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](#)

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