WiredContact User Guide

Version 2017-0722

WiredContact
User Guide – The Basics

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

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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):

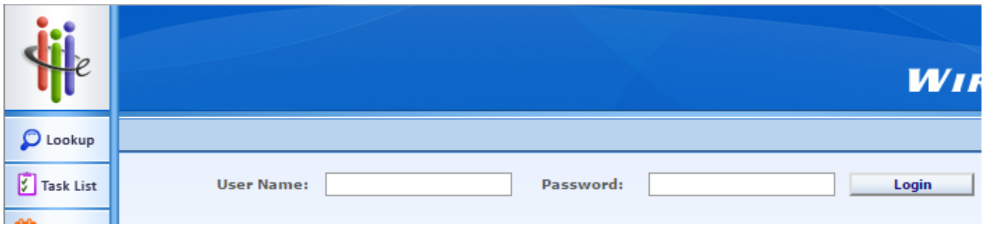
Internet Explorer: http://www.wiredcontact.com/wcemedia/iesettings.html

Chrome: http://www.wiredcontact.com/wcemedia/chromesettings.html

FireFox: http://www.wiredcontact.com/wcemedia/firefoxsettings.html

Logging In

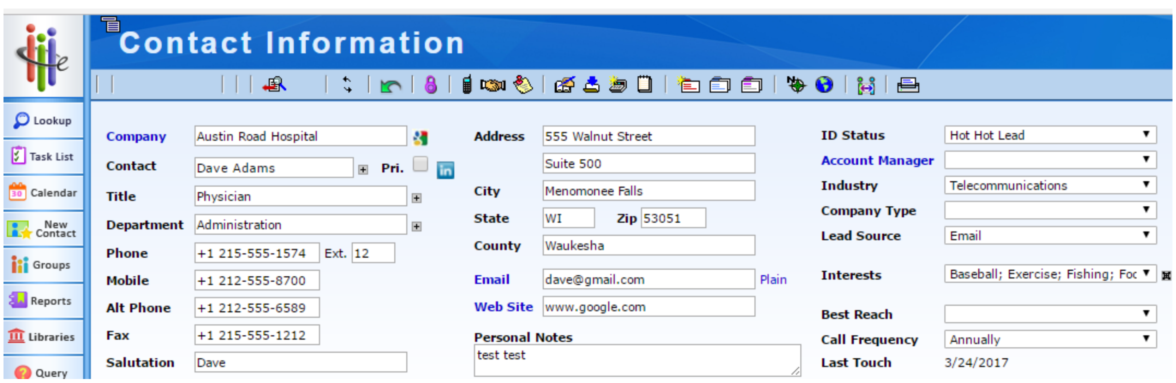
1. In the User Name box, type your **User Name**.



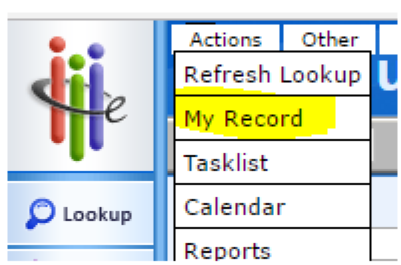
2. Type your Password. **Your Password is cAse SenSitiVe**.

   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.

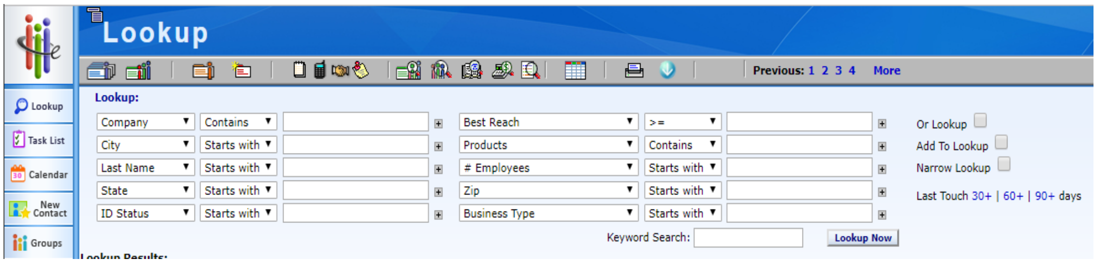


If your page did not open to your "**My Record**", click the Menu icon above the title and select "My Record".

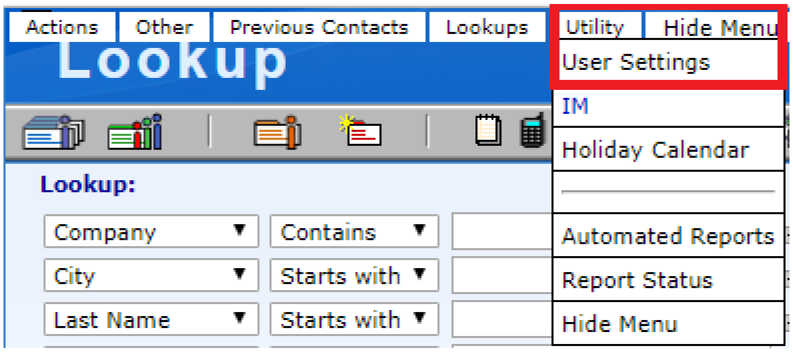


If you need to access it in the future, follow the directions here:
www.wiredcontact.com/Docs/UpdatingYour_MyRecord.pdf

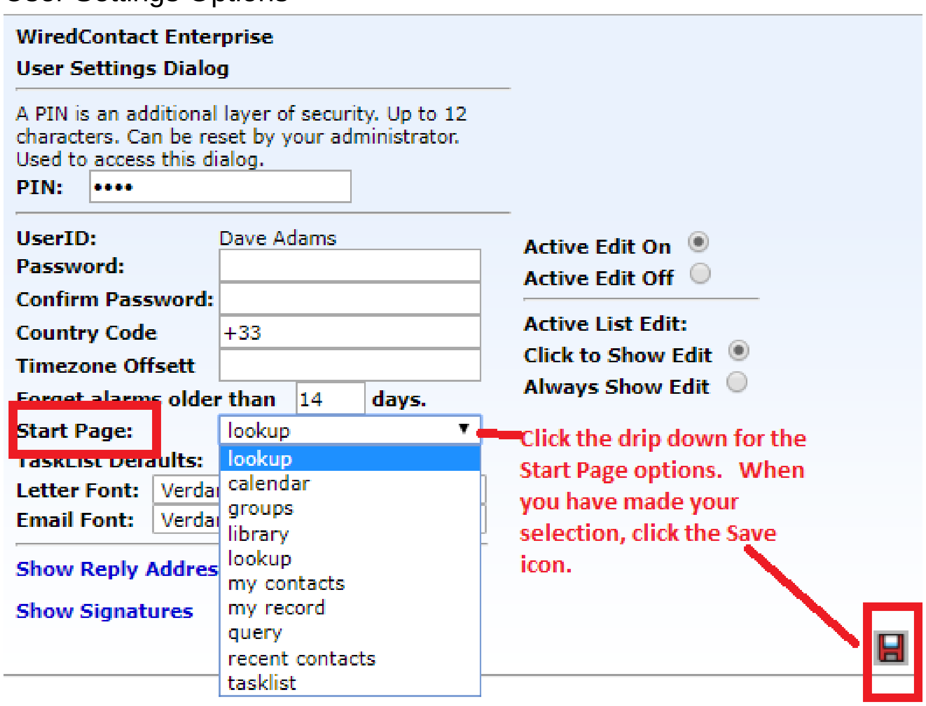
4. For all future logins, your default start page will be the **Lookup screen**. The Lookup view allows you start looking up specific contacts within the database. This Guide will detail this Lookup screen in future Chapters.



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



   b. User Settings Options

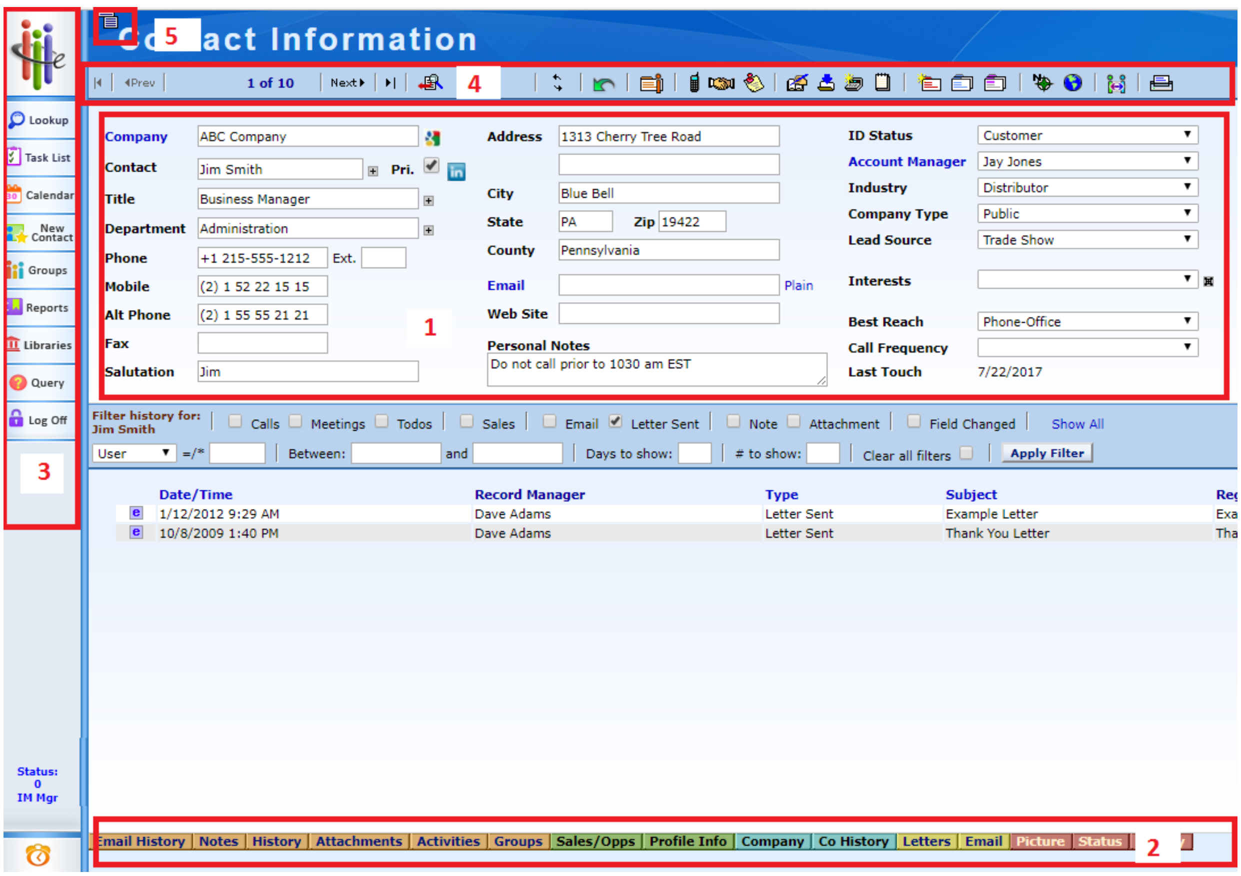


Chapter 2: Understanding the WiredContact Layout

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.



