 0.1.2

Settings → Users

Users
4 user(s).

Login	Name	Active	Locked until
admin	Administrator	☒	
laura	Laura Bennett	☒	
mark	Mark Sullivan	☒	
sophie	Sophie Carter	☒	

Create new user

Login:
 Name:
 Password:
 Email:
 As administrator: ☐
Create user

User details

1 Login: laura
 2 Name: Laura Bennett
 3 Email: laura@demo-crmone360.com
 4 Created: 06/10/2026

Deactivate **Reactivate** **Reset**

5 Password:

User roles

SALES

Active roles

Code	Description
ADMIN	Administrator: sees and manages everything
READONLY	Read-only access to own portfolio
SALES	Sales: own customer portfolio and email
SUPPORT	Support: tickets and tasks of own portfolio

What it is for

The people who can sign in to the company, and their roles.

How to use it

- 1 Click a user to see their details.
- 2 To create a user, fill in login, name, password and email at the bottom left and press «Create user». Tick «As administrator» to give them the ADMIN role.
- 3 «Deactivate» stops the user signing in; «Reactivate» lets them in again. Their history is kept.
- 4 To reset a forgotten password, type a new one and press «Reset».
- 5 Roles of the user.
- 6 Available roles. Use the arrows to give or take away a role.

Tip: The email of each user is used to send them task reminders.

Roles and permissions

Where: **Settings** → Roles and permissions

CRM One360 0.1.2

Settings → Roles and permissions

Roles and permissions
4 role(s) · 11 available permission(s).

Code	Description	Active
ADMIN	Administrator: sees all	☒
READONLY	Read-only access to	☒
SALES	Sales: own customer	☒
SUPPORT	Support: tickets and	☒

Role details

Code: SALES

Description: Sales: own customer portfolio and email

Active: ☒

Permissions of the role

Code	Description
CRM.ACCESS	Access the CRM
MAIL.ACCESS	Use email

Available permissions

Code	Description
COMPANIES.MANAGE	Manage companies
CRM.ACCESS	Access the CRM
CRM.ASSIGN	Assign and reassign customers and leads
CRM.CONFIGURE	Configure pipeline stages and ticket categories
CRM.VIEW_ALL	See all customers and leads, regardless of
MAIL.ACCESS	Use email
MAIL.SHARED_ACCOUNTS	Create and manage shared email accounts
SECURITY.ROLES	Manage roles and permissions
SECURITY.USERS	Manage users

Create new role

CODE Description +

What it is for

A role is a set of permissions. Users get permissions through their roles.

How to use it

- 1 Choose a role. The program comes with ADMIN, SALES, SUPPORT and READONLY.
- 2 Change its description or deactivate it and press «Save changes».
- 3 Permissions the role already has.
- 4 Permissions you can add. Use the arrows to add or remove them.
- 5 To create a role, type its code and description and press «+».

Tip: Important permissions: «See all customers and leads» (CRM.VIEW_ALL) shows the whole portfolio; without it each user only sees their own customers. «Assign and reassign customers» (CRM.ASSIGN) opens Customer assignment.

Customer assignment

Where: **Settings** → **Customer assignment**

CRM One360 0.1.2

Settings → Customer assignment

Who handles each customer and lead. Users without the 'See all customers' permission only see their own.

Unassigned only

Type	Name	Tax ID	State / Province	Sector	Handled by
☐ Customer	AquaFlow Pooling	30-7731943	Texas	Installations	★ Administrator
☐ Lead	Atlas Removals				★ Administrator
☐ Customer	BioMed Laboratories Inc	43-8823619	California	Healthcare	★ Administrator
☐ Lead	Blue Lagoon Pools				★ Administrator
☐ Customer	Bluebell Language School	GB511761594	Oxfordshire	Education	★ Administrator
☐ Customer	Brightside Dental Clinic	GB238910798	Greater Manchester	Healthcare	★ Administrator
☐ Customer	Clear Road Driving School				★ Administrator
☐ Customer	ClearSight Opticians	GB537374938	Nottinghamshire	Healthcare	★ Administrator
☐ Customer	Compass Digital Agency				★ Administrator
☐ Lead	Corner Café Collective				★ Administrator
☐ Customer	Crown Pharmacy	GB275346082	Merseyside	Healthcare	★ Administrator
☐ Lead	Do Re Mi Music School				★ Administrator
☐ Lead	Evergreen Landscaping				★ Administrator
☐ Customer	Family Fresh Supermarkets	GB424662917	Leicestershire	Retail	★ Administrator

46 customer(s) and lead(s).

