Xrero CRM

Leads, Pipeline & Customer Relationships — User Manual

For sales teams & managers

United Arab Emirates edition

Version 2.0 · May 2026 · Complete illustrated guide

Table of Contents

Every screen in this manual reproduces the live Xrero CRM module. All names and content shown are demonstration data.

1. Introduction & how it works

Xrero CRM helps your sales team turn interest into revenue. Every potential deal is an **opportunity** that moves along a **pipeline** of stages — from first contact to a won sale. Along the way you log calls and meetings, send emails, record what the customer wants, and forecast the value of your pipeline. When a deal is ready, you turn it into a quotation with one click.

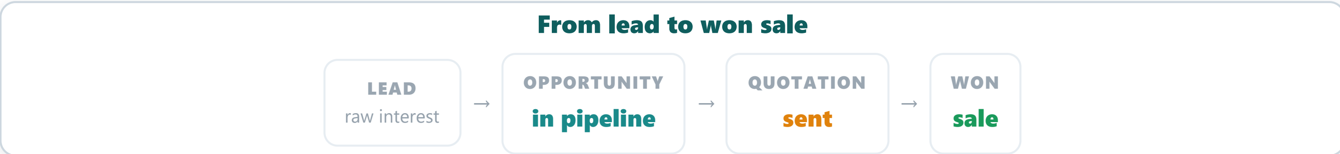

Figure 1.1 — CRM tracks every deal from first interest to a won sale and a quotation.

This manual is for **salespeople** who work their deals daily and **managers** who watch the team's pipeline and forecast. All amounts are in **AED**.

> **Good to know**
> The pipeline is a kanban board — you literally drag a deal card from one stage to the next as it progresses.

2. Getting Started & the menu

Open `CRM` from the apps menu. The top menu organises everything.

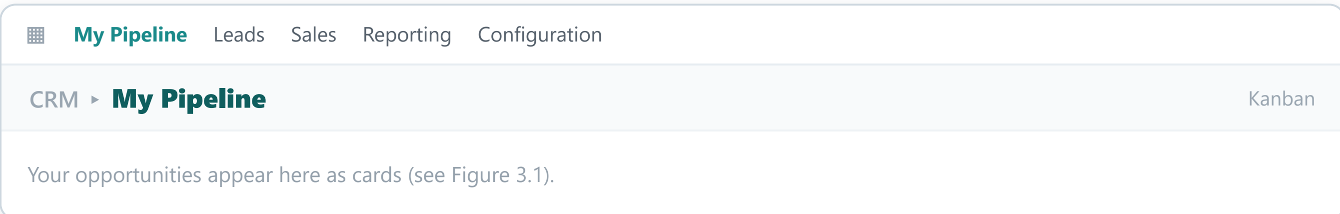

Figure 2.1 — The CRM menu.

Menu	What you'll find there
My Pipeline	Your opportunities on the kanban board.
Leads	Unqualified enquiries (if leads are enabled).
Sales	My Quotations, customers and teams.
Reporting	Pipeline analysis and forecast.
Configuration	Stages, sales teams, tags, lost reasons.

3. The Pipeline

Menu path: CRM ▸ My Pipeline

The pipeline is the heart of CRM — a **kanban board** with one column per stage. Each card is an opportunity showing the customer, the expected revenue and the next activity. Drag a card rightwards as the deal advances.

Figure 3.1 — The pipeline kanban: opportunities as cards, one column per stage.

4. Stages

Stages are the columns of your pipeline — the steps a deal passes through. The defaults suit most businesses, and you can rename or add your own in Configuration.

Stage	Means
New	A fresh opportunity, not yet worked.
Qualified	You've confirmed there's a real need and budget.
Proposition	A quotation/proposal has been sent.
Won	The customer agreed — the deal is closed-won.

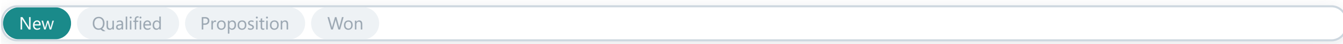

Figure 4.1 — The default stages, left to right.

5. Creating an opportunity

Click `New` on the pipeline. Give it a short title, the customer, the expected revenue and your email/phone contact. It appears as a card in the first stage, ready to work.

