

SCHOOLEY MITCHELL

CRM Manual

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CRM UI

Glossary

Term	Definition	Comments
Pin	For broad pages or sections (ie. clients, client registry, leads)	
Favourite	For specific examples (ie. an individual client, lead, or opportunity page)	

Objectives

Add shortcuts for pages and actions.

Managing Pinned Pages

Adding a Pinned Page

1. From the sub-menu on the left-hand side of the screen, select the broad page you want to pin.
2. From the right-hand side of the screen, select the **push-pin** icon to pin the page to the top bar of the screen.

Viewing a Pinned Page

From the bar at the top of the screen, select the pinned page to visit it.

Managing Favourited Pages

Adding a Favourite Page

1. From the sub-menu on the left-hand side of the screen, select the specific page you want to favourite.
2. From the right-hand side of the screen, select the **star** icon to add the page to your favourites list.

Viewing a Favourited Page

1. From the bar at the top of the screen, select the **three bars** then select **Favourites** to open your favorited pages list.

Managing the Sidebar

1. From the bottom right-hand side of the screen, select the **left-facing arrow** icon to open the Sidebar.
2. From the bottom right-hand side of the Sidebar, select the **plus** icon to open the Sidebar Widgets pop-up.
3. In the **Sidebar Widgets** pop-up, select **Add** to add the widget in order of preference:
    a. **Recent Emails**: Shows your most recent emails.
    b. **Sticky Note**: Allows you to add and modify short notes.
    c. **Task List**: Displays your current tasks in order of due date.
        i. You can select the name of the task to open the associated Tasks page.
4. From the widget box, select the **three dots** to open the widget settings:
    a. **Refresh**: Refresh the widget to show any newly added tasks or recently received emails.
    b. **Configure**: Change the number, folder, and default action displayed on the widget.
    c. **Edit**: Edit the sticky note content.
    d. **Remove**: Permanently remove the widget from the Sidebar.

Dashboards

Locating Dashboards

1. From the menu at the top of the screen, select the **CRM** tab to open the new Customer Relationship Management system.
2. Navigate to the menu on the left-hand side of the screen and select **the Schooley Mitchell** icon to open the Dashboards.

Dashboards

Objectives

1. Access your dashboard.
2. Customize your dashboard.

Managing Your Dashboards

1. From the Dashboards page, select the **arrow** beside the Dashboards field to open a drop down of your existing dashboards.

Note: Your dashboard will be the default homepage when you log into the CRM.

Access the Dashboards List

1. From the Dashboards, select **Tools**, then select **Edit** to open the Manage Dashboards page for the chosen Dashboard.
2. Select **Manage Dashboards** to open the All Dashboards list.
3. From the **All Dashboards** list, select the dashboard **Label** to open the Dashboard page.

Creating a Dashboard

From the Dashboard Page

1. From the Dashboards, select **Tools**, then select **Create** to open the Create Dashboard page.
2. Complete the following **General Information** details:
    a. **Label**: The title of the dashboard.
    b. **Owner**: The owner of the dashboard.
        i. This will auto-populate with your account name but can be changed to a subcontractor.
    c. **Clone From**: to clone the widgets and information from an existing dashboard.
        i. This is a non-mandatory field, but can be useful for creating identical dashboards for different sub-contractors, days, verticals, etc.
3. In the top right-hand said of the screen, select the **arrow** beside Save and Close to open a dropdown list of save options:
    a. **Save and Close**: Save the dashboard, close the Create Dashboard page, and return to the All Dashboards list.
    b. **Save and New**: Save the dashboard and open a new Create Dashboard page.
    c. **Save**: Save the dashboard and remain in the Create Dashboard page.

From the All Dashboards List

1. From the Dashboards, select **Tools**, then select Edit to open the Manage Dashboards page for the chosen Dashboard.
2. Select **Manage Dashboards** to open the All Dashboards list.
3. From the right-hand side of the screen, select **Create Dashboard** to create a new dashboard.

4. Complete the following **General Information** details:
    a. **Label**: The title of the dashboard.
    b. **Owner**: The owner of the dashboard.
        i. This will auto-populate with your account name but can be changed to a subcontractor.
    c. **Clone From**: to clone the widgets and information from an existing dashboard.
        i. This is a non-mandatory field, but can be useful for creating identical dashboards for different sub-contractors, days, verticals, etc.
5. In the top right-hand said of the screen, select the **arrow** beside Save and Close to open a dropdown list of save options:
    a. **Save and Close**: Save the dashboard, close the Create Dashboard page, and return to the All Dashboards list.
    b. **Save and New**: Save the dashboard and open a new Create Dashboard page.
    c. **Save**: Save the dashboard and remain in the Create Dashboard page.

Customizing a Dashboard

1. From the Dashboards, select **Add Widget** to open the Dashboard Widgets pop-up.
2. From the **Dashboard Widgets** list, select **Add** to add the widget to your dashboard:
    a. **Recent Emails**: Displays the most recent additions to your inbox and outbox.
    b. **Quick Launchpad**: Quick links to jump to frequently used actions and pages Client List, Leads, Contacts, and Opportunities.
        i. This will take you away from the dashboard into the respective areas of the CRM.
    c. **Today's Calendar**: Displays today's calendar.
    d. **Recently Accessed Contacts**: Displays the list of recently accessed contacts.
    e. **Recent Calls**: Displays the list of recently logged calls.
        i. Calls are logged manually.
    f. **Opportunities By Lead Source**: Displays a breakdown of existing opportunities by Lead source in the form of a pie chart.
    g. **Opportunities By Status**: Displays a breakdown of existing opportunities in the form of a bar chart.
        i. Prospects,
        ii. Research,
        iii. Briefing,
        iv. Follow Up Meetings/Discussions,
        v. Service Agreement,
        vi. SA-Sign Off,
        vii. Submitted for Production, and
        viii. Lost.
    h. **Campaign Leads**: Displays the number of leads generated by the most recently created campaigns in the form of a bar chart.
    i. **Opportunities Generating Campaigns**: Displays the campaigns that generate the biggest numbers of opportunities.
    j. **Campaigns By Close Revenue**: Displays the campaigns that generate the most revenue.
    k. **Average Lifetime Sales**: Displays the average lifetime sales based on Post Audit data.
    l. **Opportunities List**: Displays the list of opportunities.
        i. This can be configured to show only opportunities in certain conditions, e.g. only open opportunities that are owned by the current user.
    m. **Leads List**: Displays the list of leads.
        i. This can be configured to show only leads in certain conditions, e.g. only open leads that are owned by the current user.

