

EspoCRM For Beginners

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Managing customers, contacts, and day-to-day activities can quickly become overwhelming, especially as a business grows. Important emails get missed, notes are spread across different tools, and it becomes hard to see who is working on what. Without one clear system, teams can lose track of conversations, tasks, and opportunities.

EspoCRM is an easy-to-use platform that helps businesses keep everything in one place. It allows teams to store contact details, record emails and calls, track tasks, and follow progress all from a single system. Instead of juggling spreadsheets and inboxes, EspoCRM gives everyone a clear view of customers and ongoing work.

Designed to be flexible and simple to get started with, EspoCRM grows alongside your business. As needs change, new features, automation, and workflows can be added without replacing the system. This helps teams stay organised, work better together, and build stronger relationships, making EspoCRM a practical starting point for businesses new to CRM.

EspoCRM Dashboards

Home

Calendar

CRM

Enquires

Contacts

Accounts

Meetings

Jobs

Opportunities

Sales

Quotes

Invoices

Sales Orders

Products

Activities

Emails

Tasks

Enquires

All -

212

New

Assigned

In Process

Recycled

Dead

Joe Bushnell
enable.services

Jeff Bezos
Amazon
jb@amazon.com

James Blease
enable
jbleese@enable.services
Nord Herida

Carol George
Calm Sailing Inc
carol.george@yahoo.co.uk
Sally Thomas

Julia Watkins
Complete Holding
julia.watkins@gmx.co.uk
680f8686e4e00899c

Theresa Daniels
Smallville Resources Inc
theresa.daniels@gmx.co.uk
Joseph Bushnell

Katherine Austin
AD Importing Company Inc

Gloria Reyes
QR&E Corp
gloria.reyes@aol.co.uk
Sally Thomas

Amanda Stephens
T-Cat Media Group Inc
amanda.stephens@yahoo.co.uk
Sally Thomas

Jacqueline George
Smith & Sons
jacqueline.george@yahoo.co.uk
Sally Thomas

Ann Banks
Draft Diversified Energy Inc
ann.banks@web.co.uk
Sally Thomas

Frances Hart
Pullman Cart Company

Irene Vasquez
360 Vacations
irene.vasquez@web.co.uk
Sally Thomas

Ann Gutierrez
247 Couriers
ann.gutierrez@aol.co.uk
Sally Thomas

Beverly Daniels
Dirt Mining Ltd
beverly.daniels@web.co.uk
Sally Thomas

Virginia Vasquez
X-Sell Holdings

Linda Carroll
Avery Software Co
linda.carroll@hotmail.co.uk
680f8686e4e00899c

Annie Shaw
Riviera Hotels
annie.shaw@outlook.co.uk
680f8686e4e00899c

Amy Wagner
Grow-Fast Inc
amy.wagner@yahoo.co.uk
680f8686e4e00899c

Evelyn Carr
Pullman Cart Company
evelyn.carr@outlook.co.uk
680f8686e4e00899c

Bonnie Sims
JBC Banking Inc

Home

Calendar

CRM

Enquires

Contacts

Accounts

Meetings

Jobs

Opportunities

Sales

Quotes

Invoices

Sales Orders

Products

Activities

Emails

Tasks

Accounts

All -

1-50 / 128

Name

Website

Type

City

Assigned U...

sportsafe

Prospect

toysrus

Prospect

Draft Diversif...

www.draftdiversified...

Prospect

Birmingham

Sally Th...

enable

Prospect

Tesla

Prospect

Joseph ...

enable

Customer

Hepco Motion

www.hepcotion.c...

Prospect

BBC

bbc.co.uk

Prospect

EnableIT Tec...

enable.services

Prospect

Sea Region Inc

www.searegioninc.c...

Prospect

Leeds

Sally Th...

Riviera Hotels

www.rivierahotels.co...

Prospect

Leeds

Sally Th...

Rubble Group...

www.rubblegroupinc...

Prospect

Birmingham

Sally Th...

Q3 ARVRO III ...

www.q3arvroiii.co...

Prospect

Birmingham

Joseph ...

Map

Satellite

United Kingdom

Isle of Man

Super Star Holdings Inc

QR&E Corp

Tracker Com LP Inc

P Piper &

Liverpool

Blackpool

Great Britain

Stoke-on-Trent

Derby

Nottingham

Wolverhampton

Birmingham

Southern Realty It Corp. Inc

Underwater Mining Inc.

