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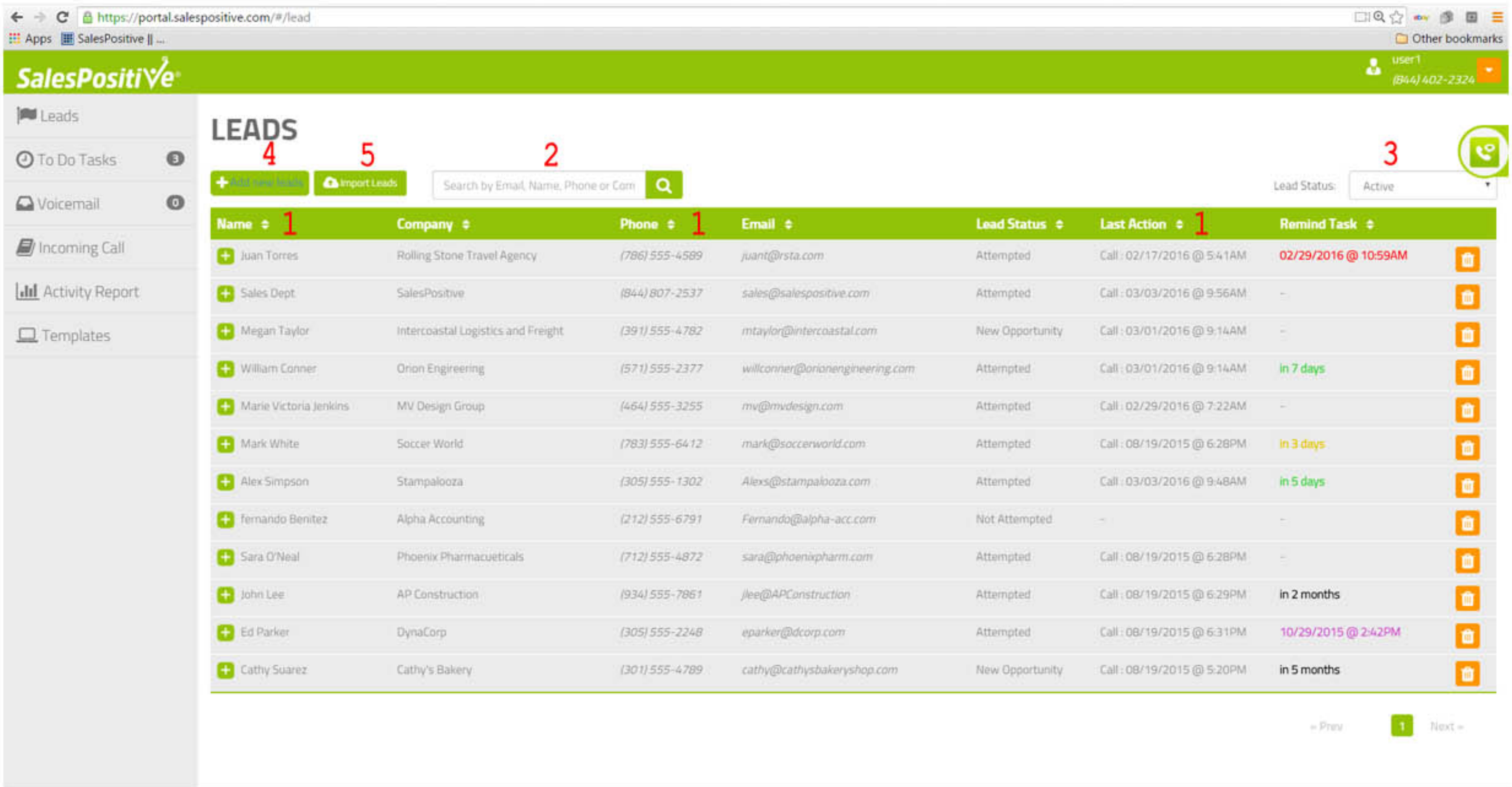
Quick Start Guide

Welcome to SalesPositive

Here is a quick guide to get you started.
If you have any questions, please be sure to contact us.

