

Main Preview Window: Knowing your way around .

For version 8.0.29

Do you know your Mantaray well enough to use it without losing your time? If not, wouldn't you like to?

Being successful means learning things and having experience in using your knowledge right. So, I will try to cover that “learning things” part and it will be only up to you then to experience that knowledge.

That is why I started to work on a new series of newsletters for you, so that you learn things right about your Mantaray application.

*I called this new series of newsletters “**HOW TO**”, because that's probably the most frequently appearing question in your head when using Mantaray. But there is not always time to ask your CRM provider, right? That's ok. I'm here for that.*

I'm going to start with the first thing you see when you open your Mantaray application, the Main Preview Window.

There are so many elements in the MPW that it seems difficult to stay focused on the things you actually opened Mantaray for.

So I thought it would be great to show you the way to the most used and requested features of the MPW.

The Design of the MPW has been drastically changed since its first version due to our client's requests and the upgrade of functionalities. Now the MPW serves us to have an overview of our work processes, to have a notion of what you need to do and what is already done when opening your CRM. Surely the MPW will suffer even more changes in the future in order to make it more simple and compact. Because we never stop with making Mantaray better.

But to learn the possibilities of your Mantaray application, requires your time already now. Because you need to be productive already now.

So, let's start!

MPW : Knowing your way around .

The things you need to know about the MPW:

Widgets: What type of widgets do you have? How to remove or add the new ones into your MPW?

My Home: What it actually does? How can it help you in winning the time?

The Right Pane: The notifications from your Mantaray about the work to be done.

The Left Pane: Your database elements

Clearing up some space and making your Mantaray look simple (customization of the Main screen).

The screenshot displays the Mantaray V8 software interface. The top menu bar includes 'Quick Tools', 'File', 'Home', 'Organizer', 'Office Tools', 'Commercial', 'Projects', 'HR', and 'Invoicing'. Below the menu is a toolbar with icons for 'Tasks', 'Relations', 'Registration', 'Task Dashboard', '360° View', 'Timesheet', 'Browse Customers', 'Suppliers', 'Banks', 'Products', 'Employees', 'Teams', 'Groups', 'Resources', 'E-mails', 'Notes', 'Agenda', 'Calls', 'Visitors', 'Manager Dashboard', 'Documents', and 'Browse Contacts'. The main workspace is divided into several sections:

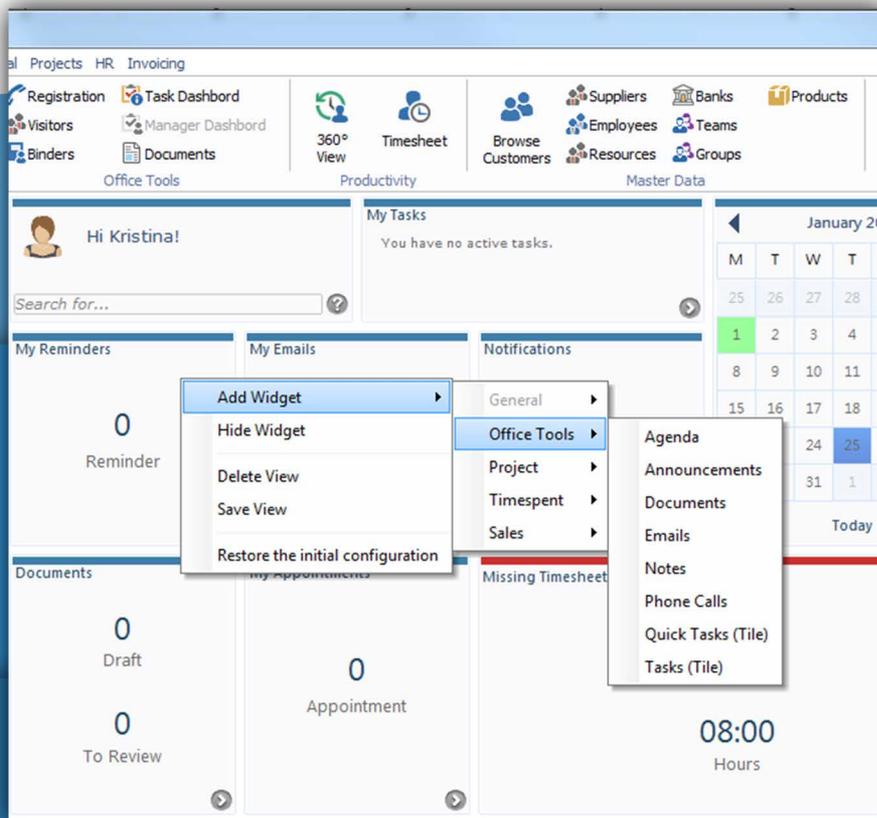
- Left Pane:** A navigation tree with categories like 'Last 10', 'Companies', 'Contacts', 'My Department', 'My Clients', 'My Tasks', 'My Projects', 'My Reports', 'Reports and Queries', 'My Contact Persons', 'Environments', and 'Master Data'.
- Top Center:** A personalized greeting 'Hi Kristina!' and a 'My Tasks' widget showing 'You have no active tasks.' with a search bar.
- Calendar:** A calendar for January 2018 with the 25th highlighted as 'Today'.
- Widgets:** Several data widgets showing counts: 'My Reminders' (0), 'My Emails' (0), 'Notifications' (0), 'Documents' (0), 'My Appointments' (0), 'Missing Timesheets Today' (1 Day), 'My CSR's' (0), and 'My Projects Tasks' (0 New, 0 In Progress, 0 Late).
- Right Pane:** A list of 'My CSR's' with a 'By Status' filter showing '1 - New' and '6 - Closed' items, and a 'Project Tasks' section with 'Late Finish', 'Late Start', and 'Development' categories.
- Bottom:** A 'Task Breakdown' table with columns: Collected, Chargeable, As % of TH, Planned, Non-Chargeable, Total.

