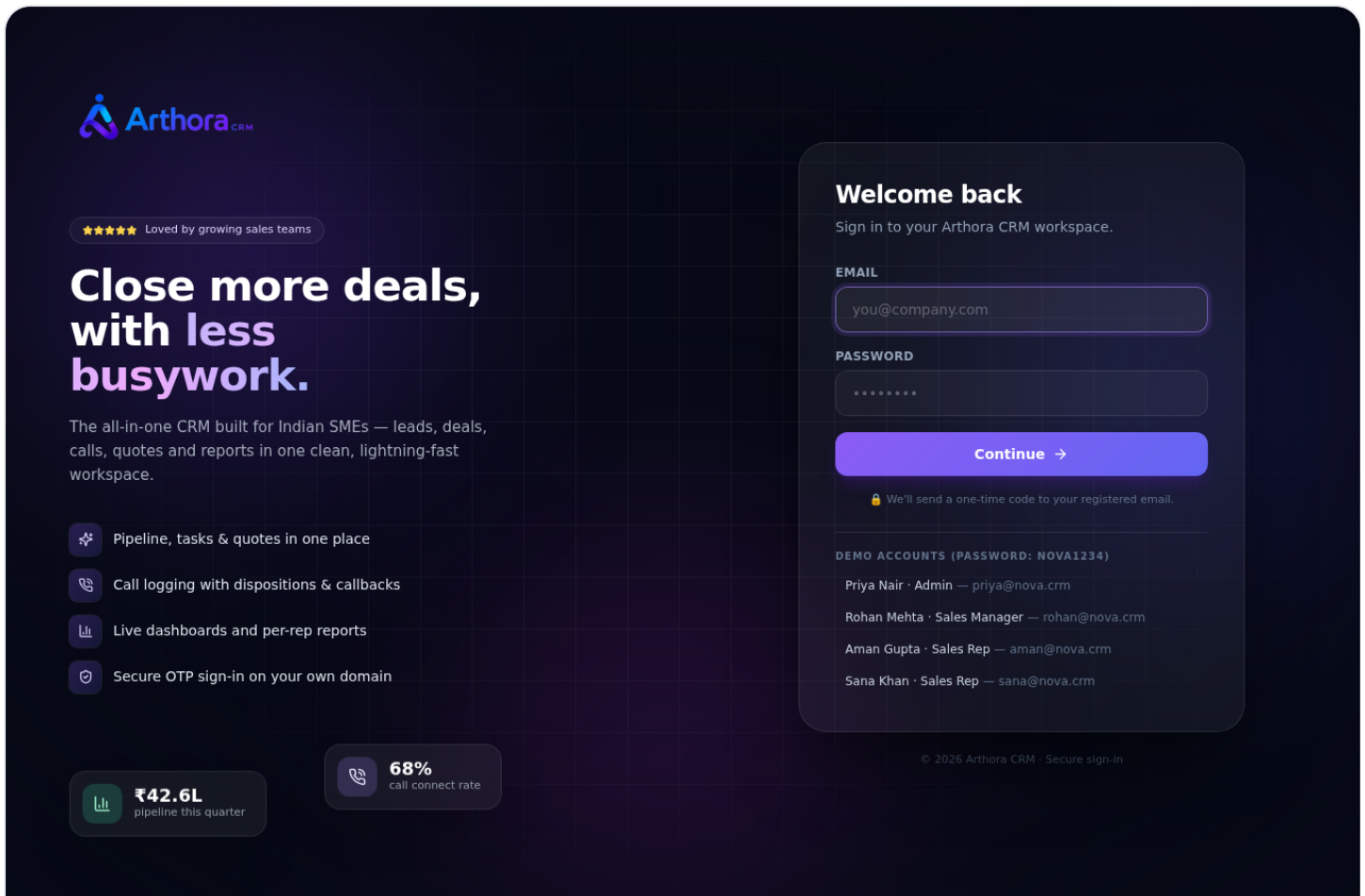


Arthora CRM — User Manual

Yeh guide aapko Arthora CRM ke har feature ka step-by-step istemaal sikhaati hai — screenshots ke saath. Shuru karne ke liye bas ek browser chahiye: **crm.arthora.in**

1 Login & shuruaat

1. **crm.arthora.in** kholo aur apna **email + password** daalo (trial liya hai to signup screen par diya gaya password use karo).
2. **Continue** dabao — aapke email par ek **6-digit OTP** aayega.
3. OTP daal kar **Verify & sign in** dabao.