Collapsed Customer/Lead Profiles



Customer/Lead Profiles are collapsed by default. The collapsed state provides a summary of customer/lead information including: Contact Name, Company, Phone Number, Email, Last Activity, Reminders

1 All columns can be sorted alphabetically/numerically by pressing the sort button above the column

2 Search the name, company, phone, and email columns for the exact matches that you require

3 Leads can be filtered by status (ex attempted, new opportunity, disqualified). Note: active category does not display "non-active" statuses: disqualified, bad number, and do not contact

4 Create new leads by pressing the "add new lead button"

5 Import entire Lead/Customer lists by pressing the "Import Leads" button

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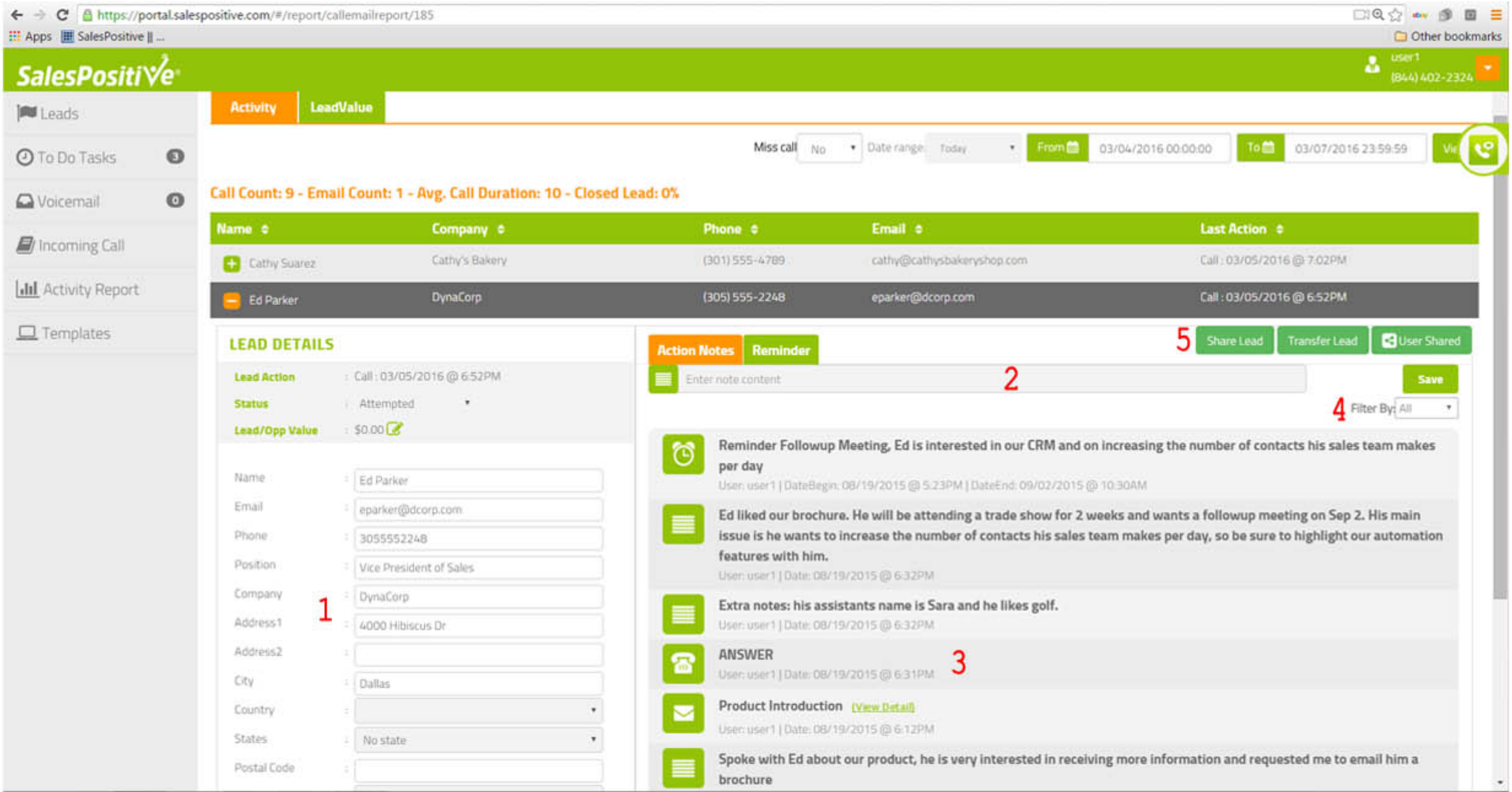
Action Notes (Expanded Profiles)



