

SalesOutlook Web[®]

User Guide

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Outlook CRM - SalesOutlook Web

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Welcome to SalesOutlook Web[®]

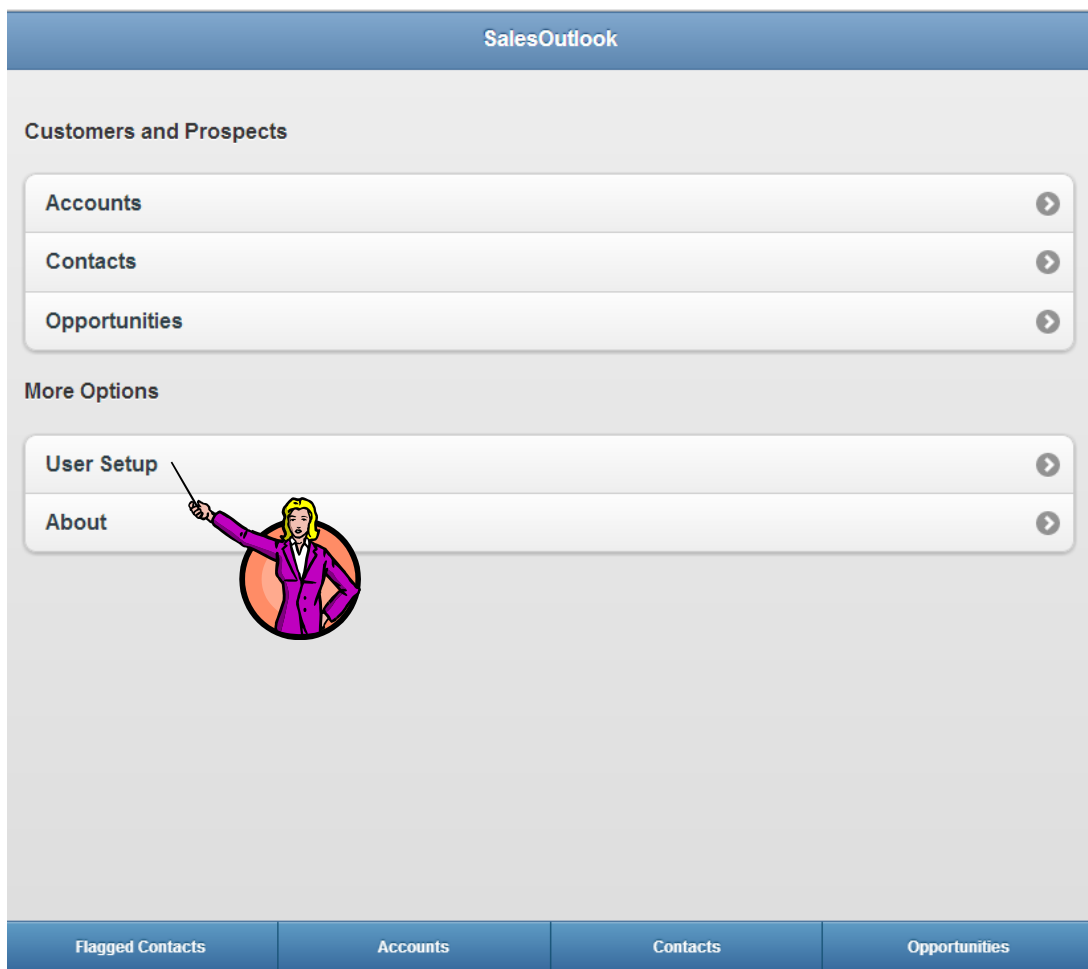
SalesOutlook is the first application to fully leverage MS Outlook and Exchange Server to provide full functional customer relationship management (CRM). This Guide is intended for all levels of SalesOutlook users from the novice to the experienced user who wants to optimize customer relationships. You'll find this guide to be a comprehensive overview of SalesOutlook Web.

