

CRM BASICS

DASHBOARD SETTINGS OPTIONS

CRM is designed with the Salesman in mind. All information viewed is specific to the user that is logged in. This user, sees only his/her Customers, Cases, Activities, Pipeline, etc. and can plan accordingly.

SETTINGS OPTIONS OVERVIEW

You can open the Settings frame to access 4 different settings Options:

Show items for subordinates

- If you are a Sales Manager, you can view your team's information by selecting **Show items for subordinates** in the Dashboard (Home page). Your team is defined by the **employee hierarchy / Organisational Chart** in BPO2. Each employee within the sales team needs to have their sales manager set up as **Manager** when **adding or editing an employee**.

Exclude deleted customers in search on Cold Call screen

- Selecting this option means that only **Active** customers will display in the selection lists when you are doing a search for a customer or contact.

Hide dashboard panel

- Selecting this option will hide the Dashboard panel in both the Home page and the Customer Home page, giving more space to view other details in both of those pages.

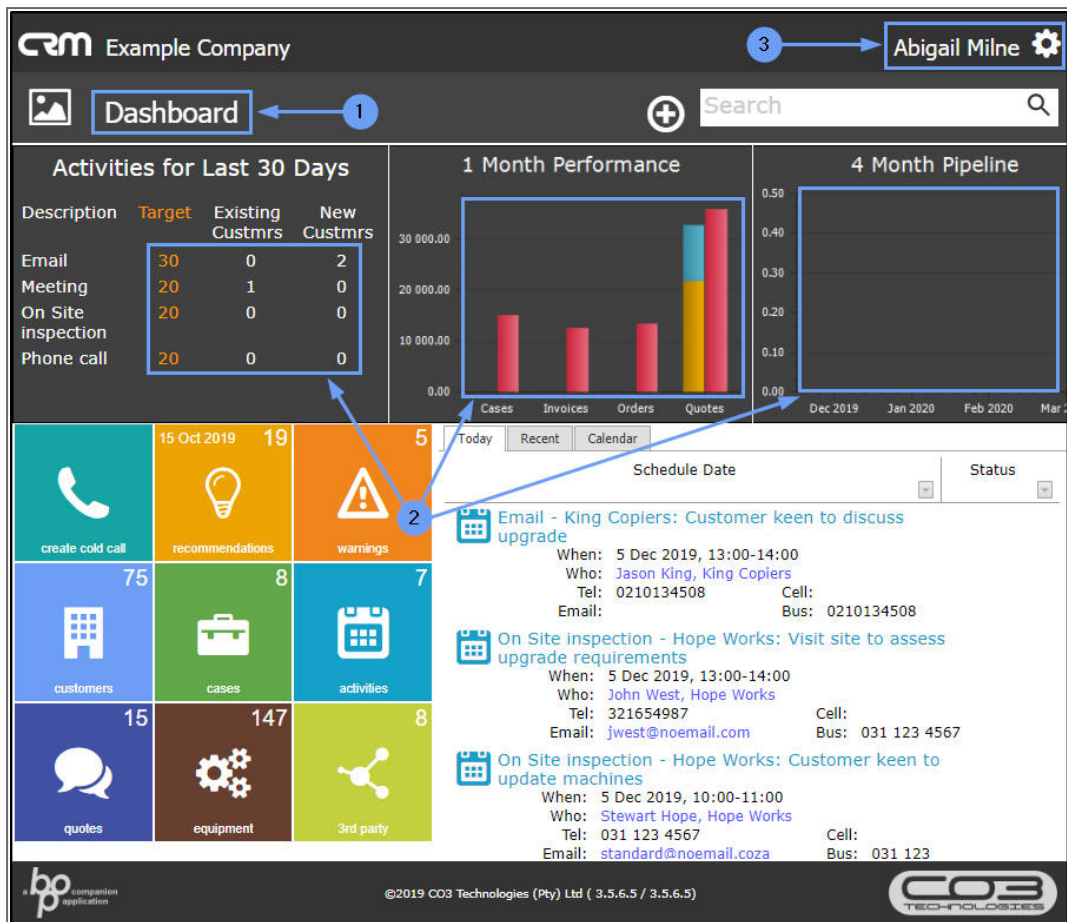
Hide dashboard panel on customer page

- Selecting this option will only hide the Dashboard panel in the Customer Home page, giving more space to view other details in this page.

Ribbon Access: Webpage > `http://[servername]:[port-no]/BPOCRM/User.aspx`

SHOW ITEMS FOR SUBORDINATES

1. In the **Home** page (Dashboard),
2. Note the figures in the **Activities for Last 30 Days** frame and the bar graph amounts in the **1 Month Performance** frame and the **4 Month Pipeline** frame.
3. **Hover over** or click on the **User Name** or **Settings** icon



The screenshot shows the CO3 CRM dashboard for 'Example Company'. The user 'Abigail Milne' is logged in. The dashboard includes a 'Dashboard' tab, a search bar, and several widgets. A table titled 'Activities for Last 30 Days' is highlighted with a blue box and labeled '1'. A bar chart titled '1 Month Performance' is highlighted with a blue box and labeled '2'. A calendar view titled '4 Month Pipeline' is highlighted with a blue box and labeled '3'.

Description	Target	Existing Custmrs	New Custmrs
Email	30	0	2
Meeting	20	1	0
On Site inspection	20	0	0
Phone call	20	0	0

1 Month Performance:

Category	Value
Cases	15000.00
Invoices	12000.00
Orders	13000.00
Quotes	25000.00

4 Month Pipeline:

Month	Value
Dec 2019	0.40
Jan 2020	0.30
Feb 2020	0.20
Mar 2020	0.10

Activities for Last 30 Days:

Activity	Count
create cold call	19
recommendations	5
warnings	75
customers	8
cases	7
activities	15
quotes	147
equipment	8
3rd party	

Calendar View:

Activity	When	Who	Tel	Cell	Bus
Email - King Copiers: Customer keen to discuss upgrade	5 Dec 2019, 13:00-14:00	Jason King, King Copiers	0210134508	0210134508	
On Site inspection - Hope Works: Visit site to assess upgrade requirements	5 Dec 2019, 13:00-14:00	John West, Hope Works	321654987	031 123 4567	
On Site inspection - Hope Works: Customer keen to update machines	5 Dec 2019, 10:00-11:00	Stewart Hope, Hope Works	031 123 4567	031 123	

1. The **Settings** frame will expand and the
2. **Options** list will be displayed.
3. Select the **Show items for subordinates** check box.



The screenshot shows the CO3 CRM dashboard for 'Example Company' with user 'Abigail Milne'. The dashboard includes a 'Dashboard' section with a table of activities for the last 30 days, a 'Settings' menu, and a 'Calendar' view. The 'Settings' menu is highlighted, showing options for 'Show items for subordinates', 'Exclude deleted customers in search on Cold Call screen', 'Hide dashboard panel', and 'Hide dashboard panel on customer page'. The 'Calendar' view shows a list of activities with details such as 'On Site inspection - Hope Works: Visit site to assess upgrade requirements'.

Description	Target	Existing Custmrs
Email	30	0
Meeting	20	1
On Site inspection	20	0
Phone call	20	0

Activity	Count
create cold call	19
recommendations	5
warnings	75
customers	8
cases	7
activities	15
quotes	147
equipment	8
3rd party	

Options

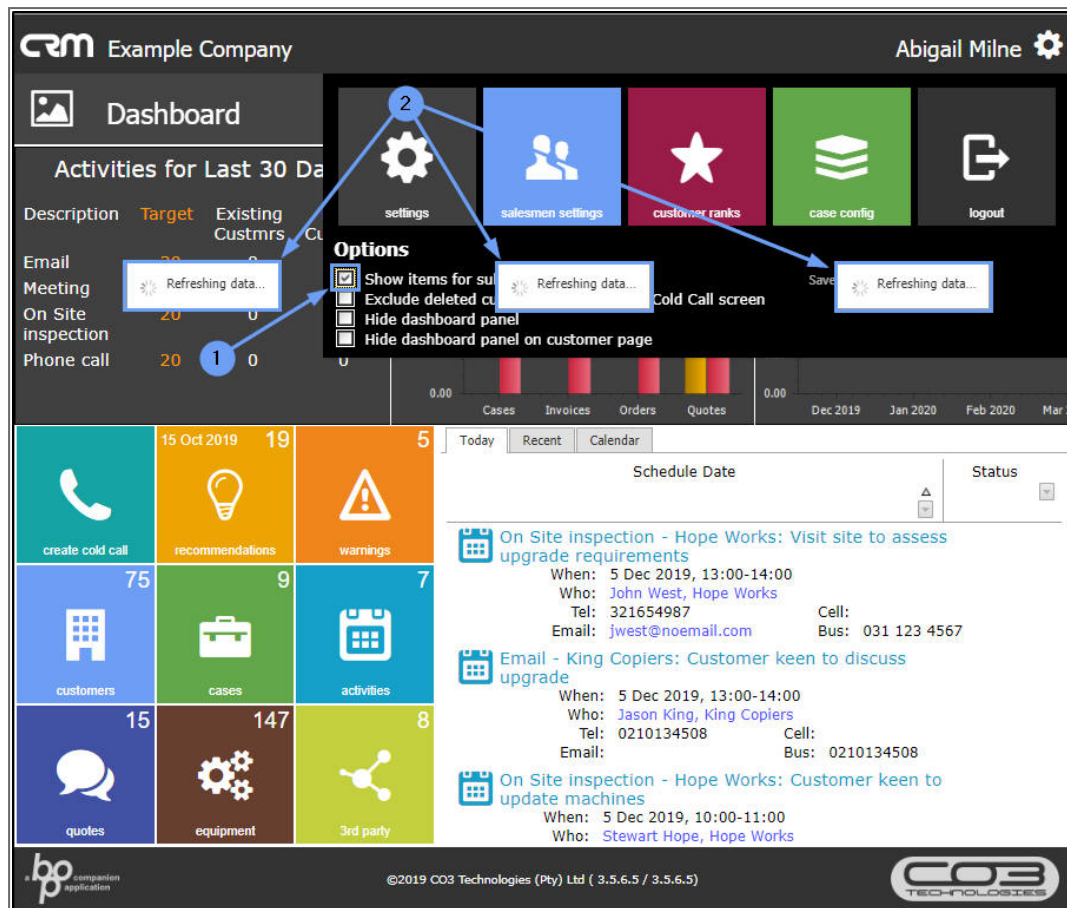
- ☐ Show items for subordinates
- ☐ Exclude deleted customers in search on Cold Call screen
- ☐ Hide dashboard panel
- ☐ Hide dashboard panel on customer page

