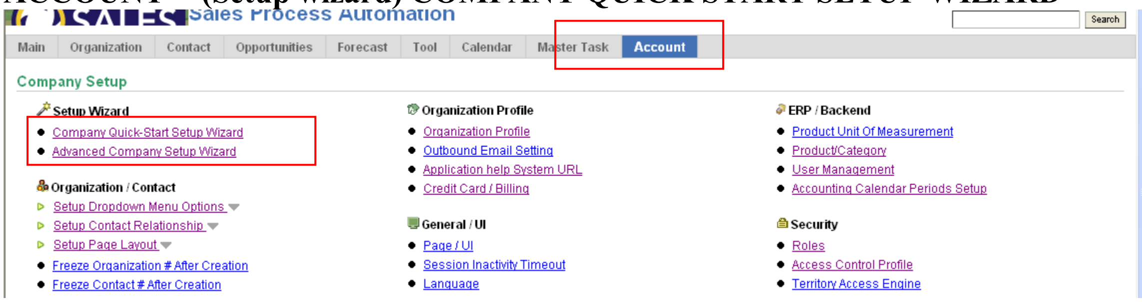
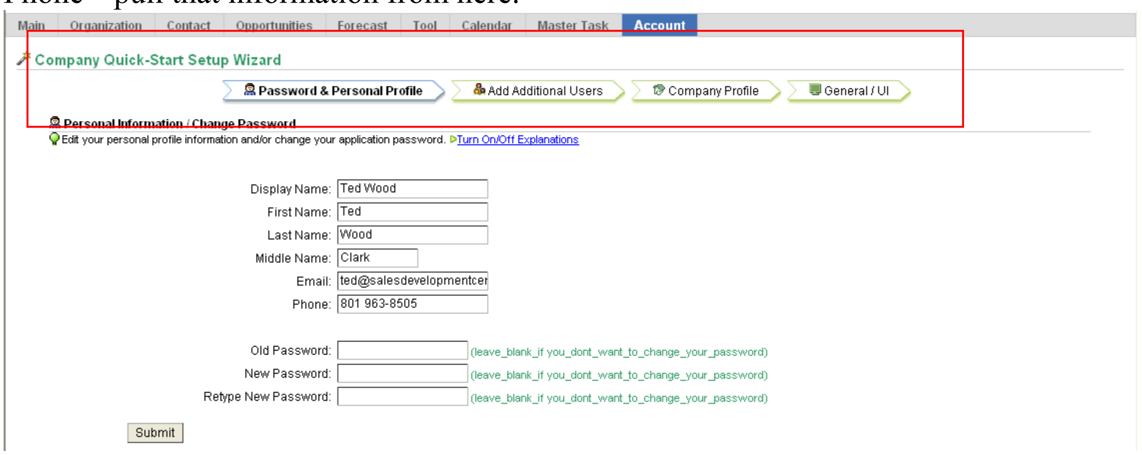
Administrative Training

Most administrative tools are located in the "ACCOUNT" tab.

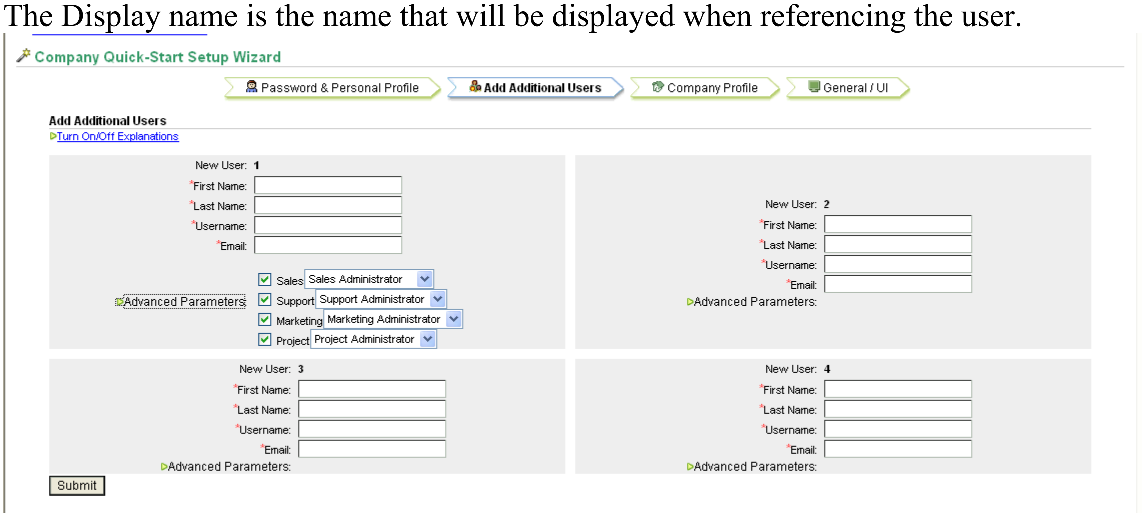
#1-COMPANY QUICK START SETUP WIZARD
ACCOUNT>>(Setup wizard) COMPANY QUICK START SETUP WIZARD



Password and Personal Profile: Edit personal information and change password. Note: All "Merge" and "AutoFill" forms that refer to the "UserName / User Email / User Phone" pull that information from here.

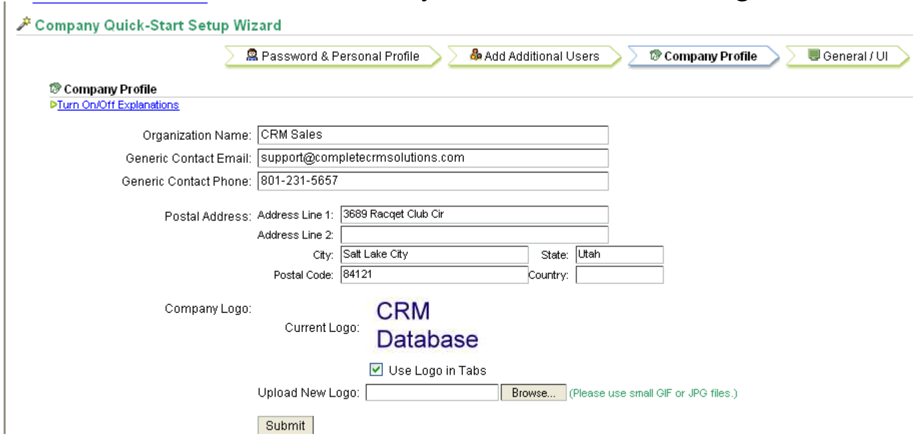


Add Additional Users: The "UserName" is the name that the user will use to log in. The Display name is the name that will be displayed when referencing the user.

