MS Access Action! Sales Manager

Features at a Glance!

- Manage Companies Contacts Vendors Sales Opportunities and Related Actions with Ease!
- Quickly View Pending Actions! Reminders Tasks Due and More
- Mark any Action! Task or Reminder Complete with One Quick Click
- Quickly Sort Filter Drill Down and/or Search Data on Any Tab
- Quickly Open a Company or Contact Record From the Opportunities Form
- Opportunities are Linked to Related Companies Contacts Actions! Resources and Notes
- Sales Scripts can be Added and Edited as Desired so All Salespersons are On-Track with Correct Information
- MS Access Action! Sales Manager Includes Over 100 Sales Tips and You Can Add/Edit/Delete Your Own
- Global Resources Provides Quick Access to Your Company Wide Documents PDF Files Images and Spreadsheets
- User Configurable Action! Types Opportunity Sales Status and Other Dropdowns Throughout the System
- Setup Users with 2 User Levels User and Admin
- View and Print Attractive and Informative Reports
- Export Selected Data to Excel in Order to Create Any Report Desired
- MS Action! Sales Manager Works on Access 2007 thru 2016 Desktop Versions (not compatible with Office 365)
- Useable As-Is or Can be Customized by Individuals or Programmers with Knowledge of MS Access Programming
- Available as a Single-Entity Version or a Developers Version
- Free Installation Help and Initial Training via Phone
- Customization Services Offered at a Discounted Labor Rate

Visit our Action! Sales Manager and MS Access CRM Websites and Contact Us using the information below:

www.msaccesssalesmanager.com www.msaccesscrm.com

Developer/Contact: Anthony Bardaro

Phone: 617-308-3056 –M-F 9am to 6pm Email: <u>abinboston@comcast.net</u>

Your Company Name Here Action! Sales Manager V1.2 Actions! Opportunities Companies Contacts Vendors Products and Services Sales Scripts Sales Coach Global Resources Shortcut Menu Enter New Action! Actions! Enter New Opportunity Enter New Company Q Clear New Action! Search Status: Pending -Enter New Contact 4-0 17 Title Date Туре Company Entry No Opportunity Performed By ê Enter New Vendor 17 01/02/2016 Appointment Appt with Jill about property dimensions Any Company USA 1004 Test 4 market Test Monica Burrill Enter New Resource 17 Mark Rico 01/02/2016 Appointment Appt with Sarah to chat about needs ABC Company Open Reports Menu 17 12/31/2015 Reminder Call Mike 12/31 at 1pm Any Company USA 1004 Test 4 market Test Lisa Gale 17 m 12/31/2015 Note Order Coming in 2 days Any Company USA 1001 Test Two Craig Wilson 4 Jan 🕨 🔸 2016 🕨 Su Mo Tu We Th Fr Sa 1 2 3 4 5 **6** 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 Today is Wed 01/06/2016 🛗 🛛 Go to Today's Date P Administration ж Exit Application

Main Menu with Tabbed Interface

Elegant and User Friendly Tabbed Interface Automatically Scales to Your Screen Size Left Side Shortcut Menu for Quickly Entering Routine Data Each Tab Has a List of Data that can be Sorted – Filtered and Searched Each Tab Has a Button to Search, Clear and Add New Records Double-Clicking an Entry Opens the Related Data Entry Form to the Selected Record \times

Your Company Name Here Action! Sales Manager V1.2 Actions! Opportunities Companies Contacts Vendors Products and Services Sales Scripts Sales Coach Global Resources Shortcut Menu Enter New Action! Actions! 📋 Enter New Opportunity Enter New Company Q Search Clear New Action! Status: Pending -Enter New Contact <u>6 0</u> 17 Date Туре Title Company Entry No Opportunity Performed By 🚔 Enter New Vendor 17 01/02/2016 Appointment Appt with Jill about property dimensions Any Company USA 1004 Test 4 market Test Monica Burrill Enter New Resource 17 🔲 01/02/2016 Appointment Mark Rico Appt with Sarah to chat about needs ABC Company Open Reports Menu 12/31/2015 Reminder Call Mike 12/31 at 1pm Any Company USA 1004 Test 4 market Test Lisa Gale 17 m 12/31/2015 Note Order Coming in 2 days Any Company USA 1001 Test Two Craig Wilson 4 Jan 🕨 🔨 2016 🕨 Su Mo Tu We Th Fr Sa 1 2 3 4 5 **6** 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 Today is Wed 01/06/2016 🛗 Go to Today's Date P Administration ж Exit Application

Actions Tab

Quickly Sort – Filter and Search Actions! Quickly Mark any Action! Complete by Checking a Checkbox at Left Side Filter and Drill Down Actions by Status – Staff Member – Company and/or Opportunity Quickly View Pending Actions – Reminders – Tasks Due and More Double-Clicking an Entry Opens the Related Data Entry Form to the Selected Record Actions! Can be Entered Linked to a Company or Linked to an Opportunity Action! Types are User Configurable

🔳 Main Menu				×
Your Company Name Her	2			Action! Sales Manager V1.2
Shortcut Menu	Actions! Opportunities Companies Contacts Vendors Products and Services Sales Scrip	ts Sales Coach Global Resources		
Enter New Action!				
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🚔 Enter New Vendor	Entry No Entry Date Opportunity Company	Sales Lead	Product Sales Status	Prob. Rank Order Date
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Administration				
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Opportunities Tab

Quickly Sort – Filter and Search Opportunities

Filter and Drill Down Opportunities by Sales Status – Sales Lead and/or Company and/or Opportunity

