



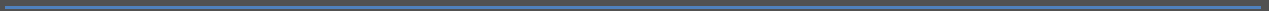
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Profile

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

YOUR LOGO HERE Mary Smith Company Account Team Members

SYMPPLYFY Sales Plans Calendar Contacts Accounts Reports Mary Smith

Profile Settings Account Settings

Switch Accounts: Mary Smith Company Log out

Personal Details

First Name *	Last Name *
Mary	Smith
Country *	Street Address *
Canada	
City/Town *	Postal Code *
Phone	Position
Email Address *	
marysmith@gmail.com	

* Leave passwords field blank if you don't want to update your password.

Password	Confirm Password

Profile Photo

Browse... No file selected.

Permission Level: Administrator

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

Notification Settings

☐ Notify me by email 1 hour before a scheduled appointment

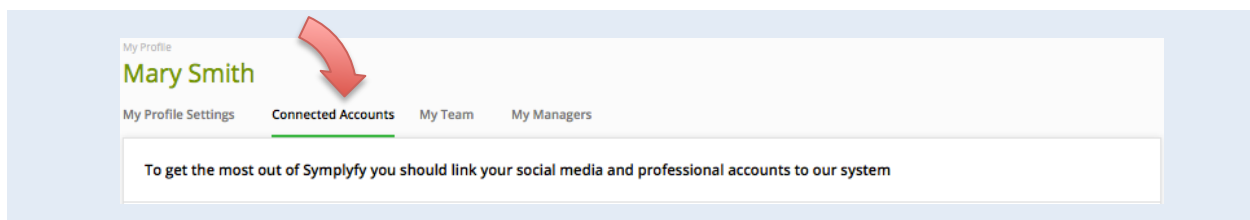
☐ Notify me when one of my team members closes a deal

Save Changes

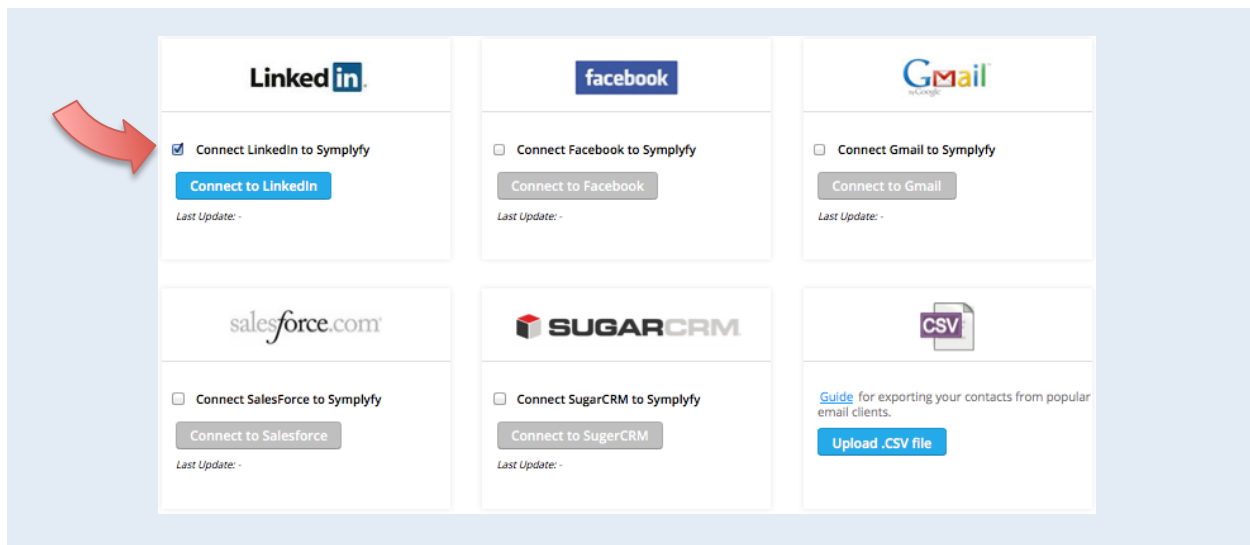
Link Your Accounts

- **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

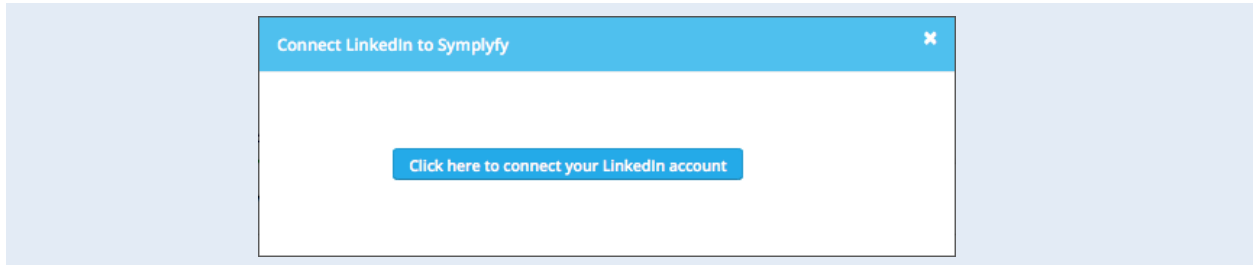


- Select the checkbox beside the account you want to link. This will enable the “Connect to ...” button.

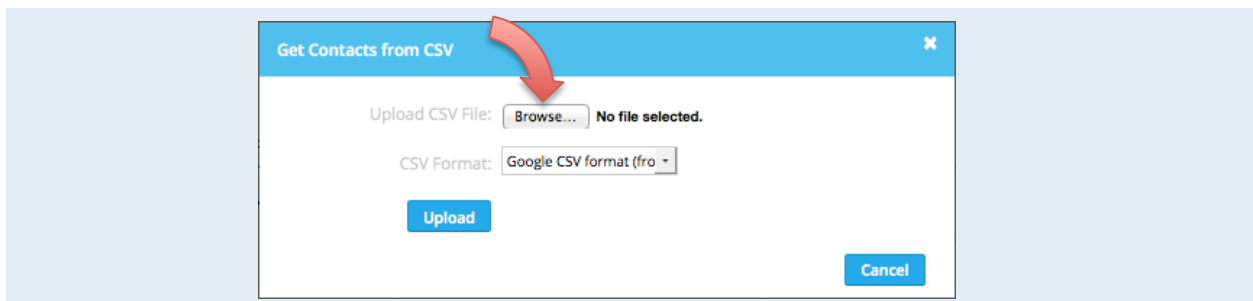


Note: only one user login can be associated with each account, i.e. once an account is linked, the user cannot add a second account.

- 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.



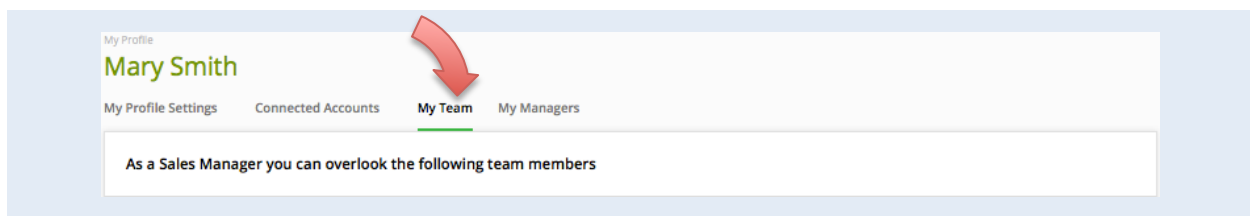
Double-check that your .csv file includes all required fields. For a guide on how to upload .csv files to Symplyfy, click on the “guide” link above the upload button.

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.

