JAN 2025 REFERRAL PORTAL UPDATE

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1. INTRODUCTION

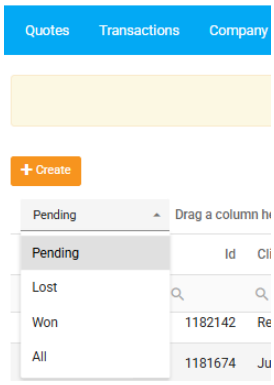
Personal Grids will be updated the weekend of 25th/26th Jan 2025 with a new grid which will then permit you to create your own personalised grids for preferred columns, filters and sort order. The personalised grids are available by person, they are not role/permissions based and allow you to design your own favourites. The grids apply to **QUOTES** and **TRANSACTIONS**.

After an initial period of use, we will then look to create same functionality for **PORTAL ACTIVITY** and **IDENTITY CHECKS**.

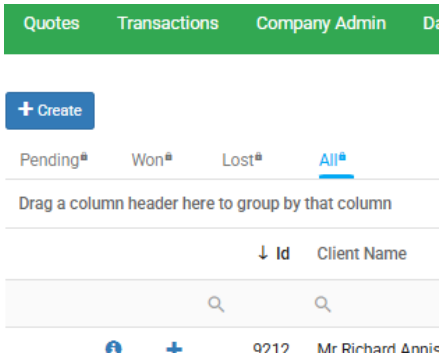
By creating your own personalised grid, these are saved to your profile and when logging in/out of Minerva, you will be able to choose these filters rather than re-establishing your same / preferred position.

2. QUOTES

The current Grid allows a Master Filter for “Pending”, “Lost”, “Won” and “All” as displayed below:-



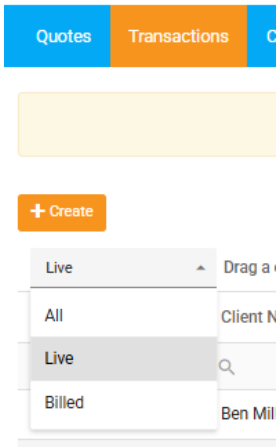
The new look to these master filters is as follows:-



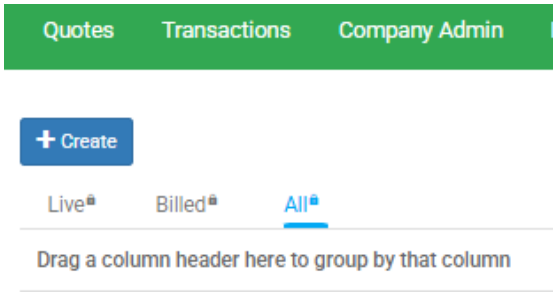
Note the “padlock” symbol against these standard 4 views. These views are standard and on clicking RESET GRID will return you to the default position regardless of any filters or columns that you have selected/deselected.

3. TRANSACTIONS

The current Grid allows a Master Filter for “Live”, “Billed and “All” as displayed below:-



The new look to these master filters is as follows:-



4. CREATING A PERSONALISED GRID

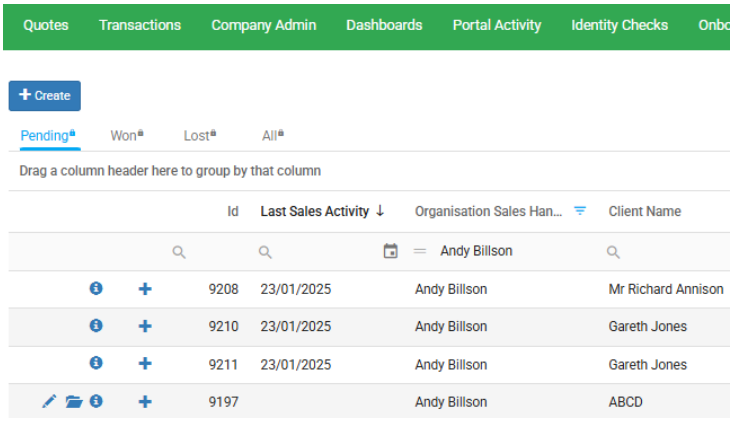
This process to create a personalised grid is the same for both Quotes and Transactions. Using QUOTES as the example for this document, follow these procedures:-

CLICK ON MASTER FILTER = PENDING (Pending is my example)

CHANGE ANY COLUMNS SUCH AS:-

- USING THE COLUMN CHOOSER TO SELECT / DESELECT YOUR PREFERENCES
- DRAG COLUMNS IN THE ORDER YOU WISH TO SEE THEM (WORKING LEFT TO RIGHT)
- CHOOSE A SORT ORDER (ASCENDING / DESCENDING)
- USE ONE OR MORE OF THE FILTER OPTIONS TO NARROW THE DATA LIST (eg:- Filter on an Organisational Sales Handler or a Referrer or Both)