Calendar

Schedule Date	Status
On Site inspection - Hope Works: Visit site to assess upgrade requirements	
When: 5 Dec 2019, 13:00-14:00	
Who: John West, Hope Works	
Tel: 321654987	
Email: jwest@noemail.com	
Cell: 031 123 4567	
Email - King Copiers: Customer keen to discuss upgrade	
When: 5 Dec 2019, 13:00-14:00	
Who: Jason King, King Copiers	
Tel: 0210134508	
Email: 0210134508	
Bus: 0210134508	
On Site inspection - Hope Works: Customer keen to update machines	
When: 5 Dec 2019, 10:00-11:00	
Who: Stewart Hope, Hope Works	

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1. As you select the check box,
2. The 3 Dashboard frames:
 - i. **Activities for the Last 30 Days**
 - ii. **1 Month Performance**
 - iii. **4 Month Pipeline**
 will automatically refresh.



Click anywhere outside of the expanded Settings frame to collapse it.

1. The figures in the 3 Dashboard frames:

i. **Activities for the Last 30 Days**

ii. **1 Month Performance**

iii. **4 Month Pipeline**

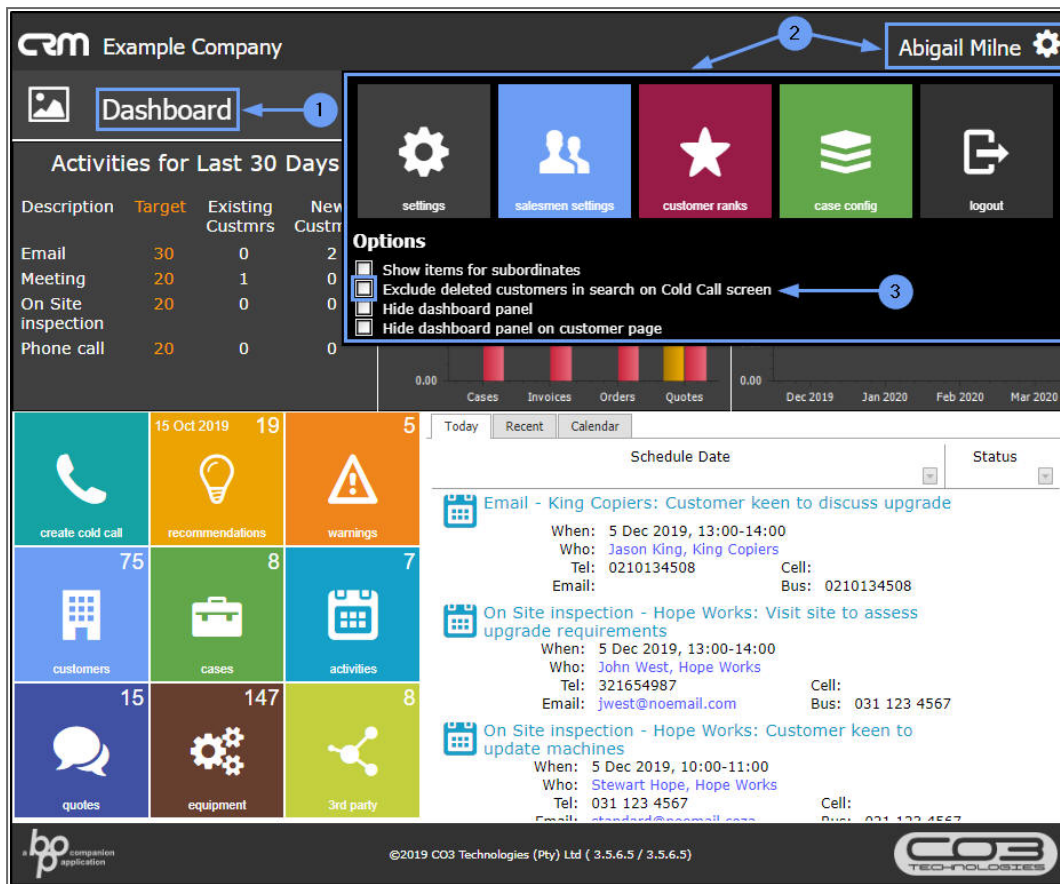
will now include the subordinates statistics.



EXCLUDE DELETED CUSTOMERS ON COLD CALL SCREEN

This will show only the Active customers when you are doing a search for a customer or contact.

1. In the **Home** page,
2. **Hover over** or click on the **User Name** or **Settings** icon to display the **Settings** frame.
3. In the **Options** list, select the **Exclude deleted customers in search on Cold call screen** check box.



The screenshot shows the CO3 CRM dashboard for 'Example Company'. The user 'Abigail Milne' is logged in. The dashboard includes a 'Dashboard' tab (1), a 'settings' icon (2), and a 'salesman settings' icon (3). The 'Options' section is expanded, showing the following settings:

- ☐ Show items for subordinates
- ☐ Exclude deleted customers in search on Cold Call screen
- ☐ Hide dashboard panel
- ☐ Hide dashboard panel on customer page

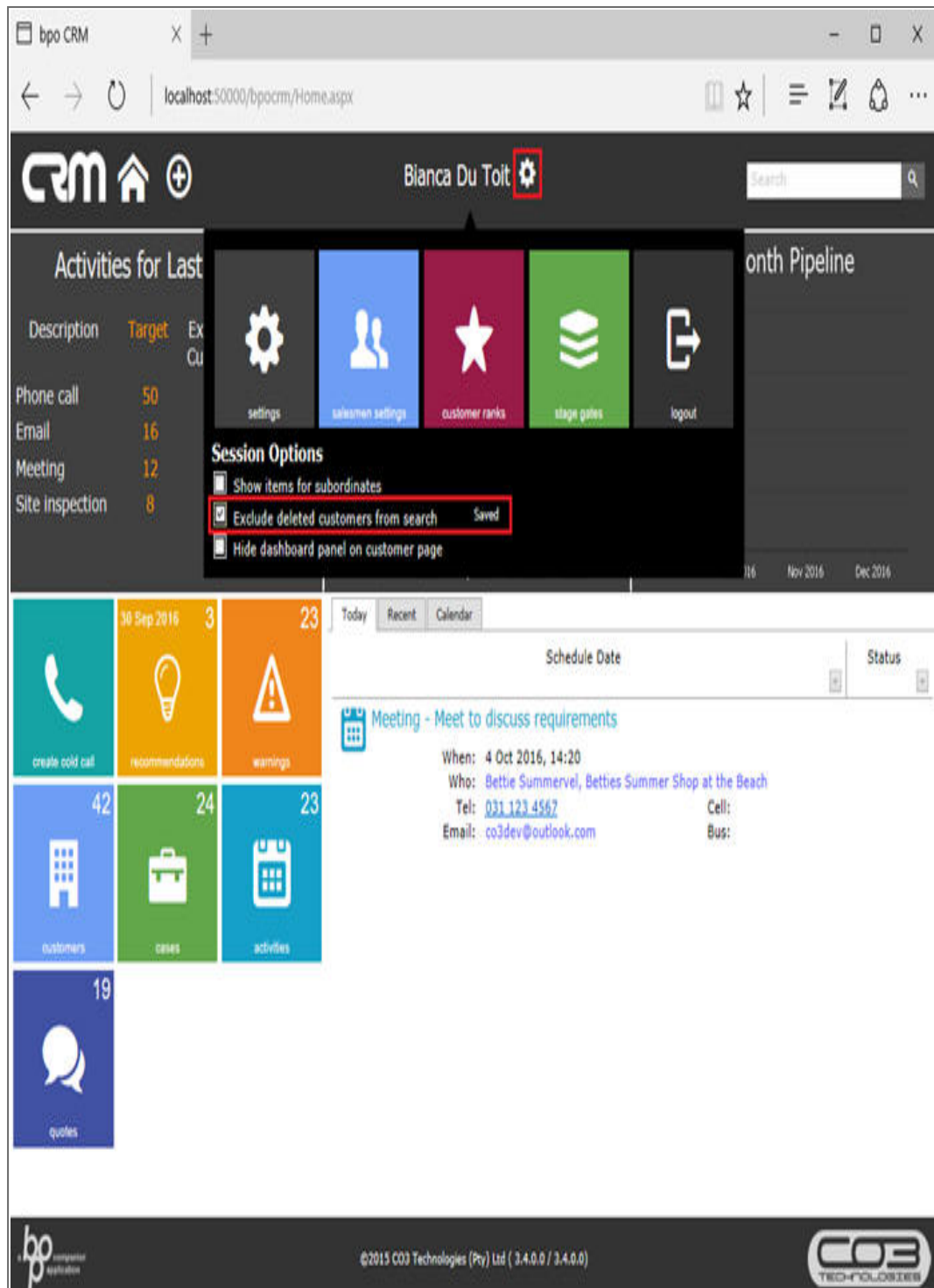
The dashboard also displays a table of activities for the last 30 days, a calendar view, and a list of upcoming tasks.

