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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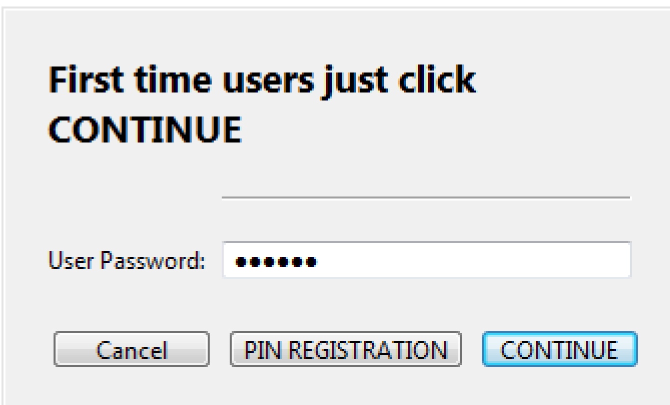
REGISTERING CRM FINANCIAL MACHINE

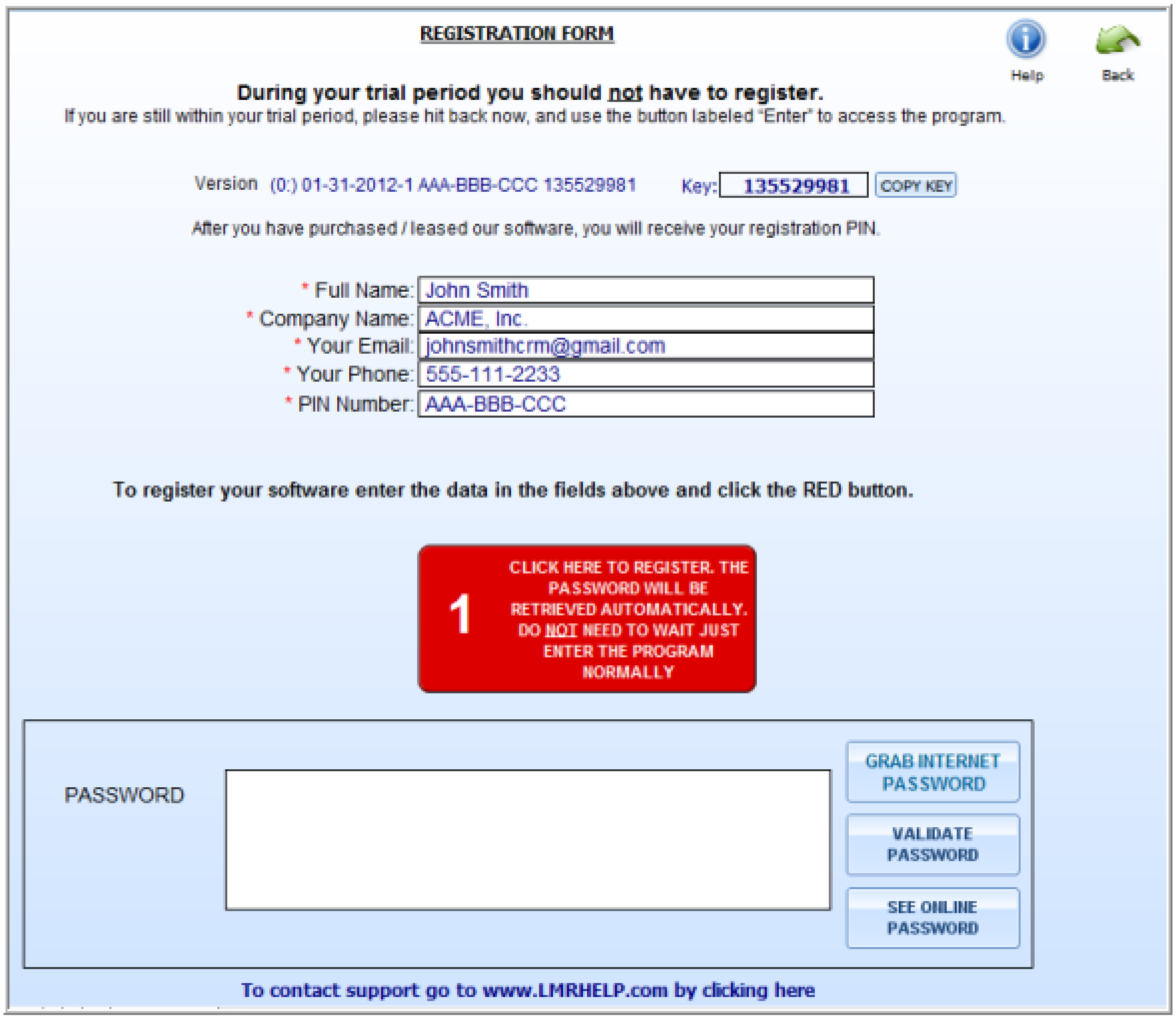
When you open the software you will see the Menu Screen.

If you are under a trial, simply click ENTER

And then CONTINUE.



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.



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.

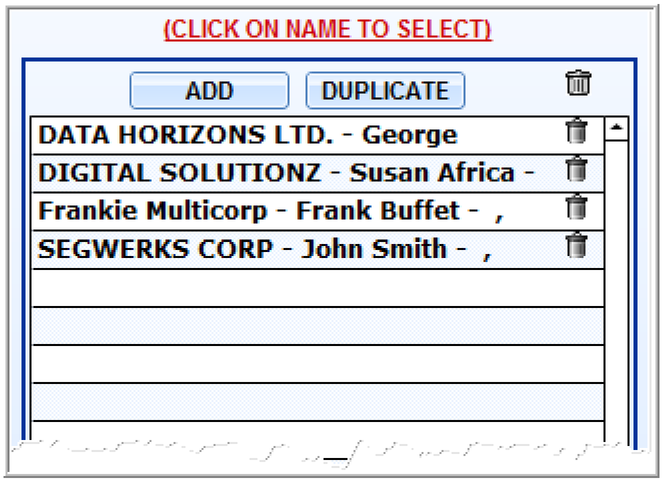
In the Company Information section, click the ADD button at the right side of the screen.

