SYMPLYFY

USER MANUAL

Table of Contents

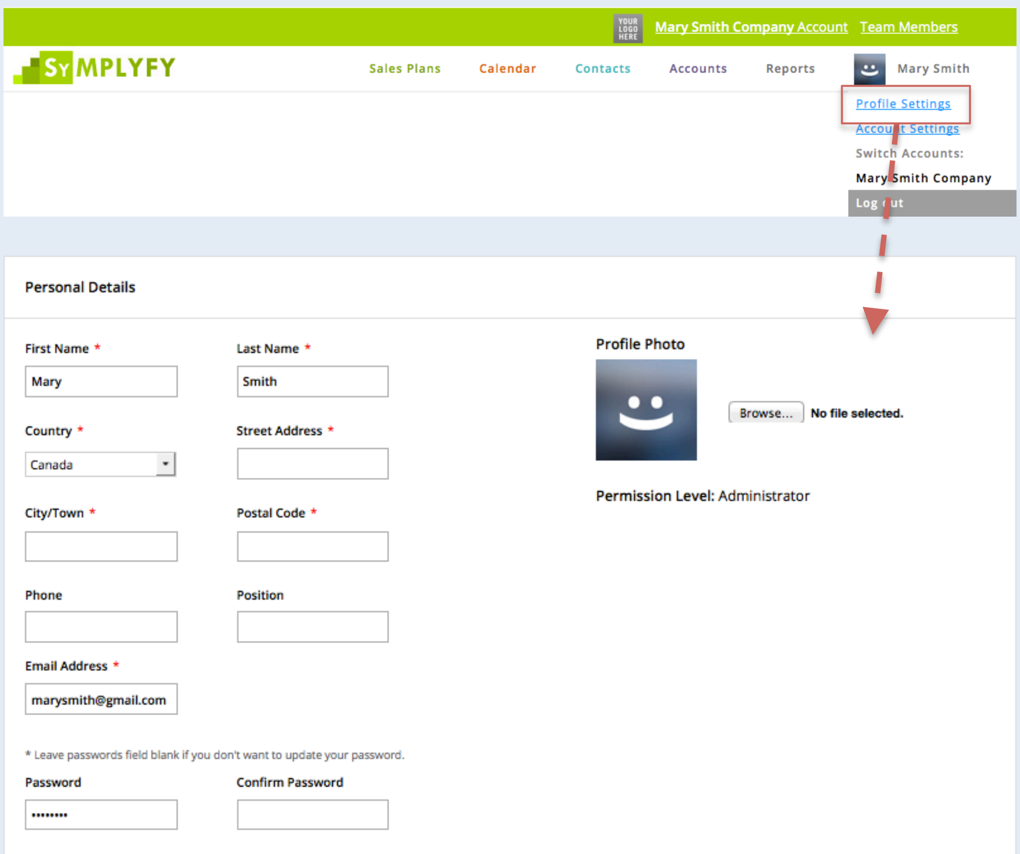
Profile Settings

Update your profile settings

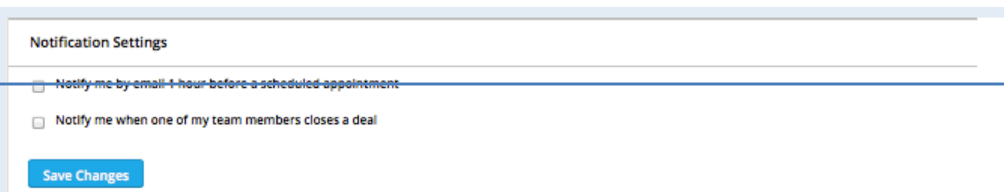
- **Email address and password** – change the email address and password linked to your user ID here. These changes will affect all your accounts and re-direct all notification emails to your new email address.
- **Update personal information** – change your profile photo, name, and address. Also, you can view your user permission level, which can be different for each account.

Email address and password

- Click your name, then update your info in "My Profile Settings"
- Changes made here will affect all accounts associated with this ID



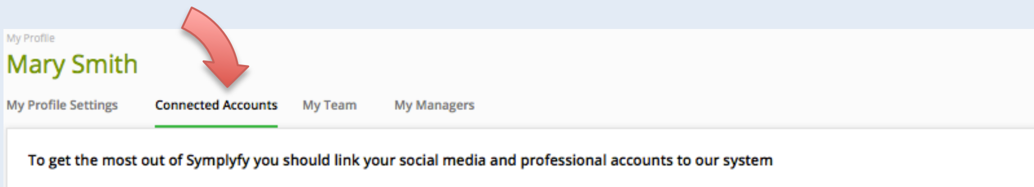
- Control if you want to be notified by email of activity on your account



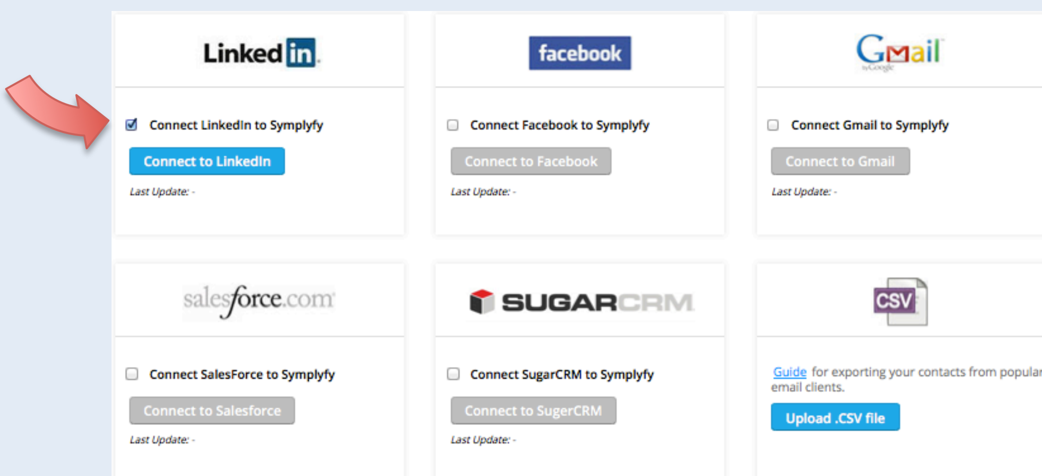
Link Your Accounts

- **Social/ Professional accounts** – link your accounts to upload existing contacts
- **CSV files** – contact lists exported to a .csv file can be uploaded into Symplyfy
- **Privacy** – users have the option to keep contacts uploaded through connected accounts private or to share them with all their team members
- **Identifying the source** – Symplyfy identifies how contacts are added to the system by associating the relevant icon beside each contact's name

  - Click the Connected Accounts tab

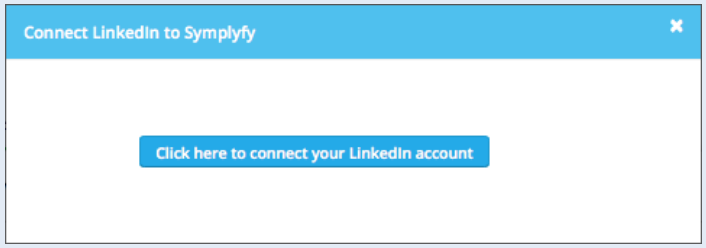


  - Select the checkbox beside the account you want to link. This will enable the "Connect to …" button.

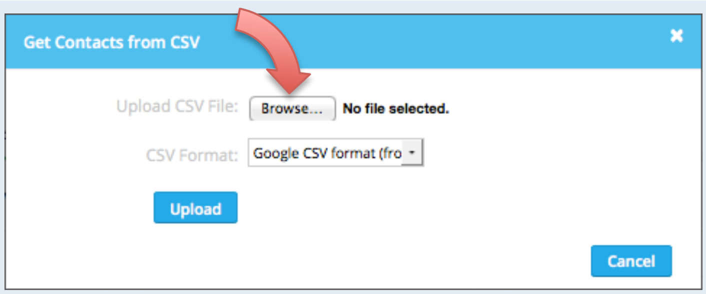


Note: only one user login can be associated with each account, i.e. once an account is linked, the user cannot add a second account.

- Click the button in the pop-up. This will re-direct you to your account login page, where you can grant Symplyfy access to your contacts.



- Or upload a .csv file from your computer by clicking on the CSV file upload button and then browsing your computer's file directory.



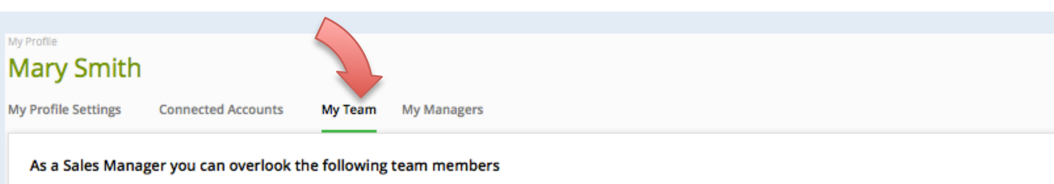
Double-check that your .csv file includes all required fields. For a guide on how to upload .csv files to Symplyfy, click on the "guide" link above the upload button.

Your Team

- **Team members** – see who's part of your team, grab their contact info and remind yourself what their role is in the company
- **Managers** – see who's running your team, grab their contact info and decide if you want to leave their team, i.e. jump ship.

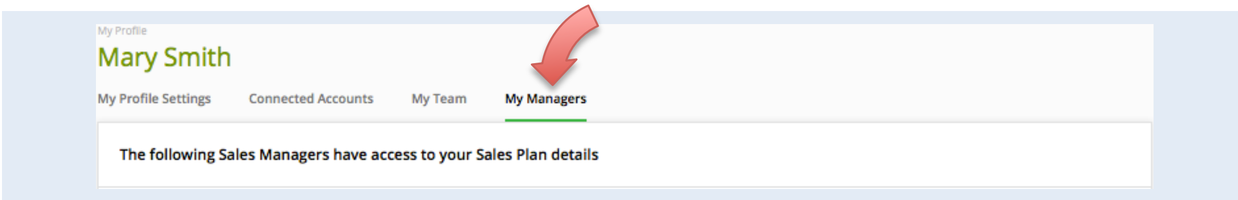
Team members

- Click the My Team tab

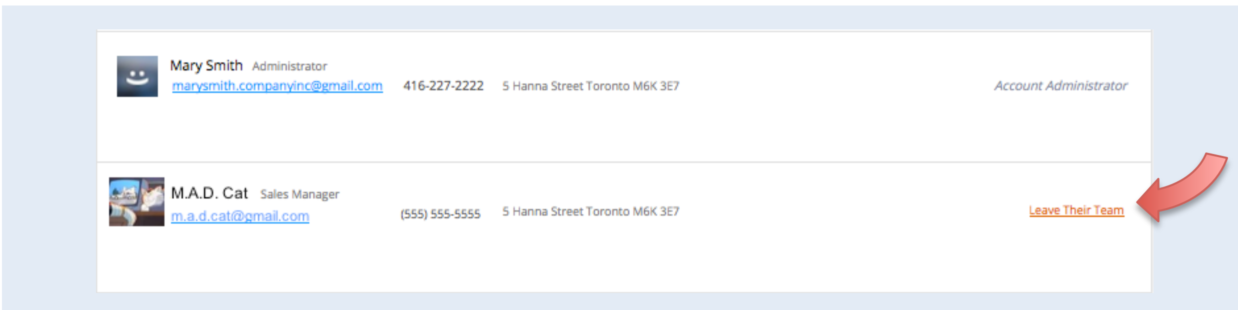


Sales managers

- Click the My Managers tab



- To leave a manager's team, click the link beside their info

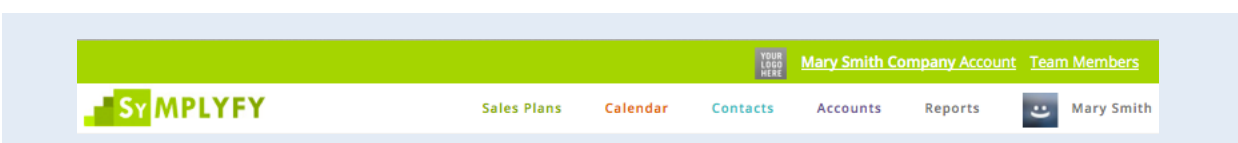


Your Permissions

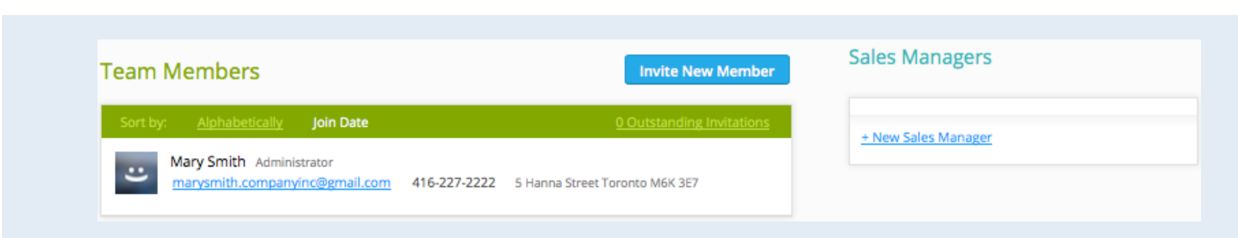
- **Administrator** – access to all account activities (sales plans, contacts, companies, team members)
- **Sales Manager** – views all account activities, with only access to their own and their team's sales plans
- **Sales Person** – views all account activities, with only access to their own sales plans, contacts, and companies
- **Coordinator** – views all account activities, cannot modify any account activities

