User Guide

V2.X - November 2016

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INTRODUCTION - WHAT IS UPICRM AND HOW DOES IT WORK?

UpiCRM is the simplest, most elegant and easy to use CRM & Lead management solution, designed for WordPress users.

UpiCRM is designed to easily integrate with your WordPress website and works in parallel with existing solutions you are currently using, such as existing contact forms (Contact Form7, Gravity Forms, and any other contact forms you are currently using in order to collect leads from your website).

UpiCRM method of operation is as follows:

- **Elegant, Non-Intrusive, and Easy to Set Up:**
  UpiCRM maps your existing database/forms of leads from your current website, by using an advanced yet elegantly simple, semi-automatic mechanism, in order to create a new single, central, unified database of all your leads, while importing all past data from contact forms databases (if existing).

- **Complete Customer Lifecycle Management:**
  The UpiCRM unified leads database offers new capabilities for managing the lifecycle of all leads, from receiving a new lead and routing it to the designated person, through managing the process required per lead, and up to the closing of the process with each lead.

- **Teamwork & Collaboration:**
  UpiCRM provides the means for the most efficient teamwork, by allowing new leads to be assigned to any designated member of your team serving any function – sales, marketing, executives, and service providers.

- **Analytics, Monitoring and Tracking:**
  UpiCRM offers advanced capabilities of effectiveness monitoring and analysis, by attaching the traffic source to each and every lead, as well as utilizing the URL tagging mechanism, in order to allow you to gather, report, and analyze your marketing activities, starting right from the investment in a marketing channel.

- **Dashboards and KPI's (Key Performance Indicators):**
  Gain instant knowledge of your current funnel and status with the UpiCRM dashboard.
  No more endless spreadsheets, manual reports or confused and angry managers. Simply provide your executive team with an easy access to the real-time, easy to understand UpiCRM dashboard.

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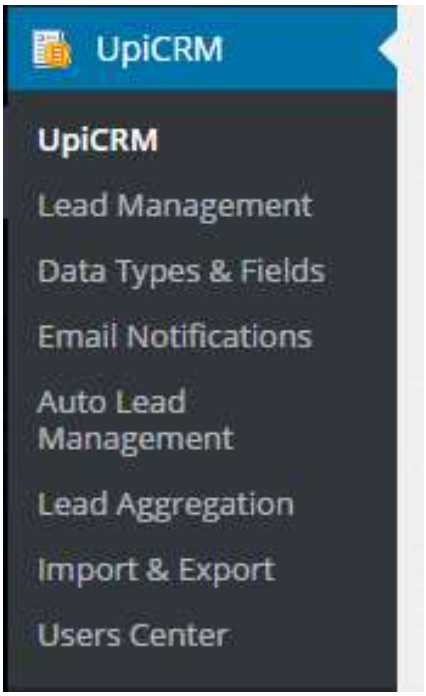
UPICRM ADMINISTRATOR'S MENU

After installation and activation of the UPICRM plugin, the "UpiCRM" menu item will appear in the WordPress main Dashboard menu. When you click on it the following submenu will appear:



Clicking on any of the submenu items will open the chosen screen as follows:

UPICRM Dashboard

Depending on the logged-in user's role, UpiCRM presents one of two dashboards:

- Admin Dashboard: Presents all leads' status and analytics data.
- User dashboard: Presents the same information, but only for the leads assigned to the logged-in user.

As this window contains a lot of information, each part will be discussed in detail below, from top to bottom.

UPICRM Dashboard top section

This section contains some quick information and frequently used links.

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Latest New Leads: preview of the few most recently received leads.

Manage Leads: a quick link to the “Lead Management” section

Export to Excel: a quick link to export UpiCRM’s lead data to an Excel file.

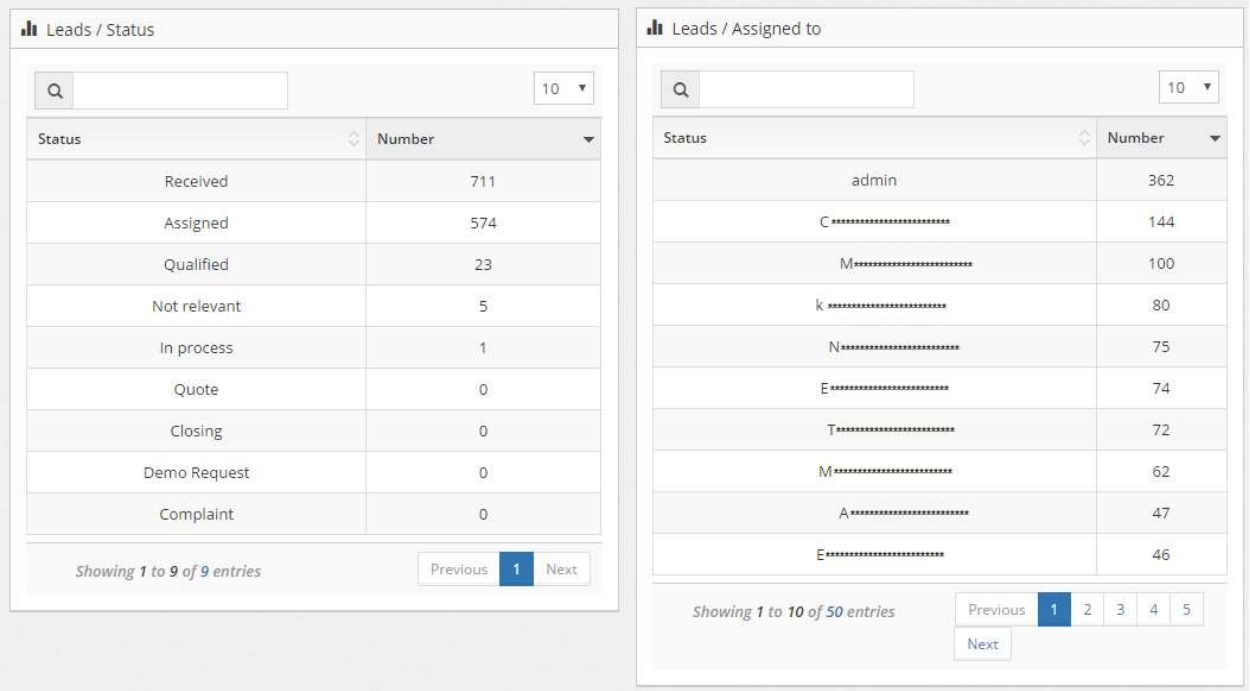
Lead Overview section

This section contains a graph representation of the number of leads accumulated in UPiCRM.

Lead By… section

This section contains a representation of leads totals as sorted by 5 parameters. The parameters are 5 useful fields in the UpiCRM database:

- Status
- Assigned to
- Country
- Product
- Received From



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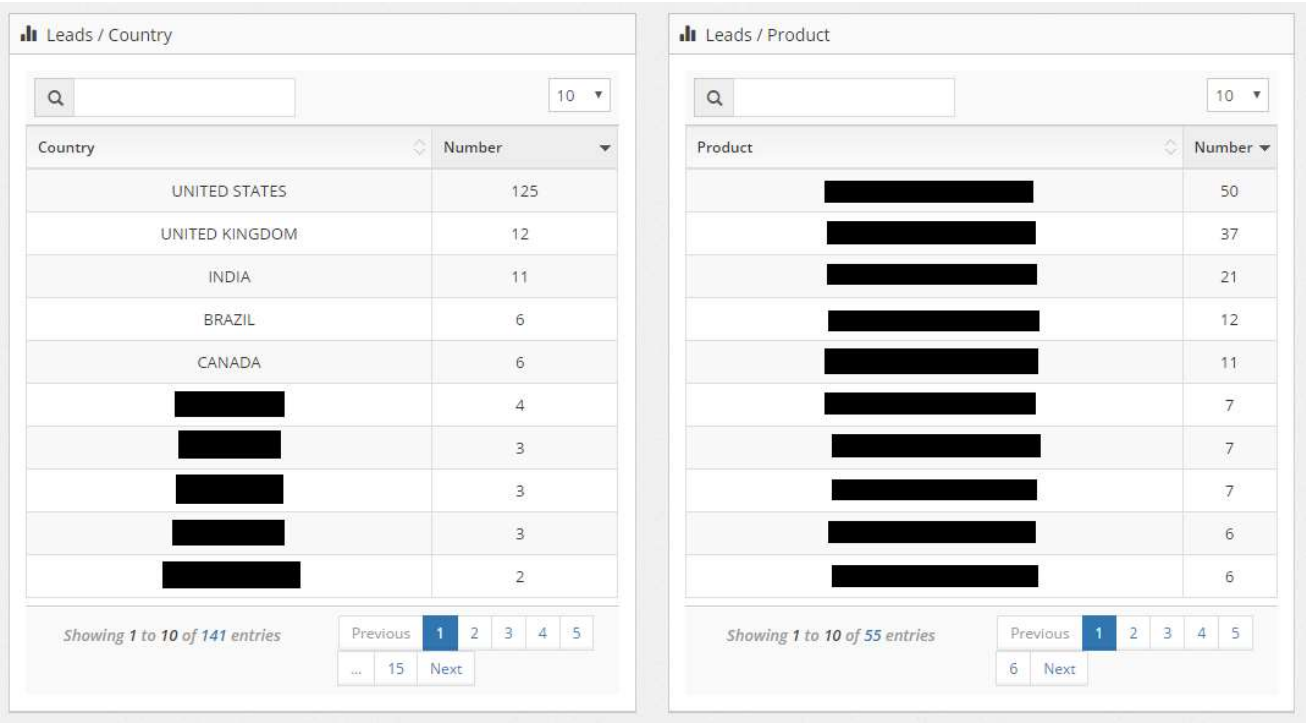
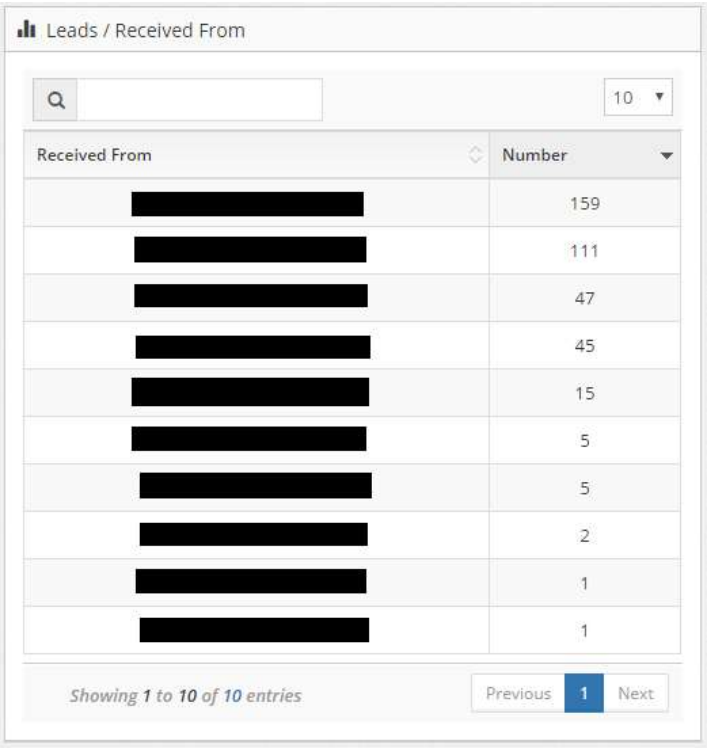
Leads per Country, Product and Source section





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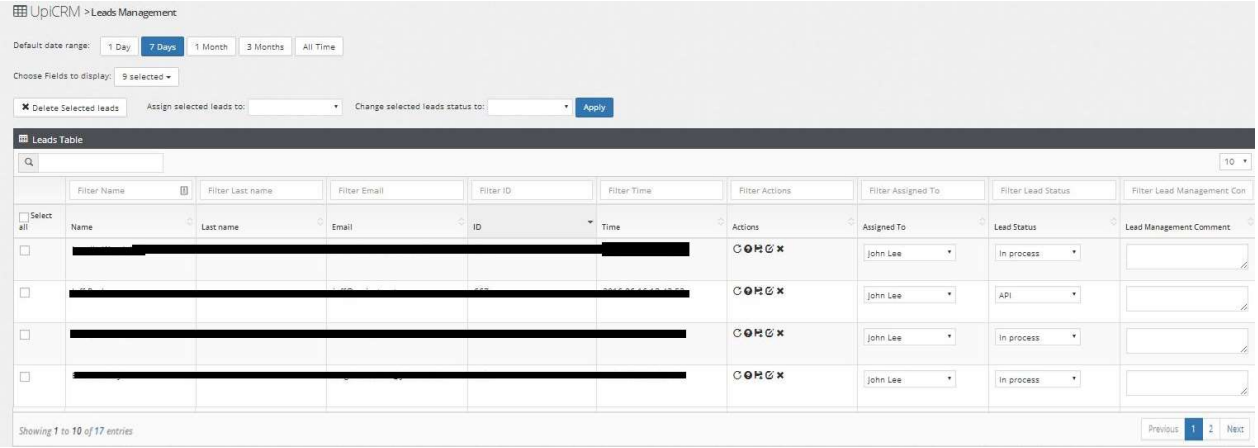
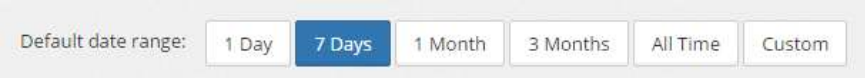
Lead Management

This screen presents all leads accumulated in UpiCRM in one table:

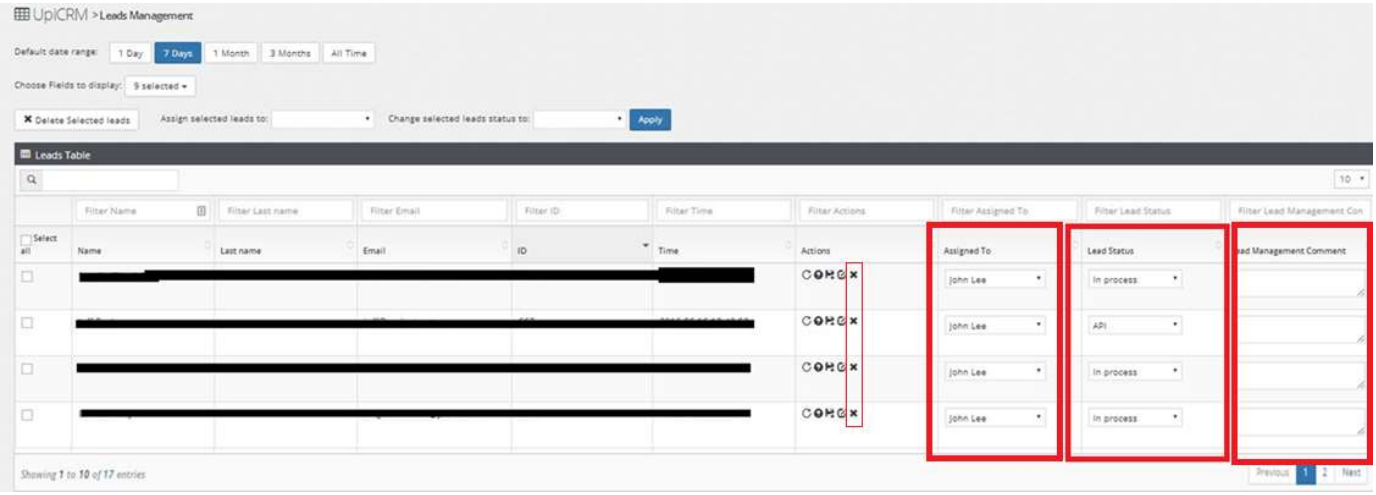


The table can be filtered by date:



You can select which columns will be displayed out of all of the data fields contained in the UpiCRM database.

Use this screen in order to change a lead's status, change who the lead is assigned to, add lead management comments, and delete selected leads.