Login screen — email + password, phir OTP

💡 Email na mile to Spam/Junk folder check karein, phir “Resend code” dabayein. Password bhool gaye? Login screen par **Forgot password?** dabao — email par reset link aa jayegi (1 ghanta valid).

2 Home dashboard

Login ke baad Home par aapke din ka poora snapshot milta hai:

- **Open Leads, Pipeline Value, Win Rate, Tasks Due** — upar ke 4 cards
- **My Open Tasks** aur **My Meetings** — aaj ka kaam
- **My Deals Closing This Month** — value ke saath
- Upar right me **refresh** aur view customize karne ka dropdown

ArthoraCRM SME EDITION

Home

Calendar Reports

MODULES

Search

SALES

Leads Contacts Accounts Deals Documents Campaigns

ACTIVITIES

Tasks Meetings Calls Visits

INVENTORY

Products Quotes Sales Orders Purchase Orders

Home

Q Search leads, tasks, contacts...

+ Add lead

PN Priya

Welcome Priya Nair

Priya's Home

OPEN LEADS 12

PIPELINE VALUE ₹10,65,000

WIN RATE 50%

TASKS DUE 4

My Open Tasks

SUBJECT	DUE DATE	STATUS
Call new Bhopal lead	2026-07-12	Open
Kickoff call	2026-07-15	Open
Product demo over video call	2026-07-01	Open
Follow up on revised quote	2026-07-02	Open

Total Records 4

My Meetings

TITLE	RELATED TO	WHEN
Kickoff call	CSV Two	15 Jul 2026, 10:00 am - 11:30 am
Product demo over video call	Greenleaf Organics	2026-07-01

Total Records 2

Today's Leads

No Leads created today.

Total Records 0

My Deals Closing This Month

DEAL	STAGE	AMOUNT
Rangoni Of Florence	Contacted	₹2,00,000
Test Create Co	Contacted	₹1,20,000
Greenleaf Organics	Contacted	₹95,000
Sharma Textiles	Proposal	₹2,40,000

Total Records 4

Saar Help

Home dashboard

3 Leads

Naya lead banana

1. Sidebar me **Sales → Leads** kholo.
2. Right upar **Create Lead** dabao — poora detailed form khulega (naam, company, phone, email, source, status, address...).
3. Details bhar kar **Save** karo.

Create Lead form

List ke powerful tools

- **Filter** button — system filters (Touched/Untouched, Converted...) + field filters
- **Search**, column sort, aur **checkbox se bulk actions** (status change, delete, email)
- **Create Lead ke bagal wale caret** se **CSV Import** — purane leads minutes me le aao
- **Export CSV** — filtered list download

ArthoraCRM
SME EDITION

Home
Calendar
Reports

MODULES

Search

SALES

Leads

Contacts

Accounts

Deals

Documents

Campaigns

ACTIVITIES

Tasks

Meetings

Calls

Visits

INVENTORY

Products

Quotes

Sales Orders

Purchase Orders

Leads

Search leads, tasks, contacts...

+ Add lead

PH Priya

All Leads (14)

Filter

Columns

Import

Export CSV

Create Lead

☐	LEAD NAME	COMPANY	EMAIL	PHONE	OWNER	SOURCE	
☐	Christopher Maclead VP Sales · Indore	Rangoni Of Florence	chris@rangoni.in	555-555-5555	Test Rep	Cold Call	☐ Open >
☐	Bhopal Test Co Bhopal	Bhopal Test Co	-	-	Aman Gupta	Manual	☐ Open >
☐	CSV Two Stale CSV Two	CSV Two	a@b.c	-	Test Rep	Import	☐ Open >
☐	CSV One Stale Delhi	CSV One	-	-	Test Rep	Import	☐ Open >
☐	Public Form Co Stale Jaipur	Public Form Co	pf@co.in	-	Test Rep	Web	☐ Open >
☐	Addr Test Stale Addr Test	Addr Test	x@y.in	-	Rohan Mehta	Manual	☐ Open >
☐	Zenith Traders Stale Zenith Traders	Zenith Traders	sales@zenith.in	+91 98765 43210	Rohan Mehta	Manual	☐ Open >
☐	Test Create Co Stale Indore	Test Create Co	a@b.in	+91 90000 00000	Rohan Mehta	Referral	☐ Open >
☐	Test Traders Stale Delhi	Test Traders	-	-	Rohan Mehta	Manual	☐ Open >
☐	Kisan Agro Tools Nagpur	Kisan Agro Tools	sales@kisanagro.in	+91 88888 23410	Sana Khan	Referral	☐ Open >