1. On `My Pipeline`, click `New`.
2. Type the **Opportunity** name (e.g. "Coffee machines — Marina Cafe").
3. Set the **Customer**, **Expected Revenue** and **Email/Phone**.
4. Click `Add` — the card joins the board.

New opportunity

Opportunity	Coffee machines — Marina Cafe
Customer	Marina Cafe LLC
Expected Revenue	AED 12,300
Email	info@marinacafe.ae

Figure 5.1 — Creating an opportunity with customer, revenue and contact details.

6. Inside an opportunity

Open a card to see the full opportunity. The top shows the **stage bar** (click to move stage) and the **Won / Lost** buttons. The body holds the customer details, expected revenue, the assigned salesperson and team, tags, and the **chatter** where everything is logged.

Pipeline ▸ **Desert Rose Hotel** Qualified

Won | Lost | New Quotation — New | Qualified | Proposition | Won

AED 42,000 · Desert Rose Hotel

Customer	Desert Rose Hotel
Email / Phone	gm@desertrose.ae · +971 4 555 1234
Salesperson	Layla Hassan
Sales Team	Direct Sales
Expected Closing	2026-06-10

Figure 6.1 — An opportunity: stage bar, Won/Lost, customer details and assignment.

7. Leads & converting them

Menu path: CRM ▸ Leads

If your business gets many raw enquiries, turn on **Leads**. A lead is an unqualified contact you haven't yet decided to pursue. When it looks promising, click `Convert to Opportunity` — it joins the pipeline and you can link or create the customer.

CRM ▸ Leads ▸ **Website enquiry** Lead

Convert to Opportunity | Lost

Contact	Omar from Gulf Foods
Email	omar@gulffoods.ae
Source	Website form

Figure 7.1 — A lead with a Convert to Opportunity button.

> **Leads are optional**
> Many teams skip leads and create opportunities directly. Turn leads on only if you need a "holding area" before qualifying.

8. Activities — calls, meetings, to-dos

Activities keep deals moving. Schedule a **call**, **meeting**, **email** or **to-do** with a due date, and CRM reminds you. The pipeline card shows a coloured clock — green (planned), amber (today), red (overdue) — so nothing slips.

Schedule Activity

Type	Call
Summary	Discuss requirements
Due Date	Tomorrow
Assigned to	Layla Hassan

Schedule | Mark Done

Figure 8.1 — Scheduling a call activity with a due date and owner.

9. Notes, emails & the chatter

Every opportunity has a **chatter** at the bottom — a running history. **Log a note** to record what happened on a call; **Send a message** to email the customer directly from the deal. Emails the customer sends back are attached too, so the whole conversation lives on the deal.

Chatter — Desert Rose Hotel

Send message | Log note | Schedule activity

Layla logged a note	Called GM — wants 30 rooms fitted by July.
Layla sent email	Proposal attached, AED 42,000.

Figure 9.1 — The chatter records notes, emails and activities in one timeline.

10. Expected revenue & probability

Each opportunity carries an **Expected Revenue** (the deal's value) and a **Probability** (your confidence, 0–100%). Together they drive the **forecast**: a 50%-likely AED 40,000 deal contributes AED 20,000 to your weighted pipeline. Update both as the deal firms up.

Expected Revenue	**AED 42,000**
Probability	**60%**
Weighted (forecast)	**AED 25,200**
Expected Closing	**2026-06-10**

Figure 10.1 — Revenue × probability gives the weighted forecast value.

11. Marking Won

When the customer agrees, open the opportunity and click `Won`. The deal jumps to the **Won** stage, its probability becomes 100%, and it counts in your won revenue. This is the moment to create or confirm the quotation (Chapter 13).

Oasis Retail · Won

Won · Proposition · Won

🎉 **Won**

AED 30,000 added to this month's won revenue.

Figure 11.1 — Marking a deal Won moves it to the Won stage at 100% probability.

12. Marking Lost & lost reasons

If a deal falls through, click `Lost` and pick a **Lost Reason** (too expensive, chose competitor, no budget…). The opportunity is archived out of the active pipeline but kept for analysis — so you learn *why* deals are lost and improve.

Mark as Lost

Lost Reason	Chose competitor
Notes	Price was 8% higher.

