

WiredContact User Guide





WiredContact

User Guide – The Basics

This guide explains how to use the basic functionality of WiredContact.

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Printed in the United States of America. July 22, 2017.

CONTACTING US

WiredContact CRM / Practical Sales Tools, Inc.
716 DeKalb Pike, Suite 208
Blue Bell, PA 19422

Web site: www.wiredcontact.com
Info: info@wiredcontact.com
Support: support@wiredcontact.com
Sales: 888.433.2891 or 215.641.8585
Fax: 215.565.2711

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WiredContact CRM Overview

WiredContact is a cloud-based CRM (customer relationship management) system that enables you to easily track, update and share information about Leads, Prospects, Vendors and Customers. You can record detailed information about each interaction with contacts, schedule follow up calls and manage sales opportunities.

The views and navigation in this document are based on the demonstration database and can be customized for your specific needs.

Below are some key features you will be able to use:

- Recording of daily sales activities with Contacts, including calls, meetings, quotes and other to-dos. This is valuable information to see all the history that has transpired with a Contact.
- Scheduling Follow up calls and other activities to ensure regular contact is made with all Customers and Leads.
- Tracking Quotes and Sales Opportunities to ensure timely follow up.
- Ability to track Product interest and other relevant information.
- Easy-to-use Lookup capabilities to instantly find target accounts or Contacts.
- Activity and Sales Opportunity reports can be printed or exported to .csv.

By using your Computer, Tablet or Mobile device connected to the Internet, all the information is recorded in real-time and saved on a server in a centralized location.

Chapter 1: Accessing the WiredContact Database

You will be provided with a Username and Password to access WiredContact on any computer, tablet or mobile phone.

For Computers & Tablet access, go to your assigned Web address for WiredContact.

- Bookmark this address to your favorites from the Login Page.

For mobile access, open the browser on your phone and type demos.wiredcontact.com

To add to your device Home screen – when on the Login Page, click:

- iPhones: “Add to Home Screen”
- Androids: “Add Shortcut to Home Screen”

An icon will appear on your phone’s Home screen for WiredContact.

- You will be prompted to save your Username / Password if you want.

TIP! Bookmark the web address on your Computer, Tablet or Mobile device before you login for easy future access to the site.

Browser Settings

You can use any browser on any platform with WiredContact.

To ensure optimum capabilities, we recommend enabling Pop Up Windows for your WiredContact site and also configuring your Browser settings so it displays the newest information each time (otherwise you may get a cached page).

Below are reference videos and documentation to configure your browser (only needs to be done once):

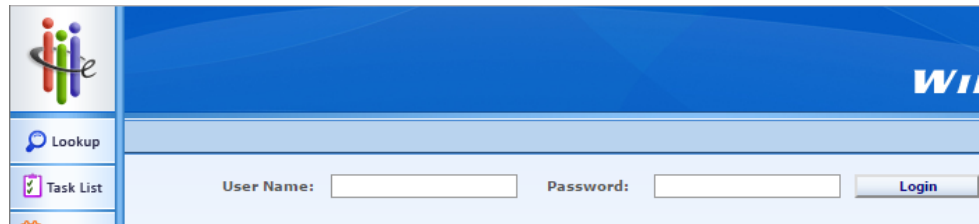
Internet Explorer: <http://www.wiredcontact.com/wcmedia/iesettings.html>

Chrome: <http://www.wiredcontact.com/wcmedia/chromesettings.html>

Firefox: <http://www.wiredcontact.com/wcmedia/firefoxsettings.html>

Logging In

1. In the User Name box, type your **User Name**.

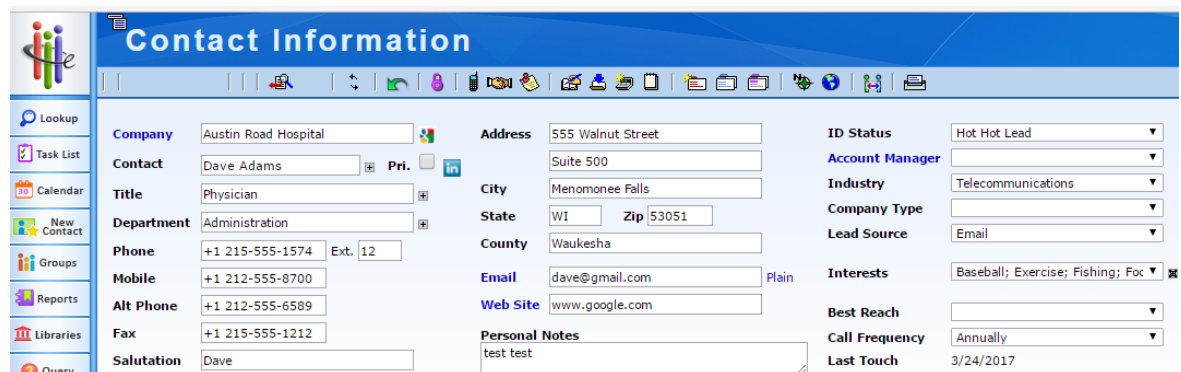
The image shows the WiredContact login interface. On the left is a sidebar with icons for 'Lookup', 'Task List', and a 'Wire' logo. The main area has a blue header with the 'Wire' logo. Below the header are two input fields: 'User Name:' and 'Password:'. To the right of the 'Password:' field is a 'Login' button.

2. Type your Password. **Your Password is cAse SenSiTiVe.**

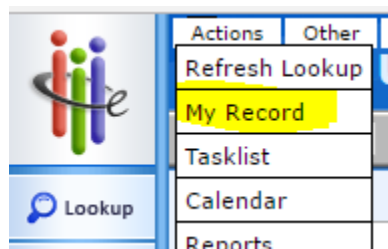
If you would like to change your Password, please follow the Instructions here:

resource.wiredcontact.com/docs/WiredContact_ChangingPassword.pdf

3. The first time you log in, you will be presented with your **"My Record"**. Please verify and update your information in this view. The values are used in your e-mail signature when you send outbound e-mail directly from WiredContact.

The image shows the 'Contact Information' form in WiredContact. The form is divided into several sections: 'Company' (Austin Road Hospital), 'Contact' (Dave Adams), 'Title' (Physician), 'Department' (Administration), 'Phone' (+1 215-555-1574), 'Mobile' (+1 212-555-8700), 'Alt Phone' (+1 212-555-6589), 'Fax' (+1 215-555-1212), 'Salutation' (Dave), 'Address' (555 Walnut Street, Suite 500), 'City' (Menomonee Falls), 'State' (WI), 'Zip' (53051), 'County' (Waukesha), 'Email' (dave@gmail.com), 'Web Site' (www.google.com), 'ID Status' (Hot Hot Lead), 'Account Manager', 'Industry' (Telecommunications), 'Company Type', 'Lead Source' (Email), 'Interests' (Baseball; Exercise; Fishing; Fox), 'Best Reach', 'Call Frequency' (Annually), and 'Last Touch' (3/24/2017). There is a 'Personal Notes' field with the text 'test test'.

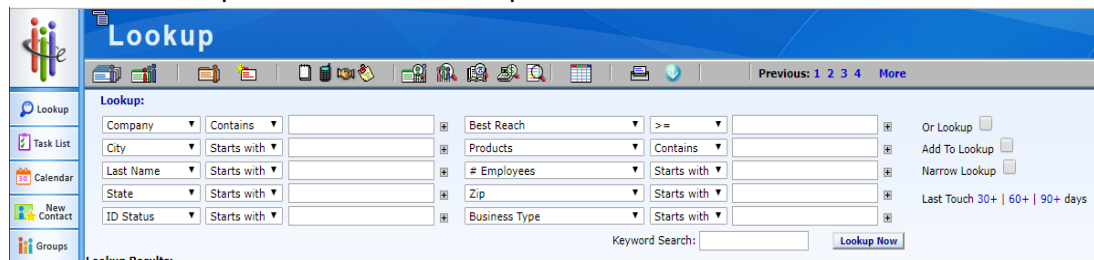
If your page did not open to your **"My Record"**, click the Menu icon above the title and select **"My Record"**.



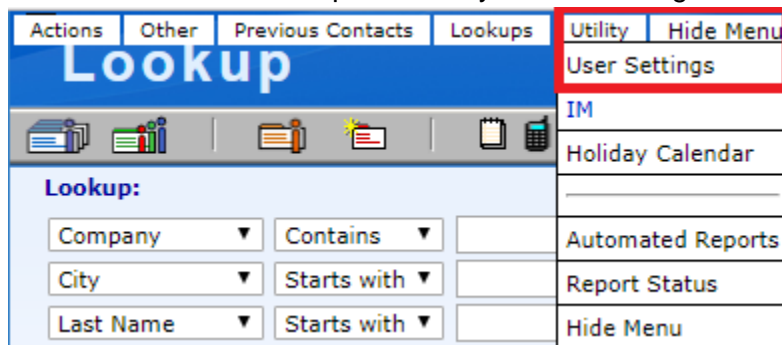
If you need to access it in the future, follow the directions here:

www.wiredcontact.com/Docs/UpdatingYour_MyRecord.pdf

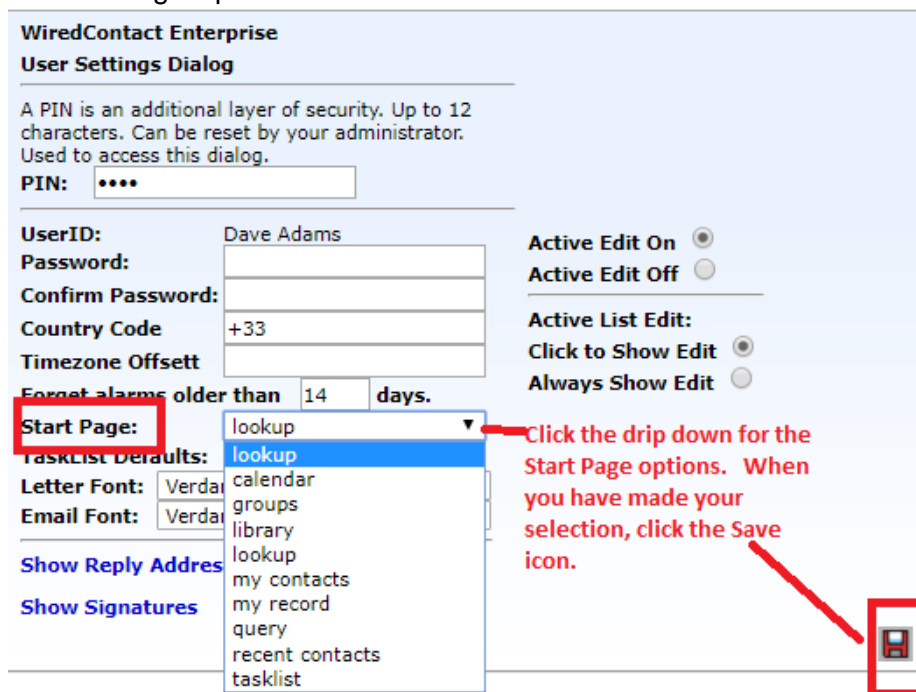
4. For all future logins, your default start page will be the **Lookup** screen. The Lookup view allows you start looking up specific contacts within the database. This Guide will detail this Lookup screen in future Chapters.