Description	Target	Existing Custrs	New Custr
Email	30	0	2
Meeting	20	1	0
On Site inspection	20	0	0
Phone call	20	0	0

The calendar view shows the following tasks:

- Email - King Copiers: Customer keen to discuss upgrade**
When: 5 Dec 2019, 13:00-14:00
Who: Jason King, King Copiers
Tel: 0210134508
Cell: 0210134508
Email: jwest@noemail.com
- On Site inspection - Hope Works: Visit site to assess upgrade requirements**
When: 5 Dec 2019, 13:00-14:00
Who: John West, Hope Works
Tel: 321654987
Cell: 031 123 4567
Email: jwest@noemail.com
- On Site inspection - Hope Works: Customer keen to update machines**
When: 5 Dec 2019, 10:00-11:00
Who: Stewart Hope, Hope Works
Tel: 031 123 4567
Cell: 031 123 4567
Email: stewart@noemail.com

View the results of this selection here...(tba)

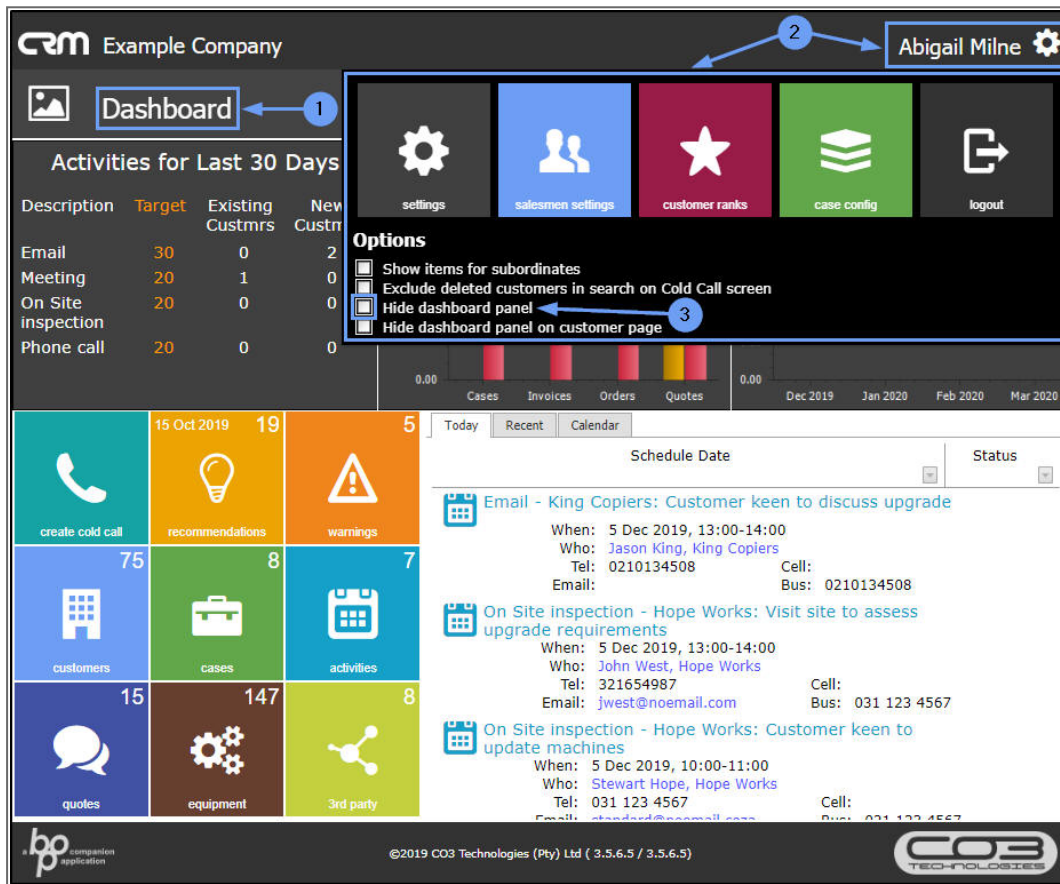


The screenshot shows the bpo CRM application interface. At the top, the user is logged in as Bianca Du Toit. The settings gear icon is highlighted with a red box. Below the settings icon, the 'Session Options' section is visible, with the 'Exclude deleted customers from search' checkbox checked and highlighted by a red box. The 'Save' button next to it is also highlighted. The interface includes a dashboard with various widgets: 'Activities for Last' (Phone call: 50, Email: 16, Meeting: 12, Site Inspection: 8), 'Month Pipeline', 'create cold call' (30 Sep 2016), 'recommendations' (3), 'warnings' (23), 'customers' (42), 'cases' (24), 'activities' (23), and 'quotes' (19). A meeting entry is shown: 'Meeting - Meet to discuss requirements' on 4 Oct 2016 at 14:20, with contact details for Bettie Summervel.

HIDE DASHBOARD PANEL

Hiding the Dashboard panel will give you more space to view the details on your Home page and Customer Home page.

1. In the **Home** page (Dashboard),
2. Hover over or click on the **User Name** or **Settings** icon to display the **Settings** frame.
3. In the **Options** list, select the **Hide Dashboard panel** check box.



The screenshot shows the CO3 CRM interface for 'Example Company'. The user 'Abigail Milne' is logged in. The 'Dashboard' panel is highlighted with a blue box and a red arrow labeled '1'. The 'Settings' icon is highlighted with a red arrow labeled '2'. The 'Options' menu is open, showing the 'Hide dashboard panel' option with a red arrow labeled '3' pointing to the checkbox.

Description	Target	Existing Custmr	New Custr
Email	30	0	2
Meeting	20	1	0
On Site inspection	20	0	0
Phone call	20	0	0

Options

- ☐ Show items for subordinates
- ☐ Exclude deleted customers in search on Cold Call screen
- ☐ Hide dashboard panel
- ☐ Hide dashboard panel on customer page

Summary Cards:

- create cold call: 15 Oct 2019, 19
- recommendations: 75
- warnings: 5
- customers: 8
- cases: 147
- activities: 7
- quotes: 15
- equipment: 8
- 3rd party: 8

Calendar View:

Today | Recent | Calendar

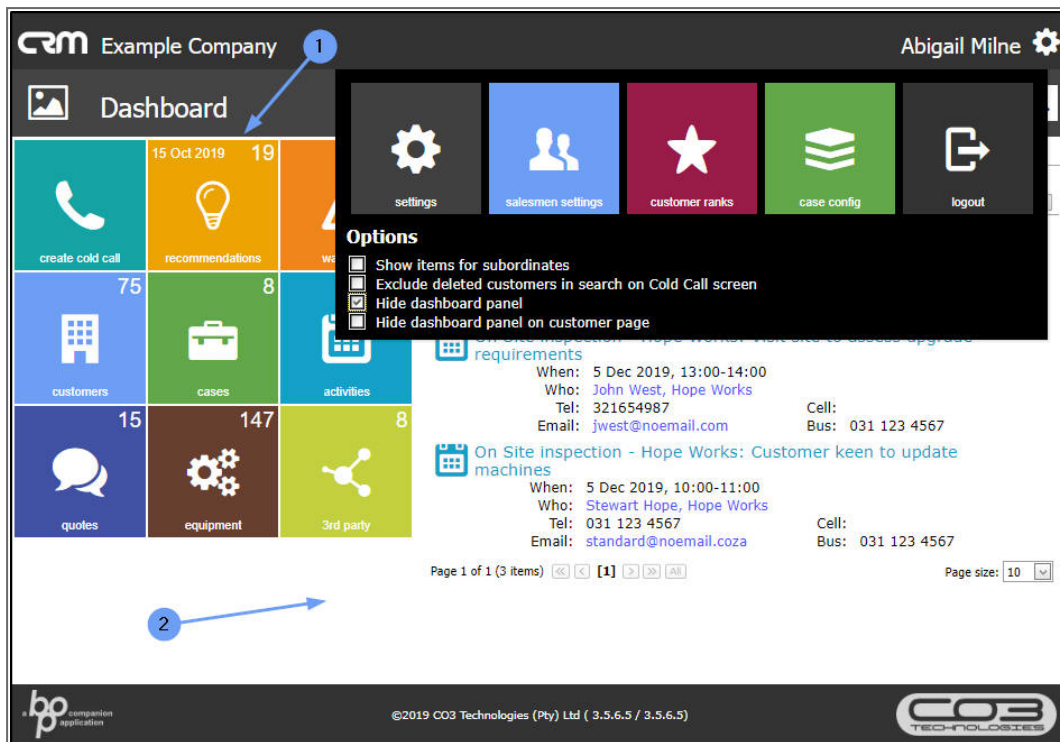
Schedule Date: [Dropdown] | Status: [Dropdown]

Events:

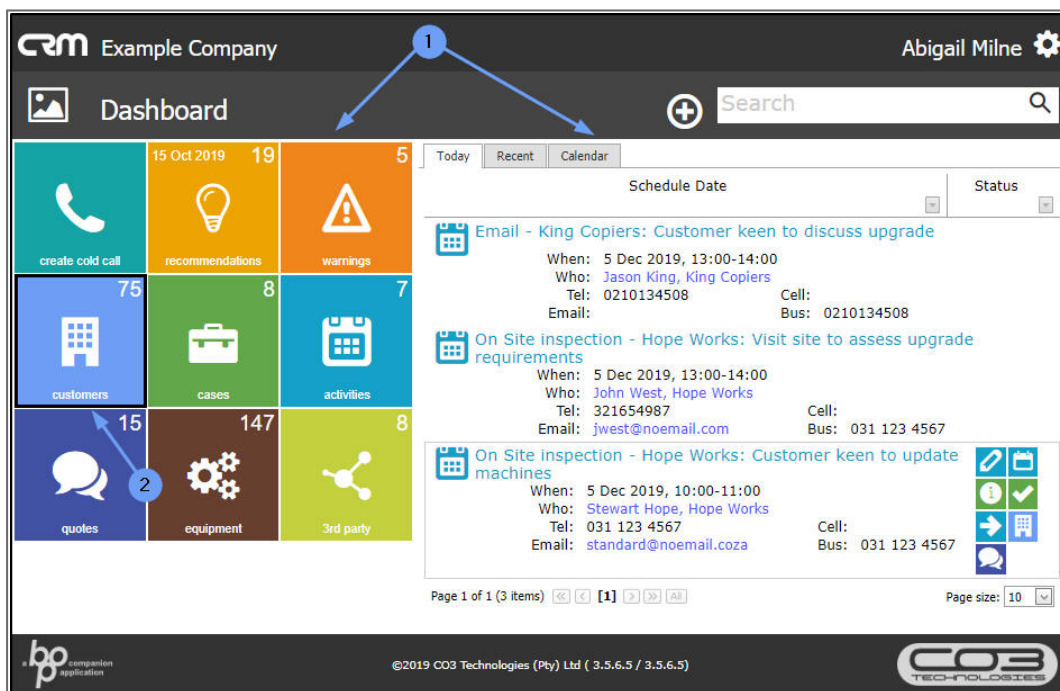
- Email - King Copiers: Customer keen to discuss upgrade**
When: 5 Dec 2019, 13:00-14:00
Who: Jason King, King Copiers
Tel: 0210134508 | Cell: 0210134508
Email: [Email]
- On Site Inspection - Hope Works: Visit site to assess upgrade requirements**
When: 5 Dec 2019, 13:00-14:00
Who: John West, Hope Works
Tel: 321654987 | Cell: 031 123 4567
Email: jwest@noemail.com
- On Site Inspection - Hope Works: Customer keen to update machines**
When: 5 Dec 2019, 10:00-11:00
Who: Stewart Hope, Hope Works
Tel: 031 123 4567 | Cell: 031 123 4567
Email: stewart@noemail.com

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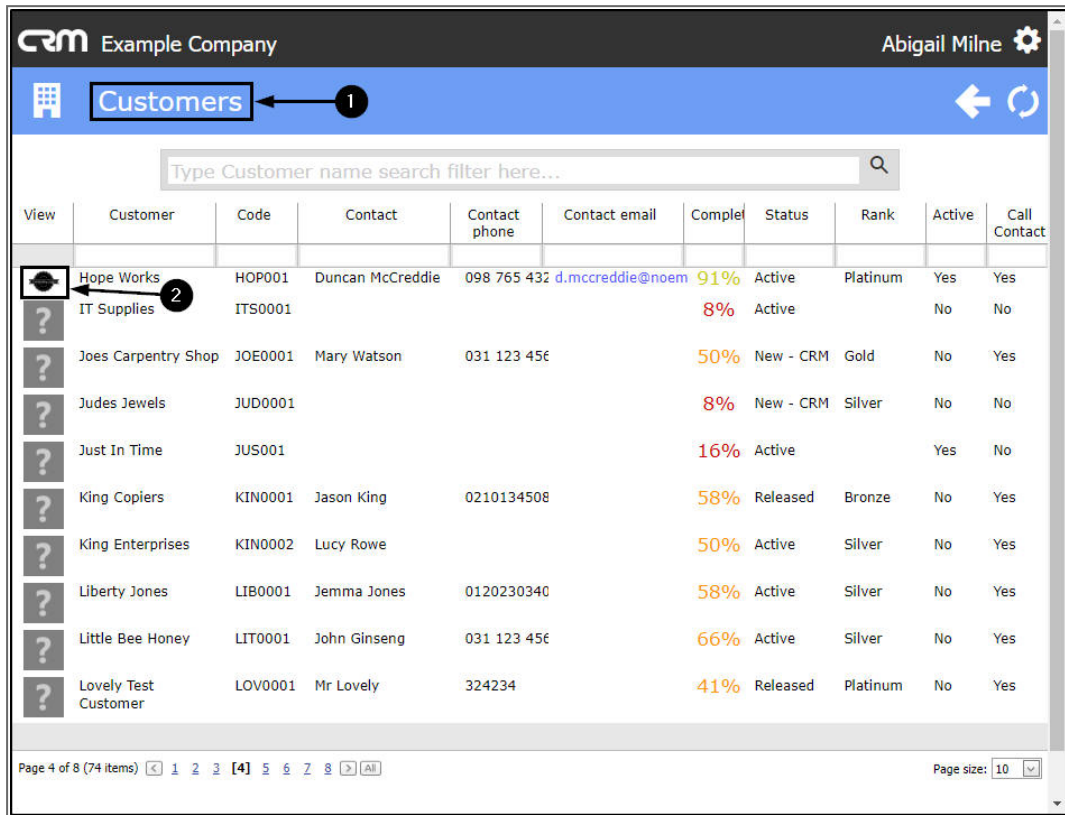
1. The Dashboard will be removed from the Home page.
2. Click anywhere outside of the Settings panel to collapse it to view the Home page fully.



1. You can now view the Home page without the Dashboard.
2. Click on the **Customers** tile.



1. The **Customers** listing page will open.
2. Select any Customer by clicking on the **Customer icon** in the **View** column.



View	Customer	Code	Contact	Contact phone	Contact email	Comple	Status	Rank	Active	Call Contact
	Hope Works	HOP001	Duncan McCreddie	098 765 432	d.mccredie@noem	91%	Active	Platinum	Yes	Yes
	IT Supplies	ITS0001				8%	Active		No	No
	Joes Carpentry Shop	JOE0001	Mary Watson	031 123 456		50%	New - CRM	Gold	No	Yes
	Judes Jewels	JUD0001				8%	New - CRM	Silver	No	No
	Just In Time	JUS001				16%	Active		Yes	No
	King Copiers	KIN0001	Jason King	0210134508		58%	Released	Bronze	No	Yes
	King Enterprises	KIN0002	Lucy Rowe			50%	Active	Silver	No	Yes
	Liberty Jones	LIB0001	Jemma Jones	0120230340		58%	Active	Silver	No	Yes
	Little Bee Honey	LIT0001	John Ginseng	031 123 456		66%	Active	Silver	No	Yes
	Lovely Test Customer	LOV0001	Mr Lovely	324234		41%	Released	Platinum	No	Yes

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Page size: 10

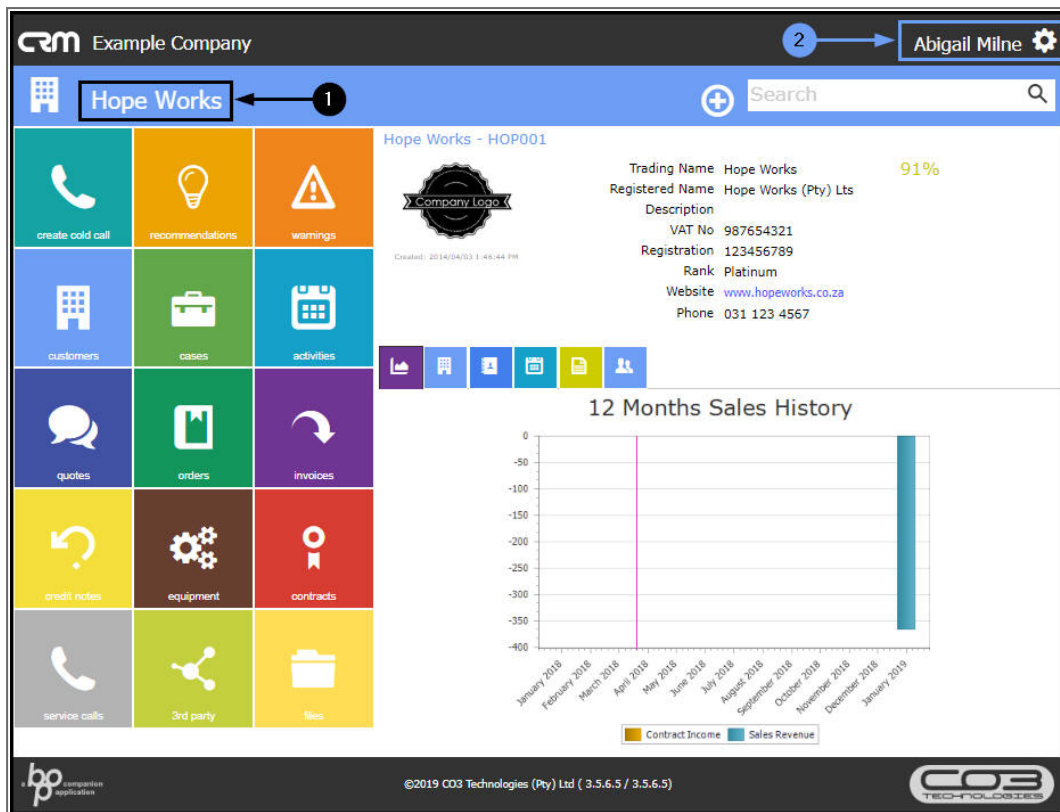
1. The selected **Customer Home** page will open.
2. The Dashboard will also be hidden in this page.