SalesOutlook is a complete Customer Relationship Management (CRM) solution. It begins by enabling you to track all of the details related to an account. For sales representatives, we recommend you begin by taking the top 25 accounts in your territory and entering the basic information. Once entered, you're able to manage these accounts by integrating all aspects such as contacts, opportunities, notes, and customer related inquires for these accounts.

SalesOutlook Web is designed to enhance the SalesOutlook Outlook CRM client and can be used as a subset to gather and input data via handheld devices such as PDA's and smartphones as well as any computer with a browser.

Getting Started

You can get started right away using SalesOutlook Web by requesting a userid and password to be setup by your SalesOutlook Account Representative. As of this writing the URL is <http://m.salesoutlook.com> . Sign in and click on **User Setup** to enter the information for your Exchange server.



User Credentials
SALESOUTLOOKINC\gary

Gary Cawley	1
ews@salesoutlook.com	2
SalesOutlook	3
salesoutlookinc	4
•••••	5
soexchange01.salesoutlook.com	6
SalesOutlook	7
Use delegate mailbox <input type="checkbox"/>	8

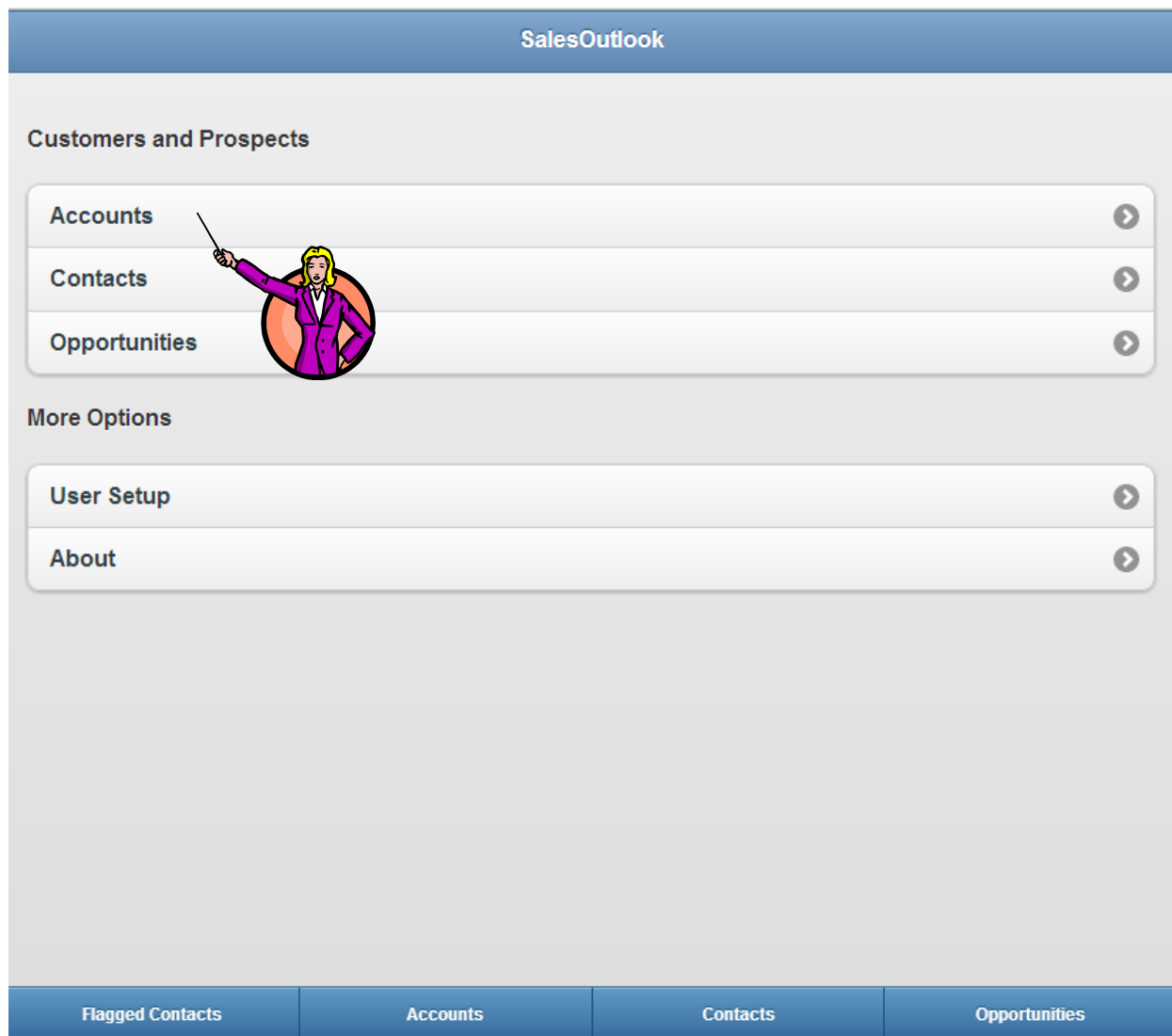
Save

1. Enter your name
2. Enter your email address or Exchange login name. Note: If you are using a delegate mailbox then enter the email address of the delegate mailbox.
3. Enter your email address
4. Enter in a domain name if you do not use an email address to login. Leave this blank if you use an email address to log in. If you login with domain\username then the first part needs to go into the domain field.
5. Enter the password associated with the step 2.