Configuring a Widget

1. From the Dashboards, locate the widget you wish to configure.

Note: Not all widgets offer the same configuration settings.

2. From the right-hand side of the widget, select the **three dots** then select **Configure** to open the Configuration pop-up.
3. In the **Configuration** pop-up, complete or edit the following information details:
    a. **Widget title**: The title of the widget.
        i. This can be customized by de-selecting the Use default checkbox.
    b. **Owner**: The owner of the lead, client, or opportunity.
        i. This can be assigned to your account or a subcontractor.
    c. **Date range**: Limits the data to pull only from items added during the date range.
    d. **Excluded sources**: Removes specific lead sources from the data pool.
    e. **Excluded statuses**: Removes specific lead or opportunity statuses from the data pool.
    f. **Display data**: The type of data shown in the chart.
        i. **Count**: Displays the number of items per source or status.
        ii. **Amount**: Displays the total budget percentage of items per source or status.
    g. **Sort By**: Sorts the list by a specific data field.
        i. **Ascending**: Arrange the data from smallest to largest, A to Z, or oldest/earliest to newest/most recent.
        ii. **Descending**: Arrange the data largest to smallest, Z to A, or newest/most recent to oldest/earliest.
4. Select **Save** to save the configured widget settings.

Clients

Glossary

Term	Definition	Comments
Business	Any potential prospect or entity with whom you may want to pursue a professional relationship.	Businesses are only visible to your office. To protect them as a client, they must be made Temporary.
Temporary Client	A prospect or entity you are actively pursuing as a client to which you will be presenting a Service Agreement.	There are rules regarding protecting a client in temporary status to keep things fair between offices.
Permanent Client	A client who has signed a Service Agreement.	Permanent clients are protected as a permanent client for the term of the Service Agreement plus one year.
Source	A referral source, either a networking group or partner, used for client gain and business growth.	Networking groups can include Leads groups or a Chamber of Commerce. Referral partners can be paid or unpaid.

Locating Clients

3. From the menu at the top of the screen, select the **CRM** tab to open the new Customer Relationship Management system.
4. Navigate to the menu on the left-hand side of the screen and select **Clients** to open the sub-menu.

Clients

<u>Objectives</u>

3. Add temporary clients to the client registry.
4. Filter your client list.
5. Make clients permanent in the client registry.

<u>Adding to the Client Registry</u>

2. From the sub-menu, select **Clients** to open your client list.
3. From the right-hand side of the screen, select **Create Client** to open the New Client page.
4. Complete the following **General** information details:
    a. **Company Type**: Marks what type of client this is for the registry
        i. **Permanent**: Client who has a signed Service Agreement.
        ii. **Temporary**: Prospect without a signed Service Agreement but in discussion with the franchisee.
            1. This will be the default company type for most new clients, as the prospect must be temporary before it can be made permanent.

   iii. **Business**: Any potential prospect or entity with whom you may want to pursue a professional relationship.
   iv. **Referral**: Client is a referral source but is not signing a Service Agreement. This blocks off the client in the registry from other franchisees.
- **b. Industry**: Primary industry the business or client operates in.
- **c. Client Name**: Full, legal or Doing Business As name of the business or client.
   i. Select **Check Conflict** to check the name against the current registry.
- **d. Location**: Primary location of the business or client.

5. Once all mandatory fields listed above are completed, select **Check Conflict** to check your client information against the existing Client Registry.
6. In the **Source** field, select the source of the business or client.
   a. Select **Add New** to add a new Source type to the client.
7. In the **Tags** field, select **Add New** to add office-specific tags to your clients.
   a. For example, industry, hot versus cold, business type, ownership, etc.
8. In the **Contacts** section, select the plus sign to add a new contact.
9. Complete the following **Contact – New Contact** details:
   a. First name,
   b. Email address, which can be check for a conflicting or existing contact, and
   c. Select **Save** to save the contact.
10. In the **Sub Locations** section, select the plus icon to open the Sub Location pop-up.
11. Complete the following **Sub Location** information details:
    a. Operating Name,
    b. Street Address,
    c. City,
    d. State/province,
    e. Country, and
    f. Zip/Postal Code.
12. Under the Operating Name, select **Check Conflict** to check the sub location client information against the existing Client Registry.
13. Select **Save** to save the sub location to the client profile.
14. In the top right-hand said of the screen, select the **arrow** beside Save and View to open a dropdown list of save options:
    - **a. Save and View**: Save the client and view the client overview.
    - **b. Save**: Save the client and remain in the editable client profile.
    - **c. Cancel**: Stop adding a new client and return to the All Clients list.

<u>Accessing Your Client List</u>

15. From the sub-menu, select **Clients** to open your client list.
16. Select the small arrow beside **Client Status** to open a dropdown:
    - **a. Active**: Includes all clients under an active protection period.
    - **b. Archived**: Includes all clients that have been archived from the list.
    - **c. Expired**: Includes all clients whose protection period or Service Agreement has expired.
17. Select the small arrow beside **Client Type** to open a dropdown:
    - **a. All**: Permanent and temporary clients.
      i. This is the default Client Type.
    - **b. Permanent**: Client who has a signed Service Agreement.
    - **c. Temporary**: Client without a signed Service Agreement but in discussion with the franchisee.
18. Select the **Client Name** to open the **Client Information** panel.
19. From the menu on the right-hand side of the screen, select the single-arrow icon to **Refresh** the list.

20. From the menu on the right-hand side of the screen, select the double-arrow icon to **Reset** the filters between searches.
21. From the right-hand side of the screen, select the box and pencil icon to **Edit** the client.

Navigating Clients Filters

1. From the sub-menu, select **Clients** to open your client list.
2. From the menu on the right-hand side of the screen, select the T-shaped icon to open the **Filter Toggle**.
3. Select the small arrow beside **Client Status** to open a dropdown:
    a. **Active**: Includes all clients under an active protection period.
        i. This is the default Client Status.
    b. **Archived**: Includes all clients that have been archived from the list.
    c. **Expired**: Includes all clients whose protection period or Service Agreement has expired.
4. Select the small arrow beside **Client Type** to open a dropdown:
    a. **All**: Permanent and temporary clients.
        i. This is the default Client Type.
    b. **Permanent**: Client who has a signed Service Agreement.
    c. **Temporary**: Client without a signed Service Agreement but in discussion with the franchisee.
5. Select the small arrow beside **Client name** to open the search field.
    a. There are a variety of search criteria options available; however, **Contains** is recommended.

