



# CRM Solutions

by LeadMaster

2020

## APP4 Features

**DESIGN TEAM**

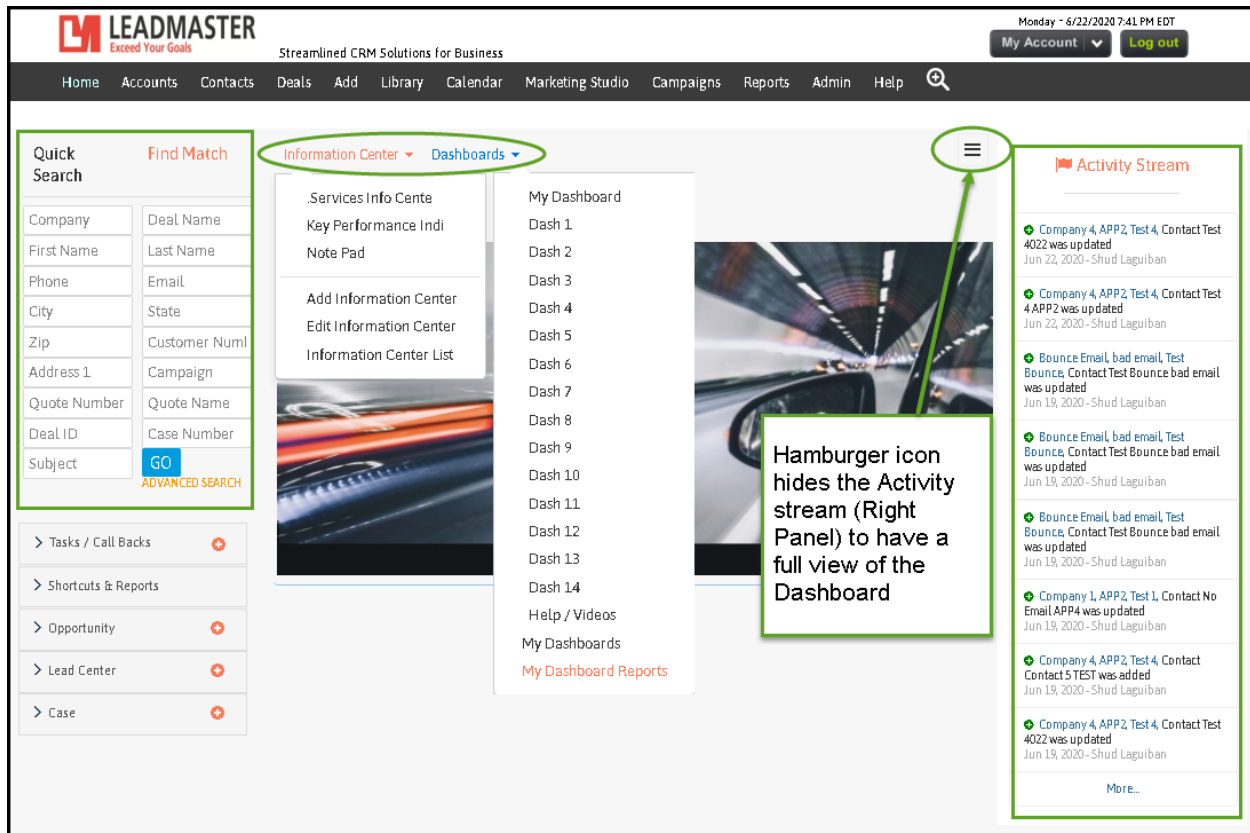
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## HOME Page

The Home page brings a cleaner look with enhancements made for the Menus, Quick Search and Activity Stream.



### 1. Quick Search functionality – Auto Suggest feature

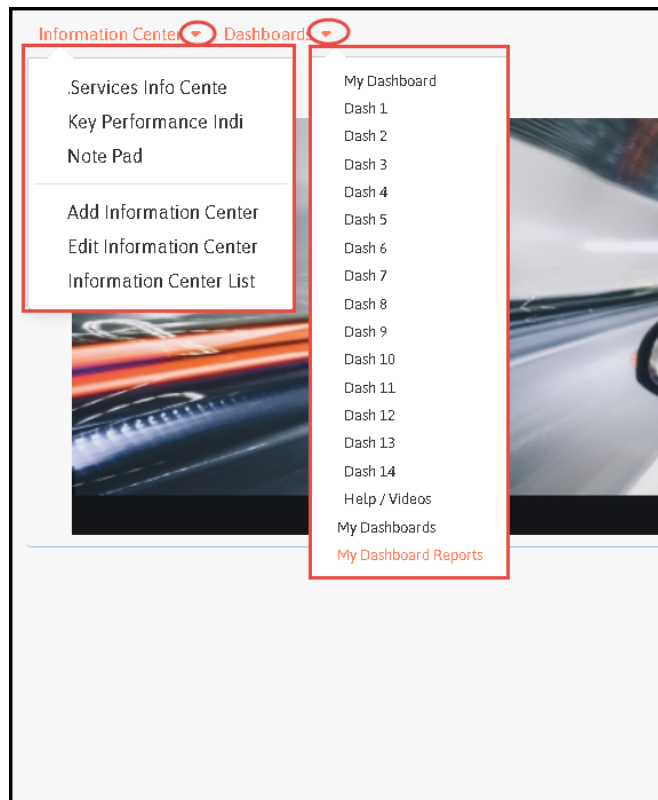
- It provides you the list of existing data that you can easily select according to the typed values in the Quick Search fields.

### 2. CASE ID and CASE Subject are added in Quick Search

- For quick search of Case by Case number and Case Subject.

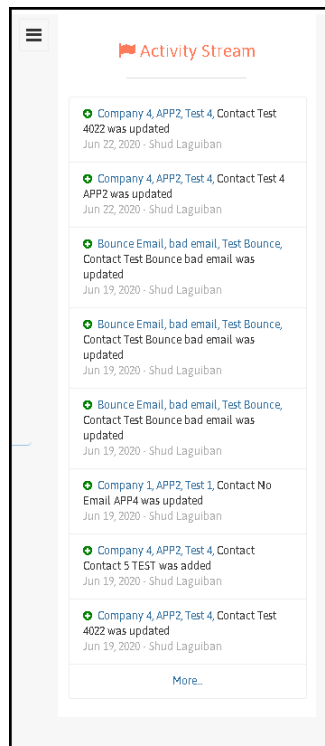
### 3. Consolidated Menus – Information Center, Dashboards

- The options are organized on each category, when you click on the drop-down beside each Menu, your Sub-Menus will be found here.



#### 4. Activity Stream (Right Panel)

- the Right panel is utilized for the Activity Stream, which displays the latest activities that have happened with Records in the Database. You can hide this panel when you click on the 3 lines(Hamburger icon).



## RECORD Page

### 5. Left and Right Accordion menus when inside a Record.

- Convenience on the Record page when viewing, it shows a lot more even without needing to scroll down on the page.

The screenshot shows the LeadMaster CRM interface. On the left is a 'Left Menu - Conta... (4)' accordion with sections like 'Contact History', 'Email History', 'Opportunities (1)', and 'Quotes (1)'. The main area displays 'Sales Update' for 'shud test' with tabs for 'TEST', 'CLOSED-WON', 'CLOSED-LOST', 'DEAD', and 'DID NOT REACH'. Below these are sections for 'Quick Actions', 'Customer Actions', 'Comments / Notes', and 'Cases'. On the right is a 'Call Backs and...' accordion showing a list of appointments and tasks. A green box highlights the 'Left accordion brings you additional details of the Contacts, including details of Contact Histories, Email Histories, Tied Opportunities, Quotes and Cases.' Another green box highlights the 'Right accordions provide convenience in displaying details that you used to scroll down the page. This can be edited to select what to display.'