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

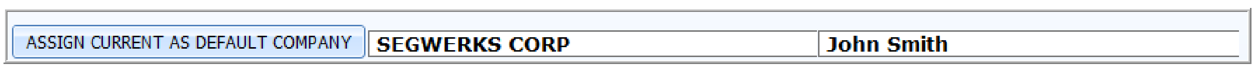
SELECTING DEFAULT COMPANY

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.

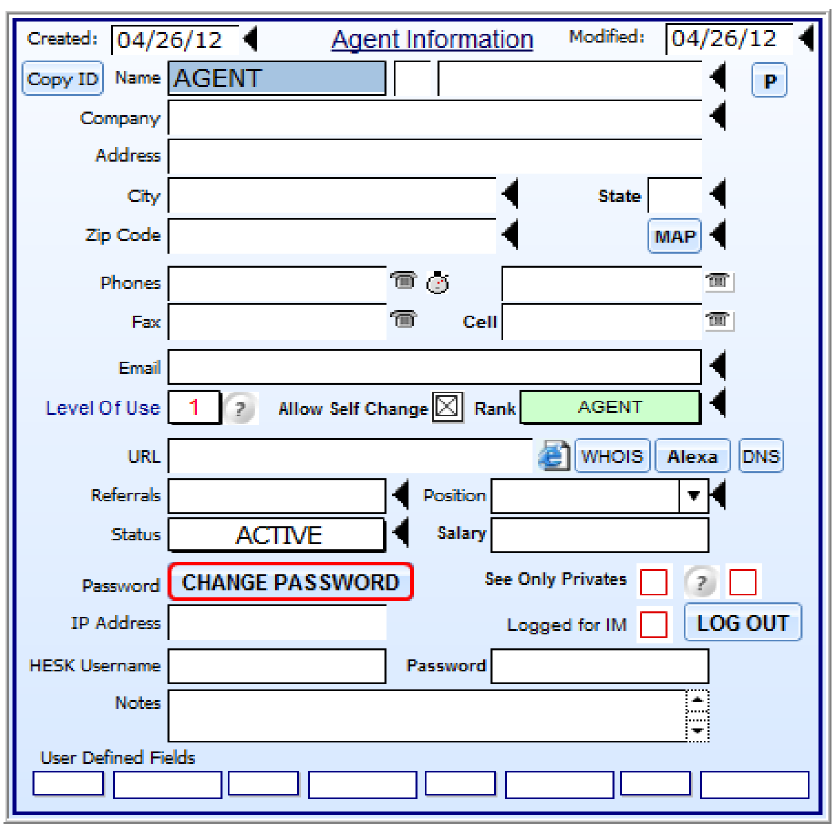
ENTERING BASIC AGENT INFORMATION

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

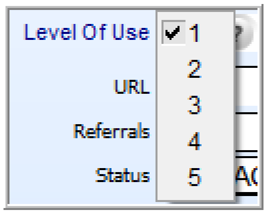
Once in the Setup, click the AGENT PRIVILEGES button.

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.

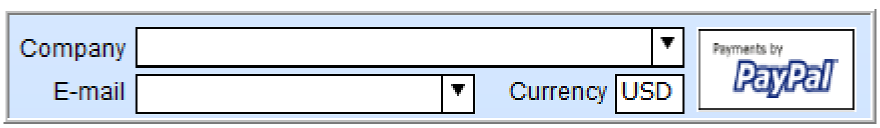


One of the most important data to fill in this section about the agent is the level of use. The level determines what level the agent can only access in the software.



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

REQUEST PAYMENT

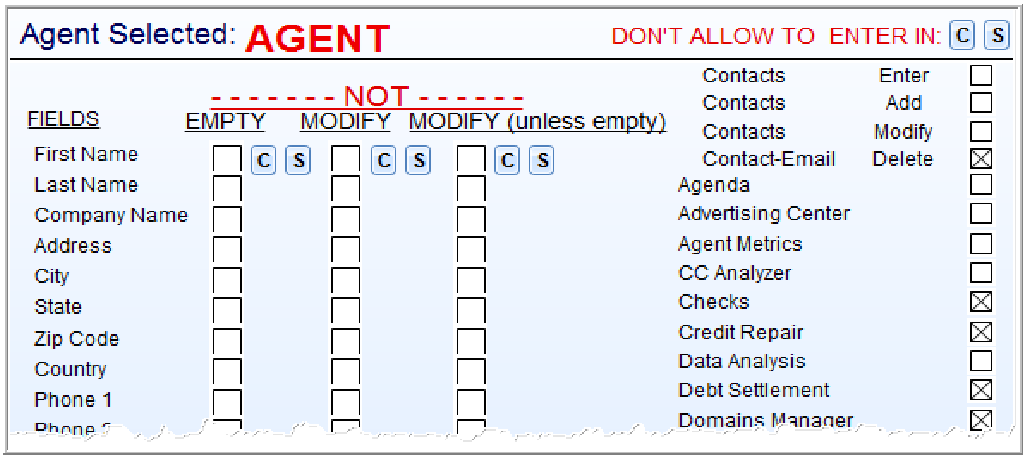


In the case where the agent requests payment, you can use this area of the Agent Privileges. You can do this if the agent requests for payment through PayPal.

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.