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

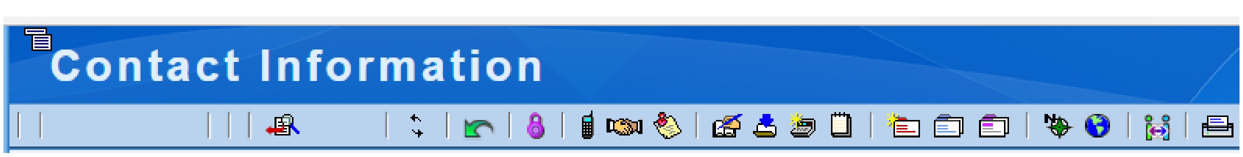
3. **Side Bar** icons take you to different views within WiredContact.
4. **Contact Tool bar –** displays icons that are used to take action (schedule a call, record a meeting, etc.) with the contact you are on.
5. **Top Menu –** use the top show/hide menu (click the icon above every title page) to navigate 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:

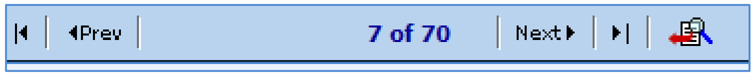
- If you see a "**+**" sign to the right of the field, you can select a value from the dropdown list.
- If you see an "**x**" sign to the right of the field, you can select multiple values for that field.
- If you are not able to type directly into a field, that means you can only select values in the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

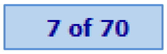
The Contact Toolbar



Toolbar Navigator

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

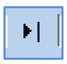




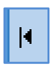
Counter – Shows the total number of contacts in the lookup, and which contact you are currently viewing.

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

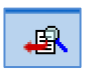
Previous – Brings you to the previous contact in the lookup.



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

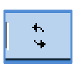


First – Brings you to the first contact in the lookup.



Return to Lookup – Returns you to the Lookup Screen.

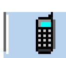
Static Toolbar



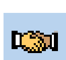
Refresh - Refreshes your screen for the most up-to-date information.

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 an also use the big “Add Sales Opportunity” button from the Contact view.

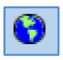
Add Note – create a new Note for this contact.

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”.

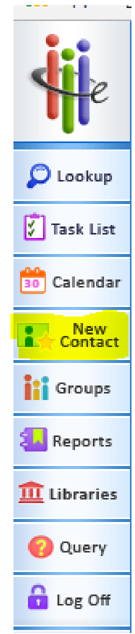


Maps - Gives you a map of the current contact’s address.

Merge – Merge duplicate contacts.

Print – Send a report to print the contact screen.

Add a New Contact

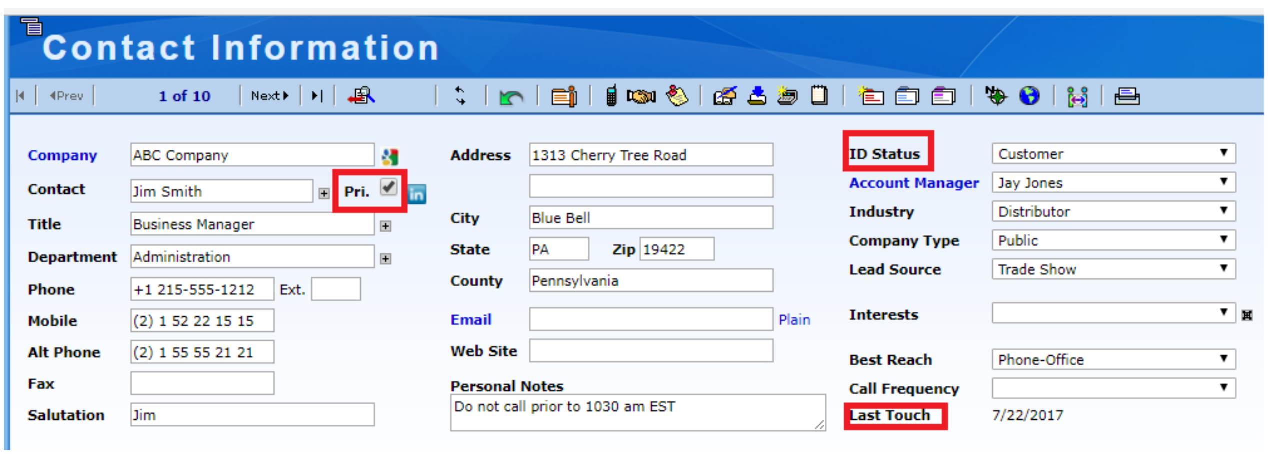


First, perform a search (see Chapter 7 - Lookups) to see whether that contact is already in the database. If that contact is not in the database, you can add a new contact by clicking on the "New Contact" icon on the sidebar.

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).

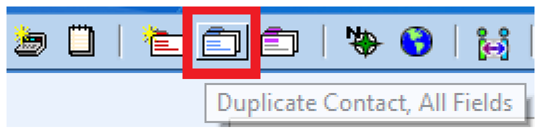
c) **ID/Status** – indicates what type of a contact this person is. This is helpful when you are searching for all your leads or your Customers.
NOTE: When the ID/Status field changes, it is recorded into the History tab.

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

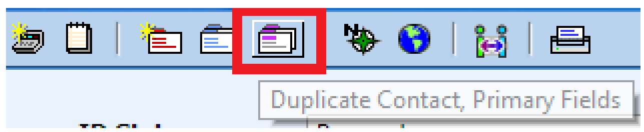
Duplicate a Contact at the Same Company

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.

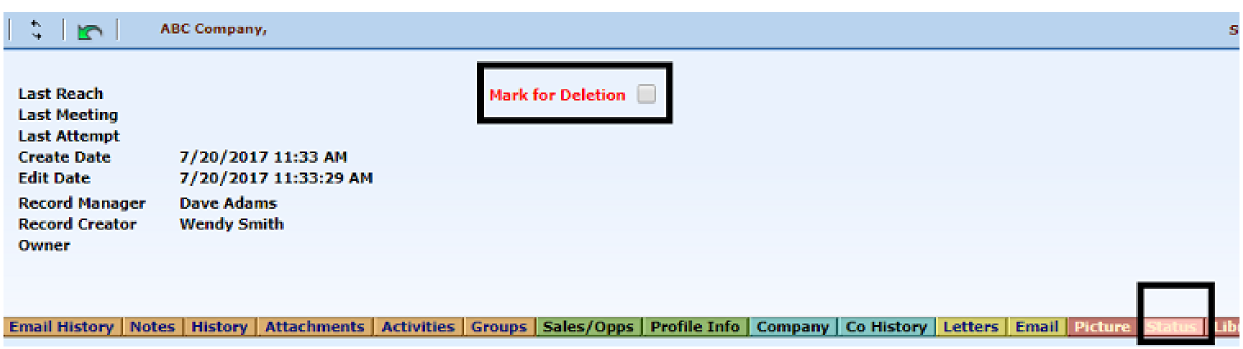
George Brown	ABC Company		
*John Cellini	ABC Company	Chairman	+1 610-909-2207
Renee Cronin	ABC Company		
John Davis	ABC Company	Sales Manager	+1 215-555-1212
Jane Doe	ABC Company		
Tom Gallagher	ABC Company	Operations Manager	+1 760-555-1234
Olen Hancock	ABC Company	Operations Manager	+1 760-555-1234
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	

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

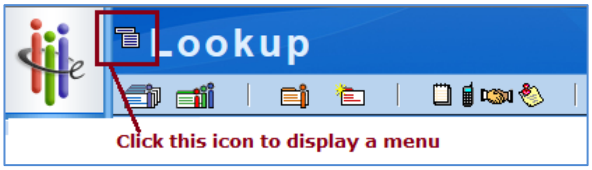
If you want to delete a contact, go to the **Status** tab. Checkbox the field called “Mark for Deletion”.



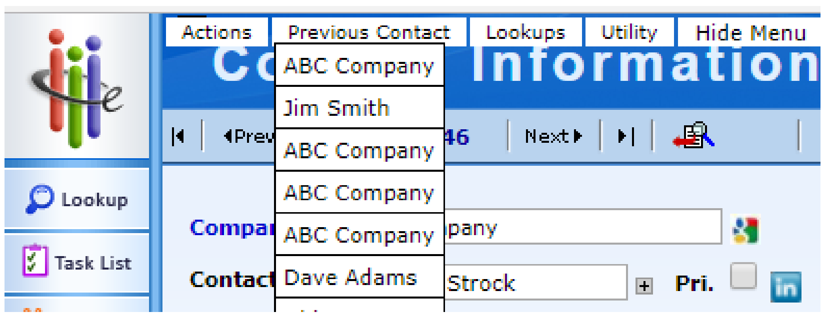
Records “**Marked for Deletion**” will be purged on a regular basis by the Administrator.

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.

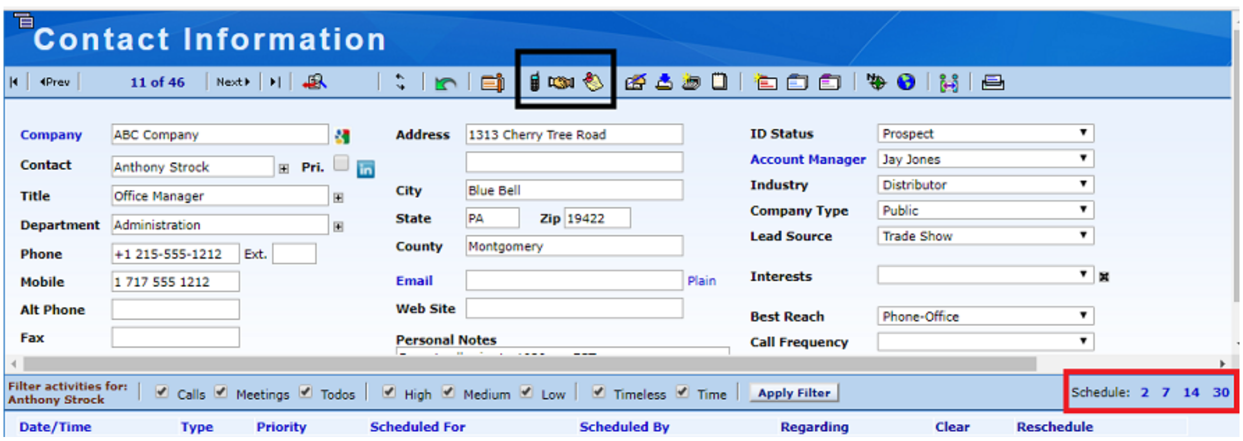
In WiredContact, activities need to be cleared (clearing an activity may also be referred to as completing an activity).

