Industrial CRM

Customer Search

USER GUIDE

Updated June 12, 2019

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DISCLAIMER

We update Customer Search frequently. This user guide will be updated on an ongoing basis and may have slightly outdated content due to the frequency of software updates. Please review the most current version of this guide regularly and with care.

TRADEMARKS

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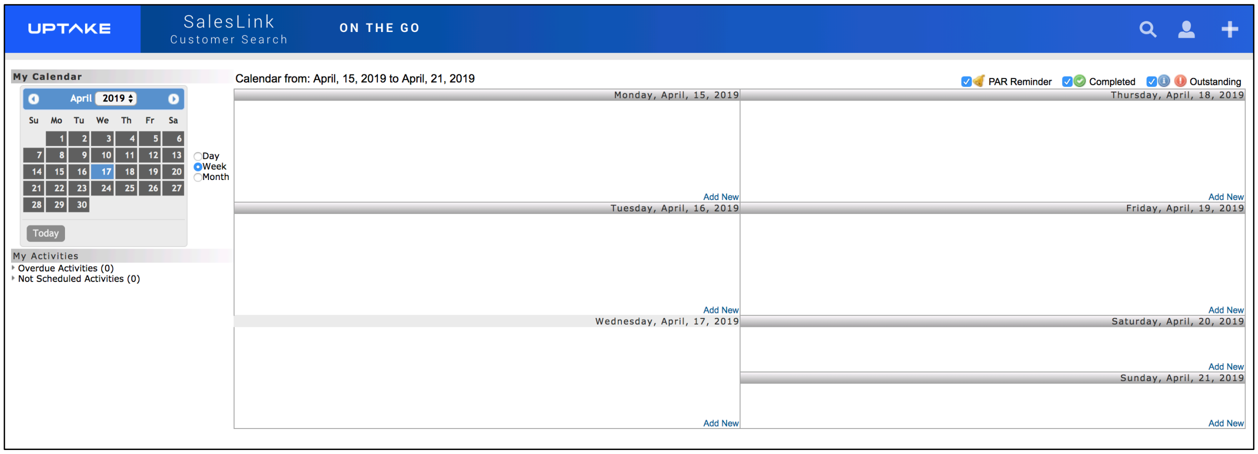
CUSTOMIZATION

This user guide will show you how to use the Customer Search application with the assumption that your dealership has made the migration to CloudLink and your Customer Search application has been set up in a standard configuration. However, it should be noted that depending on your dealership's level of customization, or if your dealership hasn't migrated to CloudLink yet, your screens may look slightly different than those shown here.

OVERVIEW

Log in to CloudLink with your Username and Password, then click the **ENTER** button under **Customer Search**. You will be taken to the SalesLink Customer Search Home page.



Home

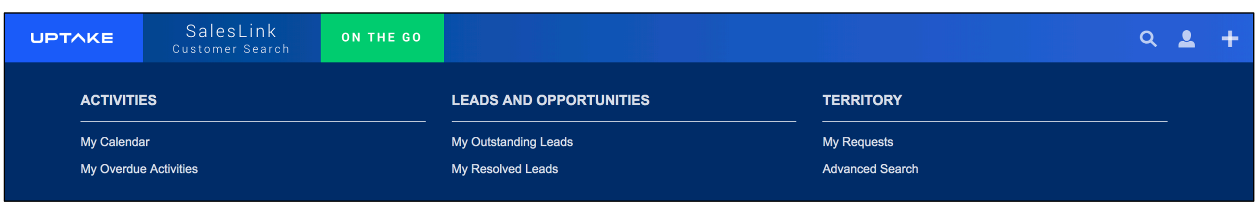
The Home page displays a calendar of your activities for the current week. Hover your cursor over an activity to view more details. Use the smaller calendar to the left to change the week displayed.

Below the small calendar are useful links related to your Activities, when available.

Navigation Bar

At the top of the screen is a navigation bar that can be accessed from anywhere in the application.

