



CRM User Training



CRM User Training Goals

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

The screenshot shows the NESL Dashboard interface. At the top, there is a search bar and a user profile dropdown menu for Jim Zimmerman. The dashboard is divided into several sections: 'Opportunity Pipeline' (a funnel chart showing stages from 02-Prospecting to 09-Lost), 'Opportunity Counts' (a line chart showing created opportunities over time), and 'Opportunity Financial Summary' (displaying Projects Awarded YTD: 0 (\$0) and Hit Ratio by Count: 0% (0 won : 0 lost)). A user profile dropdown menu is open, showing options like 'Personnel Record', 'My Preferences' (highlighted with a red box), and 'Logout'.

The screenshot shows the 'My Preferences' page. It features a sidebar with navigation options and a main content area titled 'My Preferences'. The page is divided into sections: 'Personal', 'Contact Manager', and 'Opportunity Preference'. The 'Personal' section includes links for 'Change Password', 'Home Page Preference', 'Set Auto Login Preferences', and 'Set Your Default Country'. The 'Contact Manager' section includes links for 'Company View Preferences' and 'Customize Sync Preferences'. The 'Opportunity Preference' section includes a link for 'Opportunity Preference'. The links 'Change Password', 'Home Page Preference', and 'Opportunity Preference' are highlighted with red boxes and numbered 1, 2, and 3 respectively.

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

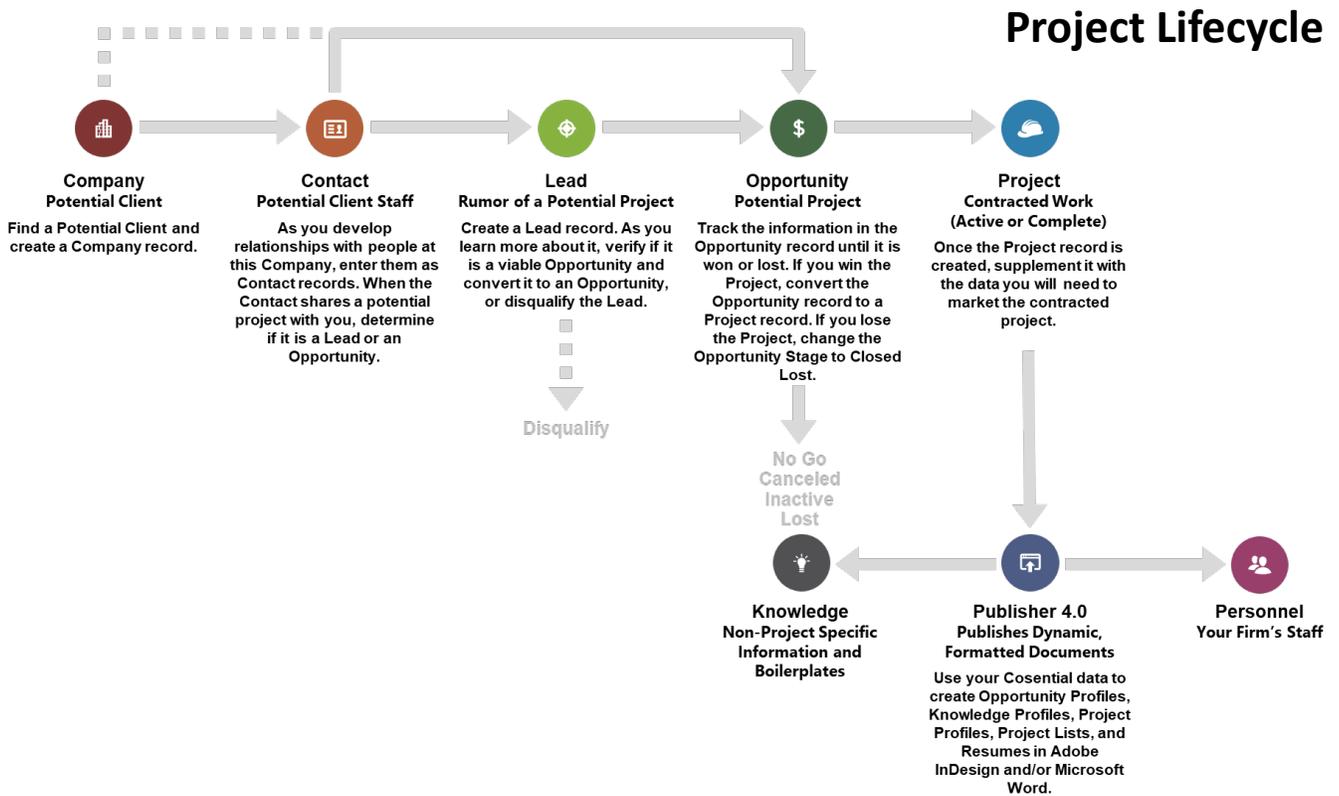
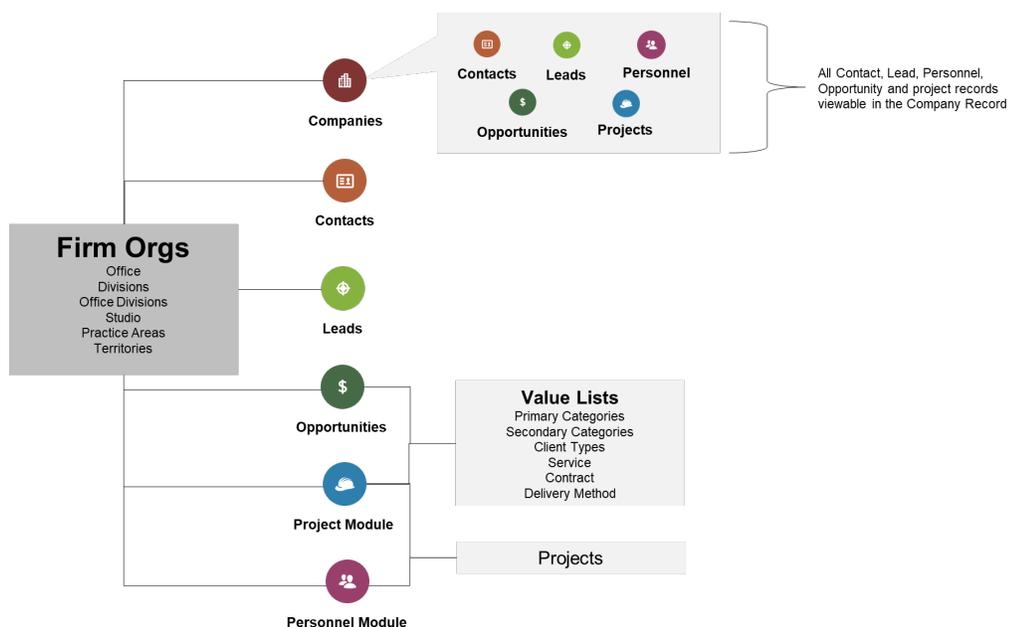


