# MIRACLESERVICE

## CRM - Companies Screen

**Sorting:**
- Click on a Column Header to sort in ascending or descending order.
- Or drag the Column Header here to group by that column.

**Customize Your View:**
- Click the 'Field Chooser' button.
- Select the field that you want to view from the Field Chooser list and drag it into position on the Header Bar here.
- Drag any Column Header that you want to remove from the Header Bar to the Field Chooser list to remove.
- Drag and drop the Column Headers in the Header Bar to change the order in which they appear.

**Need Help?**
- Click on the Help button to see instructions for the program.

Help    English ∨

### Your Company Name

Home > Companies > Companies

agoliger [ Logout ]

| Companies | ⌃ |
| --- | --- |
| 👤 Companies | |
| 👥 Contacts | |
| 📋 Contracts | |
| 🗐 Equipment | |

| Sales | ⌃ |
| --- | --- |
| 📋 Sales Quotes | |
| 📋 Sales Orders | |

| Reports | ⌃ |
| --- | --- |
| 🌐 Companies | |
| 🌐 Contacts | |
| 🌐 Sales Quotes | |
| 🌐 Quotes by Salesperson | |
| 🌐 Lost Quotes | |

| Activity Dashboard | ⌃ |
| --- | --- |
| 📈 New Companies | |
| 📈 New Sales Orders | |

Add New    Delete    Save as My View    Go To: My View ∨    Field Chooser    Records per page: 20 ∨

Drag a column header here to group by that column

| ☐ | Company Name ▲ | Company ID | Address 1 | City | State | Phone | Active | Prospect |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| ☐ | ACME Stone and Gravel | ACM00000014 | 1244 Wilber Watson Dr. | Buffalo | NY | 212-555-2345 | ☑ | ☑ |
| ☐ | Airlines Regional | AIR002 | 10368 Wallace Alley Street | Kingsport | QLD | 5552790788 | ☑ | ☐ |
| ☐ | Avant Guarde Corp. | Ava00000015 | | Abingdon | AB | | ☑ | ☑ |
| ☐ | Bail & Well Business Solutions | BAIL002 | 4001 Steelburgh Highway | Cedar Bluff | VA | 5559637336 | ☑ | ☐ |
| ☐ | Bank of Marion | BOM001 | 102 W Main St | Mississauga | VA | 5557833116 | ☑ | ☐ |
| ☐ | BK's Law Office | BKS001 | 634 Middle Creek Rd | Sevierville | TN | (555) 248-7632 | ☑ | ☐ |
| ☐ | Camp Processing | CAMP001 | 2146 Kings Mill Pike | Bristol | VA | 5554662311 | ☑ | ☐ |
| ☐ | Cave Office Products | CAV001 | 1235 VA KY Opry Building | Norton | VA | (555) 393-2967 | ☑ | ☐ |
| ☐ | Credit Woodland Cancer Centre | CVC001 | 1 Professional Park Dr | Chattanooga | TN | 5559260063 | ☑ | ☐ |
| ☐ | David Perdue, CPA | DPC001 | 225 Park Boulevard | Marion | VA | (555) 783-1551 | ☑ | ☐ |
| ☐ | Dept Of Motor Vehicles | DMV001 | 45568 Jefferson Blvd | Big Stone Gap | VA | (555) 523-8119 | ☑ | ☐ |
| ☐ | District IV Police Dept. | DST111 | 4453 Lee Highway | Marion | VA | (555) 783-7157 | ☑ | ☐ |
| ☐ | Dr. Mable Anderson | DMA001 | 512 Cherry Street | Bluefield | WV | 5553242719 | ☑ | ☐ |
| ☐ | Felton Real Estate | FEL001 | 1228 Gay Street | Dandridge | TN | (555) 397-7555 | ☑ | ☐ |

**Section:**
- Navigate to a new section by clicking on the tab.
- Tabs can be collapsed or expanded.

**Filter / Search:**
- When you see this 'filter' icon enter all or part of a word you are looking for in the box.
- Or click on the filter icon for more options.
- A quick way to find what you're looking for.

**Select:**
- Double-click anywhere on highlighted row to select and open.

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# MIRACLESERVICE

# CRM – User Screens

**User Screens Tab – how to get here:**
- From the main screen, double click on a specific company to open and view their information in a new window.
- Use the tab sections to navigate to the various areas.

**Custom Fields:**
- There are 10 Custom Fields that can be renamed to meet your requirements.
- These are "searchable" fields that also appear under the Field Chooser Window along with the standard fields (like company, address etc.)
- You can search, sort and report your data based on these fields.
- These Custom Fields are defined and setup in the Administration application.

