FootSteps Made Easy

FOOTSTEPS™

Your Guide to Getting Started

FootSteps.net

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About this guide

Like starting with any new software program you need to jump in and start exploring what you can do with the program. This guide contains the "how to's" for your reference; however we hope it was a waste of time publishing because the program is so intuitive and easy to use you just might not need the tutoring.

FootSteps at a glance

OK, let's say you are doing everything right and you are getting more leads than ever before. Now's the time to handle these leads effectively, and that means engaging the consumer in a conversation.

ARI's FootSteps provides manufacturers and dealers with an electronic means of logging and tracking all in-store customer visits, inbound/outbound sales calls and Internet leads, providing the ability to better manage the efforts of sales staff for accountability and follow-up. Then close the loop with FootSteps marketing automation and lead follow-up system.

The more inventory and lead management solutions communicate, the more effectively you can put the right people into the right unit. Timely customer communication is made simple by automating highly engaging communication and information. Save time, reduce frustration, drive traffic, promote inventory and improve consumer response.

FootSteps greatest attribute is its flexibility to support your sales processes rather than you having to change your process to adapt to FootSteps.

Features:

- **Saves time and increases productivity:** FootSteps automates portions of the sales process to ensure that every lead is taken care of properly and that no lead falls through the cracks. Implementing a regular follow-up program typically results in close rates 30% to 50% higher than average
- **Nurtures customers and prospects:** Designed to completely automate follow up when the visitor submits an online lead, places a telephone call, fills out an online credit application, schedules a service appointment, or some similar event. Nurturing leads throughout the buying cycle is crucial to the short- and long-term growth of your business
- **Shortens response time and sales cycle:** FootSteps automates portions of the sales management process and enables actions to be cascaded, assigned, tracked, updated, and reported on in one easy-to-use tool.
- **Delivers a consistent, professional message:** Your sales team will follow up more efficiently and professionally, FootSteps is a cost-effective tool to communicate with prospects and customers.
- **Increases sales**: All the information your teams need in one place, all the time**.** Follow up, manage and nurture ALL inquiries from – trade shows, email, phone, walk-ins and more.
- **Improves communications and accountability**: Buyers are willing to build a one-on-one connection when they receive information more pertinent to his or her interests.

- **Builds customer loyalty:** Prospect categorization, template-driven eMail marketing, calendar management, and reminders are among the many FootSteps features designed to foster customer relationships and stay in touch with them long term.
- **Enhances brand recognition:** “Be there” and top of mind, without ongoing effort on your part and to keep prospects engaged when they are not quite ready.

Note: For a period of time there will be direct access to the older version (Classic View) of FootSteps from the Dashboard. If you get stuck and can’t figure out how to something in the new version you might want to or need to do the task in the Classic Version. Whatever customer data you make changes to both versions will be updated. Hopefully you won’t need to do this often but if you do so, a best practice has been to right click the Classic View button and open in a new tab or window saving time going back and forth.

Our intention is not to support two versions of FootSteps and learning how to do the task in the new version will be necessary. Please let us know what you can’t find and we will help you do it!

Getting started

Here are just a few introductory topics we need to talk about before we can show you how to use FootSteps.

System requirements

If can get to Google you have an Internet connection good enough to access FootSteps. You do not need to install any special software.

The current supported and tested environments for FootSteps include:

- Firefox (recommended)
- Chrome (recommended)
- Safari (recommended)
- Internet Explorer 8, 9

Note: FootSteps doesn't currently work fully in IE10. Users have found that running FootSteps in IE10 Compatibility Mode will work for most tasks.

You can also use your Smart Phone to navigate to FootSteps – though most Smart Phone browsers are not capable of rendering HTML editors. *As a result you may find that you are unable to edit/create HTML emails from your Smart Phone or PDA.*

FootSteps requires JavaScript and Cookies in order to operate. So, if you are having problems logging in (particularly from a phone), it is very likely that you have to configure your security settings.

Logging in

1. To login in to FootSteps, type **www.FootSteps.net** in the address bar of your browser.
2. Type your LOGIN and PASSWORD issued by the ARI personnel or your company's FootSteps administrator. Passwords are case sensitive.

3. Click **Submit**. The FootSteps Dashboard appears.

Getting support

If you have questions about FootSteps, contact the ARI Support Team.

Sales » 800-755-6040   **Support »** 800-558-9044

You can also complete the online form on the FootSteps Customer Support page.

Understanding your user role

In FootSteps there are three types of users:

- **Enterprise Managers** can access all setup functions in FootSteps, see all customers, assign customers, and can inactivate or activate users.
- **Sales Assistants** can view all customers and assign customers.
- **Sales Associates** can view customers assigned to them or the customers they enter. A preference can also be selected to have Sales Associates see customers assigned to other associates in a read-only or add only notes basis.

Note: Let's say your company initially had FootSteps set up with 6 seats: one Enterprise Manager, three Sales Assistants, and two Sales Associates. But, you recently hired two additional employees and now want to add them into FootSteps. You need to contact ARI Support to have the two additional seats added, and then you can add your new employees to FootSteps.

Setting up FootSteps to support your sales processes

This section of the guide is for Enterprise Managers.

Checklist for Enterprise Managers

Setting Up FootSteps checklist

To get FootSteps ready for all other users, review the high-level list of the tasks you need to complete.

While it might seem like a lot to get ready, keep in mind that many of the tasks only have a few steps to complete.

Remember: If you need help performing any of these tasks, this guide contains the detailed steps to help you through the process. **Click the tasks below to go directly to the instructions**.

Print this page to help you keep track of your progress.

Set up tasks:	Completed:
1. Add departments	☐
2. Add additional users	☐
3. Create email templates	☐
4. Add letter templates for printing	☐
5. Add lead sources	☐
6. Add customer sources	☐
7. Add sales stages	☐
8. Set up sales steps	☐

Managing departments

As an Enterprise Manager, you can easily add and edit departments in FootSteps to meet business needs.

> **Reminder**: when setting up FootSteps for the first time, organize your departments first and then add users.

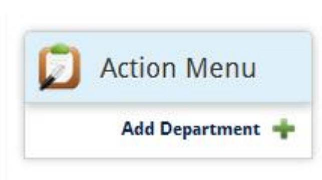
Adding departments

Follow the steps below to add your company's departments to FootSteps.

1. Select **Settings** on the right side of the top navigation.

2. Select **Manage Departments** in the User and Company Settings section.

3. Select **Add Department** from the Action Menu.



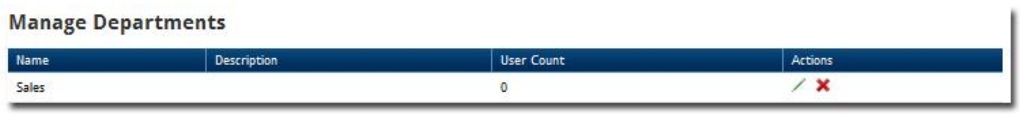
4. Type the name of the department. (Example: Sales, Service, Parts/Service, Management, and Corporate.)
5. Type a brief description if the department name needs more detail.
6. Click **Save**.
7. Repeat these steps until you add all of the necessary departments to FootSteps. If the FootSteps account supports multiple locations, you must setup departments for each location.

Editing or deleting departments

Editing or deleting departments in FootSteps just takes a few simple steps. Only Enterprise Managers have the option to make changes or delete departments.

1. Select **Manage Departments** in the User and Company Settings section.

2. On the Manage Departments page, click to edit or to delete an existing department.



Manage Departments

Name	Description	User Count	Actions
Sales		0	

When editing a department, make the necessary changes and click **Save**. If you are deleting a department, confirm that you want to delete the department, and click **OK**.

Managing users

Only Enterprise Managers can add or make changes to users in FootSteps.

> **Note**: Let's say your company initially had FootSteps set up with 6 seats: one Enterprise Manager, three Sales Assistants, and two Sales Associates. But, you recently hired two additional employees and now want to add them into FootSteps. You need to contact ARI Support to have the two additional seats added, and then you can add your new employees to FootSteps.

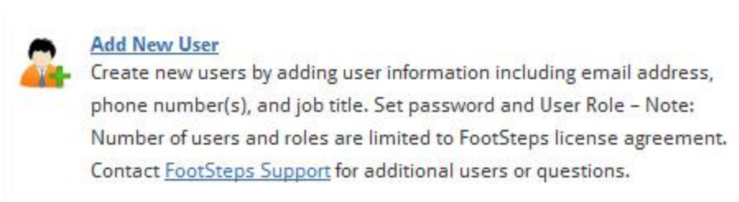
Adding additional users

If you are initially setting up FootSteps, we recommend that you add departments first before adding users.

Follow the steps below to add users.

1. Select **Settings** on the right side of the top navigation.

2. Select **Add New User** from the User and Company Settings section. If the account supports multiple locations, select the location first before adding a user to the desired location.



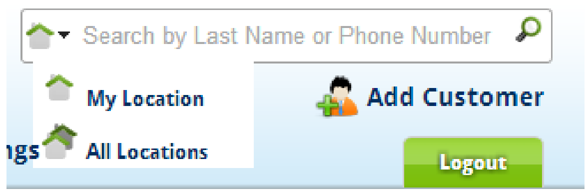
3. Complete the fields for each new user.

Field:	Definition:
User Name	Type a user name. You can use any letter, number, hyphen, underscore, or period to create the user name. For example: john.smith or john_smith. We suggest using the **first.last** format (john.smith) for greater anti-spam protection. Keep in mind that customers see this field as the prefix of the FootSteps email address.
Password	Enter a temporary password. Users can change and manage their own passwords after they gain access to FootSteps.
User Role	Select the role that identifies this user. If you need more users added to this list, please contact ARI Support.

Field:	Definition:
	Enterprise Manager: this user role has the ability to access all setup functions in FootSteps, see all customers, assign customers, and add or delete users **Sales Assistants**: this user role has the ability to see all customers and assign customers. **Sales Associates**: this user role has the ability to see customers who are assigned to them or entered by them. **Note**: An optional ability allows Sales Associates to view all customers at their location or across locations. This is a read-only setting that allows access to the other salespeople's customers and the ability to add notes. Sales people not assigned to a customer cannot edit or email the customer from FootSteps.
First Name **Last Name**	Type the user's first name and last name. Use Title Case for proper rendering for Merge Codes and the From field in emails.
Email Address	Enter the user's email address. This is the address FootSteps uses to notify users of new emails, leads, and product notifiers.
Job Title	Enter the user's current job title. This is just for reference and not customer facing
Session Timeout	This is the time of inactive use before FootSteps notifies users continue their work or to log out. The system warns users when they are within two minutes of timing out due to inactivity. **Important**: Managing session timeout is necessary for the security of your data and proper load balancing. We suggest you do not exceed 120 minutes.
Select Preferences	You can select different communication options based on the type of user you are adding. Each user can also select these under My Settings. **Email tasks and calendar each morning**: if selected, FootSteps emails the user's Daily Workplan to the email address you added above. **Send notification of customer website activity**: this is known as the "Watch" feature that only works with an ARI ePro website integrated with FootSteps. When a customer revisits the ePro website after submitting a lead, FootSteps sends an email in real time notifying the assigned user of the customer browsing your company's site and the product(s) they are viewing.

Field:	Definition:
	Send notification when email new email arrives: email sent from FootSteps that a recipient replies to, returns to the FootSteps inbox. To keep you notified of the new email, select this notification and you receive an email at the email address entered above. **Send notification when a lead is assigned:** when a customer is assigned to a user, FootSteps sends an email to the above email address. **Send notification of new leads from existing customer:** if an existing customer submits a new lead, FootSteps auto-assigns the lead to assigned user and notifies the user at the email address entered above. **Send notification of customer inventory notifier matches**: this feature only works with an ARI ePro2 website with the optional Product Notifier. When a notifier is activated for a customer and a matching unit is posted to the ePro website, FootSteps sends both the customer and assigned user an email notifying them of the matching unit. **Forward emails received by FootSteps on to employees personal email**: when this option is selected, any replies that the employee receives to their dedicated FootSteps email address will be copied and forwarded along to the personal email to which they receive the alerts above. **Caution**: If this feature is used and emails are replied to from an external email address, copies will not be saved to FootSteps as they do when emailing from FootSteps. If mobility is an issue, remember you can use FootSteps Mobile at w.FootSteps.net and use your same username and password. Emails sent from FootSteps Mobile will be saved in FootSteps.
 **Preferences**	**Delete Customers and Leads**: when this is checked, the user can delete leads and customers. Remember that FootSteps moves customers and leads to the Recycle Bin when deleted and an Enterprise Manager would have to empty the Recycle Bin to totally lose the customer. Best practice is not to delete customers and move them to an inactive, dropped, or dead status. (See Managing Sales Steps to add custom sales stages.) You may have lost this sale, but chances are with FS you will do a better job staying in touch with the customer than the selling dealer and they will look to you for their service or next purchase. This being the case, think twice about allowing deleting customers. **Export Customer**: this allows the user to export the customer data for their assigned customers.

Field:	Definition:
	Caution: Allowing exporting customer data is like sharing the combination to the company safe. This data is extremely valuable and allowing this access should be done with extreme caution! **Merge Customers**: this allows this user to merge duplicate customers. Remember that users can only merge the customers they can see, so allowing a Sales Associate to merge can only result in merging their own customers. If the two customers are assigned to separate Sales Associates an Enterprise Manager or Sales Assistant will have to perform the merge. See Merging customers for more direction on merging. **Add Customer**: this gives this user the ability to add customers manually in FootSteps. **Send Email Campaigns**: this allows this user to send email campaigns to their assigned customers. **Warning**: Email Campaigning is a fine art that requires a well thought out strategy to protect your company's email marketing reputation. Therefore, we would suggest careful consideration on granting this permission. See Launching Email Campaigns for more direction. **Mark Lead as Contacted**: FootSteps automatically marks leads as contacted when users complete follow-up tasks within Footsteps. But, if you want this user to be able to manually indicate that the lead has been contacted when they follow-up with the lead, select this checkbox. **View other Salesmen Customers**: this allows a user to see other salespeople's customer in a read-only mode. They will only be able to view the customer data and won't be able to edit or email the customer from FootSteps. If the salesperson needs full access to the customer an Enterprise Manager or Sales Assistant will have to reassign the customer. When this option is selected, the user's Quick Search will return results for customers that match, whether or not they are assigned to the salesperson. On the Advanced Search, if the user has this option checked, there will be a drop down called "Assigned To" which lets the user either select themselves, or all sales people. For multiple location users, a Sales Associate can choose to Quick Search from My Location or All Locations

Field:	Definition:
	
	Add Note to other Salesmen Customers: this allows this user to add notes to other salespeople's customer records. You must allow salespeople to view other salespeople's customers to activate this feature.

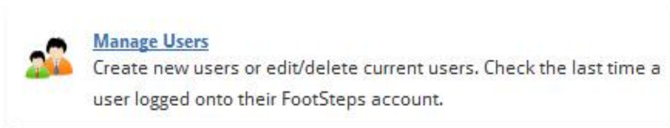
4. Review your user information and click **Save**.

Updating existing users

This section of the guide is for Enterprise Managers. Only Enterprise Managers can make changes to all users in FootSteps. Each user can make their own edits.

1. Select **Settings** on the right side of the top navigation.

2. Select **Manage Users** from the Users and Company page.



3. Select the name of the user you want to update.
4. Update the necessary user information on the Update Settings page and click **Save**.

Deactivating or reactivating users

To remove users from FootSteps, you simply "deactivate" them. If you need to add users back into the system, you can always "reactivate" them when needed.

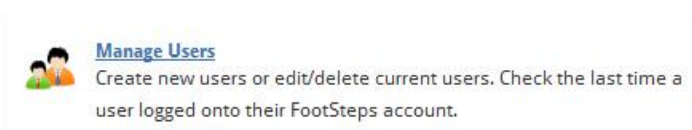
Note: FootSteps only allows you deactivate a user instead of deleting a user. Because of the electronic tagging of notes, emails, and follow-up activity, deleting a user would remove all user history from the customer activity. If the situation warrants deleting a user please contact the FootSteps Support team for help.

Follow the steps below to deactivate and reactivate users.

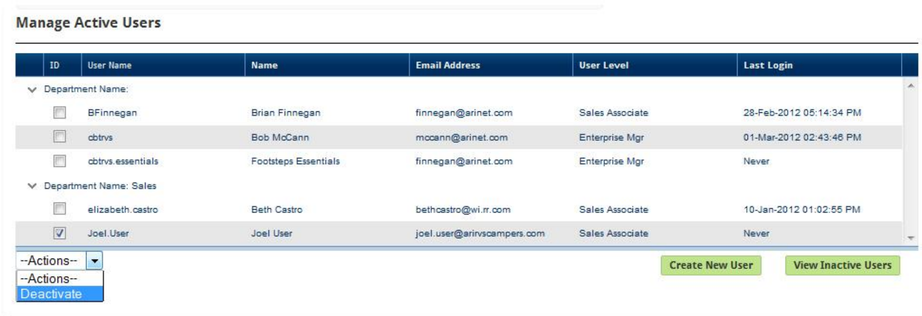
Deactivating a user

1. Click **Settings** on the right side of the top navigation.

2. Select **Manage Users** from the Users and Company page.



3. Click the box next to the user you want to deactivate on the Manage Active Users page. Select **Deactivate** from the Actions drop-down list. Deactivated users are not visible and their usernames are not available to anyone else.

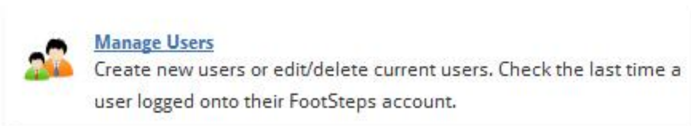


4. Confirm that you want to deactivate the user(s) and click **Yes**.

Reactivating a user

1. Click **Settings** on the right side of the top navigation.

2. Select **Manage Users** from the Users and Company page.



3. Click **View Inactive Users** on the Manage Active Users page.

4. Select the box next to the user(s) you want to reactivate.
5. On the Manage Inactive Users page, select **Reactivate** from the Actions drop-down list.

6. Confirm that you want to reactivate the user(s) and click **Yes**.

Creating email and letter templates

Enterprise Managers should organize, edit or add templates for users in FootSteps. All users can use the templates that Enterprise Managers create. In addition, all users can add email or letter templates for their own use.

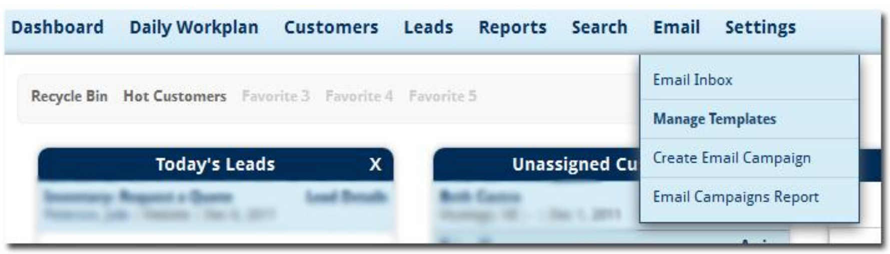
Templates do the heavy lifting in FootSteps, using templates is a sure way of always delivering a consistent message via your auto-responders, automatic emails, email campaigns, personal emails, or snail mail letters. Additionally templates shorten the response time by making it easier for your salespeople to quickly send a personal response to customers directly.

While templates add structure to the sales or service processes, the templates in FootSteps allow for personalization to ensure a unique response for each customer or prospect**.**

> **Important**: A dealer's version of FootSteps comes preloaded with industry specific templates that should be organized and personalized for your dealership. A dealer or user can add as many templates as necessary to make sure you are ready for nearly all inquiries or follow-up scenarios possible.

If you find your team repeating the same message frequently, it's time to add another template!

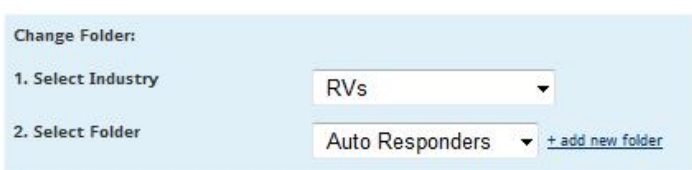
To begin working with email templates, hover over **Email** in the top navigation, and then select **Manage Templates**.



Organizing email templates

Organizing your templates in folders makes it easier and quicker for your users to find and use an appropriate template. You may create as many folders as needed.

1. Hover over **Email** in the top navigation and then select **Manage Templates**.
2. Select a template to open and click **+ add new folder** besides the Select Folder drop-down list in the template editor.



Below are a few examples of common template folders:

- Auto Responders
- 1st Email Response
- Email Follow-Up

- Print Letters
- Email Campaigns

Note: If one or more of your manufacturers are also using FootSteps. They might share templates for your use. These templates shared by your manufacturer will be organized in their own folder for easy selection.