Actions:

- Select / clear all
- User
- Reason (optional)
- Assign to this user
- Remove from this user
- Make owner
- Transfer the whole portfolio
- From this user...
- ...to the user chosen above. Useful when a sales rep leaves or is on holiday.
- Transfer
- History of the selected one

What it is for

Who handles each customer and lead. Users without the «See all customers» permission only see their own.

How to use it

- 1 Filter by user, province, sector, tag or name; «Unassigned only» shows the ones nobody handles.
- 2 Handled by: the users of each customer. The star marks the owner.
- 3 Tick the customers and leads you want to change (or «Select / clear all»).
- 4 Choose a user and press «Assign to this user», «Remove from this user» or «Make owner». The user receives a notice.
- 5 Transfer the whole portfolio from one user to another, for example when a salesperson leaves or is on holiday.

7

Claude, your AI assistant

With Claude Desktop installed on the same computer you can ask about your CRM in plain language and, if an administrator allows it, ask Claude to create and update records or to send emails for you.

In this chapter

- What you can ask Claude
- Connecting Claude Desktop
- What Claude is allowed to do

What you can ask Claude

Claude reads the CRM of the company you choose and answers in your language. Some examples:

Questions

«Which opportunities close this month?» · «Which tickets does Laura have open?» · «Summarise everything about Harbour View Hotel» · «Which customers have not been contacted for three months?»

Email (if allowed)

«Show me the last emails from Summit Logistics» · «Reply to Thomas Evans with the 2026 price list in the body». Claude only reads the accounts an administrator has ticked and never sends attachments. If the email is about a ticket, Claude adds «[Ticket #31]» to the subject so the reply goes back to the ticket.

Changes (if allowed)

«Create a task to call Blue Lagoon Pools on Monday» · «Move the Website redesign opportunity to Proposal» · «Log a call with Emily Hall» · «Link this email to ticket 31». Everything Claude does is signed by the user «Claude (AI assistant)», so you can always see who created or changed a record.

Always under your control

Claude never deletes or deactivates records, never deletes, moves or archives emails and never sees passwords.

Claude settings

Where: **Settings** → **Claude (AI assistant)** · administrators only

CRM One360 0.1.2

Email CRM **Settings** System Help

Company CRM settings Users Roles and permissions Email accounts **Claude (AI assistant)** Customer assignment Preferences

⚠ DEMO COMPANY: the data are only examples. To work with your real data, switch to your company in System → Companies.

Settings > Claude (AI assistant)

Claude (AI assistant)

With Claude Desktop installed on this computer you can ask about your CRM One360 data in plain language: "Which opportunities are open?", "Which tickets does Laura have?". Here you decide what else Claude can do in this company.

CRM data

Claude can always look up customers, contacts, leads, opportunities, tickets, tasks and activities.

☐ Allow Claude to create and change CRM data

Email

Tick the accounts whose emails Claude can read and, if you allow sending, which ones it can send from. Claude sends without attachments and never deletes, moves or archives emails.

☐ Allow Claude to send emails (without attachments)

sales@demo-crmone360.example

Shared account

☐ Read ☐ Send

Save

Never changed. Claude only looks up the CRM and sees no email.

What Claude never does

Claude never deletes or deactivates any record, never deletes, moves or archives emails, never sends attachments and cannot see any password. Of users it only sees the name, to assign customers, tickets and tasks to them.

Everything Claude creates, changes or sends is signed by the user "Claude (AI assistant)" and recorded in the program's audit log. That user cannot sign in to the program.

How to connect Claude Desktop

Open Claude Desktop, go to Settings → Extensions and drag this file there:

C:\CRMOne360\mcp\crmone360.mcpb

What it is for

Decides what Claude can do in this company. Out of the box Claude only looks up the CRM and sees no email.