The status bar at the bottom shows 'User: kshatokhina', 'Connected to: Mantaray Software', 'Version: 8.0.28.0', and 'Ready...'.

MPW : Knowing your way around .

Widgets :

First of all, you can always choose to delete or add any widget into your MPW just by right-clicking in the widget area and selecting the necessary function from the context menu.



The range of the widgets is quite big:

Times spent

Sales (Dashboard)

My Emails

Notifications

Interactive Calendar

My Documents

Search

My Tasks

My Reminders

My Appointments

My Notes

Paid / Unpaid Invoices

Project Plans

Matters and many more

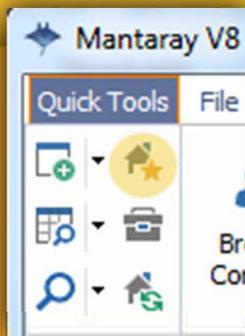
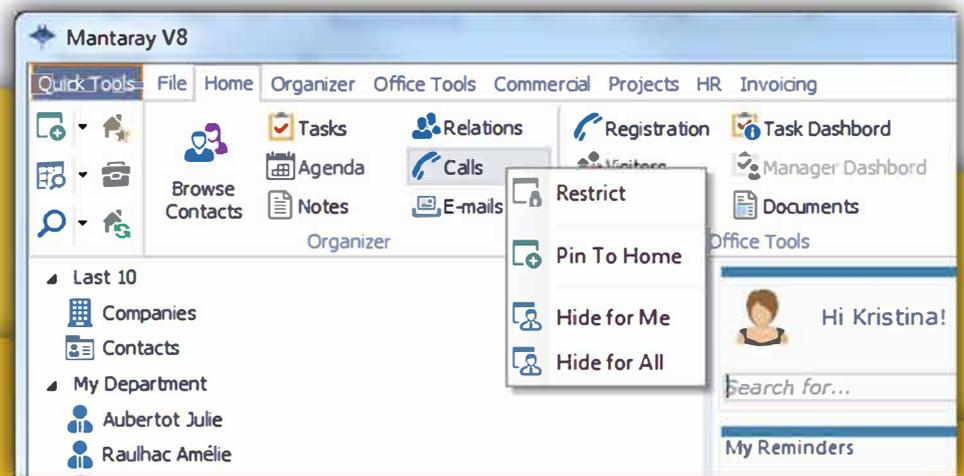
The main idea of the widget is to show us the most recent information about our work processes. To keep us informed, updated and miss no single detail. The size of the widgets is adjustable, as well as you can simply drag the widget to move it to another spot.

MPW : Knowing your way around .

My Home:

My Home is some sort of Mantaray mode, which will display only the windows and tools you will preselect, except for the default ones. This is the way to have a compact and easy way to use Mantaray application.

To preselect the windows and compose **My Home**, just right-click on the programs in the menu that you would like to add, and select **“Pin to Home”** option from the popup menu.