Inserting your dealer logo

Adding your companies' logo to your templates is an effective method of extending your companies brand with every email sent from FootSteps. You wouldn't send a company letter without letterhead, and then you shouldn't send plain emails either. A best practice is to position your logo in the top left corner of the template. Being the first thing the customer sees is the obvious reason; however, the real reason is for visibility in the preview pane of the most common email clients.

Tip: For best results keep your logo image between 640 x70 pixels.

1. To insert your logo, position your curser in the top left corner of the email editor and select .
2. Upload a pre-sized JPEG, GIF or PNG file of your logo, once the image uploads, click **Insert Image** and adjust space as desired between the text and the logo. While FootSteps allows you to resize the image after inserting into the editor, it's a best practice to upload the right size logo for optimal performance.

Editing template text

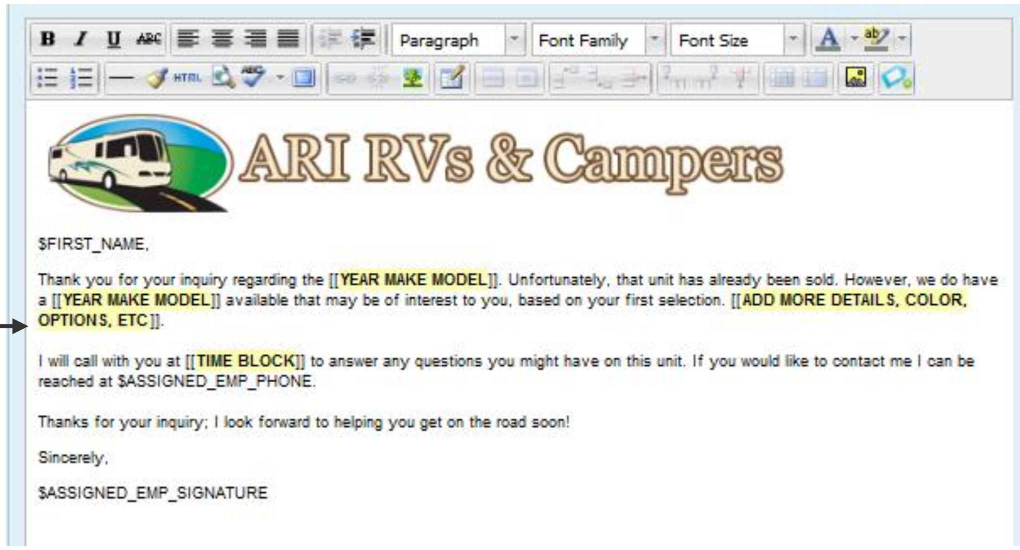
Edit the text as desired to make the templates relevant to your dealership, products, and market place. Use the standard word editing icons above the text box for bolding, justification, indenting, font, color, size, inserting images and hyperlinks, spell check and others. When the text updates are complete, click **Update**.

Note: If you are like many FootSteps users and author your templates in MS Word or another word processing program it's imperative that you copy the text from the word processing program to Notepad before pasting into FootSteps. Every word processing program contains invisible micros that are incompatible with the FootSteps text editor and will cause rendering problems with your templates. When pasting and coping your text from Notepad all the macros are striped and only plain text is being pasted into the FootSteps editor. After pasting the plain text in the FootSteps editor use the FootSteps to add your desired emphasizes to add bolding, color, font, etc.

Adding place holder prompts

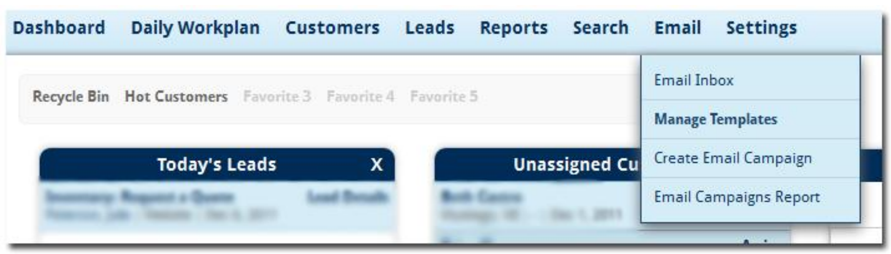
When you need the end user to add text to a selected template you can add a place holder that prompts the user to add the text, and if the text isn't added FootSteps does not allow the email to be sent. To add a place holder simply type two [[add your prompting text and finish with two]]. For example: [[UNIQUE FEATURE]]. When you add the second set of brackets the text prompt box becomes highlighted in yellow for easy visibility.

Creating yellow, highlighted prompts helps your sales team quickly add detailed information to their emails.



Adding email templates

1. To add email templates, hover over **Email** in the top navigation, and then select **Manage Templates**.



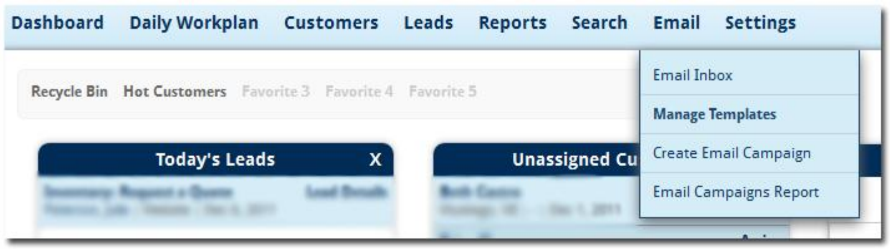
2. Click **Add New** in the upper right corner of the Active Templates page. The table below contains brief descriptions to help you complete the email.

Field:	Definition:
Title	Title your template so the users can find the email easily and quickly.
Subject	We suggest that you always include the name of your company in the beginning of the subject line. A shorter subject line is better (50 characters or less). Avoid words such as: Free, Percent off, and Reminder. These words are the most popular to trigger spam filters.
Shared Template	Select this option if you want other users to have use of the template. If you want other Sales Associates to use the templates the templates will need to be added at the Enterprise Manager or Sales Assistant logon and shared. Typically auto-responders, automatic emails, and email campaigns are not shared to prevent too much clutter for Sales Associates.
Template should mark lead as contacted	If this template will be used to mark a lead as contacted, select this box. When the user replies to a lead using this template, the lead will show as contacted when the email from a template is sent. Best practice: include a Dealer Stationary template for email

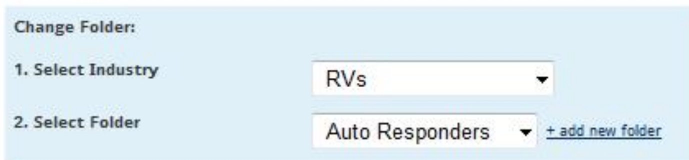
Field:	Definition:
	responses that a prepared template is not appropriate. This ensures consistent company branding and marks leads as contacted for reporting purposes.
Test Email	Add a test email address such as your work email to test the template to ensure merge codes and links are working properly.
Merge Codes	To insert personalized copy from the database automatically you can insert a merge code. Place your curser where you want the information to appear in the email or letter and select the merge code from the list of Available Merge Codes at the right side of the editor.
Show Advanced Options	Selecting this link expands the “To” fields to include CC and BCC. This feature only works when actually sending an email from the editor and not while adding a template.

Adding letter templates for printing

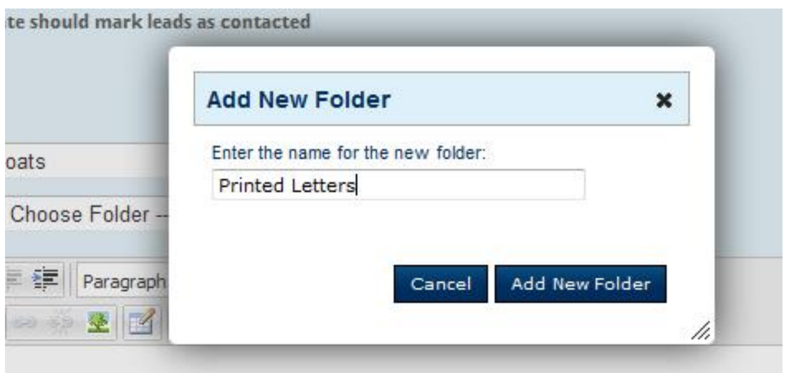
1. To add letter templates, start with the same steps for adding an email template: hover over **Email** in the top navigation, and then select **Manage Templates**.



2. Click **Add New** in the upper right corner of the Active Templates page.
3. Click **+ add new folder** to keep these letters easy to find for the users.



4. Add a title to your new folder, such as **Printed Letters.**



5. Click **Add New Folder**. Your new folder title appears as a selection in the drop-down list.

6. Follow Adding email templates instructions starting on the previous page.
7. Use Printed Letter for the subject line. There is no use for a subject line in a letter but the program requires one.
8. Add line feeds at the top of the letter to center the letter on your letterhead. Typically start with 10 linefeeds and adjust up or down by adding or deleting line feeds.
9. See Setting up follow-up routines in this guide to associate a specific letter template with follow-up processes.

Setting up automatic emails

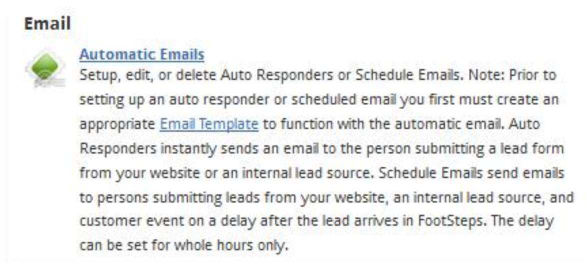
Creating auto responders

When a lead is submitted from your website, the first step in the fulfillment process should be to acknowledge the customer by replying with a relevant email auto response. FootSteps is equipped with unique auto-responders that allow a separate response for each type of lead. For instance, you might want to respond differently to customer requesting a quote than a job applicant applying for a job.

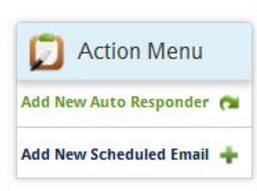
Before you can turn on automatic emails you have to first author your response. See Adding email templates to create your own auto responder templates or edit the standard industry specific auto responder templates that come with your FootSteps account. Only Enterprise Managers can manage auto responders.

1. Click **Settings** on the right side of the top navigation.

2. Click **Automatic Emails** in the Email section.



3. Click **Add New Auto Responder** from the Action Menu.



4. Select the auto responder template from the folder. Hopefully you organized your templates and you put the auto responder templates in an Auto Responder folder!
5. Select the auto responder email template.
6. Select the form(s) you want to associate the auto responder email template selected.
7. If Internal Lead form is selected, select your unique lead source. See Adding lead sources to add unique lead source. This is recommended for more granular reporting.
8. If you want to auto responders to mention a specific product select **Yes** for Add Interested In? Select Type, New Used, or Brokerage/Consignment. Add Make, Model, or Category. Note, not all the fields are mandatory. The system will match based on the criteria you entered.
9. Click **Save**.

Click to change a form, an associated email template, or a product of interest.

Click to move change for order or response, as the system will send out the first matching auto responder it finds when a lead comes in. The system will send only one auto responder per lead, based on the first match it finds.

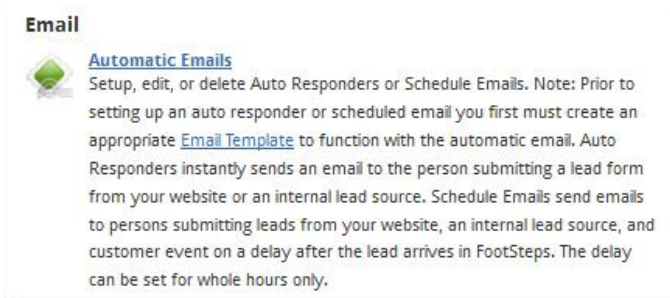
Setting up scheduled emails

To send emails automatically in the future FootSteps will do so. We need to caution on sending emails in the distance future due to having an ill-timed email sent when the time wasn't just right. FootSteps will also prompt users to send emails rather than automatically send them. See Adding Future Follow-Ups

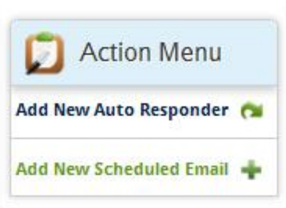
To have FootSteps send an email automatically:

1. Click **Settings** on the right side of the top navigation.

2. Click **Automatic Emails** in the Email section.



3. Click **Add New Scheduled Email** from the Action Menu.



4. Select the email template from the folder. Hopefully you organized your templates for this use in a Scheduled Emails folder!
5. Select an email template.
6. Select the form you want to associate the email template selected.
7. If Internal Lead form is selected, select your unique lead source. See Adding lead sources to add unique lead source. This is recommended for more granular reporting.
8. Select trigger from Customer Event, Lead Date (the date arrived), Date Owned (Date Delivered), or Service Date (The date the product was first used).
9. Enter Response Delay from the above dates. Add whole hours only.

10. If you want the scheduled email to reference a specific product select Yes for Add Interested In? Select Type, New Used, or Brokerage/Consignment. Add Make, Model, or Category. Again, not all fields are required, but the system sends out automatic emails for every matching rule it finds.
11. Click **Save**.

Click  to change a form, an associated email template, or a product of interest.

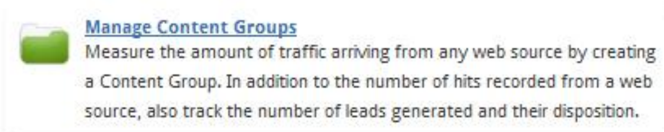
Learning about Content Groups

You could never tell by the name of this feature what it does! It simply counts how many customers click on links from websites or emails. (Please note that this function does not exist for “scheduled emails.”)

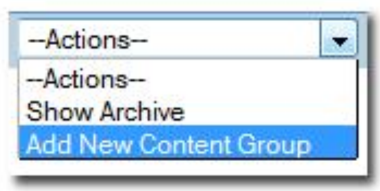
Instead of simply inserting a hyperlink in an email or a link directly from a banner ad to your website, you can use a content group link and measure the number of customer that click on the link. FootSteps counts the numbers of clicks and directs them to the appropriate webpage. In addition, if the web page is hosted by ARI, the link tracks the number of customers submitting leads from the content group link. Very powerful!

1. Click **Settings** on the right side of the top navigation.

2. Select **Manage Content Groups** in the Email section.



3. Select **Add New Content Group** from Action drop-down list at the bottom of the grid.



4. Name the group and a add description.
5. Paste in the destination URL. This is the location on the web you ultimately want the customer to land.
6. Adjust date for when campaign starts. This is helpful testing the link without the tests being counted.
7. Click **Save**.
8. Click into Tracking URL and select all Ctrl+A and copy Ctrl +C. Paste this link and insert this URL in a hyperlink to be counted. If you have someone hosting a web banner ad and they need a URL to link to, give them this one for reporting purposes.

If you want to remove a Content Group from displaying on the Content Group page, you may click on “Archive” in the Actions Column. This moves the Content Group onto the Archives tab; accessible by choosing “Show Archive” from the Action drop-down on the bottom left of the Content Group report.

Adding lead sources

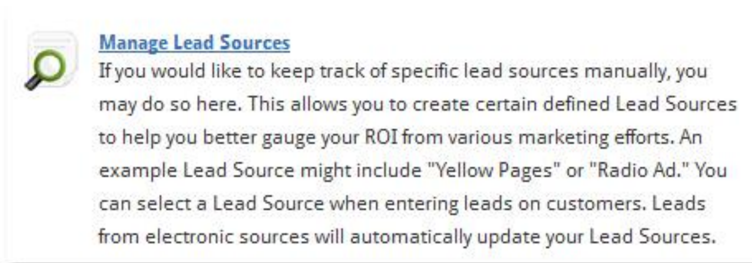
If you have leads arriving at your dealership that don't auto populate FootSteps automatically, you need to add those sources to FootSteps for easy key in and effective reporting.

Note: If you are receiving lead via email and you want these leads to auto-populate FootSteps you can use ARI's product called *Leads from Anywhere* to send leads directly to FootSteps so that you don't have to add the lead manually. Contact the FootSteps Support Team for more information.

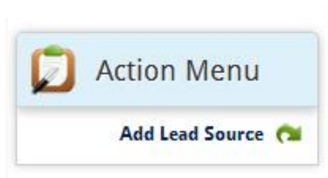
Follow the steps below to add lead sources.

1. Click **Settings** on the right side of the top navigation.

2. Scroll down to Sales Workflow Settings and select **Manage Lead Sources**.



3. Select **Add Lead Source** from the Action Menu on the Manage Customer Attributes page.



4. Add a name for the lead source.
5. Add a description (this is optional if the description is obvious).
6. Click **Save**.
7. Repeat these steps until you have added all the lead sources you need.

Adding customer sources

To track the number of opportunities from what source, you will want to add your company's unique customer sources to FootSteps. The source "Website" is defaulted so there is no need to add it again. You can add as many sources as you like to achieve your level of detail.

Examples of common customer sources are:

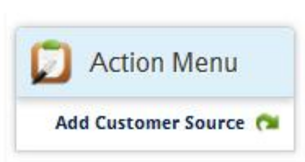
- Walk-In
- Phone
- Show (Boat, RV, Trade, Home)
- Referral
- Previous Customer

To add customer sources, follow the steps below.

1. Select **Settings** on the right side of the top navigation.

2. Click **Manage Customer Sources** from the Sales Workflow settings area.

3. Click **Add Customer Source** from the Action Menu.



4. Add a name for the customer source.
5. Add a description (this is optional if the description is obvious).
6. Click **Save**.
7. Repeat these steps until you have added all the stages to support your processes.

Adding sales stages

FootSteps has three defaulted sales stages that work as follow-up triggers: Quoted, Sold, and Delivered.

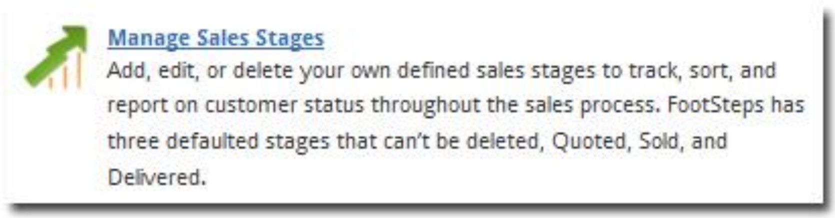
You can add as many other sales stages that you want to trigger follow-up routines, track and/or report. Examples of sales stages are:

- Pending Finance
- Dead Deal
- Inactive
- Finance Turndown
- Bought Elsewhere

To add sales stages, follow the steps below.

1. Select **Settings** on the right side of the top navigation.

2. Scroll down to Sales Workflow Settings and select **Manage Sales Stages.**



3. Select **Add Sales Stage** from the Action Menu on the Manage Sales Stages page.

4. Add a name for the sales stage.
5. Add a description (this is optional if the description is obvious).
6. Click **Save**.
7. Repeat these steps until you have added all the stages to support your processes.

Setting up sales steps

Dealerships often measure their daily sales activity. FootSteps allows you to preset the steps for YOUR sales process so the Sales Associates can simply check off the stages completed with a prospect on a fresh or b-back visit. These steps should be the milestone steps of the process such as Product Selection, Write-Up, and others.

Important: The setup process must be completed in two steps:

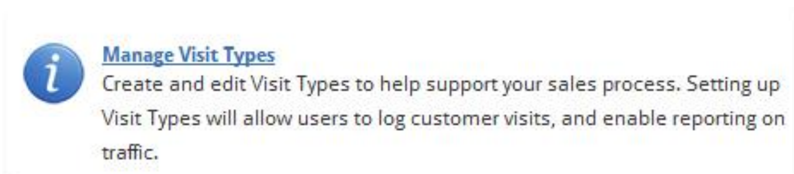
1. Manage visit types.
2. Manage sales steps.

The following sections include the steps for completing these two main steps.

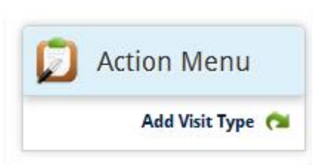
Manage visit types

1. Click **Settings** on the right side of the top navigation.

2. Scroll down to Sales Workflow Settings and select **Manage Visit Types**.



3. Select **Add Visit Type** from the Action Menu on the Manage Customer Attributes page.



4. Add a name for the visit type. Examples include:
   - New Customer or Guest
   - Fresh Up
   - B-Back
   - Phone Up
5. Add a description (this is optional if the description is obvious).
6. Click **Save.**
7. Repeat these steps until you have added all the visit types to support your processes.

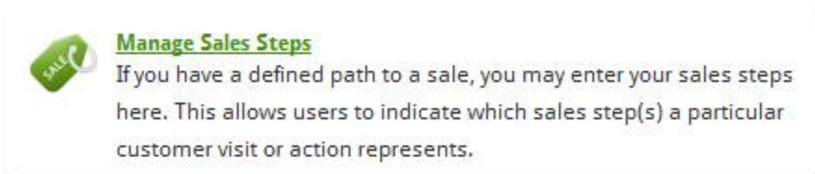
Manage sales steps

After you add your visit types using the steps from Manage visit types, now you should add the unique steps to your process(es).