Saar Help

Leads list — filters, bulk-select, import/export

4 Lead ka detail page

Kisi bhi lead ke naam par click karo — poora record khulta hai:

- **Overview** — saari fields; **Lead Status** yahin se badlo
- **Timeline** — har call, note, email, status change ka record
- Left me **Related Lists** — Notes, Attachments, Quotes, Sales Orders, Activities, Emails...
- Upar **Send Email** (asli email jaati hai), **Convert** (deal banao) aur **Edit**

ArthoraCRM SME EDITION

Home, Calendar, Reports, MODULES, Search, SALES, Leads, Contacts, Accounts, Deals, Documents, Campaigns, ACTIVITIES, Tasks, Meetings, Calls, Visits, INVENTORY, Products, Quotes, Sales Orders, Purchase Orders

Leads Search leads, tasks, contacts... + Add lead PM Priya

All Leads (14) Filter Columns Import Export CSV + Create Lead

1 selected Move to stage... Mass update... Email Delete Clear

LEAD NAME	COMPANY	EMAIL	PHONE	OWNER	SOURCE	
☒ Christopher Maclead VP Sales - Indore	Rangoni Of Florence	chris@rangoni.in	555-555-5555	Test Rep	Cold Call	Open >
☐ Bhopal Test Co Bhopal	Bhopal Test Co	-	-	Aman Gupta	Manual	Open >
☐ CSV Two Stale CSV Two	CSV Two	a@b.c	-	Test Rep	Import	Open >
☐ CSV One Stale Delhi	CSV One	-	-	Test Rep	Import	Open >
☐ Public Form Co Stale Jaipur	Public Form Co	pf@co.in	-	Test Rep	Web	Open >
☐ Addr Test Stale Addr Test	Addr Test	x@y.in	-	Rohan Mehta	Manual	Open >
☐ Zenith Traders Stale Zenith Traders	Zenith Traders	sales@zenith.in	+91 98765 43210	Rohan Mehta	Manual	Open >
☐ Test Create Co Stale Indore	Test Create Co	a@b.in	+91 90000 00000	Rohan Mehta	Referral	Open >
☐ Test Traders Stale Delhi	Test Traders	-	-	Rohan Mehta	Manual	Open >

Saar Help

Lead detail — overview + related lists

5 Deals (pipeline)

1. **Sales → Deals** kholo — Kanban board dikhega: New → Contacted → Proposal → Won / Lost.
2. Deal ke card ko **drag karke** agle stage me daalo — bas itna hi.
3. **Board / List** toggle se table view; **Filter** aur search bhi hai.
4. Har column ke neeche us stage ki **total value** dikhti hai.

ArthoraCRM SME EDITION

Home, Calendar, Reports, MODULES, SALES, Leads, Contacts, Accounts, Deals, Documents, Campaigns, ACTIVITIES, Tasks, Meetings, Calls, Visits, INVENTORY, Products, Quotes, Sales Orders, Purchase Orders

Deals (14) ₹11,25,000 Board List Filter Search deals... Export CSV + Create Deal

New	Contacted	Proposal	Won	Lost
Bhopal Test Co Bhopal 10 Cold ₹2,00,000	Rangoni Of Florence Indore 70 Hot ₹2,00,000	Sharma Textiles Surat 90 Hot ₹2,40,000	Apex Logistics Pvt Ltd Mumbai 45 Warm ₹4,10,000	Kisan Agro Tools Nagpur 70 Hot ₹60,000
CSV Two - 30 Cold	Test Create Co Indore 60 Warm ₹1,20,000			
CSV One Delhi 0 Cold	Greenleaf Organics Pune 90 Hot ₹95,000			
Public Form Co Jaipur 20 Cold				
Addr Test - 20 Cold				
Zenith Traders - 35 Cold				
Test Traders Delhi 0 Cold				
Dawn Interiors Bengaluru 10 Cold				
₹4,15,000	₹2,40,000	₹4,10,000	₹60,000	

Drag a card between columns to change its stage. Moving to Proposal auto-creates a follow-up if that rule is on.

