



## Screenshots

Example of a CRM System customized for  
Office Supplies

# Accounts –

- 1) capture main items or purchase and other products of interest
- 2) system computes monthly potential of account based on employee size

Home Dashboard Opportunities **Accounts** Contacts Activities Calendar Emails Documents Reports Campaigns Quotes >>

Last Viewed: A A Will Materi A & A Services Eisel Insurance 21st Century Ro 1 Star Realty Pooja Dr. Wife CB Veronica SIM Media Inter

Shortcuts: Create Account Accounts Account Reports Import

**Accounts: A A Will Materials Corp** ? Help

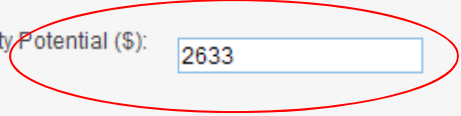
Save Cancel View Change Log

Save and Continue (2 of 1508)

**ACCOUNT INFORMATION**

Name: *	<input type="text" value="A A Will Materials Corp"/>	Phone Office:	<input type="text" value="781-333-0300"/>
Website:	<input type="text" value="www.aawillmaterials.com"/>	Fax:	<input type="text" value="781-297-9909"/>
1 Yr Sales Growth:	<input type="text"/>	Alternate Phone:	<input type="text"/>
Member of:	<input type="text"/> <input type="button" value="Select"/> <input type="button" value="Clear"/>	Employees:	<input type="text" value="50"/>
Ownership:	<input type="text"/>	Year Founded:	<input type="text"/>
Type of Company:	<input type="text" value="General"/> ▾	NAICS Code:	<input type="text" value="561990"/>
Application:	<input type="text" value="Office Supplies"/> ▾	Annual Revenue:	<input type="text" value="4.7"/>
Team: *	<input type="text"/> <input type="button" value="Clear"/>	Existing Supplies Vendor:	<input type="text" value="Not Known"/> ▾
Assigned to:	<input type="text"/> <input type="button" value="Clear"/>	Monthly Opportunity Potential (\$):	<input type="text" value="2633"/>
County:	<input type="text" value="Norfolk 15-50"/>	Charitable Institution:	<input type="checkbox"/>

[Example]



# Accounts –

- 3) capture current vendor
- 4) custom fields can be provided as needed on a case by case basis

Home Dashboard Opportunities **Accounts** Contacts Activities Calendar Emails Documents Reports Campaigns Quotes >>

Last Viewed: A A Will Materi A & A Services Eisel Insurance 21st Century Ro 1 Star Realty Pooja Dr. Wife CB Veronica SIM Media Inter

**Accounts: A A Will Materials Corp** ? Help

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Save and Continue (2 of 1508)

**ACCOUNT INFORMATION**

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Website:	<input type="text" value="www.aawillmaterials.com"/>	Fax:	<input type="text" value="781-297-9909"/>
1 Yr Sales Growth:	<input type="text"/>	Alternate Phone:	<input type="text"/>
Member of:	<input type="text"/> Select Clear	Employees:	<input type="text" value="50"/>
Ownership:	<input type="text"/>	Year Founded:	<input type="text"/>
Type of Company:	General	NAICS Code:	<input type="text"/>
Application:	Office Supplies	Annual Revenue:	<input type="text"/>
Team: *	Global Select Clear	Existing Supplies Vendor:	<input type="text"/>
Assigned to:	maria.pisapia Select Clear	Monthly Opportunity Potential (\$):	<input type="text" value="2633"/>
County:	Norfolk 15-50	Charitable Institution:	<input type="checkbox"/>

[Example]

- Not Known
- Staples
- WB Mason
- Office Depot
- Office Max
- Corporate Express
- Independent Dealer
- Regional / Other
- Only Online Purchases
- No Contract
- Not Known

# Accounts –

- 5) track purchases and wallet share relative to potential
- 6) monitor penetration and movement of penetration direction

[Example]