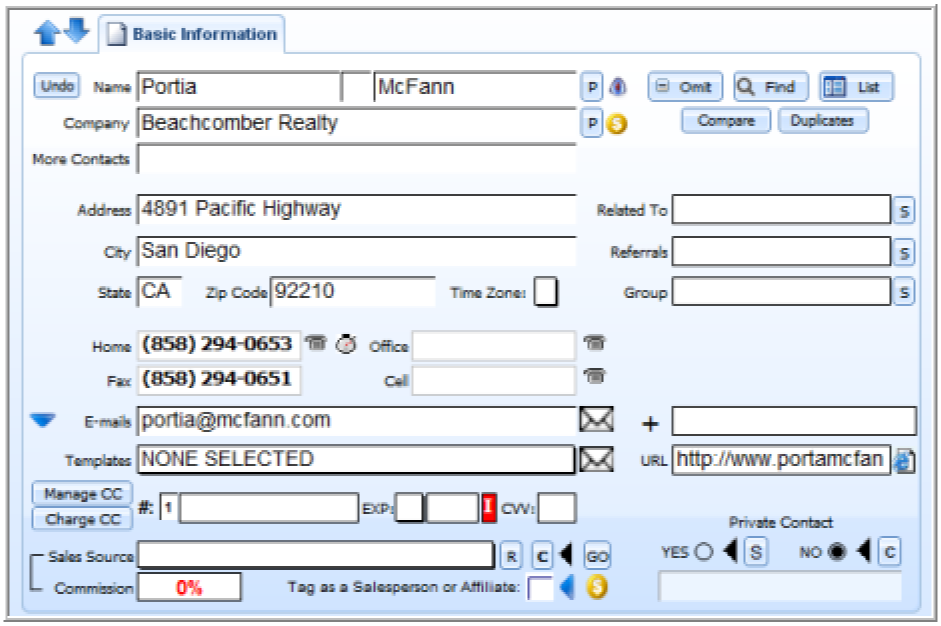


CLIENTS AND PROSPECTS

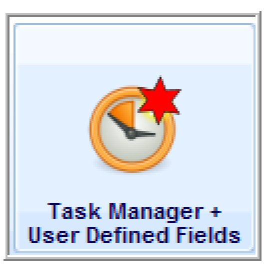
ADDING A NEW CLIENT

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

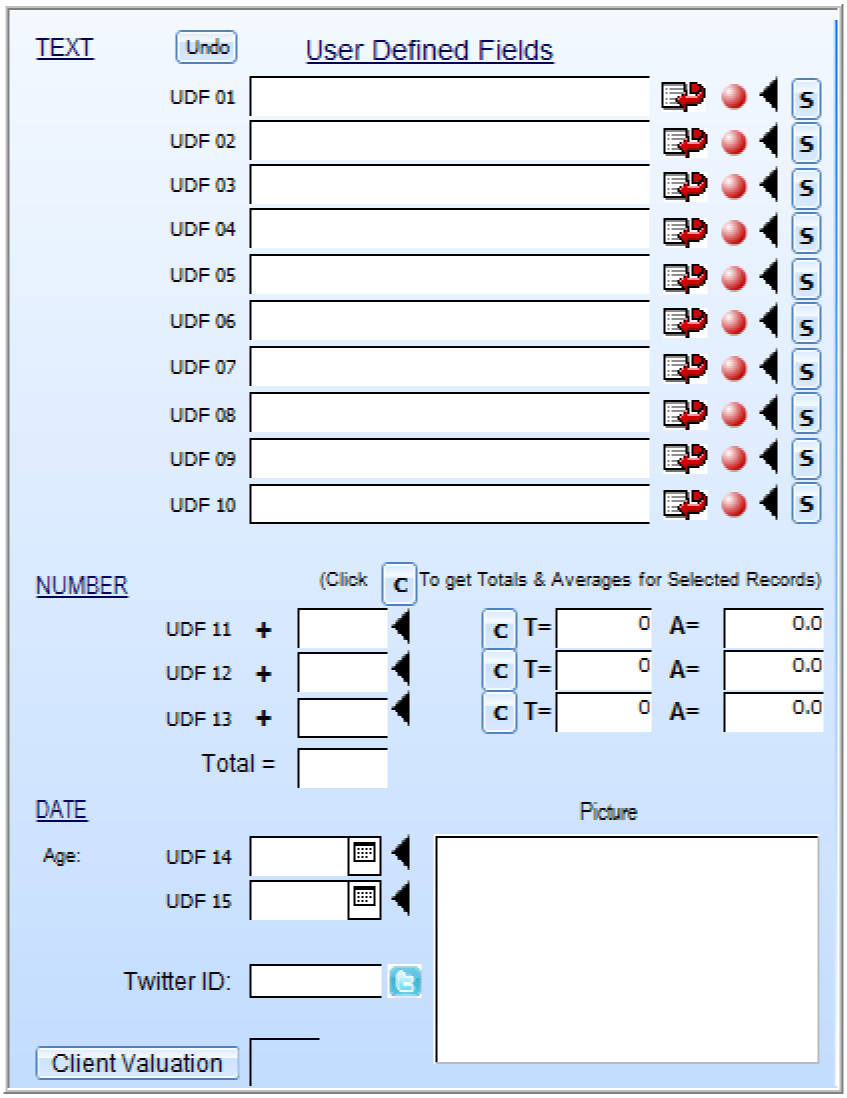
Enter the basic information for this client such as its name, address, phone number, etc.



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

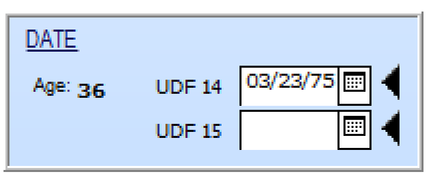


The User Defined Fields area will open in the center of the screen and then you can enter the Social Security and D.O.B. in User Defined Fields number 10 and 14.



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.

