

# **CRM User Training**

- 1. Be able to change your password through User Preferences.
- 2. Change home page to dashboard setting.
- 3. Customize your dashboard based on the default dashboard set up by the Overall Firm Administrator (OFA).
- 4. Know where and how to access all of the information you need in the Contact Manager.
- 5. Customize the grids in records, as well as the Contact and Opportunity grid.
- 6. Know how to access the support center and Cosential videos when you need assistance in the future.

# But Wait, There's More!

Cosential is web-based, you are going to have access wherever you have an internet connection. So if you're at home or away from the office, or on a jobsite, you can access Cosential. You don't have to login with a VPN in order to access the system.

There is also a mobile app that will give you access to view a lot of these record types that we'll review today. Please download the app from your app store after the training so you can see how the information looks when you view it from your phone.



### **User Preferences**



- 1. Change Password Click this link and you can change your password.
- 2. Home Page Preference Click this link to change your home page to a dashboard setting.
- **3. Opportunity Preference** Click this link so you can assign your self a default role on every opportunity you enter



### **Project Lifecycle and Table Relationships in Cosential**



#### **Table Relationships**



#### **Contact Manager >> Company Grid**

Enterprise e & Lime Co., Inc.				_	
C	Contact Manager [Advanced Search] 🔯 [Contact Manag	er Administration]		Event Manager   Call Lo	Company Contact   Opportunity
We	elcome to the Cosential Contact Manager.				
Cre	eate, store, and find company and individual contacts.				
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	David H Martin			Contractor Pricebook Test	
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In the Company Grid, you can change the display so you see more or less records, search for companies based on the company type, and search for companies based on the first letter of the company name.



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- 1. You can export a page or the entire list of contacts from the grid.
- 2. If you click on the large portion of this button, you will be able to apply different filters to the contacts in the system.
- 3. If you click on the smaller part of this button, you can make sure that you're viewing only your contacts or all of the contacts in Cosential. It will always default to your contacts.



# **Contact Manager >> Opportunity Grid**

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- 1. You can export a page or the entire opportunity list from the grid.
- 2. If you click "Filter," you will be able to filter all of the opportunities in the system. Make sure "All Staff" is selected if you want to see all of the opportunities in the system.



### **Contact Manager >> Activities**

-	Search companies, contacts, leads, opportunities, projects and	personnel - Q	Need help?
🖶 Home	Contact Manager [Advanced Search] 😺 [Contact Manager Administ	tration]	Event Manage   Call Log   ompany   Contact   Opportunity   Lead
Activities	Welcome to the Cosential Contact Manager. Create, store, and find company and individual contacts.		
	The list below are the last records you have clicked		
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Contact Manager	Your Last 8 Companies viewed	Your Last 4 Contacts viewed	Your Last 9 Opportunities viewed
🖸 Email	Anastasi Trucking & Paving	English, Bill	Big Box - Chambersburg
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Projects			

New Call Log		×
3 Caller:	Jim Zimmerman (Personnel)	
Attendee:		
Call Date:	02/20/2019 🖸 11:15 PM 💌 Set	•
Status:	Completed	•
Call Type:	Select	~
Call Disposition:		•
Association:		
Subject:		
Comments:	Tahoma ▼   B I U   A A   A • * * = ≡ ≡   @	1
		_
Notify:		
Notity.		
Followup Call:	call date 🔹 12:00 AM 💌 Set	• •
Save and Close -	Cancel	

- You can access Activities (Call Logs) by clicking "Call Log" in the top right navigation of the Contact Manager
- 2. You can also access Activities from your modules on the left.
- "Call Logs" are a customer touch and can be used to document meetings, phone calls, or text messages.



### **Accessing the Support Center**





### Home Page >> Customizing Dashboard Widgets