Double-Clicking an Entry Opens the Related Data Entry Form to the Selected Record

Action! Types are User Configurable

Your Company Name Here

Shortcut Menu	Actio	ons! Opportunities Companie	es Contacts Ve	ndors Prod	ucts and Ser	vices Sales Scrip	ts Sales Coach	Global Resources					
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		3M Corporation		801 Nort	th Marquette	Road			 Prairie du Chien	WI	53821	USA	
Open Reports Menu		4Front Engineered Solutions	5	1612 Hu	tton Drive, S	Suite 140			Carrollton	тх	76013	USA	
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Su Mo Tu We Th Fr Sa		📕 A & B Sheet Metal		10932 V	ulcan Street				South Gate	AZ	90280	USA	
1 2		A Better Panel Inc.		Blindman	n Industrial P	ark	4104 - 39139 Hi	ghway 2A	Red Deer County	Alberta	T4S 2A8	CANADA	
11 12 13 14 15 16		A O Smith WPC		1100 E.	Fairview Ave	2,			Johnson City	TN	37601	USA	
17 18 19 20 21 22 23 24 25 26 27 28 29 30		A. O. Smith Corporation		401 Free	derick Rd.				El Paso	тх	79905	USA	
31		A. O. Smith Corporation		U.S. Hig	hway #1No	rth			McBee	SC	29101	USA	
Today is Sun 01/10/2016		A. O. Smith Corporation		12100 W	/. Park Place		P.O. Box 24501	2	Milwaukee	WI	53224	USA	
🛗 Go to Today's Date		A. O. Smith Corporation		500 Lind	ahl Parkway				Ashland City	TN	37015-1299	USA	
		🔋 A.J. Manufacturing, Inc.		1217 Oa	k Street				Bloomer	WI	54724	USA	
		A.M. & Associates		1223 Sh	erborn Stree	:t	Suite 101		Corona	CA	92879-5009	USA	
		ABB Automation, Inc.		1250 Bro	own Rd.				Auburn Hills	MI	48326	USA	
		ABC Corporation		1 ABC P	arkway				Beloit	WI	53511	USA	
		ABC Group		10 Disco	Road				Toronto	Ontario	M9W 1L7	CANADA	
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Administration	2	Able Garage Door Manufact	turing	5707 Mit	tchelldale				Houston	тх	77092	USA	
		ABS											-

Companies Tab

Quickly Sort – Filter and Search Companies Quickly Lookup a Company Address or Phone Number Quickly Email a Company by Clicking Mail Icon at Right (requires MS Outlook or Windows Mail) Double-Clicking an Entry Opens the Related Data Entry Form to the Selected Record ×

Action! Sales Manager V1.2

Your Company Name Here

Action! Sales Manager V1.2

Shortcut Menu	Ac	tions! Opportunities Companies C	Contacts Vendors Products and Services S	ales Scripts Sales Coach Global Resources				
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Enter New Contact								
🚔 Enter New Vendor		🔚 Contact Name	Company	Work Function	Phone	Fax	E-Mail	
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		📗 Mark Masterson	Any Company USA	РМ				
Open Reports Menu		📗 Mark Ryan	CCC Company	President	617-111-2222	617-222-3333	MarkRyan@CCCCCompany.com	
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31		📗 Test FN xx	EEE Company	Test WF				
Today is Wed 01/06/2016								
🛗 Go to Today's Date								
🔑 Administration								
X Exit Application								

Contacts Tab

Quickly Sort – Filter and Search Contacts by Name – Work Function or Company

Filter and Drill Down Contacts by Company

Quickly Lookup a Contact Phone Number

Quickly Email a Contact by Clicking Mail Icon at Right (requires MS Outlook or Windows Mail)

Double-Clicking an Entry Opens the Related Data Entry Form to the Selected Record

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🔳 Main Menu Your Company Name Here Action! Sales Manager V1.2 Actions! Opportunities Companies Contacts Vendors Products and Services Sales Scripts Sales Coach Global Resources Shortcut Menu The Inter New Action! Vendors Enter New Opportunity Enter New Company Q [Search Clear New Vendor Enter New Contact 💼 Company Address Address 2 City State Postal Code Country 💼 Enter New Vendor CUSA 100 Main Street Suite 316 Malden MA 02148 USA Enter New Resource 💼 Other Address 1 Here Address 2 Here City MA 02134 USA Dpen Reports Menu 4 Jan ▶ 4 2016 ▶ Su Mo Tu We Th Fr Sa 1 2 4 5 6 7 8 9 3 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 Today is Sun 01/10/2016 🛗 Go to Today's Date P Administration Exit Application

Vendors Tab

Quickly Sort – Filter and Search Vendors

Quickly Lookup a Vendor Address or Phone Number

Quickly Email a Vendor by Clicking Mail Icon at Right (requires MS Outlook or Windows Mail)

Vendors are Linked to Related Opportunity Expenses

Double-Clicking an Entry Opens the Related Data Entry Form to the Selected Record