Saving Custom Filters

1. From the sub-menu, select **Clients** to open your client list.
2. From the menu on the right-hand side of the screen, select the T-shaped icon to open the **Filter Toggle**.
3. Select your preferred or specific filter criteria from the available filters.
4. From the top-left hand side of the screen, select **Options** then select **Save As** to open the Grid view pop-up.
5. In **Grid view**, add a name for your custom filter set.
    a. Select the **Set as default** checkbox if you want this custom filter set to be the default grid view.
6. Select **Save** to save your custom filters.

Navigating the Client Profile

Removing the Active Status

1. From the sub-menu, select **Clients** to open your client list.
2. Select the **Client Name** to open the client overview.
3. The **General** section contains all the client details provided during the creation stage.
4. From the top-right hand side of the screen, select **Edit** to open the client profile.
5. From the top-right hand side of the screen, select **Save and View** to open the dropdown:
    a. **Archive**: Move the client into Archived status.
    b. **Delete**: To permanently remove the client from the system.

Accessing the Actions

1. From the sub-menu, select **Clients** to open your client list.
2. Select the **Client Name** to open the client overview.
3. The **General** section contains all the client details provided during the creation stage.
4. From the top-right hand side of the screen, select **More Actions** to open the actions dropdown:
    a. **Add note**: Allows you to add a note to the lead profile.
    b. **Send email**: Generates an email draft page with built-in email templates.

c. **Add event**: Allows you to add an event to your calendar.
d. **Log call**: Allows you to log a call had with the lead.
e. **Add task**: Allows you to add a task related to the lead to your Task page.
f. **Add contact**: Allows you to add a new contact to your Contacts page.
g. **Create Opportunity**: Allows you to add the client as an Opportunity to your Opportunities page.

Navigating a Permanent Client

Making a Client Permanent

1. From the sub-menu, select **Clients** to open your client list.
2. Select the **Client Name** to open the client overview.
3. From the top-right hand side of the screen, select **Edit** to open the client profile.
4. In the Company Type field, select **Permanent** from the drop down to change the client's status.
5. In the **Documents** section, beside the **Service Agreements** field, select the plus sign to open the Upload Service Agreement pop-up.
6. In the **Upload Service Agreement** pop-up, complete the following information details:
    a. **File**: Upload the signed Service Agreement.
    b. **ACA**: If the Service Agreement has a Utilities addendum.
    c. **Cost Categories**: Select all cost categories the client has agreed to services for.
    d. **SA Date**: The date the Service Agreement was signed by the client.
    e. **Expiry Date**: Auto-fills based on the SA Date and Term of Agreement.
    f. **Reminder**: Notice before the SA expires.
7. Select **Save** to finish uploading the signed Service Agreement.
8. In the top right-hand said of the screen, select the **arrow** beside Save and View to open a dropdown list of save options:
    a. **Save and View**: Save the client and view the client overview.
    b. **Save**: Save the client and remain in the editable client profile.

Accessing Production Tracking

1. From the sub-menu, select **Clients** to open your client list.
2. Select the **Client Name** to open the client overview.
3. In the **PT Files** section, select Load PT files to see the production overview information:
    a. Cost category,
    b. Status,
    c. Analyst, and
    d. Note.
4. In the **PT Files** section, select **Go to Production Tracking** to open the production pane for the client.

Exporting and Importing Files

Export Your Clients List

1. From the menu on the right-hand side of the screen, select **Export** to start the export.

Export the Clients Grid

1. From the left-hand side of the screen, select **Export Grid** and choose the preferred method - CSV or XLSX – from the dropdown.

Import Files to Your Clients List

1. From the menu on the right-hand side of the screen, select **Import file** to open the Import pop-up.
2. If you have not mapped your list to the Import Template, select **Download Import Template** and fill in your lead information.
3. Once the Import Template is complete, select **Choose File** to select the correct import list.
4. Select **Validate** to have the information Validated by the system.
5. Once validation is complete, select **Import file** to begin the import process.

Contacts

Objectives

1. Add a contact.
2. Filter the Contacts list.

Adding to the Contacts List

1. From the sub-menu, select **Contacts** to open the contacts list.
2. From the menu on the right-hand side of the screen, select **Create Contact** to add a new contact.
3. Complete the following **Contact Information** details:
    a. First name,
    b. Last name, and
    c. Email address.
4. Select **Check Email** to check the contact email against the existing Contacts list.
5. In the **Connection** section, you can associate the contact with an existing client using the **Clients** dropdown.
6. In the **Distinctive Values** section, you can add personal and business DV tags to identify common interests, business topics, cost categories, events, and industries related to the contact.
    a. DV tags are used to build Group Email filters.
7. In the top right-hand said of the screen, select the **arrow** beside Save and View to open a dropdown list of save options:
    a. Save and View: Save the client and view the contact overview.
    b. Save: Save the client and remain in the editable contact profile.
    c. Cancel: Stop adding a new client and return to the All Contacts list.

Navigating the Contacts List

Adding Filters

1. From the sub-menu, select **Contacts** to open your client list.
2. From the menu on the right-hand side of the screen, select the T-shaped icon to open the **Filter Toggle**.
3. Select the small arrow beside **First name** or **Last name** to open the search field.
    a. There are a variety of search criteria options available; however, **Contains** is recommended.

Saving Custom Filters

1. From the sub-menu, select **Contacts** to open your client list.
2. From the menu on the right-hand side of the screen, select the T-shaped icon to open the **Filter Toggle**.
3. Select your preferred or specific filter criteria from the available filters.
4. From the top-left hand side of the screen, select **Options** then select **Save As** to open the Grid view pop-up.
5. In **Grid view**, add a name for your custom filter set.
    a. Select the **Set as default** checkbox if you want this custom filter set to be the default grid view.
6. Select **Save** to save your custom filters.