Administrators

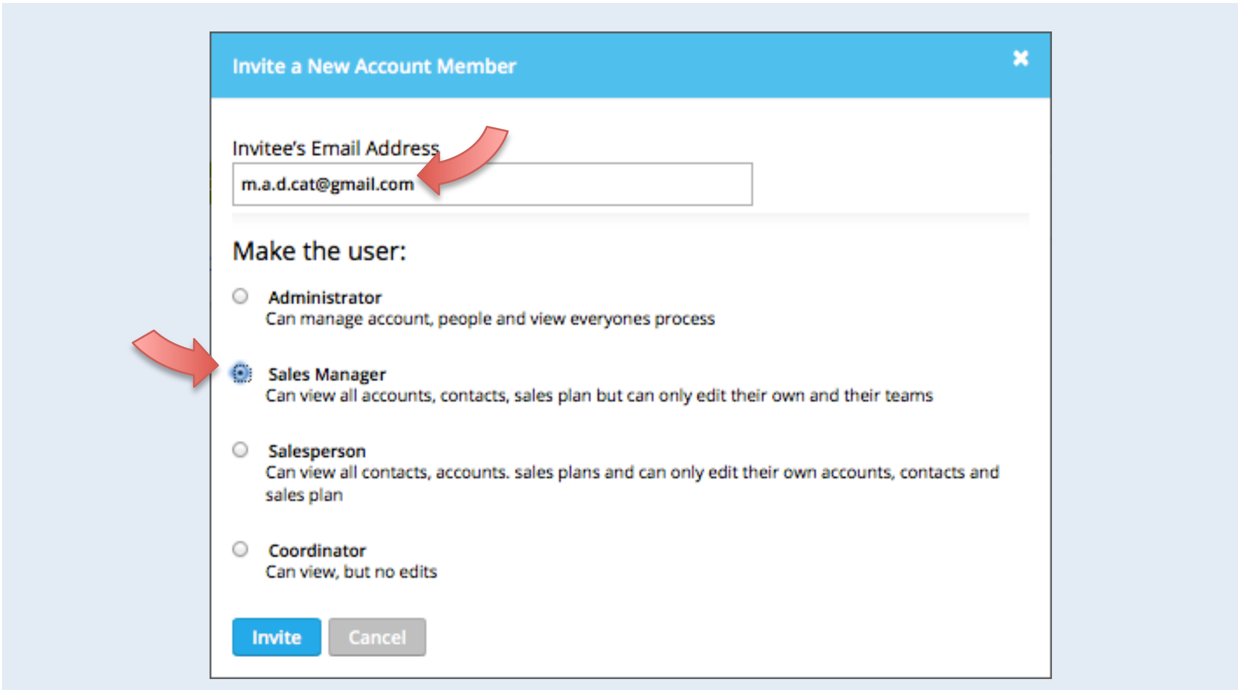
- Administrators can click on the top right main navigation link, Team Members



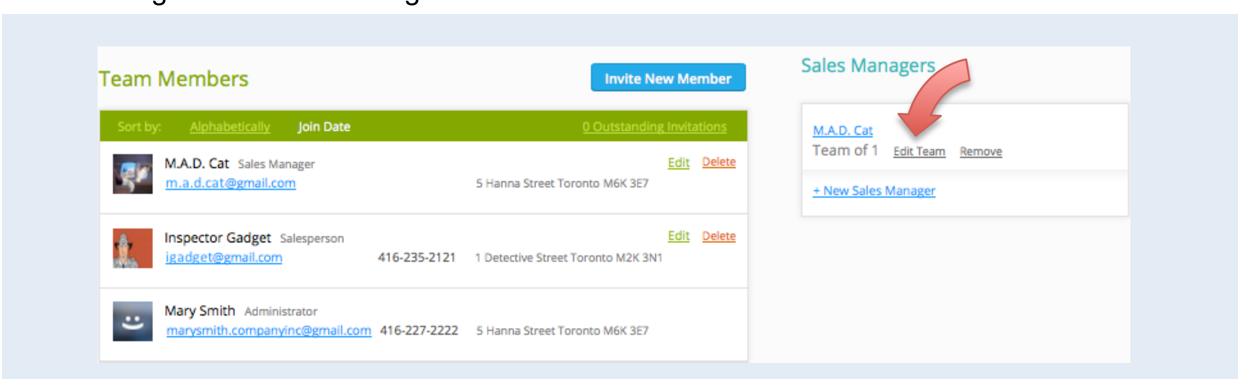
- Click the Invite New Member button to invite users to the account



- Type in your team member's email and select their role to control their level of access to activities on the account. Click Invite and an invitation to register will be sent to their email.

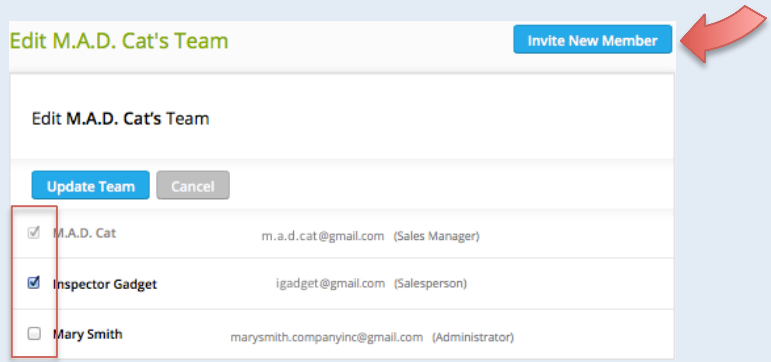


- Organize your members into teams, by clicking the Edit Team link under your designated Sales Manager's name

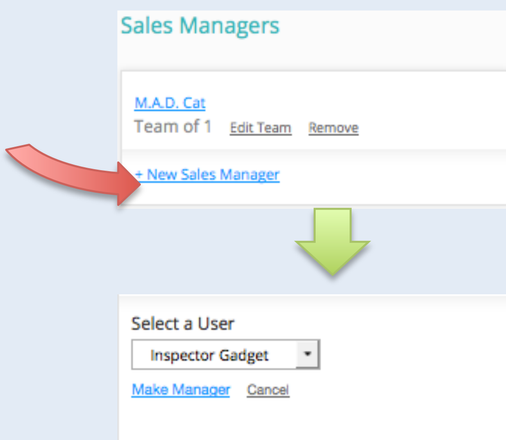


Edit the permissions of your team members using the edit options next to their names. Alternatively, remove a team member's access to your account by using the delete option.

- Select their team members from your list or invite a new member to this team.



- Select a new sales manager from a drop-down list, by clicking the + New Sales Manager link. Then save your selection by clicking Make Manager.

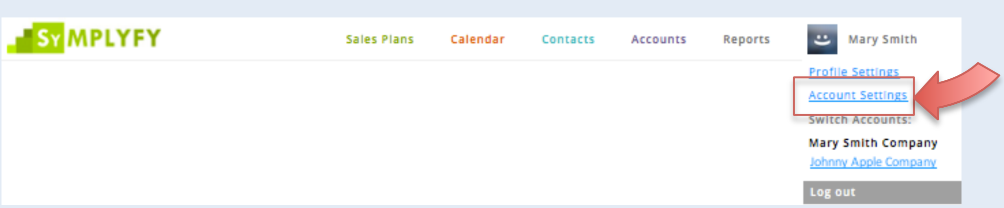


Your Account(s)

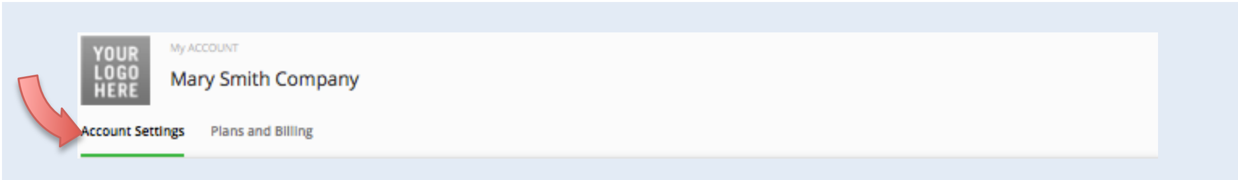
- **Account Settings** – View or change your account information, including name, logo and currency or billing information, including usage data, plan and upgrades.
- **Switch Accounts** – If you have multiple accounts, switch between the different accounts by using the main drop-down menu.

Account Settings

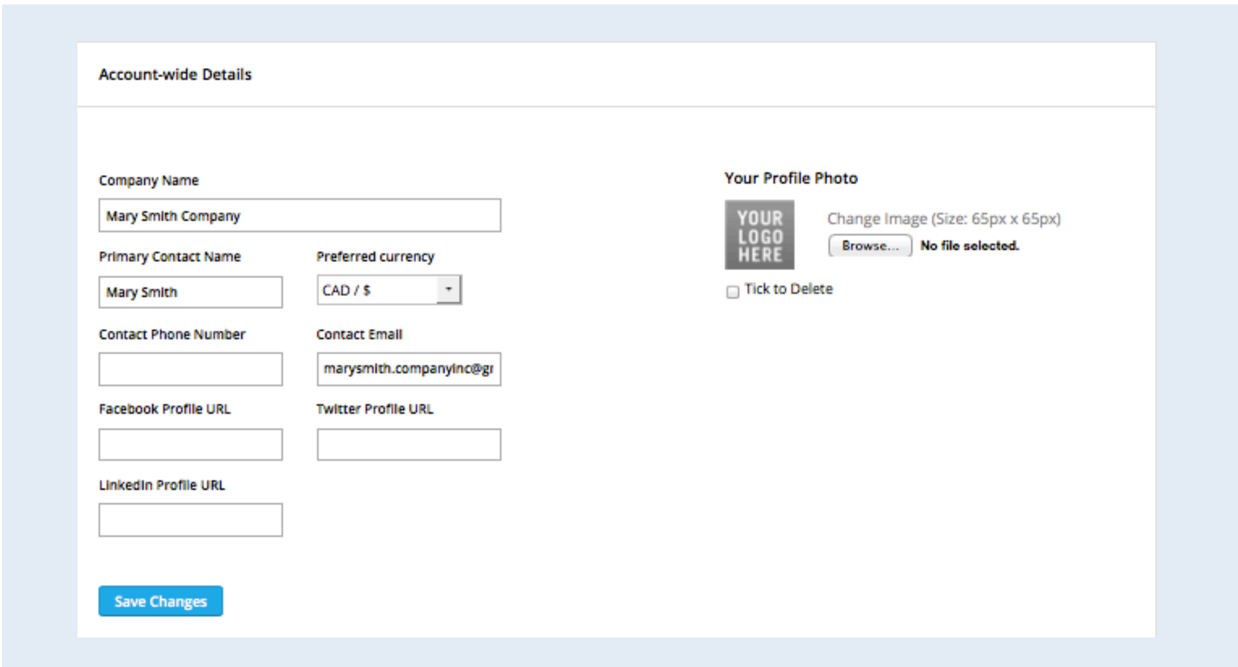
- Select Account Settings from the main drop-down menu



- Click on the Account Settings Tab

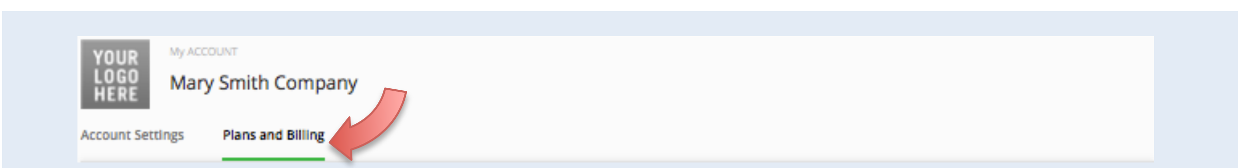


- Changes made here will affect all user IDs associated with this account

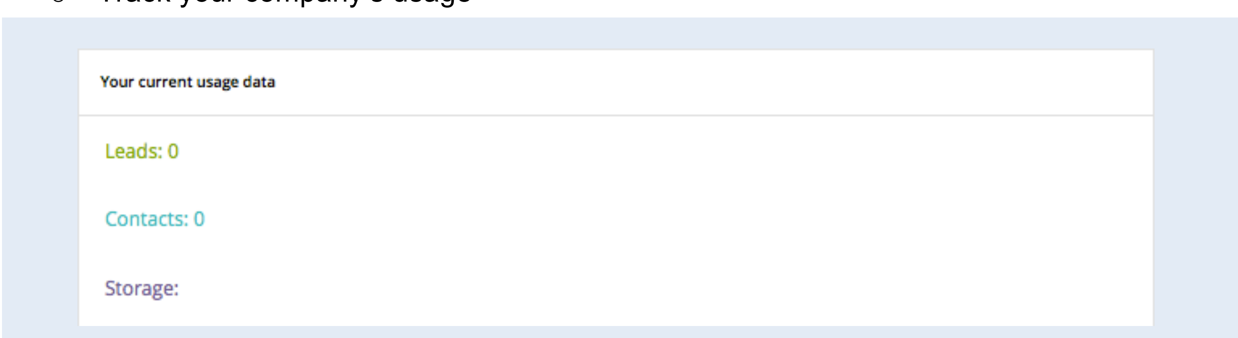


Plans and Billing

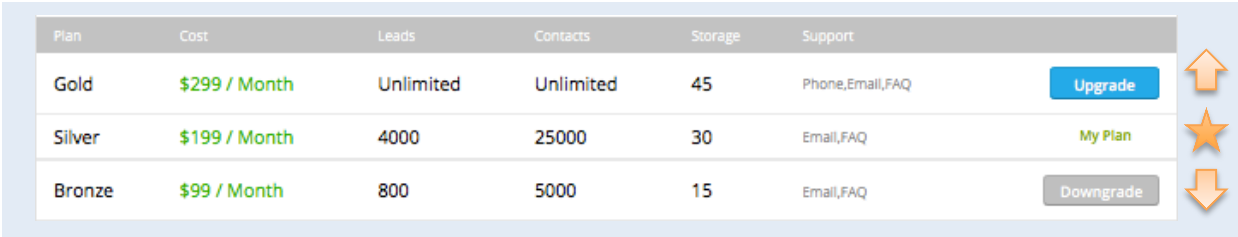
- Click on the Plans and Billings Tab



- Track your company's usage

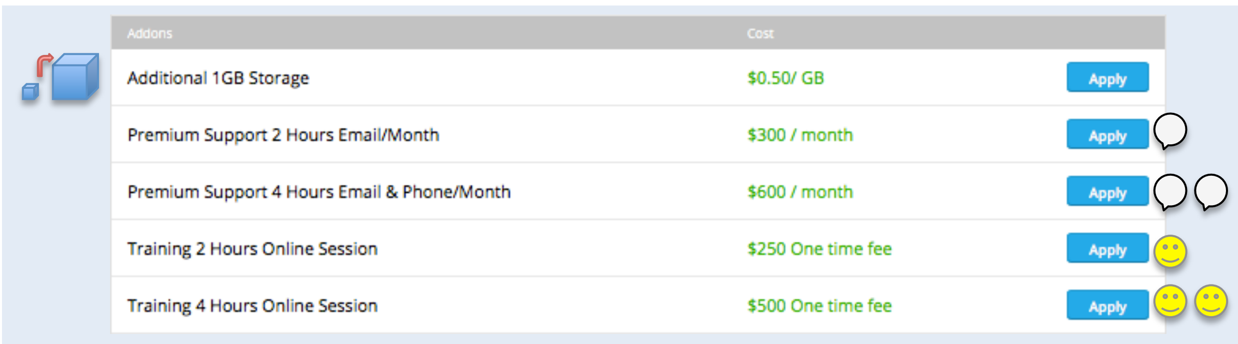


- Choose a different plan



Plan	Cost	Leads	Contacts	Storage	Support	
Gold	$299 / Month	Unlimited	Unlimited	45	Phone,Email,FAQ	Upgrade
Silver	$199 / Month	4000	25000	30	Email,FAQ	My Plan
Bronze	$99 / Month	800	5000	15	Email,FAQ	Downgrade

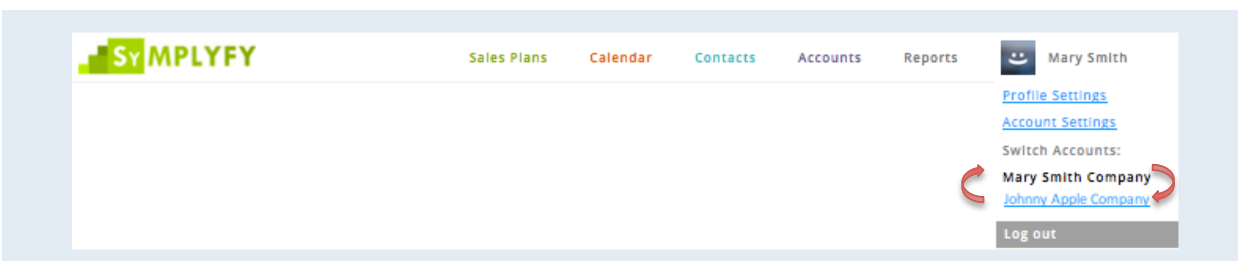
- Or choose an add-on for extra storage or get some help from Symplyfy's stellar support team when you need it



Addons	Cost	
Additional 1GB Storage	$0.50/ GB	Apply
Premium Support 2 Hours Email/Month	$300 / month	Apply
Premium Support 4 Hours Email & Phone/Month	$600 / month	Apply
Training 2 Hours Online Session	$250 One time fee	Apply
Training 4 Hours Online Session	$500 One time fee	Apply

Switch Accounts

- Select your other account in your accounts list in the main drop-down menu



Note: After switching accounts, you will need to re-enter your login credentials for security purposes.