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)

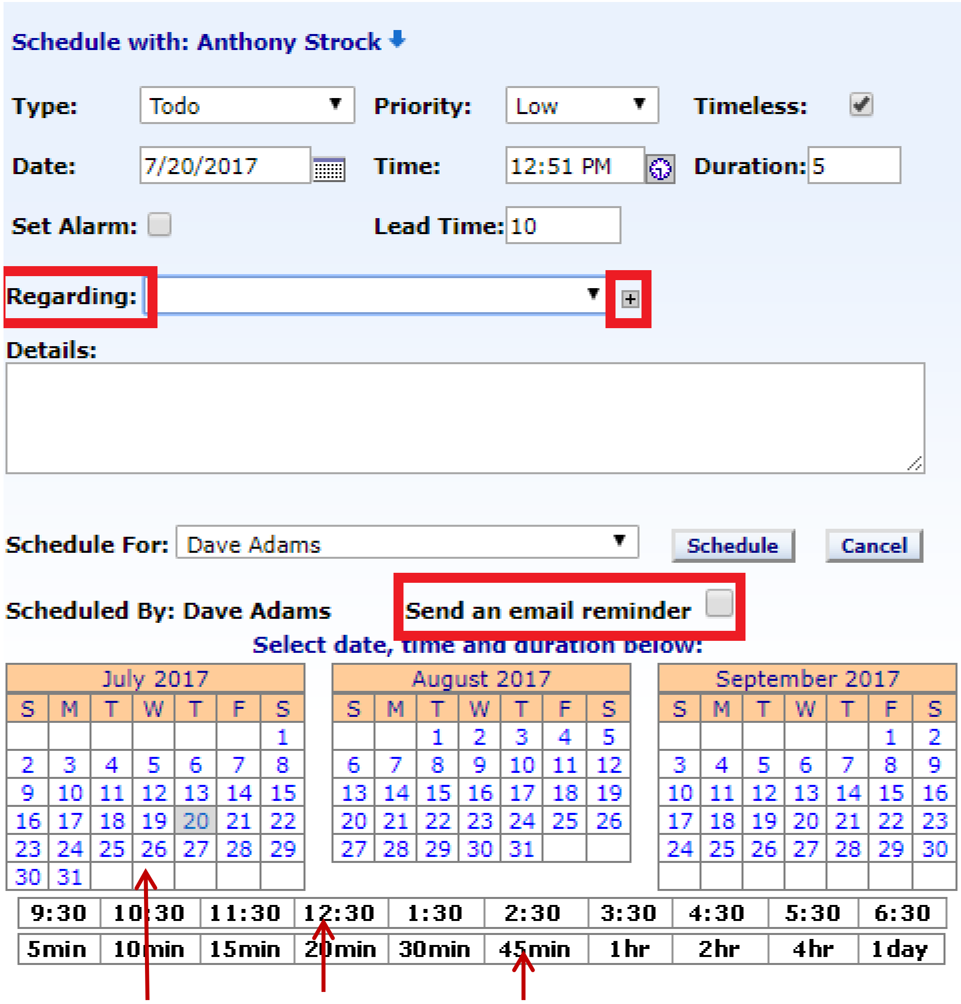


.

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.

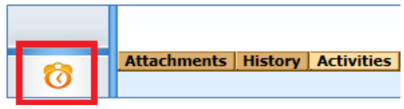


Point and Click shortcuts for Date, Time and Duration.

4. 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.

5. If you would like an email reminder prior to the activity, click on the respective timeframe to receive your email alarm.

6. 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).

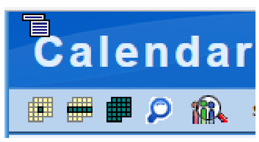


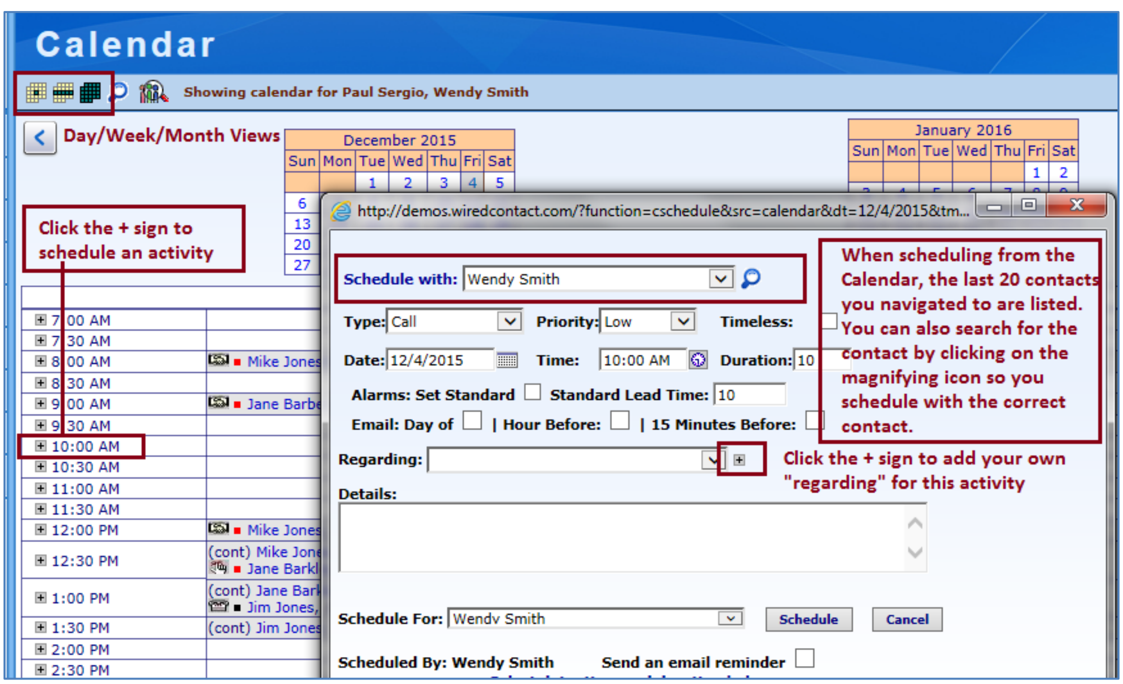
7. This Activity will then appear on your Task List, Calendar and Activity tab for that Contact.

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.

1. Choose your Calendar view: Daily, Week or Month, and who’s Calendars you wish to see:





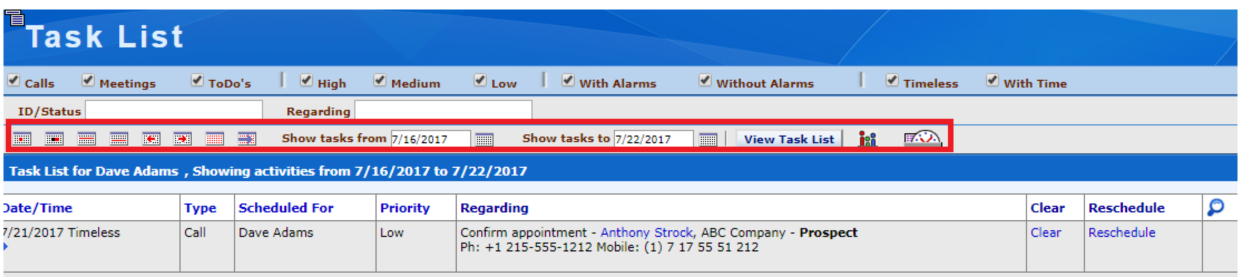
> ***TIP!**.To schedule an all-day event, under “duration”, type in the number of hours you want to block off with an “h” after it. For example, 8H. This will block off the next 8 hours.*

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.



Using the Task List

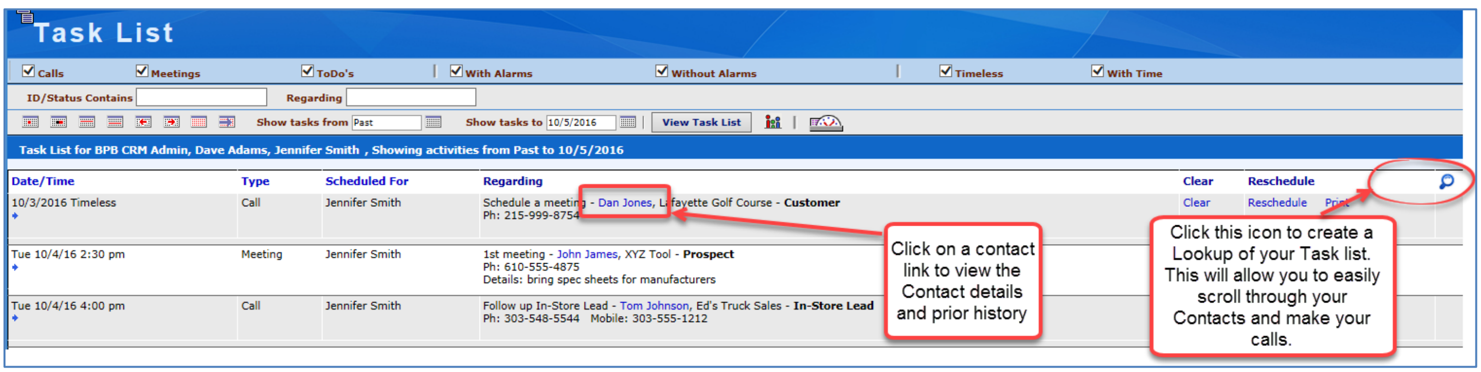
Prior to performing your scheduled Activity, you can easily review notes from previous interactions with this contact and view other pertinent information that is stored on the Contact record.

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.



