

Spots

This module allows you to quickly present these systems in the form of summary tables or graphs.

Create a Spot

1. In the module menu, select **Create bulletin**.
2. Fill out the basic information:

Spots: The name of the Spot being created.

Scope of analysis:

Select the data area on which the summary will be based. The proposed list items can be presented as a specific module (for example, Preliminary contacts), or at once by several modules (for example, Events presented by Calls, Meetings and Tasks) and allow you to compile quite complex summary Spots.

Configuration:

It is represented by two combo boxes and data fields. In the first combo box, you can choose how to present data in the form of various types of tables or charts. In the second combo box, a function is selected that determines how exactly the selected data will be processed. The list of available fields depends on the selected area of analysis. By moving data fields in the information area of the summary, you can specify which data will be presented in rows and columns of the pivot table (or on the x-axis and ordinate, if the data are presented as a cumulative graph).

Example:

Suppose you need to view a summary of all contractors entered into the system, taking into account their types and countries of location. For this:

- In the analysis area, select **Companies**.
- In the configuration, select the field **Company type** and move it to the header of the future table.
- In the configuration, select the **Country** field and move it to the left of the first column of the future table.
- In the first combo box, specify the method of data presentation, for example, the heat map.
- In the second combo box, select the function **Quantity**.

[image.png](#)

The same data can be presented in the form of a graph; the same summary is shown in the form of a histogram with accumulation:

Displaying Dashboard Spots

As well as Spots, Spots can be displayed on the main page in the corresponding dashlet.

The following options are available when configuring the Summary dashlet:

- **Title:** You can enter your dashlet title or leave the default one. Summary: Select the Summary that will be displayed in the dashlet.
- **Custom Summary:** Specify this option if you want to modify the Summary parameters directly from the dashlet.

List View Actions

You can access Spots module from 2nd side navbar.

- **Create Spot:** Enables users to add new spots with relevant details to the system.
- **View Spots:** Allows users to browse and review existing spots and their information.
- **Filters, Column Chooser, Favorites** functionalities similar to other modules. Refer Leads module.
- To sort records on the Payments List View, click any column title which is sortable. This will sort the column either ascending or descending. Refer Leads module.
- To search for a Payment, Use Search engine on top.
- Clicking on the pencil icon Payments list view page to the display of record edit view.

[image.png](#)

Bulk Actions

In list view, select group of records by checking the checkbox, the actions are as follows:

- **Mass Update, Merge, Export, Delete** are similar to the Leads module. Refer Leads module [Bulk Actions](#) for reference.

[image.png](#)