Exporting and Importing Files

Export Your Contacts List

2. From the menu on the right-hand side of the screen, select **Export** to start the export.

Export the Contacts Grid

1. From the left-hand side of the screen, select **Export Grid** and choose the preferred method - CSV or XLSX – from the dropdown.

Import Files to Your Contacts List

6. From the menu on the right-hand side of the screen, select **Import file** to open the Import pop-up.
7. If you have not mapped your list to the Import Template, select **Download Import Template** and fill in your lead information.
8. Once the Import Template is complete, select **Choose File** to select the correct import list.
9. Select **Validate** to have the information Validated by the system.
10. Once validation is complete, select **Import file** to begin the import process.

Import Your Outlook Contacts

1. From the menu on the right-hand side of the screen, select **Outlook Contacts** to open the Outlook Contacts pop-up.
2. Select **Sync From Outlook** to add your outlook contacts to the CRM.

Source

Objectives

1. Add a source.
2. Filter the Sources list.

Adding a Source

1. From the sub-menu, select **Source** to open the Sources list.
2. From the right-hand side of the screen, select **Add Source** to open the New Source pop-up.
3. In the **New Source** pop-up, select the **Type** of source:
    a. General: A source who provides non-continuous or one-off referrals.
    b. Unpaid Referral: A source with which you are in a dedicated, continuous unpaid referral relationship.
    c. Paid Referral: A source with which you are in a dedicated, continuous paid referral relationship.

4. Complete the following information details:
    a. **Name**: The first and last name of the referral partner.
    b. **Source**: Where or how you met the referral partner.
    c. **Contact Information**: Add at least one type of contact information, either email or phone number.
    a. **Tags**: Add office-specific tags to your clients.
        i. For example, industry, hot versus cold, business type, ownership, etc.
5. Select **Save** to save the new source.

Navigating the Sources List

Using the Filter field

1. From the sub-menu, select **Source** to open the Sources list.
2. From beside the **Filter** field, select the **arrow** to open the filter dropdown.
3. Once the desired filter fields are completed, select **Apply** to apply the filters to the Sources list.

Using the List Fields

1. From the sub-menu, select **Source** to open the Sources list.
2. From the list, select the column name to filter the list by ascending or descending order.

Note: The **# of Total Clients** refers to the number of Temporary Clients provided by and attached to the referral source.

Client Registry

Objectives

1. Search the client registry.
2. Export client registry information.

Searching the Client Registry

1. From the sub-menu, select **Client Registry** to open the registry.
2. From the menu on the right-hand side of the screen, select the T-shaped icon to open the **Filter Toggle**.
3. Select the small arrow beside **Client Status** to open a dropdown:
    a. **Active**: Includes all clients under an active protection period.
        i. This is the default Client Status.
    b. **Archived**: Includes all clients that have been archived from the list.
    c. **Expired**: Includes all clients whose protection period or Service Agreement has expired.

Note: Double-check that you have selected **Active, Archived, and Expired** when wanting to search for existing clients to avoid overlap.

4. Select the small arrow beside **Client Type** to open a dropdown:
    a. **All**: Permanent and temporary clients.
        i. This is the default Client Type.
    b. **Permanent**: Client who has a signed Service Agreement.
    c. **Temporary**: Client without a signed Service Agreement but in discussion with the franchisee.
5. Select the small arrow beside **Client name** to open the search field.
    a. There are a variety of search criteria options available; however, **Contains** is recommended.

Note: Try a couple different variations of the client's name you're looking for such as upper- and lower-case letters, acronyms, and punctuation.

6. If you find the desired client on the registry, select the **Client Name** to open the **Client Information** panel.
7. From the menu on the right-hand side of the screen, select the single-arrow icon to **Refresh** the list.
8. From the menu on the right-hand side of the screen, select the double-arrow icon to **Reset** the filters between searches.

Exporting Files

Export the Client Registry Grid

4. From the left-hand side of the screen, select **Export Grid** and choose the preferred method - CSV or XLSX – from the dropdown.

Registry Rules

Temporary or Permanent Clients

Permanent: protect/record your clients. SA (or Engagement Letter) & LOA required.

Temporary: Protect your Leads.

Protection Period

The Temporary Registry is only to be used for valid leads that are being actively pursued. The rules and procedures governing the Temporary Registry can be found in the Operations Manual (G1). These rules and procedures were developed by the Advisory Council and are administered by Head Office.

Initial Protection Period: Anywhere from 2 to 12 months. More than 12 months requires Head Office approval.

Secondary Protection Period

The following areas can be used to adjust the amount of time that the lead is protected. If you wish to add months or subtract months you enter the amount of months you wish to protect from the date you enter as the new start date (today's date). The registry will now reflect that many months of protection for that lead. You can adjust a lead up to three times.

This area allows flexibility in the management of the total of 240 months of protected time for all leads on the registry at any one time. If the sum of all months protected for any one lead, including all adjustments, is more than 12 months (resulting in more than 12 months from the original entry date), Head Office approval is required.

Protection Period Expiry Reminder

The protected number of months cannot be adjusted in the final 30 days of protected time for a lead. This reminder will allow you to decide prior to that 30 day time frame to adjust the number of protected months or to let the lead expire from the Temporary Registry.

Service Agreements

A permanent client ceases to be protected on the registry when the service agreement has expired and is not replaced with a new agreement signed by the client. A twelve month grace period is granted between the expiry date of the service agreement and the removal of the client from the

permanent registry.

You may also continue to protect the client if you provide invoices issued by you to the client and proof of payment to head office. If a period of twelve months lapses without any billing and collection activity beyond the expiration of the service agreement, the client will be removed from the permanent registry.

Protected Jurisdiction

Please provide detailed information for Protected Jurisdictions. For example: If you are pursuing a client with multiple locations in several cities, then all cities should be included as Protected Jurisdictions.

Sales

The Sales section of the CRM is our official sales pipeline management tool, designed to help you add, track, and manage your leads and opportunities throughout the sales process.

Glossary

Term	Definition	Comments
Lead	Any potential prospect or entity that might be a fit for our product. Think of it as a name on a sticky note!	
Opportunity	Any client or entity you would like to do or continue business with that has expressed interest in our services and has the services we consult to.	

Locating Leads and Opportunities

5. From the menu at the top of the screen, select the **CRM** tab to open the new Customer Relationship Management system.
6. Navigate to the menu on the left-hand side of the screen and select **Sales** to open the **Leads** and **Opportunities** sub-menu.

