



Business Development Start Up Guide

WHAT IS CRM LOGIC?

ACCESSING YOUR ACCOUNT

USING THE SYSTEM

Dashboard

Calendar

Leads

Calls / Dialer

Events

Meetings, Tasks & Notes

Reports

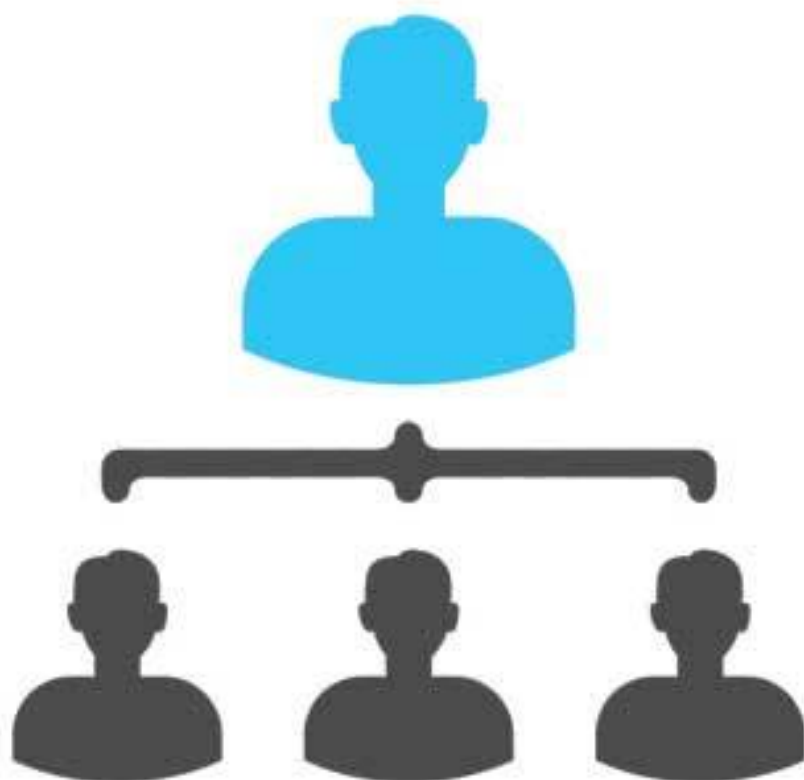
ACTIONS VS. STATUSES

SUPPORT & DEMONSTRATIONS



CRM Logic is a lead management system that can be utilized by any sales organization.

Allows Business Development (BD) teams to track and market to potential referral partners.



By using CRM Logic, BD's can prospect and determine who to prioritize in that process.



