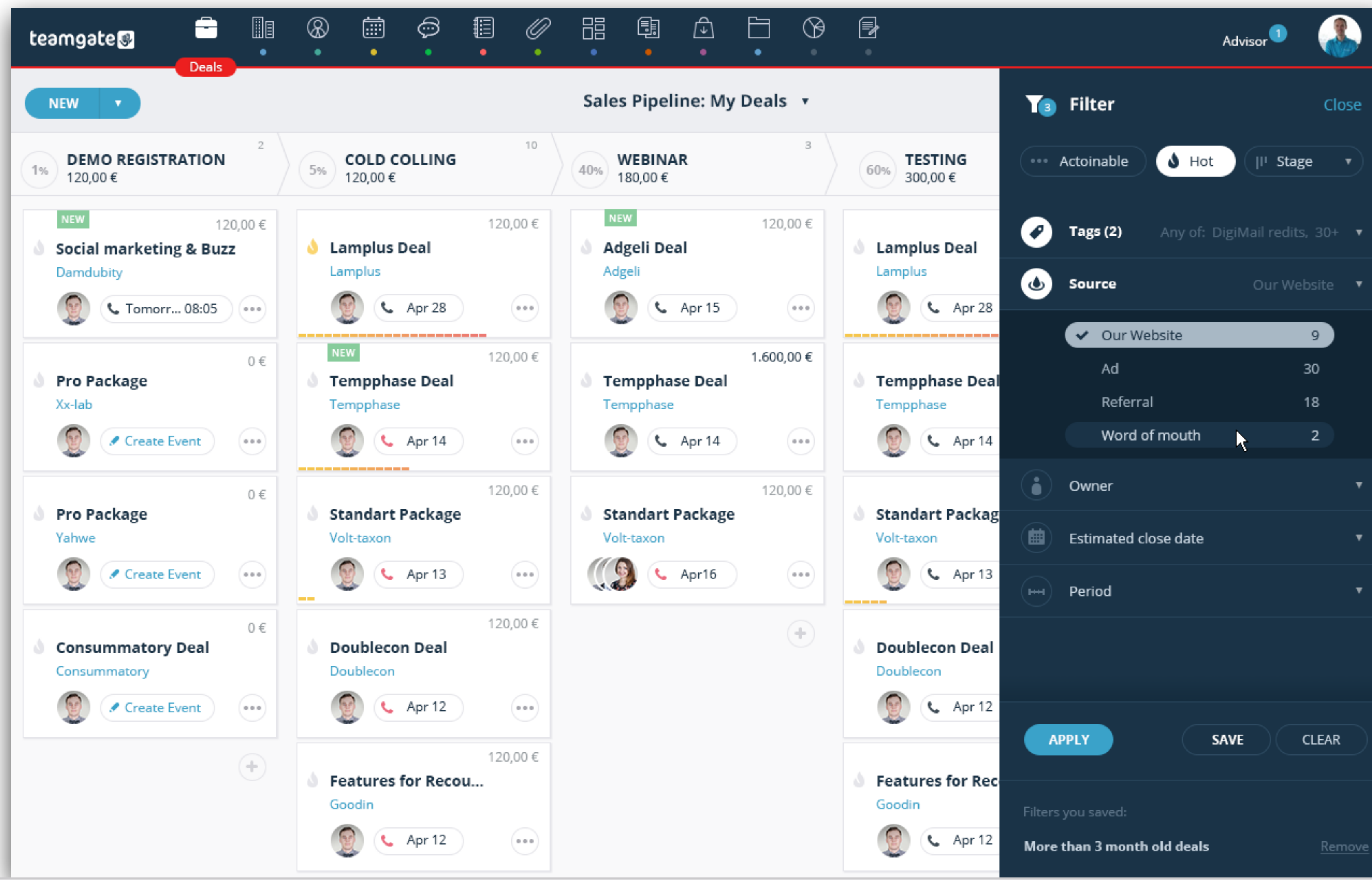
Teamgate CRM Guide

Last update: September 1, 2015

Understanding and Learning the Basic Features of Teamgate CRM



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This guide is meant to help businesses, which already use or consider to purchase Teamgate as a CRM.

The guide covers basics of Teamgate features, key concepts, tips, tricks and advices. Also, you will find here information about common tasks performed in Teamgate - like using Talk features, running Reports or importing your data.

To learn more about extra features or find answers that you are looking for, please see our “Support Section”.

Introduction

Please, welcome Your New Team Member – Teamgate CRM.
A CRM that Actually Works for Your Business.

Teamgate has started out as many startups do these days. The most of Teamgate's Team is based in Lithuania, where the product and company itself was launched back in 2012. By raising a "seed" rounds of funding, Teamgate has built a healthy business with 20+ employees, an office in London, and fast growing customer base all around the world.

Teamgate is a cloud based Sales CRM with easy-to-use interface, which aligns you to get more Leads, track your sales process, manage contacts and analyse sales results without efforts.

The product is excellent for small and mid-size businesses or teams which focus on an easy start and do not fit with complexity of the larger CRM tools like Salesforce or Dynamics CRM.

“People don’t buy CRM, they buy better versions of their business.“

Teamgate wisdom.

Key Concepts and Terms

If you're getting up to speed with Teamgate, it's helpful to learn some key concepts and terms. They'll come up frequently as you interact with product, our documentation, and our service professionals. It will help you to understand how Teamgate and its' main components work.

Application

A collection of components such as tabs, icon sections, dashboards, and visual pages. In other words, application is an entire system you work with.

My Account

Each paid or trial customer has its own access to Teamgate application by using special URL address - "Your Account."

User / License

User is a person who has access to your Teamgate account. One user is equal to one license.

Trial

It is an access to your demo Account for a limited time period with an unlimited amount of users.

SaaS

Software delivered not by traditional means (such as on disk) but in the cloud, as a service. There is nothing to download or install, it updates automatically.

Subscription

Regular payment per selected period of time for using your Account. Subscription fee is calculated per active amount of users.

Release

Teamgate releases new features at least once per month. You can find release notes in our "Support Section" in our application.

Teamgate

Meaning the name of the cloud computing CRM service and the company name.

Desktop Navigation

Teamgate uses different icons and colours to indicate every single section in the application.

Leads

People and companies that are potentially interested in your products or services

Companies

List of companies (accounts) you are doing business with

People

List of people you are doing business with

Deals

Sales opportunities related to your contacts

Talk

Social tool for internal organisational communication

Files

All your files in one place

Insights

A complete list of reports related to your goals and sales efforts

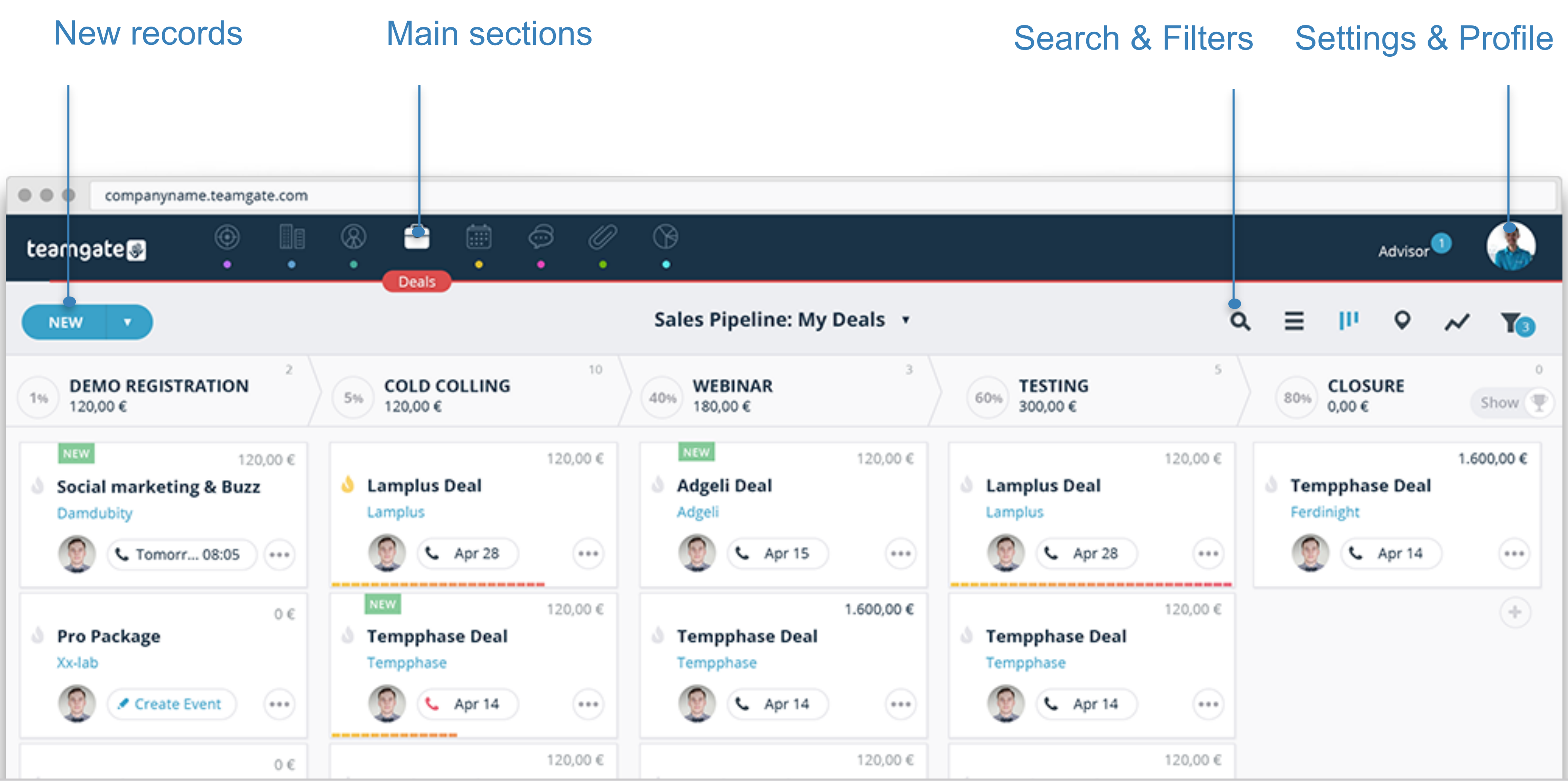
Organizer

Everything for your time management

Navigation

Desktop Navigation

You will find “new” icon in each section to create new records such as Leads or Deals. Each section has its own search tool and filter areas with different extra options, like maps or pipeline. Account and profile settings can be found by clicking on the picture icon on the top right corner of the page.

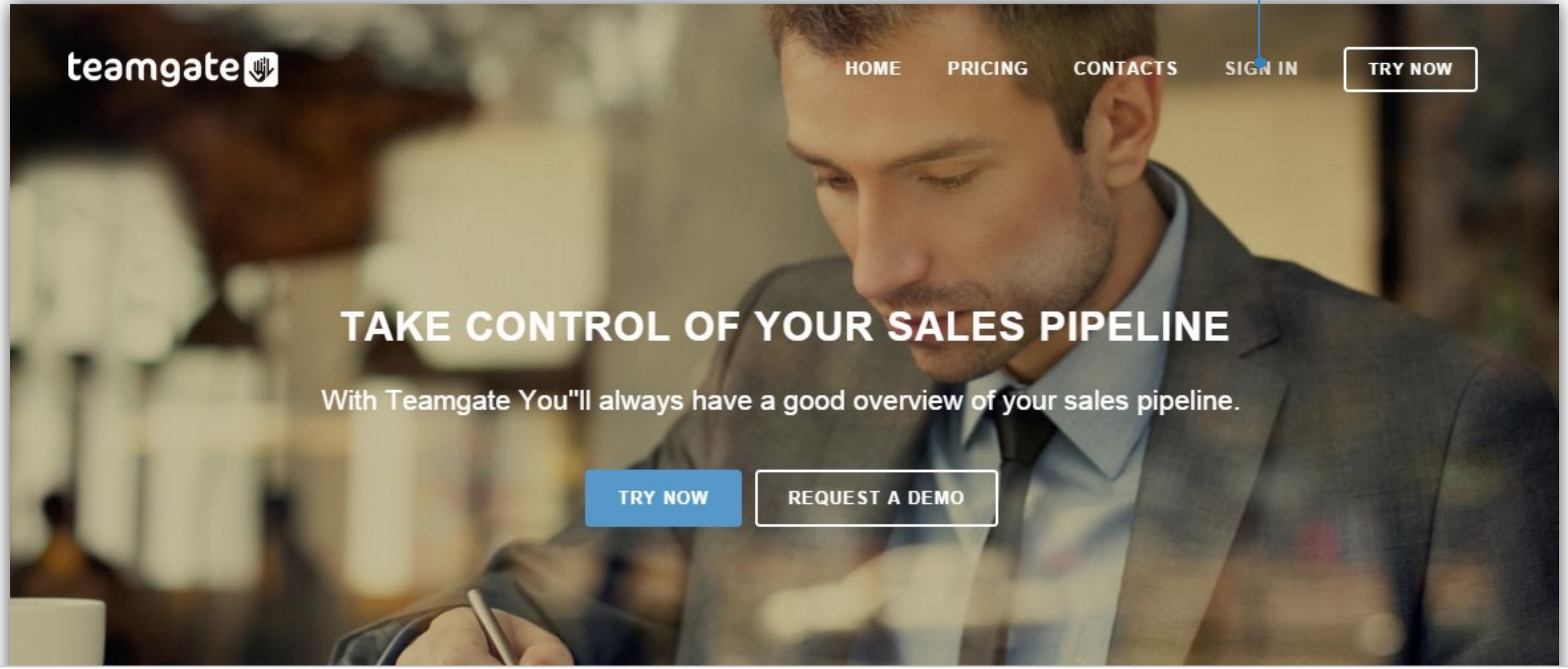


Navigation

Logging in

Simply access Teamgate from anywhere in the world using any device - all you need is an Internet connection. To sign in, visit teamgate.com and click “SIGN IN” button at the top right corner of the page. Enter the credentials and click “Sign In.”

