

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

Company Setup

- Setup Wizard
 - Company Quick-Start Setup Wizard
 - Advanced Company Setup Wizard
- Organization / Contact
 - Setup Dropdown Menu Options
 - Setup Contact Relationship
 - Setup Page Layout
 - Freeze Organization # After Creation
 - Freeze Contact # After Creation
- Organization Profile
 - Organization Profile
 - Outbound Email Setting
 - Application help System URL
 - Credit Card / Billing
- General / UI
 - Page / UI
 - Session Inactivity Timeout
 - Language
- ERP / Backend
 - Product Unit Of Measurement
 - Product/Category
 - User Management
 - Accounting Calendar Periods Setup
- Security
 - Roles
 - Access Control Profile
 - Territory Access Engine

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.

Company Quick-Start Setup Wizard

Personal Information / Change Password

Display Name: Ted Wood

First Name: Ted

Last Name: Wood

Middle Name: Clark

Email: ted@salesdevelopmentcenter

Phone: 801 963-8505

Old Password: (leave_blank_if_you_dont_want_to_change_your_password)

New Password: (leave_blank_if_you_dont_want_to_change_your_password)

Retype New Password: (leave_blank_if_you_dont_want_to_change_your_password)

Submit

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 Quick-Start Setup Wizard

Add Additional Users

New User: 1

*First Name: []

*Last Name: []

*Username: []

*Email: []

Advanced Parameters:

- Sales: Sales Administrator
- Support: Support Administrator
- Marketing: Marketing Administrator
- Project: Project Administrator

New User: 2

*First Name: []

*Last Name: []

*Username: []

*Email: []

Advanced Parameters:

New User: 3

*First Name: []

*Last Name: []

*Username: []

*Email: []

Advanced Parameters:

New User: 4

*First Name: []

*Last Name: []

*Username: []

*Email: []

Advanced Parameters:

Submit

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.

Company Quick-Start Setup Wizard

Navigation: Password & Personal Profile | Add Additional Users | **Company Profile** | General / UI

Company Profile
[Turn On/Off Explanations](#)

Organization Name: CRM Sales
Generic Contact Email: support@completecrmsolutions.com
Generic Contact Phone: 801-231-5657

Postal Address: Address Line 1: 3689 Racquet Club Cir
Address Line 2:
City: Salt Lake City State: Utah
Postal Code: 84121 Country:

Company Logo:
Current Logo: CRM Database
 Use Logo in Tabs
Upload New Logo: Browse... (Please use small GIF or JPG files.)

General U/I

Company Quick-Start Setup Wizard

Navigation: Password & Personal Profile | Add Additional Users | Company Profile | **General / UI**

General / UI
[Turn On/Off Explanations](#)

Time Zone: Setup your time zone.
Language: Setup your application Language.
Page / UI: Setup background color, tab styles, etc.
Session Inactivity Timeout: You can setup your sessions to automatically time out after a period of inactivity.
Side Bar: Turn On/Off sidebar.
Table: # of Lines Per Page: You can configure the number of lines to display in a summary view.
of Extra Lines: You can configure the number of extra empty lines to display at the bottom of an add-multiple-items form.
Popup window user selection: You can choose to display users in a dropdown list, or in a searchable popup window.

#2-Company Advanced Setup Wizard

Main | Organization | Contact | Opportunities | Forecast | Tool | Calendar | Master Task | **Account**

Company Advanced Setup Wizard

Navigation: Company Profile | Company Outbound Email | Access Control | User Management | Custom Field | Product/Category | **Dropdown Menu Options** | Email Templates

Company Profile
[Specify/Update your company profile information and upload/change your company logo.](#) [Turn On/Off Explanations](#)

Organization Name: CompleteCRMSolutions
Generic Contact Email: mike@completecrmsolutions.com
Generic Contact Phone: 801-674-6229

Postal Address: Address Line 1:
Address Line 2:
City: State:
Postal Code: Country:

Company Logo:
Current Logo: SALES
 Use Logo in Tabs
Upload New Logo: Browse... (Please use small GIF or JPG files.)