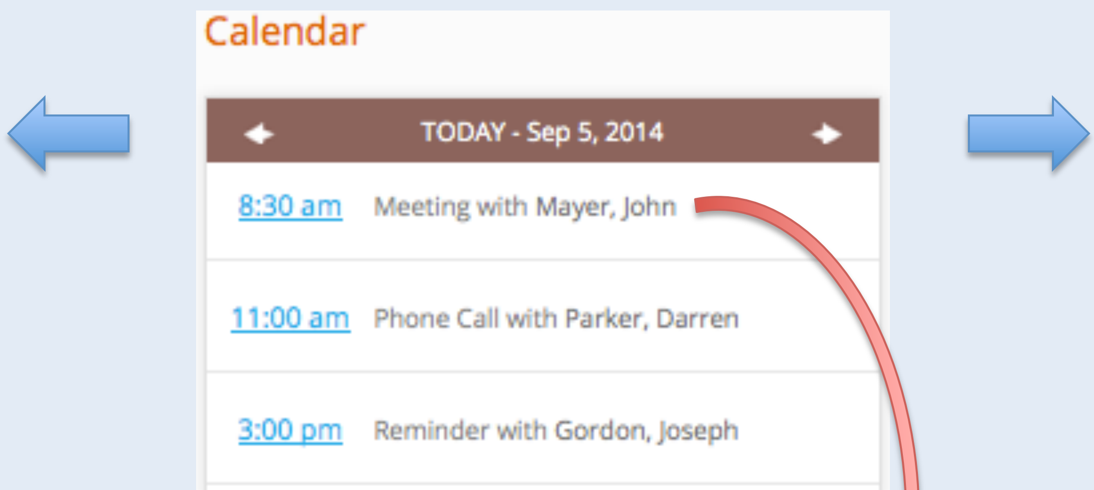
Dashboard Widgets

Calendar Widget

- **Daily calendar** – a quick snapshot of today's activities with the option to scroll back or forward to remind yourself of last week's appointments or to plan your week ahead.
- **View event** – a pop-up of your day's events and their important details.

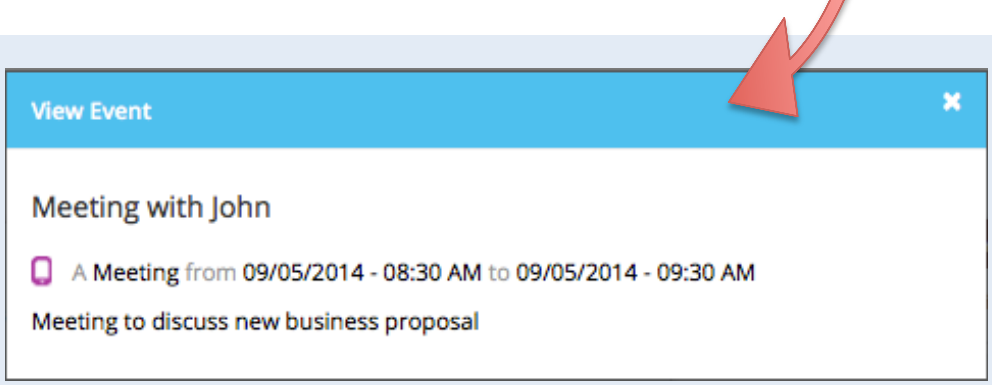
Daily calendar

- Click arrows to scroll through the week



View event

- Click on event time link to open event details pop-up



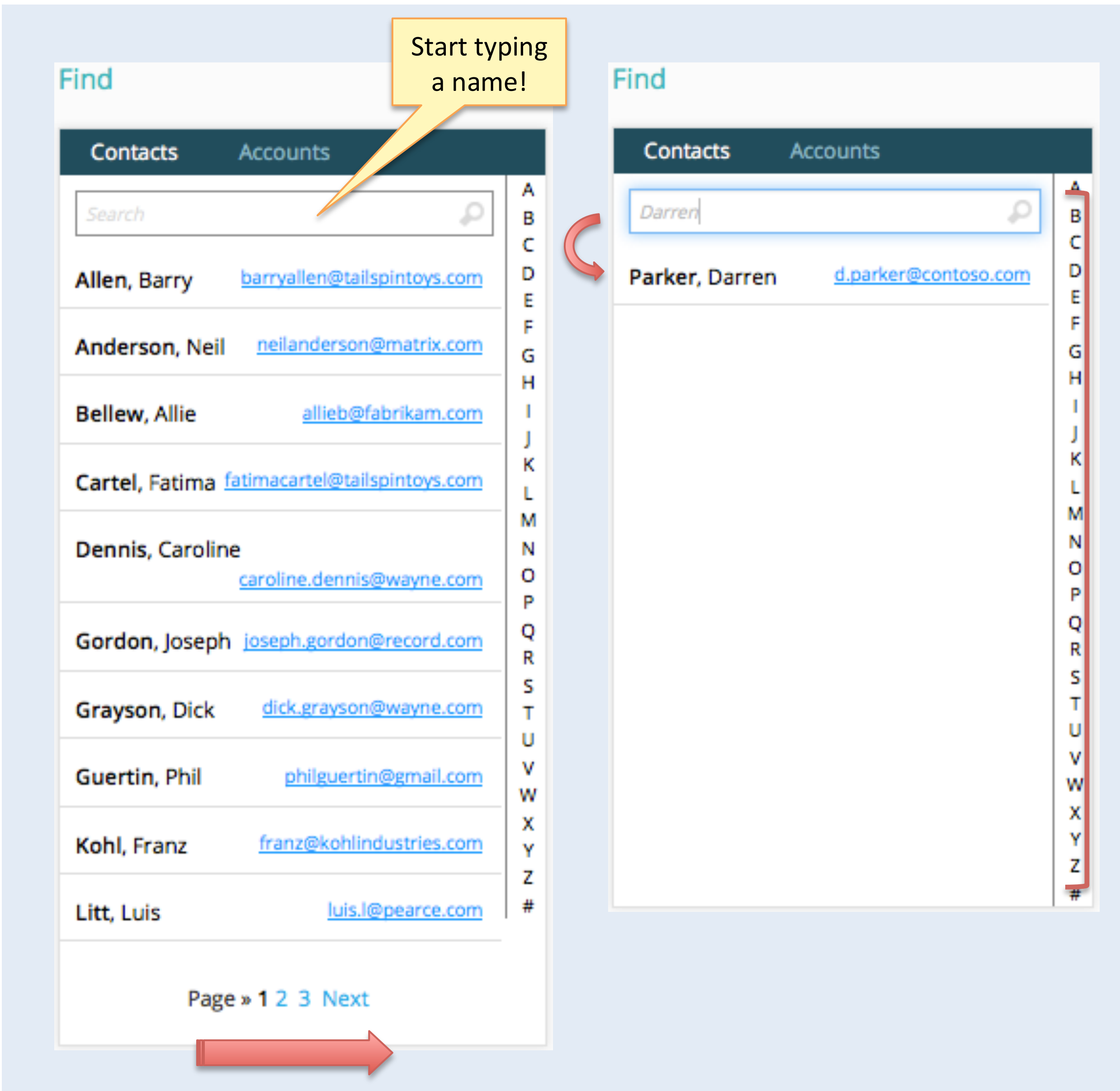
Find Widget

- **Contacts** – quick search of your contacts list from your dashboard.

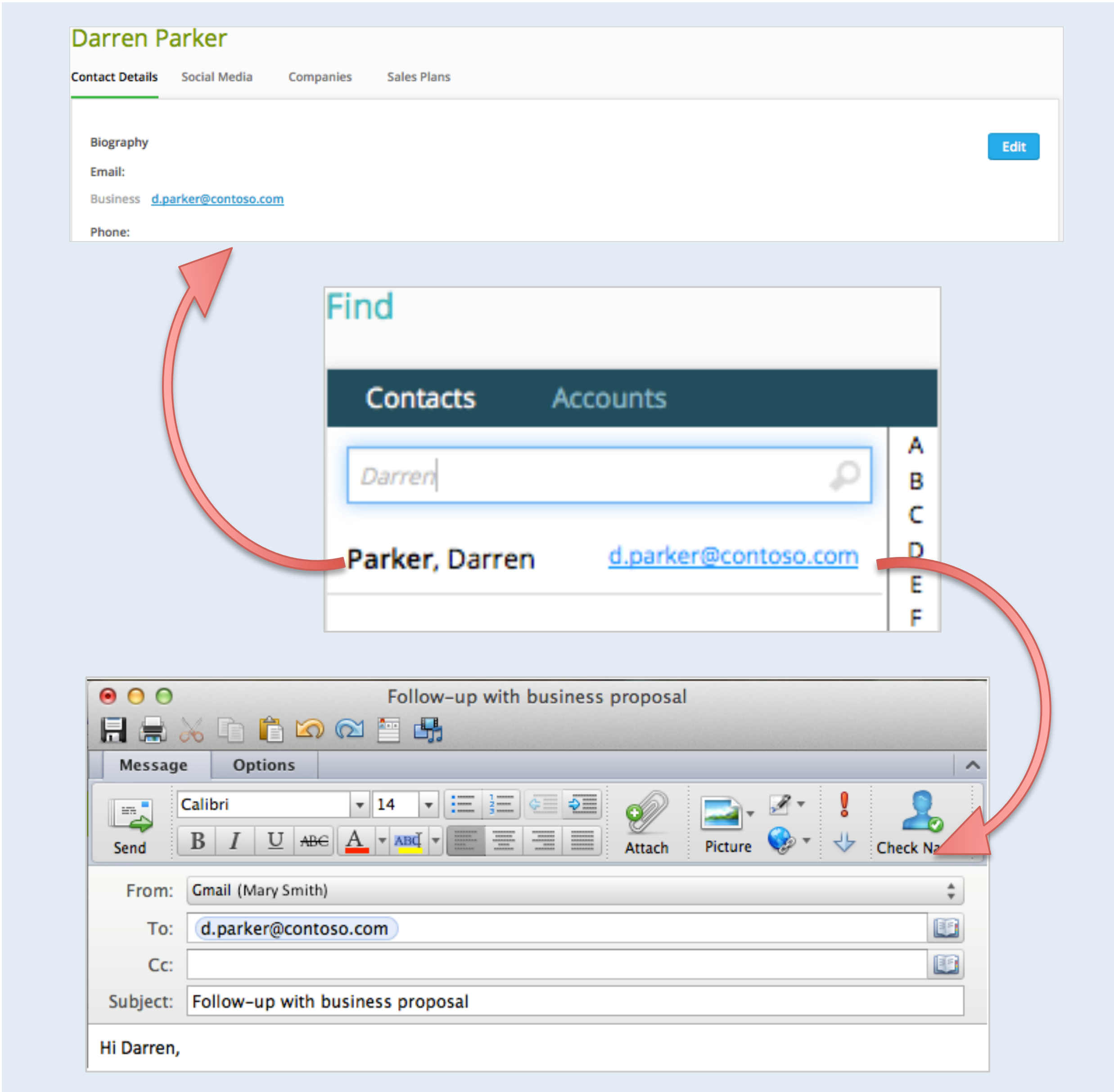
- **Accounts** – quick search of your companies list from your dashboard, including the option to type and search, click through pages, and select by alphabet.