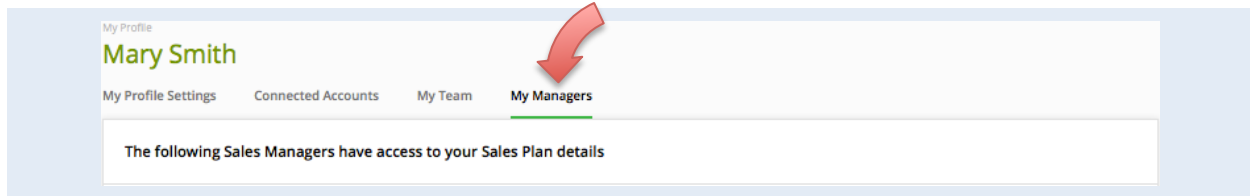
Team members

- Click the My Team tab

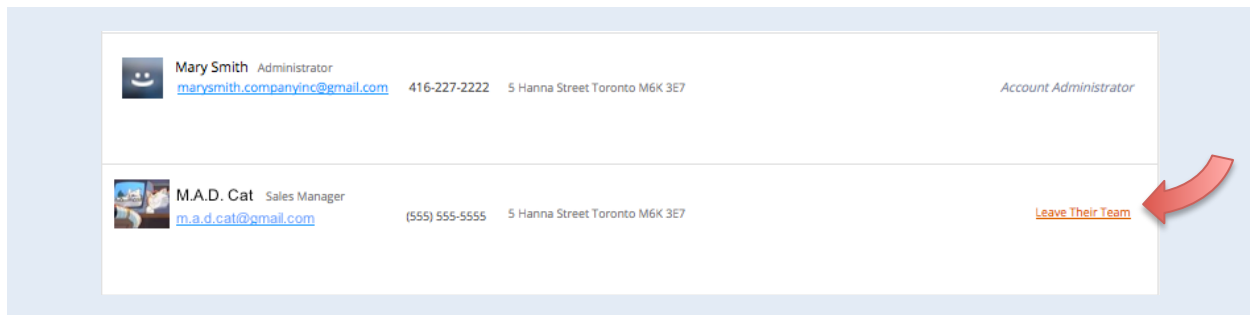


Sales managers

- Click the My Managers tab



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

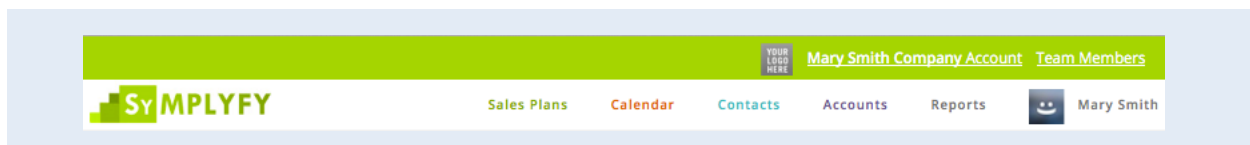


Your Permissions

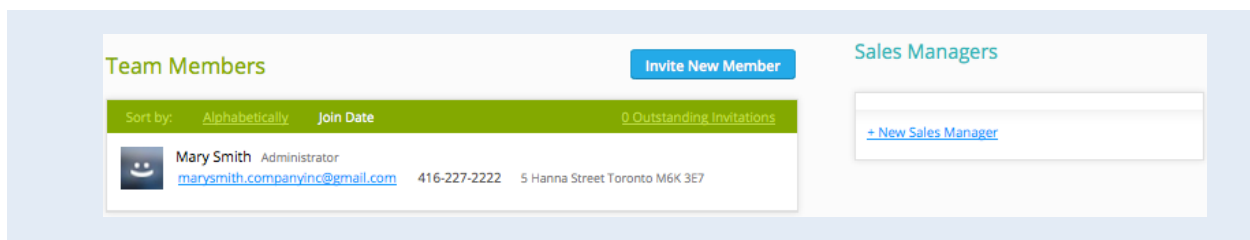
- **Administrator** – access to all account activities (sales plans, contacts, companies, team members)
- **Sales Manager** – views all account activities, with only access to their own and their team's sales plans
- **Sales Person** – views all account activities, with only access to their own sales 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

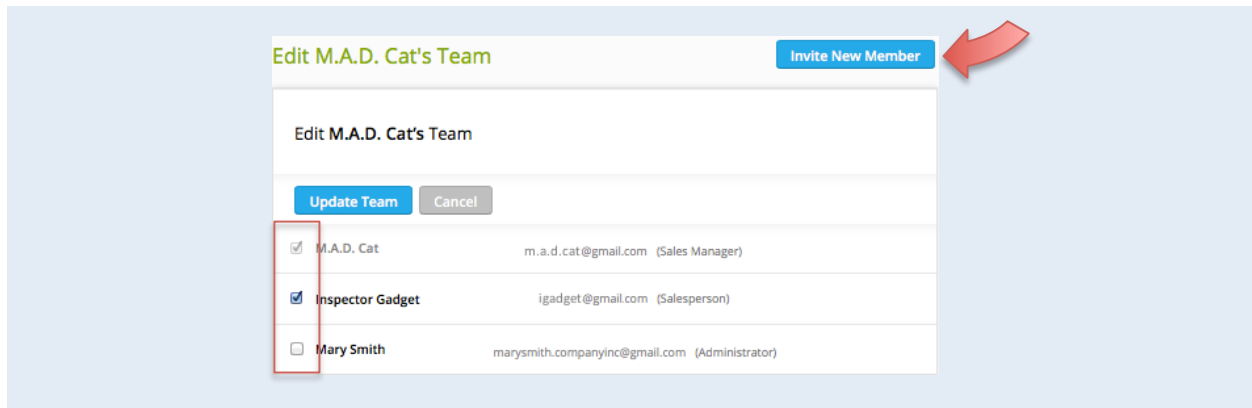


- Type in your team member's email and select their role to control their level of access to activities on the account. Click Invite and an invitation to register will be sent to their email.

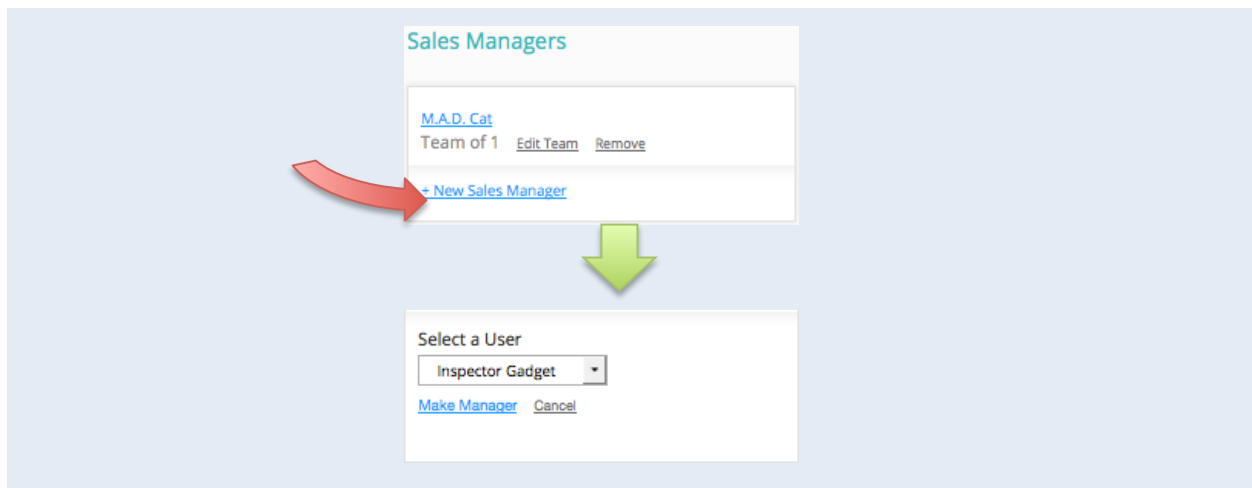
- Organize your members into teams, by clicking the Edit Team link under your designated Sales Manager's name

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.

