GETTING STARTED

SETTINGS

The CRM Settings icon contains device-related options that allow you to customize your application to fit your company or (company approved) personal preferences.

You can select check boxes to adjust the Dashboard presentation:

Options

Dashboard Settings Options

You can adjust your personal CRM settings:

Settings

Rental Fees

Quote Products

Utilities

My Email Settings

My Account Settings

My Sync / Calendar Sync Settings

You can adjust your general Salesmen settings:

Salesmen Settings

Salesmen

Administrators

Email Settings

[Salesman Assignments]

[Salesmen Monthly Targets]

[Salesmen Commercials]

The Customer Groups setting allows you to link multiple salesman to multiple customers. Linking a particular salesman to a group gives them access to all customers in that group:

Customer Groups

Create or Edit Groups

Merge Customer Groups

Merge Duplicate Groups

Rank is based on how much you value a customer and helps to define the call cycle per client. You can add or edit a rank here:

Customer Ranks

Customer Ranks

Case Configuration enables you to set pre-defined steps (gates) that need to be completed for a case to progress to the next stage:

Case Configuration

Case Configuration / Stage Gates

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