Saar Help

Deals board — drag & drop stages

6 Calls

1. **Activities** → **Calls** kholo.
2. **Log Call** dabao — lead chuno, direction (Outbound/Inbound), **outcome** (Connected, Callback, Interested...), duration aur notes bharo.
3. Outcome **Callback** chuno to date-time set karo — woh aapke tasks me aa jayega.
4. Upar cards me **connect rate**, **total talk-time** jaisi summary milti hai.

- Home
- Calendar
- Reports
- MODULES
- SALES
 - Leads
 - Contacts
 - Accounts
 - Deals
 - Documents
 - Campaigns
- ACTIVITIES
 - Tasks
 - Meetings
 - Calls**
 - Visits
- INVENTORY
 - Products
 - Quotes
 - Sales Orders
 - Purchase Orders

Calls

Q Search leads, tasks, contacts...

+ Add lead

PN Priya

Calls
 Log calls, track dispositions and schedule callbacks.

+ Log call

CALLS TODAY
0
 9 total

CONNECT RATE
33%
 3 connected

CALLBACKS DUE
3
 scheduled

TALK TIME
26:50
 total mm:ss

Q Search lead, purpose, notes...

All directions

All outcomes

All reps

LEAD	DIRECTION	OUTCOME	DURATION	NOTES	OWNER	WHEN
Greenleaf Organics	Outbound	Callback 20 Jul, 11:00 am	1:00	Demo scheduling: Busy no...	Aman Gupta	19 Jul, 04:40 pm
Dawn Interiors	Outbound	Callback 21 Jul, 03:30 pm	2:10	Follow-up: Requested a call...	Aman Gupta	19 Jul, 02:00 pm
Apex Logistics Pvt Ltd	Outbound	Converted	8:40	Closing: Agreed to proceed...	Sana Khan	19 Jul, 12:15 pm
Bhopal Test Co	Outbound	Callback 20 Jul, 11:00 am	2:30	Follow-up: Wants a callback...	Aman Gupta	19 Jul, 08:25 am
Sharma Textiles	Outbound	No Answer	—	Follow-up: No answer, will r...	Aman Gupta	18 Jul, 03:05 pm
Greenleaf Organics	Inbound	Interested	6:50	Inbound query: Asked abou...	Aman Gupta	18 Jul, 10:10 am
Dawn Interiors	Missed	No Answer	—	Missed call, returned later.	Aman Gupta	18 Jul, 09:30 am
Sharma Textiles	Outbound	Connected	4:05	Discovery: Discussed requir...	Aman Gupta	17 Jul, am

Saar Help

Call management — dispositions aur callbacks

7 Quotes & invoices

1. Pehle **Inventory** → **Products** me apne products daalo (naam, price, tax%).
2. **Inventory** → **Quotes** → **New quote** — customer chuno, products add karo, discount daalo.
3. Quote ke **View** se professional document khulta hai — type badlo (**Quotation / Invoice / Agreement**) aur **Print / Save PDF** karo.
4. Search aur type/status **filters** upar hain; har quote card par item · qty · rate dikhta hai.

ArthoraCRM SME EDITION

Quotes

Q Search leads, tasks, contacts...

+ Add lead

PN Priya

Quotes & invoices

Build a quote from products, then print or save it as PDF. **1 awaiting approval.**

+ New quote

Q Search party or quote no...

