

Formata

User Guide

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About this document

This guide describes how a user works with the Formata CRM application included in Formata version 1.6.0: signing in, the layout of the working window, lists and cards, and the main operations with customers, leads, deals, tasks, documents and the warehouse.

It is written for sales and warehouse staff and for managers. Menu items, fields and buttons are named as they appear with the English interface language in the product as delivered; the customer's administrator can change forms and menus, in which case the screens will differ.

1. Purpose

Formata CRM is used to keep a database of companies and contacts, record requests (leads) and deals, plan tasks, store documents, correspond with customers, and track warehouse stock and payments.

The sections and actions available depend on the roles assigned by the administrator: menu items and forms you have no rights to are not shown or open for viewing only.

2. Working conditions

- Workstation: a computer with Google Chrome or Microsoft Edge and network access to the product server.
- The product address, login and password are issued by the administrator.
- The product runs in a browser tab; nothing has to be installed. The browser may offer to install it as an app; this does not change the functions.
- No special training is required beyond everyday use of a browser.

3. Getting started

3.1. Signing in

1. Open the product address in the browser.
2. On the sign-in screen choose the language in the Language field and fill in Username and Password.
3. Click Sign in.

After five failed attempts in a row, sign-in for that login is blocked for a period set by the administrator (10 minutes as delivered).

3.2. The working window

- The main menu is on the left. As delivered it contains Messages, Mail, Dashboard, Companies, Contacts, Leads, Deals, Board, Documents, Tasks, Analytics, Reports, Import, Budgets, the Warehouse section and administration items.
- Every form opens in a tab. No more than six tabs are open at once: when a seventh is opened, the tab that has been unused longest is closed; tabs with unsaved changes are never closed automatically. Choosing a form that is already open returns you to its tab.
- Right-clicking a tab offers Close other tabs and Close all tabs; a middle click closes the tab.
- The Notifications button with a bell icon opens the list of notifications; Mark all read clears the unread marks.

- Dashboard shows the number of companies, open leads and deals, the amount of won deals and the My open tasks list.

3.3. Guided demo

If you tick Show the guided demo after sign-in on the sign-in screen, a scenario chooser opens after sign-in: Formata CRM tour, Sales path: lead → deal → analytics, Architecture & requirements, Designer & capabilities. The demo opens forms and highlights elements by itself. Next → moves to the following step, Pause stops automatic playback, Exit or the Esc key ends the demo.

4. Main operations

4.1. Working with lists

1. Open a list from the menu, for example Companies.
2. To sort, click a column heading; a second click reverses the order.
3. To filter, click Filter above the table and type a value under the heading of the column you need. The reset button removes all filters.
4. Use the buttons under the table to move between pages; the page number and the total number of rows are shown there.
5. Double-click a row to open the record card.

4.2. Companies and contacts

Adding a company:

1. Open Companies and click + Company.
2. Fill in Name, Tax ID, Industry, City, Phone and Website, and choose the responsible person in the Manager field.
3. Click Save.

A contact is added in the same way: Contacts → + Contact, with the fields Last name, Name, Position, Company, E-mail and Phone. On the contact card the Companies and roles table links the contact to several companies. Compose email opens a message form addressed to the contact.

4.3. Leads

Recording a request:

1. Open Leads and click + Lead.
2. Fill in Request, Contact, Company, Source, E-mail, Phone and Budget, and choose Status and Manager.
3. Click Save.

Scoring a lead: on the card click Score with AI. The product writes a score from 0 to 100 to the AI score field and shows an explanation. Depending on the server configuration the score is calculated by built-in rules or by an external AI service.

Converting to a deal: on the lead card click Convert to deal. The product finds the company by name or creates it, creates a contact and a deal and reports the deal number. The same lead cannot be converted twice.

4.4. Deals

1. Open Deals and click + Deal, or open an existing deal with a double click.
2. Fill in Name, choose Pipeline and Stage, enter the amount, Expected close, Company, Contact and Manager.
3. Click Save.

Notes:

- the list of stages depends on the chosen pipeline;
- when a deal is moved to a lost stage, Lost reason is mandatory;
- a closed deal can be reopened only by a user with the `admin` or `manager` role;
- + Note/Activity adds an entry to the Activities timeline;
- the deal card gives access to its documents and attachments.

