Sales for the
mobile professional

JANUARY 2008

SalesNOW User's Manual

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Sales for the mobile professional

SalesNOW BlackBerry Edition

Main Menu

Navigating main tabs

The SalesNOW BlackBerry Edition has seven main tabs: **Contacts**; **Companies**; **Deals**; **Emails**; **Activities**; **Reports** and **Recent Items**. When SalesNOW launches, it automatically opens the **Contacts** tab. To move to a different tab, follow these steps:

1. In the **Contacts** tab, click the ESC key. This will bring you to the main tab menu.

2. Roll the trackwheel to move to a different main tab.

3. Click the trackwheel.

4. Click **Open**.

Note:

Clicking ESC from within any main tab will bring you to the main tab menu.

Contact search

1. In the main tab menu or within any main tab, click the trackwheel.

2. Click **Contact Search**.

3. Enter the contact's Last Name, First Name or Company Name.

4. Highlight the appropriate search criteria and click the trackwheel to select.

5. Highlight the **Search** button.

6. Click the trackwheel.

Contact tree

The contact tree provides a complete view of your contacts. The first level is the company, next is the contacts within the company and finally any deals, emails or activities associated with the contact.

1. In the main tab menu or within any main tab, click the trackwheel.

2. Click **Contact Tree**.

3. Highlight the Company you wish to expand and click the trackwheel.

4. Click **Expand**.

5. Highlight the Contact you wish to open or expand.

6. Click **Open** to open the contact record, or

7. Click **Expand** to view any deals, emails or activities associated with the contact.

8. Highlight any deals, emails or activities you wish to view and click the trackwheel.

9. Click **Open** to open the deal, email or activity that you wish to view/edit.

Options: change font size

1. In the main tab menu or within any main tab, click the trackwheel.

2. Click **Options**.

3. Highlight the font size and click the trackwheel to **Change Option**.

4. Roll the trackwheel up or down to move to change the font size.

5. Click the trackwheel.

6. Highlight the **Save** button.

7. Click the trackwheel.

Options: change pull interval

Changes made within the SalesNOW BlackBerry Edition are automatically pushed to the SalesNOW Web Edition. However, changes made within the SalesNOW Web Edition are pulled down to the SalesNOW BlackBerry Edition at a timed interval. By default, this interval is set at **Never**. To change this setting, follow these steps:

1. In the main tab menu or within any main tab, click the trackwheel.

2. Click **Options**.

3. Highlight the change pull interval and click the trackwheel to **Change Option**.

4. Roll the trackwheel up or down to move to change the pull interval.

5. Click the trackwheel.

6. Highlight the **Save** button.

7. Click the trackwheel.

Related Topic

Refer to the Synchronize! section below to learn how to force a one-time synchronization with the SalesNOW Web Edition.

Options: prompt for password on start-up

To increase security for your SalesNOW data, you may wish to require the system to prompt for a password on start-up.

1. In the main tab menu or within any main tab, click the trackwheel.

2. Click **Options**.

3. Highlight the prompt for password and click the trackwheel to **Change Option**.

4. Highlight the **Save** button.

5. Click the trackwheel.

Options: change password

1. In the main tab menu or within any main tab, click the trackwheel.

2. Click **Options**.

3. Type the New Password and type it again.

4. Highlight the **Change** button.

5. Click the trackwheel.

Note:
If you change your SalesNOW password on the BlackBerry, you must also change your SalesNOW password on the Web to match; otherwise data synchronization will not occur.

Options: import all contacts from my blackberry

You may wish to import all of your contacts from your BlackBerry Address Book into SalesNOW. This procedure will not only add the contacts into SalesNOW, but it will also add the companies as well.

1. In the main tab menu or within any main tab, click the trackwheel.
2. Click **Options**.
3. Roll the trackwheel down to the "Import all contacts from my BB area".
4. Highlight the Import button.
5. Click the trackwheel.

Options: refresh all data from the server

There may be a situation when you would want to pull ALL the data down from your SalesNOW Web Edition, for example if you were to upgrade to a new BlackBerry device.

1. In the main tab menu or within any main tab, click the trackwheel.
2. Click **Options**.
3. Roll the trackwheel down to highlight the **Refresh** button.
4. Click the trackwheel.

Synchronize!

This feature forces a one-time synchronization of any changes in the SalesNOW Web Edition.

1. In the main tab menu or within any main tab, click the trackwheel.
2. Click **Synchronize!**.

Related Topic

Refer to the **Options: change pull interval** section above to learn how to force a scheduled synchronization of changes with the SalesNOW Web Edition.

Summary

This feature provides a summary of the number of records within SalesNOW and free memory on your device.

1. In the main tab menu or within any main tab, click the trackwheel.
2. Click **Summary**.

Help

1. In the main tab menu or within any main tab, click the trackwheel.
2. Click **Help**.

Contacts

Add contacts

1. In the **Contacts** tab, click the trackwheel.
2. Click **New Contact**.
3. Type the contact's information.
4. Click the trackwheel.
5. Click **Save**.

Add a company to a contact

1. To add a company association to a contact, open the contact record and click the magnifying glass.
2. Highlight an existing company and click the trackwheel and click **Select "Company Name"**.

Add a new company to a contact

1. To add a new company association to a contact, open the contact record and click the **+** beside the company field.
2. Enter in the new company information.
3. Click the trackwheel.
4. Click **Save**.
5. The new company will be added to the contact record.

Remove a company from a contact

1. To remove a company association from a contact, open the contact record and click the **X** beside the company name.

View/Edit contacts

1. In the **Contacts** tab, highlight the contact and click the trackwheel.
2. Click **Open**.
3. View/edit the contact information.
4. Click the trackwheel.
5. Click **Save**.

Note:
To quickly find a contact, simply start typing their name and contacts will be filtered accordingly.

Delete contacts

1. In the **Contacts** tab, highlight the contact and click the trackwheel.
2. Click **Delete "Contact Name"**.
3. Confirm by clicking **Delete**.

Copy contacts

Copying a contact helps save time when entering a new contact. It copies some of the contact's key information, such as company association, work address and phone number.

1. In the **Contacts** tab, highlight the contact to copy and click the trackwheel.
2. Click Copy This Contact.
3. Type the contact information.
4. Click the trackwheel.
5. Click **Save**.

Sort contacts

Contacts can be sorted in a number of ways, including by first name, last name, company name and city name.

1. In the **Contacts** tab, click the trackwheel.
2. Click **Sort by Last**, for example.

Note:

The first sort performed will be in ascending order and the second will be in descending order. The sort order will be automatically saved for the next time you view the contact list.

Call contacts

1. In the **Contacts** tab, highlight the contact and click the trackwheel.
2. Click **Call "Contact Name"**.
3. If asked, click **Yes** to allow SalesNOW to initiate the phone call.

Email contacts

1. In the **Contacts** tab, highlight the contact and click the trackwheel.
2. Click **Email "Contact Name"**.
3. Type the email subject and body and click the trackwheel.
4. Click **Send**.

Get map for contacts

1. In the **Contacts** tab, highlight the contact and click the trackwheel.
2. Click **Get Map**.

Note:

The mapping feature is utilizing Google Maps. Please ensure that the name entered in the State/Province field is the full name or the official 2-character state/province code.

Add a deal or an activity to a contact

1. In the **Contacts** tab, highlight the contact and click the trackwheel.
2. Click your choice of **New Deal** or **New Activity** to create a new deal or activity associated with the contact.
3. Type the new deal or activity information.

4. Click the trackwheel.

5. Click **Save**.

Related Topic

Refer to the Deals or Activities section of this manual to learn another way to enter a new deal or a new activity.

View/Edit deals, emails or activities for contacts

1. In the **Contacts** tab, highlight the contact and click the trackwheel.

2. Click your choice of **Deals, Emails or Activities** to view/edit items associated with the contact.

3. Highlight the item you wish to view/edit and click the trackwheel.

4. Click **Open** to open the deal, email or activity that you wish to view/edit.

Note:

Another way to view/edit deals, emails or activities for contacts is to open the contact record and click the appropriate deals, emails or activities sub-tab.