- Contact details display on the left accordion, as well as the Email History of each Contact when clicked

The screenshot shows the LeadMaster CRM interface for a contact named 'Test 4 APP2'. The left accordion shows 'Contact History' and 'Email History'. The main area displays 'Sales Update' for 'Company 4' with tabs for 'PROPOSAL' and 'APPROVED'. Below these are sections for 'Customer Actions', 'Comments / Notes', and 'Cases'. On the right is a 'Call Backs and...' accordion showing a list of appointments and tasks. A red box highlights the 'Each contact displays details and the Email address can be clicked to send an Email'. Another red box highlights the 'While the mid part of the page is static, the left accordion inside the Record can be scrolled up & down'.

#### 4. Modal display view on all related pages

- The link to edit the contact, open the Opportunity, Quotes and Cases within the record opens in a modal display to stay on the same screen without any chance of getting lost in multiple windows. This goes with adding new and opening existing Events, Custom Forms and even sending Emails.

The screenshot displays the LEADMASTER CRM interface. At the top, the header includes the LEADMASTER logo, the tagline 'Streamlined CRM Solutions for Business', and a navigation bar with links: Home, Accounts, Contacts, Deals, Add, Library, Calendar, Marketing Studio, Campaigns, Reports, Admin, and Help. A search icon is also present. The main content area is partially obscured by a modal window titled 'Edit Quote'. The modal has a close button (X) in the top right corner. Inside the modal, there are two tabs: 'Actions' and 'Add'. The 'Quote Details - Test 4 APP2' section contains the following fields: Company (Company 4), Date Created (4/27/2020), Last Updated (5/27/2020 - Shud Laguiban), Quote Name (Test 4 APP2), Quote Number (10651), Key Contact (Test 4022), Date (4/27/2020), Discount Available (checkbox), Taxable (checkbox), Tax Rate (input field with %), and Quote Template (Default). Below this is an 'Attached Files' section with the message 'No Details Available.' and buttons for SUBMIT, DELETE, and CANCEL. The background shows a sidebar with a 'Quick Search' bar and a list of contacts, and a main area with a 'Comments / Notes' section.

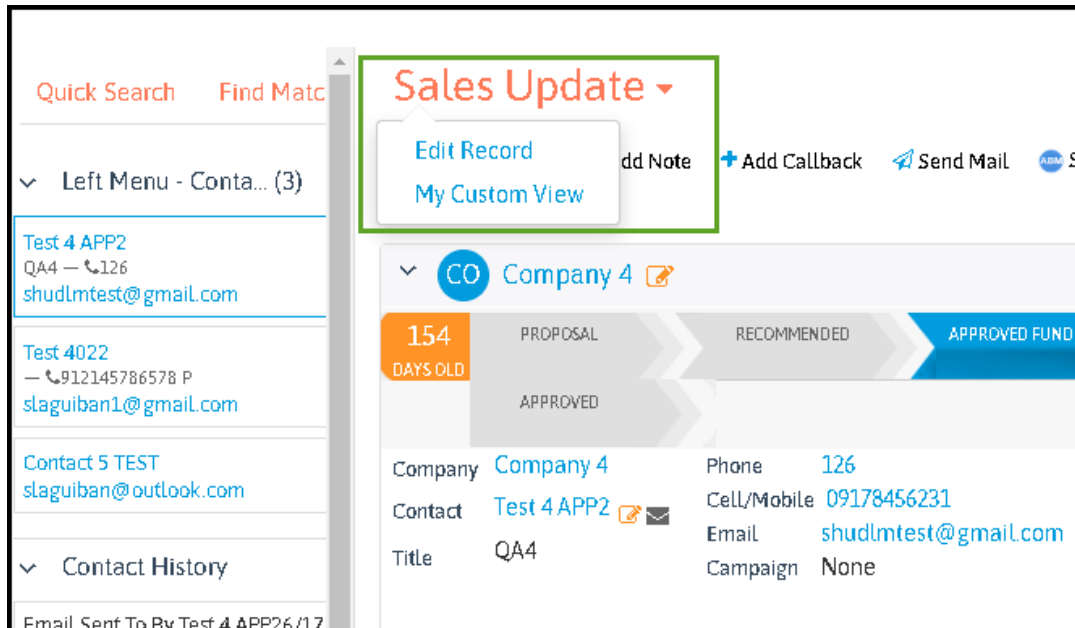
#### 5. Productivity Shortcuts

- Quick access of adding Notes, Callbacks. Sending E-mail and Sales Xtreme. This can be edited in the Customize Pages feature available in Administration.

The screenshot displays the LEADMASTER CRM interface. At the top, the header includes the LEADMASTER logo, the tagline 'Streamlined CRM Solutions for Business', and a navigation bar with links: Home, Accounts, Contacts, Deals, Add, Library, Calendar, Marketing Studio, Campaigns, Reports, Admin, and Help. A search icon is also present. The main content area is partially obscured by a modal window titled 'Sales Update'. The modal has a close button (X) in the top right corner. Inside the modal, there are two tabs: 'Actions' and 'Add'. The 'Sales Update' section contains the following fields: Company (Technology Interactive Group Inc.), Phone (901-459-1617), Acct Mgr (Shelia Jones), Contact (Bill Butler), Cell/Mobile (input field), Inside Rep (Bob Jones), Email (BButler@scmadmn.com), Progress Bar Shows (Lead Stage), Title (Owner), Campaign (Website Enquiry), Referred By (input field), and Custom Date (input field). Below this is a 'Quick Actions' section with checkboxes for: Did Not Reach, Assign, Closed/Won, Add to InfoTrack, Left Information, Provided Referral, Client Profile, Appt. Set, Meet and Greet, and Face-2-Face Meeting. A green arrow points to the 'Add Note', 'Add Callback', 'Send Mail', and 'Sales Xtreme' buttons in the top right corner of the modal.

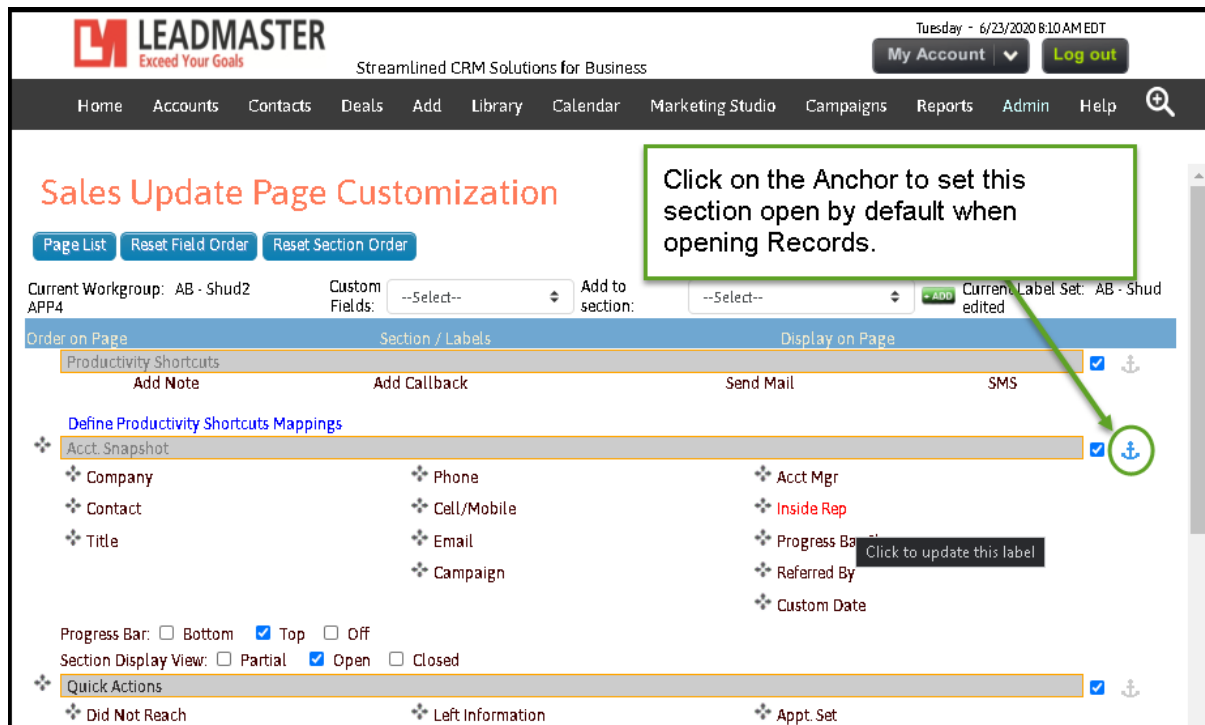
## 6. Switching of the Page View is consolidated in a drop-down menu