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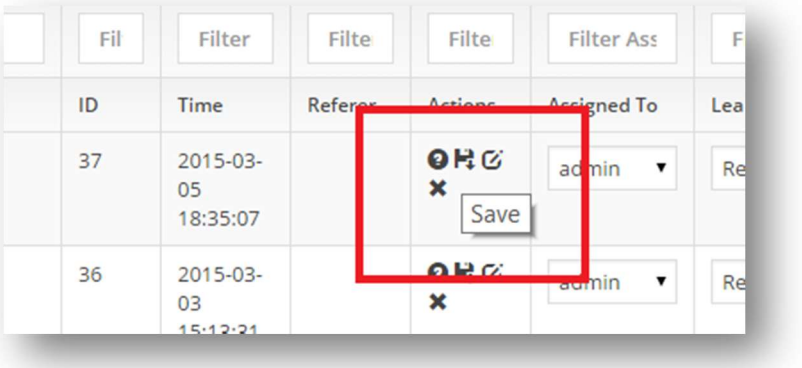
Note: Always remember to click on the "Save" icon - ' ' - in order to save your changes

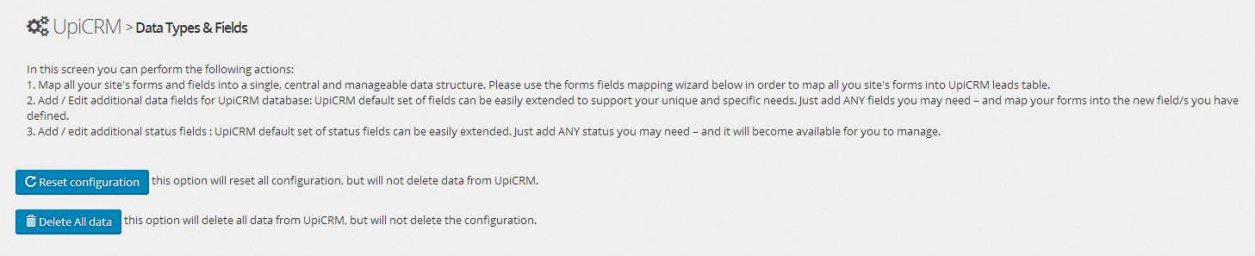


You can also request a status update from the lead's owner: use this option when a lead had been reassigned to another person in your team, in order to send an email from the new lead manager to the former one, requesting a status update for that lead.

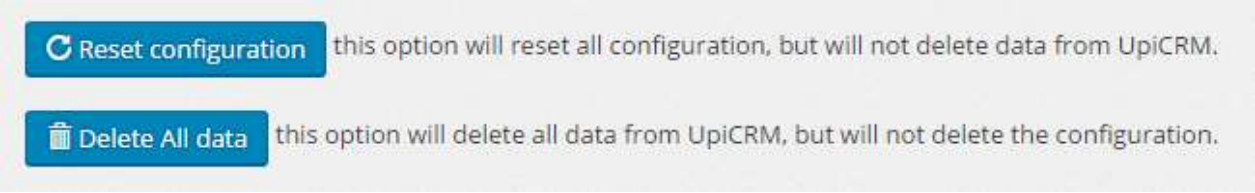
Data Types & Fields

As this window contains a lot of information, each part will be discussed in detail below, from top to bottom.

Top Section



Reset or delete:



1. **"Reset all":** Reset all settings, but keep data safe and intact. It is still highly recommended to back up the website prior to performing this action.

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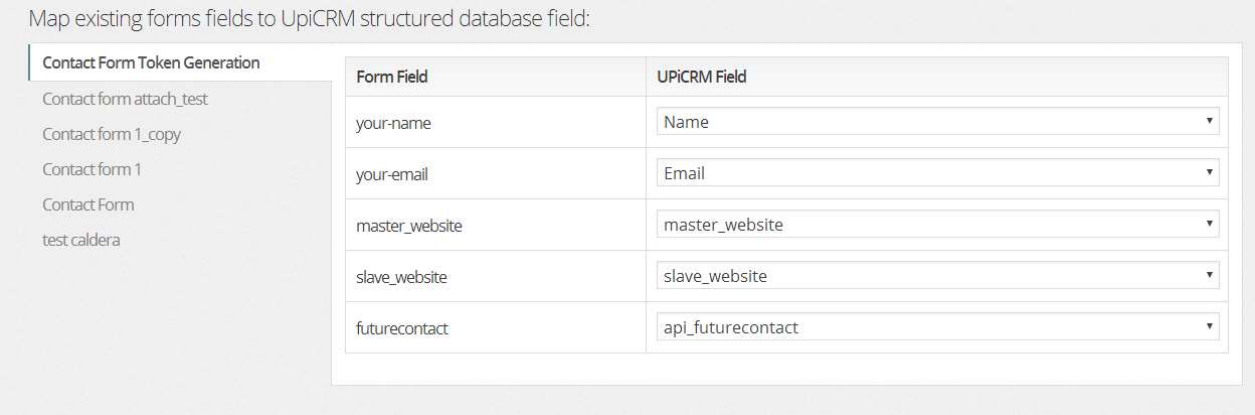
2. **"Delete all":** **PLEASE USE ONLY AFTER SERIOUS CONSIDERATION!** This will erase all your records from your database, but will not reset configuration.

Mapping Form Fields to UPICRM Database

UpiCRM connects to the form plugins installed on your site (currently supported are Contact form 7 + Contact form DB, Gravity forms, Ninja Forms and Caldera Forms) and collects their entries into its database.

Map the fields in your forms into the fields in UpiCRM in this section.

This allows you to regulate the data from your different website forms into a uniform database.



Add New Fields and Status Descriptors to UPICRM

UpiCRM includes a list of fields by default. You may also add any additional field you would like in this section.

You can also add any additional statuses to the default list of lead statuses.

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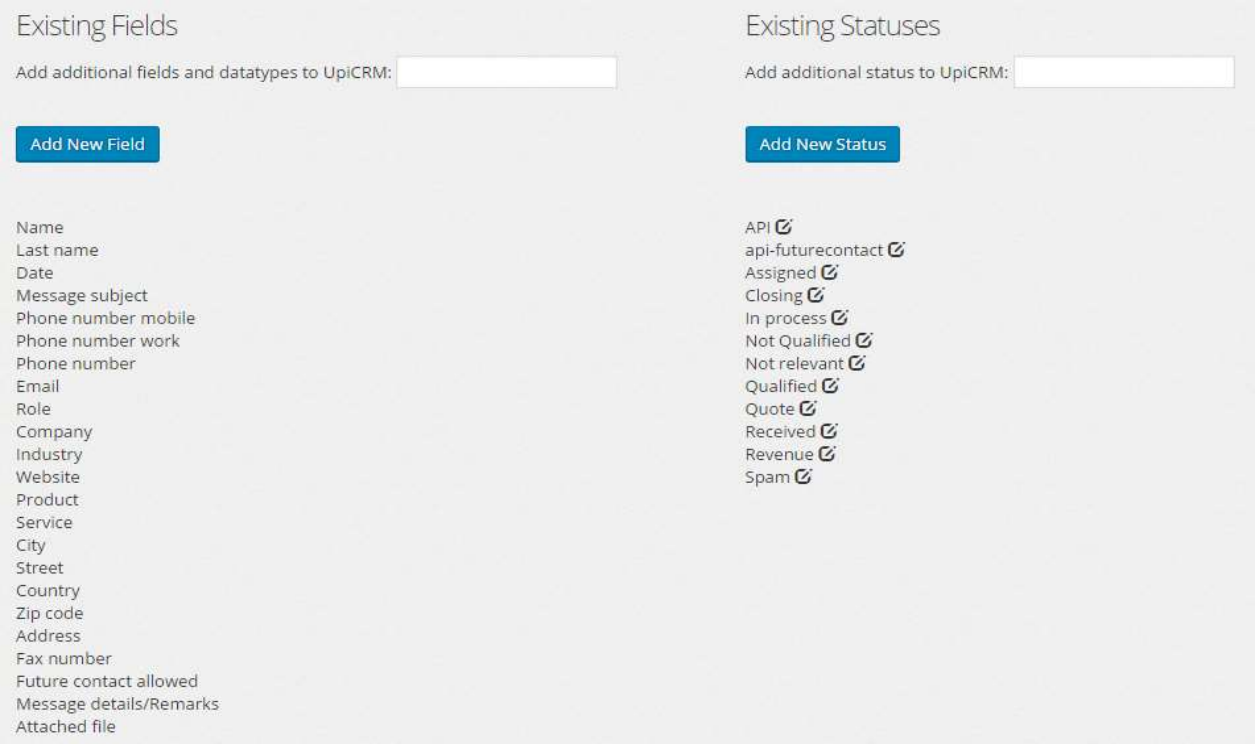

Email Notifications

In this screen you can configure the email notification settings of UpiCRM.

Lead Management section

- **Send all leads and updates to the following user**: Choose to send all new leads by email to any single UpiCRM user.
- **Leads are by default assigned to**: Assign all new leads to the selected UpiCRM User.
- **Email format**: You can choose to send email notifications as plain text or HTML. As some external systems (SalesForce, ZohoCRM etc.) will required plain text in order to parse new leads, you may choose to change the default format to plain text.
- **Distribute all leads and updates to additional address(es):** Send all leads and updates to any external email address, or to a list of comma separated (",") email addresses.
- **Change default "from" field for emails sent from UpiCRM**: Set the "from" name used on email sent by UpiCRM.

