

# TIPS AND TRICKS

NOVEMBER 2017

## DRAG AND DROP TOOL BOX

A TOOL ALLOWING YOU TO SHUT DOWN THE CRM APPLICATION ITSELF AND HAVE AN ACCESS TO THE MOST IMPORTANT FEATURES RUNNING ON THE BACKGROUND.

Another handy tool that Mantaray offers you, is our Drag and Drop Tool Box.

Yes, in fact it's the whole box of tools, but there are not too many, so it's not going to be overwhelming for you.

### So, why would you need it?

This is a tool for those who don't use all Mantaray functions at once. It runs independently from Mantaray, which means, you can shut down your CRM application, but the tool will continue running on the background.

*"THE TOOL WILL RESPOND TO YOUR MOST ESSENTIAL CRM NEEDS AND GIVE YOU AN ACCESS TO: SEARCH WITHIN YOUR DATABASE ; TIMER FOR YOUR TIMESHEETS ; CREATING NEW RECORDS ; BROWSE OF THE MOST IMPORTANT DATA ; ADDING NEW DOCUMENTS INTO DATABASE "*

## HOW TO ACTIVATE AND USE IT



ACTIVATE IT BY CLICKING ON THE ICON AT THE TOP LEFT CORNER OF THE MAIN PREVIEW PANEL



## THE DRAG AND DROP TOOL BOX WILL APPEAR



IN ORDER TO ADD A DOCUMENT TO MANTARAY, JUST DRAG AND DROP A SELECTED DOCUMENT INTO A **WHITE SQUARE AREA** AND IT WILL BE SAVED. YOU CAN DO THE SAME WITH THE DATA FROM OUTLOOK LIKE CONTACT, TASKS, EMAILS AND APPOINTMENTS.



TO SEE WHAT KIND OF RECORDS YOU CAN CREATE, CLICK ON "NEW" BUTTON.



FOR A SPECIFIC DATA BROWSE, CLICK ON "BROWSE" BUTTON.

SO, IT'S QUITE A BIG RANGE OF FUNCTIONS YOU CAN USE WITHOUT EVEN RUNNING MANTARAY APPLICATION ON THE BACKGROUND.

WATCH OUR TUTORIAL ON YOUTUBE