Leads

Objectives

1. Create a lead.
2. Utilize the various menu options in the lead profile.
3. Qualify and convert the lead to an opportunity.

Creating a Lead

1. Select **Leads** from the sub-menu to open the Leads home page.
2. From the right-hand side of the screen, select **Create Lead** to open the information page.
3. Complete the following **Lead Information** details:
    - **a. Owner**: Owner of the lead.
        - i. This will auto-populate with your account name but can be changed to a subcontractor.
    - **b. Lead Name**: Unique name that identifies the lead's position and interest.
        - i. Suggested naming convention is:
            1. [Job title of the lead] – [cost categories they show interest in or may have services for].
    - **c. Status**: Current status of the lead.
        - i. This will auto-populate with new – do not change it.
    - **d. Company Name**: Name of the company or organization the lead represents or belongs to.
        - i. This connects the lead to their employer.
    - **e. Source**: Source of the lead.
        - i. This will auto-populate with Demand Generation – do not change it.
    - **f. Additional Comments**: Background information about the lead including their interests, connections, etc.

4. Complete the following **Contact Information** details for the person or contact providing the lead:
    a. First Name,
    b. Middle Name,
    c. Emails, and
    d. Phones.
5. Add the client contact provided by the lead in the **Contact** field.

Note: This is a non-mandatory field and only needs to be completed it there is an existing contact attached to the lead.

    a. Begin typing in the field to auto-populate repeated or recently used contacts.
    b. If the desired contact doesn't show, select the three-line icon to search for existing contacts in the **Select Contact** list.
    c. If the contact is not in the list, add a new contact by selecting the plus icon to open the **Create Contact** pop-up.
        i. Complete the following information details:
            1. First name,
            2. Last name,
            3. Email, which you can check for conflicting addresses using the **Check Conflict** button, and
            4. Phones.
6. Add the name of the client the lead was created for in the **Client** field.

Note: This is a non-mandatory field and only needs to be completed it there is an existing client attached to the lead.

    a. Begin typing in the field to auto-populate clients.
    b. If the desired client doesn't show, select the three-line icon to search for existing clients in the **Client** list.
7. Add the name of the client the lead was created for in the **Client** field.
    a. Begin typing in the field to auto-populate clients.
    b. If the desired client doesn't show, select the three-line icon to search for existing clients in the **Client** list.
    c. If the desired client is not in the list, add a new client by selecting the plus icon to open the **Create Client** pop-up.
        i. Complete the following information details:
            1. Company Type: Marks what type of client this is for the registry
            2. Permanent: Client who has a signed Service Agreement.
            3. Temporary: Prospect without a signed Service Agreement but in discussion with the franchisee.
                a. This will be the default company type for most new clients, as the prospect must be temporary before it can be made permanent.
            4. Business: Any potential prospect or entity with whom you may want to pursue a professional relationship.
            5. Referral: Client is a referral source but is not signing a Service Agreement. This blocks off the client in the registry from other franchisees.
            6. Industry: Primary industry the client operates in.
            7. Client Name: Full, legal or Doing Business As name of the client.
        ii. Select **Check Conflict** to check the name against the current registry.
        iii. Location: Primary location of the client.

iv. Once all mandatory fields listed above are completed, select **Check Conflict** to check your client information against the existing Client Registry.
v. In the **Source** field, select the source of the client.
    1. Select **Add New** to add a new Source type to the client.
vi. In the **Tags** field, select **Add New** to add office-specific tags to your clients.
    1. For example, industry, hot versus cold, business type, ownership, etc.
vii. In the **Contacts** section, select the plus sign to add a new client.
viii. Complete the following **Contact – New Contact** details:
    1. First name,
    2. Email address, which can be check for a conflicting or existing contact, and
    3. Select **Save** to save the contact.
ix. In the **Sub Locations** section, select the plus icon to open the Sub Location pop-up.
x. Complete the following **Sub Location** information details:
    1. Operating Name,
    2. Street Address,
    3. City,
    4. State/province,
    5. Country, and
    6. Zip/Postal Code.
xi. Under the Operating Name, select **Check Conflict** to check the sub location client information against the existing Client Registry.
xii. Select **Save** to save the sub location to the client profile.
xiii. In the top right-hand said of the screen, select the **arrow** beside Save and View to open a dropdown list of save options:
    1. **Save and View**: Save the client and view the client overview.
    2. **Save**: Save the client and remain in the editable client profile.
    3. **Cancel**: Stop adding a new client and return to the All Clients list.

8. In the Addresses section, select **Add Address** to add all related addresses for the lead.
9. In the subsequent section, complete the following information:
    a. **Primary**: Identifies the address as the leads primary address.
    b. **Label**: A unique label or tag used to refer to the lead address on the interface.
        i. Examples: residential versus corporate, flagship versus secondary.
    c. **Office**: The lead's office number, if applicable.
10. Once done, fill in the address information:
    a. Country,
    b. Street,
    c. City,
    d. State, and
    e. Zip/Postal Code.

Note: You can add more then one address to a lead. This may be used to note their primary residence – if they provide it – and their work location, among other combinations.

11. Complete the following **Additional** information details:
    a. **Website**: Personal or corporate website of the lead.
    b. **Number of Employees**: Number of employees within the lead's company.
    c. **Industry**: Industry where the lead's company is operating.
12. In the top right-hand said of the screen, select the **arrow** beside Save and Close to open a dropdown list of save options:
    a. **Save and Close**: Save the lead, close the lead profile, and return to the homepage.
    b. **Save and New**: Save the lead and open a new lead profile.

c. **Save**: Save the lead and remain in the lead profile.

Navigating the Lead Profile

1. Select **Leads** from the sub-menu to open the Leads home page.
2. Select the small arrow beside Options to open a dropdown:
    a. **All Leads**: Includes all New, Qualified, and Disqualified leads.
    b. **Open Leads**: Includes only New leads.

Note: Double-check that you have selected **Open Leads** when wanting to create new ones or look at existing ones.