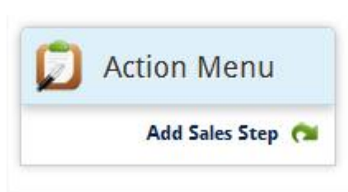
Some popular steps are: Presentation, Demo, Selection, Write-Up, TO to Manager, To to F&I.

1. Select **Settings** on the right side of the top navigation.

2. Scroll down to Sales Workflow Settings and select **Manage Sales Steps.**



3. Select **Add Sales Steps** from the Action Menu on the Manage Sales Steps page.



4. Add a name for the sales step.
5. Add a description (this is optional if the description is obvious).
6. Click **Save**.
7. Repeat these steps until you have added all the steps to support your processes.

Adding note categories on customer records

When you add a note to a customer's record you can title the note with an appropriate category to identify the type of note.

Example of note categories: Phone Call, Showroom Visit, Quote, Service Issue, etc.

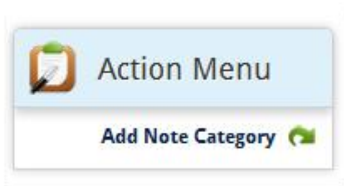
Follow the steps below to edit note categories.

1. Select **Settings** on the right side of the top navigation.

2. Scroll down to Customer Attribute Settings and select **Manage Note Categories.**

Note categories come pre-populated with several names and you can add or delete unwanted categories.

3. Select **Add Note Category** from the Action Menu on the Manage Customer Attributes page.



4. Add a category name.
5. Add a description (this is optional if the description is obvious).
6. Click **Save**.
7. Repeat these steps until you have added all the note categories to support your processes.

Tagging customer interests

Tagging customer interests is one of the most important pieces of proper Customer Relationship Management (CRM). When it comes time to reach out with offers and information via email or snail mail or any other means, it is very important that you are directing the right message to the right audience.

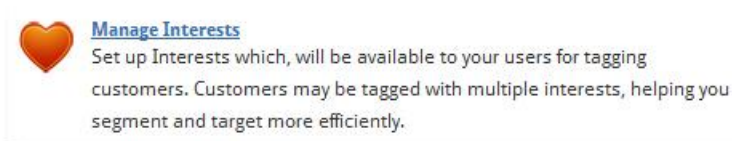
FootSteps has made it very easy to setup interest tags for the users to simply check the appropriate tag.

Interest tags vary by industry and are often defined by the lifestyle or type of use that surrounds the products you sell or service. Some examples are: Cruisers, Sailors, Residential, Commercial, Weekender, Tailgater, Off Road, Utility, etc.

Follow the steps below to add interest tags.

1. Select **Settings** on the right side of the top navigation.

2. Scroll down to Customer Attribute Settings and select **Manage Interests**.



3. Select **Add Interest** from the Action Menu on the Manage Customer Attributes page.

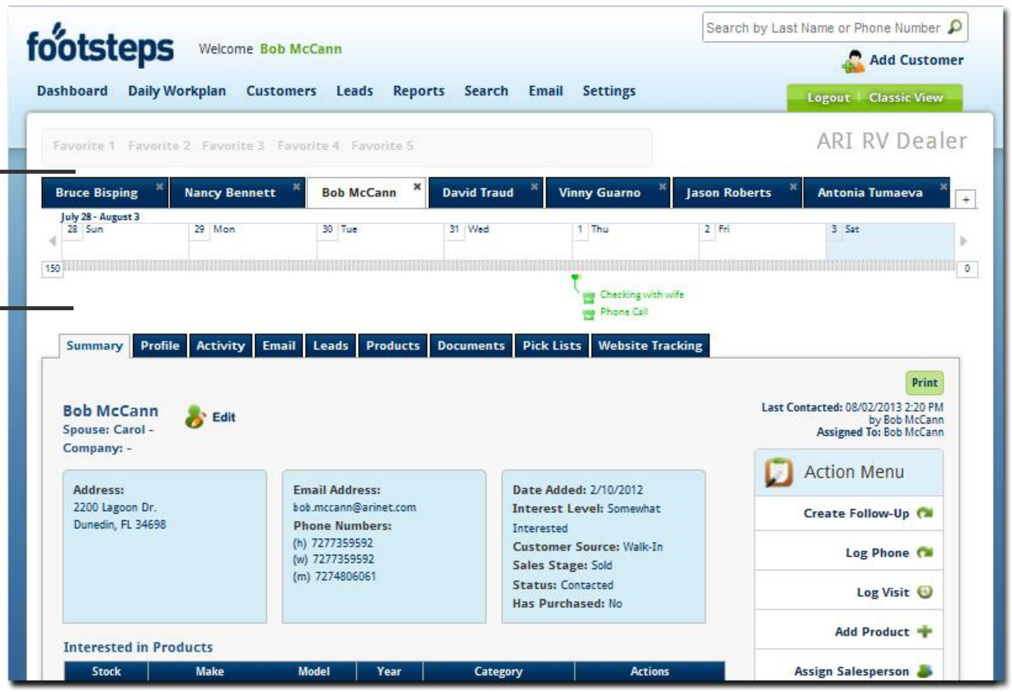
4. Add a name for the type of customer interest.
5. Add a description of the interest (this is optional if the description is obvious).
6. Click **Save**.
7. Repeat these steps until you have added all the customer interest tags to support your processes.

Setting up follow-up routines

A salesman's mantra has always been *follow-up, follow-up, follow-up*! FootSteps helps Sales Associates remember to follow-up prospects before the sale and customers after the sale.

In addition to manually adding a follow-up to the Visual Task List (VTL), FootSteps allows for predetermined follow-up routines triggered from Sales or Service Stages.

Follow up reminders/tasks appear here in the **Visual Task List** (VTL) as well as the **Daily Workplan**.



Once you determine the number of touch points for the follow-up routine before and after the sale, the first step is to set your own naming conventions. Rather than just using Phone Call, Email, Letter, or Appointment - you can use a more descriptive term such as 1-Day Prospect Call, Showroom Visit Email, or Service Intro Letter.

To add your follow-up routines, follow the steps below.

1. Select **Settings** on the right side of the top navigation.

2. Scroll down to Sales Workflow Settings and select **Manage Follow-up Types**.

3. Select **Add Follow-Up Type** from the Action Menu on the Follow-up Types page.

4. Add a title. (*For example*: Showroom Visit Email)
5. Select Parent Follow-Up Type. Options include: Appointment, Email, Fax, Letter, Phone Call. This step selects the appropriate icon for easy reference in the workplan or VTL.

Note: If you select Letter or Email, FootSteps asks you to associate a template (see above section to add or edit templates) with the follow-up routine. *This is a key step to the one-click letter printing feature or preselecting a desired email template.*

6. Select the appropriate industry.
7. Click **Save.**
8. Repeat these steps until you have added all the Follow-Up Types to support your follow-up routines.

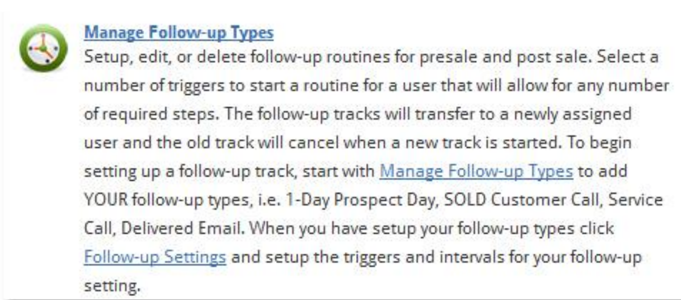
Important: Next you need to setup the follow-up routine by setting the occurrence and the trigger to populate the follow-up type in the Visual Task List (VTL) and Daily Workplan. Follow the steps in the section below.

Setting up the follow-up routine and trigger

In order for your follow-up routines to work in the Visual Task List (VTL) and Daily Workplan, you need to indicate when the follow-up routine occurs and what triggers the follow-up routine.

1. Select **Settings** on the right side of the top navigation.

2. Scroll down to Sales Workflow Settings. Select **Follow-up Settings** from the Manage Follow-up Types section.



3. Click the **+** on the Trigger you want to follow-up routine to begin.

4. Select **Follow-Up Type**. These should be familiar from the types you just entered.
5. Add Unit**:** this will be a number of days, weeks, months, or years. If you want to start the routine the same day as triggered, enter “0”
6. Click **Save.**
7. Repeat these steps until you have added all the Follow-Up Settings to support your follow-up routines.

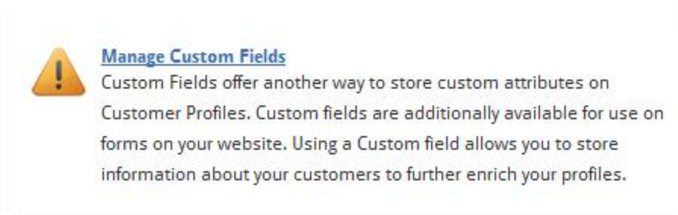
Adding custom fields

The ARI FootSteps team with the help of FootSteps users has thought of most of the fields needed to run an effective CRM program. However, keeping with the spirit of total flexibility, FootSteps allows for the addition of custom fields that are also searchable. Examples of these might additional family names, captain's name and phone number, slip number, preferred customers, club members, etc. If you can think of it, FootSteps can support it!

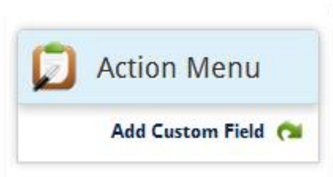
There are two types of custom fields: Radio or Text. Follow the steps below to learn how to add custom fields.

1. Select **Settings** on the right side of the top navigation.

2. Scroll down to Customer Attribute Settings and select **Manage Custom Fields**.



3. Select **Add Custom Field** from the Actions Menu on the Manage Customer Attributes page.



4. Add the title of custom field.
5. Select Type. Text: If you need to add free text to this field, select **Text**. Radio: If you need this field to include or exclude the customer, select **Radio**. Default: Yes or No
6. Click **Save.**
7. Repeat these steps until you have added all the custom fields to support your needs

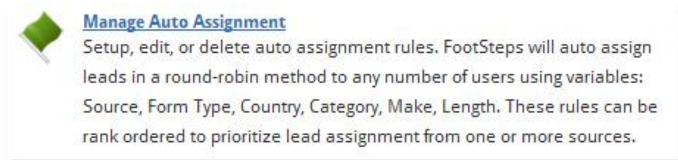
Managing auto assignments

FootSteps auto assigns leads in a round-robin method to any number of users using variables: Location, Source, Form Type, Country, Category, Make, and Length. These rules can be rank ordered to prioritize lead assignment from one or more sources.

Follow the steps below to manage auto assignments.

1. Select **Settings** on the right side of the top navigation.

2. Scroll down to Sales Workflow Settings and select **Manage Auto Assignment**.



3. Select **Add Auto Assignment Rule** from the Action Menu on the Automatic Assignments page.

4. Enter rule name that you can understand when you have to revisit the rule for editing, moving, or deleting.
5. Select employees that the leads will be round-robin to. You can select one or multiple employees by holding down the Ctrl key.
6. Select the appropriate industry.
7. Click **Next**.
8. Select the filter. Pick what FootSteps will be looking for when a new lead arrives. For example: if you want all service leads to be assigned to the service manager.
9. Select the form Type. The form types appear, in this case select the service forms. You can select as many forms as need by holding the Ctrl key down to select or deselect multiple forms.
10. Select additional filters. If you want only service forms from one location to auto-assign to an employee, select Location from the Additional Filters and select the location.
11. In for Form Type. If you select In, the filter “will include.” If you select, “Not In” then all other filters will be included except the one selected.

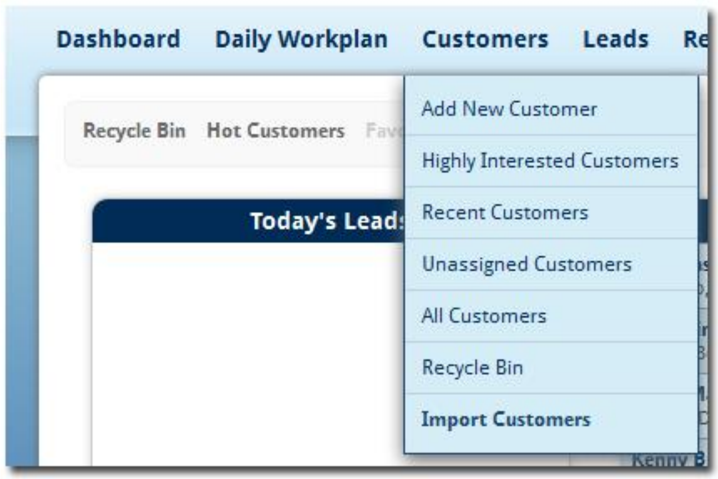
Importing customer lists

Chances are you have been storing customer data in some sort of electronic format over the years and you will want to import the data to FootSteps.

FootSteps allows more than 60 fields of import data and makes it simple to import from your DMS/BMS, Contact Management Software, Outlook, or simply an Excel spreadsheet.

Simply said, if you can export the data, FootSteps allows you to import it as often as you like! Keep in mind that FootSteps customer matching feature eliminates duplicate entries and allows you to choose which file you want to override the data, the new data being imported or the data already in FootSteps.

To import data, click **Import Customers** from the drop-down menu under **Customers** in the main top navigation.



All the instructions and helpful tips are already on the Import Customer page to help you import your customer list with ease.

Using FootSteps

After your Enterprise Manager has FootSteps setup to support your processes and nomenclatures it's time to start using the program. Like starting with any new software program, you need to jump in and start exploring what you can do with the program.

Practicing basic tasks

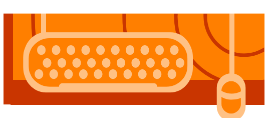
To help you jump right in to learning FootSteps, one of the first things you can do is verify that your user information is correct.

1. Select **Settings** on the right side of the top navigation.

2. Select **My Settings** under the User and Company Settings section and review your user information.

3. You see your basic user information as well as some preferences that your Enterprise Manager set for you on the My Setting page. If you need more help understanding these preferences, refer to the Add additional users section that Enterprise Managers follow in this guide to set up users.

Try it!



Now that you've verified your user information in FootSteps, go ahead and try some of the basic tasks listed in the table below. If you need help with the task, follow the step-by-step instructions in this guide. **Just click the links below to take you to the specific instructions for each task.**

Basic task:	Instructions in this guide:
1. Add yourself as a customer.	Adding customers
2. Send a test email to yourself from your customer record.	Composing an email
3. Add an email signature and resend your test email to yourself to see how merge codes work.	Creating your email signature
4. Add yourself as a new lead.	Adding leads
5. Make a note on your customer record.	Adding a note on a customer record

Basic task:	Instructions in this guide:
6. Add a follow-up activity and view it on your Daily Workplan.	Adding future follow-up
7. Arrange the "Widgets" on your Dashboard to show the information useful to you.	Navigating around the Dashboard

Now that you've completed some of the main tasks in FootSteps, we also suggest you glance over other sections of "Using FootSteps" in this guide to learn more about searching, reporting and Email Campaigns.

Defining customers vs. leads

"Customers" is simply a polite way to refer to any contact in FootSteps. Every contact in FootSteps is a customer regardless if they made a purchase or not.

Leads by definition as they pertain to FootSteps are "Customers waiting to be engaged (helped)". This is your litmus test for the FootSteps difference between a customer and a lead.

- If the customer has been assisted and you want them added to the FootSteps database, you simply add them as a customer.
- If the customer has raised their hand, typically electronically (through a website) and hasn't been assisted by someone at your dealership they should be added to the program by "Add Customer" and "Mark as Lead".

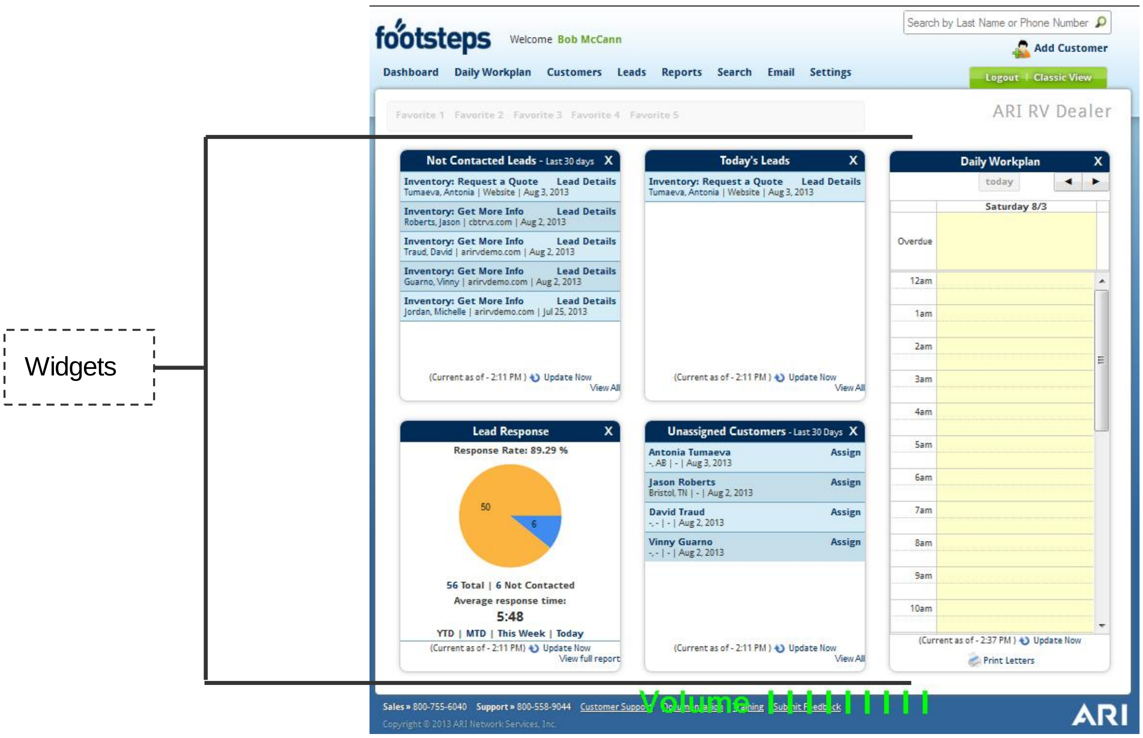
Marking as Lead triggers FootSteps to watch this customer and plug in the accountability via views such as Today's Leads, Yesterday's leads, All Leads, Unassigned Leads, Unread Leads, Not Contacted Leads, and associated reports relating to leads activity such as Lead Response Time, Lead Matrix, and Lead Scoreboard.

Navigating around the Dashboard

When you logon to FootSteps you land on the Dashboard. Enterprise Managers can setup the Dashboard to display information that is useful to you on a daily basis. The following sections highlight the main features of the Dashboard. Sales Associates and Sales Assistants cannot currently configure their dashboards.

Organizing Widgets on your Dashboard

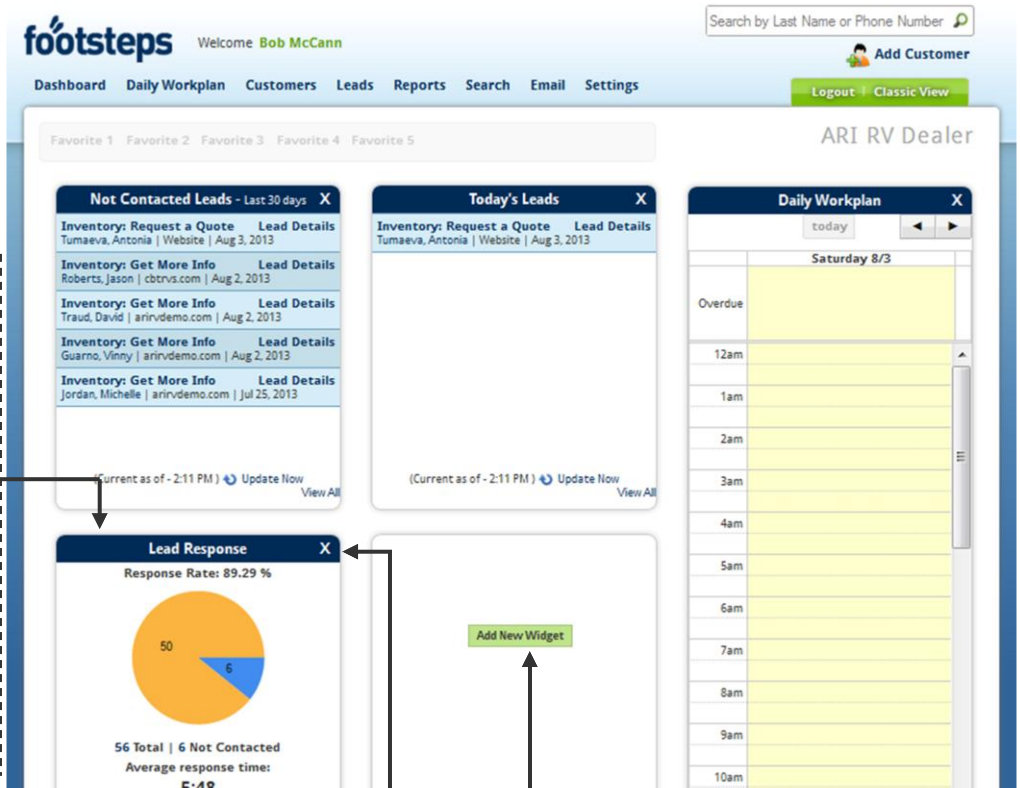
The areas of data below the main navigation are called **Widgets**. Widgets are snapshot mirrors of information located in your FootSteps account.