Table Relationships



Contact Manager >> Company Grid

The screenshot shows the top navigation bar with a search field and a 'Need help?' button. The left sidebar contains a menu with 'Contact Manager' highlighted. The main content area displays a welcome message and three summary cards: 'Your Last 8 Companies viewed', 'Your Last 4 Contacts viewed', and 'Your Last 9 Opportunities viewed'.

The screenshot shows the 'Company Grid' interface. The 'Advanced Search' link in the top navigation bar is highlighted. Below the grid, a 'Search for a Company' modal is open, showing search criteria like Company Name, Company Type, and Account Approval Status. The grid lists various companies with their names, acronyms, locations, phone numbers, and websites.

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.

Contact Manager >> Contact Grid

Search companies, contacts, leads, opportunities, projects and personnel

Need help?

Contact Manager [Advanced Search] [Contact Manager Administration] | Event Manager | Call Log | Company | **Contact** | Opportunity | Lead

Contacts

Refresh Export Page Export All All Active search contacts 60 zip radius search New Contact New Company

Full Name	Company Name	Parent Company Name	Title	E-mail Address	Company Address	Business Address
Smith, Joe	TestCompany			joe@testcompany.com	123 Elm Street Tampa, FL 33607 United States	123 Elm Street Tampa, FL United States
Darlock, Joe	Damiani Concrete				5503 Martha's Vineyard Clarence Center, NY 14032 United States	
Castercone, Alki			Owner	kingkongell@gmail.com	295 Main St Suite 801 Buffalo, NY 14203 United States	
HONECK, MICK				mickhoneck@gmail.com	10 Katherine Street Buffalo, NY 14210	10 Katherine Street Buffalo, NY 14210
O'Connell, Bryan				BDOSTIMM@aol.com	10 Katherine Street Buffalo, NY 14210	
Celik, Tom			Estimator / Project ...	tom@visoneco.com	10151 Main St Clarence, NY United States	10151 Main St Clarence, NY United States
Visone, Lucian			Owner	lou@visoneco.com	10151 Main St Clarence, NY United States	10151 Main St Clarence, NY United States
Visone, Kyle				kyle@visoneco.com	10151 Main St Clarence, NY United States	