3. From the list of Open Leads, select the **Lead Name** to open the lead profile.
4. The Lead Information contains all the lead details provided during the creation stage.
    a. **Contact** and **Client** link to the Contact and Client pages respectively under the Clients tab.
    b. **Emails** links to the leads email inbox.
5. The **Address Book** displays all added addresses, as well as a map view of the location.
    a. Select **Add Address** to add a new address to the widget.
    b. To delete an address, select **Edit** on the top-right hand side of the screen, then select the trash icon on the address you want to remove.
6. More options can be found in the menu at the top-right hand side of the screen:
    a. **Disqualify**: Marks the lead as not qualified to become an opportunity and removes it from the Open Leads list.
    b. **Convert to Opportunity**: Marks the lead as qualified and moves it to the Opportunities tab.
    c. **Edit**: Allows you to edit, add, and delete all information included in the lead profile.
    d. **Delete**: Deletes the lead entirely. Any deleted leads will not show in the All Leads list and cannot be recovered.
    e. **More Actions**: A variety of actions used to notate, communicate, and track the lead. All actions will be noted in the **Action** section of the lead profile.
7. Select **More actions** to access the actions dropdown:
    a. **Add note**: Allows you to add a note to the lead profile.
    b. **Send email**: Generates an email draft page with built-in email templates.
    c. **Add event**: Allows you to add an event to your calendar.
    d. **Log call**: Allows you to log a call had with the lead.
    e. **Add task**: Allows you to add a task related to the lead to your Task page.

Note: Add a **Context** tag to link the action to any relevant pages, for example, the Contacts page.

Exporting and Importing Files

Export Your Leads List

7. From the menu on the right-hand side of the screen, select **Export** to start the export.

Export the Leads Grid

8. From the left-hand side of the screen, select **Export Grid** and choose the preferred method - CSV or XLSX – from the dropdown.

Import Files to Your Leads List

11. From the menu on the right-hand side of the screen, select **Import file** to open the Import pop-up.
12. If you have not mapped your list to the Import Template, select **Download Import Template** and fill in your lead information.
13. Once the Import Template is complete, select **Choose File** to select the correct import list.

14. Select **Validate** to have the information Validated by the system.
15. Once validation is complete, select **Import file** to begin the import process.

Navigating Sales Filters

6. From the sub-menu, select **Leads** to open your client list.
7. From the menu on the right-hand side of the screen, select the T-shaped icon to open the **Filter Toggle**.
8. Select the small arrow beside **Lead name** to open the search field.
    a. There are a variety of search criteria options available; however, **Contains** is recommended.

Saving Custom Filters

9. From the sub-menu, select **Leads** to open your client list.
10. From the menu on the right-hand side of the screen, select the T-shaped icon to open the **Filter Toggle**.
11. Select your preferred or specific filter criteria from the available filters.
12. From the top-left hand side of the screen, select **Options** then select **Save As** to open the Grid view pop-up.
13. In **Grid view**, add a name for your custom filter set.
    a. Select the **Set as default** checkbox if you want this custom filter set to be the default grid view.
14. Select **Save** to save your custom filters.

Converting a Lead to an Opportunity

16. Select **Leads** from the sub-menu to open the Leads home page.
17. Select the small arrow beside Options to open a dropdown:
    a. All Leads: Includes all New, Qualified, and Disqualified leads.
    b. Open Leads: Includes only New leads.

Note: Double-check that you have selected **Open Leads** when wanting to create new ones or look at existing ones.

18. From the list of Open Leads, select the **Lead Name** to open the lead profile.
19. From the menu on the top-right hand side of the screen, select **Convert to Opportunity**.

Note: When you want to make a Lead become a Prospect, you must either make them a business or a **temporary client** in the client registry via the **Clients** section.

1. Complete the following **Opportunity Information** details:
    d. Owner Name: Owner of the lead.
        i. This will auto-populate with your account name but can be changed to a subcontractor.
    e. Opportunity Name: Name used to refer to the opportunity in the system.
        i. Suggested naming convention is:
            1. [Job title of the lead] – [cost categories they show interest in or may have services for].
    a. Status: Where the opportunity sits in the progress of the sale.
        i. This will auto-populate with Prospects.
    b. Currency: The currency the opportunity is budgeted and spent in.
    c. Term of Agreement: Length of the Service Agreement.
        i. This will auto-populate with the standard 36 months.
    d. Expected Close Date: The expected date for having a signed Service Agreement, and thus a closed opportunity.

2. Add the name of the business or client the lead was created for in the **Client** field.
    a. Begin typing in the field to auto-populate clients.
    b. If the desired business or client doesn't show, select the three-line icon to search for existing clients in the **Client** list.
    c. If the desired business or client is not in the list, add a new client by selecting the plus icon to open the **Create Client** pop-up.
        i. Complete the following information details:
            1. **Company Type**: Marks what type of client this is for the registry
            2. **Permanent**: Client who has a signed Service Agreement.
            3. **Temporary**: Prospect without a signed Service Agreement but in discussion with the franchisee.
                a. This will be the default company type for most new clients, as the prospect must be temporary before it can be made permanent.
            4. **Business**: Any potential prospect or entity with whom you may want to pursue a professional relationship.
            5. **Referral**: Business or client is a referral source but is not signing a Service Agreement. This blocks off the client in the registry from other franchisees.
            6. **Industry**: Primary industry the business or client operates in.
            7. **Client Name**: Full, legal or Doing Business As name of the business or client.
        ii. Select **Check Conflict** to check the name against the current registry.
        iii. **Location**: Primary location of the business or client.
        iv. Once all mandatory fields listed above are completed, select **Check Conflict** to check your client information against the existing Client Registry.
        v. In the **Source** field, select the source of the business or client.
            1. Select **Add New** to add a new Source type to the client.
        vi. In the **Tags** field, select **Add New** to add office-specific tags to your clients.
            1. For example, industry, hot versus cold, business type, ownership, etc.
        vii. In the **Contacts** section, select the plus sign to add a new contact.
        viii. Complete the following **Contact – New Contact** details:
            1. First name,
            2. Email address, which can be check for a conflicting or existing contact, and
            3. Select **Save** to save the contact.
        ix. In the **Sub Locations** section, select the plus icon to open the Sub Location pop-up.
        x. Complete the following **Sub Location** information details:
            1. Operating Name,
            2. Street Address,
            3. City,
            4. State/province,
            5. Country, and
            6. Zip/Postal Code.
        xi. Under the Operating Name, select **Check Conflict** to check the sub location client information against the existing Client Registry.
        xii. Select **Save** to save the sub location to the client profile.
        xiii. In the top right-hand said of the screen, select the **arrow** beside Save and View to open a dropdown list of save options:
            1. **Save and View**: Save the client and view the client overview.
            2. **Save**: Save the client and remain in the editable client profile.
            3. **Cancel**: Stop adding a new client and return to the All Clients list.