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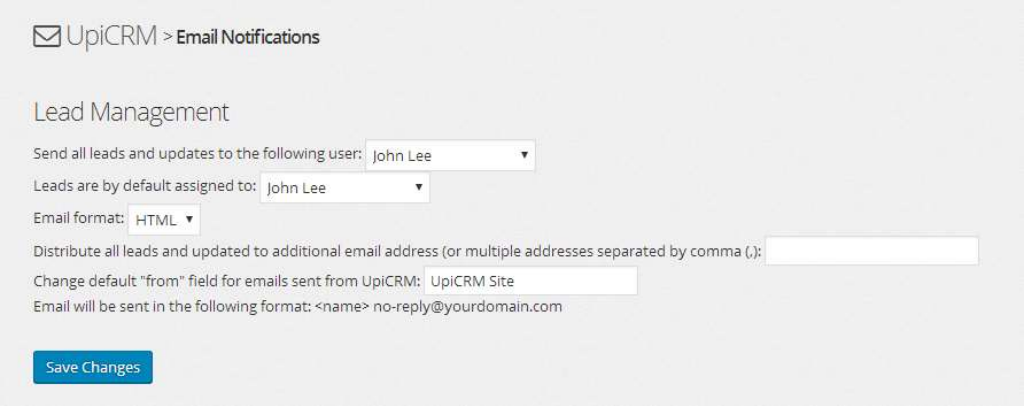
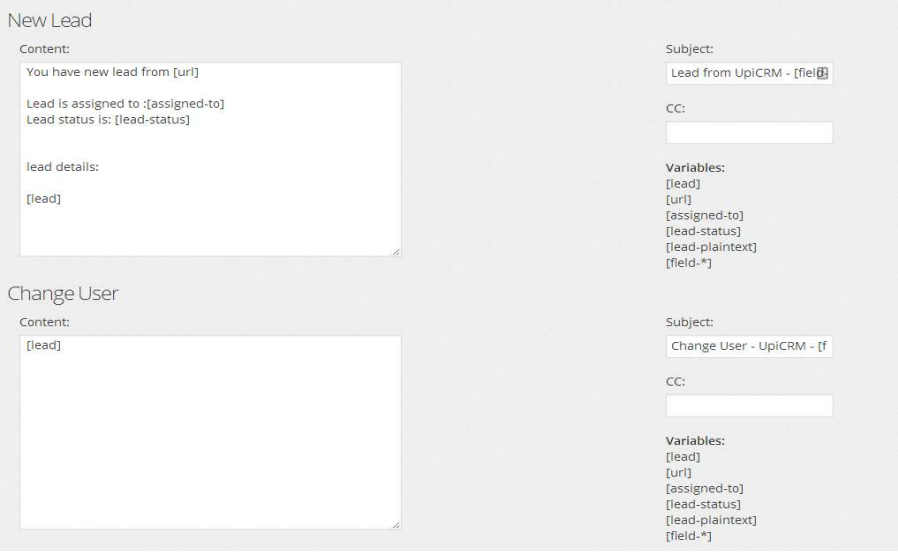


New Lead, Change User, Change Status, and Request Status sections

UpiCRM will consistently inform you and your team about any reception/edition/modification of any lead.

In this screen you can personalize the messages you wish to distribute, by editing the email templates.

You can use various variables from your lead fields.



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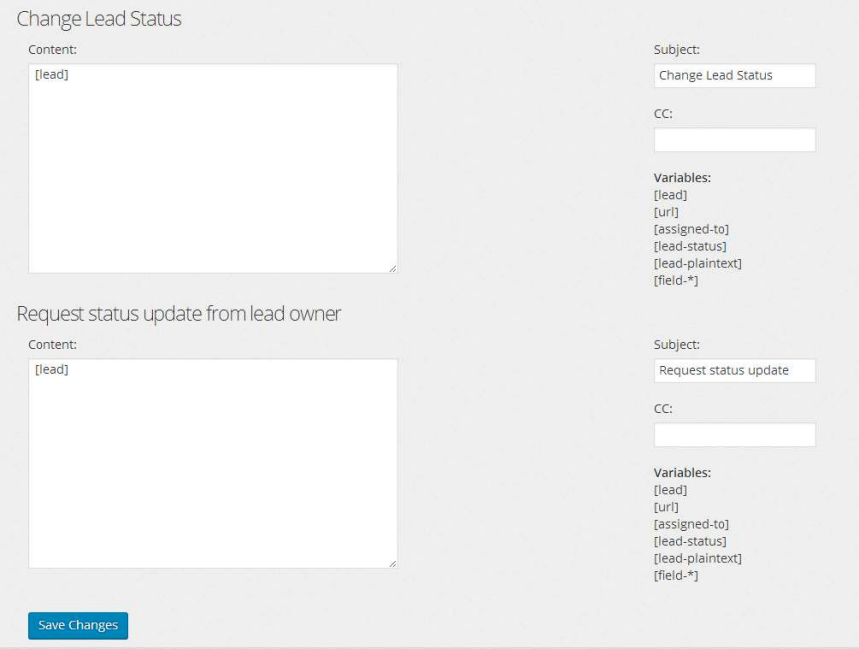
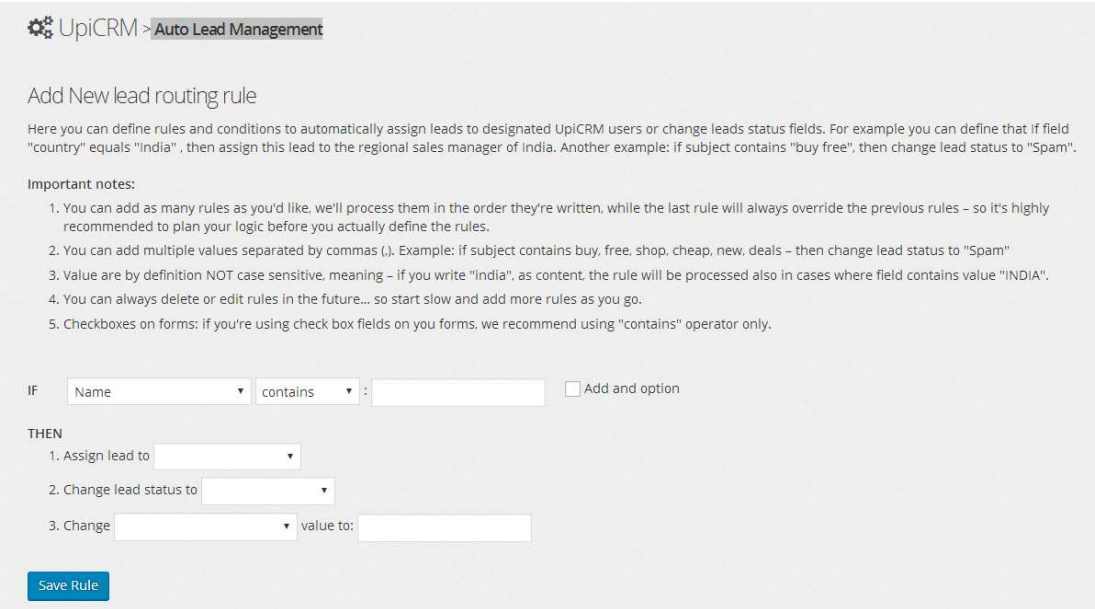


Auto Lead Management

UpiCRM now allows you to automatically manage your leads' distribution and assignment, based on the contents of the data received. In this screen you can define rules for automatic lead routing.

Add new lead routing rule



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Rules for example:

- If field "Country" equals "India" - assign lead to "John" (Our Indian sales manager)
- If field "Subject" contains "support" – send lead to support@company.com and change lead status to "Support Request".
- Spam killer example: if "message details" field contains "Free, cheap, buy, increase, sell" (multiple values separated by comma “,”) then change lead status to "Spam".
- If field "Future contact allowed" is bigger then 1, then change lead status to "Newsletter".

You can define all sorts of new fields, users, and statuses.

- Rules can also write into the content fields of the lead in the database. For example: if "message details" field contains "shirt” then change lead Product field to "Clothing" .
- You can define multiple rules to work together with an “and” logic.

Note: if you select more than one person to “Assign lead to”, every lead will be distributed to each assignee in turn, one after the other, in a “Round-robin” que. A lead will NOT be distributed to more than one person simultaneously!

Lead Routing Table

Lead Routing Table

Field	Operator	Value	Assign lead to	Change lead status to	Add field value	Actions
Name	bigger than	0		In process		
Message details/Remarks	contains	SEO, traffic, buy, cheap	Upi Developer	Spam		
Message subject	contains	support	John Lee	In process		
Message details/Remarks	contains	traffic, seo, buy	Upi Developer	Spam		

New rules override older rules.

