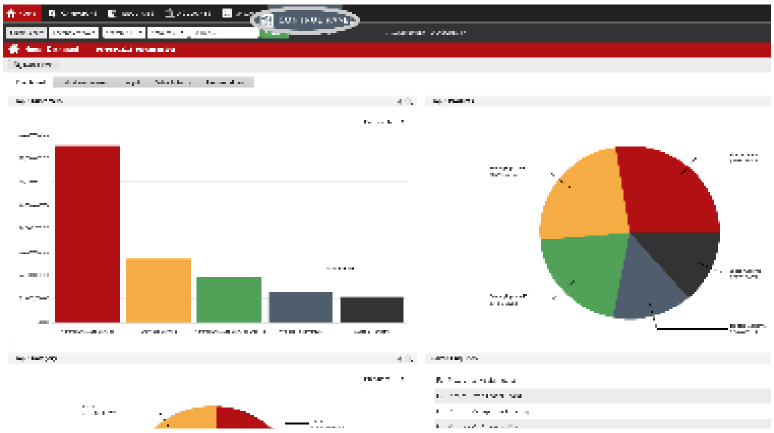
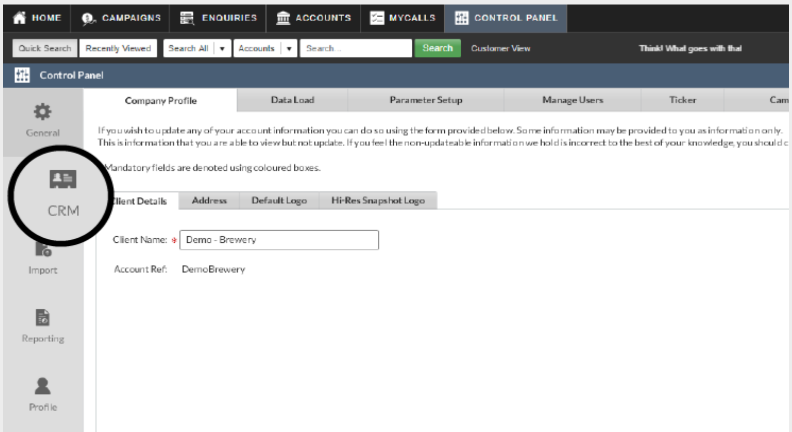
HOW TO CREATE YOUR OWN CRM BUBBLES AND ANALYSIS FIELDS

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.

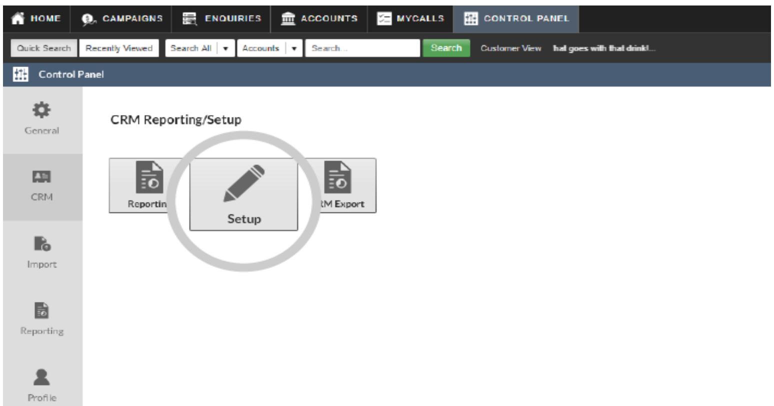
01 From the black navigation bar at the top of the screen, click **CONTROL PANEL**.