3. Additional comments can be added on the right-hand side of the screen:
    a. **Customer Need**: Description of the business' or client's needs that constitute the business opportunity.
    b. **Proposed Solution**: Description of the solution proposed to the business or client by the franchisee, such as the cost categories we can speak to.
4. Add an estimated spend amount in the **Spend by Cost Category** section by selecting the **Cost Category** and inputting the estimated **Amount** and **Contingency** percentage.
    a. All cost categories auto-populate their own savings percentage applied.
    b. The amount will generate the estimated amount of savings based on the cost category savings percentage and the estimated amount.
    c. Multiple spend by cost category sections can be added.
5. In the top right-hand said of the screen, select the **arrow** beside Save and Close to open a dropdown list of save options:
    a. **Save and Close**: Save the lead, close the lead profile, and return to the homepage.
    b. **Save and New**: Save the lead and open a new lead profile.
    c. **Save**: Save the lead and remain in the lead profile.

Opportunities

Opportunities oversees the sales pipeline for your added businesses or clients, but it ultimately has **two functions**:

1. A new prospective business with which you want to do Schooley Mitchell business.
2. An existing client for which you want to do a new Schooley Mitchell business service.

Objectives

1. Create an opportunity.
2. Utilize the various menu options in the opportunities profile.
3. Track and manage opportunities during the sales pipeline.

Creating an Opportunity

From the Opportunities Sub-Menu

6. Select **Opportunities** from the sub-menu to open the Opportunities home page.
7. From the right-hand side of the screen, select **Create Opportunity** to open the information page.
8. Complete the following **Opportunity Information** details:
    f. **Owner Name**: Owner of the lead.
        i. This will auto-populate with your account name.
    g. **Opportunity Name**: Name used to refer to the opportunity in the system.
        i. Suggested naming convention is:
            1. [Job title of the lead] – [cost categories they show interest in or may have services for].
    a. **Status**: Where the opportunity sits in the progress of the sale.
        i. This will auto-populate with Prospects.
    b. **Currency**: The currency the opportunity is budgeted and spent in.
    c. **Term of Agreement**: Length of the Service Agreement.
        i. This will auto-populate with the standard 36 months.
    d. **Expected Close Date**: The expected date for having a signed Service Agreement, and thus a closed opportunity.

9. Add the name of the business or client the lead was created for in the **Client** field.
    a. Begin typing in the field to auto-populate clients.
    b. If the desired business or client doesn't show, select the three-line icon to search for existing clients in the **Client** list.
10. Add the business or client's point of contact in the **Contact** field.
    a. Begin typing in the field to auto-populate repeated or recently used contacts.
    b. If the desired contact doesn't show, select the three-line icon to search for existing contacts in the **Select Contact** list.
    c. If the contact is not in the list, add a new contact by selecting the plus icon to open the **Create Contact** pop-up.
        i. Complete the following information details:
            1. First name,
            2. Last name,
            3. Email, which you can check for conflicting addresses using the **Check Conflict** button, and
            4. Phones.
11. Additional comments can be added on the right-hand side of the screen:
    a. Customer Need: Description of the business' or client's needs that constitute the business opportunity.
    b. Proposed Solution: Description of the solution proposed to the business or client by the franchisee, such as the cost categories we can speak to.
12. Add an estimated spend amount in the **Spend by Cost Category** section by selecting the **Cost Category** and inputting the estimated **Amount**.
    a. All cost categories auto-populate their own savings percentage applied.
    b. The amount will generate the estimated amount of savings per month based on the cost category savings percentage and the estimated amount.
    c. Multiple spend by cost category sections can be added.
13. In the top right-hand said of the screen, select the **arrow** beside Save and Close to open a dropdown list of save options:
    a. Save and Close: Save the lead, close the lead profile, and return to the homepage.
    b. Save and New: Save the lead and open a new lead profile.
    c. Save: Save the lead and remain in the lead profile.

From a Client's Profile

1. From the menu at the top of the screen, select the **CRM** tab to open the new Customer Relationship Management system.
2. Navigate to the menu on the left-hand side of the screen and select **Clients** to open the sub-menu.
3. From the sub-menu, select **Clients** to open your client list.
4. Select the **Client Name** to open the client overview.
5. In the **Opportunities** section, select **New Opportunity** to open the Create Opportunity page.
14. Complete the following **Opportunity Information** details:
    h. Owner Name: Owner of the lead.
        i. This will auto-populate with your account name.
    i. Opportunity Name: Name used to refer to the opportunity in the system.
        i. Suggested naming convention is:
            1. [Job title of the lead] – [cost categories they show interest in or may have services for].

   a. **Status**: Where the opportunity sits in the progress of the sale.
      i. This will auto-populate with Prospects.
   b. **Currency**: The currency the opportunity is budgeted and spent in.
   c. **Term of Agreement**: Length of the Service Agreement.
      i. This will auto-populate with the standard 36 months.
   d. **Expected Close Date**: The expected date for having a signed Service Agreement, and thus a closed opportunity.
15. Add the name of the business or client the lead was created for in the **Client** field.
   a. Begin typing in the field to auto-populate clients.
   b. If the desired business or client doesn't show, select the three-line icon to search for existing clients in the **Client** list.
16. Add the business or client's point of contact in the **Contact** field.
   a. Begin typing in the field to auto-populate repeated or recently used contacts.
   b. If the desired contact doesn't show, select the three-line icon to search for existing contacts in the **Select Contact** list.
   c. If the contact is not in the list, add a new contact by selecting the plus icon to open the **Create Contact** pop-up.
      i. Complete the following information details:
         1. First name,
         2. Last name,
         3. Email, which you can check for conflicting addresses using the **Check Conflict** button, and
         4. Phones.
17. Additional comments can be added on the right-hand side of the screen:
   a. **Customer Need**: Description of the business or client's needs that constitute the business opportunity.
   b. **Proposed Solution**: Description of the solution proposed to the business or client by the franchisee, such as the cost categories we can speak to.
18. Add an estimated spend amount in the **Spend by Cost Category** section by selecting the **Cost Category** and inputting the estimated **Amount**.
   a. All cost categories auto-populate their own savings percentage applied.
   b. The amount will generate the estimated amount of savings per month based on the cost category savings percentage and the estimated amount.
   c. Multiple spend by cost category sections can be added.
19. In the top right-hand said of the screen, select the **arrow** beside Save and Close to open a dropdown list of save options:
   a. **Save and Close**: Save the lead, close the lead profile, and return to the homepage.
   b. **Save and New**: Save the lead and open a new lead profile.
   c. **Save**: Save the lead and remain in the lead profile.