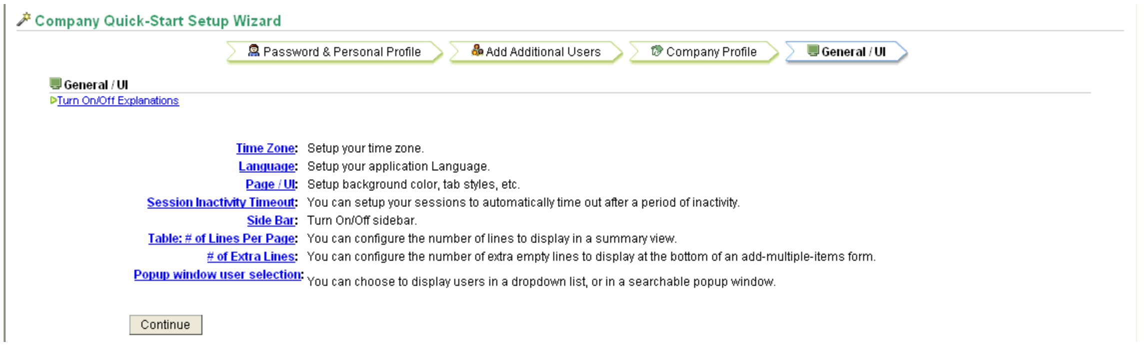


Company Profile (logo can be changed here)

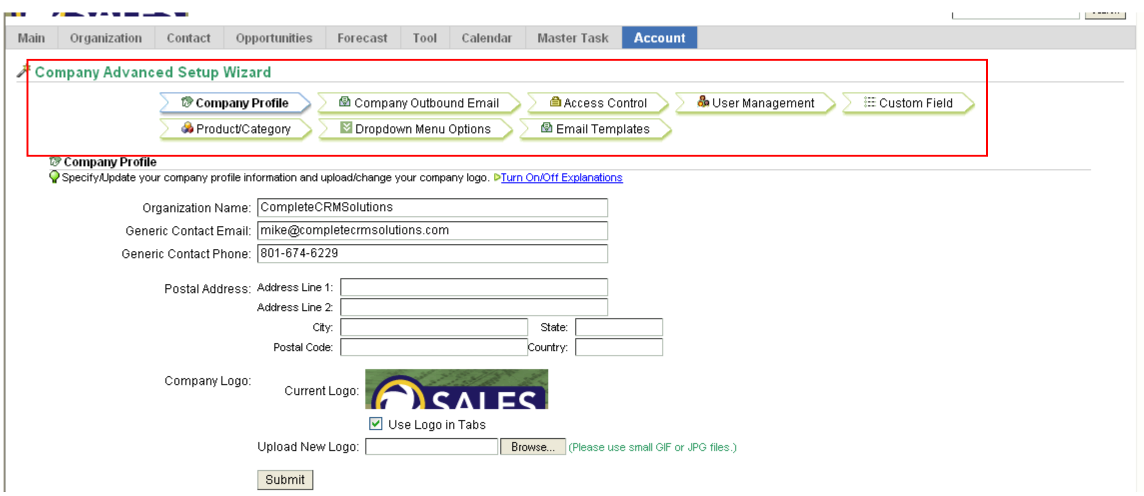
To edit the logo, click the browse button to find the logo on your local machine. Be sure to check the box to indicate that you want to "Use the Logo in Tabs" then click Submit.



General U/I

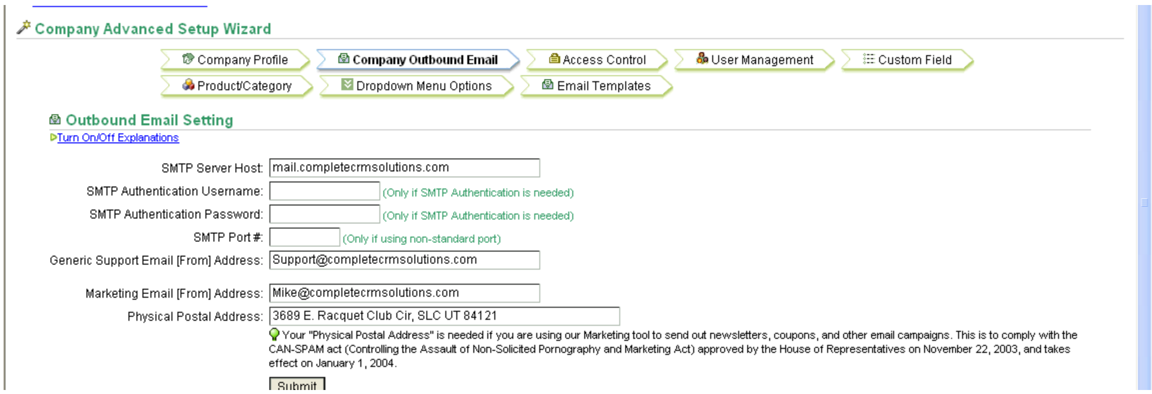


#2-Company Advanced Setup Wizard



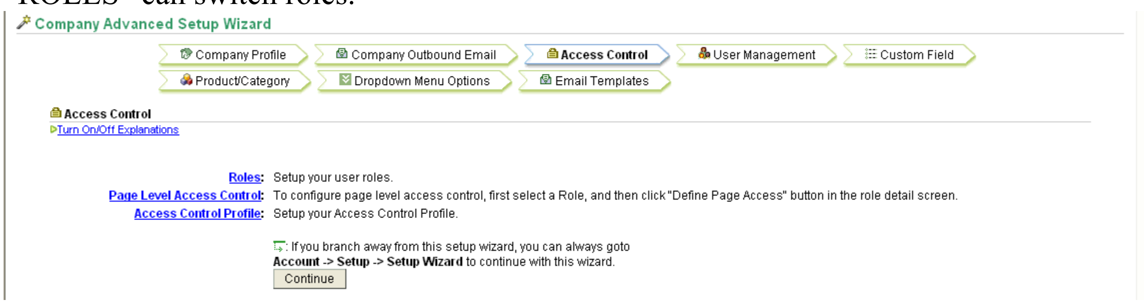
Company Outbound Email

Before you can send ougoing emails, you will need to configure your outbound email settings.