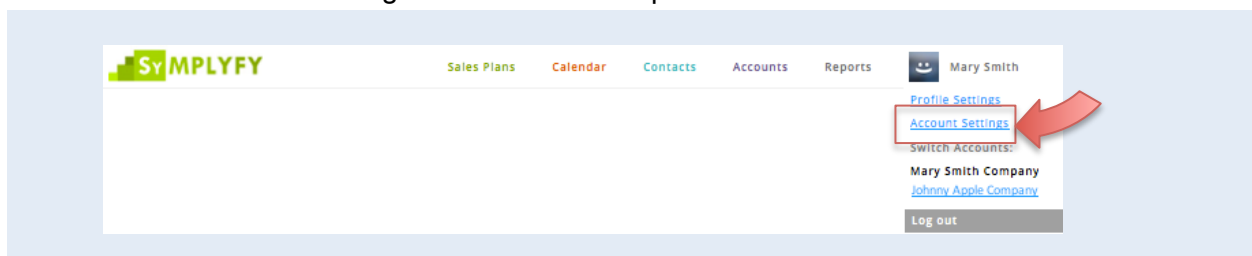


Your Account(s)

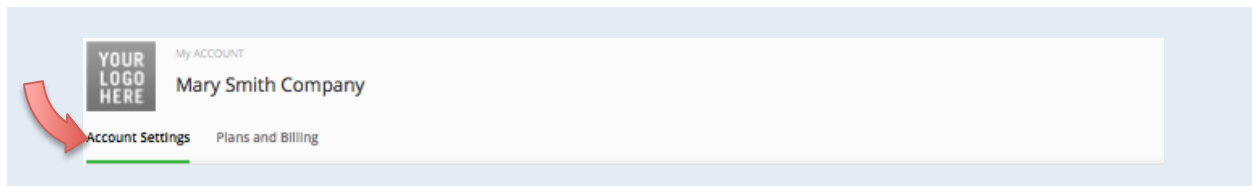
- **Account Settings** – View or change your account information, including name, logo and currency or billing information, including usage data, plan and upgrades.
- **Switch Accounts** – If you have multiple accounts, switch between the different accounts by using the main drop-down menu.

Account Settings

- Select Account Settings from the main drop-down menu



- Click on the Account Settings Tab

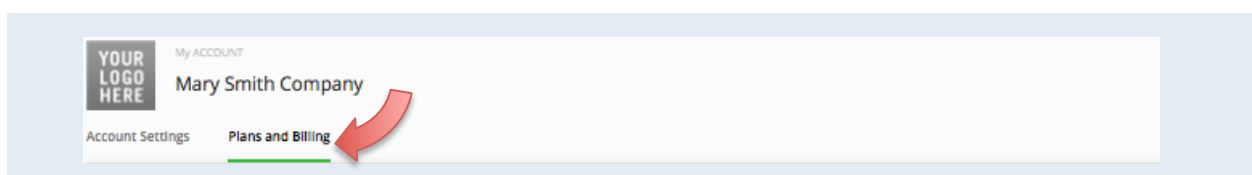


- Changes made here will affect all user IDs associated with this account

A screenshot of the 'Account-wide Details' form. The form is divided into two columns. The left column contains input fields for 'Company Name' (filled with 'Mary Smith Company'), 'Primary Contact Name' (filled with 'Mary Smith'), 'Contact Phone Number', 'Facebook Profile URL', and 'LinkedIn Profile URL'. The right column contains a 'Preferred currency' dropdown (set to 'CAD / \$'), a 'Contact Email' field (filled with 'marysmith.companyinc@gr'), and a 'Twitter Profile URL' field. To the right of these fields is a 'Your Profile Photo' section with a logo placeholder, a 'Change Image (Size: 65px x 65px)' button, a 'Browse...' button, and the text 'No file selected.' Below this is a checkbox labeled 'Tick to Delete'. At the bottom left of the form is a blue 'Save Changes' button.

Plans and Billing

- Click on the Plans and Billings Tab



- Track your company's usage

A screenshot of the 'Your current usage data' section. It displays three lines of usage information: 'Leads: 0' in green, 'Contacts: 0' in blue, and 'Storage:' in purple. The section is enclosed in a light gray border.

- 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


Sales Plans
Calendar
Contacts
Accounts
Reports


Mary Smith

[Profile Settings](#)
[Account Settings](#)

Switch Accounts:


Mary Smith Company

Johnny Apple Company

[Log out](#)

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

Dashboard Widgets

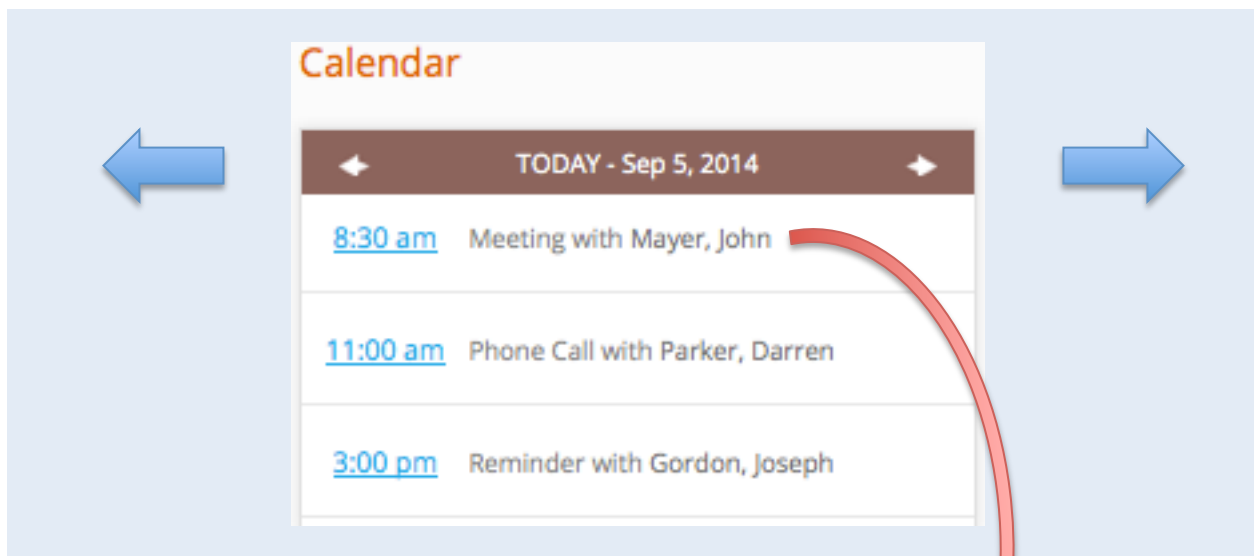


Calendar Widget

- **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.

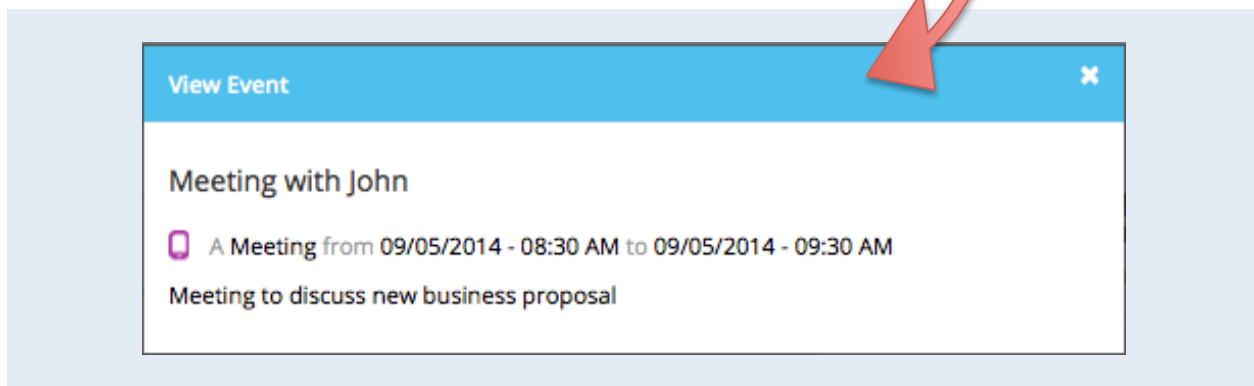
Daily calendar

- 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

The image shows two screenshots of a web application's 'Find' interface. The left screenshot displays a list of contacts under the 'Contacts' tab. A yellow callout bubble points to the search bar with the text 'Start typing a name!'. The right screenshot shows the search results for 'Darren', displaying 'Parker, Darren' with his email address. A red arrow points from the search bar in the left screenshot to the search bar in the right screenshot. A red arrow also points from the bottom of the left screenshot to the bottom of the right screenshot, indicating the transition between the two states.