ACCESSING YOUR ACCOUNT

To access your account go to www.crmlogic.io

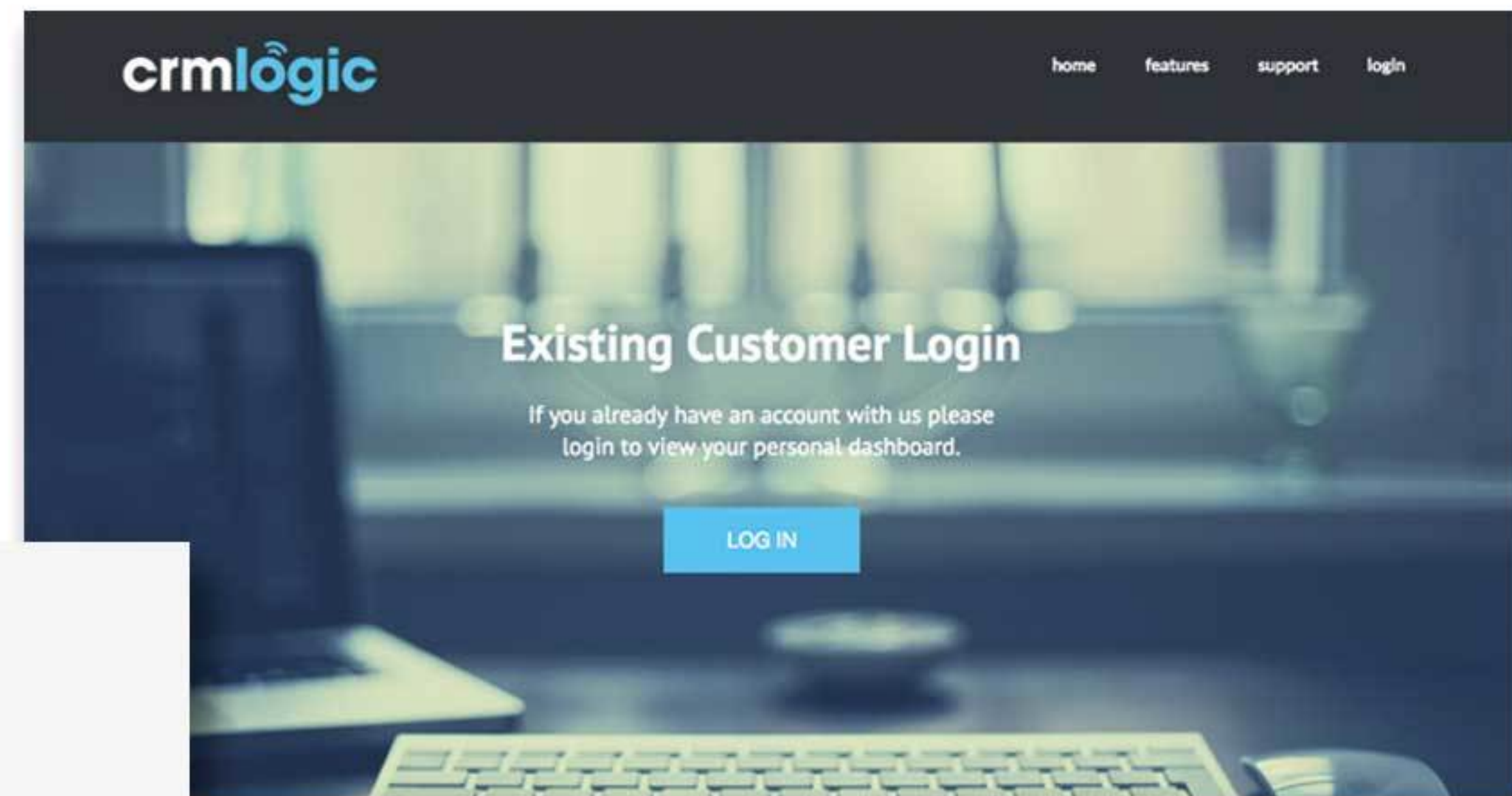
A screenshot of the CRM Logic login form. It features the "crmlogic" logo at the top. Below the logo are two input fields: "User Name" and "Password". Each field has a small icon of a person and a lock respectively. At the bottom of the form is a red "LOG IN" button.

crmlogic

User Name

Password

LOG IN



Use the credentials provided to log into your account.

If you do not have credentials please have your supervisor email us at info@crmlogic.io



Return to the dashboard

Your dashboard gives you a quick overview of all of your activity. Quickly view recently added Leads and Notes or look to see if you have upcoming Calls, Meetings or Tasks

Quick Create

Quickly create ACTIONS: New Leads, Events, Tasks & Meetings.

Upcoming Calls

View Calls that have been scheduled to take place in the next 30 days.

Upcoming Meetings

View Meetings that have been scheduled to take place in the next 30 days.

Open Tasks

View personal Tasks or Tasks assigned by an administrator.

New Leads

Find Leads that have been created or assigned to you in the past 30 days.