Companies

Add companies

1. In the **Companies** tab, click the trackwheel.

2. Click **New Company**.

3. Type the company's general information.

4. Click the trackwheel.

5. Click **Save**.

View/Edit companies

1. In the **Companies** tab, highlight the company and click the trackwheel.

2. Click **Open**.

3. View/edit the company information.

4. Click the trackwheel.

5. Click **Save**.

Note:
To quickly find a company, simply start typing the company name and the companies will be filtered accordingly.

Delete companies

1. In the **Companies** tab, highlight the company and click the trackwheel.

2. Click **Delete "Company Name"**.

3. Confirm by clicking **Delete**.

Sort companies

Companies can be sorted by Name or by City.

1. In the **Companies** tab, click the trackwheel.

2. Click **Sort by City**, for example.

Note:
The first sort performed will be in ascending order and the second will be in descending order. The sort order will be automatically saved for the next time you view the company list.

Get Map for companies

1. In the **Companies** tab, highlight the company and click the trackwheel.

2. Click **Get Map**.

Note:
The mapping feature is utilizing Google Maps. Please ensure that the name entered in the State/Province field is the full name or the official 2-character state/province code.

Add a deal or an activity to a company

1. In the **Companies** tab, highlight the company and click the trackwheel.

2. Click your choice of **New Deal** or **New Activity** to create a new deal or activity associated with the company.

3. Type the new deal or activity information.

4. Click the trackwheel.

5. Click **Save**.

Related Topic

Refer to the Deals or Activities section of this manual to learn another way to enter a new deal or a new activity.

View/Edit contacts, deals, emails or activities for companies

1. In the **Companies** tab, highlight the company and click the trackwheel.

2. Click your choice of **Contacts, Deals, Emails or Activities** to view/edit items associated with the company.

3. Highlight the item you wish to view/edit and click the trackwheel.

4. Click **Open** to open the deal, email or activity that you wish to view/edit.

Note:

Another way to view/edit contacts, deals, emails or activities for companies is to open the company record and click the appropriate contacts, deals, emails or activities sub-tab.

Search for companies

1. In the **Companies** tab, or on any main tab, click the trackwheel.

2. Click **Contact Search**.

3. Enter the company name.

4. Highlight **Search** and click the trackwheel.

Deals

Add deals

1. In the **Deals** tab, click the trackwheel.
2. Click **New Deal**.
3. Type the deal information.
4. Click the **General** tab to enter the deal's general information.
5. Click the trackwheel.
6. Click **Save**.

Add a contact to a deal

1. To add a primary contact association to a deal, click the magnifying glass within the deal.
2. Select an existing contact and click **Select "Contact Name"**. If this contact is associated to a company, the company will automatically be associated to the deal as well.

Note:
To add additional contact associations to a deal, open the deal record and scroll to the **Contacts** sub-tab and click the trackwheel to active. Click the trackwheel and click **New Contact Role**.

Add a new contact to a deal

1. To add a new contact association to a contact, open the deal record and click the **+** beside the Contact field.
2. Enter in the new contact information.
3. Click the trackwheel.
4. Click **Save**.
5. The new contact will be added to the deal record.

Add a company to a deal

1. To add a primary company association to a deal, click the magnifying glass within the deal.
2. Select an existing company and click **Select "Company Name"**.

Note:
To add additional company associations to a deal, open the deal record and scroll to the **Companies** sub-tab. Click the trackwheel and click **New Company Role**.

Add a new company to a deal

1. To add a new company association to a contact, open the deal record and click the + beside the Company field.

2. Enter in the new company information.

3. Click the trackwheel.

4. Click **Save**.

5. The new company will be added to the deal record.

Remove a contact or company from a deal

1. To remove a primary contact or company association from a deal, click the **X** beside the name.

View/Edit deals

1. In the **Deals** tab, highlight the deal and click the trackwheel.

2. Click **Open**.

3. View/edit the deal information.

4. Click the trackwheel.

5. Click **Save**.

Note:
To quickly find a deal, simply start typing the name and deals will be filtered accordingly.

Delete deals

1. In the **Deals** tab, highlight the deal and click the trackwheel.

2. Click **Delete "Deal Name"**.

3. Confirm by clicking **Delete**.

Sort deals

Deals can be sorted in a number of ways, including by deal name, company name, call back date, anticipated close date and estimated value.

1. In the **Deals** tab, click the trackwheel.

2. Click **Sort by Call Back**, for example.

Note:
The first sort performed will be in ascending order and the second will be in descending order. The sort order will be automatically saved for the next time you view the deal list.

Call the deal's primary contact

1. In the **Deals** tab, highlight the deal and click the trackwheel.

2. Click **Call "Contact Name"**.

3. If prompted, click **Yes** to allow SalesNOW to initiate the phone call.

Email the deal's primary contact

1. In the **Deals** tab, highlight the deal and click the trackwheel.

2. Click **Email "Contact Name"**.

3. Type the email subject and body and click the trackwheel.

4. Click **Send**.

Note:

Emails sent in this way will be automatically associated to the deal and can be viewed from the **Emails** sub-tab within the deal.

Add an activity to a deal

1. In the **Deals** tab, highlight the deal and click the trackwheel.

2. Click **New Activity** to create a new activity associated with the deal.

3. Type the activity information.

4. Click the trackwheel.

5. Click **Save**.

Related Topic

Refer to the Activities section of this manual to learn another way to enter a new activity to a deal.

View/Edit emails or activities for deals

1. In the **Deals** tab, highlight the deal and click the trackwheel.

2. Click your choice of **Emails or Activities** to view/edit items associated with the deal.

3. Highlight the item you wish to view/edit and click the trackwheel.

4. Click **Open** to open the email or activity that you wish to view/edit.

Note:

Another way to view/edit emails or activities for deals is to open the deal record and click the emails or activities sub-tab.

View/Edit contact or company roles for deals

1. In the **Deals** tab, highlight the deal and click the trackwheel.

2. Click **Open** to open the deal.

3. Click the **Contacts** or **Companies** sub-tab.

4. Highlight the contact or company role you wish to view/edit and click the trackwheel.

5. Select **Edit, New or Delete** option for contact or company roles.

Activities

Add activities

1. In the **Activities** tab, click the trackwheel.
2. Click **New Activity**.
3. Type the activity information.
4. Click the trackwheel.
5. Click **Save**.

Add a contact to an activity

1. To add a primary contact association to an activity, click the magnifying glass within the Activity.
2. Select an existing contact or click the trackwheel and click **New Contact**. If this contact is associated to a company, the company will automatically be associated to the activity as well.

Note:

To add additional contact associations to an activity, open the activity record and scroll to the **Contacts** sub-tab and click the trackwheel to active. Click the trackwheel and click **New Contact Role**.

Add a company to an activity

1. To add a primary company association to an activity, click the magnifying glass within the Activity.
2. Select an existing company and click the trackwheel for **Select "Company Name"**.

Note:

To add additional company associations to an activity, open the activity record and scroll to the **Companies** sub-tab and click the trackwheel to active. Click the trackwheel and click **New Company Role**.

Add a new company to an activity

To add a new company association to an activity, open the activity record and click the **+** beside the Company field.

1. Enter in the new company information.
2. Click the trackwheel.
3. Click **Save**.
4. The new company will be added to the activity record.