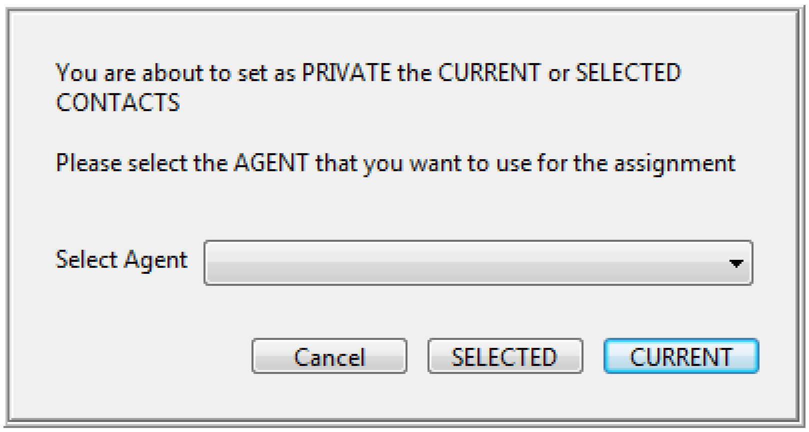


SET AS PRIVATE CONTACT

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

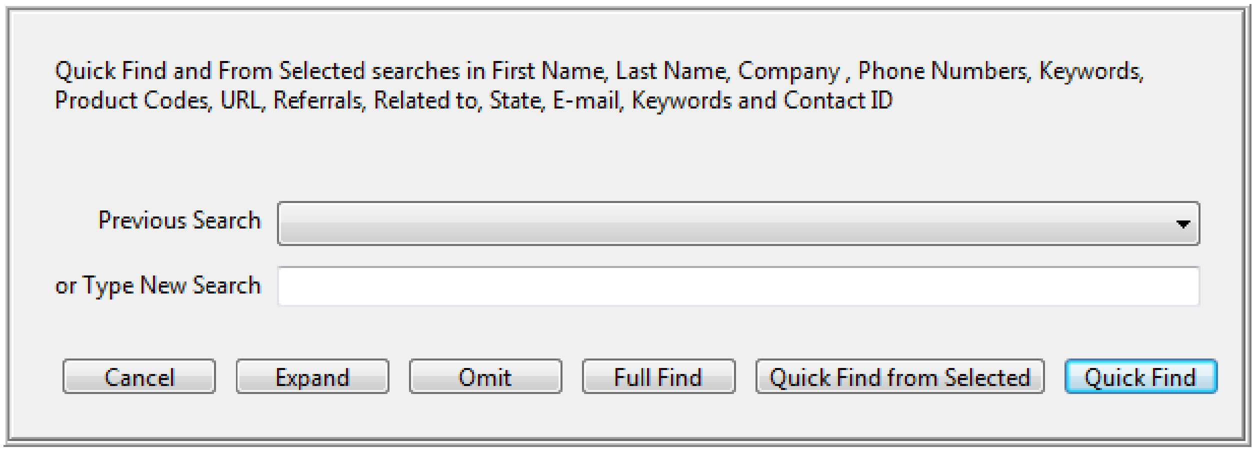
Select the agent to be assigned for the current contact



FINDING CLIENTS (QUICK FIND)

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

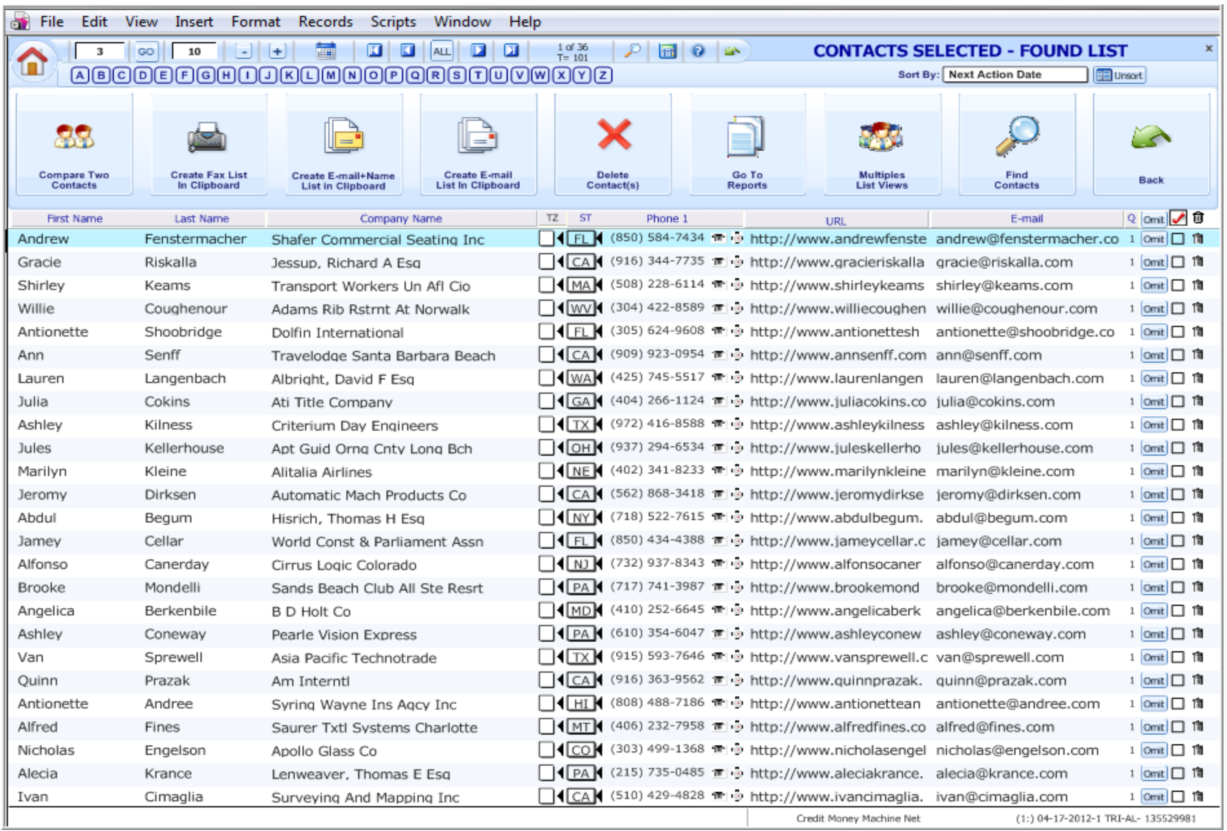
A windows dialog will then pop up where you can enter the query of information on the client/s you want to find.



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.



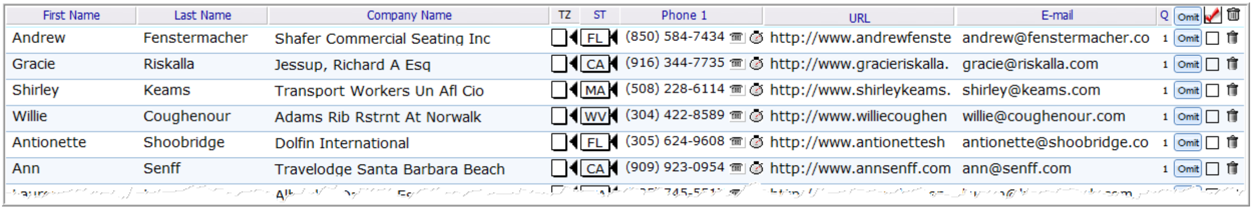
DELETING CONTACTS

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.