All types

All statuses

3 of 3

QMRGKPxLM DRAFT

Sharma Textiles

Starter Package Qty 2 × ₹15,000

1 item(s) · 2026-07-11

₹35,400 incl. tax

₹30,000

View

QMRDQA9LC DRAFT NEEDS APPROVAL

Test Traders

Starter Package Qty 1 × ₹15,000

1 item(s) · 2026-07-09 · discount ₹5,000

₹15,000

Approve Reject

₹12,700 incl. tax

View

Q1 SENT

Sharma Textiles

Growth Package Qty 1 × ₹45,000

Onboarding & Setup Qty 1 × ₹10,000

2 item(s) · 2026-07-09 · discount ₹5,000

₹59,900 incl. tax

₹45,000

₹10,000

View

Saar Help

Quotes list — filters ke saath

8 Sales Orders (GST invoice)

1. **Inventory → Sales Orders → New order.**
2. Party chuno (Title apne aap bhar jata hai), **tax type** chuno — Intra-state (CGST+SGST) ya Inter-state (IGST).
3. Line items daalo — **Item, Qty, Rate, GST%** — total live calculate hota hai.
4. **Bank details** (account, IFSC, branch) bhi order par save hote hain.
5. List me **Invoice** dabao — GST breakdown, amount-in-words aur bank details ke saath **TAX INVOICE** — Print/PDF karo.
6. **Pay** se payment record karo — **received date + UTR number** ke saath; outstanding apne aap ghatta hai.

Arthora Technologies
12 MG Road, Jaipur, Jaipur
+91 92515 41185 · crm@arthora.in
GSTIN: 08ABCDE1234F1Z5

TAX INVOICE
S0-0000
Date: 21 July 2026
Confirmed

BILL TO
Rangoni Of Florence
Indore
555-555-5555 · chris@rangoni.in

#	ITEM	QTY	RATE	GST%	AMOUNT
1	Annual License	1	₹1,00,000	18%	₹1,00,000
2	Onboarding	1	₹20,000	18%	₹20,000
Subtotal					₹1,20,000
CGST					₹10,800
SGST					₹10,800
Grand Total					₹1,41,600

Amount in words: One Lakh Forty One Thousand Six Hundred Rupees only

BANK DETAILS
A/c Name: Arthora Technologies
Bank: ICICI Bank
A/c No: XXXXXXXX0000
IFSC: ICIC0000000
Branch: Jaipur

Arthora Technologies
Authorised signatory

GST tax invoice — CGST/SGST, bank details, amount in words

9 Purchase Orders

Vendors se khareedne ke liye — Sales Orders jaisa hi, bas ulta:

1. **Inventory → Purchase Orders → New purchase order.**
2. **Vendor/Supplier** chuno, GST items daalo, bank details bharo.
3. Document **PURCHASE ORDER** title ke saath banta hai (PO-0001 numbering); payments UTR ke saath track karo.
4. Status: Draft → Ordered → Received.

The screenshot displays the 'Purchase Orders' module in ArthoraCRM. The left sidebar contains navigation options: Home, Calendar, Reports, MODULES (with a search bar), SALES (Leads, Contacts, Accounts, Deals, Documents, Campaigns), ACTIVITIES (Tasks, Meetings, Calls, Visits), INVENTORY (Products, Quotes, Sales Orders), and Purchase Orders (selected). The main header shows 'Purchase Orders' with a search bar and user profile 'Priya'. Below the header, a summary section shows 'Purchase orders' with a subtitle 'Vendor purchase orders, GST bills and payment tracking.' and a '+ New purchase order' button. Four summary cards are displayed: ORDERS (0), TOTAL BILLED (₹0), COLLECTED (₹0), and OUTSTANDING (₹0). A table with columns: ORDER #, ACCOUNT, CITY, DATE, STATUS, ITEMS, AMOUNT, PAID, OUTSTANDING, and ACTIONS is shown below. The table content area states 'No purchase orders yet. Create one for a vendor.' A 'Saar Help' button is located at the bottom right. A footer bar at the bottom of the interface reads 'Purchase orders module'.

10 Documents drive

1. **Sales → Documents** kholo — do tabs: **Files & Folders** aur **Quotes & Invoices**.
2. Files tab me **New → New Folder / Upload File** — apni files (25 MB tak) store karo.
3. **Team Folders** ke **+** se team folder banao (Admin/Editor/Viewer roles ke saath).
4. Kisi bhi file par hover karke **⋮** se Download / Rename / Delete.
5. Quotes & Invoices tab me saare documents party-name ke saath — View, PDF aur filters.

