SalesJunction.com

Sales Force Automation & CRM

Quick Start Guide

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Overview

This guide contains examples and instructions to help your company get started quickly and get the most out of your SalesJunction.com rollout. The guide is divided into 3 sections:

- Setup
- Data Import
- Customization

Section 1: Setup

To get the most out of SalesJunction.com, you can set up and customize the system to mirror how your company does business.

Setup Steps:

1. Complete the system overview tutorial.
2. Add Users.
3. Add your own lookup list values.

Complete the System Overview Tutorial

The system overview is a short Flash tutorial to show you the basics of the system and how to get around.

If you have not already viewed the tutorial, please do so now.

Action:
Click the Help Icon at the top of the main SalesJunction.com interface. Look for the **General Systems Features & Navigation** link and click it.

Add Users

Create user profiles for all users who will be accessing the service. When you create users you may set their authority and other information to put them into the roles they will work in.

Action:
Click the Admin link at the top of the interface. From the left menu select the Users link, copy an existing user or create a new user using the buttons at the bottom of the page.

Add Your Own Lookup Values

Lookup values are values that apply to fields that have a specific list of values to pick from. They are also known as pick-lists or dropdowns. Field values such as Account Types, Industry Types, Account Ratings, Opportunity Stages, among others should be defined to fit your style of business.

Action:

Click on the Admin link at the top of the interface. Under the Lookup Tables in the left menu, select the item you would like to define values for.

Data Import

Section 2: Data Import

Importing your own data is a great way to get acquainted with the system. There is nothing like seeing your own information while working with the system. Even if you will be clearing out the data before you "Go-Live", you should import some of your own data to get started.

SalesJunction.com has a very flexible import wizard. The import wizard will walk you through a few questions about your data and let you map fields. There is a great tutorial on using the Import Wizard and we highly recommend you view the tutorial before going forward.

Action:
From the main interface, click the Admin link at the top. Under the Company Settings menu, select Import Contacts. Follow the directions of the Wizard as it walks you through the import process.

Customization

Section 3: Customizing the System

SalesJunction.com is highly customizable. You may add your own fields and create your own layouts for display and editing of your data. You will want to customize SalesJunction.com on an ongoing basis. You can add and remove fields at any time, so as needs arise you will want to add customizations to meet your business needs.

Areas of customization:

1. Customize standard pick-lists
2. Create your own fields
3. Customize page layouts
4. Customize the reports

Customize Standard Pick-Lists

This just touches once again on the above setup item about setting up your lookup values. There are seven standard lookup tables defined in the system. They are:

1. **Account Types**: examples for these are Prospect, Customer, Suspect, etc…

2. **Account Sub-Types**: anything you may want to use to subcategorize accounts.

3. **Industry Types**: generally these are things like automotive, accounting, software, pharmaceuticals, etc…

4. **Industry Sub-Types**: if you want to subcategorize your industries you could use things like Microsoft or Oracle for an Industry Type of Software.

5. **Account Ratings**: Hot, Medium, Cold are often used for this lookup.

6. **Opportunity Types**: examples of these include new business, take from competitor, add-on work, etc…

7. **Opportunity Stages**: this is a very important list. Your Sales Funnel report is summarized by opportunity stages. You will also want to label these starting with either a number or a letter. To get a better idea of how these are used take a look at the following typical stages in a sales cycle and notice how the letters are used to alphabetically sort the stages in the proper order:

- A. Prospect Qualified
- B. Demo Given
- C. Contract Submitted
- D. Won Opportunity
- D. Lost Opportunity

Notice the D. was used twice in this case since both of the D. items are really in the same stage of the opportunity.

Action:
To customize your standard lookup tables, click the Admin link at the top of the interface and open the menu for Lookup Tables. Then select the table you would like to modify.

Create Your Own Fields

SalesJunctino.com comes with many standard fields, however we can't cover every item that every company would like to keep track of. This is where the Custom Fields come into play. You can define your own field and names with their own pick-lists if needed. Once a custom field is created, you may use it in any part of the system such as the custom layouts, sorts, filters, reports, and even put them into your view columns.

Action:
Click the Admin link at the top, open the menu for Customizable Settings, and then choose the area you would like to create your custom field in.

You can make a custom field a pick-list by adding a _LST to the end of the field name or you can make it a Y/N checkbox by using _YN. If you make any a pick-list be sure to add values to the fields list by selecting it from the main listings and clicking the button at the top the main listing called Edit Field Values List.

Customize Page Layouts

You may customize the page layouts for most parts of the system. Page layouts for each section have two different formats, the Detail Display Page and the Edit Page. The display page is the page that shows up when you view the items detail. The edit page is used when doing data-entry on the record.

Action:
To customize your page layouts, click the Admin link at the top of the interface and open the menu for Customizable Settings. Select the link for Detail & Edit Pages.

You'll find a link to a tutorial on this page that will show you how to use this part of the system.

Customize Reports

Reports are invaluable tools to help you analyze the data in your company. SalesJunction.com provides a number of standard reports and you can create your own custom reports using our powerful Report Writer. After adding your custom fields, you can change standard report to include them or write completely new reports.

Some of the standard reports are:

- **Sales Funnel** – This report is probably the most run report. The report shows all open opportunities summarized by the stage they are in. This is also known as a sales pipeline.

- **Sales Summary** – This report shows all closed sales summarized by sales rep and defaults to the prior month. You can easily click the Criteria button at the top to change the date range.

- **Recent Notes** – This report shows the last 100 notes that were entered into the system. For admin users, you see notes across the entire system.

- **Referral Sources** – Want to know where your leads are coming from? Run this report and see all the referral sources for your contacts. You can use this to determine how well your methods are producing leads.

- **Email Export** – This is a general email listing of all your contacts. You can export this report into a .csv format and import it into any system you need emails in.

- **Activity List** – This report will show you all activities in a date range. You can select to see all open or closed activities.

Action

To customize or create new reports: Click on the Admin link at the top and open the Company Settings. Then click on the Report Writer option to view all your reports.

If you would like to create a new report, you will need to add it to the **Menu Tree** for the proper user types. Administrators see reports under the **rpts_a** menu and a general user will see the reports under the **rpts_u** menu. This allows you to create sensitive reports that only higher-level users can see.