5. To change your Start Up Page
 - a. Go to the Menu on the top left >Utility > User Settings



- b. User Settings Options



Chapter 2: Understanding the WiredContact Layout

Navigating the Contact Information View

1. The **top half** of the Contact view has basic contact demographic details in the left and middle columns.

The right-most column contains Profile information such as ID/Status (type of contact this is), IndustryType, Lead Source information and other Profile information.

Contact Information

1 of 10

Company ABC Company **Address** 1313 Cherry Tree Road **ID Status** Customer

Contact Jim Smith **City** Blue Bell **Account Manager** Jay Jones

Title Business Manager **State** PA **Zip** 19422 **Industry** Distributor

Department Administration **County** Pennsylvania **Company Type** Public

Phone +1 215-555-1212 Ext. **Email** Plain **Lead Source** Trade Show

Mobile (2) 1 52 22 15 15 **Interests**

Alt Phone (2) 1 55 55 21 21 **Best Reach** Phone-Office

Fax **Web Site** **Call Frequency**

Salutation Jim **Personal Notes** Do not call prior to 1030 am EST **Last Touch** 7/22/2017

Filter history for: Jim Smith

1

Date/Time	Record Manager	Type	Subject
1/12/2012 9:29 AM	Dave Adams	Letter Sent	Example Letter
10/8/2009 1:40 PM	Dave Adams	Letter Sent	Thank You Letter

2

Email History | Notes | History | Attachments | Activities | Groups | Sales/Opps | Profile Info | Company | Co History | Letters | Email | Picture | Status

2. There are **Tabs** of information on the bottom which pertain to the Contact you are viewing:
 - a. **Email History** – a log of recorded emails
 - b. **Notes** – a log of recorded notes (think like a 'Post-It' Note)
 - c. **History** – is a log of each interaction with the contact (Calls, Meetings, E-mails, etc.)
 - d. **Attachments** – you can upload files to be attached to the contact
 - e. **Activities** – lists any activities that are scheduled with this Contact

- f. **Groups** – displays the Groups the contact is associated with
 - g. **Sales Opps** – lists any Open, Won or Lost Sales Opportunities with this Contact
 - h. **Profile Info** – additional details regarding Company
 - i. **Company** – lists all Contacts associated with this Company
 - j. **Company History** – combines the history of all Contacts at this Company and lists them in one view.
 - k. **Letters** – you can create pre-defined Letter templates for future use.
 - l. **Email** – you can create pre-defined Email templates for future use. Good for frequent communication to various contacts.
 - m. **Picture** - displays images associated with this contact
 - n. **Status** – displays timestamps of Create Date, Edit Date and other Status fields.
 - o. **Library** – displays shared Templates, Queries and Scripts
3. **Side Bar** icons take you to different views within WiredContact.
 4. **Contact Tool bar** – displays icons that are used to take action (schedule a call, record a meeting, etc.) with the contact you are on.
 5. **Top Menu** – use the top show/hide menu (click the icon above every title page) to navigate to previous contacts, Lookups and User settings.

To update information on the top half of the Contact View, simply type in the value you want. When you exit the field, **the information is automatically saved.**

When adding values to a field, there may be dropdown lists to help you select the appropriate item:

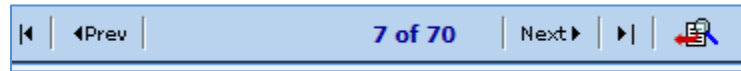
- If you see a “+” sign to the right of the field, you can select a value from the dropdown list.
- If you see an “X” sign to the right of the field, you can select multiple values for that field.
- If you are not able to type directly into a field, that means you can only select values in the drop down list. **Click on the down arrow** and select your option.

The Contact Toolbar



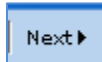
Toolbar Navigator

The toolbar navigator appears after you have performed a lookup and have chosen to view the contact records.

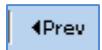


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Counter – Shows the total number of contacts in the lookup, and which contact you are currently viewing.



Next - Brings you to the next contact in the lookup.



Previous – Brings you to the previous contact in the lookup.



Last – Brings you to the last contact in the lookup.



First – Brings you to the first contact in the lookup.



Return to Lookup – Returns you to the Lookup Screen.

Static Toolbar



Refresh - Refreshes your screen for the most up-to-date information.



Undo - You can see your last 100 updates made with the active pages, and can select any item to “undo” to the old value.



My Record - Your contact record. WiredContact uses this information for sending e-mails, letters and retrieving driving directions.



Schedule Call – Schedule a new Call. This activity appears on the Activity tab for the Contact, and the Task List and Calendar. NOTE: there is a also link on the Activity tab to schedule a Task.



Schedule Meeting – Schedule a Meeting with the Contact. This activity appears on the Activity tab for the Contact, and the Task List and Calendar. NOTE: there is a also link on the Activity tab to schedule a Task.



Schedule To Do – Schedule a Call, Meeting, E-Mail or Proposal. This activity appears on the Activity tab for the Contact, and the Task List and Calendar. NOTE: there is a also link on the Activity tab to schedule a Task.



Record Unscheduled activity – log a call, meeting or Task that was not previously scheduled. You also can record from the History tab using the quick links.



Attach file – attach a file to the Contact you are in. It displays on the Attachment tab and History tab.



Add Sales Opportunity – create a new sales opportunity for this contact. You can also use the big “Add Sales Opportunity” button from the Contact view.



Add Note – create a new Note for this contact.



New Contact - Create a new contact in the database.



Duplicate Contact, All Fields - Creates a new contact with the same information as the original contact.



Duplicate Contact, Primary Fields - Creates a new contact with the same Company name, address, and phone number.



Directions - Gives you directions to the current contact's address from the address listed on your “My Record”.



Maps - Gives you a map of the current contact's address.



Merge – Merge duplicate contacts.



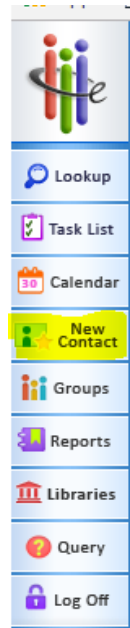
Print – Send a report to print the contact screen.

Add a New Contact

First, perform a search ([see Chapter 7 - Lookups](#)) to see whether that contact is already in the database. If that contact is not in the database, you can add a new contact by clicking on the “New Contact” icon on the sidebar.

You will be presented with a blank screen. Click through the web page and add the respective information about the contact.

TIP! If you add a potential duplicate contact with the same Company name and Contact name, you will see an alert at the top of the screen. You can opt to continue or merge the records.



Understanding the Contact Fields

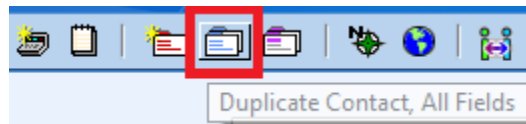
- a) **Pri** – stands for “Primary Contact”. When this box is checked, this contact’s name is bolded and starred in lists.
- b) **Last Touch** – this field is automatically updated with the date of the “last touch” of a completed interaction with a contact (Call completed, Meeting held, E-mail sent), etc. This is a helpful field to search on in the Lookup view to find all the contacts you haven’t called on within a specific time frame. (Shortcut links are included on the Lookup view).
- c) **ID/Status** – indicates what type of a contact this person is. This is helpful when you are searching for all your leads or your Customers.
NOTE: When the ID/Status field changes, it is recorded into the History tab.

TIP! Type a **ZipCode** in the ZIP field, and the City and State will automatically be filled in!

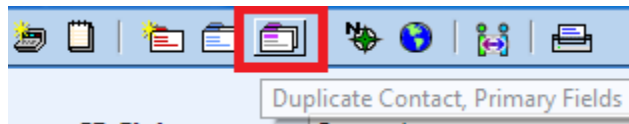
Duplicate a Contact at the Same Company

You can easily add another Contact at the same Company without having to type in all the details of the Company, i.e. address, ID Status, etc.

All Fields: On the Contact Toolbar, click the rolodex icon that reads “**Duplicate Contact, All Fields**”. This will duplicate all the information stored on your current contact, except for the contact specific details (name and email address).



Primary Fields Only: On the Contact Toolbar, click the rolodex icon that reads “**Duplicate Contact, Primary Fields**”. This will duplicate the primary fields of your current contact, Company, Address and ID Status only.



Viewing all Contacts at the Same Company

The **Company** tab displays all the contacts at the Company you are viewing.

George Brown	ABC Company		
*John Cellini	ABC Company	Chairman	+1 610-909-2207
Renee Cronin	ABC Company		
John Davis	ABC Company	Sales Manager	+1 215-555-1212
Jane Doe	ABC Company		
Tom Gallagher	ABC Company	Operations Manager	+1 760-555-1234
Olen Hancock	ABC Company	Operations Manager	+1 760-555-1234
Jack	ABC Company		+1 215-555-1212
Barry James	ABC Company	BOFH	+1 972-625-2252
John James	ABC Company	BOFH	+1 972-625-2252
Jim Jones	ABC Company	Vice President, Operation	+1 215-555-1212
Mike Jones	ABC Company		
Lisa Jones	ABC Company	Director of Marketing	+1 215-212-1777
Mary Jones	ABC Company		
*Mike Jonestown	ABC Company	Vice President, Operation	+1 215-555-1212
mp	Abc company		
test person	ABC Company	Chairman	+1 215-858-6400
aaa person	ABC Company	Chairman	+1 215-858-6400
History Notes History Attachments Activities Groups Sales/Opps Profile Info Company			

TIP! You can navigate to the other contacts in the list by clicking on their name in the first column.