Sign In

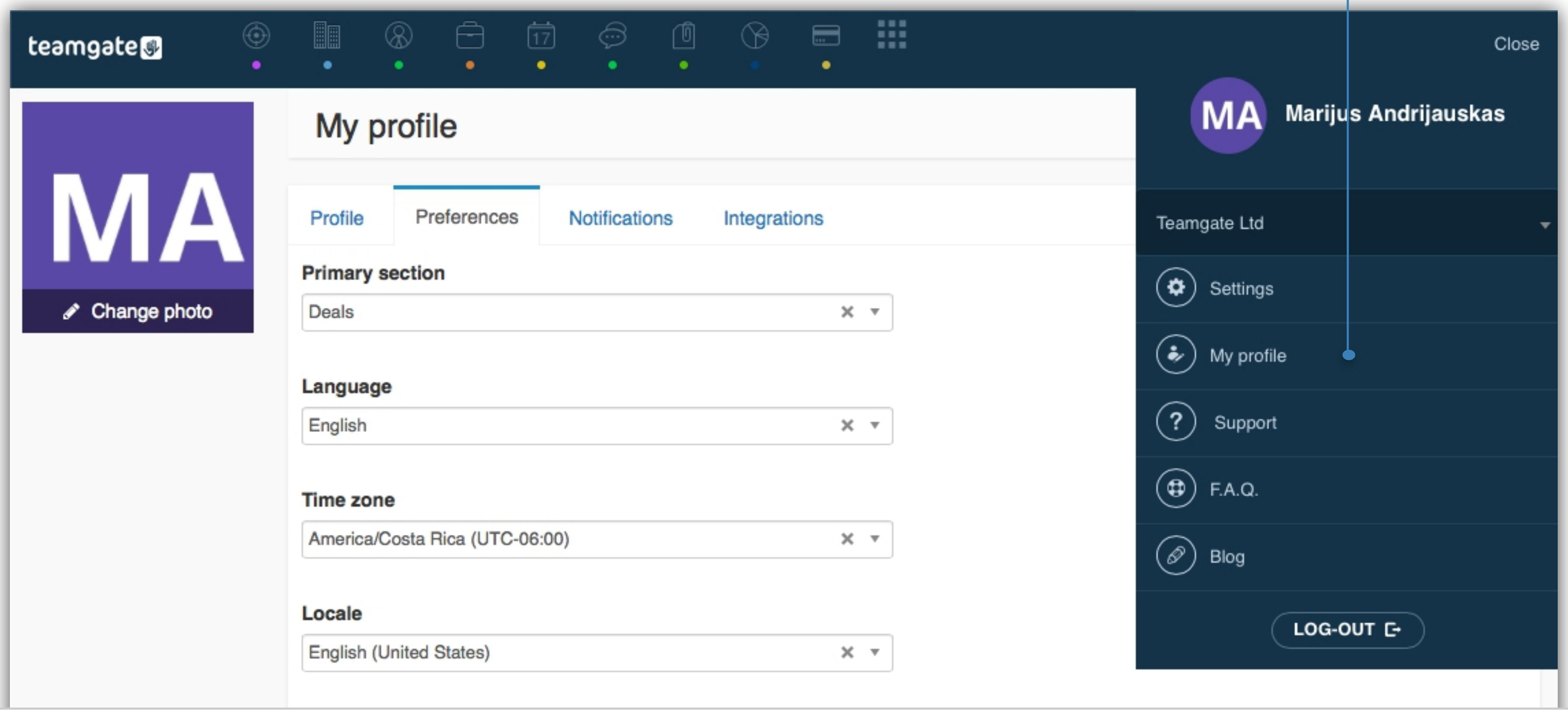


Navigation

My Profile

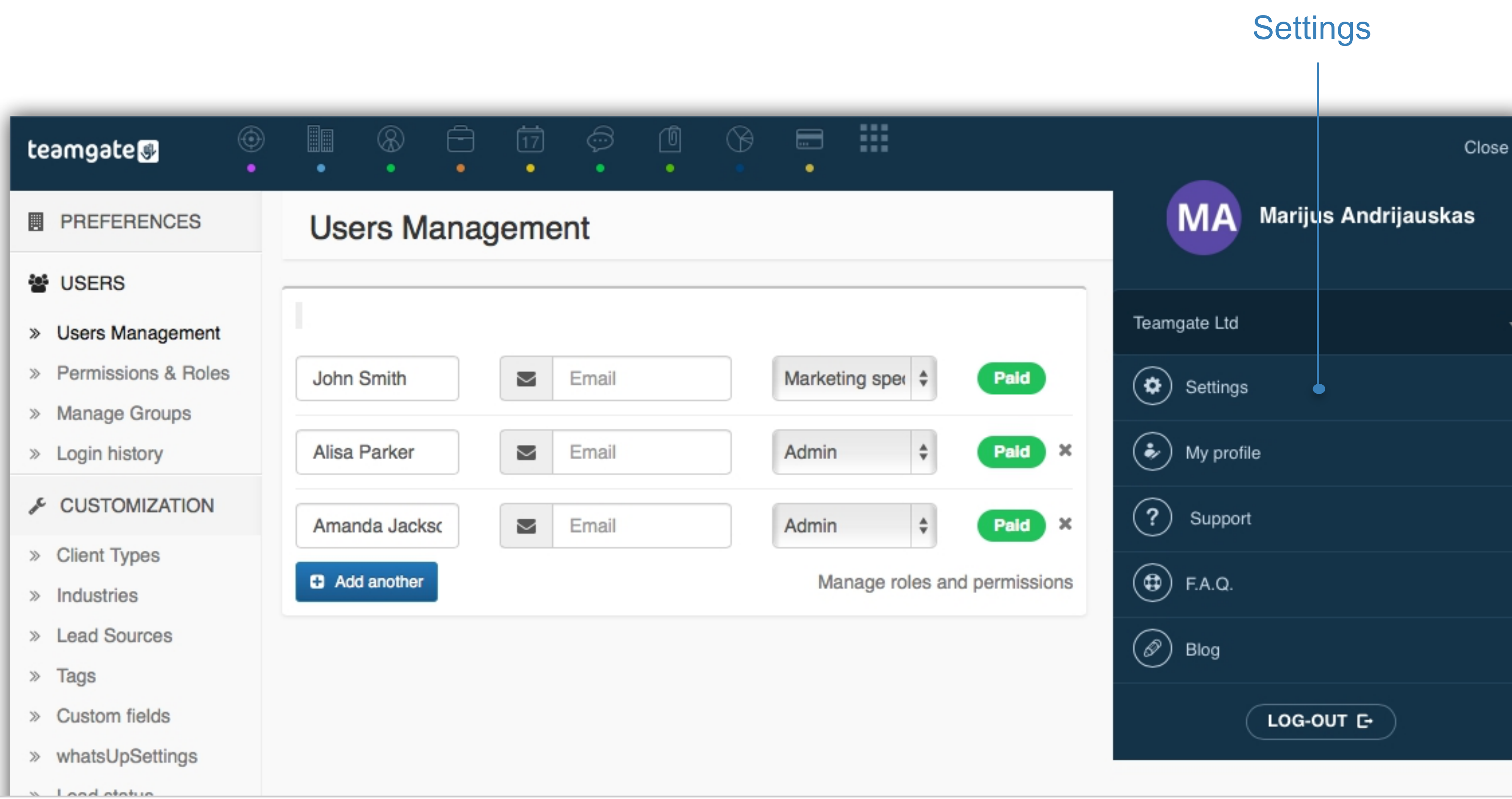
At the top of Teamgate page, click your name icon. From the menu under your name, select “My Profile.” You can set your personal information, change your password, add notifications or set personal preferences in your profile settings.

My Profile



Settings

“Settings” is a place to manage your Account preferences, profile, custom fields and status, tags and much more. You can set up your integrations and manage your user roles, permissions and users as well.

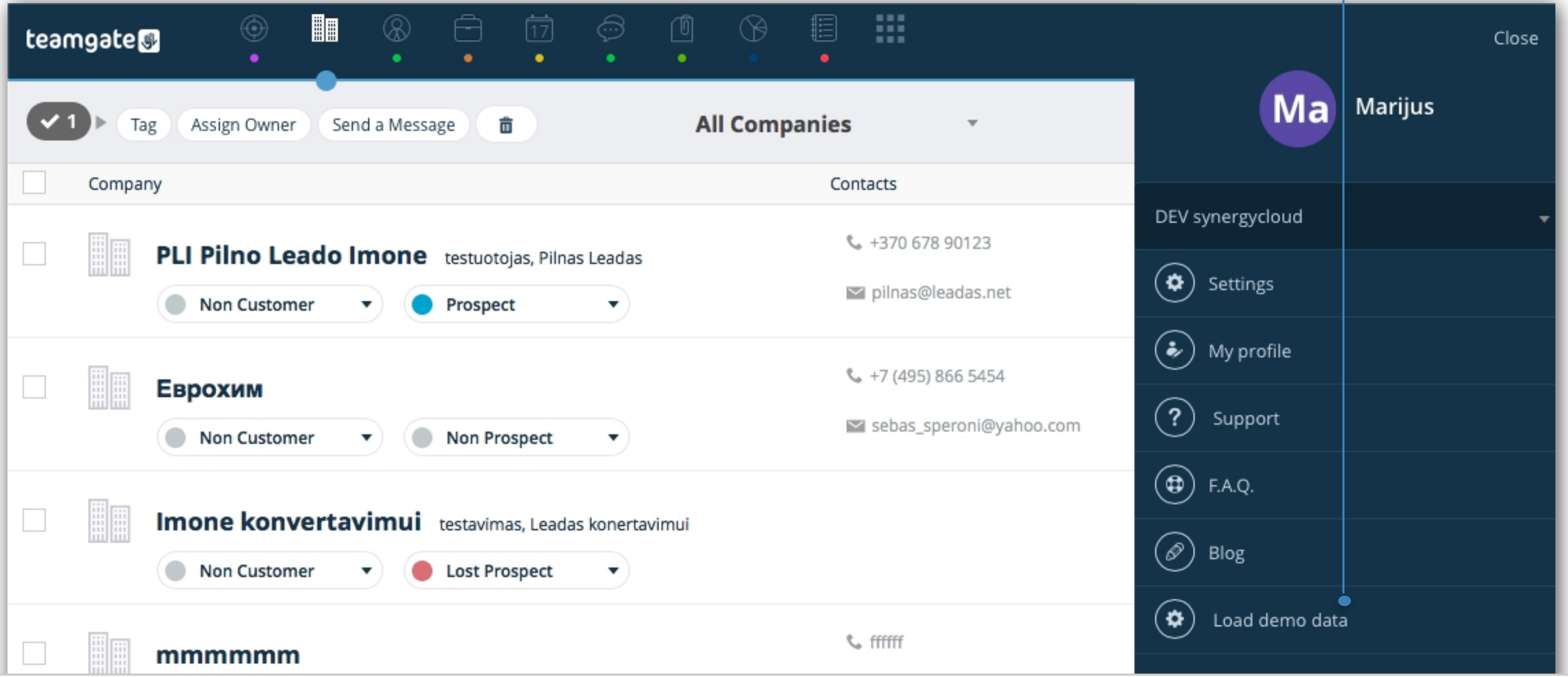


Navigation

Demo Data

When You start the Trial version of Teamgate, application gives you an option to upload demo data. It is made for your convenience, so that in short period of 15 days, you can experience all that Teamgate has to offer. There is no need to fill in huge amount of data, simply use pre-made materials. At any point of trial period, you can delete demo data and start entering your own information, or upload it from your own database.

