

# CRM Training Guide

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## Licensed Local Contractor - Prospecting & Outreach System

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### Table of Contents

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1. [Introduction](#)
  2. [Accessing the CRM](#)
  3. [Dashboard Overview](#)
  4. [Pipeline Stages Explained](#)
  5. [Working with Contractors](#)
  6. [Managing Notes and Activities](#)
  7. [Email Outreach Workflows](#)
  8. [Follow-up Reminders](#)
  9. [Manus Agent Automation](#)
  10. [Best Practices](#)
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### Introduction

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The Licensed Local Contractor CRM is designed to manage contractor prospecting and outreach for the LLC Elite subscription program. This system helps you track potential contractors through the sales pipeline, from initial discovery to Elite subscription.

**Key Principles:**

The CRM separates **prospecting contact information** (admin-only, used for outreach) from **public listing information** (visible to homeowners). When a contractor claims their listing, their provided contact info replaces the prospecting data on the public profile.

The system is designed for **Manus agent automation**, meaning AI agents can research contractors, enrich profiles, send outreach emails, and update pipeline stages. All agent activities are logged with timestamps for your review.

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## Accessing the CRM

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Navigate to the CRM from the admin sidebar by clicking **CRM & Outreach**. You must be logged in as an admin to access this section.

URL Path	Description
<code>/admin/crm</code>	Main CRM Dashboard
<code>/admin/crm/contractor/:id</code>	Individual contractor CRM detail view

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## Dashboard Overview

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The CRM Dashboard provides a bird's-eye view of your prospecting efforts.

### Stats Cards

At the top of the dashboard, you'll see four key metrics:

Metric	Description
<b>Total in Pipeline</b>	Number of contractors actively being prospected
<b>Follow-ups Today</b>	Contractors requiring attention today
<b>Claimed Listings</b>	Contractors who have claimed their profiles
<b>Elite Subscribers</b>	Active paying Elite members

## Pipeline Stages Panel

The left panel shows all pipeline stages with contractor counts. Click any stage to filter the contractor list to that stage only.

## New Leads Panel

The center panel displays contractors in the currently selected stage. Use the search box to find specific contractors by name. Each contractor card shows:

- Company name
- Current pipeline stage badge
- Claimed/Elite status indicators
- Quick action to view full CRM detail

## Today's Follow-ups Panel

The right panel highlights contractors with follow-up reminders due today. These are your priority actions.

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## Pipeline Stages Explained

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Every contractor in the system has a pipeline stage that tracks their position in your outreach process.

Stage	Description	Typical Actions
<b>New Lead</b>	Freshly imported or discovered contractor	Research company, find contact info
<b>Researching</b>	Actively gathering information	Check website, LinkedIn, verify license
<b>Contacted</b>	Initial outreach sent	Wait for response, schedule follow-up
<b>In Conversation</b>	Engaged in dialogue	Answer questions, build relationship
<b>Sent Invite</b>	Claim invitation sent	Follow up if no response
<b>Claimed</b>	Contractor claimed their listing	Pitch Elite benefits
<b>Elite Subscriber</b>	Paying Elite member	Maintain relationship, ensure satisfaction
<b>Not Interested</b>	Declined or unresponsive	Archive, revisit in 6+ months

## Moving Between Stages

On the contractor detail page, click any stage button to move the contractor to that stage. The system automatically:

- Logs the stage change as an activity
- Updates the “Last Contacted” timestamp for contact-related stages
- Creates a historical record for your review

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## Working with Contractors

### Contractor Detail View

Click any contractor from the dashboard to open their full CRM detail view. This page contains:

## Header Section:

- Company name and current stage badge
- Claimed and Elite status indicators
- Quick links to view public profile or edit listing

## Pipeline Stage Selector:

- Visual buttons for all 8 stages
- Click to change stage instantly

## Contact Information Cards:

Card	Purpose
Public Contact Info	Email, phone, website visible on public listing
Prospecting Contact	Admin-only contact info for outreach (decision maker name, direct email, LinkedIn, etc.)

## Tabbed Content:

- **Notes** - Timestamped notes about the contractor
- **Activities** - Timeline of all interactions (calls, emails, stage changes)
- **Emails** - Email thread history (when Gmail integration is active)

## Adding Prospecting Contact Info

Click the edit icon on the Prospecting Contact card to add or update:

- **Contact Name** - Decision maker's name
- **Email** - Direct email for outreach
- **Phone** - Direct phone number
- **Source** - Where you found this info (e.g., "LinkedIn", "Website contact page")
- **LinkedIn URL** - Profile link for research
- **Best Time to Call** - Notes on when to reach them

This information is never shown publicly and is used only for your outreach efforts.

