

digital 55



Simple. Flexible. Powerful.

Main Points

Get the most out of your CRM

- * Using Inugo CRM means YOU control your Customer Contact Information. If your people keep the information in their mobile device or in an excel sheet, they can take it with them if they ever quit.
- * Digital 55's Simple and Easy CRM streamlines the entire process. Reports, Metrics, and so much more allows you to keep your business running and track where it's falling short. Being Simple & Easy there is greater employee adoption.
- * Our system contains many ways to personalize to your business. Our custom fields and ability to customize standard fields will help you accomplish your goals.

Login Screen

<https://crm2.0.priyanet.com/Login/Login>



The screenshot shows a web login interface for 'digital 55'. At the top center is the logo, which consists of the word 'digital' in black and a stylized '55' in orange and blue. Below the logo is a light gray rectangular box containing the login form. Inside this box, at the top, is the text 'Sign in to your account' centered. Below this text are three input fields, each with a small icon on the left: the first is labeled 'Client ID', the second 'User ID', and the third 'Password'. Below the input fields, there is a checkbox labeled 'Remember me' on the left and a link 'Forgot your password?' on the right. At the bottom right of the form box is a blue button with the text 'LOG IN' in white. At the very bottom of the page, centered, is the text 'Version 2.0.7'.

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Sign in to your account

Client ID

User ID

Password


☐ Remember me


[Forgot your password?](#)

LOG IN


Version 2.0.7


Home Page


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Your Name ▾


 Home

 Dashboard

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Getting Started with CRM




Leads
Leads are the individuals or representatives of organizations who show interest in your products or services.
Import Leads



Contacts
Contacts are the people in the company with whom you communicate and interact in pursuit of a business opportunity.
Import Contacts




Companies
Companies can also be leads. Customers or Opportunities.
Import Companies




Opportunities
Opportunities represent a potential sale.

Easy Setup for Administrator



Add User
Start building your sales team



Customization
Give your users, roles, permissions to hide and access the modules.