Your Company Name Here

Shortcut Menu Actions! Opportunities Companies Contacts Vendors Products and Services Sales Scripts Sales Coach Global Resources Enter New Action! Products and Services Enter New Opportunity Enter New Company Q | Clear Search New Item Category: (All) • Enter New Contact Product/Service Category Price Enter New Vendor 🍰 A10 Machine \$0.00 Enter New Resource 췕 A100 Machine \$0.00 Dpen Reports Menu 🍰 A20 Machine \$0.00 췕 A200 Machine \$0.00 ▲ Jan ▶ ▲ 2016 ▶ Su Mo Tu We Th Fr Sa 🍰 A40 Machine \$0.00 1 2 🍰 A70 Machine \$0.00 3 4 5 6 7 8 9 10 11 12 13 14 15 16 ABC Machine Trade \$0.00 17 18 19 20 21 22 23 췕 Chilling Cabinet Refrig Plant \$0.00 24 25 26 27 28 29 30 31 🍰 Conveyor Systems Auto Plant \$0.00 Today is Wed 01/06/2016 🍰 Lab Trial Service \$0.00 🛗 Go to Today's Date ĝ. Piping Piping \$0.00 🍰 Service Service \$0.00 XYZ Machine Trade \$0.00 Administration Exit Application ×

Products and Services Tab

Quickly Sort – Filter and Search Products and Services Drill Down and Products by Category Double-Clicking an Entry Opens the Related Data Entry Form to the Selected Record

Products and Services Categories are User Configurable

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Action! Sales Manager V1.2

Your Company Name He	re	Action! Sales Manager V1.2
Shortcut Menu	Actions! Opportunities Companies Contacts Vendors Products and Services Sales Scripts Sales Coach Global Resources	
Enter New Action!		
Enter New Opportunity	🚳 Sales Scripts	
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Enter New Vendor	A 10 Benefite Benefite Benefite Here	
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🖨 Open Reports Menu	General Introduction General Introduction Be sure to let the prospect know the following information during an introduction call.	
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1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31		
Today is Wed 01/06/2016		
Go to Today's Date		
Administration		
X Exit Application		

Sales Scripts Tab

Quickly Sort – Filter and Search Sales Scripts Enter and Edit Sales Scripts as Desired Quickly View Sales Scripts by Category Double-Clicking an Entry Opens the Related Data Entry Form to the Selected Record Sales Script Categories are User Configurable Sales Scripts Ensures that Your Sales Staff is Providing Correct and Consistent Information ×

Your Company Name Here

Shortcut Menu	Actions! Opportunities Comp	panies Contacts Vendors Products and Service	es Sales Scripts Sales Coach Global Resources
Enter New Action!			
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Enter New Contact	× 0.1		
🚔 Enter New Vendor		Description	Summary (open record for more)
Enter New Resource	Closing	Trial Close	Closing is the most important thing you can do. If you don't ask for the business, you'l lose more sales than you make. That's the obvious part.
Open Reports Manu	Introduction	How to Introduce Yourself	
jej open keports Menu	X Objections	Answer Objections Appropriately	At some point and time, most customers will have questions that can lead them to either wait to purchase, or purchase from someone else. Or they can talk themselv
▲ Jan ▶ ▲ 2016 ▶	🌂 Objections	How to Handle No	Details here
<mark>Su</mark> Mo Tu We Th Fr Sa	🔨 Rainmaker Principals	Assess yourself	Assess yourself, get feedback, and improve continuously. Rainmakers are never afraid to learn the cold, hard truth about themselves. They take what they discover
	🍾 Rainmaker Principals	Be a fluent expert	Be a fluent expert. Rainmakers are masters of market knowledge, customer needs, their products and services, their value, their competition, and everything else th
10 11 12 13 14 15 16	🔨 Rainmaker Principals	Be brave	Be brave. It takes courage to rise to the occasion in sales. Rainmakers not only conquer their fears, they seek actively to win the most fruitful sales opportunities no
17 18 19 20 21 22 23 24 25 26 27 28 29 30	🍾 Rainmaker Principals	Create new conversations	Create new conversations every day. Rainmakers always feed the front of their pipelines and improve their pipeline quality. They never coast, and nary a day goes
31	🔨 Rainmaker Principals	Lead masterful conversations	Lead masterful rainmaking conversations. Rainmakers lead masterful sales conversations, from prospecting to needs discovery to closing to account management.
Today is Wed 01/06/2016	🔨 Rainmaker Principals	Live by goals	Live by goals. Rainmakers are goal-setting and goal-following fanatics. Goals are a part of their daily rituals.
🛗 Go to Today's Date	🍾 Rainmaker Principals	Play to win-win	Play to win-win. Rainmakers respect, and always try to satisfy, the best interests of prospects and clients (the "win-win" part). They are also extremely dedicated to
	🔨 Rainmaker Principals	Set the agenda	Set the agenda; be a change agent. Rainmakers recommend, advise, and assist. They are change agents who are not afraid to push when it's in the best interest of
	🔨 Rainmaker Principals	Take action	Take action. Rainmakers realize that goals without actions don't get you very far. While other people intend to take action and do more, rainmakers do it.
	🔨 Rainmaker Principals	Think buying first, selling second	Think buying first, selling second. Rainmakers map their selling processes to the processes and psychology of buying.
	🌂 Sales Tips	Always Listen to Your Customer	When it comes to selling most people are guilty overselling, and Miss
	🌂 Sales Tips	Always qualify your prospect	When your budget is tight and your time is important it's important
	🌂 Sales Tips	Answer Clearly	Answer questions directly and clearly: If you are asked a question and you give a "politician's answer" - in other words, if you don't answer the question - your credi
	🌂 Sales Tips	Answer EMail and Phone Messages Quickly	Answer all your e-mail messages as quickly as
	🌂 Sales Tips	Ask Six Universal Questions	There are six universal questions you can ask almost anytime and anywhere in a sales presentation.
	🌂 Sales Tips	Ask the Right Questions	When it comes to weeding out serious leads from the ones who will
Administration	🍾 Sales Tips	Be Clear and Direct	Be clear and direct: When pitching do not use complicated diction. Pride yourself instead on being able to explain the concept as quickly, clearly and simply as possible
X Exit Application	🌂 Sales Tips	Be Helpful	In all areas of your work life and I mean ALL areas aspire to be as helpful as you can. Help your customers, first and foremost. Help co-workers, other departments,

Sales Coach Tab

Quickly Sort - Filter and Search Sales Coach Entries (Over 100 Included!)