How to use it

- 1 Tick it to let Claude create and change customers, leads, opportunities, tickets, tasks and activities.
- 2 Tick it to let Claude send emails, always without attachments.
- 3 For each account, tick «Read» so Claude can read its emails and «Send» so it can send from it.
- 4 Press «Save». The change applies to the next question.
- 5 The file to drag into Claude Desktop (next page).

Connecting Claude Desktop

You only do this once on each computer.

1. Install Claude Desktop

Download it from claude.ai and sign in with your Claude account.

2. Add the CRM One360 extension

In Claude Desktop go to Settings → Extensions and drag the file C:\CRMOne360\mcp\crmone360.mcpb into the window. Press «Install».

3. Ask

Open a new chat and ask, for example, «Which companies do I have in CRM One360?». The first time Claude asks for permission to use the extension.

Which company?

Claude works with the company you name. If you do not say which one, it looks up your companies and asks you.

Tip: The emails Claude sends appear in CRM One360 within seconds, in Sent and in their customer and ticket, if the program is open; otherwise, when you open it.

Caution: CRM One360 must be installed on the same computer as Claude Desktop (the program does not need to be open). Claude works with the same data as the program, also in multi-user installations.

8

System

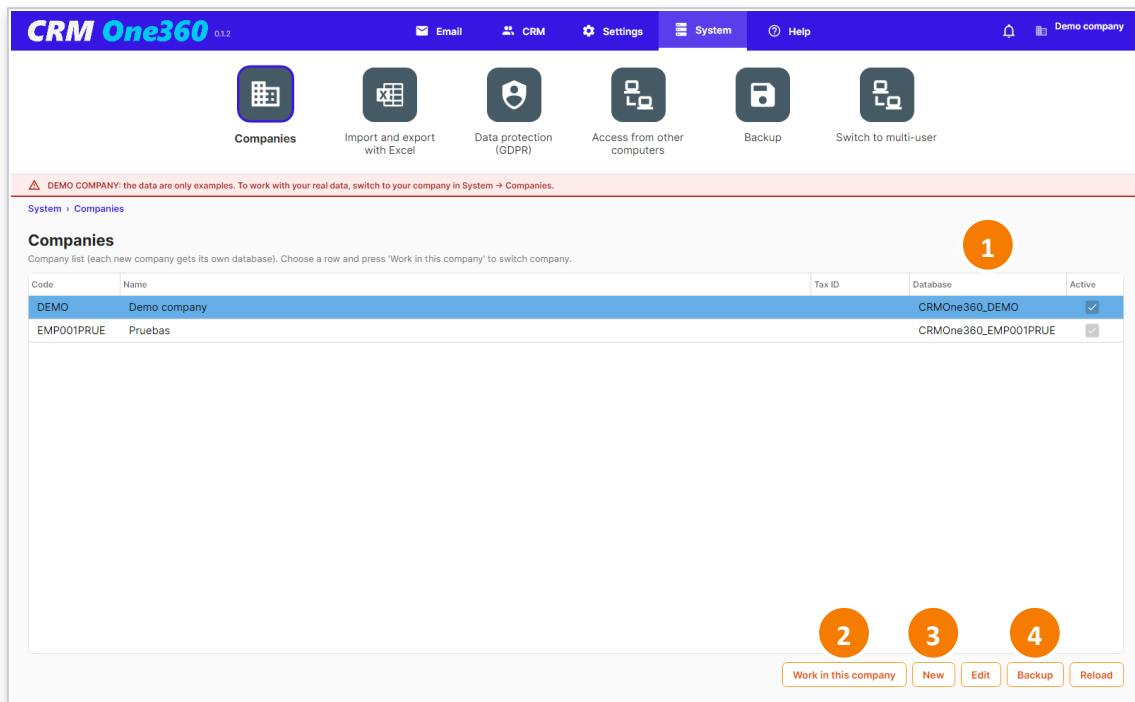
Screens for administrators: companies, Excel, data protection, backups and working from several computers.

In this chapter

- Companies
- Import and export with Excel
- Data protection (GDPR)
- Backup
- Working from several computers

Companies

Where: **System** → **Companies**



Company: DEMO

Name

Demo company

Tax ID

Code

DEMO

Database

CRMOne360_DEMO

Attachments folder

(optional)

☒ Active

Cancel

Save

Company window: name, tax ID and folder for email attachments.