Cheltenham

Swindon

Cardiff

Bristol

Newport

London

T-Squared Techs

Map data ©2025 GeoBasis DE/BKG (©2019), Google

Terms

Report a map error

Home

Calendar

CRM

Enquires

Contacts

Accounts

Meetings

Jobs

Opportunities

Sales

Quotes

Invoices

Sales Orders

Products

Activities

Emails

Tasks

Sales Analytics

My Activity

...

Opportunities by lead source and user

Count 830

Amount Weighted £7.69M

Empty

James Blease

Joseph Bushnell

Nord Herida

Philippa

Sally Thomas

Empty

Call

Email

Web Site

Campaign

Existing Customer

Partner

Other

Opportunity By Stage

Amount £178k

Count 9

Prospecting

Qualification

Proposal/Price Quote

Closed Won

Empty

Perception Analysis

Negotiation/Review

Closed Lost

James

admin

Calls by account and user

0

Sales by Month

£100k

Opportunities by user

150

100

50

0

James Blease

Joseph Bushnell

Nord Herida

Philippa Meadows

Sally Thomas

Home

Calendar

CRM

Enquires

Contacts

Accounts

Meetings

Jobs

Opportunities

Sales

Quotes

Invoices

Sales Orders

Products

Activities

Emails

Tasks

Marketing

Admin

Reports

Import

Projects > Important Project

Star

Followed

Detail

Plan

Board

Gantt

+ Create Task

...

▼ This Week

1 + ...

Name

Stage

Assignee

Timeline

Priority

Dependent On

Planning Marketing

To Do

28 Jul, 2025 - 01 Aug, 2025

Normal

▼ Next Week

1 + ...

Name

Stage

Assignee

Timeline

Priority

Dependent On

Roll out to testing users

To Do

04 Aug, 2025 - 05 Sep, 2...

Normal

Planning Marketing

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enable.services EspoCRM

enable.services Overview

Real people, **real solutions**, real results

LOCATION. Ipswich, United Kingdom

EST. 1994 Family Run

TEAM SIZE. 48 employees

CSAT SCORE.  Based on past 3 yrs.



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OUR SOLUTIONS AND CORE PARTNERSHIPS