**ACCOUNT HISTORY AND PENETRATION**

Last Order Placed - Date:	<input type="text"/>	Average Order Size:	<input type="text"/>
Last Order - Value:	<input type="text"/>	Last 12 mos. Per Empl. Purchase:	<input type="text"/>
Customer Since:	<input type="text"/>	Penetration (%):	<input type="text"/>
Lifetime Revenues:	<input type="text"/>	Last 3 month Penetration:	<input type="text"/>
Cumulative # of Transactions:	<input type="text"/>	Increase / Decrease By (%):	<input type="text"/>

**EMAIL ADDRESS(ES)**

Email:  Primary  Opted Out  Invalid

[+ Add Address](#)

**ADDRESS INFORMATION**

Billing Address:	<input type="text" value="168 Washington St"/>	Shipping Address:	<input type="text"/>
City:	<input type="text" value="Stoughton"/>	City:	<input type="text"/>
State:	<input type="text" value="Massachusetts"/>	State:	<input type="text"/>
Postal Code:	<input type="text" value="02072-1748"/>	Postal Code:	<input type="text"/>
Country:	<input type="text"/>	Country:	<input type="text"/>

Copy address from left:

# Contacts –

- 1) capture detailed contact information including email address
- 2) screen can be customized as desired

Home Dashboard Opportunities Accounts **Contacts** Activities Calendar Emails Documents Reports Campaigns Quotes >>

Last Viewed: Frank Will A A Will Materi A & A Services Eisel Insurance 21st Century Ro 1 Star Realty Pooja Dr. Wife CB Veronica

**Contacts: Frank Will** [Print](#) [Help](#)

[Edit](#) [Duplicate](#) [Delete](#) [Find Duplicates](#) [Manage Subscriptions](#) [View Change Log](#)

Name:	Frank Will <a href="#">vCard</a>	Office Phone:	781-333-0300
Account Name:	<a href="#">A A Will Materials Corp</a>	Mobile:	
Lead Source:		Home:	
Campaign:		Other Phone:	
Title:	Owner	Fax:	781-297-9909
Department:		Birthdate:	
Reports To:		Assistant:	
Sync to Outlook®:	<input type="checkbox"/>	Assistant Phone:	
Do Not Call:	<input type="checkbox"/>		
Team:	(admin)	Date Modified:	11/21/2008 11:31am by admin
Assigned to:	admin	Date Created:	11/21/2008 11:31am by admin
Primary Address:	168 Washington St Stoughton Massachusetts 02072-1748	Other Address:	
Description:			
Email:	--None--		

[All](#) [Sales](#) [Marketing](#) [Support](#) [Activities](#) [Other](#)

[Example]

# Opportunities –

- 1) capture sales stage among other details such as type of business and lead source
- 2) system computes probability and determines annual weighted oppty. potential based on sales stage

Home Dashboard **Opportunities** Accounts Contacts Activities Calendar Emails Documents Reports Campaigns Quotes >>

Last Viewed: 4th Oppty Frank Will A A Will Materi A & A Services Eisel Insurance 21st Century Ro 1 Star Realty Pooja Dr. Wife

**Opportunities: 4th Oppty** [? Help](#)

Save Cancel View Change Log

Save and Continue (1 of 7)

Opportunity Name: \* 4th Oppty

Account Name: \* D K Insurance Inc Select Clear Amount: 4500000

Type: New Business Expected Close Date: \* 01/15/2009

Lead Source: Direct Mail Next Step:

Campaign: Select Clear

Sales Stage: \* Present

Team: \* Present

Assigned to: Present

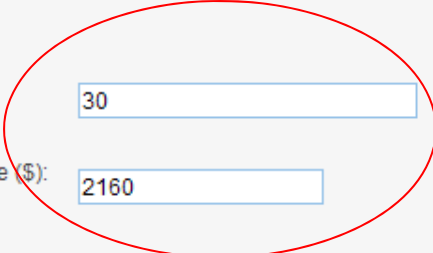
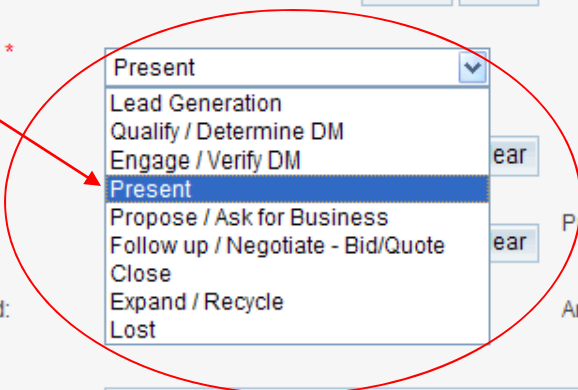
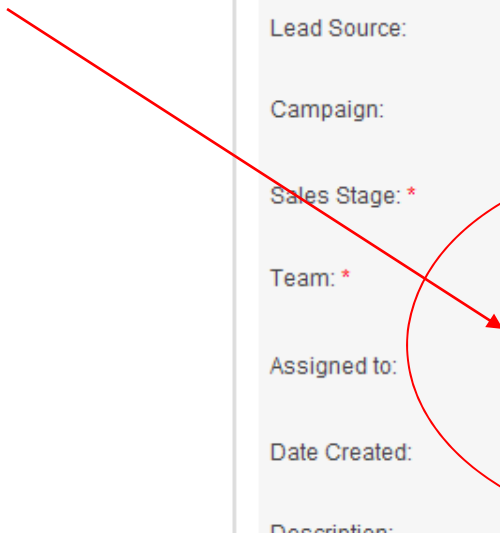
Date Created: Present

Description: The value to Wtd Oppty

Probability (%): 30

Annual Weighted Opportunity Value (\$): 2160

[Example]



# Home –

- 1) view call backs and appointments on home page
- 2) refer to sales steps as outlined by United Dealer Training right within the system

[Example]

Welcome, Maria [Logout] | My Account | Employees | Training | About

Discount Office Products  
www.lowest price supplies.com

Sitemap | Search

Home | Dashboard | Opportunities | Accounts | Contacts | Referrals | Activities | Calendar | Emails | Documents | Reports | Campaigns | >>

Last Viewed: Blue Hills Medi | CB Pooja | Helio Precision Co | A & A Automobil | A & A Industria | 24HOURLOCKSMITHS.COM | Helio Precision Co | Brookline Housi

Shortcuts

- Create Contact
- Enter Business Card
- Create Account
- Create Lead
- Create Opportunity
- Create Quote
- Schedule Meeting
- Schedule Call
- Create Task
- Compose Email

New Contact

First Name:

Last Name: \*

Office Phone:

Email:

Assigned to: \*

My Sugar ▾ Sales Page Marketing & Support Page + Add Page

? Help

### My Calls

Close	Subject	Duration	Start Date	Accept?
<input checked="" type="checkbox"/>	<a href="#">Follow up</a>	0h15m	12/15/2008 12:00pm	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input checked="" type="checkbox"/>	<a href="#">CB Megan</a>	0h15m	12/15/2008 05:00pm	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input checked="" type="checkbox"/>	<a href="#">CB Bruce</a>	0h15m	12/16/2008 03:00pm	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input checked="" type="checkbox"/>	<a href="#">CB Cathy</a>	0h15m	12/16/2008 05:00pm	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input checked="" type="checkbox"/>	<a href="#">CB Christine</a>	0h15m	12/22/2008 05:00pm	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

### My Accounts

Account Name	Phone	City
<a href="#">21st Century Roofing Systems</a>	508-543-0706	Foxboro
<a href="#">AA Will Corp</a>	781-341-4800	Stoughton

### LPS-CRM System

Double click below to Edit.

KEY: Note Steps for Success while making calls:

- 1) Determine Decision Maker;
- 2) Verify Decision Maker and Ask for the Business;
- 3) Follow up, listen and address resistance, handle objections;

Sales Process (sound confident, professional and important):

- State name and company name
- Verify decision maker (pause for confirmation, or ask for name if wrong person)
- Warmer, transition (I'm calling because.....)
- Want (Would like to work with your company.....)
- Ask (Ask for the business confidently.....)