Version 2.0.5

* Choose the Module desired from the main screen or use the Left Navigation Menu

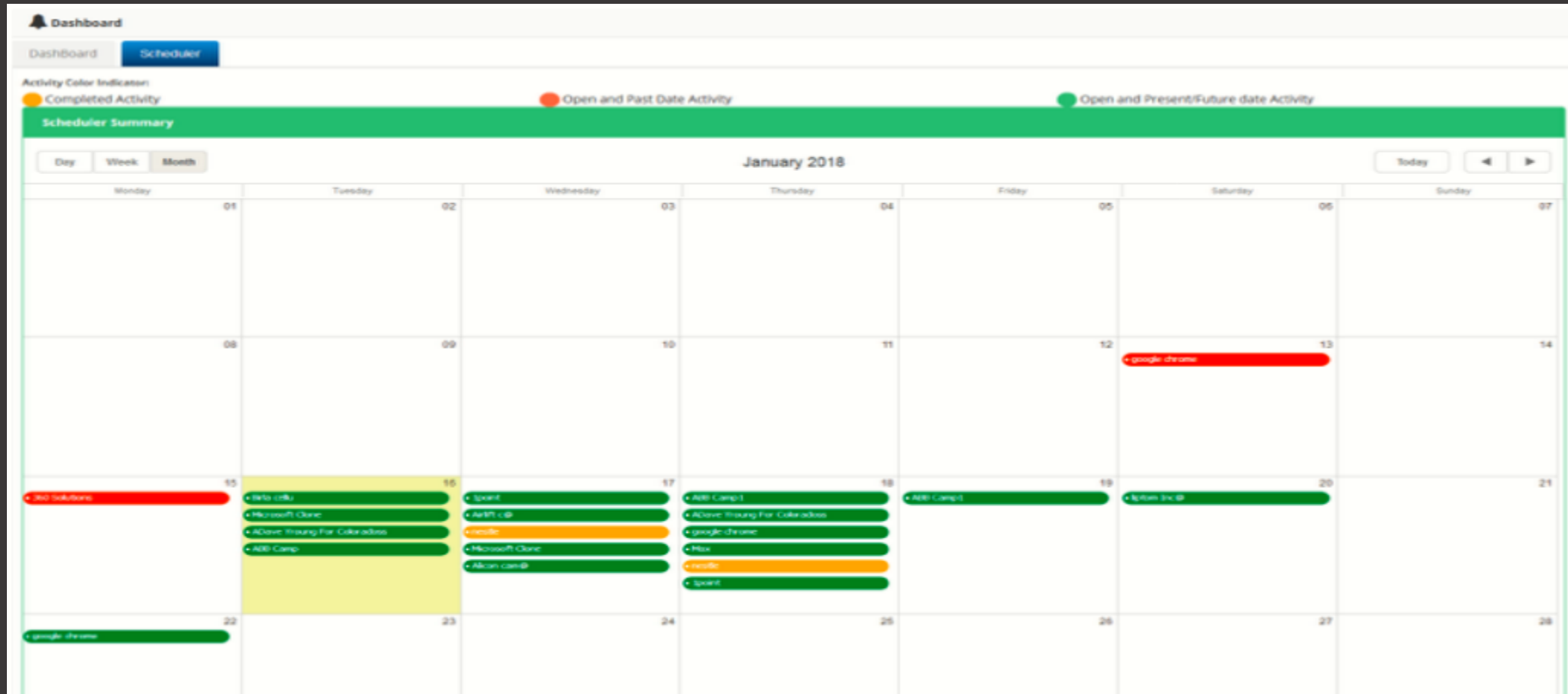
Dashboard

Dashboard gives you a quick glance of how your Organization or Sales Team is performing



Scheduler

Scheduler represents all the created activities in calendar form to get the quick idea about what is coming up and what is overdue



Leads Module

Leads ‘typically’ are Potential Clients or Customers you are talking to but are not yet utilizing your products or services.

* Click “Add New” on the Right side to Create a New Lead.

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Leads

Keyword :

Lead Owner :

Search Clear

Import History Import Add New

	#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	
	Delete	View/Edit	Lead Name	Company	Lead Source	Lead Owner	Lead Status																					
			Your Information Here	Your Information Here	Your Information Here	Your Information	Cold																					
			Your Information Here	Your Information Here	Your Information Here	Your Information	Cold																					
			Your Information Here	Your Information Here	Your Information Here	Your Information	Cold																					
			Your Information Here	Your Information Here	Your Information Here	Your Information	Cold																					
			Your Information Here	Your Information Here	Your Information Here	Your Information	Cold																					
			Your Information Here	Your Information Here	Your Information Here	Your Information	Cold																					
			Your Information Here	Your Information Here	Your Information Here	Your Information	Cold																					
			Your Information Here	Your Information Here	Your Information Here	Your Information	Cold																					
			Your Information Here	Your Information Here	Your Information Here	Your Information	Cold																					
			Your Information Here	Your Information Here	Your Information Here	Your Information	Cold																					

Showing 1 to 10 of 617 Records

First Previous 1 2 3 4 5 ... 62 Next Last

Create Lead

Add a Lead quickly. Only Company Name and First Name is required.

Create Lead

Save & New

Save

Back

Lead Detail

Lead Owner :

Auto populated based on User Login

Company Legal Name :*

Company DBA Name :

Title :

First Name :*

Middle Name :

Last Name :

Email :

Phone :

Extension :

Fax :

Mobile :

Website :

Lead Source:*

Website

Lead Status:*

Cold

Address Detail

Notes

Attachment

Additional Information

Convert Lead

Convert a Lead to a Contact quickly. All Data, Notes, Activities, Attachments, and Company will also convert.

- Company is found in Company Module when Lead is converted to Contact or entered via Company or Contact Modules.

Edit John Smith

Lead Detail

Activity

Notes

Attachments

More Actions

Edit

Convert

Back

John Smith - Sample Company

Lead Owner :

Your Name Here

Email :

john@email.com

Phone:

555-555-5555

Mobile :

444-444-4444

Lead Detail

Lead Owner :

Jennifer Whitlow

Company Legal Name :

Sample Company

Company DBA Name :

Title :

Owner

First Name :

John

Middle Name :

Last Name :

Smith

Email :

john@email.com

Phone :

555-555-5555

Extension :

1000

Fax :

555-555-5555

Mobile :

444-444-4444

Website :

SampleWebsite.com

Lead Source :

Website

Lead Status:

Hot

Convert Lead

Convert a Lead and add an Opportunity. If checkbox is checked, Opportunity will be created. Opportunity Name can be Client Name or pertain to the quote. Budget and Close Date are optional.