Contacts

Refresh Export Page Export All All Active search contacts 60 zip radius search New Contact New Company

filter by Personnel Include Deleted Contacts Include Inactive Contacts Key Contact Only filter by City

filter by State filter by Country filter by Mailing Lists filter by Adv. Mailing List

filter by Mailing Status filter by Locations/Plants filter by Product Lines filter by Job Types

Apply Cancel Save As Reset

Full Name	Company Name	Parent Company Name	Title	E-mail Address	Company Address	Business Address
Smith, Joe	TestCompany			joe@testcompany.com	123 Elm Street Tampa, FL 33607 United States	123 Elm Street Tampa, FL United States
Darlock, Joe	Damiani Concrete				5503 Martha's Vineyard Clarence Center, NY 14032	

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

Search companies, contacts, leads, opportunities, projects and personnel

Need help?

Contact Manager [Advanced Search] [Contact Manager Administration] | Event Manager | Call Log | Company | Contact **Opportunity** Lead

9 Opportunities

Export Filters

Opp Number	Opportunity Name	Client	Stage	Days in Stage	Next Action	City	State	County
Stage: 02-Prospecting (Converted Lead) (1 Opportunity)								
19-0002	Big Box - Chambersburg	James C Zimmerma...	02-Prospecting (Con...	12	set meeting	Chambersburg	PA	
Stage: 04-Preparation (4 Opportunities)								
18-0002	I-78 Project Road Widening Project fr...	H&K Group	04-Preparation	63			PA	
18-0002-A	I-78 Project (Ready Mix)	H&K Group	04-Preparation	63			PA	
18-0002-B	I-78 Project (Regate)	H&K Group	04-Preparation	63			PA	
19-0001	Book Test	TestCompany	04-Preparation	42				
Stage: 08-Won (3 Opportunities)								
18-0001		TestCompany	08-Won	69		Tampa	FL	Hillsboroug
18-000		TestCompany	08-Won	69				
18-000		TestCompany	08-Won	69				
Stage: 09-Lost (1 Opportunity)								
18-0		TestCompany	09-Lost	69				

9 Opportunities

Export Filters

Filters and Settings

All Locations/Plants All Product Lines All Job Types All Market + Sector

All Staff Status: Open Any Sales Cycle Show Master/Sub Opportunit... All Stages 25 records per page