What it is for

The companies of this installation. Each one has its own database: customers, emails and users are not shared between companies.

How to use it

- 1 Database of each company.
- 2 «Work in this company» switches to the selected company.
- 3 «New» creates a company; «Edit» changes its name, tax ID, attachments folder or deactivates it.
- 4 «Backup» copies the database of the selected company now.

Import and export with Excel

Where: **System** → **Import and export with Excel** · administrators only

CRM One360 0.1.2

Email CRM Settings System Help

Companies Import and export with Excel Data protection (GDPR) Access from other computers Backup Switch to multi-user

⚠ DEMO COMPANY: the data are only examples. To work with your real data, switch to your company in System → Companies.

System > Import and export with Excel

Import and export with Excel

Administrators only. Export CRM data to Excel or add customers, leads and contacts from an Excel or CSV file.

Export

1 An Excel workbook with one sheet per ticked item, with all of the company's records.

☒ Customers ☒ Contacts ☒ Leads ☒ Opportunities ☒ Tickets ☒ Tasks

2 Export to Excel...

Import

3 Do this: download the template, fill it in and choose the file. 4 Importing you will see a list of what will happen with each row: those that already exist are skipped and nothing is ever overwritten.

What to import: Customers Download template... Choose file...

Row	What happens	Name	Detail

6 Import 0 rows

What it is for

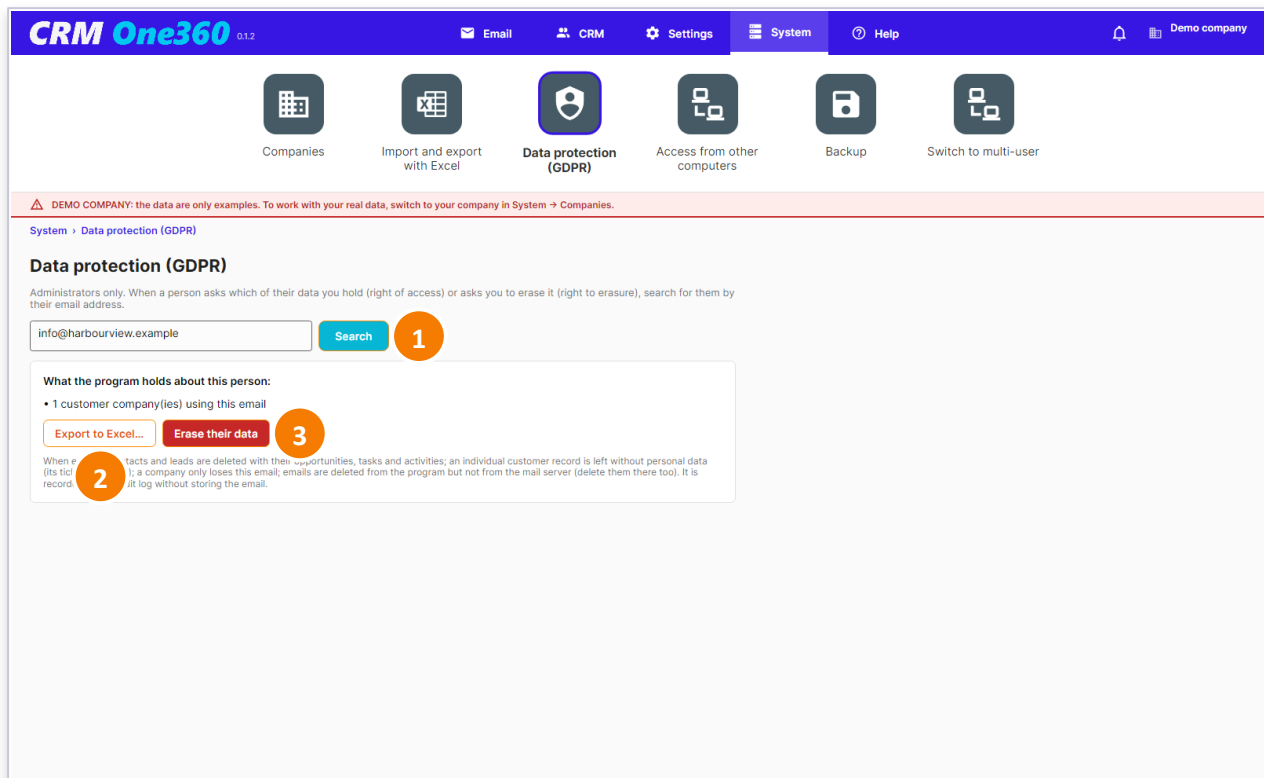
Takes your data to Excel, or brings in customers, leads and contacts from an Excel or CSV file (for example, from your previous program).