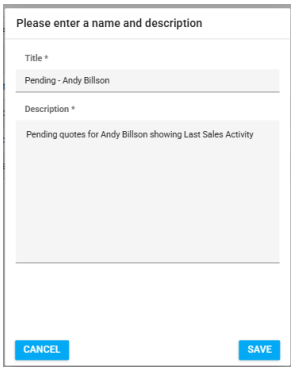
  My Example now looks like this:-



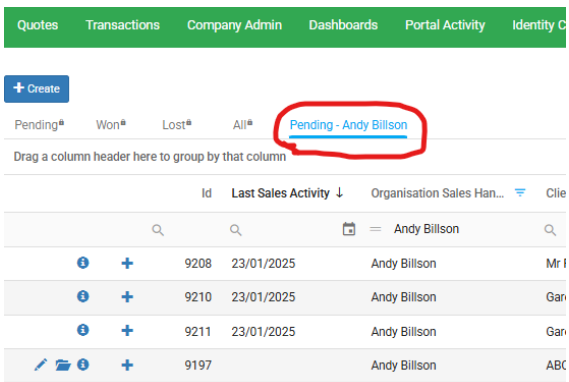
- To SAVE this grid which is Pending Quotes where Andy Billson is Sales Handler, with 2nd and 3rd columns being "Last Sales Activity" and "Organisation Sales Handler". The Sort Order is Descending on Last Sales Activity:-
- CLICK CLONE GRID



- Enter a TITLE "Pending – Andy Billson" and a "DESCRIPTION" (longer Narrative explaining your personalised grid and CLICK SAVE. As follows:-



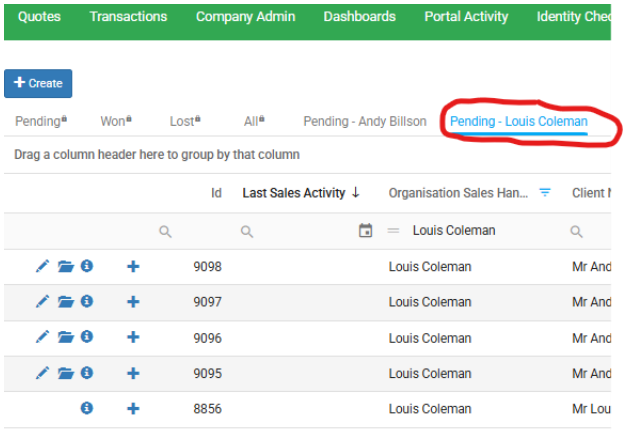
Note that you now have a personalised grid as a new grid to CLICK. See below:-



You can Create as many personal views as you see helpful. So, I now want the same grid but for "Louis Coleman".

- CLICK YOUR NEW GRID (eg:- Pending – Andy Billson)
- CHANGE THE FILTER (eg:- Andy Billson to Louis Coleman)
- CLICK CLONE GRID (Enter a new name/description)

You now have a second personalised grid as follows:-



5. AMENDING A PERSONALISED GRID

If you wish to amend a personalised grid:-

- Click on the grid you wish to amend.
- Make your amendments/choices such as Columns, Filters etc
- Click SAVE GRID and change the Grid name/Description at this stage
- Click SAVE

6. DELETING A PERSONALISED GRID

The option to Delete a grid:-

- Click on the grid name
- Click DELETE GRID
- Click YES to confirm the Delete

7. RESETTING A PERSONALISED GRID

To Reset a Grid back to a Default:-

- Click on the grid name
- Click RESET GRID
- The Grid will return to the last Saved setting (Personalised Grids) or the Minerva standard grid layout for one of the locked grids.

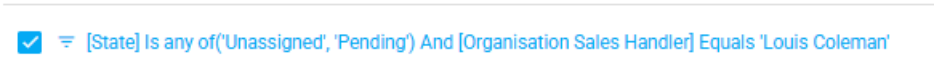
8. LOCKED (MINERVA STANDARD) GRIDS

The standard (Locked) grids cannot be changed and will revert to their standard setting on closing the browser / logging in/out of Minerva.

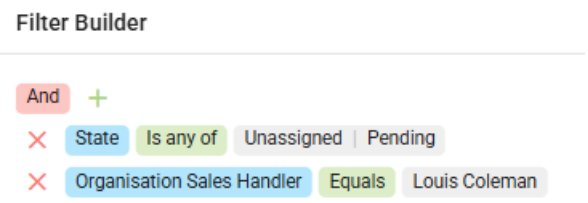
You can use these grids as a template to clone as a starting point.

9. QUERY SELECTOR

When filtering and creating a grid, Minerva is generating a “Filter Builder” which is displayed at the bottom of the screen. This is a clickable link. Example from above has built a Filter Builder as:-



If you Click the Query, a Filter Builder will display the grid rules:-



You can amend rules here using the AND, X or + but that is the equivalent of using Filters and Column selections as described above.

END