Convert Lead (- Sample Company)

Create New Company - **Sample Company**

Create New Contact - **John Smith**

☒ Create a new Opportunity for this Company

Opportunity Name :*

Website Design & Hosting

Expected Budget(\$):

5000

Estimated Close Date :

04/30/2020

Buying Stage :*

Proposal /Quote ▼

Owner of the records : Jennifer Whitlow

Note:

All associated activities of Leads will be transferred to the new Company, Contact & Opportunity

↔ Convert

⬅ Back

Companies Module

Add a Company quickly. Only Company Name is required.
Convenient Search bar options saves you time.

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Companies

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Keyword :

Company Owner :

Search

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Import History

Import

Add New

Delete

	#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	Per page: 10
	Del	View/Edit	Company Name	Phone	Company WebSite	Company Owner																						
			Your Information Here	Your Information	Your Information Here	Your Information																						
			Your Information Here	Your Information	Your Information Here	Your Information																						
			Your Information Here	Your Information	Your Information Here	Your Information																						
			Your Information Here	Your Information	Your Information Here	Your Information																						
			Your Information Here	Your Information	Your Information Here	Your Information																						
			Your Information Here	Your Information	Your Information Here	Your Information																						
			Your Information Here	Your Information	Your Information Here	Your Information																						
			Your Information Here	Your Information	Your Information Here	Your Information																						
			Your Information Here	Your Information	Your Information Here	Your Information																						
			Your Information Here	Your Information	Your Information Here	Your Information																						

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First Previous 1 2 3 4 5 ... 92 Next Last



Companies Module

Clone a Company. Company Name is allowed once in the CRM. If you receive an error "Company already exists" please change Company Name.

Example: Sample Company -> Sample Company, LLC

 Edit John Smith

Lead Detail

Activity

Notes

Attachments

John Smith - Sample Company

Lead Owner : Jennifer Whitlow


Email : john@email.com


Phone: 555-555-5555


Mobile : 444-444-4444

More Actions

☐ Clone

 Delete

 AddNew

 Activities List

Edit

Back

Lead Detail

Lead Owner :

Jennifer Whitlow

Company Legal Name :

Sample Company

Company DBA Name :

Title :

Owner

First Name :

John

Middle Name :

Last Name :

Smith

Email :

john@email.com

Phone :

555-555-5555

Extension :

1000

Fax :

555-555-5555

Mobile :

444-444-4444

Website :

SampleWebsite.com

Lead Source :

Website

Lead Status:

Hot

Contacts Module

Contacts ‘typically’ are Current or Past Clients or Customers
Add a Contact quickly. Only Company Name, First Name, and Lead Source is required.
* Convenient Search bar options saves you time.

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Company Name :

Contact Owner :

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Clear

Advanced Search

Import History

Import

Add New

Delete

All

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Per page: 10

	Delete	View/Edit	Contact Name	Company Name	Contact Owner	Department	Status
			Your Information Here	Your Information	Your Information Here	Your Information	Active
			Your Information Here	Your Information	Your Information Here	Your Information	Active
			Your Information Here	Your Information	Your Information Here	Your Information	Active
			Your Information Here	Your Information	Your Information Here	Your Information	Active
			Your Information Here	Your Information	Your Information Here	Your Information	Active
			Your Information Here	Your Information	Your Information Here	Your Information	Active
			Your Information Here	Your Information	Your Information Here	Your Information	Active
			Your Information Here	Your Information	Your Information Here	Your Information	Active
			Your Information Here	Your Information	Your Information Here	Your Information	Active
			Your Information Here	Your Information	Your Information Here	Your Information	Active

Showing 1 to 10 of 396 Records

First

Previous

1

2

3

4

5

...

