

Quick Start Guide

CRM Financial Machine

If you need assistance or find an error in this guide, or if you'd like to suggest an addition to this guide, just post a Trouble Ticket at www.LMRHELP.com

This guide assumes that Templates are installed in the software (when running a trial, the Templates and Contracts are not installed). Contact support to get your Templates installed.

Our goal is your complete satisfaction.

Thank you.

LMR International, Inc.
Support Team

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REGISTERING CRM FINANCIAL MACHINE

When you open the software you will see the Menu Screen.

If you are under a trial, simply click ENTER



And then CONTINUE.

A registration screen for first-time users. At the top, it says "First time users just click CONTINUE". Below this is a horizontal line. Underneath the line is the label "User Password:" followed by a text input field containing six black dots. At the bottom of the screen are three buttons: "Cancel", "PIN REGISTRATION", and "CONTINUE". The "CONTINUE" button is highlighted in blue.

If you are a client and you had received a Registration PIN then after clicking ENTER click the PIN REGISTRATION button and you will be taken to the registration screen.

REGISTRATION FORM

 Help
  Back

During your trial period you should not have to register.
 If you are still within your trial period, please hit back now, and use the button labeled "Enter" to access the program.

Version (0.) 01-31-2012-1 AAA-BBB-CCC 135529981 Key:

After you have purchased / leased our software, you will receive your registration PIN.

* Full Name:

* Company Name:

* Your Email:

* Your Phone:

* PIN Number:

To register your software enter the data in the fields above and click the RED button.

1

CLICK HERE TO REGISTER. THE
PASSWORD WILL BE
RETRIEVED AUTOMATICALLY.
DO NOT NEED TO WAIT JUST
ENTER THE PROGRAM
NORMALLY

PASSWORD

To contact support go to www.LMRHELP.com by clicking here

Enter all requested information fields and click the RED button. Note that you need to be connected to the Internet to retrieve the password.

Once you click the RED button you will receive a confirmation at the right side of your screen and you can proceed inside the program. You DON'T have to wait to receive the password that will be done later automatically.

ENTERING BASIC COMPANY INFORMATION

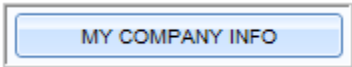
When you install the software for the first time, before being directed to the main screen, you will be displayed a section where you have to enter your company's basic data.

In the event that you have several companies to use in the software, you can go to SETUP.

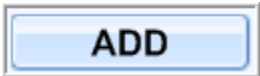
Directly click the Setup icon at the upper part of the software



Once in the Setup, click the MY COMPANY INFO button.



In the Company Information section, click the ADD button at the right side of the screen.

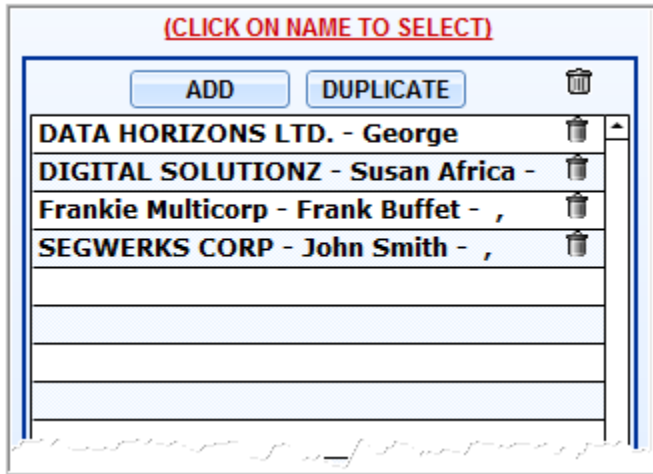


At the center of the screen are company data fields where you have to enter the information about the company.

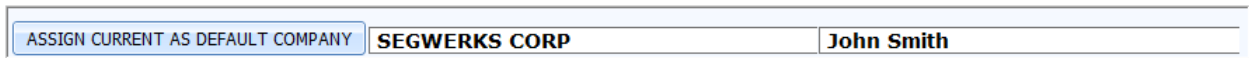
SELECTING DEFAULT COMPANY

From your list of companies in the software, you can have only company to be selected as default. This means that the selected company will be the one that will be used in some parts of the software where a company data is needed.

To assign a company, select from the list of companies at the right side of the screen.



Once a company is selected, the name of the selected company will reflect in the field as shown in the figure below.



Notice the button beside the field. To assign the company reflected in the field, just click the ASSIGN CURRENT AS DEFAULT COMPANY button.

ENTERING BASIC AGENT INFORMATION

To enter basic agent information in the software, go to SETUP. Directly click the Setup icon at the upper part of the software



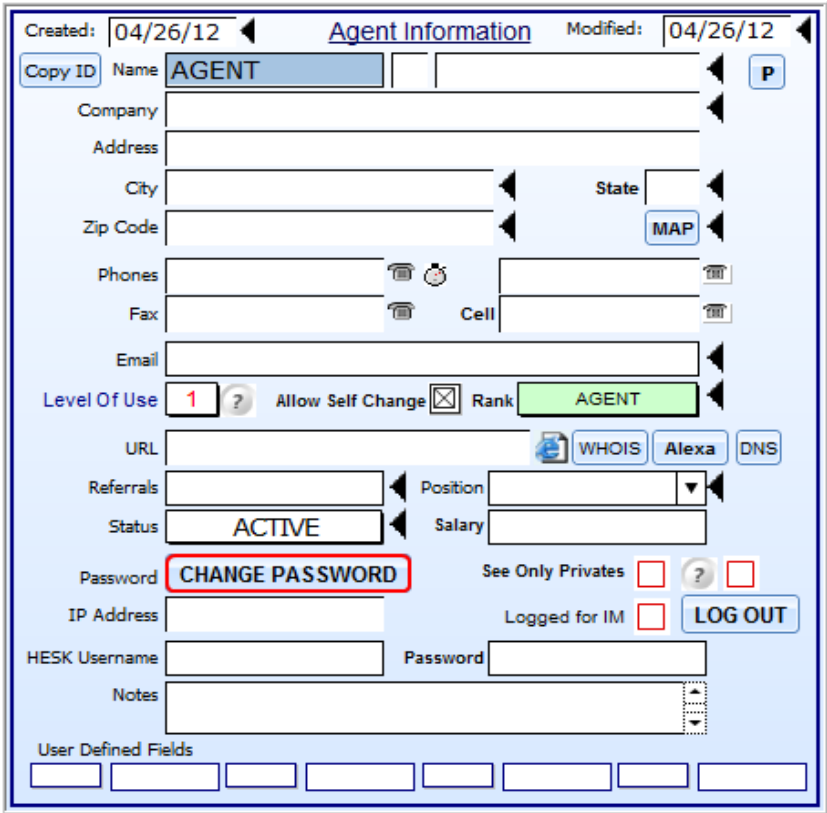
Once in the Setup, click the AGENT PRIVILEGES button.



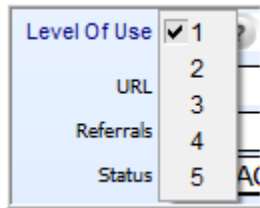
Click the Add button to add an agent.



Then, fill in the basic data of the agent in the provided section as shown in the figure below.

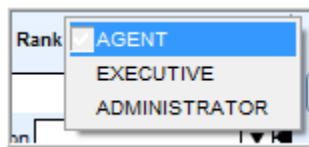


One of the most important data to fill in this section about the agent is the level of use. The level determines what level the agent can only access in the software.



A screenshot of a dropdown menu titled "Level Of Use". The menu is open, showing a list of options: 1 (checked), 2, 3, 4, and 5. To the left of the menu, the text "URL", "Referrals", and "Status" is visible, suggesting these are related fields.

Also indicate the RANK of the agent in using the software. There are three ranks provided with the Administrator being the highest rank.



A screenshot of a dropdown menu titled "Rank". The menu is open, showing three options: AGENT (checked), EXECUTIVE, and ADMINISTRATOR.

REQUEST PAYMENT



A screenshot of a form titled "REQUEST PAYMENT". The form has two main sections. The first section contains two dropdown menus: "Company" and "E-mail". The second section contains a "Currency" dropdown menu set to "USD" and a "Payments by" dropdown menu set to "PayPal".

In the case where the agent requests payment, you can use this area of the Agent Privileges. You can do this if the agent requests for payment through PayPal.

Enter in the Company field the company that you want the agent to see when receiving the payment. Also, enter in the Email field your email that you have in PayPal.

ALLOWED FIELDS

To control the agent's access to certain agent information fields in the software, check mark the check box of the fields that you don't want the agent to access.

Agent Selected: AGENT		DON'T ALLOW TO ENTER IN: <input type="checkbox"/> C <input type="checkbox"/> S	
-----NOT-----			
FIELDS	EMPTY	MODIFY	MODIFY (unless empty)
First Name	<input type="checkbox"/> C <input type="checkbox"/> S	<input type="checkbox"/> C <input type="checkbox"/> S	<input type="checkbox"/> C <input type="checkbox"/> S
Last Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Company Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Address	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
City	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
State	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Zip Code	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Country	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Phone 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Phone 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	Enter	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	Add	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	Modify	<input type="checkbox"/>	<input type="checkbox"/>
Contact-Email	Delete	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Agenda		<input type="checkbox"/>	<input type="checkbox"/>
Advertising Center		<input type="checkbox"/>	<input type="checkbox"/>
Agent Metrics		<input type="checkbox"/>	<input type="checkbox"/>
CC Analyzer		<input type="checkbox"/>	<input type="checkbox"/>
Checks		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Credit Repair		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Data Analysis		<input type="checkbox"/>	<input type="checkbox"/>
Debt Settlement		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Domains Manager		<input checked="" type="checkbox"/>	<input type="checkbox"/>

CLIENTS AND PROSPECTS

ADDING A NEW CLIENT

To add a new client (or contact) just click the Plus Icon at the top left of the Main Screen.