Each Widget updates automatically and you can manually refresh each Widget by clicking **Update Now**. Due to the limited space in the Widgets and Dashboard, if you want to see more information related to the Widget, click **View All**.

Moving, closing and opening new Widgets

It's easy to get your Dashboard to show the information that's important to you. Enterprise Managers can move, close or open new **Widgets** to have the information you want in the right place.



Moving a Widget

To move a Widget up, down left or right, **hover** over the **Widget Title Bar**.

Your cursor changes to .

Use this to **drag** the Widget were you want it. If there is a Widget in the spot you drop it, the Widgets change places.

Closing a Widget

If the Widget is not containing the information important to you, you can close the Widget by clicking **X** on the top right corner of the Widget. Confirm you want to close the Widget by clicking **Remove**.

Example: Let's say your company typically receives less than six leads in a day, so the Today's Lead Widget might not be useful to you. You can remove it from your Dashboard and find another, more useful Widget to take its place.

Opening a new Widget

A space has to be available to open a new Widget. In order to open a new Widget you may need to close a Widget to gain access to a new Widget.

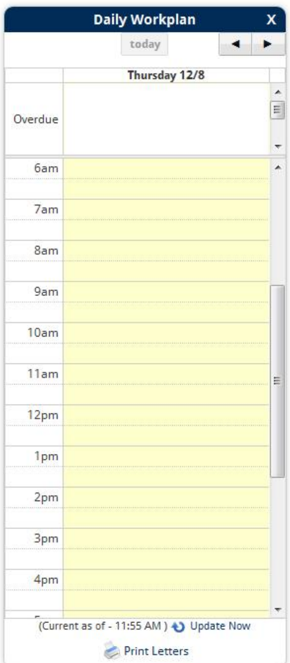
Click **Add New Widget**. Select the new Widget, and then click **Save**.

Understanding the types of Widgets

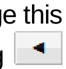
There are seven types of Widgets that Enterprise Managers can add to your Dashboard to help you manage your daily tasks: Daily Workplan, Today's Lead, Unassigned Customers, Highly Interested Customers, Not Contacted Leads, Inbox, and Lead Response Time.

Widget	Description

Daily Workplan



The Daily Workplan Widget is a mini version of the full work plan, with an abbreviated view defaulted to today's date.

- You can change this view by looking forward by day or in the past by clicking  or .
- Click **Update Now** at the bottom of this Widget to see anything newly added since last page refresh by your browser.
- Click a task or appointment and the customer profile opens for you to review. You can edit or complete the calendar item.
- You can print letters from this Widget. Refer to [Adding letter templates] and [Setting up follow-up routines] to activate this feature.

Once you have letter templates set up in FootSteps:

1. Click **Print Letters** at the bottom of this Widget.
2. Select a date range.
3. Select **Print Only My Letters** or **Print Everyone's Letters**.

> **Note**: Only Enterprise Managers or Sales Assistants can print everyone's letters.

As a best practice, load your company's letterhead in the printer, if desired.

4. Click **Print.**

Today's Leads

The Today's Lead Widget displays leads arriving after midnight for the current day.

This Widget only has room for six Today's Leads. If the Widget is full, click **View All** to see the rest of Today's Leads.

Click **Lead Details** to see the rest of the lead information.

Click **Update Now** to see anything newly submitted leads

Widget	Description
	since the last page refresh.

Unassigned Customers

The Unassigned Customers Widget displays customers that are not assigned to associates.

This Widget only has room for six Unassigned Customers. If the Widget is full click **View All** to see the rest of the Unassigned Customers.

Even though abbreviated customer data displays in this Widget, if you know enough about the customer you can assign the customer directly from the Widget.

1. Select **Location** if you have Multiple Locations.
2. Select **Salesperson** or **New Salesperson**. This list of salespeople is managed from Manage Users or Add New User under Settings
3. Click **Save**.

> **Note**: The newly assigned customer removes from the Widget after it's assigned because the Widget only displays Unassigned Customers.

If you need more information about the customer before assigning click customer's name and look at the customer summary to determine who the customer should be assigned to.

1. From Summary tab in on the customer screen click **Assign Salesperson** from the Action Menu.
2. Select **Location** if you have Multiple Locations.
3. Select **Salesperson** or **New Salesperson**. This list of salespeople is managed from Manage Users or Add new Users under Settings.
4. Click **Save**.
5. Click **Update Now** to see anything newly submitted leads since your last page refresh.

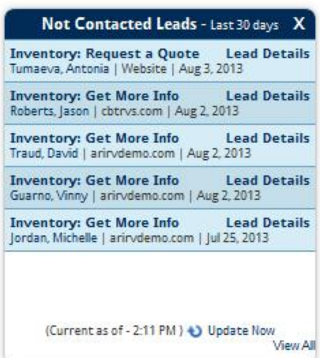
Highly Interested Customer's

The customers you mark as Highly Interested in the customer profile display in this Widget.

This Widget only has room for six Highly Interested customers. If the Widget is full, click **View All** to see the rest of the Highly Interested customers.

Click **Update Now** to see new Highly Interested customers added or deleted since the last page refresh.

Not Contacted Leads



As leads arrive from any source included manually added leads that haven't been contacted display in the Not Contacted Leads Widget.

This Widget only has room for six Non Contacted Leads. If the Widget is full, click **View All** to see the rest of the Not Contacted Leads.

If you have leads assigned duties (Enterprise Manager or Sales Assistant) you might want to click Lead Details to see all the lead details before assigning it to an associate:

1. Click **Assign Salesperson** from the Action Menu
2. Select **Location** if you have Multiple Locations.
3. Select **Salesperson** or **New Salesperson** . This list of salespeople is managed from Manage Users or Add New User.
4. Click **Save**.

> **Note**: The leads stay viable on the Not Contacted Leads Widget until the assigned salesperson replies to the customer.

If the leads is assigned to you:

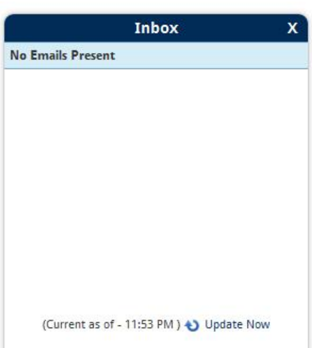
1. Click **Lead Details** to view all the information submitted
2. Click **Reply** on the Action if you need to respond. See Emailing from FootSteps.

If you reply to lead by other means click **Mark as Contacted**.

Reference your company's policy regarding marking leads as contacted. A best practice is to both email and phone a lead. A phone call is the best means of converting the customer to an appointment and ultimately selling the product. In addition, an email helps to keep your contact information with the customer that has a longer shelf life than the phone call.

Note: Fulfilling a lead in FootSteps as described above marks the lead as contacted and removes the lead from the Not Contacted Leads Widget.

Inbox

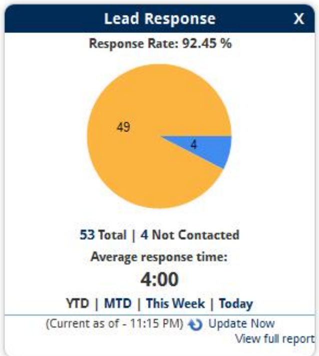


The Inbox Widget is a mirror of your full inbox – to let you know from your dashboard that you have email to tend to. The emails in the inbox Widget only contain the subject line, customer name, and date. To view email:

1. Click the subject line. This opens your full FootSteps inbox. See Emailing from Footsteps.
2. Click **Update Now** to see any newly arrived emails since the last page refresh.

Note: Once you click an email from the Inbox Widget, the email disappears from the Widget, but is still available in the FootSteps Inbox until you move it to a customer profile or delete it.

Lead Response Time



Lead Response Time Widget – lead response time is the arguably the single most important factor in managing leads.

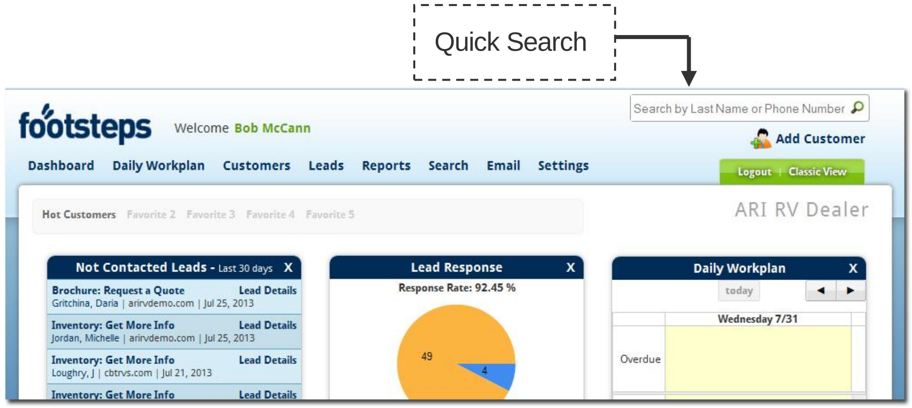
You can do everything right, but if you wait too long a prospect might be already engaged with the competitor. Therefore FootSteps allows you put your response time and response rate front and center so you don't lose focus on your response time and rates and lose sales.

1. Adjust timeframe by clicking - **YTD | MTD | This Week | Today**.
2. Click **View Details** to view the details and charts of the report.
3. Click **Update Now** to see new response times and rate since the last page refresh.

More helpful tips about the Dashboard

Using Quick Search

The Quick Search feature is a fast way to find your customers within FootSteps.

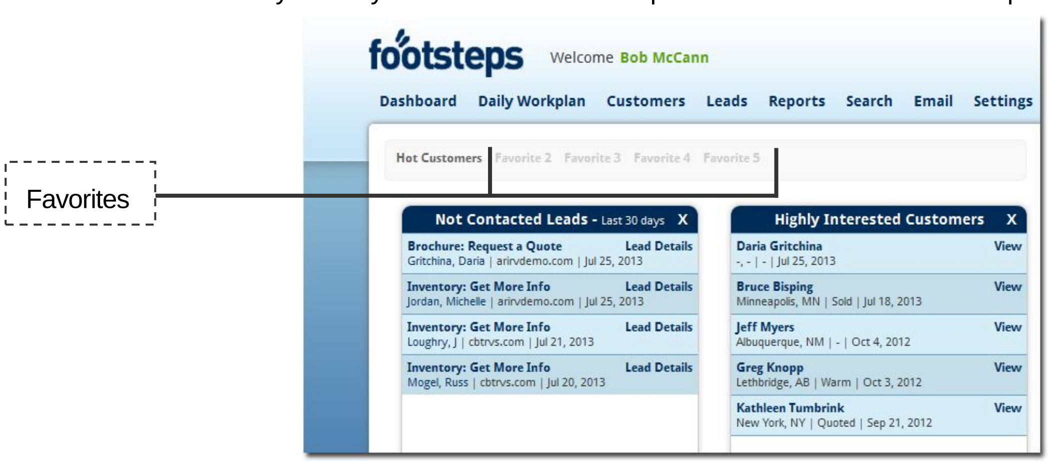


Search using the customer last name or phone number. The search is **not case sensitive** and if you not sure of the spelling, you can search with the letter(s) you think it starts with.

Example: Let's say you are searching for "Finnegan" and you're not sure how they spell it, you can search with "Finn" and all customers whose names begin with Finn will return. Enterprise Managers and Sales Assistance can search all customers in FootSteps and Sales Associates can search customers assigned to them. If Sales Associates have the ability activated to search other salesperson's customers, they can search all customers and open customers not assigned to them in a read only access.

Adding Favorites

The first time you see your favorites is on the top of the Dashboard below the top navigation.



However, the favorites are positioned to be ever present from the top of any screen in FootSteps. After using FootSteps for a while you will notice yourself working from favorite screens. You can mark five of those screens as favorites for easy one click access.

An example of a popular favorite page is for a larger company that has more than six Today's Leads and finds the Widget too small to handle the job.

You can make one of your favorites Today's leads and be only a click away from keeping an eye on them:

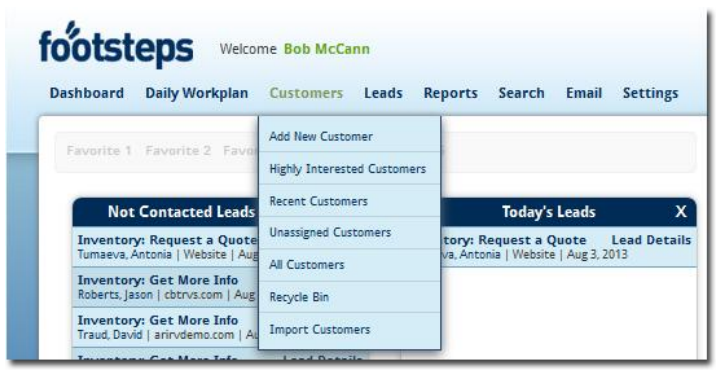
1. Hover over the **Favorite** you want to use and select .
2. Select **Today's Leads** from the list of Available Pages.
3. Edit the label and click **Save**.

To remove the Favorite: Hover below Favorite to be removed and select .

Working with customer information

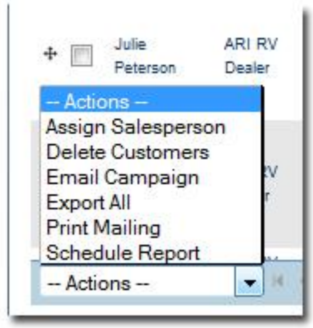
Viewing customers

When you hover over the Customers menu option in the top navigation, a drop down menu appears. Here is a quick overview of the selections in this menu.



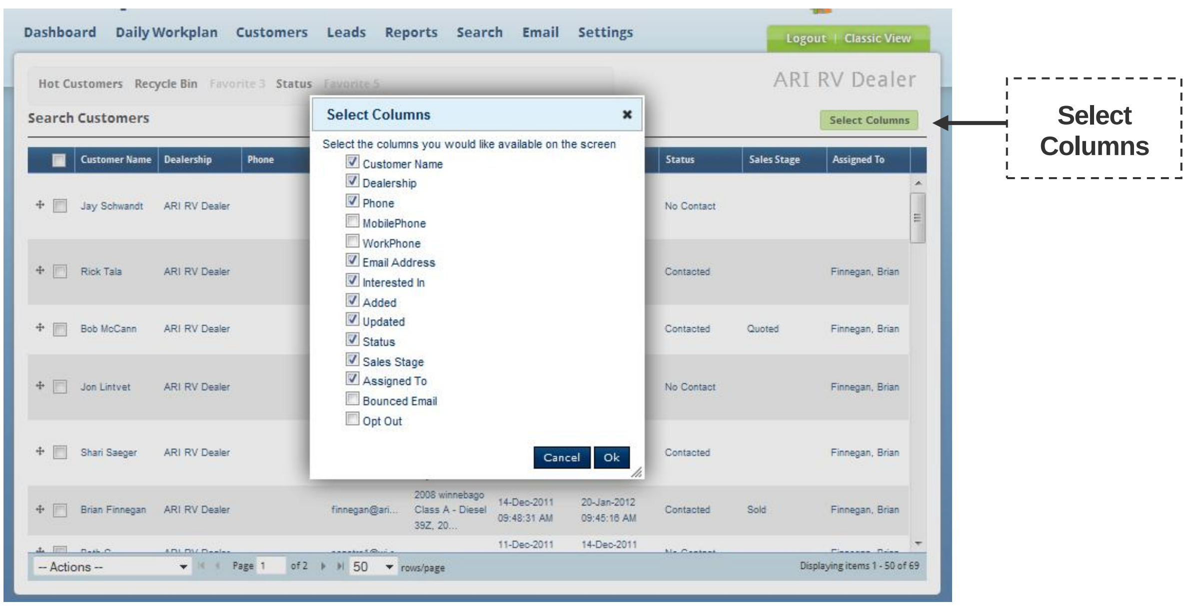
Types of customers	Description
Highly Interested Customers	These are customers that have been tagged as Highly Interested in the Customer Profile. Marked as Highly Interested, they appear on the list, when they are moved to Somewhat or Not Interested, they fall off this list.
Recent Customers	These are customers that have been accessed by you in the past 7 days.
Unassigned Customers	These are customers that are not currently assigned to a FootSteps user. See Assigning a salesperson.
All Customers	These are all the customers in your FootSteps account. Remember this is a list of unique customers that might differ from the number of All Leads. If a customer has submitted two or more leads, the customer only shows once in All Customers. With each of the lists of customers you can perform certain actions in bulk. On the other hand, if a customer walks in and is added without a lead, the customer count will be greater than the lead count.

Pick from the Actions drop-down list at the bottom of the customer list to complete the desired tasks.



You can also adjust the type of information that appears for your customers.

1. Click **Select Columns** on the right-hand side of the screen.
2. Select the columns you would like to have listed for your customers.
3. Click **OK**.



Adding customers

When you're ready to add customers to FootSteps, follow the steps below.

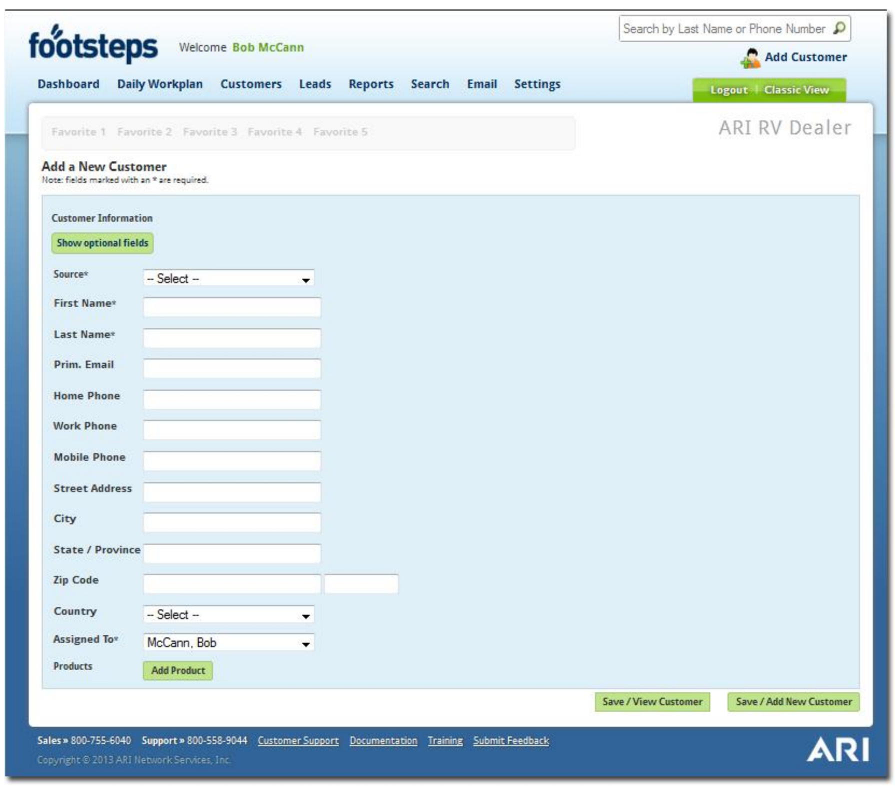
Note: User has to have permission to Add Customers. Permission can be granted by Enterprise Manager. See Managing Users

1. Click 

at the top right of any page. You can also hover over **Customers** from the top navigation and select **Add New Customer**.

2. Enter all necessary customer data on the Add New a Customer page (if a duplicate customer appears – see the next section in this guide).

FootSteps requires you to add the customer's first and last name, the source, and at least one way to contact the customer (phone, email, or address).