02 Next, click **CRM**.

03 Now, click **Setup**.



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

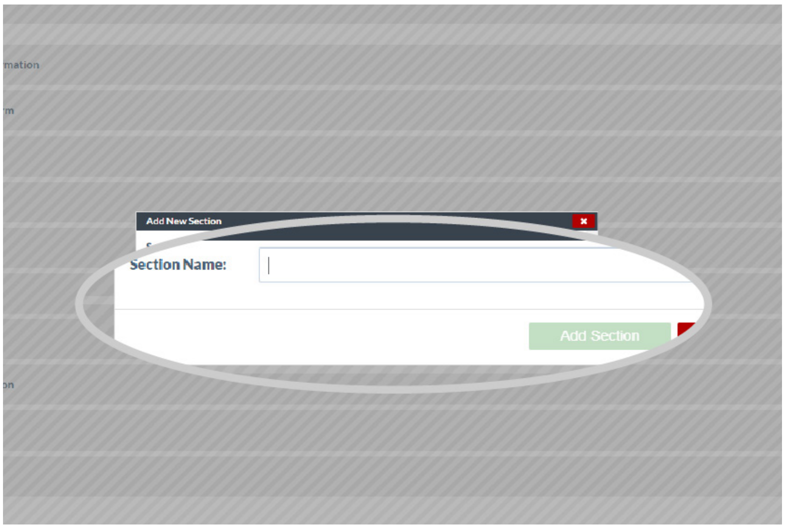
You can now either edit an existing section or add a new section.
Interested in editing an exisiting section? Click on the section and Skip to step 6.

To add a new section, click the **Add New Section** in the top right hand corner.

05 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.



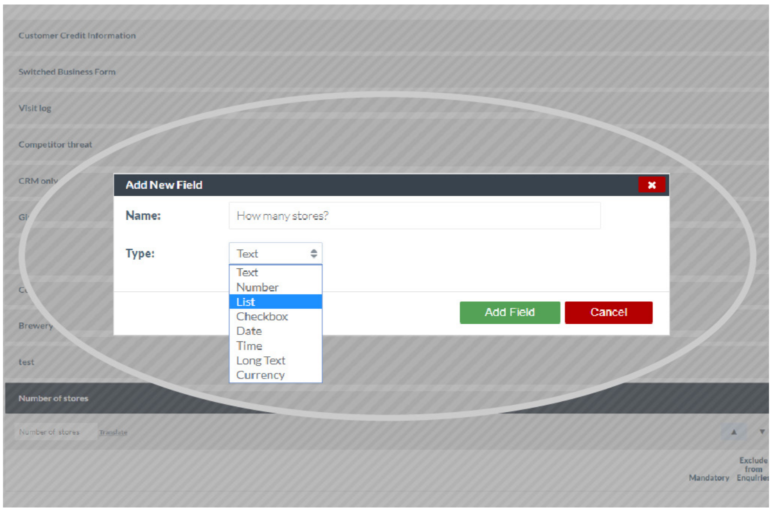
06 Now we need to add new options into your section.

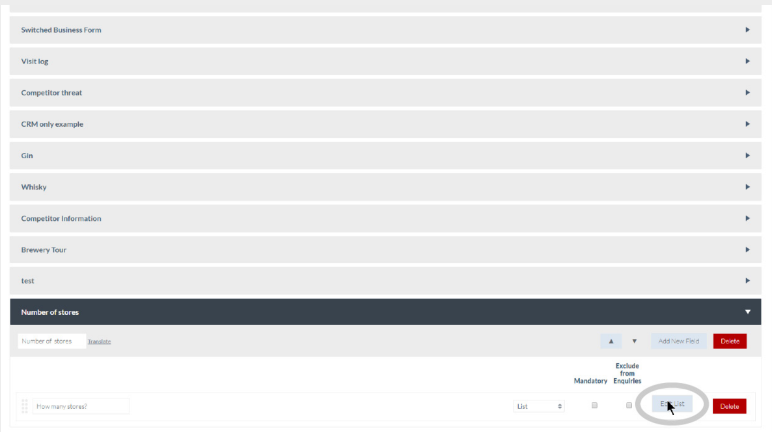
Click **Add New Field.**

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.





