

REBEL SOFTWARE · RebelPSA

CRM Technician User Guide

A guide to the Contacts and Companies modules in RebelPSA's CRM, for technicians and service delivery staff.

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1. About This Guide

This guide explains how to use the Customer Relationship Management (CRM) area of RebelPSA — the Contacts and Companies modules — from a technician's day-to-day use. It covers how to find customer and contact records, how to read the information on a customer's account, and how the CRM connects to the tickets you work every day in the Help Desk.

RebelPSA's CRM is built to give you, at a glance, everything you need to know about a customer before you pick up the phone or open a ticket: who the decision makers are, how healthy the account is, what their support history looks like, and whether there's anything urgent — an expiring agreement, a low satisfaction score, an overdue review — that needs attention.

Tip. *If you're looking for how to work a support ticket day-to-day, see the companion document, the Help Desk Technician User Guide. This guide focuses on customer and contact records.*

2. Getting Around the CRM

The CRM lives in two connected modules, accessible from the main left-hand navigation:

- **Contacts** — the people you talk to: end users, decision makers, billing contacts, and technical contacts at each customer.
- **Companies** — the customer organizations themselves, including their sites and locations, agreements, health, and history.

Both modules share the same navigation patterns, so once you're comfortable in one, the other will feel familiar:

- **Single-click a row** to open the Quick-Preview panel on the right side of the screen — a fast summary without leaving the list.
- **Click the name link** (the contact's name or company name) to open the full Detail page.
- **Right-click a row** for a context menu with shortcuts (Quick Edit, Open in New Tab, Copy Email, Copy Phone, Add Note, Create Ticket).
- **Scroll to load more** — lists use infinite scroll, so you're never limited to a fixed page size when searching a large customer base.
- **Universal search bar** at the top of each list searches across name, email, phone, and company at the same time.

Tip. *Both list pages support Compact, Standard, and Comfortable row density — use the density toggle if you want to see more rows on screen at once.*

3. The Contacts Module

The Contacts list shows every person associated with every customer you support. Use it when you need to find a specific person, or when you want to see everyone at a given company.

Contact List — Columns & Layout

Columns can be shown, hidden, reordered by drag-and-drop, and resized using the column chooser. The Name column stays frozen on the left as you scroll horizontally. The table below describes the most useful columns:

Column	What It Shows
Name	Contact's full name. Click to open the Quick-Preview panel; click the name link to open the full record.
Title / Role	Job title, e.g. Office Manager, IT Director.
Email	Primary email address with a Work / Personal / Other badge. Click to copy.
Phone / Mobile	Click-to-call link. Country flag prefix on international numbers.
Company	The customer organization this contact belongs to. Click to preview the company.
Site / Location	Which customer site or location this contact is tied to.
Owner	The account manager or technician assigned to this contact.
Last Activity	Date, time-ago, and who performed the most recent action.
Open Tickets	Live count of this contact's open tickets — click to jump to a filtered ticket list.
Last Ticket Status	Status chip of the contact's most recent ticket.
Lifecycle Stage	Where this contact sits in the customer journey: Prospect, Onboarding, Active, At Risk, or Former.
Tags	Color-coded labels (e.g. VIP, Decision Maker) — you can filter by more than one at a time.
Portal Access	Whether this contact has a Customer Portal login.
MFA / Verified	Whether this contact has multi-factor authentication enabled — useful for security-conscious support decisions.

Tip. Right-click any column header to open the column chooser, or drag a column header to reorder it. Your layout is remembered for your own login.

Searching & Filtering Contacts

Above the grid you'll find quick-filter chips for the most common needs: Company, Site, Owner, Lifecycle Stage, Tags, Has Portal Access, and date ranges. Click a chip to apply it instantly.

For anything more specific, open the Advanced Filter panel, which supports AND/OR logic and nested conditions across any field — including fields on the contact's parent company (for example, “Company Health Score below 60” or “Company Agreement expires within 60 days”).

Useful activity-based filters you can build:

- No ticket in the last 60 or 90 days
- No email sent this quarter
- SLA breach in the last 7 days
- Portal not logged in for over 30 days

There are also pre-built engagement tabs: Highly Engaged, Slipping (score below 30), and Unengaged 90 Days+ — handy for proactive check-ins.