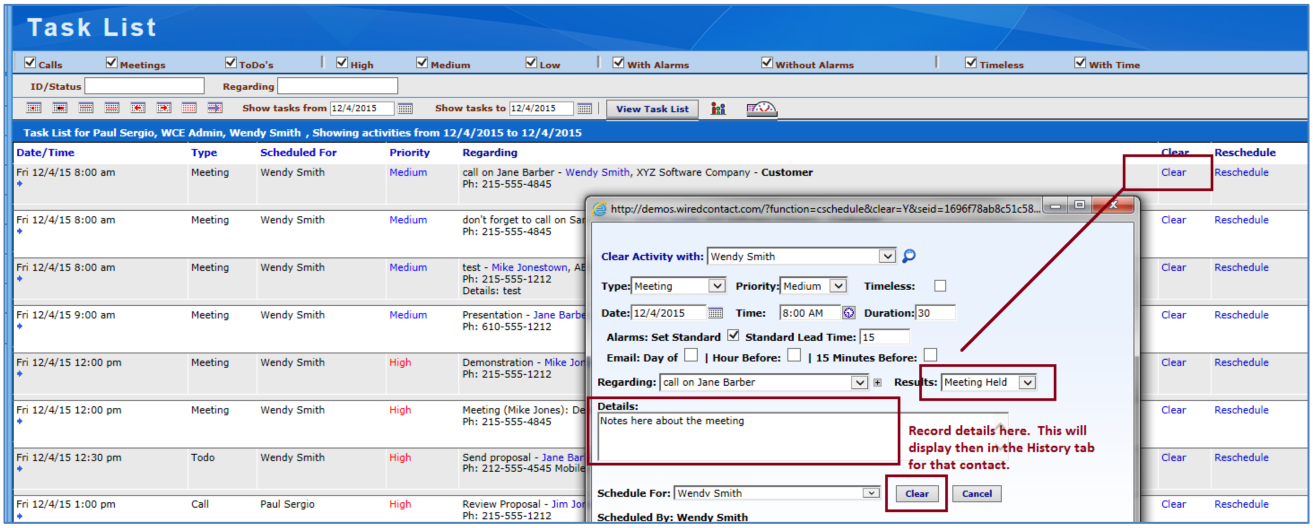
Clearing (Completing) Activities

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.

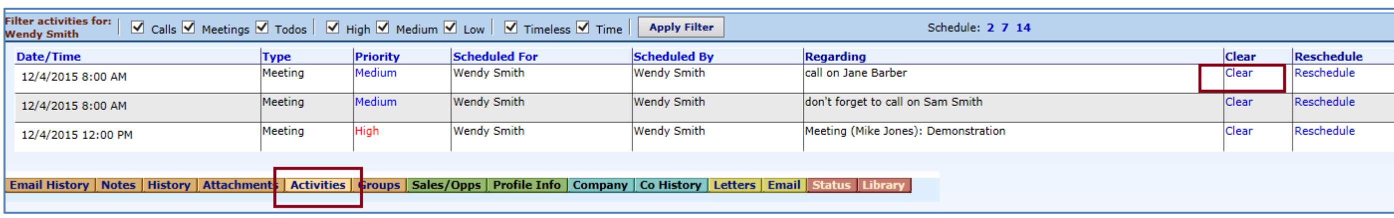
NOTE: When "clearing" an activity, you are recording details of the interaction in the "details" section. Those notes will automatically be listed on the History tab for that Contact.

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

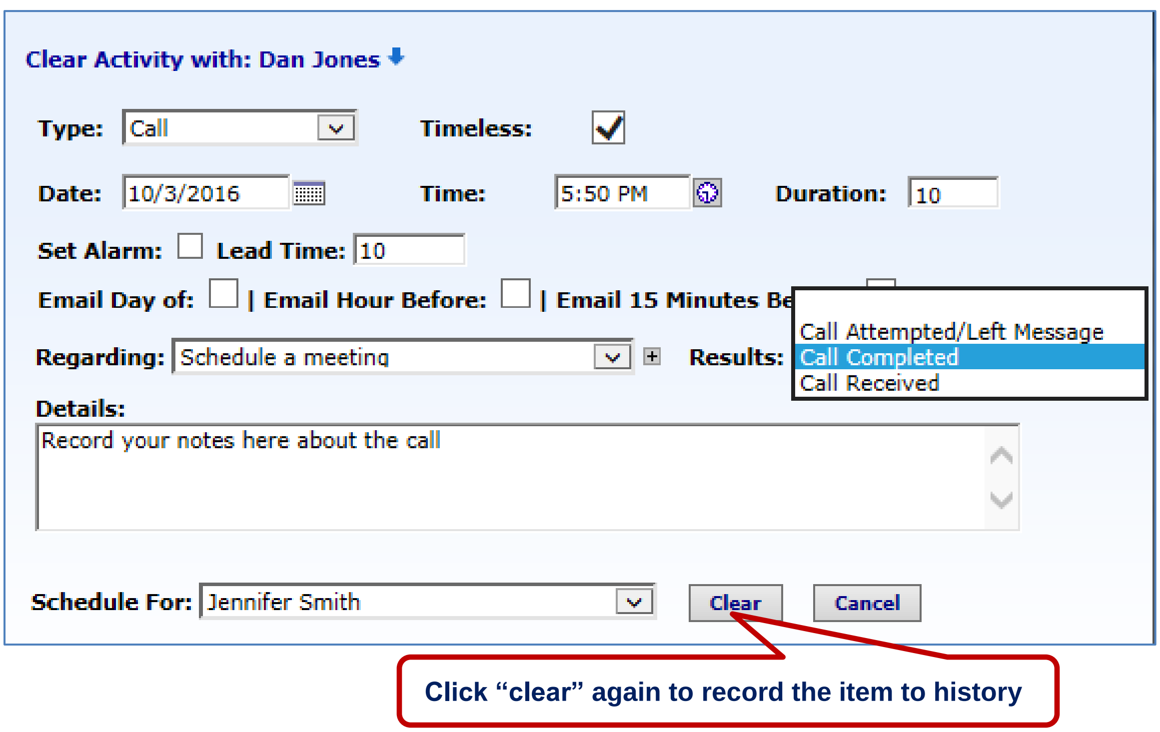
Clearing an Activity from the Task List – Click “Clear”



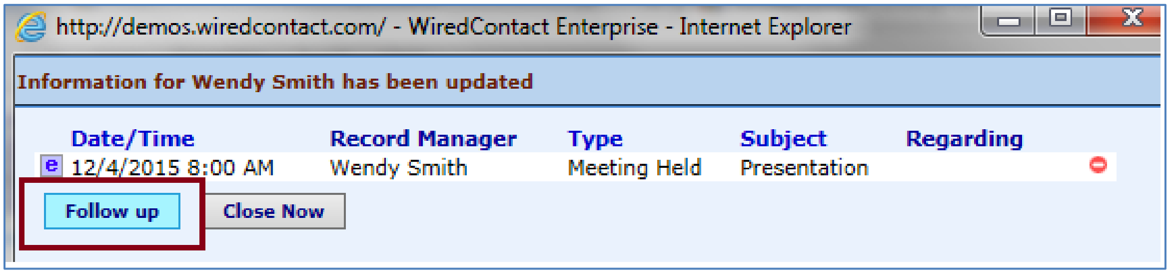
Clearing an Activity from the Activity tab when on a Contact – click “Clear”



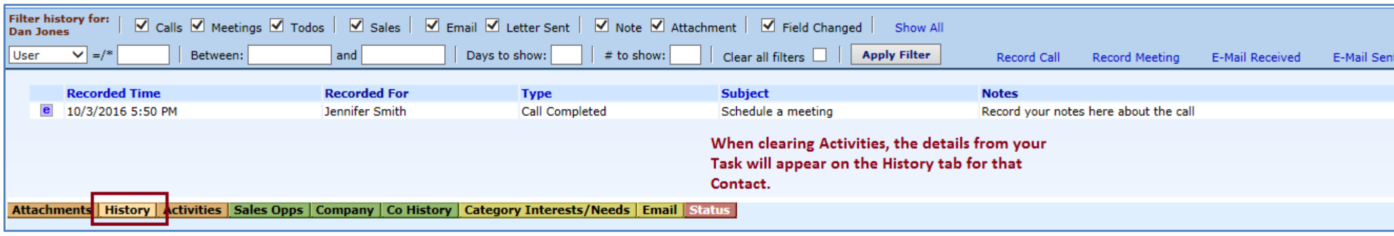
When you click on “**Clear**”, you are presented with a dialog box to record the result of the Activity and add details about what happened during your conversation or meeting.



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

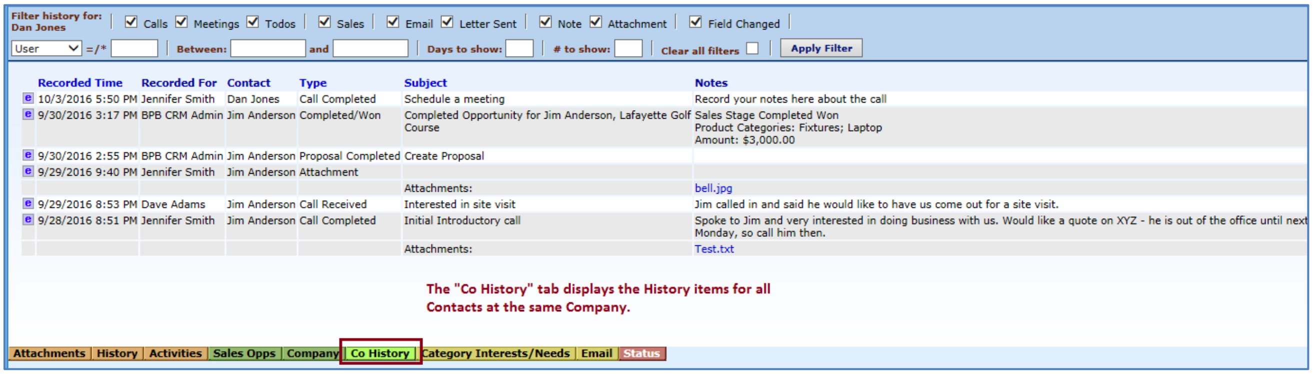


When clearing (recording) an Activity, the Task details and results will appear on the History Tab for that Contact.



Co History Tab

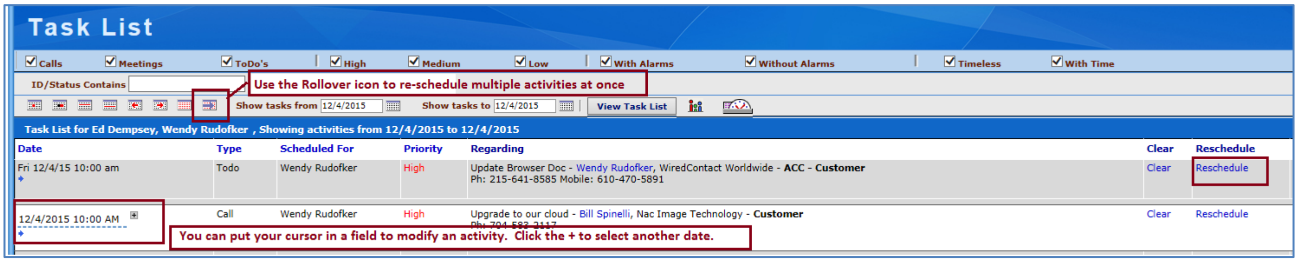
The Company history tab displays the history items (cleared activities) for all Contacts at the same Company.