Company Outbound Email

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

Company Advanced Setup Wizard

[Company Profile](#)
[Company Outbound Email](#)
[Access Control](#)
[User Management](#)
[Custom Field](#)

[Product/Category](#)
[Dropdown Menu Options](#)
[Email Templates](#)

Outbound Email Setting

[Turn On/Off Explanations](#)

SMTP Server Host:

SMTP Authentication Username: (Only if SMTP Authentication is needed)

SMTP Authentication Password: (Only if SMTP Authentication is needed)

SMTP Port #: (Only if using non-standard port)

Generic Support Email [From] Address:

Marketing Email [From] Address:

Physical Postal Address:

Your "Physical Postal Address" is needed if you are using our Marketing tool to send out newsletters, coupons, and other email campaigns. This is to comply with the CAN-SPAM act (Controlling the Assault of Non-Solicited Pornography and Marketing Act) approved by the House of Representatives on November 22, 2003, and takes effect on January 1, 2004.

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.

Company Advanced Setup Wizard

[Company Profile](#)
[Company Outbound Email](#)
[Access Control](#)
[User Management](#)
[Custom Field](#)

[Product/Category](#)
[Dropdown Menu Options](#)
[Email Templates](#)

Access Control

[Turn On/Off Explanations](#)

Roles: Setup your user roles.

Page Level Access Control: To configure page level access control, first select a Role, and then click "Define Page Access" button in the role detail screen.

Access Control Profile: Setup your Access Control Profile.

If you branch away from this setup wizard, you can always goto **Account -> Setup -> Setup Wizard** to continue with this wizard.

User Management

Company Advanced Setup Wizard

[Company Profile](#)
[Company Outbound Email](#)
[Access Control](#)
[User Management](#)
[Custom Field](#)

[Product/Category](#)
[Dropdown Menu Options](#)
[Email Templates](#)

User Management

[Turn On/Off Explanations](#)

[User Management](#) -> [Users](#) -> [User Hierarchy](#) -> [User Group](#) -> [Calendar User Color Code](#)

Users: A table summary view of your application users.

User Hierarchy: A hierarchy tree view of your user reporting structure.

User Group: Setup user groups.

Calendar User Color Code: Setup user color code in Calendar.

If you branch off this setup wizard, you can always goto **Account -> Setup -> Setup Wizard** to continue with this wizard.

Custom Field

Company Advanced Setup Wizard

[Company Profile](#)
[Company Outbound Email](#)
[Access Control](#)
[User Management](#)
[Custom Field](#)

[Product/Category](#)
[Dropdown Menu Options](#)
[Email Templates](#)

Custom Field

[Turn On/Off Explanations](#)

[Organization](#)
[Contact](#)
[Opportunity](#)
[Case](#)
[Calendar](#)
[Task](#)
[Product](#)
[Project](#)
[Bug](#)

If you branch off this setup wizard, you can always goto **Account -> Setup -> Setup Wizard** to continue with this wizard.

Product/ Category

Company Advanced Setup Wizard

[Company Profile](#)
[Company Outbound Email](#)
[Access Control](#)
[User Management](#)
[Custom Field](#)

[Product/Category](#)
[Dropdown Menu Options](#)
[Email Templates](#)

Product/Category

[Turn On/Off Explanations](#)

Product/Category: Setup Product / Category.
Advanced Price List: Setup Price List (Book) / Advanced Pricing.
Product Unit Of Measurement: Setup Product UOM.

If you branch off this setup wizard, you can always goto **Account -> Setup -> Setup Wizard** to continue with this wizard.

Dropdown Menu Options

Company Advanced Setup Wizard

[Company Profile](#)
[Company Outbound Email](#)
[Access Control](#)
[User Management](#)
[Custom Field](#)

[Product/Category](#)
[Dropdown Menu Options](#)
[Email Templates](#)

Dropdown Menu Options

[Turn On/Off Explanations](#)

[Organization / Contact](#)
[Opportunity](#)
[Case](#)
[Solution](#)
[Template / Material](#)
[Campaign](#)
[Calendar](#)
[Task](#)

If you branch away from this setup wizard, you can always goto **Account -> Setup -> Setup Wizard** to continue with this wizard.