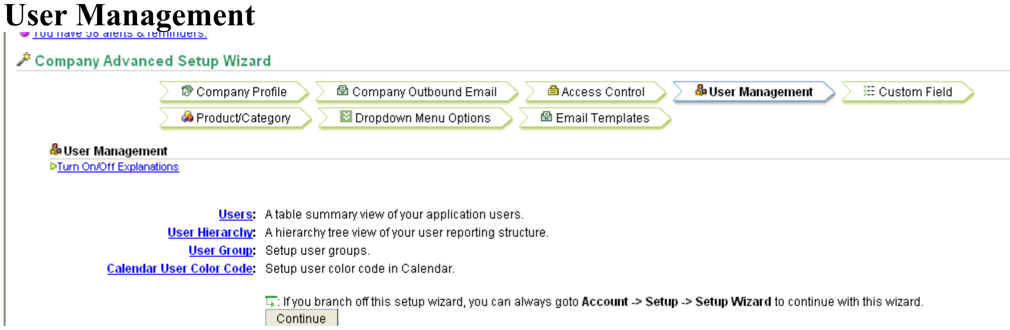


Access Control

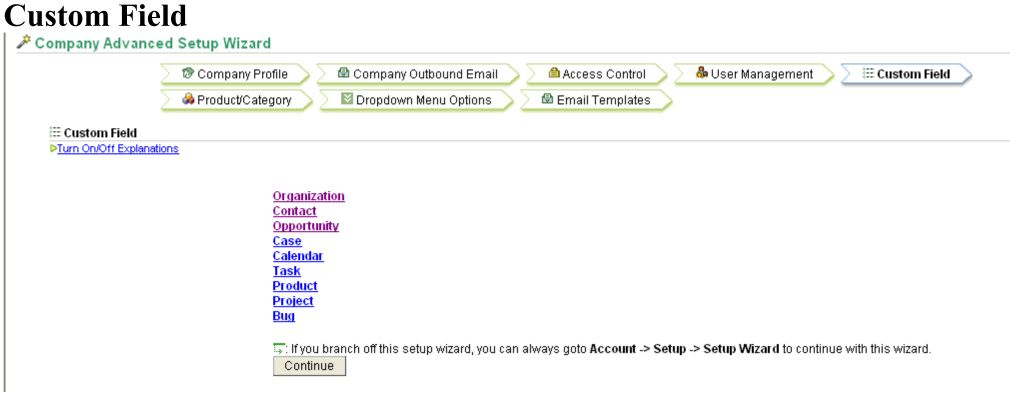
To give different levels of access to different groups of users. All "ROLES" are based on 1 of 3 foundational Role Types: Sales Rep, Manager, Admin. The Access to specific records as well as the page layout can be different for different roles. Users with multiple "ROLES" can switch roles.



