Overview of the CRM

Lara Proud - 2023-02-16 - Comments (0) - How-to Videos

The CRM, or Customer Relationship Management System is a component of Deskpro where all the data regarding your Users and Organizations is stored. From the CRM you can see a complete history of a User or Organizations communications with your helpdesk and see all of their tickets consolidated into one area.

The introductory video below gives you an overview of the CRM and how you can view and manage your User and Org information when you're in Deskpro.

Introduction Video:

Check out the videos on the different parts of the CRM in the Customer Relationship Management chapter of the product tour on our website. And you can also read some of our suggested reading around the CRM component to learn more about how you can use this aspect of Deskpro.

Further reading:

- Introduction to the CRM
- Browsing the CRM
- Searching the CRM
- Usergroups