




Funnela

Getting Started Guide

Funnela is a simple and intuitive web-based CRM, dedicated for small businesses. It supports communication with customers, collaboration and data sharing across your company.

NOTE:

All information covers both free and paid plans. In case of free plans, there will be no ability to receive e-mails from your e-mail accounts attached to Funnela. Below are listed differences between free and paid accounts.

	Free plan	Paid plans
Max number of users	1	According to selected plan
Ability to receive e-mails from your e-mail accounts	-	
Separated, dedicated e-mail system	-	
Enhanced security through SSL	-	
Monthly fee	Free	From \$15 / month

How to get started?

1. Log in to Funnela using your login and password as entered in signup process.

2. Add e-mail account

Administrator can add new e-mail accounts and attach them to particular users. To this end, follow these steps:

- a) Choose "Settings" menu in upper right corner of the screen
- b) Choose "Mail accounts" menu
- c) Choose "Add new account" button
- d) Fill all fields - type general information and both incoming and outgoing e-mail server. It's the same information, which you have to type while configuring popular e-mail applications like Outlook Express or TheBat!

If you don't know what you have to type, contact your administrator or your e-mail services provider. You can also contact with us – we'll try to help you.

- e) Choose which users can use this e-mail account and select access rights (only receiver, only send or both this rights). You can find more information on adding new users in 3rd paragraph.
- f) Choose "Save" button
- g) Close settings window ("X" in upper right corner of the settings window)

3. Personalize e-mail account

Each of users can personalize his e-mail accounts. To this end, follow these steps:

- a) Choose "Settings" menu in upper right corner of the screen
- b) Choose "My accounts" menu
- c) Pick an account to personalize and choose "Edit" link
- d) Fill sender description field – it's description which is shown to your e-mail's recipient in column "From" or "Sender"
- e) We strongly recommended to leave field "Sender address" unchanged
- f) Fill your signature - it will be displayed under all your messages
- g) Choose "Save" button
- h) Close settings window ("X" in upper right corner of the settings window)

4. Add new users

Administrator can add new users and attach them to particular e-mail accounts. To this end, follow these steps:

- a) Choose "Settings" menu in upper right corner of the screen

- b) Choose "Users" menu
- c) Choose "Add new user" button
- d) Fill fields with general information and choose a password for this user
- e) Choose user's privileges – by default it's "Regular user"
- f) Choose e-mail accounts which can be used by this user and select access rights (only receive, only send or both this rights).
- g) Choose "Add" button to add new user
- i) Close settings window ("X" in upper right corner of the settings window)

5. Import your contacts

Each user can import his own contacts . To this end, follow these steps:

- a) Choose "Contacts" module from main menu of application (blue bar)
- b) Choose "New Group" button from second level of main menu button
- c) Enter name for new group and select "OK" button
- d) Choose "Settings" menu in upper right corner of the screen
- e) Choose "Import contacts from CSV" menu
- f) Select file to import, choose it's encoding and select how many of first lines are header. You have to select target contacts group too.
- g) In next step Funnela will try to recognize types of data in columns. In the "Header/samples" column you will see some data from your file. This will allow you, if necessary, correct matching types of data to columns.
- h) After matching types of data choose "Finish import" button. Contacts will be imported.
- j) Close settings window ("X" in upper right corner of the settings window)

More information about importing contact data you can find on our blog:

<http://funnela.com/blog/index.php/2009/03/211/new-feature-contacts-import>

Funnela is now ready to work.

Got questions?

We look forward to helping you find the answer.



Product support

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