Deleting a Contact

If you want to delete a contact, go to the **Status** tab. Checkbox the field called “Mark for Deletion”.

ABC Company,

Last Reach

Last Meeting

Last Attempt

Create Date

Edit Date

Record Manager

Record Creator

Owner

7/20/2017 11:33 AM

7/20/2017 11:33:29 AM

Dave Adams

Wendy Smith

Mark for Deletion

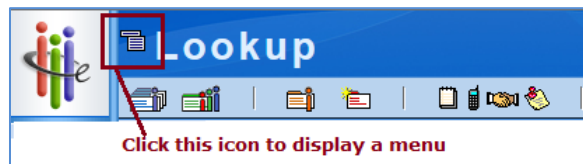
☐

Email HistoryNotesHistoryAttachmentsActivitiesGroupsSales/OppsProfile InfoCompanyCo HistoryLettersEmailPictureStatusLib

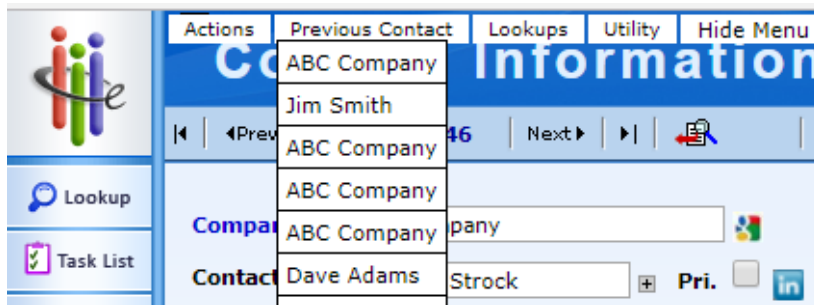
Records “**Marked for Deletion**” will be purged on a regular basis by the Administrator.

To Navigate to a Previous Contact

Use the Menu at the top of each page to access a list of short cut links. Click on the menu icon to display all the functions.



The “**Previous Contacts**” menu will display the last 7 contacts you recently viewed.



Chapter 3: Scheduling an Activity

Activity Overview

Tasks are calls, meetings, and other activities you schedule with contacts in your database.

When you schedule an activity with a Contact, it appears:

1. On the **Activity** tab of the Contact.
2. On the **Task List**
3. On the **Calendar**

You can reschedule on a contact's Activity tab or in the Task View.

In WiredContact, activities need to be cleared (clearing an activity may also be referred to as completing an activity).

Once an activity has been cleared, it is automatically recorded in History. The History tab displays all of the completed activities, results, and activity details for a given contact.

Scheduling a Task (Call, Meeting, ToDo) – Contact View

Tasks (activities) can be scheduled when on a Contact, or from the Calendar View or when clearing an activity with a Contact (with a Follow up).

1. To Schedule a New Task when on a Contact, click on the link on the Activities tab or for *FOLLOW UPS*, click on “Schedule: 2 7 14 30 icons on the Contact toolbar. (Click on the appropriate # for the activity)

The screenshot shows the 'Contact Information' form in WiredContact. The form is divided into several sections: Company, Contact, Address, ID Status, and various other fields. A toolbar at the top contains icons for different actions. A red box highlights the 'Schedule: 2 7 14 30' link in the bottom right corner of the form.

2. You are then presented with the Schedule dialog. Select the “**Type**” of activity (the default is **Call**). Other choices are **Meeting**, **Customer Service Call**, **Marketing Call**, **Sale**, **Service Call**, **Todo**, **Other**.
3. The “Regarding” list changes depending upon the activity Type selected.

You can add your own “regarding” by clicking the + sign to the right of the regarding dropdown field.

Schedule with: Anthony Strock ↓

Type: **Priority:** **Timeless:** ☒

Date: **Time:** **Duration:**

Set Alarm: ☐ **Lead Time:**

Regarding:

Details:

Schedule For:

Scheduled By: Dave Adams ☐

Select date, time and duration below:

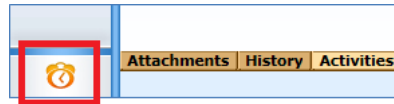
July 2017							August 2017							September 2017						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
						1			1	2	3	4	5						1	2
2	3	4	5	6	7	8	6	7	8	9	10	11	12	3	4	5	6	7	8	9
9	10	11	12	13	14	15	13	14	15	16	17	18	19	10	11	12	13	14	15	16
16	17	18	19	20	21	22	20	21	22	23	24	25	26	17	18	19	20	21	22	23
23	24	25	26	27	28	29	27	28	29	30	31			24	25	26	27	28	29	30
30	31																			

9:30	10:30	11:30	12:30	1:30	2:30	3:30	4:30	5:30	6:30
5min	10min	15min	20min	30min	45min	1hr	2hr	4hr	1day

Point and Click shortcuts for Date, Time and Duration.

- If you do not want to designate a time for the Activity, click on “**Timeless**”. The Activity will appear on your Task List for that day.
- If you would like an email reminder prior to the activity, click on the respective timeframe to receive your email alarm.

- You can set a standard “pop up” alarm to display prior to the Task if WiredContact is open. If you select this box (by checking it), indicate your Lead time. You also need to make sure your Pop up Alarm is enabled. Toggle the clock in the lower left corner to ensure your Pop ups are “on”. (If gray, then the pop up alarm is in the “off” position).



- This Activity will then appear on your Task List, Calendar and Activity tab for that Contact.

Scheduling an Activity – Calendar View

You can also schedule an Activity from the Calendar. When you schedule an Activity from the Calendar, it shows up in your Task List and under the Activity tab for that Contact.

- Choose your Calendar view: Daily, Week or Month, and who's Calendars you wish to see:



Calendar

Showing calendar for Paul Sergio, Wendy Smith

Day/Week/Month Views

December 2015

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6						
13						
20						
27						

January 2016

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2

http://demos.wiredcontact.com/?function=cschedule&src=calendar&dt=12/4/2015&tm...

Schedule with: Wendy Smith

Type: Call **Priority:** Low **Timeless:** ☐

Date: 12/4/2015 **Time:** 10:00 AM **Duration:** 10

Alarms: Set Standard ☐ Standard Lead Time: 10

Email: Day of ☐ | Hour Before: ☐ | 15 Minutes Before: ☐

Regarding:

Details:

Schedule For: Wendy Smith

Scheduled By: Wendy Smith ☐ Send an email reminder

Click the + sign to schedule an activity

When scheduling from the Calendar, the last 20 contacts you navigated to are listed. You can also search for the contact by clicking on the magnifying icon so you schedule with the correct contact.

Click the + sign to add your own "regarding" for this activity

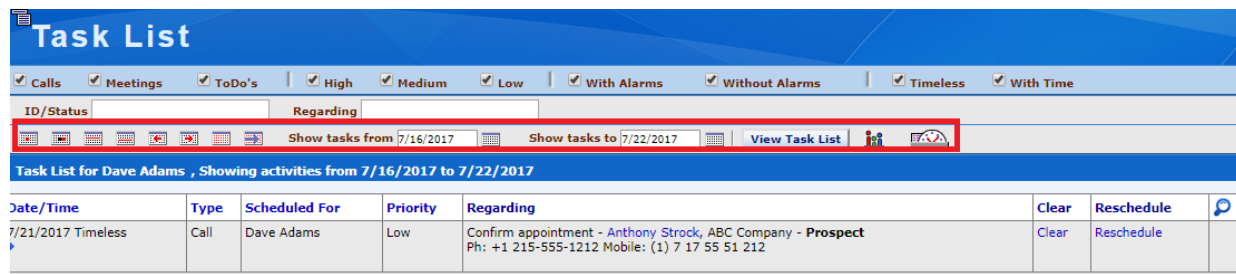
TIP! To schedule an all-day event, under “duration”, type in the number of hours you want to block off with an “h” after it. For example, 8H. This will block off the next 8 hours.

Chapter 4: Managing your Activities & Recording to History

The Task List is a listing of all your Activities that have been scheduled for the time frame you have selected.

The Task List is set to display the Activities scheduled for that day, and will also display any activities from prior dates that have not been cleared (completed) yet. They will be highlighted so you know they are “past due” activities.

There are icons that are pre-defined with timeframes (today, tomorrow, this week, etc.) When you put your cursor over an icon, the mouse over will tell you what that icon is for. Modify as appropriate.



The screenshot shows the 'Task List' interface. At the top, there are filter tabs for 'Calls', 'Meetings', and 'ToDo's', each with sub-filters for 'High', 'Medium', and 'Low' priority, and 'With Alarms', 'Without Alarms', 'Timeless', and 'With Time'. Below the filters, there are input fields for 'ID/Status' and 'Regarding', and a 'View Task List' button. A red box highlights the date range selection area, showing 'Show tasks from 7/16/2017' and 'Show tasks to 7/22/2017'. Below this, a blue header bar reads 'Task List for Dave Adams , Showing activities from 7/16/2017 to 7/22/2017'. The main table has columns: 'Date/Time', 'Type', 'Scheduled For', 'Priority', 'Regarding', 'Clear', and 'Reschedule'. A single task is listed for 7/21/2017, Type 'Call', Scheduled For 'Dave Adams', Priority 'Low', Regarding 'Confirm appointment - Anthony Strock, ABC Company - Prospect', with phone numbers '+1 215-555-1212 Mobile: (1) 7 17 55 51 212'. The 'Clear' and 'Reschedule' buttons are blue and link to 'Clear' and 'Reschedule' respectively.