CUSTOMER RELATIONSHIP MANAGEMENT
CASE & ISSUE MANAGEMENT
TASK & PROJECT MANAGEMENT
MARKETING AUTOMATION



IT AND NETWORK
SUPPORT SERVICES



Since
1994

AUTOMATION PLATFORMS



Since
2017

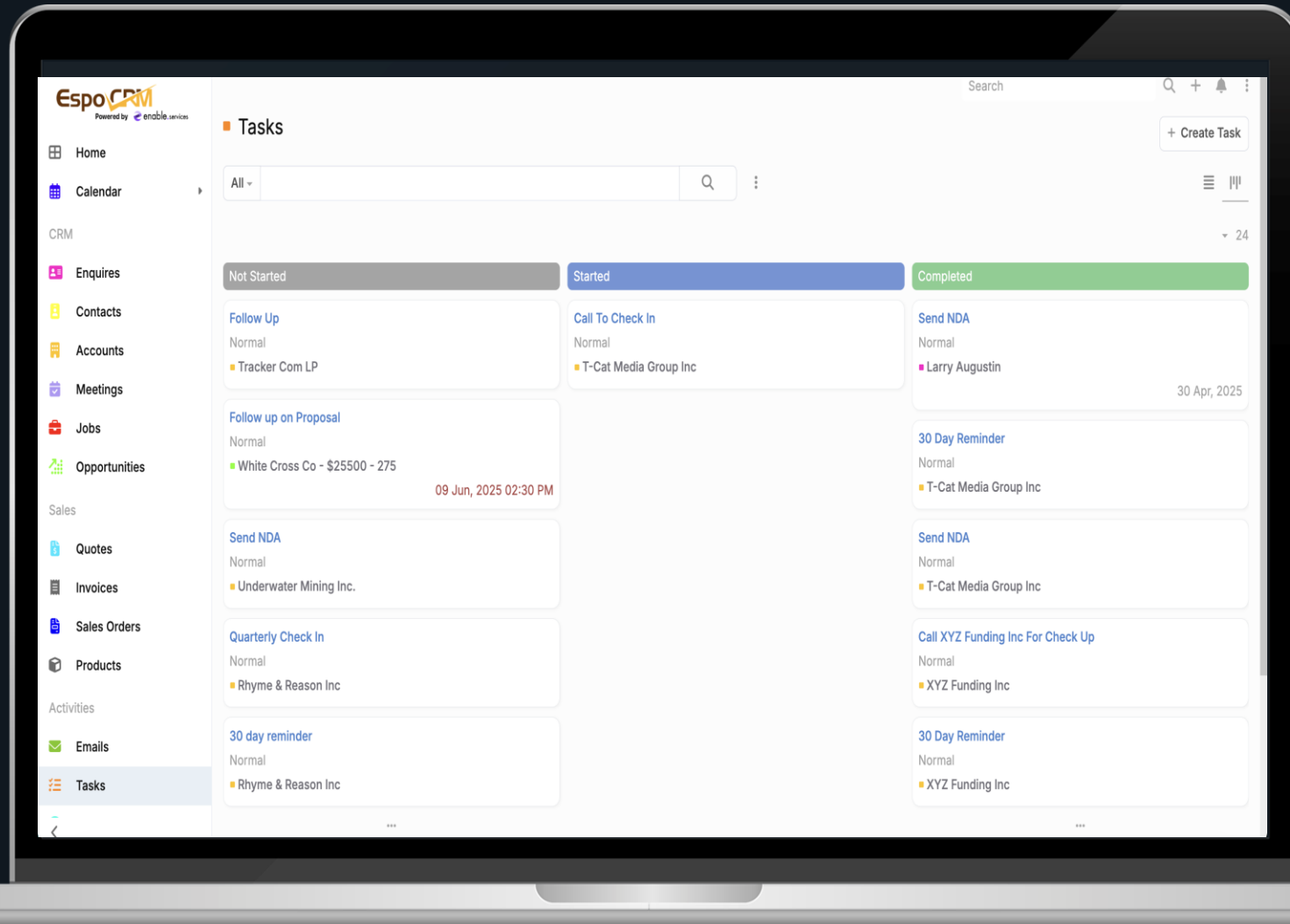


Since
2023



Since
2021

EspoCRM User Interface



- **User-Friendly Interface** –
A clean, intuitive interface is crucial for ease of use and adoption.
- **Highly Customisable Layout** –
Being able to tailor the system to specific business needs is a top priority.
- **Workflow & Automation Integration** –
Automating tasks saves time and improves efficiency.
- **Inline Editing for Efficiency** –
Quick edits without navigating away improve productivity.
- **Role-Based Access Control** –
Ensuring data security and access control is critical for businesses.
- **Dynamic Panels & Relationships** –
Helps organise related data effectively within records.
- **Real-Time Data Updates** –
Keeping information up-to-date is essential for accuracy.
- **Mobile-Friendly & Responsive Design** –
Accessibility on different devices enhances flexibility.
- **Tabbed Interface for Better Organisation** –
Reduces clutter and makes navigation smoother.
- **Dashlets & Widgets** –
Custom widgets provide quick insights but are more of an enhancement than a necessity.



Sales Management

- Keep all your leads and sales opportunities organised in one clear, easy-to-follow sales pipeline
- Set up sales stages that match how your business sells, so it reflects your real-world process
- Automatically handle everyday sales tasks, such as follow-ups and updates, saving time and reducing manual work
- See exactly where each deal stands with simple status updates, labels, and likelihood indicators
- Manage incoming sales enquiries and requests in one place, from first contact through to handover
- Give customers and partners secure access to shared information through online portals
- Use ready-made templates and examples to create opportunities and follow consistent sales processes
- Control who can see or edit sales information with simple user roles and permissions
- Store and share sales guides, product details, and best practices in one central knowledge hub

Analytics And Reporting

- Leverage powerful analytics and reporting to gain clear, actionable insights
- Evaluate event performance using Custom Reports
- Monitor key metrics in real time with Report Panels and Dashlets
- Export reports to Excel and CSV for further analysis and sharing
- Automate report distribution by scheduling results to be sent via email

Client Support

- Deliver better client support with streamlined service tools
- Provide self-service portals where clients can submit questions and requests
- Control access to EspoCRM data using configurable portal roles
- Track and manage all issues with full case history in the Cases module
- Automatically create cases from emails using the Email-to-Case feature