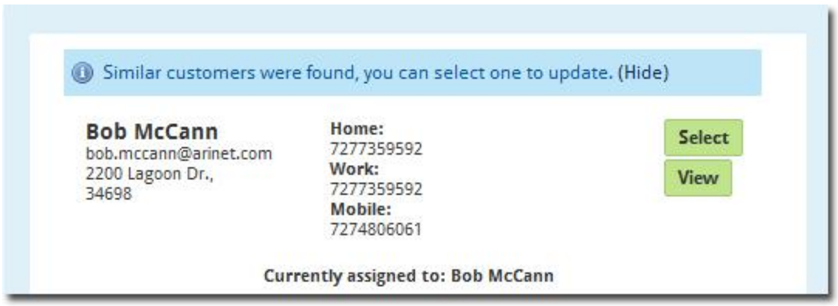


3. Click **Add Products** to add product of interest or what the customer currently owns.

4. Select **Save/View Customer** to add follow-ups or additional notes or Select **Save/Add New Customer** to enter a new customer without adding more information or follow-ups to last customer. Save/Add New Customer is for quicker data entry from a large list of customers.

Adding customers when a duplicate customer is found

While entering customer data if FootSteps finds a customer with the same or similar data, the possible customers appear to the right side of the data entry fields.



1. If you decide that one of the customers on the list is the same customer that you are entering. Click **Select**.

Note: Only Enterprise Mangers or Sales Assistants are able to select customers NOT assigned to them.

The customer data auto-populates and you can add the rest of the data at hand such as new lead source, product, or contact data.

2. Select **Save/View Customer** to add follow-ups or additional notes or Select **Save/Add New Customer** to enter a new customer without adding more information or follow-ups to last customer.

Merging customers

At times there will be a need for customers to be merged in the FootSteps for whatever reason. Merging customers has been made easy using FootSteps with a simple drag and drop method. All data and activity in both records will be saved in one record. The only step that you have to ask yourself and remember is: "What record will win?"

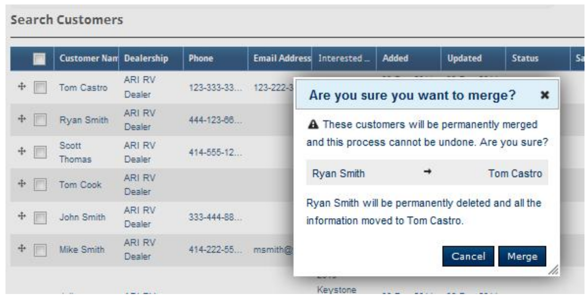
When you merge two records and there is only one field for data, when you merge one file will override the other. For instance, if records have two different first names and there only one first name field, one of the names will be dropped after the merge.

Example: When you drag and drop, remember the record you drop on will be the winner. So, if you have two customers with the same last name and one is Robert and the other is Bob, and you want to continue with Bob, you will need to drag the Robert record and drop onto Bob and Bob will be the winner!

There are numerous ways of getting a list of customers; however, most of the time the customer has the same last name, so simply do a Quick Search the customer's last name and a list of customers with the last name will return.

Here are the steps for merging customers:

1. Click and hold the  to the left of one of the customers you want to merge and **drag** to the other customer you want to merge and **drop**.



2. Confirm that you want to merge these two customers and understand that the ***process cannot be undone*** and click **Merge**.

Deleting customers

Enterprise Managers and users with permission can delete customers.

1. From Summary tab on the customer screen, click **Delete Customer** from the Action Menu.
2. Select **OK** to confirm that you want to delete. When a customer is deleted the customer goes to the Recycle Bin. Access Recycle Bin under Customers in the top navigation.

Deleted customers remain in the Recycle Bin until they are purged out of FootSteps. See Purging customers for more information.

What you need to know about the Recycle Bin

Customers deleted from the users with permission to do so are stored in the Recycle Bin and will remain there unless purged or restored by an authorized user or if the customer submits a new lead.

Yes, FootSteps reincarnates customers that have been deleted if they should resurface and show interest in your company or products. This gives you all the information FootSteps can offer to help you work with the customer or prospect effectively. If you needed, you can purge a customer from the Recycle Bin. However, without any constraints on storage space it's best to leave them in the Recycle Bin unless they are test customers or spam.

To access the Recycle Bin, click **Recycle Bin** under Customers in the top navigation.

Restoring customers

You can return deleted customers to active status in your FootSteps account. Deleting a customer is different than purging a customer. Deleting a customer simply places the customer's record in the Recycle Bin. Purging a customer removes the customer's record permanently from FootSteps.

To restore deleted customers, follow the steps below.

1. Hover over **Customers** and select **Recycle Bin**.
2. Select customer(s) that you want restored from the Recycle Bin by clicking the box to the left of the customer name. You can also click the box above in the title bar to select all on that page.

3. Select **Restore Selected** from Actions drop-down list at the bottom of the list.

4. Confirm the number selected for restore by clicking **Restore**.

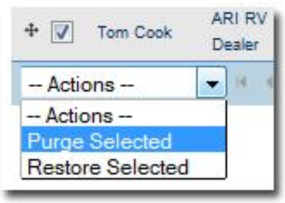
Purging customers

When you purge customers, they are gone forever from FootSteps. Deleting a customer is different than purging a customer. Deleting a customer simply places the customer's record in the Recycle Bin. Purging a customer removes the customer's record permanently from FootSteps.

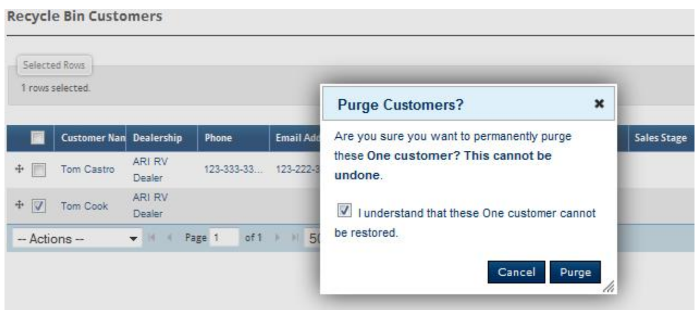
To purge, follow the steps below.

1. Select customer(s) that you want restored by clicking the box to the left of the customer name. Click the box above in the title bar to Select All on that page.

2. Select **Purge Selected** from Action drop-down list at the bottom of the list.



3. Confirm the number selected for purging and check "**I understand that these customers cannot be restored**" and click **Purge**.

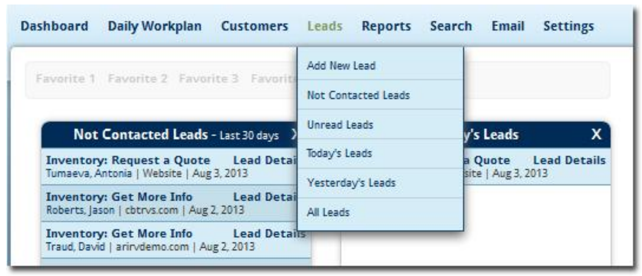


Your purged customer no longer appears in the Recycle Bin.

Working with sales lead information

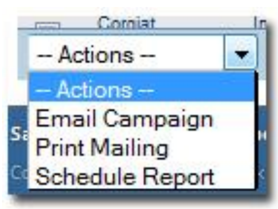
Understanding the types of leads

The Leads menu option in the top navigation contains categories to help you identify and track different types of lead information. Below is a quick overview of the selections in the menu.



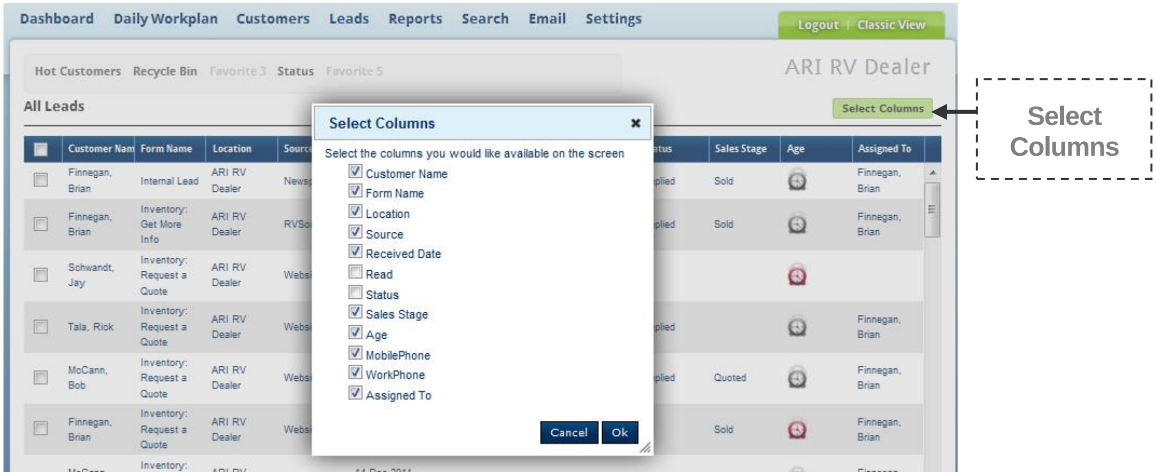
Types of leads	Description
Not Contacted Leads	These are leads submitted to your FootSteps account that are showing that they haven't been contacted. See Not Contacted Widget for more information. For this view to be effective, leads need to be diligently managed and marked as contacted to keep this list to a minimum and an accurate reflection of Not Contacted Leads.
Unread Leads	These are leads that have NOT been read by you or the assigned salespeople after they have been assigned.
Today's Leads	This view displays leads arriving after midnight for the current day.
Yesterday's Leads	This view displays leads arriving the prior day up until midnight. This view is a nice quick check in the morning that all leads were tended to yesterday and also check to see if leads came in the evening after the store closed.
All Leads	This will return every active lead (not in Recycle Bin) every submitted. Remember this is NOT a de-duplicated list of customers. If a customer submitted more than one lead, all the leads will be returned in this view.

Pick from Actions drop-down list at the bottom of the list of leads to complete the desired tasks.



You can also adjust the type of information that appears for your leads.

1. Click **Select Columns** on the right-hand side of the screen. The Select Columns pop-up box appears.
2. Select the columns you would like to have listed for your leads.
3. Click **OK**.



Adding leads

Follow the steps below to add leads that *do not auto-populate* in FootSteps.

1. Click **Add New Lead** from the Leads section on the top navigation.

2. Select **Show optional fields** on the top area of the data form.

3. Enter the lead data you collected such as name and contact information.
4. Click **Yes** in the Mark as Lead? field. The area on the forms expands for you to add more detail.
5. Select the appropriate industry.
6. Select the lead source.

7. Select the internal lead form.
8. Click **Add Products** to indicate what type of products the lead is interested in.
9. Select **Save/View Customer** to add follow-ups or additional notes or **Select Save/Add New Customer** to enter a new customer without adding more information or follow-ups to last customer.

Marking multiple leads as "Contacted"

A quick way to mark multiple leads that you have contacted to via emails, phone calls, letters, etc. is to use the Mark Lead as Contacted feature from the Action menu any of main lead information pages.

1. Select **Not Contacted Leads**, **Unread Leads**, **Today's Lead**, or **Yesterday's Leads** from Leads on the top navigation.

2. Select the checkbox next to the leads you want to mark as contacted and then select **Mark as Contacted** from the Action drop-down list.

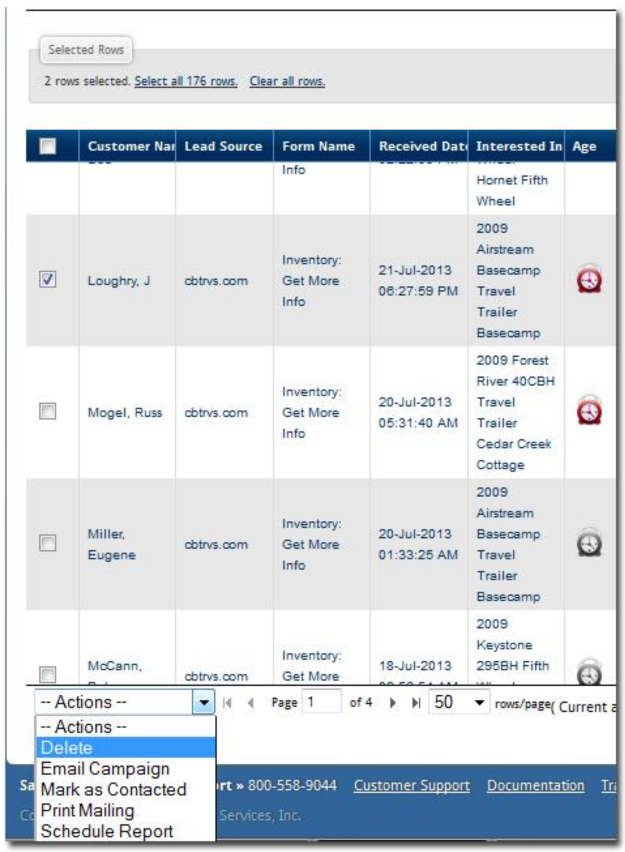
3. Confirm the number of leads and then click **Mark** The message: "Successfully Marked Leads as Contacted" appears towards the bottom of the screen when the process completes.

Deleting multiple leads

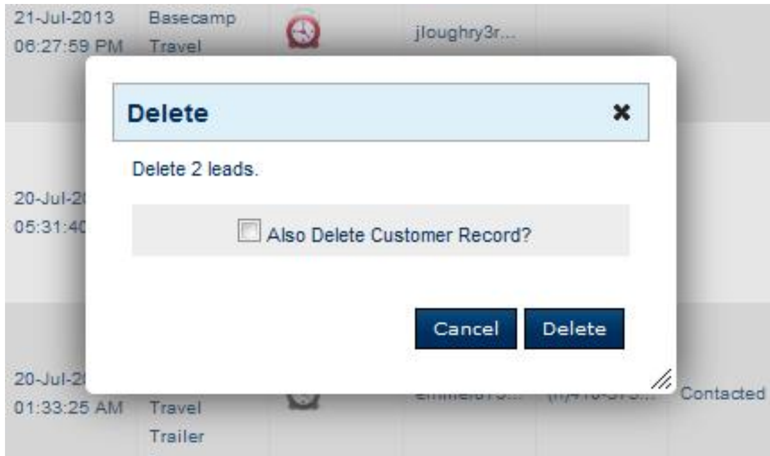
If it's time to remove some leads from FootSteps, follow the steps below to quickly remove multiple leads. You can also delete customers at the same time. After you select the leads you want to delete, FootSteps asks you if you also want to delete the customer record.

1. Select **Not Contacted Leads**, **Unread Leads**, **Today's Lead**, or **Yesterday's Leads** from Leads on the top navigation.

2. Select the checkbox next to the leads you want to delete and then select **Delete** from the Action drop-down list.



3. Confirm the number of leads you are deleting. If you want to also delete the associated customer records, select the checkbox. The Deleting customers section in this guide has more detail about removing customers from FootSteps.



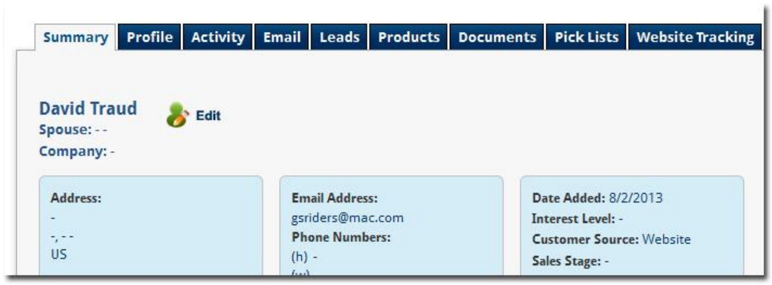
4. Click **Delete**. The message: "Successfully Deleted the Leads" appears towards the bottom of the screen when the process completes.

Editing or adding common workflows in customer records

FootSteps makes editing and adding data easy by separating the most common fields from all the fields.

Edit or adding customer data from Summary Screen allows you to quickly edit common fields such as address, phone, email address, sales stage, source, and status.

1. While viewing a customer from the Summary tab, select **Edit**.



2. Update the necessary information and then click  to save.

You can also edit or add customer data from Profile tab.

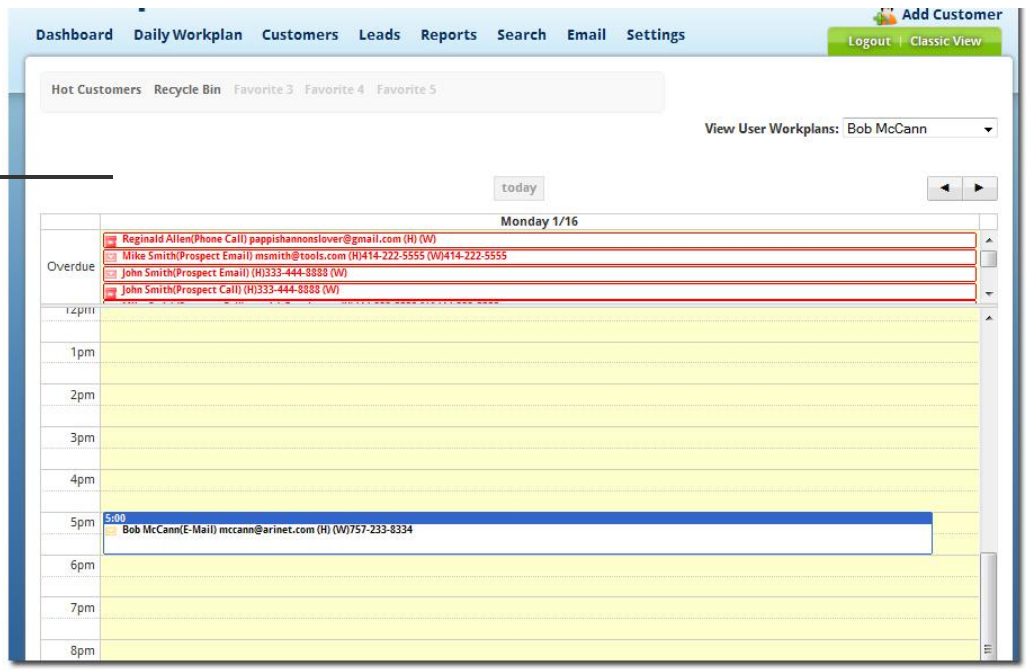
1. While viewing a customer from the Profile tab, click **Edit**.
2. Update the necessary information and then click **Save**.

Managing your Daily Workplan

Using your working plan in FootSteps should be an automatic process assuming you ask yourself each time you are working with a customer or prospect, “When should I contact this person next?” and simply add a follow-up from the customer’s record (refer to Adding future follow-up for instructions).

After a short while when you log on to FootSteps, you will have plan for your day already in place with the best contacts at the best time for a productive day. In addition, the dealership can suggest follow-up schedules that are triggered from sales stages. For instance, if your company wants everyone that visits the store to receive an email today, a phone call tomorrow, and letter the next day FootSteps will automatically add that to your Daily Workplan. See Setting up follow-up routines to setup the follow-up triggered by statuses.

All of your assigned follow-up tasks appear in your Daily Workplan.



Adding future follow-up

Out of site - out of mind is a wise man’s saying that needs not to be said using FootSteps! FootSteps makes it so easy to add a future follow-up to any customer profile. A best practice while using FootSteps is to always ask yourself before closing a customer profile, “When is the next time I want to follow-up with this customer?” It doesn’t matter if it’s today, tomorrow, next week, month or year.

In addition to selling and servicing more customers, you will be given credit for the contacts in the FootSteps Follow-Up Activity report.

After you add a follow-up, you can see it on the Visual Task List (show below) and also in your Daily Workplan.

The Visual Task List (VTL)indicates your follow-up tasks on a calendar so you can see current, past, or future follow-up. It serves as convenient tool for keeping track of what you need to do when working with leads and customers.

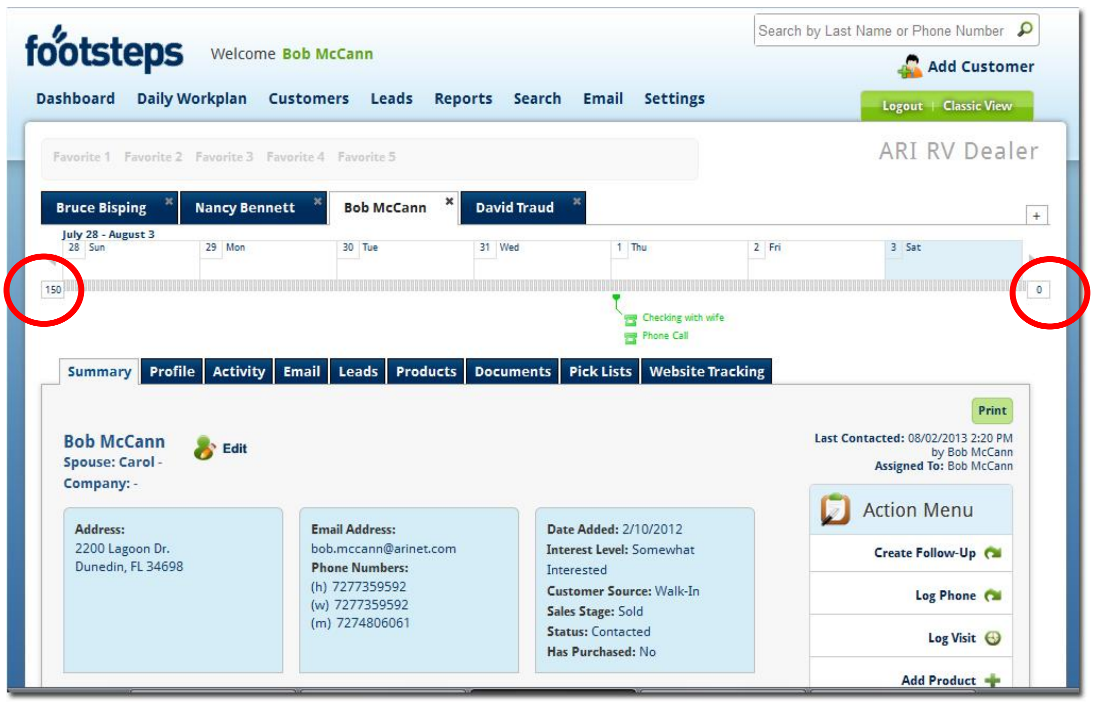
Example: Let's say it's Monday, and your VTL has a reminder for you to email the customer with sales prices. Simply click on the task and the email editor opens for you to compose your email. If the VTL has a reminder for you to send a letter to the customer, you click the reminder and if there is a template associated to the specific letter, the letter opens for you to edit and print.