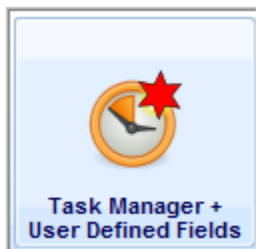


Enter the basic information for this client such as its name, address, phone number, etc.

The screenshot shows a software interface for entering client information. The form is titled 'Basic Information' and contains the following fields and values:

- Name: Portia McFann
- Company: Beachcomber Realty
- Address: 4891 Pacific Highway
- City: San Diego
- State: CA
- Zip Code: 92210
- Time Zone: [empty]
- Home: (858) 294-0653
- Office: [empty]
- Fax: (858) 294-0651
- Cell: [empty]
- E-mails: portia@mcfann.com
- Templates: NONE SELECTED
- URL: http://www.portamcfann.com
- Commission: 0%
- Tag as a Salesperson or Affiliate: [checkbox]

To enter his Social Security and Date of Birth (D.O.B.), click the Task Manager + User Defined Fields button from the main screen.



The User Defined Fields area will open in the center of the screen and then you can enter the Social Security and D.O.B. in User Defined Fields number 10 and 14.

TEXT Undo User Defined Fields

UDF 01
UDF 02
UDF 03
UDF 04
UDF 05
UDF 06
UDF 07
UDF 08
UDF 09
UDF 10

NUMBER (Click To get Totals & Averages for Selected Records)

UDF 11 + T= 0 A= 0.0
UDF 12 + T= 0 A= 0.0
UDF 13 + T= 0 A= 0.0
Total =

DATE

Age: UDF 14
UDF 15

Twitter ID:

Picture

Be sure to format the Social Security in the way you want to appear in letters. The format of date should be entered like 01/01/1960 (4 or 2 digits for the year).

Notice that when you enter the D.O.B. you can see the useful for small talk. The AGE is automatically entered in the Age field once you enter a date on the D.O.B. field.

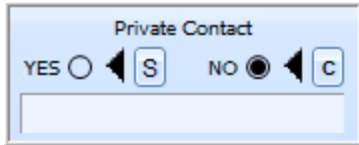
DATE

Age: **36** UDF 14 03/23/75
UDF 15

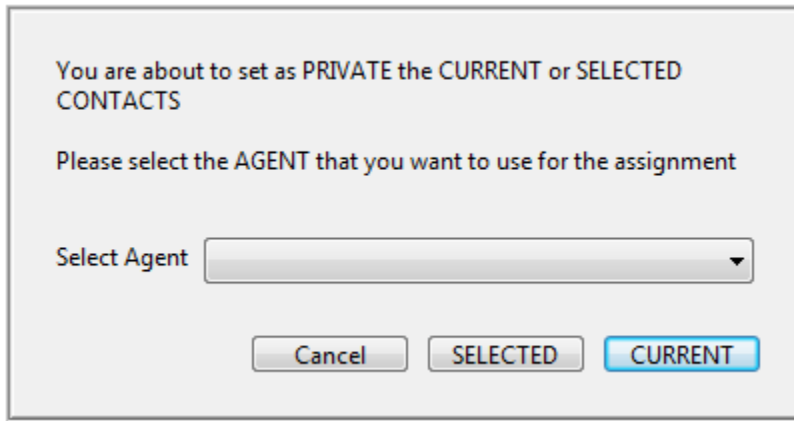
SET AS PRIVATE CONTACT

In order to set a contact to be **PRIVATE**, there is a section in the Basic Information area where you can do it. Setting a contact private means it can be only viewed by the particular agent where it is assigned.

In the Private Section, click the S button



Select the agent to be assigned for the current contact



FINDING CLIENTS (QUICK FIND)

To find clients from the whole database or selected database of clients, click on the Find button.



A windows dialog will then pop up where you can enter the query of information on the client/s you want to find.

A dialog box with a light gray background and a thin border. At the top, it contains the text: "Quick Find and From Selected searches in First Name, Last Name, Company , Phone Numbers, Keywords, Product Codes, URL, Referrals, Related to, State, E-mail, Keywords and Contact ID". Below this text is a dropdown menu labeled "Previous Search" with a downward arrow. Underneath the dropdown is a text input field labeled "or Type New Search". At the bottom of the dialog, there is a row of six buttons: "Cancel", "Expand", "Omit", "Full Find", "Quick Find from Selected", and "Quick Find". The "Quick Find" button is highlighted with a blue border.

In the search field from the windows dialog, you can enter any query of information for the system to filter. Note that you can enter into the field different query of information at the same time (always put a space in between distinct queries)

Once the query is entered, click Quick Find to search for clients from the database of all clients in the software. Then click the List button to display the result in a list.



The software will then display the search result in the Contacts Selected – Found List screen.

First Name	Last Name	Company Name	TZ	ST	Phone 1	URL	E-mail	Q	Omit	🗑️
Andrew	Fenstermacher	Shafer Commercial Seating Inc	FL		(850) 584-7434	http://www.andrewfenste	andrew@fenstermacher.co	1	Omit	🗑️
Gracie	Riskalla	Jessup, Richard A Esq	CA		(916) 344-7735	http://www.gracieriskalla	gracie@riskalla.com	1	Omit	🗑️
Shirley	Keams	Transport Workers Un Afl Cio	MA		(508) 228-6114	http://www.shirleykeams	shirley@keams.com	1	Omit	🗑️
Willie	Coughenour	Adams Rib Rstrnt At Norwalk	WV		(304) 422-8589	http://www.williecoughen	willie@coughenour.com	1	Omit	🗑️
Antionette	Shoobridge	Dolfin International	FL		(305) 624-9608	http://www.antionettesh	antionette@shoobridge.co	1	Omit	🗑️
Ann	Senff	Travelodge Santa Barbara Beach	CA		(909) 923-0954	http://www.annsenff.com	ann@senff.com	1	Omit	🗑️
Lauren	Langenbach	Albright, David F Esq	WA		(425) 745-5517	http://www.laurenlangen	lauren@langenbach.com	1	Omit	🗑️
Julia	Cokins	Ati Title Company	GA		(404) 266-1124	http://www.juliacokins.co	julia@cokins.com	1	Omit	🗑️
Ashley	Kilness	Criterium Day Engineers	TX		(972) 416-8588	http://www.ashleykilness	ashley@kilness.com	1	Omit	🗑️
Jules	Kellerhouse	Apt Guid Orng Cnty Long Bch	OH		(937) 294-6534	http://www.juleskellerho	jules@kellerhouse.com	1	Omit	🗑️
Marilyn	Kleine	Alitalia Airlines	NE		(402) 341-8233	http://www.marilynkleine	marilyn@kleine.com	1	Omit	🗑️
Jeromy	Dirksen	Automatic Mach Products Co	CA		(562) 868-3418	http://www.jeromydirkse	jeromy@dirksen.com	1	Omit	🗑️
Abdul	Begum	Hisrich, Thomas H Esq	NY		(718) 522-7615	http://www.abdulbegum.	abdul@begum.com	1	Omit	🗑️
Jamey	Cellar	World Const & Parliament Assn	FL		(850) 434-4388	http://www.jameycellar.c	jamey@cellar.com	1	Omit	🗑️
Alfonso	Canerday	Cirrus Logic Colorado	NJ		(732) 937-8343	http://www.alfonsocaner	alfonso@canerday.com	1	Omit	🗑️
Brooke	Mondelli	Sands Beach Club All Ste Resrt	PA		(717) 741-3987	http://www.brookemond	brooke@mondelli.com	1	Omit	🗑️
Angelica	Berkenbile	B D Holt Co	MD		(410) 252-6645	http://www.angelicaberk	angelica@berkenbile.com	1	Omit	🗑️
Ashley	Coneway	Pearle Vision Express	PA		(610) 354-6047	http://www.ashleyconew	ashley@coneway.com	1	Omit	🗑️
Van	Sprewell	Asia Pacific Technotrade	TX		(915) 593-7646	http://www.vansprewell.c	van@sprewell.com	1	Omit	🗑️
Quinn	Prazak	Am Internl	CA		(916) 363-9562	http://www.quinnprazak.	quinn@prazak.com	1	Omit	🗑️
Antionette	Andree	Syring Wayne Ins Agcy Inc	HI		(808) 488-7186	http://www.antionettean	antionette@andree.com	1	Omit	🗑️
Alfred	Fines	Saurer Txtl Systems Charlotte	MT		(406) 232-7958	http://www.alfredfines.co	alfred@fines.com	1	Omit	🗑️
Nicholas	Engelson	Apollo Glass Co	CO		(303) 499-1368	http://www.nicholasengel	nicholas@engelson.com	1	Omit	🗑️
Alecia	Krance	Lenweaver, Thomas E Esq	PA		(215) 735-0485	http://www.aleciakrance.	alecia@krance.com	1	Omit	🗑️
Ivan	Cimaglia	Surveying And Mapping Inc	CA		(510) 429-4828	http://www.ivancimaglia.	ivan@cimaglia.com	1	Omit	🗑️

DELETING CONTACTS

There are two ways to delete contacts. One is by deleting them one by one using the delete button directly from the main screen.



Another way is by displaying all the contacts in a list first and either delete them one by one or delete them in a group directly from there.

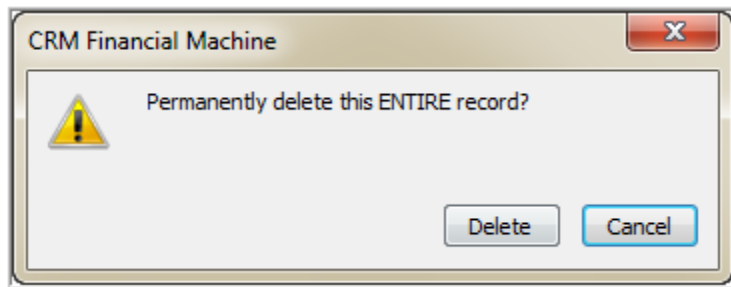
To do this, click the LIST button from the main screen.