40

Next

Last

Opportunities Module

Opportunities are the deals that can be possible with your Companies and Contacts

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Keyword :

Company Name :

Opportunity Owner :

Stage :
Select Stage

Search

Clear

Add New

Delete

All

#

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Per page 10

	Delete	View/Edit	Opportunity Name	Opportunity Stage	Company Name	Contact Name	Opportunity Owner
<input type="checkbox"/>			Your Information Here	Your Information	Your Information Here	Your Information	Your Information
<input type="checkbox"/>			Your Information Here	Your Information	Your Information Here	Your Information	Your Information
<input type="checkbox"/>			Your Information Here	Your Information	Your Information Here	Your Information	Your Information
<input type="checkbox"/>			Your Information Here	Your Information	Your Information Here	Your Information	Your Information
<input type="checkbox"/>			Your Information Here	Your Information	Your Information Here	Your Information	Your Information
<input type="checkbox"/>			Your Information Here	Your Information	Your Information Here	Your Information	Your Information
<input type="checkbox"/>			Your Information Here	Your Information	Your Information Here	Your Information	Your Information
<input type="checkbox"/>			Your Information Here	Your Information	Your Information Here	Your Information	Your Information
<input type="checkbox"/>			Your Information Here	Your Information	Your Information Here	Your Information	Your Information
<input type="checkbox"/>			Your Information Here	Your Information	Your Information Here	Your Information	Your Information

Showing 1 to 10 of 192 Records

First

Previous

1

2

3

4

5

...

20

Next

Last

Create Opportunity

Add an Opportunity quickly when converting a Lead to a Contact OR from Opportunity Module.
Only Opportunity Name, Company Name, Buying Stage, and Opportunity Source are required.

Create Opportunity

Save & New

Save

Back

Opportunity Detail

Opportunity Owner :

Your Name Here

Q

Opportunity Name :*

Estimated Close Date:

Company Name:*

Q

Buying Stage :*

Needs Analysis

Type :*

Existing customer

Probability:

Expected Budget (\$):

Opportunity Source:*

Website

Contact :

Q

Email :

Phone :

Extension :

Notes

Attachment

Additional Information

Activities Module

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Search

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Add

Delete

Complete

All

#

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y


Z

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	Del	View/Edit	Due Date	Company	Contact/Lead Name	Type	Phone	Email	Status	Priority	Owner
			3/28/2019	Your Information Here	Your Information	Call Client	555-555-5555	name@email.com	Open	High	Your Info
			3/27/2019	Your Information Here	Your Information	Email Client	555-555-5555	name@email.com	Closed	High	Your Info
			3/27/2019	Your Information Here	Your Information	Meeting with Client in Person	555-555-5555	name@email.com	Open	High	Your Info
			3/27/2019	Your Information Here	Your Information	Schedule Meeting	555-555-5555	name@email.com	Closed	High	Your Info
			3/26/2019	Your Information Here	Your Information	Project Due	555-555-5555	name@email.com	Open	High	Your Info
			4/3/2019	Your Information Here	Your Information	Project Review	555-555-5555	name@email.com	Closed	High	Your Info
			3/22/2019	Your Information Here	Your Information	Photo Shoot	555-555-5555	name@email.com	Open	High	Your Info
			3/27/2019	Your Information Here	Your Information	Other	555-555-5555	name@email.com	Closed	High	Your Info

