

Getting Started

Platform: 1Stream CRM
Version: 14,0
Audience: Administrators



What is 1Stream CRM?

1Stream CRM is an all-in-one solution for businesses looking to grow revenue, improve service & build customer loyalty. 1Stream CRM caters for all Sales, Service, Marketing and Telephony needs in one place.

Course Outline

Getting Started

- Log In
- Navigate the Home Screen
 - Conversations
 - Activities
 - Profile Settings
- Navigate Applications
 - Search
 - Favourites
 - Documents
 - Export and Import Data
- Navigate Activities in an Application
- Navigate Display Views



Course Outline

Getting Started

- Navigate “Discuss”
 - Inbox/Starred/History
 - Channels
 - Direct Messages
- Navigate “Contacts”



Course Outline

Add and Remove Users

- Add and Remove Users
 - Access Rights
 - Add a User
 - Send Password Reset Instructions
 - Remove a Users



Course Outline

Two Factor Authentication

- Two Factor Authentication
 - What is 2FA
 - Authenticator Applications
 - Enabling 2FA
 - Log in using 2FA



Course Outline

1Stream Support

- Logging a Service Request
- Service Levels
- Priorities





THANK YOU

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1STREAM
simplicity at work