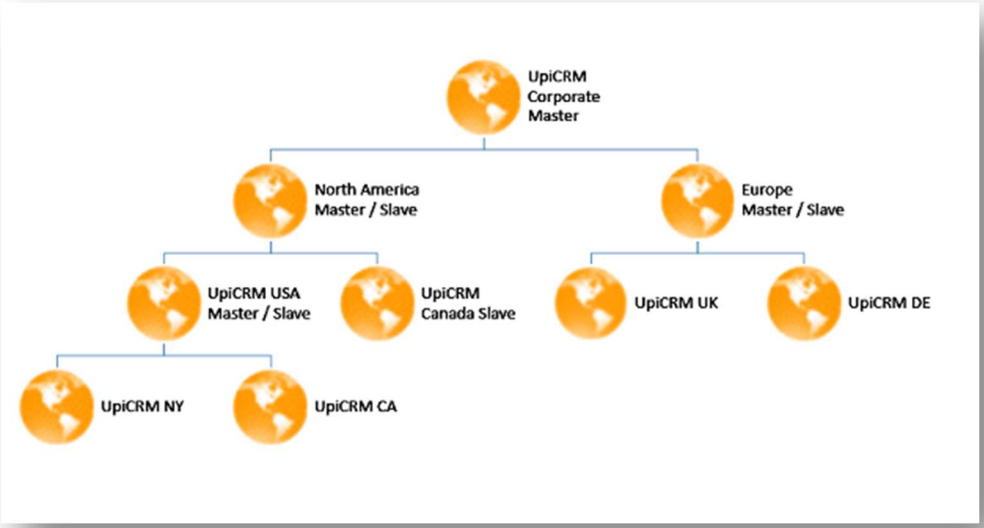
Lead Aggregation

With Multi Server Installation – UpICRM slave / Master setup

UpiCRM can act as an aggregator of leads from multiple / remote web sites. This means that a UpiCRM master can receive leads from any other UpiCRM "slave”, as long as the connection (pairing) is performed. UpiCRM can work in complete orchestration, receive / send leads from and to multiple servers at the same time.

In order to get your required API key, please visit http://www.upicrm.com/apikey

More documentation can be found on: http://www.upicrm.com/docs



Send Leads to Remote UpiCRM MASTER

Send Leads to Remote UpiCRM MASTER: This UpiCRM is a SLAVE, and is sending new leads to the below listed and confirmed UpiCRM MASTERS:

URL: http:// API Key: (?) Add

UpiMaster Table

UpiMaster Table

Domain	Secrete shared API key	Status	Actions
[redacted]	02c3ec[redacted]	Connected + Last checked 26/04/2016 18:37:55; Remote UpiCRM installed: V2.0.0.0	

Receive Leads from Remote UpiCRM SLAVE

Receive leads from remote UpiCRM SLAVE: this UpiCRM is a MASTER, and is receiving new leads from the below listed and confirmed UpiCRM SLAVES:

URL: http:// API Key: (?) Add

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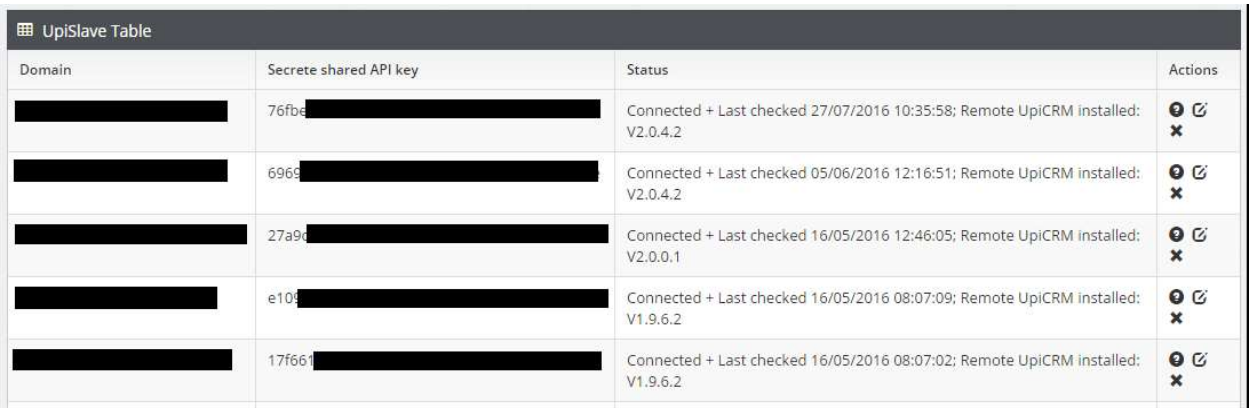
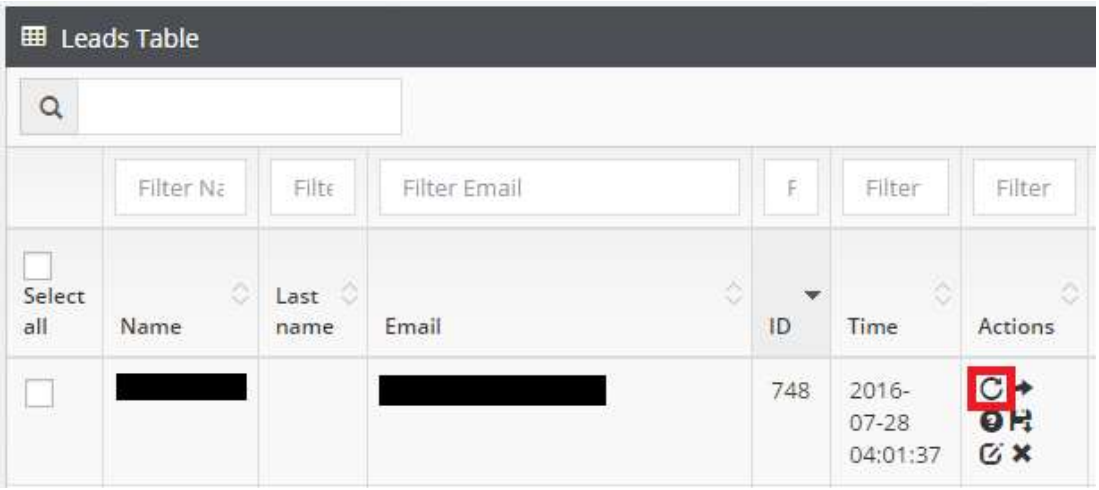
UpiSlave Table



Note: on the leads management table, you can re-transmit a lead to the master server if an error occurred:



Web Services

UpiCRM can transmit leads to a remote source using HTTP Post method.

Outbound Web Service

Transmit leads to a remote web service, using POST method.

UpiCRM can transmit leads to remote source using HTTP Post method, as shown below:

1. URL: http://www.remoteserver.com/programname.php?username=user&password=pwd
2. Status:
    a. Manual: when choosing “Manually transmit lead to a remote web service” form the leads management table.
    b. Always On: all received leads are immediately transmitted to a remote server.
    c. On by Auto Lead: allows you to set rule for transmitting leads to a remote service by using the “Auto lead management” option on the UpiCRM menu.

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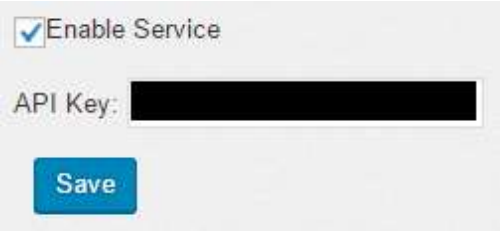
Inbound Web Service

Accept leads from remote sources using POST requests.



UpiCRM inbound web service allows you to receive leads from external sources using simple HTTP POST request.

In order to implement this capability, you should enable the inbound web service and set an API key in the “Web Services” section in the UpiCRM menu.