[ AIR001 : Ai

| General | Pricing | Financial | User Screens | Contacts | Notes | Sales Quotes | Sales Orders | Documents | Contracts | Equipment |

**User Screens**

- Custom Fields
- Company Info(example)
- Sales Screen(example)

**Contents**

| Lead Source | Referral | << Update | Referral ▼ |
| Lead Priority | High | << Update | High ▼ |
| Next Step | Make Initial Contact | << Update | Make Initial Contact ▼ |
| Status | Stage One | << Update | Stage One ▼ |
| Current Supplier | Expensive Co. | << Update | Expensive Co. ▼ |
| Custom_Field6 | | << Update | Option a ▼ |
| Custom_Field7 | | << Update | ▼ |
| m_Field8 | | << Update | ▼ |
| m_Field9 | | << Update | ▼ |
| _Field10 | | << Update | ▼ |

Save

Close Window

**User Screens & Data Fields:**
- Your company can set-up User Screens to keep track of additional information. Each screen contains **data fields** that can be renamed to your requirements.
- These **data fields** are similar to custom fields however they are for storing and viewing information only. They are not "searchable" and do not appear in the Customization Window.
- These are useful for storing information that is important to retain but not something you would need to search (examples: company ownership, number of employees etc.)
- These are set-up in the Administration application.

**Custom Field:**
- In addition to using the pull-down menu choices, you can also enter freeform text in the field directly if required.
- Using the pull-down menus choices makes sorting, grouping and reporting the information easier *(for example generating a report to see all companies that currently using a particular competitor).*
- Therefore, whether or not to use freeform text would likely be a corporate decision.

**Pull-Down Menu Choices:**
- For each custom field you can define the choices in a pull-down menu. These are set-up in the Administration application.
- After you select the pull-down choice that you want, click on 'update' to populate your choice in the field.

Done

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# CRM - Contacts Screen

**Contacts Tab:**
- This screen shows <u>all</u> contacts for <u>all</u> companies. From here you use the 'Field Chooser' to sort, filter and modify the information to suit your needs.
- The contacts for a specific company can also be seen on the "Contacts" tab under each company. Tip: Click on the <u>company hyperlink</u> to get there in one click.
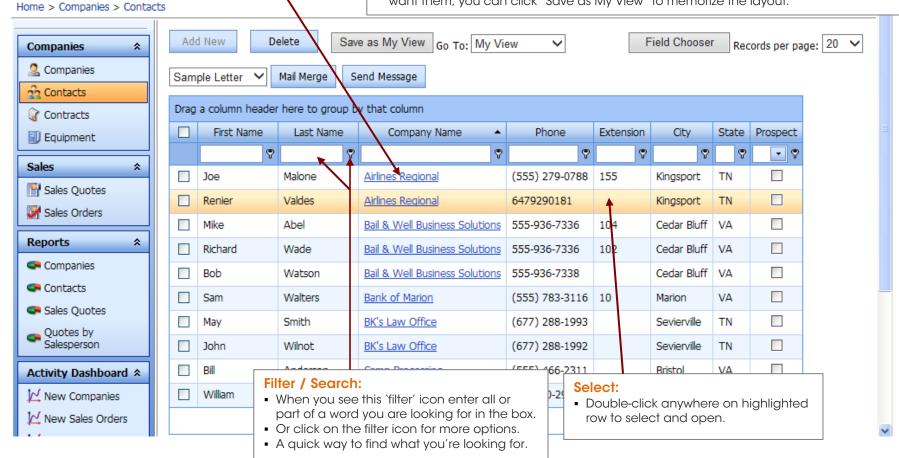
**Using Mail Templates** (also found under the Contacts Tab for each company):
- Using templates for letters and mail merges helps boost efficiency.
- Standard templates can be set-up in the Administration application.
- To use a template, click in the check box in the first column of the contact(s) that you wish to select. From the drop-down menu select your template and click on "Mail Merge". A new window will open with a Print Preview.
- To print, click on the "Print" button and enter your printer details. After printing, a copy of your document will be automatically saved as a new Note in the company's Notes Tab. See Help for more details.

**Save as My View**
- When you have finished using the 'Field Chooser' and moved the columns around as you want them, you can click "Save as My View" to memorize the layout.