How to use it

- 1 Tick what you want to export.
- 2 «Export to Excel...» creates a workbook with one sheet for each ticked item.
- 3 To import, choose what: customers, leads or contacts.
- 4 Download the template and fill it in (one row per record).
- 5 Choose the file. The list shows what will happen with each row before anything is saved.
- 6 Press «Import» to save. Rows that already exist are skipped: nothing is ever overwritten.

Data protection (GDPR)

Where: **System** → **Data protection (GDPR)** · administrators only



What it is for

Answers the requests of people who ask what data you hold about them (right of access) or ask you to erase it (right to erasure).

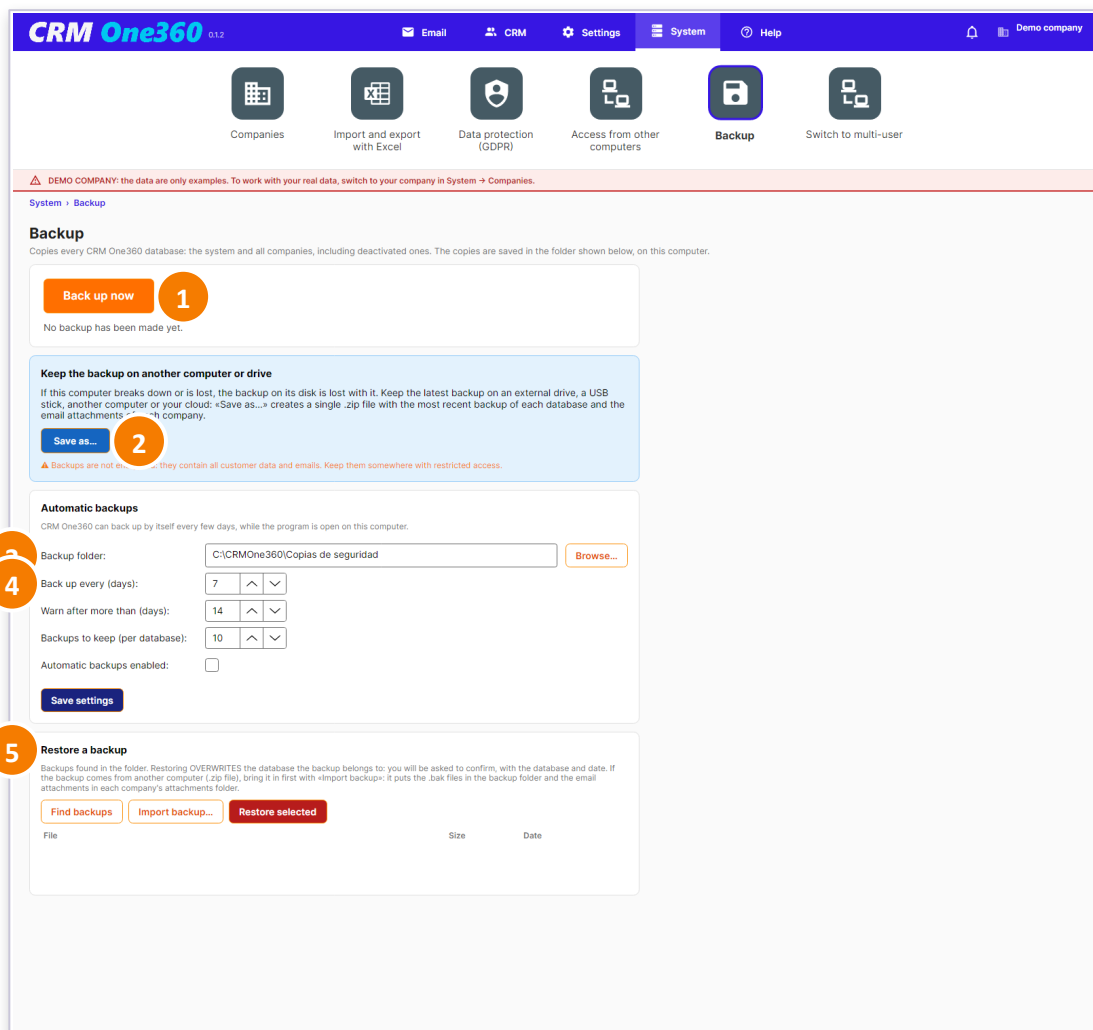
How to use it

- 1 Type the person's email address and press «Search». The program lists everything that uses that address.
- 2 «Export to Excel...» creates a file with their data, to send it to them.
- 3 «Erase their data» deletes contacts and leads with that address and its emails, and removes the address from companies. The erasure is recorded without storing the email address.

