



Account Executive User Guide

56 Hudson Street Northboro, MA 01532
800-833-4459 Fax: 508-393-0255
www.wireready.com

ACCOUNT EXECUTIVES: NAVIGATING SALESREADY4

NAVIGATING THE DATABASE TO FIND YOUR ACCOUNTS 4
 Using the Search/ Sort functions 4
 Using the List button to print or view specific information for any account(s) 9
 List Type 9
 Source 9
 Destination 9
 Delimiter 9
UPDATING YOUR ACCOUNTS IN THE DATABASE TO REFLECT YOUR DAILY ACTIVITY 10
 Schedule button & Change Schedule button 10
 1. On a new account or new deal on that account: 10
 2. On an existing deal that only needs to be updated: 13
 Protect Buttons (Do Not Call Requests, Bad Telephone Numbers and Protected Accounts) 15
 Recording Information about the Customer contacts 16
 To Access the Customer Profile page 16

APPENDIX A: QUICK SYNOPSIS OF EACH BUTTON AND MENU ITEM IN SALESREADY 25

DATABASE WINDOW 25
 Button Name: F2 Show 25
 Button Name: F3 Find ID 25
 Button Name: F4 Add 25
 Button Name: F6 Report 25
 Button Name: Ctrl + U User 25
 Button Name: View Record 25
 Button Name: Delete Record 26
 Button Name: Event Info 26
 Button Name: List 26
SALES ENTRY WINDOW 26
 Button Name: Schedule 26
 Button Name: Chng Schedule 3 26
 Button Name: Print 27
 Button Name: Change Pitch 27
 Button Name: Delete Pitch 27
 Button Name: Event Info (first explained above) 27
 Button Name: Evnt Materials 27
 Button Name: Contracts 27
 Button Name: Contact Info 27
 Button Name: Stats 27
 Button Name: Email 28
 Button Name: Open Notes 28
 Button Name: View Old Calls 28
 Button Name: Record 28
 Button Name: Start Call 28

<i>Button Name: End Call</i>	28
<i>Button Name: New Pitch</i>	28
<i>Button Name: Done</i>	28
<i>Button Name: Cancel</i>	28
<i>Button Name: Help</i>	29
<i>Button Name: Change (town or category)</i>	29
<i>Button Name: Protect 1 (Phone Number)</i>	29
<i>Button Name: Change (callback date)</i>	29
<i>Button Name: Protect 2 (Fax Number)</i>	29
EVENT MATERIALS WINDOW.....	30
<i>Button Name: Launch</i>	30
<i>Button Name: Cancel</i>	30
<i>Button Name: New File</i>	30
<i>Button Name: Edit Selected</i>	30
<i>Button Name: Help</i>	30
<i>Button Name: Event Info 1</i>	30
<i>Button Name: View Notes</i>	31
<i>Button Name: Edit Notes</i>	31
<i>Button Name: Launch As Form</i>	31
<i>Button Name: Copy As Template</i>	31
<i>Button Name: Print ALL as Form</i>	31
<i>Button Name: Print ALL Folders as Form</i>	31

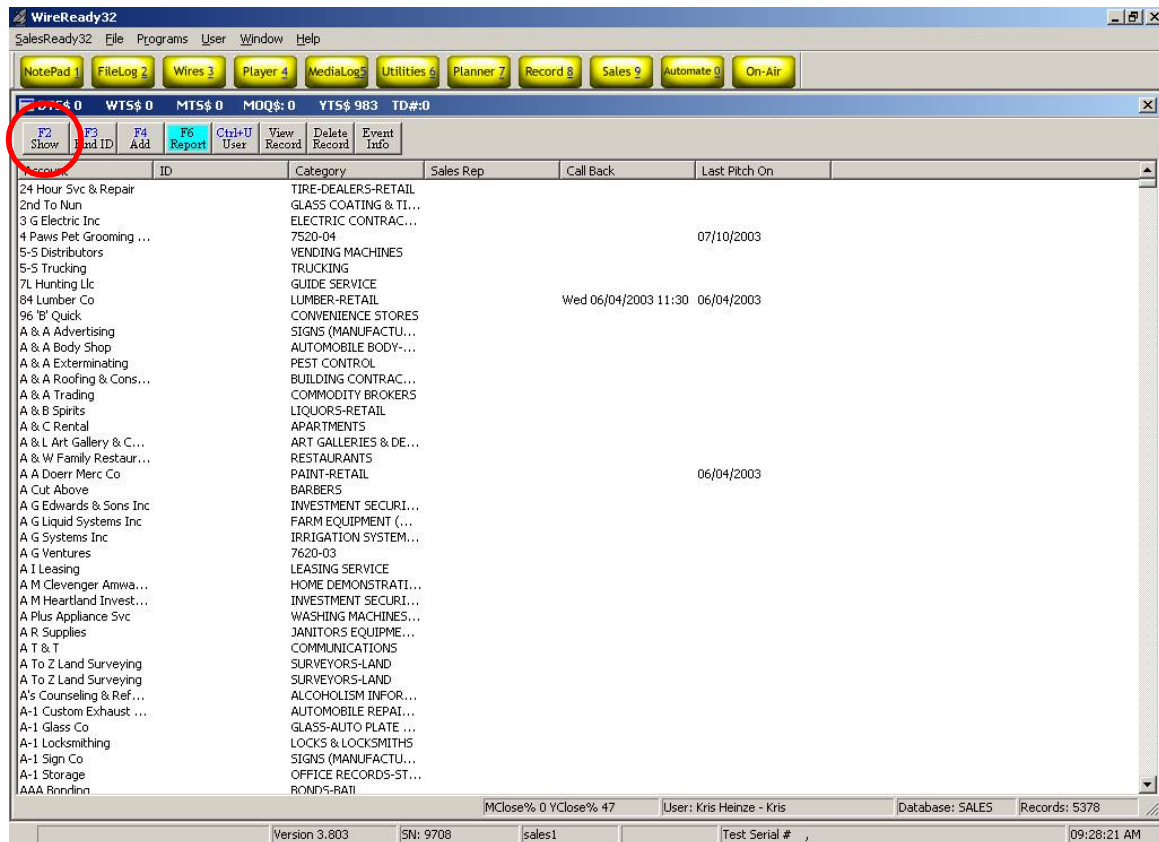
Account Executives: Navigating SalesReady

This document is written assuming the user has previously learned how to start the software, and more specifically, start the sales section of the software. Basic computer operation skills are also assumed. If you are not familiar with WireReady32, consult the *Community Event Coordinator Handbook*.