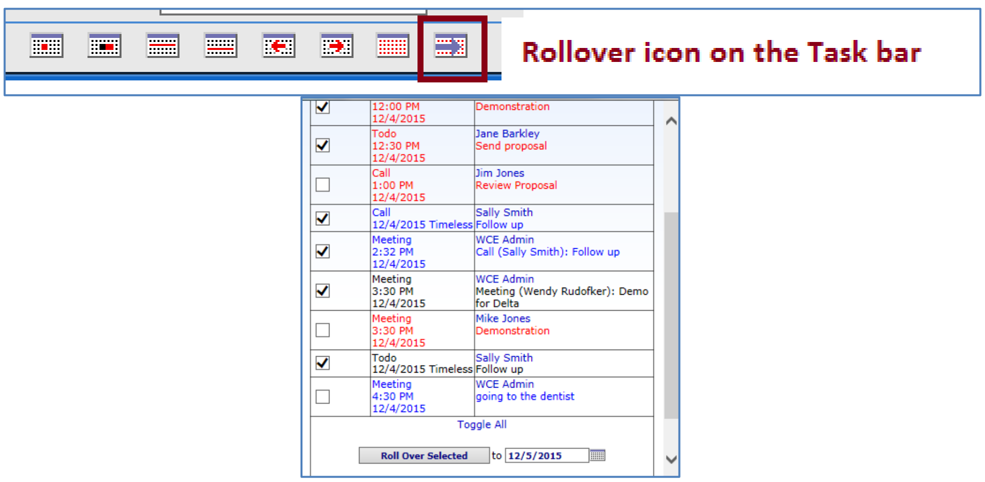
Rescheduling Activities

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.



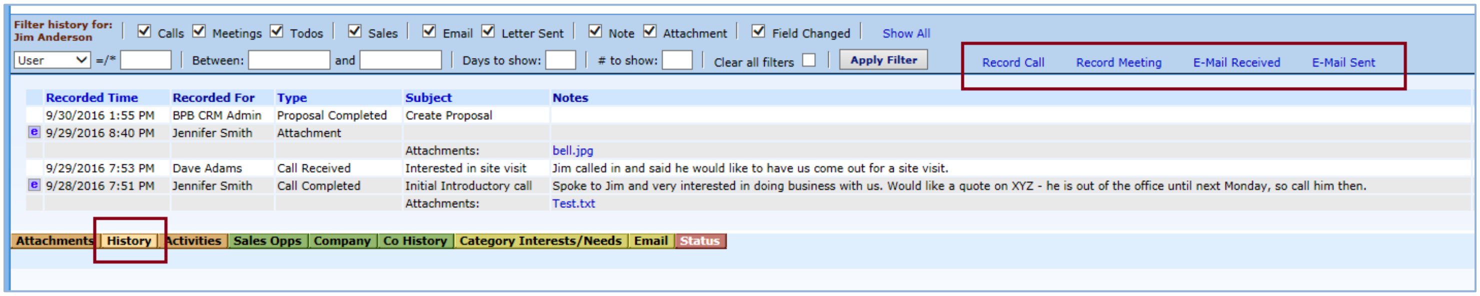
When you click the **Rollover** icon, you can select which activities you want to reschedule by using the checkboxes to the left of the activity, then select your desired date to rollover the activities.



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 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.



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.

Chapter 5: Managing Sales Opportunities

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

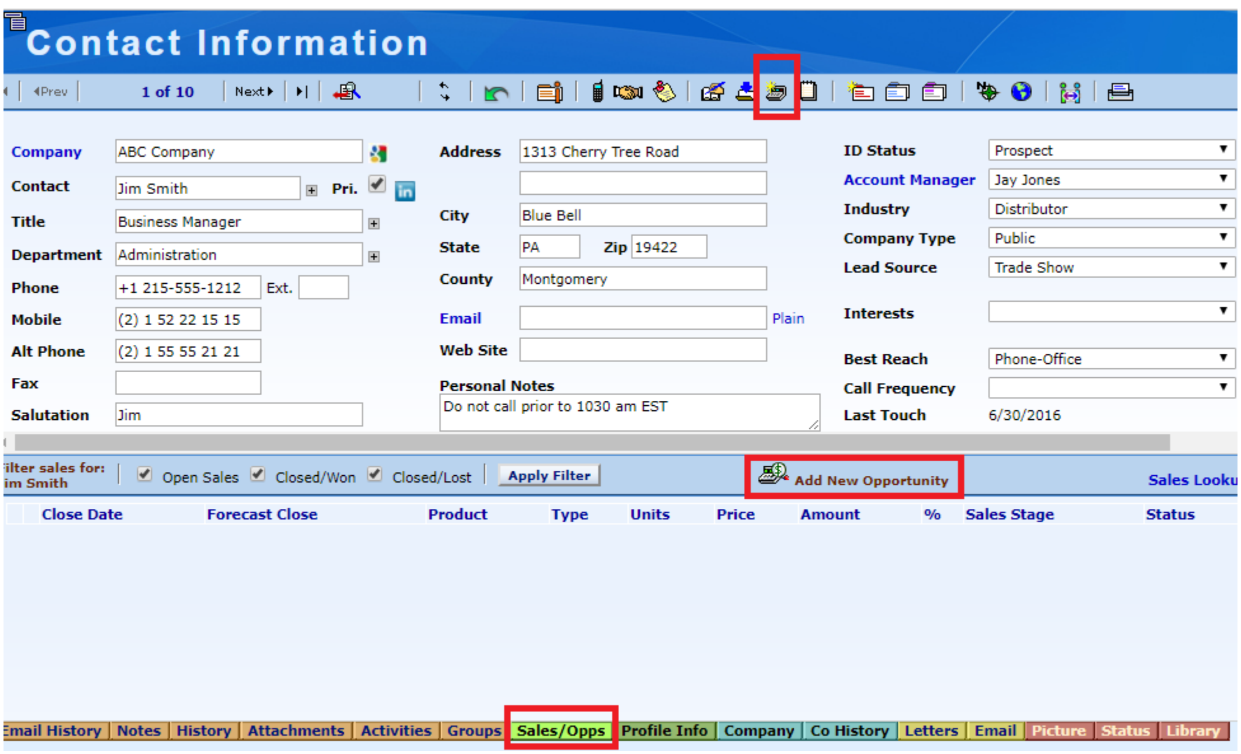
The sales opportunity includes the Product category, Sales Stage, probability of winning the sale, Amount and Gross Margin of the sale, and the anticipated Forecast Close date for each one.

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

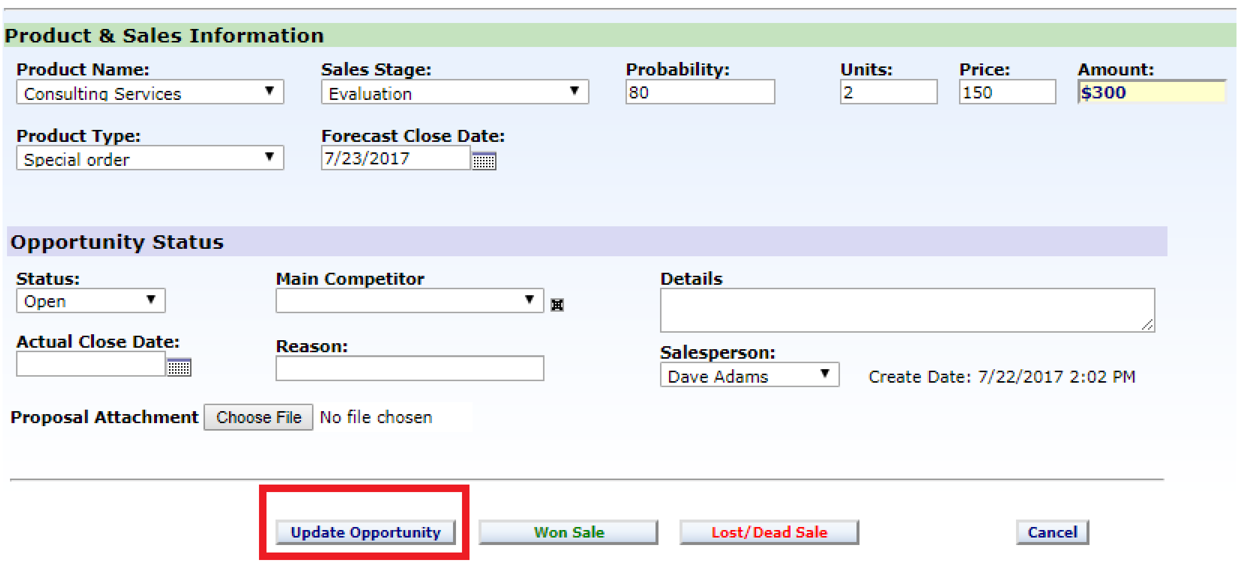
To add a new opportunity for a Contact, click the "**Create New Sales/ Opportunity**" icon on the Contact shortcut view.

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

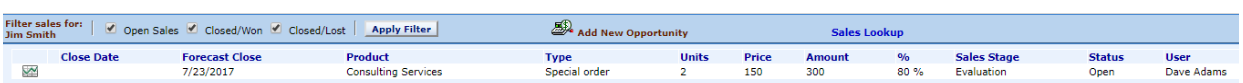


All new Sales Opportunities are created with a **Status = Open**. Complete the rest of the Sales Opportunity information:

- 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.



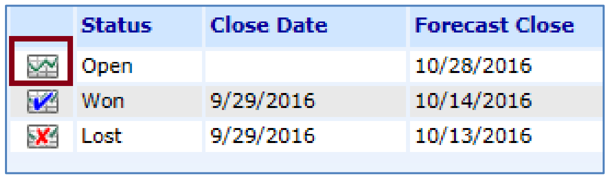
The Sales Opportunity is displayed on the Sales/Opps tab for the Contact.