6. Enter the server URL that you use to login to OWA. If you login to <https://server.outlook.com/owa> then enter server.outlook.com. If you use Office 365 you will need to login to your Inbox to find the URL.
7. Enter the path to the SalesOutlook folder. This will normally be "SalesOutlook" but if you have a top level folder (ie CRM) then enter "CRM\SalesOutlook"
8. Check use Delegate if this is a delegate mailbox.

Working With Account Profiles

Account Profiles enables you to track and maintain all details related to an account (customer). SalesOutlook is an account centric program and therefore, all items are entered through Account Profiles. Once in Account Profiles, access to other folders such as opportunities, contacts, and tasks are accessible.

Click on the Accounts section.



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You have three options for Accounts. New Account, Search or list my Accounts. Click on the New Account to create a new account

Create a new Account

The screenshot shows the 'Opportunities' page in Outlook CRM. At the top, there is a blue navigation bar with a 'Back' button on the left and a 'Home' button on the right. Below the navigation bar, the page is divided into two main sections: 'New' and 'Search Account'. Under the 'New' section, there is a button labeled 'New Account' with a right-pointing arrow. Under the 'Search Account' section, there are two buttons: 'Search Account' and 'List My Accounts', both with right-pointing arrows. A cartoon illustration of a woman in a purple suit pointing with a pen is overlaid on the 'New Account' button. At the bottom of the page, there is a blue footer bar with three tabs: 'Accounts', 'Contacts', and 'Opportunities'.

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Enter the account information and click on Save.