On The Go

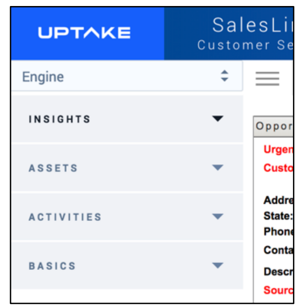


Hover over the ON THE GO tab to access pages related to your daily Activities, Leads and Opportunities, and Territory.

Search

Click on the Search icon and use the filters to find specific information within Customer Search. Click the **Search** button to view a list of search results. Click the Customer Number to view more information on that customer.

NOTE: Click the **Advanced Search** button to conduct an Advanced Search. For more information, see the **Advanced Search** portion of the **Territories** section.



Click the Division field to filter customer menu by Division. The sections of the Customer Menu contain the following areas:

- Insights – View all leads and surveys.
- Assets – View rental equipment, equipment list, service letters, work orders, and iMACs projects.
- Activities – View all outstanding and completed activities.
- Basics – View customer information, job sites, and documents.

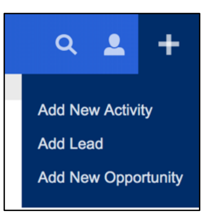
NOTE: You can also access the Customer Menu when viewing a Lead or Opportunity. To do so, click the Menu icon next to the customer name.

NOTE: Some sections allow you to add entries, such as Leads or Equipment. To do so, click the Plus icon.

Profile

Click on the Profile icon to view/edit your current User Profile information, if available.

Quick Links



Click on the Plus icon at the far right to perform basic tasks from anywhere in the application.

Activities

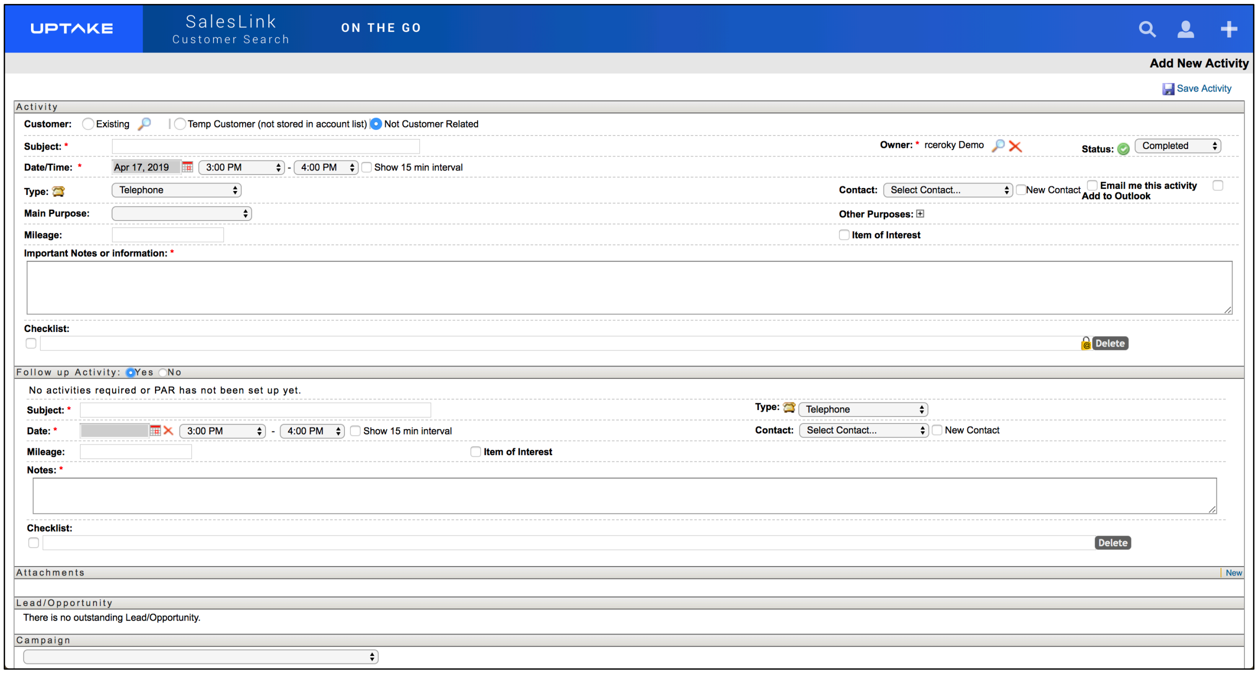
Activities are an indicator of how sales reps are engaging with customers and of how much time they're spending with them.