## Your Company Name

Home > Companies > Contacts

**Companies** ⤒
- 👤 Companies
- 👥 Contacts
- 🖉 Contracts
- 📇 Equipment

**Sales** ⤒
- 📋 Sales Quotes
- 📑 Sales Orders

**Reports** ⤒
- 🔲 Companies
- 🔲 Contacts
- 🔲 Sales Quotes
- 🔲 Quotes by Salesperson

**Activity Dashboard** ⤒
- 📈 New Companies
- 📈 New Sales Orders

| Add New | Delete | Save as My View | Go To: My View | Field Chooser | Records per page: 20 |

Sample Letter | Mail Merge | Send Message

Drag a column header here to group by that column

| ☐ | First Name | Last Name | Company Name ▲ | Phone | Extension | City | State | Prospect |
|---|---|---|---|---|---|---|---|---|
| ☐ | Joe | Malone | Airlines Regional | (555) 279-0788 | 155 | Kingsport | TN | ☐ |
| ☐ | Renier | Valdes | Airlines Regional | 6479290181 | | Kingsport | TN | ☐ |
| ☐ | Mike | Abel | Bail & Well Business Solutions | 555-936-7336 | 104 | Cedar Bluff | VA | ☐ |
| ☐ | Richard | Wade | Bail & Well Business Solutions | 555-936-7336 | 102 | Cedar Bluff | VA | ☐ |
| ☐ | Bob | Watson | Bail & Well Business Solutions | 555-936-7338 | | Cedar Bluff | VA | ☐ |
| ☐ | Sam | Walters | Bank of Marion | (555) 783-3116 | 10 | Marion | VA | ☐ |
| ☐ | May | Smith | BK's Law Office | (677) 288-1993 | | Sevierville | TN | ☐ |
| ☐ | John | Wilnot | BK's Law Office | (677) 288-1992 | | Sevierville | TN | ☐ |
| ☐ | Bill | Anderson | Camp Processing | (555) 466-2311 | | Bristol | VA | ☐ |
| ☐ | William | | | 0-29 | | | | ☐ |

**Filter / Search:**
- When you see this 'filter' icon enter all or part of a word you are looking for in the box.
- Or click on the filter icon for more options.
- A quick way to find what you're looking for.

**Select:**
- Double-click anywhere on highlighted row to select and open.

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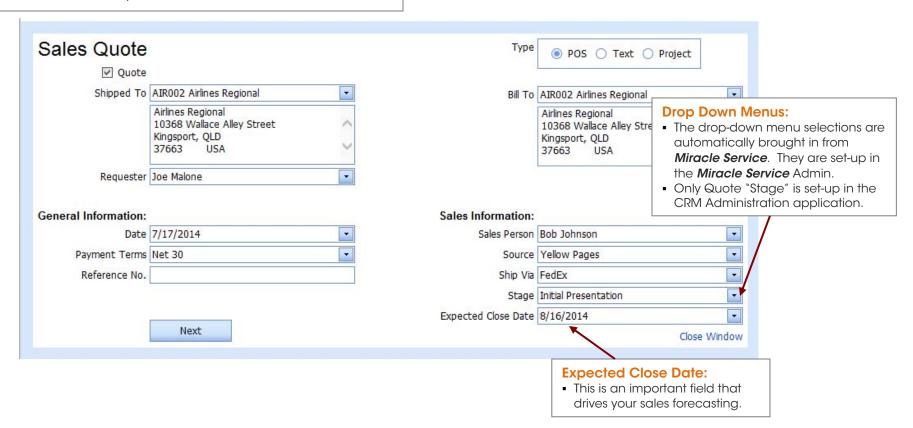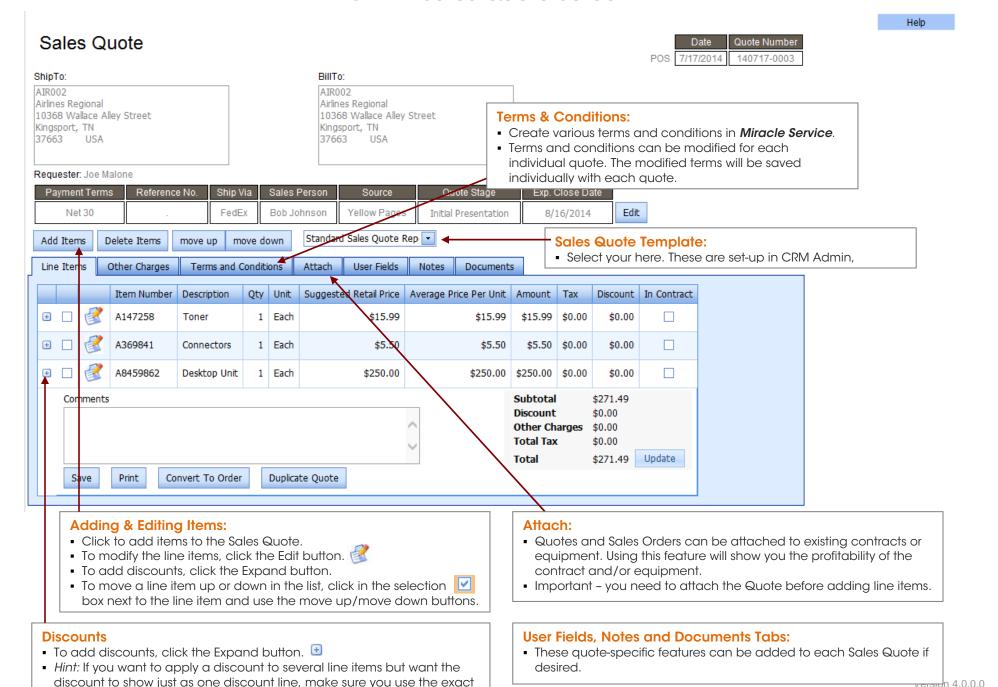**MIRACLE**SERVICE

