

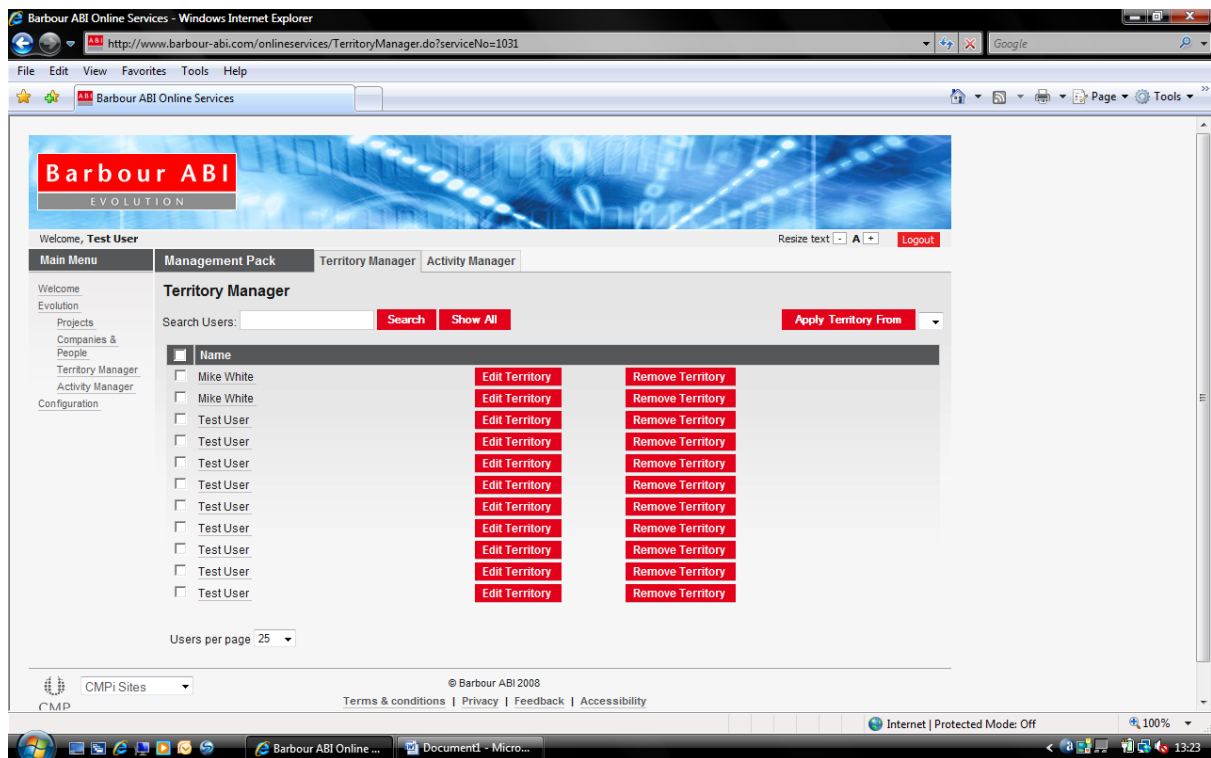
# Evolution Management Pack

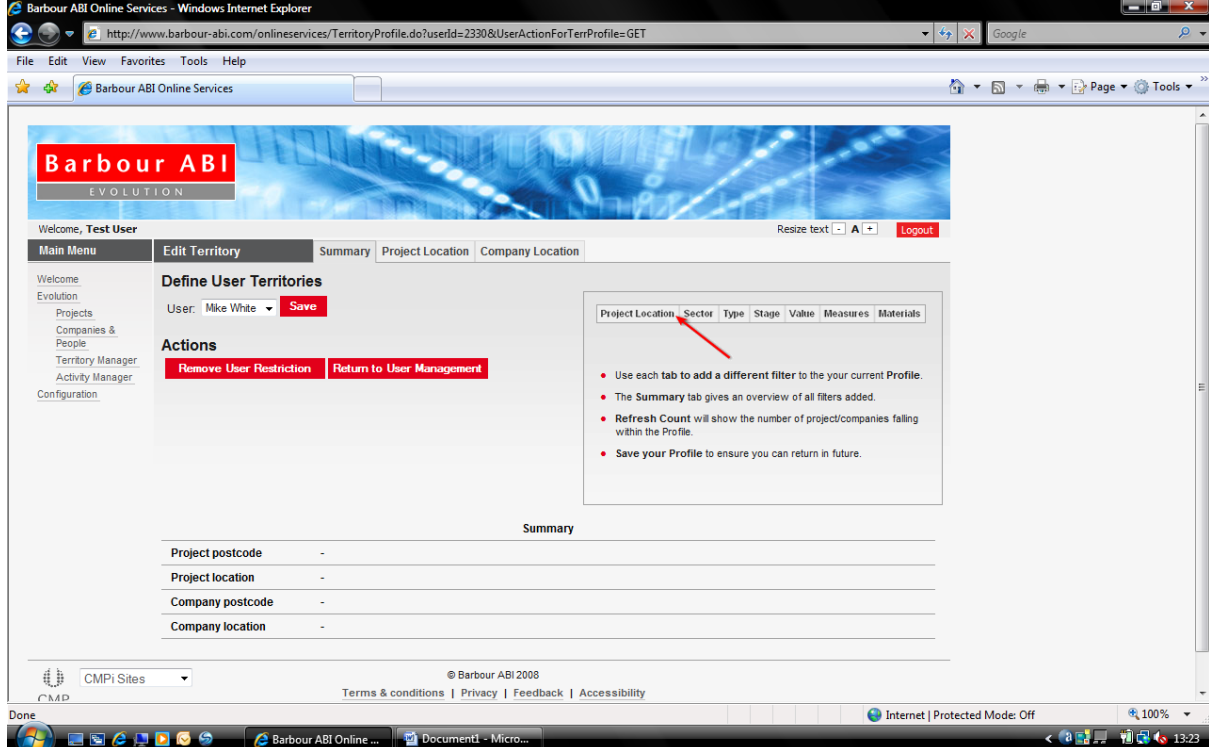
The Evolution Management Pack has been developed to allow companies to manage their users to ensure that they are utilising Evolution on a regular basis, ensuring that they are getting the best out of the system. It also allows companies with regional sales forces to limit the geographical area that each salesperson can access through Evolution.

There are, essentially, two sections to the management pack – the territory manager and the activity manager.

## Territory Manager

The territory manager allows a company to select geographical areas for their users. For example, a sales force in Scotland may not need to be able to view projects in Wales. The territory manager would allow the company to exclude the Welsh leads from the Scottish users. In the screenshot below, the list of users is visible, along with the button to edit the territory that applies to this person. Territory Manager also has the ability to remove this restriction through the ‘remove territory’ button. It is also possible to apply the same set of territory ‘rules’ to several users via the ‘apply territory from’ button at the top right of the screen. This would be handy if, for example, the Scottish sales office had several people whose geographical areas were all the same.