<u>Navigating the Opportunity Profile</u>

1. Select **Opportunities** from the sub-menu to open the Opportunities home page.
2. Select the small arrow beside Options to open a dropdown:
   a. **All Opportunities**: Includes all opportunities, including those in the Submitted for Production and Lost statuses.
   b. **Open Opportunities**: Includes any opportunities not in Submitted for Production or Lost status.
   c. **Overdue Opportunities**: Includes any opportunities with an expired expected close date not in Submitted for Production or Lost status.

   d. **Recently Closed Opportunities**: Includes any opportunities post 30 days of the expected close date in Submitted for Production status.

Note: Double-check that you have selected **Open Opportunities** when wanting to create new ones or look at existing ones.

Note: You can change the view to a grid view by selecting the 9-grid box on the right-hand side of the screen.

3. From the list of Open Opportunities, select the opportunities' name to open the opportunity profile.
4. The **General Information** contains all the opportunity details provided during the creation stage.
   a. **Contact** and **Client** link to the Contact and Client pages respectively under the Clients tab.
5. The **Spend by Cost Category** contains the spend details provided during the creation stage.
6. The **Additional Information** contains all attachments added to the opportunity, primarily the Service Agreement once it's been signed and uploaded.
7. The **Relevant Opportunities** link other existing opportunities for the same client, so you can see and access all opportunities for the same client.
8. More options can be found in the menu at the top-right hand side of the screen:
   a. **Edit**: Allows you to edit, add, and delete all information included in the opportunity profile.
   b. **Delete**: Deletes the opportunity entirely. Any deleted opportunities will not show in the All Opportunities list and cannot be recovered.
   c. **More Actions**: A variety of actions used to notate, communicate, and track the opportunity. All actions will be noted in the **Action** section of the lead profile.
9. Select **More actions** to access the actions dropdown:
   a. **Add note**: Allows you to add a note to the lead profile.
   b. **Send email**: Generates an email draft page with built-in email templates.
   c. **Add event**: Allows you to add an event to your calendar.
   d. **Log call**: Allows you to log a call had with the lead.
   e. **Add task**: Allows you to add a task related to the lead to your Task page.

Note: Add a **Context** tag to link the action to any relevant pages, for example, the Contacts page.

<u>Exporting and Importing Files</u>

Export Your Opportunities List

1. From the menu on the right-hand side of the screen, select **Export** to start the export.

Import Files to Your Opportunities List

1. From the menu on the right-hand side of the screen, select **Import file** to open the Import pop-up.
2. If you have not mapped your list to the Import Template, select **Download Import Template** and fill in your lead information.
3. Once the Import Template is complete, select **Choose File** to select the correct import list.
4. Select **Validate** to have the information Validated by the system.
5. Once validation is complete, select **Import file** to begin the import process.

<u>Navigating Sales Filters</u>

9. From the sub-menu, select **Opportunities** to open your client list.
10. From the menu on the right-hand side of the screen, select the T-shaped icon to open the **Filter Toggle**.
11. Select the small arrow beside **Opportunity name** to open the search field.
    a. There are a variety of search criteria options available; however, **Contains** is recommended.

Saving Custom Filters

15. From the sub-menu, select **Opportunities** to open your client list.
16. From the menu on the right-hand side of the screen, select the T-shaped icon to open the **Filter Toggle**.
17. Select your preferred or specific filter criteria from the available filters.
18. From the top-left hand side of the screen, select **Options** then select **Save As** to open the Grid view pop-up.
19. In **Grid view**, add a name for your custom filter set.
    a. Select the **Set as default** checkbox if you want this custom filter set to be the default grid view.
20. Select **Save** to save your custom filters.

Changing an Opportunities Status

Changing the status of an opportunity can be done in 2 ways – from the Opportunities home page and the opportunity profile.

Available Statuses

1. **Prospects**: A business that you are targeting for Schooley Mitchell services with the end goal of a Service Agreement.
2. **Research**: Begin preparing for a briefing by looking for the prospects cost categories, pain points, and points of contact, and pulling cheat sheets, marketing downloads, and testimonials.

Note: Once the research phase is complete, and you've set up the briefing, you must make the business a **temporary client** in the client registry via the **Clients** section.

3. **Briefing**: Discussion with the prospect to determine if their minimum thresholds and spends amounts qualify for analysis.
4. **Follow-up Meetings/Discussions**: Where the prospect stays until a Service Agreement is ready to be signed.
5. **Service Agreement**: Once the prospect is ready to sign a Service Agreement.
    a. When a prospect is moved to this status, it triggers the Service Agreement Document Wizard.
6. **SA-Sign Off**: Once the client has signed the Service Agreement and must be added to the permanent registry.
    a. When a client is moved to this status, it triggers the Upload Service Agreement space.

Note: Once the Service Agreement is uploaded, you must make the client **permanent** in the client registry via the **Clients** section.

7. **Submitted to Production:** Once the client has been submitted for production.
8. **Lost**: If the prospects expected closed date has expired with no Service Agreement signed.

Opportunities Home Page

9. Select **Opportunities** from the sub-menu to open the Opportunities home page.
10. From the list of Open Opportunities, select the opportunity you want to move, and drag it to the next status box.
11. Your opportunity has now moved to the new status box, which will be updated in the opportunity profile.

Opportunities Profile

1. Select **Opportunities** from the sub-menu to open the Opportunities home page.
2. From the list of Open Opportunities, select the opportunities' name to open the opportunity profile.
3. Fom the menu on the top-right hand side of the screen, select **Edit**.
4. Select the arrow beside the **Status** field to open the statuses drop down.
5. When a new status is selected, select **Save and Close**.
6. Select Opportunities from the top-left hand side of the screen to return to the home page.
7. Your opportunity has now moved to the new status box.