Daily activities are automatically displayed on the Home page after logging in, and can also be accessed by clicking the **My Calendar** link under ON THE GO in the top navigation bar. For more information see the **Home** section.

Add an Activity

To add a new activity:

1. From the Home page, click the **Add New** link at the bottom right corner of the day you want to schedule the activity in the calendar. From the top navigation bar, click the **Add New Activity** link under the Plus icon.
2. Enter all required information into the Add New Activity form.
3. Click the **Save Activity** link at the top right or bottom right of the page.



Once saved, the activity will appear in the owner's calendar.

Helpful Information

Status:

- Outstanding – activity is scheduled and has not occurred yet
- Completed – activity has been completed (a follow-up activity can now be scheduled)

- Cancelled – a planned activity has been cancelled for any reason
- Overdue (visible on calendar and reports only) –an activity with a scheduled date before the current date; status will automatically change
- Not Scheduled (visible on calendar and reports only) – an activity without a scheduled date; status will automatically change.

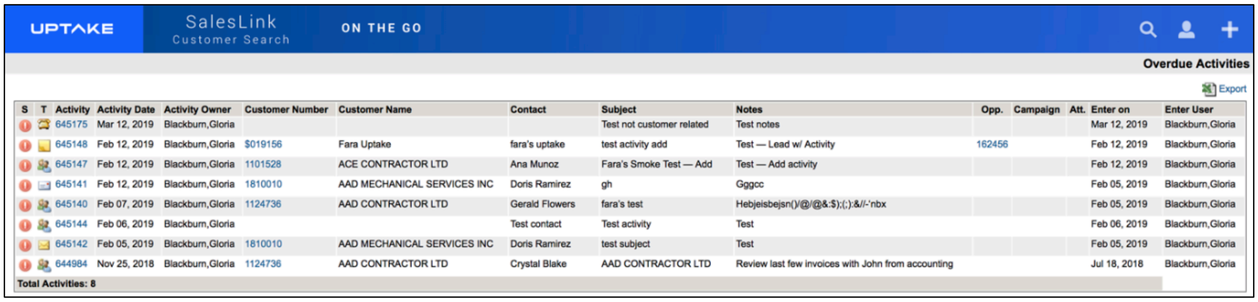
Type:

- Email – Best practice: attach the email in the activity in the attachment section
- Fax – Best practice: indicate fax information in notes (i.e. subject, date, time, etc.)
- Letter – if soft copy is available, attach it in the attachment section
- Meeting – keep notes of what was discussed in the notes section and create a follow-up activity with any outstanding items
- Message – if the message was left with someone other than the contact's voicemail, indicate who the message was left with
- Special Event – examples would be a trade show or open house
- Telephone – detail the information from the conversation

Follow-up Activity:
This option will only appear if the Status of the opportunity is set to Completed. If Follow-up Activity is checked Yes, the same fields as entering a new activity will appear. It will also suggest when to make the next activity based on the customer's PAR. If the activity is not customer related or if it's for a new customer, it will assume the PAR is 0.

Overdue Activities

Overdue activities are activities entered into the system with an activity date prior to the current date. Click the **My Overdue Activities** link to the left of the calendar on the Home page, or under the ON THE GO tab in the top navigation bar.