Enter and Edit Sales Coach Entries and Sales Tips as Desired

Quickly View Sales Coach Entries by Category

Double-Clicking an Entry Opens the Related Data Entry Form to the Selected Record

Sales Coach Categories are User Configurable

Sales Coach Entries Provide Tips and Guidance to Your Sales Staff

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Action! Sales Manager V1.2

📰 Main Menu			
Your Company Name He	re	Action! Sa	ales Manager V1.
Shortcut Menu	Actions! Opportunities Companies Contacts Vendors Products and Services Sales Scripts Sales Coach Global Resources		
Enter New Action!			
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🔷 Enter New Vendor	Resource Type Description	File Location	
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Administration			
X Exit Application			

Global Resources Tab

Quickly Sort – Filter and Search Global Resources Quickly Open any Resource or Linked File by Clicking an Icon at Right Filter Actions by Type Double-Clicking an Entry Opens the Related Data Entry Form to the Selected Record Resource Types are User Configurable Resources Can be Linked Files – MS Word Documents – PDF Files – Excel Files – Images – Websites and Others

Your Company Name He	re		Action! Sales Manager V1.2
Shortcut Menu	Actions! Opportunities Companies Contacts V		
Enter New Action!		Print Delete Add Save Close	
Enter New Opportunity	T Actions!	Action! Details	
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1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 Today is Wed 01/06/2016 Image: Solution of the second se		Performed By: Monica Burrill Attached File: Image: Completed Date: Completed: Completed Date: Record: Monica Filter	
Administration			
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Actions! Entry Form

Quickly Enter Actions Using Various Dropdowns and Textboxes

Quickly Open a Company Record or Opportunity Record by Clicking an Icon Beside Entry

Add a Reference to a Linked File – Document – Image or Other File

Quickly Open Linked Files by Clicking an Icon

Actions are Automatically Linked to Selected Company and/or Opportunity

Action! Types are User Configurable

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Var Company Name Here: Opportunity Details PretDetails Addition 1 Sales Manager V1.2	🔳 Main Menu	(×
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Administration	Administration			
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Opportunity Entry Form

Quickly Enter Opportunities Using Various Dropdowns and Textboxes Quickly Open a Company Record by Clicking an Icon Beside Entry Add Linked Actions! – Contacts – Resources – Expenses and Notes Set Probability from 0 to 100% Opportunities are Automatically Ranked by Probability Manage Opportunities by lead Source – Market Type and Other Data Sales Status Types are User Configurable

Opportunities – Related Actions

Quickly View – Add and Edit Linked Actions! to an Opportunity

Mark Any Action! Complete by Checking a Checkbox at Left Side

Double-Clicking an Entry Opens the Related Data Entry Form to the Selected Record

Linked Actions! Appear on the Opportunity Entry Form – On the Actions! Tab of the Main Menu and on the Companies Entry Form

🔳 Main Menu	(×
Your Company Name Her	re	Opportunity Details	Action! Sales Manager V1.2
Shortcut Menu	Actions! Opportunities	Opportunity Details Print Details Delete Add Save Close	
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📜 Enter New Company	Q	Entry Date: 12/31/2015 Sales Status: Initial Contact	Sales Status: (All)
Enter New Contact		Company: Any Company USA 💽 💟 Sales Lead: Monica Burrill	
🚔 Enter New Yendor	Entry No En	Opportunity: Test 4 market Test Revenue: \$250,000.00 Forecast: \$125,000.00	Sales Status Prob. Rank Order Date
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	1004 12,	Lead Source: Trade Show 2015 Close Date:	Initial Contact 50 % M
Open Reports Menu	1003 12,		Initial Contact 5 % N 05/13/2016
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10 11 12 13 14 15 16		🛄 Contact Name Work Function Phone Fax EMail	
17 18 19 20 21 22 23 24 25 26 27 28 29 30		Mark Masterson PM 617-111-2222 mmasterson@anvcompany.	
31			
Today is Wed 01/06/2016			
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		Record: N S OF 6 P Pr 22 K Onlinered Search	
A			
Administration			
X Exit Application			

Opportunities – Related Contacts

Quickly View – Add and Edit Linked Contacts to an Opportunity

Quickly Email a Contact by Clicking Mail Icon at Right (requires MS Outlook or Windows Mail)

Double-Clicking an Entry Opens the Related Data Entry Form to the Selected Record