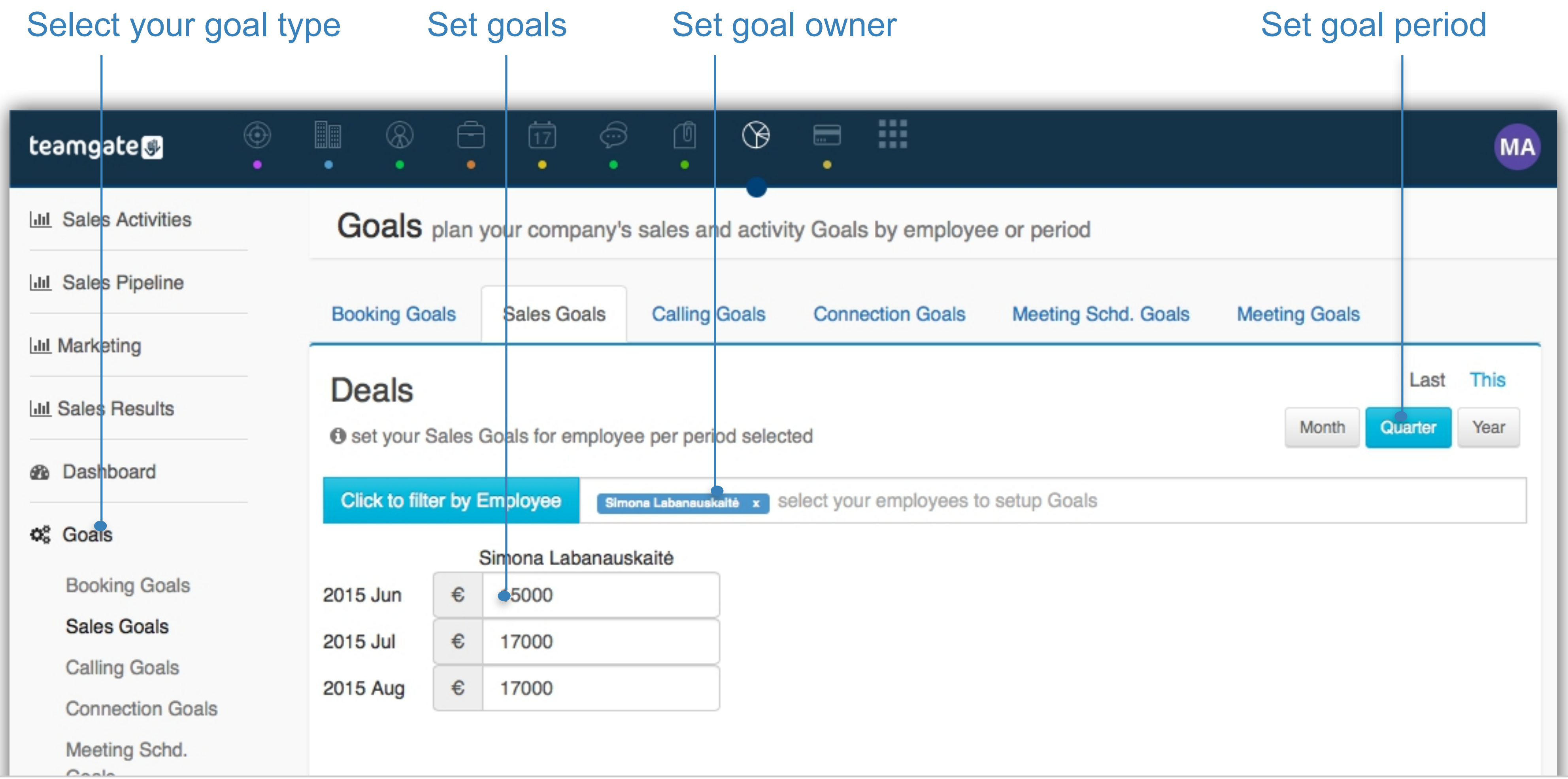
Load and remove demo data



Navigation

Goals

In order to get the most out of Insights and Reports, you can set up Activity and Sales Goals for your team. This will allow you to track how you and your team members perform toward the set up goals. Visible Goals and Activity Indicators not only boost motivation of the team, but also allow each team member to evaluate themselves individually.
In order to set Activity and Sales Goals, go to Insights and choose Goals on your left hand side from the side bar.

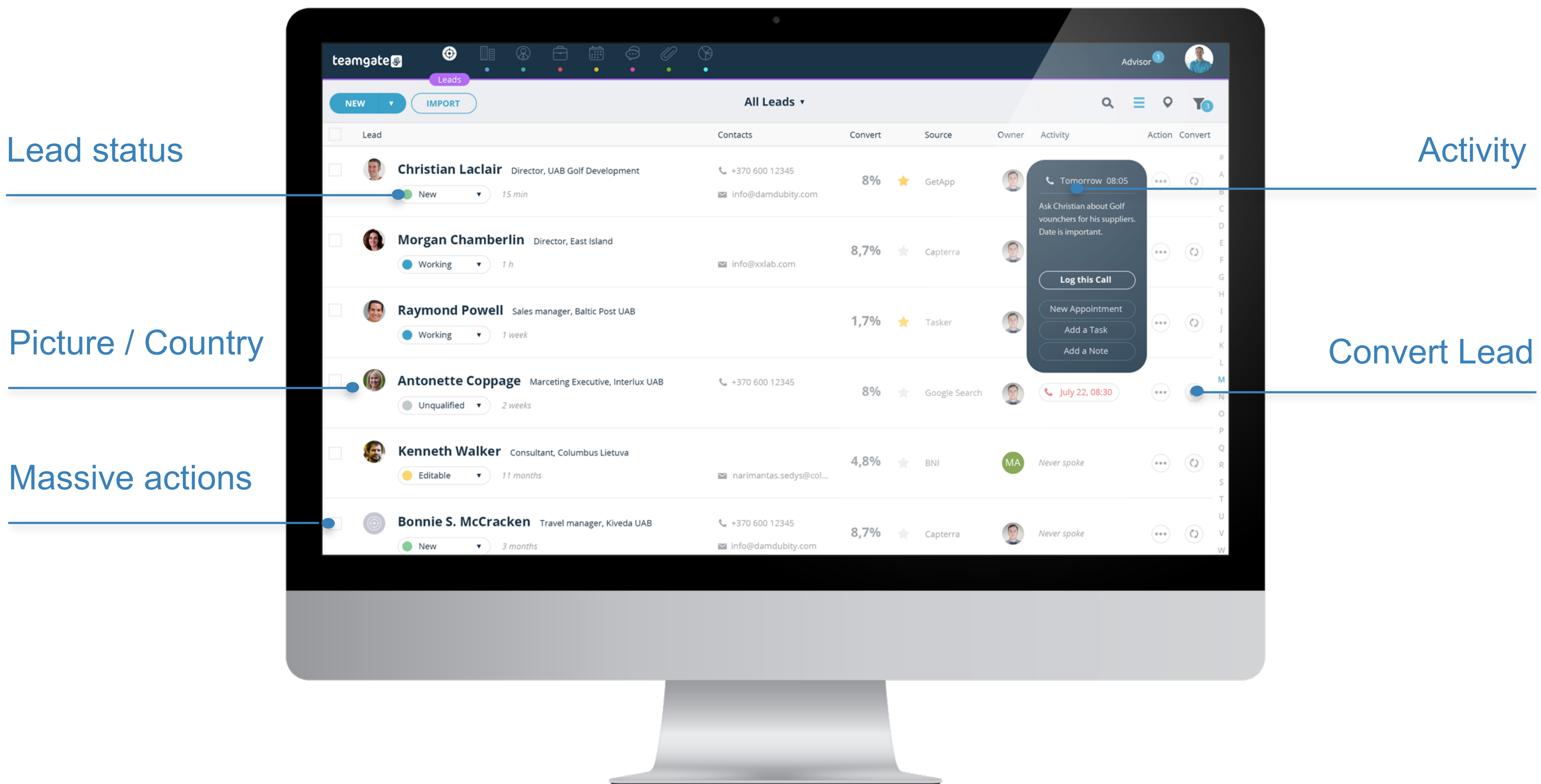


Leads

What is a Lead?

A Lead is a person, company or business opportunity that has not been confirmed and added to your Sales Pipeline yet. Usually, leads come from personal networking, seminars, trade shows, purchased contact lists, ads and other channels.

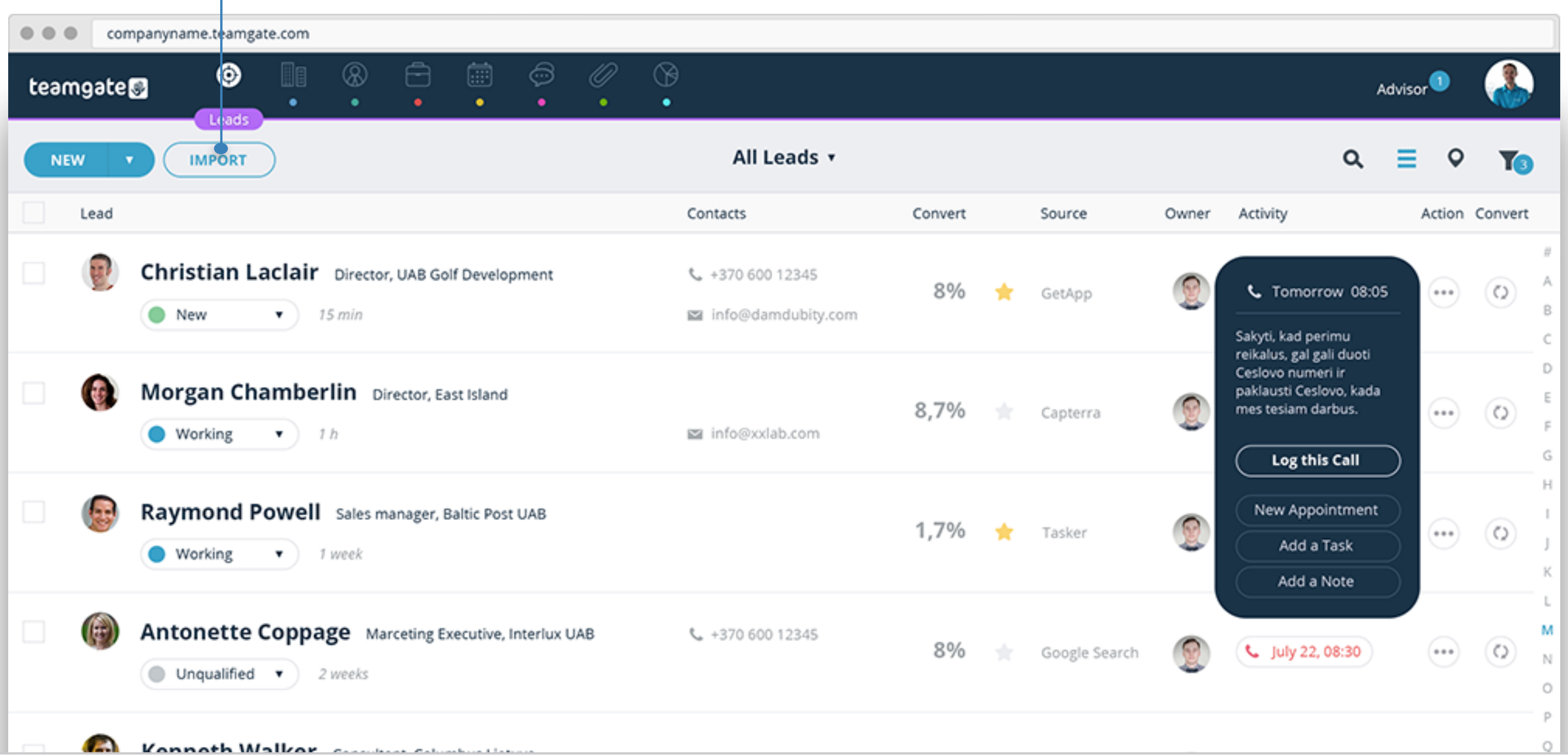
When lead fits within your requirements and becomes qualified, it will be converted to a contact and to a deal. A list of your Leads can be found by clicking on the (icon) in the main menu at the top of the application.