When you are finished composing **My Home**, switch the Menu mode by simply clicking on that little icon in the upper left corner and enjoy your **simplified CRM!**

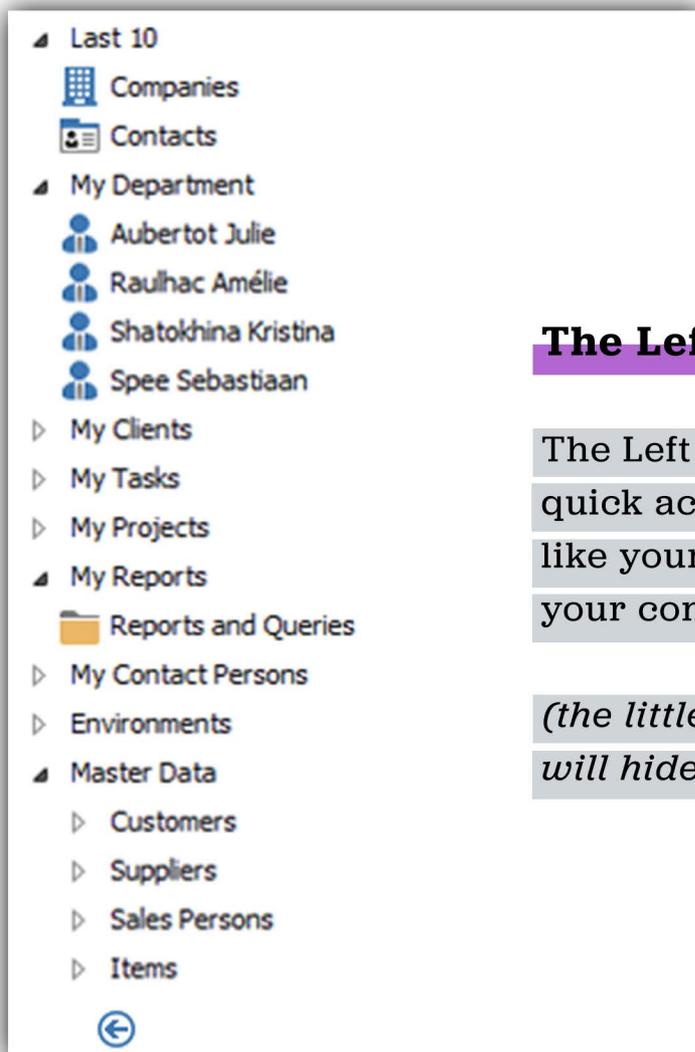
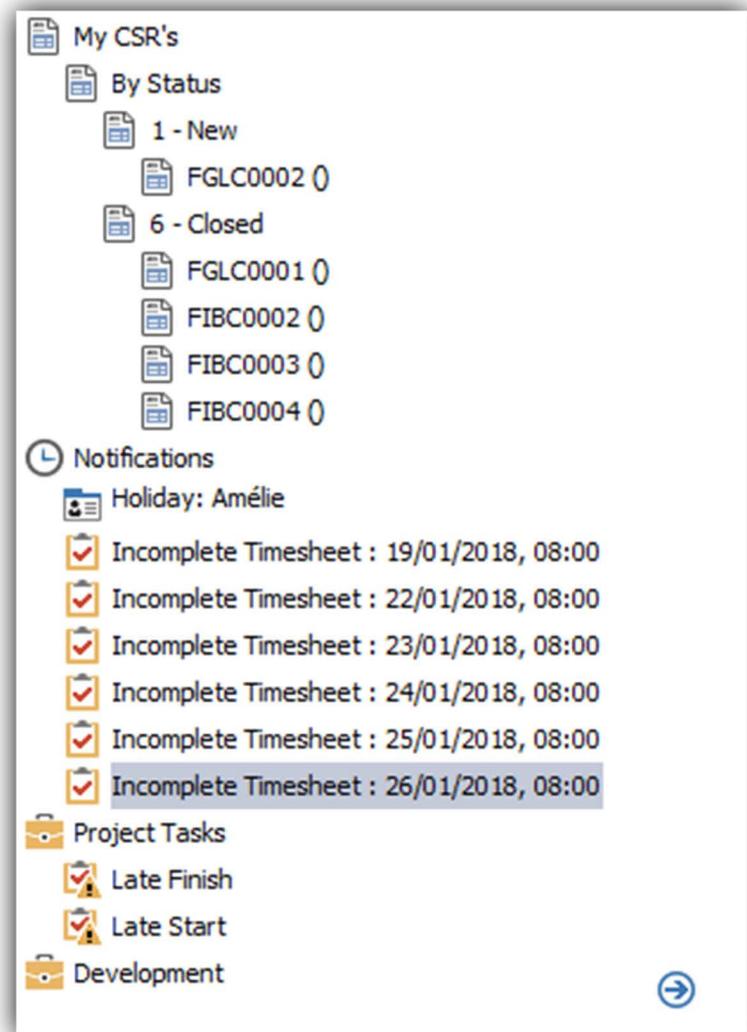
There will be no more time wasted on searching the correct windows along your Mantaray!