Email Templates

Company Advanced Setup Wizard

[Company Profile](#)
[Company Outbound Email](#)
[Access Control](#)
[User Management](#)
[Custom Field](#)

[Product/Category](#)
[Dropdown Menu Options](#)
[Email Templates](#)

Email Templates

[Turn On/Off Explanations](#)

- [Organization](#)
- [Contact](#)
- [Opportunity](#)
- [Case](#)
- [Support Portal](#)
- [Appointment](#)
- [Task](#)

If you branch off this setup wizard, you can always goto **Account -> Setup -> Setup Wizard** to continue with this wizard.

To Change Roles:

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

Welcome Ted Wood. [November 5, 12:07pm] Trial Account: 26 days remaining.

Sales | Support | Marketing | Project

[Preferences](#)
[Email Center](#)
[Help](#)
[Logout](#)

SALES Sales Process Automation

Main | Opportunities | **Account**

Personal Preferences

General / UI

- [Personal Info/Change Password](#)
- [Session Inactivity Timeout](#)
- [Language](#)
- [Side Bar](#)
- [Table: # of Lines Per Page](#)
- [# of Extra Lines](#)
- [Turn On/Off Explanations](#)
- [Turn On/Off Help Tip](#)
- [Popup window user selection](#)
- [Note Large Textbox](#)
- [Use Internal Email](#)

Calendar

- [Time Zone](#)
- [Default Day/Week/Month View](#)
- [12/24 Hour Display Mode](#)
- [Default Link Mode](#)
- [Display Reference Snapshot in Edit Mode](#)
- [Display Options: Weekends / Hours](#)

Task

- [Default Link Mode](#)

Organization / Contact

- [Default Link Mode](#)
- [Render Snapshot In Readonly Page](#)
- [Show Organization's Address in Contact](#)
- [Show Contact's Calendar/Task/Notes in Organization](#)
- [Skip Country Code](#)
- [Organization Snapshot Layout](#)
- [Contact Snapshot Layout](#)

Opportunity

- [Default Link Mode](#)
- [Popup window sales stage selection](#)
- [Receive Process Email Boomerang: \[Assigned\]\(#\) \[Due\]\(#\)](#)

Import / Export

- [Date/Time Format](#)

Sync

- [Sync Parameters](#)

Security

- [Switch Roles](#)

Reminder & Alert

- [Delivery Method](#)

Email

- [Setup Accounts](#)

Access Sharing

- [Setup Access Sharing](#)

Adding a Custom Field to a page is a 2 part process:

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

The screenshot shows the 'Sales Process Automation' software interface. The 'Account' menu is highlighted in a red box. Below it, the 'Custom Field' configuration options are listed in a red box:

- Organization
- Contact
- Opportunity
- Case
- Calendar
- Task
- Product
- Project
- Bug

Select the field types:

Features		114	Multiple String Values	Edit	<input type="checkbox"/>
Yes / No Checkbox		115	Yes/No Checkbox		<input type="checkbox"/>
Date		116	Date		<input type="checkbox"/>
Number		117	Number		<input type="checkbox"/>
Long Text		118	Long Text		<input type="checkbox"/>
Character String		119	Character String		<input type="checkbox"/>

Field Type: Multiple String Values

The screenshot shows the 'Features' field type configuration dialog box. It includes a list of features: Air, CD, Cruise, PWWPL, and Tilt. There are checkboxes for 'Show Updates' and 'Tilt'. The user 'Ted Wood' is logged in, and the 'Record Created' status is visible at the bottom.

Other field types:

The screenshot shows the configuration options for other field types:

- Yes / No Checkbox:
- Date: 10/01/2005 (format: YYYY.MON.DD)
- Number: 12345
- Long Text: long text
- Character String: [numbers or letters]

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

PWWPL		108	Character String	Edit	<input type="checkbox"/>
CD		109	Character String	Edit	<input type="checkbox"/>
Leather		110	Character String	Edit	<input type="checkbox"/>
Moon Roof		111	Character String	Edit	<input type="checkbox"/>
Extended Cab		112	Character String	Edit	<input type="checkbox"/>
Spec Wheels		113	Character String	Edit	<input type="checkbox"/>
		114	Character String	Edit	<input type="checkbox"/>
		115	Character String	Edit	<input type="checkbox"/>

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

The screenshot shows the 'Opportunity Detail' page. Three red boxes highlight specific areas:

- Box 1:** Located at the top right of the page, near the 'Layout' button and the 'Last Query' information.
- Box 2:** Located on the right side of the page, near the 'Update' button for the customer information.
- Box 3:** Located in the middle of the page, near the 'Custom Fields' section.

