Administration Overview

Portals have advanced tools for site administrators to manage users, members, catalogs, prospects and run reports. A simple CRM system is easily set up and customized to hold data to be used in segmenting messages, custom dashboards, and running reports.

Catalogs
The catalog database is setup with custom data fields divided into sections and has catalog administrators and contacts. Add notes about the catalog or its users and create tasks. Add billing data if you will charge an organization for their catalog.

Members
The member database is setup with custom data fields divided into sections. Create and manage member types & groups, add or upload members, and manage adding files to member dashboards.

Contacts & Users
The contact & user database is setup with custom data fields divided into sections. Add users to manage catalogs or the site and add contacts to be associated with a catalog record.

Prospects
The prospect database is setup with custom data fields divided into sections. Add or upload prospects and set up a transfer process to distribute prospects as sales leads.

Reports
Reports analyze activity on the portal or pull data from the member, catalog or user databases. Portals come with standard reports that can be customized and saved.