Importing Leads

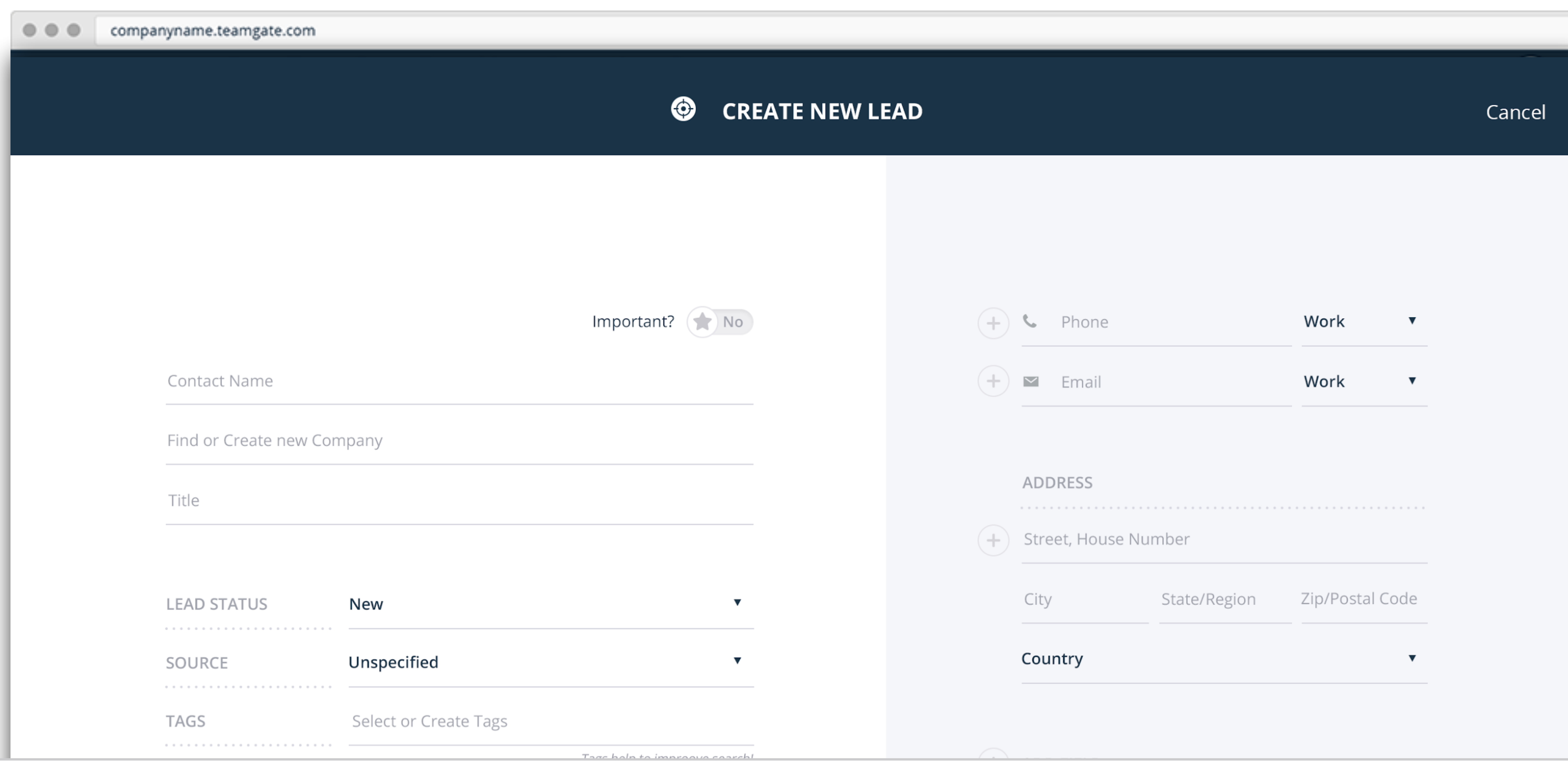
You can import new leads directly in Leads section. To import leads, simply press “Import” button and follow instructions. Leads can be imported from CSV or XLSX file.
Teamgate also supports importing from third party applications like Google, LinkedIn or Mac Contacts.

Import leads



Adding a Lead

You can add a new Lead manually by pressing “New” in Leads section and filling in fields with required information. Keep in mind, intelligent software will warn you immediately, if data you entered already exists, so you are protected from duplicate records.



Converting Leads

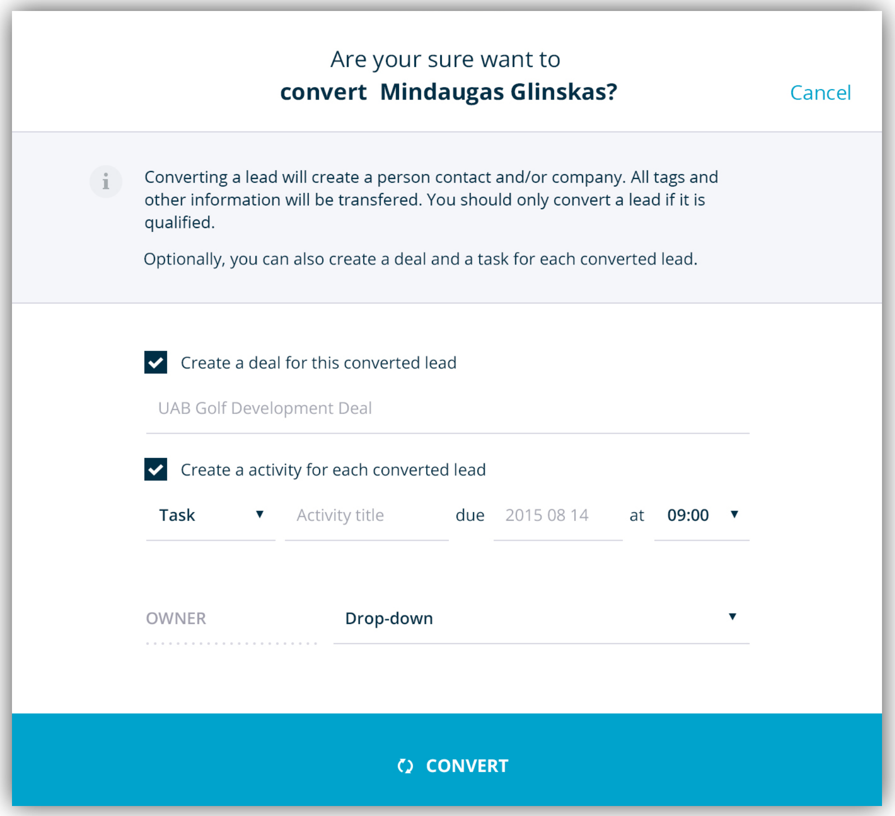
When a Lead is qualified and ready, you can convert it to a Deal with associated contact to it. Converted all Lead’s history will be transferred as well.

To convert a Lead, you have several options on how to do it just by single click:

- **Convert the Lead to a Company and/or Person, without any action.** This option means you transfer your Lead with all its information included into a Contact. And since there are no actions planned yet, you can start planning your activity later.

- **Convert the Lead to a Company and/or Person with action planned.** To convert a Lead, you can select the checkbox to add an optional action like task, call or other reminder due date. The new task will appear in Contact’s card, in list and in your calendar.

- **Convert a Lead to a Company and/or Person and create new Deal for this Lead.** This option will create a new Deal for your converted Lead. You can add a name, Sales Pipeline and stage for this deal. The associated Contact will be seen as “Prospect” on the list.



Other lovely details

Benefit for business which do export (Flags)
Companies that operate with clients from different countries will find this additional feature very helpful. There is no need to enter your Lead's card to figure out its country of origin, its flag is located next to the name of a Lead, so you can great it in its mother tongue!

Source & Conversion Likelihood
The source column is created for your benefit. You can assign where the Lead particularly came from, for example: trade show, networking event, online registration etc. We constantly strive to provide you with more advanced forecasting. Thus, based on a source of the Lead and past interactions with it, software will calculate a likelihood of that Lead converting into a Deal in "Convert %" column.

Manage a Lead
Manage and customise your Leads the way you manage your business. Select **Status** for your Lead: New or Unqualified or add any status you usually use for your Leads nurturing. All unqualified Leads can be recycled and processed again. Add a **Tag** to your lead to remember where the Lead came from or note other specific information. An option of the "**Quick saving"** allows you to quickly save & add new Leads.

Why is it important to manage your Leads?

Leads qualification is the very first step towards the final sale. After receiving a Lead you enter it as a Lead and start processing its potential. After nurturing, you decide to convert it into a Contact. If the Lead is not qualified, you can “unqualify" it and the Lead will disappear from your active Leads list. Unqualified Leads can be recycled and processed again at any time later.

“Lead management allows to keep your database organized and clear from useless contacts and prevents the mess in your contacts lists.“

Teamgate wisdom.

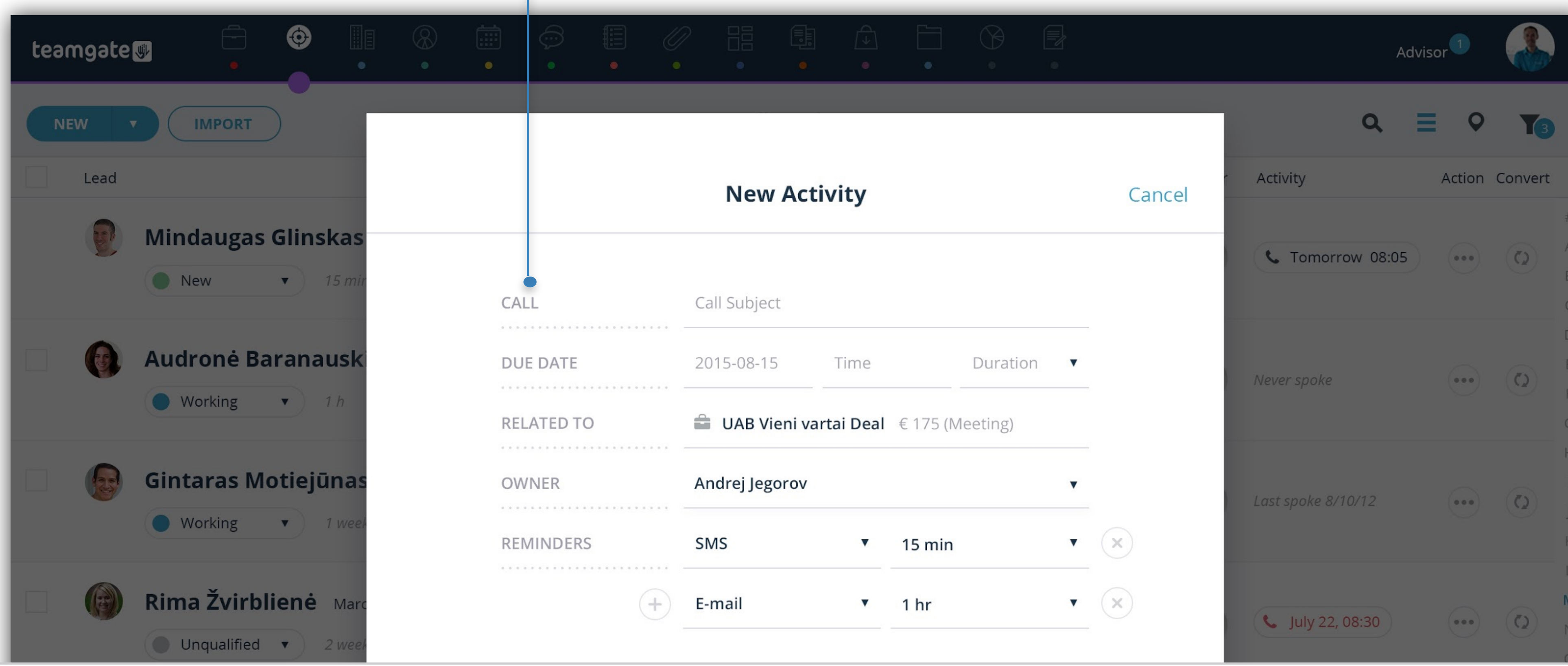
Organiser

Organise Your Day Efficiently

Adding activities to Deals allows you to track actions taken within particular Lead, Contact or Deal and highlight what else needs to be done next.

Create your own activity type, see it all in your calendar, track plan your day and receive reminders and notifications of delayed tasks.