Visual Task List (VTL)

Quickly see current, past, or future follow-up activity.

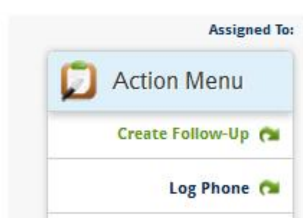
FootSteps shows the number of scheduled follow-up in the past and the future with a "number" at the left (past) and right (future) of the VTL.

Clicking the number (circled in red just for example) brings you back or forward to the next follow up.



To add future follow-up:

1. Select customer name to access the Summary customer tab. Click **Create Follow-up** from the Action Menu.



2. Select a category: Appointment, Phone Call, Email, Letter, Fax (Fax? Really? Does anyone own a fax machine anymore?) Categories can be edited or added to by an Enterprise Manger by selecting **Manage Follow-Up Types** under **Settings**.
3. Select the date. Use the handy calendar to select future date for follow-up. If you want to log a follow-up days prior you can do so by selecting a date from the past. FootSteps time-stamps it for the date entered as well. If the contact is time sensitive

such as an appointment or a scheduled phone call expand the time field and add the time.

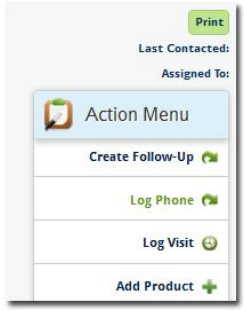
4. Unless you have a memory like an elephant you might want to note “the why” you are making contact and these notes will be ever present when making the contact. Click in the Follow-Up Details text box and add your notes.
5. If you are an Enterprise Manager or Sales Assistant where you support other Sales Associates, you can assign the follow-up to a salesperson rather than to yourself. The current logged on user will be the default salesperson the follow-up will be assigned to. If you want to assign it to the assigned salesperson or another salesperson. Select the Salesperson from the drop-down list.
6. Click **Save** to schedule the contact and add it to the Visual Task List (VTL) and Daily Workplan.

If you want or need to edit a follow-up, select the follow-up item from the Visual Task List (VTL) or Workplan and edit the date/time, add or edit notes and **Save**. The follow-up reschedules and the new notes are saved.

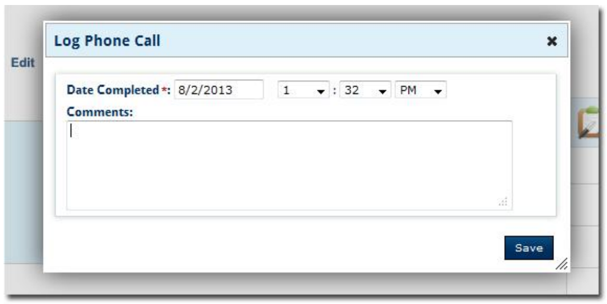
Logging phone calls

If you want to make a note of inbound or outbound calls that aren't scheduled (and get credit for the activity in the reports) use this feature:

1. Select a customer name to access the Summary customer tab, click **Log Phone** from the Action Menu.



2. Add your notes in the Comments field**.** The current Date & time already appears.



3. Click **Save.**

The phone call appears on the Visual Task List (VTL) and the Workplan to show the follow-up and also appears on the Follow-Up Activity Report.

Logging visits

A popular manager's and salesperson's means to increase sales is to measure the showroom activity and note what steps are being completed and what steps are being bypassed. The reports from these activities help managers and salespeople continue what they do well and help them focus on the weaker parts of their sales process. Dealers approach facilitating this in two ways: 1. Salespeople log their visits or 2. Sales Managers log the visits when the salespeople check with the desk manager during each customer visit. This ensures a more accurate report and every opportunity is added to FootSteps.

Follow the steps below to log a visit:

1. Select a customer name to access the Summary customer tab, click **Log Visit** from the Action Menu.

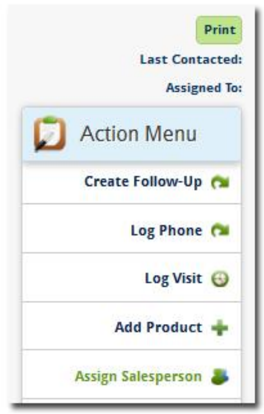
2. Select the type of visit which is typically New Visit or B-Back. For more about adding or editing visit types, see Manage visit types.
3. Select completed sales steps. These steps can be added or edited at **Manage Sales Steps** under **Settings**.

The report that rolls up these visits to a location and salesperson level can be found under the **Reports** drop-down called **Summary.**

Assigning a salesperson

If salespeople are entering their own customers, FootSteps auto-assigns the customer to the salesperson entering the customer. If they need to assign or reassign a customer to a salesperson it takes just a couple of clicks:

1. Select a customer name to access the Summary customer tab, click **Assign Salesperson** from the Action Menu.



2. Select **Location** if you have multiple locations.
3. Select **Salesperson or New Salesperson**. This list of salespeople is managed from Manage Users or Add New User.
4. Click **Save**.

> **Note**: Currently in FootSteps only customers are assigned to a user, not leads. When a customer is assigned to a user all current and subsequent leads for that customer will be assigned to the same user.

Assigning a customer from a Widget on the Dashboard

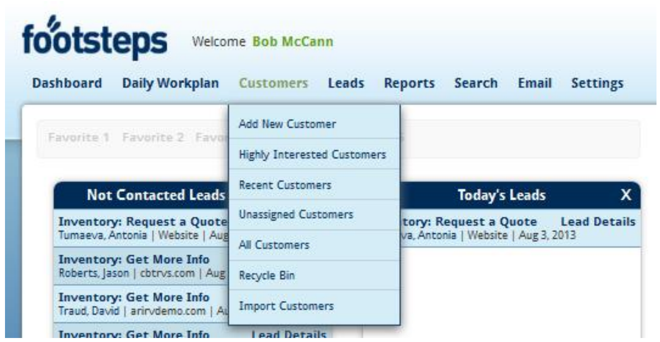
Customers can be assigned quickly right from the Unassigned Customer Widget.

1. Click **Assign** beside the customer's name.
2. Select **Location** if you have Multiple Locations.
3. Select **Salesperson** or **New Salesperson**. This list of salespeople is managed from Manage Users or Add New User.
4. Click **Save.** The customer disappears from the Unassigned Customer Widget when the page is refreshed or the Widget is updated.

> **Note**: If the Unassigned Widget is not visible on the Dashboard an Enterprise Manager only can open it by clicking **Add New Widget** if you have space available or close a seldom used Widget by clicking the **X** in the top right corner of the Widget then **Add New Widget**. Select **Unassigned Widget** and click **Save.**

Assigning and unassigning a list of customers

1. Select a list of customers from the filters under the **Customers** on the top navigation such as: Unassigned Customers, Recent Customers, All Customers, etc or a list of search results.

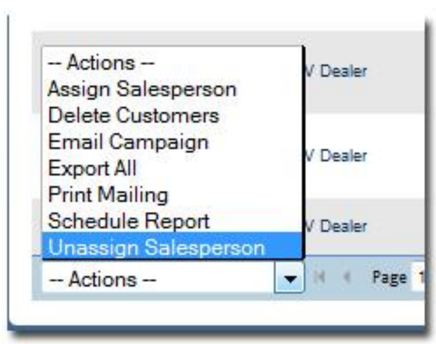


2. Select the box beside the customer's names you want to assign individually or select the box on top of the grid to select all the customers on the page.
3. Select **Assign Customers** from the Action drop-down list at the bottom of the list of customers.
4. Select **Location** if you have multiple locations.
5. Select **Salesperson** or **New Salesperson**. Enterprise Managers maintain the list of salespeople.
6. Click **Save**.

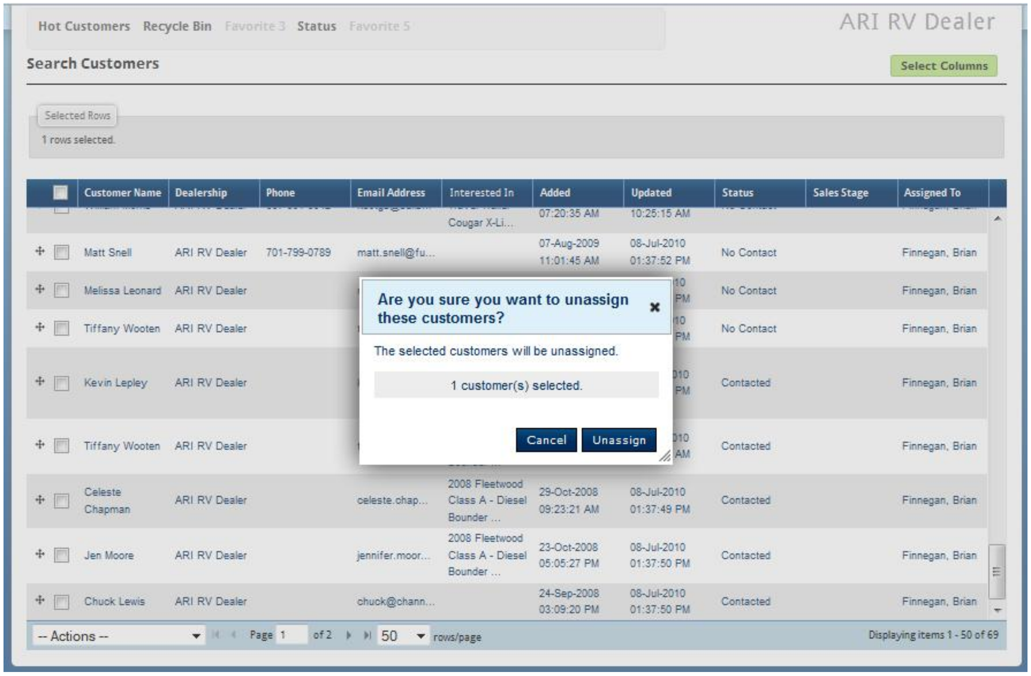
Important: Before assigning a large amount of customers to a salesperson turn off the notification for New Customers being assigned to a salesperson. Otherwise the salesperson will receive as many emails as customer assigned. These settings can be found at Manage Users. Click **User Name** and deselect "Send notification when lead is assigned."

To unassign a salesperson from a list of customers:

1. Select the customers from the filters under the **Customers** on the top navigation such as: Unassigned Customers, Recent Customers, All Customers, etc or a list of search results.
2. Select the checkboxes in the left column of the customers that the salesperson is assigned to and then click **Unassign Salesperson** from the Actions drop-down list.



3. Confirm that you want to unassign this person, and click **Unassign**.



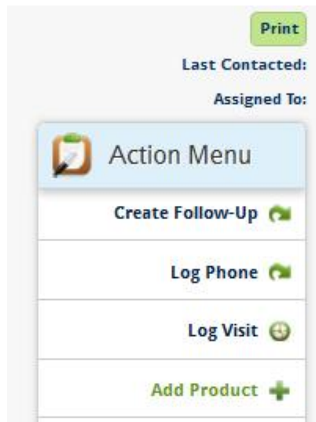
The Assigned To field is now blank for these customers and do not have a salesperson assigned.

Adding products based on customer interests

Having a record of what products the customers in your database are interested in, currently owned, or previously owned is a key component of Customer Relationship Management (CRM). All products are searchable so in addition to being able to make reference to them during a contact point a list of customer interested or who own the products can be easily generated.

There are three options when adding product the customer is interested in.

From Summary tab on the customer screen, click **Add Product** from the Action Menu.



The table below explains three options for product interest:

Interest types	Description
General Interest – I.e. Interested in only a category or make or year or price, etc.	1. Select: Interested In, Currently Owned, or Previously Owned 2. Fill appropriate fields as required – the more fields filled will return better results for searching 3. Click **Save Product**.
Specific Interest in New Make and Model NOT in stock - Optimal method for accuracy and speed	1. Select the appropriate industry from the drop-down list. 2. Select **Search Brochure**. 3. Choose the year. 4. Choose the make. 5. Choose the product line. 6. Click **Search Brochure**. 7. Select Unit by clicking Display name or thumbnail. 8. Fields populate accordingly – fill additional fields if required. 9. Click **Save Product**.
Specific Interest in New Make and Model IN stock - Optimal method for accuracy and	1. Enter Stock# or beginning of the stock number. 2. Select Unit by clicking Display name or

Interest types	Description
speed	thumbnail. 3. Fields populate accordingly – fill additional fields if required. 4. Click **Save Product**.

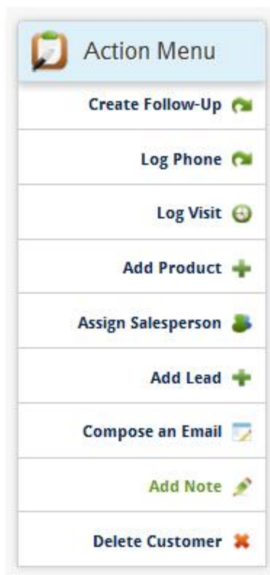
Editing products

When the need arises to edit, change, or delete products access the products Interested In from the customer Summary screen or Products screen. Products Currently Owned and Previously Owned are only accessed from the Products screen.

1. Select **Delete** alongside of product description and confirm by selecting **Yes**.
2. Select **Edit** alongside of product description.
3. Change from "Interested In" to "Currently Owned" and then update or add data in appropriate fields
4. Click **Save Product**.

Adding a note on a customer record

1. From Summary tab in on the customer screen click **Add Note** from the Action Menu.

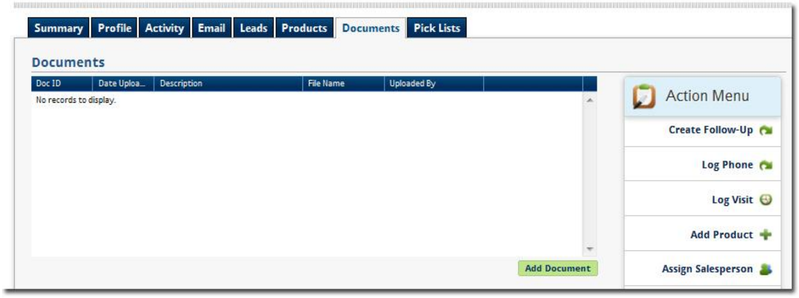


2. Select a category of the note.
3. Add or paste any necessary details.
4. Click **Save**. Notes appear in Summary (Last five activities) or Activity tab.

Uploading documents

Storing documents with each customer profile in is FootSteps first steps on "going Green." A couple of examples of companies use is to store pictures of customers and with their new toys or scanned documents related to the sale. These documents can be view anywhere you have FootSteps Pro access and the associated program to open them.

1. From the customer summary page, click the **Documents** tab.



2. Click **Add Document**.
3. Browse your PC to find the document you want uploaded.
4. Add your description of the document.
5. Click **Add**.

Emailing from FootSteps

Emailing from FootSteps is easiest and most effective if the email templates are used. If a situation arises where you don't have an appropriate template for the email response you should use the Dealer Stationary email template to maintain consistent branding.

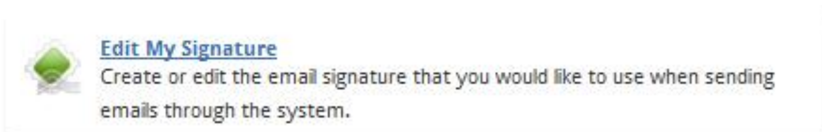
Creating your email signature

Email and letter templates use the merge code, "ASSIGN_EMP_SIGN". If you don't add a signature, your emails will be sent without a signature which helps identify you and provides your additional contact information. Creating your email signature is one of the first tasks you'll want to complete when you first start using FootSteps.

To create an email signature, follow the steps below.

1. Select **Settings** on the right side of the top navigation.

2. Select **Edit My Signature**.



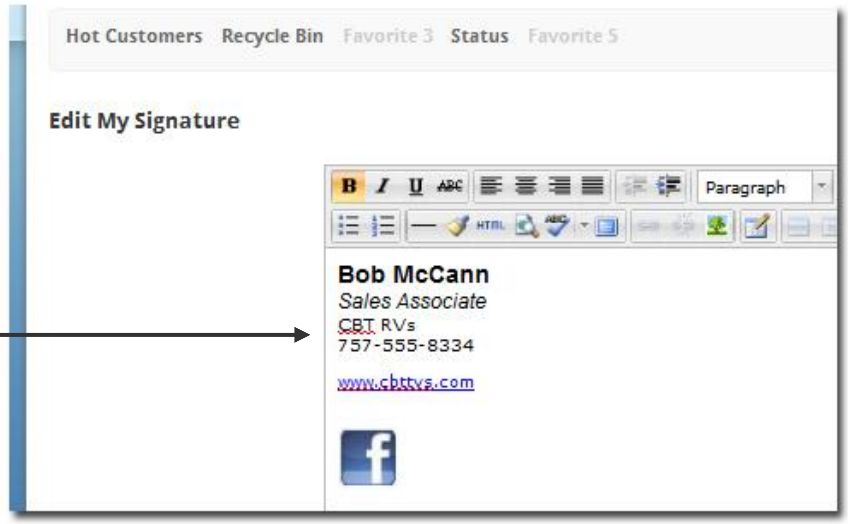
3. On the Edit My Signature page, you see a full email editor that allows you to format your text. Below is a sample of an email signature.

Use **bold** to have your name standout).

Limit the use of bold and Italic to make the signature easy to read.

Be sure to include the company's name – images are often blocked and your logo might not appear.

Include extensions if your company has an automated telephone system.



A best practice is to add the company's logo in the top left corner of the email so avoid adding the company's logo to your signature. Good images to include in signatures are a picture of the salesperson, representative brands, industry affiliations, or awards. It's a good idea to standardize the signatures for proper and consistent company representation.

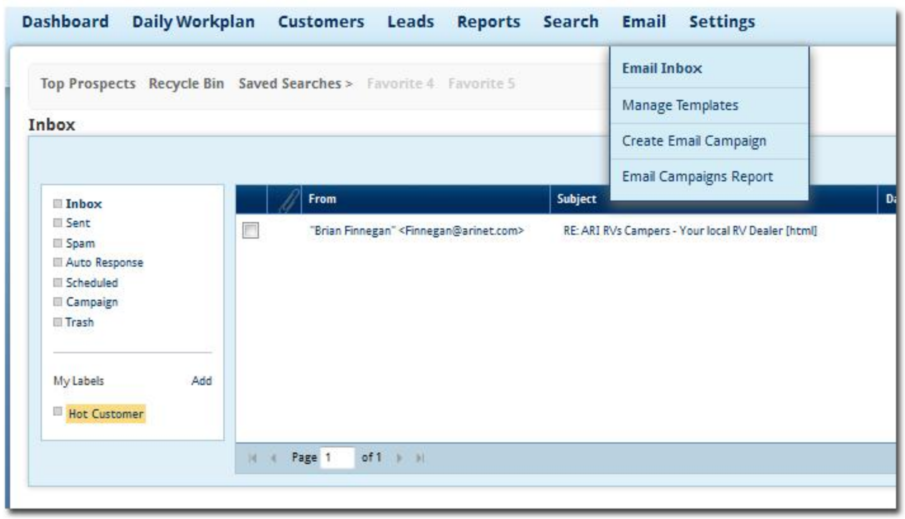
4. Click **Save** to save your changes and automatically exit the Edit My Signature page.

Note: If you decide not to use an email template to send email, but want to manually insert your email signature every time you send an email, simply click on the email editor toolbar.