Saved Views

A Saved View is a named combination of filters, columns, and sort order that you (or your team) can return to with one click. Saved Views appear as pinned tabs above the grid and can be Private (just for you), Team, or Public (organization-wide). Drag tabs to reorder them. If a view is active and you change a filter or column, a dot indicator shows the view is “unsaved” until you save or discard the change.

Bulk Actions on Contacts

Select one or more rows using the checkboxes — or “Select all matching filter” to act on every record that matches your current filter, even across many pages — to reveal the bulk action toolbar:

Action	What It Does
Assign Owner	Reassign the account manager or technician for all selected contacts.
Bulk Edit	Edit any field across all selected contacts from a single panel.
Add / Remove Tag	Apply or remove tags in bulk.
Send Bulk Email / SMS	Send a templated message to everyone selected, with merge fields and opt-out enforcement.
Schedule Activity	Create a task, call, or meeting for each selected contact.

Action	What It Does
Merge Duplicates	Launch the merge wizard to combine 2–5 duplicate records (see Section 9).
Enrich	Pull updated name, title, department, and phone from Microsoft 365 / Azure AD.
Export	Download the selection or full filtered list as a CSV, Excel, or JSON file.
Change Lifecycle Stage	Move all selected contacts to a new lifecycle stage at once.
Portal Invite	Send a Customer Portal activation email to all selected contacts.
Delete	Soft-delete with a confirmation count — recoverable by an administrator.

Important. Bulk actions affect every record currently selected — double-check your selection count in the toolbar before confirming an edit, delete, or email send.

The Quick-Preview Panel

Single-clicking a contact opens a slide-out panel from the right without leaving the list. It gives you an at-a-glance summary:

- Identity card — name, title, company, avatar or initials
- Contact info — email, phone, mobile, preferred communication channel
- Lifecycle stage, engagement score, and health status
- Last 5 tickets with status chips, age, and SLA progress bar
- Open ticket count broken out by severity
- Recent activity (last 3 items)
- Tags, Portal, and MFA status
- Quick action buttons: Send Email, Log Call, Create Ticket, Add Note, Edit

Tip. The Quick-Preview panel is the fastest way to get oriented on a contact before you call them or start a ticket — you usually don't need to open the full record.

The Contact Detail Page

Click a contact's name to open the full record. The detail page is organized into cards:

- **Header** — name, title, avatar, lifecycle chip, health indicator, tags, and a Quick Actions toolbar.
- **Identity & Verification** — MFA status, authenticator linkage, last password reset, and portal access flag. Useful when confirming a caller's identity or troubleshooting a login issue.

- **Health Score sparkline** — a 6-month trend line; hover for a breakdown of what's driving the score up or down.
- **Activity Timeline** — every email, call, ticket, meeting, note, portal login, and password reset in one unified feed. You can pin the most important entries to the top.
- **Last 5 Tickets & open count by severity** — a fast read on how much support load this person is generating.
- **Portal usage stats** — last login date, sessions in the last 30 days, and knowledge base articles viewed.
- **Communication preferences** — preferred channel, preferred hours, language, and do-not-contact flag — check this before reaching out.
- **Org chart** — a compact “Reports To” visualization so you can see where this person sits in their organization.
- **Associated Companies** — if a contact spans more than one customer, each relationship is labeled (Decision Maker, End User, Billing Contact, etc.).
- **Documents** — signed agreements, onboarding forms, and training certificates attached to this person.
- **Survey history** — recent NPS, CSAT, and ticket survey results for this contact.
- **Audit log** — a record of recent edits, showing who changed what and when.

4. The Companies Module

The Companies list is where you manage customer organizations — their sites, agreements, health, revenue, and support history. Think of a Company record as the master file for a customer account.

Company List — Columns & Layout

Column	What It Shows
Company Name	Clickable; shows a logo or initials avatar. Stays frozen as the first column while scrolling.
Status	Active, Inactive, Lead, Prospect, Vendor, Partner, or Former.
Account Manager / CSM	The account manager and, separately, the Customer Success Manager assigned to this account.
Site Count / Contact Count	Number of locations and people on file — click either to drill into the filtered list.
Open Tickets	Live open-ticket count; click to jump to the filtered ticket list.