Manage your activity types in “Settings”

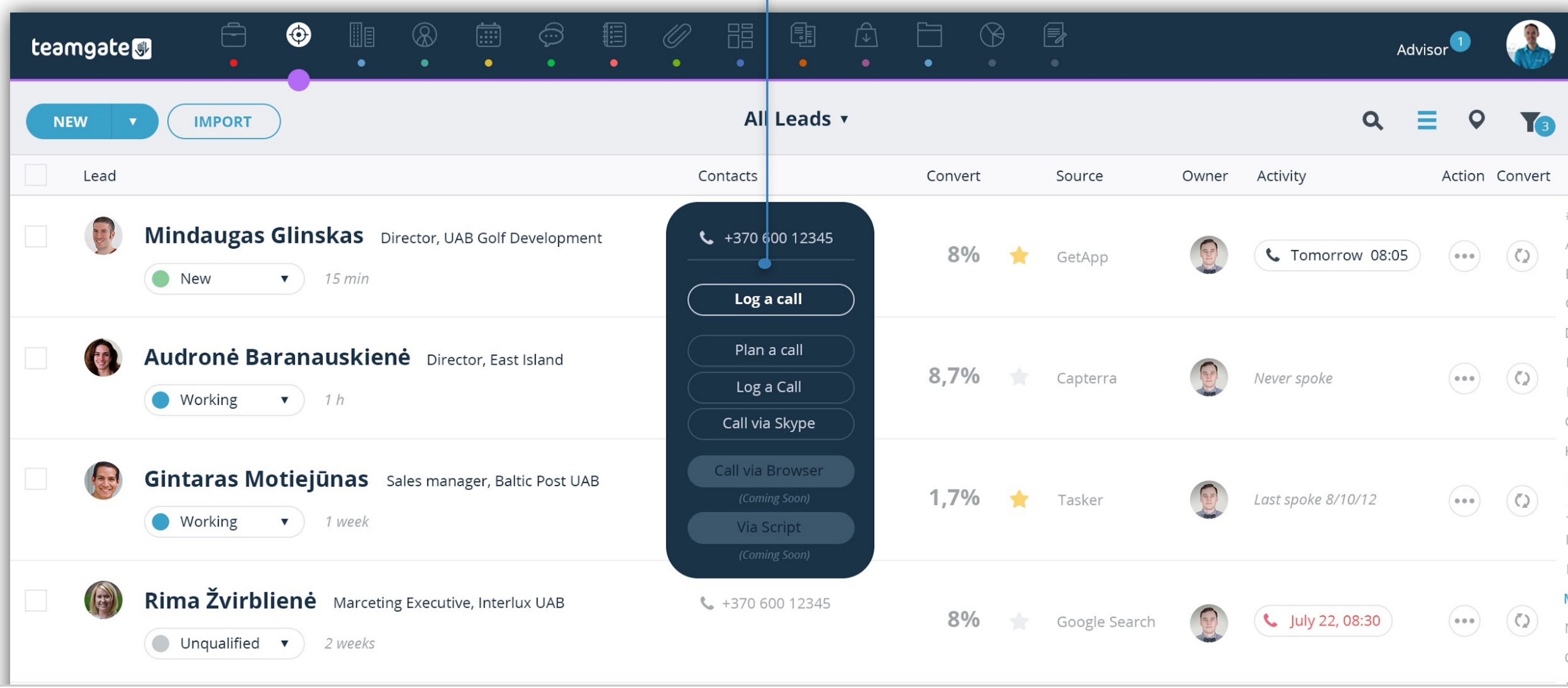


Organiser

Log a call

Log a call to identify whether a Call was successful or not and see the outcomes in analytics. Analytics section will also highlight the records that have not been processed yet, so you can plan your actions immediately.

Click on phone number and “Log a call”

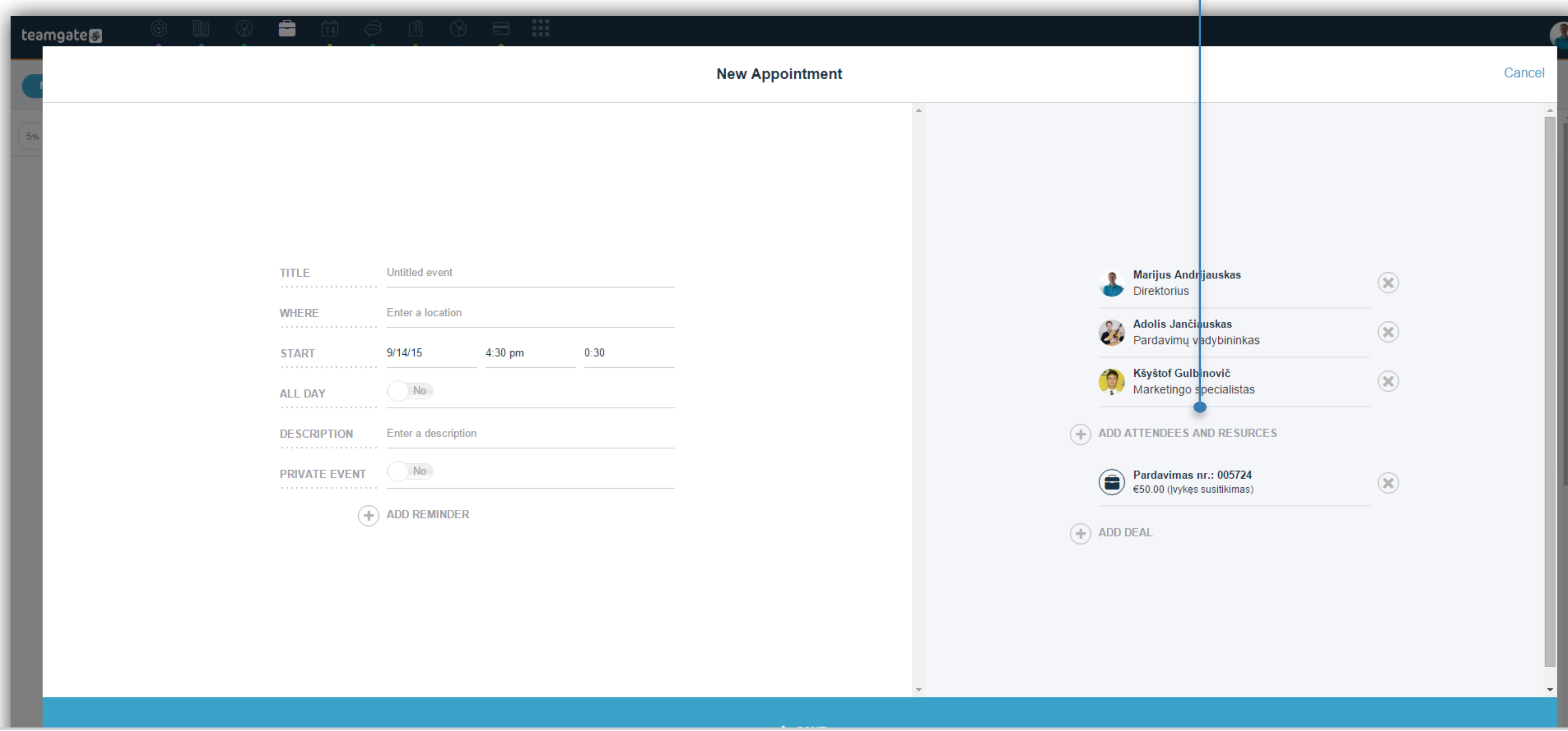


Organiser

Set an appointment

Invite your team members and related Contacts to a meeting. Set the title, location, time and length, add reminders. All new Appointments can be seen on your calendar or in the Contact card, if it is related to it. Reminders and daily schedule will be received by email or by text.

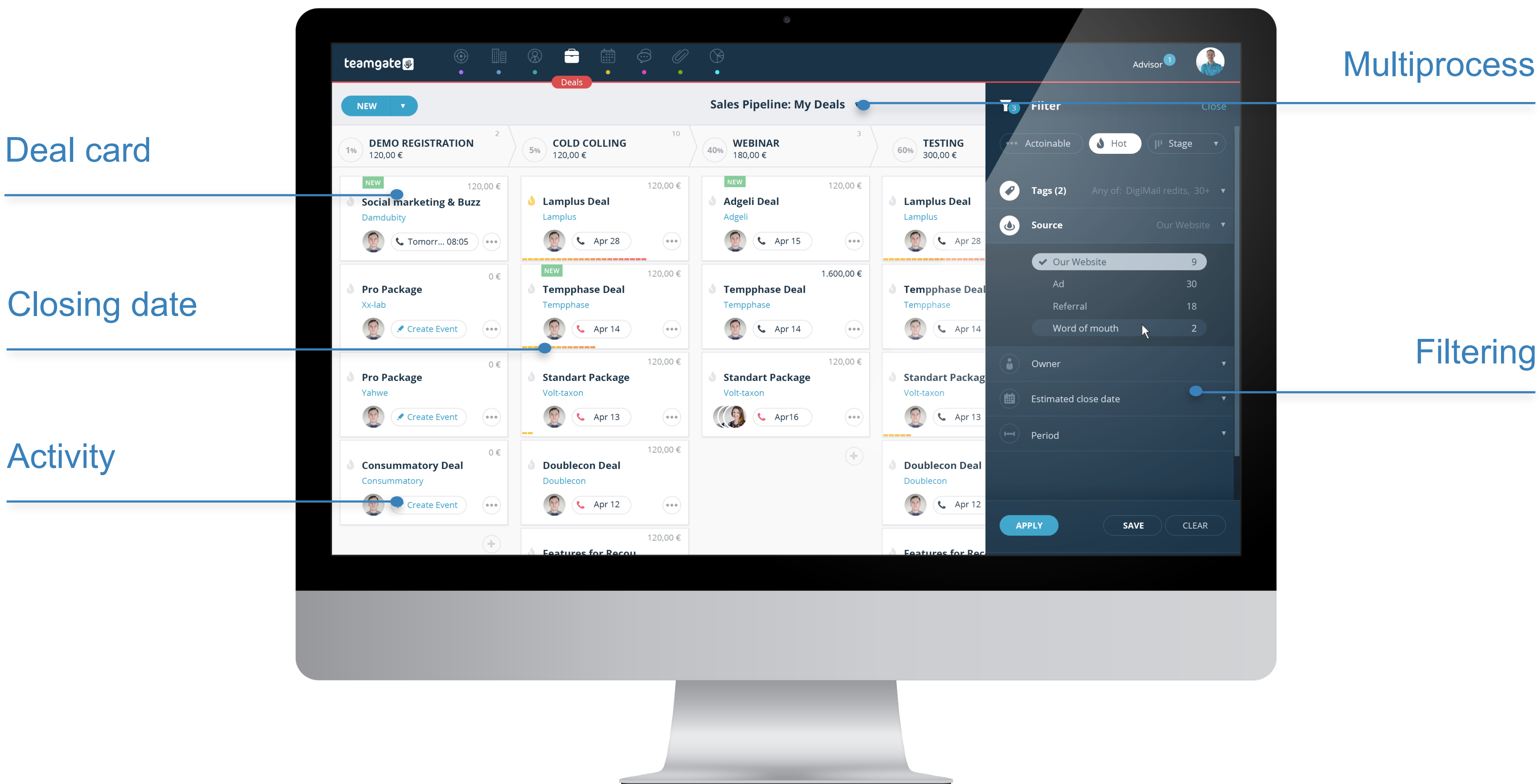
Invite your team or related contacts



Deals

What is a Deal?

A Deal is an entity by which the Journey is tracked through your Sales Pipeline. Each Deal is assigned to its owner or a team. With flexible functions, you can easily filter and manage your Deals or just drag & drop from one sales stage to another. You can see the delay date and if it is likely to be closed. If you want to close the Deal, you can drag it to appearing win/lose line.