Caution: Erasing cannot be undone. Emails are deleted from the program but not from the mail server: delete them there too.

Backup

Where: **System** → **Backup**



What it is for

Copies of every CRM One360 database: the system and all companies.

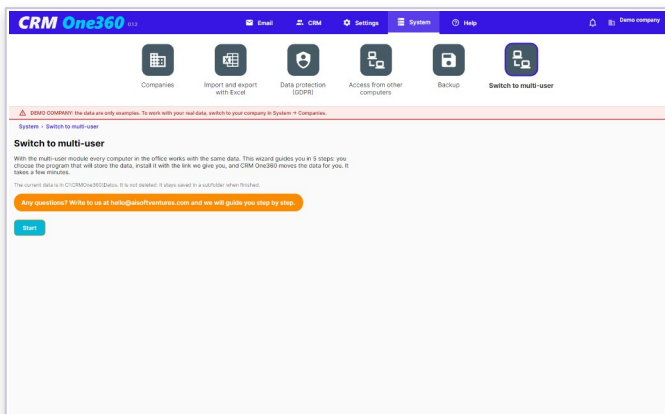
How to use it

- 1 «Back up now» makes a copy at once.
- 2 «Save as...» creates a single .zip with the latest copy of each database and the email attachments. Keep it on an external drive, a USB stick or your cloud.
- 3 Folder where copies are saved.
- 4 Automatic copies: every how many days, when to warn, and how many copies to keep.
- 5 Restore: find the copies or import a .zip and restore the one you choose.

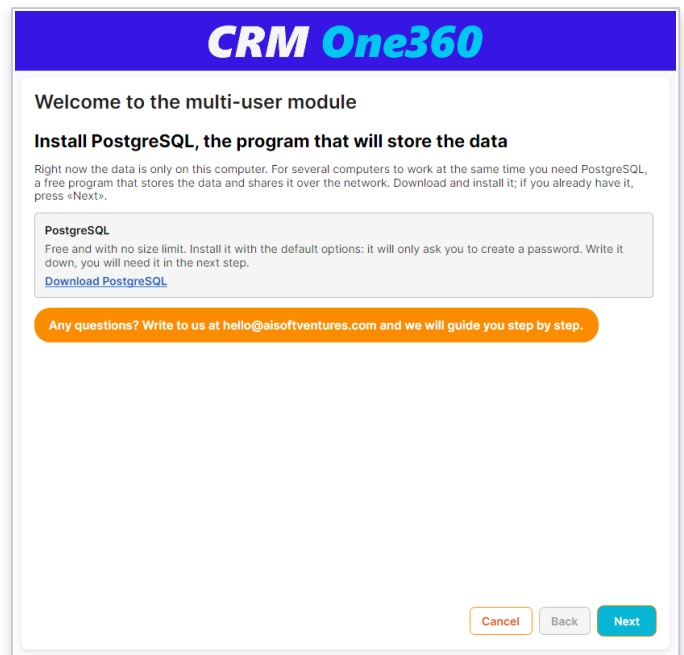
Caution: Backups are not encrypted: they contain all your customer data and emails. Keep them somewhere with restricted access.

Working from several computers

Where: **System** → **Switch to multi-user** and **System** → **Access from other computers**



Switch to multi-user: explains the change and starts the wizard.