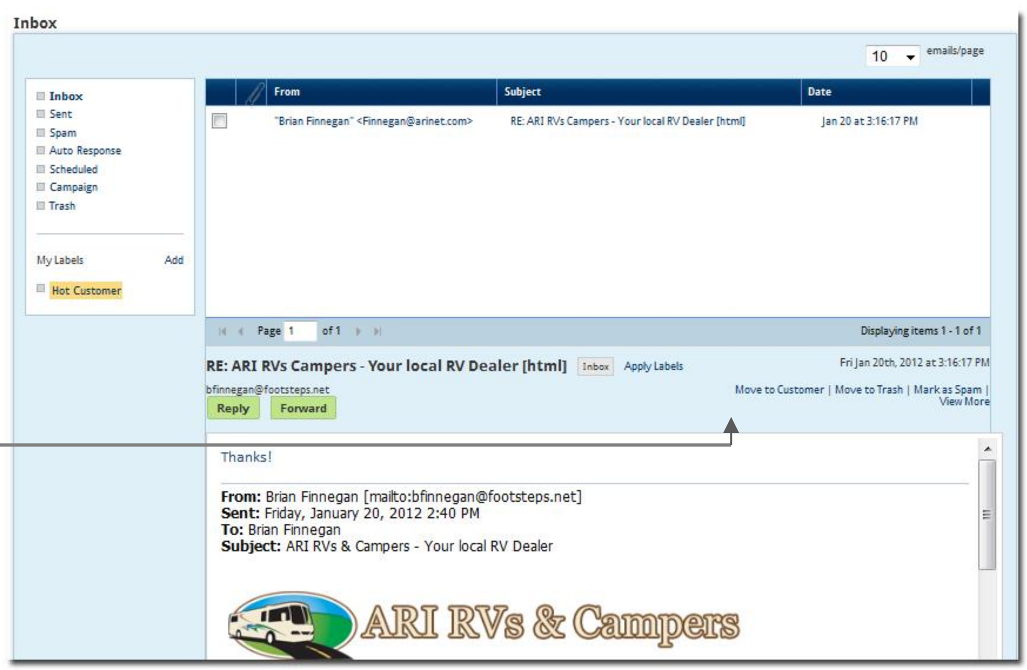
Email editor toolbar

Using the Email Inbox

Emails you receive from customers appear in the Email Inbox. To access the inbox, hover over **Email** from the top navigation and select **Email Inbox**.



From the Inbox you can reply to as well as manage your emails.



After opening an email in the Inbox, you can move emails to customer records. This will keep all the received emails in the customer's record.

Note: Any emails your customers receive from you use your "footsteps.net" email address. If customers are not familiar with receiving emails from you at this address, you can also CC: your company email account. (Sending an email to the customer about adding you as a "safe sender" may also be helpful.)

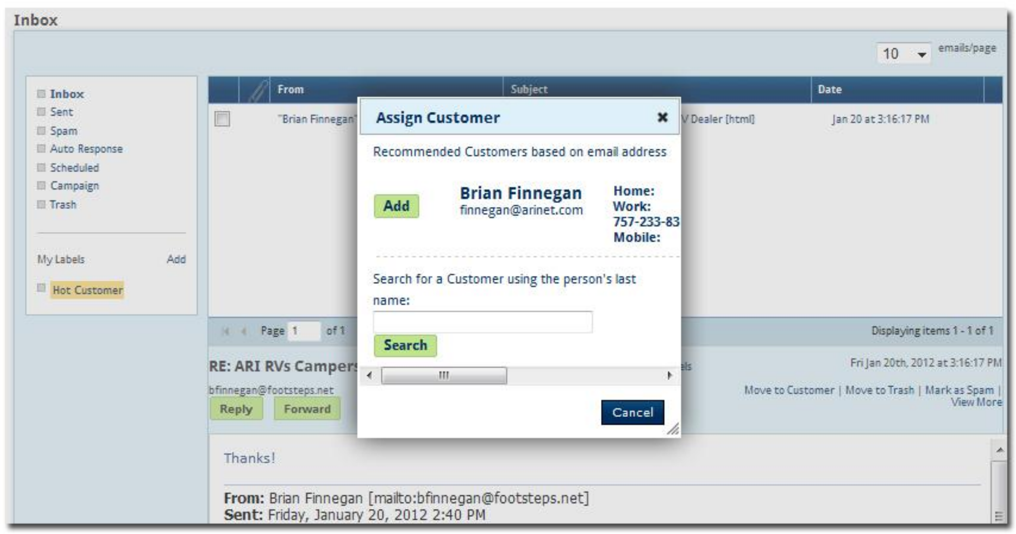
If a customer sends you an email to your company email account, you can forward that email to your “footsteps.net” email address and then move that particular email to the customer’s record. This way you have a history of the communication with the customer stored within FootSteps.

Moving an email to a customer record

If you have an email stored in your Inbox that you want moved to the customer record, follow the steps below.

1. Within the email, click **Move to Customer**.
2. On the Assign Customer pop-up box, if the correct customer appears, click **Add**. If this is not the correct customer, you can type in a name and then click **Search** and then click **Add**.

   FootSteps uses the email address to find the customer in the database. If the customer replies with a different email address you many have to search for the customer’s record in FootSteps.



After you move the email to the customer, the email will be gone from the main FootSteps email inbox. To access the email, go to the customer’s record and click the Email tab.

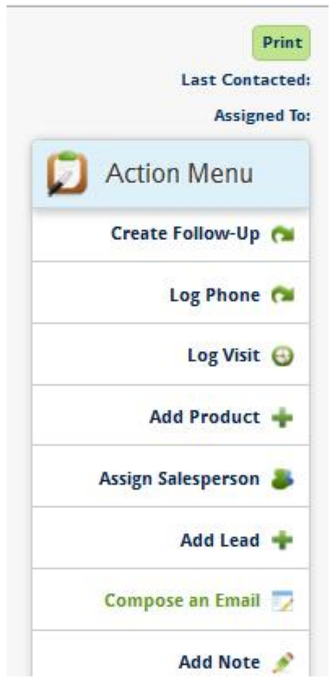
See Composing an email for instructions on sending an email from a customer record.

Composing an email

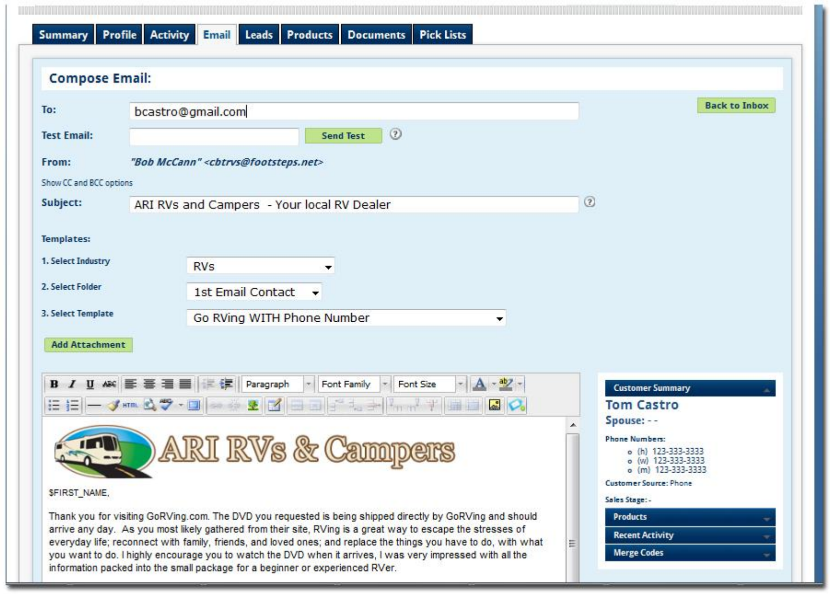
If you've sent email in a program such as Outlook, Gmail, or other email programs, you'll have no problem using the FootSteps email editor. Follow the steps below to compose an email.

Note: If you want to ignore our suggestion and send a plain email, skip the selecting template section!

1. When you are viewing a customer record, click **Compose an Email** from the Action Menu on the Summary tab.

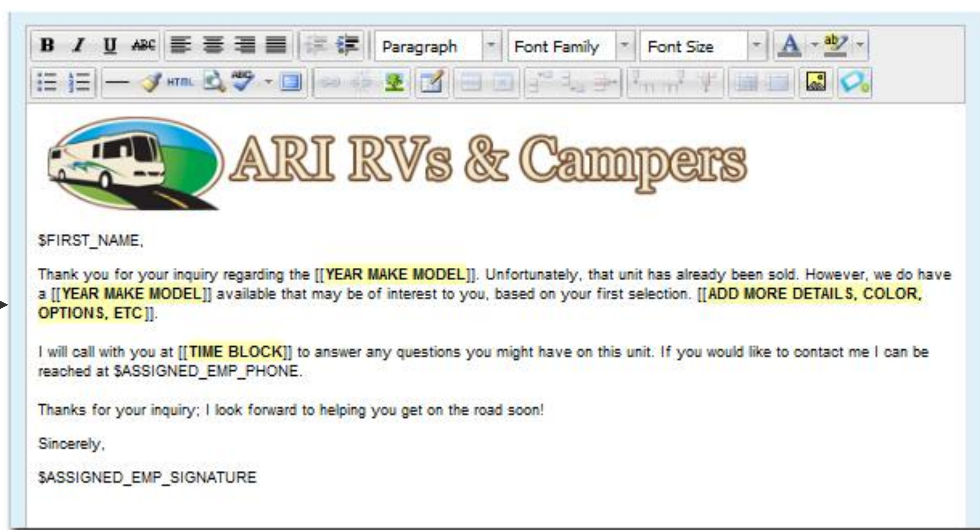


2. If needed, review customer data with expandable data section alongside of email editor – Customer Summary, Products, and Recent Activity. Use the appropriate email template. Your Enterprise Manager sets up your company's email templates.



3. Select the appropriate industry.
4. Select the correct email folder **(**such as 1st Response, Follow-Up).
5. Select the template you want to use.
6. $FIRST_NAME is a merge code and will populate when email is sent. Click **Popup Preview** to view email with merge codes filled. Chances are you will have to allow popup-blockers for FootSteps to see this Popup Preview.
7. Click yellow [[text prompts]] to add personalized text.

Clicking the yellow, highlighted prompts allows you to quickly add detailed information to your email.



8. Add or delete additional text as you see fit.
9. Your email signature automatically inserts if the merge code, $ASSIGNED_EMP_SIGNATURE is present. If you have not created an email signature yet, refer to Creating your email signature section for instructions.
10. Click **Send**.

A copy of email will be stored in Summary (last five activities) Activity. or Email tab in the customer record.

Note: Only emails sent via a template will mark a lead as contacted. This is required to ensure consistent company branding. If there is not an appropriate template in your list of templates, use the Dealer Stationary template.

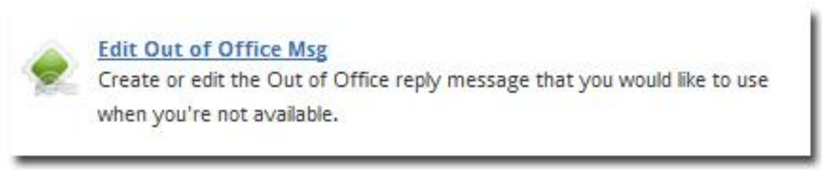
Creating an out of office message

A best practice when you are out of the office and can't respond to emails is to create an out of office message. This is the message that customers automatically receive after sending you an email.

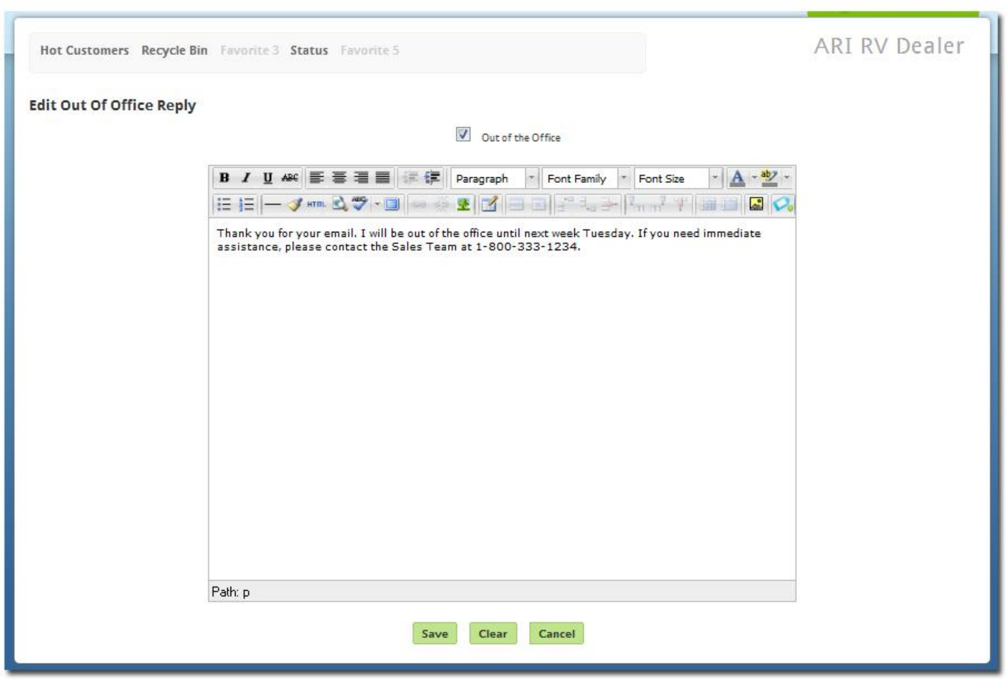
To create and out of office message, follow the steps below.

1. Select **Settings** on the right side of the top navigation.

2. Click **Edit Out of Office Msg**.



3. Using the email editor, type your out of office message in the text area. This is the message that customers receive from you.



4. Make sure the Out of the Office checkbox is selected.

5. Click **Save**. The message you wrote saves for easy updating the next time you need to let customers know you are out of the office.

Your out of office message is now active. When you log back in to FootSteps you will see a notification on your Dashboard that indicates that your out of office message is activated.

Remember: Deselect the Out of the Office checkbox when you are ready to respond to leads. If you are included in an Auto-Assignment queue, FootSteps passes you over until to turn off your out of office message.

Launching Email Campaigns

FootSteps makes delivering emails and reporting on the campaigns easier and keeps a copy of the email in each customer FootSteps record. Email campaigning from FootSteps starts with drafting your message, frankly this is the hardest part, what are you going to say?! Once you have you message ready it's time for the easy part

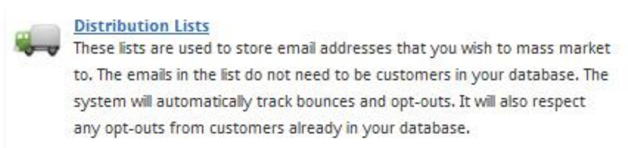
Using distribution lists

Before we get into the main steps for launching your Email Campaign, we recommend that if you want to use a distribution list (emails that you have obtained in your email program that do not have names) go ahead and set that list of first.

> **Example**: If you obtained a list of email addresses without names over a period time, you can enter them in FootSteps using the Manage Distributed Lists page. This is not the preferred method due to the loss of tracking abilities. But if you want to create distribution lists, follow the steps below.

To add emails addresses (that do not have names) to FootSteps for email campaigning:

1. Select **Settings** on the right side of the top navigation.
2. Scroll down to **Email** and select **Distribution Lists**.

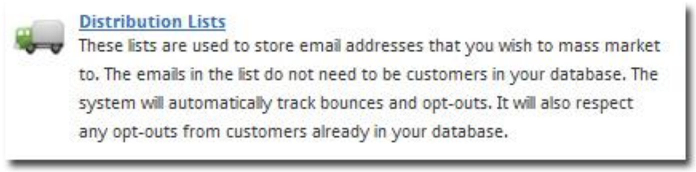


3. Click **Add Distribution List** from the Action Menu**.**

4. Name the list with an easy name to remember.
5. Add a description if the name is not obvious.
6. Add recipients by typing or coping and pasting emails separated by commas or line returns.
7. Click **Save** to store distribution list.

Editing distribution lists

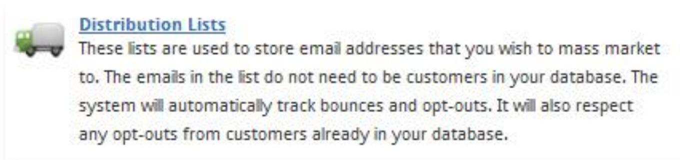
1. Select **Settings** on the right side of the top navigation.
2. Scroll down to **Email** and select **Distribution Lists**.



3. Select  to edit a distribution list. Click  to make any necessary deletions. Note the Bounced or Opt Out email address and Last Updated status columns.

Launching an Email Campaign from a distribution list

1. Select **Settings** on the right side of the top navigation.
2. Scroll down to **Email** and select **Distribution Lists**.

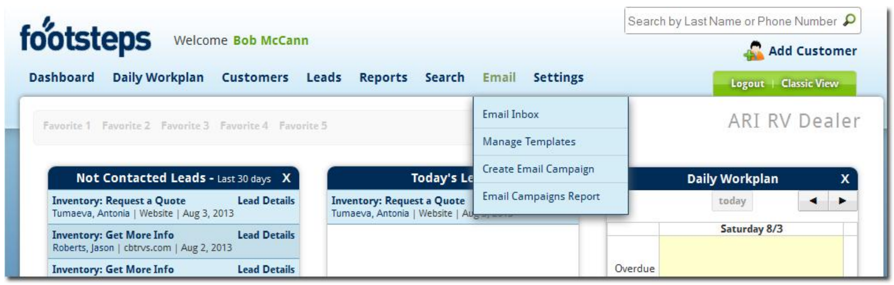


3. Select  to the right of the selected Distribution List.
4. Follow the steps for Creating an Email Campaign in the next section and the selected distribution list appears as preselected.

Creating an Email Campaign

Setting up an Email Campaign contains four main steps with a few sub-steps along the way: define your Campaign, select recipients, compose your message, and set up delivery confirmation.

To create your first Email Campaign, click **Create Email Campaign** from the drop-down menu under **Email** on the top navigation.



Step 1 – Define Campaign

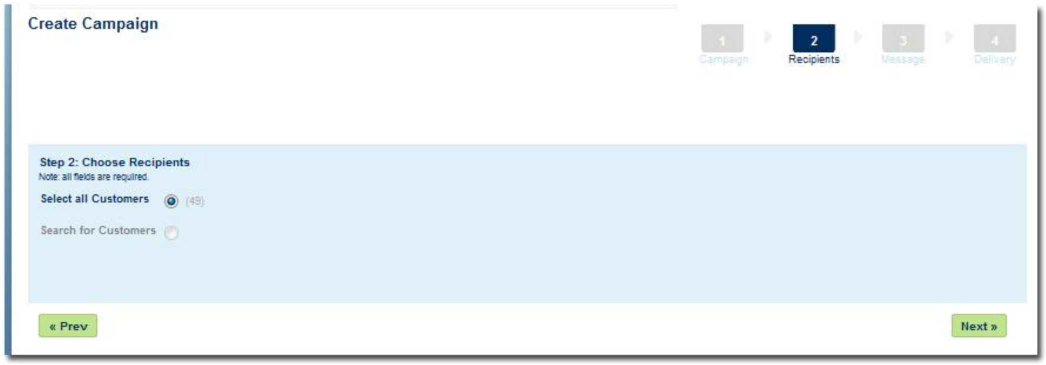
1. Name or define your Email Campaign to make it easy to reference the report later for reporting purposes.

2. Click **Next**.

Step 2 - Select the customers to receive the report.

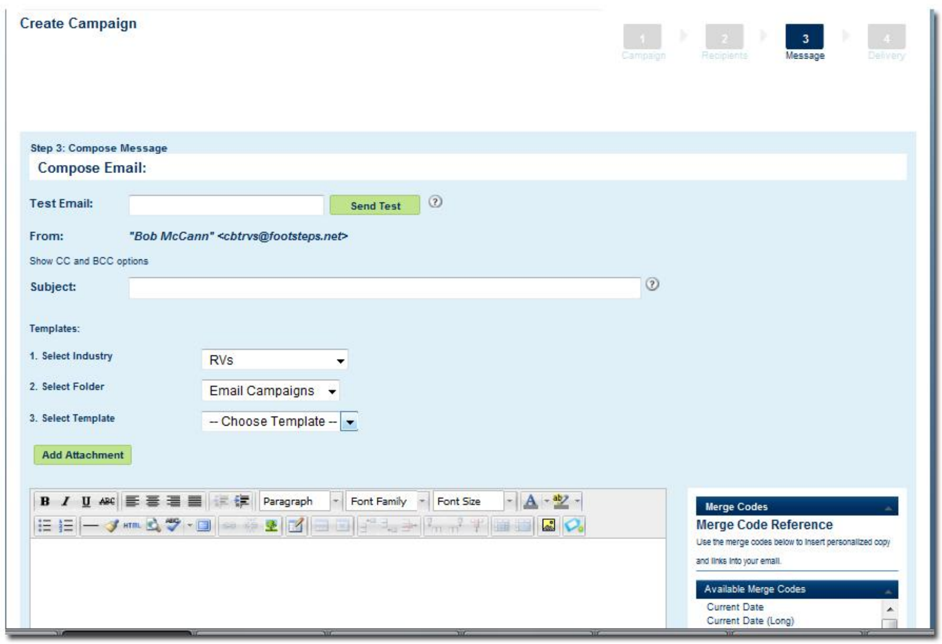
There is no limit on the number of customers you can select.