Find

Contacts **Accounts**

Search

Allen, Barry barryallen@tailspintoys.com

Anderson, Neil neilanderson@matrix.com

Bellew, Allie allieb@fabrikam.com

Cartel, Fatima fatimacartel@tailspintoys.com

Dennis, Caroline caroline.dennis@wayne.com

Gordon, Joseph joseph.gordon@record.com

Grayson, Dick dick.grayson@wayne.com

Guertin, Phil philguertin@gmail.com

Kohl, Franz franz@kohlindustries.com

Litt, Luis luis.l@pearce.com

Page » 1 2 3 Next

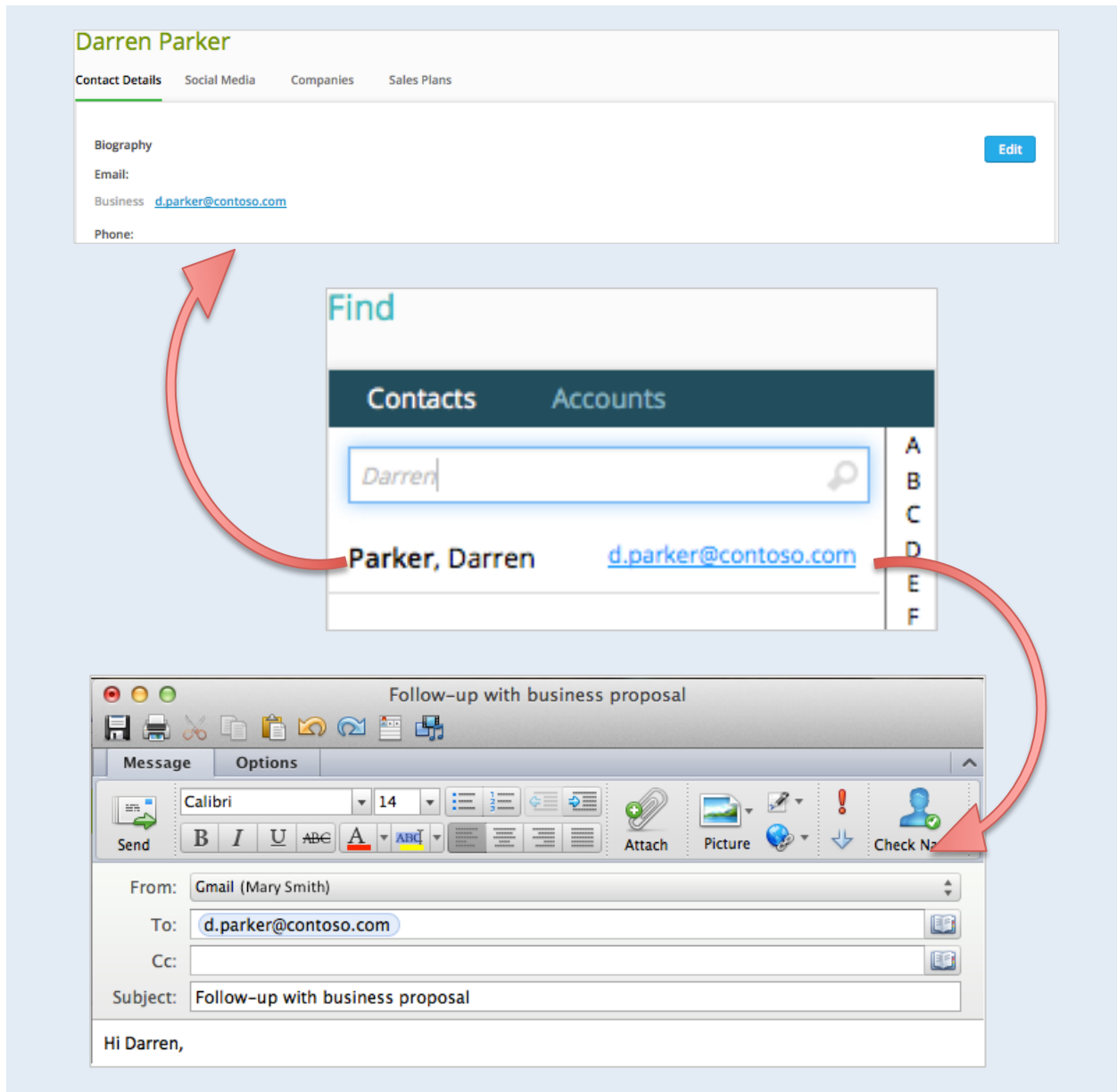
Find

Contacts **Accounts**

Darren

Parker, Darren d.parker@contoso.com

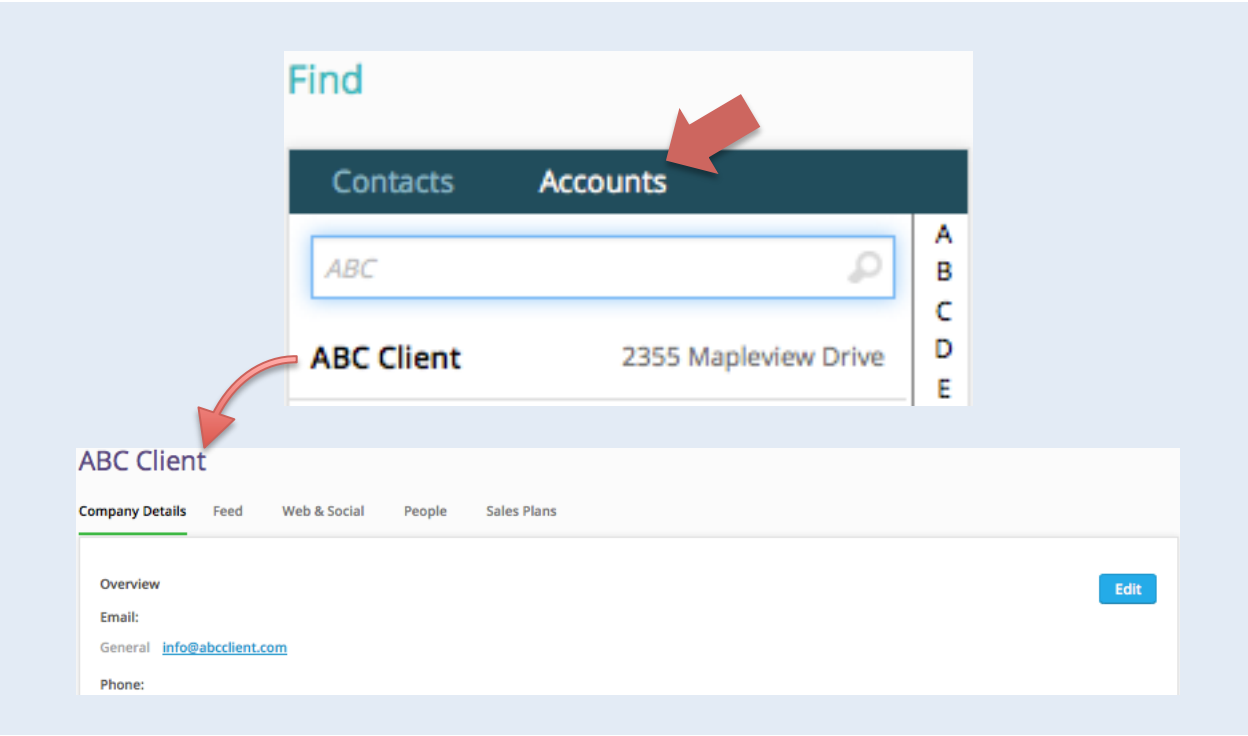
- Clicking on the contact's name will open their contact's detail page or clicking their email will directly open your mail client



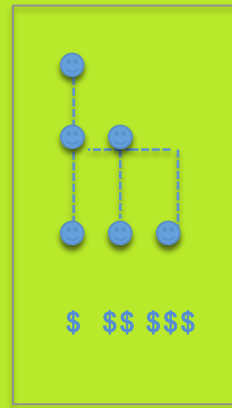
- Click the Accounts tab to switch and search within your list of companies
- Find a company by typing their name in the search bar, scrolling through the numbered pages at the bottom or selecting a letter from the alphabet bar on the right

Find Accounts

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



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.