The POST request should be sent to your WordPress URL (i.e.: www.yourwebsite.com/) with the following query string parameters:

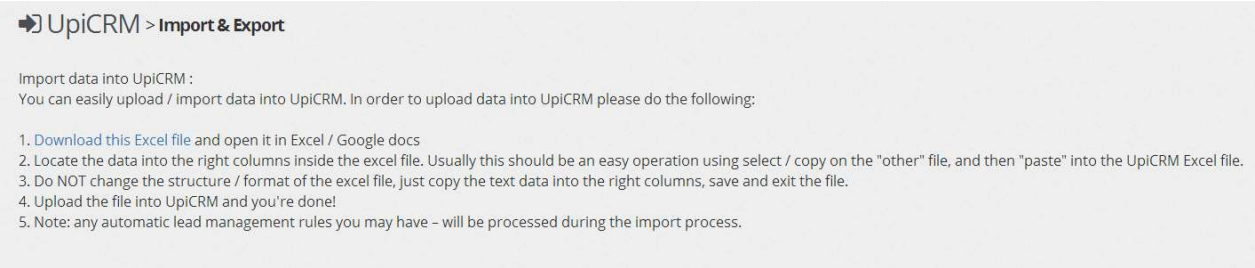
1. upicrm_integration_action=save_lead
2. upicrm_integration_key=your_selected_key

The POST data should contain a single value called lead_content_arr, presumed to be a JSON object that contains the lead information, as shown below:

```
curl -X POST --data 'lead_content_arr={"Name":"danid", "Email":
"bb@cc.com"}' "www.domain.com/wordpress/?upicrm_integration_acti
on=save_lead&upicrm_integration_key=70093819051389068 95"
```

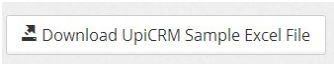
Import & Export

Importing data to UPICRM Database



In order to import (upload) data to UpiCRM database, please do the following:

1. Download this Excel template file and open it in Excel / Google Sheets. The Excel template file can also be downloaded by clicking here:

2. Copy your data into the matching columns in the excel template file. Usually this should be an easy operation using select / copy on you "other" file, and then "paste" into the UpiCRM Excel file.

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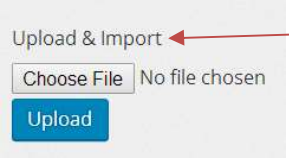
3. Do **NOT** change the structure / format of the excel file, just copy your text data into the proper columns.
4. Save and exit the file.
5. Upload the file to UpiCRM and you're done.

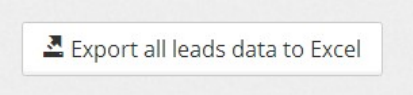


Upload the updated excel template file

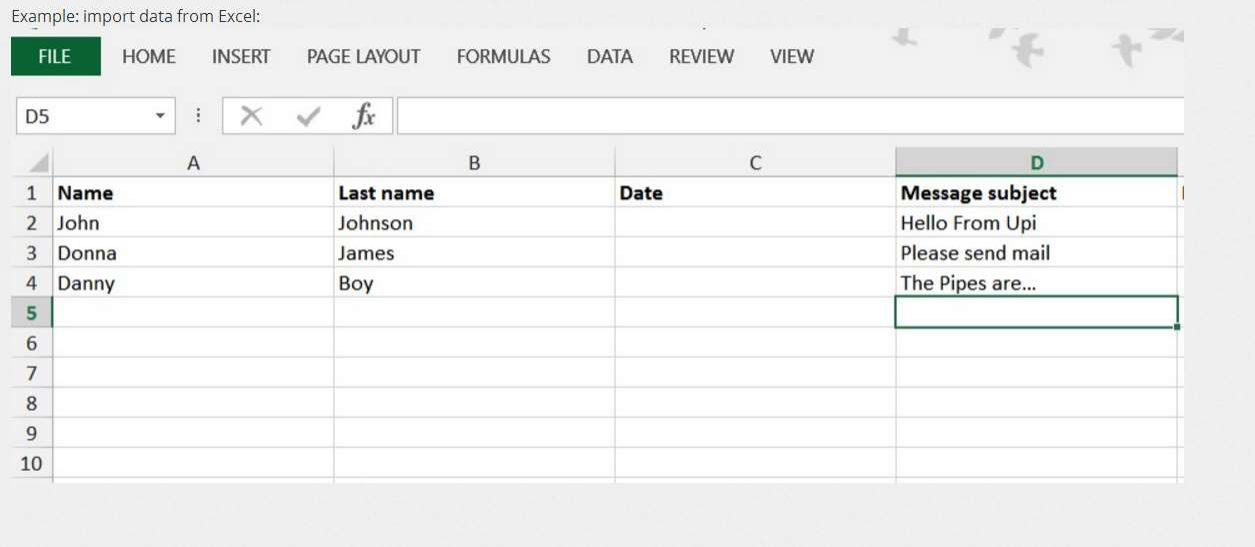
6. Note: Each automatic lead management rules you may have, will be processed during the import process.

Exporting leads database content from UPICRM to local Excel file

Click here:



The UPICRM database content will be downloaded into an excel file named leads.xlsx



Importing Plugin Forms database content (when available) to UPICRM Database

Note: this will import data from the forms you're currently using, only if they are configured to save entries in a database. Only database content available at the moment of this action will be imported.

Data entered afterwards will not be imported.

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Users Center

UpiCRM is designed to work in a multi-user / global organization environment, with up to 5 tiers of users, per your choice / definition.

For Example, you can define a single "Global Sales Manager", three "Regional Sales Managers", under each of them - local "Sales Representatives" that are working with "External Distributors".

Per every user you can define:

1. Permission to re-assign leads back to the manager in charge.
2. Enable/Disable sending email status updates to the manager, per each status change.

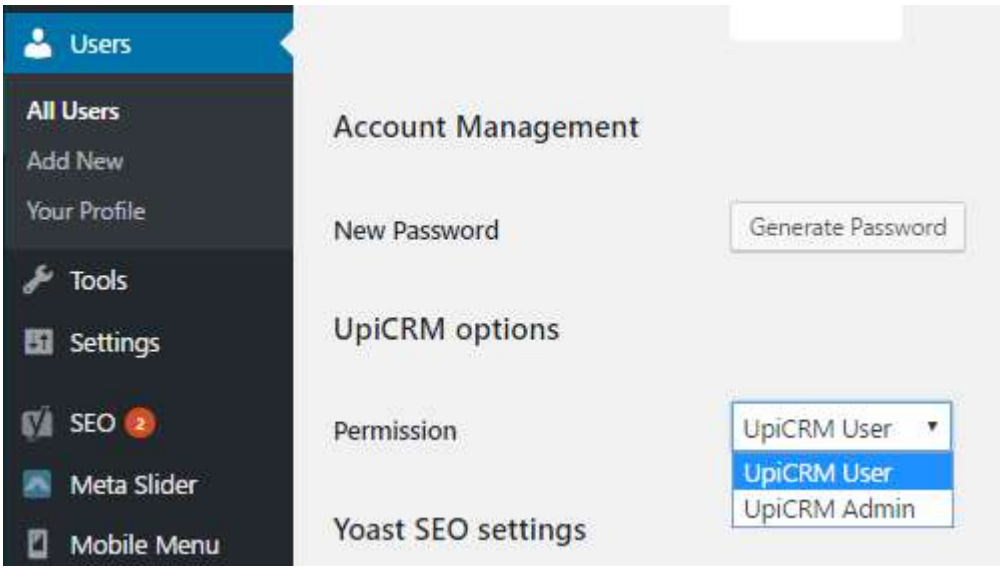
All users, when connected to the UpiCRM dashboard, will see not only the leads assigned to themselves, but also the aggregation of leads assigned to the users reporting to them.

Add User

In order add users to UpiCRM:

1. Add a new WordPress "subscriber" user (**Important:** Do this before Adding UPICRM user/s).

After adding a user to your WordPress site, please assign UPI user rights to the new user, by editing the new user's profile, UpiCRM options – Permissions – drop down list:



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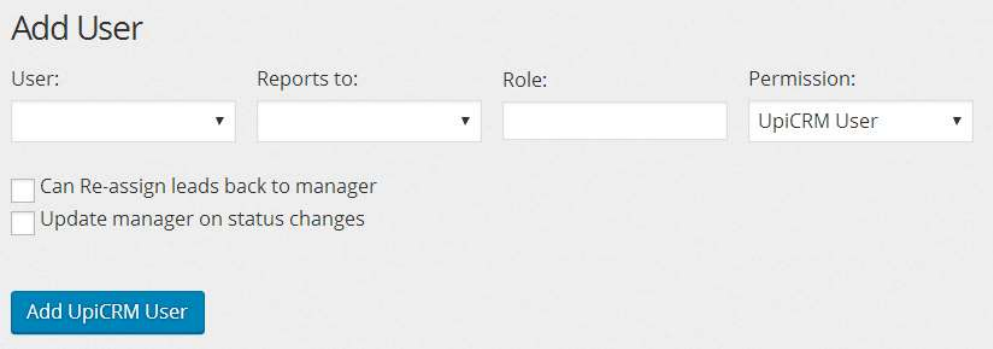
2. Add the new user to UpiCRM:



a. Choose the new user from the drop down list

b. Choose his manager from the drop down '**Reprts to**' list

c. Add role (free text / label)

d. Choose permission (role): UpiCRMUser/UpiAdmin

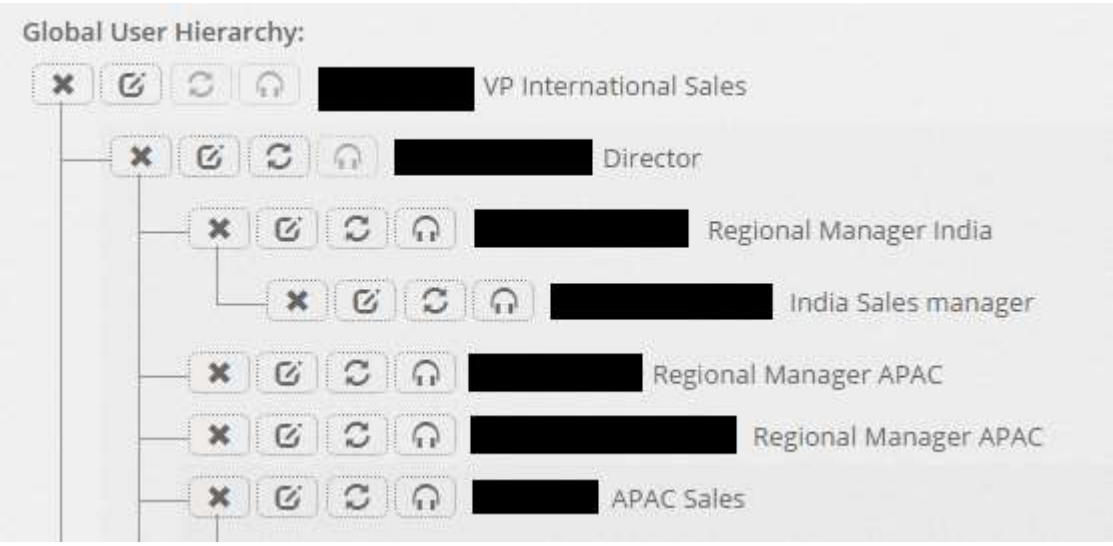
e. Choose if a user can re-assign leads back to the manager? yes/no.

f. Choose if the manager will receive notifications on the user status updates? yes/no.

Note: you can always click the "edit" icon and change the user's role/position/permissions.

Global User Hierarchy

This is a graphic representation of the UPICRM User Hierarchy tree



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UPICRM INSTALLATION

UPICRM complies with WordPress plugin requirements, so just add it as you would with any new WordPress plugin.

After successful addition, activate the UpiCRM plugin.

UPICRM Initial Configuration

Step 1: Set up users and roles

UpiCRM has two built in user roles:

UpiCRM Admin: Can configure all options, can view and edit all leads, can access UpiCRM dashboard, and perform any additional task UpiCRM allows.

UpiCRM User: Can view & manage leads assigned to him only.

Simply create a WordPress user using the default "Users" menu provided by your WordPress management interface. Navigate to the lower end of the page, and assign the new user the desired UpiCRM role:

Note: For existing WordPress user(s), simply assign to each a user role.

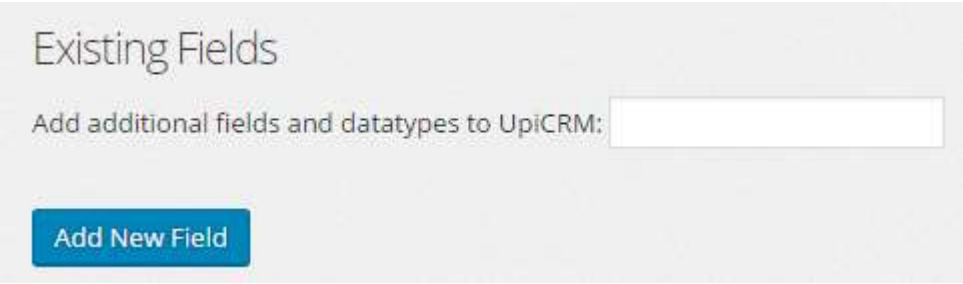
For more details please refer to 'Users Center' information above.

Step 2: Map all of your existing forms and fields into UpiCRM's structured database

UpiCRM needs to import all your data and map all your current forms and fields into its superset of structured database.

In order to perform this task, perform the actions detailed in 'Mapping Form Fields to UPICRM Database' above.

Tip: if you are using an additional field that does not appear on the UpiCRM predefined fields list, you can always add it to the UpiCRM database using the "Add additional fields and datatypes to UpiCRM" option:



Note: this procedure needs to be performed only once per every form on your website.

Please remember to map the fields of the new form whenever you add a new form to your site in the future!

Step 3: Edit Email notifications

UpiCRM will consistently inform you and your team about any reception/editing/modification of any lead.

Take a couple of minutes in order to personalize the messages you wish to distribute, by editing the Email templates in the 'Email Notifications

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In this screen you can configure the email notification settings of UpiCRM.

Lead Management section

' screen above.

Tip: use the variables [lead], [url] and [assign-to], and/or [field-any-field-name] in order to embed information into the email notifications you send. Example: Lead from: [Field-Name], [field-Country].

Basically, you're done.

You can now start managing your leads and prospect customers.

Has it been more than an hour or so since you started the installation process?

If you have come across any issues or difficulties –

please let us know using our online contact form on

http://www.upicrm.com/contact

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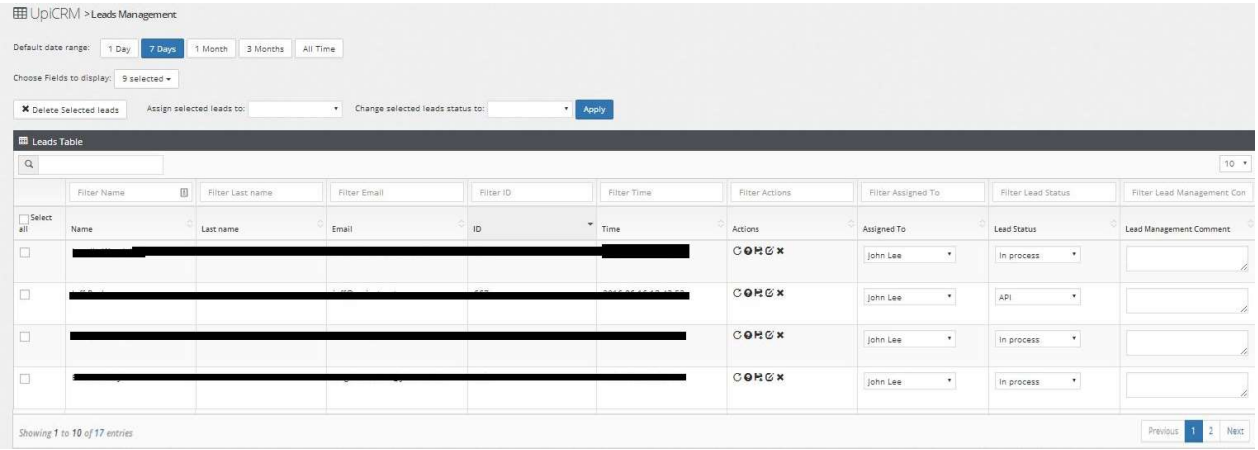
UPICRM OPERATION

Lead Management with UPICRM

Once all the data is collected, organized and available to your team, you can now manage your leads and customers by working with the UpiCRM leads database:



The operations you can perform on each database record are:

- **Edit records:** simply choose the **edit** icon on any record, make your changes and then click on the **save** icon in order to save your changes.
- **Delete record**: use the **delete** icon in order to delete a non-relevant record from the database.
- **Request status update from lead owner**: use this option when a lead had been moved to another person in your team, in order to send a mail from the new lead manager to the former one, requesting a status update for that lead.
- **Select what data will be shown to you by default**: use the "rows selected" dropdown menu in order to choose the default set of information you will be presented with upon accessing this screen, and use the “Default date range:” buttons to filter the date range of the leads shown in the table.
- **"Assign to" option**: use this dropdown menu in order to assign leads to you team members. Every user assigned with a new lead, will receive an immediate eMail notification with either the default notification or with the personalized mail you have previously defined during the first-time configuration process.
- **"Lead Status" option**: use this dropdown menu in order to manage the status of a lead as you keep tracking his status.
- **"Message details/Remarks":** edit this text box in order to add more information to leads and records. Don't forget to add meaningful information such as date when a note was taken, and be sure to hit the "save" icon when you have finished.