- click on the drop-down arrow beside the page name, select the Page you want to see. This can also be edited in the Customize Pages in Admin Menu. Default page can also be set in the Other Settings in Account Settings.



## 7. Section Anchors in Page Customization

- Anchors can be set enabled in the Customize Page in Admin to set which sections to display open by default





**LEADMASTER**  
Exceed Your Goals

Streamlined CRM Solutions for Business

Tuesday - 6/23/2020 8:18 AM EDT  
My Account Log out

Home Accounts Contacts Deals Add Library Calendar Marketing Studio Campaigns Reports Admin Help

Quick Search Find Match

Left Menu - Conta... (3)

Test 4 APP2  
QA4 - 126  
shudintest@gmail.com

Test 4022  
- 912145786578 P  
slaguiban1@gmail.com

Contact 5 TEST  
slaguiban@outlook.com

Contact History

Email Sent To By Test 4 APP26/17

Email opened on 5/19/2020 12:00 PM By Test 4 APP25/19

Email History

Step 1 of LN - Email  
Test 4 APP2  
6/19/2020

OptOut APP4 Test

**Sales Update**

Actions

+ Add Note + Add Callback Send Mail Sales-Xtreme Send Text

UPDATE

CO Company 4

155 DAYS OLD

PROPOSAL RECOMMENDED APPROVED FUNDING APPROVED

Company Company 4 Phone 126  
Contact Test 4 APP2 Cell/Mobile 09178456231  
Title QA4 Email shudintest@gmail.com  
Campaign None

Acct Mgr None  
Inside Rep None  
Progress Bar Shows Lead Stage  
Referred By  
Custom Date

Call Backs and...

6/20/2020 12:00 PM  
Contact 5 TEST  
Appointment.

6/20/2020 12:00 PM  
Test 4022  
Appointment.

6/20/2020 12:00 PM  
Test 4 APP2  
Appointment, 126

Custom Forms

Attached Files

Current Result...

MORE

UPDATE

This section is anchored in the Customize Pages and displays open by default when opening Records. The other sections can be seen when 'MORE' button is clicked.

## 8. Account Snapshot Section Display View

- There are 3 options – Partial, Open and Closed. It displays the Account Snapshot partially opened when Partial is selected, fully opened section when Open is selected and Closed section when Closed is selected.