Date/Time	Type	Scheduled For	Priority	Regarding	Clear	Reschedule
7/21/2017 Timeless	Call	Dave Adams	Low	Confirm appointment - Anthony Strock, ABC Company - Prospect Ph: +1 215-555-1212 Mobile: (1) 7 17 55 51 212	Clear	Reschedule

Using the Task List

Prior to performing your scheduled Activity, you can easily review notes from previous interactions with this contact and view other pertinent information that is stored on the Contact record.

It is recommended to either:

1. Click on a **Contact name link** to go to the Contact Record > History tab to view past interactions.

OR

2. Click on the **magnifying glass icon** on the Task List to put all the Contacts from your Task List into a Lookup List. This will allow you to easily scroll through your Contacts and perform your Calls on the Task List.

The screenshot shows the 'Task List' interface. At the top, there are filters for 'Calls', 'Meetings', 'ToDo's', 'With Alarms', 'Without Alarms', 'Timeless', and 'With Time'. Below these are search fields for 'ID/Status Contains' and 'Regarding'. A 'View Task List' button is also present. The main table lists tasks with columns: Date/Time, Type, Scheduled For, Regarding, and actions (Clear, Reschedule, Print). Three red boxes with arrows point to specific elements: one to a contact name 'Dan Jones' in the 'Regarding' column, one to a magnifying glass icon in the top right, and one to a 'Print' button in the actions column.

Date/Time	Type	Scheduled For	Regarding	Clear	Reschedule	Print
10/3/2016 Timeless	Call	Jennifer Smith	Schedule a meeting - Dan Jones , Lafayette Golf Course - Customer Ph: 215-999-8754	Clear	Reschedule	Print
Tue 10/4/16 2:30 pm	Meeting	Jennifer Smith	1st meeting - John James, XYZ Tool - Prospect Ph: 610-955-4875 Details: bring spec sheets for manufacturers			
Tue 10/4/16 4:00 pm	Call	Jennifer Smith	Follow up In-Store Lead - Tom Johnson, Ed's Truck Sales - In-Store Lead Ph: 303-548-5544 Mobile: 303-555-1212			

Clearing (Completing) Activities

Scheduled activities in WiredContact need to be cleared (completed) to remove them from your Task List. Once they are cleared, the results will be recorded to the History Tab.

NOTE: When “clearing” an activity, you are recording details of the interaction in the “details” section. Those notes will automatically be listed on the History tab for that Contact.

After you have completed your scheduled activity, you can clear that activity by either using the Task List or going to the Activity tab for that Contact.

Clearing an Activity from the Task List – Click “Clear”

The screenshot shows the 'Task List' interface with a table of activities. A modal dialog titled 'Clear Activity with: Wendy Smith' is open, allowing users to clear or reschedule an activity. The dialog includes fields for Type, Priority, Timeless, Date, Time, Duration, Alarms, Email, and Regarding. A red box highlights the 'Clear' button in the dialog, and another red box highlights the 'Clear' button in the table's right-hand column. A red arrow points from the 'Clear' button in the table to the 'Clear' button in the dialog. A red box also highlights the 'Details' field in the dialog, with a note: 'Record details here. This will display then in the History tab for that contact.'

Date/Time	Type	Scheduled For	Priority	Regarding	Clear	Reschedule
Fri 12/4/15 8:00 am	Meeting	Wendy Smith	Medium	call on Jane Barber - Wendy Smith, XYZ Software Company - Customer	Clear	Reschedule
Fri 12/4/15 8:00 am	Meeting	Wendy Smith	Medium	don't forget to call on Sam Smith - Wendy Smith, XYZ Software Company - Customer	Clear	Reschedule
Fri 12/4/15 8:00 am	Meeting	Wendy Smith	Medium	test - Mike Jonestown, ABC - Wendy Smith, XYZ Software Company - Customer	Clear	Reschedule
Fri 12/4/15 9:00 am	Meeting	Wendy Smith	Medium	Presentation - Jane Barber - Wendy Smith, XYZ Software Company - Customer	Clear	Reschedule
Fri 12/4/15 12:00 pm	Meeting	Wendy Smith	High	Demonstration - Mike Jones - Wendy Smith, XYZ Software Company - Customer	Clear	Reschedule
Fri 12/4/15 12:00 pm	Meeting	Wendy Smith	High	Meeting (Mike Jones): Demo - Wendy Smith, XYZ Software Company - Customer	Clear	Reschedule
Fri 12/4/15 12:30 pm	Todo	Wendy Smith	High	Send proposal - Jane Barber - Wendy Smith, XYZ Software Company - Customer	Clear	Reschedule
Fri 12/4/15 1:00 pm	Call	Paul Sergio	High	Review Proposal - Jim Jones - Wendy Smith, XYZ Software Company - Customer	Clear	Reschedule

Clearing an Activity from the Activity tab when on a Contact – click “Clear”

The screenshot shows the 'Activity' tab interface with a table of activities. A red box highlights the 'Clear' button in the table's right-hand column. The table has columns for Date/Time, Type, Priority, Scheduled For, Scheduled By, and Regarding. The 'Clear' button is located in the right-hand column of the table.

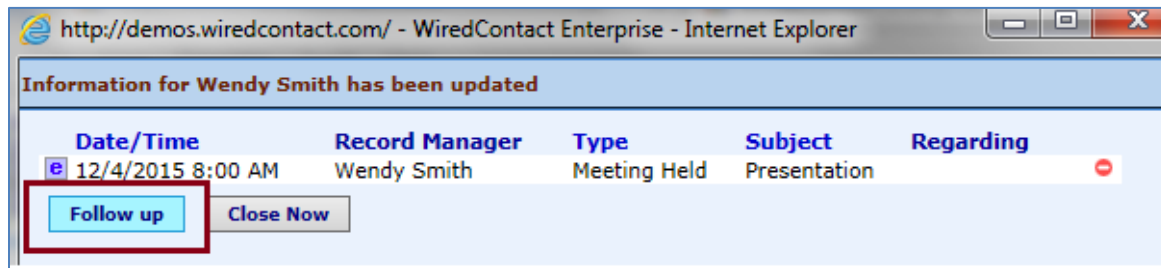
Date/Time	Type	Priority	Scheduled For	Scheduled By	Regarding	Clear	Reschedule
12/4/2015 8:00 AM	Meeting	Medium	Wendy Smith	Wendy Smith	call on Jane Barber	Clear	Reschedule
12/4/2015 8:00 AM	Meeting	Medium	Wendy Smith	Wendy Smith	don't forget to call on Sam Smith	Clear	Reschedule
12/4/2015 12:00 PM	Meeting	High	Wendy Smith	Wendy Smith	Meeting (Mike Jones): Demonstration	Clear	Reschedule

When you click on “Clear”, you are presented with a dialog box to record the result of the Activity and add details about what happened during your conversation or meeting.

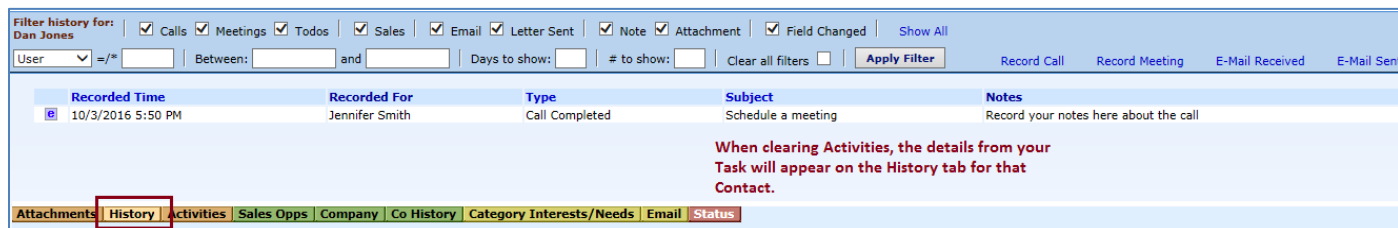
The screenshot shows the 'Clear Activity' dialog box. It includes fields for Type, Timeless, Date, Time, Duration, Set Alarm, Lead Time, Email Day of, Email Hour Before, Email 15 Minutes Before, Regarding, Results, Details, and Schedule For. A red box highlights the 'Clear' button at the bottom right. A red arrow points from the 'Clear' button in the table to the 'Clear' button in the dialog. A red box also highlights the 'Results' field, with a dropdown menu showing options: 'Call Attempted/Left Message', 'Call Completed', and 'Call Received'.

Click “clear” again to record the item to history

After you “Clear” an activity, you can easily schedule your next activity with this Contact by clicking the “Follow Up” button.

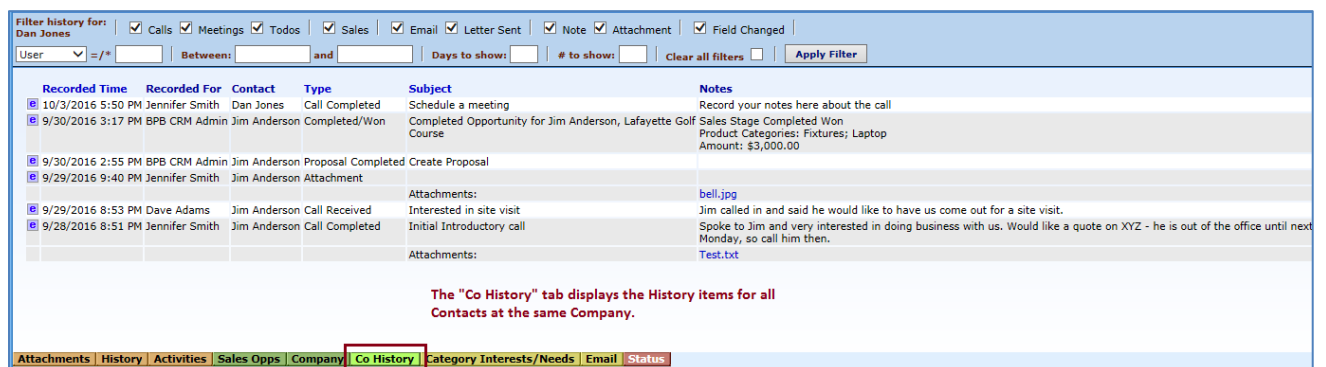


When clearing (recording) an Activity, the Task details and results will appear on the History Tab for that Contact.