🔳 Main Menu	(×
Your Company Name He	re	Opportunity Details	Action! Sales Manager V1	.2
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📜 Enter New Company		Entry Date: 12/31/2015 Sales State	us: Initial Contact Sales Status: (All)	
Enter New Contact		Company: Any Company USA 💽 📃 Sales Lead	: Monica Burrill	-
💼 Enter New Vendor	Entry No En	Opportunity: Test 4 market Test Revenue:	\$250,000.00 Forecast: \$125,000.00	
Enter New Resource	1005 12	Product: A200 Probability	: 50 w Rank: M Quotation 50 % M	
Dpen Reports Menu	1004 12	Lead Source: Trade Show 2015 Close Date	Initial Contact 50 % M	
	1003 12 1002 12		Initial Contact 5 % N 05/15/2016	
▲ Jan ▶ ▲ 2016 ▶ Su Mo Tu We Th Fr Sa	1002 12	Notes and Details Actions! Contacts Resources Expenses Market/Miscellaneous	Quattion 50 % M 02/28/2016	
	1000 12	Resources	Add Resource Initial Contact 25 % L 12/02/2016	
3 4 5 6 7 8 9 10 11 12 13 14 15 16		Resource Tune Description	File Location	
17 18 19 20 21 22 23 24 25 26 27 28 20 20		Insource Type Description		
31				
Today is Wed 01/06/2016				
🛗 Go to Today's Date				
		Record: H 4 5 of 6 + H + T Unfiltered Search		
	l l			
🔑 Administration				
X Exit Application				

Opportunities – Related Resources

Quickly Add Linked Resources to an Opportunity

Quickly Open any Resource or Linked File by Clicking an Icon at Right

Double-Clicking an Entry Opens the Related Data Entry Form to the Selected Record

Resources Can be Linked Files – MS Word Documents – PDF Files – Excel Files – Images – Websites and Others

🔳 Main Menu	(×
Your Company Name Her	re	Opportunity Details	Action! Sales Manager V1.2
Shortcut Menu	Actions! Opportunities	Opportunity Details Print Details Delete Add Save Close	
Enter New Action!		Opportunity Details	
Enter New Opportunity	Dipportunitie	Entry No: 1004	
Enter New Company	Q	Entry Date: 12/31/2015 Sales Status: Initial Contact	Sales Status: (All)
Enter New Contact	🔿 Columbia – Co	Company: Any Company USA 🗨 💓 Sales Lead: Monica Burrill 💌	Color Status - Dash - Dash Order Data
🚔 Enter New Vendor		Opportunity: Test 4 market Test Revenue: \$250,000.00 Forecast: \$125,000.00	Sales Status Prob. Hank Urder Date
Enter New Resource	1005 12	Product: A200 Probability: 50 V Rank: M	Quotation 50 % M
Open Reports Menu	1004 12	Lead Source: Trade Show 2015 Close Date:	Initial Contact 50 % M
			Initial Contact 5 % N 05/13/2016
▲ Jan ▶ ▲ 2016 ▶		Notes and Details Actions! Contacts Resources Expenses Market/Miscellaneous	In Progress 40 % M 12/14/2015
Su Mo Iu We Ih Fr Sa		Evpanses	Quotation 50 % M 02/28/2016
3 4 5 6 7 8 9	1000 12	Add Expense	Initial Contact 25 % L 12/02/2016
10 11 12 13 14 15 16 17 18 19 20 21 22 23		Date Expensee Description Vendor Amount	
24 25 26 27 28 29 30 31		12/31/2015 Craig Wilson Air Travel CUSA \$1,200.00	
Teday is Wed 01/06/2016			
Go to Today's Date			
		I otal Expenses \$1,200.00	
		Record: I4 4 5 of 6 F H H K Unfiltered Search	
Administration			
X Exit Application			

Opportunities – Related Expenses

Quickly add Linked Expenses to an Opportunity

Double-Clicking an Entry Opens the Related Data Entry Form to the Selected Record Linked Expenses Appear on the Opportunity Entry Form and Vendor Entry Form

🔳 Main Menu			×
Your Company Name He	re	Opportunity Details	Action! Sales Manager V1.2
Shortcut Menu	Actions! Opportunities	Opportunity Details Print Details Delete Add Save Close	
Enter New Action!		Opportunity Details	
Enter New Opportunity	Dpportunitie		
Enter New Company		Entry Date: 12/31/2015 Sales Status: Initial Contact	Sales Status: (All)
🗐 Enter New Contact		Company: Any Company USA 💌 🐑 Sales Lead: Monica Burrill	
Enter New Vendor	Entry No En	Opportunity: Test 4 market Test Revenue: \$250,000.00 Forecast: \$125,000.00	Sales Status Prob. Rank Order Date
Enter New Resource	1005 12	Product: A200 Probability: 50 V Rank: M	Quotation 50 % M
Dpen Reports Menu	1004 12	Lead Source: Trade Show 2015 Close Date:	Initial Contact 50 % M
	1003 12		In Progress 40 % M 12/14/2015
Su Mo Tu We Th Fr Sa	1001 12	Notes and Details Actions! Contacts Resources Expenses Market/Miscellaneous	Ouotation 50 % M 02/28/2016
1 2	1000 12		Initial Contact 25 % L 12/02/2016
3 4 5 6 7 8 9 10 11 12 13 14 15 16		Market: Automotive	······
17 18 19 20 21 22 23		Description: Automotive	
24 25 26 27 28 29 30 31		Market Notes:	
Today is Wed 01/06/2016			
🛗 Go to Today's Date			
		Record: H 4 5 of 6 + H + K T Unfiltered Search	
			- }
Administration			
X Exit Application			

Opportunities – Marketing Data and Notes

Manage Market Types and Related Description and Note Market Types are User Configurable