Column	What It Shows
SLA Breaches (30d)	Count of SLA breaches in the last 30 days — shown in red if greater than zero.
Active Agreements	Agreement type with a days-to-renewal countdown.
MRR / ARR	Monthly and annual recurring revenue, with a trend arrow.
Health Score	Traffic-light indicator plus a numeric score (0–100) and trend arrow — see Section 5.
Lifecycle Stage	Prospect -> Onboarding -> Active -> At Risk -> Renewing -> Former.
NPS / CSAT	Rolling averages of the customer's satisfaction scores, color-coded.
Last QBR Date	Date of the most recent Quarterly Business Review.
Tags	Color-coded labels; you can filter by more than one at a time.

Searching & Filtering Companies

Quick-filter chips cover the essentials: Active, Owner/CSM, Type, Industry, Territory, Open Tickets > 0, Agreement Expiring < 60 Days, Health Below a Threshold, Tag, and Has Portal.

The Advanced Filter panel supports the same AND/OR nested logic as Contacts, plus relational filters against Tickets, Agreements, and Contacts. A hierarchical filter lets you say “Under Parent Account X” to see an entire corporate family at once.

Pre-built smart filters relevant to managed service providers include:

- Customers with a renewal due in under 60 days and health below 70
- Customers acquired this quarter with no ticket activity yet
- Customers with an outstanding invoice over 30 days
- No QBR completed in the last 180 days

Bulk Actions on Companies

Action	What It Does
Assign Account Manager / CSM	Reassign ownership across all selected companies.
Bulk Edit / Mass Update Custom Field	Edit any field, including custom fields, across the selection.
Add / Remove Tag	Apply or remove tags in bulk.

Action	What It Does
Mass Email Primary Contacts	Send a templated email to the primary contact at each selected company.
Merge Duplicate Companies	Combine 2–5 duplicate company records (see Section 9).
Schedule QBR	Create Quarterly Business Review activities for all selected companies at once, with the option to spread the scheduling across several days.
Toggle On Hold / Out of Business	Mark accounts as inactive with a reason and date stamp.
Export / Print Mailing Labels	Download data or print physical labels for the selection.
Push to RMM	Sync selected companies as managed organizations to your remote monitoring and management (RMM) integration.

Company Hierarchy & Map Views

Use the Hierarchy View toggle to switch from a flat table to a visual tree showing parent/child company relationships — useful for franchises, multi-location businesses, or holding companies. You can zoom, pan, expand or collapse branches, and edit a company directly from its tile.

Map View plots every customer site on a geographic map — handy for planning field visits or understanding regional coverage. A Board/Kanban view groups companies by Status or Lifecycle Stage for a workload-style layout.

The Quick-Preview Panel

Single-clicking a company opens the same style of slide-out panel as Contacts, with a company-specific set of cards:

- Summary card — name, logo, health traffic-light, MRR/ARR, open ticket count, primary contact, account manager
- Active agreement card with days-to-renewal
- Last 5 tickets with status, age, and SLA progress
- Recent activity, sites mini-list, health factor breakdown, NPS/CSAT mini-scores
- Quick actions: Create Ticket, Log Note, Schedule QBR, Send Email

The Company Detail Page

The Company Detail page is the single best place to understand a customer account before a call, ticket, or review. Key cards include:

- **Health Score panel** — a 6-month sparkline and a rule-by-rule breakdown (open tickets, SLA breach rate, MFA adoption, backup health, payment status, NPS, last QBR) — see Section 5.
- **Account Brief** — a short AI-generated summary of the account's current state, refreshed daily. Note: this card shows a placeholder message until AI summaries are enabled for your account.
- **Active Agreement card** — type, value, start/end dates, renewal countdown, and auto-renewal flag.
- **Open Tickets list** — status, SLA bar, assignee, and age, with one-click drill into the filtered ticket list.
- **MRR/ARR trend chart** — 12-month revenue history.
- **Configuration Items / Assets** — device counts by category (servers, workstations, mobile, network) with health badges, where a remote monitoring and management (RMM) integration is connected.
- **Sites / Locations sub-grid** — each site's primary contact, address, and device count.
- **People / Contacts sub-grid** — role badges, decision-maker flags, MFA status, and last activity for everyone at the account.
- **Org chart** — a compact visual tree of contacts and their reporting relationships.
- **Activity Timeline** — the unified feed of everything that has happened on this account (see Section 6).
- **Renewal Pipeline** — upcoming agreement renewals and expansion opportunities.
- **Last QBR notes** — a pinned summary of the most recent Quarterly Business Review, plus a countdown to the next one.
- **Customer Documents** — signed agreements, business continuity plans, network diagrams, and runbooks.
- **Billing Snapshot** — outstanding invoices, average days-to-pay, and a 12-month revenue chart.
- **Account Team panel** — Account Manager, CSM, Lead Engineer, and Billing Owner, each with a role badge.
- **Integration Links** — direct links into connected tools such as Microsoft 365 Admin, Azure AD, and your RMM platform, scoped to this customer.
- **Custom Cards** — your organization can add extra cards per team, such as an Onboarding Checklist, Compliance Status, License Audit, or Patch Compliance.
- **Audit Log** — recent field-level edits with who made the change and when.