Recently Viewed

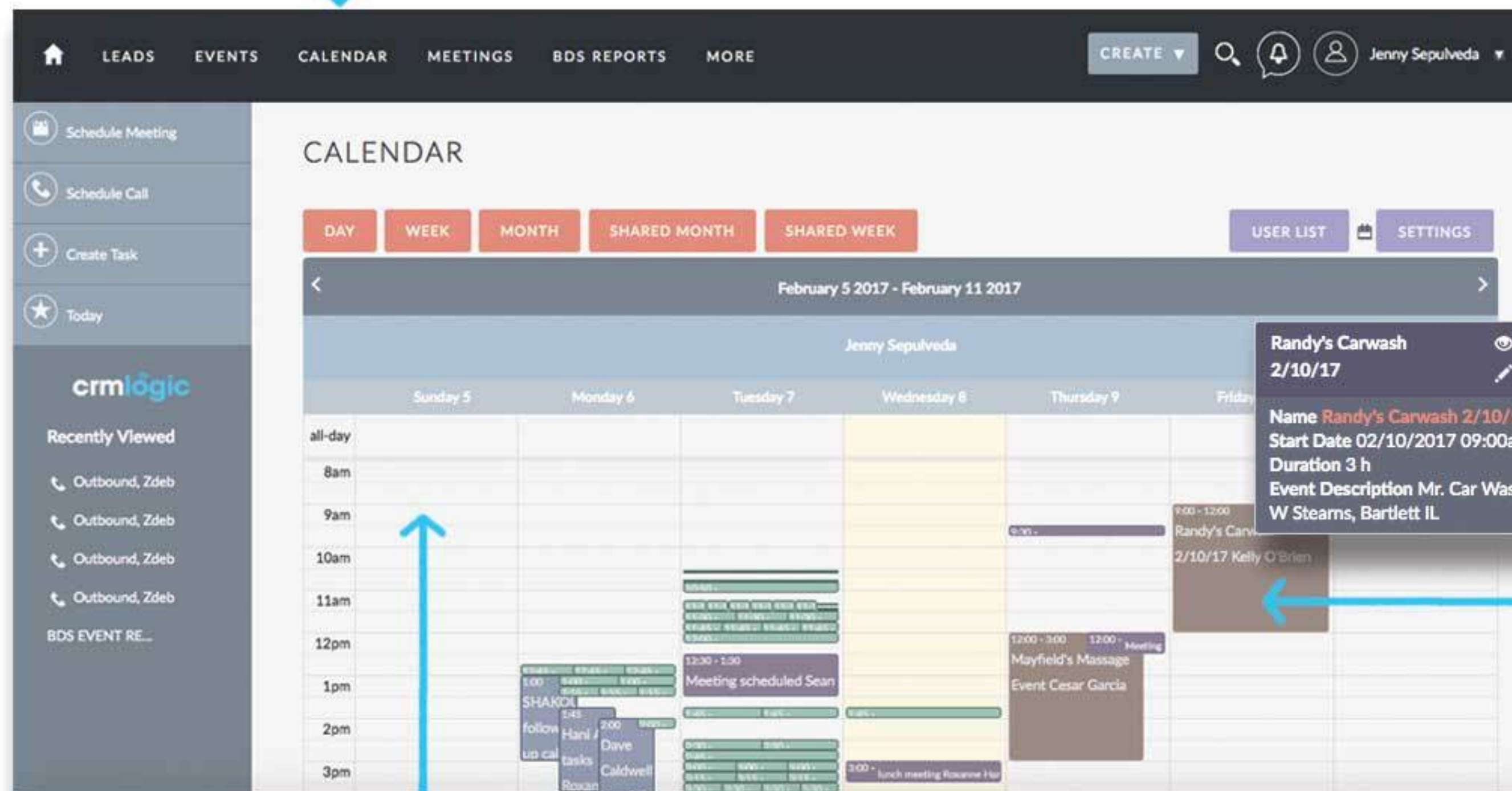
Find items that you have recently visited.

The screenshot shows the CRM dashboard with the following sections:

- Recently Viewed:** A list of recently visited items, including "Outbound, Zdeb" and "BDS EVENT RE..."
- New Leads:** A table showing new leads with columns: Name, Status, Date Created, and Type of Partner. Data includes Karla Thomas (New lead), Mike Rosenhahn (Attended Event), Ryan Lambesis (Prospect), Nicholas Farnsworth (Prospect), Carol Walsh Rosentreter (New lead), and Kim Yaney (Prospect).
- Open Tasks:** A section for viewing personal tasks or tasks assigned by an administrator.
- Upcoming Calls:** A table showing upcoming calls with columns: Subject, Related to, Start Date, and Status. Data includes "Call Evelyn Fred" and "Call Shannon".
- Upcoming Meetings:** A table showing upcoming meetings with columns: Subject, Related to, Start Date, and Status. Data includes "Call her back", "Meeting-coffee", and "Meeting scheduled".

Using the Calendar

Your Calendar allows you to see all of your scheduled Calls, Meetings and Tasks in one easy to use platform.



Edit Actions

Hover over a scheduled item and click on the pencil icon to edit the action.

Create New Actions

Click on an empty time slot to schedule a new Call or Meeting.

