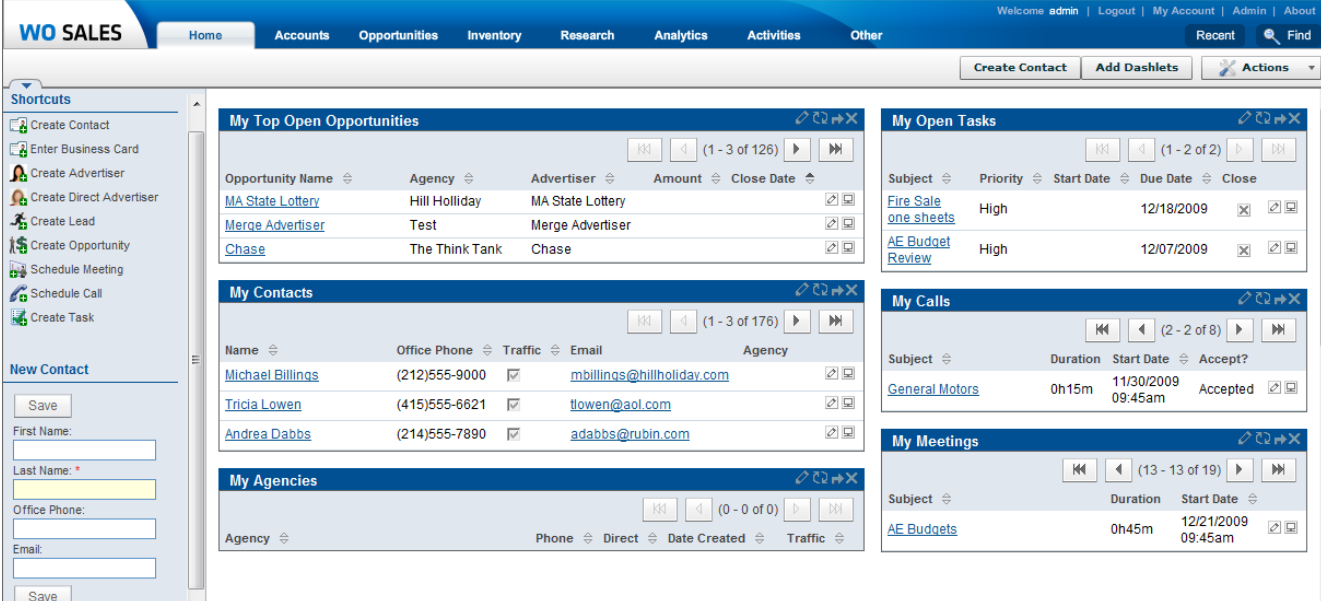


Navigating the Home Page


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.



The screenshot shows the WO CRM Home page with a navigation bar at the top containing links like Home, Accounts, Opportunities, Inventory, Research, Analytics, Activities, and Other. On the left is a 'Shortcuts' menu with options like 'Create Contact', 'Enter Business Card', etc. The main area contains several dashlets: 'My Top Open Opportunities' (table with columns: Opportunity Name, Agency, Advertiser, Amount, Close Date), 'My Open Tasks' (table with columns: Subject, Priority, Start Date, Due Date, Close), 'My Calls' (table with columns: Subject, Duration, Start Date, Accept?), 'My Meetings' (table with columns: Subject, Duration, Start Date), 'My Contacts' (table with columns: Name, Office Phone, Traffic, Email, Agency), and 'My Agencies' (table with columns: Agency, Phone, Direct, Date Created, Traffic). Each dashlet has a 'New' button and a 'Refresh' icon.

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.

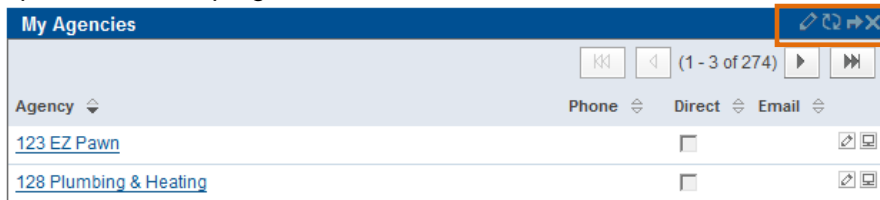
- The Shortcuts menu may be collapsed by clicking on the arrow above the Shortcut menu options which provides more viewing real estate on the page.


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 auto-populate *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.

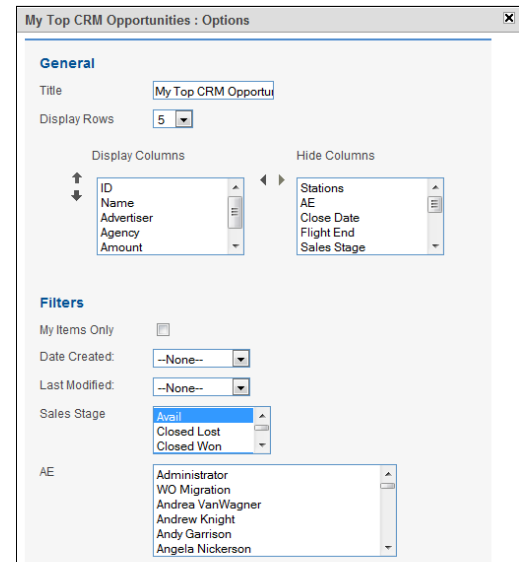
Dashlets – A new Dashlet may be created by clicking **Add Dashlets** at the top of the home page. This will open a menu of available Dashlets. Click on the Dashlet you wish to add and close the window.


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.




Edit  – Each Dashlet has several editing options available.

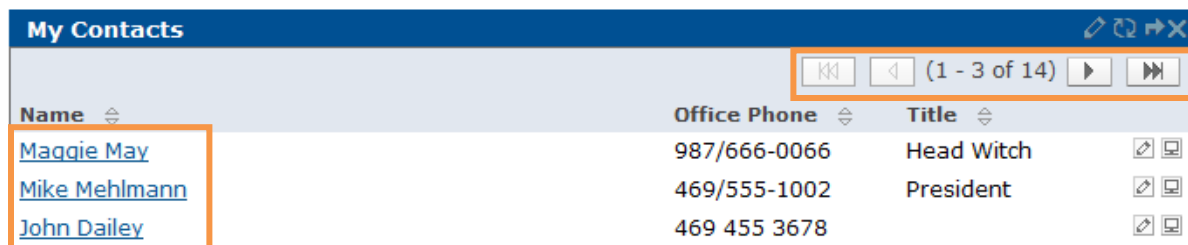
- Change the title of the Dashlet.
- Adjust the number of rows that are displayed.
- Display or hide additional columns of information.
- Filter the list to show only **My Items**, items created or modified on a certain date, and designate items that are specific to this particular dashlet.





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.



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.