Mark Lost

Figure 12.1 — Recording a lost reason keeps your analysis honest.

13. Creating a quotation

From any opportunity, click `New Quotation`. CRM opens a draft sales quotation pre-filled with the customer, ready for you to add products and prices. The quotation links back to the opportunity, so revenue and follow-up stay connected. (Selling the quotation is covered in the **Sales** manual.)

Marina Cafe ▸ **New Quotation** · Draft

PRODUCT	QTY	UNIT AED	SUBTOTAL
Espresso Machine Pro	2	4,500.00	9,000.00
Grinder X	1	2,100.00	2,100.00

VAT 5%	**555.00**
Total	**AED 11,655.00**

Figure 13.1 — A quotation created straight from the opportunity (AED, 5% VAT).

14. Customers & contacts

Menu path: CRM ▸ Sales ▸ Customers

Each opportunity is tied to a **customer** record — a company or individual with addresses, contacts, email and phone. Opening a customer shows all their opportunities, quotations and history, giving you full context before any call.

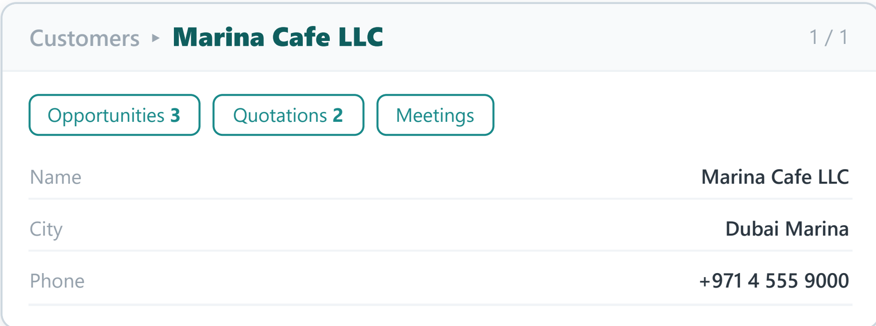

Figure 14.1 — A customer record with smart buttons to all their deals.

15. Tags & organising

Tags are coloured labels you attach to opportunities — like "Hot", "Hotel", "Repeat customer" or a product line. Filter and group the pipeline by tag to focus, for example, on all hotel deals at once.

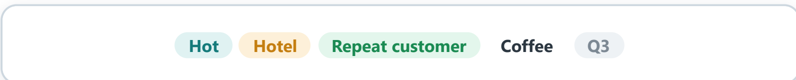

Figure 15.1 — Tags help you slice the pipeline by theme.

16. Sales Teams

Menu path: CRM ▸ Configuration ▸ Sales Teams

A **sales team** groups salespeople (e.g. Direct Sales, Online). Each opportunity belongs to a team, so managers can see each team's pipeline and targets separately. Teams also drive automatic assignment of new leads.

Configuration ▸ **Sales Teams** 1-2 / 2

TEAM	MEMBERS	PIPELINE AED
Direct Sales	Layla, Omar	142,000
Online	Sara	38,500

Figure 16.1 — Sales teams group salespeople and their pipelines.

17. My activities & planning the day

The **Activities** view lists everything you owe today and overdue — across all your deals. Work top-down: open each, do the task (call, email), then `Mark Done` and schedule the next step. It's your daily to-do list, built from the pipeline.

CRM ▸ **Activities** Today

DUE	ACTIVITY	DEAL
Overdue	📞 Call back	Gulf Foods
Today	✉ Send proposal	Desert Rose Hotel
Today	🤝 Meeting 3pm	Al Noor Trading

Figure 17.1 — The Activities view is your prioritised daily to-do list.

18. Generating leads from email & web

CRM can create opportunities automatically. A team can have an **alias email** (e.g. sales@yourco.ae) so incoming mail becomes a lead; and your **website contact form** can drop straight into the pipeline. Both mean no enquiry is ever lost.

✉ **EMAIL ALIAS** sales@yourco.ae → lead	🌐 **WEBSITE FORM** submission → lead

Figure 18.1 — Email aliases and the website form feed the pipeline automatically.

19. List, calendar & other views

Besides kanban, switch the view to suit the task: **List** for bulk edits and sorting by value, **Calendar** to see meetings by day, **Pivot** and **Graph** for analysis. The same opportunities, shown the way you need.