**Sales Update Page Customization**

Page List Reset Field Order Reset Section Order

Current Workgroup: AB - Shud2 APP4 Custom Fields: --Select--

Order on Page Section / Labels

Productivity Shortcuts

Add Note Add Callback

Define Productivity Shortcuts Mappings

❖ Acct. Snapshot

❖ Company ❖ Phone

❖ Contact ❖ Cell/Mobile

❖ Title ❖ Email

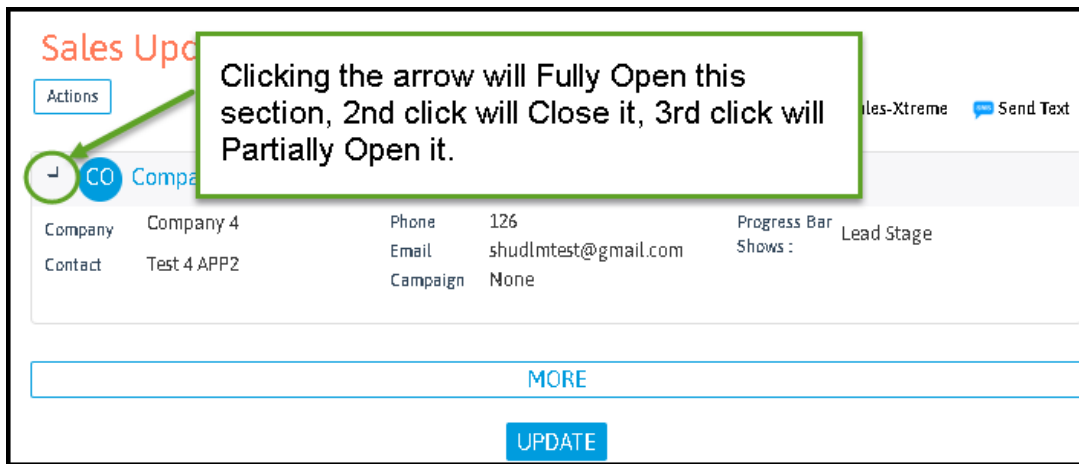
❖ Campaign

Progress Bar: ☐ Bottom ☒ Top ☐ Off

Section Display View: ☒ Partial ☐ Open ☐ Closed

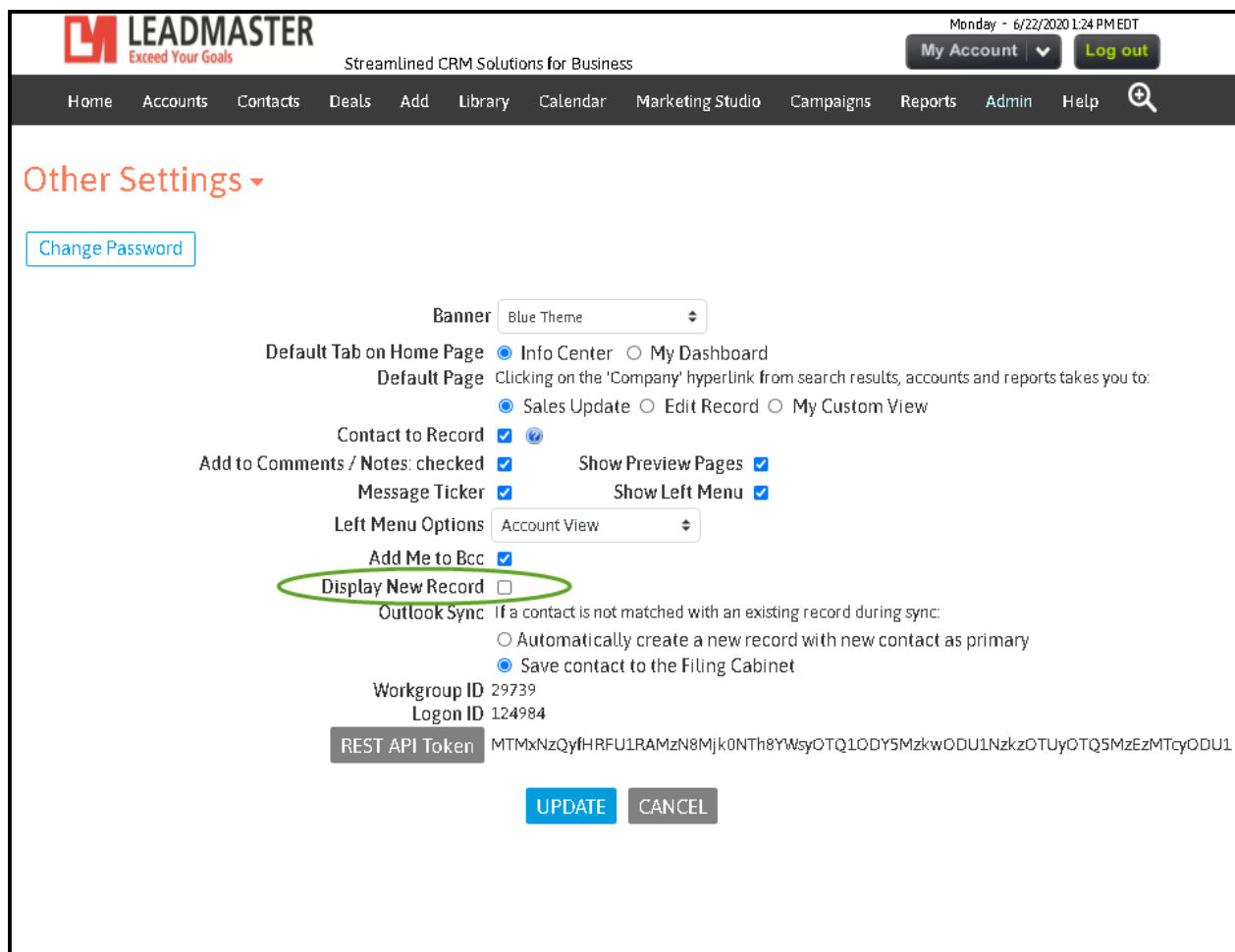
❖ Quick Actions

❖ Did Not Reach ❖ Left Information



## 9. Display new Record settings

- Display New Record can be set permanently so you don't need to check the Display new record checkbox each time you add a new record.



## CONTACT / EVENT / OPPORTUNITY / QUOTE Page

### 10. Improvements in User Interface

- The same as in Record page, you will see added features to manage your Contacts.

**Update Contact Information**

Actions Add

+ Add Note + Add Callback Send Mail Send Text UPDATE

TC TEST, Contact 5 - Mr

Date Created: 6/19/2020 Last Updated: 6/24/2020 - Shud Laguiban

First Name: Contact 5 Company: LeadMaster Referred By: Company 1

Last Name: TEST Email: shudlmtest@gmail.com Email Marketing Permission: Opt-in

Zip: 30075 Country: UNITED STATES

☐ Use primary contact address ☐ Use primary contact phone

UPDATE

Clicking the arrow will Fully Open this section, 2nd click will Close it, 3rd click will Partially Open it.

Contact Info section now has edit icon next to header text. Click on this icon should open Contact Info section so that fields within sections can be edit

Productivity shortcut icons are added in contact page - Add Note, Add Callback, Send Mail

6/22/2020

Custom Radio: ☒ 1 ☐ 2 ☐ 3

Preferred SMS Contact: Cell/Mobile

UPDATE

Contact Notes

B I U S P

## 11. Ability to attach files on Contact level

- Attach files on each Contact of the Record to have files more organized as compared to attaching all the documents and IDs in a single Record.

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Tuesday - 6/23/2020 12:46 PM EDT  
My Account Log out

Home Accounts Contacts Deals Add Library Calendar Marketing Studio Campaigns Reports Admin Help

**Update Contact Information**

Actions Add

+ Add Note + Add Callback Send Mail Send Text UPDATE

AT APP2, Test 4 - QA4

Date Created: 1/20/2020 Last Updated: 6/22/2020 - Shud Laguiban

First Name: Test 4 Company: Company 4 Referred By:

Last Name: APP2 Email: shudlmtest@gmail.com Email Marketing Permission: Opt-in

Title: QA4 Phone: 126 Calling Permission: Ok to Call

Address 1: 7147 Franc Lane Cell/Mobile: 09178456231 Opportunity Case:

City: Paranaque Alt Phone: 134 Fax: 09174562789

State: AK Address 3: Custom Date: 6/22/2020

Zip: 1700 Address 2: Custom Radio: ☒ 1 ☐ 2 ☐ 3

Country: Philippines Preferred SMS Contact: Cell/Mobile

UPDATE

Contact Notes

Attached Files

Date Uploaded	Document Name	Size	
6/23/2020 5:34:50 PM	3837_dev4.pdf	89 KB	

Custom Forms

Activity History

Email History

## 12. Events Page

- The events page opens in Modal display and improvements in the User Interface. For reference comparison with APP2, below are 2 images that each fields.

**Edit Appt / Call Back**

Print Email Calendar Help Guide

Call Back/Event Details

Company: Company Name Primary Contact: APP4 TEST Date Created: Jun/25/2020 - Shud Laguban Last Updated: Jun/25/2020 - Shud Laguban

A ★ indicates a required field

Type: Appointment

Meeting / Event Name: EVENT NAME

Phone: +639177037899

Date: 6/27/2020

Time: ☐ This is an all day or multi day event ☒ Starts at 8:30 AM Duration: 0 hrs 0 mins

Reminder: ☐ None

Opportunity: Case

Appt / Call Back: Repeats weekly Every: 1 weeks Starting on: 6/27/2020 Ending: ☐ On 6/25/2020 ☐ After 0 occurrences ☒ Never

Repeats on: ☐ Sun ☐ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☒ Sat

Description: This is the Comments / Notes section

☒ Add to Comments / Notes: (max length 10,000 characters) ☐ Done

Participants

Contacts: Third 3rd Contact Fourth 4th Contact

Contact Attendees: Second 2nd Contact APP4 TEST

Group List: Administrator ShudLxk Test Account Acct Mgr Atlantic - CRMTool 1.4.0

Group List Attendees: Administrator Demo User

SUBMIT Delete Cancel

**Edit Appt / Call Back**

Actions Calendar

Company: Company Name Primary Contact: APP4 TEST

EVENT NAME

6/27/2020 8:30am 9:30am 6/25/2020

Appointment

+639177037899

This is the Comments / Notes section

Date Created: Jun/25/2020 - Shud Laguban Last Updated: Jun/25/2020 - Shud Laguban

Repeat every: 1 weeks Repeat on: S M T W T F S

Ends: ☐ On 6/25/2020 ☐ After 0 occurrences ☒ Never

Group List Attendees: Second 2nd Contact APP4 TEST Demo User

SUBMIT DELETE CANCEL

## 13. Opportunity / Quote Page

- These pages open in Modal window display and improvements in the User Interface.

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Friday - 6/26/2020 1:56 AM EDT

My Account Log out

Home Accounts Contacts Deals Add Library Calendar Marketing Studio Campaigns Reports Admin Help

Quick Search

Left Menu - C

Tony Smith

Owner — 305-925-0300

TSmith@aol.com

Contact History

Email History

Opportunities

XR8000 DEAL

\$19,000.00 - 4/1/2019

Quotes (1)

Tony Smith

\$0.00

Actions

SUBMIT

Solution Details

ADD ITEM

Product	Remarks	Product Code	Price	Quantity	Amount	Discount	TaxCode	Recur	# of Months
XR8000	Network Adaptor	45-114	200.00	95	\$19,000.00	0%		<input type="checkbox"/>	
Sub total:					\$19,000.00				
TOTAL VALUE:					\$19,000.00				

Deal Details - XR8000 DEAL

Company: InterWorld Inc.

Deal ID: 199350

Date Created: 1/22/2003 11:01 PM

Last Updated: 6/26/2020 1:59 AM - Shud Laguiban

Deal Name

XR8000 DEAL

Opportunity Type

Deal Description

XR8000 DEAL in APP4

Deal Notes

26-Jun-2020 1:59 AM EDT (Shud Laguiban) - Opportunity Notes here....