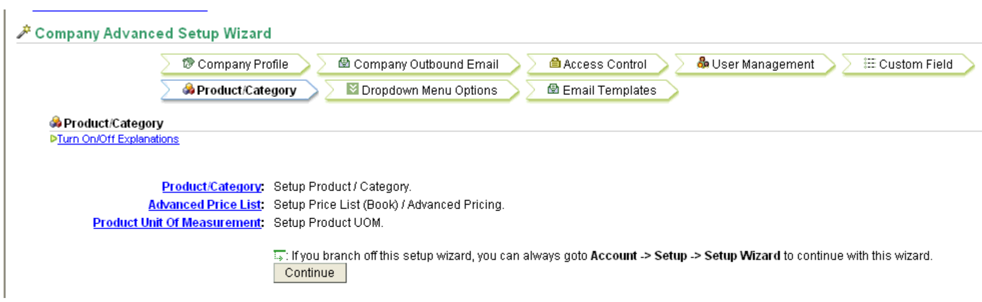
User Management



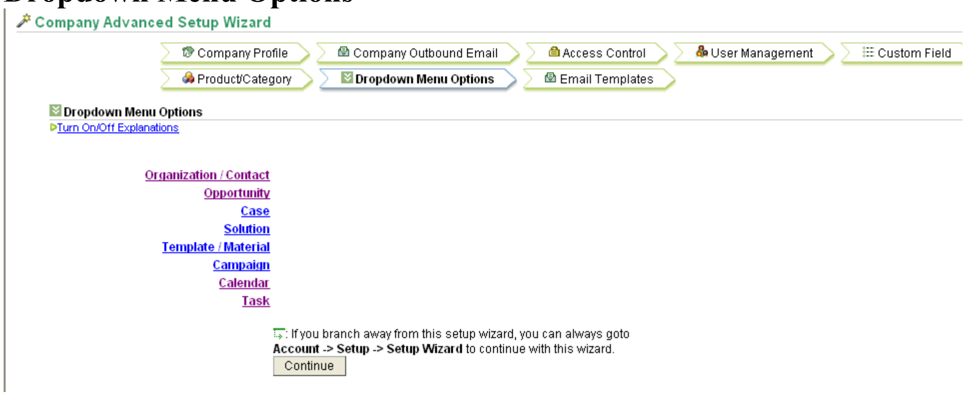
Custom Field



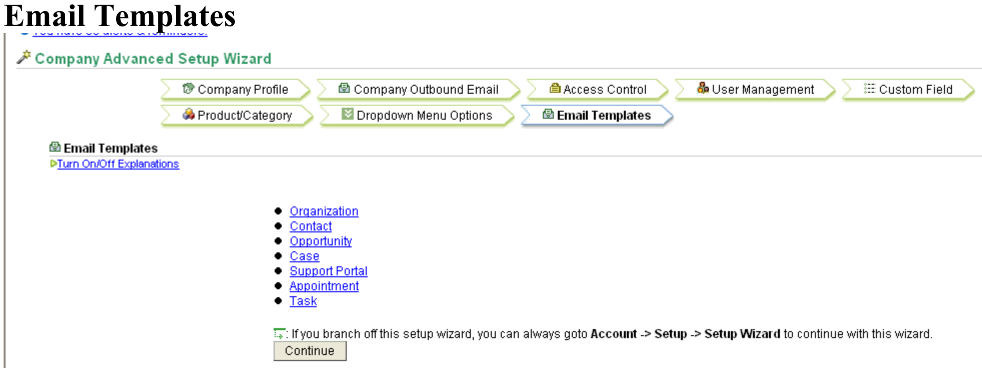
Product/ Category



Dropdown Menu Options

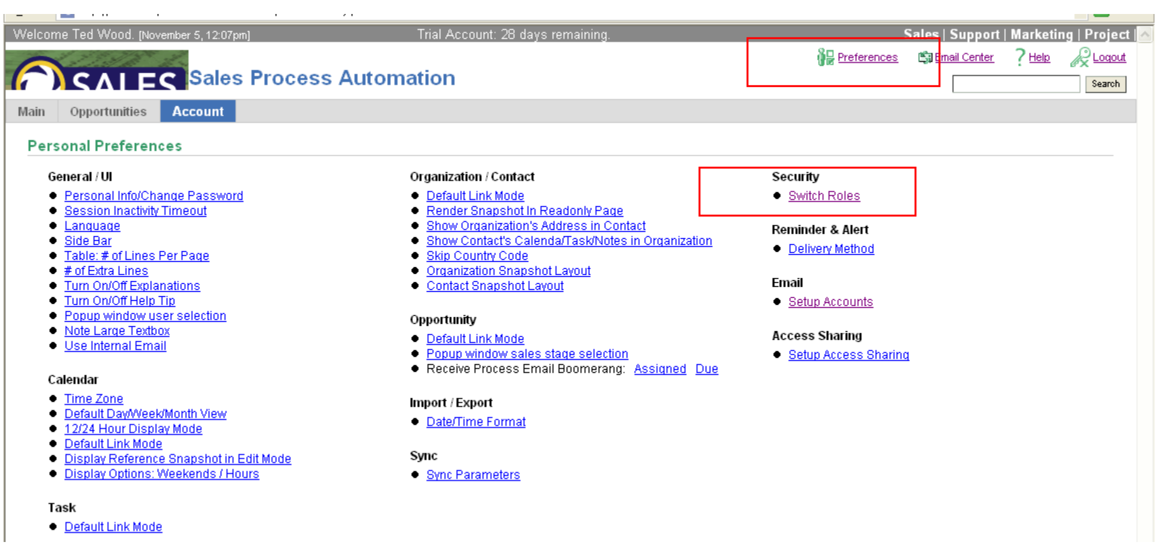


Email Templates



To Change Roles:

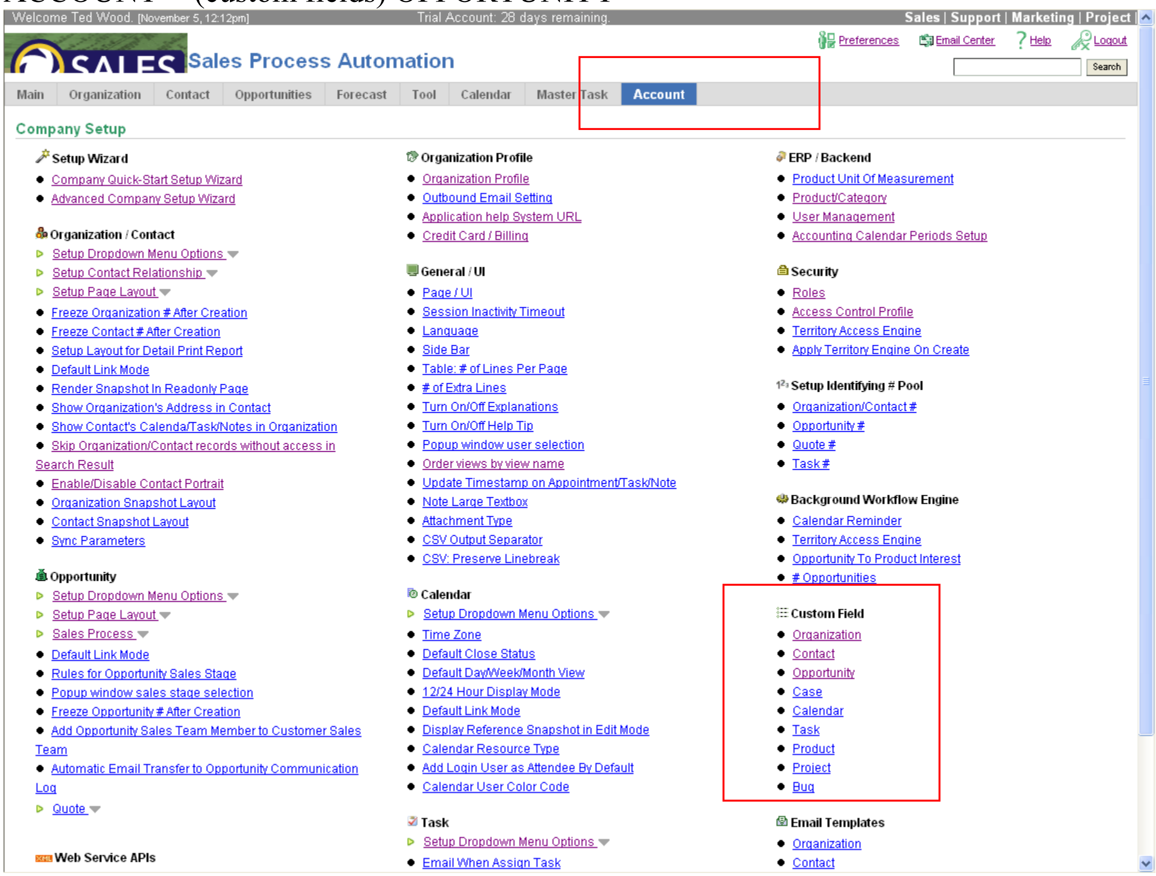
Example: To see the application as a sales rep would see it.



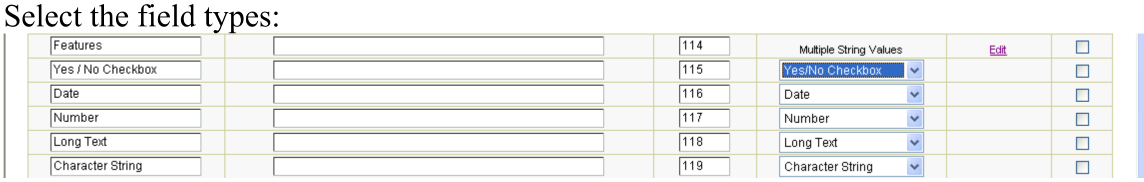
<u>Adding a Custom Field to a page is a 2 part process</u>:

Part 1- Add the custom field to the database
Part 2- Place the custom field on the viewable screen

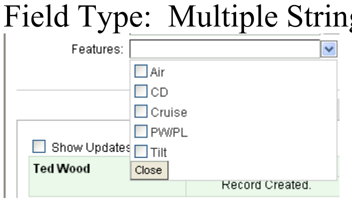
Part 1- Add the custom field to the database
Custom Fields:
ACCOUNT>>(custom fields) OPPORTUNITY



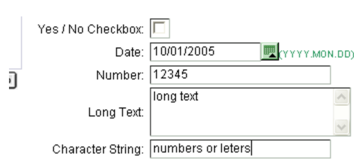
Select the field types:



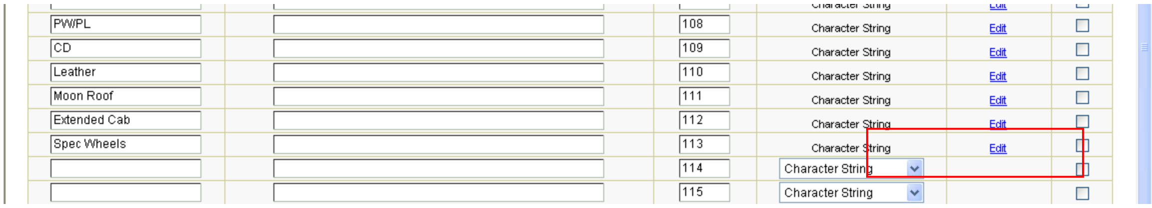
Field Type: Multiple String Values



Other field types:



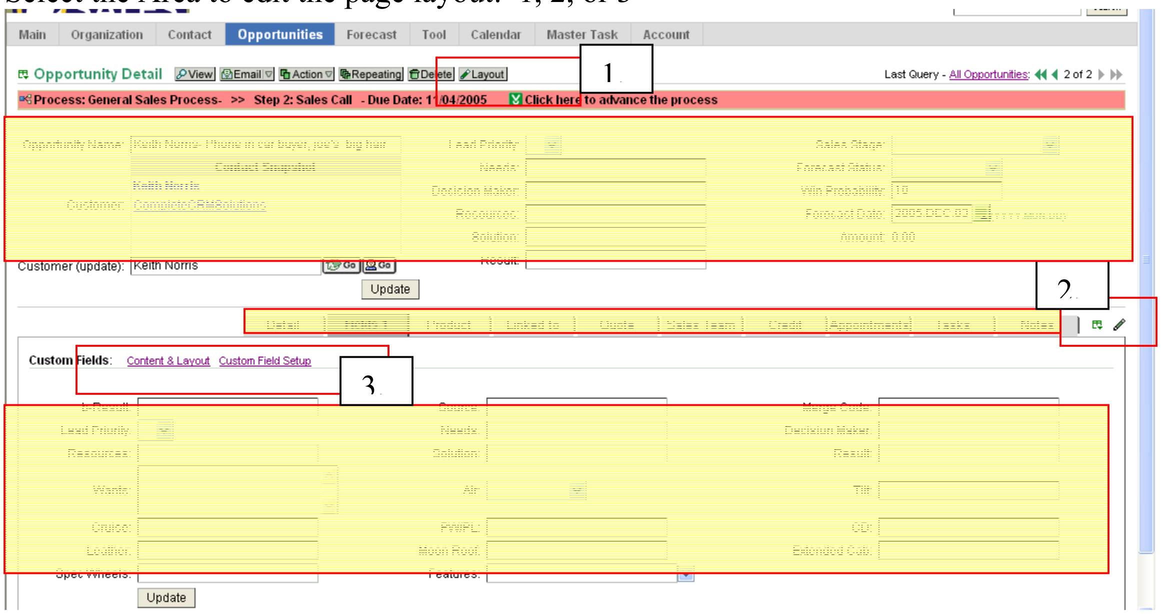
Edit Dropdown values of Custom Fields fo: Multiple String and Character string:



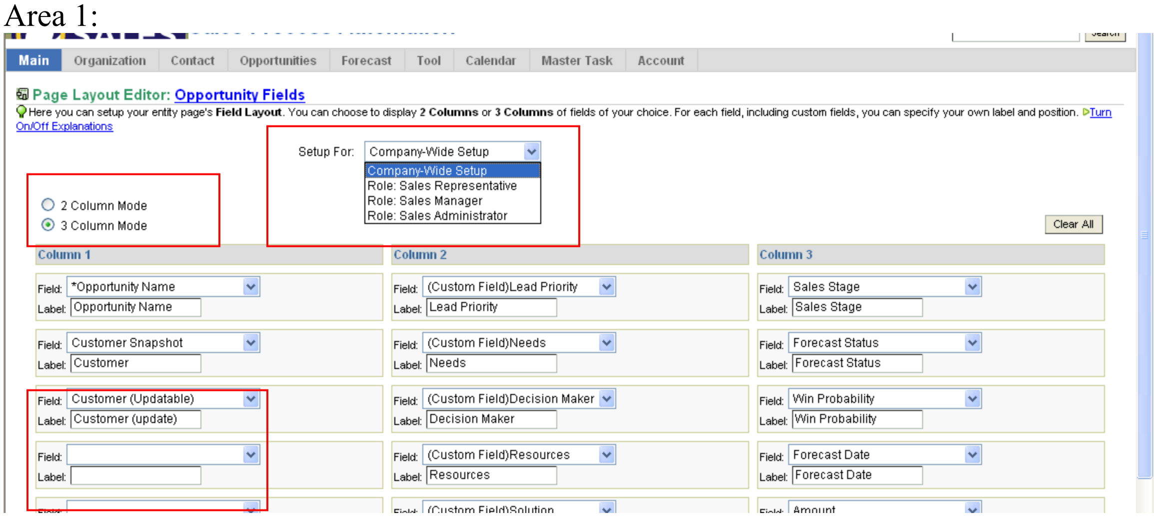
Edit Page Layout

Part 2- Place the custom field on the viewable screen

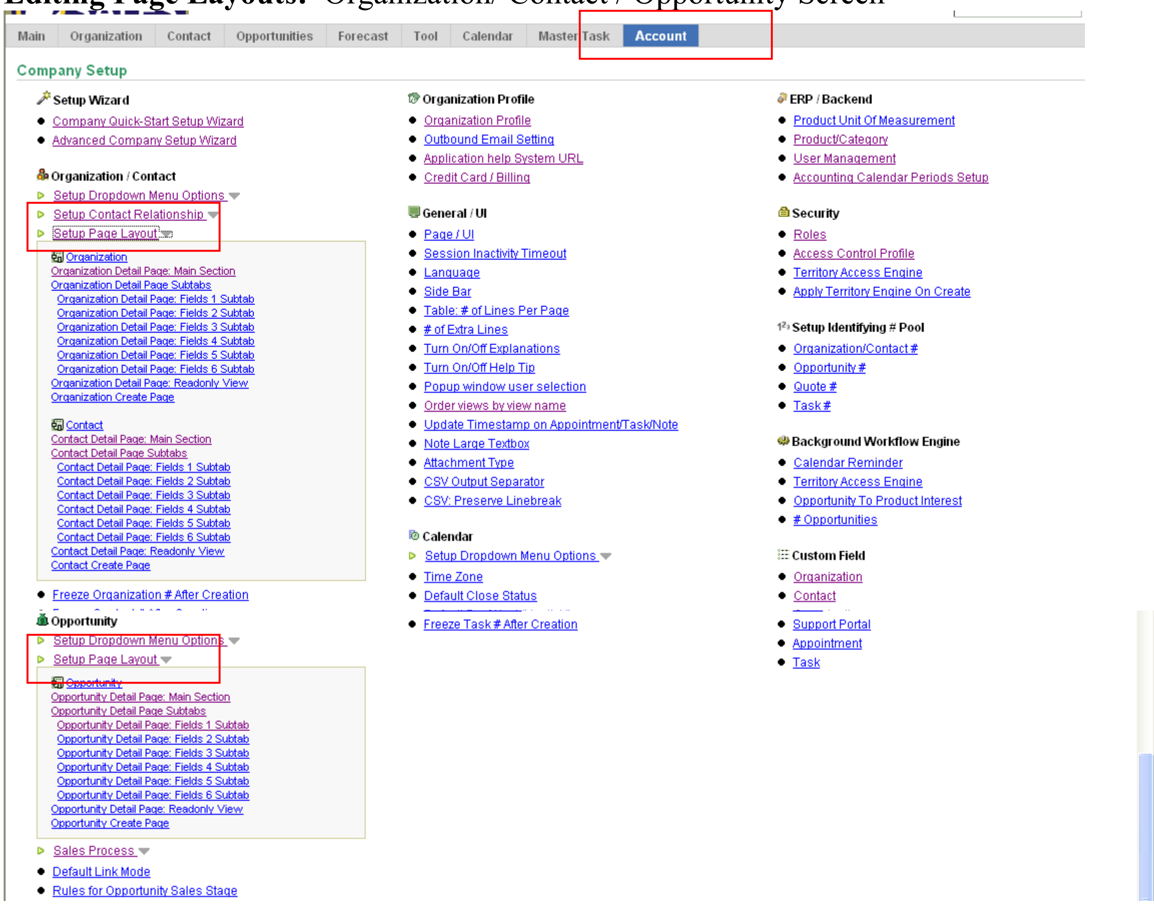
Select the Area to edit the page layout: 1, 2, or 3