Navigating the database to find your accounts

Using the Search/ Sort functions

The **F2 Show** button allows a user to display accounts based on specific criteria. See the diagram below to find the **F2 Show** button.



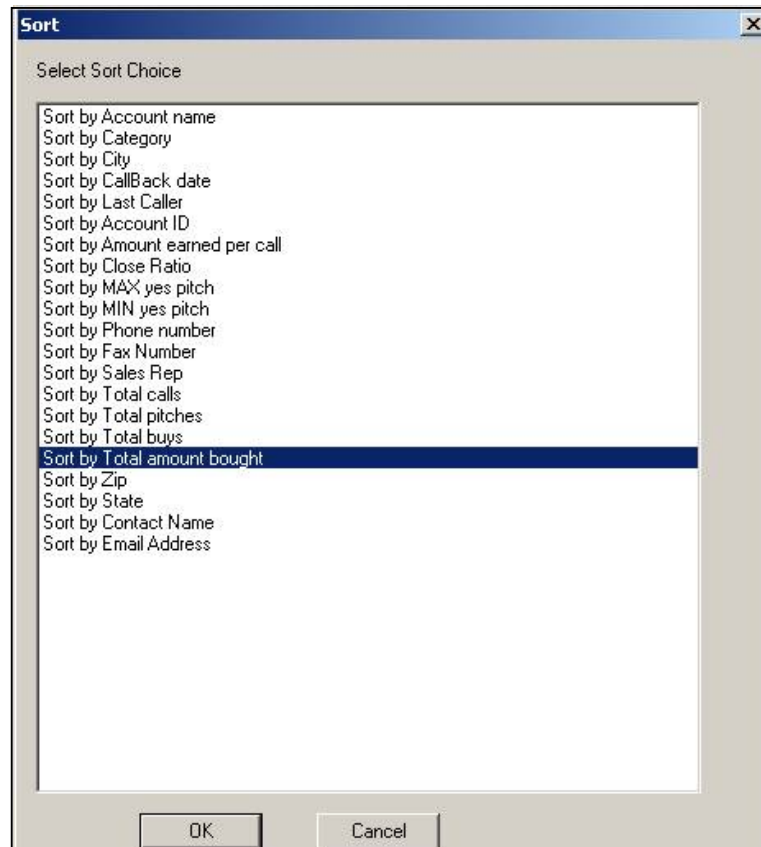
When you click the **F2 Show** button, SalesReady® will ask you to choose the specifications of your account sort. There are many different ways to sort the database and we will cover those methods most likely used by an account executive.

- To display a specific record or set of records, choose:
SEARCH: Show matching text...sort by...
This is the most popular way to view any account or group of accounts. Any bit of information can be used, be it the name of the account, the name of the contact person, the name of the street where the business is located or the account number that the station has assigned, the category of the business, etc.

1. Double-click **Show matching text...sort by...**
2. Type in the information you want to use to find the account (typically, the fewer letters, the better), and click **OK** or strike the **Enter** key.



3. Double-click your preferred sorting method for the list of accounts that will be displayed.

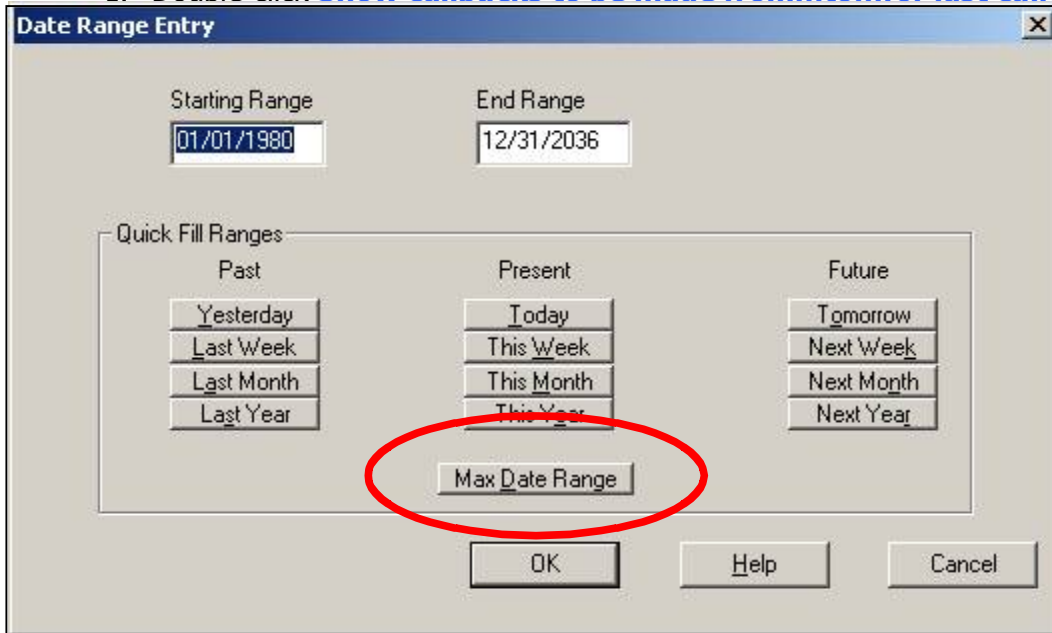


- After sorting, the SalesReady® database will display only those records including the text that was asked for. See the results below:

Total Bought	Account	ID	Category	Sales Rep	Call Back	Last Pitch On
0	Accent & Designs By ...		FLORISTS-RETAIL			
0	Accents Flower Shop		FLORISTS-RETAIL			
0	Alpena Florist		FLORISTS-RETAIL			
0	B-Lonnie's Florist & Brid		FLORISTS-RETAIL			
0	Bittersweet Floral		FLORISTS-RETAIL			
0	Blossom Shop		FLORISTS-RETAIL			
0	Branson Floral & More		FLORISTS-RETAIL			
0	C & C Floral & Gifts		FLORISTS-RETAIL			
0	C & C Flowers		FLORISTS-RETAIL			
0	Cardinal Floral Supply...		FLORISTS-WHOLESALE			
0	Caspian Flowers & Gifts		FLORISTS-RETAIL			
0	Cassville Smith Florist		FLORISTS-RETAIL			
0	Cedar Square Floral		FLORISTS-RETAIL			
0	Country Mart		FLORISTS-RETAIL			
0	Country Mart		FLORISTS-RETAIL			
0	Crystal Rose		FLORISTS-RETAIL			
0	Deb's Petals & Presents		FLORISTS-RETAIL			
0	Deco Floral Designs		FLORISTS-RETAIL			
0	Donna Kay's House o...		FLORISTS-RETAIL			
0	Doyle's Flowers		FLORISTS-RETAIL			
0	Dudley's Plants & Petals		FLORISTS-RETAIL			
0	Enchanted Cottage		FLORISTS-RETAIL			
0	Eureka Flower Shop		FLORISTS-RETAIL			
0	Flippin Florist/Flower Bo		FLORISTS-RETAIL			
0	Floral Creations Decor		FLORISTS-RETAIL			
0	Flower Peddler		FLORISTS-RETAIL			
0	Flower Shop		FLORISTS-RETAIL			
0	Forsyth Posie Patch		FLORISTS-RETAIL			
0	Gabrieles Flower Sho...		FLORISTS-RETAIL			
0	Golden Dragon of Ga...		FLORISTS-SUPPLIES ...			
0	Green Forest Flowers...		FLORISTS-RETAIL			
0	Hambelton's Flower S...		FLORISTS-RETAIL			
0	Happy Memories Bask...		FLORISTS-RETAIL			
0	Harrison Flower & Gift		FLORISTS-RETAIL			
0	Hazel's Flowers		FLORISTS-RETAIL			
0	Heaven Scent Floral		FLORISTS-RETAIL			
0	Just For You Floral & Gif		FLORISTS-RETAIL			
0	Kay's Floral Affair & Gar		FLORISTS-RETAIL			
0	Lena Frances Flower ...		FLORISTS-RETAIL			

- To view all the callbacks you've ever scheduled, choose:
SEARCH: Show callbacks to be made from...to...for last caller
This search is good to clean up any callbacks that you have forgotten about or missed from days past. See the following diagrams to view all your past callbacks.

1. Double-click **Show callbacks to be made from...to...for last caller.**



- Choose your name from the list of users to view your callbacks.
- The screen will display only your callbacks yet to be made.



- To view your callbacks for today only, choose:
SEARCH: Show today's callbacks for last caller...sort by...
This is the most popular callback sort.
 1. Double-click **Show today's callbacks for last caller...sort by...**
 2. Choose your name from the list of callers.
 3. SalesReady® will then refresh with the list of callbacks scheduled for today.

- To view your list of accounts and related activity, choose:
SEARCH: Show hot leads...pitched by caller...in date range...sort by...
This is a popular way to keep track of the most important negotiations you have in the works. Any account in the list can be double-clicked for a closer look at the details for that deal.
 1. Double-click Show **HOT LEADS... pitched by CALLER...in DATE RANGE...sort by...**
 2. Choose your name from the list of callers
 3. Choose your time frame (this month, next month, etc)
 4. Sort the list however you like (alphabetical, categorical, etc)
 5. The screen will refresh with all the accounts in which you have logged a lead (sure, hoped for, expected).

Using the List button to print or view specific information for any account(s)

No more waiting for the billing department to get you a list of addresses and phone numbers for your accounts. The List button allows users to create a list of accounts to be printed, saved to a file or viewed on-screen.

List Type

- **Calling List:** Generates a list of accounts that includes Account Name, Contact, Contact Title and Phone Number fields, sorted in the order they appear on the screen.
- **Mailing Label Data:** Generates a list of accounts that includes Account, Contact, Title, Address1, Address2, City, State and Zip Code fields, sorted in the order they appear on the screen.
- **Current Browser:** Generates a list of accounts that includes the fields currently displayed on the screen, sorted in the order they appear on the screen.

Source

- **Selected Records:** Uses only the records that are selected (highlighted) in the list of accounts for the output. You have the freedom to select only the records you need.
- **Entire Browser:** Uses all the records currently displayed on the screen in the browser for the output.

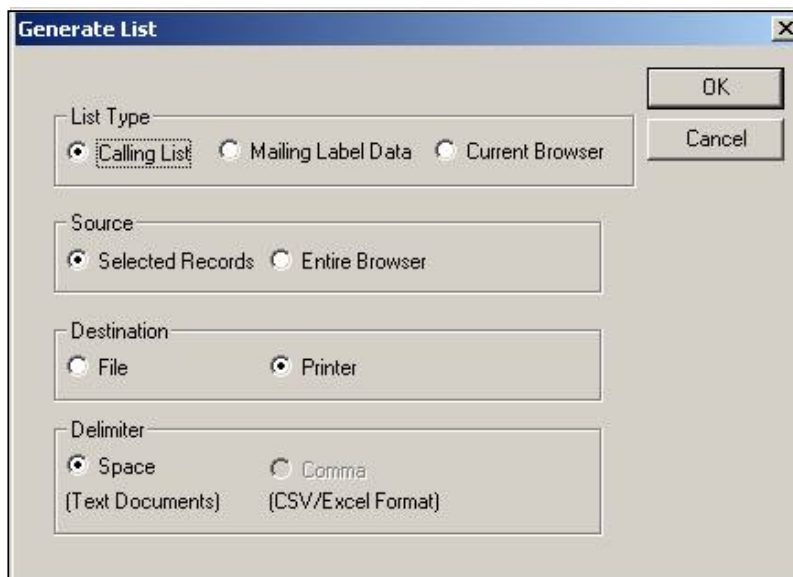
Destination

- **File:** The list will be created into a file that can be stored in any folder available to the user. When giving the file a name, include the extension.
- **Printer:** The list will be generated and sent to the printer.

Delimiter

- **Space (Text Documents):** The list will be generated as a text file. A choice for both File and Printer output.
- **Comma (CSV/Excel Format):** The list will be generated as a Comma Separated Value file. This option is only available when saving to a destination file.