Create Account

Account Name

Phone

Street Address

City

State

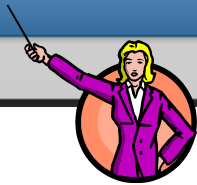
Zip

Type

Status

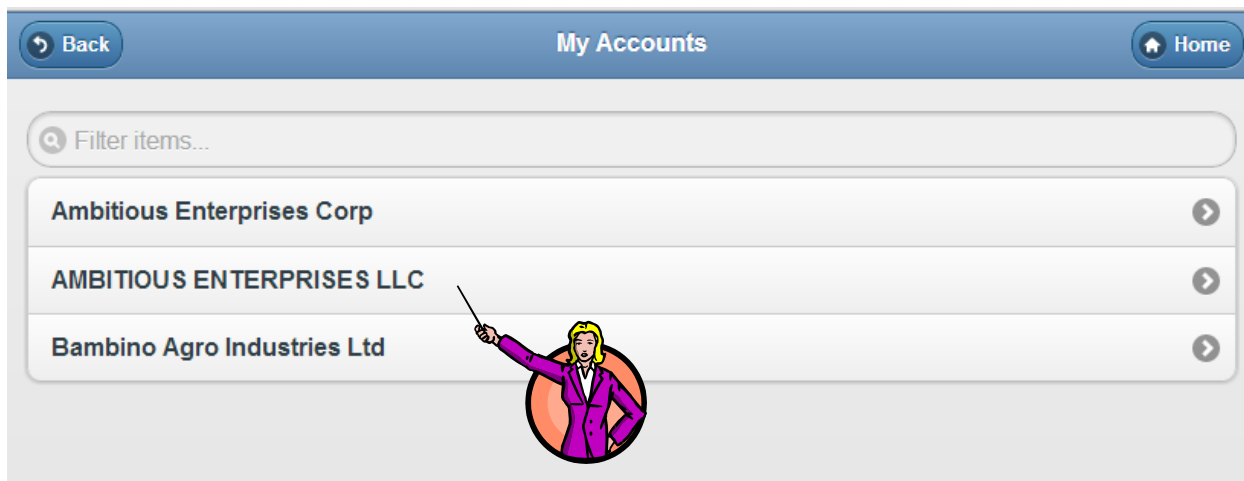
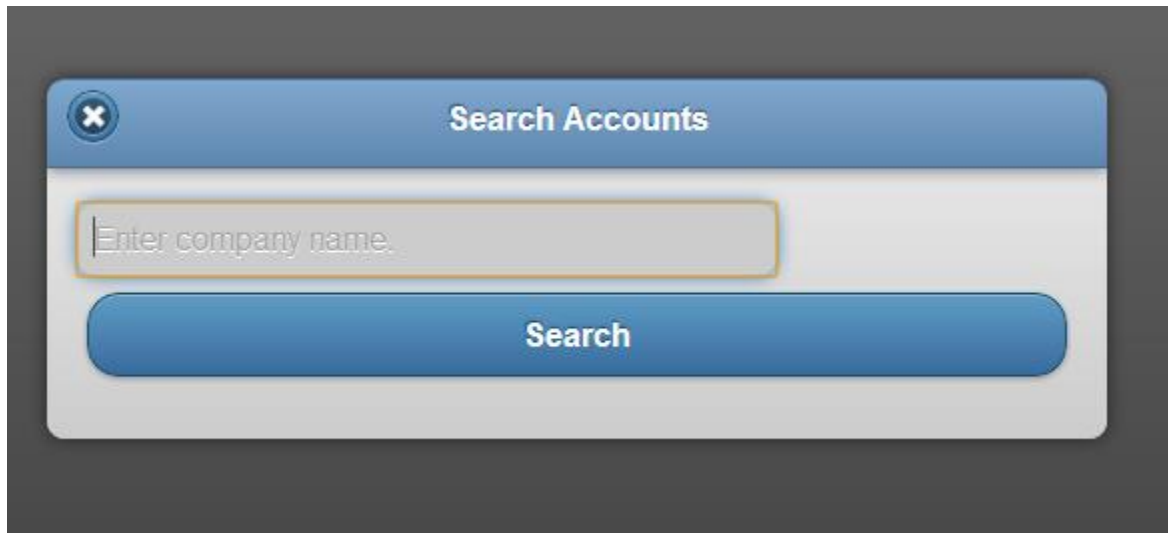
Web Site

Save



Searching for Accounts.

If you click on Search account then enter the search information and click on the Search button.



If you search for an account or list your accounts (Accounts where you are the account manager) then you will get a list of accounts.

Click on an account to open the account record.