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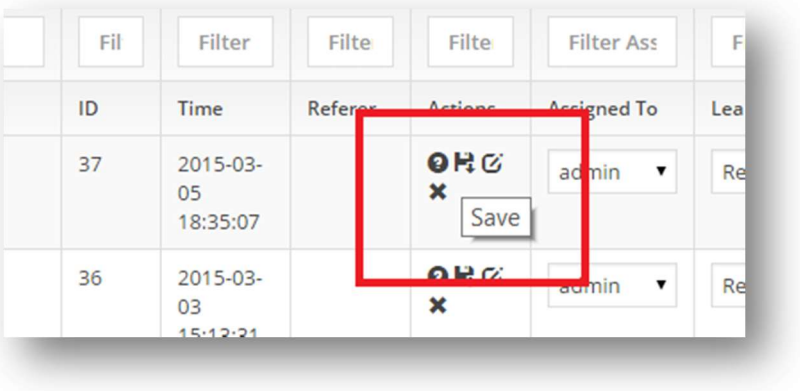
- **Transmit lead:** You can transmit lead to a UpiCRM Master. See "Lead Aggregations" section on order to learn more.

Note: Always remember to click on the "Save" icon - ' ' - in order to save your changes



Analysis, tracking and Marketing effectiveness with UpiCRM

*The Challenge: Tracking leads from **actual** traffic sources – campaigns, referring sites, search engines etc., through the complete lifecycle of every lead, and creating the full picture of your marketing effectiveness.*

UpiCRM supports URL tagging, used for identification of traffic sources to a web site.

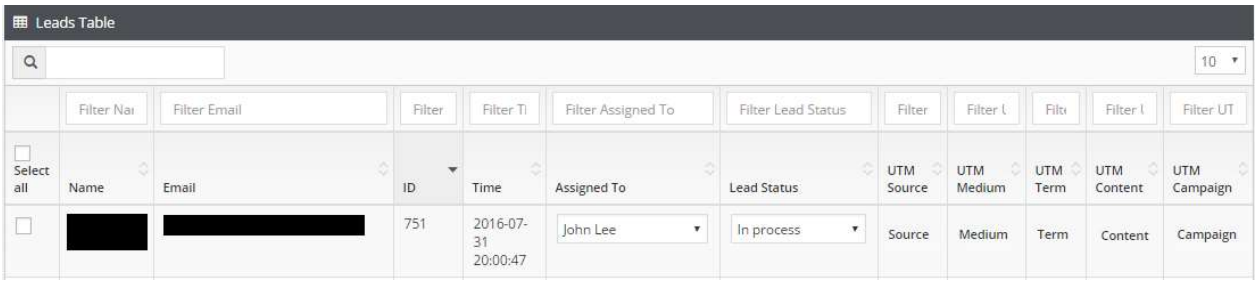
Note: Please read more about URL Builder provided by Google. (link)

This means that if you tag all your inbound traffic in compliance with the UTM tagging rules, UpiCRM will attach the traffic source to each and every lead received.

For example, if you use the link

www.website.com/?page_id=100&utm_source=source&utm_medium=medium&utm_campaign=campaign&utm_term=term&utm_content=content

UpiCRM will show these UTM tags in the Leads Table for leads arriving using this link:



In addition, UpiCRM will also attach the HTTP referrer parameter to every lead, so you'll be able to track the source per every lead in your database.

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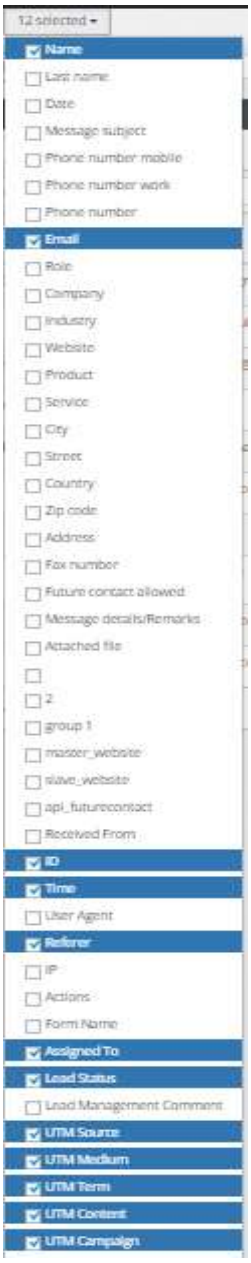
The bigger picture: With UpiCRM you will be able to analyze the effectiveness of all your marketing activities and traffic sources, both on a single lead basis, and up to a complete reporting and analytics information.

The way to achieve this is simply by adding the built-in fields - ‘HTTP referrer’, ‘Campaign Source’ (utm_source), ‘Campaign Medium’ (utm_medium), ‘Campaign Term’ (utm_term), ‘Campaign Content’ (utm_content), ‘Campaign Name’ (utm_campaign) to the default "View leads" table.



Alternatively, simply export all data to excel in order to create your own views and analysis.

FAQ

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Q: What does UpiCRM do?

A: UpiCRM is a WordPress plugin that enables you to manage your customers throughout the complete lifecycle of the “leads to customers” process.

Q: CRM solutions are known to be very hard to implement… How easy is UpiCRM, starting with installation, set-up and work cycle?

A: Based on our experience, UpiCRM is the simplest and easiest to install, configure and manage solution currently in existence. A typical installation should take no longer than a couple of hours.

Q: With which ‘form plugins’ does UpiCRM work currently?

A: Currently UPICRM supports **Contact form 7** + **Contact form DB**, **Gravity forms**, **Ninja Forms and Caldera forms.** If you are using another solution, please contact us on www.upicrm.com/contact, and we'll be happy to promptly respond to your needs and those of the community. Caldera forms generates a lot of requests from users… hopefully we’ll have it soon.

Q: Is UpiCRM free?

A: Yes. Please read the license file located in the installation ZIP file.

Q: How can I track lead source in UpiCRM?

A: UpiCRM provides 3 ways of tracking a lead source: 1) Form name – which form was filled? 2) traffic source – Referral – from which site/URL did the user arrive from? 2) UTM URL Tagging : add UTM tags to all campaigns and traffic sources for your site, UpiCRM will parse and attached this information to every new lead.

Q: What about multilingual support? What Languages do you currently provide?

A: UpiCRM supports translation to any language you desire. Currently we support English, and Spanish. Russian translation is on its way.

Q: Can I use UpiCRM to aggregate leads from more than just one website?

A: Yes, your UpiCRM can act as a slave/master, and can send leads from multiple WordPress sites into a single location for you to manage all your leads in a single place.

Q: Can I import data from an Excel file into UpiCRM?

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A: Yes! Go to "Import/Export" screen, download the UpiCRM_Format.xlsx template file, copy & paste the data into the file, and upload it back to the server. UpiCRM will import all data into its database, and will process the automatic rules you have defined.

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CONTACT AND SUPPORT

Supported Platforms: WordPress V3.X, V4.X, RTL. (no LTR support on current version)

Supported Languages:

UpiCRM supports translation to any language you desire. Currently we support English, Spanish & Russian.

If you want to translate UpiCRM to your native language – we'll be more than happy to work with you, just contact us!

Spanish Translation of UpiCRM was provide by:

Andrew Kurtis from WebHostingHub.

For all contact request please email info@upicrm.com or fill out a contact form at http://www.upicrm.com/contact

Complete / updated version of this document can be found at

http://www.upicrm.com/docs

CHANGE LOG

Version 2.0:

* Improved leads management table, filtering, bulk actions, faster loading.
* Dashboard design – improved UI, design and presentation.
* User hierarchies and roles – up to 5 levels of Upi-Users, from General Managers to a local / external distributors, all in a single user managing center.

Version 1.9.4.1:

* Integration Center: UpiCRM can act as an aggregator of leads from multiple / remote web sites. This means that a UpiCRM master can receive leads from any other UpiCRM "slave", as long as the connection (pairing) had been performed. UpiCRM can work in complete orchestration, receive / send leads from and to multiple servers at the same time.
* Minor UI / Bug fixes.
* Improved e-mail notification: Use [field-*] (* - UpiCRM field name) in order to include lead details in e-mail subject (New Lead from John Smith – UK…)
* Send mail bug fix

Version 1.9.6.1:

* Removed CSS objects in order to prevent UI problems.
* Added new feature: Import from Excel file - you can now import new data into UpiCRM!

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