Viewing Your Leads

In the Leads tab you will be able to view and sort your leads based on Status, VP, Date Modified, etc...

Create & Import Leads

Add an individual Leads or import multiple leads at once using the Create and Import tools.

Mass Update

Click on the check boxes to select individual Leads or click on the top check box to select all Leads. Then click on "Delete" or the triangle to export, merge and more.

Search Leads

Use the search box to find specific Leads. Remember to clear out the search box and hit enter to view all of your Leads again after searching.

Filter Options

Click on the title in each column to filter by individual categories.

The screenshot displays the CRM Logic Leads Overview interface. At the top, there's a navigation bar with tabs for LEADS, EVENTS, CALENDAR, MEETINGS, BDS REPORTS, and MORE. A 'CREATE' button and a search icon are also visible. On the left sidebar, there are options to 'Create Lead', 'Create Lead From vCard', 'View Leads', and 'Import Leads'. Below these are 'Recently Viewed' items and a 'BDS DELEGATE' section. The main area is titled 'SEARCH LEADS' and contains a search bar, a 'My Favorites' section, and a table of leads. A context menu is open over the table, showing options: 'Email', 'Mass Update', 'Merge', 'Generate Letter', 'Export', and 'Map'. The table has columns: Status, VP, Email, Date Modified, and User. The first row shows a lead for 'Joan Schnobelen' with status 'Invited to Event' and VP 'Mark Mayfield'.

The screenshot displays the CRM system's lead profile page. At the top, there is an 'ACTIONS' dropdown menu. Below it is the 'OVERVIEW' tab. The lead's information is organized into two columns: 'First Name: Jim', 'Last Name: Thomas', 'Email Address: jimthomas@gmail.com (Primary)', 'Personal Email Address', 'Status: Prospect', 'Office Phone: 555.555.5555', 'Company Name', 'Other Phone', and 'Mobile'. To the right of the phone numbers are icons for a phone and a speech bubble. Three modal windows are overlaid on the page: 'SMS Conversation' (bottom left), 'Outbound Call Ready' (bottom center), and 'Outbound Call Dialed' (bottom right). Each modal window has a title bar, a status indicator, a 'Select Source to Call' section with a radio button for 'From Browser', a 'Note' field, and a 'Call' or 'End Call' button.

First Name: Jim **Last Name:** Thomas

Email Address: jimthomas@gmail.com (Primary) **Personal Email Address**

Status: Prospect **Office Phone:** 555.555.5555

Company Name: **Other Phone:** **Mobile:**

SMS Conversation

Outbound Call

Ready

Select Source to Call

• ☒ From Browser

Note:

SAVE

End Call

Outbound Call

Dialed

Select Source to Call

• ☒ From Browser

Note:

SAVE

End Call

Calls & SMS Messages

Click on the icons next to a Leads phone number to start a Call or SMS text message.

Making a Call

Select "From Browser" and click "Call". Once on the call you can add notes that will automatically be added to the Leads history.

NOTE:

Once a call is made it is automatically logged in the history of the Lead.

Filling Out Information

Fill out all of the required fields including Name, Date, Time, etc... In the description box you can add html mark up if you wish.

It's important to make sure that all information is filled out. Anything that you put in this section will be emailed directly to your invitees.

The screenshot shows the 'CREATE' event form in CRM Logic. The form includes fields for Name, Start Date, End Date, Duration, Event Description, Location, Budget, and VP. A blue arrow points from the 'Filling Out Information' text to the Event Description field. Below the main form is an 'EMAIL INVITE' section with a dropdown for 'Event Invite Template' and a text field for 'Accept Redirect URL'. A blue arrow points from the 'Use Email Templates' text to the 'Event Invite Template' dropdown. A preview window titled 'Test Event 1' is open, showing a sample email invite with fields for DATE & TIME, LOCATION, and a description. The preview window also shows 'guaranteedRate' and 'Jenny Sepulveda'.

Use Email Templates

Make sure to select an email template so that your invitees receive an aesthetically pleasing email invite. If you're using Eventbrite you can swap out the Accept Redirect URL with the Eventbrite event page instead.

Selecting Delegates

Once your event is created you can invite guests by clicking on the “Select Delegates” link.