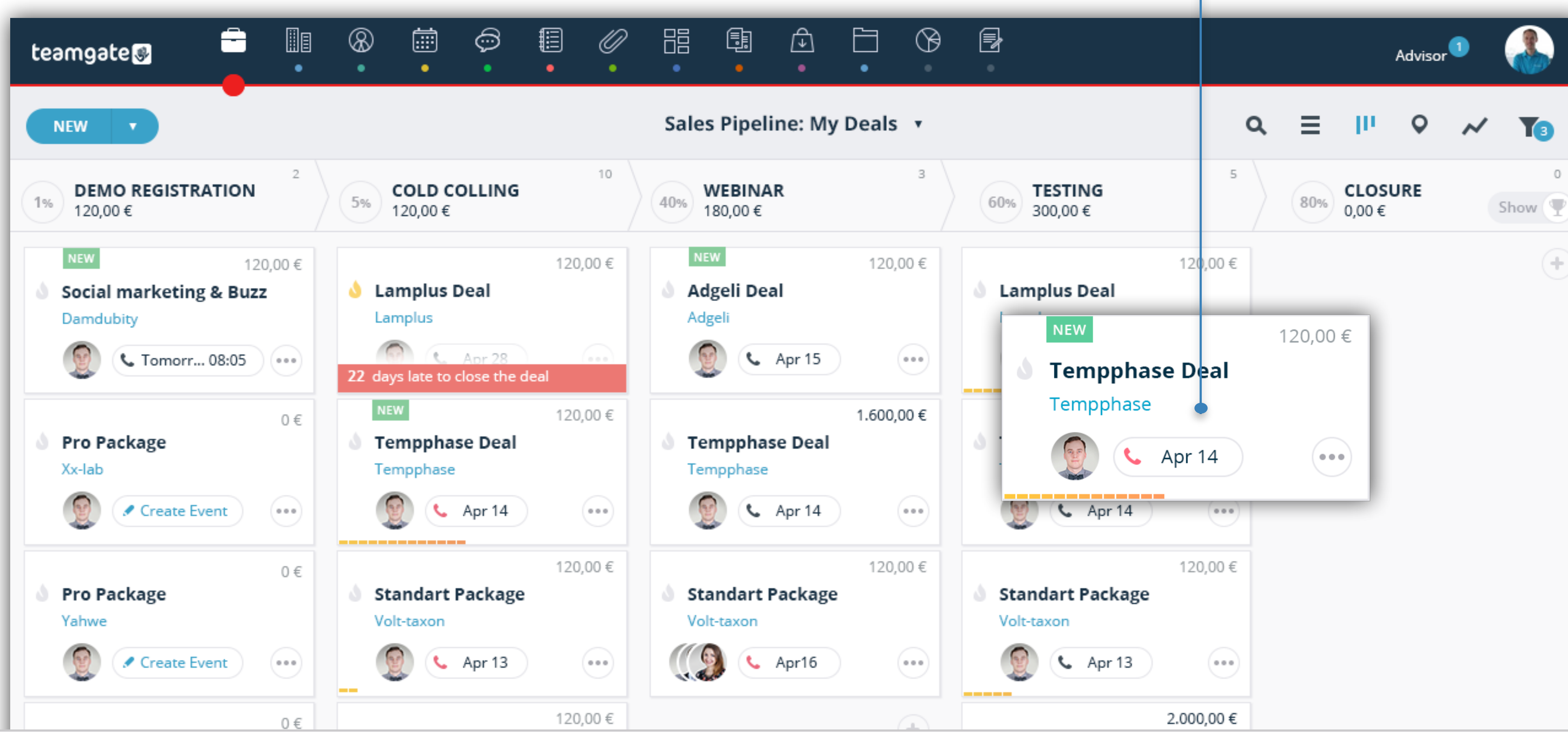


Deals

Sales Pipeline

Sales pipeline displays all your Deals at each stage of the sale process. It also gives you a clear view of your team performance, as well as highlights areas that need an extra push. Also, you can manage more Pipelines at the same time.

Just “Drag & Drop”



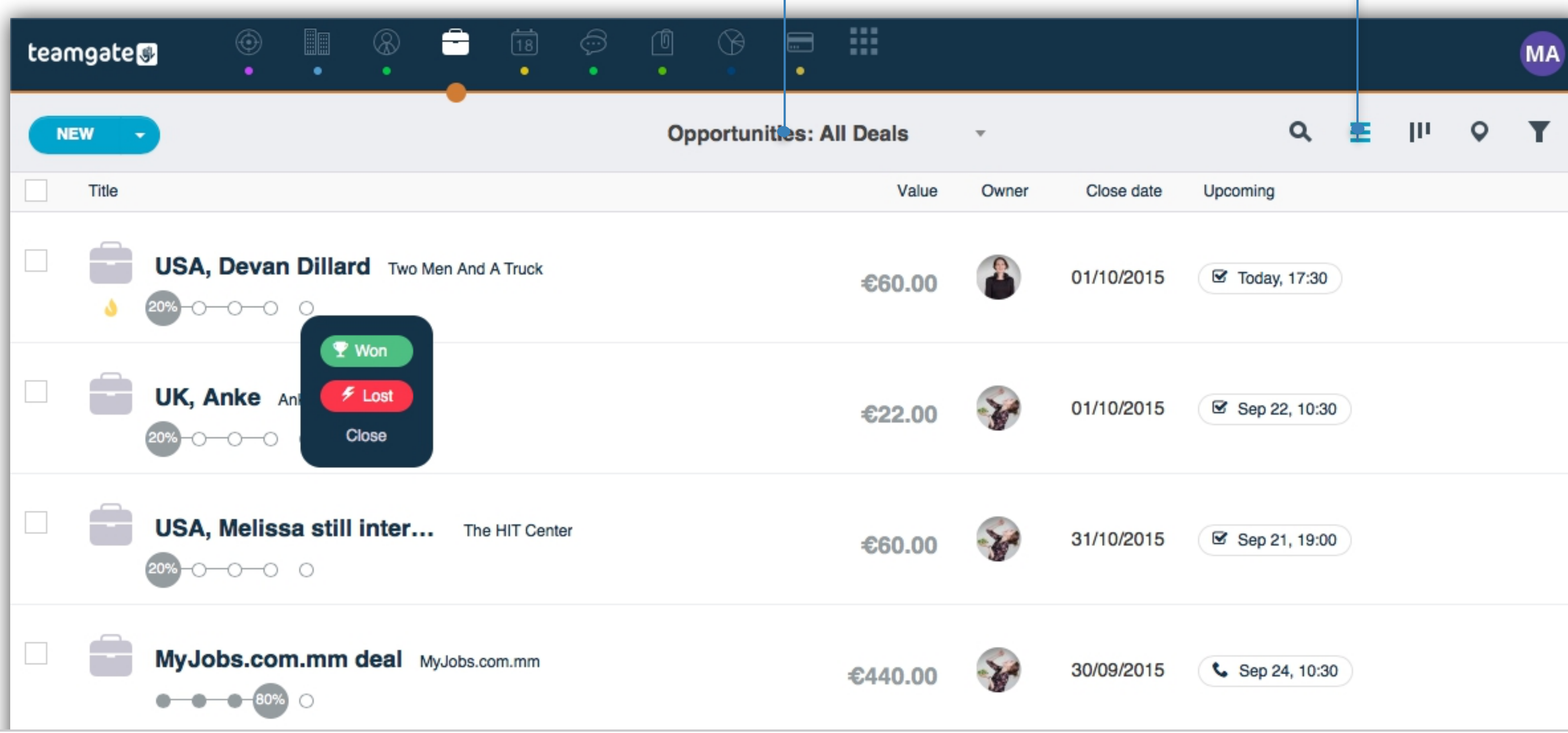
Deals

Deals list

See all your deals in a “List View”, including won and lost Deals. You can plan massive actions, navigate, sort and manage Deals here.
If you are missing some important information about your Deals, you can add some extra fields. Plus, you can add as many sales processes with unlimited stages as you need.

Manage sales process on “settings”

List view



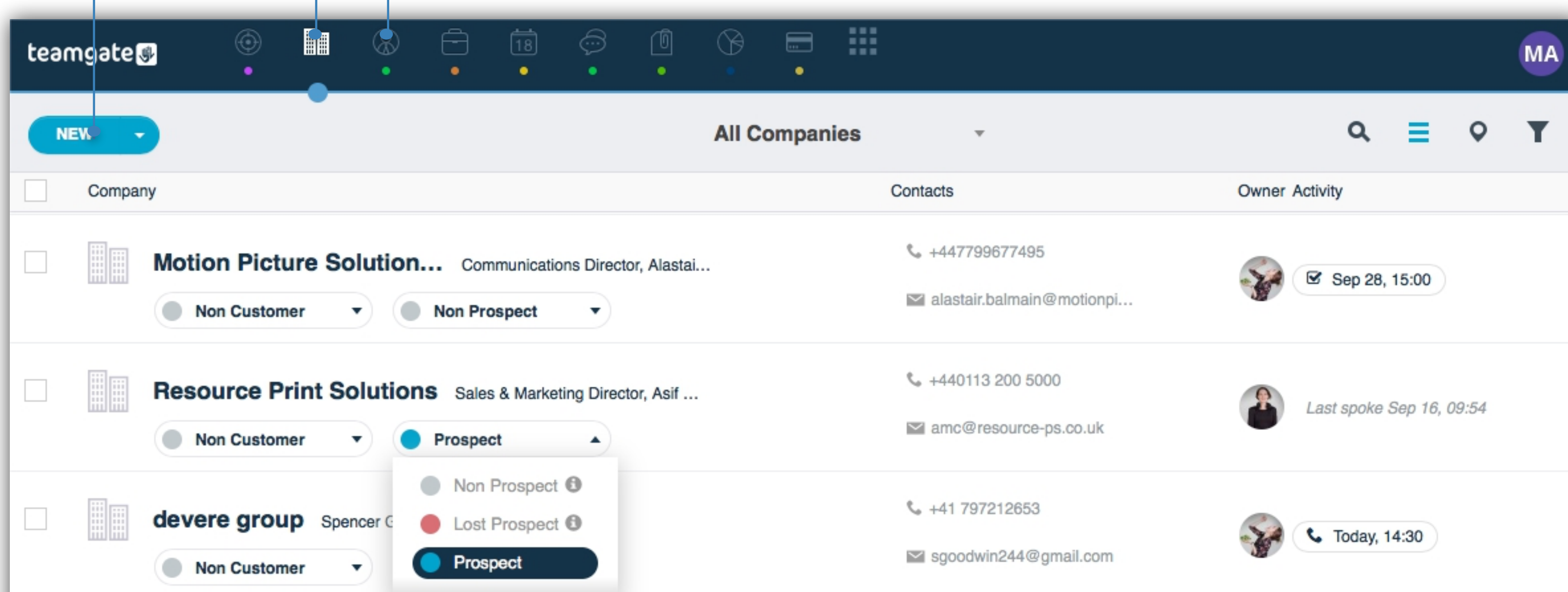
Contacts

People and Companies

You can find two contact sections in Teamgate: People and Companies. Each section holds different type of Contacts, and both are related, too. “Companies” hold all business information, like company name and all information about it. “People” hold individual person’s information, relations, titles and much more.

It is quite easy to add new Company or Person. All you need to do is just to click “New”. Make sure you are not duplicating a Contact, and, if you are, we show you that immediately.

New Companies People



Contacts

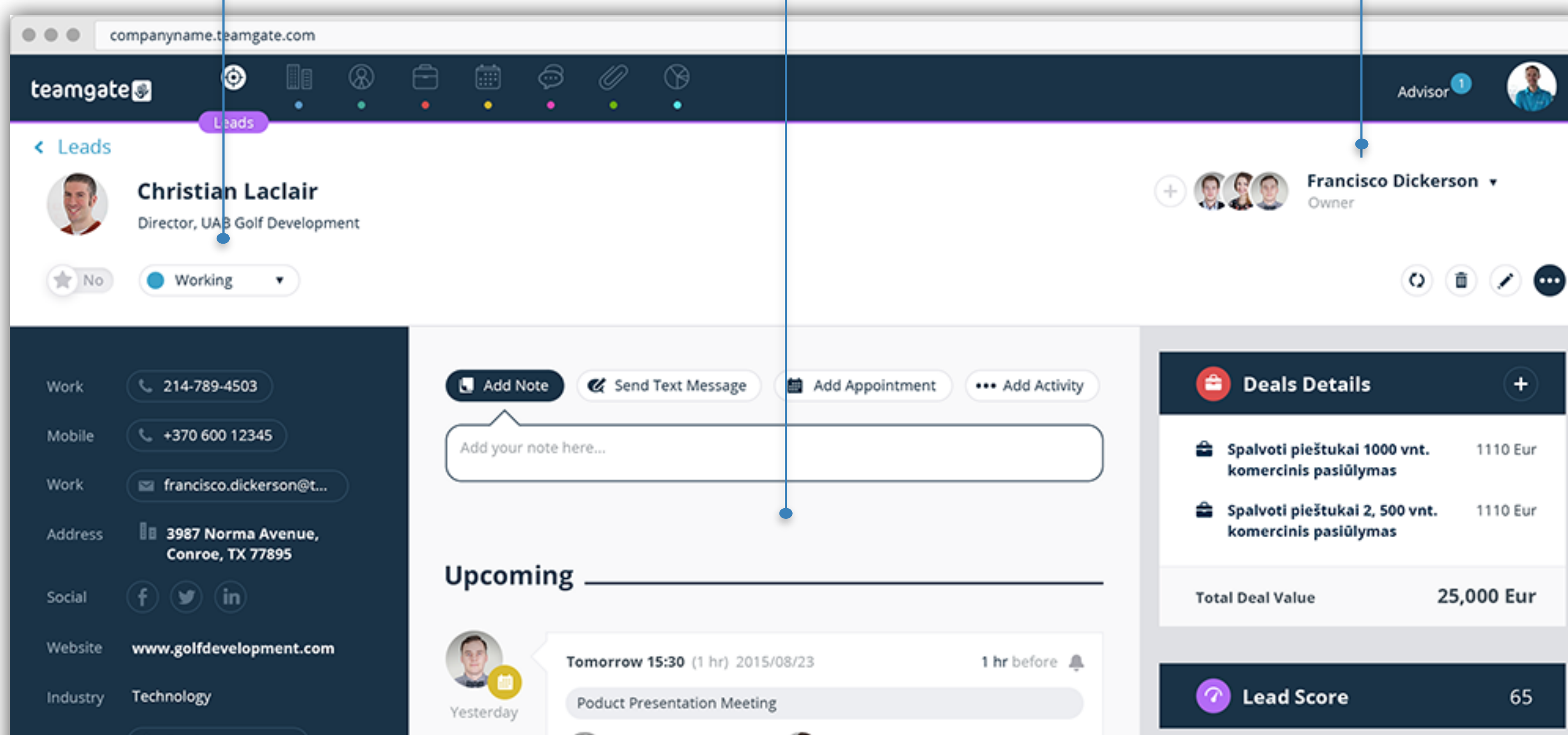
Contact card

Each contact has its own Card, including everything related to it, together with notes, emails, calls, and tasks, upcoming events, history and much more. When lead fits with your requirements and becomes qualified, it can be converted to a Contact transferring everything related to the Contact.

