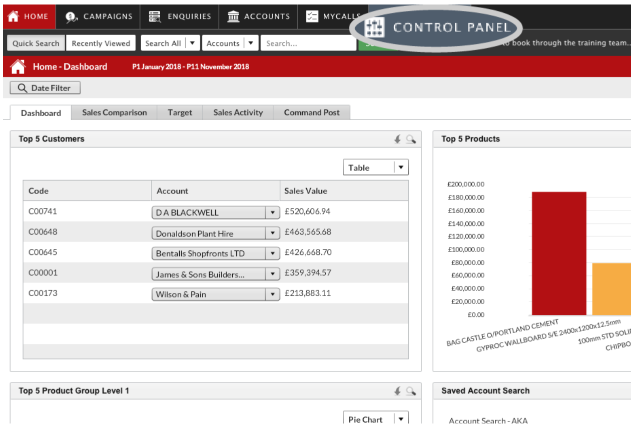
sales-i™ SELL SMART

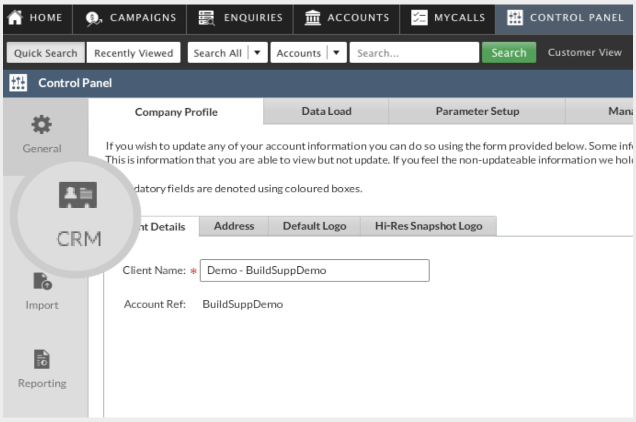
HOW TO CUSTOMIZE THE CRM/RECORD CARD

This guide will show you how to add a new segmentation field to the customer record card.
We will then look at how you report on this custom field to relate it to sales data.

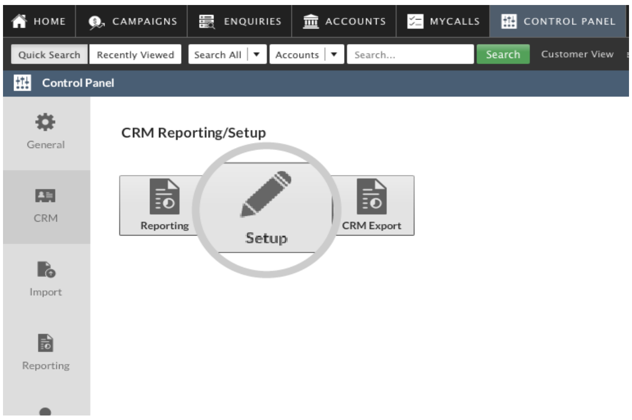
01 From the black navigation bar at the top of the screen, click **Control Panel**.



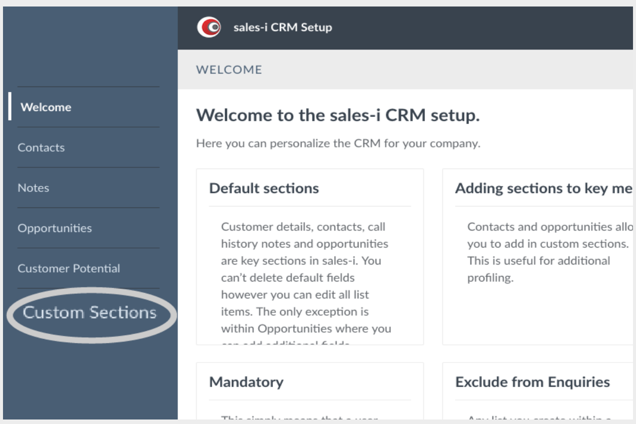
02 From the available options on the left hand side, click **CRM**.



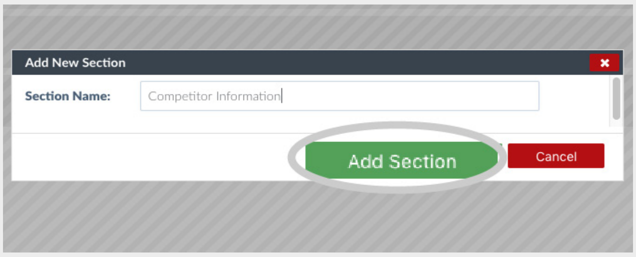
03 Next, Click **Setup**.



04 Click **Custom Sections** (left hand side of your screen).



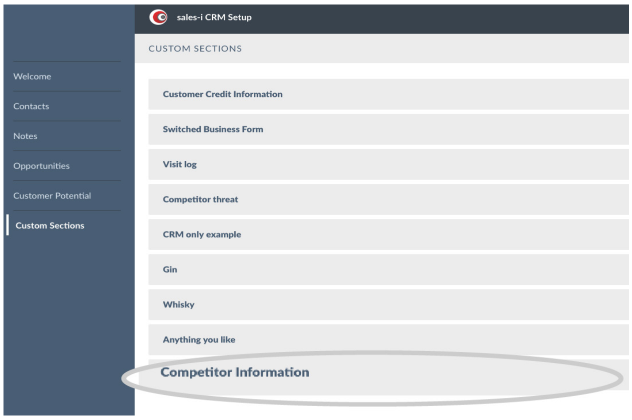
05 Click the **Add New Section** button in the top right hand corner.