Add a deal to an activity

1. To add a deal association to an activity, click the magnifying glass within the activity.

2. Select an existing deal and click the trackwheel for **Select "Deal Name"**.

Add a new deal to an activity

1. To add a new deal association to an activity, open the activity record and click the **+** beside the Deal field.

2. Enter in the new deal information.

3. Click the trackwheel.

4. Click **Save**.

Remove a contact, company or deal from an activity

1. To remove a contact, company or deal association from an activity, click the **X** beside the name.

View/Edit activities

1. In the **Activities** tab, highlight the activity and click the trackwheel.

2. Click **Open**.

3. View/edit the activity information.

4. Click the trackwheel and **Save**

Delete activities

1. In the **Activities** tab, highlight the activity and click the trackwheel.

2. Click **Delete "Activity Name"**.

3. Confirm by clicking **Delete**.

Sort activities

Activities can be sorted by subject or date.

1. In the **Activities** tab, click the trackwheel.

2. Click **Sort by Subject**, for example.

Note:
The first sort performed will be in ascending order and the second will be in descending order.

View/Edit contact or company roles for activities

1. In the **Activities** tab, highlight the activity and click the trackwheel.

2. Click **Open** to open the activity.

3. Click the **Contacts** or **Companies** sub-tab.

4. Highlight the contact or company role you wish to view/edit and click the trackwheel.

5. Select **Edit, New or Delete** option for contact or company roles.

Emails

Send emails

1. In the **Emails** tab, click the trackwheel.

2. Click **Compose Email**.

3. Click **Email "Contact Name"**. If this contact is associated to a company, the company will automatically be associated to the email as well.

4. Type the email subject and body and click the trackwheel.

5. Click **Send** to send the email to the recipients.

Related topic

Refer to the Contacts or Deals section of this manual to learn how to email from a contact or a deal. Also, refer to the BlackBerry Emails section of this manual to learn how to send a SalesNOW email from the BlackBerry email application.

Add multiple contacts to an email

To add multiple contacts to an email, in the message click the trackwheel. To add an additional **To** recipient, click **Add SalesNOW To:**. To add a carbon copy (CC) recipient or a blind carbon copy (BCC) recipient, click **Add SalesNOW Cc:** or **Add SalesNOW Bcc:**.

Add a company to an email

1. To add a primary company association to an email, click the magnifying glass. Select an existing company.

2. Click **Select "Company Name"**.

Note:

Once the email has been sent, to add additional company associations to an email, open the email record within SalesNOW and click the **Companies** sub-tab. Click the trackwheel and click **New Company Role**.

Add a deal to an email

1. To add a deal association to an email, in the message click the trackwheel. Click **Associate with Deal**. Select an existing deal.

2. Click **Select "Deal Name"**.

Remove a contact, company or deal from an email

1. To remove a contact, company or deal association from an email, click the **X** beside the name.

View/Edit emails

1. In the **Emails** tab, highlight the email and click the trackwheel.

2. Click **Open**.

3. View/edit the email log.

4. Click the trackwheel.

5. Click **Save**.

Note:

Emails that were sent by you will be represented by a check mark and emails that were received by you will be represented by an envelope.

Related topic

Refer to the Contacts, Companies or Deals section of this manual to learn how to view/edit emails from a contact, company or a deal.

Set priority

The default priority set on emails is normal. To change the priority to High or Low, follow these steps:

1. In the message click the trackwheel. Click **Set Priority**. This will automatically change the email priority to **High**.

2. To change the priority to Low or Normal after setting it to High, highlight the priority and click the trackwheel.

3. Click **Change Option** and select the new priority setting.

Sort emails

Emails can be sorted by subject or by date.

1. In the **Emails** tab, click the trackwheel.

2. Click **Sort by Subject**, for example.

Note:

The first sort performed will be in ascending order and the second will be in descending order.

Delete emails

1. In the **Emails** tab, highlight the email and click the trackwheel.

2. Click **Delete "Email Subject"**.

3. Confirm by clicking **Delete**.

Recent Items

Add recent items

Recent items are automatically stored for quick reference when a record (such as a contact, company, deal, email or activity) is viewed or edited.

View/Edit recent items

1. In the **Recent Items** tab, highlight the item and click the trackwheel.
2. Click **Open**.
3. View/edit the item.
4. Click the trackwheel.
5. Click **Save**.

Delete recent items

1. In the **Recent Items** tab, highlight the item and click the trackwheel.
2. Click **Delete "Item Name"**.
3. Confirm by clicking **Delete**.

Sort recent items

Recent items are automatically sorted by most recent. They can also be sorted by item name.

1. In the **Recent Items** tab, click the trackwheel.
2. Click **Sort by Name**.

Note:

The first sort performed will be in ascending order and the second will be in descending order. The sort order will be automatically saved for the next time you view the contact list.

Call contacts

1. In the **Recent Items** tab, highlight an item that is associated with a contact and click the trackwheel.
2. Click **Call "Contact Name"**.
3. Click **Yes** to allow SalesNOW to initiate the phone call.

Email contacts

1. In the **Recent Items** tab, highlight an item that is associated with a contact and click the trackwheel.
2. Click **Email "Contact Name"**.
3. Type the email subject and body and click the trackwheel.
4. Click **Send**.

Reports

View/Update reports

1. n the **Reports** tab, highlight the report you wish to view/update and click the trackwheel.

2. Click **Open**.

3. Click **Update Report** if you haven't viewed the report previously.

4. Click the trackwheel if you have viewed the report before but wish to update it.

5. Click **Update Report**..

Note:
Must be in radio coverage in order to update the report.

Blackberry Emails

Note:
SalesNOW emails can be sent directly from within the SalesNOW application. However, this section outlines how emails can be sent or received within the BlackBerry **Messages** environment and automatically saved for future reference in the **Emails** tab within SalesNOW.

Compose SalesNOW emails

1. In a BlackBerry messages list, click the trackwheel.

2. Click **Compose SalesNOW Email**.

3. Select an existing contact to email and click the trackwheel.

4. Click **Email "Contact Name"**. If this contact is associated to a company, the company will automatically be associated to the email as well.

5. Type the email subject and body and click the trackwheel.

6. Click **Send** to send the email to the recipients.

Add multiple contacts to a message

To add multiple contacts to a message, in the message click the trackwheel. To add an additional **To** recipient, click **Add SalesNOW To:**. To add a carbon copy (CC) recipient or a blind carbon copy (BCC) recipient, click **Add SalesNOW Cc:** or **Add SalesNOW Bcc:**.

Add a company to an email

1. To add a primary company association to an email, click the trackwheel.

2. Click **Associate with Company**.

3. Select an existing company and click the trackwheel.

4. Click **Select "Company Name"**.

Add a deal to an email

1. To add a deal association to an email, click the trackwheel.

2. Click **Associate with Deal**.

3. Select an existing deal and click the trackwheel.

4. Click **Select "Deal Name"**.

Remove a company or deal from an email

1. To remove a company or deal association from an email, click the **X** beside the name.

Forward SalesNOW emails

1. In a messages list, highlight the email that you'd like to forward and click the trackwheel.

2. Click **Forward to SalesNOW**.

3. Select an existing contact to email and click the trackwheel.

4. Click **Email "Contact Name"**. If this contact is associated to a company, the company will automatically be associated to the email as well.

5. Type the email subject and body and click the trackwheel.

6. Click **Send** to send the email to the recipients.

Save to SalesNOW

1. In a messages list, highlight the email that you'd like to save to SalesNOW and click the trackwheel.

2. Click **Save to SalesNOW**.

3. If you have a contact with a matching email address within SalesNOW, the contact will be automatically associated to the email. If not, click the magnifying glass beside the Contact label.

4. Select an existing contact and click **Select "Contact Name"**.

5. For a new contact, click the **+** beside the Contact label.

6. If this contact is associated to a company, the company will automatically be associated to the email as well. If not, click the magnifying glass beside the Company label. Select an existing company and click **Select "Company Name"**.

7. For a new company, click the **+** beside the Company label.

8. Click the magnifying glass beside the Deal label. Select an existing deal and click **Select "Deal Name"**.

9. Click **Save**.

Send & save to SalesNOW

After you **Compose an Email** in the BlackBerry Messages section, instead of clicking Send – which will simply sends it to the recipients – you can click Send & Save to SalesNOW. This allows you to also save it to SalesNOW, as discussed in the section above.