Event Details:

- Name: Car Wash
- Location: Pearl Car Wash
- Start Date: 02/01/2017 10:00am
- End Date: 02/01/2017 12:00pm
- Duration: 2h 0m
- Budget: 150.00
- Event Description: We will have coffee and donuts for agents as they wait for their car to be washed. Event took place at Pearl Auto Spa at 3049 W. Irving Park Road in Chicago. 10 attended, all previous referral partners of Joe. He does NOT want me contacting any of them for meetings. The individuals whom attended were all sent thank you. As far as the price breakdown goes, costs depended on the size of the car. Cars cost \$12, larger vehicles cost around \$15.
- VP: Joe Burke
- Assigned to: Sean Zdob

Attendees List:

Name	Company Name	Email	Office Phone	Status	Accept Status	Action
Elayne		elayne.weinberg@cbexchange.com		Invited	No Response	EDIT
Rick Sobin		rsobin@atproperties.com	7734720200	Invited	No Response	EDIT
Alex Stepien		alex.stepien@gmail.com		Invited	No Response	EDIT

Sending Invites

Use the select all check box and then click the down arrow to expand the menu then click on “Send Invites”. Attendees statuses will automatically update based on their responses. You can update them manually in this menu as well.

Lead Search:

- First Name: [Text Field]
- Last Name: [Text Field]
- Any Email: [Text Field]
- Company Name: [Text Field]
- Type of Partner: [Dropdown Menu]
- Status: [Dropdown Menu]
- Assigned to: [Dropdown Menu]
- Buttons: SEARCH, CLEAR, SELECT

Lead List:

Name	Company Name	Status	Type of Partner	User
Mike Galsbly	Keller Williams Realty West	Invited to Event		Cesar Garcia
Kate McLaughlin	Laura McCarthy-Town & Country	Invited to Event		Cesar Garcia
Sam Taddock	Diemann Sotheby's Int Realty	Invited to Event		Cesar Garcia
Gina Burley	Gladys Marion	Invited to Event		Cesar Garcia
Mary Beth Bell	Coldwell Banker Gundaker	Invited to Event		Cesar Garcia
Steven Brennan	Prudential Alliance	Invited to Event		Cesar Garcia
Christina Strait	Strait Realty	Invited to Event		Cesar Garcia
Liz Fender	Paradigm Realty	Invited to Event		Cesar Garcia

Adding Leads as Delegates

Click on “Leads” and then use the check-boxes to select all of the Leads that you wish to invite to your event. Make sure to save your selections by clicking the “Select” button in red.

Creating Meetings, Tasks & Notes

Create and schedule Meetings, Tasks & Notes by filling out the required fields. Your actions will be updated in the Leads history as well as your dashboard.

The image displays three overlapping screenshots of the CRM system's 'CREATE' form, illustrating the fields for Meetings, Tasks, and Notes. Blue arrows point from the 'NOTE:' section to specific fields in the forms:

- Meeting Form (Left):** Shows fields for Subject, Start Date, End Date, Duration, Location, VP, Related to, Reminders, and Description. A blue arrow points from the 'NOTE:' section to the 'VP' field.
- Task Form (Bottom):** Shows fields for Subject, Start Date, Due Date, Priority, Status, Leads, VP Name, and Description. A blue arrow points from the 'NOTE:' section to the 'VP Name' field.
- Note Form (Right):** Shows fields for VP, Subject, Attachment, and Note. A blue arrow points from the 'NOTE:' section to the 'VP' field.

NOTE:

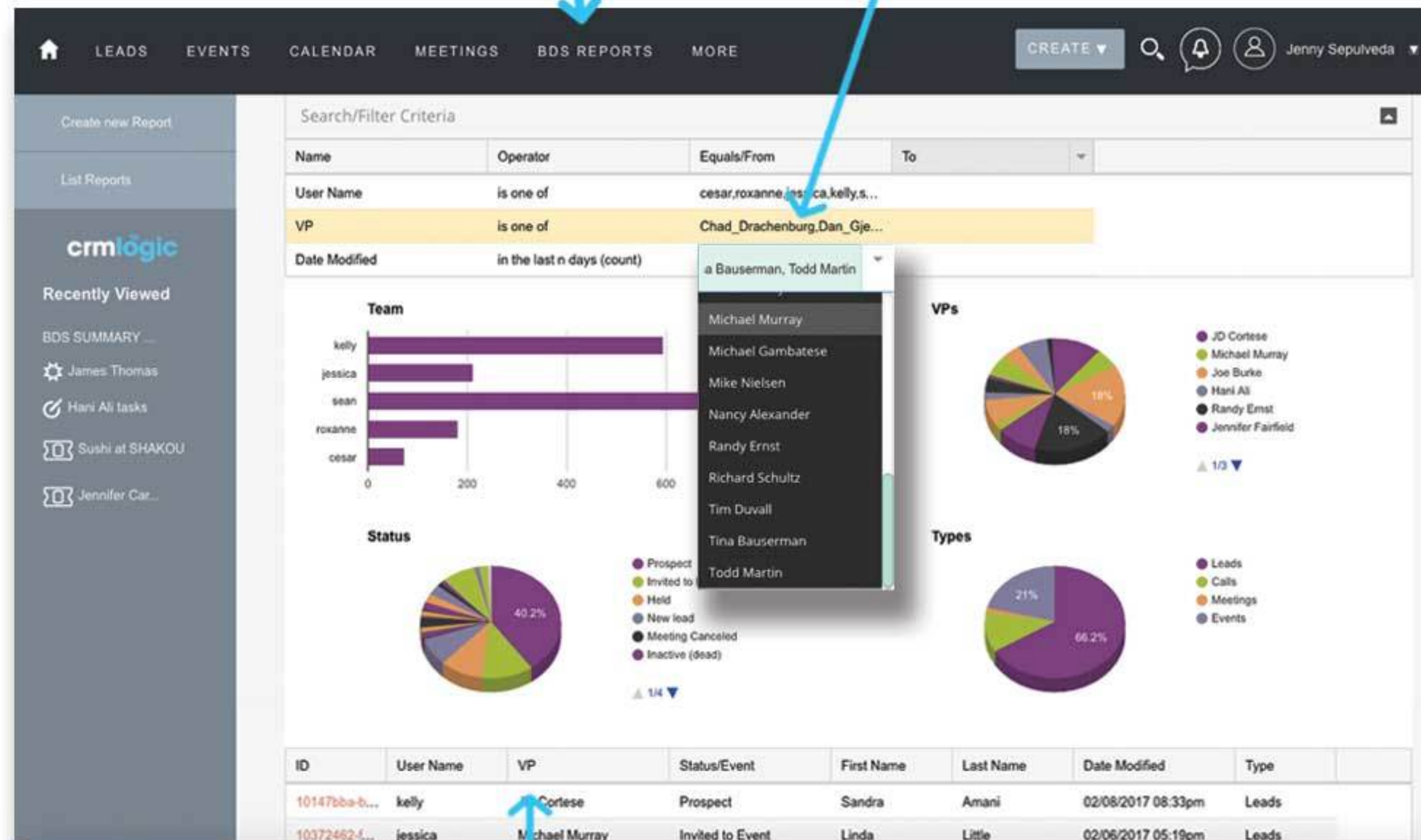
Make sure to include your VP and the Lead that the action is related to in order to get proper reporting.

BDS REPORTS

Track your progress using the BDS Reporting tool.

FILTER BY VP

Select individual VP's from the drop down menu to narrow down your results.



SORTING

You can also sort your results by clicking on the category title.