RE-INSTATE THE DASHBOARD VIA CUSTOMER HOME PAGE

The process to **re-instate** the Dashboard is the same from either the **Home** page or **Customer** Home page. For the purpose of this manual we explain the process from the **Customer** Home page.

1. In the **Customer** Home page,
2. Hover over or click on the **User Name** or **Settings** icon.



CRM Example Company

2 Abigail Milne

1 Hope Works

Hope Works - HOP001

Trading Name Hope Works 91%

Registered Name Hope Works (Pty) Lts

Description

VAT No 987654321

Registration 123456789

Rank Platinum

Website www.hopeworks.co.za

Phone 031 123 4567

12 Months Sales History

Contract Income Sales Revenue

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1. The **Settings** frame will be displayed.
2. **Deselect** the **Hide Dashboard panel** check box.



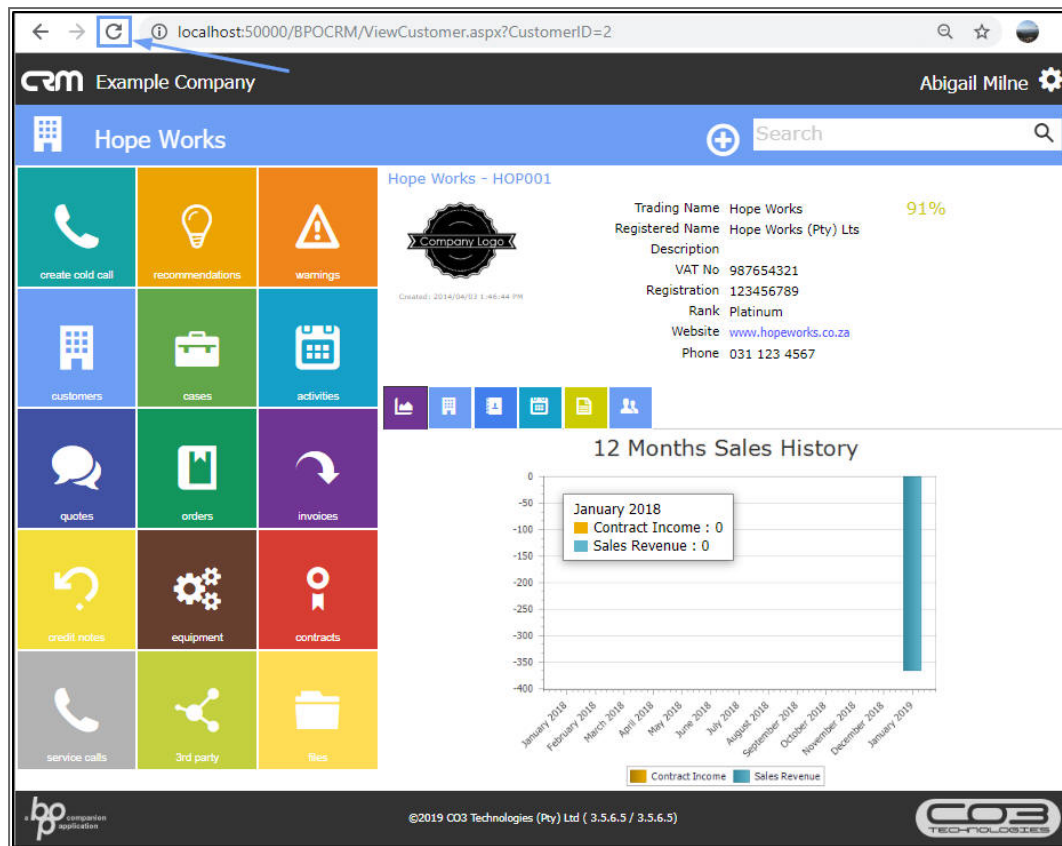
The screenshot shows the CO3 CRM interface for 'Example Company'. The top bar includes the company name, user 'Abigail Milne', and a settings gear icon. The main dashboard is divided into a left sidebar with various functional tiles (e.g., create cold call, recommendations, warnings, customers, cases, activities, quotes, orders, invoices, credit notes, equipment, contracts, service calls, 3rd party, files) and a right panel. The right panel contains a settings menu with options like 'settings', 'salesmen settings', 'customer ranks', 'case config', and 'logout'. Below this is an 'Options' section with checkboxes for 'Show items for subordinates', 'Exclude deleted customers in search on Cold Call screen', 'Hide dashboard panel', and 'Hide dashboard panel on customer page'. A blue arrow labeled '1' points to the 'warnings' tile, and another blue arrow labeled '2' points to the 'Hide dashboard panel' checkbox. Below the settings panel is a '12 Months Sales History' bar chart showing 'Contract Income' (orange) and 'Sales Revenue' (blue) from January 2018 to January 2019. The chart shows a significant drop in Sales Revenue in January 2019.

1. As you deselect the Hide Dashboard panel option,
2. A message box will pop up in the Settings panel advising you to
 - ***Refresh page to show dashboard.***



The screenshot displays the CO3 CRM interface for 'Example Company'. The top navigation bar includes the company name, user name 'Abigail Milne', and a settings gear icon. The left sidebar contains a grid of icons for various functions: create cold call, recommendations, warnings, customers, cases, activities, quotes, orders, invoices, credit notes, equipment, contracts, service calls, 3rd party, and files. The top right navigation bar includes icons for settings, salesmen settings, customer ranks, case config, and logout. The 'Options' panel is open, showing checkboxes for 'Show items for subordinates', 'Exclude deleted customers in search on Cold Call screen', 'Hide dashboard panel', and 'Hide dashboard panel on customer page'. A blue box highlights the 'Hide dashboard panel' option, and a blue arrow points to a 'Refresh page to show dashboard' button. The main dashboard area displays a '12 Months Sales History' bar chart with 'Contract Income' and 'Sales Revenue' data.

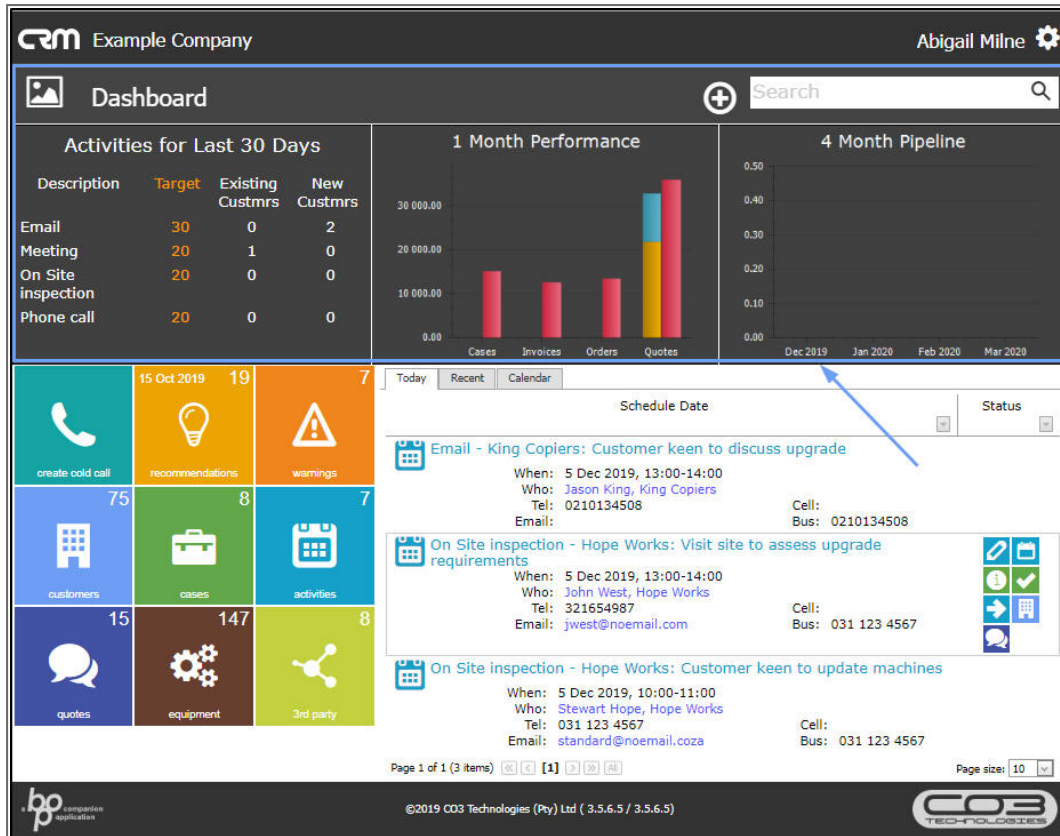
- **Refresh** the page.



1. The Dashboard panel can now be viewed in the Customer Home page.
2. Click on the **CRM logo** to return to the **Home** page.