By clicking on the plus icon next to a lead you are able to access the expanded state of that Customer/Lead Profile. Here you can see additional information, take notes, and create reminders.

1 Update profile information by editing in the Lead Details section and pressing the save button

2 Enter notes in the notes bar and press save. The system will automatically catalogue who entered the notes and the time note was created.

3 Activity like Calls made, Emails sent, status changes, etc are catalogued automatically in the Action Notes section

4 You can filter the Action Notes section by: All/Activity/Notes

5 Transfer or Share leads with other users

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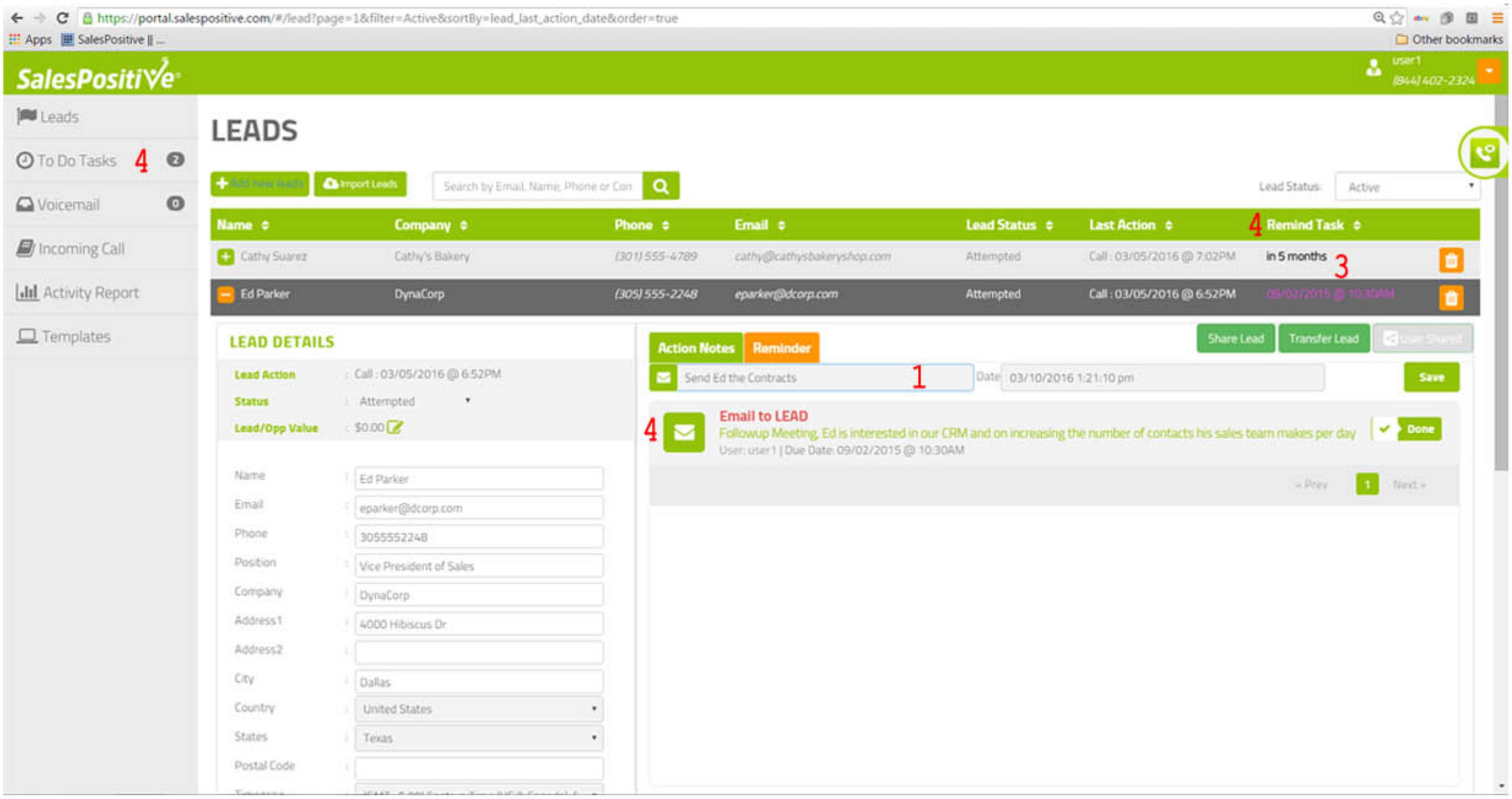
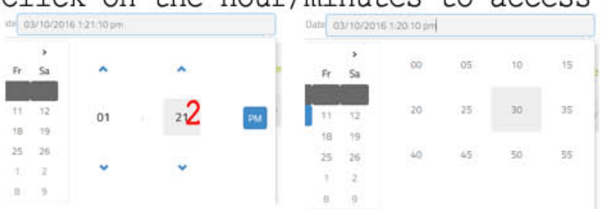
Set Reminders for upcoming events