### My Open Cases

(0 - 0 of 0)

Number	Subject	Priority	Status
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### My Top Open Opportunities

(0 - 0 of 0)

Opportunity Name	Amount	Expected Close Date
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# Below Account Detail View –

- 1) list of activities, history, contacts and opportunities
- 2) contacts tied to accounts with details that can be viewed by simply drilling down on name

[Example]

## ACCOUNT HISTORY PENETRATION

Last Order Placed - Date:	Average Order Size:
Last Order - Value:	Last 12 mos. Per Empl. Purchase:
Customer Since:	Penetration (%):
Lifetime Revenues:	Last 3 month Penetration:
Cumulative # of Transactions:	Increase / Decrease By (%):

All Sales Marketing Support Activities

### Activities

Create Task	Schedule Meeting	Schedule Call	Compose Email	(0 - 0 of 0)	
Close	Subject	Status	Contact	Due Date	Assigned User

### History

Create Note or Attachment	Archive Email	View Summary	(0 - 0 of 0)	
Subject	Status	Contact	Date Modified	Assigned User

### Contacts

Create	Select	(1 - 2 of 2)		
Name	City	State	Email	Office Phone
<a href="#">A A Will</a>	Stoughton	Massachusetts		781-341-4800 <a href="#">edit</a> <a href="#">rem</a>
<a href="#">Jackie Hughes</a>	Stoughton	Massachusetts		781-341-4800 <a href="#">edit</a> <a href="#">rem</a>

### Opportunities

Create	Select	(0 - 0 of 0)		
Name	Sales Stage	Close	Amount	Assigned User

# Reports –

- 1) series of reports that can be clicked on to view, print or export
- 2) ability to create custom reports

[Example]

## Report Search

Select  Delete  Selected: 0 (1 - 1)

<input type="checkbox"/> Report Name	Module	Report Type	Date Created	Team	User
<input type="checkbox"/> <a href="#">Current Quarter Forecast</a>	Opportunities	Rows and Columns	07/18/2008 02:32am	Global	admin
<input type="checkbox"/> <a href="#">Detailed Forecast</a>	Opportunities	Rows and Columns	07/18/2008 02:32am	Global	admin
<input type="checkbox"/> <a href="#">List of Charitable Institutions</a>	Accounts	Rows and Columns	07/18/2008 02:32am	Global	admin
<input type="checkbox"/> <a href="#">Prospect List</a>	Accounts	Rows and Columns	07/18/2008 02:32am	Global	admin
<input type="checkbox"/> <a href="#">Call list by last date contacted</a>	Contacts	Rows and Columns	07/18/2008 02:32am	Global	admin
<input type="checkbox"/> <a href="#">Opportunities By Lead Source</a>	Opportunities	Summation with details	07/18/2008 02:32am	Global	admin
<input type="checkbox"/> <a href="#">Pipeline By Type By Team</a>	Opportunities	Summation	07/18/2008 02:32am	Global	admin
<input type="checkbox"/> <a href="#">Pipeline By Team By User</a>	Opportunities	Summation	07/18/2008 02:32am	Global	admin
<input type="checkbox"/> <a href="#">Opportunities Won By Lead Source</a>	Opportunities	Summation	07/18/2008 02:32am	Global	admin
<input type="checkbox"/> <a href="#">Tasks By Team By User</a>	Tasks	Summation	07/18/2008 02:32am	Global	admin
<input type="checkbox"/> <a href="#">Calls By Team By User</a>	Meetings	Summation	07/18/2008 02:32am	Global	admin
<input type="checkbox"/> <a href="#">Meetings By Team By User</a>	Calls	Summation	07/18/2008 02:32am	Global	admin
<input type="checkbox"/> <a href="#">Accounts By Type By Application</a>	Accounts	Summation	07/18/2008 02:32am	Global	admin
<input type="checkbox"/> <a href="#">Leads By Lead Source</a>	Leads	Summation	07/18/2008 02:32am	Global	admin

# Prospect Report –

- 1) list of prospects with details
- 2) ability to customize fields to be viewed within the report