Edit Comments

Quote

Quote Name	Quote Number	Date	Total	Updated
Tony Smith	10673	6/26/2020	\$0.00	6/26/2020
TOTAL			\$0.00	

Attached Files

Custom Forms

**LEADMASTER**  
Exceed Your Goals

Streamlined CRM Solutions for Business

Friday - 6/26/2020 1:56 AM EDT

My Account Log out

Home Accounts Contacts Deals Add Library Calendar Marketing Studio Campaigns Reports Admin Help

Quick Search

Left Menu - C

Tony Smith

Owner — 305-925-0300

TSmith@aol.com

Contact History

Email History

Opportunities

XR8000 DEAL

\$19,000.00 - 4/1/2019

Quotes (1)

Tony Smith

\$0.00

Actions

Add

Quote Details - Tony Smith

Company: InterWorld Inc.

Date Created: 6/26/2020

Last Updated: 6/26/2020 - Shud Laguiban

Quote Name

Tony Smith

Quote Number

10673

Key Contact

Tony Smith

Date

6/26/2020

Discount Available

☐

Tax Rate

%

Taxable

☐

Quote Template

Default

Attached Files

Date Uploaded	Document Name	Size
6/26/2020 2:00:13 AM	Email_Campaigns.docx	433 KB

SUBMIT

DELETE

CANCEL

## CRM-XPRESS

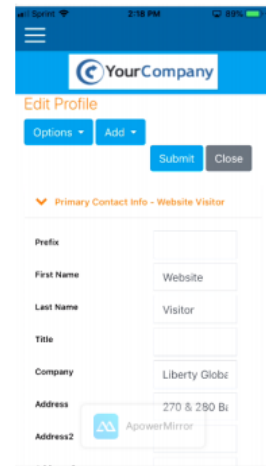
### 14. CRM –XPRESS, a Cost Effective option

- CRM-Xpress gives your sales people access to all of their accounts in 3 easy views: the accounts list, the company view and the contact view. CRM-Xpress was designed for people on the go. You can use it in a browser, on a phone or tablet in an APP. For more details, please visit this link:

<https://www.leadmaster.com/crm-xpress-3-2/>

# Why CRM-Xpress?

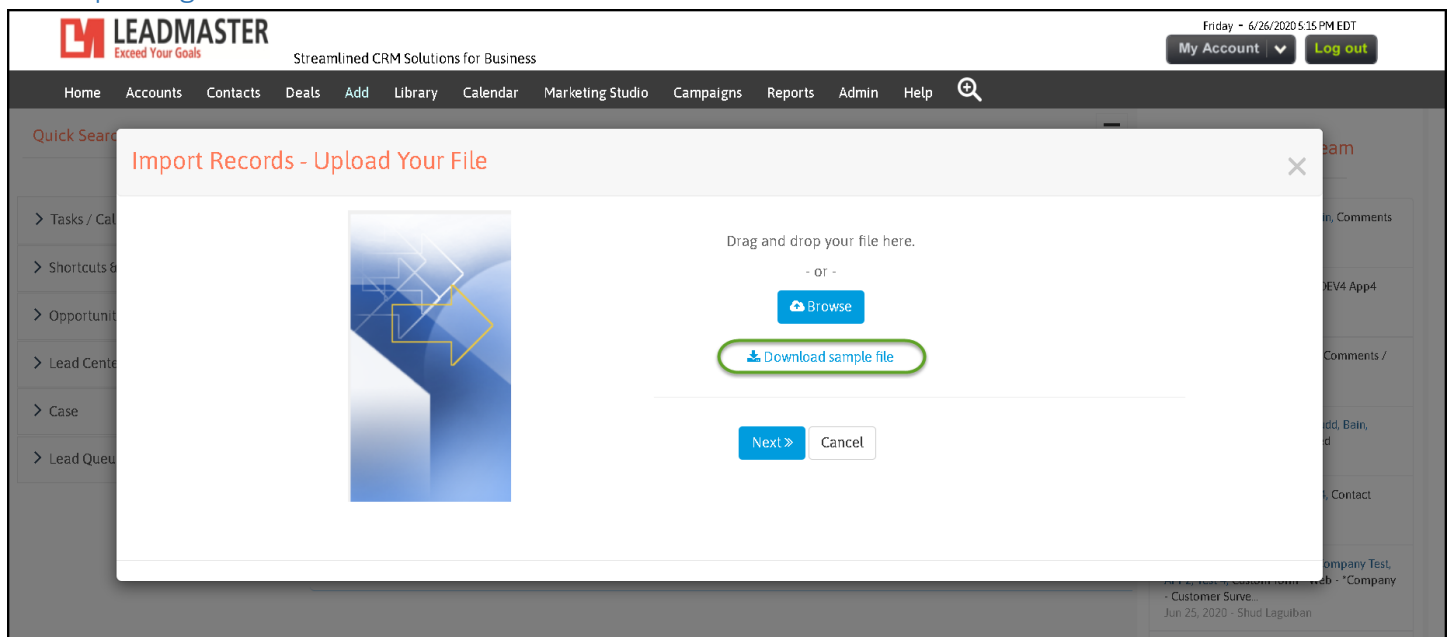
- Easy to learn & use.
- Rich set of features.
- Cost effective.

A screenshot of a mobile application interface for 'YourCompany'. The screen displays an 'Edit Profile' form with fields for Prefix, First Name (Website), Last Name (Visitor), Title, Company (Liberty Global), Address (270 & 290 B), and Address2 (ApowerMirror). There are 'Options', 'Add', 'Submit', and 'Close' buttons at the top.

**CRM-Xpress**

## IMPORT RECORDS

### 15. Importing Records Enhancements

A screenshot of the LEADMASTER web application interface. The top navigation bar includes links for Home, Accounts, Contacts, Deals, Add, Library, Calendar, Marketing Studio, Campaigns, Reports, Admin, and Help. A modal dialog box titled 'Import Records - Upload Your File' is open, featuring a large blue graphic on the left and a file upload area on the right. The upload area contains the text 'Drag and drop your file here.', a 'Browse' button, a 'Download sample file' link (highlighted with a green circle), and 'Next' and 'Cancel' buttons at the bottom.

- A sample of CSV file where you can directly use for importing, can be downloaded from the link and it will give you a clean, clear cut sample of how your sheet should like when importing records, and you can paste in data values according from each column in the file.

NOTE: There should be no trailing spaces at the beginning and end of values in each cell.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	FirstName	LastName	Title	Phone	Email	Company	Address1	City	State	Zip	Country	PRI_PHONE	User_Field_5	User_Field_26	User_Field_27	Lead Source	Customer	Contacted	Entered
2	Steve	Richards	Owner	904-224-5546	srichardson@northland.com	Northland Power	3345 Pow	Jacksonvil	FL	34554	USA	www.nort	\$270,000,	3346789	3345670		2234567	01-Jan-00	6/19/2
3	Scott	Pauls	Owner	910-236-4368	spauls@nr.infi.net	Shaw Industries	616 Waln	Dalton	GA	30720	USA	www.shaw	\$2,000,00	969413897	968224949	TSS	6252	01-Jan-00	6/19/2
4	Lance	Doyle	Owner	540-284-2211	LDoyle@usa.dupont.com	Indyco	925 Indus	Brookhav	VA	22980	USA	www.esri	\$2,000,00	969006725	969312644	SPECTOR	7739	01-Jan-00	6/19/2
5	Joyce	Brown	Owner	334-577-9749	JBrown@cbasc.com	In-Flow LLC	2445 M St	Washingt	AL	36553	USA	www.shi.c	\$350,000,	36968709	968318923	TEAMCO	10141	01-Jan-00	6/19/2
6	Terry	Morrisroe	Owner	904-829-9411	TMorrisroe@somed.com	Internet Southeast Inc	Boone	FL		32216	USA	www.geca	\$75,000,0	5070479	969312644	TEAMCO	7780	01-Jan-00	6/19/2
7	Judith	Kisielewski	Owner	803-974-1000	JKisielewski@wellmaninc.com	NewBride 2000 Inc	35 Memoi	Pinehurst	SC	29532	USA	www.spac	\$100,000,	969335082	968224949	TSS	6413	01-Jan-00	6/19/2
8	Simeon	Pandak	Owner	770-286-2000	SPandak@spanner.com	Shelbynet Inc	1900 Mas	Washingt	GA	30253	07 USA	www.osag	\$250,000,	969904838	968522078	SPECTOR	4934	01-Jan-00	6/19/2
9																			
10																			
11																			

- The Import process automatically does the match for you, as APP4 detects the Header and matches it with the fields in the system, and it gives more convenience on going forward with importing the records in the system.