The screenshot displays the SYMPLYFY application interface. At the top, navigation tabs for 'Sales Plans', 'Calendar', and 'Contacts' are visible. The 'Sales Plans' section is highlighted with a yellow callout box stating 'Start your sales at the dashboard'. A red arrow points from this callout to a 'New Sales Plans' button in the top right corner. Below the navigation, a 'Create Sales Plans' section provides instructions: 'Organize your sales leads into plans targetted at your potential accounts'. To the right of this section is a 'performance' box with the text 'Track your sales against what's been forecast'. Below these are two main content areas: 'Recent Activity' and 'Best Opportunities'. The 'Recent Activity' section lists three items: 'Keep track of scheduled meetings', 'Monitor your leads', and 'Save notes about your contacts'. The 'Best Opportunities' section features a green target icon and the text 'Target your most promising leads to help close the sale'. A yellow callout box with the text 'OR from your sales plan list' points to a 'View All Sales Plans' link. Below this, the 'Your Sales Plans' section is shown, featuring a 'New Sales Plans' button, a search bar with the placeholder 'Keyword here' and a 'Find' button, and a table with columns A through Z. The table also includes filters for 'Owned By' (set to 'All') and 'Sort By' (set to 'Recent Added').

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

Create a New Sales Plan

Title * Espresso Sales

Details * 798 lb of Espresso beans

Industry * Food Production

Sales Goal * 7110.18 **Currency** CAD / \$

Duration * Between 09/17/2014 and 12/31/2014

Forecast ☐ Weekly ☒ Monthly

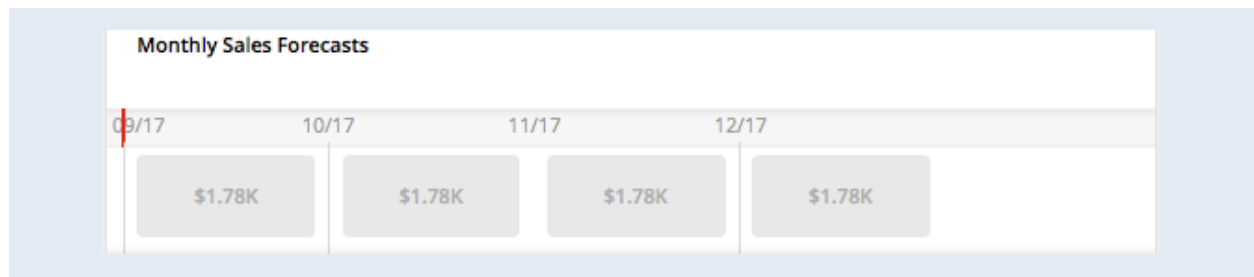
Save **Cancel**

Forecast view

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

Weekly Sales Forecasts					
09/17	09/24	10/01	10/08	10/15	
\$0.45K	\$0.45K	\$0.45K	\$0.45K	\$0.45K	
10/22	10/29	11/05	11/12	11/19	
\$0.45K	\$0.45K	\$0.45K	\$0.45K	\$0.45K	
11/26	12/03	12/10	12/17	12/24	
\$0.45K	\$0.45K	\$0.45K	\$0.45K	\$0.45K	
12/31					
\$0.44K					

OR



Currency settings

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

SYMPPLYFY Sales Plans Calendar Contacts Accounts Reports Mary Smith

[Profile Settings](#)
[Account Settings](#)
Switch Accounts:
Mary Smith Company
Log out

Account Settings Plans and Billing

Account-wide Details

Company Name
Mary Smith Company

Primary Contact Name
Mary Smith

Preferred currency
CAD / \$

Your Profile Photo
YOUR LOGO HERE
Change Image (Size: 65px x 65px)
Browse... No file selected.
☐ Tick to Delete

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

The screenshot shows the 'Sales Plan' interface for 'Bold Sales'. The top navigation bar includes 'Sales Plan Details', 'Leads', 'Opportunities', 'Assets', 'Calendar', and 'Notes'. The 'Sales Plan Details' tab is active, showing a table with one row: 'Bold Sales' with an 'Edit' button. A red dashed arrow points from this 'Edit' button to the 'Edit' button in the main form below.

The main form, titled 'Bold Sales', contains the following fields and options:

- Title ***: Bold Sales
- Details ***: 1091 lb of bold beans
- Industry ***: Food Production
- Sales Goal ***: 11739.16
- Currency**: CAD / \$

A note states: * On changing duration dates or forecast type, forecast chart will be re-generated on update.

Duration *: Between 09/17/2014 and 12/31/2014

Forecast: ☐ Weekly ☒ Monthly

The forecast chart shows four bars for the months 09/17, 10/17, 11/17, and 12/17, with values \$2.94K, \$2.94K, \$2.94K, and \$2.93K respectively. Each bar has an 'Edit' button below it.

At the bottom, there are buttons for 'Update', 'Cancel', and 'Delete'. Below these are two options:

- Sales Plan Status**: ☒ Active ☐ Close
- Delegate Sales Plan to Different Person**: Do not delegate

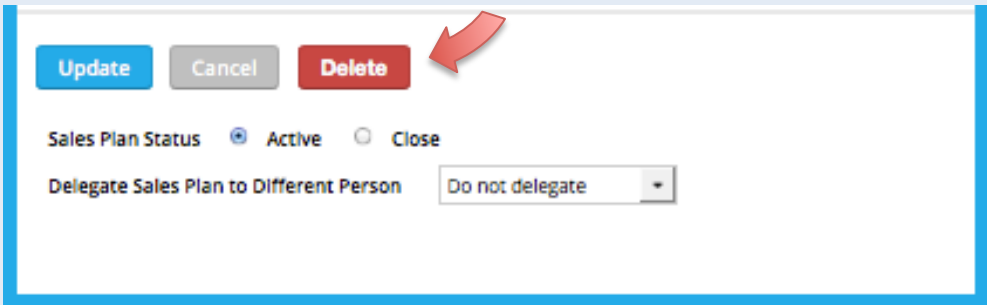
Two callout boxes provide additional instructions:

- A yellow box with a green checkmark says 'Close the sale!' pointing to the 'Close' radio button.
- An orange box says 'Re-assign to a team member' pointing to the 'Delegate Sales Plan to Different Person' dropdown menu.

- 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



The screenshot shows a user interface for managing a sales plan. At the top, there are three buttons: "Update" (blue), "Cancel" (gray), and "Delete" (red). A red arrow points to the "Delete" button. Below the buttons, there is a "Sales Plan Status" section with two radio buttons: "Active" (selected) and "Close". Below that, there is a "Delegate Sales Plan to Different Person" section with a dropdown menu currently showing "Do not delegate". The entire interface is enclosed in a light blue border.

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 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

SALES PLAN

Bold Sales

Sales Plan Details Leads Opportunities Assets Calendar Notes

Bold Sales [Edit](#)

Details
1091 lb of bold beans

Goal: \$11,739.16 (\$CAD)

Closed: \$0.00 (\$CAD)

Monthly Sales Forecasts

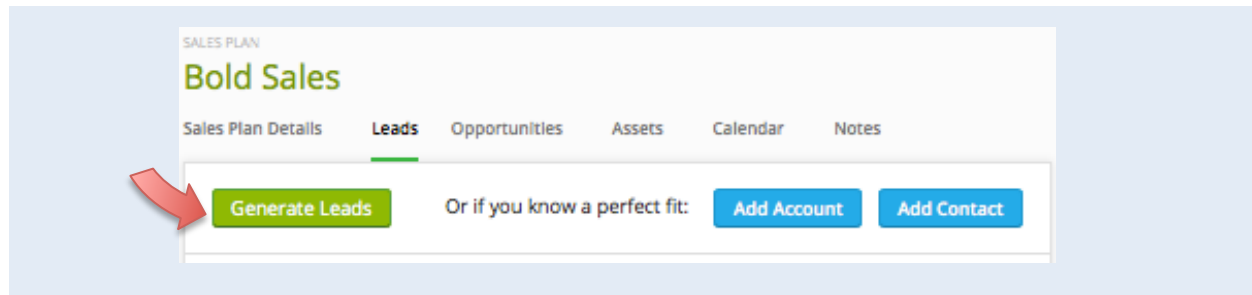
09/17	10/17	11/17	12/17
\$2.94K	\$2.94K	\$2.94K	\$2.93K