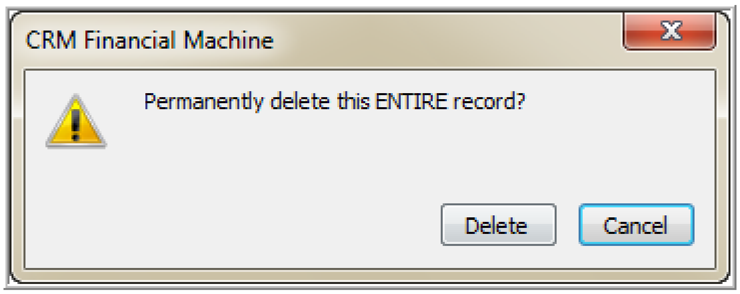
To do this, click the LIST button from the main screen.

DELETING CONTACTS FROM LIST

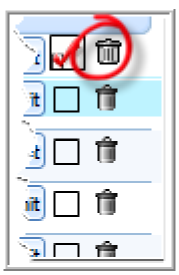


First Name	Last Name	Company Name	TZ	ST	Phone 1	URL	E-mail	Q	Omit		
Andrew	Fenstermacher	Shafer Commercial Seating Inc		FL	(850) 584-7434	http://www.andrewfenste	andrew@fenstermacher.co	1	Omit		
Gracie	Riskalla	Jessup, Richard A Esq		CA	(916) 344-7735	http://www.gracieriskalla.	gracie@riskalla.com	1	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		

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.

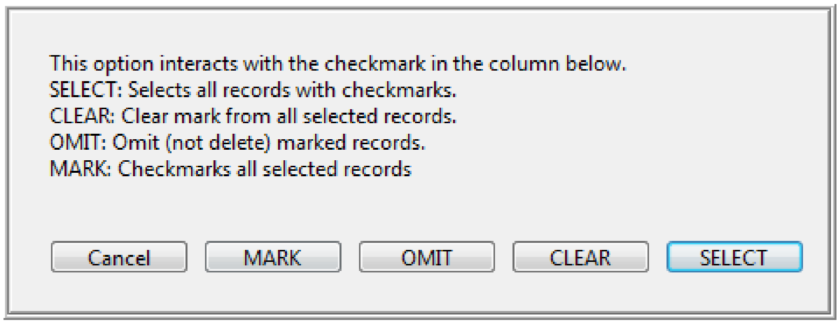


In the case where you don't want this to pop up every time you delete a contact, just click the GARBAGE BIN icon on top of all the same icons on the column.



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

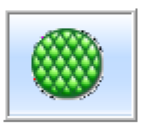
Note To mark all the contacts on the list, click the checkbox with a check from the checkbox column and select MARK.



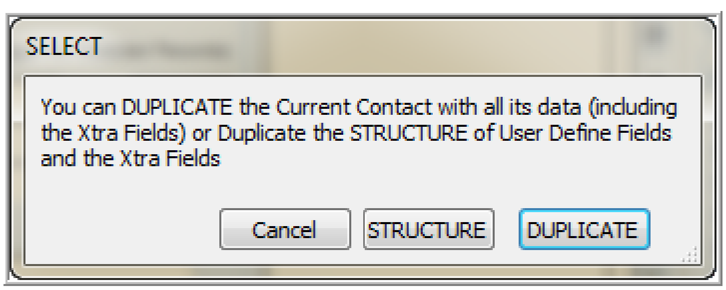
Once, the group of contacts to be deleted are marked, click the DELETE CONTACTS button.

DUPLICATING CONTACTS

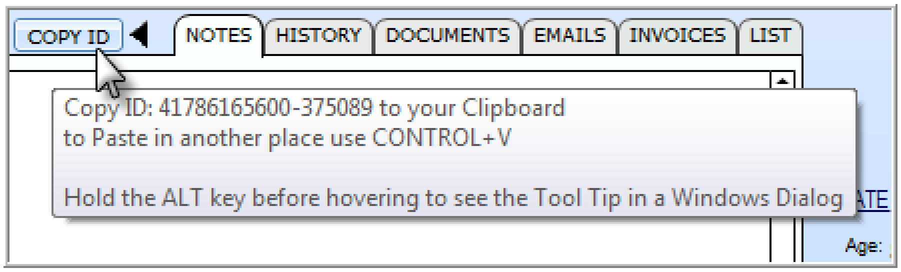
To duplicate the current contact, click the green "honeycomb" icon at the top left of the main screen.



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

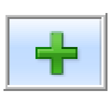
Account Payables is part of the software where you can control all your payables including recurring payables and create checks to pay for them in one click.

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.

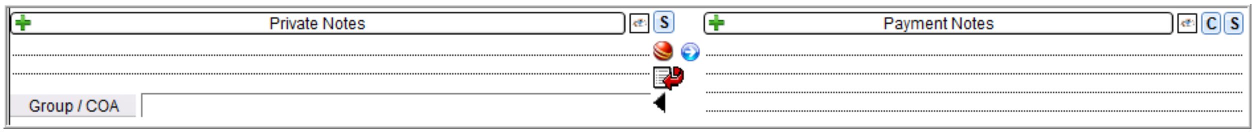
ADDING A PAYABLE

Click Add Payable to add a payable item entry

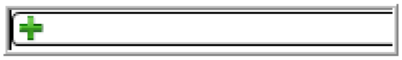
or the green plus button at the upper left part of the Payable screen.



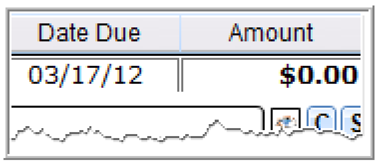
Enter the description of the entry either in the Private Notes or in the Payment Notes field.



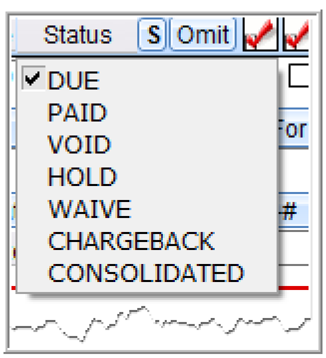
To include a date in the note, click the green plus button.



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



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.