1 Create a brief description for the reminder and the set the date/time.

2 Click on the hour/minutes to access a shortcut (to selfaster than scrolling up and down)



3 Reminders are color coded: yellow - due within 4 days, green - due within 7 days, black - due in more than 1 week, red - expired, purple - expired by more than 2 weeks

4 Reminders can be viewed: in the Reminders column, in the reminder tab for individual lead/customer profiles, or in the To Do Task Section

5 In the To Do Task Section. Use the To and From calenders to search for reminders that are happening during specific time periods (ex view reminders that are due between March 1st to March 15th)

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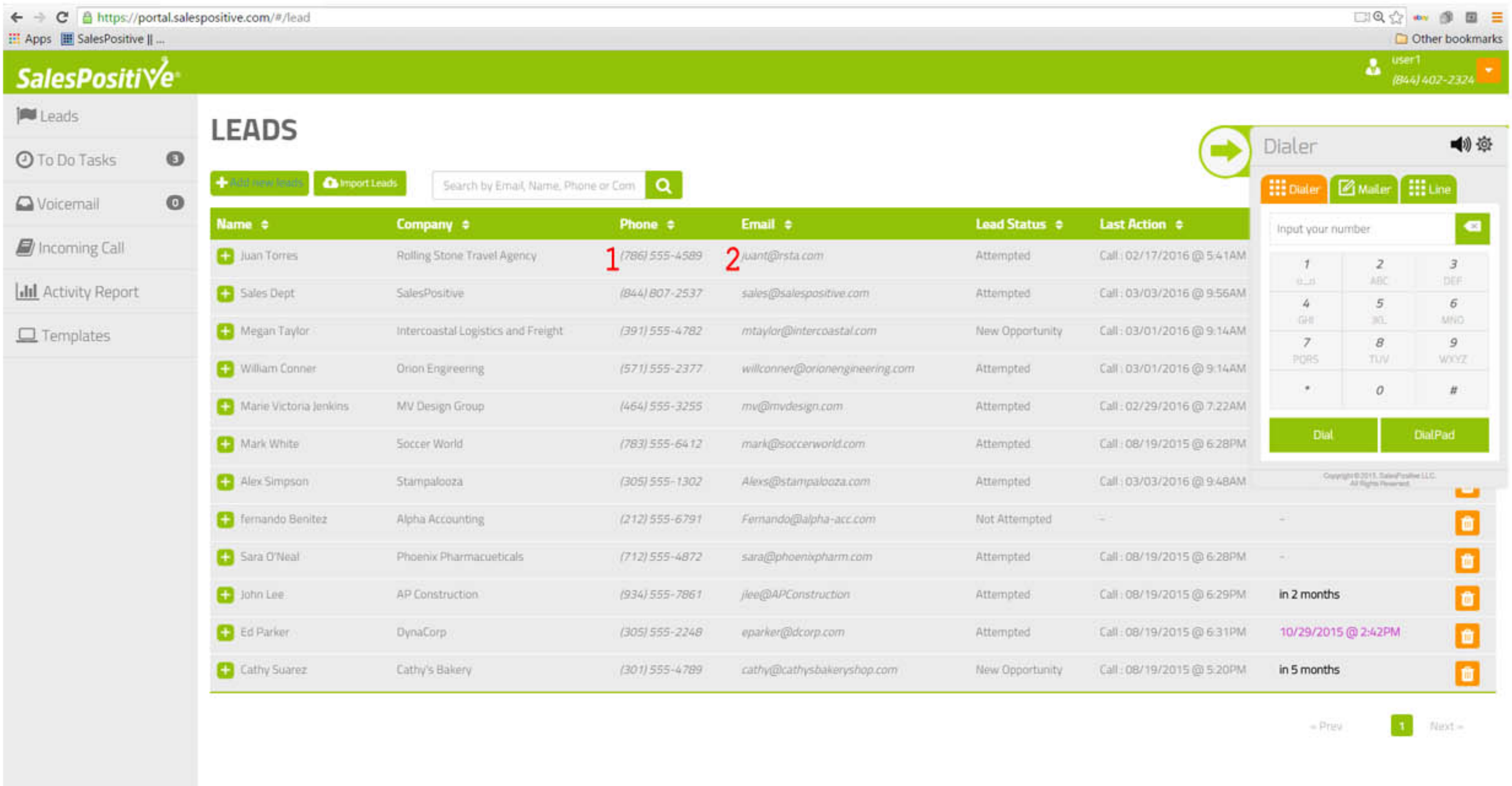
Dialer



1 Click to Dial - Click on a phone number to automatically dial that number

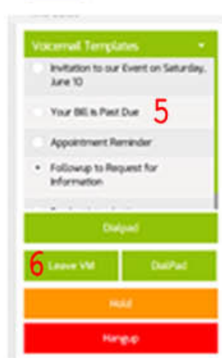
2 Click to email - Click on a email address to send an email. The mailer window will open.