All Staff Roles All Primary Categories All Secondary Categories

Created any time Last modified any time Created or Modified any time

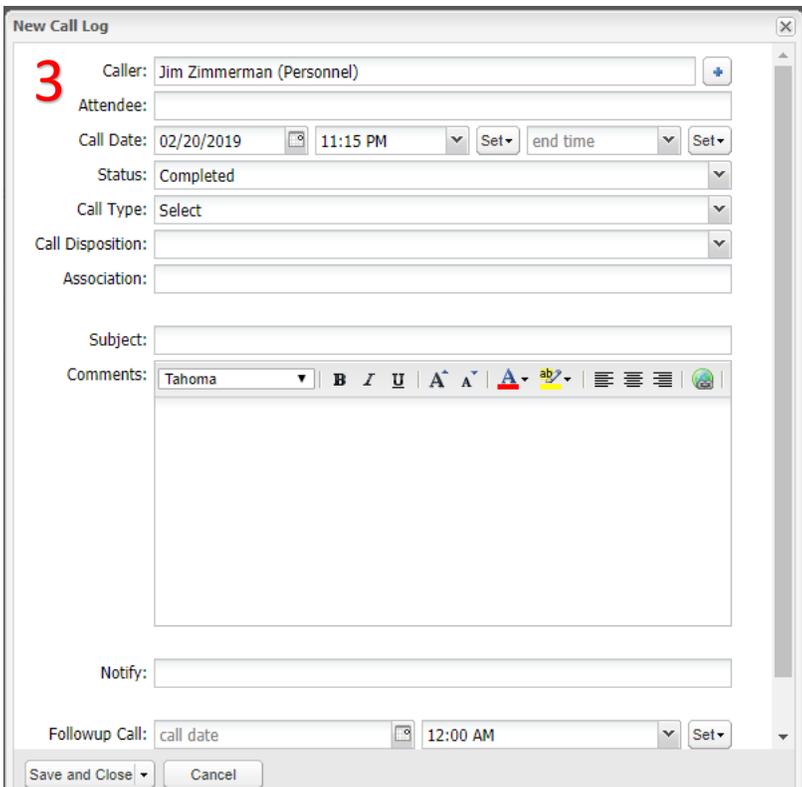
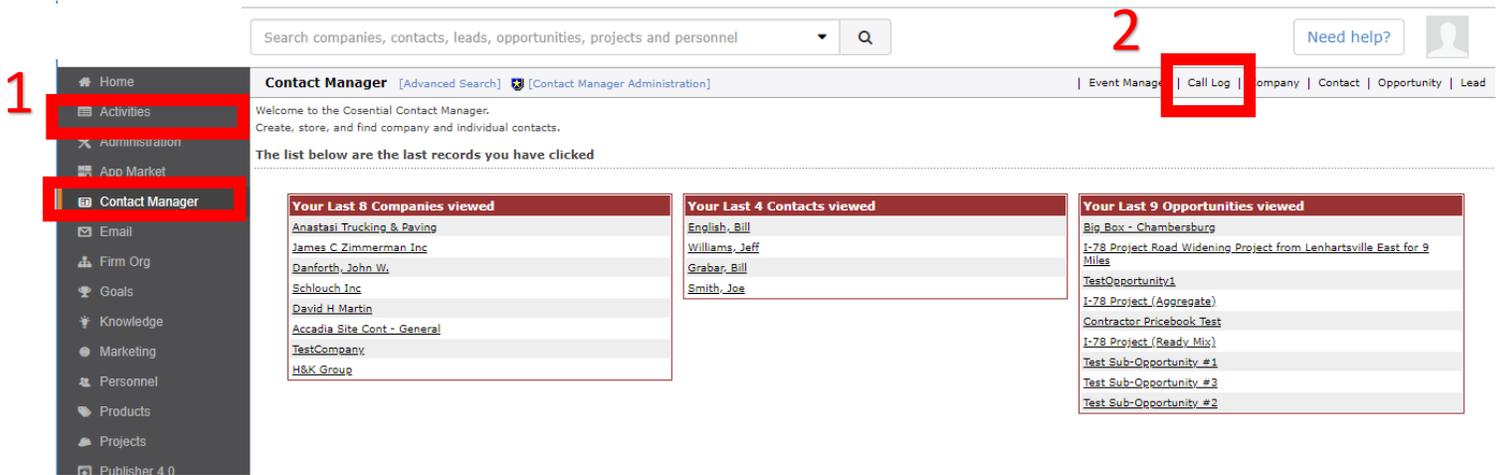
Search: Search within filtered results

Apply Filters Save Filters Reset Filters

Opp Number	Opportunity Name	Client	Stage	Days in Stage	Next Action	City	State	County
Stage: 02-Prospecting (Converted Lead) (1 Opportunity)								
19-0002	Big Box - Chambersburg	James C Zimmerma...	02-Prospecting (Con...	12	set meeting	Chambersburg	PA	
Stage: 04-Preparation (4 Opportunities)								
18-0002	I-78 Project Road Widening Project fr...	H&K Group	04-Preparation	63			PA	
18-0002-A	I-78 Project (Ready Mix)	H&K Group	04-Preparation	63			PA	

