

Getting Started

Platform: 1Stream CRM

Version: 14,0

Audience: Users



What is 1Stream CRM?

1Stream CRM is an all-in-one solution for businesses looking to grow revenue, improve service & build customer loyalty. 1Stream CRM caters for all Sales, Service, Marketing and Telephony needs in one place.

Course Outline

- Log In
- Navigate the Home Screen
 - Conversations
 - Activities
 - Profile Settings
- Navigate Applications
 - Search
 - Favourites
 - Documents
- Navigate Activities in an Application
- Navigate Display Views



Course Outline

- Navigate “Discuss”
 - Inbox/Starred/History
 - Channels
 - Direct Messages
- Make and Receive Calls (*for customers using the “Call Centre” Application*)
 - Search
 - Favourites
 - Documents
- Navigate “Contacts”





THANK YOU

www.1Stream.co.za

1STREAM
simplicity at work