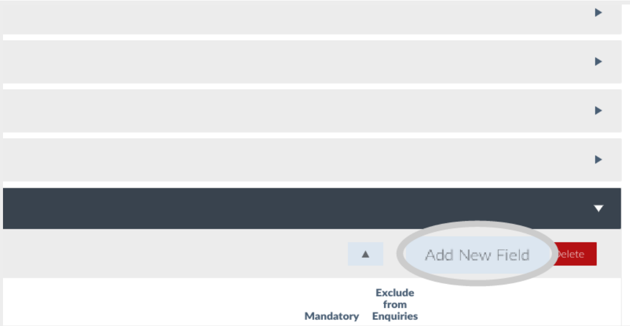


06 It's now time to type the name of your new section in the **Section Name** box and then click the green **Add Section** button.

For this example, we'll add a new section called Competitor Information.

07 This new section will now appear at the bottom of your custom section list. Click on it to expand.

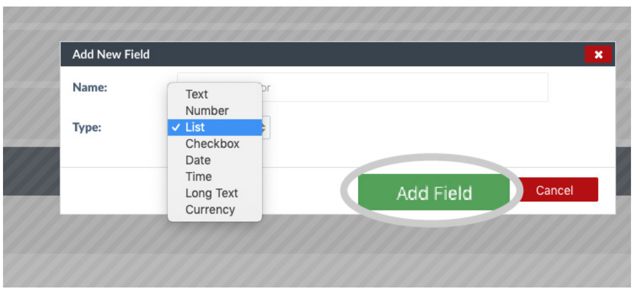




08 Next, click the **Add New Field** button (bottom right hand corner).

09 Type the name for your new field e.g **Main Competitor**.

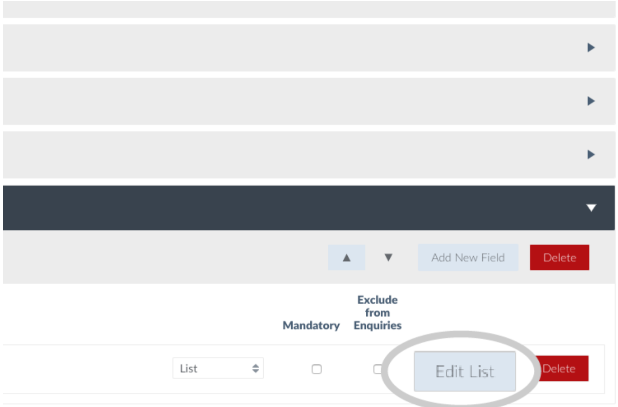
Next, select your type of field. (This is how your field will present to the person completing this section). E.g do you want the person completing this section to be able to tick it, choose from a number, select from a list or select a date etc? For this example we'll select **List**.

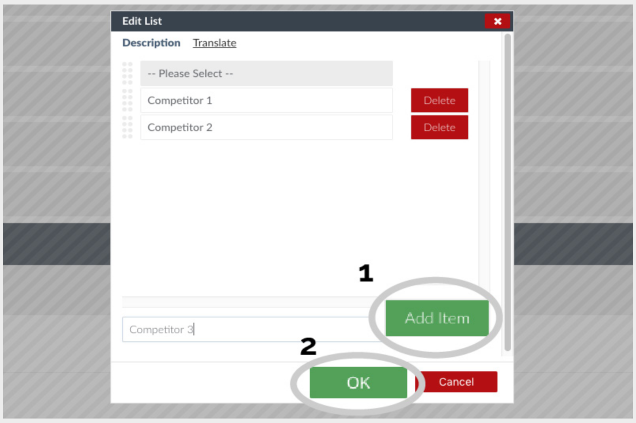


Once selected, click the green **Add Field** button.

Please Note: If you want to report on this segmentation field in enquiries, you must select **List**.

10 Next, click the **Edit List** button in the bottom right hand corner of the screen.





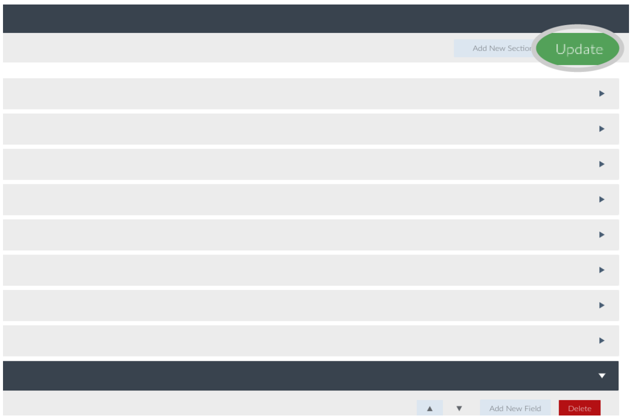
11 A pop-up box will now open. This is where you put in the names of your list options. These are the options that the user who inputs the data will be able to pick from.