3 Select the email template that you want to send. All necessary fields (from email, subject, content) will be generated

4 Make any edits to the content and press send

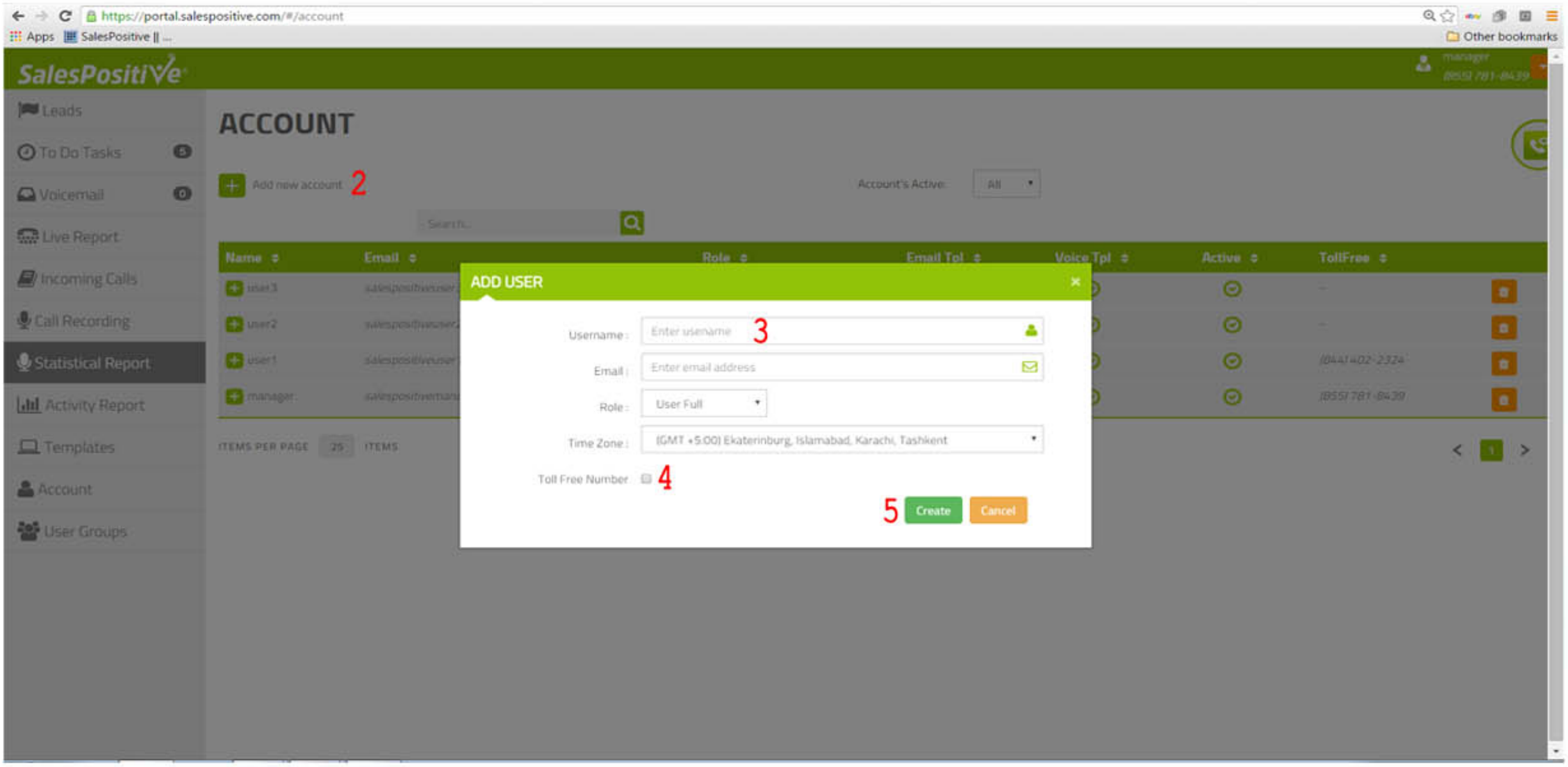
5 Click to Voicemail - During a call press the Voicemail Templates button and select desired Voicemail template

6 Press the Leave VM button after the prompt ("Please leave a message *beep*"). The system will hang up the call and leave the message for you, during this time you are free to make more calls.