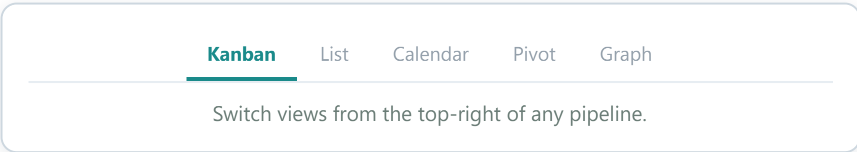

Figure 19.1 — View switcher: the same deals as kanban, list, calendar or charts.

20. Reporting & forecast

Menu path: CRM ▸ Reporting

Reporting turns your pipeline into insight: **Pipeline Analysis** (where deals sit, win rates, by team or salesperson) and **Forecast** (expected revenue by month, weighted by probability). Use it to spot bottlenecks and predict the quarter.

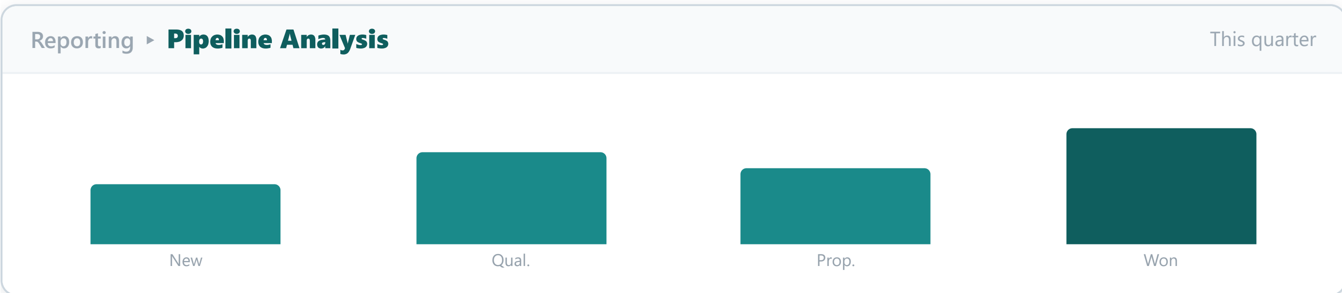

Figure 20.1 — Pipeline Analysis shows value and counts by stage.

21. The Sales dashboard

The CRM dashboard gives managers the headline numbers at a glance — new opportunities, expected revenue, won this month and activities due — with the team's pipeline beneath. It's the first screen to open each morning.

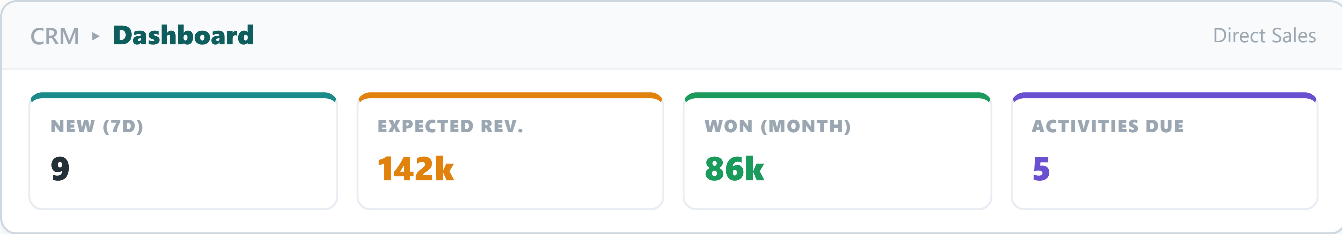

Figure 21.1 — The Sales dashboard: pipeline health in four numbers.

22. Configuration

Menu path: CRM ‣ Configuration

Admins tailor CRM here: rename or add **Stages**, set up **Sales Teams** and members, define **Tags** and **Lost Reasons**, and enable optional features like **Leads** and **Recurring Revenue**. Sensible defaults ship out of the box, so most teams change little. The Settings screen below groups every switch; turn on only what your team uses to keep the pipeline simple.