Owned By: Mary Smith

Currency: \$CAD

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

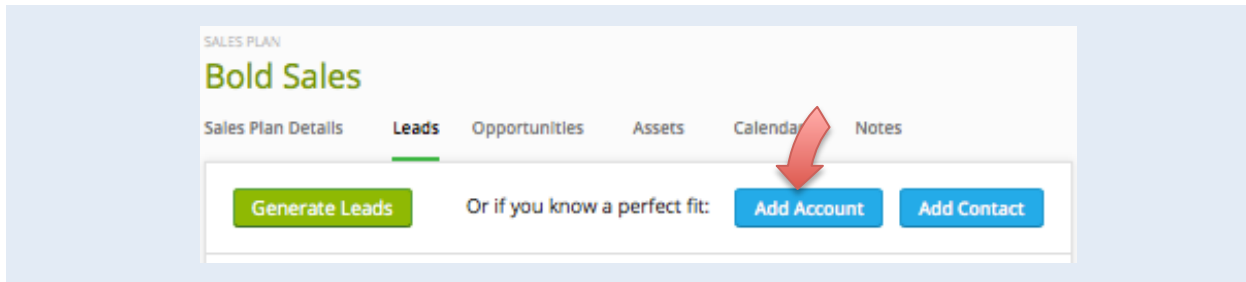
The screenshot shows the 'Generate leads' form. It includes filters for location (Country, Province, City) and company type (Keyword, Size, Fortune, Industry). Callout boxes provide additional context:

- Find your lead from an international or local area:** Points to the 'Filter by location' checkbox.
- Or find your industry specific lead in a**: Points to the 'Filter by company type' checkbox.

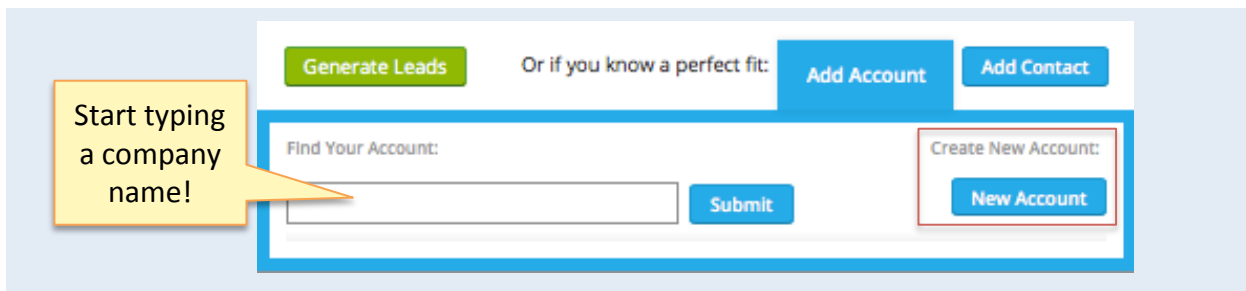
Buttons at the bottom include 'Generate Leads', 'Skip', and 'Include removed accounts'.

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.

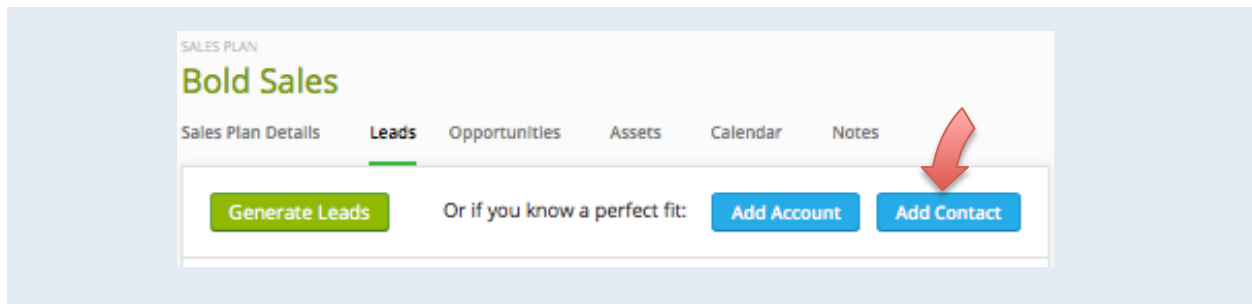
- Or if you already have a company in mind, add them to your leads by searching your accounts list or create a company on the spot. Click the “Add Account” button.



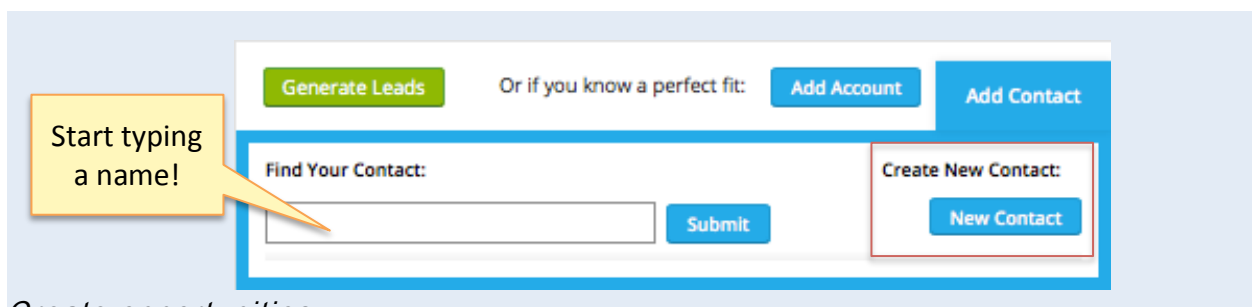
- Type in a company name in the search bar or click “New Account” to fill in a new company form.



- 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.

The screenshot shows a contact profile for "Beantown Roasters" located in "Canada, Ontario" in the "Food & Beverages" industry. Below the header, there are tabs for "Your Contacts", "Position", "Employment", "Networks", and "Opportunity". Under the "Opportunity" tab, a table lists contacts with columns for name, position, employment, networks, and opportunity actions. The contact "Michael Bender" is listed as an "Inventory Specialist" since "2008 - Continue". A red box highlights the "Create New" link in the "Opportunity" column, with a red arrow pointing to it from the text below.

- 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.

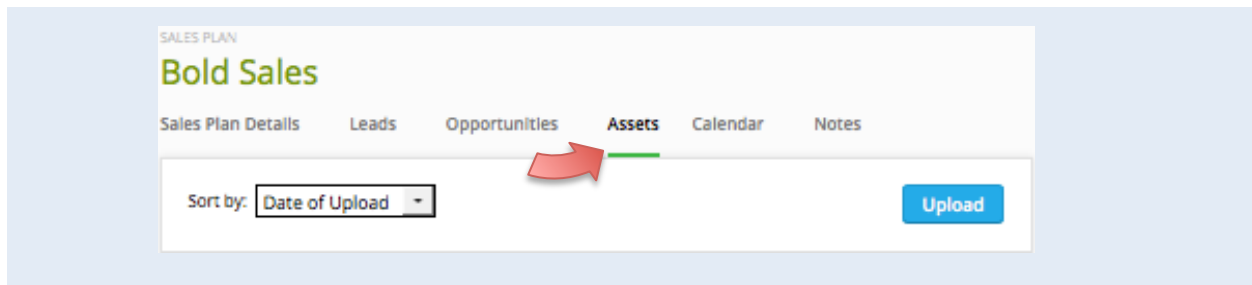
The first screenshot shows the "Create New Opportunity" form with fields for Status (a dropdown menu), Estimate (0.00 \$CAD), Duration (10/10/2014 to 12/31/2014), and Contacts (Michael Bender). A red dashed arrow points from the Status dropdown to the second screenshot. The second screenshot shows the same form with the Status dropdown menu open, displaying a list of options: Preliminary, Qualified, Analysis, Value Proposition, Proposal, Closed (Won), and Closed (Lost). The "Preliminary" option is highlighted. The Duration field now shows 10/08/2014, and the Contacts field now shows Alain Blackburn.

- 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.