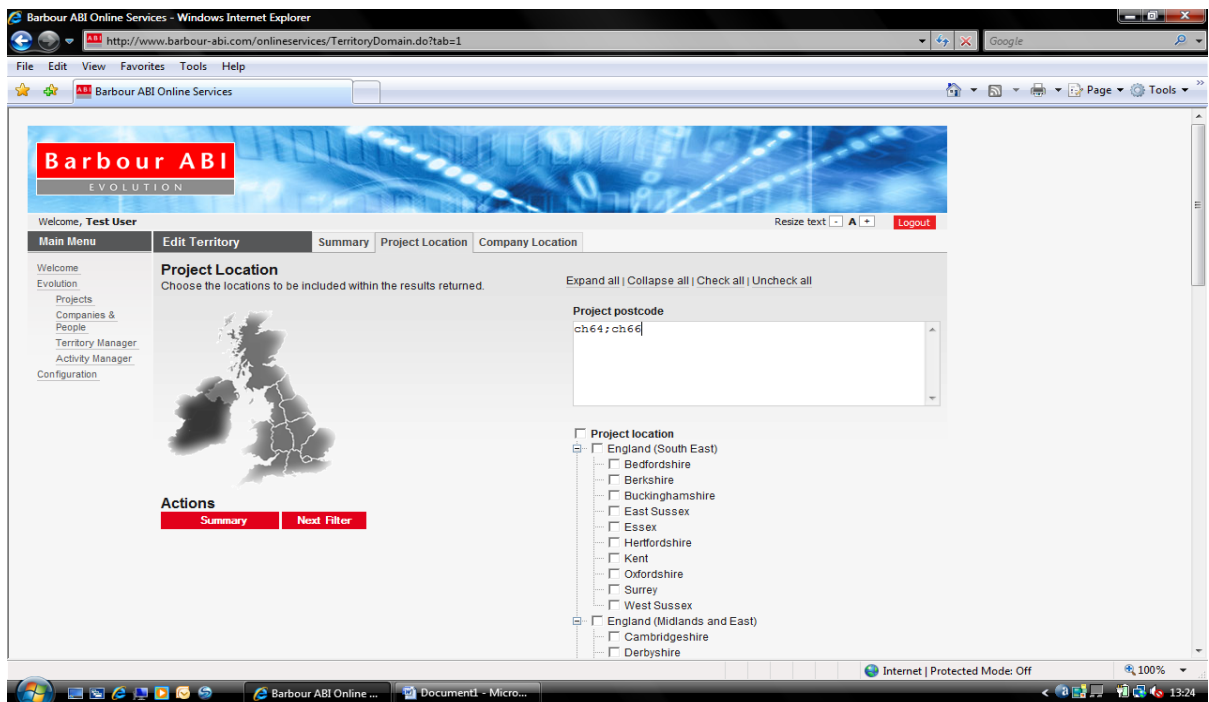




Once inside the editing screen, you will be able to see a summary of the territories screen. This shows the current selections made for that user. The profile of the user below is currently blank.

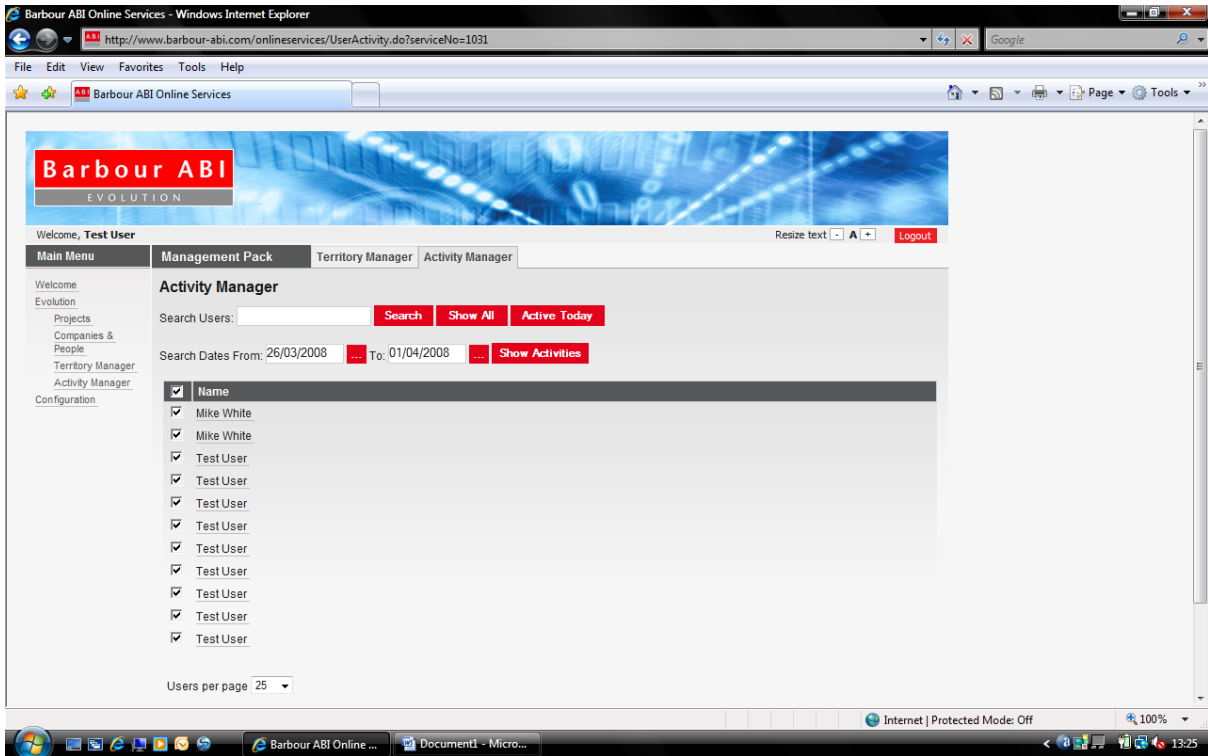
By selecting the 'project location' tab, the location screen is displayed (as below):