Area 1:

The screenshot shows the 'Page Layout Editor: Opportunity Fields' interface. It allows users to configure the layout of fields on the page. Key elements include:

- Setup For:** A dropdown menu with options: Company-Wide Setup, Company-Wide Setup (selected), Role: Sales Representative, Role: Sales Manager, and Role: Sales Administrator.
- Column Modes:** Radio buttons for '2 Column Mode' and '3 Column Mode' (selected).
- Columns:** Three columns (Column 1, Column 2, Column 3) where fields can be assigned. Each field has a 'Field' dropdown and a 'Label' text box.
- Field 1 (Column 1):** *Opportunity Name (Label: Opportunity Name), Customer Snapshot (Label: Customer), Customer (Updatable) (Label: Customer (update)).
- Field 2 (Column 2):** (Custom Field)Lead Priority (Label: Lead Priority), (Custom Field)Needs (Label: Needs), (Custom Field)Decision Maker (Label: Decision Maker), (Custom Field)Resources (Label: Resources).
- Field 3 (Column 3):** Sales Stage (Label: Sales Stage), Forecast Status (Label: Forecast Status), Win Probability (Label: Win Probability), Forecast Date (Label: Forecast Date).

Editing Page Layouts: Organization/ Contact / Opportunity Screen

Main Organization Contact Opportunities Forecast Tool Calendar Master Task **Account**

Company Setup

- Setup Wizard
 - Company Quick-Start Setup Wizard
 - Advanced Company Setup Wizard
- Organization / Contact
 - Setup Dropdown Menu Options
 - Setup Contact Relationship
 - Setup Page Layout
- Organization
 - Organization Detail Page: Main Section
 - Organization Detail Page: Subtabs
 - Organization Detail Page: Fields 1 Subtab
 - Organization Detail Page: Fields 2 Subtab
 - Organization Detail Page: Fields 3 Subtab
 - Organization Detail Page: Fields 4 Subtab
 - Organization Detail Page: Fields 5 Subtab
 - Organization Detail Page: Fields 6 Subtab
 - Organization Detail Page: Readonly View
 - Organization Create Page
- Contact
 - Contact Detail Page: Main Section
 - Contact Detail Page: Subtabs
 - Contact Detail Page: Fields 1 Subtab
 - Contact Detail Page: Fields 2 Subtab
 - Contact Detail Page: Fields 3 Subtab
 - Contact Detail Page: Fields 4 Subtab
 - Contact Detail Page: Fields 5 Subtab
 - Contact Detail Page: Fields 6 Subtab
 - Contact Detail Page: Readonly View
 - Contact Create Page
- Freeze Organization # After Creation