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## Managing Notes and Activities

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### Adding Notes

Notes are timestamped records attached to a contractor. Use them to document:

- Research findings
- Conversation summaries
- Important observations
- Next steps

To add a note:

1. Go to the contractor's detail page
2. Click the **Notes** tab
3. Click **Add Note**
4. Write your note and click **Save Note**

Notes can be tagged for organization and filtered by type (general, research, call, email, meeting, follow-up).

### Logging Activities

Activities create a timeline of all interactions. The system automatically logs:

- Stage changes
- Emails sent/received (when Gmail is integrated)

You can manually log:

- Phone calls made/received
- Voicemails left
- Meetings scheduled/completed

- LinkedIn messages
- Research completed

To log an activity:

1. Go to the contractor's detail page
  2. Click the **Activities** tab
  3. Click **Log Activity**
  4. Select the activity type
  5. Add a description and outcome
  6. Click **Save Activity**
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## Email Outreach Workflows

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The CRM supports two email systems for different purposes:

### Gmail (Personal Outreach)

Use Gmail for **personal outreach emails** where you expect replies. This includes:

- Initial contact emails to contractors
- Follow-up messages
- Elite pitch emails
- Relationship-building correspondence

Gmail emails appear in your regular inbox, and replies are tracked in the CRM when integration is active.

### Brevo (System Notifications)

Use Brevo for **automated system notifications** that don't require replies:

- Claim confirmation emails
- Payment receipts
- Account alerts

- Welcome emails after signup

Brevo emails are sent from a no-reply address and are not tracked in the CRM.

Email Type	Service	Expects Reply?
Initial outreach	Gmail	Yes
Follow-up	Gmail	Yes
Elite pitch	Gmail	Yes
Claim confirmation	Brevo	No
Payment receipt	Brevo	No
Password reset	Brevo	No

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## Follow-up Reminders

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Follow-ups ensure no contractor falls through the cracks.

### Creating a Follow-up

From the contractor detail page:

1. Click the + button in the Follow-ups section
2. Enter a title (e.g., “Check if they received invite”)
3. Set the due date
4. Choose priority (Low, Medium, High)
5. Click **Save**

### Managing Follow-ups

Follow-ups appear in:

- The contractor’s detail page
- The “Today’s Follow-ups” panel on the dashboard (when due)

When you complete a follow-up task, mark it as complete to remove it from your active list.

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## Manus Agent Automation

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The CRM is designed to work with Manus AI agents for automated prospecting tasks.

### What Agents Can Do

Task	Description
Research contractors	Find contact info, verify licenses, check websites
Enrich profiles	Add LinkedIn URLs, decision maker names, best contact times
Send outreach emails	Use templates to send personalized emails
Update pipeline stages	Move contractors through the pipeline based on responses
Log activities	Record all actions with timestamps
Create follow-ups	Schedule reminders for human review

### Identifying Agent Activity

All agent-created content is marked with a “**Manus Agent**” badge. This includes:

- Notes created by agents
- Activities logged by agents
- Emails sent by agents
- Follow-ups created by agents

### Reviewing Agent Work

Click **View Agent Activity** on the dashboard to see a filtered view of all agent actions. Review these regularly to:

- Verify accuracy of research

- Approve outreach before sending (if configured)
  - Catch any issues early
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## Best Practices

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### Daily Workflow

1. **Check Today's Follow-ups** - Start each day by reviewing contractors needing attention
2. **Process New Leads** - Move new contractors to "Researching" and begin gathering info
3. **Review Agent Activity** - Check what Manus agents accomplished overnight
4. **Send Outreach** - Contact contractors in the "Researching" stage who have complete profiles
5. **Update Stages** - Move contractors based on responses received

### Note-Taking Tips

- Be specific and factual
- Include dates and names
- Note the source of information
- Record both positive and negative signals
- Summarize conversations immediately after

### Pipeline Hygiene

- Don't let contractors sit in one stage too long
- Set follow-ups for every active prospect
- Move unresponsive contractors to "Not Interested" after 3-4 attempts
- Revisit "Not Interested" contractors every 6 months

## Email Best Practices

- Personalize every outreach email
  - Reference something specific about their business
  - Keep initial emails short (under 150 words)
  - Include a clear call to action
  - Follow up within 3-5 business days if no response
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## Quick Reference

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### Keyboard Shortcuts

Currently, the CRM does not have keyboard shortcuts. Navigation is mouse/touch-based.

### Common Tasks

Task	Location
Find a contractor	Dashboard search box
Change pipeline stage	Contractor detail → Stage buttons
Add a note	Contractor detail → Notes tab → Add Note
Log a call	Contractor detail → Activities tab → Log Activity
Create follow-up	Contractor detail → Follow-ups → + button
View agent activity	Dashboard → View Agent Activity

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## Support

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For questions about the CRM system, contact the site administrator.

For technical issues, check the browser console for errors and report them with screenshots.

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*This guide is maintained by the Licensed Local Contractor team. Last updated January 2026.*