Find Contacts

- Find a contact by typing the name in the search bar, scrolling through the numbered pages at the bottom or selecting a letter from the alphabet bar on the right



- Clicking on the contact's name will open their contact's detail page or clicking their email will directly open your mail client

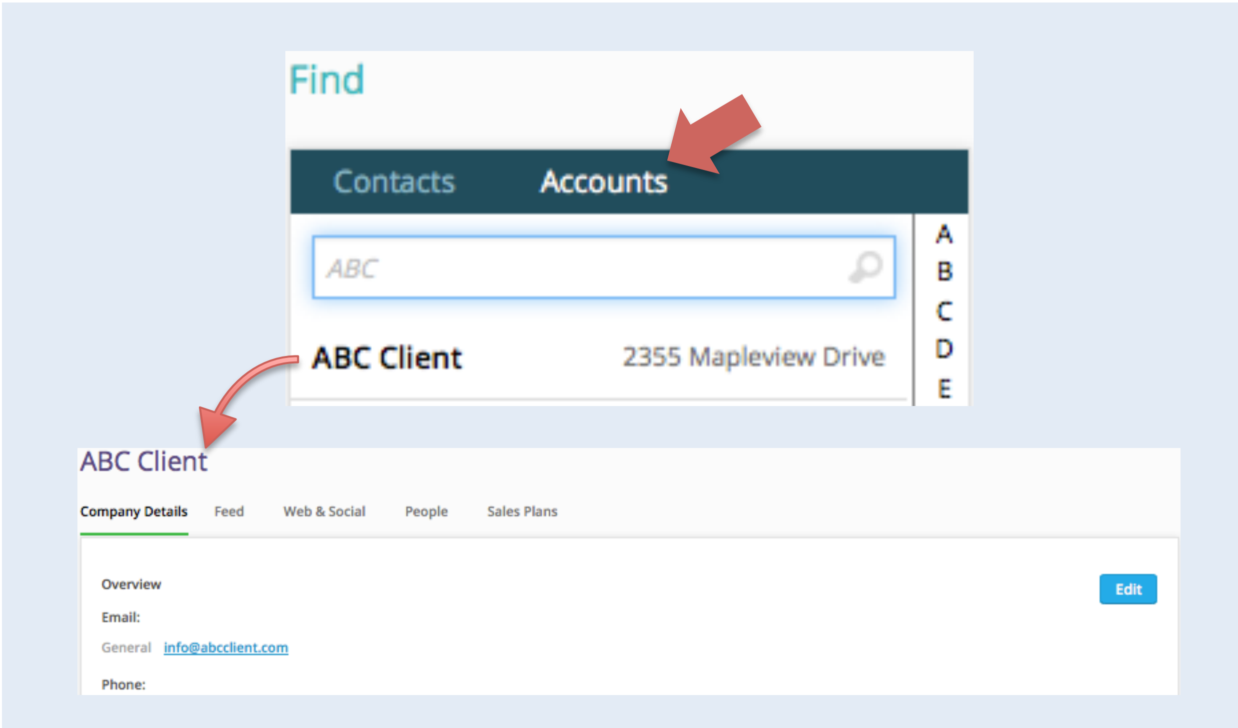


- Click the Accounts tab to switch and search within your list of companies

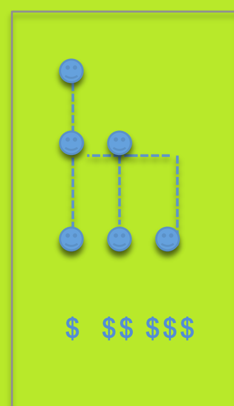
- Find a company by typing their name in the search bar, scrolling through the numbered pages at the bottom or selecting a letter from the alphabet bar on the right

Find Accounts

- Clicking on the Company's name will open the Company details page


Find
Contacts
Accounts
ABC
A
B
C
D
E
ABC Client
2355 Mapleview Drive
ABC Client
Company Details
Feed
Web & Social
People
Sales Plans
Overview
Edit
Email:
General info@abcclient.com
Phone:

Sales Plans

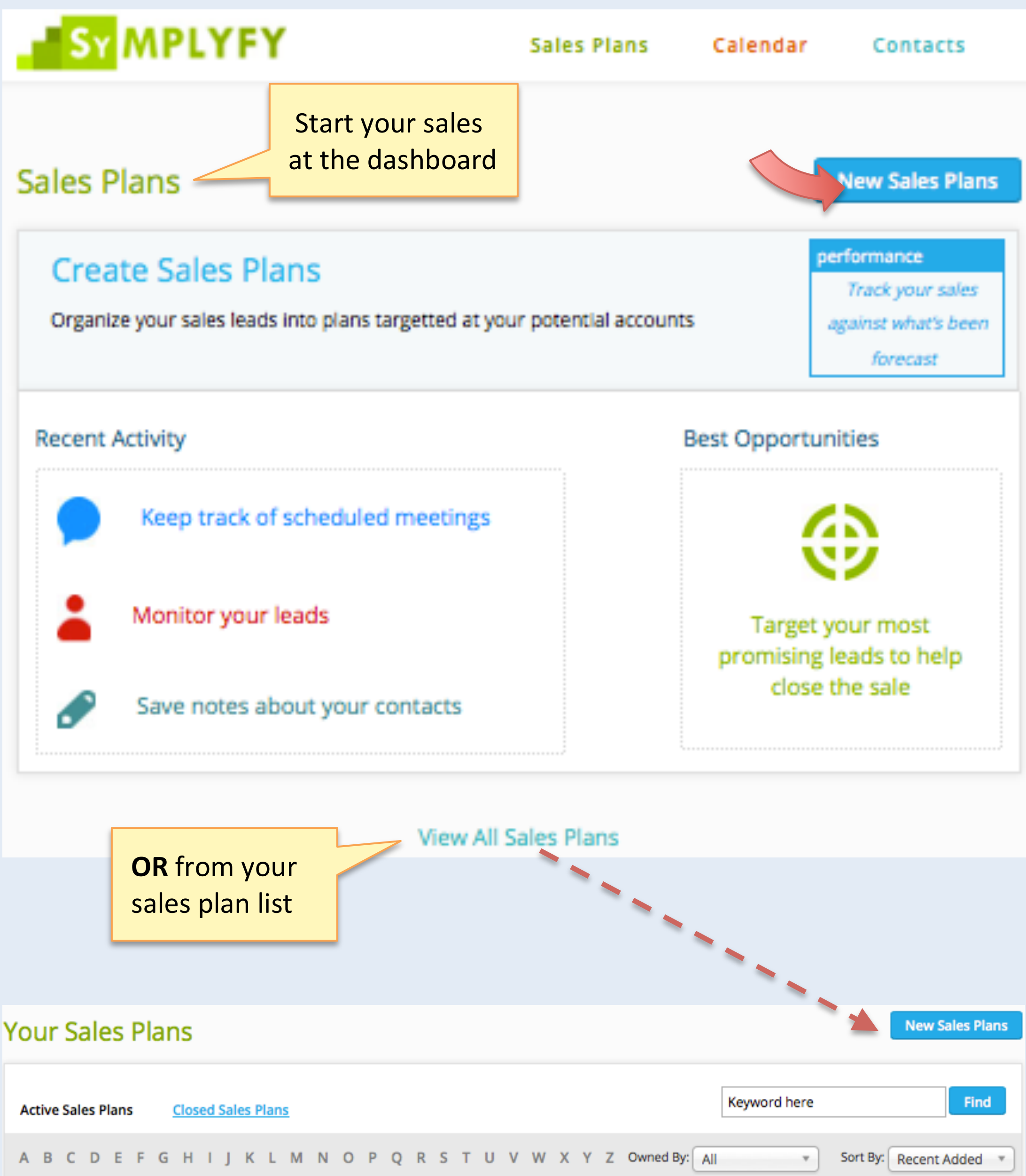


Create a Sales Plan

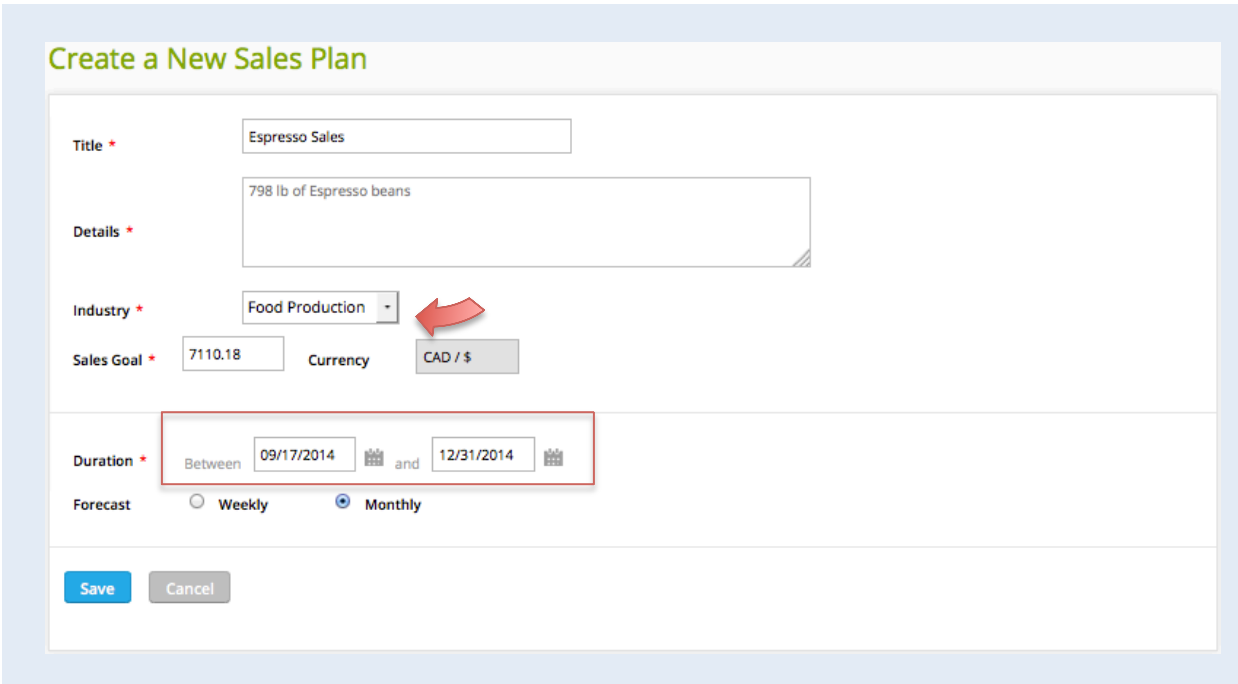
- **Sales Plans** – create, edit and track your sales campaigns and their performance. Keep track of all files, events, people and revenue within the relevant campaign.

New sales plan

- Create a sales plan from your sales plan dashboard or the sales plan list. Click the "New Sales Plans" button.

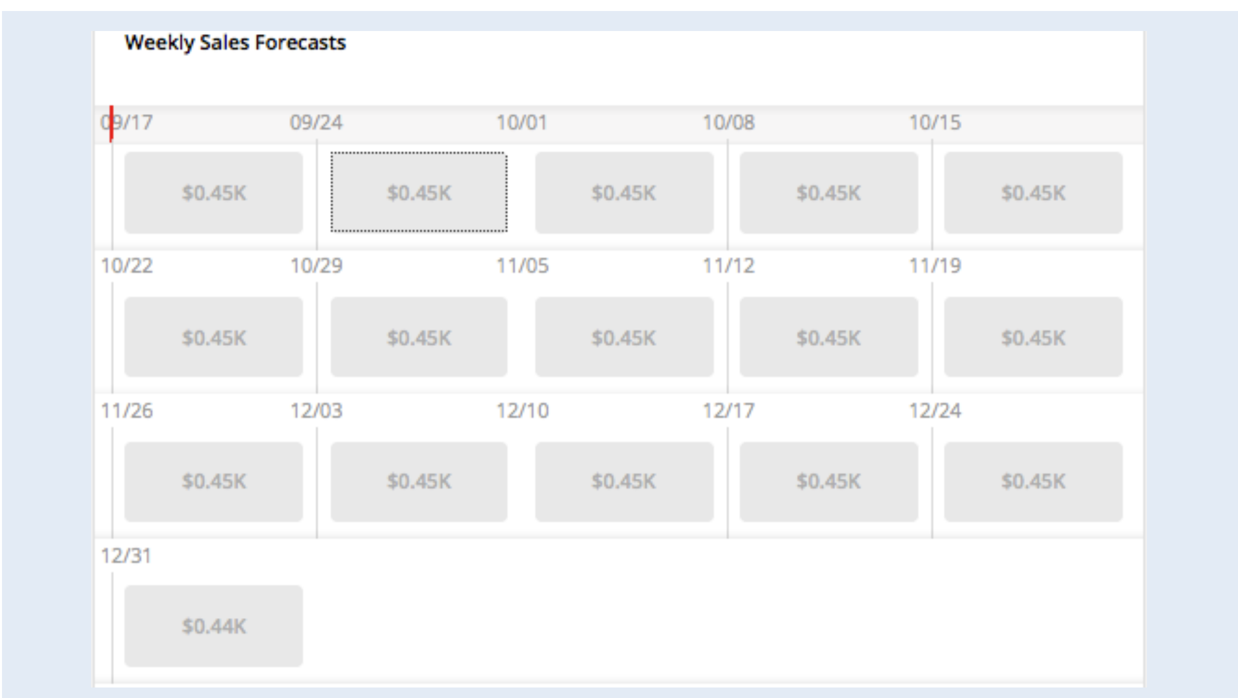


- Fill in all the required fields, select the industry type from the drop-down menu, and set the start and end dates

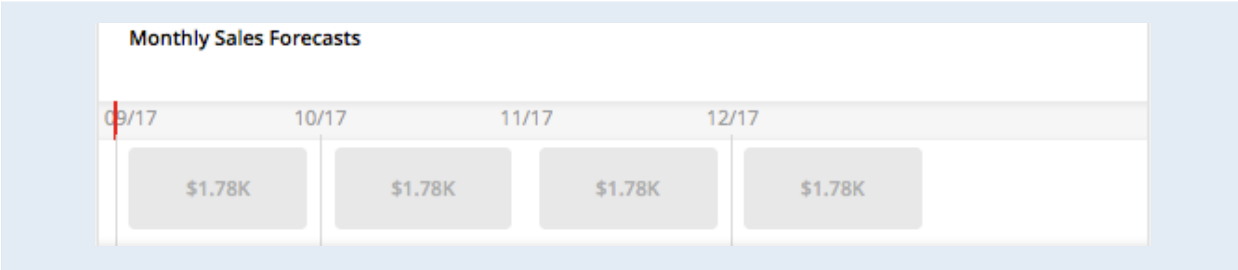


Forecast view

- Choose shorter or longer intervals in your forecast view by selecting weekly or monthly

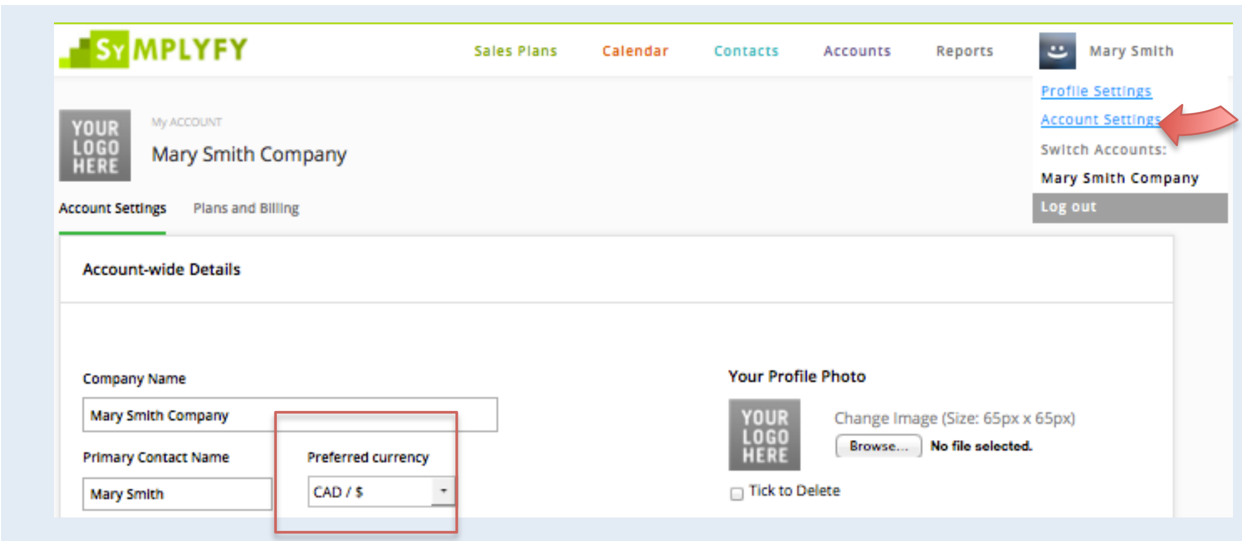


OR



Currency settings

- Account administrators can select the type of currency in Account Settings.