First step of the wizard: install PostgreSQL.

What it is for

Out of the box CRM One360 keeps the data on one computer (single-user). To work from several computers the data moves to PostgreSQL, a free database program that shares it over the office network.

How to use it

- 1 In System → Switch to multi-user press «Start».
- 2 Download and install PostgreSQL with the default options; write down the password it asks you for.
- 3 Follow the wizard: CRM One360 moves your data and restarts. Your previous data is not deleted: it stays in a subfolder.
- 4 On each of the other computers install CRM One360 and, in the installation wizard, choose «No, it is already installed on another computer» (chapter 9).
- 5 System → Access from other computers checks that the main computer accepts connections and, if something is missing, shows how to fix it.

Tip: Any questions? Write to us at hello@aisoftventures.com and we will guide you step by step.

9

Installation and help

The first time you open CRM One360 a wizard prepares everything in a few steps. This chapter also explains how to contact us.

In this chapter

- The installation wizard
- One computer or several
- Adding another computer
- About and contact

The installation wizard

Where: **the first time you open CRM One360**

CRM One360

Welcome to CRM One360

Idioma / Language English

Choose the type of installation

☒ **Simple installation (Recommended)**
CRM One360 installs itself, step by step, with no technical knowledge needed.

☐ **An IT technician is going to install CRM One360**
Lets you choose the database (SQLite or PostgreSQL), the server and the administrator user.

By continuing you accept the CRM One360 terms and conditions of use.

[View terms](#)

Cancel Back Next

What it is for

Prepares CRM One360 on this computer.

How to use it

- 1 Language of the program: English or Spanish.
- 2 Simple installation: recommended. CRM One360 installs itself, step by step, with no technical knowledge needed.
- 3 IT technician: lets you choose the database (SQLite or PostgreSQL), the server and the administrator user.
- 4 By continuing you accept the terms of use; «View terms» shows them.

One computer or several

Where: **installation wizard** → **Simple installation** → **Next**

CRM One360

Welcome to CRM One360

How are you going to use CRM One360?

1 ☒ On a single computer
The data are stored on this computer. Nothing else needs to be installed.

2 ☐ On several computers in the office
Everyone works with the same data over the network. It needs PostgreSQL (free) installed on one of the computers.

Create a password to sign in to CRM One360
Choose a new password. It is not your Windows password: it is the one you will use to sign in to the program as user 'admin'. At least 8 characters, with at least one digit or symbol. Write it down: you will also need it if you install CRM One360 on other computers.

3 New password

Repeat password

4 Your company name

Your company is created with this name, plus a 'DEMO' company with sample data to practise with. If you leave it empty you can create your company later in System → Companies.

Cancel Back Next

What it is for

Choose how you are going to use the program and create your password.

How to use it

- 1 On a single computer: the data stays on this computer. Nothing else needs to be installed.
- 2 On several computers: everyone works with the same data over the network. It needs PostgreSQL (free) on one of the computers.
- 3 Create the password of the user «admin», twice. At least 8 characters, with a digit or symbol. Write it down.
- 4 Type the name of your company. The program creates it, plus the DEMO company with sample data. Press «Next» and the program opens.

Caution: This password is not your Windows password. You will need it to sign in and to install CRM One360 on other computers.

Adding another computer

Where: **installation wizard** → **On several computers**

CRM One360

Welcome to the CRM One360 multi-user module

Is this the first installation of CRM One360 in your company?

☒ **Yes, it is the first**
This computer will hold the data and the others will connect to it.

☐ **No, it is already installed on another computer**
This computer will connect to the one that already holds the data.

Any questions? Write to us at hello@aisoftwareventures.com and we will help you install the multi-user module.

Cancel Back Next

Is this the first installation in your company?

CRM One360

Welcome to the CRM One360 multi-user module

Connect to the other computer

Click 'Detect network' to see the computer that holds your CRM One360 data, and make sure both computers are connected to the same Wi-Fi network.

Detect network

Computer

If it does not appear, type the name or IP of the other computer

For example OFFICE-PC or 192.168.1.20

Enter your CRM One360 password

Cancel Back Connect

Connect to the computer that holds the data.

What it is for

On the second and the following computers CRM One360 connects to the computer that already holds the data.