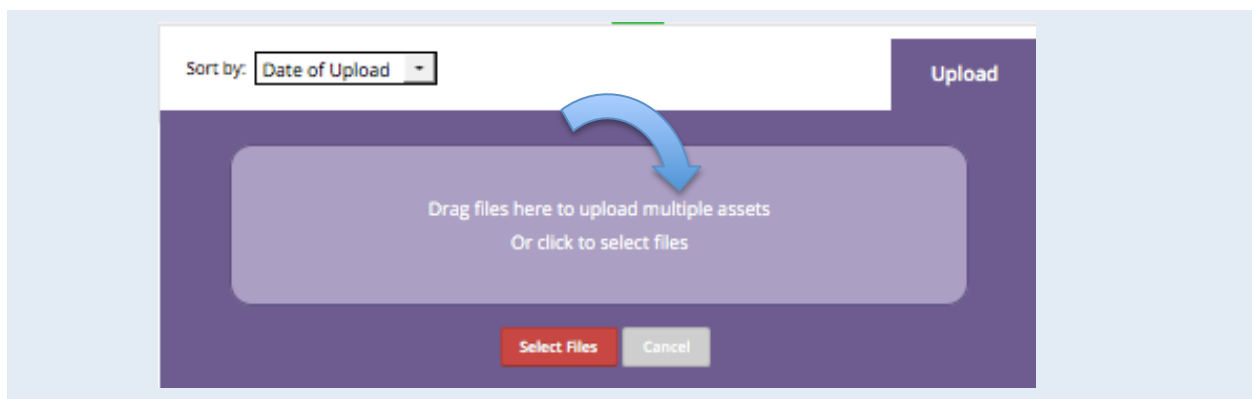
The screenshot shows the "Opportunities" tab selected in the CRM system. A red arrow points to the "Opportunities" tab. Below the tabs, there is a message: "To create a new Sales Opportunity, go to the [Leads](#) section and convert a Contact into an Opportunity". Below this, there is a section for "CONTACT" with the name "Alain Blackburn". Underneath the name, there are links for "For Agnico Eagle Mines Limited", "Recent Activities", "Opportunities", "Calendar", and "Assets". At the bottom, there is a summary row showing "Status: Preliminary", "Estimate: \$3,000.00", and "Progress: 10%" (represented by a progress bar). A red arrow points to the "Opportunities" link in the summary row. A blue "Update" button is located at the bottom right.

Upload assets

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



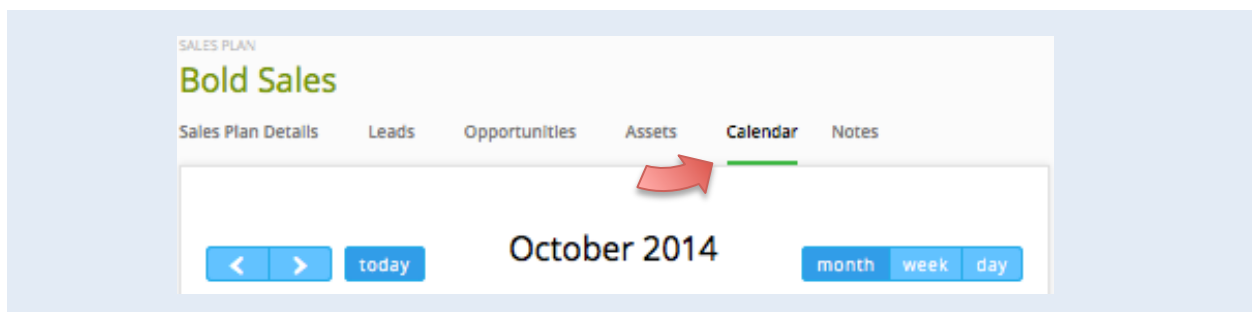
- Upload multiple or single documents and files from your desktop using the drag and drop feature or selecting them from your file window



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”.

October 2014

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

New Appointment

Title * Event Title 140

Start Date 2014/10/10 00:00

End Date 2014/10/10 23:59

Contacts * Choose your contacts

Notes *

Event Type Phone Call

- Reminder
- Meeting
- Email
- Phone Call
- Proposal
- Quote & Contract
- Order

Create Cancel

Choose from a list of your existing contacts

- 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

The screenshot shows a calendar view with a 'Product Demo' appointment highlighted on Friday, October 10, 2014, at 9:30 AM. A red dashed arrow points from this appointment to a 'View Appointment' pop-up window. The pop-up window displays the following information:

- Product Demo**
- A Proposal with [McGregor, A. Douglas](#), [Yamamoto, Akiyoshi](#), [Edwards, Alan](#), [Tan, Amy](#) on 10/10/2014 from 9:30 am to 10:45 am
- Product Demo
- [Edit](#) button and [Close](#) button

Take notes

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

The screenshot shows the 'Sales Plan' interface with the 'Notes' tab selected. A red arrow points to the 'Add a New Note' button. The interface includes a search bar for 'Search Contents of Notes' and a 'Find' button.

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

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

The image displays two side-by-side screenshots of a web application's 'Create New Note' form. Both screenshots show the 'Title' field filled with 'Meeting Notes' and a character count of 127. The 'Category' dropdown menu is open in both, showing options: 'Email Log', 'Personal Meeting' (highlighted in blue), and 'Phone Call Log'. The left screenshot shows the 'Your Note' text area with sample text: 'Members present: Barry Allen, Denis Lapierre, Mary Smith' and 'Business: Current company state: communication through email and Excel spreadsheet.' The right screenshot shows the 'Your Note' text area as empty. Both forms have a 'Tag Contact' field with the placeholder 'Choose your contacts' and 'Submit' and 'Cancel' buttons at the bottom.

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

The screenshot displays the 'Bold Sales' dashboard. At the top, it shows '3 accounts • 25 leads • 0 opportunities'. Below this, it indicates 'Owned By: Mary Smith' and provides two view options: 'Recent Activity (0)' and 'Best Opportunities (0)'. A central 'OR' separator divides the dashboard into two sections. The top section, 'Active Sales Plans', includes a search bar with the placeholder 'Keyword here' and a 'Find' button. Below the search bar is a horizontal list of letters (A-Z) for navigation, followed by filters for 'Owned By: All' and 'Sort By: Recent Added'. The bottom section, 'Closed Sales Plans', shows a summary for 'Bold Sales' with 'Accounts: 3', 'Contacts: 25', and 'Opportunities:'. To the right of the 'Closed Sales Plans' section is a 'Forecast Performance' box with fields for 'Total Forecast' and 'This Month'. Two yellow callout boxes with red arrows provide additional context: one points to the 'Recent Activity (0)' link with the text 'See if your team is actively working on this sales plan', and the other points to the 'Forecast Performance' box with the text 'See your monthly progress compared to your target'.

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

The screenshot displays the 'Sales Plan Timeline' interface. On the left, a vertical timeline under the 'TODAY' header lists four activities, each with an icon: a calendar for 'Created a Proposal with Amy Tan, Akiyoshi Yamamoto, A. Douglas McGregor, Alan Edwards:', a folder for 'Uploaded a new asset:', a tag for 'Wrote a new note:', and a person for 'Added Alain Blackburn to the Opportunities.' Each activity has a blue link below it: 'Product Demo', 'Order #23315 .docx', 'Meeting Notes', and 'Added Alain Blackburn to the Opportunities.' respectively. Red dashed arrows point from these links to three pop-up windows on the right. The top pop-up, titled 'View Appointment', shows details for a 'Product Demo' appointment on 10/10/2014 from 9:30 am to 10:45 am, listing participants: McGregor, A. Douglas, Yamamoto, Akiyoshi, Edwards, Alan, Tan, Amy. The middle pop-up is a file dialog titled 'Opening 1-Order23315.docx' asking what Firefox should do with the file, with options to 'Open with Microsoft Word (default)', 'Save File' (selected), or 'Do this automatically for files like this from now on.' The bottom pop-up, titled 'Meeting Notes', shows a note dated 10 Oct 2014 for 'Sales Plan 6' sales plan, listing members present: Barry Allen, Denis Lapierre, Mary Smith, and Business, with a note about current company state.

Sales Plan Timeline

TODAY

- Created a Proposal with Amy Tan, Akiyoshi Yamamoto, A. Douglas McGregor, Alan Edwards:
[Product Demo](#)
- Today at 09:30 AM
Uploaded a new asset:
[Order #23315 .docx](#)
- Wrote a new note:
[Meeting Notes](#)
- Added Alain Blackburn to the Opportunities.