Co History Tab

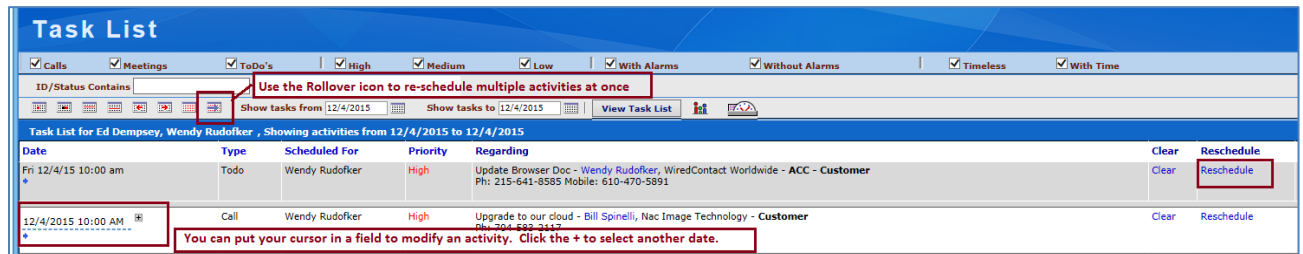
The Company history tab displays the history items (cleared activities) for all Contacts at the same Company.



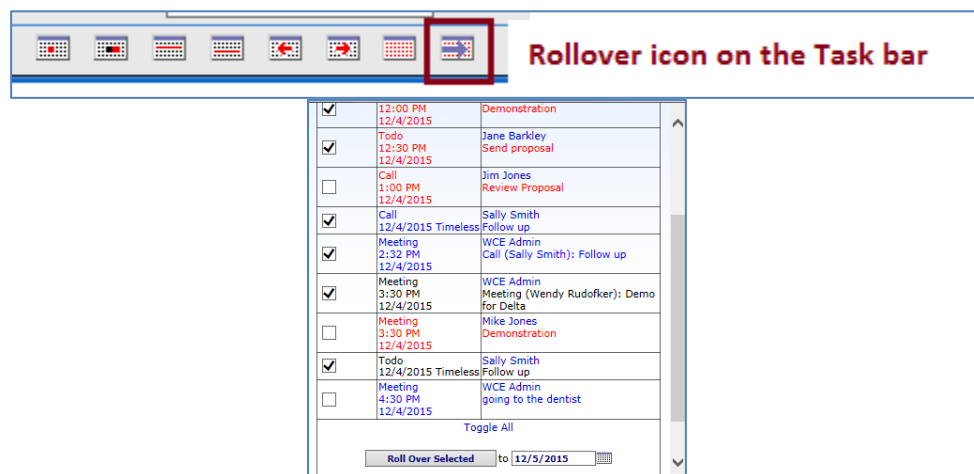
Rescheduling Activities

To Reschedule Activities in your Task List, you can do this one by one or re-schedule all at once.

- You can modify a scheduled activity by clicking on the “**Reschedule**” link.
- You can put your cursor in a field to bring up the solid blue box to modify an activity
- You can click the **Rollover** icon to re-schedule multiple activities at once.



When you click the **Rollover** icon, you can select which activities you want to reschedule by using the checkboxes to the left of the activity, then select your desired date to rollover the activities.



Recording Unscheduled Activities



There will be instances when you will need to record a history item not associated with a pre-scheduled activity. For example, you may want to record a Call Received, E-mail received or record notes from a first meeting with a prospect that didn't already have an activity scheduled.

To record an unscheduled activity to history, go the **History** Tab. There are quick links on the center bar to record the history item based on history type.

Filter history for: **Jim Anderson** | ☒ Calls ☒ Meetings ☒ Todos ☒ Sales ☒ Email ☒ Letter Sent ☒ Note ☒ Attachment ☒ Field Changed | [Show All](#)

User: =/* Between: and Days to show: # to show: Clear all filters ☐ [Apply Filter](#)



[Record Call](#) [Record Meeting](#) [E-Mail Received](#) [E-Mail Sent](#)


Recorded Time	Recorded For	Type	Subject	Notes
9/30/2016 1:55 PM	BPB CRM Admin	Proposal Completed	Create Proposal	
 9/29/2016 8:40 PM	Jennifer Smith	Attachment		
9/29/2016 7:53 PM	Dave Adams	Call Received	Interested in site visit	Jim called in and said he would like to have us come out for a site visit.
 9/28/2016 7:51 PM	Jennifer Smith	Call Completed	Initial Introductory call	Spoke to Jim and very interested in doing business with us. Would like a quote on XYZ - he is out of the office until next Monday, so call him then.
			Attachments:	bell.jpg
			Attachments:	Test.txt

Attachments | **History** | **Activities** | **Sales Opps** | **Company** | **Co History** | **Category Interests/Needs** | **Email** | **Status**

Editing History Items

You will have the ability to edit your own history items. Click on the “e” to the left of the recorded time to add information to your previously recorded history.

Recorded Time	Recorded For	Type
9/30/2016 1:55 PM	BPB CRM Admin	Proposal Completed
 9/29/2016 8:40 PM	Jennifer Smith	Attachment
9/29/2016 7:53 PM	Dave Adams	Call Received
 9/28/2016 7:51 PM	Jennifer Smith	Call Completed



Chapter 5: Managing Sales Opportunities

Sales Opportunities are potential sales so you can easily track the progress of so you can close more sales!

The sales opportunity includes the Product category, Sales Stage, probability of winning the sale, Amount and Gross Margin of the sale, and the anticipated Forecast Close date for each one.

You can have multiple opportunities per Contact and they are displayed on the **Sales Opp tab** for each Contact. Each opportunity has a Status, so you can easily run reports to see all the Open opportunities in your Pipeline, and see those that have been won or lost.

Adding a New Opportunity

To add a new opportunity for a Contact, click the “**Create New Sales/ Opportunity**” icon on the Contact shortcut view.

Or, you can also click the link “Add New Opportunity” from the **Sales Opps** tab.

Contact Information

1 of 10

Company ABC Company

Contact Jim Smith

Title Business Manager

Department Administration

Phone +1 215-555-1212

Mobile (2) 1 52 22 15 15

Alt Phone (2) 1 55 55 21 21

Fax

Salutation Jim

Address 1313 Cherry Tree Road

City Blue Bell

State PA **Zip** 19422

County Montgomery

Email

Web Site

ID Status Prospect

Account Manager Jay Jones

Industry Distributor

Company Type Public

Lead Source Trade Show

Interests

Best Reach Phone-Office

Call Frequency

Last Touch 6/30/2016

Personal Notes Do not call prior to 1030 am EST

Add New Opportunity

Sales Opps

All new Sales Opportunities are created with a **Status = Open**. Complete the rest of the Sales Opportunity information:

- Select the **Product Name**, by clicking the ▼ to the right of the field.
- When selecting a **Sales Stage**, the Probability of closing the sale will be pre-defined.
- Enter the **Units** and **Price** and the **Amount** will auto-calculate.
- Select the **Product Type**, by clicking the ▼ to the right of the field.
- Enter the **Forecast Close date** to identify when this deal is expected to close.
- When you have entered the initial information, click on the Update Opportunity.

Product & Sales Information

Product Name:
Consulting Services ▼

Sales Stage:
Evaluation ▼

Probability:
80

Units:
2

Price:
150

Amount:
\$300

Product Type:
Special order ▼

Forecast Close Date:
7/23/2017

Opportunity Status

Status:
Open ▼

Main Competitor
▼

Details

Actual Close Date:

Reason:

Salesperson:
Dave Adams ▼

Create Date: 7/22/2017 2:02 PM

Proposal Attachment Choose File No file chosen


Update Opportunity

Won Sale

Lost/Dead Sale


Cancel




The Sales Opportunity is displayed on the Sales/Opps tab for the Contact.

Filter sales for: Jim Smith											
<div><input checked="" type="checkbox"/> Open Sales <input checked="" type="checkbox"/> Closed/Won <input checked="" type="checkbox"/> Closed/Lost <input type="button" value="Apply Filter"/></div> <div><div> Add New Opportunity</div><div>Sales Lookup</div></div>											
	Close Date	Forecast Close	Product	Type	Units	Price	Amount	%	Sales Stage	Status	User
		7/23/2017	Consulting Services	Special order	2	150	300	80 %	Evaluation	Open	Dave Adams

Editing a Sales Opportunity


Once you have created your sales opp, you will want to update it to keep it current.

1. Go to the Sales Opps tab for the Contact you want to update the opportunity.
2. Click on the “Open” status icon to display the details of the Sales Opportunity. 
3. Update your information, click “Update Opportunity”.

	Status	Close Date	Forecast Close
	Open		10/28/2016
	Won	9/29/2016	10/14/2016
	Lost	9/29/2016	10/13/2016

Closing a Won or Lost Sale

When you win the sales opportunity or in some instances lose the business, you will need to close out the Opportunity from your sales pipeline. Open the Sales Opportunity dialog, and click the appropriate button along the bottom:

Sales Opportunity for: ABC Company - Jim Smith 

Product & Sales Information

Product Name: Software Sales Stage: Evaluation Probability: 80 Units: 1 Price: 1500.00 Amount: 1500.00


Product Type: Download Forecast Close Date: 7/22/2017


Opportunity Status

Status: Open Main Competitor: Local Supplier Details: They liked our Customer Service

Actual Close Date: Reason: Salesperson: Dave Adams Create Date:

Proposal Attachment WiredCon...late.pdf

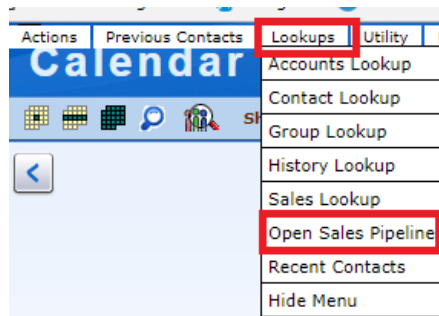
1. If the opportunity is **Won**, click on the “**Won Sale**” button. The system will modify the fields as follows:
 - Status → Won
 - Stage → Closed/Won
 - Actual Close Date will be filled in with today’s date (you can edit, as needed).
 - Update the ID/Status field for the Contact to “Customer” if it is not a customer already.
 - The Sales Tab will display a “Won” icon next to the Opportunity. 

