CRM-AMS

Quick Start Guide

LEGACY

Legacy CRM-AMS — Quick Start Guide

A fast, practical guide to get agents productive in minutes.
For full details, screenshots, and advanced workflows, refer to the **Legacy CRM-AMS User Guide**.

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1. Getting Started

1.1 Log In

1. Open the **Legacy CRM-AMS** app (web or mobile via Power Apps).
2. Sign in with your Microsoft account.
3. Allow the app a few seconds to load your permissions and settings.

1.2 Navigation Basics

Use the **sidebar** for all major sections:

- Dashboard
- Leads
- Lead Source / Lead Campaign
- Clients
- Policies
- Carriers
- Tasks
- Calendar
- Reports
- Agents / Vendors / Users (role-restricted)

Top-right buttons appear on most screens:

- **+ Lead**
- **+ Client**
- **+ Task**

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2. Working With Leads

Leads are the starting point for all new business in Legacy CRM-AMS.

2.1 Add a New Lead

1. Click **+ Lead**.
2. Enter required fields:
    - First/Last Name
    - Lead Source
    - Market Type
    - Contact info
3. Add optional notes.
4. Click **Save Lead**.

➞ For full workflow: *User Guide Section 3*

2.2 Lead Source & Lead Campaign (Quick Overview)

Lead Source
Defines *where the lead originated* (Facebook, Direct Mail, Website, Referral, etc.).
Agents may add new sources inline using **+ Add Source**.

Lead Campaign
Used when the lead came from a specific paid campaign.
This powers the **Lead Campaign ROI Report**.

➞ For details: *User Guide Sections 3 & 12*

2.3 Bulk Lead Uploads

Agents and Admin may upload multiple leads using the CSV upload screens.

1. Go to **Lead Campaign** → **Import Leads**.
2. Download the CSV template (recommended).
3. Upload your file.
4. Review:
    - Total Rows
    - Valid Rows
    - Error Rows

5. If errors exist, fix your CSV and re-upload.

➞ Full instructions: *User Guide Section 4*

2.4 Update a Lead

1. Go to **Leads**.
2. Search or scroll to find the record.
3. Click the **magnifying glass** to open details.
4. Add notes or update fields.
5. Click **Save Lead**.

2.5 Convert Lead → Client

1. Open lead details.
2. Click **Convert to Client**.
3. Confirm conversion.
4. Choose **Transfer Notes** (recommended).

➞ Conversion details: *User Guide Section 6*

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3. Working With Clients

3.1 Add a Client

Most clients come from converting leads.
To create manually:

1. Click **+ Client**.
2. Enter required details.
3. Save.

3.2 Client Tabs Overview

Client profiles contain:

- **Details**

- **Policies**
- **Household**
- **Client Notes**
- **Documents** (PDF Upload)

Use the page header to confirm which client you are working on.

➞ See *User Guide Section 7*

3.3 Uploading Client Documents (PDF)

Agents can store important PDFs in the client record.

1. Open a client.
2. Go to the **Documents** tab.
3. Click **Choose File** → select PDF (max 25MB).
4. Click **Upload PDF**.
5. View, open, or delete versions as needed.

➞ Document storage details: *User Guide Section 7.4*

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4. Adding Policies

4.1 Add a Policy

You may add a policy:

- From the top menu (**+ Policy**)
- Inside a client → **Policies** tab → **Add Policy**

4.2 Enter Policy Details

Enter:

- Carrier
- Plan
- Effective Date
- Face Amount
- Premium mode & amount

- Writing Agent details (auto-filled)

⭐ **Important**

You must **Save** the policy before the **Beneficiaries** tab becomes available.

➞ Full instructions: *User Guide Section 8*

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5. Tasks & Calendar

5.1 Create a Task

1. Click **+ Task**.
2. Fill in:
   - Assigned Agent
   - Due Date
   - Priority
   - Notes
3. Save.

5.2 Manage Tasks

1. Go to **Tasks**.
2. Use:
   - Task scope (Mine/Team)
   - Filters: Open, Completed, Overdue, This Week
   - Search bar
   - Sort controls

Click:

- **Open** → edit task
- **Complete** → mark finished

5.3 Calendar View

1. Go to **Calendar**.

2. Click dates showing a task count.
3. See all tasks scheduled for that day.

➞ Full task system: *User Guide Section 10*

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6. Reports

The Reporting Hub includes:

- Client & Leads reports
- Policies & Production reports
- Agent Views (Lead Campaign ROI)

6.1 Running a Report

1. Open **Reports**.
2. Select a category.
3. Pick a report.
4. Apply filters:
    - Date range
    - Client
    - Search by Effective Date or Status Date
5. Results appear instantly.

6.2 Printing / PDF

Use either:

- **Print icon**
- **PDF icon**

Both open the print dialog where you can:

- Print on paper
- Save as PDF

➞ Full reporting guide: *User Guide Section 12*

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7. Carriers

Agents can:

- View Legacy-approved carriers
- Access carrier portal links
- View phone numbers
- See all available carrier products

Admins assign carriers to agents; agents cannot do so from this screen.

➞ See *User Guide Section 9*

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8. Tips for Success

- Refresh after large imports or lead batches.
- Save frequently when entering multiple records.
- Use **Add Another Policy** to reset the form when entering multiple policies.
- Always **Transfer Notes** during lead conversion.
- Use **Tasks + Calendar** for daily management.

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9. Getting Help

If issues occur:

1. Refresh the browser/app.
2. Verify your internet connection.
3. Check for duplicate entries.
4. Review:
    - **Troubleshooting** (User Guide Section 13)
    - **Glossary** (User Guide Section 14)

If still stuck, contact:

- Your agency admin
- Legacy support