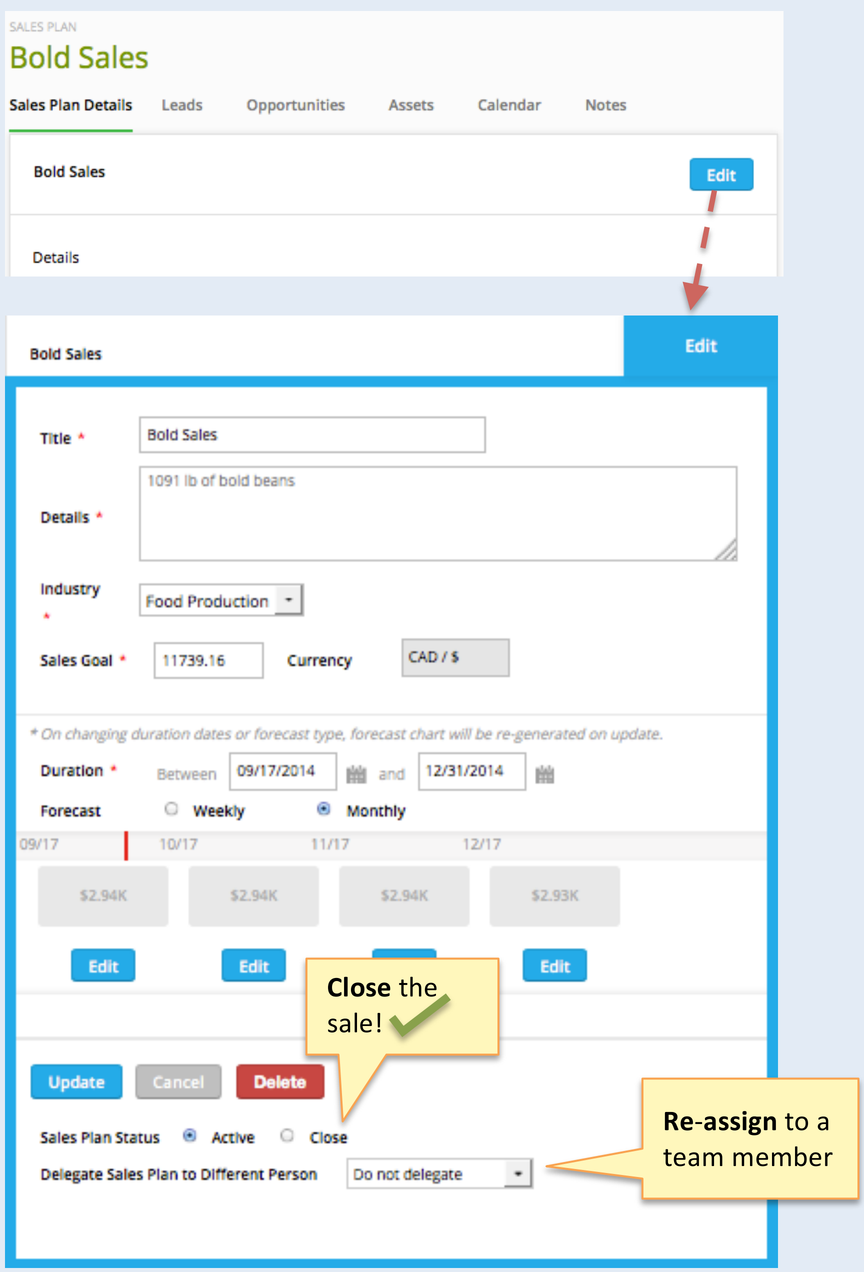


Edit or Delete a Sales Plan

- **Edit** – Update or add new details to the sales plan you just created. Here, you can mark your successful sales campaign as closed or delegate the campaign to another team member when you go away on vacation.
- **Delete** – Remove a sales plan from existence by deleting all its records in one shot

Edit sales plan details

- Edit a sales plan from the Sales Plan Details tab. Click the "edit" button

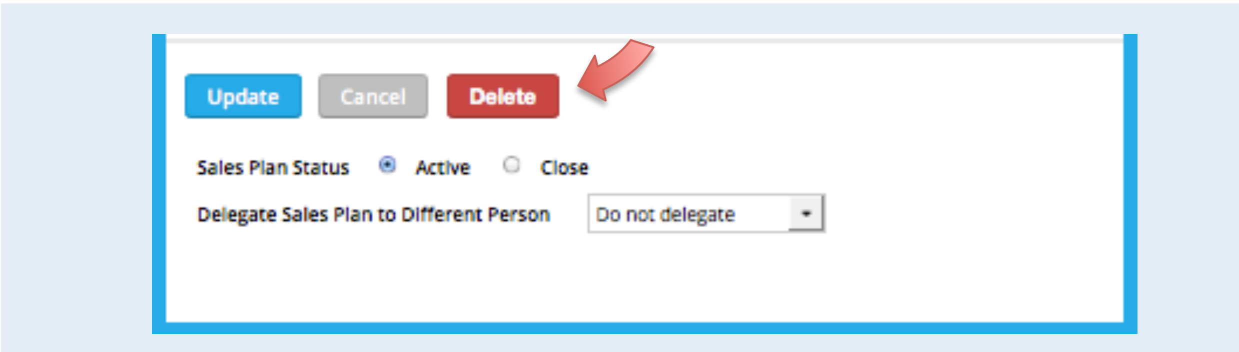


- Mark a sales plan as complete by selecting the status option “close”. Closed sales plans will be moved from your sales plan dashboard (default is active) to the filtered list for “closed sales plans”.

- Choose from the drop-down list of team member names to delegate your sales plan.

Delete a sales plan

- Delete a sales plan from the Sales Plan Details tab. Click the “edit” button
- Click the “Delete” button



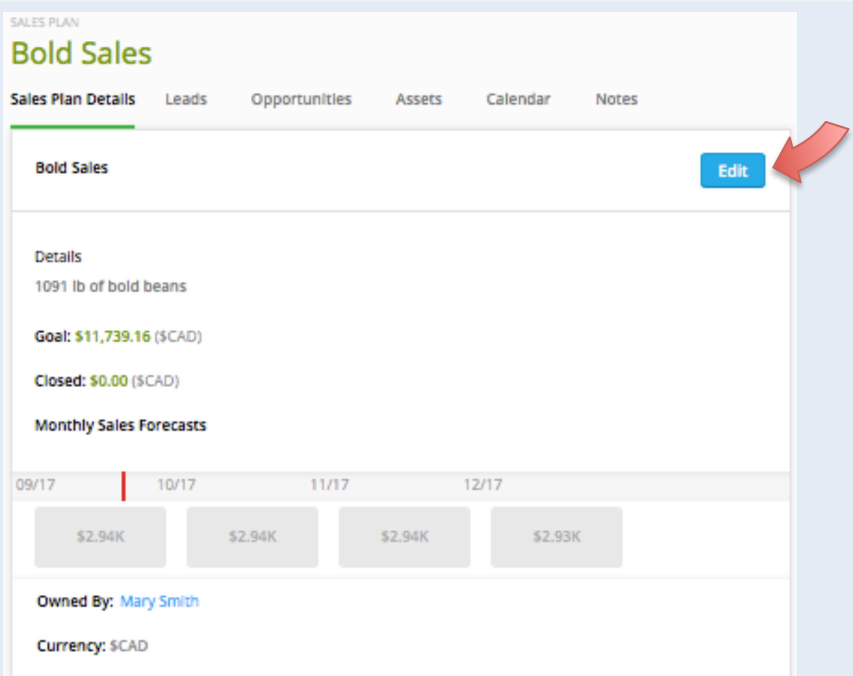
Note: deleted sales plans cannot be recovered, so only the sales plan owner, their sales manager or the Account Administrator can delete a sales plan..

Sales Plan Tabs

- **Sales Plan Details** – read the general information on sales plan you're working on or a team member has started.
- **Leads** – generate potential sales contacts or companies from your social or professional network.
- **Opportunities** – bring your leads into the sales fold by keeping up-to-date and on track with each new opportunity.
- **Assets** – keep all important files and documents in one place, where it will be easy to find and download for your sales manager or CEO when they need it.
- **Events** – keep on top of your campaign's schedule and deadlines by reviewing your dedicated sales plan calendar or your entire company's calendar.
- **Notes** – make a set of quick or detailed notes as you gather more information from your clients or managers.

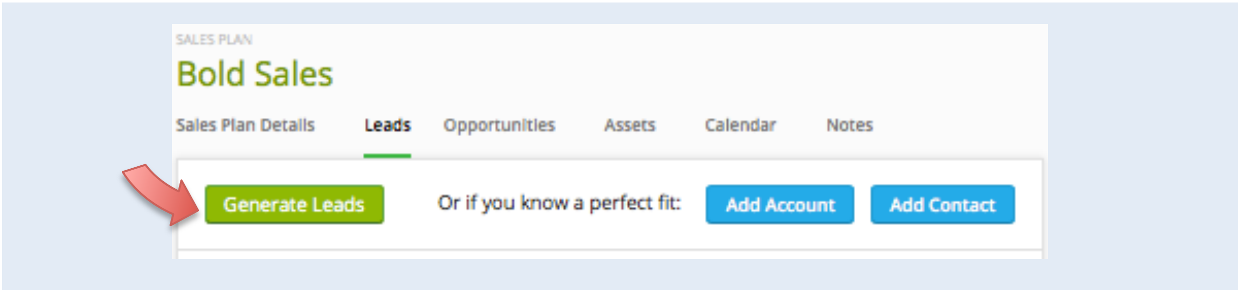
Sales plan details

- View the important details of a sales plan: what it's about, what is the sales goal, how much in sales have you won so far, and how much you'll need to meet every month or every week
- Click the "Edit" button to change these details

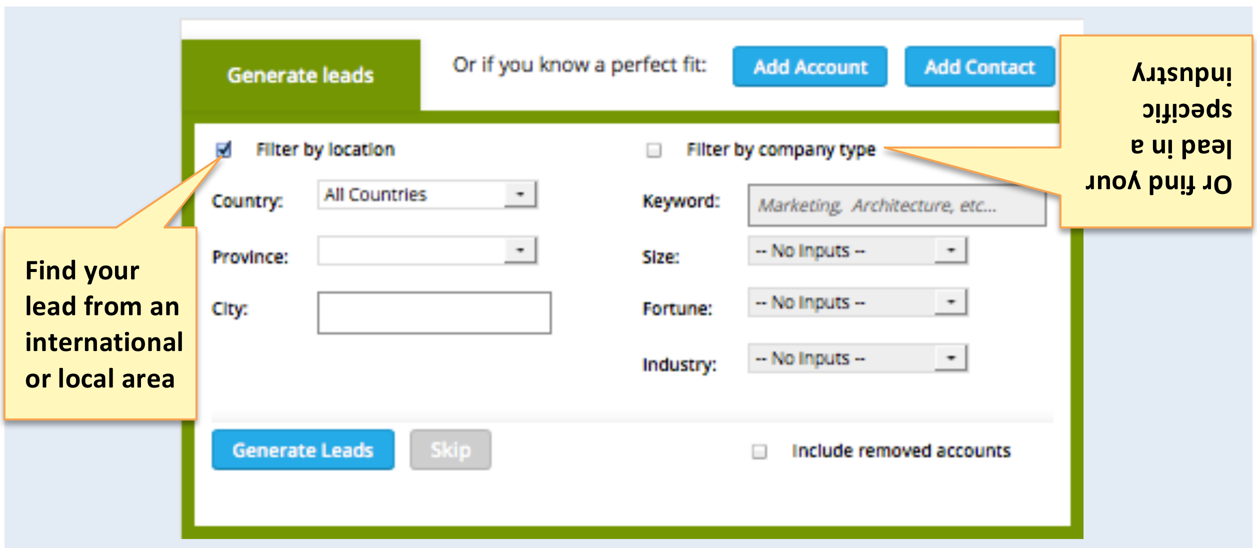


Generate leads

- Use the Symplyfy lead generation tool to find promising prospects.
- Click the “Generate Leads” button to let Symplyfy do the work for you.

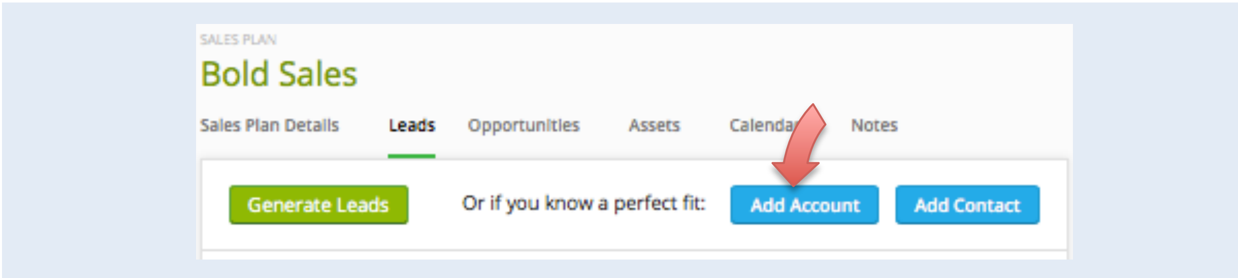


- Use the filter options to narrow your search by location or company type

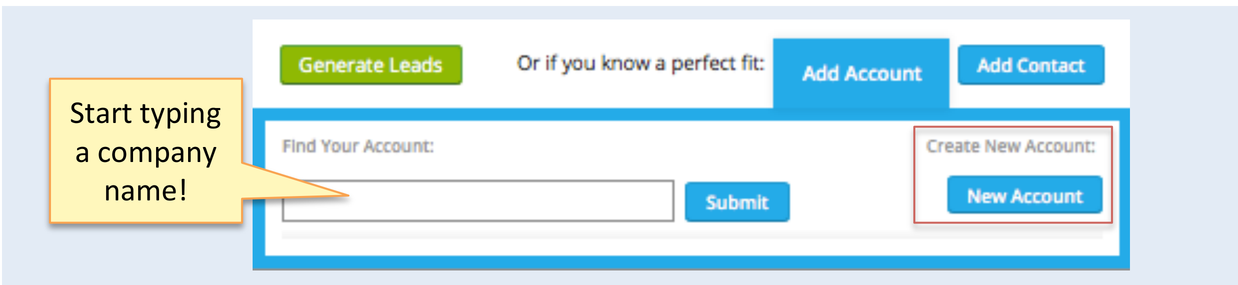


Note: you can find a lead from companies that are no longer in your active list, but you may want to touch base with again. Just check the bottom right box before you search.

