Base CRM Guide

Getting started and understanding of the basic features of Base CRM.
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Logging In

You can access Base from anywhere using any device with Internet connection. To log into Base, visit getbase.com and click the “LOGIN” link at the top of the page. Once you see the login screen, enter your credentials and click “Login”.

The Sales and CRM Software Your Team Will Actually Use.

Whether you run a small business, mid-market or enterprise sales team, Base will make you and your team 10x more productive.

Try It Now >
Desktop Navigation

Base uses icons to indicate the different sections in the application. These icons are used throughout Base to indicate a Lead, Contact, Deal, Task, etc.

**DASHBOARD**
An overview of all your activity in Base

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

**CONTACTS**
All your business contacts including people and companies

**DEALS**
Sales opportunities related to your business contacts

**TASKS**
Tasks related to Leads, Contacts and Deals

**EMAIL**
An inbox where you can track all email communications with Contacts and Deals

**REPORTS**
A series of reports related to your sales efforts
Settings

Base settings are a place for you to manage your personal account settings, set up integrations, manage custom fields, import and export data and more. Settings can be found by clicking the 🎉 gear icon in the top right of the page.
Your Dashboard

Your dashboard is the first screen you see when you sign in to your Base account. It’s meant to give you a quick snapshot of all important activity going on in your account. If you’re an admin, you will have the ability to filter the dashboard news feed by user.

**Pipeline Summary**
The left column is your pipeline summary which give you the total value of your Deals, how many Deals you have in your pipeline, your closed Deals divided into categories, and team Deal load.

**Activity Feed**
The center column is a feed of all the activity taking place in your account. It can be filtered by Notes, Completed Tasks, and Deals. When a you or a team member adds a new Deal, Lead, Contact, Note, or Task, it will show up in this feed.

**List of Tasks and Deals**
The right column shows your list of tasks with due dates. You can also see a list of the tops Deals in your account.
LEADS

What is a Lead?

A Lead is a Person, Company, or business opportunity that hasn’t yet been qualified for your sales pipeline. Typically, these are contacts you make from networking, at trade shows, seminars, ads and purchased lists (among many other places). When leads become qualified, they can be converted to contacts or deals.

A list of your Leads can be found by clicking on the target icon in the main navigation at the top of the application.
LEADS

Importing Leads

Leads can be imported from a CSV or VCF file. Base also supports importing from 3rd party applications like Linkedin, Salesforce and Google. More information about exporting Leads from specific applications can be found at http://support.futuresimple.com.

To import leads to Base, go to ☰️ Settings > Import, choose where your data is and follow the instruction for importing.
Adding a Lead

Leads can be added manually or bulk imported from an external sources as mentioned on the previous page. To manually add a lead, navigate to the lead tab and select the “+ Lead” button.
Converting a Lead

When a Lead is qualified you can convert this Lead into a Contact with a Deal associated to it. Converted Leads retain all their custom information.
Converting a Lead into a contact means that you’re on the right track to moving another opportunity through your sales pipeline. When you convert a Lead, you have three options:

1. **Convert the lead to a contact, with no other action.**
   This will simply move the contact card from your Leads tab to your Contacts tab. One major difference between the two, is that you can now start emailing the contact through Base if you have full sync and sort email integration enabled.

2. **Convert the lead to a contact, and create a deal for the converted lead.**
   Checking the “Create a deal for this converted lead” will, as you might have guessed, create a new deal for your converted lead! You can edit the deal name in the text field below the checkbox if you’d like. The new deal will show up in your “Prospects” stage.

3. **Create a task for each converted lead.**
   By selecting this checkbox, you have the option of adding a task to your converted lead’s contact card. You can set the task content (i.e. follow up), and the task due date/time.
LEADS

How do Leads Fit into the Sales Process?

Leads are the first stop for the sales process. When you first receive a lead, you’ll want to enter them as a lead. While they are a lead, you’d call or email them to qualify them as a prospect. If they are qualified, convert the lead so they become a contact, or a contact and a deal. If the lead is not qualified, simply delete them. The big advantage of using leads is that you can be sure your account will remain organized. You will never have contacts clogging your database that are not being used.
**Your Contacts**

Contacts are the centerpiece of every Base account. Each contact has its own “contact card” or profile. There are two different types of contacts, Company Cards and Personal/Individual Cards. The company card serves as the parent card while the personal cards are the children or employees.

A list of your contacts can be found by clicking on the person icon in the main navigation at the top of the application.
CONTACTS

Importing Contacts

Contacts can be imported from a CSV or VCF file. Base can also import data from Google, Salesforce and Highrise. More information about exporting contacts from specific applications can be found at http://support.futuresimple.com.

To import contacts to Base, go to Settings > Import, choose where your data is and follow the instruction for importing.
Adding Contacts

Contacts can be added manually, bulk imported from an external file or synced from 3rd party applications like Google, Outlook and Salesforce as mentioned previously.

To manually add a contact, navigate to the contacts tab and select either the “+ Person” or “+ Company” button depending on what you are adding.
Editing Contacts

Contact cards include basic information like name, title, address, email phone number etc. A Contact card also includes any custom fields you have set up. Base allows you to easily and quickly edit a Contact’s information.