5. Tags, Lifecycle Stage & Health Score

Tags

Tags are free-form, color-coded labels you can attach to any contact or company — for example VIP, At Risk, or Strategic. Tags are shared across the platform, so the same tag set works consistently across Contacts, Companies, and Tickets. Add or remove tags inline from the list, the Quick-Preview panel, or the Detail page.

Lifecycle Stage

Lifecycle Stage tracks where a customer or contact sits in their relationship with your company:

- Companies: Prospect -> Onboarding -> Active -> At Risk -> Renewing -> Former
- Contacts: Prospect -> Onboarding -> Active -> At Risk -> Former

Use the Board/Kanban view on either list to drag and drop records between stages, or update the stage inline from the grid.

Health Score

Every company gets a computed Health Score from 0–100, shown as a traffic-light badge (Healthy / Warning / At Risk / Critical) plus the numeric score. Health Score is calculated automatically from several weighted factors and recalculates whenever something relevant changes — a ticket closes, an NPS response comes in, an agreement updates, a payment posts:

Factor	Default Weight
Open ticket count	15%
SLA breach rate (30 days)	20%
MFA adoption %	10%
Backup health status	10%
Payment status	15%
NPS rolling average	15%
Last QBR date	10%
CSAT rolling average	5%

Default status thresholds are Healthy ≥ 80 , Warning 60–79, At Risk 40–59, and Critical below 40 — though your organization can configure these differently. When an account's status drops to At Risk or Critical, an alert banner appears on the Company record. Hover the score badge anywhere in the app to see the factor-by-factor breakdown driving the number.

Tip. *If a customer's Health Score suddenly drops, check the factor breakdown first — it often points straight at the cause (a run of SLA breaches, a missed QBR, an overdue invoice) and gives you a natural talking point for your next call.*

6. The Activity Timeline

The Activity Timeline is a single, unified history that appears on both Contact and Company detail pages. It automatically captures emails, calls, tickets, meetings, notes, portal logins, password resets, agreement events, invoice events, and completed reviews — so you never have to piece together a customer's story from multiple screens.

- Pin important entries to keep them visible at the top of the timeline.
- Add a manual note directly from the timeline, the Quick-Preview panel, or the Detail page toolbar.
- Filter the timeline by activity type when you only want to see, for example, tickets or emails.

7. Customer Feedback: NPS, CSAT & Ticket Surveys

RebelPSA automatically gathers structured customer feedback and feeds it back into the account record and Health Score. As a technician, here's what you need to know about each:

NPS (Net Promoter Score)

A periodic relationship-level survey (0–10 scale) sent to contacts, categorized as Promoter (9–10), Passive (7–8), or Detractor (0–6). Detractor responses trigger an alert to the account manager. NPS trend and any written comments appear on the Company Detail page.

CSAT (Customer Satisfaction)

Sent automatically after a ticket is closed (1–5 star scale). CSAT feeds a rolling average on both the Company and the individual technician. A response of 2 stars or lower triggers an alert to the technician and their supervisor — if you receive one of these alerts, it's worth a quick follow-up with the customer.

Ticket Surveys

A more detailed, configurable survey template sent after a ticket is resolved or closed. Results roll up by company, by technician, by category, and by queue, and appear on the ticket itself and on the Company Detail page.

Tip. Your own CSAT and Ticket Survey averages may appear on a technician leaderboard on the Help Desk dashboard — a quick way to see how your customer feedback compares over time.

8. Strategic Reviews: QBR & Yearly Strategic Review

Quarterly Business Reviews (QBR)

A QBR is a scheduled check-in with a customer, typically covering ticket volume, SLA performance, agreement status, and satisfaction trends. RebelPSA automatically drafts an agenda from the account's live data (Health Score factors, open action items, renewal status, NPS/CSAT trend, ticket volume), so

the account manager isn't starting from a blank page.