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

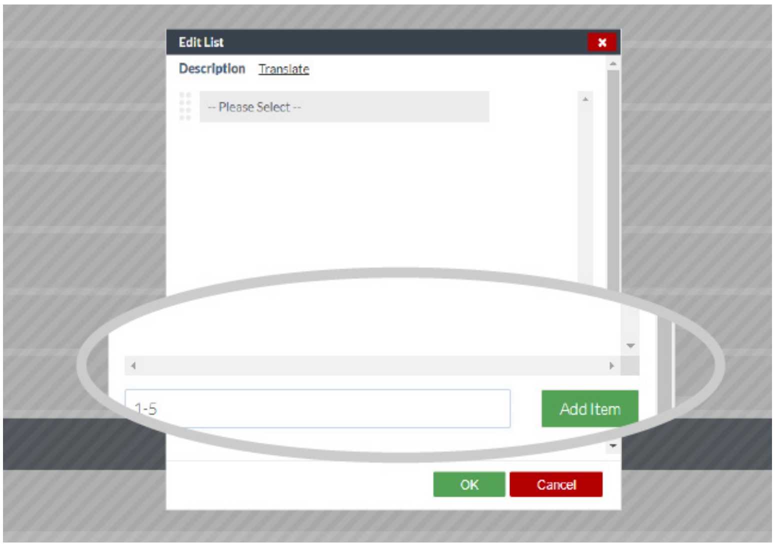
You can also choose to exclude this field from Enquiries if you wish.

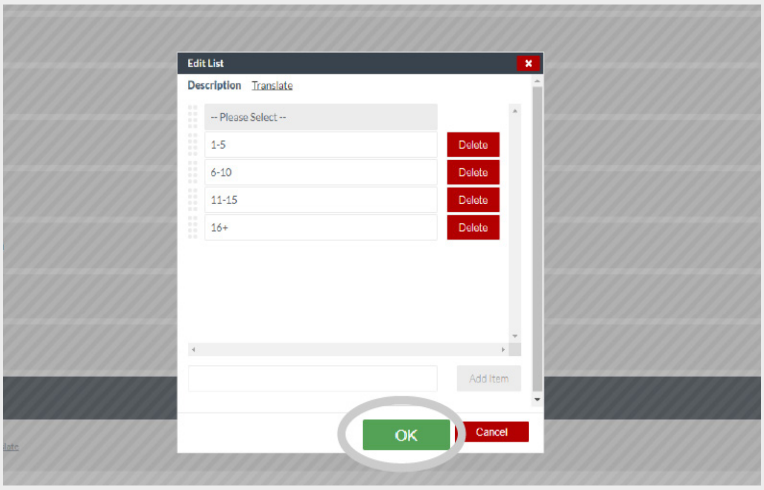
Next, click the **Edit List** Button.

09 You 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.

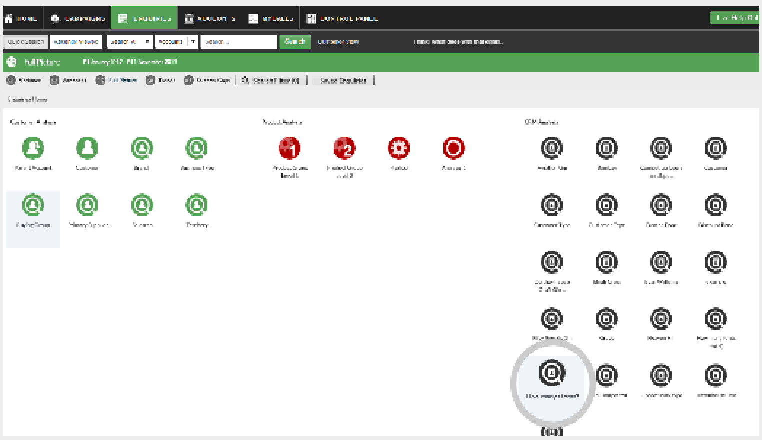




10 Once you have entered your drop down options click the green **OK** button.

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.



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.