S	T	Activity	Activity Date	Activity Owner	Customer Number	Customer Name	Contact	Subject	Notes	Opp.	Campaign	Att.	Enter on	Enter User
		645175	Mar 12, 2019	Blackburn,Gloria				Test not customer related	Test notes				Mar 12, 2019	Blackburn,Gloria
		645148	Feb 12, 2019	Blackburn,Gloria	$019156	Fara Uptake	fara's uptake	test activity add	Test — Lead w/ Activity	162456			Feb 12, 2019	Blackburn,Gloria
		645147	Feb 12, 2019	Blackburn,Gloria	1101528	ACE CONTRACTOR LTD	Ana Munoz	Fara's Smoke Test — Add	Test — Add activity				Feb 12, 2019	Blackburn,Gloria
		645141	Feb 12, 2019	Blackburn,Gloria	1810010	AAD MECHANICAL SERVICES INC	Doris Ramirez	gh	Gggcc				Feb 05, 2019	Blackburn,Gloria
		645140	Feb 07, 2019	Blackburn,Gloria	1124736	AAD CONTRACTOR LTD	Gerald Flowers	fara's test	Hebjeisbejsn()/@/@&:$);(;):&//-'nbx				Feb 05, 2019	Blackburn,Gloria
		645144	Feb 06, 2019	Blackburn,Gloria			Test contact	Test activity	Test				Feb 06, 2019	Blackburn,Gloria
		645142	Feb 05, 2019	Blackburn,Gloria	1810010	AAD MECHANICAL SERVICES INC	Doris Ramirez	test subject	Test				Feb 05, 2019	Blackburn,Gloria
		644984	Nov 25, 2018	Blackburn,Gloria	1124736	AAD CONTRACTOR LTD	Crystal Blake	AAD CONTRACTOR LTD	Review last few invoices with John from accounting				Jul 18, 2018	Blackburn,Gloria

Total Activities: 8

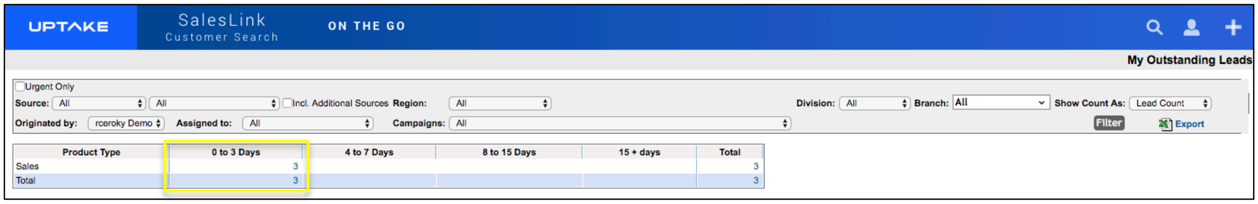
This page displays a list of all your currently overdue activities. Sort the table by clicking on a column header to sort the column in ascending or descending order.

Export the table into an Excel spreadsheet by clicking the **Export** link at the top right of the page.

Click on the Activity Number to view the activity's details, the Customer Number to view the associated customer details, or the Opportunity Number to view the associated opportunity details (if available).