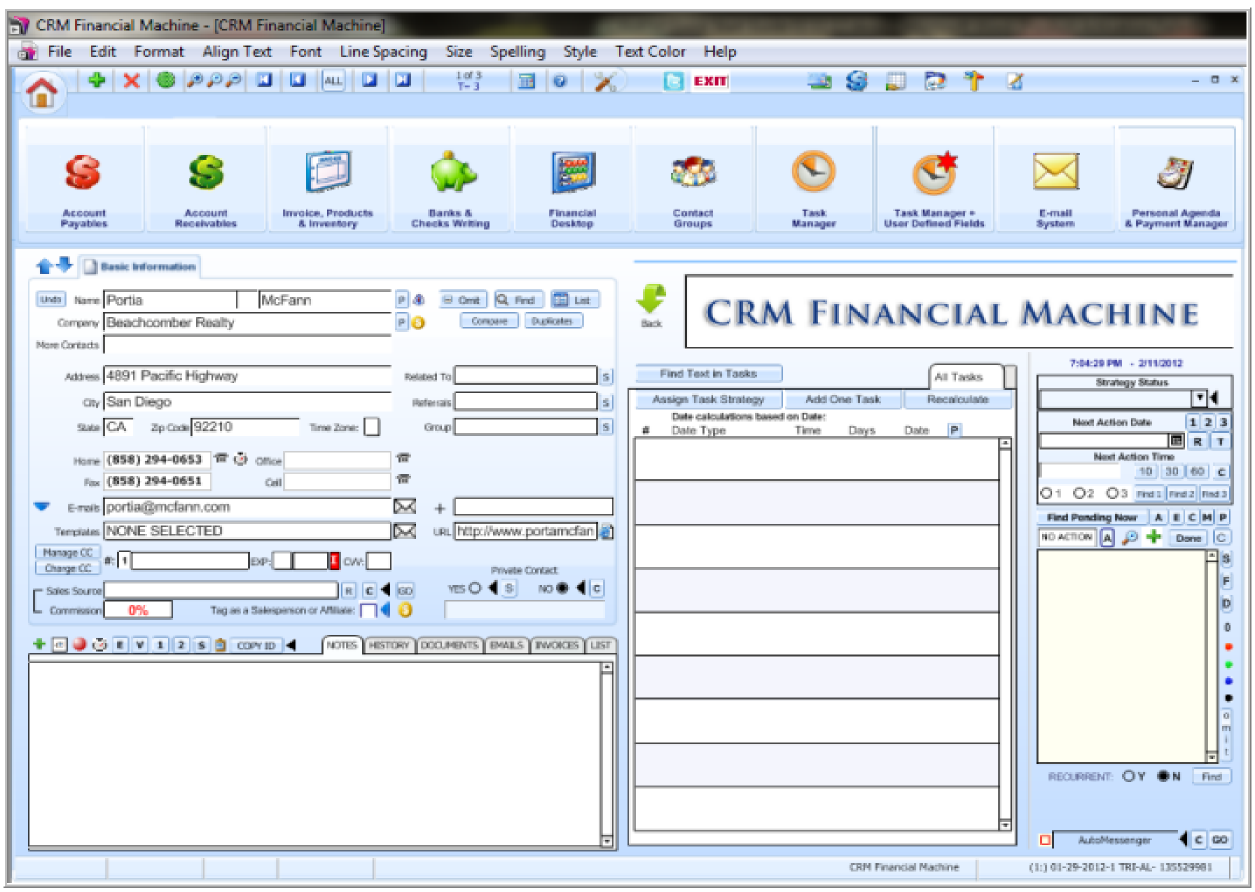


TASK MANAGER

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.

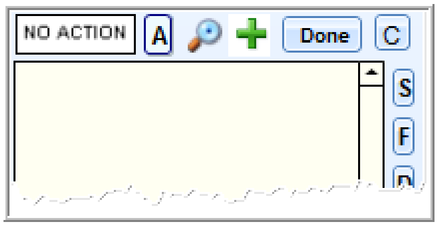
Note that the Task Manager is displayed ON the main screen once accessed without going inside the software.



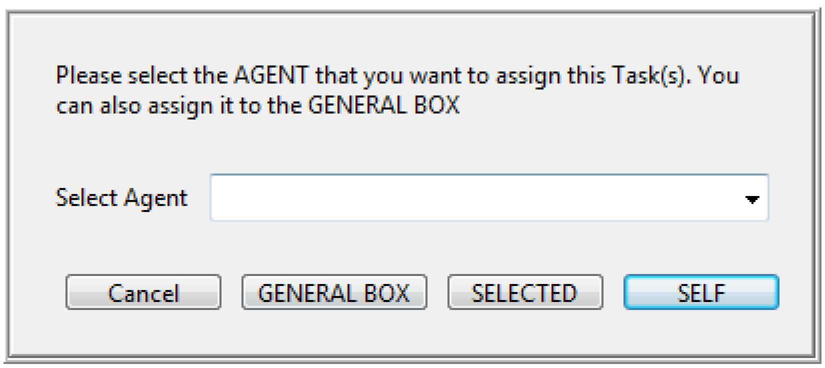
ADDING A TASK

USING THE GREEN PLUS BUTTON

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



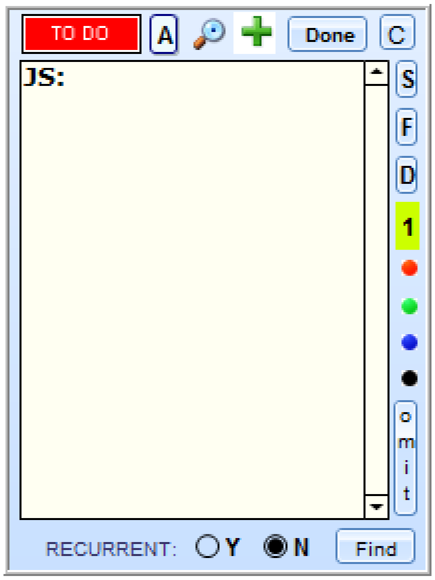
Then select the agent to assign the task.



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,

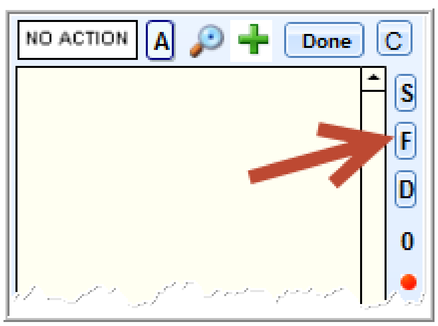


Then click on the task box to write the task with regards to the current contact.