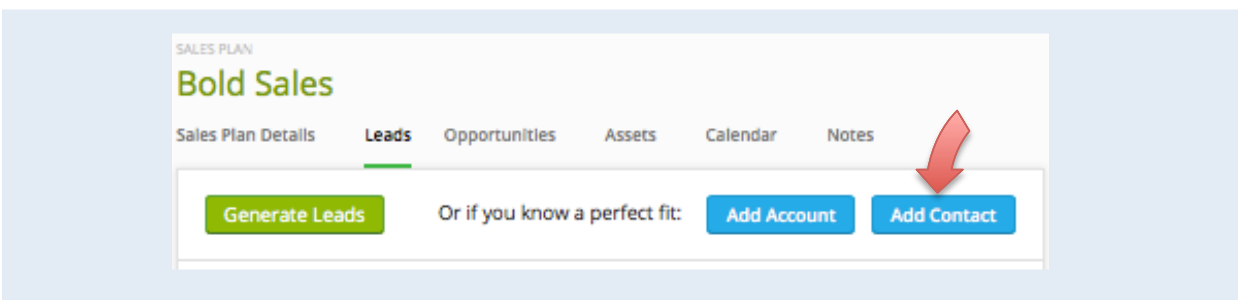
- Or if you already have a company in mind, add them to your leads by searching your accounts list or create a company on the spot. Click the “Add Account” button.



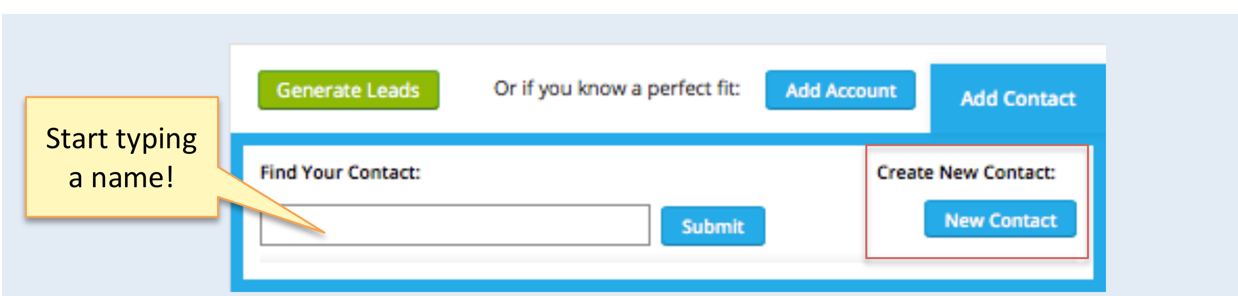
- Type in a company name in the search bar or click “New Account” to fill in a new company form.



- Or if you already have a contact in mind, add them to your leads by searching your contacts list or create a contact on the spot. Click the “Add Contact” button.

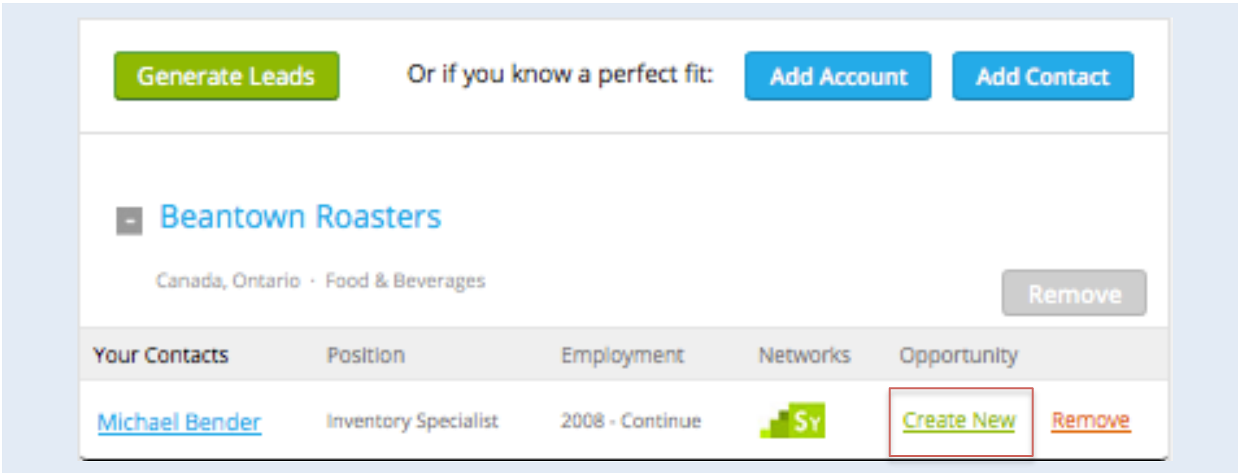


- Type in a contact name in the search bar or click “New Contact” to fill in a new contact form

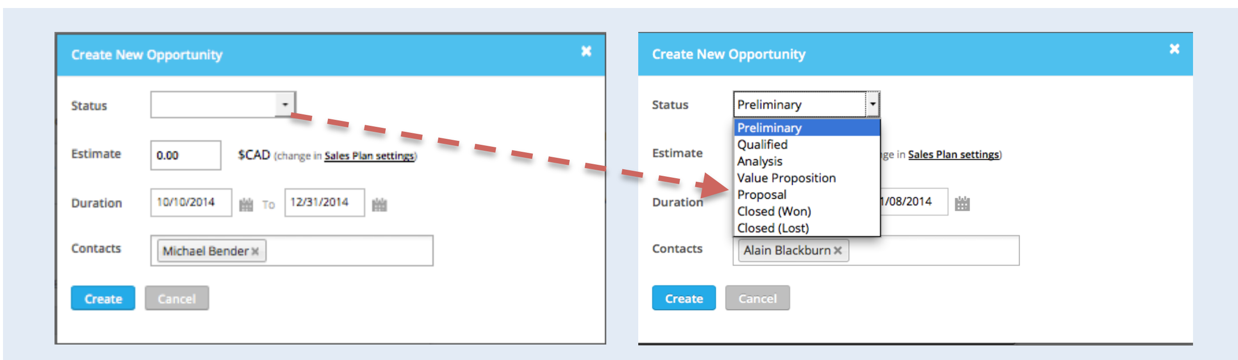


Create opportunities

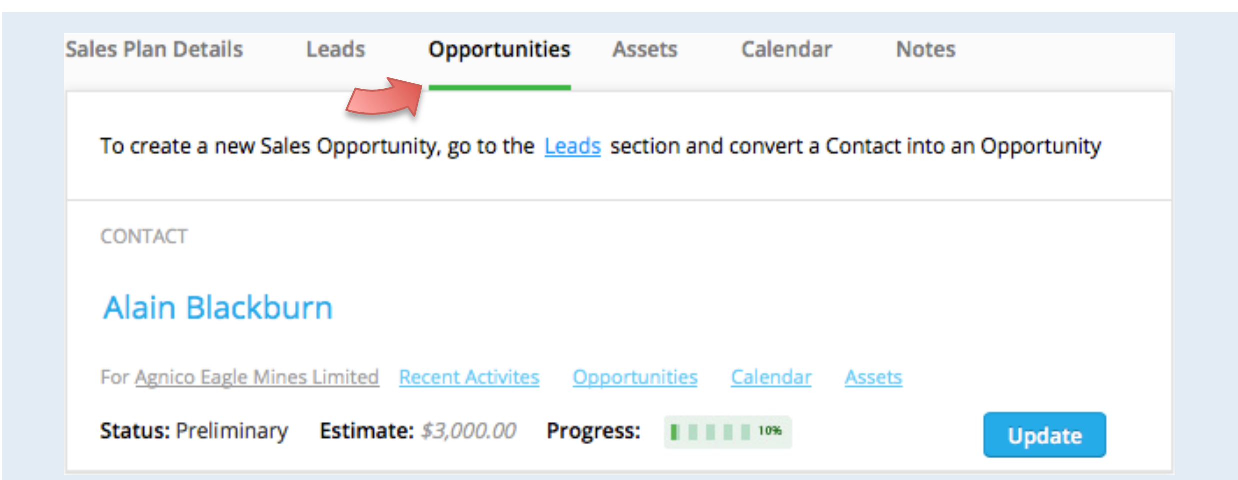
- When you have identified a sales-ready lead, click the link “Create New” beside their name to start the lead transition process.



- A pop-up will appear, where you can fill in the important dates and target sales. Then pick from a drop-down list their status in the sales pipeline.

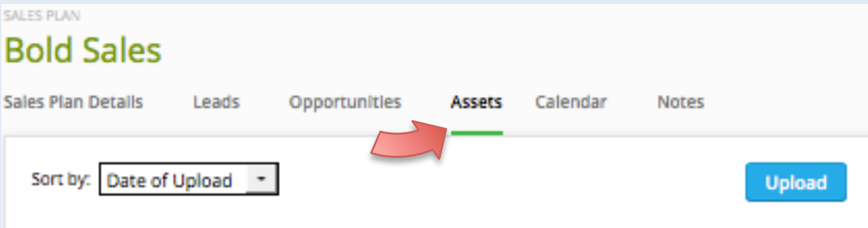


- Find your new opportunities and their progress under the opportunities tab. A click on any of the links will take you directly to any activities connected to that opportunity.

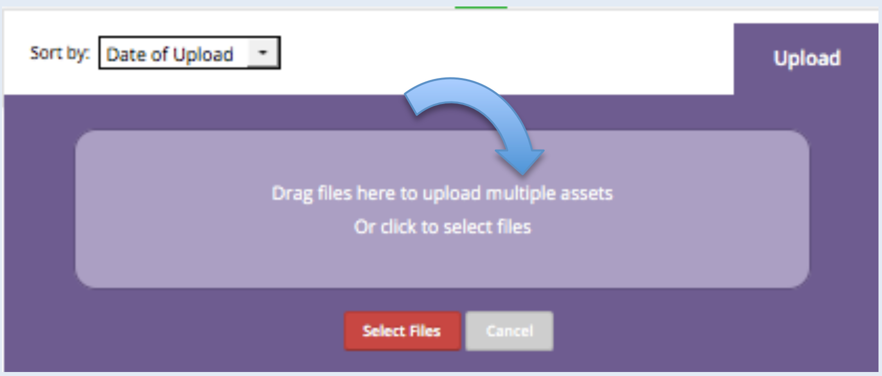


Upload assets

- Click on the assets tab, then click the “upload” button



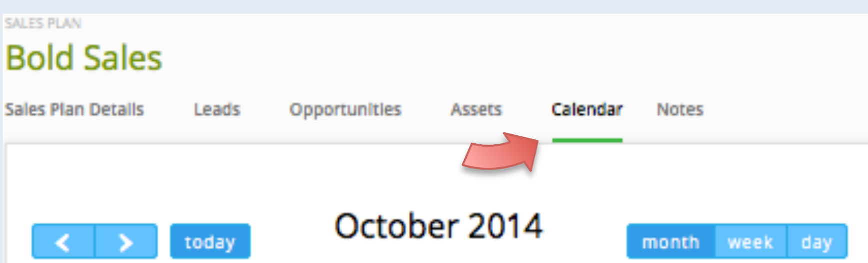
- Upload multiple or single documents and files from your desktop using the drag and drop feature or selecting them from your file window



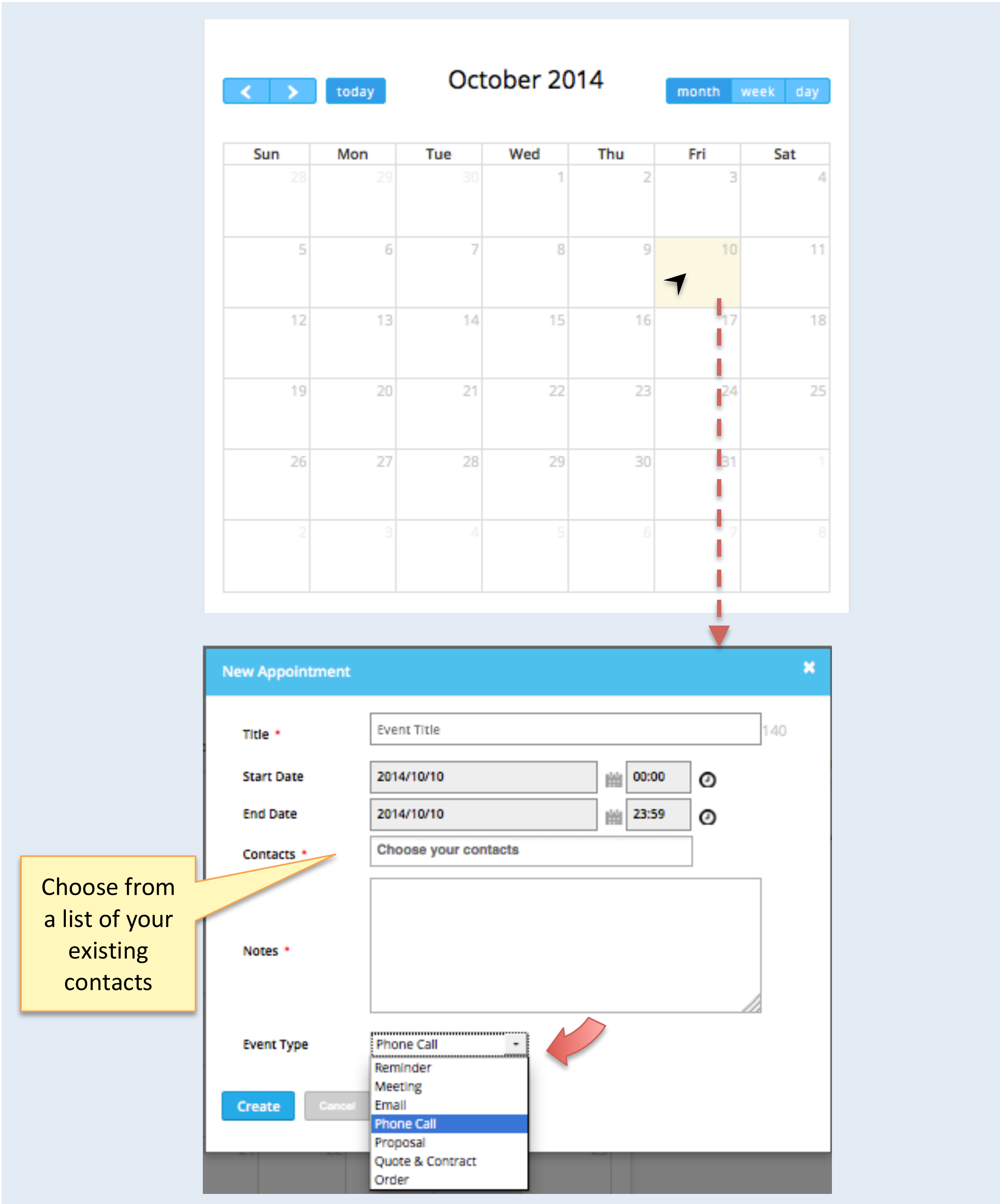
Note: you can upload files in any format (.pdf, .doc, .xls, .ppt, .jpeg, etc.), which will have icons beside the filename to indicate their format type. You can also sort your file list by type (date of upload is the default sort).