Board shows deals as cards arranged by pipeline stage. To change the stage, drag the card to another column with the mouse.

4.5. Tasks

1. Open Tasks and click + Task.
2. Fill in Name, choose Type (call, meeting, email, to-do), Status and Priority, and set Due date and Assignee.
3. If needed, link the task to a company, contact and deal and fill in Description.
4. Click Save.

The set of statuses depends on the task type. The assignee receives a notification about overdue tasks.

4.6. Documents

1. Open Documents and click + Document.
2. Choose Type and Status and enter Date, Company, Deal, Contact, Amount and Currency.
3. Click Save. The number is assigned automatically.
4. Attach files in the Document files field.

4.7. Analytics and reports

- Analytics shows the forecast, the amount of open deals, the win rate, the average deal cycle, the funnel by stage, manager workload and plan fulfilment for the current month.
- Reports opens the deal report. The Pipeline, Manager and Period filters take effect as soon as a value is chosen.

4.8. Importing companies and leads

1. Open Import.
2. In the Import into field choose companies or leads.
3. Paste text into the CSV field; the first line holds the column names. For leads:
`title,company_name,contact_name,email,phone`; for companies: `name,city,phone,industry`.
4. Click Import.

4.9. Mail and messages

- Mail shows the messages of connected mailboxes. You can compose, reply and forward, and work with attachments. Mailboxes are connected in the Mailboxes form.
- Messages holds direct and group chats between employees. A file can be attached to a message, and a message can be edited or forwarded. Voice calls are not supported.

4.10. Warehouse

Creating a warehouse document:

1. In the Warehouse section open Goods movement and click + Add. For a sale use the Sale item.
2. In the header choose Operation and Warehouse, for a transfer also Receiving warehouse, enter Date and Counterparty, and click Save.
3. Add lines: From stock picks from existing stock, From catalog picks from the product list, Work adds a work or service.
4. Change the document state: Reserve reserves the goods, Post changes the stock, Unpost cancels posting.
5. Click Print and double-click the required form in the Print document window. The forms applicable in the country of the document and the universal forms are listed.

Stock changes only through documents. Stock shows the posted quantity, the reserve and the available quantity by warehouse, batch and bin. Negative stock lets you create a receipt for items whose balance has gone below zero.

4.11. Budgets

Budgets opens the list of budgets with plan, actual and remaining amounts. + Budget creates a budget; other buttons show settlements by customer and the change journal. A payment is entered on the budget card in the Post payment window, with an account and a date.

5. Messages and common difficulties

Many messages that come from the server are shown in Russian regardless of the interface language; the table gives their meaning.

Message or symptom	Cause	Action
Sign-in is rejected (wrong login or password)	A mistake in the login or password, or the account is deactivated	Check the keyboard layout and letter case; contact the administrator
Sign-in is rejected with a notice about too many failed attempts	A temporary sign-in lockout was triggered	Try again after the time stated in the message
Session expired — sign in again	The sign-in has expired or the service was restarted	Sign in again; unsaved changes in open forms may be lost
Check the highlighted fields	Mandatory fields are empty or a value failed validation	Correct the highlighted fields and save again
save error, script error	The server rejected the operation	Read the message text; if the cause is unclear, give the administrator the text and the time
Offline — the save is queued	There is no connection to the server	Keep working; when the connection returns, a notice that offline actions were synced appears

Message or symptom	Cause	Action
A menu item is missing or form fields cannot be edited	Insufficient rights	Contact the administrator
A tab closed by itself	The limit of open tabs was exceeded	Open the form again from the menu
Labels are shown as keys of the form @t:..., or the chosen language is not applied	The browser still holds a previous version of the shell	Reload the page with Ctrl+F5; if that does not help, contact the administrator

If two users edit the same record at the same time, the fields changed by whoever saves last are kept. Reopen a card that has been open for a long time before editing it.

Changes made to lists by other users appear in an open tab without reloading the page.

6. Finishing work

1. Save the changes in open cards.
2. Click Sign out in the working window.

Closing the browser tab without signing out also ends the sign-in: you will have to sign in again to continue.

Document history

Document version	Date	Product version	Change
1.0	2026-10-06	1.6.0	First issue