Set priority

The default priority set on emails is normal. To change the priority to High or Low, follow these steps:

1. In the message click the trackwheel. Click **Set Priority**. This will automatically change the email priority to **High**.

2. To change the priority to Low or Normal after setting it to High, highlight the priority and click the trackwheel.

3. Click **Change Option** and select the new priority setting.

Blackberry Addresses

If you have a contact or company in your BlackBerry Address Book, you may wish to import it into SalesNOW. This procedure will not only add the contact or company into SalesNOW, but it will also automatically associate a contact to its respective company.

1. In the BlackBerry Address Book, highlight the address you wish to add to SalesNOW and click the trackwheel.

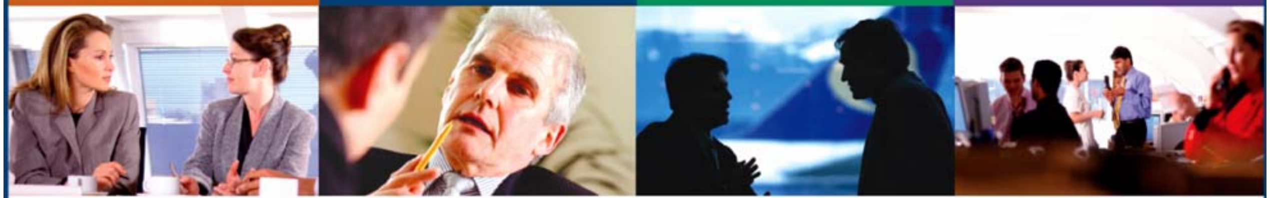
2. Click **Add to SalesNOW**. The system will automatically launch the SalesNOW application and create the new contact record. Type any additional contact information.

3. Click the trackwheel.

4. Click **Save**.

Related Topic

Refer to the “Options: import all contacts from my BlackBerry” section of this manual to learn how to import all of the contacts and companies within your BlackBerry Address Book into SalesNOW.



Sales for the mobile professional

SalesNOW Web Edition

Main Menu

Navigating main tabs

The SalesNOW Web Edition has eight main tabs: **Home; Contacts**; **Companies**; **Deals**; **Emails**; **Activities**; **Reports** and **Calendar**. When SalesNOW launches, it automatically opens the **Home** tab. To move to a different tab, follow these steps:

1. Position your mouse over the tab name. Notice how the mouse pointer changes into a hand. Click on the tab.

2. Once the tab has been selected, notice that the menu bar color changes accordingly.

Note:

Clicking the same tab as the currently active tab (such as the contacts tab) while in a record (such as a contact record) will refresh the tab and display the item list (such as the contacts list).

Related Topic

If you wish to return to the last page that you visited in SalesNOW, click the **Back** button on your Internet browser toolbar. Similarly, to return to the original page, click the **Forward** button on your Internet browser toolbar.

Quick tools: quick search

1. In the main tab menu or from anywhere within the application, highlight **Quick Tools** and click the mouse.

2. Enter the first few characters or the contact name, company name, deal name, email subject or activity subject in the box below **Quick Search**.

3. Highlight **search** and click the mouse.

4. To hide Quick Tools, highlight **Quick Tools** and click the mouse.

Note:

You can move directly to a record in the search results by highlighting the record and clicking the mouse.

Quick tools: quick create

1. In the main tab menu or from anywhere within the application, highlight **Quick Tools** and click the mouse.

2. Highlight the down arrow in the drop down box below **Quick Create** and click the mouse.

3. Highlight the type of record that you would like to create (contact, company, deal or an activity) and click the mouse.

4. To hide Quick Tools, highlight **Quick Tools** and click the mouse.

Related Topic

Refer to the **Contacts**, **Companies**, **Deals** or **Activities** sections below to learn how to add a new contact, company, deal or activity record.

Recent items

Recent items are automatically stored for quick reference when a record (such as a contact, company, deal, email or activity) is viewed or edited.

1. In the main tab menu or from anywhere within the application, highlight **Recent Items** and click the mouse.

2. Highlight the item you wish to view/edit and click the mouse.

3. To hide Recent Items, highlight **Recent Items** and click the mouse.

Recycle bin

The Recycle Bin automatically stores copies of deleted items when a record (such as a contact, company, deal, email or activity record) is deleted. If a record was mistakenly deleted, it may be restored by following these steps:

1. In the main tab menu or from anywhere within the application, highlight **Recycle Bin** and click the mouse.

2. Highlight the item you wish to view/restore and click the mouse.

3. View the record and click **restore** to bring the record back into SalesNOW or click **close** to hide the record and leave it for future discard.

4. To hide the Recycle Bin, highlight **Recycle Bin** and click the mouse.

Note:

Items in the Recycle Bin are only stored for 24 hours.

Page settings

This feature allows you to set the page settings for each of the main tabs within the application.

- In the **Home** tab, Page Settings lets you set: the maximum number of results per list (such as Top Deals, Current Activities and Current Deals) to display; the number of days out that defines a Current Deal and the number of days of that defines a Current Activity.
- In the **Contacts, Companies, Deals, Emails** and **Activities** tabs, Page Settings lets you set the maximum number of results to display at one time (i.e. without having to move to the next page).

1. In the main tab menu or from anywhere within the application (except from within the Reports menu), highlight Page Settings and click the mouse.

2. Highlight the down arrow besides the setting that you'd like to change and click the mouse.

3. Highlight your new setting and click the mouse.

4. Highlight **apply** to change to the new setting and click the mouse.

5. To hide Page Settings, highlight **Page Settings** and click the mouse.

Setup: my account

1. In the main tab menu or from anywhere within the application, highlight **Setup** and click the mouse.

2. Highlight **Account Administration** and click the mouse.

3. View your information and settings and click **close** to hide this information.

Setup: change password

1. In the main tab menu or from anywhere within the application, highlight **Setup** and click the mouse.

2. Highlight **Change Password** and click the mouse.

3. Enter your new password in the first box and re-enter it into the second box and click **apply** to change your password.

Note:
If you change your SalesNOW password on the Web, you must also change your SalesNOW password on the BlackBerry to match; otherwise data synchronization will not occur.

Setup: install on BlackBerry

To install SalesNOW on your BlackBerry, follow these steps to send an email link to the SalesNOW download to your BlackBerry.

1. In the main tab menu or from anywhere within the application, highlight **Setup** and click the mouse.

2. Highlight **Install on BlackBerry** and click the mouse.

3. Highlight **Email Device Installation Link** and click the mouse.

Home

The Home page provides a snapshot of important information and displays six different windows:

- **Current Activities** – this is a list of open activities (i.e. not marked as complete) with a date between today and 30 days out.
- **Current Deals** – this is a list of active deals (i.e. with a status of active) with a call back date set between today and 30 days out.
- **Top Deals** – this is a list of open deals (i.e. with a status of active)
- **Sales History** – this is a graph of the sales history which displays the value of the **closed** deals for the last four months (including the current month).
- **Sales Funnel** – this is a table of **active** deals by probability in 10% increments.
- **Sales Forecast** – this is a graph of sales history which displays the value of both the **active** and **won** deals for the next four months (including the current month).

Note:

To move to a record within a list (i.e. Current Activities, Current Deals or Top Deals) or a table (i.e. Sales Funnel), simply highlight the item and click the mouse.

Related Topic

The **Page Settings** section above describes how to change the maximum number of results per list (such as Top Deals, Current Activities and Current Deals) to display; the number of days out that defines a Current Deal and the number of days out that defines a Current Activity.