Schedule an event

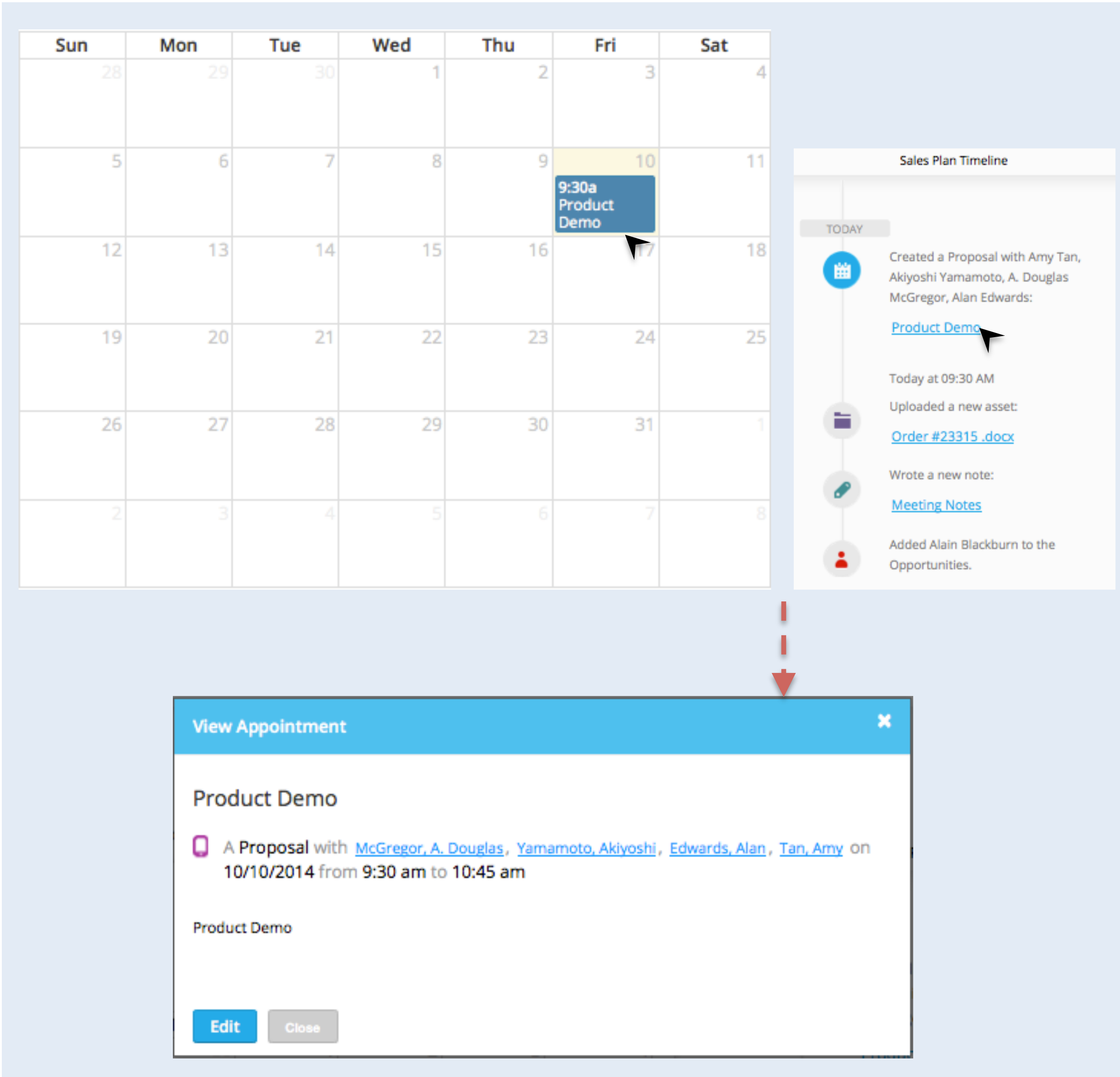
- Create an event for a specific sales plan by clicking on the Calendar tab



Views: change your calendar view from month, to week, to day depending on your busy schedule. Navigate back to today’s date by click the button “Today”.

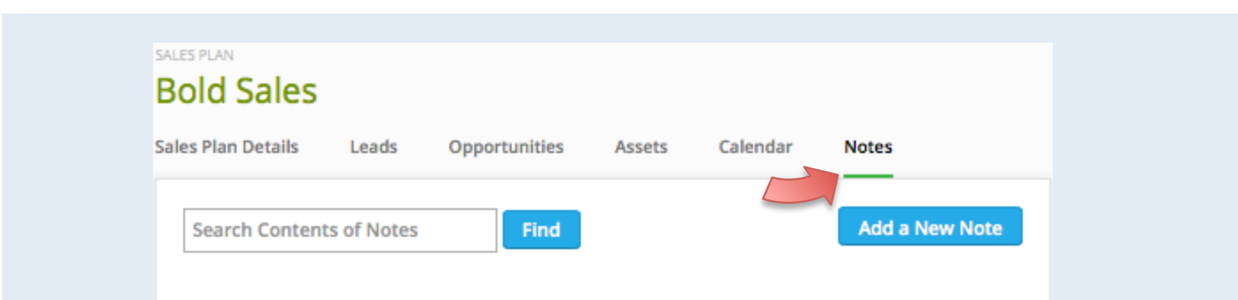


- Choose from a drop-down list of your contacts to link to the event, specify the type of event taking place and add a few notes to remember
- Edit or view an event by clicking on it directly in the calendar or timeline



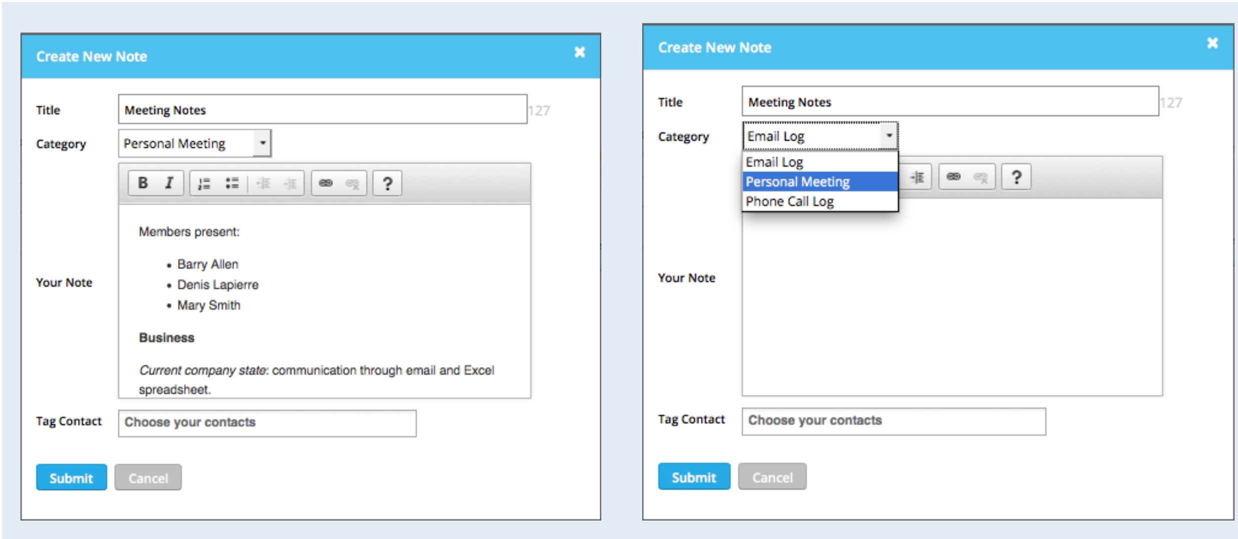
Take notes

- Click on the Notes tab, then “Add a New Note” button



- A pop-up will appear to start typing in your notes

- Specify what kind of note you are creating from the drop-down



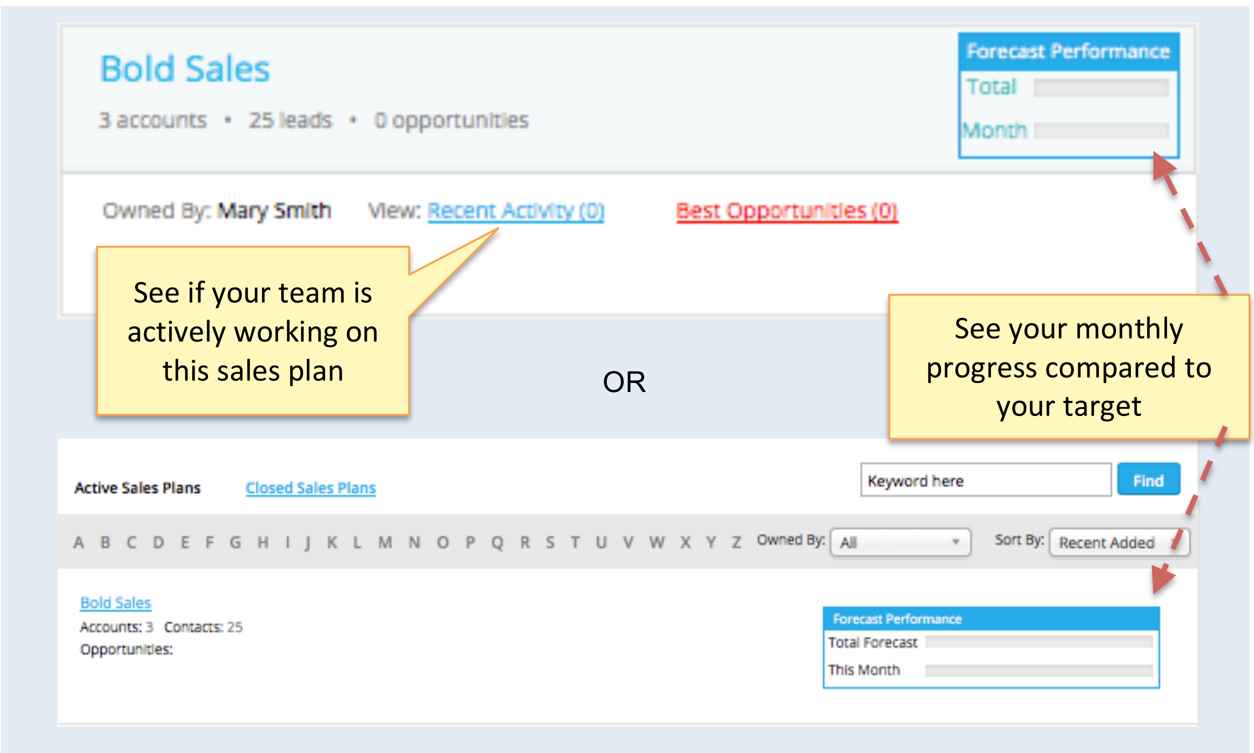
Tip: Keep this tab open to document each call or contact with a company or client quickly before you forget.

Sales Plan Overview

- **Sales Plan Dashboard** – a snippet of all the essential information related to a sales plan from your dashboard. Know who created the sales plan, the number of companies, leads, and opportunities attached to the campaign, if there has been any recent activity, or what is the general outlook for your campaign's success – all from a glance.
- **Sales Plan Timeline** – a convenient look at all your activity over time for a particular sales plan. The timeline bar is always in your peripheral view as you navigate through the sales plan modules.

