

User Training Outline

“X” Menu

1. Dashboards

a. Create/Edit Dashboards, is where you can create graphs to view the information in your SalesNexus database at a glance. Each dashboard can hold a maximum of 9 graphs. So if you need 10 graphs, a new dashboard needs to be created to hold the additional graphs.

i. To make a new dashboard click the blue “+” and give the new dashboard a name

ii. To add graphs to a dashboard:

1. Select the dashboard from the list of dashboards

2. Select a Graph from the “Graphs” list; if none exist click the blue “+” next to “Graphs” and create one.

3. Choose what to Graph from the first dropdown, example “Campaign” (or another that makes sense to the customer)

4. Choose how to group the information, example “Campaign Name” (or another that makes sense to the customer)

5. Choose the amount of data to look at, example “Last Quarter”, and choose how to group the information, example “Clicked on” (or another that makes sense to the customer)

6. Choose the Graph Type, example “Basic Graph” (or another that makes sense to the customer)

7. We can further filter the data using the 3 filters at the bottom of the dashboard setup. For now we will leave those untouched. Click Save.

b. To view your dashboard go to “X” menu > Dashboards > and select your dashboard from the list.

2. With SalesNexus you have the ability to run Reports for Notes, Sales, Activities and even create custom reports. The reports offer a wide range of selections when generating a report. Let’s look at one scenario to give you a starting point for using the reports. (pick a scenario that makes sense for the customer and run a report based on their needs)

3. What is “My Record”

a. This is your personal contact record as a user of the SalesNexus system. It allows you to send email templates and campaigns to contacts in your system. Make sure it has a valid email address associated.

4. What are “My Settings”

a. This is where you can set your default landing page, for example you want to login and see your Task List right away. Select it from the “Set as Default”

- b. This is also where you set your Timezone. This will affect how time is displayed in the application locally. This should be set to your local timezone.
 - c. The settings for how Phone numbers are displayed can be changed from US to international. Use this if you need to store phone numbers for international contacts.
 - d. You can also set your default activity type. When you create a new task, are they normally phone calls? If so select Call from the list.
 - e. You can also setup Calendar sync and Voice over IP. Please use the detailed instructions on the SalesNexus website and reach out to our support team if you need assistance with those instructions
 - f. On mobile device, use fullsite by default - just means you will get the full site when logging into the website from your phone or tablet.
 - g. Bypass rollover screen at login - this option allows you to skip the "Task rollover screen" when you have Alarms turned on and have past due tasks. We will cover this in more detail later on in the Tasks section.
5. Help Me Now!
- a. Clicking this item will initiate a Live chat session with one of our knowledgeable support staff who will help you solve any issue you are experiencing while using the SalesNexus software.
6. Support
- a. Clicking this option will take you to our "Help" section on the SalesNexus Website where you can find How To guides and videos about how to do specific things when using SalesNexus

"Contacts" Menu

- 1. Create Contact
 - a. Use this option to create a new Contact for your Database. Fill in as much information as you have about the contact, and click Save
- 2. View All Contacts
 - a. This option shows you all of the contacts that have been added to your Database.
- 3. Send Email
 - a. Select this item if you want to send an email using the SalesNexus system. This allows you to select a Campaign that you have created, or just free flow a new message. When selecting a campaign the "Body" section will update with the Email Template associated with the specific Campaign.
- 4. Create Lookup
 - a. Lookups allow you to create an advanced search for contacts that can be viewed or added to campaigns.
 - i. Lookups allow you to Exclude records based on specific criteria by choosing a "Not" option before the criteria.
 - ii. By default the Lookup uses "AND" to join your criterias, if you would like to instead use the "OR" option for any additional criteria just select the

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- “OR” before adding the additional criteria. You can Mix both AND and OR together.
- iii. You have options to search based on “Contact”, “Sales”, or “Activity” values, and they can be used individually, or together. Each has its own section. To use them you will need to make sure that they are “Included” in your Lookup.
 - iv. Let's do a simple lookup for contacts that are part of a specific “State” and filter it by “City” (choose something that makes sense for the customers needs)
 - v. Click Search, the results are at the very bottom of the page
 - vi. To work with this set of search results, Click the “Make My Lookup” button
5. View Lookup
 - a. This is where you can see the Lookup that we created earlier. We will use this Lookup in a moment.
 6. Mail Merge - this allows you to send any template in the system to Word with information from the fields for a contact or lookup.
 7. Mail Labels - this allows you to make labels for sending paper mail.

“Campaigns” Menu

1. Create a Campaign
 - a. Let's create our first campaign together! Give it a name, Leave the subscription as default, we will skip 2nd tier for now and add a template.
 - b. Click Save and Begin, pick a start date and time (defaults to now), Select “Lookup”. This is the Lookup we made earlier.
 - c. Click Begin Campaign.
2. View Campaigns
 - a. Select the campaign and look at the stats for it, explain that email opens and clicks on links in the emails gets recorded in these stats
3. Create Template
 - a. Choose a template as a starting point. The pregenerated templates will use your company colors and logo as a starting point. These are set from the “X” menu by your administrator, using the “Company Profile” option
 - b. Clicking on a section of the template activates it for editing.
 - c. All changes you make to the template while editing are saved each time you “Submit” changes.
 - d. Send yourself Preview emails as you work on the template to ensure you have it setup correctly.
 - e. To send a template that includes contact information for the “Contact Record Manager” be sure to use the Mail Merge fields. (show the customer a sample we made for them based on their needs)
 - f. Feel free to reach out to support if you have problems creating or editing Templates.
4. View Templates

- a. Here you can see all the default templates and the ones you have created, and edit or view them individually. To view one expand the treeview on the right and select a template, then click the blue magnifying glass next to its name in the left, or to edit the Template click the “Pencil” icon.
5. Add to Campaign
 - a. This option allows you to add the selected Contact or Current Lookup to a campaign of your choice.
6. Add to Library
 - a. This allows you to add images or documents to your SalesNexus Library to use in templates.

