

How to Add a Customer and Company to Selling Lane CRM

written by Jude Campbell | October 13, 2023



- First step is always to search for the customer first to make sure that you already haven't added him or her into the CRM.
- After you've searched and found the customer, the software will automatically allow you to add first name last name, etc.
- Once the basic details are in, go back in and tweak the customer, adding details like cell phones, additional email, addresses, physical addresses company, names, and titles at the company.
- Once you've added the company, you can edit that information and add more details such as business address, business URL, etc.

below is a brief video explaining the process mentioned above.

Short explanation video, on how to add a company and customer

How to Sign in to Selling Lane CRM

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- Go to Selling Lane CRM : <http://sellinglane.com/>

- Click on the Sign-In menu item:



- Use the Sign in with Google button or
- log-in with your email and password
- and you're done

Short explanation video, on how to Sign Into Selling Lane

[Super Affordable CRM Software for Small Business](#)

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Hey there, small business owners! ☐ We get it. Running a business is no small feat, especially when you're juggling customer relationships, managing tasks, and trying to keep everything organized. But what if we told you there's a tool that can lighten the load and won't break the bank, an affordable CRM software for Small Business? Enter the world of Selling Lane CRM solutions, specifically crafted for startups and growth businesses like yours!

Why We Focused on Being the Affordable CRM Software for Small Business?

When we started our company, the owners cleared out their 401(k)s and reinvested their children's college funds to get started, knowing that their dream was a good idea. The risk was high, but the reward could be higher, and when we started, we were looking for affordable tools to help us grow our business. And quite frankly admired companies that had start a pricing that

was affordable and sustainable for the long run. That's why we decided to give a [31 day free trial](#) and then keep it at [\\$6 a month per user](#), if you wanted all the features, the whole thing [only costs \\$12 a month](#).

We also believed strongly that, Customer Relationship Management (CRM) isn't just a fancy tech term. It's your new best friend in business. Imagine having a **super-organized assistant** who keeps track of all your customer interactions, manages your appointments, and even helps you with invoicing. That's what a good CRM does – it organizes your chaos into a streamlined, manageable process.



Mary Barra

[Mary Barra](#), the trailblazing CEO of General Motors, eloquently stated, “Do not confuse activity with productivity.” This nugget of wisdom is not just applicable to the automotive industry, but resonates profoundly with small businesses in various sectors. In the context of utilizing a Customer Relationship Management (CRM) system, her words take on a special significance. A CRM doesn't merely facilitate a hive of activity; it ensures that every action taken is a deliberate, strategic step towards tangible growth and enhanced customer satisfaction.

When every minute counts, the distinction between mere activity and genuine productivity becomes pivotal. A well-implemented CRM, like [Selling Lane](#), doesn't just offer a platform for organizing customer data and scheduling appointments. It becomes a strategic partner, aligning every customer interaction, every follow-up, and every service delivery with the broader goals of the business. It ensures that the time and resources invested are not just keeping the wheels turning but are propelling the business forward, creating satisfied customers, and fostering sustainable growth. In essence, it translates the hustle and bustle of daily operations into a symphony of strategically aligned, customer-centric activities, embodying the essence of true productivity.

Affordability Meets Functionality of an Affordable CRM for Small Business

But let's talk money. Small businesses often operate on tight budgets, and every penny counts. That's where affordable CRM solutions, like [Selling Lane](#), come into play. With plans starting at just [\\$6 per user per month](#), you get access to a plethora of features designed to elevate your business without elevating your costs.

Selling Lane: Your Pocket-Friendly Powerhouse

[Selling Lane](#) isn't just a CRM; it's a holistic solution designed with small businesses in mind. From easy scheduling and route optimization to effective customer relationship management and innovative menu selling features, it's packed with tools to propel your business forward.

Free Business Website: Elevate Your Online Presence



In the digital era, having an online presence is not just an option but a necessity. With Selling Lane, you get a free business website that's not only sleek and professional but also SEO-enhanced to ensure you get found by potential customers online. Your services, products, and unique offerings are showcased in a vivid gallery, while a map and directions guide customers straight to your door. Engaging call-to-action forms convert visitors into valuable leads, and a dedicated section to highlight your team and customer testimonials builds trust and credibility in your brand. Plus, with easy links to your social and rating sites, you ensure your business is connected and reviewed positively.