Sales plan dashboard

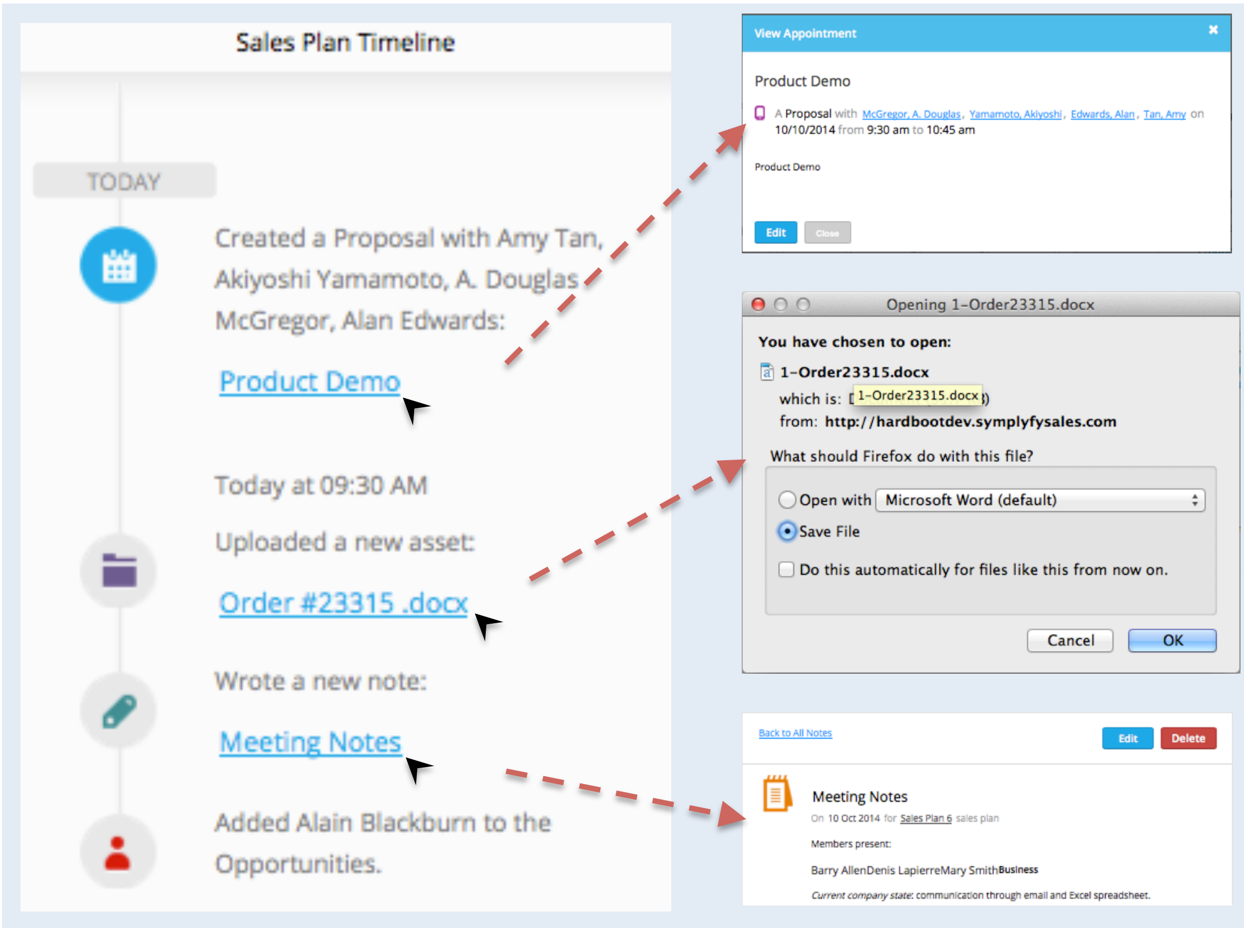
- Get a snapshot of the activities and progress of your team's or company's sales plans from the dashboard or the Sales Plan tab
- Includes some quick data on each sales plan: number of companies, leads, opportunities, and recent activity



Sales plan timeline

- Every activity (uploaded note, added contact, scheduled event, etc.) is recorded with intuitive icons beside every sales plan

- Click directly on an activity to open the specific pop-up or download the file



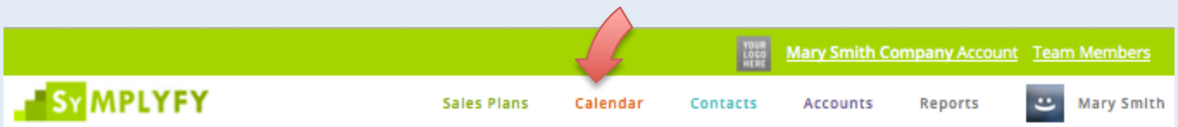
Calendar

Calendar

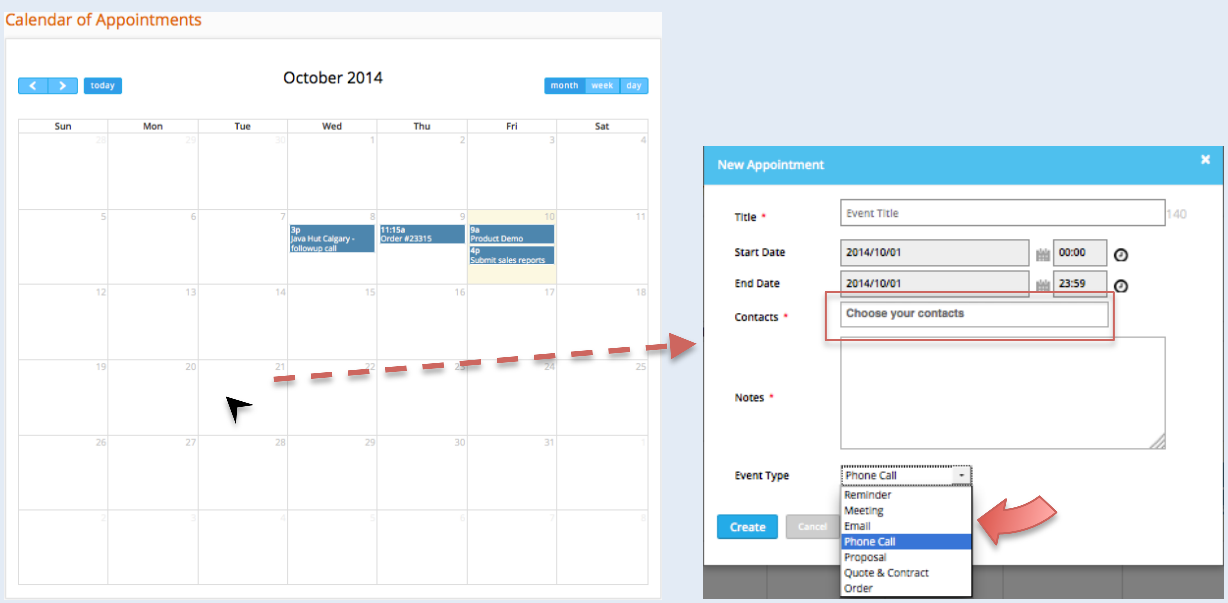
- **Account Calendar** – an account-wide calendar that includes general events for the entire company and each event linked to a sales plan.
- **Sales Plan Calendar** – events can be linked and created directly within a sales plan.

Create an event

- Click on the Calendar tab



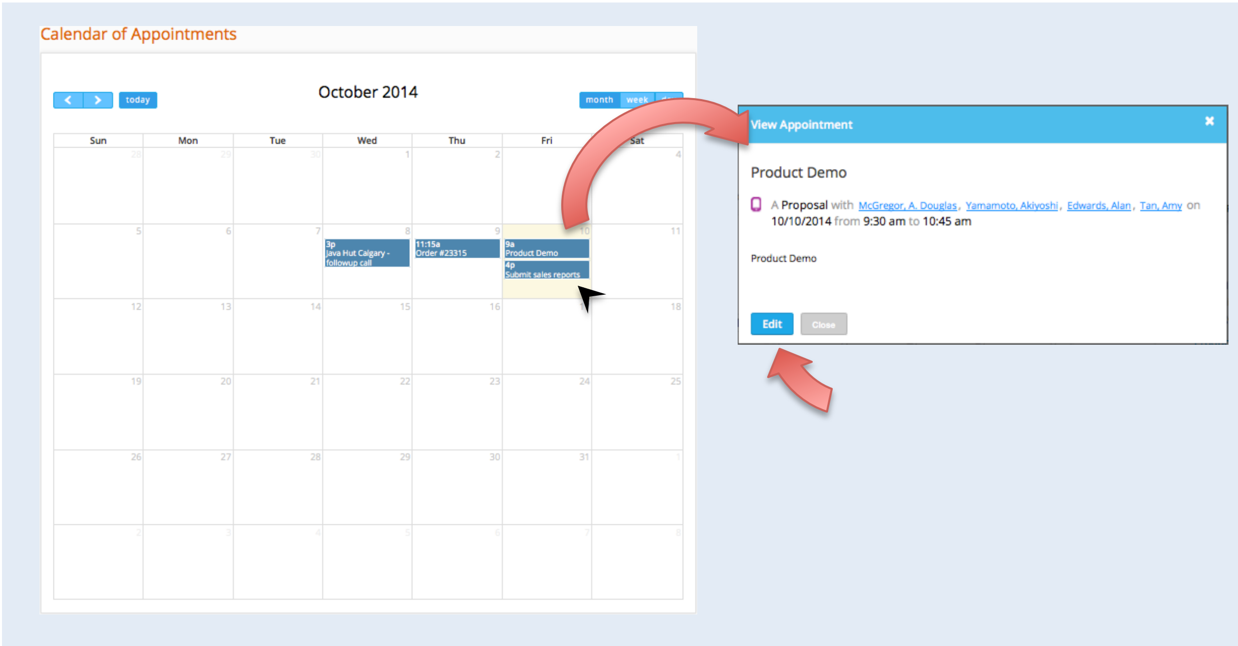
- Click on any day in the calendar to open up the event form



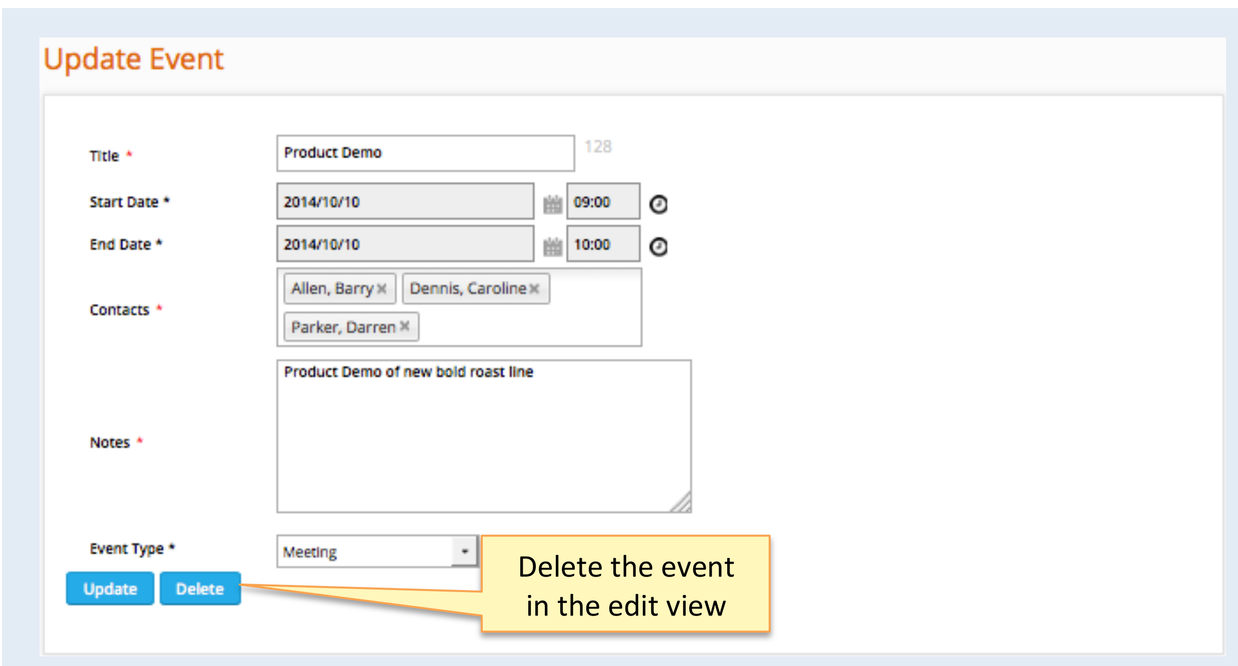
- Choose the relevant contact associated with this event and the type of event from a drop-down list

Edit or delete an event

- Open the event details by clicking on the event in the calendar

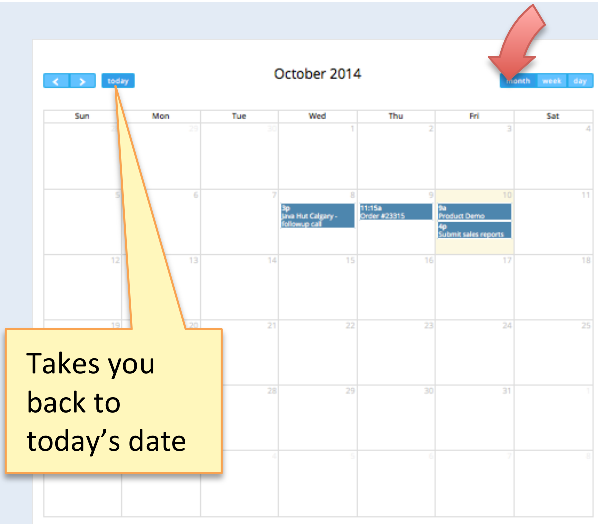


- Click the “Edit” button to change the event information or to delete the event

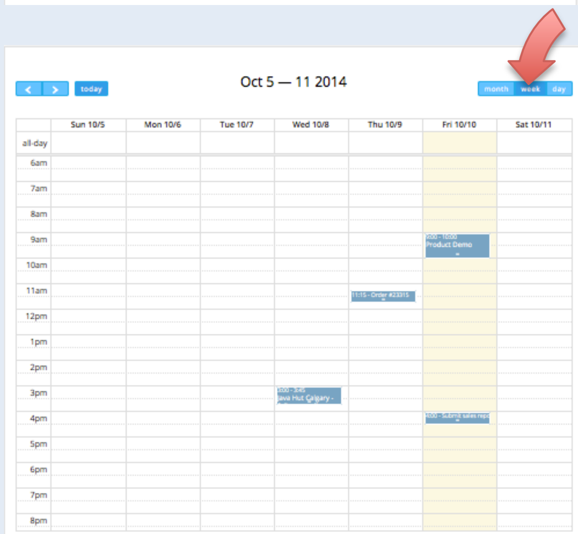


Switch calendar views

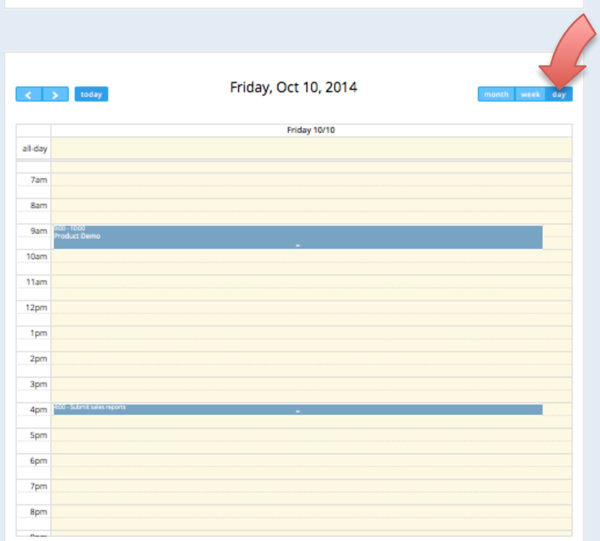
- Toggle the month (default), week, day buttons to change your calendar view
- The Today button will bring you back to today's date if you are not already on it



Month View



Week View



Day View

Contacts

Accounts

Reports

CONTACTS

- Create a new contact
- Upload contacts
- Delete a contact
- Archive a contact
- Contact details
- Link your contact's social media accounts
- Add the companies they work for
- View the sales plans they're in
- Contacts activity view

ACCOUNTS

- Create a new company
- Upload company
- Delete a company
- Archive a company
- Company details
- Read the company's news feeds
- Link the company's social media accounts
- Add contacts that work for them
- View the sales plans related to them

REPORTS

- What's on your dashboard
- Overview of your sales plans
- Lead generation to sales opportunities
- Activity timeline of your sales team
- A closer look at your companies
- Sales People widget
- Team Schedule & Activity widget
- Print and export reports