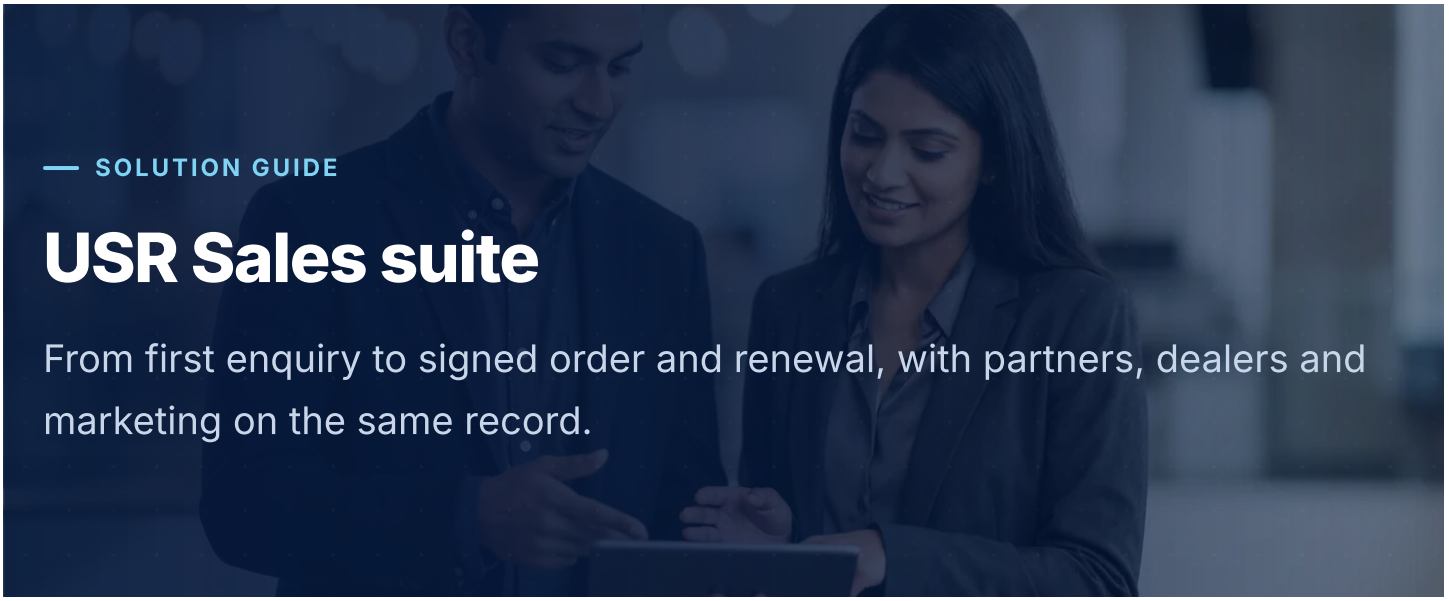


— SOLUTION GUIDE

USR Sales suite

From first enquiry to signed order and renewal, with partners, dealers and marketing on the same record.



USR SALES SUITE · SOLUTION GUIDE

One sign-in. One record. Every Sales app.

10 apps · 10 with full manuals · one sign-in with every other suite

10
apps in this suite

10
with full user manuals

1
sign-in for all USR apps

5
suites sharing one record

⬇ Download this guide (PDF)

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APPS IN THE SALES SUITE

What each app does

USR CRM Lite

Leads, deals and field sales

✓ **Step-by-step help**

USR Dealer Portal

Dealer orders, schemes and credit

✓ **Step-by-step help**

USR Demo Studio

Prospect demos, links and follow-ups

✓ **Step-by-step help**

USR Partner Portal

Deal registration, commission and partner customers

✓ **Step-by-step help**

USR Publish

AI blog, case studies and website widgets

✓ **Step-by-step help**

USR Quotes

Quote, e-sign and go live

✓ **Step-by-step help**

USR Referrals

Referrals, testimonials and reviews, with consent

✓ **Step-by-step help**

USR Sales Assistant

Briefs, drafts and next steps

✓ **Step-by-step help**

USR Customer Success

Customer health, renewals and expansion

✓ **Step-by-step help**

USR Webinars & Events

Registrations, reminders and follow-ups

✓ **Step-by-step help**

> Step-by-step help for every app, by role, is in the USR Help Centre. Your OKR Stars expert walks you through it at training.

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HOW THE DATA CONNECTS

One sign-in, one record, no re-typing

Your team signs in once to USR One. Every Sales app, and every app in the other suites, uses the same people, customer, vendor and item records.



Same sign-in, same record: each step happens without exports or re-typing.

DEPARTMENT AUTOMATION

What runs on its own

WHEN	**Web or event lead arrives**	→	Assigned to the right person by region and product
WHEN	**Quote not opened in 3 days**	→	A polite follow-up is scheduled for the owner
WHEN	**Deal won**	→	Onboarding tasks and the customer success plan start
WHEN	**Partner registers a deal**	→	Deal is protected and visible to the channel manager
WHEN	**Renewal due in 60 days**	→	Owner and customer success get a reminder

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WHERE AI HELPS

AI drafts. Your people decide.

✨ Next best action

Sales Assistant suggests who to call today and why

✨ Email and proposal drafts

First drafts from the deal notes, in your tone

✨ Meeting summaries

Notes and next steps written into the deal

✨ Win and loss patterns

Insights shows where deals stall

USR Assist works inside the apps your users already have. See how OKR Stars uses AI in every service.

QUICK START BY ROLE

Who does what in week one

Sales rep

Log calls, move deals, send quotes

Sales head

Review pipeline and forecast

Partner or dealer

Register deals and track orders

More role lists on User manuals.

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OFTEN ADDED NEXT

Grow from Sales to the whole company

💰 Finance suite →

Quotes become invoices and payments in Billing

🛟 Service suite →

Every customer gets a helpdesk and feedback loop

⚙️ Operations suite →

Orders check stock in Inventory

Solutions on usrinfo.tech: Lead to cash · Channel sales

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