



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

LEADS

4 5 2 3

+ Add New Leads Import Leads Search by Email, Name, Phone or Com

Name	Company	Phone	Email	Lead Status	Last Action	Remind Task
Juan Torres	Rolling Stone Travel Agency	(786) 555-4589	juant@rsta.com	Attempted	Call : 02/17/2016 @ 5:41AM	02/29/2016 @ 10:59AM
Sales Dept.	SalesPositive	(844) 807-2537	sales@salespositive.com	Attempted	Call : 03/03/2016 @ 9:56AM	-
Megan Taylor	Intercoastal Logistics and Freight	(391) 555-4782	mtaylor@intercoastal.com	New Opportunity	Call : 03/01/2016 @ 9:14AM	-
William Conner	Orion Engineering	(571) 555-2377	willconner@orionengineering.com	Attempted	Call : 03/01/2016 @ 9:14AM	in 7 days
Marie Victoria Jenkins	MV Design Group	(464) 555-3255	mv@mvdsgn.com	Attempted	Call : 02/29/2016 @ 7:22AM	-
Mark White	Soccer World	(783) 555-6412	mark@soccerworld.com	Attempted	Call : 08/19/2015 @ 6:28PM	in 3 days
Alex Simpson	Stampalooza	(305) 555-1302	Alex@stampalooza.com	Attempted	Call : 03/03/2016 @ 9:48AM	in 5 days
Fernando Benitez	Alpha Accounting	(212) 555-6791	Fernando@alpha-acc.com	Not Attempted	-	-
Sara O'Neal	Phoenix Pharmaceuticals	(712) 555-4872	sara@phoenixpharm.com	Attempted	Call : 08/19/2015 @ 6:28PM	-
John Lee	AP Construction	(934) 555-7861	jlee@APConstruction.com	Attempted	Call : 08/19/2015 @ 6:29PM	in 2 months
Ed Parker	DynaCorp	(305) 555-2248	eparker@dcorp.com	Attempted	Call : 08/19/2015 @ 6:31PM	10/29/2015 @ 2:42PM
Cathy Suarez	Cathy's Bakery	(301) 555-4789	cathy@cathysbakeryshop.com	New Opportunity	Call : 08/19/2015 @ 5:20PM	in 5 months

= Prev 1 Next =

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

Action Notes (Expanded Profiles)

The screenshot displays the SalesPositive CRM interface. On the left, a sidebar contains navigation options: Leads, To Do Tasks (3), Voicemail (0), Incoming Call, Activity Report, and Templates. The main header shows 'SalesPositive' and user information: 'user1 (844) 402-2324'. Below the header, there are tabs for 'Activity' and 'LeadValue'. A summary bar indicates 'Call Count: 9 - Email Count: 1 - Avg. Call Duration: 10 - Closed Lead: 0%'. A table lists leads with columns for Name, Company, Phone, Email, and Last Action. Two leads are visible: Cathy Suarez (Cathy's Bakery) and Ed Parker (DynaCorp). The 'LEAD DETAILS' section for Ed Parker is expanded, showing fields for Name, Email, Phone, Position, Company, Address1, Address2, City, Country, States, and Postal Code. A red '1' is placed next to the Company field. To the right, the 'Action Notes' section is active, showing a list of notes with a red '2' in the input field and a red '3' next to an 'ANSWER' note. A red '4' is placed next to the 'Filter By' dropdown, and a red '5' is placed next to the 'Share Lead' button.

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

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)

Dialer

The screenshot shows the SalesPositive web interface. On the left is a navigation menu with options: Leads, To Do Tasks (3), Voicemail (0), Incoming Call, Activity Report, and Templates. The main area is titled 'LEADS' and contains a table of lead information. A dialer overlay is visible on the right side of the screen.

Name	Company	Phone	Email	Lead Status	Last Action
Juan Torres	Rolling Stone Travel Agency	1 (786) 555-4589	2 juant@rsta.com	Attempted	Call : 02/17/2016 @ 5:41AM
Sales Dept	SalesPositive	(844) 807-2537	sales@salespositive.com	Attempted	Call : 03/03/2016 @ 9:56AM
Megan Taylor	Intercoastal Logistics and Freight	(391) 555-4782	mtaylor@intercoastal.com	New Opportunity	Call : 03/01/2016 @ 9:14AM
William Conner	Orion Engineering	(571) 555-2377	willconner@orionengineering.com	Attempted	Call : 03/01/2016 @ 9:14AM
Marie Victoria Jenkins	MV Design Group	(464) 555-3255	mv@mvdesign.com	Attempted	Call : 02/29/2016 @ 7:22AM
Mark White	Soccer World	(783) 555-6412	mark@soccerworld.com	Attempted	Call : 08/19/2015 @ 6:28PM
Alex Simpson	Stampalooza	(305) 555-1302	Alexs@stampalooza.com	Attempted	Call : 03/03/2016 @ 9:48AM
fernando Benitez	Alpha Accounting	(212) 555-6791	Fernando@alpha-acc.com	Not Attempted	-
Sara O'Neal	Phoenix Pharmaceuticals	(712) 555-4872	sara@phoenixpharm.com	Attempted	Call : 08/19/2015 @ 6:28PM
John Lee	AP Construction	(934) 555-7861	jlee@APConstruction	Attempted	Call : 08/19/2015 @ 6:29PM in 2 months
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- 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

The first screenshot shows the 'Product Intro' and 'Sales Call Followup' email templates. The second screenshot shows the email content editor with a pre-filled message body.

- 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.

The screenshot shows the 'Voicemail Templates' interface with a list of templates and buttons for 'Leave VM', 'DialPad', 'Hold', and 'Hangup'.

Creating Accounts

The screenshot shows the SalesPositive web portal interface. The main page is titled "ACCOUNT" and features a sidebar with navigation options like Leads, To Do Tasks, Voicemail, Live Report, Incoming Calls, Call Recording, Statistical Report, Activity Report, Templates, Account, and User Groups. A table lists existing users with columns for Name, Email, Role, Email Tol, Voice Tpl, Active, and TollFree. A modal window titled "ADD USER" is open, containing the following fields:

- Username: Enter username (3)
- Email: Enter email address
- Role: User Full
- Time Zone: (GMT +5:00) Ekaterinburg, Islamabad, Karachi, Tashkent
- Toll Free Number: (4)

At the bottom of the modal are "Create" and "Cancel" buttons (5).

- 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

PROFILE

Personal Signatures

Account Information

Email: salespositiveuser1@yahoo.com

Role: user -full

Change Password

Caller ID Information

Caller ID Name: Acme Corp 2

Caller ID Number: 7865551000 1

Forward Number

Forward Number 3 7865551212 Update

Reminder

Send Email YES 5 Update

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.