View Appointment

Product Demo

A Proposal with McGregor, A. Douglas, Yamamoto, Akiyoshi, Edwards, Alan, Tan, Amy on 10/10/2014 from 9:30 am to 10:45 am

Product Demo

[Edit](#) [Close](#)

Opening 1-Order23315.docx

You have chosen to open:

1-Order23315.docx
which is: [1-Order23315.docx]
from: http://hardbootdev.symplyfysales.com

What should Firefox do with this file?

☐ Open with Microsoft Word (default)

☒ Save File

☐ Do this automatically for files like this from now on.

[Cancel](#) [OK](#)

[Back to All Notes](#) [Edit](#) [Delete](#)

Meeting Notes

On 10 Oct 2014 for Sales Plan 6 sales plan

Members present:

Barry Allen Denis Lapierre Mary Smith Business

Current company state: communication through email and Excel spreadsheet.

Calendar

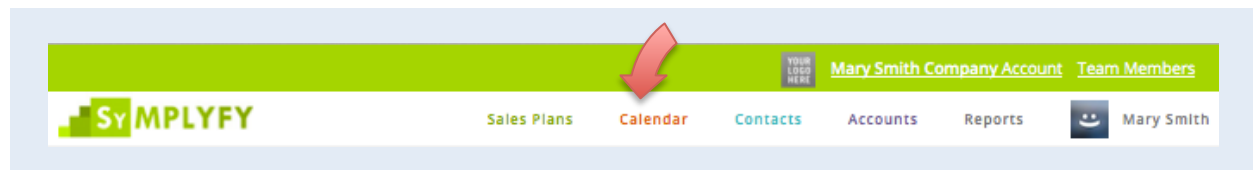


Calendar

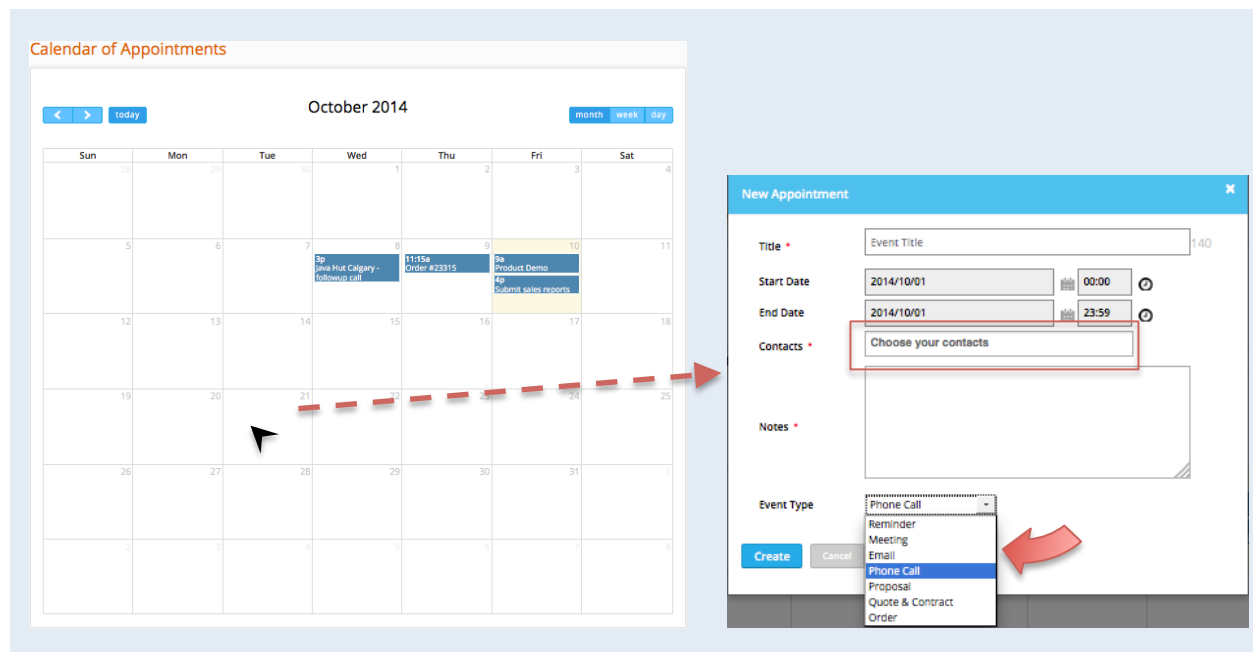
- **Account Calendar** – an account-wide calendar that includes general events for the entire company and each event linked to a sales plan.
- **Sales Plan Calendar** – events can be linked and created directly within a sales plan.

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

Calendar of Appointments

October 2014

View Appointment

Product Demo

A Proposal with [McGregor, A](#), [Douglas, Yamamoto, Akiyoshi](#), [Edwards, Alan](#), [Tan, Amy](#) on 10/10/2014 from 9:30 am to 10:45 am

Product Demo

Edit Close

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

Update Event

Title * Product Demo 128

Start Date * 2014/10/10 09:00

End Date * 2014/10/10 10:00

Contacts * Allen, Barry X Dennis, Caroline X Parker, Darren X

Notes * Product Demo of new bold roast line

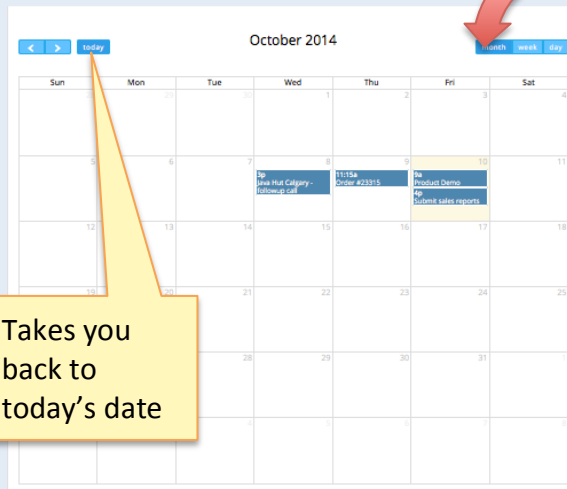
Event Type * Meeting

Update Delete

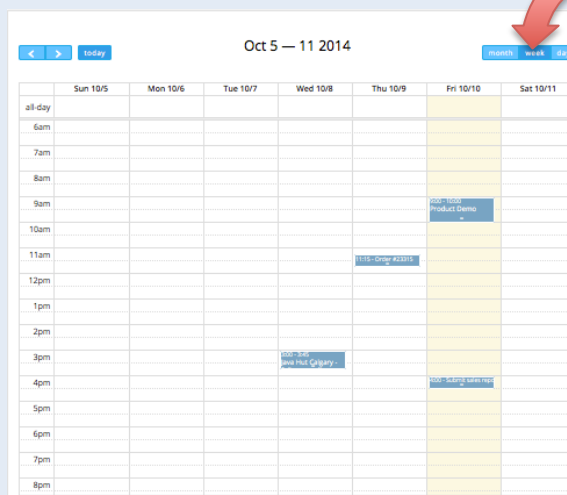
Delete the event in the edit view

Switch calendar views

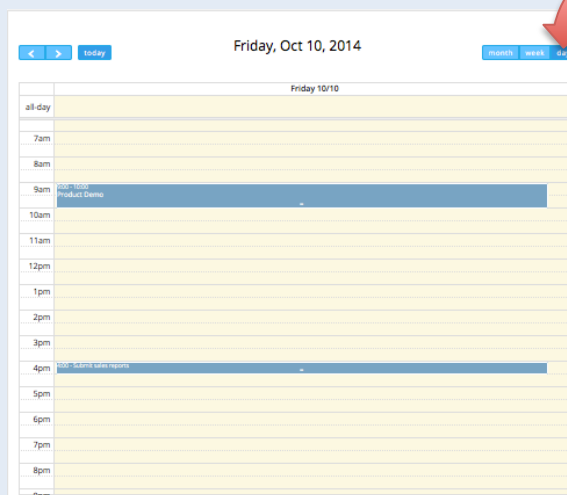
- Toggle the month (default), week, day buttons to change your calendar view
- The Today button will bring you back to today's date if you are not already on it



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