Leads and Opportunities

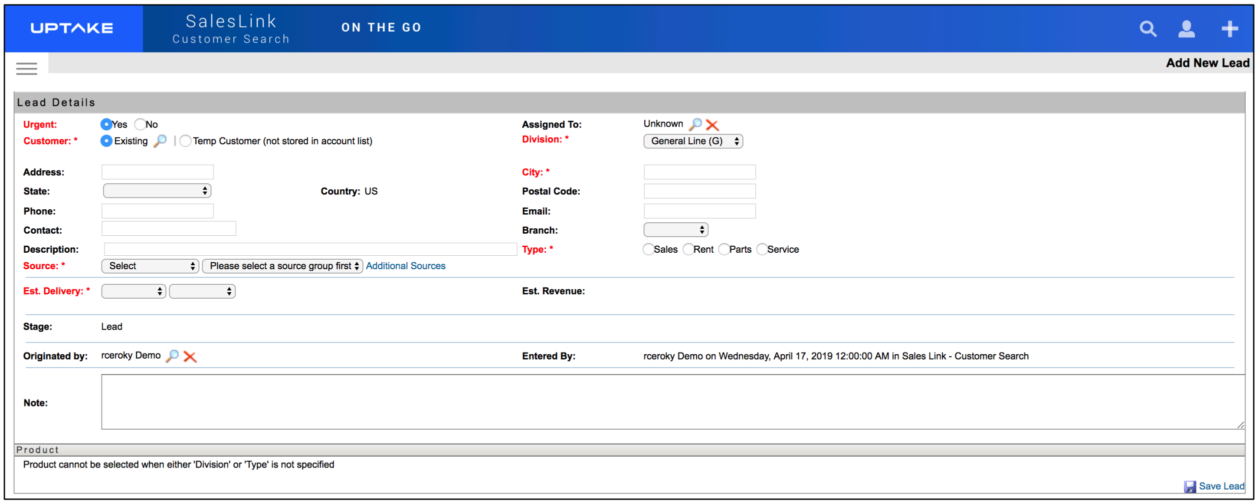
The My Outstanding Leads page displays a list of all leads that need to be followed up on, organized by the number of days since creation. Click the number link within a Days Since Creation column, then click on a lead to view the Lead details.



Add New Lead

To add a new lead:

1. Click the Plus icon at the far right of the top navigation bar, then click the **Add Lead** link in the drop-down menu.
2. Enter all required information into the fields in the Add New Lead form.
3. Once the lead's Division and Type have been specified, you will have the option of entering information into the Product section.
4. Click the **Save Lead** link.



Once a lead has been created it will appear on the My Outstanding Leads page.

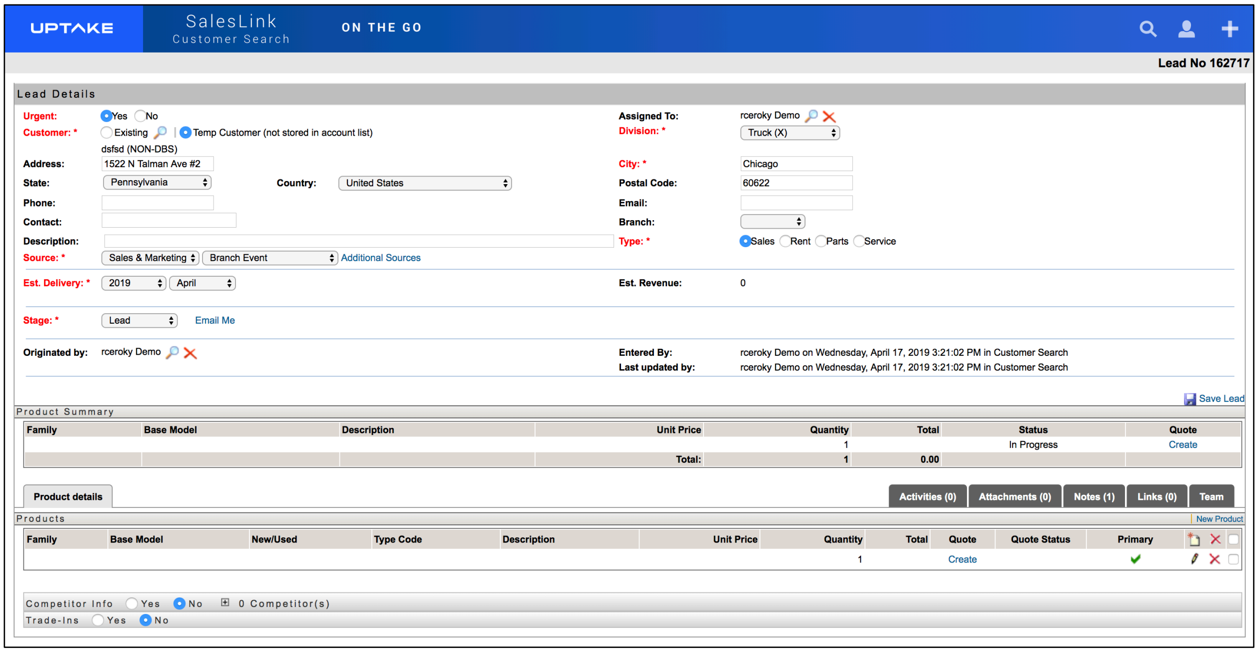
Edit Lead

To edit a lead:

1. Click a number in a Days Since Creation column on the My Outstanding Leads page.
2. Click the **Opportunity Number** link for the desired lead.
3. Make all necessary changes to the lead.
4. Click the **Save Lead** link at the bottom right of the page.