Contact details

Activity and history feed

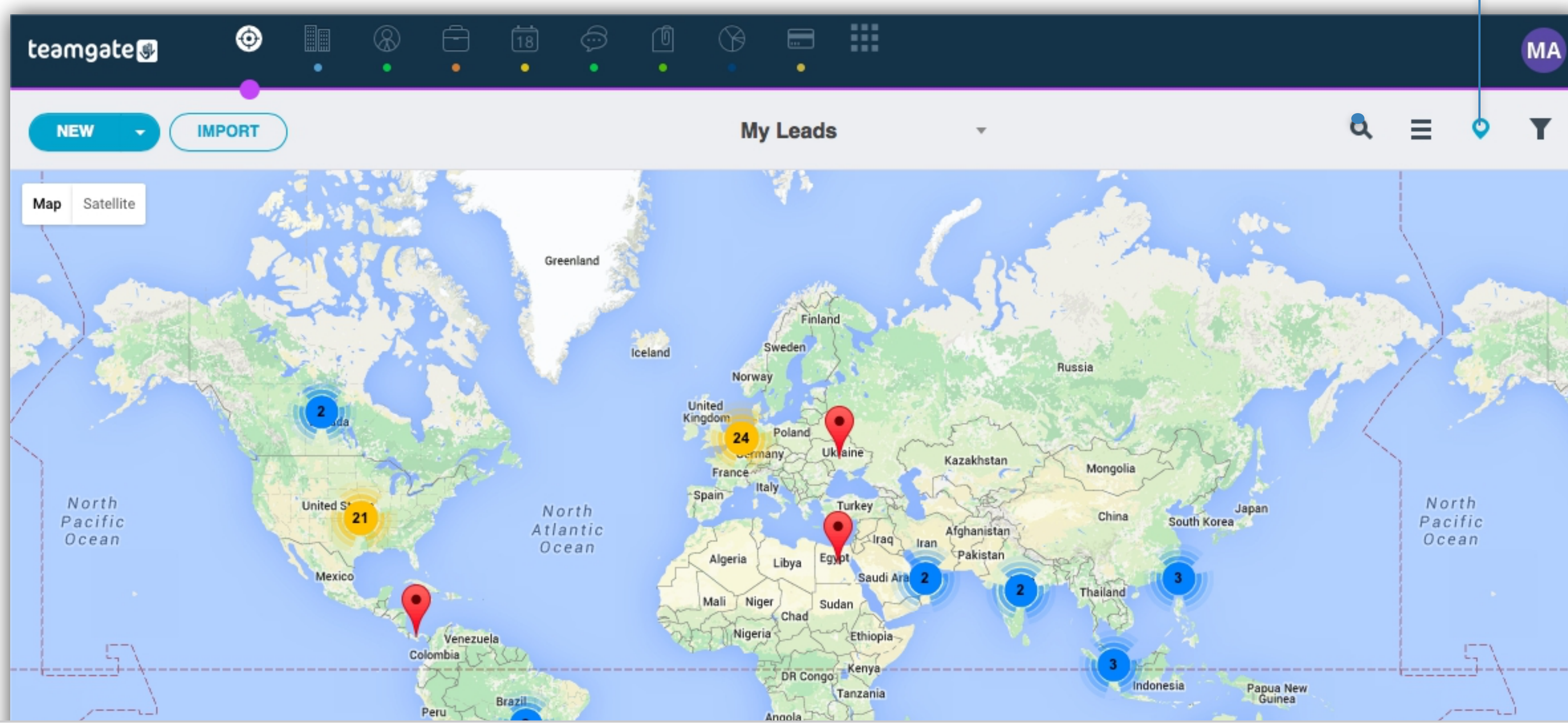
Owner and collaborator



Contacts

Google Maps

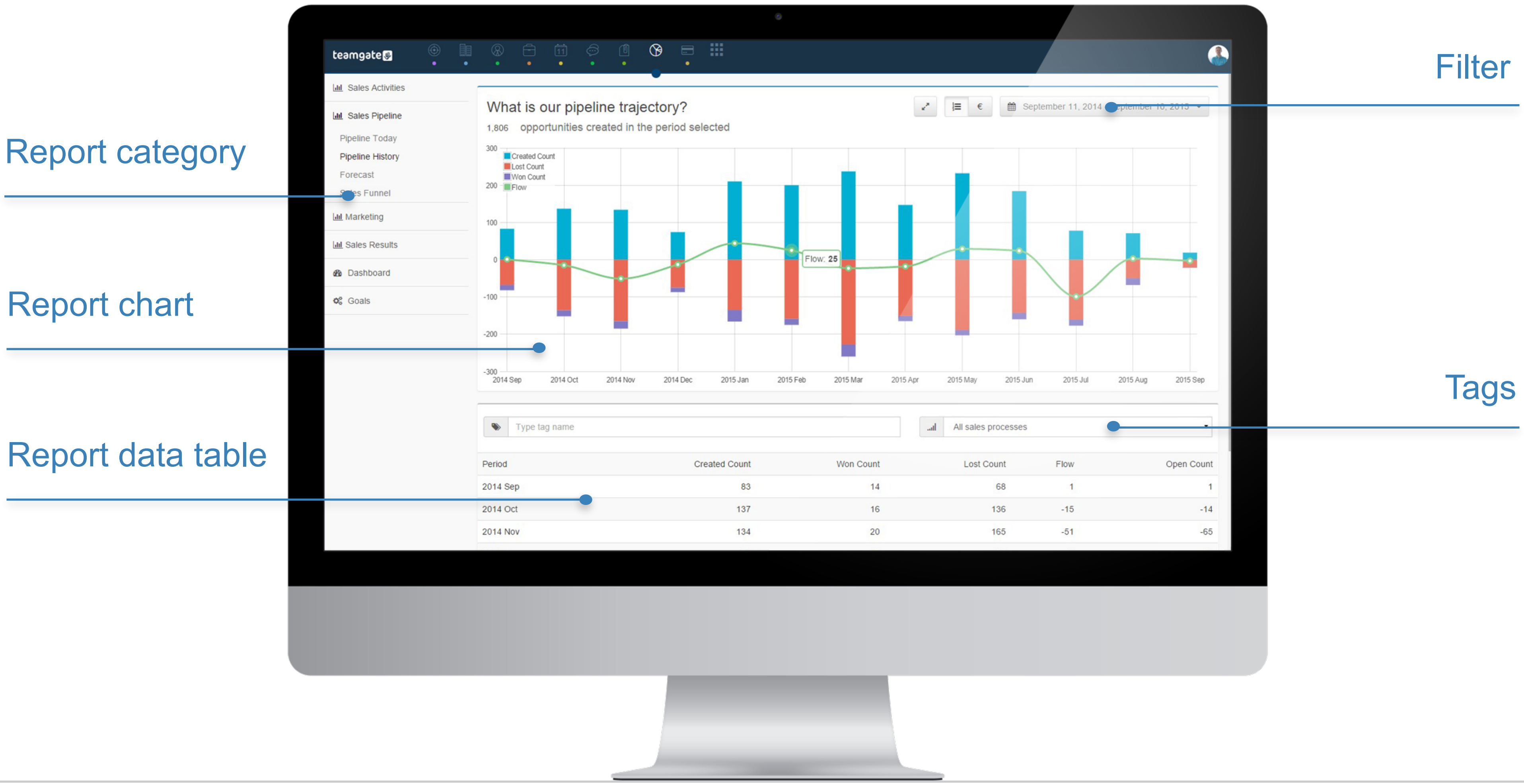
Each contact that has an address appears on the Google Map. So you can see the real picture of your customer's map or Lead's traffic direction. You can click on the icon in the map and see the details of that Contact or you can go directly to the Contact card for more information.



Insights

What is Insights?

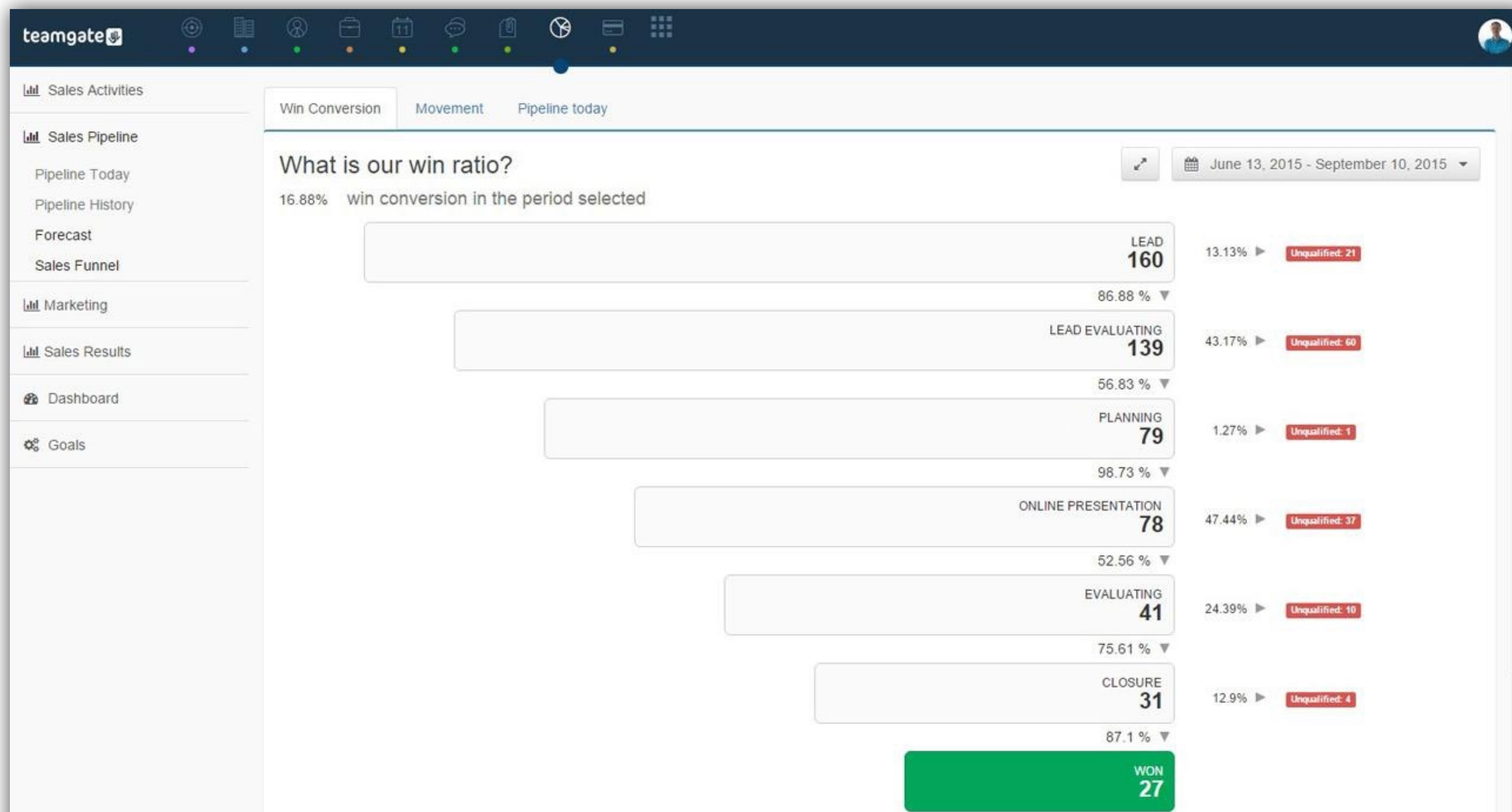
Data driven intelligent reports provide sales managers with a real time image of their business. By breaking down every single angle of the sales process, manager is able to highlight that particular business areas that require the biggest attention.