7 To Learn how to create templates, please view our VM Template and Email Template Guides.

Creating Accounts



1 Only Admin accounts can create or delete accounts

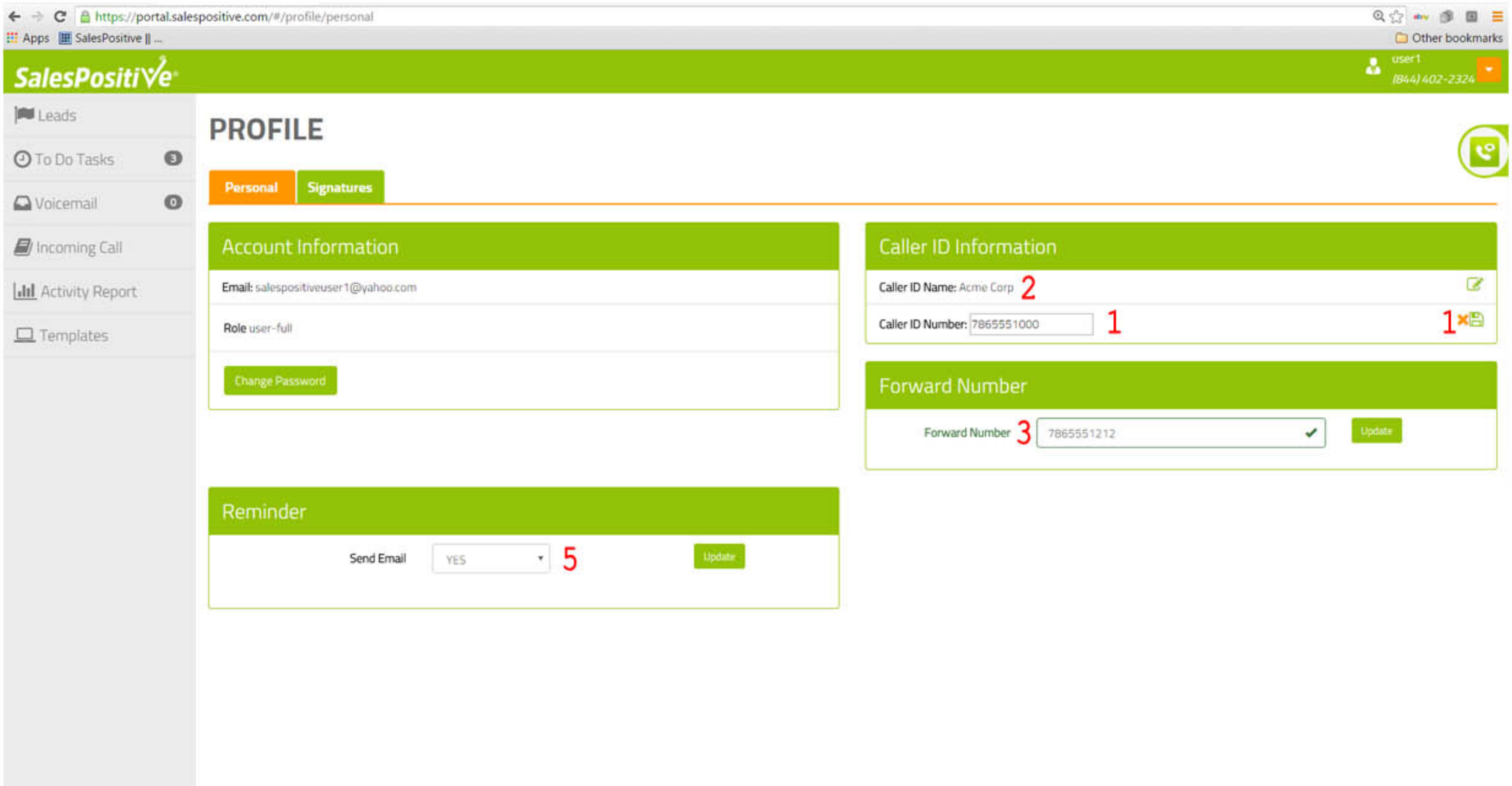
2 Go to the Accounts section and select "add new account"

3 Enter the login name and email for the new user

4 Check the toll free number checkbox to create an incoming phone number for that user

5 Press create. The system will send an email with setup instructions to the new user.

Profile options



1 This is the number that will display on the receiving person’s Caller ID when you make an outgoing call. You can select any number you want. Edit it by pressing the edit button.

2 This is the name that will display on the receiving person’s Caller ID when you make an outgoing call. You can select any name you want. Edit it by pressing the edit button. Note: not all phone carriers allow this feature, if they do not the name that will appear will be the name that is attached to the phone number (that you selected) in the Caller ID database

3 Any incoming calls to your SalesPositive toll free phone number will be forwarded to this number.

4 Set the time zone for your account. All time stamps will be saved using this time zone.

5 Reminders send “reminders” to your email, turn this feature off and on.