2. If the opportunity is **Lost**, click on the “**Lost/Dead Sale**” button. The system will modify the fields as follows:
 - *Status* → *Lost*
 - *Stage* → *Closed/Lost*
 - Actual Close Date will be filled in with today’s date (you can edit, as needed).
 - The Sales tab will display the “lost” icon next to the Opportunity. 

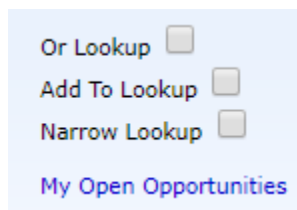
Open Sales Pipeline List

You can easily view all your Open Sales in a list with the stage it is in and forecasted close date.

1. From any view, click on the Menu > Lookups > “Open Sales Pipeline”.



2. You will see a list of all Open Sales Opportunities on the Sales Lookup view.
 - a. To see only your Open Opportunities, click on the “My Open Opportunities” on the right side of the screen:



- b. To update or view the details of the opportunity, click on the “Status” link.
 - c. You can perform a Contact Lookup from your Sales Lookup results by clicking on the magnifying glass, located on the bottom of the list. This will help you view all the activity / history for the Contacts with Open Sales Opportunities.

Sales Lookup

Lookup:

Actual Close ▾ Starts with ▾

Actual Close ▾ Starts with ▾

Actual Close ▾ Starts with ▾

Actual Close ▾ Starts with ▾

Contact Fields Lookup:

Address ▾ Starts with ▾

Address ▾ Starts with ▾

Or Lookup ☐

Add To Lookup ☐

Narrow Lookup ☐

Click the Status link to update and/or view the Sales Opportunity.

Keyword Search:

Lookup Results: Click the Contact name for Contact details

Contact	Company	Forecast Close	Status	Stage	Product Categories	Amount
<input type="checkbox"/> John James	XYZ Tool	10/28/2016	Open	Solution Presentation	HPS; Laptop	\$2,000.00
<input type="checkbox"/> Jim Anderson	Lafayette Golf Course	10/28/2016	Open	Needs Analysis	2 way radio; LED	\$1,500.00

Showing 1-2 of 2

Click the magnifying glass to get a Lookup List of your Contacts. You can then easily scroll through your Contacts with Open Opportunities.

Note: You can use the Sales Lookup view to search on any Sales Opportunity by a field on the Sales Opportunity or Contact field. Please refer to the Chapter on Lookups on how to perform searches.

- From the **Reports** on the left Navigation bar, you can run Sales Reports for any status, time frame, stage, etc.

Reports

Sales Reports

Open Opportunities - Sales Pipeline

- [My Open Sales \(Select dates/criteria\) | This Month](#)
- [Open Sales By Salesperson \(Select dates/criteria\) | This Month](#)
- [Open Sales By Stage \(Select dates/criteria\) | This Month](#)
- [Won Sales By Rep \(This Month\)](#)
- [Past Forecast Close](#)

- You can also opt to Request a Report

My Sales Report Wizard

Select a template:

Select users:

Select a date range: Forecast Close ▾ between and

Select criteria:

▾ Not ☐ ☐ ▾ = ▾ ☐ And ☐ Or

▾ Not ☐ ☐ ▾ = ▾ ☐ And ☐ Or

Limit To Lookup: ☐ Save Results To Lookup: ☐

Chapter 6: Lookups

From the Lookup view, you can perform a search to find contacts in your database.

You can search on any field on the Contact record to find the contact (s) that match your search. WiredContact will find all those contacts, and display a list of only those records in your Lookup results.

Lookup Search Fields

The Lookup view is a Lookup Wizard so you can search for Contacts on up to 10 fields. By using more than one field you can narrow your lookup of records easily. You can easily narrow searches by placing a few letters in the input box for the field value.

There are five rows of search columns side by side.

The screenshot displays the 'Lookup Search Fields' interface, which consists of two identical columns of search criteria. Each column has three main sections: 'Search Fields', 'Operator', and 'Insert value you want to search here'. The 'Search Fields' section contains a dropdown menu with options: Company, Last Name, First Name, Contact, and Email. The 'Operator' section contains a dropdown menu with options: Contains, Starts with, and Starts with. The 'Insert value you want to search here' section contains a text input box. Below the search fields, there is a green text box that reads: 'There are 10 search fields. Click the down arrows to select your search fields and operators for your Search. The search fields will "stick" after performing a lookup.'

Search Fields	Operator	Insert value you want to search here
Company	Contains	
Last Name	Starts with	
First Name	Starts with	
Contact	Starts with	
Email	Starts with	

Search Fields	Operator	Insert value you want to search here
ID/Status	Starts with	
Business Type	Starts with	
Last Touch	<=	
Product Categories	Contains	
Zip	Starts with	

There are 10 search fields. Click the down arrows to select your search fields and operators for your Search. The search fields will "stick" after performing a lookup.

For each of the search fields, you can select different fields from your database to display to make it easy to search for records. After each Lookup, the search fields will "stick" so on your next lookup, those fields will be in view.

You can easily modify the search fields by clicking in the search box and selecting the field you want to search on.

Lookup Operators

There are several operators in the Lookup View to help you search for the record(s) that you need.

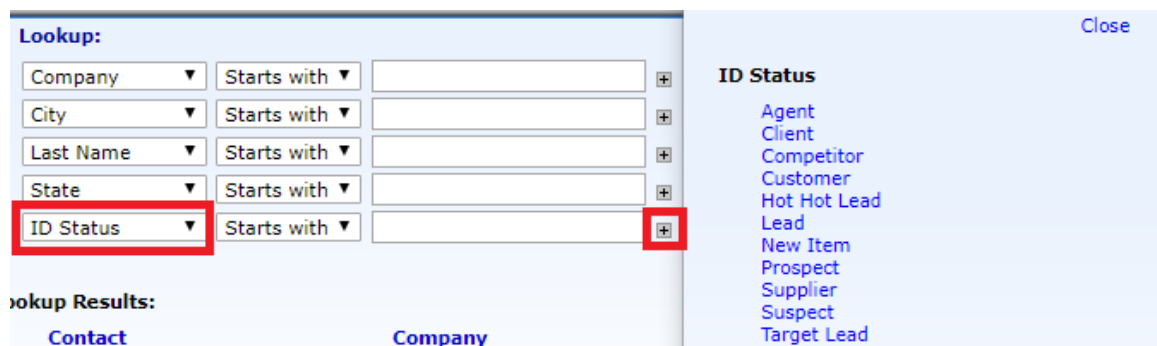
You can change the operators to make your search as broad or narrow as you need.

For example, if you use the operator “Starts with” or “Contains”, then in the value field, if you put in a few letters of the records you want to search, then your Lookup return will be broader and most likely yield more results in your Lookup return.

If you use the operator “equals”, then your search needs to be exact to find the record(s) you want.

Lookup Dropdowns

You will notice that after each field, there is a “+” sign. When you click this button, if the field you are searching for contains dropdown values, a list will appear. This means that you can perform lookups based on fields that have dropdown values without having to type that value in.



The screenshot shows a 'Lookup:' window with five rows of search fields. Each row has a dropdown menu for the field name, a dropdown for the operator (all set to 'Starts with'), and a text input for the value. A red box highlights the 'ID Status' dropdown menu and its corresponding '+' button. To the right of the input fields is a list of 'ID Status' values: Agent, Client, Competitor, Customer, Hot Hot Lead, Lead, New Item, Prospect, Supplier, Suspect, and Target Lead. A 'Close' button is in the top right corner. Below the input fields, the 'Lookup Results:' section shows 'Contact' and 'Company' as results.

Keyword Searches

You can also search on Keywords if you do not know which specific field to find a value. The Lookup results will present the records that match your Keyword from any contact field in the database.

Performing Lookups

You can search for contacts on any field in the database. You may want to search on Company name, or Last Name. Or, you may want to find Contacts with the same value, ie. All the contacts with an ID Status = Prospect.

You can search on up to 10 fields at one time. Below is a sample search to find all the Contacts in your database in a Zipcode that starts with 191 and with a Business Type of "Retail".

Then click the **"Lookup Now"** button:

Best Reach	>=		+
Products	Contains		+
# Employees	Starts with		+
Zip	Starts with	191	+
Business Type	Starts with	Retail	+

Your Lookup results will display below the search fields.

Lookup Results:						
Contact	Company	Phone	Mobile	ID Status	City	
<input type="checkbox"/> Orlando Bloom	Tennis Everyone	215-555-1212		Suspect	Philadelphia	
<input type="checkbox"/> *Steve Brightwell	Pacific Pro Sports	215-555-1212	415-555-6841	Customer	Philadelphia	
Showing 1-2 of 2						
Lookup Selected		Omit Selected				

The Lookup Return will display 25 records on a page. If you have more records in your Lookup result, to see the next page, click "Next" at the bottom of the page.

<input type="checkbox"/>	Taylor Alman			Berkshire Fine Teas, Ltd.
<input type="checkbox"/>	Scott Ashcroft			CH Gormet Imports
Showing 1-25 of 438				Next Last

When there are more than 50 records in your Lookup results, you will see a "Jump" menu appear so you can navigate to a contact in the middle of the Lookup results.

Lookup Results:					
				Jump: [1] [100] [200] [300] [400]	Jump To: >>
Contact	Company	Phone	Mobile	ID/Status	
<input type="checkbox"/> Tom Ashton	Starbucks Coffee, Inc.	214-555-0023			Customer
<input type="checkbox"/> Matt Riley	Steel Manufacturer Company	202-548-9954			Customer

TIP! The default sort of the Lookup results is Company, Last Name. You can also sort on each column header (blue label) to change the sort order.

To go to a Contact Record to see contact details to record a call or add a Sales opportunity, click on the [blue link](#) in the Contact column.

Lookup Results – Exploding Views

In addition to the columns of information that display after a Lookup search, there is more information about a Contact within the Lookup results display.

