

WindsorBusinessHub

windsorbusinesshub.com

Setting up BaseOneCRM Account

Welcome! As Windsor Business Hub Network Member your business has access for two users to our own Customer Relationship Management System BaseOneCRM. A complete and powerful all-in-one sales platform designed to make your sales team more productive and your customer interactions more meaningful. By centralizing all contact data, leads history, and tasks into a single, intuitive interface, it eliminates manual administrative work and gives you full visibility into your pipeline. BaseOneCRM allows users to track and sort deals through customized sales stages, offering visibility into the revenue pipeline.

To start using the CRM system here are the steps to follow.

Choose the best account type for your business.

Individual Account

For independent salespeople and small businesses.

Freelancers, consultants and for building "personal" sales pipeline independent from other salespersons but sharing with printed/pdf reports. Recommended for individuals and small business with small number of independent sales agents

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Corporate Account

For small businesses, sales departments and sales networks.

For sales departments or organizations where a main account would be creating additional sales accounts and/or additional manager(s) and view department pipelines without interfering with individual accounts. Support for more than one sales manager. Recommended for teams of three or more sales agents.

For Individual Account

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If you choose individual accounts, each sales account will be independent, any additional account you add to your business will be independent. And each new salesperson account will need to be created by themselves. To create individual accounts use this link:

https://www.windsorbusinesshub.com/baseonecrm/create_individual_account.php

For Corporate Accounts.

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If you choose a corporate account, the subscriber/main manager account will be able to create additional sales or managers accounts. Your business will be able to assign new accounts in a centralized process. To create a corporate account use this link:

https://www.windsorbusinesshub.com/baseonecrm/create_corporate_account.php

Training/Tutorials in YouTube @NoxtromTVBusiness

Take the free training/tutorial in YouTube @NoxtromTVBusiness using the latest playlist BaseOneCRM Version 4.6 Training/Tutorial in this link:

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<https://www.youtube.com/watch?v=HeP8tYWh-QE&list=PLaAHJYsgcfLaGoNt6OJaIU5UPJ9I8k-yB>

Or go to YouTube and search for @NoxtromTVBusiness channel playlist and select the training BaseOneCRM Version 4.6 training.

Access your account(s) for the first time.

Once you finish the training you can create your account(s). The CRM Key is your way to access the system for the first time and reset your password. Verify your information and if you need special training Windsor Business Hub Network provides free workshops to members on the use of our Customer Relationship Management System BaseOneCRM.

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Extending your salespeople workforce.

If your business requires more accounts, send an email to us requesting more accounts. You will receive a link where you can add the additional accounts and make a payment. The prices for additional accounts are published on the web site.

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Your own “Sales Accelerator” !

Before a thirty days trial account expires, contact customer-service via email to let us know you want to keep your accounts and we will remove the 30 days limit and the duration of the account will be linked to your membership (“Network”, “Sponsor” or “Partner”) at Windsor Business Hub. “Community” members will be linked to the start of the creation of the account.

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Questions? Contact us at windsorbusinesshub.com — We're here to help you grow.