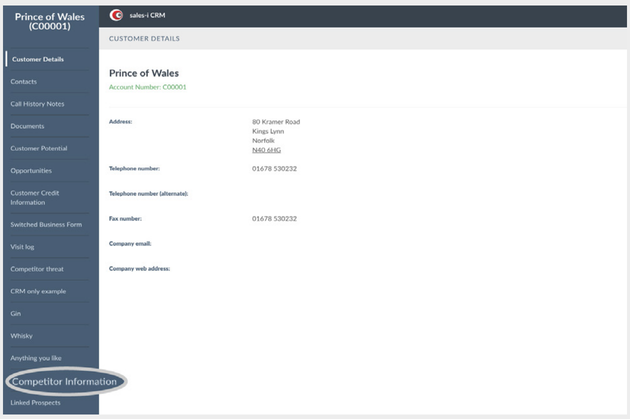
After each list entry click **Add item** and then once all list entries have been added click **OK**.

12 Next, click the green **Update** button in the top right hand corner.

Your list options are now set up.

Please Note: If you don't click the **Update** button all of your previous work will be lost.





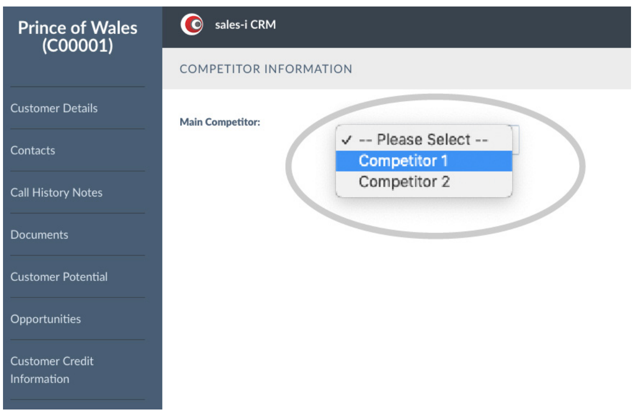
13 To add an account to a list, search for and select your account and then click on their **CRM**.

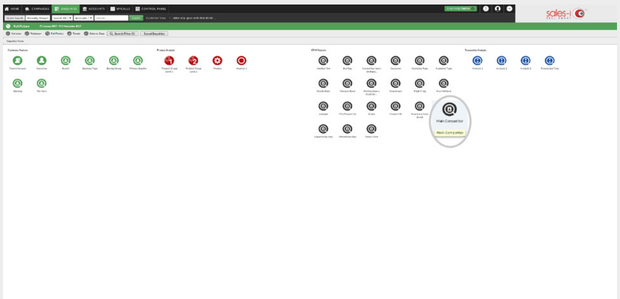
You will now see the title of your new custom section at the bottom left hand side. e.g. **Customer Information**. Click on it.

14 Now, select the relevant list option that applies to this customer.

For this example, we'll select **Competitior 2**.

Once you've made your changes, click the green **Update** button.



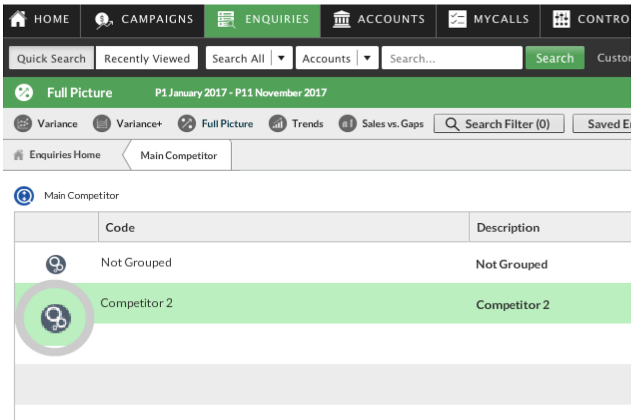


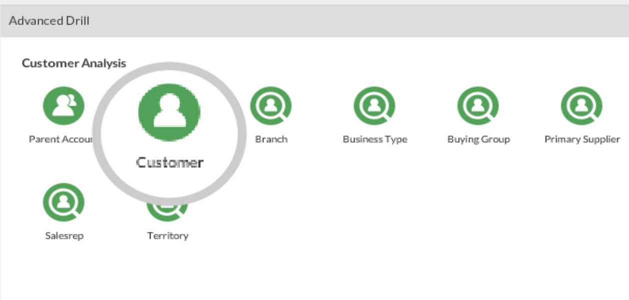
15 To view all accounts which fall under your new analysis field, select **Enquiries** and then click on the new black CRM Analysis bubble that you created.

For this example, we'll select **Main Competitor.**

16 Once you've clicked on the relevant bubble, click on the **cog icon** next to the list option that you want to see more information for.

For this example, we'll select **Competitior 2.**





17 Next, click **Customer.**

18 You will now see a list of all of the accounts that fall into your selected filter.

So, for this example, we now see which accounts have Competitor 2 listed as their main competitor.