To edit a contact, open either the person or company contact card you wish to edit and click Edit in the bottom left corner of the contact card.
What is a Deal?

A deal is the entity that you track through your sales pipeline. Each deal is associated to either a person or company in your Base account. Deals can be created from the deal page, the contact card, or a lead can be converted into a deal.

Deals can be found by clicking on the dollar icon in the main navigation at the top of the application.
DEALS

Adding a Deal

Deals can be added from the Deal list page or from a company or individual contact card.

To add a Deal from the List of deals, click the “+ Deal” button at the top left of the list.

When you are adding a Deal using this option, you will not have access to all the custom fields.

To add a Deal from a Company or Contact card, click the “Add a deal for contact (company)” button in the top right of the contact card.
Adding Forecasting to Deals

When adding a Deal to your pipeline, Base enables you to choose a closing date and a win likelihood percentage.

The first thing to do when adding a new deal is enter in the forecast information (What percentage you are likely to win the deal and when the closing date will be). Keep in mind this information can be changed at any time.
Adding a Contact to a Deal

Adding a Contact to a Deal allows you to associate a person or company to a deal. This allows you to track all conversations in context of that Deal.

To add a Contact to a Deal, click the “Add a contact to this deal” button at the top right of the Deal card. You are also given the option to add a Contact to a Deal when you initially create the Deal.
DEALS

Adding a Task to a Deal

Adding tasks to Deals allow you to keep track of action items in context of that Deal. This gives you a quick visual of what needs to be done next to close the Deal.

To add a Task to a Deal, click the “Add task for this deal” button at the top right of the Deal card.
Your Documents

Documents is a feature that’s innately available in Base to store different types of documents and attach them to Deals in the system. There are no 3rd party integrations to set up or extra costs from 3rd parties. Documents are accessible by all users with access to that deal, there are no restrictions like in Dropbox or Google Drive.
To attach documents to a Deal, simply drag and drop your file(s) from your computer to the Deal and Base will take care of the rest. Additionally, you can click on the Plus sign as indicated above to select the file(s) you'd like to attach to the deal. Once the documents are uploaded, all users in Base that have access to the Deal will be able to access and download the documents.
**Your Tasks**

Tasks are a very important part of Base. We believe in being action biased and tasks are the backbone of that. Add tasks to Contacts, Leads and Deals to stay on top of next step.

Cut down on repetitive tasks through convenient automation. Create rules for action-based tasks and reminders to automate business functions. *(PREMIUM FEATURE)*

Tasks can be added from specific Contact, Lead and Deal cards or from the Tasks page. Tasks include the ability to choose a due date and assign it to someone on our team.
Connect Your Emails

Connecting your email with Base is fast, easy and the best way to synergize your email correspondence with Contacts and Deals in your sales pipeline.

To connect your email to Base, click the Email icon tab in the top navigation and follow the set up instructions for your specific email provider.
Emails sent through Base are tracked and associated with Contacts and Deals. This allows you to always see your last touch point and pick up easily where you left off.

To send an email, click the “Send an Email” tab from either the Contact or Deal detail card. Then simply compose your email and send. Note that if you send an email from the Deal card, the email will be associated to the Contact and the Deal.
VOICE

What is Voice?

Make and receive phone calls directly within the CRM on your computer, mobile phone or tablet. Track all calls related to your leads, contacts and deals. Listen to recorded calls and use advanced analytics and reporting to improve your team’s sales performance. (PREMIUM FEATURE)

To make a call from any device, click (or tap) on the phone number associated with the Contact or Lead. Call summaries can be logged with call recordings, call outcomes and call specific notes.
Your Reports

Enjoy useful and insightful reports. With Base, you’ll be able to quickly identify the strengths and weaknesses in your pipeline to improve sales performance. Measure your team’s activity and analyze how to help your business grow faster.

Access a variety of insightful reports from the reports tab in the main navigation including a funnel report, forecasted sales report, sales goals and sales by account reports. Filter reports by users, date ranges, tags and other relevant filters.
iOS, Android and Windows Phone

Base offers native applications for the iPhone, iPad, Android, Android Tablet and Windows Phone. Base is the #1 result when you search for “CRM” in both the Android and iOS app stores.
Sync

Any information that is entered into the mobile app will show up on the web app and vice versa. The apps are optimized to sync at the best intervals, but a manual sync can also be triggered.
Offline Access

The mobile applications operate in offline mode. Once an internet connection becomes available, all changes will be pushed/pulled to the web.
Your Permissions

Setting up and maintaining user data access permissions can be a daunting task. Ensuring that users have the right level of data access to different entities is a sophisticated activity that can take days and weeks in other competing CRM platforms.
In Base we have heavily invested in a revolutionary interface that visually and intuitively presents the level of permissions on a clear organizational hierarchy model.

User permissions are easily defined by clicking on the user and granting or restricting data access in a dialog box.

Moreover, by hovering over the organizational hierarchy, Base visually shows the data visibility of different system entities to each and every user.
Base CRM

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