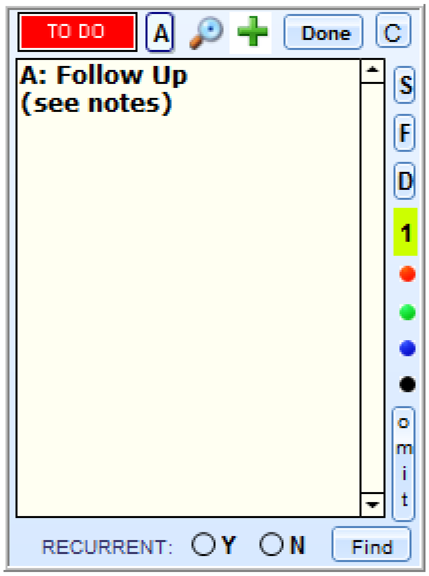
USING THE F BUTTON

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

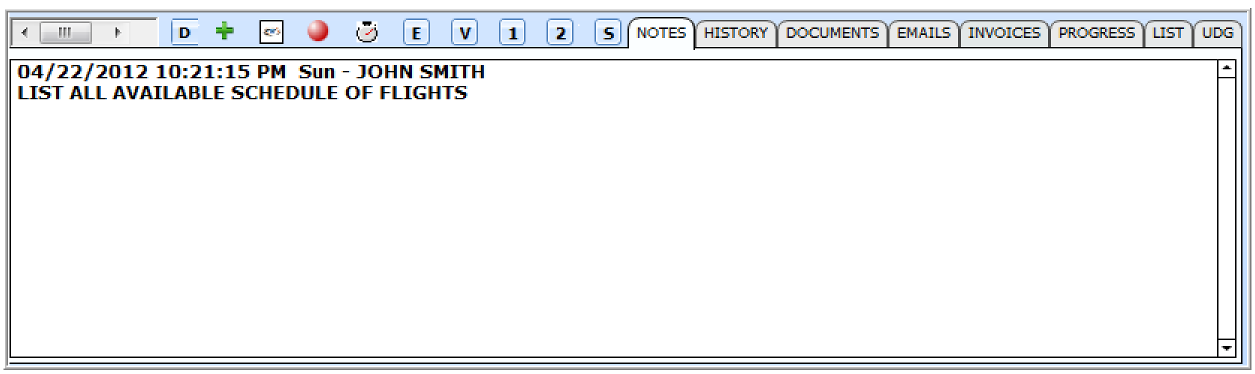
To add a task using this option, click the F button.



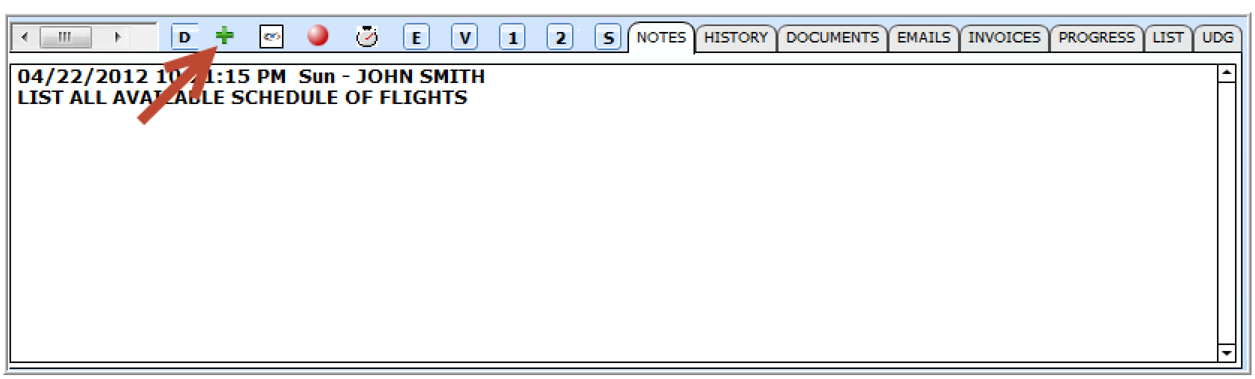
Automatically, the task will be scheduled for TODAY with the default task "Follow Up (See Notes)".



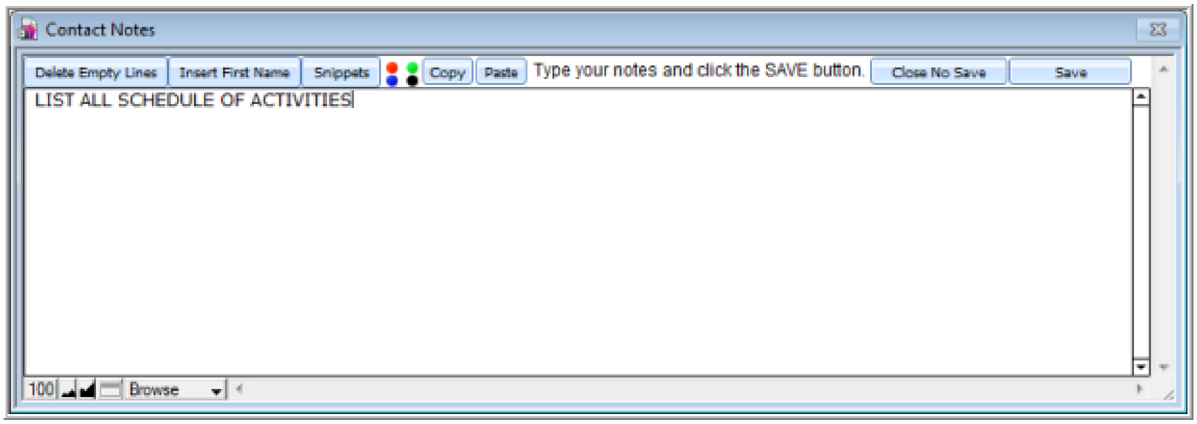
So instead of having to put the task in the task box, you can have it in the Notes area under the current contact's Contact Information Section.



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.



