

CLIENTBASE

Tip of the month

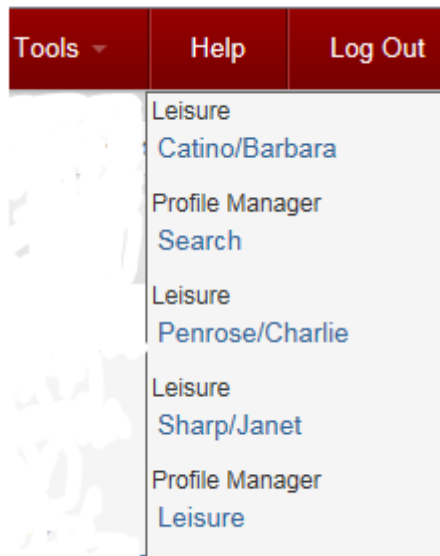
Efficiency rules! ClientBase is rich with functionality to assist with making every work hour a productive hour. Perhaps there are more features that you may not be aware of that can improve efficiencies? Tip of the month is a series designed to open new doors that could just make that work hour even more productive!

Problem:

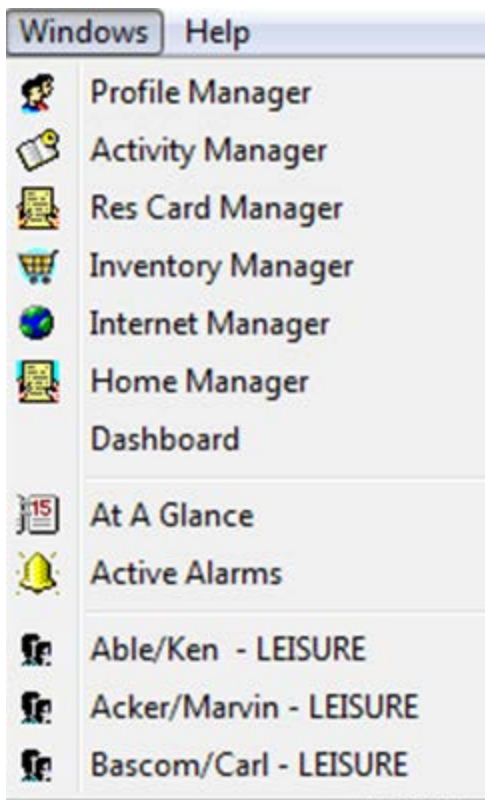
I'm working with my customers all day. Many times I'm working with more than one at the same time. I might be quoting a client at my desk while calling in a final payment for another. How do I navigate between all these profiles without always closing them?

Solution:

Page History in ClientBase Online and the Windows drop down in ClientBase Windows



In ClientBase Online when you are working in a profile and move to another, click Tools, Page History and you can view the last profiles and pages you visited.



In ClientBase Windows, click on Windows in your menu bar and at the bottom you will see a list of all the profiles and screens that are opened.

Remember, if you have questions regarding this or any of our great features join one of our daily Q&A's. Visit www.trams.com/home/training/ for more information.