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



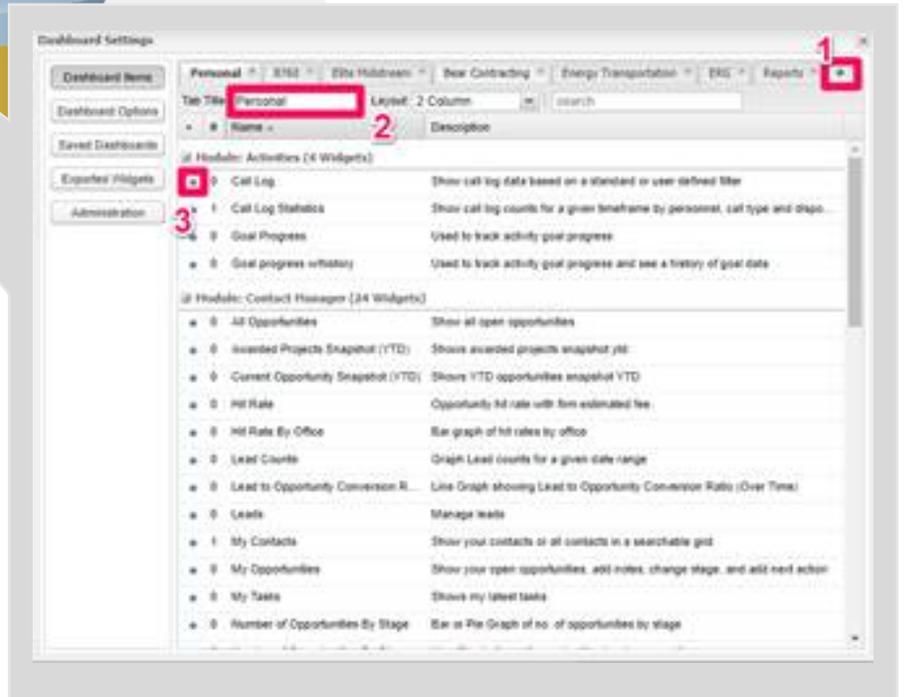
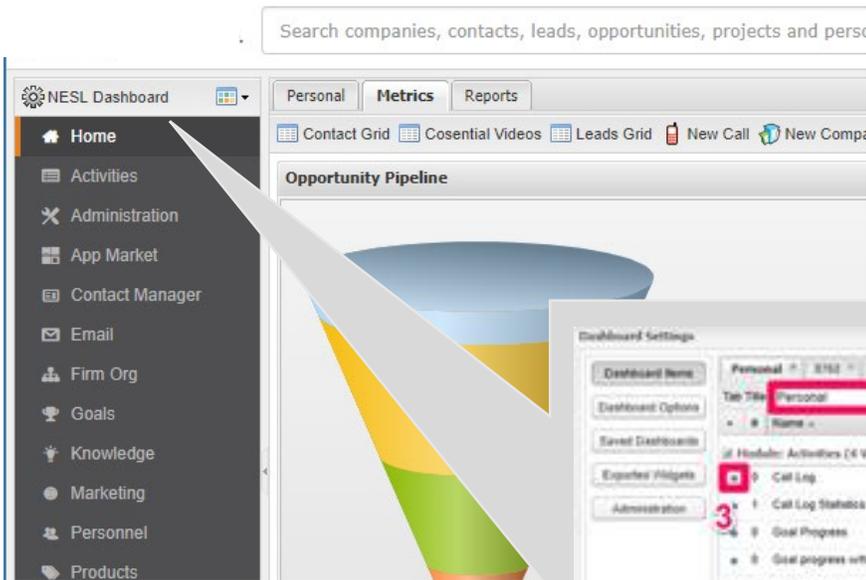
1. You can access Activities (Call Logs) by clicking “Call Log” in the top right navigation of the Contact Manager
2. You can also access Activities from your modules on the left.
3. “Call Logs” are a customer touch and can be used to document meetings, phone calls, or text messages.

Accessing the Support Center

The screenshot shows the NESL Dashboard interface. At the top, there is a search bar for companies, contacts, leads, opportunities, projects, and personnel. Below the search bar, the dashboard is divided into several sections: Personal, Metrics, and Reports. The Opportunity Pipeline section features a funnel chart with stages: 02-Prospecting (Converted Lead) (\$5.00 M), 04-Preparation (\$0.00 M), 08-Won (\$0.00 M), and 09-Lost (\$0.00 M). The Opportunity Counts section displays a line graph titled "Created Opportunities from Feb '18 to Feb '19" showing a peak in December. The Opportunity Financial Summary section provides key metrics: Projects Awarded YTD: 0 (\$0), Hit Ratio by Count: 0% (0 won : 0 lost), Hit Ratio by Volume: (\$0 won : \$0 lost), Pipeline Size: 9 (\$0), and Opportunities created in the last 60 days: 2 (\$0). The Support Center is highlighted in the left-hand navigation menu.

The screenshot shows the COSENTIAL Support Center website. The header includes the COSENTIAL logo, a search bar, and a user profile for Jim Zimmerman. The main heading is "How can we help?" with a search bar below it. The page content includes a call to action: "We're here to ensure your success!" with contact information: "Give us a call at 1-800-606-7080", "Sign up for our Webinars", and "Check out our Client Beginner Roundtables." Below this is a section for "Register to attend the Cosential User Conference" featuring a "BUILT 2 WIN" event poster. The "Search by category:" section lists five categories: GETTING STARTED, TUTORIALS & WEBINARS, PRODUCT UPDATES, GENERAL USERS, and OPA & ADMINISTRATORS. The "Promoted articles" section lists two articles: "Cosential for Outlook (CFO) - (video)" and "How-To: Create a Mailing List or Manage a Mailing List". The "Community" section at the bottom invites users to "Join the conversation".

Home Page >> Customizing Dashboard Widgets



1. Add tabs to your dashboard
2. Rename the tabs
3. Add widgets to that tab.