1. The Dashboard panel can also now be viewed in the **Home** page again.



HIDE DASHBOARD PANEL ON CUSTOMER PAGE

Hiding the Dashboard panel on the Customer Home page will give you more space to view the details in this page. This selection will not hide the Dashboard panel on the Home page.

You can select this setting option *either* from the **Home** page or from the **Customer Home** page.

SELECT OPTION FROM HOME PAGE

1. In the **Home** page,
2. Hover over or click on the **User Name** or **Settings** icon to display the **Settings** frame.

- To see the result of this selection, you will need to navigate to a ***Customer Home*** page.

- Dashboard

settings

salesmen settings

customer ranks

case config

logout

Options

☐ Show items for subordinates
☐ Exclude deleted customers in search on Cold Call screen
☐ Hide dashboard panel
☒ Hide dashboard panel on customer page

0.00

Cases

Invoices

Orders

Quotes

0.00

Dec 2019

Jan 2020

Feb 2020

Mar 2020

Today

Recent

Calendar

Schedule Date

Status

Phone call - Lovely Test Customer: Customer keen to discuss upgrade

When: 6 Dec 2019, 13:00-14:00

Who: Mr Lovely, Lovely Test Customer

Tel: 324234

Email: Cell: 324234

On Site inspection - Liberty Jones: Customer keen to upgrade

When: 6 Dec 2019, 13:00-14:00

Who: Jemma Jones, Liberty Jones

Tel: 0120230340

Email: Cell: 0120230340

Page 1 of 1 (2 items)

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All

Page size:

10

create cold call

recommendations

warnings

customers

cases

activities

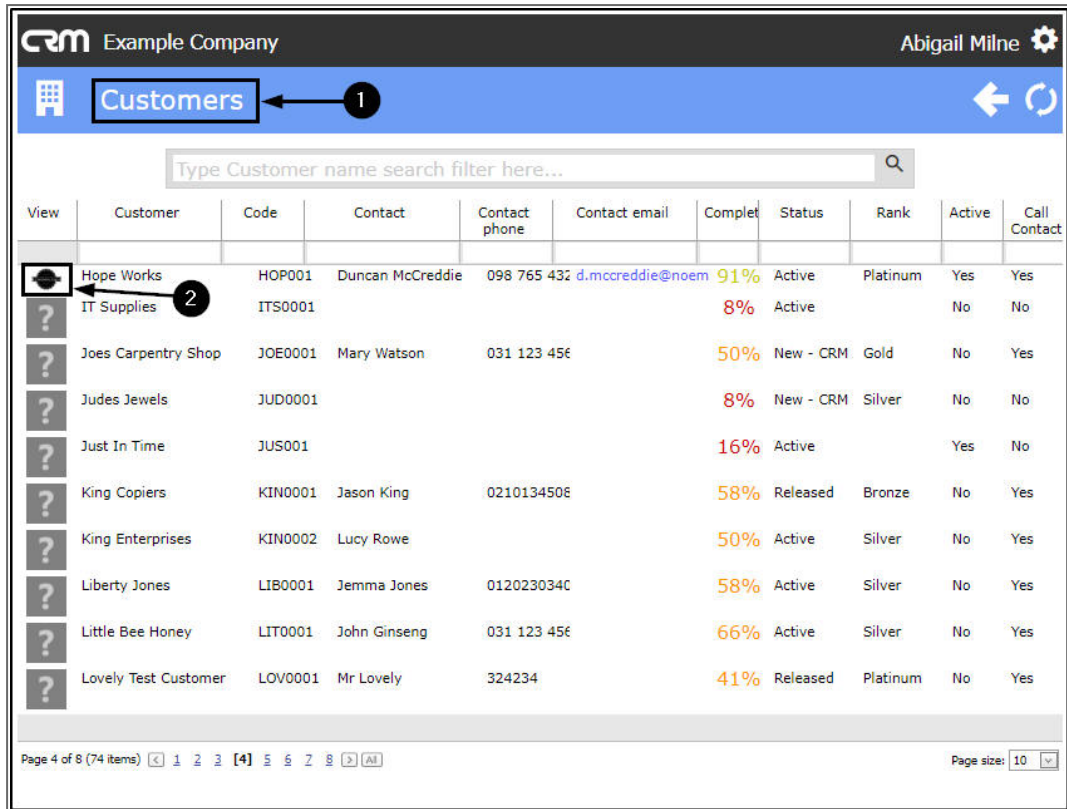
quotes

equipment

3rd party

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1. The **Customers** listing page will open.
2. Click on any **Customer icon** in the **View** column.



View	Customer	Code	Contact	Contact phone	Contact email	Comple	Status	Rank	Active	Call Contact
	Hope Works	HOP001	Duncan McCreddie	098 765 432	d.mccreddie@noem	91%	Active	Platinum	Yes	Yes
	IT Supplies	ITS0001				8%	Active		No	No
	Joes Carpentry Shop	JOE0001	Mary Watson	031 123 456		50%	New - CRM	Gold	No	Yes
	Judes Jewels	JUD0001				8%	New - CRM	Silver	No	No
	Just In Time	JUS001				16%	Active		Yes	No
	King Copiers	KIN0001	Jason King	0210134508		58%	Released	Bronze	No	Yes
	King Enterprises	KIN0002	Lucy Rowe			50%	Active	Silver	No	Yes
	Liberty Jones	LIB0001	Jemma Jones	0120230340		58%	Active	Silver	No	Yes
	Little Bee Honey	LIT0001	John Ginseng	031 123 456		66%	Active	Silver	No	Yes
	Lovely Test Customer	LOV0001	Mr Lovely	324234		41%	Released	Platinum	No	Yes

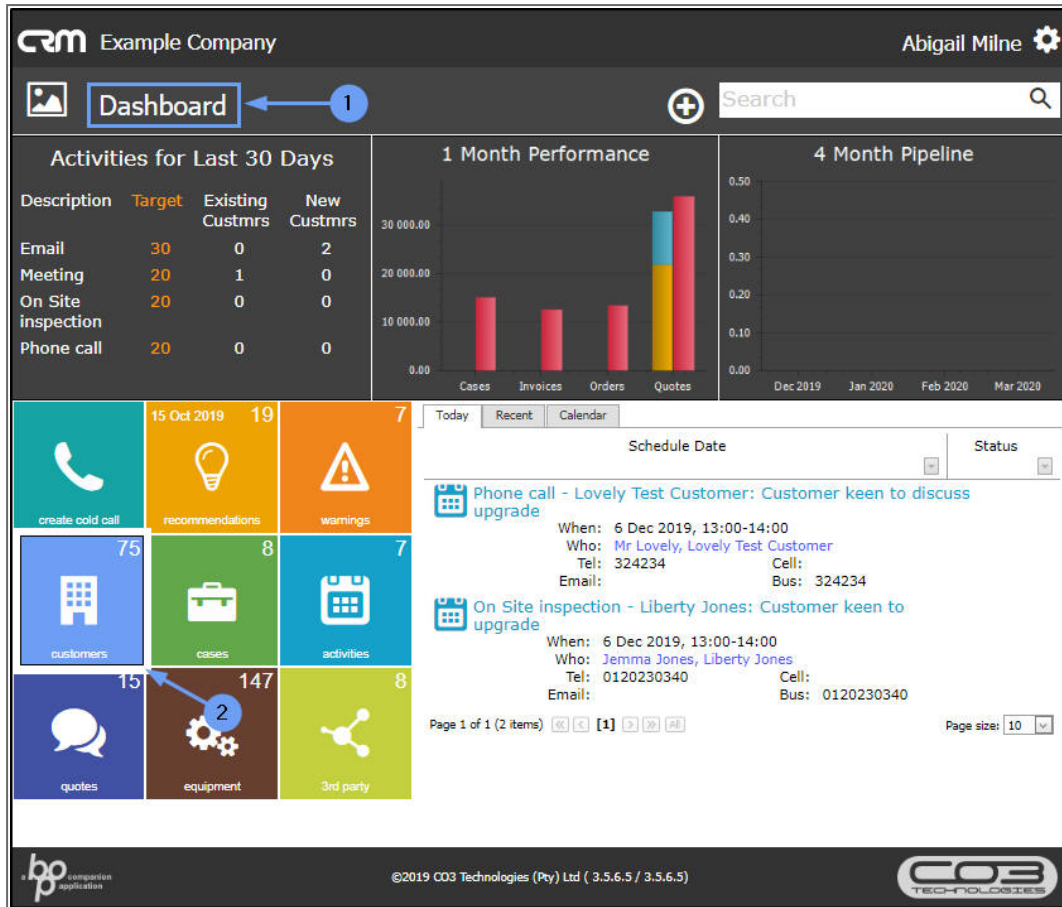
1. The **Customer Home** page will open.
2. The Dashboard will be **hidden** in this page.
3. Click on the **CRM logo** to return to the Home page.



The screenshot shows the CO3 CRM interface for a customer named 'Hope Works'. The top navigation bar includes the 'Hope Works' label and a search bar. A grid of tiles on the left provides quick access to various functions. The main area displays the customer's details, including trading name, registered name, VAT number, registration number, rank, website, and phone number. A '12 Months Sales History' chart is also shown.