**Import Records - Match Fields**

Please match the fields in your import to the available fields. When finished, click [Next].

Fields from your file

- FirstName
- LastName
- Title
- Phone
- Email
- Company
- Address1
- City
- State
- Zip
- Country
- PRI\_PHONE3
- User\_Field\_5
- User\_Field\_26
- User\_Field\_27

Available Fields

- Import File Attachment
- Assign Mgr First Name
- Assign Mgr Last Name
- Assign Rep First Name
- Assign Rep Last Name
- Call Back Type
- Call Back Start Date
- Call Back Start Time
- Call Back End Date
- Call Back End Time
- Call Back Assignee First Name
- Call Back Assignee Last Name
- First Name
- Last Name
- Title

Matched Fields

- FirstName - First Name
- LastName - Last Name
- Title - Title
- Phone - Phone
- Email - Email
- Company - Company

- APP4's Import Wizard saves you time and clicks by letting you choose from the 4 options. If none of them are applicable on your import (Import into Custom Form, Assignment, more than 1 Contacts in a record and managing Duplicates).

**Import Wizard - Advanced Options**

Please select any of the following Advanced Options or click [Next].

☐ Import field into custom form(s)
 ☐ Record Assignment
 ☐ Import multiple contacts to a company record
 ☐ Check for Duplicates

- You're all set just after a few clicks.

Import Wizard - Summary

Before final import, you can save your template for future imports. If you import a new file but had additional change, click [Save As] to store the revised template.

Click [Finish] to begin the import process. Click [cancel] to cancel the import.

Template: New Template

Number of Records: 7

Save Template

Preview

Finish

Cancel

## SEARCH RESULTS

### 15. Kanban View in Search Results

- You can view the Search Results using Kanban View to manage tasks and have a perfect flow visualization of your Leads, Opportunities and Cases.

LEADMASTER

Exceed Your Goals

Streamlined CRM Solutions for Business

Home

Accounts

Contacts

Deals

Add

Library

Calendar

Marketing Studio

Campaigns

Reports

Admin

Help

Quick Search Find Match

Search Results

Page Options

Record Options

Click to Kanban this search

Company

GO

> Tasks / Call Backs

> Shortcuts & Reports

> Opportunity

> Lead Center

> Case

Company			City	State	Contact	Phone
<input type="checkbox"/> TEST	6/22/2020	kevil@yopmai			test, shud	+6391
<input type="checkbox"/> LeadMaster	6/22/2020	shudlmtest@g	Roswell	GA	App4, App4	
<input type="checkbox"/> Company 4	6/19/2020	shudlmtest@g	Paranaque		APP2, Test 4	126
<input type="checkbox"/> Bounce Email	6/19/2020	duhs22000@ya			bad email, Test	
<input type="checkbox"/> Company 1	6/19/2020	claguiban@gm			APP2, Test 1	+6392
<input type="checkbox"/> Company 2	6/19/2020	claguiban1@g			APP2, Test 2	124
<input type="checkbox"/> Company 3	6/19/2020	slaguiban@gm			APP2, Test 3	125
<input type="checkbox"/> LeadMaster	6/16/2020	shud@yahoo.c	Roswell	GA	Test, Terri	

- By clicking on the “Showing” button, it will give you 3 different views: Account Status, Lead Stage and Customer Status. It arranges the record for you to see which Lead is on what status.



## KANBAN VIEW

Search Results - Account Status						
Page Options	Showing					60 Records
No Account Status 3	NEW 4	INFO REQUEST 4	QUALIFIED 21	NOT VIABLE 3	NURTURE 0	DEAD 3
Dec3 Task Manager App4, App4	Jocel Inc Rites, Jon	Knightlock Technology Knight, Mike	Vantage Communication Ruff, Dan	Sunrise Inc Saveoff, Tom		3798a Linnard, Frank
LeadMaster App4, App4	3798a 3, Shud	Open Systems Lepere, Thomas	Lakeside MFG Grapen, Susan	Shelbynet Inc Panda, Linnard		TEST test, shud
Test with Shud App4, App4	Interweb Communications Byrd, Chris	Solution Manufacturing Rhodes, Bill	Overby Systems Inc Griffith, George	Internet Southeast Inc Morrisroe, Terry		Pine Industries Rickey, Lannis
3798c Linnard, Shud	Lakeland Net Direct Barrages, William	3798b Linnard, Frank	Company 3 APP2, Test 1			
3798e Linnard, Frank			Kent Network Sparks, Marvin			
39592 APP4, APP4			In-Flow LLC Brown, Joyce			

## 16. Color coded Values for Profile Summary fields in Accounts List, Search Results and in the Record.

- Viewing the Search Results is easier when you're looking at a Color-coded value. This applies to the fields in the Profile Summary section and the color-coded value can also be seen in the Record.