- Opportunity
- Setup Dropdown Menu Options
 - Setup Page Layout
- Opportunity
 - Opportunity Detail Page: Main Section
 - Opportunity Detail Page: Subtabs
 - Opportunity Detail Page: Fields 1 Subtab
 - Opportunity Detail Page: Fields 2 Subtab
 - Opportunity Detail Page: Fields 3 Subtab
 - Opportunity Detail Page: Fields 4 Subtab
 - Opportunity Detail Page: Fields 5 Subtab
 - Opportunity Detail Page: Fields 6 Subtab
 - Opportunity Detail Page: Readonly View
 - Opportunity Create Page
- Sales Process
 - Default Link Mode
 - Rules for Opportunity Sales Stage
- Organization Profile
- Organization Profile
- Outbound Email Setting
- Application help System URL
- Credit Card / Billing
- General / UI
- Page / UI
- Session Inactivity Timeout
- Language
- Side Bar
- Table: # of Lines Per Page
- # of Extra Lines
- Turn On/Off Explanations
- Turn On/Off Help Tip
- Popup window user selection
- Order views by view name
- Update Timestamp on Appointment/Task/Note
- Note Large Textbox
- Attachment Type
- CSV Output Separator
- CSV: Preserve Linebreak
- Calendar
- Setup Dropdown Menu Options
 - Time Zone
 - Default Close Status
- Freeze Task # After Creation
- ERP / Backend
- Product Unit Of Measurement
- Product/Category
- User Management
- Accounting Calendar Periods Setup
- Security
- Roles
- Access Control Profile
- Territory Access Engine
- Apply Territory Engine On Create
- Setup Identifying # Pool
- Organization/Contact #
- Opportunity #
- Quote #
- Task #
- Background Workflow Engine
- Calendar Reminder
- Territory Access Engine
- Opportunity To Product Interest
- # Opportunities
- Custom Field
- Organization
- Contact
- Support Portal
- Appointment
- Task

Page Layout Editor: Opportunity Fields

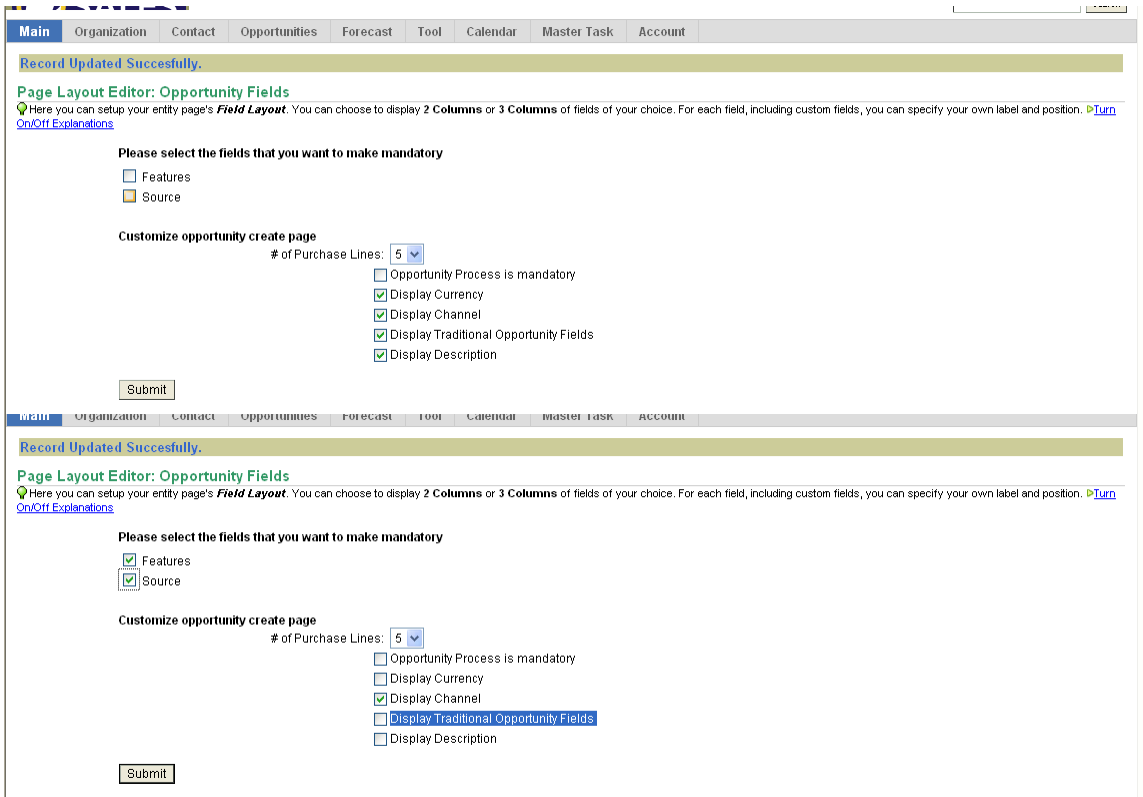
Here you can setup your entity page's **Field Layout**. You can choose to display 2 Columns or 3 Columns of fields of your choice. For each field, including custom fields, you can specify your own label and position. [Turn On/Off Explanations](#)