ArthoraCRM SME EDITION

Home Calendar Reports

MODULES

Search

SALES

- Leads
- Contacts
- Accounts
- Deals
- Documents**
- Campaigns

ACTIVITIES

- Tasks
- Meetings
- Calls
- Visits

INVENTORY

- Products
- Quotes
- Sales Orders
- Purchase Orders

Documents Search leads, tasks, contacts...

Documents Files & Folders Quotes & Invoices

My Folders + New

NAME	LAST MODIFIED
My Contracts Created by Priya Nair	1 days ago by Priya Nair

Saar Help

WorkDrive-style documents drive

11 Reports

1. Sidebar me **Reports** kholo — upar live **dashboard** (pipeline, forecast, win rate) hai jo **Customize** se set hota hai.
2. Neeche **13+ ready reports** — Revenue Forecast, Pipeline by Stage, Win/Loss, Call Performance by Rep...
3. Kisi report par click karo — **date range filter** aur **Print / Save PDF** milta hai.
4. List ko columns par sort karo aur **Export CSV** karo; **Email digest** se summary mail bhejo.

ArthoraCRM SME EDITION

Home Calendar **Reports**

MODULES

SALES

- Leads
- Contacts
- Accounts
- Deals
- Documents
- Campaigns

ACTIVITIES

- Tasks
- Meetings
- Calls
- Visits

INVENTORY