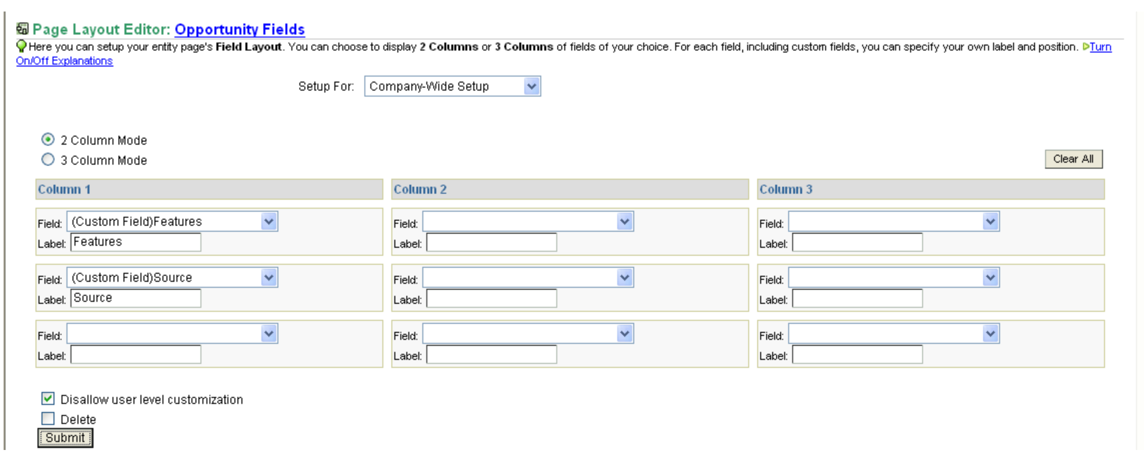


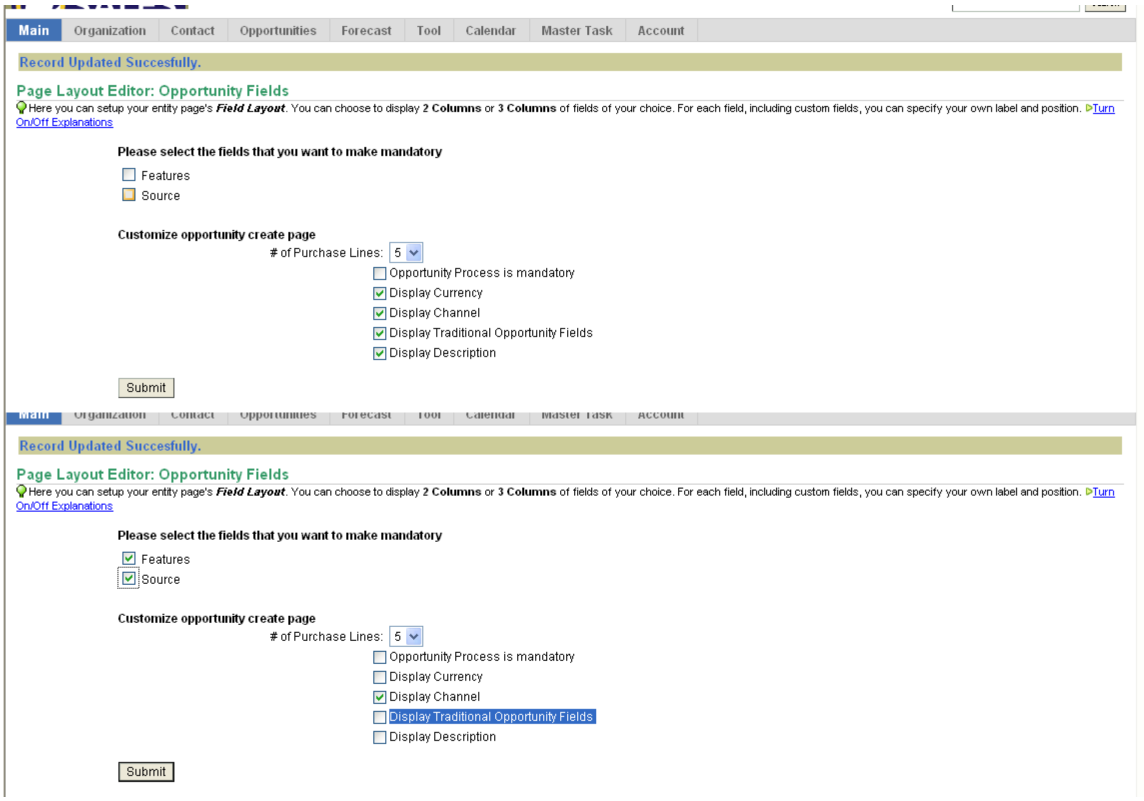
Area 1:



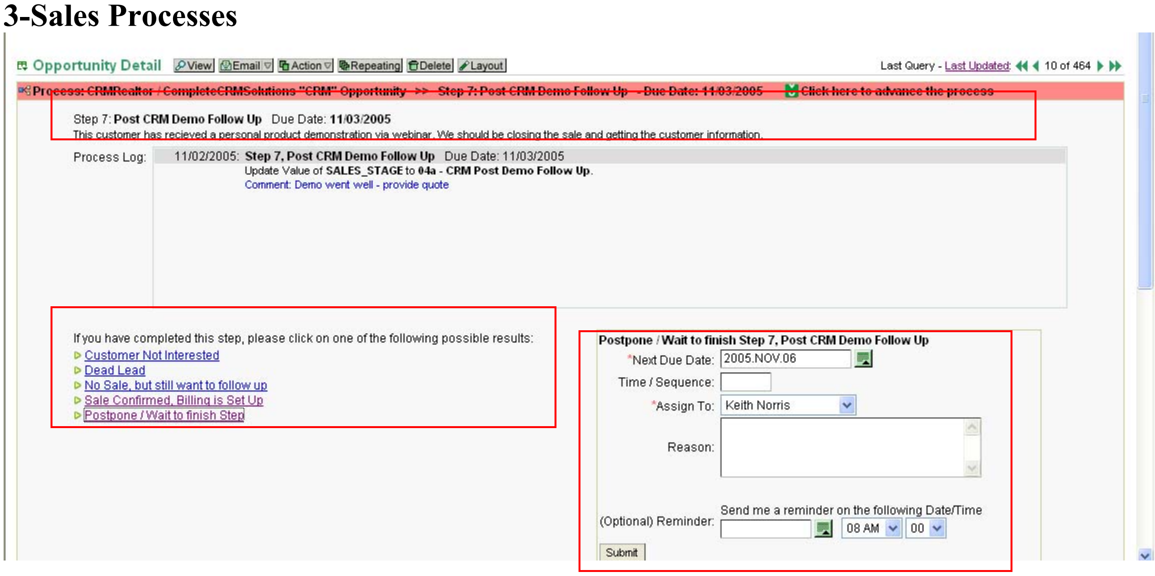
Editing Page Layouts: Organization/ Contact / Opportunity Screen



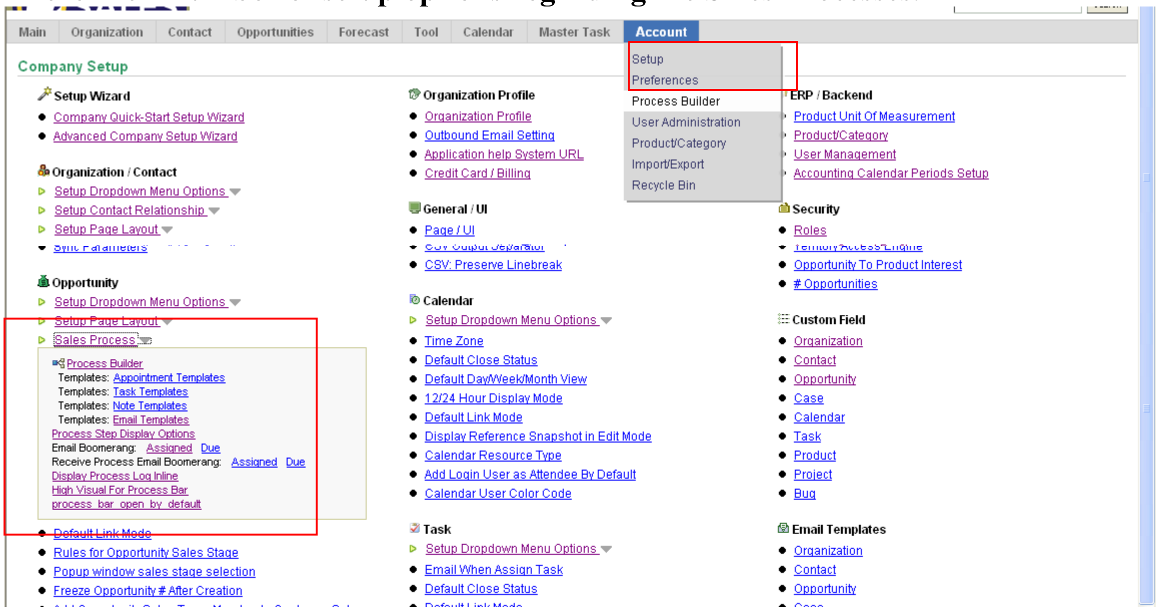




3-Sales Processes

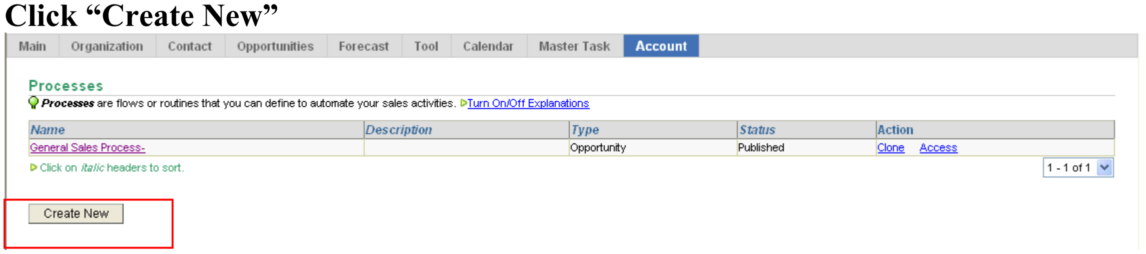


There are a number of setup options regarding the Sales Processes.