DELETING CONTACTS FROM LIST

First Name	Last Name	Company Name	TZ	ST	Phone 1	URL	E-mail	Q	Omit	🗑️
Andrew	Fenstermacher	Shafer Commercial Seating Inc	<input type="checkbox"/>	FL	(850) 584-7434	http://www.andrewfenstermacher.com	andrew@fenstermacher.com	1	Omit	🗑️
Gracie	Riskalla	Jessup, Richard A Esq	<input type="checkbox"/>	CA	(916) 344-7735	http://www.gracieriskalla.com	gracie@riskalla.com	1	Omit	🗑️
Shirley	Keams	Transport Workers Un Afl Clo	<input type="checkbox"/>	MA	(508) 228-6114	http://www.shirleykeams.com	shirley@keams.com	1	Omit	🗑️
Willie	Coughenour	Adams Rib Rstrnt At Norwalk	<input type="checkbox"/>	WV	(304) 422-8589	http://www.williecoughenour.com	willie@coughenour.com	1	Omit	🗑️
Antionette	Shoobridge	Dolfin International	<input type="checkbox"/>	FL	(305) 624-9608	http://www.antionettesh.com	antionette@shoobridge.com	1	Omit	🗑️
Ann	Senff	Travelodge Santa Barbara Beach	<input type="checkbox"/>	CA	(909) 923-0954	http://www.annsenff.com	ann@senff.com	1	Omit	🗑️

To delete contacts from the list **ONE BY ONE**, just click the GARBAGE BIN icon of the contact. Once the icon is clicked, you will be prompted with the windows dialog as shown below.

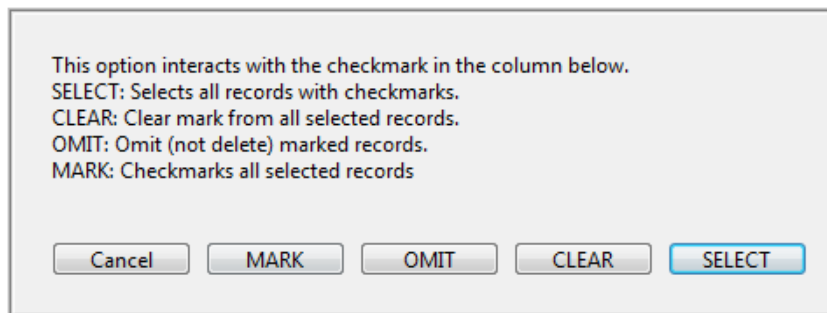


In the case where you don't want this to pop up every time you delete a contact, just click the GARBAGE BIN icon on top of all the same icons on the column.

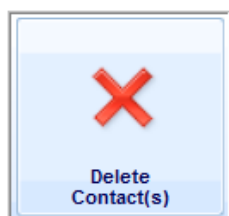


To delete contacts from the list **BY GROUP**, mark the checkbox of the contacts that you want to delete at the same time.

Note To mark all the contacts on the list, click the checkbox with a check from the checkbox column and select MARK.



Once, the group of contacts to be deleted are marked, click the DELETE CONTACTS button.

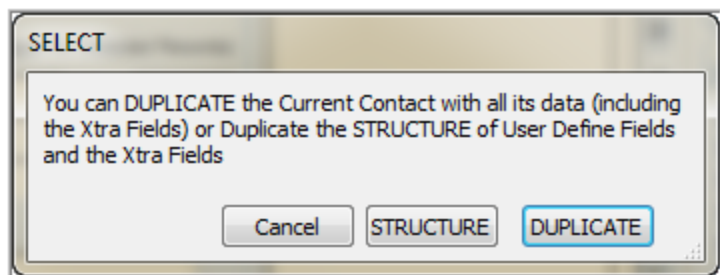


DUPLICATING CONTACTS

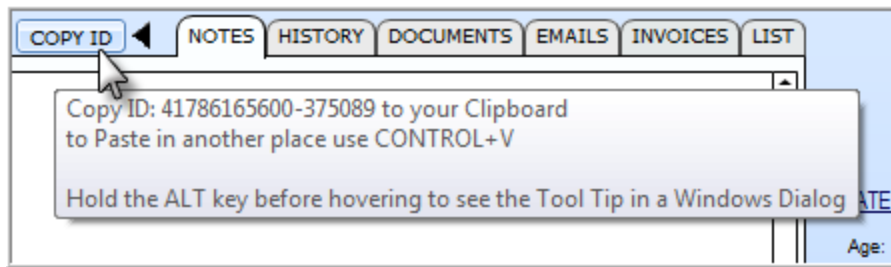
To duplicate the current contact, click the green "honeycomb" icon at the top left of the main screen.



Then select the kind of duplicate that you want from the pop-up windows dialog as shown below.



Note The duplicate contact has a different contact ID to distinguish it from the original one. The Contact ID can be found by **hovering** on the COPY ID button located at the bottom left of the main screen.



ACCOUNT PAYABLES

Account Payables is part of the software where you can control all your payables including recurring payables and create checks to pay for them in one click.

Click the Account Payables button to access this feature. **Note** that when you enter Account Payables, you should already have selected the contact or payor for any payable entry you want to add.



ADDING A PAYABLE

Click Add Payable to add a payable item entry



or the green plus button at the upper left part of the Payable screen.




Enter the description of the entry either in the Private Notes or in the Payment Notes field.

Private Notes	+	S		+	C	S
						
Group / COA						

To include a date in the note, click the green plus button.

+

Then, indicate the AMOUNT and DATE DUE of the payable item entry in the Amount field.

Date Due	Amount
03/17/12	\$0.00
	

Also, indicate the STATUS of the entry for you to determine on what state or condition of the payable item. To do this, click on the Status field and select the status from the drop down list menu.

Status	S	Omit	✓	✓
<input checked="" type="checkbox"/> DUE <input type="checkbox"/> PAID <input type="checkbox"/> VOID <input type="checkbox"/> HOLD <input type="checkbox"/> WAIVE <input type="checkbox"/> CHARGEBACK <input type="checkbox"/> CONSOLIDATED				

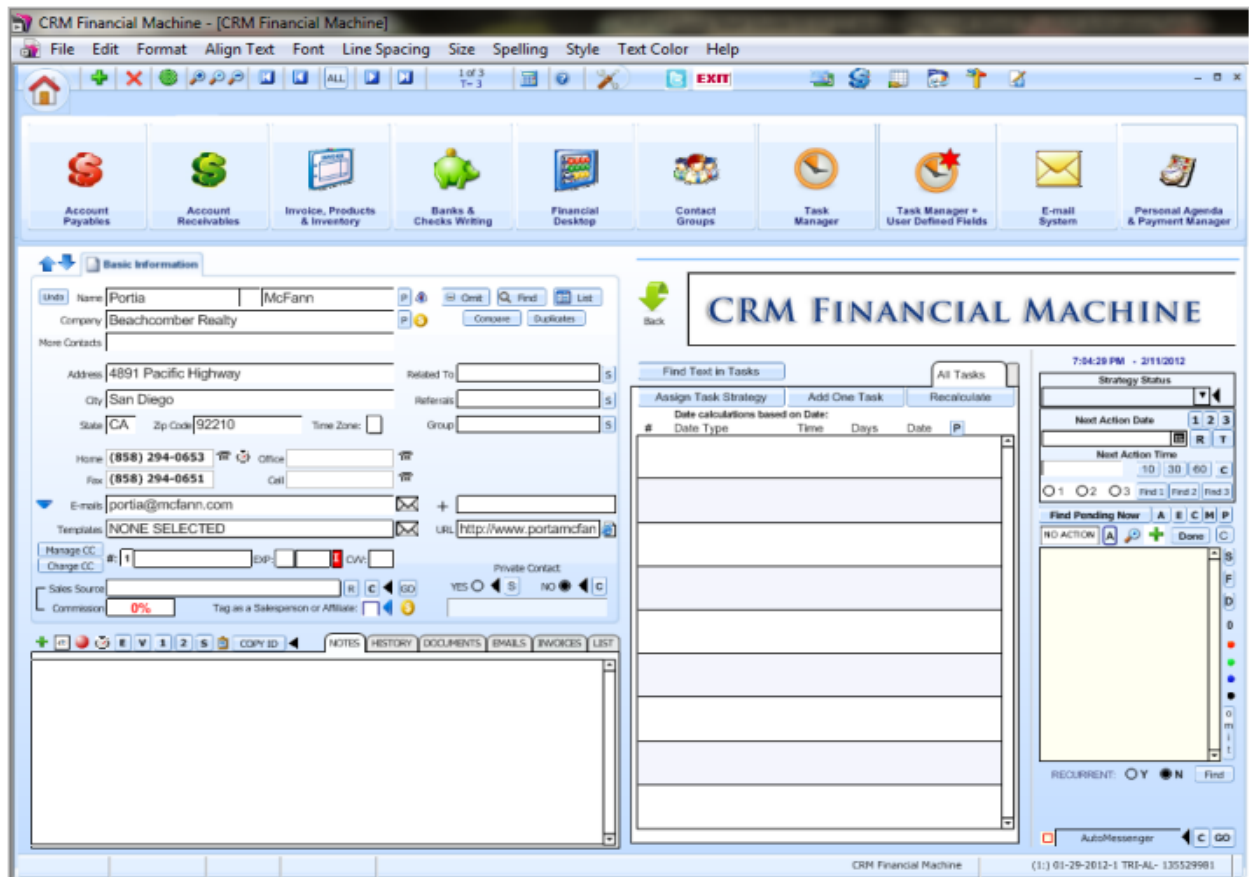
TASK MANAGER

The Task Manager is part of the software where all the tasks for a given contact assigned to a particular agent are managed. It has a special feature where it can assign one or several tasks to other agents as well.