Your Company Name Here

Shortcut Menu	Actions! Opportunities Compa	Company Parand)
Enter New Action!		Company Record		
📋 Enter New Opportunity	関 Companies	関 CCC Company	Delete Add Save Close	
Enter New Company		Company Data Contacts Actions! Opportunities Resources Expense	es Notes	
Enter New Contact		Contact Data - Sales Lead	Company Address	Fax F-Mail
Enter New Vendor	ABC Company	Company Name: CCC Company	Address 1: 139 Any Street	
Enter New Resource	Any Company USA	Contact FN: Mark	Address 2: Suite 1234 City: Boston	
Open Reports Menu	CCC Company	Contact LN: Ryan Work Function: President	State: MA	2 617-222-3333 MarkRyan@CCCCCompany.com 🖂
▲ Jan ▶ ▲ 2016 ▶	EEE Company	Sales Lead: Andrew Barton	Zip: 02134	
Su Mo Tu We Th Fr Sa	PPPP			·
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16	TTT Company	Phone - EMail - Web	Marketing Data	
17 18 19 20 21 22 23	777 Company	Phone: 617-111-2222	Market: Automotive	
24 25 26 27 28 29 30 31		Fax: 617-222-3333	Products:	
		EMail: MarkRyan@CCCCCompany.com		
		Website:	Mailings:	
Go to Today's Date				
		Record: H 4 1 of 8 Files No Filter Search		
				-
Administration				
X Exit Application				

Company Entry Form

Quickly Enter Company Data

Primary Contact is Automatically Merged with Contacts on the Contacts Tab

Manage Unlimited Contacts Per Company

Tabs Show Linked Contacts – Actions! – Opportunities – Resources and Expenses

Quickly Email a Contact by Clicking Mail Icon (requires MS Outlook or Windows Mail)

Quickly Visit a Company Website by Clicking Web Icon

Double-Clicking a Linked Entry Opens the Related Data Entry Form to the Selected Record

Contact Entry Form

Quickly Enter Contact Data

Contacts Can be Linked to a Company or Entered as a Stand-Alone Contact

Tabs Show Linked Opportunities

Quickly Email a Contact by Clicking Mail Icon (requires MS Outlook or Windows Mail)

Quickly Visit a Contact Website by Clicking Web Icon

🔳 Main Menu			×
Your Company Name He	re		Action! Sales Manager V1.2
Shortcut Menu	Actions! Opportunities Compa		
Enter New Action!		Vendor Record	
Enter New Opportunity	e Vendors	CUSA Delete Add Save Close	_
Enter New Company		Vendor Data Expenses	
Enter New Contact	Company	Vendor Data - Primary Contact	Env C Mail
Enter New Vendor		Company: CUSA Address 1:	
Enter New Resource	CUSA Other	Contact FN: Address 2:	
Open Reports Menu		Contact LN:	
▲ Jan ▶ ▲ 2016 ▶		Vendor Type: Contact Zip:	
Su Mo Tu We Th Fr Sa		Country: HL	
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 12 22 32 24 25 26 27 28 29 30 31 Today is Wed 01/06/2016 10 Today is Wed 01/06/2016 10 Today is Wed 01/06/2016		Phone - EMail - Web Phone: Fax: EMail: Website: Website: Record: H < 1 of 2 > PI His K No Filter Search	
Administration			
X Exit Application			

Vendor Entry Form

Quickly Enter Vendor Data

Primary Contact is Automatically Merged with Contacts on the Contacts Tab

Tabs Show Linked Expenses

Quickly Email a Contact by Clicking Mail Icon (requires MS Outlook or Windows Mail)

Quickly Visit a Vendor Website by Clicking Web Icon

Double-Clicking a Linked Entry Opens the Related Data Entry Form to the Selected Record

M	ain	м	enu	Ľ
			~	

Your Company Name Here

Action! Sales Manager V1.2

Shortcut Menu	Actions! Opportunities Companies Contacts Vendors	Products and Services Sales Scripts Sales Coach Global Resources				
Enter New Action!		Product/Service Details				
Enter New Opportunity	Products and Services	Product/Service Details Delete Add Save Close				
📜 Enter New Company	S		Category: (All)			
Enter New Contact		Product/Service Details	3, Vuiy			
Enter New Vendor	Product/Service		Price			
 	🏇 A10	Product/Service: A10	\$0.00			
Enter New Kesource	🍰 A100	Category: Machine	\$0.00			
Open Reports Menu	🍰 A20	Price: \$0.00	\$0.00			
▲ Jan → ▲ 2016 →	🍰 A200	Description:	\$0.00			
Su Mo Tu We Th Fr Sa	🍰 A40		\$0.00			
1 2	🍰 A70		\$0.00			
3 4 5 6 7 8 9 10 11 12 13 14 15 16	🍰 ABC Machine		\$0.00			
17 18 19 20 21 22 23 24 25 26 27 28 29 30	🍰 Chilling Cabinet		\$0.00			
31	p Conveyor Systems	•	\$0.00			
Today is Wed 01/06/2016	🍻 Lab Trial		\$0.00			
🛗 Go to Today's Date	🍰 Piping	Percent: M. 4 2 of 13 b bl bl. T. No Filter Search	\$0.00			
	🏇 Service		\$0.00			
	🏇 XYZ Machine	Trade	\$0.00			
🔑 Administration						
X Exit Application						

Products and Services Entry Form

Quickly Enter Products and Services

Product and Service Categories are user Configurable Adaptable for Any Business Product and/or Service