Editing a Sales Opportunity

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

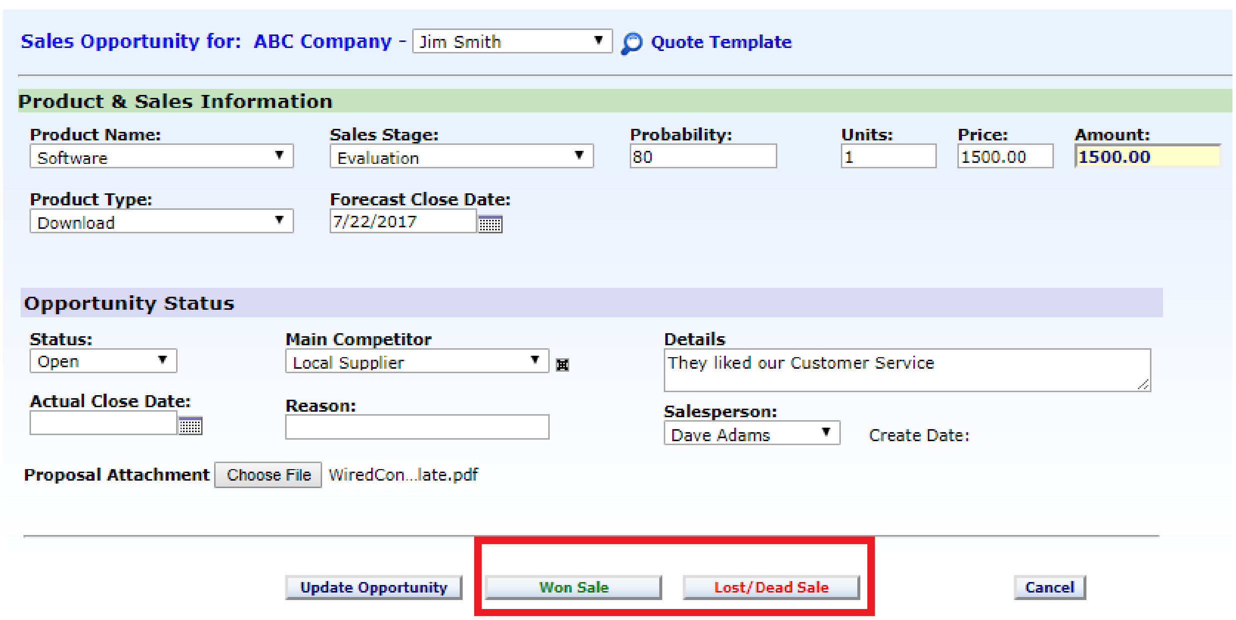
1. Go to the Sales Opps tab for the Contact you want to update the opportunity.
2. Click on the "Open" status icon to display the details of the Sales Opportunity.
3. Update your information, click "Update Opportunity".



	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:



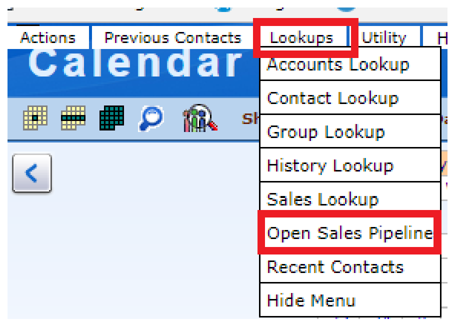
1. If the opportunity is **Won**, click on the "**Won Sale**" button. The system will modify the fields as follows:
   - *Status → Won*
   - *Stage → Closed/Won*
   - Actual Close Date will be filled in with today's date (you can edit, as needed).
   - Update the ID/Status field for the Contact to "Customer" 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. 

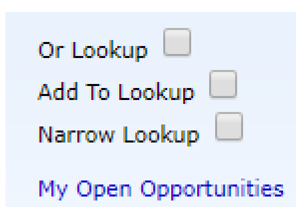
Open Sales Pipeline List

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

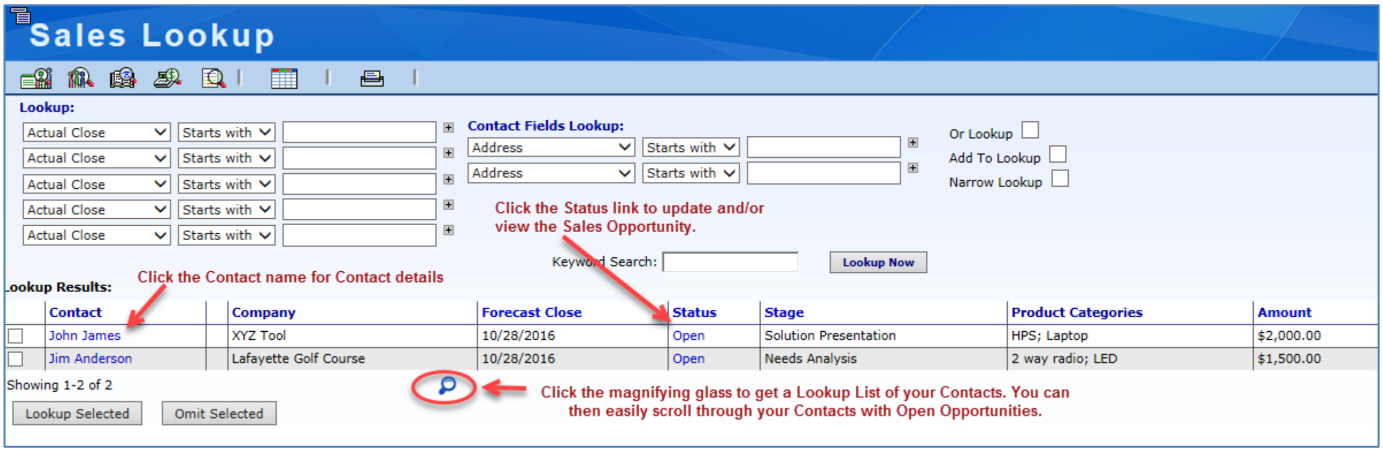
1. From any view, click on the Menu > Lookups > "Open Sales Pipeline".



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:

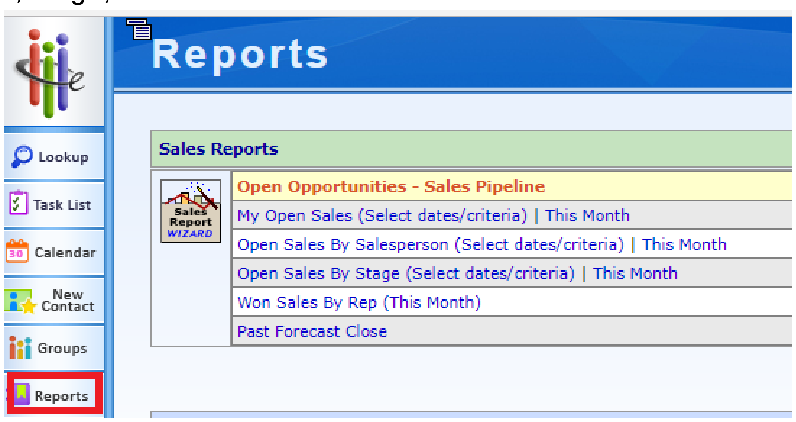
    

    b. To update or view the details of the opportunity, click on the "Status" link.
    c. You can perform a Contact Lookup from your Sales Lookup results by clicking on the magnifying glass, located on the bottom of the list. This will help you view all the activity / history for the Contacts with Open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

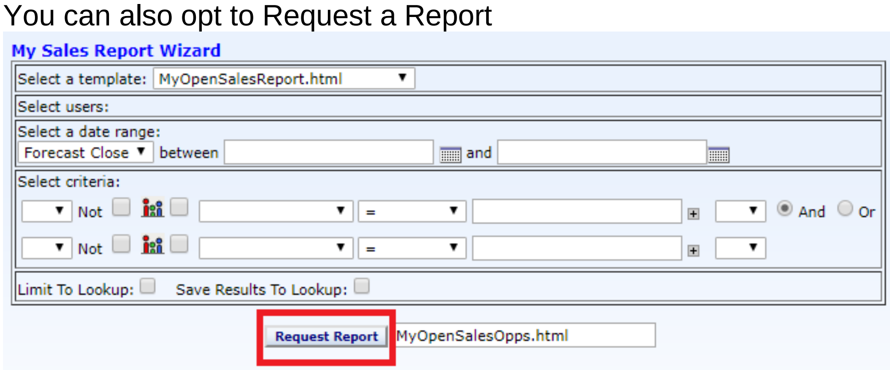


Note: You can use the Sales Lookup view to search on any Sales Opportunity by a field on the Sales Opportunity or Contact field. Please refer to the Chapter on Lookups on how to perform searches.

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



4. You can also opt to Request a Report



Chapter 6: Lookups

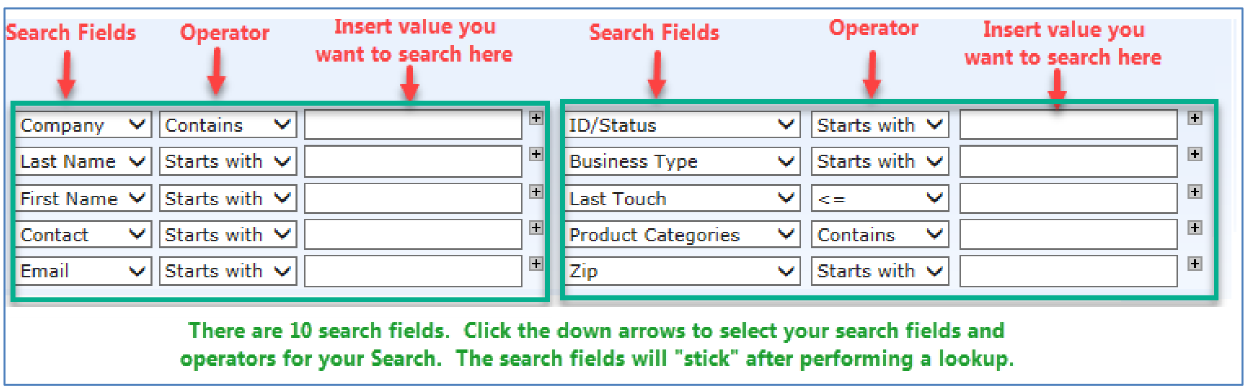
From the Lookup view, you can perform a search to find contacts in your database.

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.



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

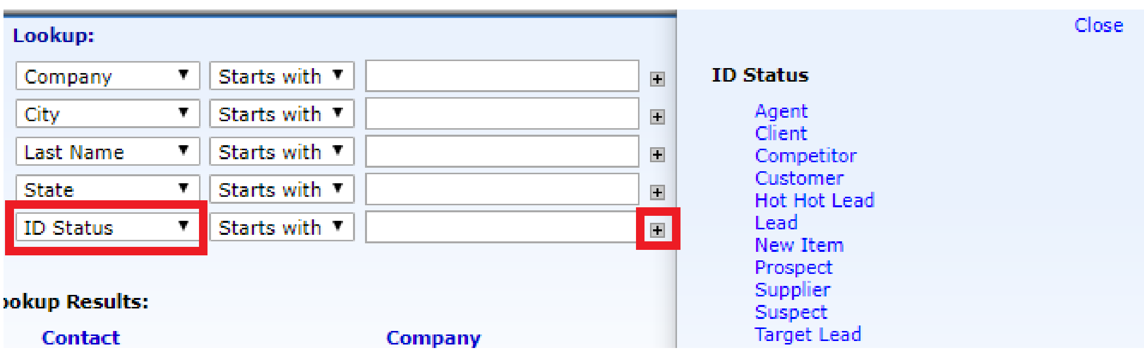
There are several operators in the Lookup View to help you search for the record(s) that you need.