- Products
- Quotes
- Sales Orders
- Purchase Orders

Reports

Search leads, tasks, contacts...

+ Add lead PH Priya

Dashboard Email digest Customize

OPEN LEADS 12

PIPELINE VALUE ₹10,65,000

% WEIGHTED FORECAST ₹6,78,500

COMMITTED (WON) ₹4,10,000

WIN RATE 50%

PIPELINE BY STAGE

Stage	Value
New	₹0
Contacted	₹4,15,000
Proposal	₹2,40,000
Won	₹4,10,000
Lost	₹00,000

LEADS BY SOURCE

Source	Count
Manual	4
Web	3
Referral	3
Import	2
Cold Call	1
Outbound	1

All Reports 13 reports

From to To Export CSV

Search All Reports

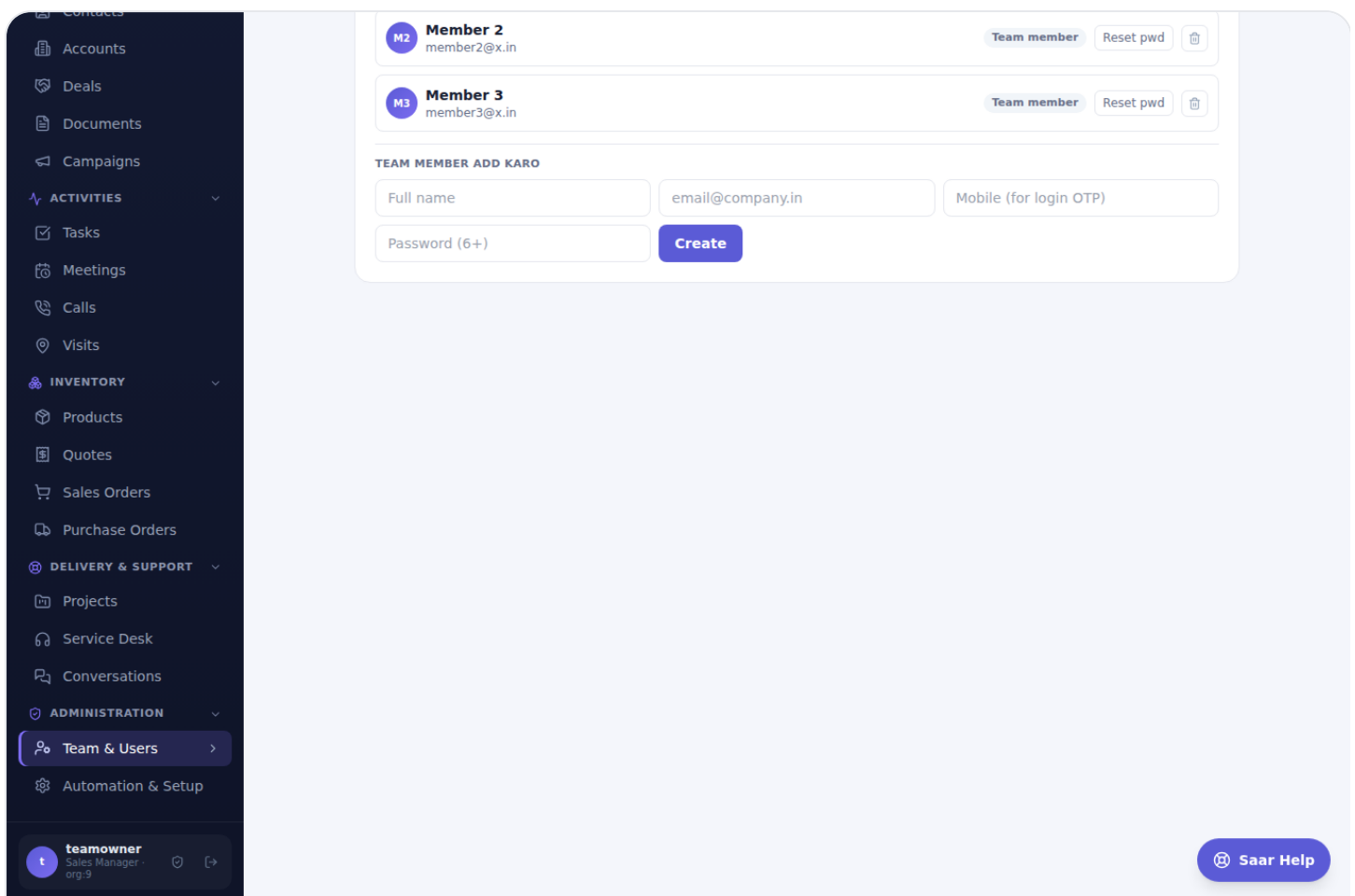
REPORT NAME	DESCRIPTION	FOLDER	LAST ACCESSED DATE	CREATED BY
Accounts by Industry	Accounts grouped by industry	Account and Contact Reports	-	Arthora System
Activity Mix	Meetings, calls and emails logged	Activity Reports	-	Arthora System
Call Performance by Rep	Calls, connect rate, callbacks and talk time per rep	Activity Reports	-	Arthora System
Contacts by Stage	Reachable contacts (with email or phone) per stage	Account and Contact Reports	-	Arthora
Deals Closing This	Open deals with value, largest first	Deal Reports	-	Arthora