[Example]

Account Name	City	Employees	Revenues (\$M)	Phone Office	Mo. Potential (\$)	Application
<a href="#">100 Chestnut Wakefield</a>	Wakefield	40	2.7	781-246-4643	2107	Office Products - Furniture
<a href="#">1084 Main Melrose</a>	Melrose	40	2.7	781-665-6622		Office Supplies
<a href="#">1LOCK.COM</a>	Woburn	15	1.9	781-933-9999		Office Supplies
<a href="#">24HOURLOCKSMITHS.COM</a>	Malden	17	2.2	781-391-1500		Office Supplies
<a href="#">3i Corporation</a>	Waltham	15		781-890-8300		Office Supplies
<a href="#">495 Realty Group</a>	Hudson	29	3.9	978-562-5500		Office Supplies
<a href="#">A &amp; A Automobile School</a>	Framingham	22		508-875-1357		Office Supplies
<a href="#">A &amp; A Industrial Supply</a>	Wilmington	20	16.3	978-658-9656		Office Supplies
<a href="#">A &amp; A Standard Radio &amp; Television Services</a>	Everett	15	1.4	617-387-2400		Office Supplies
<a href="#">A &amp; B Registr Os Health Services</a>	Tyngsboro	50	6.1	978-649-7520	2633	Office Supplies
<a href="#">A &amp; G Sales Inc</a>	Wilmington	20	12.8	978-988-1333	1053	Office Supplies
<a href="#">AA Knickerbocker Inc</a>	Lowell	20		978-452-2932		Office Supplies
<a href="#">A G Edwards &amp; Sons Inc</a>	Chelmsford	34	13.7	978-250-0003		Office Supplies
<a href="#">A G Lichtenstein &amp; Associate Inc</a>	Natick	20	4.1	508-647-0500		Office Supplies

# Call Summation Reports –

- 1) here you can see total counts of calls made by salesperson
- 2) filters can be applied to review specific time periods – monthly, weekly, daily, yesterday, etc.

[Example]

Module: Accounts

Related: Contacts     
Optional ?

Related: Email Address     
Optional ?

Related: Notes     
Optional ?

Related: Modified by User     
Optional ?

Report Name: Monthly Call Activity Report

Show Query:

Assigned to: admin

Team: Waltham

Rows and Columns Report  
 Summation Report

Modified by User: Full Name	Count
⏪ Alec Biedrzycki	5
⏪ Catherine Lee	173
⏪ Jessica Canary	123
⏪ Maria Pisapia	292
<b>Grand Total</b>	<b>Count</b>
593	

# Call Detail Reports –

- 1) view where calls were made (time and date) – and by who
- 2) at a glance see if any emails were captured and view any notes – drill down for details

[Example]