3. Click **Select all Customers**. This only picks up customers with valid email addresses, unbounced email addresses, and non-opt out status. Refer to steps in Launching an Email Campaign from a distribution list if you want to add additional recipients.



Step 3 – Select Message.

Ideally your message should already be setup and ready to go at this point and all you would have to do is select the proper template and test, or go to the next step.



4. To insert a ready to go template, select the **i**ndustry-specific the template that is stored.
5. Select the folder the template is stored in (such as Email Campaigns).
6. Select the appropriate template.

Some users like to test the email to ensure the merge codes and hyperlinks are working before launching the email campaign. Simply add your email address to Test Email field and click **Send Test**. You should receive this email quickly depending upon emails campaigns in queue. The merge codes will populate from the first customer on the list. Be sure to click the hyperlinks to ensure they link to the intended destination.

Change the "From Name" to the assigned Salesperson's FootSteps name. This is another feature that makes email campaigning from FootSteps so unique. Simply by selecting this feature shows the email to come the salesperson rather than just the company.

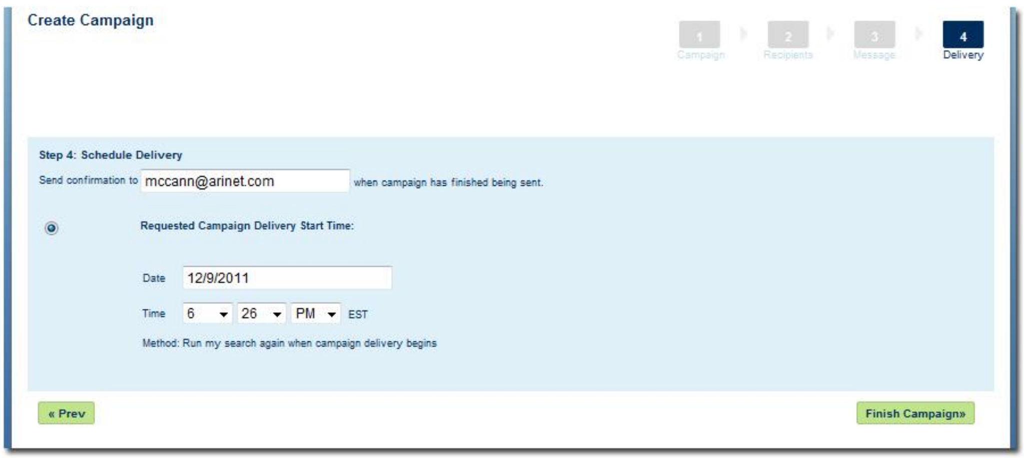
Our test show that emails arriving from an individual the recipient knows get opened and click-thru 400% more often than ones coming from the company in the from field.

Change the "From Address" to the assigned salesperson's Footsteps email address. By selecting this feature, the emails replies from recipients will be sent to the assigned associate for fulfillment. Marketing personnel might launch the campaign, but with FootSteps the replies can go directly to the salespeople for quick engagement.

7. Click **Next**. Your email is now ready to be sent or scheduled for delivery.

Step 4 – Schedule Delivery

8. First you must confirm or change the address for delivery notification.



FootSteps sends confirmation that the campaign has been launched and also sends hourly reports on the open, click-thru, and opt-out rates. You can stop these anytime from the email notifications.

Set Campaign Delivery Start Time. An astute email campaigner knows the best time to launch email campaigns in their market for optimal open and click-thru rates. As a general rule, middle of the week and middle of the day are the best time to send a campaign. Simply set the date and time you want to send and FootSteps will launch as close as it can to that time.

If you want to launch NOW, just click **Finish Campaign** and the current date and time will be submitted.

> **Note**: FootSteps will update your search query prior to the campaign to include all intended recipients.

Reading Email Campaign reports

One of the many benefits of marketing through emails is the immediate feedback to the number of recipients that open the email and click on any of the links in the email. The other factor that should be closely watched is the opt-out rate. Most novice campaigners ask: "What is a good open, click-thru, or opt-out rate?" Frankly, every market, market segment, industry, and campaigner run the gamut on rates and the best ones for reference should be your own. Constant adjustments should be made to subject lines, time of day, and content and then the rates compared to see what works best for you.

1. Hover over **Email** in the top navigation, and select **Email Campaigns Report**.
2. Click the title of the email to launch the Email Campaign Stats window that you can leave open to watch the campaign in real time.
3. Here is the data you can review on the report:

- **Number Sent**: click this value to open a list of the customers the email was sent to.
- **Opens**: click this value to open a list of the customers that opened the email. The most accurate number requires a code to travel back to FootSteps. Recipient's firewalls and security settings may block this code and understate the open rate. This is even more reason for a company to use their own stats for comparison. *Don't get discouraged at low open rates. Remember customers have to read your name before deleting the email and is still a valuable impression. When the time is right for this customer to make a purchase decision, they will more apt to remember your company.*
- **Clicked**: click this value to open a list of the customers that clicked on a link in the email.

Example: If you formatted a hyperlink to link recipients to a new product. The Clicked value would generate a list of the most interested customers to continue a more focused sales strategy. This value is extremely accurate due to direct path from the hyperlink.

- **Opt-Outs**: these are the number of customers that unsubscribed from your email campaigns. This number is also very accurate and should be monitored for too much movement. The leading reason for high opt-out rates are non-relevant emails delivered at the wrong time or too often. Customers that unsubscribe are only opting out of email campaigns. You can still personally email these customers or include them direct mail campaigns.

Reports are archived by year and accessed by selecting the year from the Year drop-down menu.

A note about Open Rate:

Open Rate Metrics are unreliable: The fundamental reason email open rate metrics are unreliable is that the metric relies on a tiny image in the email being downloaded by the person reading the email. When this image is downloaded from the web into the person's email reader, the software counts that email as being read. This is the only way that anyone has been able to figure out how to track if someone opens an email, and all email marketing systems use this method.

Here are some examples of the impact of this technology on the open rate metric.

- **Outlook.** For a few years now, the most popular business email client, Outlook, blocks images by default. This means that as more people upgrade to more current versions of Outlook, your open rate will decline, even if people don't really change their behavior.

- **Web Email.** More and more web based email systems like Gmail and Yahoo are also blocking images. Again, this means that more and more people will not show up as opening your email even if they have not changed how often they read your email.

- **Mobile Devices.** Many mobile devices (like the Blackberry) read email in text format by default. In text format, no images are downloaded, so if someone reads your email on a Blackberry, it is not counted in your open rate. So, if the people on your list have been using mobile devices to read email more that would decrease your open rate.

Are you getting what the problem is here? Messages that have images in them are the only messages you can track open rates. Yet most mail programs block images from getting through. That means that if they block the images even if people are opening your emails you won't know it.

Then there are a couple of other problems. First are Spam filters. Spam filters are more common, and some are set so high, you need a Coast Guard Cutter to break through. Plus, because so much of the Spam email that sells you cheap prescription drugs, Spam filters are more likely to filter out emails with images in them that text emails. BTW – have you noticed that more Viagra emails are arriving as text emails and no longer contain images? They figure they would rather get to your inbox without being able to check the open rate, than run the risk of going right to Spam since it is unlikely you can check the open rate anyway.

Start looking at Click Through rate, it's a 100% accurate.

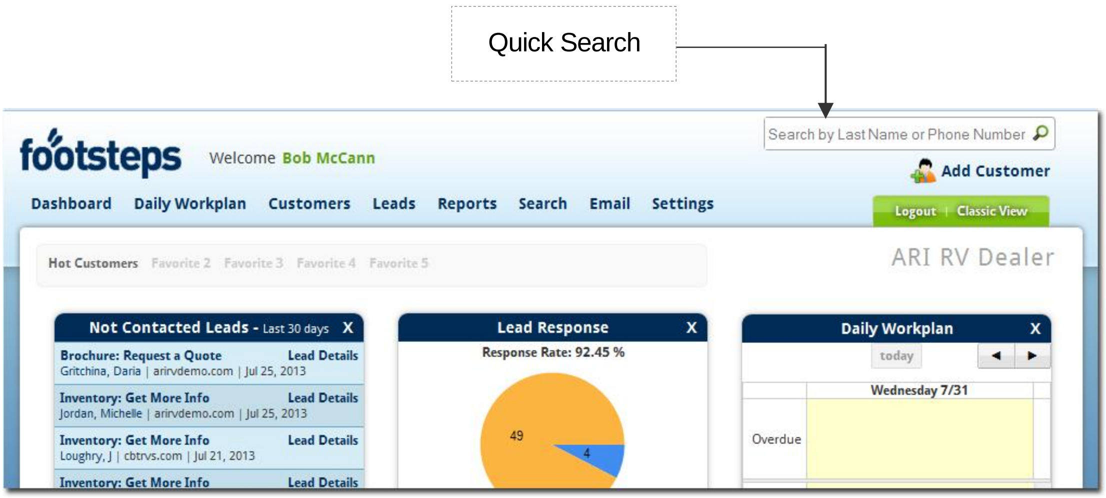
Searching in FootSteps

The payoff for diligently adding all prospects and customers to FootSteps is the ability to return a customer or a list of customers that have in interest in your products or the lifestyle you support. The ability to search FootSteps is nearly endless starting with the most frequent method of searching for a customer via Quick Search to using the advance search features.

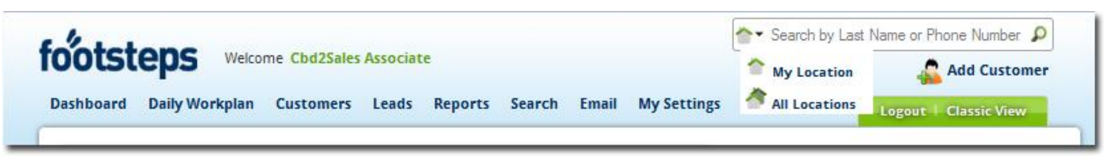
Using the Quick Search

You can access the Quick Search at the top right corner of all the pages. Use this field to quickly search for customers.

1. Type the customer's last name or phone number and press **Enter** to begin your search.



If you have the option to select multiple locations, select  to determine which location to search.



The search is not case sensitive and if you not sure of the spelling, you can search with the letter(s) you think it starts with. i.e. Searching for Finnegan and you're not sure how they spell it, you can search with "Finn" and all customers whose names begin with Finn will return. Enterprise Managers and Sales Assistance can search all customers in FootSteps and Sales Associates can search customers assigned to them. If Sales Associates have the ability activated to search other salesperson's customers, they can search all customers and open customers not assigned to them in a read only access.

Setting up rules for the advanced search

To perform detailed searches in FootSteps, access the Advanced Search page from the Search option in the top navigation.

Using the different types of search criteria

Search Customers: When you add specific search criteria for customers, your search results include a list of unique customers without any duplications.

Search Leads: When you add specific search criteria for Leads, the return will return every lead. This is because if a customer submitted two or more leads the return will contain duplicates.

Refer to the next page for a brief overview of the search criteria.

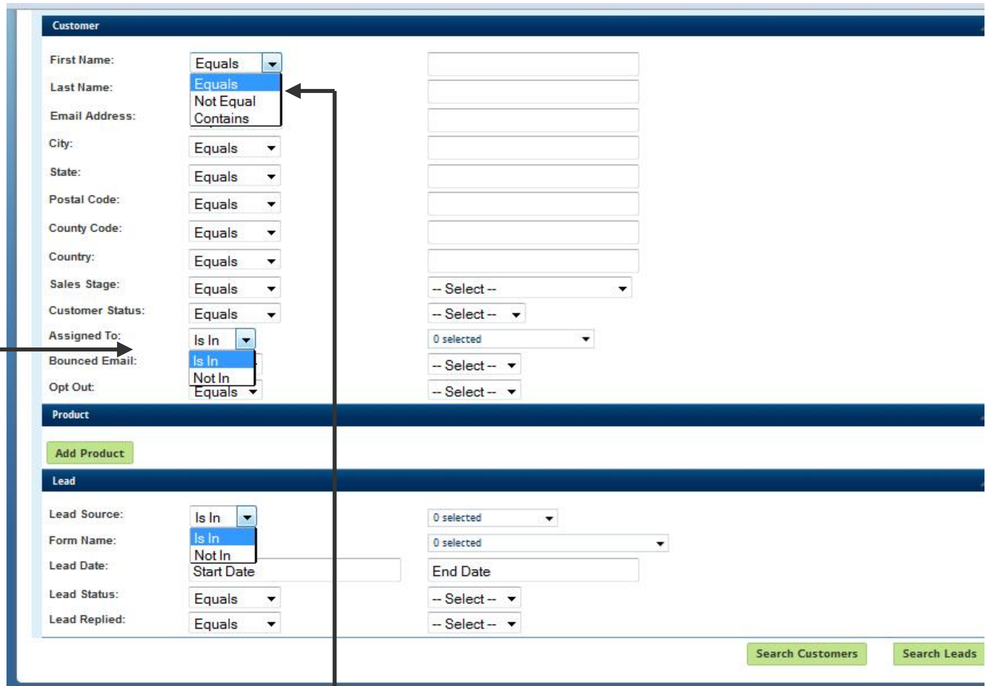
The graphic below highlights some of the rules you can apply when setting up your search – these rules help you precisely find what you are looking for in FootSteps.

Is In (defaulted) – When selecting **Is In** the return will contain customers that are in **(Is In)** the fields you typed or selected.

For example: If you want to return a list of customers that submitted Service and or Parts web lead forms, select **Is In** and select **Service and Parts forms**

Not In – When selecting **Not In** the return will contain ALL customers that are not (**Not In**) the fields you typed or selected.

For example: you want to return a list of **ALL** customers that **didn't** submit Service and or Parts web lead forms. Select **Not In** and select **Service and Parts forms**.



Equals (defaulted) – When you select Equal, the return contains exactly what you typed or selected for the Search Field. For example: select **Sold** in the **Sales Stage** field and keep **Equals** selected the return will be those customers that are marked **Sold** in the customer profile.

Not Equal – When you select Not Equal, ALL customers other than what's typed in or selected will return. For example: select **Sold** in the **Sales Stage** field and select **Not Equal** for the search mode and the returns all customers NOT Sold.

Contains – Contains is a "wildcard" search and returns customers containing any particular word or part of a word the field searched. For example: you want to find customers that live in Florida. You're not sure how all of them were entered, Florida, FL, or FLA. So Type **Fl** into to the **State/Provence** search field and all customers living in Florida will be returned.

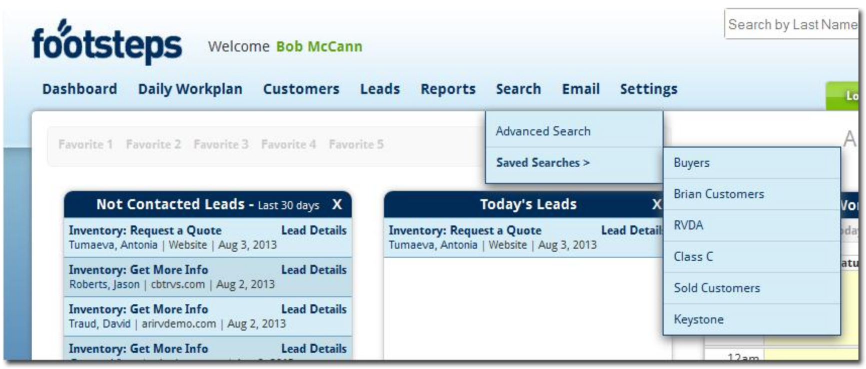
Saving your searches

After searching for a list of customers and find yourself searching for that list of customers often, you may want to save the search so you can search for the list with only one click.

FootSteps will always return the most updated list as add or delete customers from the search parameters.

1. After searching customers or leads and the list of customers returns, select **Save Search** from the Action box at the bottom of the list of customers.
2. Name the search and add a description if the name is not obvious.
3. Click **Save.** The search parameters save.

Access your saved searches from the drop-down menu under **Search** in the top main navigation.



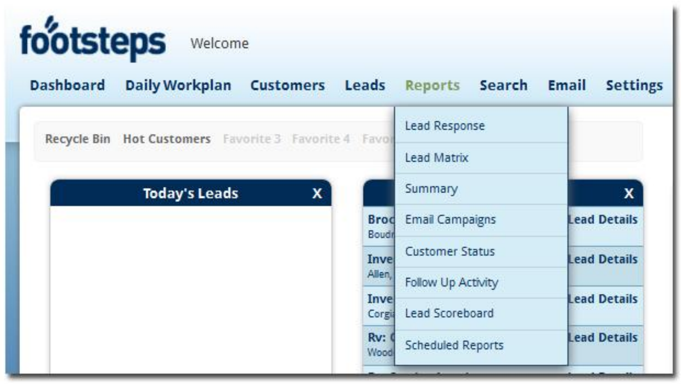
- Hover your curser over **Saved Searches** and your saved searches appear. Select the **Saved Search** and an up-to-date list will return using your saved parameters.
- **Delete Saved Searches:** access these Saved Searches from the drop-down menu under **Search** in the top main navigation. Click **Saved Searches** and your saved searches will appear. Click and confirm the deletion by clicking **Ok**.

Using the FootSteps reporting features

Another payoff for using FootSteps is the reporting that becomes a perfect tool for coaching your team to higher performance in addition to the daily accountability to where no customers fall between the cracks. Several of the reports are also Widgets that you can add to the Dashboard (See Navigating around the Dashboard and Understanding the types of Widgets) for quick reference.

In addition to viewing the reports in FootSteps you can schedule the reports to be emailed to one or all stakeholders.

You can access the reports from the drop-down menu under **Reports** on the top navigation menu.



Quick summary of reporting features

Before creating your first report, read some of the following tips below.

- Most reports allow for selecting date ranges. Select the date ranges available and select **Refresh.**
- The customize feature allows users to select or deselect parameters of the report. Click the + **Customize bar** to expand the selection area. The parameters selected will be saved for the next time the report is accessed.
- To export reports, select the format from the Export drop-down menu. Files available: PDF, CVS, Excel, PowerPoint, Rich Text, TIFF, Web Archive, and Word Document. Click **Export**. Follow the browser prompts to save or open export files.
- To print reports, click the printer icon and follow your browser prompts.
- Scheduling reports – An alternative and more proactive way to review reports might be to deliver them to stakeholder's inboxes. To do so, access the report you want to schedule and choose **Schedule Report** from the Action drop-down list. Select the Frequency, Time of day, Timeframe of the report, add Report Title, add Email Addresses to receive the report (separate addresses with coma), and select Report Format (PDF, Excel).
- After you save your reports, FootSteps delivers them accordingly.
- Scheduled Reports can be deleted from this list by clicking or they can be deleted by the person receiving delivered report directly from the email they receive.

Types of reports

The table below gives you a quick summary of the different types of reporting information gather from FootSteps.

Report	Summary
Lead Response	The Lead Response report is an extension of the Lead Response Widget and access to this report can also be gained from the Widget. This is an excellent report to be scheduled to arrive late morning daily that will show the status and response time for all leads from the day prior.
Lead Matrix	Keeping an eye on your lead count and how it compares to last month or last year is a good insight on market trends or improvement made to your website. Remember you can trim the report with the **Customize** feature to exclude certain lead sources for more focused reporting.
Summary	The Summary pulls together Sales, Floor Traffic, Desklog, Total eLeads,Compliance, and Productivity logged by Sales Associates for each location. The report displays the number of sales and number of visits and calculates a closing ratio. Remember, the report can be adjusted by choosing date ranges, TYD | MTD | This Week | Today | 30 Days, or select your own dates.
Email Campaign Reports	See Reading Email Campaign reports.
Customer Status	Now you can quickly pull up all the customers that have been tagged with one of your specific customer status. Example: you want to know how many customers are marked SOLD for a sales report or need to find out what's keeping them from being DELIVERED. It's only a click away.
Follow-Up Activity	This is a great fly on the wall report to know how sales activity has been scheduled and completed by your sales team. This report rolls up all the scheduled follow-up and logged phone calls and displays to show the difference in activity between each Sales Associate. It's often said by managers using FootSteps that the top performers on this list are also on top of the sales leader board. Remember, if you look forward in the report to see how much scheduled activity a Sales Associate has posted in their Daily Workplan, know that the percent of completion will be lower due to the activity not due yet,.
Lead Scoreboard	When you are good at managing leads the next logical step is to generate more leads! This report will help decide which lead source is producing the most leads and how you crew is managing them.