Drag and drop windows

1. Highlight the **Orange Bar** at the top of the window that you would like to move and hold the mouse click down.

2. Move the mouse to the location of the screen that you'd like to move the window to and release the mouse click.

Hide/Show a window

1. To hide the contents of a window, highlight the **hide** at the top right of the window and click the mouse.

2. To show the contents of a window, highlight the **show** at the top right of the window and click the mouse.

Contacts

Add contacts

1. In the **Contacts** tab, click **New Contact**.

2. Type the contact information. The contact's last name is a mandatory field.

3. Click **Save & Close** to save this contact and display this contact record, or

4. Click **Save & New** to save this contact and start entering a new contact record, or

5. Click **Cancel** to not save this contact and return to the contacts list.

Note:

To quickly move between fields when entering contact information, press the **TAB** key.

Add a company to a contact

1. To add a company association to a contact, click the magnifying glass.

2. Select an existing company or click the **+** to add a new company record.

Note:

Within the contact information section of a contact record, you can move directly to the associated company record by clicking the company name.

Remove a company from a contact

1. To remove a company association from a contact, click the **X** beside the company name.

View/Edit contacts

1. In the **Contacts** tab, highlight the **Contact's Name** (notice a blue underline under the contact name) and click the mouse.

2. Click **Edit**.

3. View/edit the contact information.

4. Click **Save & Close** to save changes made to the contact, or

5. Click **Cancel**.

Delete contacts

1. In the **Contacts** tab, highlight the contact and click the **X** at the far right of the contact listing, or

2. Click **Delete** while viewing the contact record.

Related Topic

See the Recycle Bin section of this manual for information on how to restore a contact record after it has been deleted.

Clone contacts

Cloning a contact helps save time when entering a new contact record. It copies the contact's key information, such as company association, work address and phone number.

1. In the **Contacts** tab, highlight the contact name to clone and click the mouse.

2. Click **Clone**.

3. Edit the contact information.

4. Click **Save & Close** to save changes made to the new contact record, or

5. Click **Cancel**.

Sort contacts

Contacts can be sorted by last name or by company name.

1. In the **Contacts** tab, click the **Name** column heading to sort by last name, or

2. Click the **Company** column heading to sort by company name.

Note:

The first sort performed will be in ascending order and the second will be in descending order. The sort order will be automatically saved for the next time you view the contact list, and the sort selection can be identified by an **Orange** column heading.

Contacts filter

1. In the **Contacts** tab, click a letter from **A-Z** or **Other** (for a different character) to filter only contacts with a first name or last name beginning with that character, or

2. Click **All** to display all contacts.

Contacts search – basic

1. In the **Contacts** tab, click the empty box beside the **search** title.

2. Enter the search criteria, which can be based on the first few characters of the contact's first or last name.

3. Click **search**.

Contacts search – advanced

1. In the **Contacts** tab, click the **advanced** title.

2. Enter the search criteria, which can be based on any combination of the first few characters of the contact's first or last name and the company name (which is selected by clicking the magnifying glass).

3. Click **search** to search against the criteria, or

4. Click **clear** to clear the search criteria.

Navigating contacts list

If you have more than one page of contacts, the system will display at the top of the list that you are viewing contacts **1-15 of 139** (for example). To move between different pages of contacts, follow these steps:

1. In the **Contacts** tab, click **next** to move to the next page of contacts, or

2. If you are not on the first page of contacts, you may click either **previous** or **next** to move between pages of contacts.

Related Topic

See the **Page Settings** section of this manual to learn how to change the number of contacts that can be viewed on a single page.

Get map for contacts

1. In the **Contacts** tab, highlight the contact name and click the mouse.

2. Click **View Map** below either the contact's Work Address or Personal Address (depending on which one that you wish to view).

Note:

The mapping feature is utilizing Google Maps and will launch a separate window. For best results, please ensure that the address details are complete.

Add a new deal, email log or an activity to a contact

The benefit of adding a new deal, email log or an activity from within a contact record is that the system will automatically associate it to that contact.

1. In the **Contacts** tab, highlight the contact to which you wish to add a new deal, email log or activity to and click the mouse.

2. Click **new** on the title bar for **deals**, **emails or activities**, depending on what you'd like to add.

3. Type the new deal, email log or activity information.

4. Click **Save & Close** to save your new entry, or

5. Click **Cancel**.

Related Topic

Refer to the Deals, Emails or Activities section of this manual to learn another way to enter a new deal, email log or activity.

View/Edit deals, emails or activities for contacts

1. In the **Contacts** tab, highlight the contact to which you wish to view/edit deals, emails or activities and click the mouse.

2. Click **show** on the title bar for **deals**, **emails or activities**, depending on what you'd like to view/edit. If the **show** button has already been pressed, you can skip this step.

3. Highlight the deal, email or activity that you wish to view/edit and click the mouse.

4. Click **Edit** to modify the information.

5. Type any changes.

6. Click **Save & Close** to save your changes, or

7. Click **Cancel**.

Related Topic

Refer to the Deals, Emails or Activities section of this manual to learn another way to edit deals, emails or activities.

Companies

Add companies

1. In the **Companies** tab, click **New Company**.

2. Type the company information. The company name is a mandatory field.

3. Click **Save & Close** to save this company and display this company record, or

4. Click **Save & New** to save this company and start entering a new company record, or

5. Click **Cancel** to not save this company and return to the companies list.

Note:

To quickly move between fields when entering company information, press the **TAB** key.

View/Edit companies

1. In the **Companies** tab, highlight the **company name** (notice a blue underline under the company name) and click the mouse.

2. Click **Edit**.

3. View/edit the company information.

4. Click **Save & Close** to save changes made to the company, or

5. Click **Cancel**.

Delete companies

1. In the **Companies** tab, highlight the contact and click the **X** at the far right of the company listing, or

2. Click **Delete** while viewing the company record.

Related Topic

See the Recycle Bin section of this manual for information on how to restore a company record after it has been deleted.

Clone companies

1. Cloning a company helps save time when entering a new company record. It copies the company's key information, such as address and phone number.

2. In the **Companies** tab, highlight the company name to clone and click the mouse.

3. Click **Clone**.

4. Edit the company information.

5. Click **Save & Close** to save changes made to the new company record, or

6. Click **Cancel**.

Sort companies

Companies can be sorted by company name in ascending or descending order.

1. In the **Companies** tab, click the **Name** column heading to sort in descending order.

2. Click the **Name** column heading again to sort in ascending order.

Note:

The sort order will be automatically saved for the next time you view the contact list.

Companies filter

1. In the **Companies** tab, click a letter from **A-Z** or **Other** (for a different character) to filter only companies with a name beginning with that character, or

2. Click **All** to display all contacts.

Companies search – basic

1. In the **Companies** tab, click the empty box beside the **search** title.

2. Enter the search criteria, which can be based on the first few characters of the company's name.

3. Click **search**.

Companies search - advanced

1. In the **Companies** tab, click the **advanced** title.

2. Enter the search criteria, which can be based on any combination of the first few characters of the company's name, industry or city.

3. Click **search** to search against the criteria, or

4. Click **clear** to clear the search criteria.

Navigating companies list

If you have more than one page of companies, the system will display at the top of the list that you are viewing companies **1-15 of 98** (for example). To move between different pages of companies, follow these steps:

1. In the **Companies** tab, click **next** to move to the next page of companies, or

2. If you are not on the first page of companies, you may click either **previous** or **next** to move between pages of companies.

Related Topic

See the **Page Settings** section of this manual to learn how to change the number of companies that can be viewed on a single page.

Get map for companies

1. In the **Companies** tab, highlight the company name and click the mouse.

2. Click **View Map** below the company address.

Note:

The mapping feature is utilizing Google Maps and will launch a separate window. For best results, please ensure that the address details are complete.

Add a new contact, deal, email log or an activity to a company

The benefit of adding a new contact, deal, email log or an activity from within a company record is that the system will automatically associate it to that company.

1. In the Companies tab, highlight the company to which you wish to add a new contact, deal, email log or activity and click the mouse.