See the diagram below:



Updating your accounts in the database to reflect your daily activity

In just a few minutes per day, you can update your accounts in SalesReady. That information is then at your fingertips when you need it most.

Schedule button & Change Schedule button

When you are ready to update the activity on the deal on a particular account, you navigate the database to find that account and then double-click to open.

1. On a new account or new deal on that account:

Start by clicking the **Schedule** button. See the diagram on the below to find the Schedule button:

The screenshot shows the 'Sales Entry' window with the following details:

- Account Name: 2 Thread Heads
- Category: EMBROIDERY
- Phone Number: 417-581-5491
- Call Back Date: 12/15/2003, Time: 14:51
- Contact Name: Brenda Matlock
- Account ID: [Empty]
- Last Caller: [Dropdown]
- Sales Rep: [Dropdown]
- Fax Number: [Empty]
- Position / Title: Owner
- SIC Code: 7389-42

Date	Caller	Time	Len	Event #	Event	Buy	\$Amt	Notes
12/08/03	kris	14:51	0.0	115	LetterstoSanta	1 Sure	2500	

Buttons at the bottom: Schedule (circled in red), Change Pitch, Event Info, Contact Info, Open Notes, Chng Sched 3, Delete Pitch, Evt Materials, Stats, View Old Calls, Print, Contracts, Email, Record, Start Call, End Call, New Pitch, Done, Cancel, Help.

Start by entering the date that you expect to close the deal.

The dialog box contains the following information:

- Date: 12/ 9/2003
- Time: 09:37
- Buttons: OK, Cancel, Help
- Text: Set the date and time of the future event, or Hot lead(expected sale) for kris. Note: if you need to schedule events for other reps you need to have your manager's permission and the ability to change rep setting.

Next, enter details about the deal. The associated event or programming, the amount, your perception of the likelihood of closing the deal (hoped for, expected, sure), and set a callback date if you like. See the diagram on the following page.

The screenshot shows the 'New Pitch' window with the following fields and options:

- Called Party Information:** Calling: Brenda Matlock; Company: 2 Thread Heads; Number: 4175815491
- Event Filter:** [Empty text box]
- Event Name:** 115 LetterstoSanta (selected from a list including 106 ChildDentalMo, 107 WomensHistor, 108 StopVandalism, 109 CommunityBoo, 110 AlcoholAwareh, 111 DairyMonth, 112 FairReports, 113 SpaceShuttleC, 114 HS_SportsBoo, 115 LetterstoSanta)
- Did They Buy?:** Radio buttons for: 1 Sure (70%) (selected), 2 Expected (50%), 3 Hope (20%), Yes/In, No, Undecided, Other
- Dollar Amount Pitched:** 2500
- Call Back:** Callback Date: 12/16/2003; Callback Time: 09:44; Buttons: Later Today, Tomorrow, Next Week, Next Month, No Callback
- Call Notes (10 character limit):** [Empty text box]
- Notes:** To be sole sponsor of the special programming on WXXW

Red arrows point to the '115 LetterstoSanta' event name and the '2500' dollar amount.

Simply click **End Pitch** to save your information, and then click **Done** to exit the customer record.

2. On an existing deal that only needs to be updated:

Start by clicking on the deal that needs to be updated. See the diagram below.

Sales Entry

File Edit View Schedule

Account Name: 2 Thread Heads Account ID: []
Category: EMBROIDERY Change Last Caller: []
Phone Number: 417-581-5491 Protect 1 Sales Rep: []
Call Back Date: 12/15/2003 Time: 14:51 Change Fax Number: [] Protect 2
Contact Name: Brenda Matlock Position / Title: Owner
Summary Notes: [] SIC Code: 7389-42

Date	Caller	Time	Len	Event #	Event	Buy	\$Amt	Notes
12/08/03	kris	14:51	0.0	115	LetterstoSanta	1 Sure	2500	

Schedule Change Pitch Event Info Contact Info Open Notes
Chng Sched 3 Delete Pitch Evnt Materials Stats View Old Calls
Print Contracts Email Record Start Call End Call New Pitch Done Cancel Help

Next, click the **Chng Sched 3** button to update the information for this deal. You'll be prompted to update the expected date of close. Use the drop down calendar to click on the date, rather than typing it into the box.

12/ 9/2003 09:37

OK Cancel Help

time of the future event,
ected sale) for kris
to schedule events for other reps
your manager's permission
change rep setting

December, 2003

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	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	1	2	3
4	5	6	7	8	9	10

Today: 12/9/2003

The New Pitch window will open, containing all the information you have previously entered about this deal (the event, amount, likelihood of close, callback date, etc). Update any information that needs to be updated and hit the **End Pitch** button. Remember to click the **Done** button to save the information when you exit the customer record.

Protect Buttons (Do Not Call Requests, Bad Telephone Numbers and Protected Accounts)

Blocking accounts is not an action to be taken lightly. If your group uses SalesReady for both Account Executives and Telesales, there may be a need to “protect” the AE accounts from being called upon by the telesales persons. The protect buttons can offer a control mechanism, but can work against you if don’t speak with your sales manager before you decide to protect an account.

The system can be configured 3 ways to handle blocked accounts.

1. Accounts can be viewed by everyone, but the phone numbers will be altered depending on the type of block you put on the account.
2. They can disappear entirely from the database—no one will be able to bring up that account in any search, except the sales manager.
3. They can be locked out. The account will turn red in the database, and only the sales rep who owns the account will be able to view and edit it.

When you have spoken with your sales manager and are aware of the consequences of blocking an account, you may proceed.

To block an account, you simply click the Protect Button near the phone number or fax number, depending on which you wish to block. A box pops up with 3 reasons for blocking this number. You must click the radio button that corresponds with your reasoning. See the diagram on the following page.

- **Do Not Call:** Used when the customer has requested not to be called.
- **Bad Number:** Used when the phone number is known to be bad or disconnected. This is used more in telesales than anything.
- **Protect:** Used to restrict access to the account so that only the rep who owns it may access and edit.

The screenshot shows the 'Sales Entry' application window. The 'Block Number' dialog box is open, asking 'How should the number be blocked?' with three radio button options: 'Do Not Call', 'Bad Number', and 'Protect'. The 'Protect' option is selected. The background window shows account details for '4-M Painting' with phone number '660-885-8927'. Red arrows point to the 'Protect 1' button next to the phone number and the 'Protect 2' button next to the fax number field.