Transfer Lead to Opportunity

Open a lead to view the Lead details.



1. Add any activities that occurred when following up on the lead by clicking the Activities tab at the bottom of the page, then click the **New** button.
2. Enter all required information into the Add New Activity form, then click **[Save Activity]** to add it to the lead.
3. In the Lead Details section, click the **Stage** drop-down menu and select the current stage of the lead (Outstanding, Development, or Proposal) to promote the lead to an opportunity.
4. Click the **Save Lead** link to promote the lead to an opportunity.

As the opportunity is worked on, Product details, Notes, Attachments, Quotes, etc., can be added to the Opportunity Details page.

Transfer Lead to No Lead

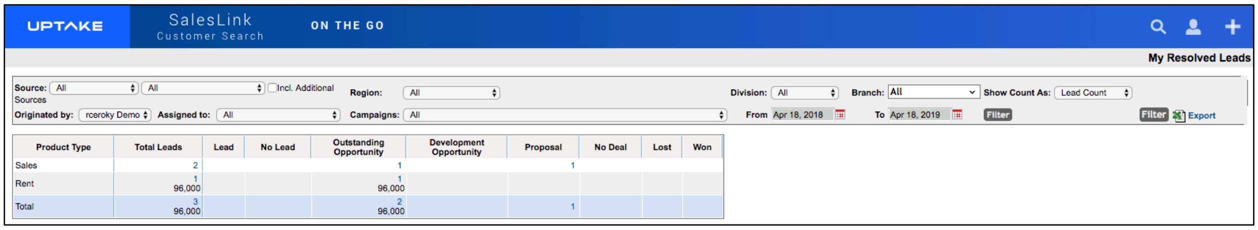
From the Leads page, click on a lead to view its Lead details.

1. Add any activities that occurred when following up on the lead by clicking the Activities tab at the bottom of the page, then click the **New** button.
2. Enter all required information into the Add New Activity form, then click **[Save Activity]** to add it to the lead.
3. If it becomes apparent that the lead is not going anywhere, click the **Stage** drop-down menu and select No Lead.
4. Click the **Save Lead** link transfer the lead to No Lead.

NOTE: Once a lead has been transferred to No Lead it cannot be edited. If the lead needs to be reopened, a new lead must be created.

Add New Opportunity

Opportunities can be created without having to go through the Lead stage first. To view all current opportunities, click the **My Resolved Leads** link under ON THE GO in the top navigation bar.



The My Resolved Leads page displays a grid of all currently open opportunities, grouped by stage.

To filter the list:

1. Select the fields you want to filter by at the top of the page.
2. Click the **Filter** button.

Export the list into an Excel spreadsheet by clicking the **Export** link at the top right of the page.

Click the number link within an Opportunity Stage to see a list of all opportunities within that stage.