			^
Your Company Name He	ere		Action! Sales Manager V1.2
Shortcut Menu	Actions! Opportunities Companies Conta	Sales Script Details	
Enter New Action!		Sales Script Details Delete Add Save Close	
Enter New Opportunity	🍓 Sales Scripts		
📃 Enter New Company		Sales Script Details	Category: /AID
Enter New Contact		Category: Introduction	
Enter New Vendor	Category Descript	Description: General Introduction	
Enter New Resource	A10 Benefits	Sales Script: Be sure to let the prospect know the following information during an introduction call.	
Dpen Reports Menu	ABC Machine Specificat	1. We are a 50 year old company	
	- General I	2. We are the number one provider of xxx products and services	
▲ Jan ▶ ▲ 2016 ▶ Su Mo Tu We Th Fr Sa		3. Our products are used by major manufacturs all over the world.	
3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31		4. Bullet point here.	
Today is Wed 01/06/2016			
🛗 Go to Today's Date	-	Reference: C:\Users\AB\Documents\intro.doc	
		Record: H 4 3 of 3 + H H K K No Filter Search	
Administration			
🐹 Exit Application			

Sales Script Entry Form

Sales Scripts can be Added and Edited as Desired

Sales Script Categories are User Configurable

Using Sales Scripts Keeps All Salespersons On-Track with Consistent and Correct Information

Reference Can be Linked Files – MS Word Documents – PDF Files – Excel Files – Images – Websites and Others

Open Referenced Files and Websites by Clicking View Icon

>

Your Company Name Here

Action! Sales Manager V1.2

Shortcut Menu	Actions! Opportunities Compa	anies Conta	Sales Coach Details						
Enter New Action!			🔨 Sales Coach	Details	Delete	Add	Save	Close	
Enter New Opportunity	🔨 Sales Coach								
Enter New Company			Sales Script Details						
Enter New Contact			Category:	Objections					Category: (All)
Enter New Vendor	🔨 Category	Descript	Description:	Answer Objections Appropriately					<u> </u>
Enter New Resource	K Closing	Trial Close	Details:	At some point and time, most custome	rs will have questions that	can lead the	n to	*	ose more sales than you make. That's the obvious part.
		How to In		either wait to purchase, or purchase f out of buying altogether. These quest	rom someone else. Or they ions are actually objection:	can talk ther s. Sometimes	nselves the		
— орен керонь мени	Notice Contractions	Answer O		customer doesn't even know it. Some the question being asked. You need t	times the objection is com o know what is stopping th	pletely differe ne customer f	nt than 'om		wait to purchase, or purchase from someone else. Or they can talk themselv
▲ Jan ▶ ▲ 2016 ▶	Cobjections	How to Ha		buying.					
Su Mo Tu We Th Fr Sa	Rainmaker Principals	Assess yo		customer is not comfortable with you	reen. Just an excuse not l vet, or your product. Re-sta	to buy becau: ate the object	on, ask		to learn the cold, hard truth about themselves. They take what they discover
3 4 5 6 7 8 9	Rainmaker Principals	Bebrave		questrons about it, respond appropriately with a real solution. Lushion, probe, respond,	broducts and services, their value, their competition, and every during else up				
10 11 12 13 14 15 16 17 18 19 20 21 22 23	Rainmaker Principals	Create ne			es and improve their pipeline quality. They never coast, and nary a day goes				
24 25 26 27 28 29 30 31	Kainmaker Principals	Lead mas							s, from prospecting to needs discovery to closing to account management.
Today is Wed 01/06/2016	Kainmaker Principals	Live by go							of their daily rituals.
🛗 Go to Today's Date	🔨 Rainmaker Principals	Play to wi						-	spects and clients (the "win-win" part). They are also extremely dedicated to
	Kainmaker Principals	Set the ac	Reference:				*	Q.	are change agents who are not afraid to push when it's in the best interest of
	🍾 Rainmaker Principals	Take actic							other people intend to take action and do more, rainmakers do it.
	🍾 Rainmaker Principals	Think buy	Record: I4 4 6 of 72	► ► ► ► ► ► ► ► ► ► ► ► ► ► ► ► ► ► ►	h				es and psychology of buying.
	🔨 Sales Tips	Always List	en to Your Customer	when it comes to selling i	most people are guilty ove	erselling, and	MISS		J
	🌂 Sales Tips	Always qua	lify your prospect	When your budget is tigh	t and your time is importa	nt it's importa	int		
	🌂 Sales Tips	Answer Cle	arly	Answer questions directly	y and clearly: If you are a	sked a questi	on and yo	u give a "poli	tician's answer" – in other words, if you don't answer the question – your credi
	🌂 Sales Tips	Answer EM	ail and Phone Messages Q	Duickly Answer all your e-mail me	essages as quickly as				
	🌂 Sales Tips	Ask Six Uni	versal Questions	There are six universal q	uestions you can ask almo	st anytime ar	nd anywhe	re in a sales	presentation.
	🔨 Sales Tips	Ask the Rig	ht Questions	When it comes to weedin	g out serious <mark>l</mark> eads from t	he ones who	will		
Administration	🔨 Sales Tips	Be Clear ar	d Direct	Be clear and direct: Whe	n pitching do not use comp	olicated dictio	n. Pride yo	ourself instea	d on being able to explain the concept as quickly, dearly and simply as possible
X Exit Application	K Sales Tips	Be Helpful		In all areas of your work	life and I mean ALL areas	aspire to be	as helpful	as you can. I	elp your customers, first and foremost. Help co-workers, other departments, 💌

Sales Coach Entry Form

Sales Coach Entries can be Added and Edited as Desired

Sales Coach Categories are User Configurable

Sales Coach Entries Can Help Your Sales Team with Tips and Tricks to Increase Their Sales

Reference Can be Linked Files – MS Word Documents – PDF Files – Excel Files – Images – Websites and Others