Saar Help

Reports hub — dashboard + 13 reports

12 Team & Users

1. **Administration → Team & Users** kholo.
2. Plan owner ho to simple form milta hai — member ka **naam, email, mobile, password** daalo aur **Create** dabao. Member apne email/password + OTP se login karega.
3. Aapke **plan ki user limit** tak hi members ban sakte hain (Starter 5 · Growth 15 · Enterprise unlimited — aap bhi count hote ho). Upar seats counter dikhta hai, jaise **3 / 5 users**.
4. Team ka data aapas me share hota hai: aapko poori team ke leads dikhte hain, members ko apne. Orders, quotes aur documents team me share rehte hain.
5. **Reset pwd** se member ka password badlo; 🗑️ se remove karo — uske records aapko mil jate hain.
6. Har member ka **target** set karo — Target Attainment report me progress dikhega.

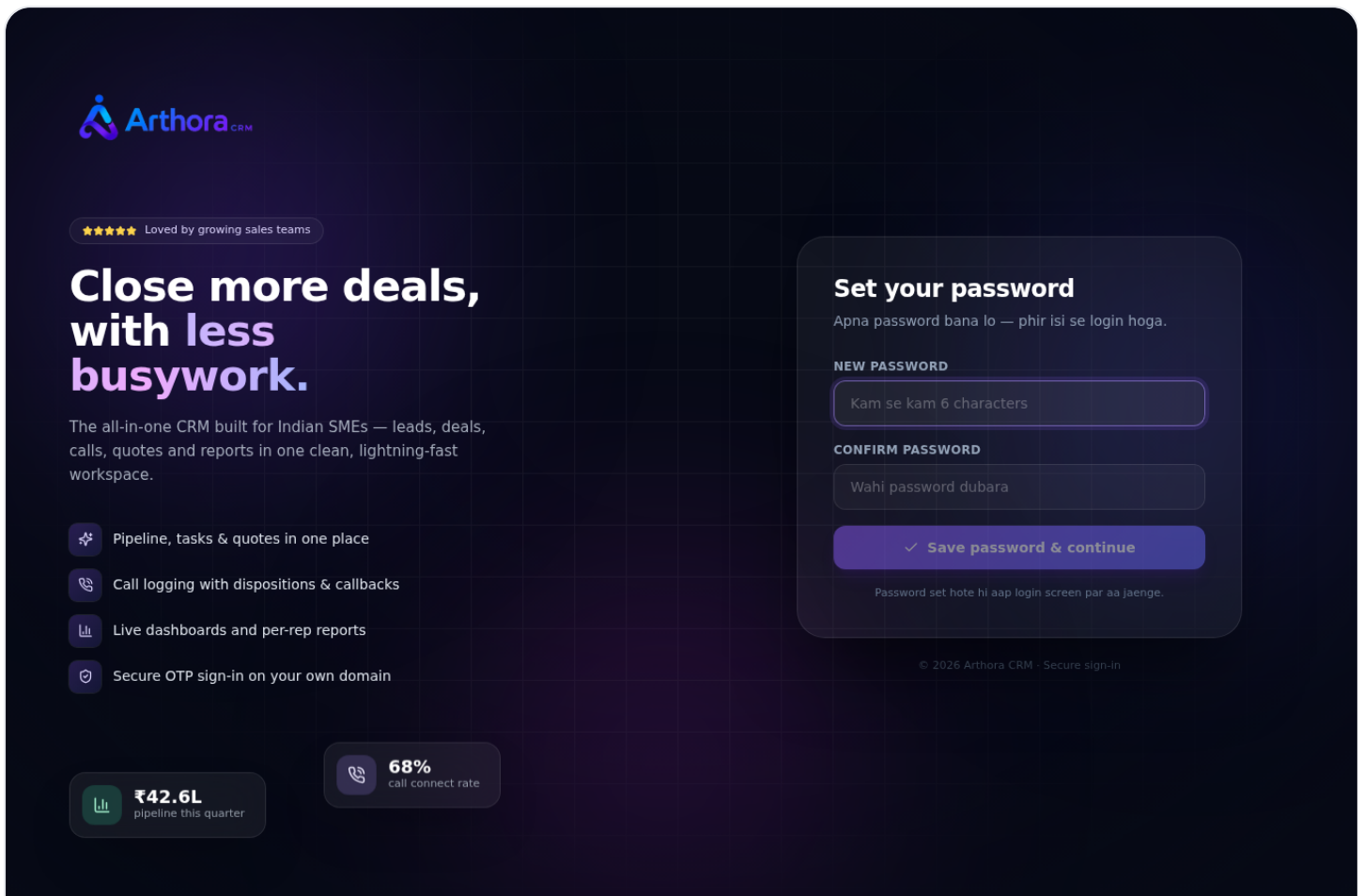


Team & Users — members list aur "Team member add karo" form

⚙️ **Automation & Setup** me company profile (GST, bank — invoices par chhapta hai), Subscription/License card, email integration, custom fields, categories aur audit log milta hai.

13 Plans, trial & billing

- **7-din ka free trial:** arthora.in se instant account milta hai — upar amber chip me bache hue din dikhte hain. Trial khatam hone par account **lock** ho jata hai, data delete nahi hota.
- **Plan kharidna pooraa automatic hai:** [arthora.in par payment karo](#) (Starter ₹6,999 · Growth ₹11,999 · Enterprise ₹30,999 per year) — payment hote hi aapka account ban jata hai aur email par **password set karne ki link** aati hai.
- Link kholte hi neeche wali screen milti hai — password banao aur seedha login karo. Na koi key daalni hai, na kisi ka wait karna hai.
- Plan **1 saal** chalta hai. Aakhri 30 din me upar renew ki yaad dilane wala chip dikhta hai; dubara payment karte hi validity 1 saal aur badh jati hai — poori team ke liye.
- Trial user ne payment kiya to wahi account turant paid ban jata hai — data wahi rehta hai.
- Madad chahiye? [WhatsApp 92515 41185](#) ya crm@arthora.in



Payment ke baad email link se — Set your password screen

👏 App ke andar bhi madad hai — right-bottom me **Saar Help** button har feature ka jawab deta hai.