Search Results												
Page Options	Record Options	Activity Hub	Company	GO								
Lineage	Company	Last Updated	Email	City	State	Contact	Phone	Account Status	Entered	Campaign	More Info	Last Action
<input type="checkbox"/>	Overby Systems Inc	4/17/2020	GGriffith@ca	Farmville	NC	Griffith, Georg	919-278-4454	QUALIFIED	1/15/2018	Website Enqu		Updated by S
<input type="checkbox"/>	Sunrise Inc	4/17/2020	TSaveoff@cap	Jackson	NC	Saveoff, Tom	910-215-1000	NOT VIABLE	1/11/2018	Website Enqu		Updated by S
<input type="checkbox"/>	Pine Industries	4/17/2020	LRickey@logi	Lynchburg	VA	Rickey, Lannis	703-471-5701	DEAD	1/12/2018	Website Enqu		Updated by S
<input type="checkbox"/>	NewBride 2000 Inc	4/17/2020	JKisielewski	Pinehurst	SC	Kisielewski, Ju	803-974-1000	QUALIFIED	1/13/2018	Website Enqu		Updated by S
<input type="checkbox"/>	Link Communications	4/17/2020	SNielson@wil	Asheboro	NC	Nielson, Singh	919-626-2694	QUALIFIED	1/14/2018	Website Enqu		Updated by S
<input type="checkbox"/>	Technology Interacti	4/17/2020	BButler@scma	Augusta	TN	Butler, Bill	901-459-1617	QUALIFIED	1/16/2018	Website Enqu		Updated by S
<input type="checkbox"/>	Spencer Inc.	4/17/2020	ALittle@ebr2	Memphis	VA	Little, Allen	804-962-3526	QUALIFIED	1/17/2018	Website Enqu		Updated by S
<input type="checkbox"/>	Taylor Inc	4/17/2020	DNicoson@nsu	Jackson	FL	Nicoson, Don	954-656-3311	QUALIFIED	1/9/2018	Website Enqu		Updated by S
<input type="checkbox"/>	Shaw Industries	4/17/2020	spauls@nr.in	Dalton	GA	Pauls, Scott	910-236-4368	QUALIFIED	1/10/2018	Website Enqu		Updated by S
<input type="checkbox"/>	Info Outfitters	4/17/2020	DCalhoun@unc	Atlanta	NC	Calhoun, David	919-753-1600	QUALIFIED	1/29/2018	Tradeshaw		Updated by S
<input type="checkbox"/>	Indyco	4/17/2020	LDoyle@usa.d	Brookhaven	VA	Doyle, Lance	540-284-2211	QUALIFIED	1/18/2018	Tradeshaw		Updated by S
<input type="checkbox"/>	InterWorld Inc.	4/17/2020	TSmith@aol.c	Columbia	FL	Smith, Tony	305-925-0300	QUALIFIED	1/19/2018	Tradeshaw		Updated by S
<input type="checkbox"/>	Internet Southeast I	4/17/2020	TMorrisroe@x	Boone	FL	Morrisroe, Terr	904-829-9411	NOT VIABLE	1/20/2018	Tradeshaw		Updated by S
<input type="checkbox"/>	IndyLine Inc	4/17/2020	MNelson@aarp	Greenville	DC	Nelson, Mike	202-724-4062	QUALIFIED	1/21/2018	Tradeshaw		Updated by S
<input type="checkbox"/>	Interweb Communicati	4/17/2020	CByrd@prc.co	Clemson	VA	Byrd, Chris	703-424-3520	NEW	1/6/2018	Tradeshaw		Updated by S
<input type="checkbox"/>	Kent Network	4/17/2020	MSparks@aol	Washington	TN	Sparks, Marvin	615-271-7733	QUALIFIED	1/7/2018	Tradeshaw		Updated by S
<input type="checkbox"/>	In-Flow LLC	4/17/2020	JBrown@cibas	Washington	AL	Brown, Joyce	334-577-9749	QUALIFIED	1/8/2018	Tradeshaw		Updated by S
<input type="checkbox"/>	Kendall Connect	4/17/2020	MEpple-Ekhof	Clinton	GA	Epple-Ekhoff, M	770-895-8600	HAVE NOT REA	1/30/2018	Tradeshaw		Updated by S
<input type="checkbox"/>	Knightlock Technolog	4/17/2020	MKnight@scsn	St Petersburg	SC	Knight, Mike	803-663-6000	INFO REQUEST	1/31/2018	Tradeshaw		Updated by S
<input type="checkbox"/>	Open Systems	4/17/2020	TLepere@ddru	Pensacola	VA	Lepere, Thomas	703-559-6000	INFO REQUEST	2/1/2018	Customer		Updated by S

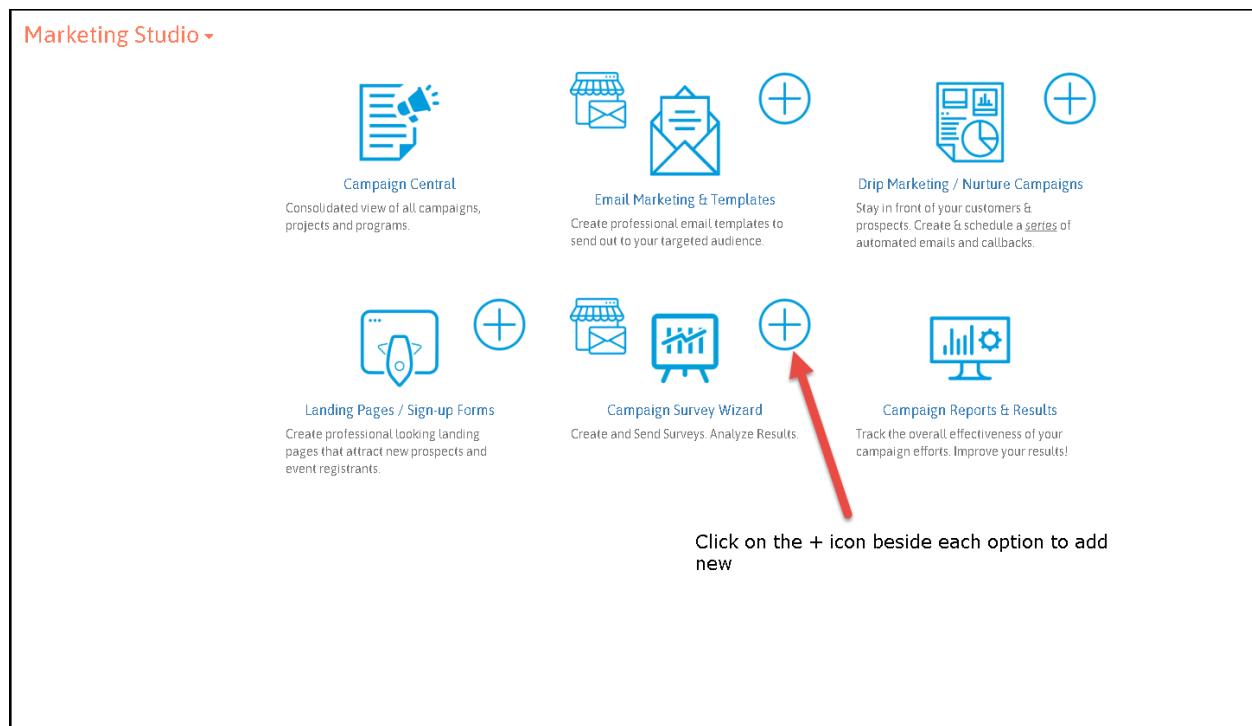
- Colored fields also apply when in the Record page

Add

## CAMPAIGNS and REPORTS

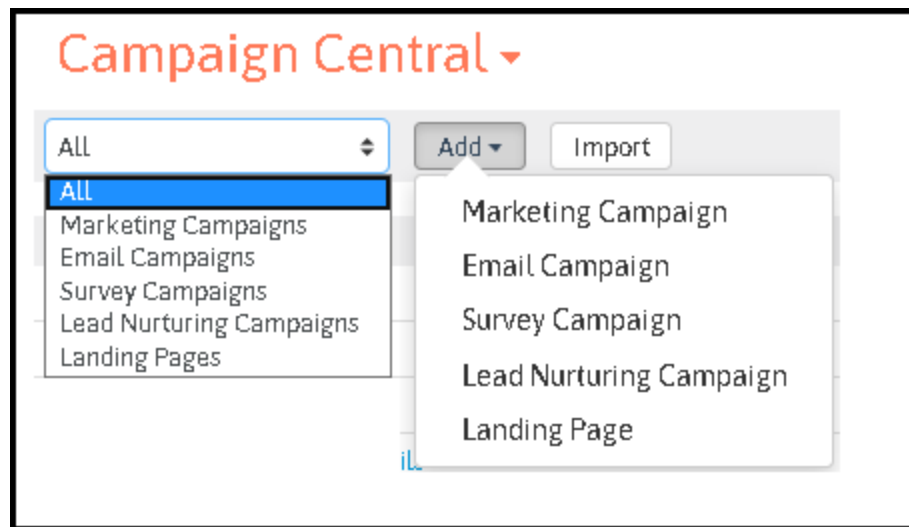
### 17. Marketing Studio

- This feature in APP4 allows you to manage your Campaigns easily by going into Campaign Central to view all existing Campaigns running, view your Email Templates, Drip/Lead Nurturing Campaign, Landing Pages/Sign-up forms, Survey Campaigns, and gives you visual reporting for e-Marketing Reports