Setup For: Company-Wide Setup

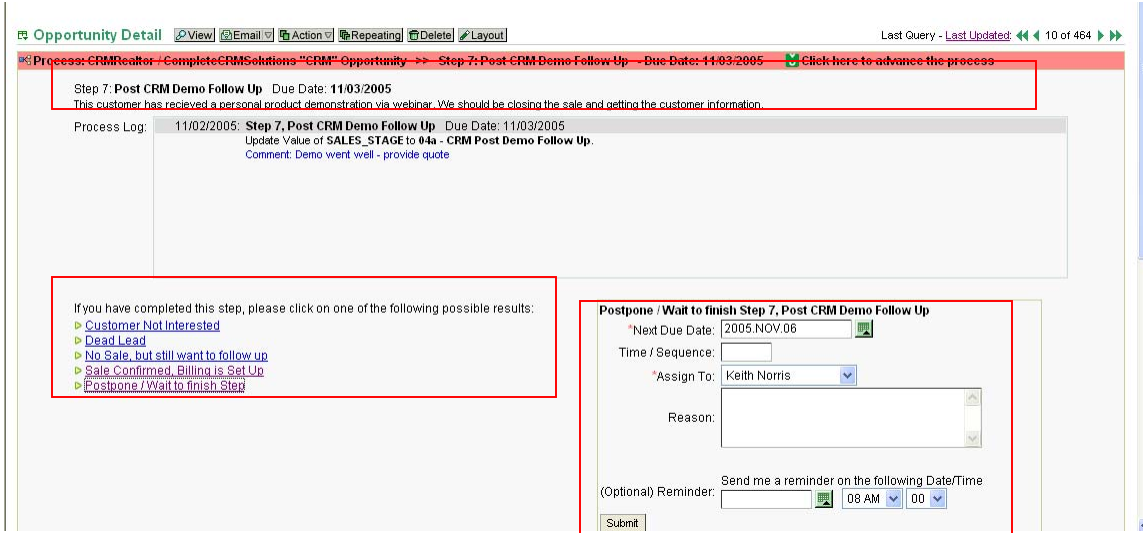
2 Column Mode
 3 Column Mode
 Clear All

Column 1	Column 2	Column 3
Field: (Custom Field)Features Label: Features	Field: Label:	Field: Label:
Field: (Custom Field)Source Label: Source	Field: Label:	Field: Label:
Field: Label:	Field: Label:	Field: Label:

Disallow user level customization
 Delete



3-Sales Processes



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

The screenshot shows the 'Account' setup page with a navigation menu at the top: Main, Organization, Contact, Opportunities, Forecast, Tool, Calendar, Master Task, and Account. The 'Account' menu is expanded, showing options like Setup, Preferences, Process Builder, User Administration, Product/Category, Import/Export, and Recycle Bin. The main content area is titled 'Company Setup' and includes sections for Setup Wizard, Organization / Contact, Opportunity, Organization Profile, General / UI, Calendar, Task, ERP / Backend, Security, Custom Field, and Email Templates. A red box highlights the 'Setup Wizard' section, and a yellow box highlights the 'Sales Process' sub-section under 'Opportunity', which lists various templates and options like 'Appointment Templates', 'Task Templates', 'Note Templates', and 'Email Templates'.

To Create a new Sales Process Click “Create New”

The screenshot shows the 'Processes' page with a navigation menu at the top: Main, Organization, Contact, Opportunities, Forecast, Tool, Calendar, Master Task, and Account. The 'Account' menu is expanded. The main content area is titled 'Processes' and includes a sub-header: 'Processes are flows or routines that you can define to automate your sales activities. Turn On/Off Explanations'. Below this is a table with columns: Name, Description, Type, Status, and Action. The table contains one entry: 'General Sales Process' with Type 'Opportunity' and Status 'Published'. Below the table is a 'Create New' button highlighted with a red box.