To access the Task Manager, click the Task Manager button from the main screen.



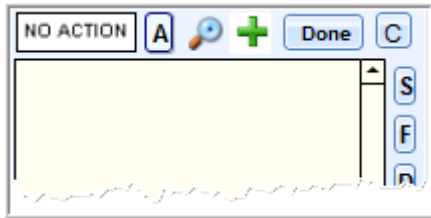
Note that the Task Manager is displayed ON the main screen once accessed without going inside the software.



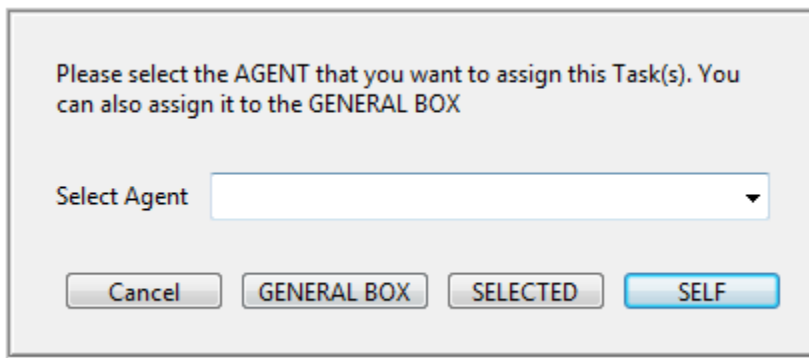
ADDING A TASK

USING THE GREEN PLUS BUTTON

To add a new task, just click the green plus button in the Task Manager area.



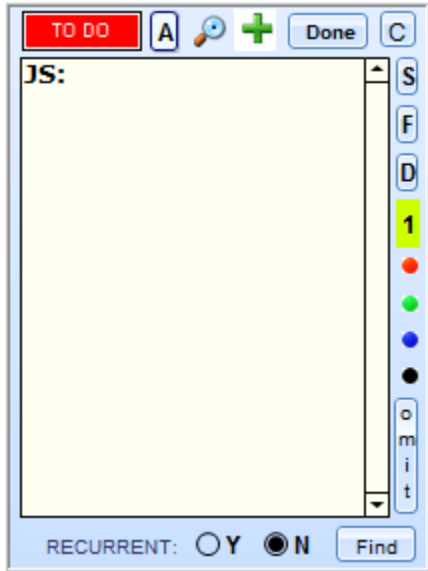
Then select the agent to assign the task.



Note that assigning the task to SELF means assigning it to the currently logged on agent of the software and assigning the task to the GENERAL BOX means assigning it to ALL the agents of the software.

On the other hand, to select other agents, select from the drop down menu and click SELECTED.

Once adding task is successful, the INITIALS of the selected agent are written inside the task box as well as in the task list. In the example, the selected agent is John Smith. Hence, [QUICK START GUIDE FOR CMMPP](#) | **22**

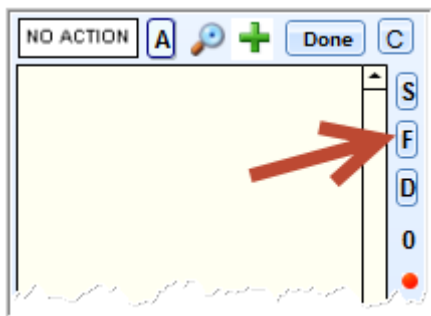


Then click on the task box to write the task with regards to the current contact.

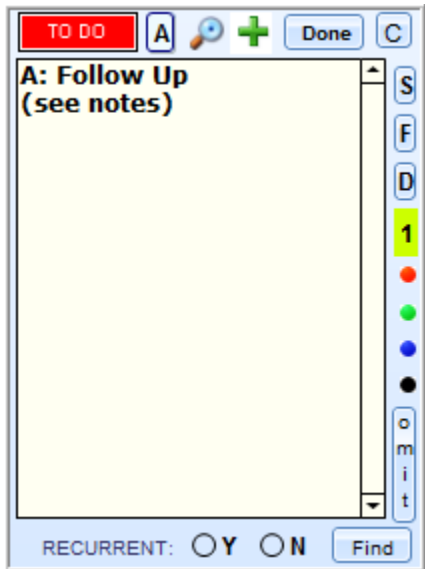
USING THE F BUTTON

The F button stands for FOLLOW UP which is usually used when you have some descriptive notes for the task.

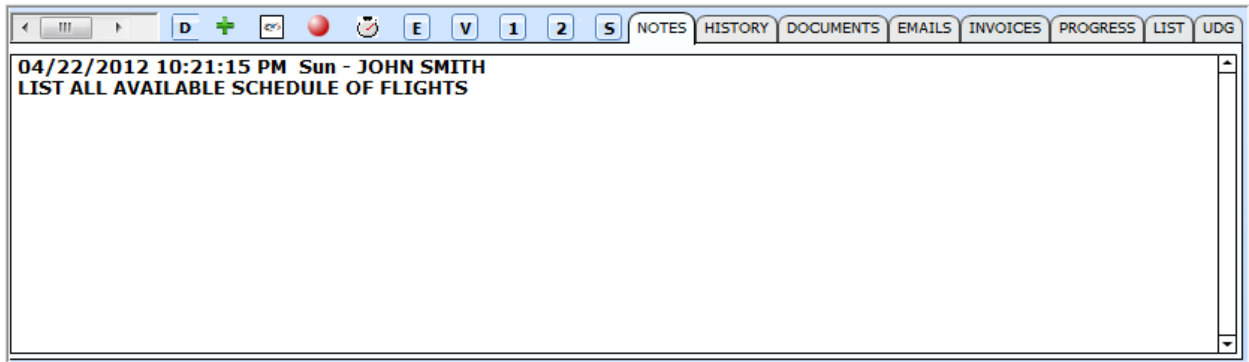
To add a task using this option, click the F button.



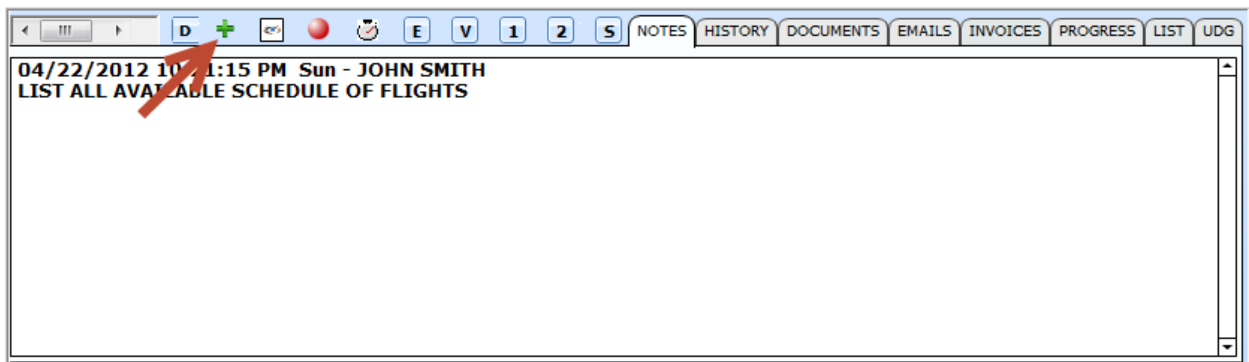
Automatically, the task will be scheduled for TODAY with the default task "Follow Up (See Notes)".



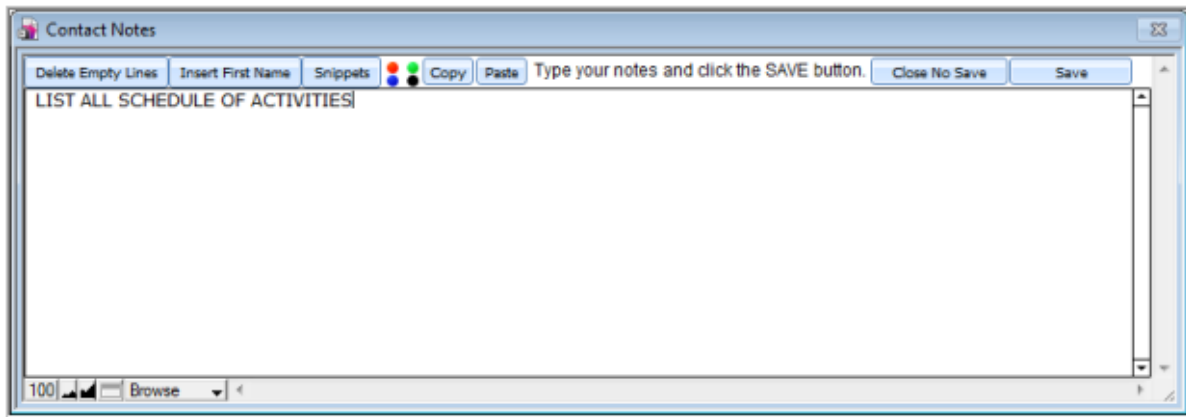
So instead of having to put the task in the task box, you can have it in the Notes area under the current contact's Contact Information Section.



To ADD notes for this client, click the green plus button above the notes text field.



Enter the note in the Notes field and click SAVE.



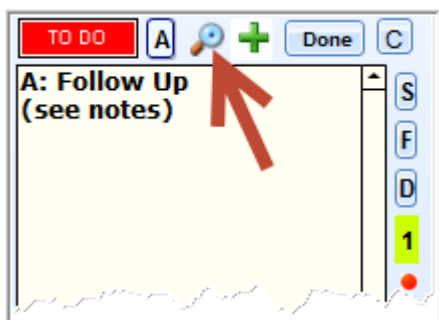
Note that this is a very different approach of creating a personal task just like in PERSONAL AGENDA in a way that using the software's TASK MANAGER, the tasks are created for you to do to the client linked to it.

