

Navigating the Home Page

The Home page is designed as the access point to the central workspace within *WO CRM*. It is comprised of Dashlets that may be arranged and customized based on user preference.

					Welcome admin Logout My Account Admin About					
WO SALES	Home Accounts Opp	ortunities Inventory	Research	Analytics	Activities Otl	ner			Recent	R Find
						-	Create Contact	Add Dashlets	XA	ctions *
Shortcuts										
Create Contact	My Top Open Opportu	nities			Ø₿₽₩	My Open T	asks		0	XthS
Enter Business Card				M (1-3	of 126)			K4 4 (1-2	of 2)	DO
Create Advertiser	Onportunity Name		Advertiser ≙	Amount ≙	Close Date	Subject 🚔		art Date ≙ Due Date		
G Create Direct Advertiser	MA State Lottery	Hill Holliday	MA State Lottery	Anount 🗸		Fire Sale	Liter			
3 Create Lead	Merge Advertiser	Test	Merge Advertiser		0 9	one sheets	High	12/18/20	009 ×	신보
Screate Opportunity	Chase	The Think Tank	Chase			AE Budget	High	12/07/20	009 🗙	0 4
Schedule Meeting						Review	7.576.863	N1.002.01197	-1	
Co Schedule Call	My Contacts				ØQ⇔X	My Calls			0	C2 ↔ X
Create Task				ki (1 - 3	of 176) 🕨 🕨			He 4 12-2	of 8)	N
	Name 🕀	Office Phone Tra	iffic 😄 Email		Agency	Cubinet A	Du		A	
New Contact	Michael Billings	(212)555-9000	mbillings@	hillholiday.com	0 9	subject 👳	Du	11/30/2009	Accept?	1000
Save	Tricia Lowen	(415)555-6621	tlowen@ac	l.com	Ø₽	General Moto	rs Oh	15m 09:45am	Accepted	
First Name:	Andrea Dabbs	(214)555-7890	adabbs@n	ubin.com		My Montine			0	XteC5
				- K.S. 9999 - 512		wy weeting	5			
Last Name: *	My Agencies				Ø 63 ↔X				of 19)	
Office Phone:				M (0	- 0 of 0) 📐 🕅	Subject 🔤		Duration St	tart Date	8
	Agency 🖨		Phone 🖨 Direct	t	ed ⇔ Traffic ⇔	AE Budgets		0h45m 12	2/21/2009 9:45am	
Email:				e care croue						
Save										

Shortcuts Menu - Provides immediate access to the activities performed most often.

- Most of these options require minimal information which allows them to be entered both quickly and easily.
- A new contact may be created in the Shortcuts menu by either clicking **Create Contact** or by filling in the fields under New Contact on the left side of the screen.
- Note: The only field that is required to create a new contact is the Last Name, designated by the yellow field and 🗈 . Additional information may be added later as it becomes available.
- The Shortcuts menu may be collapsed by clicking on the arrow above the Shortcut menu options which provides more viewing real estate on the page.

Home Page Layout - The Home page contains a series of Dashlets which contain snippets of information provided throughout *WO CRM*.

- Simply drag and drop a Dashlet to the area on the home page where you would like it displayed.
- The information contained in **My Contacts**, **My Agencies** and **My Advertisers** is integrated with *WO Traffic*. As one of these pieces of data is created in *WO Traffic*, that information will autopopulate *WO CRM*.
- The information contained in **My Calls**, **My Meetings** and **My Contacts** is integrated with Outlook. Create items in *WO CRM* or Outlook and synchronize between the two.

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Dashlets – A new Dashlet may be created by clicking **Add Dashlets** at the top of the home page. This will open a menu of available Dashlets. Click on the Dashlet you wish to add and close the window.

There is additional functionality available within a Dashlet that may be accessed by clicking one of the four options on the top right-hand side of the Dashlet title bar.

My Agencies	∕ଢ଼÷×
	🕅 🚺 (1 - 3 of 274) 🕨 🗰
Agency 🔶	Phone \Leftrightarrow Direct \Leftrightarrow Email \Leftrightarrow
123 EZ Pawn	
128 Plumbing & Heating	

Edit 2 – Each Dashlet has several editing options available.

- Change the title of the Dashlet.
- Adjust the number of rows that are displayed.
- Display or hide additional columns of information.
- Filter the list to show only **My Items**, items created or modified on a certain date, and designate items that are specific to this particular dashlet.

My Top CRM Opport	unities : Options	×
General		
Title	My Top CRM Opportu	
Display Rows	5 💌	
Display Co	lumns Hide Columns	
 ID Name Advertiser Agency Amount 	 Stations AE Close Date Flight End Sales Stage 	
Filters		
My Items Only		
Date Created:	None	
Last Modified:	None	
Sales Stage	Avail Closed Lost Closed Won -	
AE	Administrator WO Migration Andrea VanWagner Andrea VanWagner Andy Garrison Ang Garrison Angela Nickerson	

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Refresh - The refresh icon allows you to refresh your screen to provide real time data updates by pulling the most recent activity directly from the server.

Export to Excel — This icon provides you with the option to export the Dashlet data into a excel file. This could prove useful if you wanted to export your Agency or Advertiser lists.

Delete – Clicking this icon will remove the Dashlet from your home page. If you would like to include the Dashlet after it has been deleted, simply click the **Add Dashlet** button at the top of the window.

My Top Open Opportunities ⊘ ℚ → X						
			🕅 🔄 (1 - 3 of 5) 🕨 🖬			
Opportunity Name \Leftrightarrow	Agency \Leftrightarrow	Advertiser \Leftrightarrow	Amount 🍦	Close Date $\ \Leftrightarrow$		
Samsun Electronics	Mindshare - Boston	Samsun Electronics	\$100,000.00	07/17/2009 12:00am	0 🖵	
<u>Golden</u>	Mullen	General Motors	\$97,000.00	07/11/2009 05:00pm	0 🖵	
Baystate Clinical Trials Inc.	Baystate Clinical Trials Inc.	Baystate Clinical Trials Inc.	\$50,000.00	07/26/2009 12:00am	0 🖵	

Information Advance - Use the arrows provided to scroll through the lists of information displayed in each Dashlet. Single arrows move one page forward or back, double arrows move to beginning/end of list. Hyperlinks - Each piece of data listed within a Dashlet is a hyperlink; clicking on a link or clicking the 🖃 icon allows you to drill down to view specific information related to it. The 🖄 icon allows you to edit the individual lines of data within a given Dashlet.

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