Copyright © 2002-2003 WireReady NSI. For use by the SalesReady customer, their employees, and their advertisers only. Not for reproduction, duplication or distribution in part or whole, to third parties outside your facility without the expressed written permission of WireReady NSI.

SalesReady 24/7 technical and sales support line (800) 833-4459.

R:\2007\web\wr\techsupport\newtechsupport\shpdocs\sales\AE User Features Handbook-LATEST.doc/Last saved by Kris on 10/11/2007

Recording Information about the Customer contacts

To Access the Customer Profile page

Open the account to add information about the business and the main contact persons. Click on the **Cust. Profile** button at the bottom of the Sales Entry screen.

Sales Entry [X]

File Edit View Schedule

Account Name: Account ID:

Category: Last Caller:

Phone Number: Sales Rep:

Call Back Date: Time: Fax Number:

Contact Name: Position / Title:

Summary Notes: User1:

Date	Caller	Time	Len	Event #	Event	Buy	\$Amt	Notes
05/30/03	wiki	12:56	0.3	80	ChildPassSa...	N No	0	not in
05/21/03	wiki	10:34	1.5	80	ChildPassSafety	O Other Ty...	0	faxd info
05/20/03	wiki	12:20	2.4	80	ChildPassSafety	? Undecided	0	
02/10/03	wiki	15:38	2.6	69	CancerControlMo	L Leader	75	see notes
12/05/02	Amy	13:28	0.4	21	ElectionThanks	X Letter	0	nver in
12/05/02	Amy	10:27	1.8	21	ElectionThanks	X Letter	0	left msg
12/04/02	Amy	13:31	0.6	21	ElectionThanks	X Letter	0	
12/04/02	Amy	10:54	2.1	21	ElectionThanks	X Letter	0	
11/27/02	Amy	11:59	0.6	21	ElectionThanks	X Letter	0	lateaftern
11/26/02	Amy	14:53	1.9	21	ElectionThanks	F Fax	187	

The **SalesReady Profile Database Entry Dialog** screen will open. This screen allows the user to enter information about the main customer contacts and decision makers for the account, along with information about the demographics, needs, budget and goals of the business.

Contact/Personal Information

The **Contact Info** tab allows information about 3 Decision Makers to be stored for this account. Either the mouse or the **Tab** key can be used to navigate between fields and tabs. Clicking the **OK** button or striking the **Enter** key will close the Profile Database Entry Dialog window. Once information is entered into a field, and the cursor is moved to another field, that information will be saved.

On the **Decision Maker** tab, enter the name of the first decision maker. Once the field is filled out and the cursor is moved to another field, the **1 Edit Decision Mkr** button will display the entered name.

Fill in the other fields for the first decision maker on this tab.

Decision Maker | Lifestyle | Family Info | Prof. Organizations/Goals

1 Edit: Decision Mkr | 2 Edit: Decision Mkr | 3 Edit: Decision Mkr

Decision Maker Name Nickname Title

Direct Phone Number

Birthday

Education

Some High School High School Grad Some College College Graduate Grad School

High School College Grad School

Year Year Year

Special Interest

Clubs

Politically Active Party Importance

Active in Community Explain

Click on the **Lifestyle** tab to enter information on the decision maker's favorite restaurant, achievements and goals.

The screenshot shows a web form with a tabbed interface. The tabs are "Decision Maker", "Lifestyle", "Family Info", and "Prof. Organizations/Goals". The "Lifestyle" tab is selected. Below the tabs are three buttons: "1 Edit: Decision Mkr", "2 Edit: Decision Mkr", and "3 Edit: Decision Mkr". The form contains several checkboxes and text input fields:

- Consume Alcohol? Offended when others consume Alcohol?
- Smoker? Offended when others smoke?
- Favorite Restaurant: [Text Input Field]
- Hobbies: [Text Input Field]
- Favorite Sport Teams: [Text Input Field]
- Proudest Achievement (non-business): [Text Input Field]
- Favorite Recreation Location: [Text Input Field]
- Goal for next five years: [Text Input Field]

Click on the **Family Info** tab to enter information about the first decision maker's spouse and children.

The screenshot shows a web form with a tabbed interface. The tabs are "Decision Maker", "Lifestyle", "Family Info", and "Prof. Organizations/Goals". The "Family Info" tab is selected. Below the tabs are three buttons: "1 Edit: Decision Mkr", "2 Edit: Decision Mkr", and "3 Edit: Decision Mkr". The form contains several radio buttons, text input fields, and a checkbox:

- Marital Status: Single Married Divorced Widower/Widow
- Spouse's Name: [Text Input Field]
- Wedding Anniversary: [Text Input Field]
- Children Information: [Text Input Field]
- Does lient have custody of children?
- Spouse's Interests: [Text Input Field]

Click on the **Prof. Organizations/Goals** tab to enter information about the first decision maker's involvement in professional organizations and business goals.

The screenshot shows a software interface with a tabbed menu at the top. The tabs are 'Decision Maker', 'Lifestyle', 'Family Info', and 'Prof. Organizations/Goals', with the last one being selected. Below the tabs are three buttons: '1 Edit: Decision Mkr', '2 Edit: Decision Mkr', and '3 Edit: Decision Mkr'. The main content area is divided into two sections. The first section is titled 'Professional Organizations' and contains two input fields: 'Professional Organizations' and 'Awards or Titles in Professional Organization'. The second section is titled 'Business Objectives' and contains two input fields: 'Short Term Business Goal' and 'Long Term Business Goal'.

Click on the **Decision Maker** tab to enter information on the second and third decision maker/contact at that account, if needed.

While in the Contact Info screen, you can click on any of the 3 decision maker buttons to switch to information about that contact.

Customer Demographics

Click on the **Customer Demographics and Profit Areas** tab to enter information about customer base and profit areas for the business.

The screenshot shows a software dialog box titled "SalesReady Profile Database Entry Dialog". It has several tabs: "Contact Info", "Customer Demographics and Profit Areas" (which is selected), "Needs Assessment", "Budget/ROI Plannint", and "Misc".