Also, in principle, you can have several tasks to do to one client for different agents. For instance, a particular client has different issues to each of the agents. Each agent can create a task assigned to him on the particular client and so on. Thus, the Task Manager is provided for the client but is assigned to an agent.

TASK SCHEDULER LIST

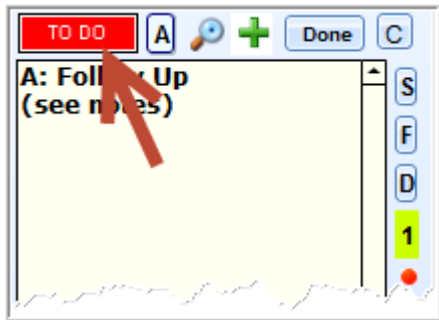
All the task created that is to do to a certain client are displayed in one list called Task Scheduler List. This list is particular to a client with the agents assigned to them.

To open/close the Task Scheduler List, click the magnifying glass icon in the Task Manager.



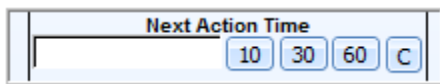
HOW TO RESCHEDULE TASK

Ultimately, when a task is created, it is automatically scheduled to be done the day it was created and is signified by the label TO DO.

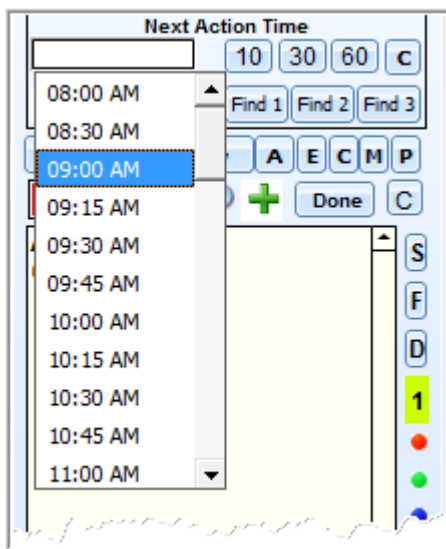


There are several ways to reschedule a task based on the TIME.

- 1) By clicking on the buttons 10, 30, and 60 in the Next Action Time section. The buttons will reschedule the time 10, 30, or 60 minutes after the current time.

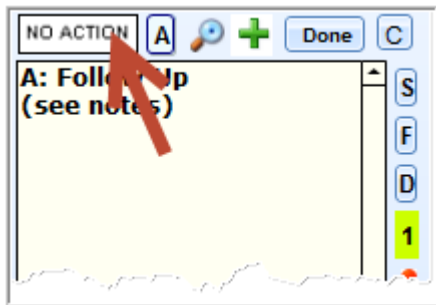


- 2) By clicking on the time field and selecting from the given default time list.

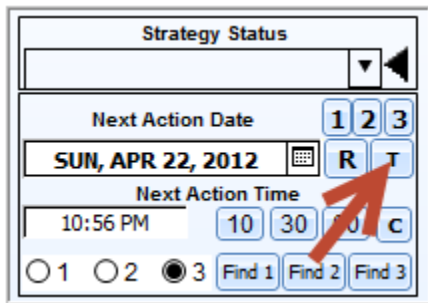


- 3) By manually entering the time based on the software time format HH:MM A.
- 4) By clicking on the buttons 10, 30, and 60 with SHIFT key combination. This will add 10, 30, or 60 minutes to the existing time in the time field.

Note that once the task is rescheduled, the previous TO DO label will then be NO ACTION. After the designated schedule of the task arrives, the task will then go back to its TO DO label.



On the other hand, you can also reschedule the task based on a particular DAY or Month. There are several ways for this using the T button in the Next Action Date section.



- 1) By clicking on the T button directly. This will set the task to be done to TODAY.
- 2) By clicking on the T button with the SHIFT key combination. This will set the task to be done to NEXT DAY.
- 3) By clicking on the T button with the CONTROL key combination. This will set the task to be done to NEXT WEEK.
- 4) By clicking on the T button with the SHIFT + CONTROL keys combination. This will set the task to be done 30 DAYS MORE.
- 5) By clicking on the calendar icon beside the date field and selecting which date to reschedule the task.
- 6) By manually typing into the date field with the format MM/DD/YYYY.

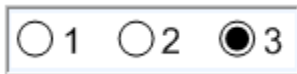
HOW TO SET PRIORITY TO TASKS

Tasks must be set with specific priorities in order to manage the more important tasks from tasks with less important ones.

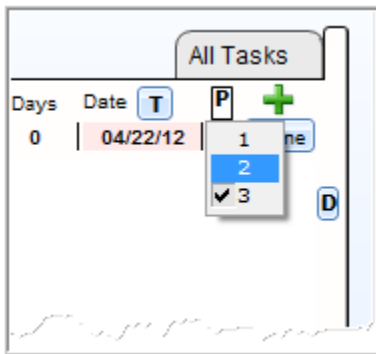
Note that the Task Manager has priorities 1 to 3: 1 having the highest priority and 3 having the lowest. When you create a task for a client, the task manager will set the priority of the task to 3 by default.

There are two ways in which you can set priority to a task.

- 1) By selecting from the radio buttons



- 2) By the drop down priority list in the Task Scheduler List



CHECK TASKS EVERY DESIGNATED MINUTES

In order to be aware of the TASKS WITH PRIORITY ONE AND HAS TIME to be done while doing some other activities in the software, you can have an automatic checking of tasks that will pop up every designated minutes until you have taken into action the task to be done.

For the software to check the tasks for you and at the same time remind you through pop ups, click the Setup icon at the upper part of the main screen and select the Agent Privileges button.



AGENT PRIVILEGES

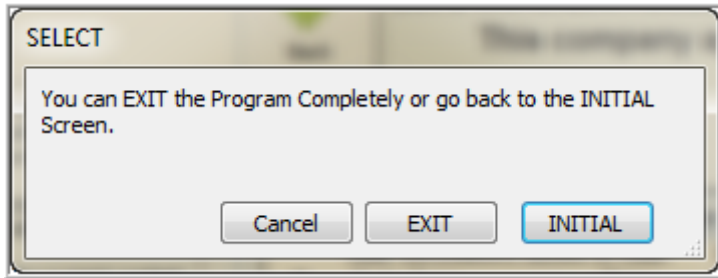
At the bottom left of the Agent Privileges area, there is a CHECK TASKS EVERY column with text field where you have to enter the number of minutes you want the software to check your tasks.

In the case where you want to snooze automatically every 5 minutes and the pop-up will close without any further action, click on the checkbox beside the Check Tasks Every.

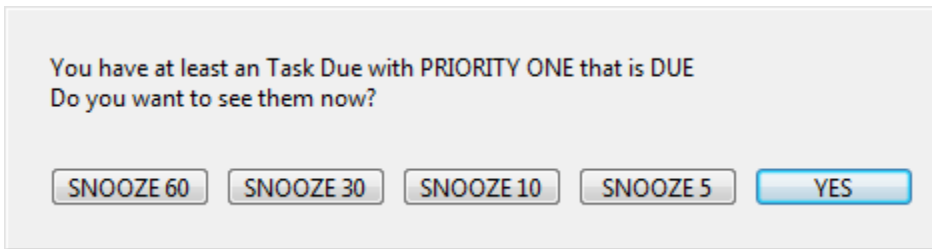
Now once the number of minutes is indicated for the software to check the task, click the Start button.

Note that the event will only start in the next login. Meaning, you have to logout from the software first and login again.

To log out, go back to the main screen and click Exit button and then select INITIAL.



Once the software starts checking tasks on the designated minutes you have provided, every designated minutes the windows dialog as shown below will pop up for reminder.



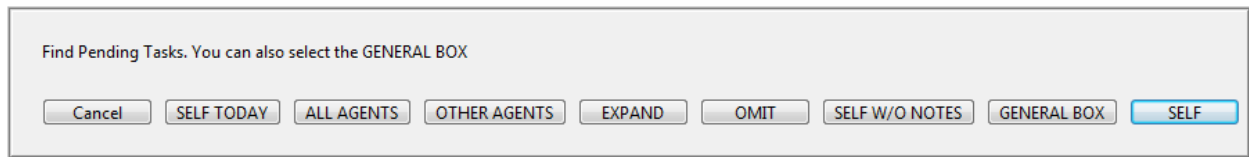
FIND PENDING TASKS

Find Pending Tasks is the same as checking tasks but without having the software do the checking for you in designated minutes. This way you can check the tasks all by yourself in any time you want to do them.

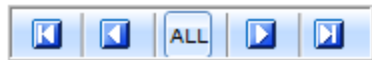
To do this, click the Find Pending Now button.



Then select from whom the tasks you want to find.



The software will then display all the contacts/prospects with tasks of the agent you selected previously and navigate them using the navigation buttons.



Note that the order of Finding Pending Tasks goes by the priority then the date and then the time. This means that if the tasks with the highest priority are first to be displayed.

On the other hand, in the case where all the tasks have the same priority, it will check for the tasks based on who is oldest.

If all the tasks have been created at the same date, it will display by its natural order.

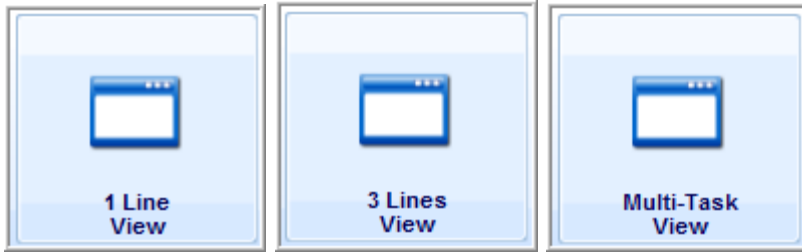
There is also another technique which is to DISPLAY ALL THE FOUND TASKS IN A LIST – by clicking the List button from the main screen.