“Tasks” Menu

1. View Task List
 - a. Here you can see all the tasks you have been assigned by the system or the ones you have made for yourself. These tasks are generated by the system when a user clicks a link in your email or when they open the email. You can also create these tasks for yourself.
2. Schedule Call
 - a. Pick a contact by searching their name or email address, choose a date and time, and the subject line of your task. You might even want some details, but those can also be filled in later. Next select the Alarm and priority, if needed, and then Save the task. You can see it is now part of your task list, and by clicking on the contact record you can see that it is also displayed on the contact’s Activities.
3. Schedule Meeting - recurring with attendees
 - a. Select a contact, by searching.
 - b. Choose the date and time for the meeting
 - c. From the “Options” choose “Recurring”
 - i. Select the times and dates to repeat the meeting
 - d. From the “Options” choose “Add Attendees”
 - i. Search for the Contact(s) you want to schedule the meeting with.
 - ii. Select them by clicking the “Checkbox” next to their name and click “Add Checked”
 - iii. You can add other users by simply clicking “My Team” and selecting the users you want to include
 - e. Add your subject line and details. If needed choose the Alarm and or Priority.
 - f. To email the Invitation, click the “Email Invitation”
 - g. You can also send the invitation using the Save & Email Template button. This will allow you to send the information to all the users on the invite and include an email template if needed.
4. Create a ToDo
 - a. Creating a ToDo is scheduled the same way as the previous tasks we have scheduled.
5. Log a Call

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- a. Use this option if you would like to enter information about a phone call that just came up.
 - i. Search for the Contact
 - ii. Enter the date and time (defaults to now)
 - iii. Enter subject of the call
 - iv. Enter details of the call
 - v. Choose the result
 - vi. Save the call, or save and schedule a follow up call, which allows you to schedule a task to call/meet with your contact later
6. View Calendar
 - a. In this view you can view all of your tasks as a calendar. It works very similar to your outlook calendar. You can schedule tasks by clicking anywhere in the calendar.
7. Turn Alarms On/Off
 - a. Using this option will activate alarms for the tasks that you have scheduled with Alarms. While using SalesNexus, if the time for your Alarmed task arrives the system will alert you.
8. Roll over past due
 - a. By clicking this you are telling the system to reschedule your past due tasks from yesterday to today.

“Opportunities” Menu

1. Create Opportunity
 - a. Search for the Contact you would like to create the opportunity for
 - b. The creation date is the date that you are creating this opportunity, but it is a modifiable field.
 - c. The Close is the date that the opportunity became a sale. This is used for reporting and for the Pipeline.
 - d. Units get multiplied by the Price
 - e. Amount is the Units multiplied by the Price
 - f. Choosing a stage for the opportunity allows for reporting on the different stages. Lets you see how close or far you are from turning the sale.
 - g. Record Manager is who owns the contact
 - h. You can associate the Opportunity with a Group, which in some customer systems is related to a company.
 - i. After creating the opportunity there will be some fields in the Right Layout that can be used to track information specific to your needs. (Show the customizations specific to this customer and based on their needs)
2. View Opportunities
 - a. From here you can search for the opportunity and filter the list of results by date, user, and status.
 - b. Clicking the blue “Magnifying Glass” next to the opportunity opens it for editing.
3. Email Quote

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- a. This option lets you send a Quote to the contact associated with the opportunity. (show the quote template)
 - b. The quote uses Mail Merge functionality so the opportunity contact information is filled automatically, as well as the user contact info.
4. View Sales Reports
 - a. From this option you can run reports about your sales Opportunities (depending on the customer's needs might show him a sample report)

“Notes” Menu

1. Create Note
 - a. This is where you can enter notes for your contacts. These notes will be displayed on the Contact's Note layout. To enter a note first, search for the contact by name, then enter the note and click save.
2. View Notes
 - a. This will show you a complete list of all of your notes in the system. This listing is searchable by contact and it can be filtered by any column header, date, and user.
3. View Note Reports
 - a. This is where you can see a report of all the notes using specific criteria. (based on customer requirements might need to show these reports)

“Groups” Menu

1. Create Group
 - a. This allows you to create a Group that users can be associated with, such as a company. Groups make sending Campaigns and communicating with specific contacts easier. It also adds another way to organize your contacts.
 - i. Fill in the Group Name at a Minimum
 - ii. Description - Optional
 - iii. Website - Optional
 - iv. Division - Optional
 - v. Region - Optional
 - vi. Click Save
 - b. To add a contact to the group:
 - i. Go to Contacts > Select or search the contact > Click the blue “Magnifying Glass”
 - ii. On the right layout panel choose “View this Contact's > Groups”
 - iii. Click See More Groups
 - iv. Search for the Group and click “Add”
2. View Groups
 - a. This is where you can see all the groups, edit and also delete them

“Quick” Action Menu

1. The “+” menu is a list of things you can create. It is designed as a place to quickly access some of the most frequent actions you might take in your DB. Currently this list isn't customizable

2. Calendar - This button
allows quick access to view your SalesNexus calendar

“Quick Search”

1. Allows for a quick search for items in your DB using the most common fields associated with those items. By choosing one of the fields to search on it will set it as your Default quick search. This will be retained across logins, and is user specific.