(If you would like to review **“My Home” Newsletter** that was published in August, click **HERE**)

The Right Pane:

The Right Pane serves you to show all the critical information about your work: the notifications, reminders, emails to respond, timesheets to complete, projects to follow up - all that sort of data you can't let yourself to forget about.

(a little arrow in the lower corner will hide or show the pane back)



The Left Pane:

The Left Pane allows you to have a quick access to your critical data, like your clients, your department, your contacts, projects, tasks, etc.

(the little arrow in the lower corner will hide or show the pane back)



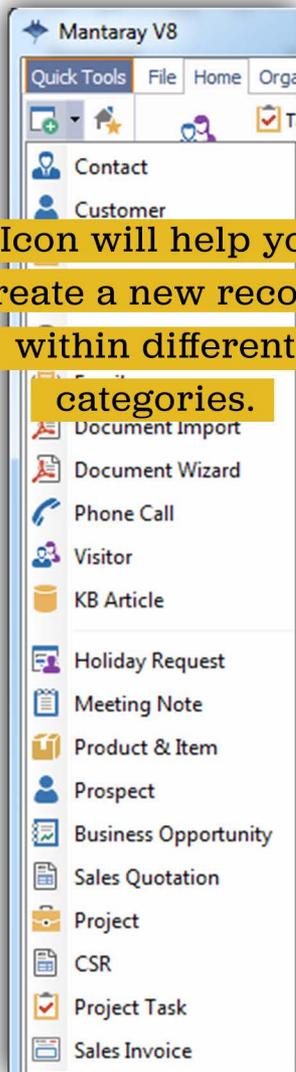
MPW : Knowing your way around .

How can you customize your MPW?

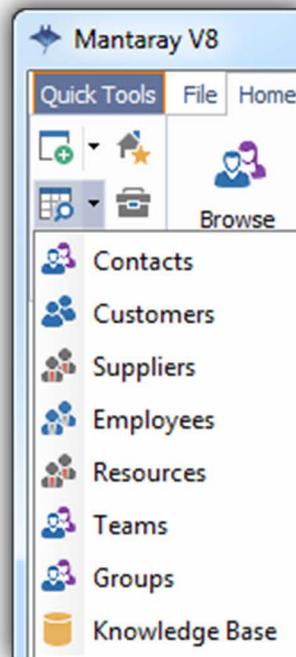
The set of “**Quick Tools**” icons in the upper left corner can give you some help in customization your Mantaray application.



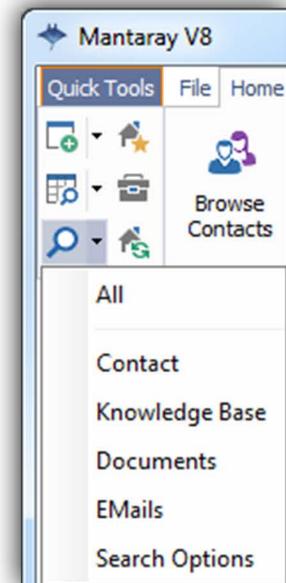
1 . Icon will help you to create a new record within different categories.



2 . This icon will allow you to browse the data within the certain categories.



3 . This icon will allow you to search the data within the certain categories.



Clicking on the icon will open the search bar in the center of the MPW.
If you select Contact category, it will open the Contact data table for you in the middle of the MPW.

4 . This icon enables the Drag-and-Drop Tool Box that works as a mini independent CRM version.



I already talked about this feature in our last **“Tips and Tricks” Newsletter**, which you can always download from our website. As you could notice, The Tool Box always stays on top of any window, so it's easy to drag and drop the files to save them. The Tool Box runs all the essential features of the CRM. Timesheets, search function, creating and browsing the records. It also has **“My Apps”** function which will contain all the windows you add to **“My Home”** !

*This is practically all about the **Main Preview Window**, hope it was useful for you. If you have any suggestions about other topics, please let me know, **send me an email or give a call.***

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