Open Referenced Files and Websites in One Click Using the View Icon

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Your Company Name Here Action! Sales Manager V1.2 Shortcut Menu Actions! Opportunities Companies Contacts Vendors Products and Services Sales Scripts Sales Coach Global Resources Enter New Action! Resource Details Global Resources Enter New Opportunity Resource Details Delete Add Save Close Enter New Company Q Sea Type: (All) • Resource Details Enter New Contact Resource Type Description File Location Enter New Vendor Entry Date: 11/28/2008 Brochure Ø ddd Enter New Resource Resource Type: • Website -Ø Document hghg Dpen Reports Menu Description: Yahoo Search Engine -" Ø PDF Test PDF Notes: * Website Yahoo Search Engine www.yahoo.com Ø ▲ Jan ▶ ▲ 2016 ▶ Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 ÷ 24 25 26 27 28 29 30 31 File Path: www.yahoo.com 😿 🔍 Today is Wed 01/06/2016 🛗 Go to Today's Date Record: I 4 4 2 of 4 🕨 🕨 📡 Unfiltered Search Administration × Exit Application

Global Resources Entry Form

Quickly Enter Global Resources Linked Files Can Be – MS Word Documents – Excel Files - PDF Files – Images – Websites and Others Global Resources Provides Quick Access to Your Company Wide Documents

Open Linked Resources in One Click Using the View Icon

Your Company Name Here Action! Sales Manager V1.2 Actions! Opportunities Companies Contacts V Shortcut Menu ReportsMenu Enter New Action! 🗎 Reports Menu Close Actions! Enter New Opportunity Q Enter New Company Reports Exports Status: Pending • Enter New Contact 17 Date Туре Entry No Opportunity Performed By View Report View Report 💼 Enter New Vendor Actions! - by Criteria Contacts - by Sales Lead 17 📄 01/02/2016 Appointment 1004 Test 4 market Test Monica Burrill Enter New Resource 17 📄 01/02/2016 Appointment Mark Rico View Report View Report Dpen Reports Menu Opportunities - by Criteria Sales Pipeline - by Sales Lead 17 🔲 12/31/2015 Reminder 1004 Test 4 market Test Lisa Gale 📅 📄 12/31/2015 Note ▲ Jan ▶ ▲ 2016 ▶ 1001 Test Two Craig Wilson View Report View Report Su Mo Tu We Th Fr Sa Companies - Listed A to Z Sales Forecast - by Sales Lead 1 2 3 4 5 **6** 7 8 9 10 11 12 13 14 15 16 View Report Contacts - by Company 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 View Report View Report Vendors - Listed A to Z Sales Scripts Today is Wed 01/06/2016 🛗 🛛 Go to Today's Date View Report Products and Services View Report Sales Coach Administration X Exit Application

Reports Menu

MS Action! Sales Manager Includes a Number of Useful Reports

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Action! Sales Manager V1.2 Your Company Name Here Shortcut Menu Actions! Opportunities Companies Contacts V ReportsMenu 17 Enter New Action! 🗎 Reports Menu Close Actions! Enter New Opportunity Enter New Company Q Reports Exports Status: Pending Enter New Contact Export 17 Export - Company Data Date Туре Entry No Opportunity Performed By Enter New Vendor 17 📄 01/02/2016 Appointment 1004 Test 4 market Test Monica Burrill Export Enter New Resource Export - Vendor Data 17 📄 01/02/2016 Appointment Mark Rico Dpen Reports Menu 📅 📄 12/31/2015 Reminder Export 1004 Test 4 market Test Lisa Gale Export - Contacts - by Selected Sales Lead 12/31/2015 Note 1001 Craig Wilson Test Two ▲ Jan ▶ ▲ 2016 ▶ Export Export - Sales Pipeline Data - by Selected Sales Lead Su Mo Tu We Th Fr Sa 1 2 Export 3 4 5 **6** 7 8 9 10 11 12 13 14 15 16 Export - Sales Forecast Data - by Selected Sales Lead 17 18 19 20 21 22 23 Export Export - Products and Services 24 25 26 27 28 29 30 31 Export Export - Sales Script Entries Today is Wed 01/06/2016 🛗 🛛 Go to Today's Date Export Export - Sales Coach Entries Administration X Exit Application

Exports Menu

MS Action! Sales Manager Includes a Number of Exports Export Desired Data to Excel for Extended Reporting and Mail Merge Capabilities

_	
	Main Menu

Action! Sales Manager V1.2

Shortcut Menu	Actions! Opportunities Companies				
Enter New Action!		-B Administration Menu			
Enter New Opportunity	Actions!	Administration			
💓 Enter New Company	٩.	Action! Types Cost Centers Resource Types Sales Status Markets User Management Company Setup		Status: P	ending 💌
Enter New Contact		Action! Type 👻		-	
🚔 Enter New Yendor	Date Type	Phone - In Phone - Out	Entry No	Opportunity	Performed By
Enter New Resource	17 01/02/2016 Appointment	Letter	1004	lest 4 market lest	Mark Rico
🖨 Open Reports Menu	12/31/2015 Reminder	E-Mail Note	1004	Test 4 market Test	Lisa Gale
▲ Jan ▶ ▲ 2016 ▶	12/31/2015 Note	Followup	1001	Test Two	Craig Wilson
Su Mo Tu We Th Fr Sa		Quote			
3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31		Appointment Order Reminder *			
Today is Wed 01/06/2016					
🛗 Go to Today's Date					
Administration		Record: H 4 1 of 11 + H H			
X Exit Application					

Administration Menu

Setup Various Options Throughout the Application Setup Action! Types – Cost Centers – Resource Types - Sales Status and Other Dropdowns Admin Menu is Visible to Admin Users Only