## The Activity Manager

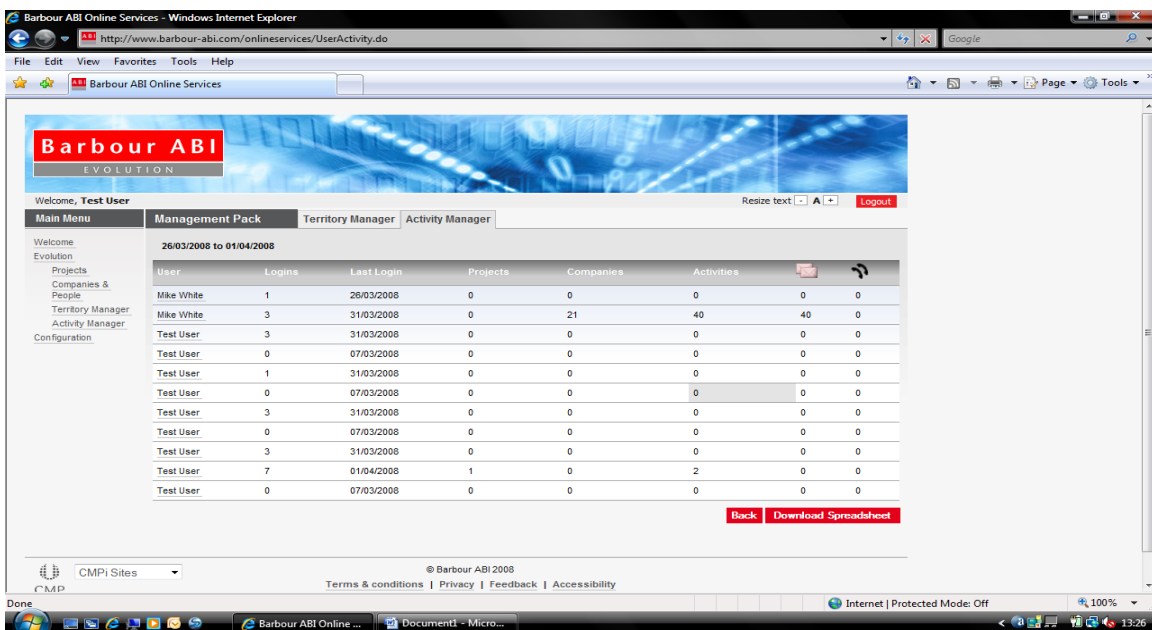


The activity manager allows you to view either individual or selected user's activity across a selected time period. The screenshot below shows the number of active users that can be selected by placing a tick on the left hand side, as well as giving you the ability to select the date range from the calendars at the top of the user list.

The other options allow you to simply select all users, as well as those users who have been active today. Finally, if there are several pages of users there is a search function at the top of the screen.



An example of the resulting report is shown in the screenshot below. By column, the report shows (by user) the number of logins, the date they last logged in, the number of projects and companies they have looked at and the total number of activities. If List track is active on the account it also shows the number of companies marked as already mail-merged and telephoned.



Finally, there is an option to download this data in an Excel spreadsheet format. (see below.)

The screenshot shows a Microsoft Excel spreadsheet titled "Evolution\_summary\_activity\_report\_1206978282846[1]". The spreadsheet has the following data:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	25/03/2008 to 31/03/2008																	
2	User	Logins	Last Login	Projects	Companies	Activities	Calls	Mails										
3	Mike White	1	26/03/2008	0	0	0	0	0										
4	Mike White	3	31/03/2008	0	21	40	0	40										
5	Test User	3	31/03/2008	0	0	0	0	0										
6	Test User	0	07/03/2008	0	0	0	0	0										
7	Test User	1	31/03/2008	0	0	0	0	0										
8	Test User	0	07/03/2008	0	0	0	0	0										
9	Test User	3	31/03/2008	0	0	0	0	0										
10	Test User	0	07/03/2008	0	0	0	0	0										
11	Test User	3	31/03/2008	0	0	0	0	0										
12	Test User	5	31/03/2008	0	0	0	0	0										
13	Test User	0	07/03/2008	0	0	0	0	0										
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