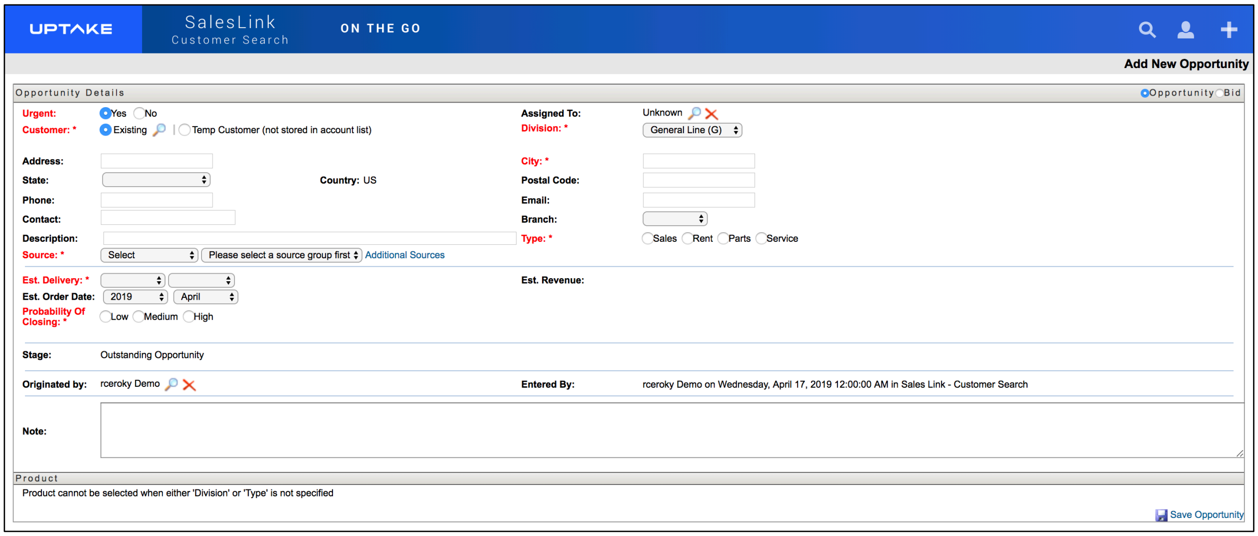
To filter the list:

1. Select the fields you want to filter by at the top of the page.
2. Click the **Filter** button.

Export the list into an Excel spreadsheet by clicking the **Export** link at the top right of the page.

To add a new opportunity:

1. Click the Plus icon at the far right of the top navigation bar, then click the **Add New Opportunity** link in the drop-down menu.
2. Select whether this is an Opportunity or a Bid.
3. Enter all required information into the fields in the Add New Opportunity form.
4. Once the opportunity's Division and Type have been specified, you will have the option to enter information into the Product section.
5. Click the **[Save Opportunity]** button.



Once an opportunity has been created it will appear on the My Resolved Leads page.

Edit Opportunity
To edit an opportunity:

1. Click the number link within an Opportunity Stage to see a list of all opportunities within that stage from the My Resolved Leads page.
2. Click the **Opportunity Number** link for the desired lead.
3. Make all necessary changes to the opportunity.
4. Click the **Save Opportunity** link at the bottom right of the page.

Opportunity Stages

Stages of completion are assigned according to which stage the deal is currently in.

- **Outstanding:** An opportunity to sell something has been identified and qualified, but the sales rep has not started working on it.

- **Development:** The sales rep has started working on this opportunity, such as gathering requirements from the customer or internal requirements from the dealership. A quote has been started and is in progress.

- **Proposal:** The sales rep has completed a quote and has submitted it to the customer for review. This stage represents outstanding quotes to customers that are still in negotiation, re-quoting stages, or waiting for customer acceptance.

NOTE: If the opportunity is changed to the following stages, the information can no longer be edited and the stage cannot be changed back to previous stage types.

- **Won:** The customer has proceeded with the proposal and will purchase the equipment. When changing to this stage additional information is necessary in order to save the opportunity.

- **Lost:** The customer has decided to go with a competitor. The lost sale page will appear and must be completed to save the opportunity at this stage. This Lost Sales information will appear in certain reports in SalesLink Executive.

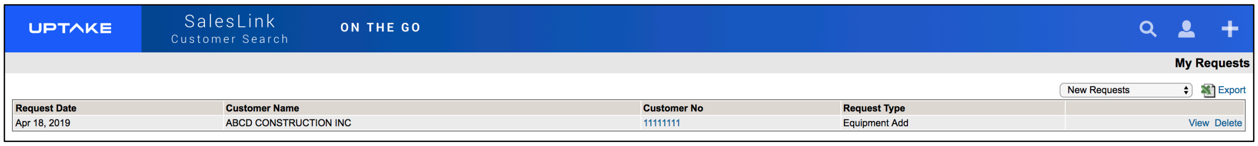
- **No Deal:** The customer has decided not to purchase. The only additional information that will be necessary is the reason.