Name	Description	Type	Status	Action
General Sales Process		Opportunity	Published	Clone Access

Give the Process a Name

The screenshot shows the 'Create Process' form with a navigation menu at the top: Main, Organization, Contact, Opportunities, Forecast, Tool, Calendar, Master Task, and Account. The 'Account' menu is expanded. The main content area is titled 'Create Process' and includes a sub-header: 'expl_process_new Turn On/Off Explanations'. Below this is a form with the following fields: 'Process Type' (dropdown menu set to 'Opportunity'), '*Process Name' (text input field containing 'Car Sales Process'), and 'Description' (text area). A 'Create Process' button is located at the bottom of the form.

Car Sales Process (#3 Flow View) [Back to summary](#)

Process Name: Car Sales Process Process Type: Opportunity

Description: Status: Draft

steps | template | report

Step 1a: New Lead Created Edit
Update Value of SALES_STAGE to 00 - Preliminary.
Due in 0 Days.
Appointment Set: Branch to Step 2a, Appointment Follow up Call Scheduled: Branch to Step 1b, Follow up Call Dead Lead: Branch to Step 10a, Dead Lead
Step 1b: Follow up Call Edit
Update Value of SALES_STAGE to 01 - Prospecting.
Due in 1 Days.
Appointment Set: Branch to Step 2a, Appointment Follow up Call Scheduled: Branch to Step 1b, Follow up Call Dead Lead: Branch to Step 10a, Dead Lead
Step 1c: No Contact Edit
Step 2a: Appointment Edit
Step 2b: Did not show-Rescheduled Edit
Step 2c: Did not show- Not Rescheduled Edit

Add Step

#:

Name:

Description:

Start: Branched from another step

Due In:

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

Main | Organization | Contact | Opportunities | Forecast | Tool | Calendar | Master Task | **Account**

Car Sales Process (#3 Flow View) [Back to summary](#)

Process Name: Car Sales Process Process Type: Opportunity

Description: Status: Published

Draft
 Published

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

OPPORTUNITY>>NEW

Main | **Opportunities** | Account

Summary [New](#) [Views](#) [Reports](#)

Search: By Product

Bookmarks [Edit](#) [Add](#)

Today's Appointment

Latest Opportunities

test	11/03
Keith Norris- Phone in car buyer, Joe's big hair	11/03

Create Opportunity

*Opportunity Name: Opportunity #:

*Customer Name:

Forecast Date: (YYYY.MON.DD)

Sales Rep:

Purchase Line:	Product Category / Product	Qty	Amount
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Features:

Source:

*Lead Type:

*Sales Process:

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.

SALES Sales Process Automation

http://www.completecrmsolutions02.com/ozSslOVContactQC.jsp?custID--1

Contact Selection Popup - Quick Create

Quick Create:

Title:

*First Name: MI: *Last Name:

Phone: Home Phone ext.

Phone: Mobile Phone ext.

Phone: Voice Mail ext.

Email:

Address Type:

Address Line 1:

Address Line 2:

City:

State: Postal Code:

Country:

By hitting **Quick Create**, you are going to create a new Contact record, and also returning this newly created record to the parent window.

Creating New "VIEWS"

Main Organization Contact **Opportunities** Forecast Tool Calendar Master Task Account

Summary
New
Views

Reports

By Product
Search

re-defined, or user-defined 'List Definition'. It specifies exactly what data you want to see, and what fields you want to see in the list. Click on **Create New View** click on an existing View link to see **Update** the definition of that view. [Turn On/Off Explanations](#)

Show Disabled Views/Reports

Name	Description	Type
"A" Priority Opportunities		Published
Opportunities-Closed/ Dead		Published
Opportunities-Won		Published
Last Updated Opportunities		Published
"C" Priority Opportunities		Published
"B" Priority Opportunities		Published
All Opportunities		Global
All Opportunities (Updateable)		Global
All Opportunities (Sales Team)		Global

Click on *italic* headers to sort.

1 - 9 of 9

Recent Items
Hot List
Quick Search
Search by keyword
Opportunity
Search
Bookmarks
More Training
Today's Appointment
New Appointment
Latest Opportunities
Joe Smith 11/05/2005 11/05
test 11/03
Keith Norris- Phone in car buyer, Joe's big hair 11/03