Under the "Customer Demographics" section, there are two rows of checkboxes:

- Row 1: Teens, 18 - 24, 25 - 34, 35 - 44, 45 - 54, 55 +
- Row 2: Men, Women, Couples

Below this is a "Business Concentration" section with a large empty text box and a vertical scrollbar.

The "Profit Areas" section contains a table with two columns: "Percent" and "Description". There are five rows, each with a text box containing "0" in the "Percent" column and an empty text box in the "Description" column.

At the bottom right of the dialog are three buttons: "OK", "Cancel", and "Apply".

Check off the **Customer Demographics** that apply to the business in the top section of this page.

Enter the **Business Concentration** and **Profit Areas** that this business currently focuses on.

Needs Assessment

Click on the **Needs Assessment** tab to enter reasons that the customer should be advertising.

The screenshot shows a dialog box titled "SalesReady Profile Database Entry Dialog" with a tabbed interface. The "Needs Assessment" tab is selected. The dialog contains a list of 18 reasons for advertising, each with a checkbox. The "Promote Web Site" checkbox is checked. Below the list is a "Notes:" text area. At the bottom right, there are "OK" and "Cancel" buttons. At the bottom center, there are "OK", "Cancel", and "Apply" buttons.

Needs - Check off the top reasons for this customer should advertise

<input type="checkbox"/> Advertise Location (alt-a)	<input type="checkbox"/> Expand Demographics (alt-j)	<input type="checkbox"/> Promote New Store Openings (alt-s)
<input type="checkbox"/> Better Return on Investment (alt-b)	<input type="checkbox"/> Expand Technographics (alt-k)	<input checked="" type="checkbox"/> Promote Web Site (alt-t)
<input type="checkbox"/> Build Internal Morale (alt-c)	<input type="checkbox"/> Generate New Customers (alt-l)	<input type="checkbox"/> Recruitment/Personnel (alt-u)
<input type="checkbox"/> Build the Brand (alt-d)	<input type="checkbox"/> Increase Name Awareness (alt-m)	<input type="checkbox"/> Reinforce Market Position (alt-v)
<input type="checkbox"/> Build Store Traffic (alt-e)	<input type="checkbox"/> Internal Promotions (alt-n)	<input type="checkbox"/> Retail Merchandising (alt-w)
<input type="checkbox"/> Compliment External Marketing (alt-f)	<input type="checkbox"/> Move Old Inventory (alt-o)	<input type="checkbox"/> Support Sales Objectives (alt-x)
<input type="checkbox"/> Counter Attack Competitives (alt-g)	<input type="checkbox"/> Niche Marketing (alt-p)	<input type="checkbox"/> Use Available Co-Op Dollars (alt-y)
<input type="checkbox"/> Educate Consumers (alt-h)	<input type="checkbox"/> Promote e-commerce (alt-q)	<input type="checkbox"/> Web Site (alt-z)
<input type="checkbox"/> email Marketing (alt-i)	<input type="checkbox"/> Promote New Merchandise (alt-r)	<input checked="" type="checkbox"/> Other (alt-1)

Notes:

OK Cancel

OK Cancel Apply

Check off as many reasons to advertise as apply to this customer, and any unique needs in the **Notes** entry box.

Click on the upper **OK** button to save the changes to this page.

Advertising Budget

Click on the **Budget/ROI Planning** button to enter information about the customer's monthly and annual advertising budget.

The screenshot shows a software dialog box titled "SalesReady Profile Database Entry Dialog" with a close button (X) in the top right corner. The dialog has several tabs: "Contact Info", "Customer Demographics and Profit Areas", "Needs Assessment", "Budget/ROI Planning" (which is selected and highlighted in blue), and "Misc".

Under the "Budget/ROI Planning" tab, there is a section titled "Budget Planning" containing a table with columns for "Direct Mailing", "Internet", "Outdoor", "Print Media", "Radio", "Television", and "Total". There are two rows for "Monthly Budget" and "Annual Budget", each with input fields for each category, all containing the number "0". Below the table is a "Notes" text area.

Below the "Budget Planning" section is a section titled "Return on Investment Worksheet" which contains a grid of empty input boxes for data entry.

At the bottom right of the dialog are three buttons: "OK", "Cancel", and "Apply".

Enter in monthly values for the dollar amounts spent or available for each type of advertising. The totals will be calculated based on the values entered. Enter whole dollar amounts, without the decimal and cents.

Additional Miscellaneous Information

Click on the **Misc** tab to record information about traffic volume, public image, and other information that may be useful in developing a solid sales strategy for this customer.

The screenshot shows a software dialog box titled "SalesReady Profile Database Entry Dialog" with a close button (X) in the top right corner. The dialog has a tabbed interface with the following tabs: "Contact Info", "Customer Demographics and Profit Areas", "Needs Assessment", "Budget/ROI Plannint", and "Misc". The "Misc" tab is currently selected and highlighted in blue. The main area of the dialog contains a grid of text input fields for recording miscellaneous information. The fields are arranged as follows:

Busiest Time		Slowest Time	
Objective			
Previous Adv		Attitude	
Current Traffic		Est. Growth	
Competitors		Advantages	
Public Perception		Who isn't buying	
Image		Track Results	
% of Repeat Business			
New Product Service			
Sales		Expected Results	
Other Locations		Co-op \$	
Misc			

At the bottom right of the dialog, there are three buttons: "OK", "Cancel", and "Apply".

Click the **OK** button or strike the **Enter** key to close the SalesReady Profile Database Entry Dialog window and return to the Sales Entry screen.

Appendix A: Quick synopsis of each button and menu item in SalesReady

Database Window

To get to the SalesReady Database Window, you must first start the WireReady software from the computer desktop, login, and then click on the yellow **Sales-9** button at the top right of the screen.

Button Name: F2 Show

Function: Standard window button

Use: To sort or organize the entire database or narrow the database to a manageable list of accounts. Lists can be sorted by city, category, zip code, total amount bought, callbacks scheduled...just about any sort parameter you would need.

Button Name: F3 Find ID

Function: Standard window button

Use: To quickly find a particular account(s) using an ID number only. Unique ID numbers have to be assigned account-by-account before the search can be utilized.

Button Name: F4 Add

Function: Standard window button

Use: To enter a new account to the database.