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.



Keyword Searches

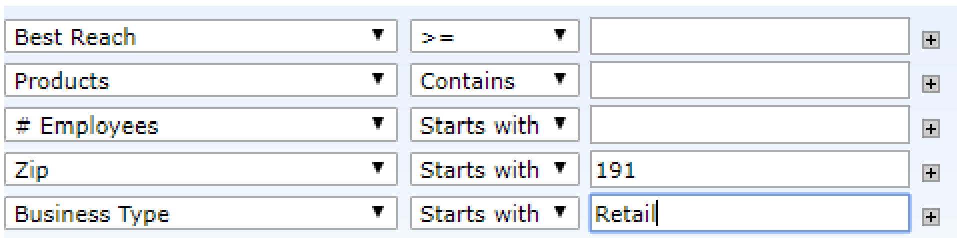
You can also search on Keywords if you do not know which specific field to find a value. The Lookup results will present the records that match your Keyword from any contact field in the database.

Performing Lookups

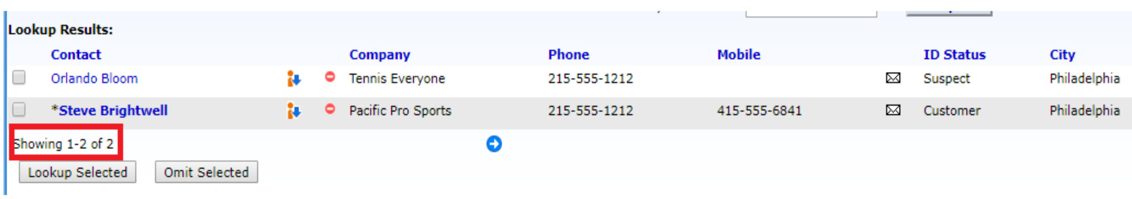
You can search for contacts on any field in the database. You may want to search on Company name, or Last Name. Or, you may want to find Contacts with the same value, ie. All the contacts with an ID Status = Prospect.

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".

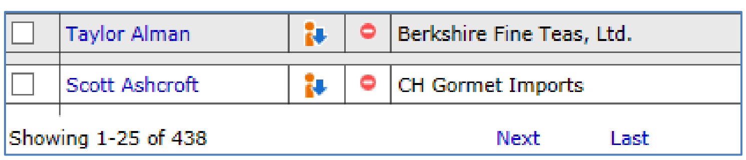
Then click the "**Lookup Now**" button:



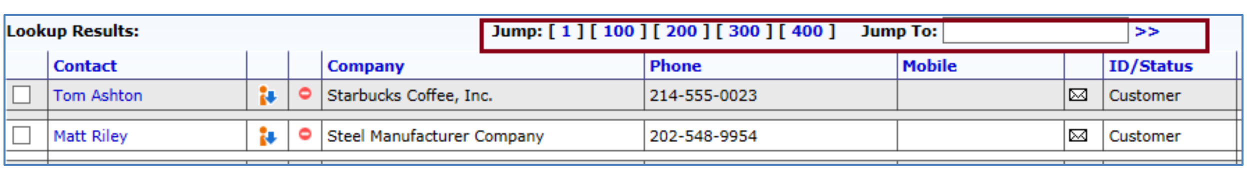
Your Lookup results will display below the search fields.



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.



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.

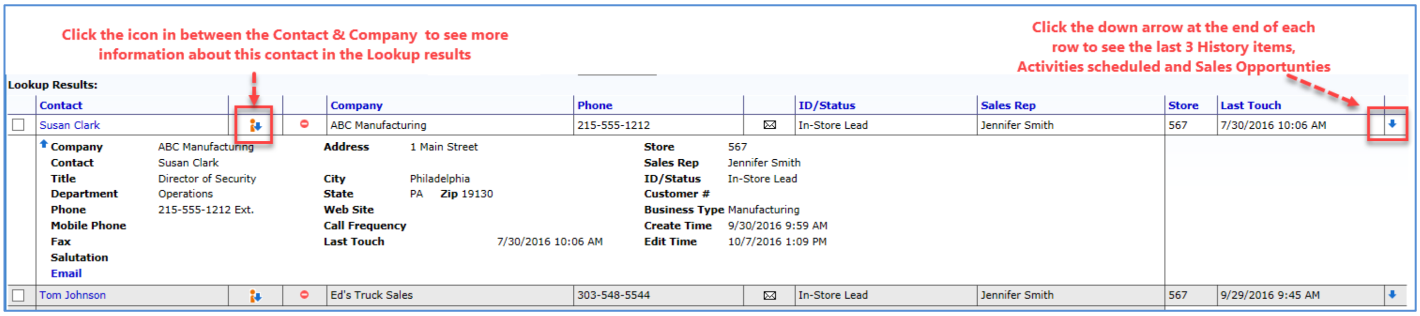


TIP! *The default sort of the Lookup results is Company, Last Name.*
You can also sort on each column header (blue label) to change the sort order.

To go to a Contact Record to see contact details to record a call or add a Sales opportuntiy, click on the blue link in the Contact column.

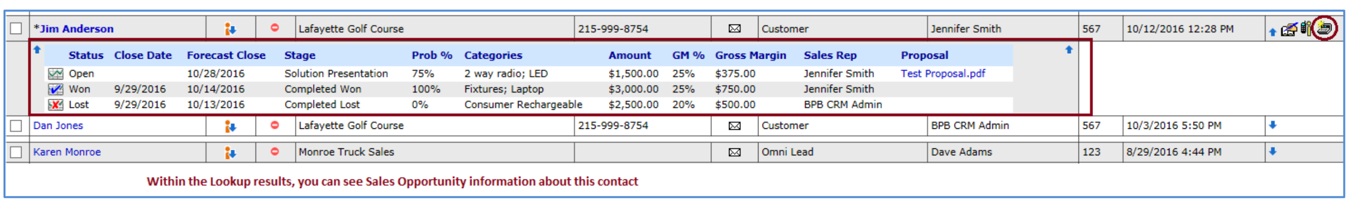
Lookup Results – Exploding Views

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.



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.

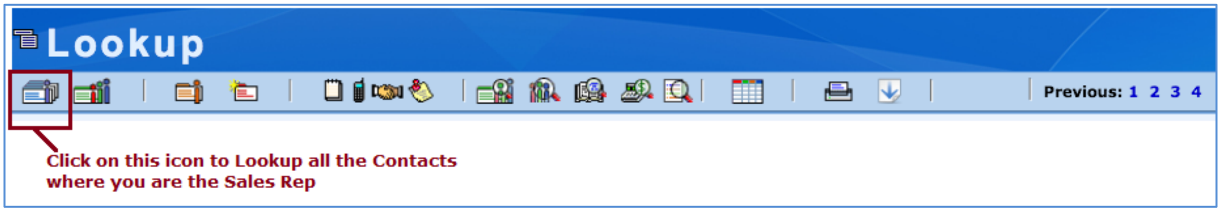
When you click on the Sales icon (register), the last 3 Sales opportunities appear in view in the Lookup results.



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.

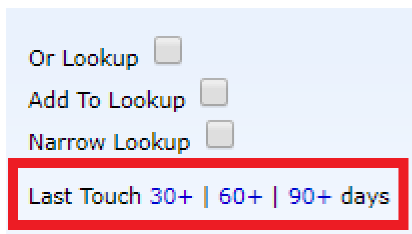


My Contacts – all the records where the "Sales Rep" is assigned to the logged in user.

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

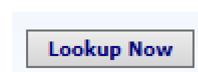
Last Touch: 30+ | 60+ | 90+ days – click on each of the numbers to see a list of the contacts that have not been called on in the last 30, 60 or 90 days respectively.

***NOTE**: These links omit the ID/Status of "Dead Lead".*



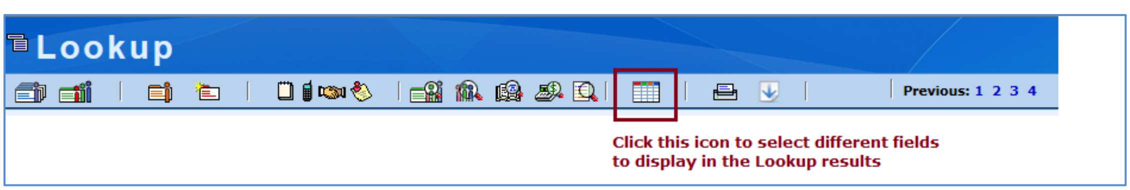
Lookup All

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.



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

Changing the Column Display of the Lookup Results

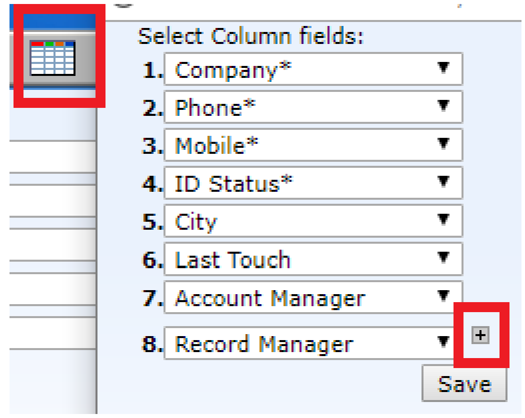


You can modify the columns that appear in the Lookup Results by clicking the  icon in the Lookup Toolbar.

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 *.

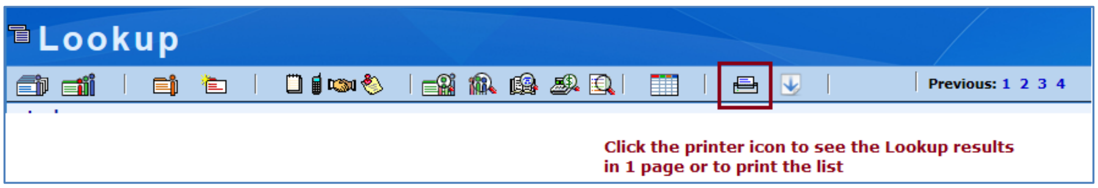
2. Click the down arrow of the column that you want to change and select a new field to display.

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

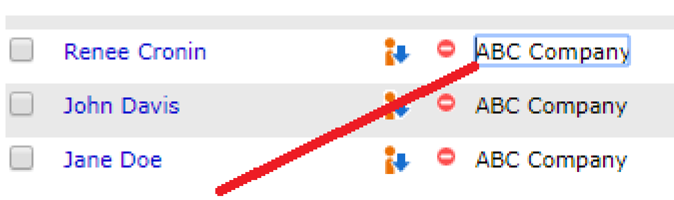


You can print the Lookup display list in user-friendly text by clicking the Print icon. It will print all of the items in the Lookup, not just the ones on the first page.