- QBRs appear on the Company Detail page and on a dedicated QBR calendar.
- Each QBR has a rich-text agenda, notes, attendee list, action items, and supporting documents.
- Action items created during a QBR appear in the Activity Timeline and get their own due-date reminders.
- A QBR can be flagged as a compliance check for accounts where a compliance framework (such as SOC 2, HIPAA, PCI DSS, NIST CSF, or CIS Controls) applies.
- Completed QBRs can be exported as a branded PDF to share with the customer.

Yearly Strategic Reviews (YSR)

An annual, higher-level review that auto-populates a “Year in Review” from the account's ticket volume, SLA performance, satisfaction trend, agreement value, and delivered projects, plus a Goals & Roadmap section and a dedicated Compliance Status section (security posture, patch compliance, MFA adoption, and outstanding compliance items). Like QBRs, YSRs can be exported as a branded PDF, and customers with Customer Portal access can be given a read-only view.

9. Finding & Merging Duplicate Records

When the same person or company ends up with two records — a common result of imports, manual entry, or ticket-created contacts — use Merge Duplicates rather than deleting one copy outright. Merging preserves history and re-points every related ticket, note, and agreement to the surviving record.

- Select 2–5 duplicate records from the list (or open the Duplicate Review panel, if your tenant has automatic duplicate detection enabled).
- Choose the merge action to open the review panel.
- Compare the records side-by-side, field by field; conflicting values are highlighted.
- Choose which record is the “master” and select which field values to keep.
- Confirm the merge. This is not reversible, so review carefully before confirming.

After a merge, every ticket, note, agreement, and activity entry that referenced the removed record is automatically re-pointed to the surviving record, and the merge itself is written to the audit log.

Important. *Merging is permanent. Always double-check which record you're keeping as the master, especially when the two records have different owners, tags, or open tickets.*

10. Portal Access & MFA Status

Every contact record shows whether that person has Customer Portal access and whether they have multi-factor authentication (MFA) verified. These indicators are useful when:

- Confirming a caller's identity before discussing sensitive account details
- Troubleshooting a customer's portal login issue
- Sending a Customer Portal invitation to a contact who doesn't have one yet — available as a single action from the Detail page, or as a bulk action from the list

MFA adoption also rolls up to the company level and is one of the factors feeding that account's Health Score.

11. Common Technician Workflows

Before calling a customer back

- Search for the contact or company using the universal search bar.
- Single-click to open the Quick-Preview panel and scan the health, open tickets, and recent activity.
- If anything looks off — a low health score, a recent Detractor NPS response, an overdue agreement — open the full Detail page for the details before you call.

Logging a call or note after a customer interaction

- Open the contact or company's Quick-Preview panel or Detail page.
- Use the Log Call or Add Note quick action.
- Your entry appears immediately in the Activity Timeline, visible to the whole team.

Creating a ticket directly from a CRM record

- From the Quick-Preview panel or Detail page, use the Create Ticket quick action.
- The new ticket is automatically linked to the contact and company, and appears in their Activity Timeline and Last 5 Tickets card going forward.

Spotting at-risk accounts proactively

- On the Companies list, apply the Health Red / Renewal Due < 60d smart filter, or sort by Health Score ascending.
- Open each flagged account's Health Score factor breakdown to see what's driving the score down.
- Escalate to the account's CSM or Account Manager, or log the outreach yourself if that's your role.

12. Quick Reference & Glossary

Term	Meaning
Health Score	A computed 0–100 score reflecting overall account wellness, based on tickets, SLA performance, payment status, satisfaction, and more.

Term	Meaning
Lifecycle Stage	Where a contact or company sits in the customer journey (e.g. Active, At Risk, Renewing).
NPS	Net Promoter Score — a 0–10 relationship survey measuring likelihood to recommend.
CSAT	Customer Satisfaction Score — a 1–5 survey sent after ticket closure.
QBR	Quarterly Business Review — a scheduled account check-in.
YSR	Yearly Strategic Review — an annual, higher-level account review.
Saved View	A named combination of filters, columns, and sort order you can return to instantly.
Quick-Preview Panel	The slide-out summary panel opened by single-clicking a list row.
Tag	A free-form, color-coded label attached to a contact or company.
Account Team	The set of people assigned to a company: Account Manager, CSM, Lead Engineer, Billing Owner.
Merge	Combining two duplicate records into one, preserving history on the surviving record.