Menu Selling: Simplify Choices, Maximize Sales



Selling Lane takes a unique approach to upselling and cross-selling through its innovative Menu Selling feature. This feature allows you to present a digital menu of your services and products to clients, simplifying their choices while maximizing your sales opportunities. For instance, while discussing a particular service, you can effortlessly introduce related services or products, transforming potential indecision into lucrative upselling or cross-selling opportunities. It's not just selling; it's enhancing customer experience by providing them with easy, straightforward choices and solutions tailored to their needs.

Easy CRM: Streamline Customer Interactions



Managing customer interactions, nurturing leads, and fostering loyal relationships become a breeze with Selling Lane's Easy CRM. It's designed to be intuitive and user-friendly, ensuring that you can manage your customer interactions without getting bogged down by complex processes. From the first interaction to ongoing communications, the CRM ensures every touchpoint with your customers is recorded, organized, and easily accessible, enabling you to build and maintain relationships that not only satisfy but delight your customers, steering your business towards sustainable growth.

Easy Task Management: Turn Chaos into Clarity



In the realm of task management, simplicity and efficiency are king. Selling Lane's Easy Task Management adheres to the principles of Getting Things Done (GTD), providing tools that help you streamline, prioritize, and execute tasks with utmost efficiency. It turns the potential chaos of juggling various tasks into a clear, organized, and manageable workflow. Every task, from the most critical to the routine, is tracked, managed, and executed seamlessly, ensuring nothing falls through the cracks and every opportunity

is capitalized upon.

[Easy Invoicing: X2 Your Payment Times](#)



Navigating through the billing and invoicing process should not be a complex maze. Selling Lane's Easy Invoicing feature ensures that you can send out invoices and receive payments swiftly and securely. It's designed to turn your invoices into instant payments, significantly speeding up your customer payment process and enhancing cash flow. With a streamlined billing process, you ensure that your business operates smoothly, and financial management becomes not a hurdle but a facilitator of your business's financial health and sustainability.

And the cherry on top? [A 31-day free trial](#) to get you started on your journey towards organized, sustainable growth.

Conclusion: Small Investment, Big Returns

Investing in an affordable CRM software for small business like Selling Lane isn't just a cost-effective decision. It's a strategic move towards building a more organized, efficient, and customer-friendly business. As Indra Nooyi, former CEO of PepsiCo, wisely stated, "If you don't give people a chance to fail, you won't innovate." So, take a chance, innovate your processes, and watch your business flourish with the right CRM by your side.

Ready to take the plunge into a world where organization meets affordability? Start your free trial with Selling Lane today and unlock the doors to seamless, scalable business management.

Everything you need to grow your thriving business. Get higher quality leads, close more deals and manage customers all in one place with Selling Lane CRM Try For Free [Get Sellinglane CRM](#) No credit card needed

10 CRM Mistakes to Avoid, Like a Boss Should

written by Jude Campbell | October 13, 2023



Customer relationship management (CRM) software is a powerful tool that can help businesses of all sizes improve their sales, marketing, and customer service operations. But let's be real, CRM can be a bit of a beast to tame and full of CRM Mistakes.

“If you don't know where you're going, any road will take you there.”

– [Lewis Carroll](#)

That's Why it's Important to Avoid These Common CRM Mistakes:

1. **Not having a plan.** Before you jump into CRM especially [Selling Lane](#), take some time to think about your business goals and how CRM can help you achieve them. What specific problems are you trying to solve? What processes do you want to automate? Once you have a clear plan, you can choose the right CRM system for your needs and develop a plan for implementation.
2. **Ignoring the end users.** Your sales reps and customer service reps are the ones who will be using the CRM system on a daily basis, so it's important to get their input on what they need and how the system should work. This will help ensure that the system is adopted and used effectively.
3. **Not training users properly.** Once you've implemented your CRM system, don't just throw your team to the wolves. Provide them with adequate training, so they can learn how to use the system effectively and get the most out of it.
4. **Not entering data regularly.** CRM software is only as good as the data that's entered into it. Make sure to enter customer data regularly and accurately. This will ensure that you have a complete and up-to-date view of your customers and their interactions with your business.
5. **Not using the system to its full potential.** Many businesses only use CRM software for basic tasks, such as contact management and lead tracking. But CRM software can be used for a variety of other tasks, such as sales pipeline management, opportunity forecasting, and customer segmentation. Take the time to learn about all the features of your CRM system and how you can use them to improve your business.
6. **Not integrating CRM with other systems.** CRM software can be integrated with other systems, such as marketing automation software and e-commerce

platforms. This integration can help you automate workflows and streamline your business processes.