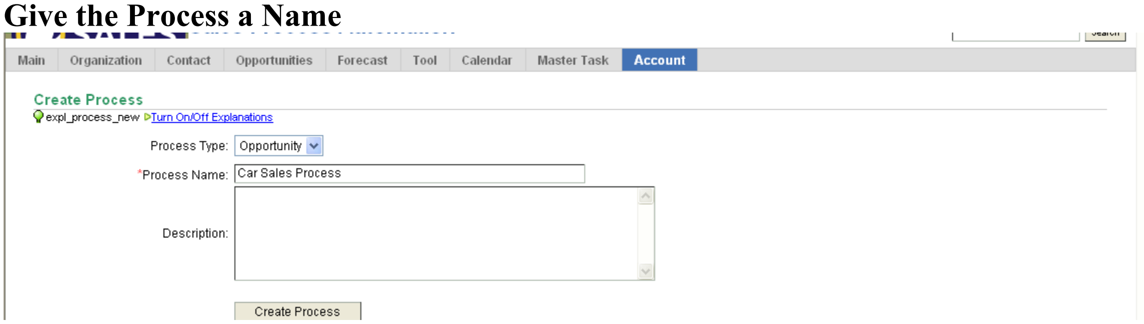


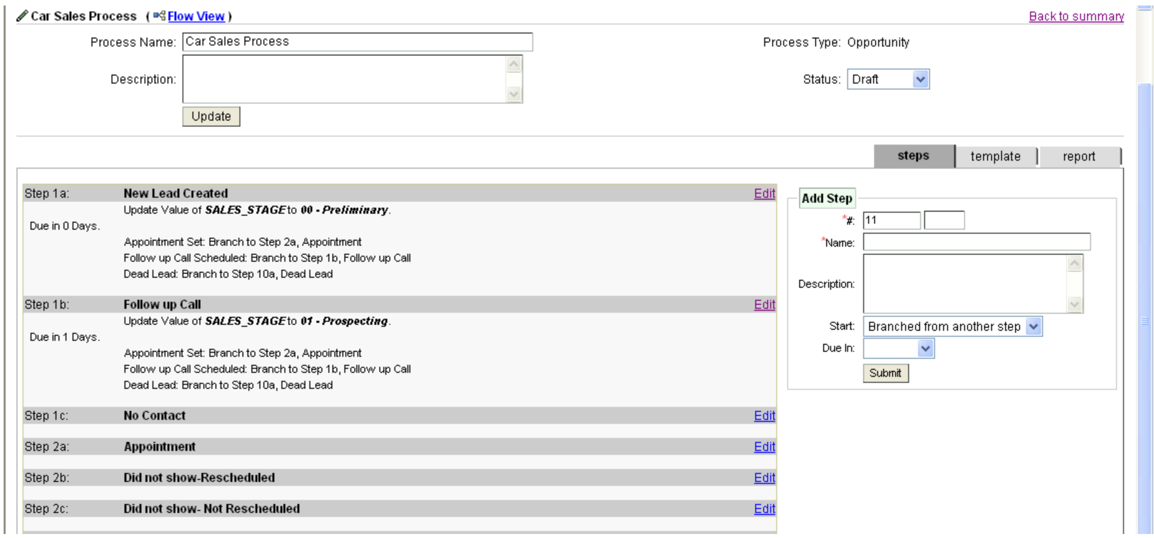
To Create a new Sales Process

Click "Create New"

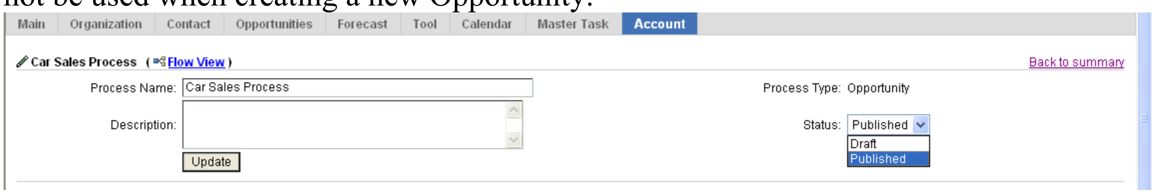


Give the Process a Name

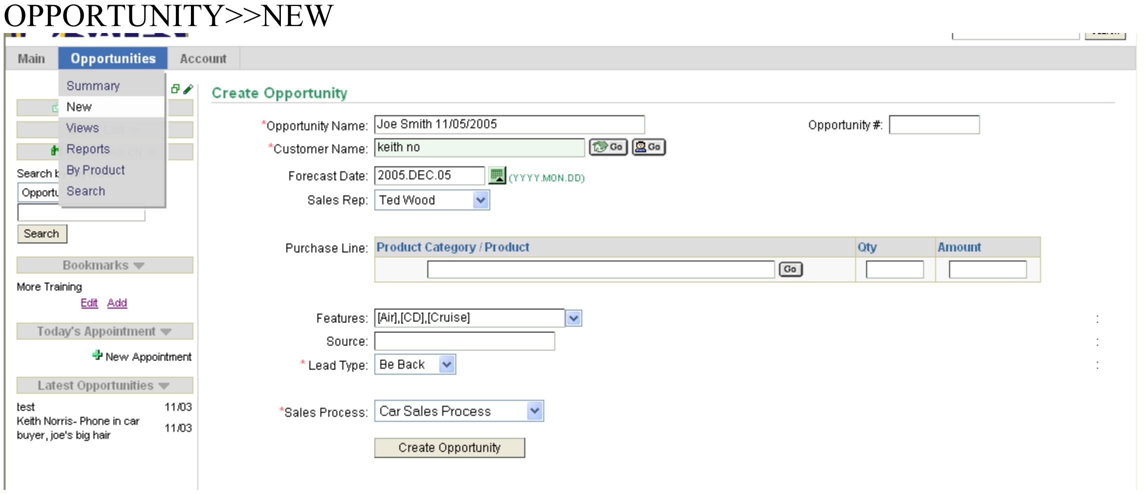




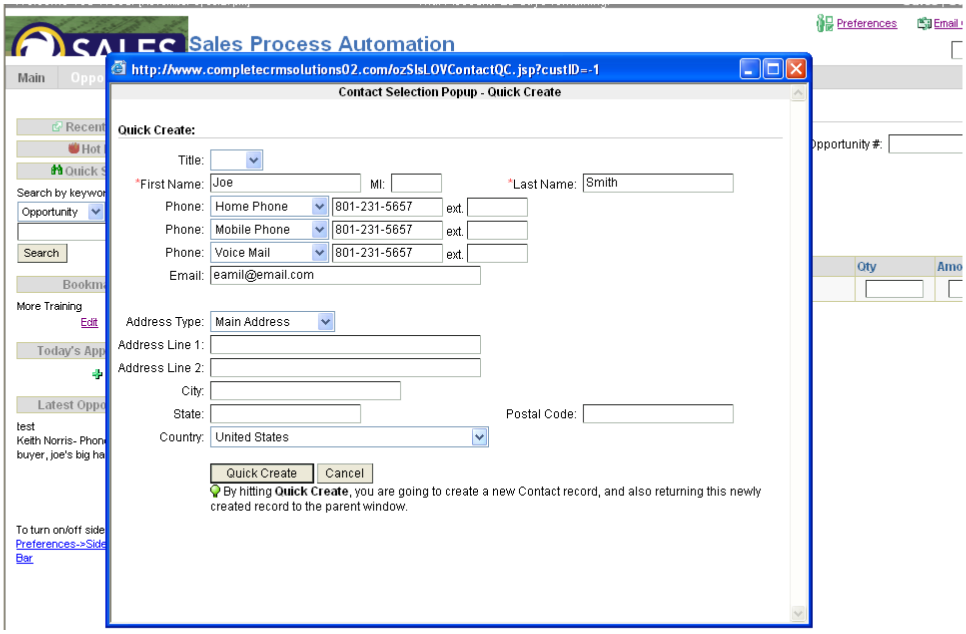
Be sure to change its status to “Published”. Processes that are in the “Draft” status, will not be used when creating a new Opportunity.



What the Sales Rep sees when creating a “New Opportunity”
OPPORTUNITY>>NEW



If the contact record is not recognized when typing in the “Customer” box, you will need to create a new customer by clicking on one of the “GO” buttons. The “Go” buttons will link this newly created opportunity to either a Contact or an Organization.



Creating New "VIEWS"