01/29/2009 12:44pm	<a href="#">Geo Labs Inc</a>	Braintree	0	<a href="#">Bill Donovan</a>		Not Known	<a href="#">maria.pisapia</a>
01/29/2009 12:44pm	<a href="#">Geo Labs Inc</a>	Braintree	0	<a href="#">Dave Kahler</a>	<a href="mailto:dkahler@geolabs.com">dkahler@geolabs.com</a>	Not Known	<a href="#">maria.pisapia</a>
01/29/2009 12:35pm	<a href="#">Geosite Environmental Inc</a>	Canton	0	<a href="#">Lee Figgins</a>		Not Known	<a href="#">maria.pisapia</a>
01/29/2009 12:33pm	<a href="#">Geotechnical Group Inc</a>	Needham Heights	0	<a href="#">John Sullivan</a>	<a href="mailto:jsullivan@tggonline.com">jsullivan@tggonline.com</a>	Not Known	<a href="#">maria.pisapia</a>
01/29/2009 12:26pm	<a href="#">Gibson Engineering Co</a>	Norwood	0	<a href="#">Casey Tindler</a>	<a href="mailto:ctindler@gibsonengineering.com">ctindler@gibsonengineering.com</a>	Not Known	<a href="#">maria.pisapia</a>
01/29/2009 12:26pm	<a href="#">Gibson Engineering Co</a>	Norwood	0	<a href="#">Daniel O'Brien</a>		Not Known	<a href="#">maria.pisapia</a>
01/29/2009 12:26pm	<a href="#">Gibson Engineering Co</a>	Norwood	0	<a href="#">Joseph O'Brien</a>		Not Known	<a href="#">maria.pisapia</a>
01/29/2009 12:26pm	<a href="#">Gibson Engineering Co</a>	Norwood	0	<a href="#">Paul Rice</a>		Not Known	<a href="#">maria.pisapia</a>
01/29/2009 12:09pm	<a href="#">Greenlodge School</a>	Dedham	0	<a href="#">Elizabeth Cummings</a>		Not Known	<a href="#">maria.pisapia</a>
						Budget is frozen they also go to the lowest bidder. Call the High School.	
01/29/2009 11:55am	<a href="#">Gryphon Networks</a>	Norwood	0	<a href="#">Keith Fotta</a>		Not Known	<a href="#">maria.pisapia</a>
01/29/2009 11:55am	<a href="#">Gryphon Networks</a>	Norwood	0	<a href="#">Joanne Pinto</a>	<a href="mailto:jpinto@gryphonnetworks.com">jpinto@gryphonnetworks.com</a>	Not Known	<a href="#">maria.pisapia</a>
01/29/2009 11:55am	<a href="#">Gryphon Networks</a>	Norwood	0	<a href="#">Michael Sullivan</a>		Not Known	<a href="#">maria.pisapia</a>
01/29/2009	<a href="#">Gryphon</a>	Norwood	0	<a href="#">Rob Arsenault</a>		Not Known	<a href="#">maria.pisapia</a>

# Call Detail Reports –

- 1) view where calls were made (time and date) – and by who
- 2) at a glance see if any emails were captured and view any notes – drill down for details

[Example]

Run Report Save Save As Print as PDF

Export (1 - 100 of 163)

Date	Account	City	Monthly Potential (\$)	Contact Name	Email	Existing Vendor	Note	User
01/30/2009 11:25am	<a href="#">Aspencross Financial Group Inc</a>	Westborough		<a href="#">Donna Bernier</a>		Not Known		<a href="#">catherine.le</a>
01/30/2009 11:25am	<a href="#">Aspencross Financial Group Inc</a>	Westborough		<a href="#">Eric Jansen</a>		Not Known		<a href="#">catherine.le</a>
01/30/2009 11:25am	<a href="#">Aspencross Financial Group Inc</a>	Westborough		<a href="#">Steve Johnson</a>		Not Known		<a href="#">catherine.le</a>
01/30/2009 08:15am	<a href="#">Athol Administrative Asstnt</a>	Athol				Not Known		<a href="#">catherine.le</a>
01/30/2009 07:47am	<a href="#">Berlin Memorial School</a>	Berlin		<a href="#">Karen Callaghan</a>	kcallaghan@BBRSD.org	Not Known		<a href="#">catherine.le</a>
01/30/2009 07:47am	<a href="#">Berlin Memorial School</a>	Berlin		<a href="#">Richard Borowiec</a>		Not Known		<a href="#">catherine.le</a>
01/30/2009 11:23am	<a href="#">Bernie &amp; Phyl's Furniture</a>	Westboro		<a href="#">Jamie Roco</a>		Not Known		<a href="#">catherine.le</a>
01/30/2009 10:28am	<a href="#">City of Gardner Police Department</a>	Gardner		<a href="#">Neil C. Erickson</a>		Not Known	*Do not order their own office supplies	<a href="#">catherine.le</a>
01/30/2009 11:09am	<a href="#">Clark Consulting</a>	Southborough				Not Known		<a href="#">catherine.le</a>
01/30/2009 08:16am	<a href="#">Communications Test Design Inc</a>	Westborough				Not Known		<a href="#">catherine.le</a>
01/30/2009 10:00am	<a href="#">Control Corporation of America</a>	Westborough		<a href="#">Van Doty</a>		Not Known		<a href="#">catherine.le</a>