Notifications Module

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 Your Name

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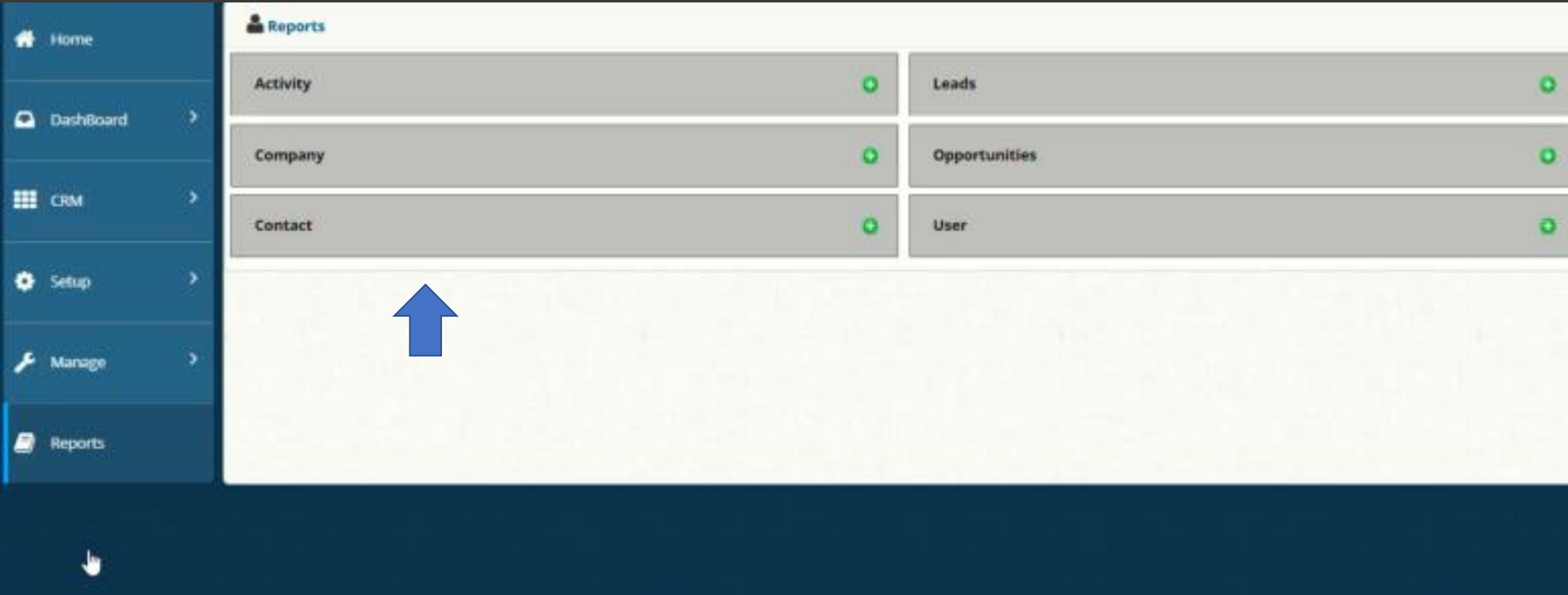
NotificationsList


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Activity Type	Due Date	Priority	Status	Subject	Contact	Company	Phone	Email	Module
Meeting with client in person	3/28/2019	High	Open	Your Information	Info	Your Information	555-555-5555	name@email.com	Opportunities
Call Client	3/27/2019	High	Completed	Your Information	Info	Your Information	555-555-5555	name@email.com	Opportunities
Call Client	3/27/2019	High	Open	Your Information	Info	Your Information	555-555-5555	name@email.com	ConvertLead
Call Client	3/27/2019	High	Open	Your Information	Info	Your Information	555-555-5555	name@email.com	Opportunities
Call Client	3/26/2019	High	Open	Your Information	Info	Your Information	555-555-5555	name@email.com	Leads
Schedule meeting with client	4/3/2019	High	Open	Your Information	Info	Your Information	555-555-5555	name@email.com	Leads
Email client	3/22/2019	High	Open	Your Information	Info	Your Information	555-555-5555	name@email.com	Leads
Meeting with client in person	3/27/2019	High	Open	Your Information	Info	Your Information	555-555-5555	name@email.com	Leads
Call Client	5/15/2019	Medium	Open	Your Information	Info	Your Information	555-555-5555	name@email.com	Leads
Email client	3/27/2019	High	Open	Your Information	Info	Your Information	555-555-5555	name@email.com	Leads

Reports

Click the tabs to see all available Reports



Activity 

Activity Details

Activity By Type

Activity By Status

Activity By Priority

Activity By Module

Open Activities In This Month

Completed Activities In This Month

Activity 

Company 


Company Details

Company By Company Type

Company By Company Industry

Company By Company Ownership Ty...

Company By Company Owner

Activity 

Company 

Contact 


Contact Details

Contact By Lead Source

Contact By Contact Type

Contact By Lead Source And Contact ...

Contact By Contact Owner

Leads 

Lead Details

Leads By Lead Source

Leads By Lead Status

Leads By Lead Source And Lead Status

Lead By Lead Owner

Leads 

Opportunities 

Opportunity Details

Opportunity By Buying Stage

Opportunity By Opportunity Type

Opportunity By Opportunity Source

Won Opportunities In This Month

Lost Opportunities In This Month

Opportunity Report

Opportunity User

Report Options

Reports

[illegible]

- ✓ **Lead Reports**
- ✓ **Company Reports**
- ✓ **Contact Reports**
- ✓ **Opportunity Reports**
- ✓ **Activity Reports**
- ✓ **User Reports**

For More Information
Contact:

Jennifer Whitlow
jwhitlow@digital-55.com
419-724-0228 ext 204

1789 Indian Wood Circle Drive,
Suite 140
Maumee, Ohio 43537