Although this is not a good technique because it does not directly access the Task List View. Once in the Contacts Selected Found List screen, click the Multiple List View button.



In the Task List View, you can have three different ways to view the tasks by clicking any of these buttons:



In the 1 Line View, the tasks of the agent are displayed all in one line.

The screenshot shows the 'CONTACTS 1 LINE VIEW' interface. At the top, there is a menu bar (File, Edit, View, Insert, Format, Records, Scripts, Window, Help) and a toolbar with various icons. Below the toolbar is a search bar and a 'Sort By: Next Action Date' dropdown. The main area contains a table of contacts with columns for First Name, Last Name, Company, ST, Phone 1, TZ, Email, Next Task Description, and Next Task Date. The table lists 12 contacts, all with 'JS: Follow Up' as their next task. At the bottom, there is a 'NOTES' section with a timestamp '04/22/2012 10:21:15 PM Sun - JOHN SMITH' and a 'LIST ALL AVAILABLE SCHEDULE OF FLIGHTS' button. To the right of the notes is a calendar for April 2012.

First Name	Last Name	Company	ST	Phone 1	TZ	Email	Next Task Description	A	D	A	E	C	M	P	Next Task Date	P	T	Q	Agent Task	Omit	✓	✓	✓	✓
Clark	Strothmann	Dann Ocean Towing	NY	(516) 223-1706		clark@strothm	A: Follow Up	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	04/22/12	3	1		JOHN SMITH	Omit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Portia	Mcfann	Beachcomber Realty	CA	(858) 294-0682		portia@mcfan	JS: Follow Up	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	04/24/12	3	1		JOHN SMITH	Omit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Andrew	Fenstermacher	Shafer Commercial	FL	(850) 584-7434		andrew@fenst	JS: Follow Up	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	04/24/12	3	1		JOHN SMITH	Omit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brady	Tatum	Bohlin, Cywinski	OH	(419) 222-8541		brady@tatum.	JS: Follow Up	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	04/24/12	3	1		JOHN SMITH	Omit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gracie	Riskalla	Jessup, Richard A	CA	(916) 344-7735		gracie@riskall	JS: Follow Up	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	04/24/12	3	1		JOHN SMITH	Omit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Helga	Rio	Pony Express	OK	(580) 357-0385		helga@rio.com	JS: Follow Up	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	04/24/12	3	1		JOHN SMITH	Omit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shirley	Keams	Transport Workers	MA	(508) 228-6114		shirley@keams	JS: Follow Up	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	04/24/12	3	1		JOHN SMITH	Omit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Willie	Coughenour	Adams Rib Rstrmt At	WV	(304) 422-8589		willie@coughe	JS: Follow Up	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	04/24/12	3	1		JOHN SMITH	Omit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lashawn	Maniska	Goldstein, Phillip	KS	(785) 272-6823		leshawn@meri	JS: Follow Up	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	04/24/12	3	1		JOHN SMITH	Omit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Linda	Golda	Parham, J Randolph	MI	(616) 451-2797		linda@golda.c	JS: Follow Up	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	04/24/12	3	1		JOHN SMITH	Omit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tyler	Hendershott	Rappaport Hertz	CA	(916) 349-5439		tyler@henders	JS: Follow Up	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	04/24/12	3	1		JOHN SMITH	Omit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

In the 3 Lines View, the area has much more space for the tasks so you can basically read the tasks in its entirety.

File Edit View Insert Format Records Scripts Window Help

CONTACTS 3 LINE VIEW

Sort By: Next Action Date

Templates: NONE SELECTED

First Name	Last Name	Company	ST	Phone /Cellular	TZ	Next Task	A	D	Tasks	Next Task Date	P	T	Omit
Clark	Strothmann	Dann Ocean Towing Inc 16 Filmore Pl Freeport NY 11520		(516) 223-1706		A: Follow Up (see notes)	<input type="checkbox"/>	<input type="checkbox"/>	1	04/22/12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Portia	Mcfann	Beachcomber Realty 4891 Pacific Hwy San Diego CA 92110		(858) 294-0682		JS: Follow Up (see notes)	<input type="checkbox"/>	<input type="checkbox"/>	1	04/24/12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Andrew	Fenstermacher	Shafer Commercial Seating Inc 2400 N Jefferson St Perry FL 32347		(850) 584-7434		JS: Follow Up (see notes)	<input type="checkbox"/>	<input type="checkbox"/>	1	04/24/12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brady	Tatum	Bohlin, Cywinski Jackson 710 N Cable Rd Lima OH 45805		(419) 222-8541		JS: Follow Up (see notes)	<input type="checkbox"/>	<input type="checkbox"/>	1	04/24/12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gracie	Rekalla	Jessup, Richard A Esq 5345 Madison Ave Sacramento CA 95841		(916) 344-7735		JS: Follow Up (see notes)	<input type="checkbox"/>	<input type="checkbox"/>	1	04/24/12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Helga	Rio	Pony Express 5108 W Gore Blvd Lawton OK 73505		(580) 357-0385		JS: Follow Up (see notes)	<input type="checkbox"/>	<input type="checkbox"/>	1	04/24/12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shirley	Keams	Transport Workers Un Aff Clo 6 N Water St		(508) 228-6114		JS: Follow Up (see notes)	<input type="checkbox"/>	<input type="checkbox"/>	1	04/24/12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

04/22/2012 10:21:15 PM Sun - JOHN SMITH
LIST ALL AVAILABLE SCHEDULE OF FLIGHTS

2012 Apr

Sun	Mon	Tue	Wed	Thu	Fri	Sat
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					

by clicking on a date in the calendar, you will select records that have actions pending for that date or before. Use Shift to select ONLY that date.

In the Multi-Task view, the area gives more emphasis on the tasks containing important fields relevant to contact, assigned agent, and tasks.

MULTI-TASK VIEW

Sort By: Next Action Date

Name	Company	Assigned Agent	Date	Type	Days	Task Date	Time	P	Task Description
Clark Strothmann	Dann Ocean Towing Inc	JOHN SMITH	04/22/12	Fix	0	04/22/12	10:56PM	3	A: Follow Up
Portia Mcfann	Beachcomber Realty	JOHN SMITH	04/24/12	Fix	0	04/24/12		3	JS: Follow Up
Andrew Fenstermacher	Shafer Commercial Seating Inc	JOHN SMITH	04/24/12	Fix	0	04/24/12		3	JS: Follow Up
Brady Tatum	Bohlin, Cywinski Jackson	JOHN SMITH	04/24/12	Fix	0	04/24/12		3	JS: Follow Up
Gracie Riskalla	Jessup, Richard A Esq	JOHN SMITH	04/24/12	Fix	0	04/24/12		3	JS: Follow Up
Helga Rio	Pony Express	JOHN SMITH	04/24/12	Fix	0	04/24/12		3	JS: Follow Up
Shirley Keams	Transport Workers Un Aff Clo	JOHN SMITH	04/24/12	Fix	0	04/24/12		3	JS: Follow Up
Willie Coughenour	Adams Rib Rstrnt At Norwalk	JOHN SMITH	04/24/12	Fix	0	04/24/12		3	JS: Follow Up
Lashawn Mariska	Goldstein, Phillip	JOHN SMITH	04/24/12	Fix	0	04/24/12		3	JS: Follow Up
Linda Golda	Parham, J Randolph Esq	JOHN SMITH	04/24/12	Fix	0	04/24/12		3	JS: Follow Up
Tyler Hendershott	Rappaport Hertz Cherson	JOHN SMITH	04/24/12	Fix	0	04/24/12		3	JS: Follow Up

04/22/2012 10:21:15 PM Sun - JOHN SMITH
LIST ALL AVAILABLE SCHEDULE OF FLIGHTS

2012 T Apr

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					

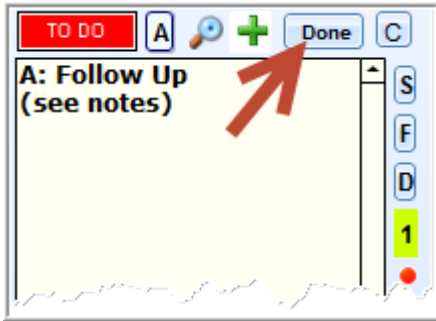
by clicking on a date in the Calendar, you will select records that have actions pending for that date or before. Use Shift to select ONLY that date.

HOW TO DISPOSE TASKS

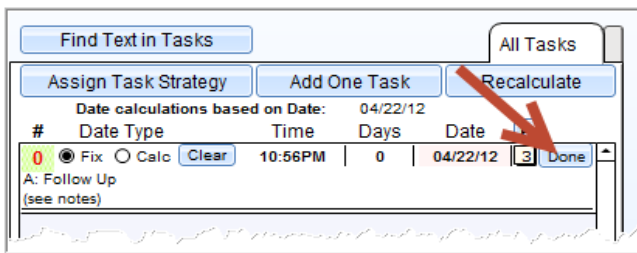
There are several reasons why you want to dispose a task. One of the most basic reasons is if you have already done the task for the client. The same way, you can also have several ways in disposing a task.

Specifically, the software has four ways to dispose the task.

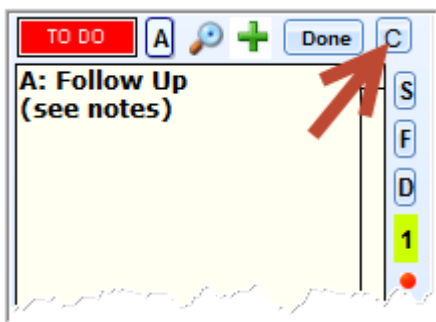
- 1) By clicking the DONE button of the task that is in the Task Box. Usually, the task contained inside the said task box is the task with the highest priority among the others.