SELECT OPTION FROM CUSTOMER HOMEPAGE

1. In the *Home* page,
2. Click on the *Customers* tile.



CRM Example Company Abigail Milne

Dashboard Search

Activities for Last 30 Days

Description	Target	Existing Custmrs	New Custmrs
Email	30	0	2
Meeting	20	1	0
On Site inspection	20	0	0
Phone call	20	0	0

1 Month Performance

4 Month Pipeline

create cold call 15 Oct 2019 19 **recommendations** 7 **warnings** 7

customers 75 **cases** 8 **activities** 7

quotes 15 **equipment** 147 **3rd party** 8

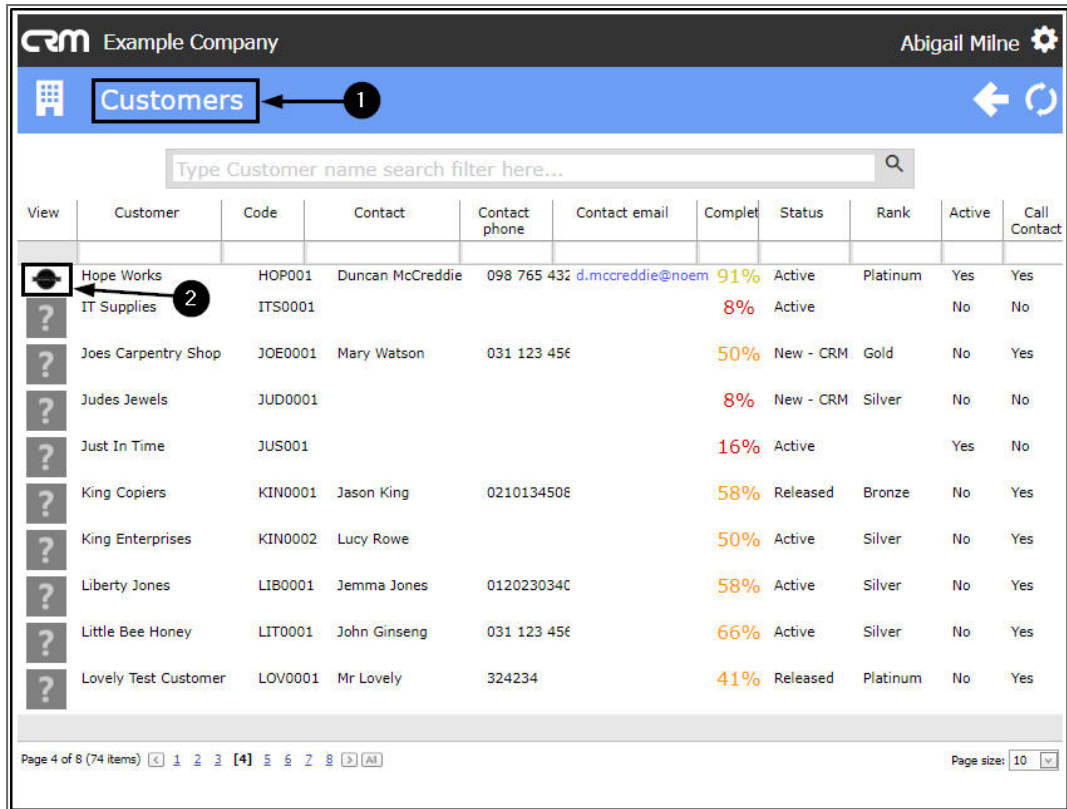
Phone call - Lovely Test Customer: Customer keen to discuss upgrade

When: 6 Dec 2019, 13:00-14:00
 Who: Mr Lovely, Lovely Test Customer
 Tel: 324234 Cell: 324234
 Email: Bus: 324234

On Site inspection - Liberty Jones: Customer keen to upgrade

When: 6 Dec 2019, 13:00-14:00
 Who: Jemma Jones, Liberty Jones
 Tel: 0120230340 Cell: 0120230340
 Email: Bus: 0120230340

Page 1 of 1 (2 items) [1] [2] [3] [4] [5] [6] [7] [8] [9] [10] [11] [12] [13] [14] [15] [16] [17] [18] [19] [20] [21] [22] [23] [24] [25] [26] [27] [28] [29] [30] [31] [32] [33] [34] [35] [36] [37] [38] [39] [40] [41] [42] [43] [44] [45] [46] [47] [48] [49] [50] [51] [52] [53] [54] [55] [56] [57] [58] [59] [60] [61] [62] [63] [64] [65] [66] [67] [68] [69] [70] [71] [72] [73] [74] [75] [76] [77] [78] [79] [80] [81] [82] [83] [84] [85] [86] [87] [88] [89] [90] [91] [92] [93] [94] [95] [96] [97] [98] [99] [100] [101] [102] [103] [104] [105] [106] [107] [108] [109] [110] [111] [112] [113] [114] [115] [116] [117] [118] [119] [120] [121] [122] [123] [124] [125] [126] [127] [128] [129] [130] [131] [132] [133] [134] [135] [136] [137] [138] [139] [140] [141] [142] [143] [144] [145] [146] [147] [148] [149] [150] [151] [152] [153] [154] [155] [156] [157] [158] [159] [160] [161] [162] [163] [164] [165] [166] [167] [168] [169] [170] [171] [172] [173] [174] [175] [176] [177] [178] [179] [180] [181] [182] [183] [184] [185] [186] [187] [188] [189] [190] [191] [192] [193] [194] [195] [196] [197] [198] [199] [200] [201] [202] [203] [204] [205] [206] [207] [208] [209] [210] [211] [212] [213] [214] [215] [216] [217] [218] [219] [220] [221] [222] [223] [224] [225] [226] [227] [228] [229] [230] [231] [232] [233] [234] [235] [236] [237] [238] [239] [240] [241] [242] [243] [244] [245] [246] [247] [248] [249] [250] [251] [252] [253] [254] [255] [256] [257] [258] [259] [260] [261] [262] [263] [264] [265] [266] [267] [268] [269] [270] [271] [272] [273] [274] [275] [276] [277] [278] [279] [280] [281] [282] [283] [284] [285] [286] [287] [288] [289] [290] [291] [292] [293] [294] [295] [296] [297] [298] [299] [300] [301] [302] [303] [304] [305] [306] [307] [308] [309] [310] [311] [312] [313] [314] [315] [316] [317] [318] [319] [320] [321] [322] [323] [324] [325] [326] [327] [328] [329] [330] [331] [332] [333] [334] [335] [336] [337] [338] [339] [340] [341] [342] [343] [344] [345] [346] [347] 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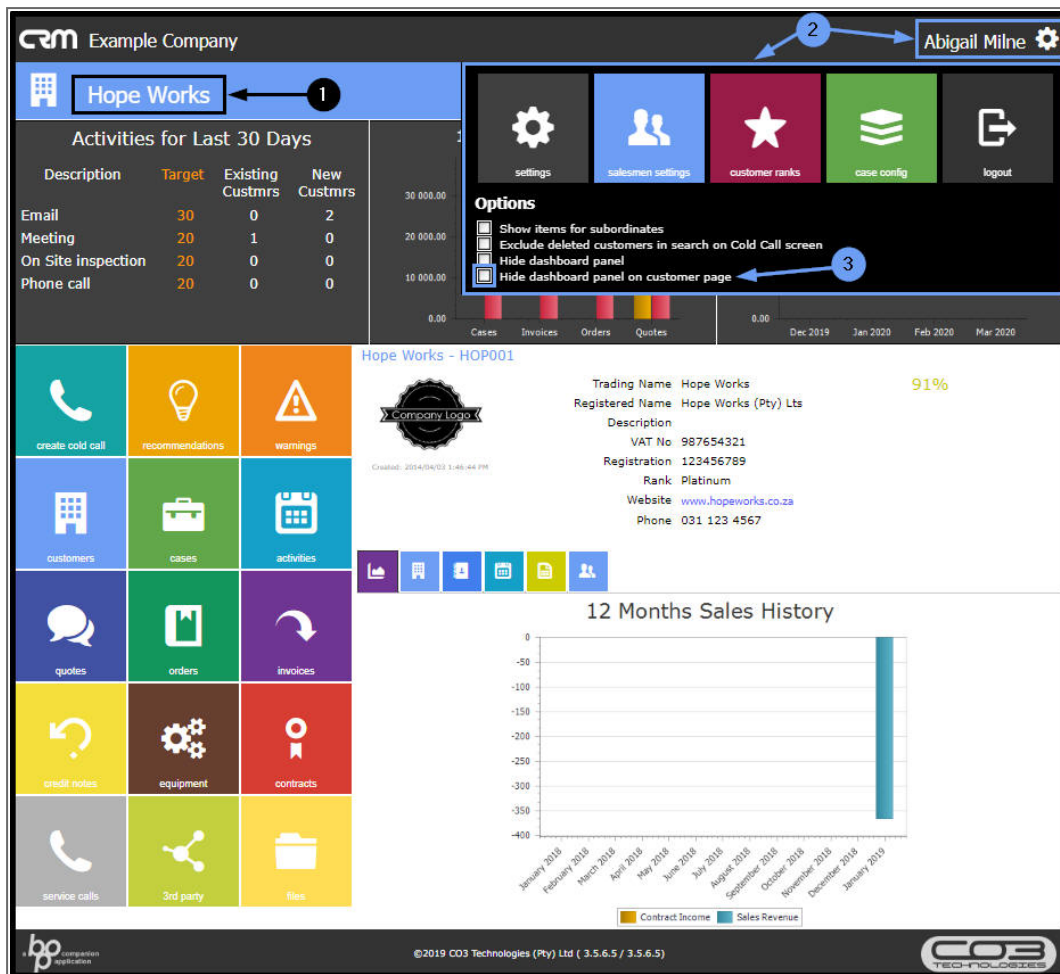