Sales Cycle Automation

- Streamline your process with sales cycle automation from lead to close
- Track and prioritise opportunities to focus on the most valuable deals
- Automate the creation and sending of quotes, sales orders, and invoices
- Manage products and services using configurable product catalogues
- Customise your sales pipeline with Entity and Layout Managers to match your sales process
- Forecast future revenue accurately with built-in revenue forecasting tools

Centralised Client List

- Maintain a centralised client database for Contacts, Leads, and Accounts
- Customise customer profiles using Entity and Layout Managers to match your processes
- Link meetings, tasks, calls, and emails directly to the relevant records for full visibility
- Quickly locate records using powerful search filters
- Import and export data easily to support seamless record migration
- Synchronise contacts with Google and Outlook using the optional

EspoCRM The Number One Open-Source CRM

Global Reach, World-Class Excellence



50,000 +
Companies
Using
EspoCRM



In 163
Countries
Of The
World

2014

10 Years
Since
First
Release



A Partnership Built On Trust

EspoCRM Wins
The Foss 20i
Awards 2025
In The CRM &
Support Category
For Solutions
That Make
Meaningful
Impacts On
Businesses



EspoCRM Wins
Software Suggest
Efficiency Award
2025 For
OutStanding
Performance &
Innovation





- Consistent data hosting boasting 99.97% uptime over the last decade.
- Seamlessly integrate with various platforms, offering unlimited API calls.
- Located in a Tier 3 UK Data Centre, boasting ISO certifications.
- Receive swift online & phone support.
- Written in PHP, JavaScript, and Python.
- LAMP Stack.
- Benefit from network redundancy ensuring maximum data availability, coupled with frequent backups (on-site every 4 hours, off-site daily).
- Trusted CRM hosting since 2006. enableCloud: Secure, high-performance cloud hosting tailored for CRM and business applications.
- EspoCRM: Optimised hosting and seamless integration for EspoCRM, ensuring peak performance and reliability.

Consulting (Architect Design)

We recognise that each organisation is unique. Our approach involves collaborating closely with our customers to identify their goals, map processes, and catalogue pain points. This thorough understanding allows us to determine the most suitable EspoCRM products and implementation strategies, ensuring a tailored solution that meets each organisation's specific needs and optimises their business processes for improved efficiency and success.

Configuration (Build)

Our accredited experts configure, launch, and customise EspoCRM to exact specifications. We adapt the platform to meet unique organisational needs, improve business processes, and overcome obstacles identified during the consulting phase. By ensuring a tailored solution, we optimise performance and provide a seamless, efficient, and effective CRM system that drives business success and enhances overall productivity.

Customisation (Core Code)

Our accredited experts create custom code to meet the unique requirements of your organisation. By adapting EspoCRM to align with your specific business processes and addressing any challenges identified during consultation, we ensure a bespoke solution that enhances efficiency and effectiveness. This custom coding guarantees that EspoCRM integrates seamlessly into your operations, optimising performance and driving business success.

Data Migration (Alignment)

Our specialists ensure a seamless transition of your data to EspoCRM using CloverETL. We meticulously plan and execute the migration process, leveraging CloverETL's powerful data alignment capabilities to maintain data integrity and minimise disruption to your operations. This ensures that all critical information is accurately transferred and readily accessible in the new system, providing a smooth and efficient migration experience that supports your business continuity and success.

Integration (Automation)

We core code and integrate solutions into EspoCRM using core code and APIs such as REST and SOAP. Additionally, we employ our enableFlow solution with ApacheAirflow and work with middleware tools like Workato, Talend, Make, and Zapier. This enables integration with nearly any existing on-premise or web-hosted application software, including accounting, CMS, ERP, and eCommerce systems, ensuring a comprehensive and flexible CRM solution tailored to your needs.

Training (Onboard)

We design training programs for EspoCRM around customer deployments, requirements, and tailored software systems. By focusing on role-specific needs and emphasising hands-on experience and user adoption, we ensure the most effective use of time. Our training helps users quickly become proficient with EspoCRM, maximising the system's benefits and supporting successful implementation and utilisation within the organisation.

Support (Success)

We provide an industry-leading Success program that supports your deployment of EspoCRM from before going live and for as long as customers wish to engage with the service. This includes full account management, with comprehensive guidance and support, ensuring that your organisation maximises the value and effectiveness of EspoCRM. Our dedicated team is there every step of the way to ensure your success and satisfaction with the platform.

Why enable.services?