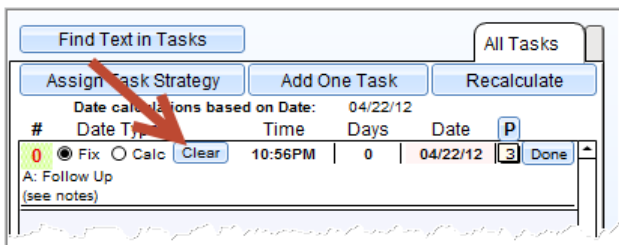
The DONE button can also be found on each of the tasks in the Task Scheduler List where you can directly dispose other tasks that are not in the task box.



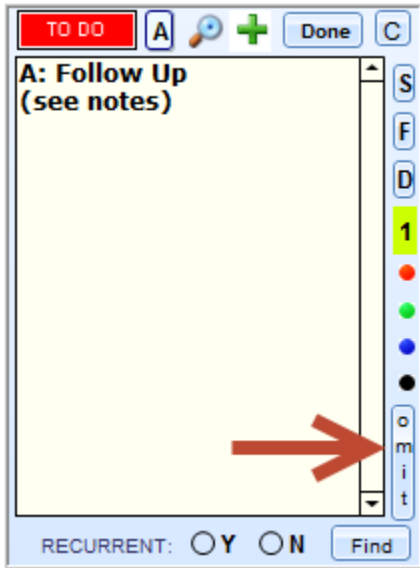
2) By clicking either the C button of the task that is in the Task Box



or the CLEAR button on each task in the Task Scheduler List.



- 3) By clicking the OMIT button of the task that is in the Task Box.



Note that omitting a task doesn't mean the task is deleted from the Task Manager. It only temporarily deletes the task and can be retrieved anytime.

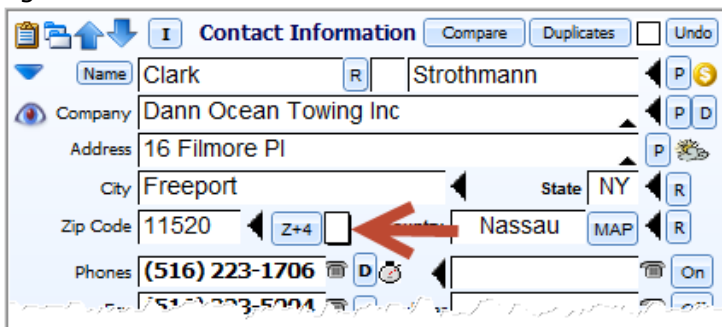
- 4) By rescheduling the task. This way, it is as if you have created a new task by just overwriting the content of the task with the old one.

FINDING AND SELECTING TASKS

There are several ways to find contacts that are designated with tasks to be done by an assigned agent.

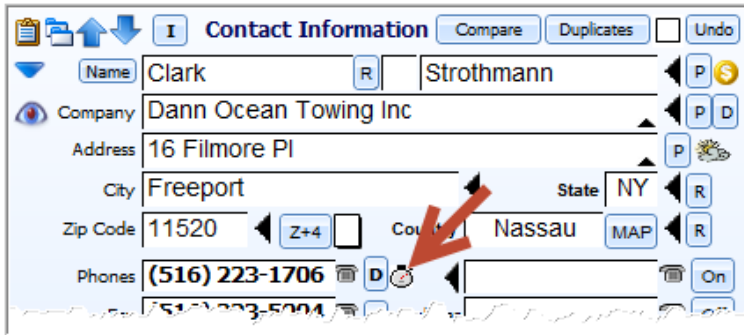
- 1) By finding based on time zones: E (Eastern), C (Central), M (Mountain), P (Pacific)

Note that before using this option; make sure that the client or prospects that agents have tasks for have been set with a time zone on his/her contact information.



If the time zone wasn't provided at the time the client was added in the software, you can click the clock icon to know the time based on the client's phone number area code.

To set the times zones of all the selected contacts at the same time, click the icon with the SHIFT key combination.



Now to find and select contacts with tasks assigned to an agent based on time zone, just select from the E, C, M, or P buttons

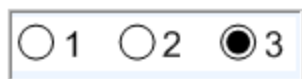


The A button, however is used to find and select all the due and future tasks.

2) By the priority number.

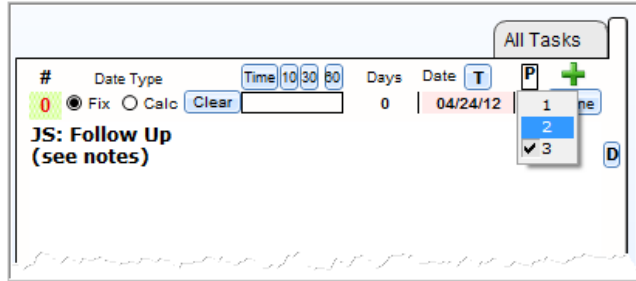
Note that when adding a task, by default, its priority is set to 3. Now to change its priority, you have two ways:

a. By selecting from the radio buttons

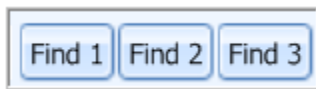


This is the case if you want to change the priority of the task that is in the task box.

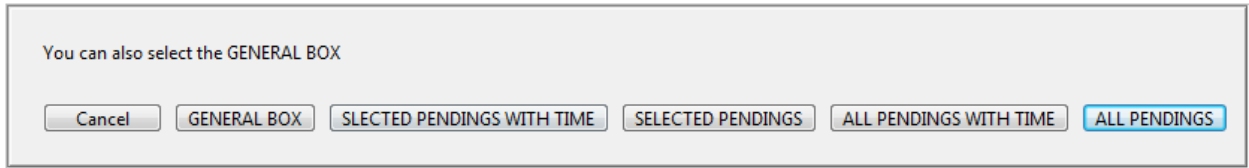
- b. By the drop down priority list in the Task Scheduler List



Now to find and select tasks based on their priority, click from the Find 1, Find 2, or Find 3 buttons.



Then select what kind of tasks

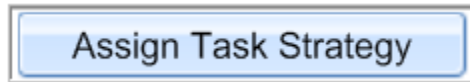


ASSIGNING STRATEGY TASKS

In order to be consistent of assigning tasks for clients; just click on the 'A' button beside the task status label.

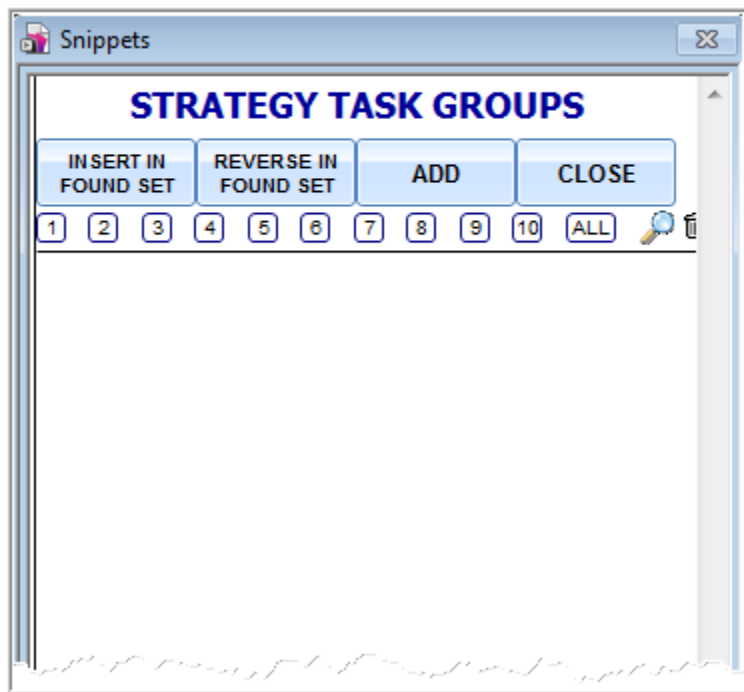


Or the Assign Task Strategy button in the Task Scheduler List

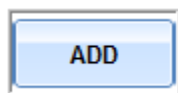


The tasks created using this are called STRATEGY TASKS. Strategy tasks are tasks that are grouped in order to utilize the time of adding tasks one by one. Usually tasks are grouped because they are under the same task category or they are tasks that are related to each other and must be done consecutively.

Now you will be presented a snippet window where you can add the Strategy Tasks.

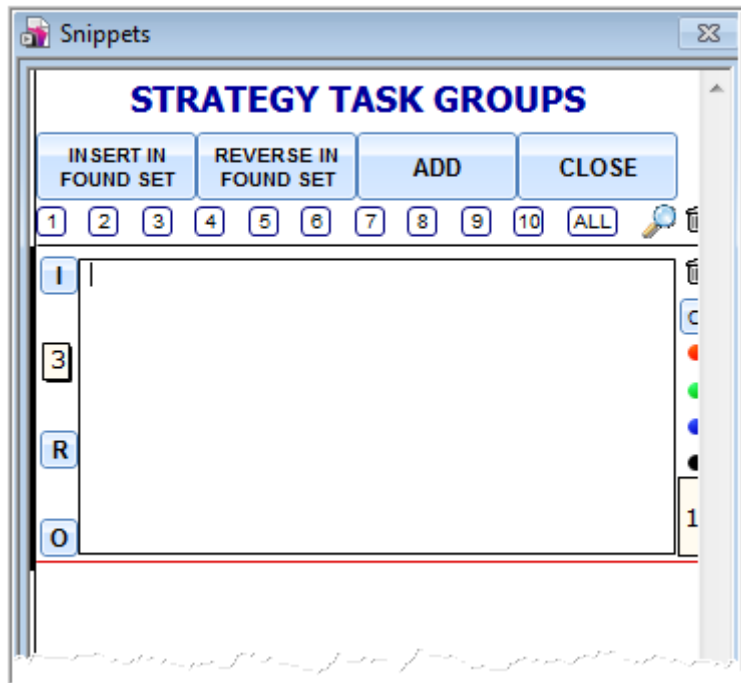


To add strategy tasks, click the Add button.