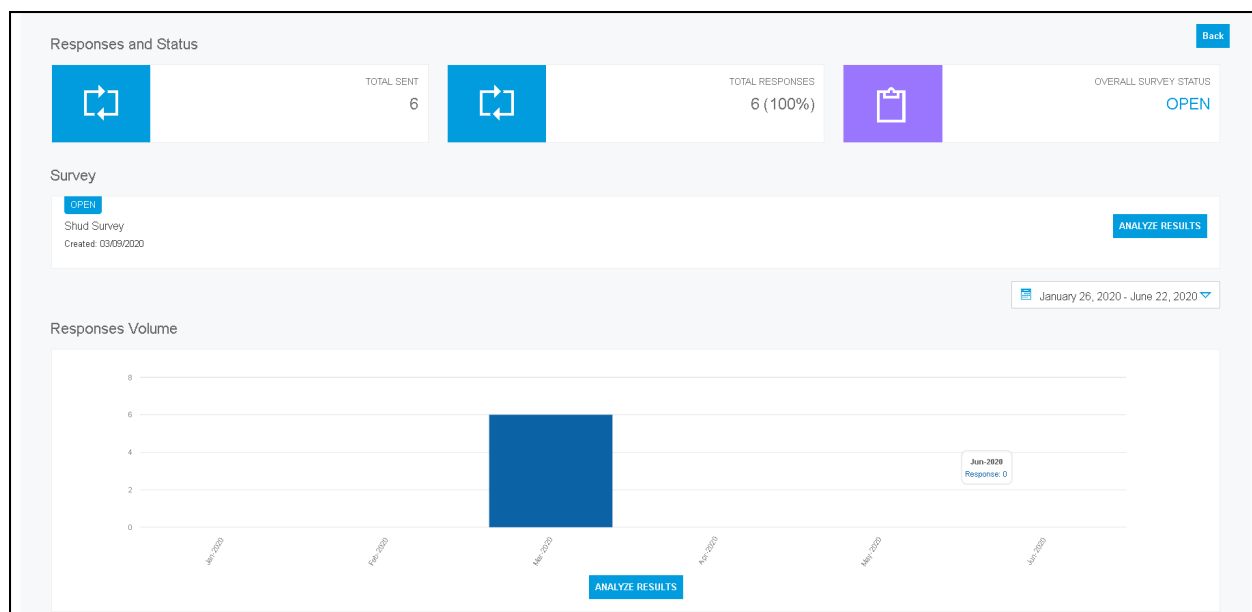
### 18. Campaign Central

- For management of Campaign in a single page, Campaign Central is where you can view all Campaigns or view by category, add different types of Campaigns and Import. Campaign Central can either be accessed from Campaigns (Banner Menu), click the drop-down beside Marketing Campaigns, then select Campaign Central.



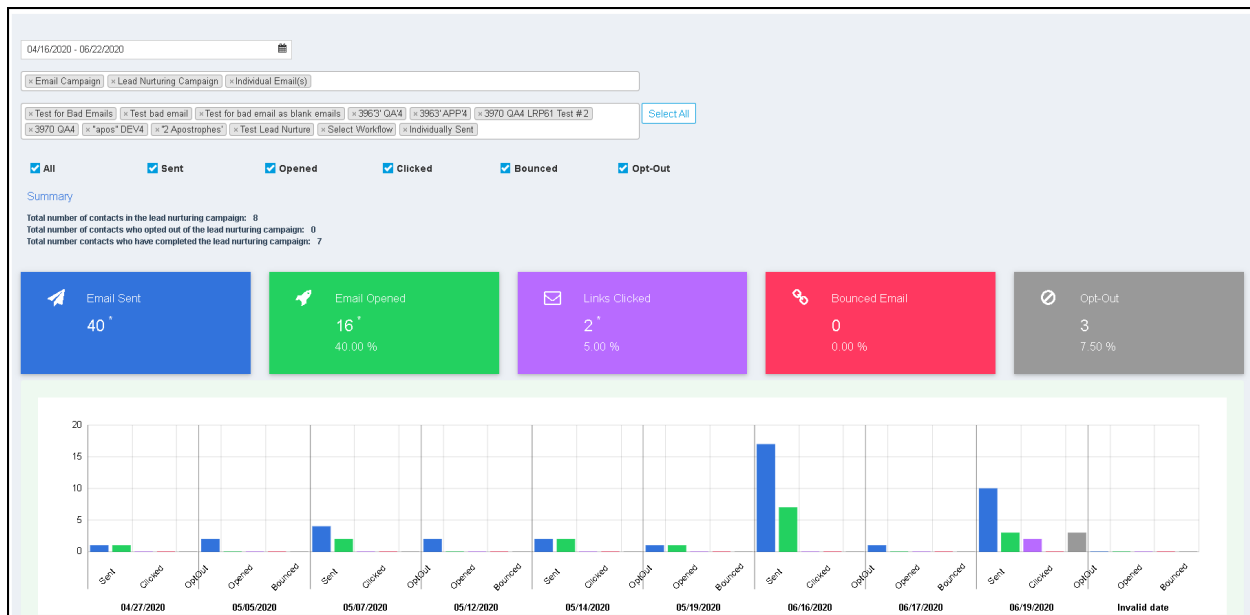
## 19. Survey Campaigns

- The Survey Campaign is designed to help you get feedback from your Contacts and is now available in APP4. Below is a sample Report from a Survey Campaign



## 20. eMarketing Reports

- Dynamic reporting of all Campaigns allows you to drill down on specific data.



## 19. Activity Reports - Mark All Open Appointments / Callbacks as Complete

- This is an added convenience for marking events as complete in the Report itself. This report can be accessed under Standard Reports.

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Wednesday - 6/24/2020 11:14 AM EDT  
My Account Log out

Home Accounts Contacts Deals Add Library Calendar Marketing Studio Campaigns Reports Admin Help

Where a contact has not been associated with the appt / call back, the primary contact (if present) for the record is listed in gray italics

### Call Backs & Tasks - Activity Report

17 appt / call backs

Sorted By: Acct Mgr, Start Time

Company	Contact	Action	City	State	Phone	Type	Meeting / Event Name	Created By	Start Time	End Time	Meeting Status	Acct Mgr
Company 2	Test 2 APP2				124	Appointment	LN Event Test 2		6/20/2020 12:00 PM EDT	6/20/2020 1:00 PM EDT	Open	
	Description:											
Company 3	Test 3 APP2				125	Appointment	LN Event Test 3		6/20/2020 12:00 PM EDT	6/20/2020 1:00 PM EDT	Open	
	Description:											

## WORKFLOW

### 21. Push Notification to the Account Manager or Partner Rep as action of workflow.

- Sends an SMS notification to the assigned Account Manager or Partner Rep once workflow is triggered by an action.

## Add Action

Help Guide

To create an Action, please select from the below options:

**Action**

- ☐ Add Appt / Call Back
- ☐ Update Record
- ☐ Send Email
- ☐ Add a(n) Activity
- ☐ Add Task
- ☐ Delete Record
- ☐ Follow Record

- ☐ Attach Custom Form
- ☐ Assign Record
- ☐ Add Ticker Message
- ☐ Send Text Message
- ☐ Upload Record
- ☐ Archive Record
- ☐ Update Quick Actions
- ☒ Push Notification

- ☐ Add to Lead Nurturing Track
- ☐ Stop Lead Nurturing Track
- ☐ Request an Update to the Record
- ☐ Add to Comments / Notes
- ☐ Add Opportunity
- ☐ Skip to

**Connectors**

- ☐ Send Fax

Next >>

Cancel

*This document is still under development and the features in APP4 are not limited to what is being shown here. Further APP4 Enhancements will be added in this document from time to time.*