2. Click new on the title bar for contacts, deals, emails or activities, depending on what you'd like to add.

3. Type the new contact, deal, email log or activity information.

4. Click **Save & Close** to save your new entry, or

5. Click **Cancel**.

Related Topic

Refer to the Contacts, Deals, Emails or Activities section of this manual to learn another way to enter a new contact, deal, email log or activity.

View/Edit contacts, deals, emails or activities for companies

1. In the **Companies** tab, highlight the company to which you wish to view/edit contacts, deals, emails or activities and click the mouse.

2. Click **show** on the title bar for **contacts, deals**, **emails or activities**, depending on what you'd like to view/edit. If the **show** button has already been pressed, you can skip this step.

3. Highlight the contact, deal, email or activity that you wish to view/edit and click the mouse.

4. Click **Edit** to modify the information.

5. Type any changes.

6. Click **Save & Close** to save your changes, or

7. Click **Cancel**.

Related Topic

Refer to the Contacts, Deals, Emails or Activities section of this manual to learn another way to view/edit contacts, deals, emails or activities.

Deals

Add deals

1. In the **Deals** tab, click **New Deal**.

2. Type the deal information. The deal name is a mandatory field.

3. Click **Save & Close** to save this deal and return and display this deal record, or

4. Click **Save & New** to save this deal and start entering a new deal record, or

5. Click **Cancel** to not save this deal and return to the deals list.

Note:
To quickly move between fields when entering deal information, press the **TAB** key.

Add a primary contact to a deal

1. To add a primary contact association to a deal, click the magnifying glass to select an existing contact, or click **+** to create a new contact. If this contact is associated to a company, the company will automatically be associated to the deal as well.

Note:
Within the deal information section of a deal record, you can move directly to the associated contact record by clicking the contact name.

Add additional contact associations to a deal

1. To add additional contact associations to a deal, follow these steps:

2. Open the deal record and click **new** on the title bar for **contacts**.

3. Click the magnifying glass. Select an existing contact or click **New Contact** to add a new contact record.

Change primary contact for a deal

To change the primary contact for a deal, follow these steps:

1. Open the deal record and click **edit** on the title bar for **contacts**.

2. Click the **primary** box beside the contact that you wish to make primary.

Add a company to a deal

1. To add a company association to a deal, click the magnifying glass to select an existing company or click the **+** to add a new company record.

Note:
Within the deal information section of a deal record, you can move directly to the associated company record by clicking the company name.

Add additional company associations to a deal

To add additional company associations to a deal, follow these steps:

1. Open the deal record and click **new** on the title bar for **companies**.

2. Click the magnifying glass to select an existing company or the **+** to add a new company record.

Change primary company for a deal

To change the primary company for a deal, follow these steps:

1. Open the deal record and click **edit** on the title bar for **companies**.

2. Click the **primary** box beside the company that you wish to make primary.

Remove a contact or a company from a deal

1. To remove a contact or a company association from a deal, click the **X** beside the contact or company name.

View/Edit deals

1. In the Deals tab, highlight the deal name (notice a blue underline under the deal name) and click the mouse.

2. Click **Edit**.

3. View/edit the deal information.

4. Click **Save & Close** to save changes made to the deal, or

5. Click **Cancel**.

Delete deals

1. In the Deals tab, highlight the deal and click the **X** at the far right of the deal listing, or

2. Click **Delete** while viewing the deal record.

Related Topic
See the **Recycle Bin** section of this manual for information on how to restore a deal record after it has been deleted.

Clone deals

Cloning a deal helps save time when entering a new deal record. It copies the deal's key information, such as contact and company association, deal type and lead source.

1. In the Deals tab, highlight the deal name to clone and click the mouse.

2. Click **Clone**.

3. Edit the deal information.

4. Click **Save & Close** to save changes made to the new deal record, or

5. Click **Cancel**.

Sort deals

Contacts can be sorted in a number of ways, including by deal name, contact name, company name, estimated value, probability, close date, call back date or deal status.

1. In the **Deals** tab, click the column heading, such as **Est. Value**, that you wish to sort by.

Note:
The first sort performed will be in ascending order and the second will be in descending order. The sort order will be automatically saved for the next time you view the deals list, and the sort selection can be identified by an **Orange** column heading.

Deals filter

1. In the **Deals** tab, you can filter by deal status by clicking **Active**, **Won** or **Lost**, or

2. Click **All** to display all deals.

Deals search – basic

1. In the **Deals** tab, click the empty box beside the **search** title.

2. Enter the search criteria, which can be based on the first few characters of the deal's name.

3. Click **search**.

Deals search – advanced

1. In the Deals tab, click the **advanced** title.

2. Enter the search criteria, which can be based on any combination of the first few characters of the deal's name, status, probability, company name, contact name, closing from or closing to dates. (Contact and company names are selected by clicking the magnifying glass).

3. Click **search** to search against the criteria, or

4. Click **clear** to clear the search criteria.

Navigating deals list

If you have more than one page of deals, the system will display at the top of the list that you are viewing deals **1-15 of 45** (for example). To move between different pages of deals, follow these steps:

1. In the **Deals** tab, click **next** to move to the next page of deals, or

2. If you are not on the first page of deals, you may click either **previous** or **next** to move between pages of deals.

Related Topic

See the **Page Settings** section of this manual to learn how to change the number of deals that can be viewed on a single page.

Add a new contact, company, email log or an activity to a deal

The benefit of adding a new contact, company, email log or an activity from within a deal record is that the system will automatically associate it to that deal.

1. In the **Deals** tab, highlight the deal to which you wish to add a new contact, company, email log or activity to and click the mouse.
2. Click **new** on the title bar for **contacts, companies**, **emails or activities**, depending on what you'd like to add.
3. Type the new contact, company, email log or activity information.
4. Click **Save & Close** to save your new entry, or
5. Click **Cancel**.

Related Topic

Refer to the Contacts, Companies, Emails or Activities section of this manual to learn another way to enter a new contact, company, email log or activity.

View/Edit contacts, companies, emails or activities for deals

1. In the **Deals** tab, highlight the deal to which you wish to view/edit contacts, companies, emails or activities and click the mouse.
2. Click **show** on the title bar for **contacts, companies**, **emails or activities**, depending on what you'd like to view/edit. If the **show** button has already been pressed, you can skip this step.
3. Highlight the contact, company, email or activity that you wish to view/edit and click the mouse.
4. Click **Edit** to modify the information.
5. Type any changes.
6. Click **Save & Close** to save your changes, or
7. Click **Cancel**.

Note:

Within the deal information section of a deal record, you can move directly to either the contact or company record by clicking the contact or company name.

Related Topic

Refer to the Contacts, Deals, Emails or Activities section of this manual to learn another way to edit deals, emails or activities.

Emails

Add emails

Emails created within SalesNOW on the BlackBerry are automatically saved to SalesNOW on the WEB. SalesNOW on the WEB does not allow you to create emails directly (this feature will be available in April 2007).

Related Topic

See either the **Emails** or the **BlackBerry Emails** chapter of the **SalesNOW for the BlackBerry** section of this manual for information on how to compose a SalesNOW email or save a regular BlackBerry email to SalesNOW.

Add a primary contact to an email

1. To add a primary contact association to an email, click the magnifying glass to select an existing contact or click **+** to add a new contact record. If this contact is associated to a company, the company will automatically be associated to the email as well.

Note:

Within the email information section of an email record, you can move directly to the associated contact record by clicking the contact name.

Add additional contact associations to an email

To add additional contact associations to an email, follow these steps:

1. Open the email and click new on the title bar for contacts.

2. Click the magnifying glass to select an existing contact or click **+** to add a new contact record.

Change primary contact for an email

To change the primary contact for an email, follow these steps:

1. Open the email record and click edit on the title bar for contacts.

2. Click the primary box beside the contact that you wish to make primary.

Add a company to an email

1. To add a company association to an email, click the magnifying glass to select an existing company or click **+** to add a new company record.