Note that once a group of strategy tasks are added, it will remain in the snippet window unless deleted. So next you open the snippet window of strategy task groups again, the strategy tasks that were previously added will be included in the existing list.

Then, add the strategy tasks in the field that is provided once the Add button is clicked.



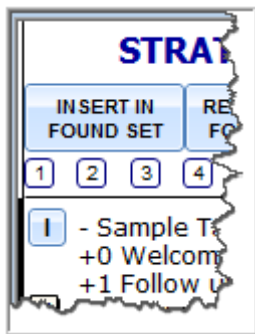
You can enter many ACTIONS in one Snippet or manually one per line for a complete Sales Strategy Cycle in one click.

- If you precede TASKS (lines) with a dash (-) then it becomes a Title and it won't be considered a task.
- If, in a title you put a code between double square brackets like `[[LENDER1]]` then that code is considered like a set In other words, different sets will be treated independently, test and check for yourself how powerful is this feature.
- A + sign and a number then the TASK will be scheduled AUTOMATICALLY based on those numbers (days in between actions).
- The numbers at the beginning of TASKS (lines) indicate days in between actions.
- Also, it is possible to use symbols for many contact fields like in the Template Manager. Therefore, `<<UDF 01>>` will be replaced by the content of the User Defined Field 01 for example.

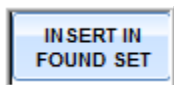
For example, we enter the following strategy tasks:



Once the strategy tasks are added, you can then insert them into the Task Manager using the 'I' button of the particular Strategy Task Group.



Or if you want to insert the current group of strategy tasks to ALL the selected clients, click the Insert In Found Set button.



Now when either the 'I' or Insert Found Set buttons are clicked, the next thing to do is select the agent that will be assigned to the tasks for the client/s.

Please select the AGENT that you want to assign this Snippet. You can also assign it to the GENERAL BOX

Select Agent

The tasks will then be added to the selected client/s Task Scheduler List with the number of days in between the tasks.

Find Text in Tasks All Tasks

Assign Task Strategy Add One Task Recalculate

Date calculations based on Date: 02/05/12

#	Date Type	Time	Days	Date	P
1	<input checked="" type="radio"/> Fix <input type="radio"/> Calc <input type="button" value="Clear"/>		0	02/05/12	<input type="button" value="3"/> Done
JS: Follow Up (see notes)					
2	<input checked="" type="radio"/> Fix <input type="radio"/> Calc <input type="button" value="Clear"/>		0	02/05/12	<input type="button" value="3"/> Done
JS: FOLLOW UP BY PHONE					
3	<input type="radio"/> Fix <input checked="" type="radio"/> Calc <input type="button" value="Clear"/>		0	02/05/12	<input type="button" value="3"/> Done
JS: Welcome E-mail					
4	<input type="radio"/> Fix <input checked="" type="radio"/> Calc <input type="button" value="Clear"/>		1	02/06/12	<input type="button" value="3"/> Done
JS: Follow up Letter					
5	<input type="radio"/> Fix <input checked="" type="radio"/> Calc <input type="button" value="Clear"/>		3	02/09/12	<input type="button" value="3"/> Done
JS: Presentation Online					
6	<input type="radio"/> Fix <input checked="" type="radio"/> Calc <input type="button" value="Clear"/>		1	02/10/12	<input type="button" value="3"/> Done
JS: Negotiation Call					
7	<input type="radio"/> Fix <input checked="" type="radio"/> Calc <input type="button" value="Clear"/>		2	02/12/12	<input type="button" value="3"/> Done
JS: Start Closing period					

PERSONAL AGENDA AND PAYMENT MANAGER

Personal Agenda is used to control all of your personal or business schedules as well as all of your payments that must be paid on a given time.

To access Personal Agenda/Payment Manager, click the Personal Agenda & Payment Manager button from the main screen.



Now you should be in the PERSONAL AGENDA screen. It will show you everything on one screen: Calendar, Events, Days with Events, Recurring Events, etc.

Now is: 2:31:09 PM
Today is: Fri, Feb 24, 2012
RECURRENT INFORMATION

DESCRIPTION	ALARM DATE & TIME	ACTUAL DATE & TIME	DUR	CLASSIFY	EI	EVERY	NEXT ON	TIMES

Now is: 2:31:09 PM
2012
TODAY
February
Today is: Fri, Feb 24, 2012

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			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			

Click on any Day to jump to that date.

Days with * have messages.

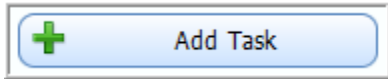
The day selected becomes RED.

PERSONAL AGENDA & PAYMENT MANAGER

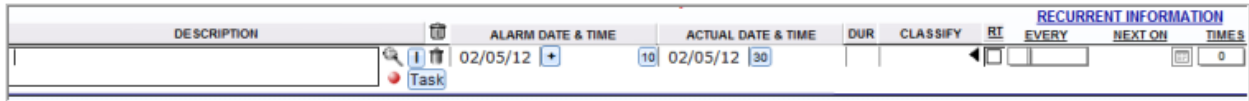
- [Back To Contacts](#)
- [Add Task](#)
- [Duplicate Task](#)
- [Delete Day](#)
- [Week View](#)
- [All Days View](#)
- [Update To Today](#)
- [Print](#)
- [Import](#)
- [Find](#)
- [Find General Agenda](#)
- [Find Your Agenda](#)
- [Calculator](#)
- [Wizard](#)
- [Help](#)

ADDING A TASK

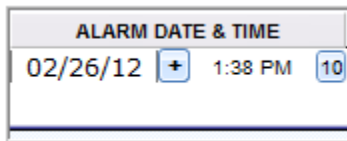
Click the ADD TASK button to add a task.



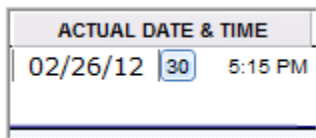
Once you add a TASK, the following line is created or added in the task area. Enter the task information in the provided fields.



Enter in the ALARM DATE & TIME the date and time the task is set to alarm. To add 10 minutes after the time on the time field, click the 10 button with SHIFT. Other options are available once you hover on the 10 button.



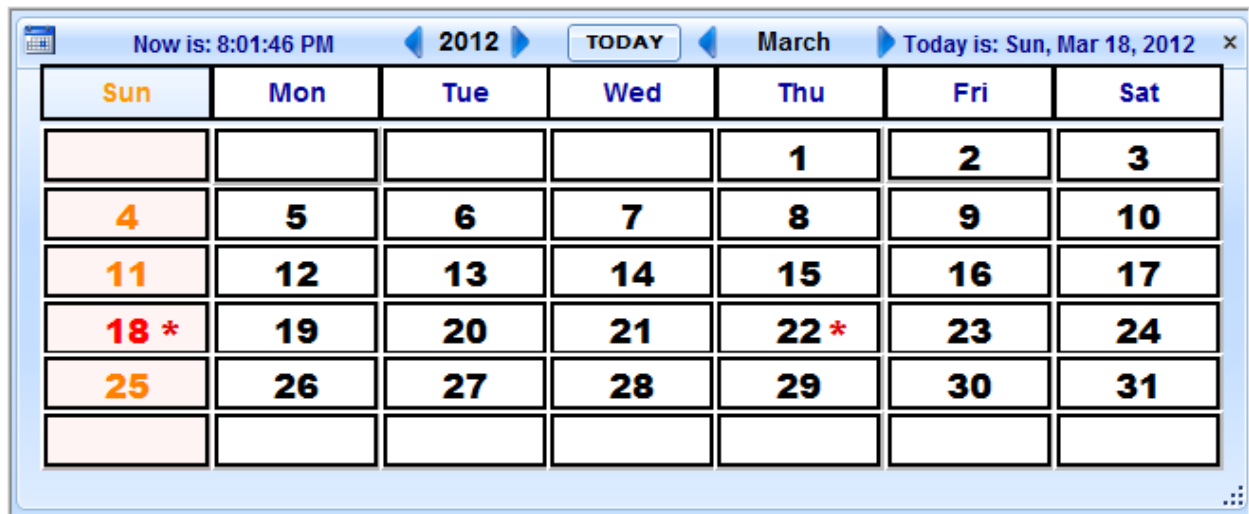
Enter in the ACTUAL DATE & TIME the task must be performed.



To add 30 days after the actual date, click the 30 button. To add one day after the actual date, click the 39 button with SHIFT. To reduce one day from the actual date, click the 30 button with SHIFT + CTRL. To set the actual date to TODAY's date, click the 30 button with SHIFT+ALT+CTRL.

Note that once a task is set to alarm at a specific time, it will be automatically hidden in the task area and kept on the Personal Agenda's calendar EXCEPT the ones that are set to alarm TODAY.

THE CALENDAR



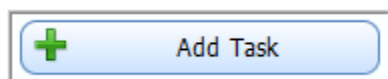
The calendar at the bottom of the Personal Agenda screen is used to let you select a date by clicking on the calendar days and see which dates have tasks based on its asterisk.

Note When you create a task on a particular day, the date the task is set to alarm will be marked with an asterisk on the calendar.

ADDING TASKS USING THE CALENDAR

To add tasks with automatic desired alarm date, click the date on the calendar to be used as alarm in the task information.

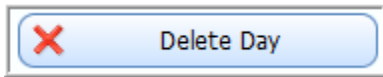
Then click the Add Task button.



DELETING TASKS

There are two ways to delete tasks:

- 1) By deleting tasks one by one using the Garbage Bin icon.
- 2) Click the date on the calendar to delete ALL the tasks of the selected date and then click the Delete Day button



and click DELETE

