

HOW TO CREATE YOUR OWN CRM BUBBLES AND ANALYSIS FIELDS

sales-i allows Power Users (only) to create analysis fields which can then be reported on within the Enquiries section. This guide will show you how.





From the black navigation bar at the top of

the screen, click **CONTROL PANEL**.



03 Now, click Setup.





04

Click on **Custom Sections** (the bottom option).

You can now either edit an existing section or add a new section.

Interested in editing an exisiting section? Click on the section and Skip to step 6.

To add a new section, click the **Add New Section** in the top right hand corner. Now you need to give your CRM bubble/section a name.

> To do so, type in a name and click the green Add Section button.

Your new section has now been created.







 $06 \ \ \, {\rm Now \ we \ need \ to \ add \ new \ options \ into \ your \ section.}$

Click Add New Field.

07 Give the field a **Name** and select **List** from the type.

> It is vital you select **List** as this will ensure the field shows as a bubble (so you can then report on it).

Finally, click the green **Add Field** button.

Customer Credit Inl	formation				
Switched Business F	Form				
Visit log					
Competitor threat					
CRM only	Add New Field	1			×
GI	Name:	How many stores?			
	Type:	Text 🗘			0111
	2	Text Number			1.1.1.1
Brewery	8	List Checkbox Date	Add	Field Cancel	
test		Time Long Text Currency			
Number of stores	111111	2444411111			
Number of stores	Translate				

Switched Business Form	*
Visit log	*
Competitor threat	•
CRM only example	•
Gin	*
Whisky	*
Competitor Information	*
Brewery Tour	•
test	*
Number of stores	•
Number of stores Insudate	Add New Field Delete
	Exclude from Mandatory Engulities
How many stores?	List 0 0 Est List Dokte



08 You can now choose to make the field mandatory for the user to fill by ticking the check box under Mandatory.

> You can also choose to exclude this field from Enquiries if you wish.

Next, click the Edit List Button.



Nou now need to select what the drop down options for your list will be.

You can enter as many options as you like.

Please Note: We recommend not adding too many options as this keeps data entry fast and efficient for the user.

	Edit List		
	Description Translate		• ///////
	Please Select	*	
111.0 .			
1-5		Add Ite	m
		OK Cancel	000000
		111111111	711111



10 Once you have entered your drop down options click the green **OK** button.

11 Finally, click the green **Update** button to save your new analysis field.

This will update the field so they are useable by all users across both desktop and mobile versions of sales-i.



		_		_	_						_
ñ we	 ownouse 	E course.	E reason s	arover 1	CONTRACT POINT						Larkqida
ULCCSNIC1	ADDED YOURC	2000 A . • 400	ans 💌 search	South	VERSION		International states with the states.				
😌 Mit	dare Flavor,	(1917-1911) Seventer 20									
O Colour	@ Arrow @	College City	n Diprovide	O, Search Filter IO	Smot Draukter						
C sum of the											
Calorett		~	~	Produktion and Production of	~	~	~		~	~	~
• •	•	0	0	- C	2	Θ	\odot	0	0	0	0
Rev i have	al Valore	Bar 1	dan sen lines	Another States	Freehold Min. 20 August 2	(ata)	Annua 1	Analysis Sa	Amber	Cannot as loss : millips -	Cartana
0	6	0	6					6	ര	6	6
Carlos and	• Margineze		Trachery						e.	Den of Den	New York
								0	0	0	0
								Context sees Context and	Mult Low	han Milana	198.64
								0	0	0	0
								0	0	0	0
										Photos P	44
								0	0	0	0
								Its my true?	Sec.		
								((11)			

12 You are now able to update details for customers or prospects via their Customer record card.

> You can also report on your new CRM bubble via selecting Enquiries and then selecting your bubble from the CRM analysis section.