Recommended Users: The AE Director/ Team Leader

Button Name: F6 Report

Function: Standard window button

Use: To monitor sales progress or event progress using software-generated reports. Reports can be generated on one caller, all callers, one event, all events, monthly sales, or leads. Instead of gathering this information by hand, the software tracks it for you and bundles it into a summarized report.

Button Name: Ctrl + U User

Function: Standard window button

Use: To switch 4-letter rep name without exiting the WireReady software entirely.

Pro: A manager can login as a AE to correct a pitch that was logged incorrectly.

Con: This button cannot be used to switch between secure logins (with passwords); only switches between 4-letter rep names.

Recommended Users: The AE Director/ Team Leader

Button Name: View Record

Function: Standard window button

Use: To open or view any particular account window. This same function is more commonly performed by double-clicking the account name.

Button Name: Delete Record

Function: Configurable (grayed out if disabled) for added security

Use: To delete an entire account from the database.

Pro: To clean out any extraneous records that were added.

Con: We recommend NOT deleting records for several reasons.

1. Deleting a record that has been called upon erases sales history and alters reports
2. Deleting records interferes with yearly database updates provided by WireReady. It is possible to end up with that account again anyway when the database is updated if you have deleted it in the past.

Recommended Users: The AE Director/ Team Leader or Sales Manager ONLY

Button Name: Event Info

Function: Standard window button

Use: To organize, plan and schedule events in the system in an easy-to-use interface. Managers can also add new events at this location. Not only does this window help keep a manager on top of his/her duties, it can be used as a communication tool between AE's and their manager because of the color-coding that indicates when an event is selling and when it is airing.

Managers can also take notes in the Event Info window about events, for their own use, or take notes to be used in communication with AEs.

Button Name: List

Function: Standard window button

Use: To allow users to create a list of accounts to be printed or saved to a file. For calling lists, mailing labels and on-screen information capture. You may export the information from the database either to file or directly to printer.

Recommended Users: Any AE or Sales Manager

Sales Entry Window

To get to the Sales Entry Window, you must first view an account record by double-clicking the account name or clicking the **View Record** button.

Button Name: Schedule

Function: Standard window button

Use: To schedule meetings or negotiations (track sales leads). This is typically used by an account executive, rather than a telesales rep. If an account executive spends just a few minutes per day entering their negotiations, a sales manager can quickly review the deals happening and help facilitate a sale.

Recommended Users: Account Executives

Button Name: Chng Schedule 3

Function: Standard window button

Use: To update records of negotiations or change the pitch on a previously schedule negotiation. This is a way to track the on-going communications/ relationship between the salesperson and the client.

Recommended Users: Account Executives

Button Name: Print

Function: Standard window button

Use: To print one account's information, event history, notes or old calls. AEs can print out this information to take with them on the street.

Recommended Users: Account Executives

Button Name: Change Pitch

Function: Standard window button

Use: To update a previous Undecided pitch to Yes or No. The goal is to follow up on all those Undecided calls and persuade the client to go one way or the other. No money should be left on the table at the end of the month.

Button Name: Delete Pitch

Function: Configurable (no button at all if disabled) for added security

Use: To delete a pitch (usually a mistake or a client changed decision)

Pro: The manager can remove pitches that were entered incorrectly, or sales pitches that were not real sales, from the history of that account.

Con: Access to this button will allow the user to delete any pitch. This could be used to delete real pitches or sales and affect the records of activity on an account or by a AE.

Recommended Users: The Sales Manager ONLY

Button Name: Event Info (first explained above)

Function: Standard window button

Use: To organize, plan and schedule events in the system in an easy-to-use interface. Managers can also add new events at this location. Not only does this window help keep a manager on top of his/her duties, it can be used as a communication tool between AE's and their manager because of the color-coding that indicates when an event is selling and when it is airing. Managers can also take notes in the Event Info window about events, for their own use, or take notes to be used in communication with AEs.

Button Name: Evt Materials

Function: Standard window button

Use: To access event documents such as ad copy forms, broadcast order-forms, faxable brochures/flyers, invoices or any other document that might be needed when finished or negotiating a sale.

Button Name: Contracts

Function: Standard window button

Use: To launch production forms, contracts or event forms

Recommended Users: Account Executives

Button Name: Contact Info

Function: Standard window button

Use: To view account address and email address information

Button Name: Stats

Function: Standard window button

Use: To access sales history information about that account. Lists (in a summary bulleted list): total number of calls, total number of pitches, total number of buys, close ratio, max \$Y pitch, min \$Y pitch, total \$ bought, \$ earned/ call, total busy attempts, total not in attempts, total answering machine attempts.

Recommended Users: The Sales Manager

Button Name: Email

Function: Standard window button

Use: To send customer contact information to a selected email recipient. User simply clicks the email address to where he/she wishes to send email to, and chooses the destination folder.

Button Name: Open Notes

Function: Standard window button

Use: To view account notes written by anyone who has happened to call on this account. Any complicated issues or preferred ad copy can be stored in notes for future reference.

Button Name: View Old Calls

Function: Standard window button

Use: To view sales history past the calls that fit into the sales history window that is already visible. This holds all the past calls that don't fit into the window. Sales History helps when figuring target categories or businesses for a particular event. If the customer has purchased or not purchased similar types of events in the past, it could affect whether this customer is called when time is crunched.

Button Name: Record

Function: Standard window button

Use: To open a blank *.wav file for recording audio over the phone or through a microphone. Customized commercials or interviews can be conducted through the telephone and recorded from SalesReady. This is the same as using the "Record g" button from the main WireReady32 button bar.

Button Name: Start Call

Function: Standard window button

Use: To open the auto-dialing window and start the call timer. Autodialing saves wear on the AE and initiates a call timer for tracking the outcomes of calls.

Button Name: End Call

Function: Standard window button

Use: To stop the call timer after the Start Call button has been used.

Button Name: New Pitch

Function: Standard window button

Use: To open call log window. The New Pitch window is the launch pad for everything a AE might log as the result of a call—the event pitched, the buy, the dollar amount, set a callback, take notes, and open event materials.