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Back SalesOutlook

AMBITIOUS ENTERPRISES LLC

Customer / Buyer

Prospect

(770) 910-2425

Update Address

3070 MAIN STREET
ATLANTA
GA 30005

Contacts

Notes

Opportunities

Click the company name to edit the Account type, status and phone number

Click on Update Address to update the account Address

Edit Account Information

Enter the new information and click on the Save button.

Edit

AMBITIOUS ENTERPRISES LLC

Customer / Buyer

Prospect

(770) 910-2425

Save

Outlook CRM - SalesOutlook Web

Edit

3070 MAIN STREET

ATLANTA

GA

30005

Save

[Back](#) **SalesOutlook** [Home](#)

AMBITIOUS ENTERPRISES LLC >

Customer / Buyer >

Prospect >

(770) 910-2425 >


Update Address >

3070 MAIN STREET
ATLANTA
GA 30005

Contacts >

Notes >

Opportunities >



Viewing and Creating Account Notes

Click on notes to see the notes for the account.

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Back Notes Home

New Account Note

Items for AMBITIOUS ENTERPRISES LLC

Last Update: 1/4/2013 11:30:08 AM

Filter items...

- Appointment - schedule appt for next wed - AMBITIOUS ENTERPRISES LLC , JOE FRIDAY
- schedule appt for next wed
- JOE FRIDAY (AMBITIOUS ENTERPRISES LLC) Opportunity: Hotel lobby -
- Task - Notes for Meeting with Eric Peterson - AMBITIOUS ENTERPRISES LLC , JOE FRIDAY
- Notes for Meeting with Eric Peterson
- JOE FRIDAY (AMBITIOUS ENTERPRISES LLC) - Complete: Lead Qualified
- JOE FRIDAY (AMBITIOUS ENTERPRISES LLC) Opportunity: Hotel lobby -
- Task - train g for lance - AMBITIOUS ENTERPRISES LLC , JOE FRIDAY
- train g for lance
- RE: QuickBooks Online Essentials: your credit card has been declined

Click on New Account Note to create a new note.

The screenshot shows a web browser window titled "SalesOutlook Web". Inside the window, there is a form titled "New Note for AMBITIOUS ENTERPRISES LLC". The form contains three input fields: "Note Type", "Subject", and "Note body". Below the "Note body" field is a large blue button labeled "Save".

Creating an Account Opportunity

Click on opportunities then click on create a new opportunity.

The screenshot shows the "Notes" interface in SalesOutlook Web. At the top, there are "Back" and "Home" buttons. Below them is a "New Opportunity" button with a right-pointing arrow. Underneath is the text "Items for AMBITIOUS ENTERPRISES LLC" and "Last Update: 11/28/2012 2:44:19 PM". There is a search bar labeled "Filter items...". Below the search bar is a list of three items, each with a right-pointing arrow:

- AMBITIOUS ENTERPRISES LLC
- AMBITIOUS ENTERPRISES LLC
- AMBITIOUS ENTERPRISES

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Enter the information and click on Save.

SalesOutlook Web

New Opportunity for AMBITIOUS ENTERPRISES LLC

Opportunity Name

Product

Total\$

Expected Close Date

Save

Working with Account Contacts

My Contacts

Back Home

New Contact

Filter items...

- Aimee Celine
- BARRY GREENBERG
- BILLY BOB
- Catherine Walker
- Copper Link Pro
- Corey Savage
- Dan Sundin
- Dave Dillon
- David Hinson

Create Contact

First Name

Last Name

Email Address

Phone

Mobile

Street

City

State

Zip

Save

[Back](#) **Contacts** [Home](#)

New

[New Contact](#)

Search Contacts

[Search Contact](#)

[List My Contacts](#)

[List My Flagged Contacts](#)

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[Back](#) SalesOutlook [Home](#)

- AAAA BBBB
- WORK: 1234
- CELL: ASDAS
-
- Update Address
Test Web
street
city st
- Notes
- Opportunities
- Customer Service

[Back](#) Opportunities [Home](#)

Search Opportunities

- Search Opportunities
- List My Opportunities

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