**Quotes Screens – how to get here:**
- From the main screen, click on the Sales Quote tab in the left-hand menu bar and click the "Add New" button.
- Or, from within a specific customer's record, click on the 'Sales Quote' tab followed by the "Add New Quote" button.

## Sales Quote

Type: ⦿ POS  ◯ Text  ◯ Project

☑ Quote

Shipped To: AIR002 Airlines Regional

Airlines Regional
10368 Wallace Alley Street
Kingsport, QLD
37663      USA

Requester: Joe Malone

Bill To: AIR002 Airlines Regional

Airlines Regional
10368 Wallace Alley Stre
Kingsport, QLD
37663      USA

**Drop Down Menus:**
- The drop-down menu selections are automatically brought in from *Miracle Service*. They are set-up in the *Miracle Service* Admin.
- Only Quote "Stage" is set-up in the CRM Administration application.

**General Information:**

Date: 7/17/2014
Payment Terms: Net 30
Reference No.

**Sales Information:**

Sales Person: Bob Johnson
Source: Yellow Pages
Ship Via: FedEx
Stage: Initial Presentation
Expected Close Date: 8/16/2014

Next

Close Window

**Expected Close Date:**
- This is an important field that drives your sales forecasting.

# MIRACLESERVICE

## CRM – Sales Quote Screen #2

Help

## Sales Quote

|  | Date | Quote Number |
|---|---|---|
| POS | 7/17/2014 | 140717-0003 |

**ShipTo:**

AIR002
Airlines Regional
10368 Wallace Alley Street
Kingsport, TN
37663    USA

**BillTo:**

AIR002
Airlines Regional
10368 Wallace Alley Street
Kingsport, TN
37663    USA

**Requester:** Joe Malone

**Terms & Conditions:**
- Create various terms and conditions in *Miracle Service*.
- Terms and conditions can be modified for each individual quote. The modified terms will be saved individually with each quote.

| Payment Terms | Reference No. | Ship Via | Sales Person | Source | Quote Stage | Exp. Close Date | |
|---|---|---|---|---|---|---|---|
| Net 30 | . | FedEx | Bob Johnson | Yellow Pages | Initial Presentation | 8/16/2014 | Edit |

[ Add Items ] [ Delete Items ] [ move up ] [ move down ]   [ Standard Sales Quote Rep ▼ ]

**Sales Quote Template:**
- Select your here. These are set-up in CRM Admin,

**Tabs:** Line Items | Other Charges | Terms and Conditions | Attach | User Fields | Notes | Documents

| | | | Item Number | Description | Qty | Unit | Suggested Retail Price | Average Price Per Unit | Amount | Tax | Discount | In Contract |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ⊞ | ☐ | ✎ | A147258 | Toner | 1 | Each | $15.99 | $15.99 | $15.99 | $0.00 | $0.00 | ☐ |
| ⊞ | ☐ | ✎ | A369841 | Connectors | 1 | Each | $5.50 | $5.50 | $5.50 | $0.00 | $0.00 | ☐ |
| ⊞ | ☐ | ✎ | A8459862 | Desktop Unit | 1 | Each | $250.00 | $250.00 | $250.00 | $0.00 | $0.00 | ☐ |

**Comments**

| | |
|---|---|
| Subtotal | $271.49 |
| Discount | $0.00 |
| Other Charges | $0.00 |
| Total Tax | $0.00 |
| Total | $271.49 |

Update

[ Save ] [ Print ] [ Convert To Order ] [ Duplicate Quote ]

**Adding & Editing Items:**
- Click to add items to the Sales Quote.
- To modify the line items, click the Edit button. ✎
- To add discounts, click the Expand button.
- To move a line item up or down in the list, click in the selection box next to the line item and use the move up/move down buttons. ☑

**Attach:**
- Quotes and Sales Orders can be attached to existing contracts or equipment. Using this feature will show you the profitability of the contract and/or equipment.
- Important – you need to attach the Quote before adding line items.

**Discounts**
- To add discounts, click the Expand button. ⊞
- *Hint:* If you want to apply a discount to several line items but want the discount to show just as one discount line, make sure you use the exact same discount name, and it will group the discounts together as one.

**User Fields, Notes and Documents Tabs:**
- These quote-specific features can be added to each Sales Quote if desired.

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