7. **Not reporting on CRM data.** CRM software can generate a variety of reports that can be used to track your progress and identify areas for improvement. Take the time to review your CRM reports regularly and use them to make informed decisions about your business.
8. **Not keeping data up-to-date.** As your business grows and changes, it's important to keep your CRM data up-to-date. This includes removing outdated data and adding new data as it becomes available.
9. **Not using CRM for customer service.** CRM software can also be used to improve customer service. For example, you can use CRM to track customer support tickets and interactions. This can help you provide better customer service and resolve issues quickly and efficiently.
10. **Not measuring the ROI of CRM.** It's important to track the return on investment (ROI) of your CRM system. This can be done by tracking key metrics such as sales, customer satisfaction, and customer retention. By measuring the ROI of your CRM system, you can determine whether or not it's paying for itself.

"The best way to predict the future is to create it."

– [Peter Drucker](#)

Bonus tip: Don't be afraid to experiment with your CRM system. Try different features and see what works best for your business. And don't be afraid to ask for help from your CRM vendor or other CRM users.

By avoiding these common CRM mistakes, you can set yourself up for success.

Try Free for 31 Days

[Get Sellinglane CRM](#)

No credit card needed to try

QuickBooks and Selling Lane CRM, Do You Need Both?

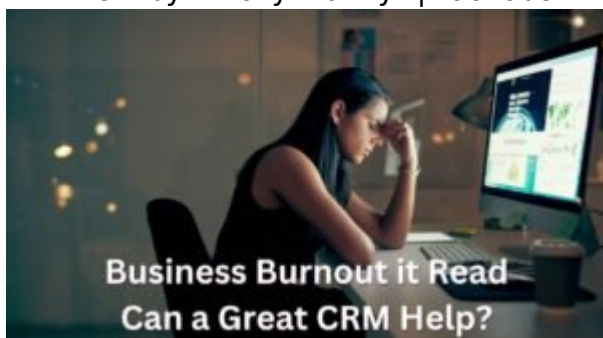
written by Vicky Barry | October 13, 2023



Using both of these tools is a good idea. However, if you're on a tight budget or only have a small number of customers, then you may be able to get away with using just Selling Lane CRM, because it includes Invoicing and Link to Pay, which is a key ingredient of Quick Books.

Important: Business Burnout is Real, a CRM Can Help?

written by Vicky Barry | October 13, 2023



A CRM (Customer Relationship Management) system can be a lifesaver for business owners feeling the heat of burnout.

[How Do I Apply Old School Methods to a Modern CRM?](#)

written by Vicky Barry | October 13, 2023



Applying old-school wisdom to modern technology is a incredible method of growth

[Flourish or Fail with CRM: Simple Wisdom for Businesses](#)

written by Vicky Barry | October 13, 2023



Old school wisdom is sometimes the best, especially when applied to new technologies, such as small business CRM

[How to Get an Awesome Business Website, Without Breaking The Bank!](#)

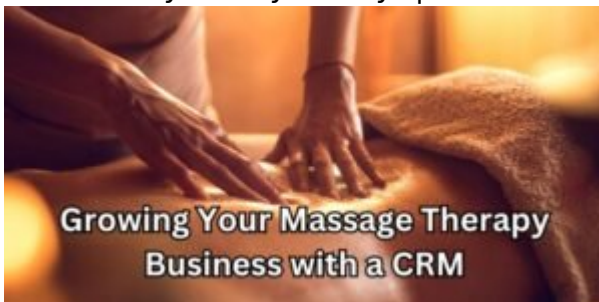
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If you've got a business, you need a website. It's like your online shop where people can visit, look around, and get to know you, even when you're sleeping!

[How to Grow Your Massage Therapy Business with CRM](#)

written by Vicky Barry | October 13, 2023



or massage therapists, whose work is to alleviate stress and promote wellness, having a business that runs smoothly in the background is paramount.