View	Customer	Code	Contact	Contact phone	Contact email	Comple	Status	Rank	Active	Call Contact
	Hope Works	HOP001	Duncan McCreddie	098 765 432	d.mccreddie@noem	91%	Active	Platinum	Yes	Yes
	IT Supplies	ITS0001				8%	Active		No	No
	Joes Carpentry Shop	JOE0001	Mary Watson	031 123 456		50%	New - CRM	Gold	No	Yes
	Judes Jewels	JUD0001				8%	New - CRM	Silver	No	No
	Just In Time	JUS001				16%	Active		Yes	No
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	King Enterprises	KIN0002	Lucy Rowe			50%	Active	Silver	No	Yes
	Liberty Jones	LIB0001	Jemma Jones	0120230340		58%	Active	Silver	No	Yes
	Little Bee Honey	LIT0001	John Ginseng	031 123 456		66%	Active	Silver	No	Yes
	Lovely Test Customer	LOV0001	Mr Lovely	324234		41%	Released	Platinum	No	Yes

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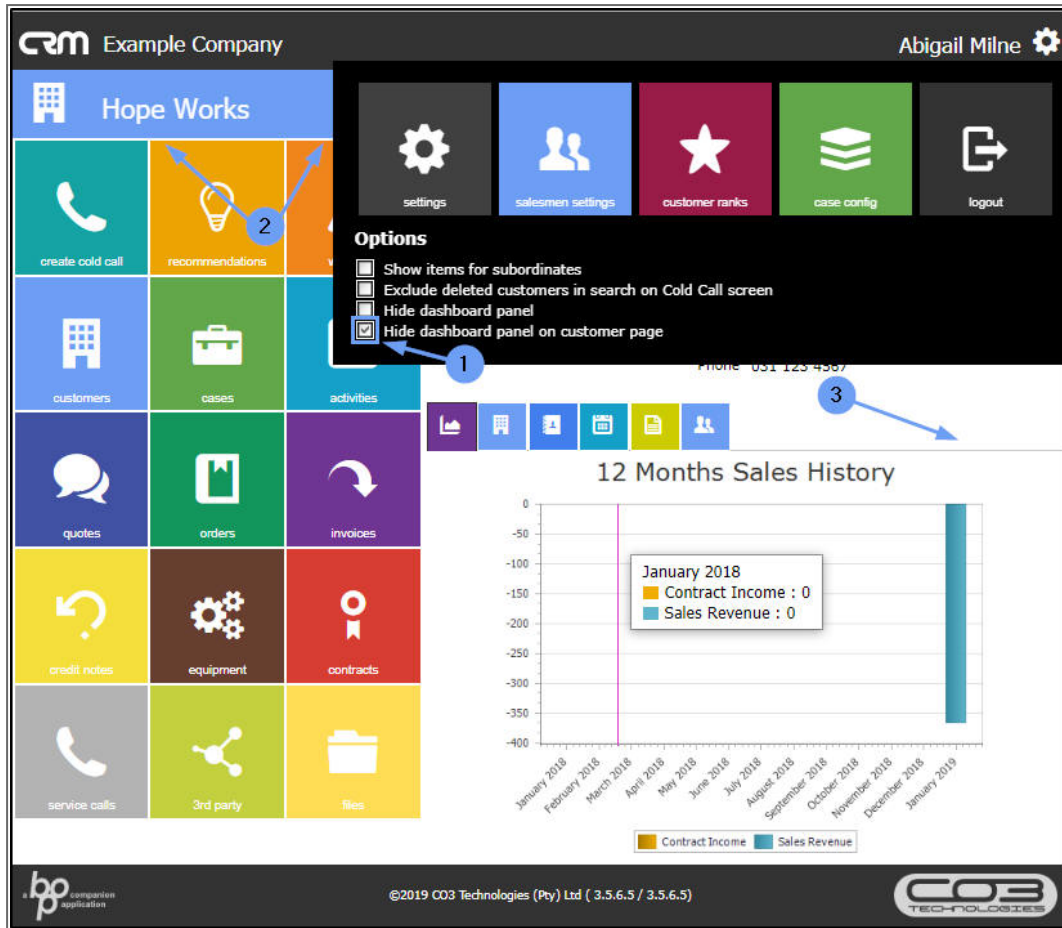
Page size:

1. The **Customer Home** page will open.
2. Hover over or click on the **User Name** or **Settings** icon to display the **Settings** frame.
3. In the **Options** list, select the **Hide Dashboard panel on customer page** check box.



The screenshot shows the CO3 CRM interface for 'Example Company'. The user is 'Abigail Milne'. The 'Settings' menu is open, showing options for 'settings', 'salesmen settings', 'customer ranks', 'case config', and 'logout'. The 'Options' panel is open, showing settings for 'Hope Works'. The 'Options' panel includes checkboxes for 'Show items for subordinates', 'Exclude deleted customers in search on Cold Call screen', 'Hide dashboard panel', and 'Hide dashboard panel on customer page'. The 'Hide dashboard panel' checkbox is checked, and the 'Hide dashboard panel on customer page' checkbox is also checked. The 'Options' panel is titled 'Options' and has a close button. The 'Options' panel is also titled 'Options' and has a close button. The 'Options' panel is also titled 'Options' and has a close button.

1. As you **select** the check box,
2. The Dashboard will be **hidden** in the page.
3. Click anywhere outside of the Settings frame to **collapse** it.

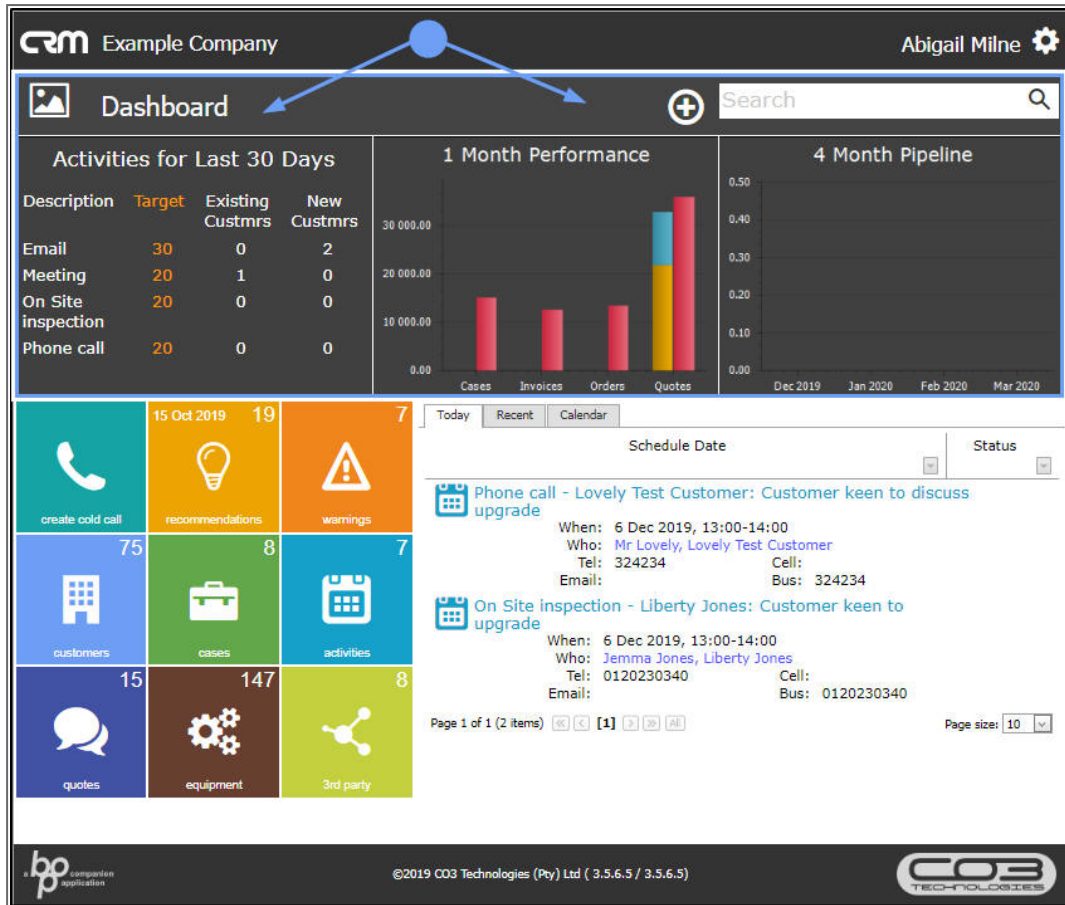


The screenshot shows the CRM interface for 'Example Company' with user 'Abigail Milne'. The left sidebar contains a 'Hope Works' section with various icons for functions like 'create cold call', 'recommendations', 'customers', 'cases', 'activities', 'quotes', 'orders', 'invoices', 'credit notes', 'equipment', 'contracts', 'service calls', '3rd party', and 'files'. The top right has navigation buttons for 'settings', 'salesman settings', 'customer ranks', 'case config', and 'logout'. An 'Options' menu is open, showing checkboxes for 'Show items for subordinates', 'Exclude deleted customers in search on Cold Call screen', 'Hide dashboard panel', and 'Hide dashboard panel on customer page'. A '12 Months Sales History' chart is displayed, showing 'Contract Income' (yellow) and 'Sales Revenue' (blue) from January 2018 to January 2019. The chart shows a significant drop in sales revenue in January 2019.

1. You can now view the whole page **without** the Dashboard
2. Click on the **CRM logo** to return to the **Home page**.



- The Dashboard is still **visible** in this page.



CRM.000.022