Insights

Sales Funnel

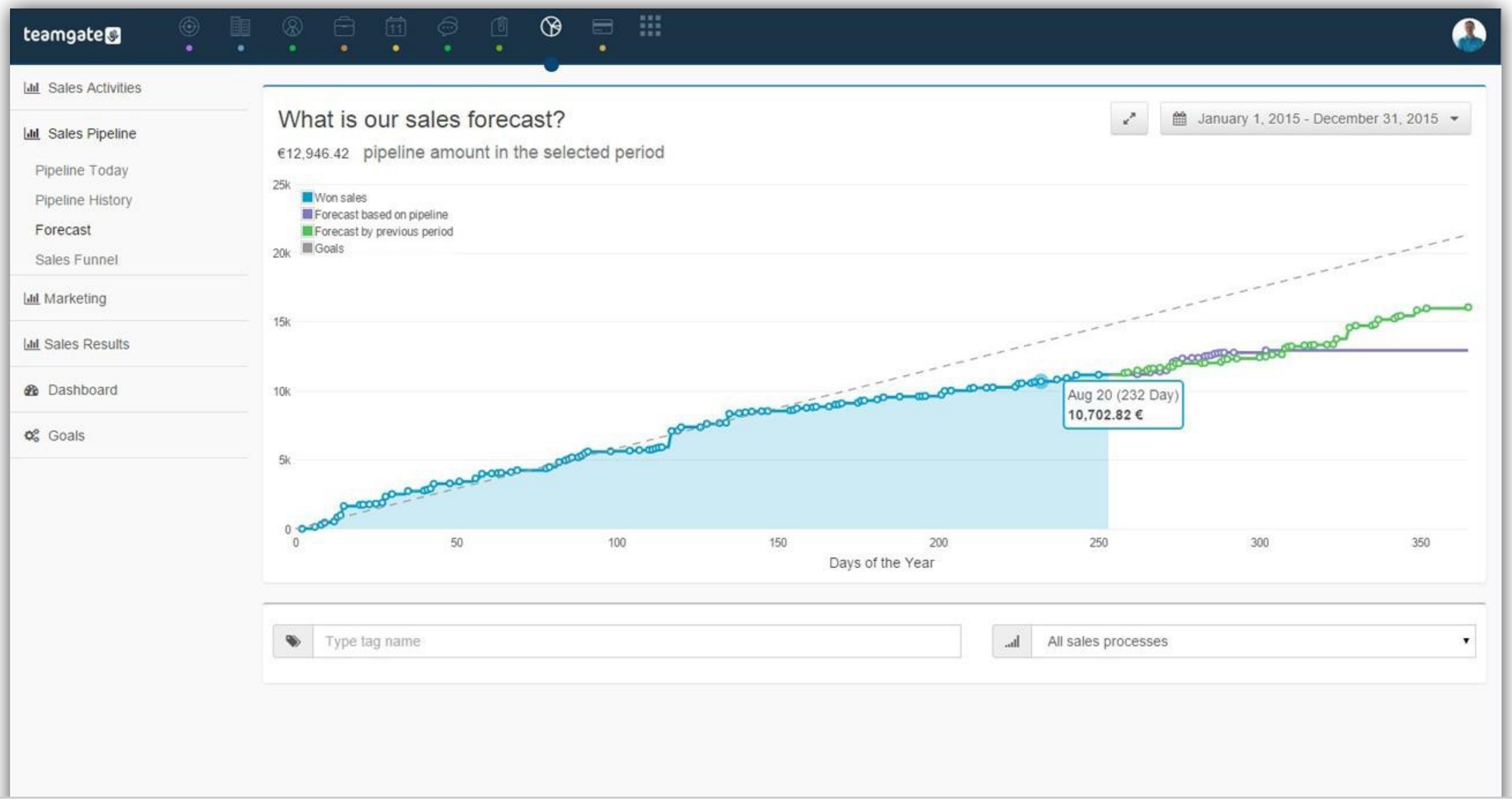
It is a great way to visualise the process of Leads becoming Customers. Sales funnel provides a clear view of sales opportunities available to your sales teams, including number of prospects, total revenue which can be generated by every Deal, flow and win rates.



Insights

Forecasting

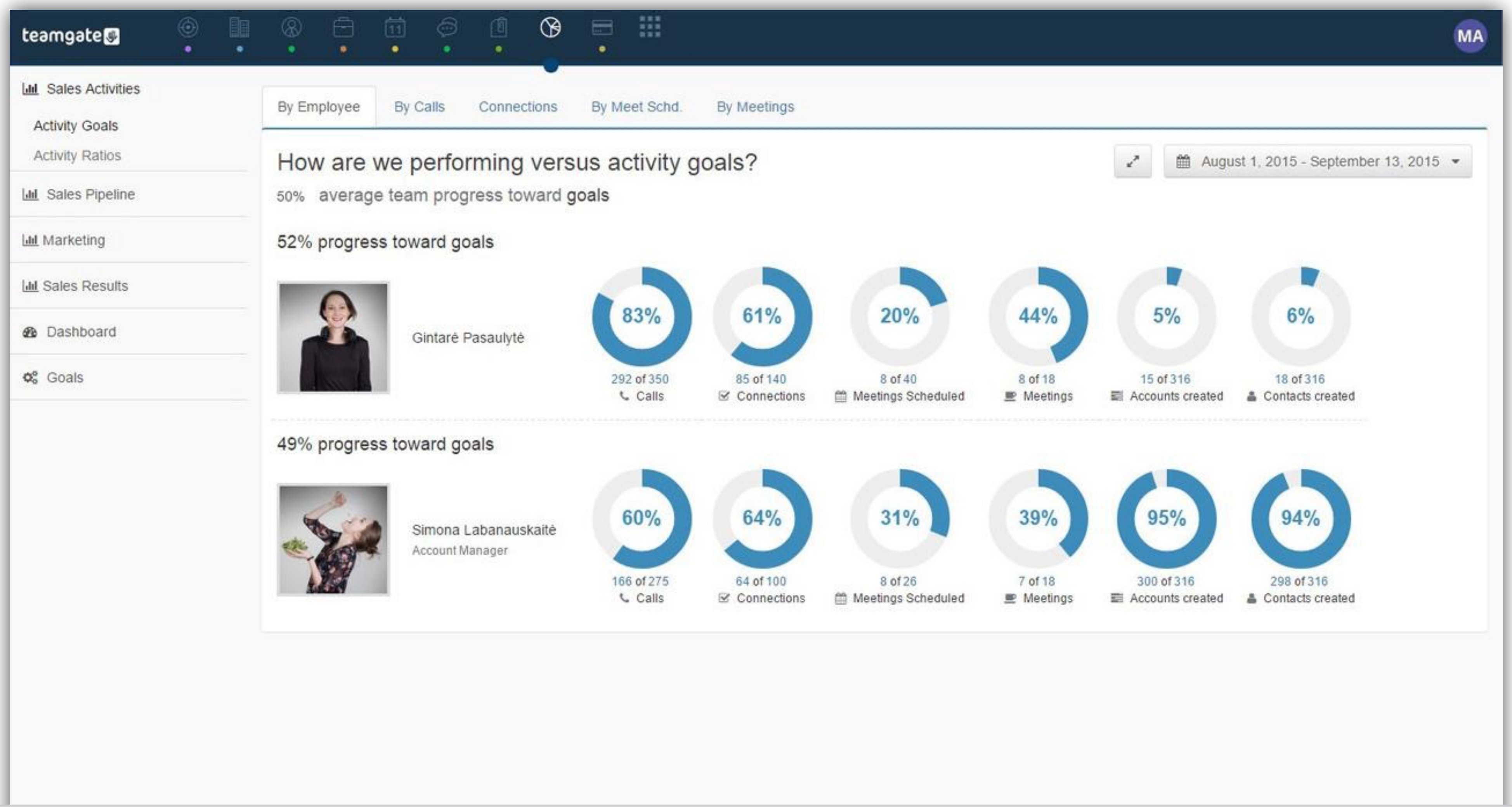
Sales forecasting means picturing a long-term and a short-term sales performance of the company. It is based on success rate of a deal closure at the actual moment in addition to its past sales data. Forecast can be compared to the Goal you set.



Insights

Activity Goals

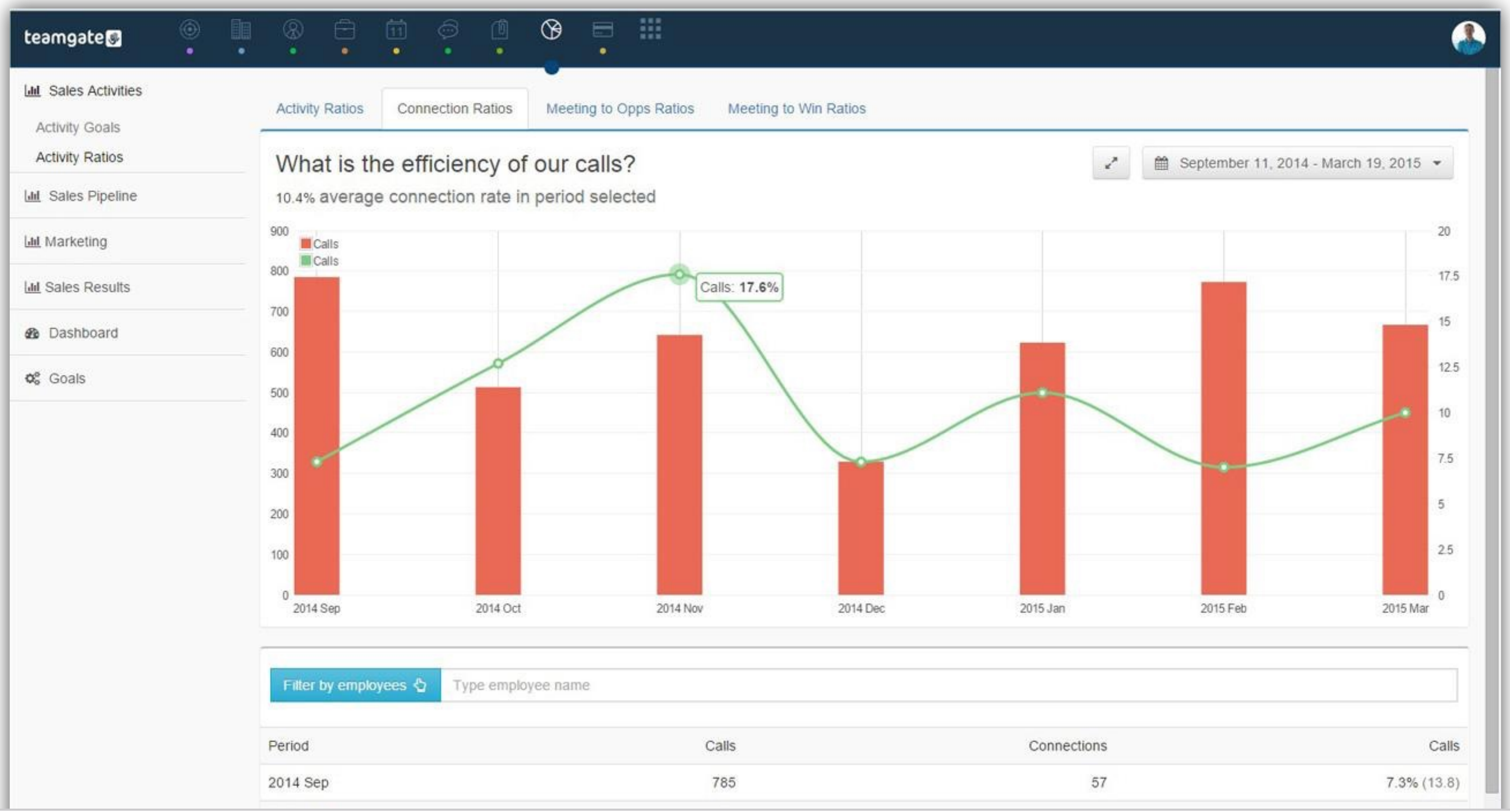
Stay on top of your activity indicators. Individual set up goals will help you to evaluate your own performance and compare it with the performance of your colleagues. No more daily encouragements from your manager. Boost your motivation and stay on top of you planned duties.



Insights

Activity Goals

Activity reports are very much valued by the salespeople and executives. The ability to set Goals for various sales activities and compare it with day-to-day performance allows executives to constantly track performance of their teams. In addition, salespeople can compare their activity with their Goals, too.



Teamgate CRM - easy to use, hard to beat.