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.

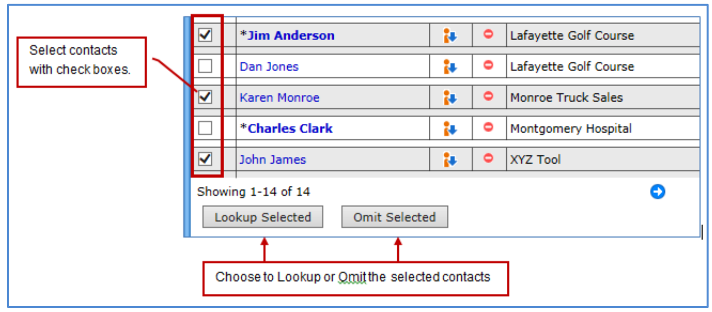


You can edit Contact records in-line from the Lookup results. Place your cursor in a fields to modify a value.

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

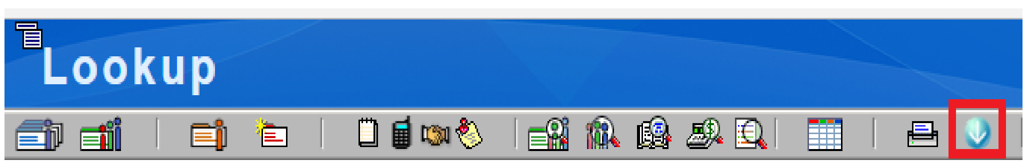
Once you have performed a lookup, you can refine your search by selecting contacts within the contact summary and choosing to Lookup or Omit the tagged items.



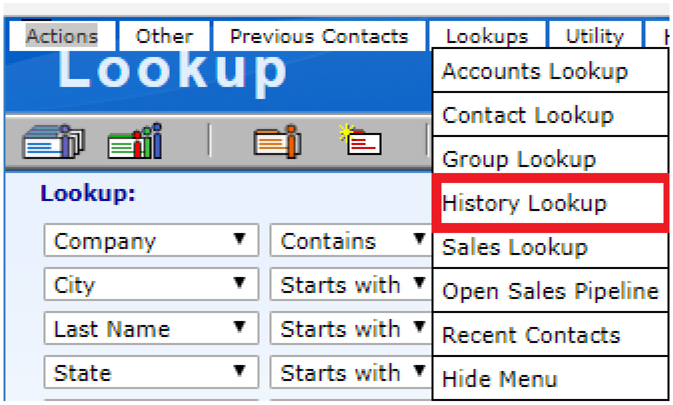
The "Lookup Selected" and “Omit Selected” buttons appear at the bottom of the Lookup Results screen and is directly related to the checkboxes that appear to the left of each entry.

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.

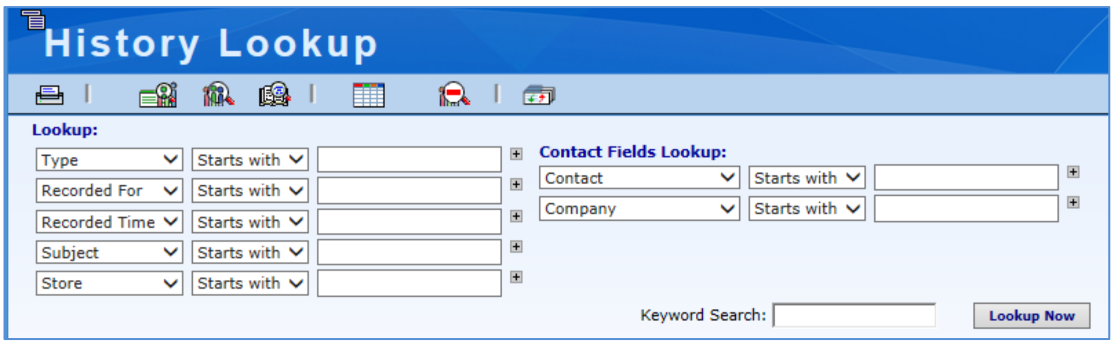


Sales, History & Activity Lookups



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.

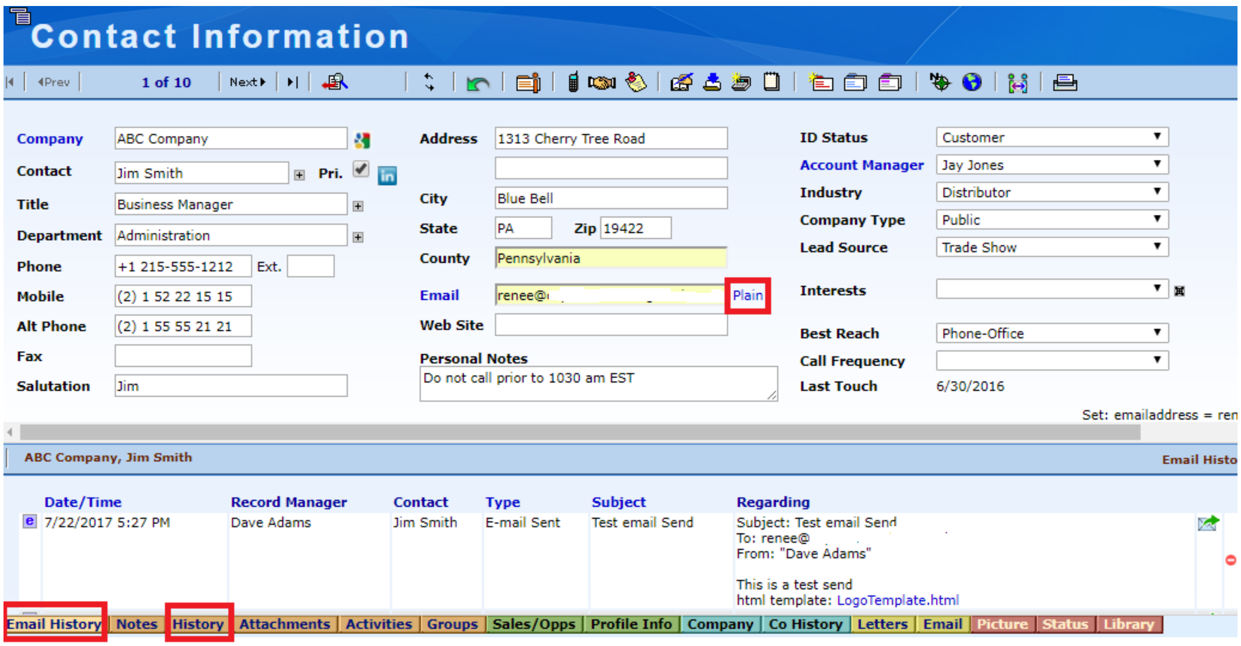


This is helpful if you are searching for a specific History Type or a specific note. From the Lookup results, you can go directly to a contact.

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.



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

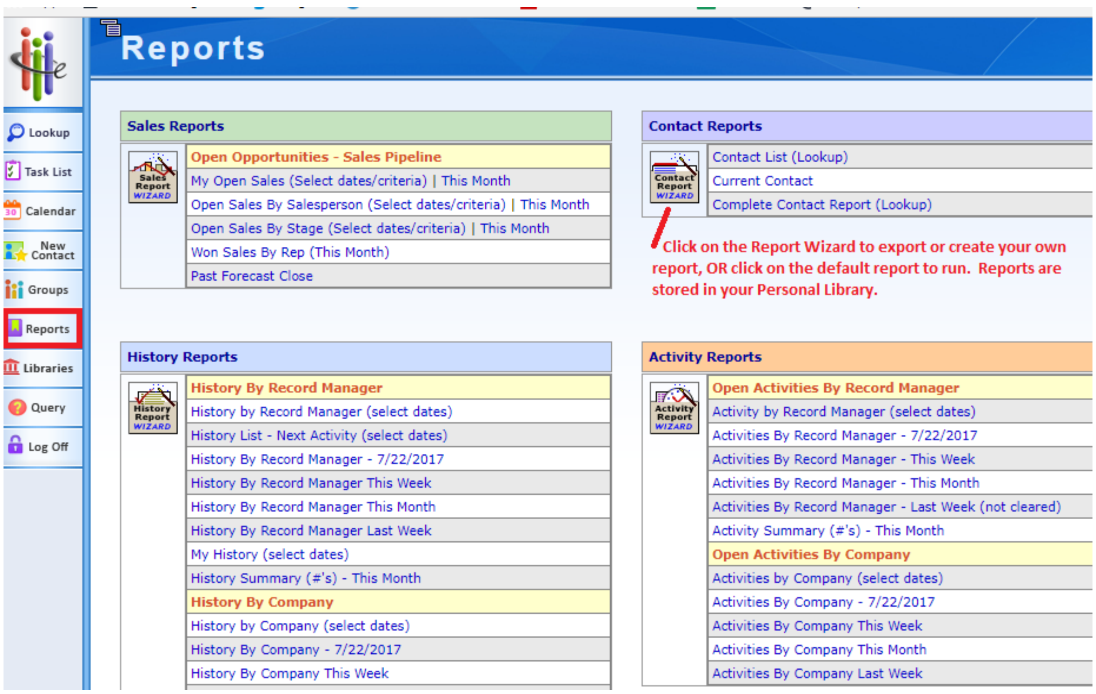
Chapter 8: Reports

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.



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.

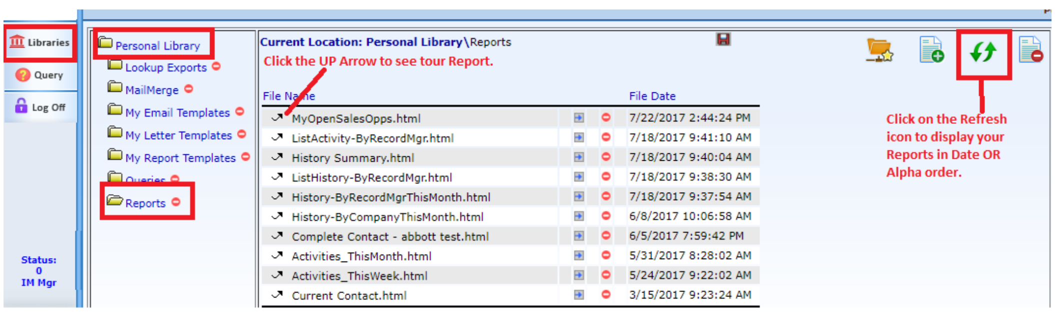
If you would like to Export information from WiredContact, please email support@wiredcontact.com for the Exporting User Guide.

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.