Note:

Within the email information section of an email record, you can move directly to the associated company record by clicking the company name.

Add additional company associations to an email

To add additional company associations to an email, follow these steps:

1. Open the email record and click **new** on the title bar for **companies**.

2. Click the magnifying glass to select an existing company or click + to add a new company record.

Change primary company for an email

To change the primary company for an email, follow these steps:

1. Open the email record and click **edit** on the title bar for **companies**.

2. Click the **primary** box beside the company that you wish to make primary.

Add a deal to an email

1. To add a deal association to an email, click the magnifying glass to select an existing deal or click + to add a new deal record.

Note:
Within the email information section of an email record, you can move directly to the associated deal record by clicking the deal name.

Remove a contact, company or a deal from an email

1. To remove a contact, company or deal association from an email, click the X beside the contact, company or deal name.

View/Edit emails

1. In the **Emails** tab, highlight the **email date & time** (notice a blue underline under the email date & time) and click the mouse.

2. Click **Edit**.

3. View/edit the email information.

4. Click **Save & Close** to save changes made to the email, or

5. Click **Cancel**.

Note:
Emails that were sent by you will be represented by a check mark and emails that were received by you will be represented by an envelope. Emails that were set at high priority will be represented by a red exclamation mark.

Delete emails

1. In the **Emails** tab, highlight the email and click the **X** at the far right of the email listing, or

2. Click **Delete** while viewing the email record.

Related Topic

See the **Recycle Bin** section of this manual for information on how to restore an email record after it has been deleted.

Sort emails

Emails can be sorted in a number of ways, including by date, contact, company or subject.

1. In the **Emails** tab, click the column heading, such as **Contact**, that you wish to sort by.

Note:

The first sort performed will be in ascending order and the second will be in descending order. The sort order will be automatically saved for the next time you view the emails list, and the sort selection can be identified by an **Orange** column heading.

Emails filter

1. In the **Emails** tab, you can filter by email origin by clicking **To Me**, **From Me**, or

2. Click **All** to display all emails.

Emails search – basic

1. In the **Emails** tab, click the empty box beside the **search** title.

2. Enter the search criteria, which can be based on the first few characters of the email's subject.

3. Click **search**.

Emails search - advanced

1. In the **Emails** tab, click the **advanced** title.

2. Enter the search criteria, which can be based on any combination of the first few characters of the email's subject, contact name, company name, and deal name, from or to dates. (Contact, company or deal names are selected by clicking the magnifying glass).

3. Click **search** to search against the criteria, or

4. Click **clear** to clear the search criteria.

Navigating emails list

If you have more than one page of emails, the system will display at the top of the list that you are viewing emails **1-15 of 235** (for example). To move between different pages of emails, follow these steps:

1. In the Emails tab, click next to move to the next page of emails, or

2. If you are not on the first page of deals, you may click either previous or next to move between pages of emails.

Related Topic

See the **Page Settings** section of this manual to learn how to change the number of emails that can be viewed on a single page.

View/Edit contacts or companies for emails

1. In the **Emails** tab, highlight the email to which you wish to view/edit contacts or companies and click the mouse.

2. Click **show** on the title bar for **contacts or companies**, depending on what you'd like to view/edit. If the **show** button has already been pressed, you can skip this step.

3. Highlight the contact or company that you wish to view/edit and click the mouse.

4. Click **Edit** to modify the information.

5. Type any changes.

6. Click **Save & Close** to save your changes, or

7. Click **Cancel**.

Activities

Add activities

1. In the Activities tab, click **New Activity**.

2. Type the activity information. The activity name is a mandatory field.

3. Click **Save & Close** to save this activity and display this activity record, or

4. Click **Save & New** to save this activity and start entering a new activity, or

5. Click **Cancel** to not save this activity and return to the activities list.

Note:
To quickly move between fields when entering activity information, press the **TAB** key.

Add a primary contact to an activity

1. To add a primary contact association to an activity, click the magnifying glass to select an existing contact or click **+** to add a new contact record. If this contact is associated to a company, the company will automatically be associated to the activity as well.

Note:
Within the activity information section of an activity record, you can move directly to the associated contact record by clicking the contact name.

Add additional contact associations to an activity

To add additional contact associations to an activity, follow these steps:

1. Open the activity record and click **new** on the title bar for **contacts**.

2. Click the magnifying glass to select an existing contact or click **+** to add a new contact record.

Change primary contact for an activity

To change the primary contact for an activity, follow these steps:

1. Open the activity record and click **edit** on the title bar for **contacts**.

2. Click the **primary** box beside the contact that you wish to make primary.

Add a company to an activity

1. To add a company association to an activity, click the magnifying glass to elect an existing company or click **+** to add a new company record.

Note:
Within the activity information section of an activity record, you can move directly to the associated company record by clicking the company name.

Add additional company associations to an activity

1. To add additional company associations to an activity, follow these steps:

2. Open the activity record and click **new** on the title bar for **companies**.

3. Click the magnifying glass to select an existing company or click **+** to add a new company record.

Change primary company for an activity

To change the primary company for an activity, follow these steps:

1. Open the activity record and click **edit** on the title bar for **companies**.

2. Click the **primary** box beside the company that you wish to make primary.

Add a deal to an activity

1. To add a deal association to an activity, click the magnifying glass to select an existing deal or click **+** to add a new deal record.

Note:
Within the activity information section of an activity record, you can move directly to the associated deal record by clicking the deal name.

Remove a contact, company or deal from an activity

1. To remove a contact, company or deal association from an activity, click the **X** beside the contact, company or deal name.

View/Edit activities

1. In the **Activities** tab, highlight the **activity name** (notice a blue underline under the activity name) and click the mouse.

2. Click **Edit**.

3. View/edit the activity information.

4. Click **Save & Close** to save changes made to the activity, or click **Cancel**.

Delete activities

1. In the Activities tab, highlight the activity and click the **X** at the far right of the activity listing, or

2. Click **Delete** while viewing the activity record.

Related Topic

See the Recycle Bin section of this manual for information on how to restore an activity record after it has been deleted.

Clone activities

Cloning an activity helps save time when entering a new activity record. It copies the key activity information, such as contact, company and deal association, type, status and priority.

1. In the **Activities** tab, highlight the activity name to clone and click the mouse.

2. Click **Clone**.

3. Edit the activity information.

4. Click **Save & Close** to save changes made to the new activity record, or

5. Click **Cancel**.

Sort activities

Contacts can be sorted in a number of ways, such as by date, type, subject, contact name, company name or by status.

1. In the **Activities** tab, click the column heading, such as **Date**, that you wish to sort by.

Note:

The first sort performed will be in ascending order and the second will be in descending order. The sort order will be automatically saved for the next time you view the activities list, and the sort selection can be identified by an **Orange** column heading.

Activities filter

1. In the **Activities** tab, you can filter by activity date by clicking **Current**, **Overdue** or **Future**, or

2. Click **All** to display all activities.

Activities search – basic

1. In the **Activities** tab, click the empty box beside the **search** title.

2. Enter the search criteria, which can be based on the first few characters of the activity subject name.

3. Click **search**.

Activities search – advanced

1. In the **Activities** tab, click the **advanced** title.

2. Enter the search criteria, which can be based on any combination of the first few characters of the activity's subject name, the contact name, company name, deal name and the date range.

3. Click **search** to search against the criteria, or

4. Click **clear** to clear the search criteria.

Navigating activities list

If you have more than one page of activities, the system will display at the top of the list that you are viewing activities **1-15 of 122** (for example). To move between different pages of activities, follow these steps:

1. In the **Activities** tab, click **next** to move to the next page of activities, or

2. If you are not on the first page of activities, you may click either **previous** or **next** to move between pages of activities.

Related Topic

See the **Page Settings** section of this manual to learn how to change the number of activities that can be viewed on a single page.