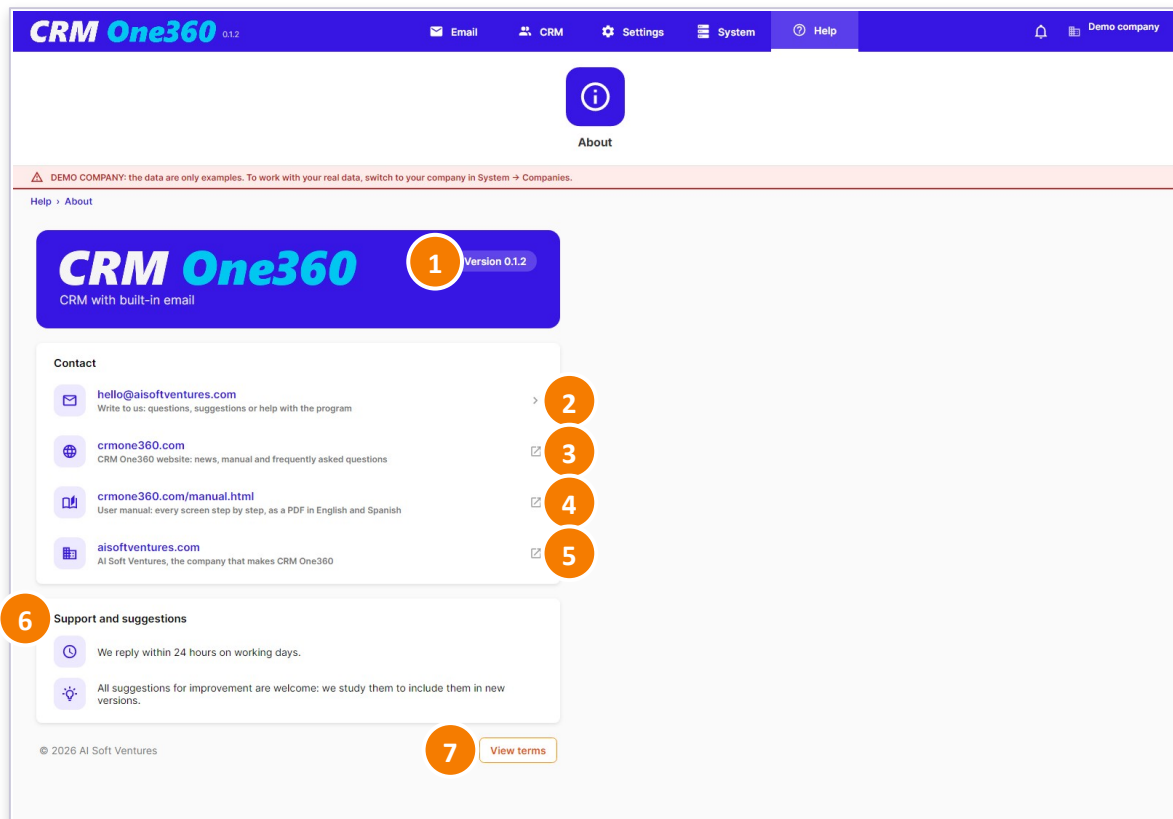
How to use it

- 1 Choose «No, it is already installed on another computer».
- 2 Press «Detect network» and choose the computer that holds the data. If it does not appear, type its name or IP address.
- 3 Type your CRM One360 password and press «Connect».

Tip: Both computers must be on the same network. If they cannot connect, open System → Access from other computers on the main computer.

About and contact

Where: **Help** → **About**



What it is for

The version of CRM One360 you have installed and how to contact us.

How to use it

- 1 Version: mention it when you write to us.
- 2 Email: opens a new email to hello@aisoftventures.com from your own account in CRM One360.
- 3 crmone360.com: the program's website, with news, this manual and frequently asked questions.
- 4 crmone360.com/manual.html: the page of this manual on the website, to download the latest version as a PDF in English or Spanish.
- 5 aisoftventures.com: the website of AI Soft Ventures, the company that makes CRM One360.
- 6 Support and suggestions: we reply within 24 hours on working days, and every suggestion for improvement is welcome and studied for new versions.
- 7 «View terms» shows the terms and conditions of use.