Proven Approach

- Extensive experience delivering successful CRM and systems implementation projects
- Deep expertise in open-source technologies
- CRM specialists with an average of 5–20 years' hands-on industry experience across the team
- Established, repeatable best practices for EspoCRM implementations, refined through real-world delivery

Proven On-Time, On-Budget Implementation Methodology

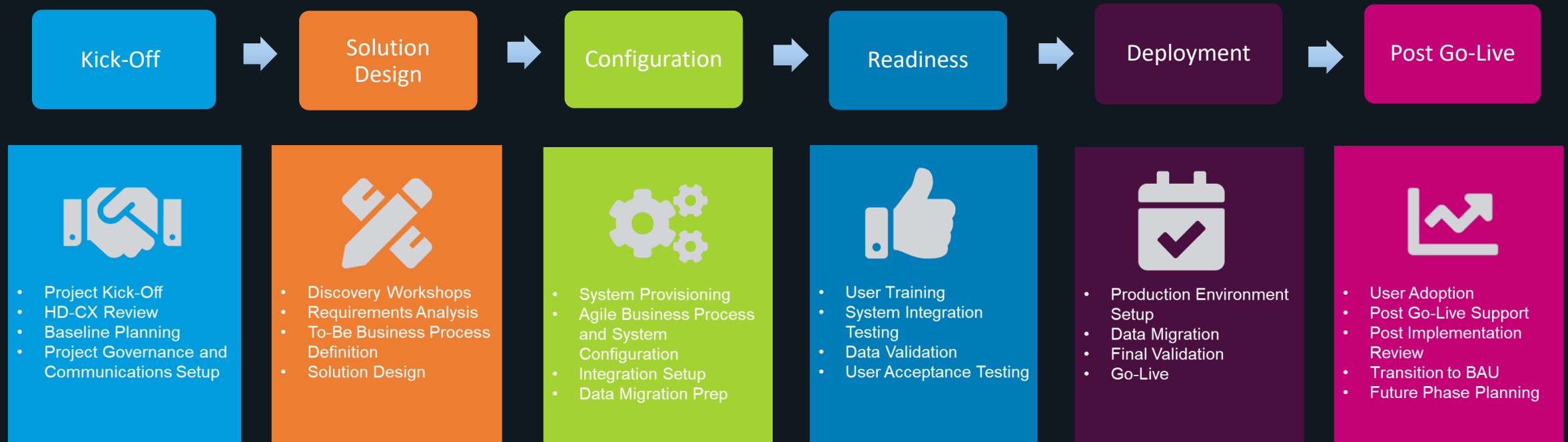
- Structured time-to-value delivery approach focused on rapid, measurable outcomes
- Dedicated project team support throughout every phase of the implementation lifecycle
- Ongoing support to accommodate evolving business requirements, including UK hosting and compliance needs

Well Connected

- enable.services' Projects Team works in close partnership with EspoCRM
- Ability to leverage internal EspoCRM teams, trusted partners, and specialist expertise to fast-track issue resolution
- Direct access to EspoCRM executive management, ensuring alignment, escalation, and long-term success

EspoCRM Implementation Mythology

- ✓ Consistent, repeatable methodology for end-to-end “HD-CX” project delivery
- ✓ Focused on client outcomes and user adoption
- ✓ Pre-defined activities, tools and templates for each step in the delivery cycle
- ✓ Rapid time-to-value (“let the platform do the work”)
- ✓ Defined project communication and governance model





UK 07:30 to 18:00 Monday to Friday



Before we can work out how quickly we need to respond to an issue, we first have to triage it and assign it a priority. Support operatives usually prioritise tickets based on the matrix below

Impact / Urgency	High Urgency	Medium Urgency	Low Urgency
High Impact	Priority 1 - Critical	Priority 2 - High	Priority 3 - Medium
Medium Impact	Priority 2 - High	Priority 3 - Medium	Priority 4 - Low
Low Impact	Priority 3 - Medium	Priority 4 - Low	Priority 4 - Low

Once a priority has been established for a ticket, we'll use the table below to work out the applicable time that will apply for the various stages of the ticket lifecycle.

Priority	Respond within*	Plan within*	Resolve within*
Priority 1 – Critical	2 hrs	4 hrs	8 hrs
Priority 2 – High	4 hrs	24 hrs	48 hrs
Priority 3 – Medium	8 hrs	50 hrs	70 hrs

EspoCRM with  **enable.services**

UK Hosted and Supported