Button Name: Done

Function: Standard window button

Use: To finish/ save work on a particular account and let the software officially close the account. **Even when no changes are made, the Done button needs to be clicked.**

Button Name: Cancel

Function: Standard window button

Use: To exit an account without saving any changes. This button should only be used when changes have been made that the user is sure does not need to be saved. When closing an account, it is best to use the Done button.

Button Name: Help

Function: Standard window button

Use: To open the help website. The Help buttons are not supported at this time.

Button Name: Change (town or category)

Function: Standard window button

Use: To change the sort specification associated with a particular account. If a business category or town location changes, the user can update that label with the Change button. This button will be used to assign a category or town when first adding new records.

Recommended Users: The Sales Manager

Button Name: Protect 1 (Phone Number)

Function: Standard window button

Use: To block a phone number from regular use by labeling it with Do Not Call, Bad Number, or Protect.

Pro: Blocking a number prevents AEs from calling on that customer. Software should be configured so that everyone can see the blocked accounts but cannot access them.

Con: As long as they AE can view the account (with no access), he/she will not try to add it back into the database.

Recommended Users: The Sales Manager

Button Name: Change (callback date)

Function: Standard window button

Use: To change the callback date/time set for that account.

Pro: When a callback has been set, and a AE makes an attempt to follow up, only to find the decision maker is still not available, he/she may wish to simply change the callback date for further into the future. After a call back to the account has occurred, this button can be used to clear the call back date and time.

Button Name: Protect 2 (Fax Number)

Function: Standard window button

Use: To block a fax phone number from regular use by labeling it with Do Not Call, Bad Number, or Protect.

Pro: Blocking a number prevents AEs from faxing that customer. Software should be configured so that everyone can see the blocked accounts but cannot access them.

Con: As long as they AE can view the account (with no access), he/she will not try to add it back into the database.

Recommended Users: The Sales Manager

Event Materials Window

To get to the Event Materials Window, you must first view an account record by double-clicking the account name or clicking the **View Record** button. For ease of use, you can find the **Event Materials** button in 2 different places. From the Sales Entry window, there is an Event Materials button, and also in the New Pitch window there is an Event Materials button. The most common way to get to Event Materials is through the New Pitch window.

Button Name: Launch

Function: Standard window button

Use: To open an event materials document (brochure, invoice, etc) so that it auto-grabs the contact information and event information for the customer and event you choose. This technology utilizes WireReady tags embedded into template event materials documents. Each time the template is Launched for a particular customer, it is customized automatically to save AE time. The AEs name is automatically entered as a salutation; there are very few edits the AE must perform before sending out the document.

Button Name: Cancel

Function: Standard window button

Use: To close the Event Materials window without opening any documents.

Button Name: New File

Function: Standard window button

Use: To insert a new blank document into an existing event folder. When creating an entirely new document, this button ensures that the document rests in a location where it can be found easily using SalesReady software.

Recommended Users: The Sales Manager

Button Name: Edit Selected

Function: Configurable (grayed out if disabled) for added security

Use: To edit or make permanent changes to the event document template.

Pro: Each time an event is sold each year, the template usually needs to be edited to reflect changed dates or updated ad copy. NOTE: If you are using the starter pack of events provided by WireReady, titles and event packaging does not need to be altered on the document template because it is housed in the Event INFO Screen instead.

Con: The user must be careful not to accidentally delete an entire WireReady tag or part of a WireReady tag, otherwise the requested information will not auto-fill correctly when the document is launched by a AE. Documents cannot be edited if they don't exist to begin with.

Recommended Users: The Sales Manager

Button Name: Help

Function: Standard window button

Use: To open the help website. The Help buttons are not supported at this time.

Button Name: Event Info 1

Function: Standard window button

Use: To organize, plan and schedule events in the system in an easy-to-use interface. Managers can also add new events at this location. Not only does this window help keep a manager on top of his/her duties, it can be used as a communication tool between AE's and their manager because of the color-coding that indicates when an event is selling and when it is airing.

Managers can also take notes in the Event Info window about events, for their own use, or take notes to be used in communication with AEs.

Button Name: View Notes

Function: Standard window button

Use: To view notes edited by a manager about a particular event. Notes can be used to remember how an event performed from one year to the next. Notes can also be used to inform callers of extra information that would be helpful in making a sale.

Button Name: Edit Notes

Function: Configurable (grayed out if disabled) for added security

Use: To edit/add notes about a particular event.

Pro: Notes can be saved to remember how an event performed from one year to the next. Notes can also be saved to inform callers of extra information that would be helpful in making a sale.

Con: A user could change the information in this field, and assign the good accounts to himself, or remove notes the management added about the event.

Recommended Users: The Sales Manager

Button Name: Launch As Form

Function: Standard window button

Use: To open an event materials document (brochure, invoice, etc) so that it inserts blank lines where it normally would have auto-grabbed the contact information. This "blank" document can then be photocopied to be used as template hard copy.

Button Name: Copy As Template

Function: Standard window button

Use: To copy an event materials document (brochure, invoice, etc) template to another event folder.

Pro: When you add a new event, and you have a master template saved, or just have another event document that would be similar to what you want for your new event, use the Copy Template as a starting point. Copy the similar template to the new folder, and then make just a few edits to the new document instead of starting from scratch.

Con: You cannot copy a document to a new folder if that folder does not already exist. See the handbook to learn how to add a new event folder each time a new event is added to the system.

Recommended Users: The Sales Manager

Button Name: Print ALL as Form

Function: Standard window button

Use: To print all the event materials documents (brochure, invoice, etc) in a particular folder so that it inserts blank lines where it normally would have auto-grabbed the contact information on each document printed from the folder. This would be most often utilized to gain hard copy of all documents to work with for any event. If you need a copy of one or two documents, print each document separately.

Button Name: Print ALL Folders as Form

Function: Configurable (no button at all if disabled) for added security

Use: To print all the event materials documents (brochure, invoice, etc) in all of the event folders so that it inserts blank lines where it normally would have auto-grabbed the contact information on each document printed from the folders.

Pro: The "blank" documents can then be photocopied to be used as template hard copies.

Con: It takes time for the computer and printer to “spool” all the information associated with all the documents (especially because they have color graphics on them). When using this feature, the computer cannot be used for anything else until it is done spooling.

Recommended Users: The Sales Manager ONLY