Click the icon in between the Contact & Company to see more information about this contact in the Lookup results

Click the down arrow at the end of each row to see the last 3 History items, Activities scheduled and Sales Opportunities

Lookup Results:		Contact	Company	Phone	ID/Status	Sales Rep	Store	Last Touch
<input type="checkbox"/>		Susan Clark	ABC Manufacturing	215-555-1212	<input checked="" type="checkbox"/> In-Store Lead	Jennifer Smith	567	7/30/2016 10:06 AM
		Company ABC Manufacturing Contact Susan Clark Title Director of Security Department Operations 215-555-1212 Ext. Phone Mobile Phone Fax Salutation Email	Address 1 Main Street City Philadelphia State PA Zip 19130 Web Site Call Frequency Last Touch 7/30/2016 10:06 AM	Store 567 Sales Rep Jennifer Smith ID/Status In-Store Lead Customer # Business Type Manufacturing Create Time 9/30/2016 9:59 AM Edit Time 10/7/2016 1:09 PM				
<input type="checkbox"/>		Tom Johnson	Ed's Truck Sales	303-548-5544	<input checked="" type="checkbox"/> In-Store Lead	Jennifer Smith	567	9/29/2016 9:45 AM

There is a down arrow at the end of each row in the Lookup results. When you click on it, you will see icons for History, Activities and Sales.



When you click on the Sales icon (register), the last 3 Sales opportunities appear in view in the Lookup results.

<input type="checkbox"/>			*Jim Anderson	Lafayette Golf Course	215-999-8754		Customer	Jennifer Smith	567	10/12/2016 12:28 PM																																													
<table><tr><th>Status</th><th>Close Date</th><th>Forecast Close</th><th>Stage</th><th>Prob %</th><th>Categories</th><th>Amount</th><th>GM %</th><th>Gross Margin</th><th>Sales Rep</th><th>Proposal</th></tr><tr><td></td><td>Open</td><td>10/28/2016</td><td>Solution Presentation</td><td>75%</td><td>2 way radio; LED</td><td>\$1,500.00</td><td>25%</td><td>\$375.00</td><td>Jennifer Smith</td><td>Test Proposal.pdf</td></tr><tr><td></td><td>Won</td><td>9/29/2016</td><td>10/14/2016</td><td>Completed Won</td><td>100%</td><td>Fixtures; Laptop</td><td>\$3,000.00</td><td>25%</td><td>\$750.00</td><td>Jennifer Smith</td></tr><tr><td></td><td>Lost</td><td>9/29/2016</td><td>10/13/2016</td><td>Completed Lost</td><td>0%</td><td>Consumer Rechargeable</td><td>\$2,500.00</td><td>20%</td><td>\$500.00</td><td>BPB CRM Admin</td></tr></table>												Status	Close Date	Forecast Close	Stage	Prob %	Categories	Amount	GM %	Gross Margin	Sales Rep	Proposal		Open	10/28/2016	Solution Presentation	75%	2 way radio; LED	\$1,500.00	25%	\$375.00	Jennifer Smith	Test Proposal.pdf		Won	9/29/2016	10/14/2016	Completed Won	100%	Fixtures; Laptop	\$3,000.00	25%	\$750.00	Jennifer Smith		Lost	9/29/2016	10/13/2016	Completed Lost	0%	Consumer Rechargeable	\$2,500.00	20%	\$500.00	BPB CRM Admin
Status	Close Date	Forecast Close	Stage	Prob %	Categories	Amount	GM %	Gross Margin	Sales Rep	Proposal																																													
	Open	10/28/2016	Solution Presentation	75%	2 way radio; LED	\$1,500.00	25%	\$375.00	Jennifer Smith	Test Proposal.pdf																																													
	Won	9/29/2016	10/14/2016	Completed Won	100%	Fixtures; Laptop	\$3,000.00	25%	\$750.00	Jennifer Smith																																													
	Lost	9/29/2016	10/13/2016	Completed Lost	0%	Consumer Rechargeable	\$2,500.00	20%	\$500.00	BPB CRM Admin																																													
<input type="checkbox"/>			Dan Jones	Lafayette Golf Course	215-999-8754		Customer	BPB CRM Admin	567	10/3/2016 5:50 PM																																													
<input type="checkbox"/>			Karen Monroe	Monroe Truck Sales			Omni Lead	Dave Adams	123	8/29/2016 4:44 PM																																													

Within the Lookup results, you can see Sales Opportunity information about this contact

To close the additional information in view, click on the up arrow in the right column.

Short Cut Lookups

On the Lookup Toolbar, there are icons that represent Lookups so you can easily access records. By clicking once on an icon provided, you can Lookup the records where you are assigned as the Sales Rep, and also see contacts that have recently been added to the database.



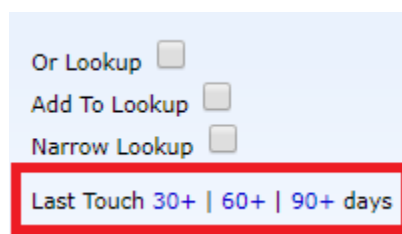
My Contacts – all the records where the “Sales Rep” is assigned to the logged in user.



Recent Contacts – all contacts that have been added or contact fields that have updated in the database for the past 10 days, displayed in descending date order

Last Touch: 30+ | 60+ | 90+ days – click on each of the numbers to see a list of the contacts that have not been called on in the last 30, 60 or 90 days respectively.

NOTE: These links omit the ID/Status of “Dead Lead”.



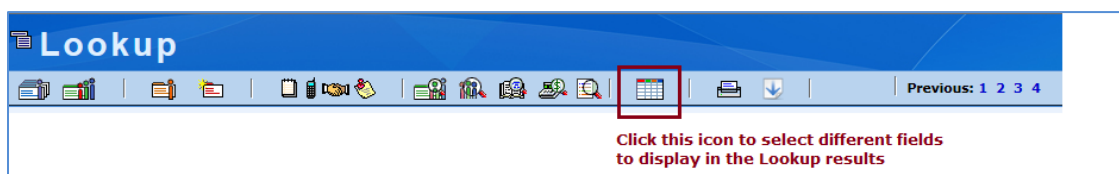
Lookup All


The Lookup All feature is a User permission. If enabled, this function allows you to lookup all of the records in your database. Click on the “Lookup Now” button without any values in the search fields and you will see a list of all your records.

Lookup Now

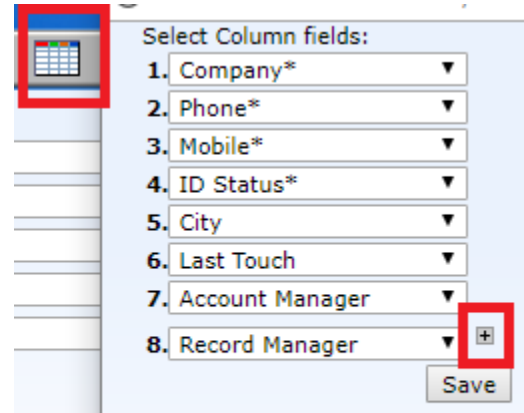
If you do not see any records returned after clicking this button, this feature is not enabled for you.

Changing the Column Display of the Lookup Results



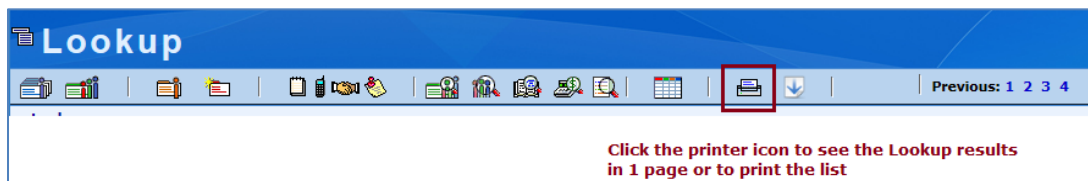
You can modify the columns that appear in the Lookup Results by clicking the  icon in the Lookup Toolbar.

1. Click on the Grid icon and the dialog appears with the Column field labels currently in view. The default fields are indicated with a *.
2. Click the down arrow of the column that you want to change and select a new field to display.
3. Click the save button. Your Lookup results will reflect your new columns selected.



Click the + sign to add new columns to your Lookup results

Printing Lookup Results



You can print the Lookup display list in user-friendly text by clicking the Print icon. It will print all of the items in the Lookup, not just the ones on the first page.



Updating Records in the Lookup Results List

You can update records in the Lookup Results list by simply placing your cursor in the field to update it. A solid blue box will appear indicating that you can edit that field. Changes made to the list are saved to the database automatically.

1. For example, put your cursor in the "Company" field for a record. Notice the blue solid box appears.
2. Change or update the Company name. The Company name has been changed and automatically saved on the Contact record.



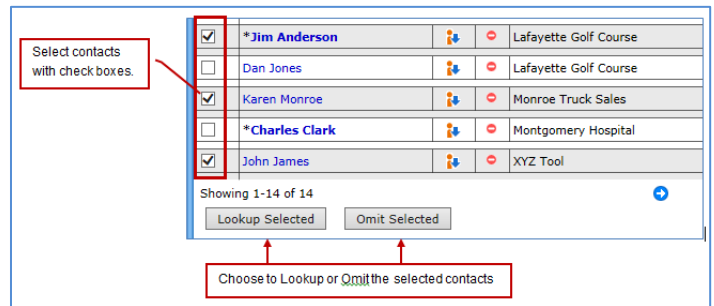
You can edit Contact records in-line from the Lookup results. Place your cursor in a fields to modify a value.

Note: If the blue solid box does not appear in the field when you try to modify it, you do not have permission to edit that field.

Tagging to Refine Your Search

Once you have performed a lookup, you can refine your search by selecting contacts within the contact summary and choosing to Lookup or Omit the tagged items.

The "Lookup Selected" and "Omit Selected" buttons appear at the bottom of the Lookup Results screen and is directly related to the checkboxes that appear to the left of each entry.