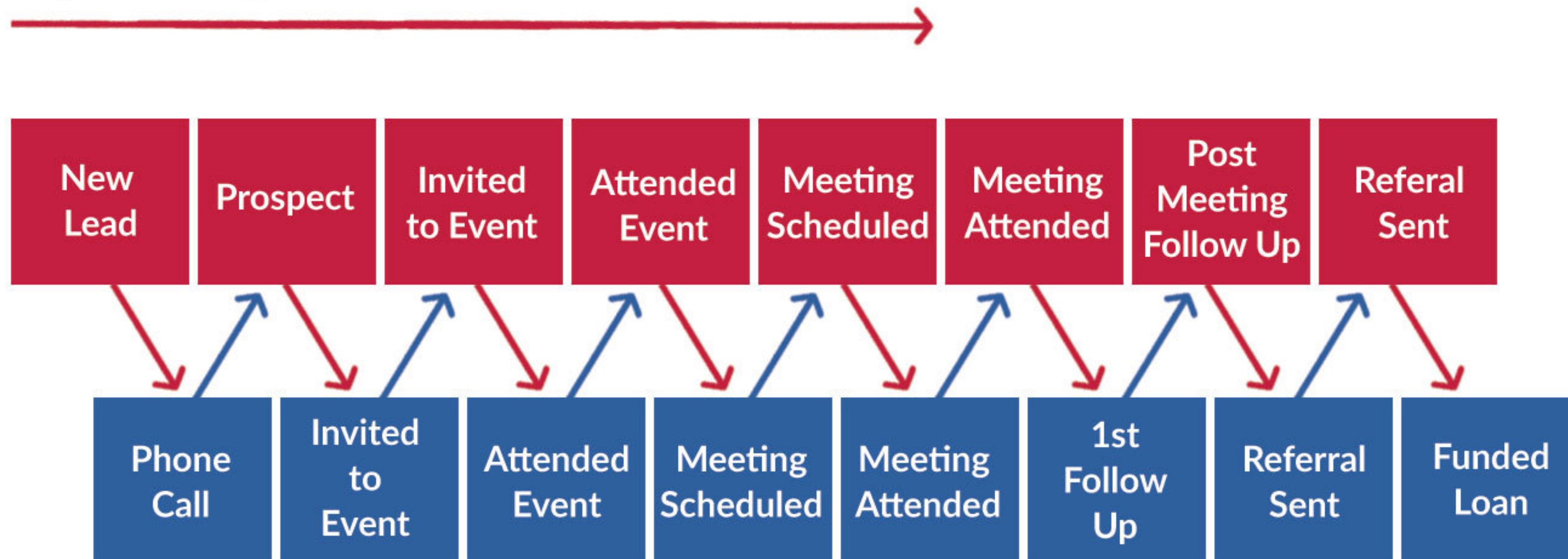
Creating Actions

Your daily obligations such as Calls, Meetings, Tasks, Notes, Etc... are all considered Actions. Logging all of your activities will ensure that you have accurate reporting.

Updating Statuses

After each Action you will want to update the Leads Status to reflect the accurate step in the sales work flow. This will allow you to track your progress on developing a Lead.

Updating Statuses



Creating Actions



USING THE SYSTEM

Support & Demonstrations

We're Here to Help!

Have a question about using CRM Logic? Simply fill out a support ticket on our website at www.crmlogic.io/support and one of our support specialists will get back to you right away! Or email us at info@crmlogic.io

A screenshot of the CRM Logic support page. The header includes the CRM Logic logo and navigation links for home, features, and support. A blue banner below the header reads "FILL OUT A SUPPORT TICKET BELOW OR SEND US AN EMAIL: INFO@CRMLOGIC.IO". The main content area contains four sections: "WHAT IS FREE SUPPORT?", "WHAT IS DEDICATED SUPPORT?", "WHY SHOULD I TAKE SUPPORT?", and "WHAT TYPE OF SERVICE CAN I EXPECT?". Each section has a brief description of the support service.

WHAT IS FREE SUPPORT?

As valued customers our email support line is always open to you for assistance in using your CRM Logic account. Please fill out a support ticket below and one of our representatives will return your inquiry within 24 hours.

WHAT IS DEDICATED SUPPORT?

Dedicated support issues are all dealt directly with the CRM Logic support team. It is specifically designed for users who need a quicker and more robust fault support system. All support issues are dealt with in accordance with specific Service Level Agreements for each account and in some instances telephone support is provided.

WHY SHOULD I TAKE SUPPORT?

A dedicated support package gives you the peace of mind that your system will be maintained and supported by the maintainers of the CRM software. Our packages also provide you with clear time-scales for response and fixes for your users and your business.

WHAT TYPE OF SERVICE CAN I EXPECT?

A screenshot of the CRM Logic support ticket form. The form is titled "Fill out a support ticket." and includes a sub-header: "Please fill out a support ticket to the right and one of our representatives will return your inquiry within 24 hours." The form fields are: "Name *" (text input), "Email *" (text input), and "Support issue *" (text area). A blue "SUBMIT" button is located at the bottom right of the form.

Fill out a support ticket.

Please fill out a support ticket to the right and one of our representatives will return your inquiry within 24 hours.

Name *

Email *

Support issue *

SUBMIT

Live Demonstrations

If you'd like to schedule a live demonstration of the system please email us at info@crmlogic.io.