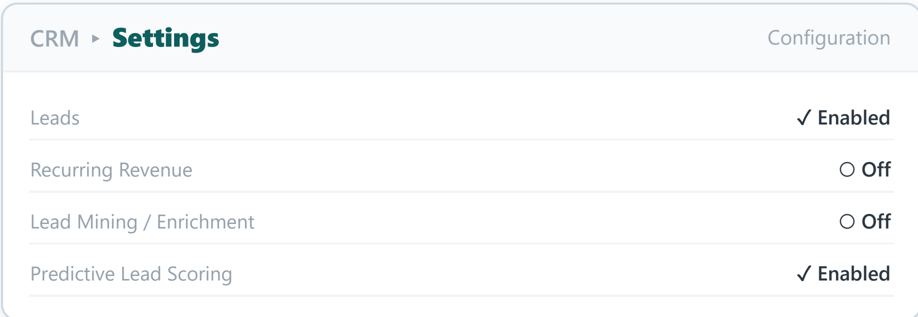

Figure 22.1 — The CRM Settings screen where optional features are switched on.

Setting	Controls
Stages	The pipeline columns and their order.
Sales Teams	Groups of salespeople and their aliases.
Tags	Labels for organising opportunities.
Lost Reasons	The choices shown when marking a deal lost.
Leads	Turn the lead "holding area" on or off.

23. Tips & best practices

The salespeople who close most consistently share a handful of habits. Here they are at a glance, then explained.

CRM — quick reference cheat sheet

⏰ **NEXT ACTIVITY** always set one	📊 **REVENUE + %** keep current	📝 **LOG CALLS** as notes	❌ **LOST REASONS** record them	✅ **ACTIVITIES VIEW** work it daily

Figure 23.1 — The five habits of consistent closers.

- **Always schedule a next activity** — a deal with no next step is a deal going cold.
- **Keep revenue & probability current** — your forecast is only as honest as these numbers.
- **Log every call as a note** — future-you (and colleagues) will thank you.
- **Record lost reasons** — patterns reveal pricing or product gaps.
- **Work the Activities view daily** — it's your prioritised to-do list.
- **Drag cards as deals move** — the board should always reflect reality.

24. Glossary

The core flow in five words: a **lead** becomes an **opportunity**, which moves through **stages** in the **pipeline** until it's **Won**.

LEAD unqualified → **OPPORTUNITY** in pipeline → **STAGES** New→Won → **WON** + Quotation

Figure 24.1 — How the glossary terms connect, lead to won.

Term	Meaning
Lead	An unqualified enquiry, before you decide to pursue it.
Opportunity	A potential deal tracked in the pipeline.
Pipeline	The kanban board of opportunities by stage.
Stage	A step a deal passes through (New, Qualified...).
Expected Revenue	The deal's value in AED.
Probability	Your confidence the deal will close (0–100%).
Activity	A scheduled call, meeting, email or to-do.
Chatter	The log of notes, emails and activities on a record.
Sales Team	A group of salespeople sharing a pipeline.
Lost Reason	Why a deal didn't close.

25. FAQ & troubleshooting

The questions new users ask most, with the quick answer:

Troubleshooting — common fixes

QUESTION	QUICK ANSWER
Move a deal forward?	Drag the card to the next column
Forecast looks wrong?	Check revenue × probability
Turn into a sale?	New Quotation → confirm
Find won/lost deals?	Filters in Reporting

Figure 25.1 — The most common CRM questions and their quick fix.

What's the difference between a lead and an opportunity?

A **lead** is raw and unqualified; an **opportunity** is a deal you're actively working in the pipeline. Convert a lead to an opportunity once it's worth pursuing.

How do I move a deal to the next stage?

Drag its card to the next column on the pipeline, or click the stage bar inside the opportunity.

My forecast looks wrong.

Check each deal's **Expected Revenue** and **Probability** — the weighted forecast multiplies the two.

How do I turn an opportunity into a sale?

Click `New Quotation`, add products and confirm it. See the Sales manual for the order-to-invoice flow.

Where did my won/lost deals go?

Won deals sit in the **Won** stage; lost deals are archived. Use the filters in Reporting to see them.

Can two salespeople share a deal?

An opportunity has one salesperson and one team, but anyone on the team can view and act on it.

Need help?

Contact your Xrero administrator or visit **xrero.com**.