

GETTING STARTED

DASHBOARD

Our CRM dashboard provides an at-a-glance view of relevant and actionable sales data:

- **Sales Performance** - here you can view select sales KPIs to measure how effective your sales team members are at hitting their goals.
- **Activities Summary** - this is customisable, both in the activity descriptions and the time period. Here you can track personal progress towards set activity goals.
- **Pipeline Summary** - this is a snapshot view of where all prospects are in a sales process.

[Sales Performance](#)

[Activities Summary](#)

[Pipeline Summary](#)

The **Search** bar in the Dashboard can be used to 'quick find' a specific contact or customer.

[Search](#)

The **Add** button can be used to 'quick add':

- i. a **Customer**
- ii. a **Contact** or
- iii. an **Activity**

[Add / Edit a Customer](#)

[Add / Edit a Contact](#)



[Add a New Activity](#)

GS35