View/Edit contacts or companies for activities

1. In the **Activities** tab, highlight the contact to which you wish to view/edit contacts or companies and click the mouse.

2. Click **show** on the title bar for **contacts** or **companies**, depending on what you'd like to view/edit. If the **show** button has already been pressed, you can skip this step.

3. Highlight the contact or company that you wish to view/edit and click the mouse.

4. Click **Edit** to modify the information.

5. Type any changes.

6. Click **Save & Close** to save your changes, or

7. Click **Cancel**.

Reports

The Reports page provides three reports that you can generate in a Microsoft Excel compatible format. The report choices are:

- **activities & emails by month** – this is a report of completed activities (i.e. tasks and call logs) and sent and received emails by month.
- **sales forecast by month** – this is a report of both **active** and **closed** deals by month.
- **sales history by month** – this is a report of closed deals by month.

Generating reports

To generate a report, complete the report parameters for the report that you would like to run.

1. If you'd like to run the report based on the data for a specific company, highlight the magnifying glass beside the **Company** field and click the mouse and select the company, otherwise leave the field blank and the report will be based on all companies.

2. If you'd like to run the report based on the data for a specific deal, highlight the magnifying glass beside the **Deal** field and click the mouse and select the deal, otherwise leave the field blank and the report will be based on all deals.

3. To set the date range for the report, highlight the calendar icon beside the **From** field and click the mouse. Select the date and click the mouse. Next, highlight the calendar icon beside the **To** field and click the mouse. Select the date and click the mouse.

4. For the **activities and emails by month** report, select the items to include in the report by highlighting the box beside the item (call logs, emails and tasks) and clicking the mouse.

5. To generate the report based on the selected parameters, highlight **generate** and click the mouse.

6. To clear the report parameters, highlight **clear** and click the mouse.

Calendar

The Calendar page provides a unique calendar based view to your activities. The views available are:

- **Day View** – this view shows you the activities for a particular day.
- **Week View** – this view shows you the activities for a particular week.
- **Month View** – this view shows you the activities for a particular month.

Filtering activities

With the different calendar views you can filter the activities to focus on the items that are important to you.

- **Meetings**– this will show you only the activities that are classified as meetings.
- **Tasks** – this will show you only the activities that are classified as tasks.
- **Call Logs**– this will show you only the activities that are classified as call logs.
- **All** – this will show you all activities.

Calendar navigation

As with most calendars you can navigate between days and months.

In the middle of the screen there are two arrows (left and right) with a calendar icon. Clicking the calendar icon will display a small calendar which will allow you to select any particular day, week, or month (depending on what calendar view is currently active).

The left and right arrows beside the calendar icon allow you to move backward (left arrow) or forward (right arrow) one day, week, or month (depending on what calendar view is currently active).

You can always know what view you are looking at by the description in the middle of the screen. For example, if you are looking at a month view, the description will state Month Year (i.e. March 2007).

In the upper left corner of the screen is the current date. Putting the mouse over the date will highlight it (with an underline under the date). Clicking on the date with your mouse will take you to the current day in the calendar.

Opening activities

From the calendar view you can open any activity by directly clicking on it.

This will open the activity screen displaying the activity details. You can view the activity and make any necessary changes to it.

Click the Internet browser back button to return to the Calendar screen.

Frequently Asked Questions

Q: What is SalesNOW?

A: SalesNOW is a BlackBerry CRM solution designed specifically for the highly mobile small and midsize business (SMB) sales team. It is an extension of the BlackBerry's core email and activity management technology and gives users full access to their critical sales and business data. Its BlackBerry-centric design works the way a mobile sales professional works when managing deals with tight integration to BlackBerry Calendaring, Call Logging, and Emails.

In addition, all information entered on the BlackBerry is synchronized to the SalesNOW website. When back in the office, the hosted SalesNOW website allows users to manage contact, activity, and deal information and output forecast and activity reports all through the Internet.

Q: What do I get when I sign up for SalesNOW CRM for the BlackBerry?

A: SalesNOW users can:

1. Manage contacts
   1. Store contact info, send emails, make phone calls, get Google maps
   2. Synchronize BlackBerry contacts to SalesNOW easily

2. Track activities and email
   1. Associate call logs, tasks and emails to deals for quick history retrieval
   2. Easily move emails from your inbox to SalesNOW for better organization

3. Manage deals
   1. Track sales details, progress and next steps on deals
   2. Manage your sales pipeline while on the road

4. Access via BlackBerry or Internet
    1. Use the Internet version to access all the same information while at home
    2. View graphs on the BlackBerry and export custom activity reports to Excel

5. Share across your team with SalesNOW Team Edition
    1. Team leader can access and view information for team members
    2. Rollup activity and forecast reports for team members

Q: What is the size of SalesNOW on my BlackBerry?

A: The size of the SalesNOW application installed on the BlackBerry is approximately 390k. There is no cost to download and install the application on your BlackBerry.

Q: How much data is transferred each month using SalesNOW?

A: SalesNOW utilizes a special algorithm to ensure the minimum amount of data is transferred between the server and the BlackBerry handheld device. This ensures that only pertinent data is synchronized and keeps the data charges for the user to a minimum.

The amount of data transferred depends on the usage level and how much data you enter and store in SalesNOW. Following are some data usage example for wireless synchronization over a 30-day period. This includes the creation of new records as well as changes to existing records.

Usage Level	Records	Data Usage
Low	150	155k
Medium	300	310k
High	600	620k

Q: What are the minimum requirements to run SalesNOW on my BlackBerry?

A: The minimum requirement to run SalesNOW on a BlackBerry is a device running Operating System (OS) 4.0 or higher.

Q: Does SalesNOW use BES or BIS network communication?

A: SalesNOW uses both the BlackBerry Enterprise Server (BES) and BlackBerry Internet Service (BIS). As a user, you decide what type communication platform you prefer. This can be done from the Options screen within SalesNOW on your BlackBerry.

Q: I am using SalesNOW in a BES environment but it does not seem to synchronize. What is wrong?

A: If you wish to use SalesNOW with in a BES environment, you will have to ensure the BES server within your company provides appropriate accesses rights to the SalesNOW Internet server.

If you are using the BES communication setting in SalesNOW on your BlackBerry, and are unable to transfer data to and from the SalesNOW Internet sever, the most common cause is a setting on your company's BES Server.

Ask your BES Administrator, usually from your company's IT group, to allow SalesNOW access via the BES server.

Q: Does SalesNOW use SSL for security?

A: Yes. For users that utilize BIS for the communication platform, you can select to use SSL from the Option screen.

Q: How do I access SalesNOW through the Internet?

A: All information entered via SalesNOW on your BlackBerry is automatically synchronized to our secure SalesNOW server. You can access all your information via the SalesNOW website by visiting www.salesnow.com through your Internet browser on your computer. From the SalesNOW home page on the Internet, enter your login information to gain access to the SalesNOW application.

Q: What can I do if I forget my password?

A: You can have your password sent to you by accessing www.salesnow.com through an Internet browser on any Internet connected computer. Click the "Forgot Your Password?" link on the login screen and follow the instructions to have your password reset.

Q: How do I access my data if I upgrade or change my BlackBerry?

A: Before you change your BlackBerry, open SalesNOW and perform a manual synchronization with the SalesNOW server to ensure all data in SalesNOW is safely stored on the SalesNOW website. You perform a manual synchronization from SalesNOW on your BlackBerry by selecting "*Synchronize*!" from the main menu.

On your new BlackBerry install SalesNOW (following the instructions provided previously within this document). Open SalesNOW and from the "*Options*" screen, select the "*Refresh all data from the server*" option. This will download all data stored on the SalesNOW website. Once complete, SalesNOW on your BlackBerry will be completely up to date with all your latest sales and contact management data.

Q: Does SalesNOW support different languages?

A: Yes, SalesNOW supports English, French, French Canadian, German, Italian, Portuguese, Spanish, and Chinese.