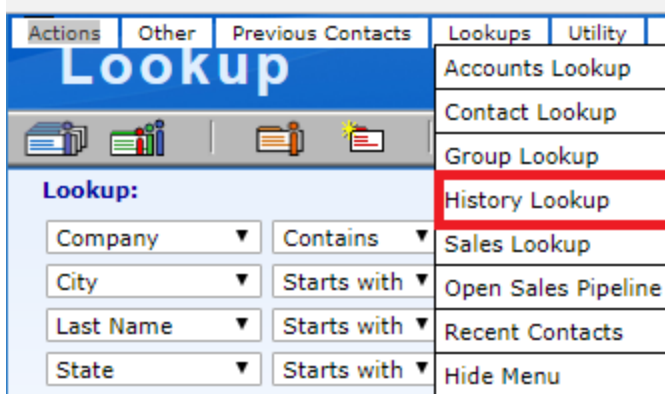


Exporting information from the Lookup Results

After you perform a Lookup, you can export the columns and information you see in your Lookup Results to a CSV (excel) format.



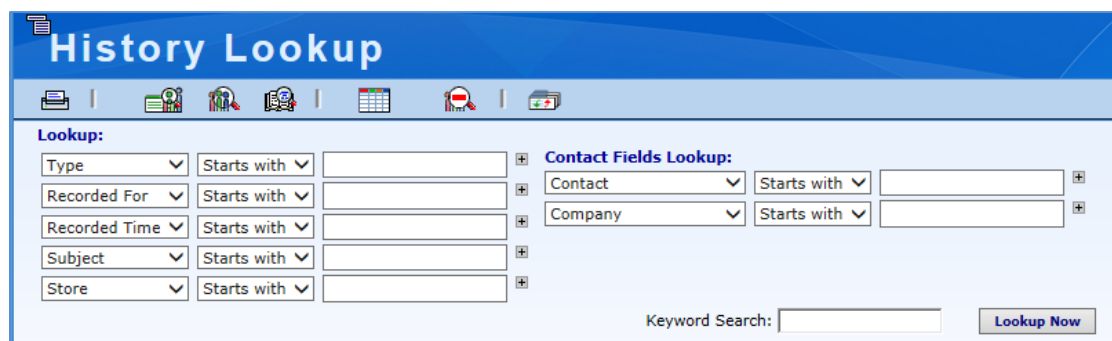
Sales, History & Activity Lookups



The screenshot shows a software interface with a top navigation bar containing 'Actions', 'Other', 'Previous Contacts', 'Lookups', and 'Utility'. Below this is a large blue header with the word 'Lookup' in white. Underneath the header is a toolbar with icons for a folder, a list of people, a calendar, and a document. The main area is divided into two sections. On the left, under the heading 'Lookup:', there are four rows of search criteria, each with a dropdown menu and a 'Starts with' dropdown: 'Company', 'City', 'Last Name', and 'State'. On the right, there is a vertical list of lookup options: 'Accounts Lookup', 'Contact Lookup', 'Group Lookup', 'History Lookup' (which is highlighted with a red box), 'Sales Lookup', 'Open Sales Pipeline', 'Recent Contacts', and 'Hide Menu'.

In addition to the Contact Lookup, you can perform Sales Lookups, History Lookups and Activity Lookups. You can easily go to those views from the Lookup Menu option.

For example, when you click on “History Lookup”, you will be presented with a Lookup view that contains fields to search on from the History table.




The screenshot shows the 'History Lookup' search interface. It has a blue header with the title 'History Lookup' and a toolbar with icons for a printer, a list of people, a calendar, a document, a magnifying glass, and a folder. Below the header is a section titled 'Lookup:' with five rows of search criteria, each with a dropdown menu and a 'Starts with' dropdown: 'Type', 'Recorded For', 'Recorded Time', 'Subject', and 'Store'. To the right of this section is a section titled 'Contact Fields Lookup:' with two rows of search criteria, each with a dropdown menu and a 'Starts with' dropdown: 'Contact' and 'Company'. At the bottom right, there is a 'Keyword Search:' text box and a 'Lookup Now' button.

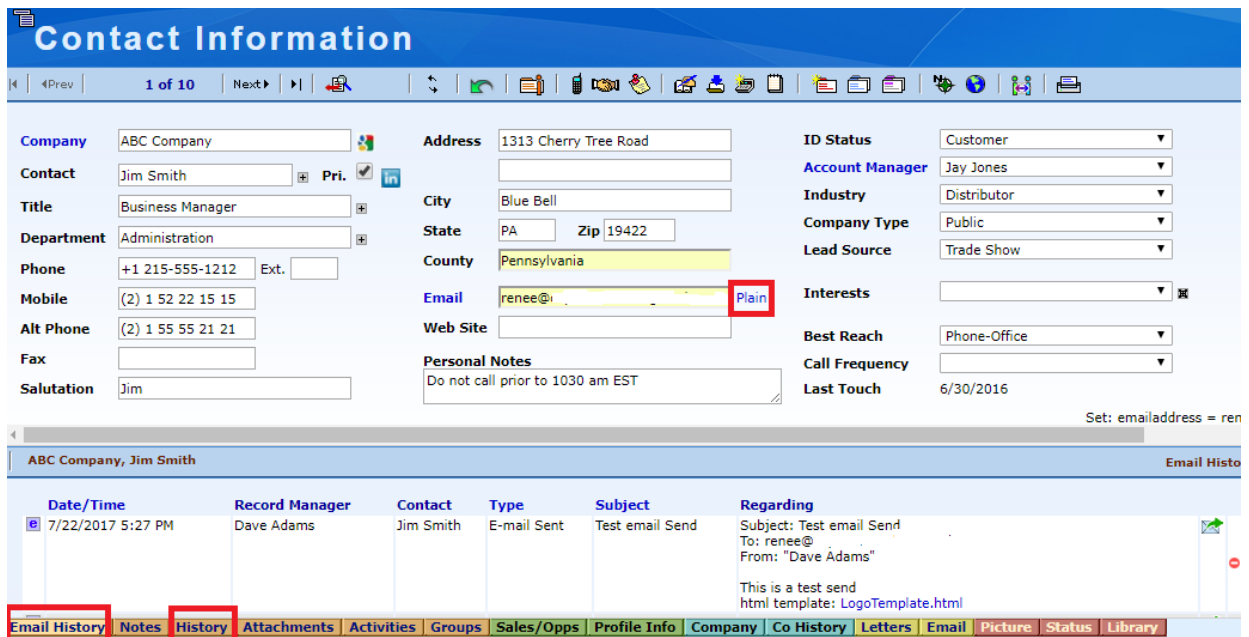
This is helpful if you are searching for a specific History Type or a specific note. From the Lookup results, you can go directly to a contact.

Chapter 7: Recording E-mails Received or Sent

Recording E-Mail Sent or Received

- If you want to record an E-mail **sent** OR received from your E-mail client to the contact's history, then you can copy the message and add a new Record to History  item for that Contact. Select the appropriate "Type" from the dropdown.

There is a link on the Contact View called "Plain" to easily send an email message and have it recorded to the Email History and the History tabs.



Date/Time	Record Manager	Contact	Type	Subject	Regarding
7/22/2017 5:27 PM	Dave Adams	Jim Smith	E-mail Sent	Test email Send	Subject: Test email Send To: renee@ From: "Dave Adams" This is a test send html template: LogoTemplate.html

Note: *WiredContact has outgoing e-mail capabilities as well as integration with Outlook.*

Chapter 8: Reports

WiredContact comes with a number of default reports on several different levels including Sales, Histories, Contacts and Activities. In addition, you can customize the existing reports or create your own report using the WiredContact Wizard tool.

The Reports feature allows you to either run pre-defined reports or create your own custom reports. Whichever you choose, you get the information you need in real-time, up-to-date documentation.

The WiredContact Reports automatically link to the Contact or Sales Opportunity so you can easily go to the contact record for instant updating or viewing. This feature makes your reports interactive so the reports become actionable.

The Report links below and report Wizards allow you to run reports whenever you want.

Reports

Sales Reports

- Open Opportunities - Sales Pipeline
- My Open Sales (Select dates/criteria) | This Month
- Open Sales By Salesperson (Select dates/criteria) | This Month
- Open Sales By Stage (Select dates/criteria) | This Month
- Won Sales By Rep (This Month)
- Past Forecast Close

Contact Reports

- Contact List (Lookup)
- Current Contact
- Complete Contact Report (Lookup)

History Reports

- History By Record Manager
- History by Record Manager (select dates)
- History List - Next Activity (select dates)
- History By Record Manager - 7/22/2017
- History By Record Manager This Week
- History By Record Manager This Month
- History By Record Manager Last Week
- My History (select dates)
- History Summary (#'s) - This Month
- History By Company
- History by Company (select dates)
- History By Company - 7/22/2017
- History By Company This Week

Activity Reports

- Open Activities By Record Manager
- Activity by Record Manager (select dates)
- Activities By Record Manager - 7/22/2017
- Activities By Record Manager - This Week
- Activities By Record Manager - This Month
- Activities By Record Manager - Last Week (not cleared)
- Activity Summary (#'s) - This Month
- Open Activities By Company
- Activities by Company (select dates)
- Activities By Company - 7/22/2017
- Activities By Company This Week
- Activities By Company This Month
- Activities By Company Last Week

After a report is generated, it is saved in your **Personal Library/Reports** folder.

Exporting Information from WiredContact

The Report Wizards have export templates so you can export Contact, Leads, Sales, History and Activity information.

If you would like to Export information from WiredContact, please email support@wiredcontact.com for the Exporting User Guide.

Chapter 9: Libraries

When requesting a report, the results will display on the screen if you have your browser Pop-Ups enabled for your WiredContact site.

Regardless if your browser Pop-Up is enabled, all the Reports will be stored in your **Libraries > Personal Library > Reports** so you can see it:

- Go to the Library icon on the side bar > Personal Library > Reports.
- To see a list of the reports, click on the double arrow “List View” icon to the right to display the Reports in date or alpha order.
- To see the report, click on the Up arrow to the left of the Report name.



NOTE: If you run the same report more than 5 times, the report names will overwrite. So if you want to keep a report for an extended period of time, it is recommended to rename the report name. Simply type in a new name in the solid blue box.

Chapter 10: Support

If you need further assistance, please contact the WiredContact Support Team at Support@wiredcontact.com

When sending an email, please describe your issue in detail. One of our Tech Support team members will respond promptly and may request a Remote Desktop session to see more details about your issue.