TERRITORY

My Requests

Requests are changes to a customer's information, including adding equipment, assigning a customer, adding influencers, etc., that are sent to their assigned SalesLink Administrators (or branch administrators or gatekeepers) to make the change in DBS or in SalesLink.

Click the **My Requests** link under ON THE GO in the top navigation bar. The My Requests page displays.



This page displays a table detailing all currently open requests, organized by Date, Customer Name, Customer Number, and Request Type.

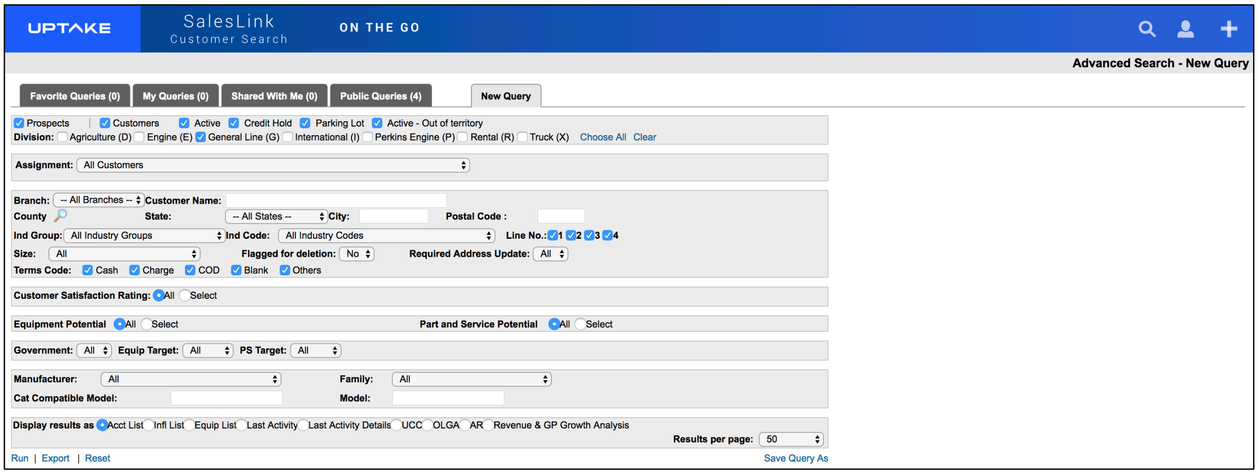
Use the Request Status drop-down menu at the top right to view requests with other statuses:

- New Requests
- Done Requests
- Hold Requests
- Invalid Requests
- Follow-up Required
- Follow-up Completed
- Done and Copy to another
- Push to DBS

Export the table into an Excel spreadsheet by clicking the **Export** link at the top right of the page.

Advanced Search

To run an advanced search for customers or prospects, click the **Advanced Search** link under ON THE GO in the top navigation bar. The Advanced Search – New Query page displays.



To run a new query:

1. Select all parameters you want to search by in the New Query form.
2. Select how you want to display your results.
3. Click the **Run** link at the bottom left of the page. Your results will display in the manner you selected.
4. Click the **Reset** link if you want to return all search parameters to their default settings.

You can also click the **Export** link if you want to export your results into an Excel spreadsheet.

To save a query:

1. Click the **Save Query As** link at the bottom right of the page.
2. Enter a Name for your query.
3. If you want to share your query, click the **Change** link and select users to share with from the list.
4. Click **[Save]**.

Click the tabs at the top of the page to view Favorite Queries, My Queries, Shared With Me, and Public Queries. Click the **Run** link to run one of these queries, or **[Export]** to export the results of a query to an Excel spreadsheet.

