KRIOLIS Multi-AI CRM System: Simple Employee User Manual

Welcome! This guide shows you how to use the **KRIOLIS Multi-AI CRM System** every day. You do not need to be good with computers. Just follow the steps. If something is unclear, ask your manager.

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1. What Is This System?

This is the place where we keep all our customer information in one spot. It helps the whole team work together.

With this system you can:

- **Keep customer information** — names, contacts, and everything about each customer in one safe place.
- **See what happened with each customer** — old notes, orders, and offers, so nothing gets lost.
- **Create tasks and reminders** — so you do not forget to call someone or send an offer.
- **Use AI to help you** — the AI can help you write text, make a short summary, and suggest your next step.

Think of it as the company's shared memory. Everything you write here, your colleagues can also see and use.

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2. How to Log In

1. Open your internet browser (for example Chrome or Edge).
2. Go to this address: **https://aicrm.kriolis.com**
3. In the first box, type your **email** or your **username**.
4. In the next box, type your **PIN** (a few numbers).
5. Press the **Prisijungti** (Log in) button.

You are now inside the system. Your login stays active for about **8 hours**. After that, you log in again.

Where does the PIN come from?

Your PIN is sent to you by **email** when you first register. It is a personal number. Keep it private.

Forgot or lost your PIN?

On the login page, under "Pamiršote PIN?", press **Atstatyti** (Reset). Type your company email and a **new PIN** comes to you by email. Your old PIN stops working. (Tip: check the "Šlamšto"/Spam folder if it does not arrive in a minute.)

How to register (first time only):

1. On the login page, press **Registruotis** (Register).
2. Type your **name**.

3. Type your **@kriolis.lt** (or **@kriolis.com**) email address.
4. Finish the form. Your **PIN will arrive by email**.
5. Use that PIN to log in.

Note: When you are new, your account is **view-only**. You can look at everything, but you cannot change or approve things yet. An administrator (Aleksandras) will give you more rights when needed.

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3. What You See on the Main Screen

After you log in, you see a menu. Here are the main parts you will use most:

- **Klientai (Customers)** — the list of all our customers. Open one to see everything about them.
- **Uzsakymai (Orders)** — our orders and what stage each one is at (from first inquiry all the way to shipped).
- **Kalendorius (Calendar)** — your own tasks and reminders, plus important dates from orders and offers.
- **KP (Komerciniai pasiulymai / Commercial offers)** — price offers we send to customers as a PDF.
- **Samatos (Cost estimates)** — our inside cost and price calculations (used by sales/managers).
- **Dokumentai (Documents)** — a tool to create documents.
- **Agentai (AI Agents)** — this is the **AI Assistant** area. It shows live numbers and the buttons where a human approves order steps.
- **Reports / Dashboard** — numbers at a glance, such as how much money customers still owe us.
- **Notifications** (the bell icon) — small messages telling you what is new or what needs your attention.

You will not use every menu every day. Start with **Klientai (Customers)** and **Kalendorius (Calendar)**.

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4. How to Add a New Customer

1. In the menu, click **Klientai (Customers)**.
2. Click the **+** button (Add new / Pridėti).
3. Type the customer details: company name, contact person, email, and phone.
4. Check that you typed everything correctly.
5. Click **Save** (Išsaugoti).

The new customer is now in the list. Everyone on the team can see it.

Tip: If you are new and view-only, you may not be able to add a customer yet. If the **+** button does nothing, ask an administrator to upgrade your account.

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5. How to Find a Customer

1. In the menu, click **Klientai (Customers)**.

2. Find the **search box** at the top of the list.
3. Type part of the name — for example the company name or the person's name.
4. The list gets shorter and shows the matches.
5. Click the customer you want to open their record.

If you do not find them, try a shorter word, or check the spelling.

6. How to Add a Note

A note is a short message about what happened with a customer. Good notes help the whole team.

1. Open the customer in **Klientai (Customers)**.
2. Find the notes area.
3. Type a **short, clear, factual** note.
4. Click **Save** (Išsaugoti).

Keep notes short. Write only facts (what happened, when, what was agreed). Do not write feelings or guesses.

Good example:

> 2026-06-01. Called Mr. Petersson. He wants a quote for 12 cabin tables. Needs price in SEK by Friday.

Bad example:

> Talked to the guy, I think maybe he wants something, will see later.

The good note has a date, a name, and a clear next step. The bad note is vague and not useful to anyone.

7. How to Create a Task or Reminder

A task helps you remember to do something on time.

1. In the menu, click **Kalendorius (Calendar)**.
2. Click the **+** button (Add task / Naujas).
3. Type a short title for the task.
4. Choose the **date** (and time if needed).
5. Click **Save** (Išsaugoti).

When the date comes, you will see the reminder.

Examples of good tasks:

- Call customer tomorrow
- Send offer (KP) to customer

- Check if payment has arrived
- Ask manager for approval

Keep the title short and clear, so you know exactly what to do.

8. How to Upload a Document

1. Open the place where the document belongs — for example the **customer** in **Klientai (Customers)**, or the **Dokumentai (Documents)** area.
2. Click the **Upload** button (Įkelti) or the paperclip icon.
3. Choose the file from your computer.
4. Wait for it to finish loading.
5. Check that the file name is correct.

The document is now saved in the system and your colleagues can see it.

Tip: Give your files clear names before you upload, for example Petersson_offer_2026-06.pdf.

9. How to Use the AI Assistant

The AI Assistant lives in the **Agentai (AI Agents)** area. It is a helper that can save you time.

What the AI can help with:

- Writing a short, polite email or text.
- Making a **summary** of a long customer history in simple words.
- Suggesting **what to do next** with a customer.
- Explaining an order in simple words.

What you should NOT trust blindly:

- **Prices** — always check the real price yourself.
- **Dates** — make sure the deadline is correct.
- **Names** — check the company name and the person's name are spelled right.

Very important rule: The AI is only a **helper that gives advice**. It can **never** approve an order step or send anything to a customer by itself. **A human must always approve.** You **must check important information yourself before anything goes to a customer.** If you are not sure, ask your manager.

Here are 5 ready prompts. You can copy one and paste it into the AI Assistant:

> Summarize this customer history in simple words.

> Draft a short, polite email to the customer about their order status.

> What should I do next with this customer?

> List the open tasks for this customer.

> Explain this order in simple words.

After the AI gives you an answer, **read it carefully** and fix anything that is wrong before you use it.

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10. Simple Safety Rules

Please follow these simple rules every day:

1. **Never share your PIN** with anyone. It is yours alone.
2. **Log out** when you use a shared or public computer. (Click your name, then **Atsijungti** / Log out.)
3. **The AI is a helper, not the boss.** It only gives advice. A person must always approve.
4. **Always double-check prices, dates, and names** before you send anything to a customer.
5. **If you are unsure, ask your manager.** It is always better to ask than to guess.

Thank you for keeping our customer information safe and tidy.