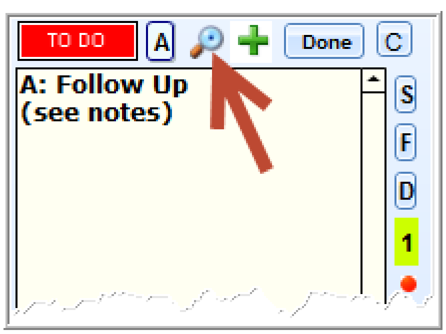
Note that this is a very different approach of creating a personal task just like in PERSONAL AGENDA in a way that using the software's TASK MANAGER, the tasks are created for you to do to the client linked to it.

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

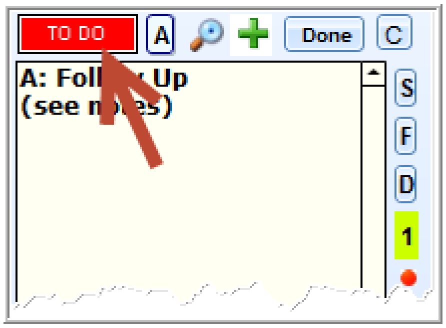
All the task created that is to do to a certain client are displayed in one list called Task Scheduler List. This list is particular to a client with the agents assigned to them.

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



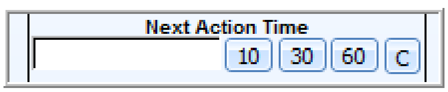
HOW TO RESCHEDULE TASK

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.

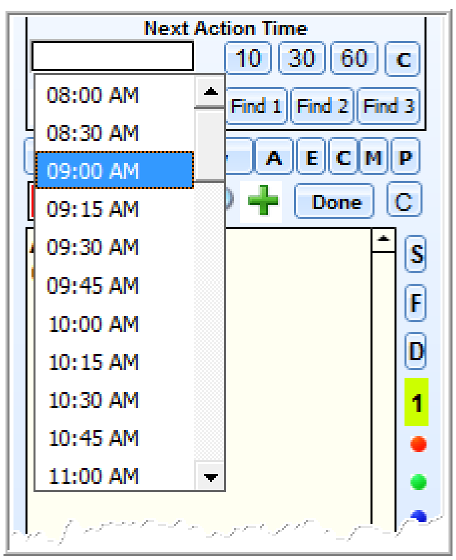


There are several ways to reschedule a task based on the TIME.

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.



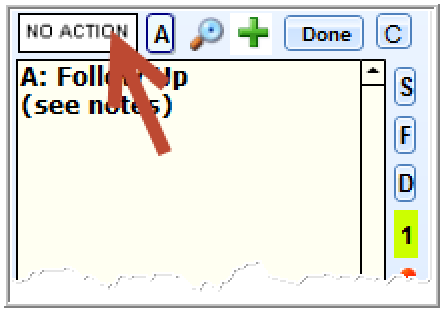
2) By clicking on the time field and selecting from the given default time list.



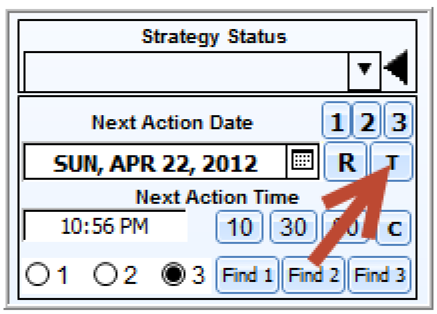
3) By manually entering the time based on the software time format HH:MM A.

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.

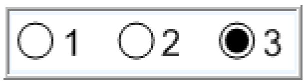
HOW TO SET PRIORITY TO TASKS

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

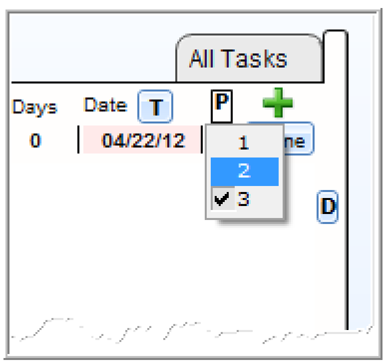
Note that the Task Manager has priorities 1 to 3: 1 having the highest priority and 3 having the lowest. When you create a task for a client, the task manager will set the priority of the task to 3 by default.

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

1) By selecting from the radio buttons



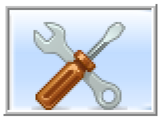
2) By the drop down priority list in the Task Scheduler List



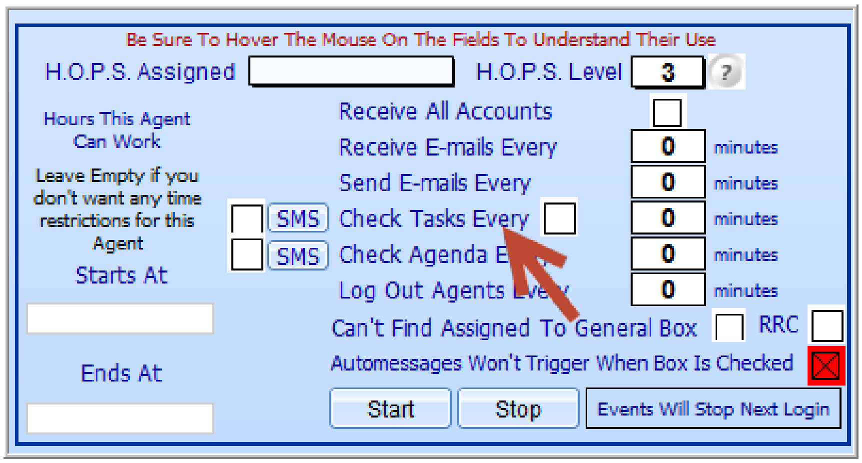
CHECK TASKS EVERY DESIGNATED MINUTES

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.

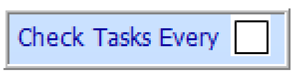
For the software to check the tasks for you and at the same time remind you through pop ups, click the Setup icon at the upper part of the main screen and select the Agent Privileges button.



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.



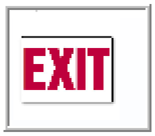
In the case where you want to snooze automatically every 5 minutes and the pop-up will close without any further action, click on the checkbox beside the Check Tasks Every.

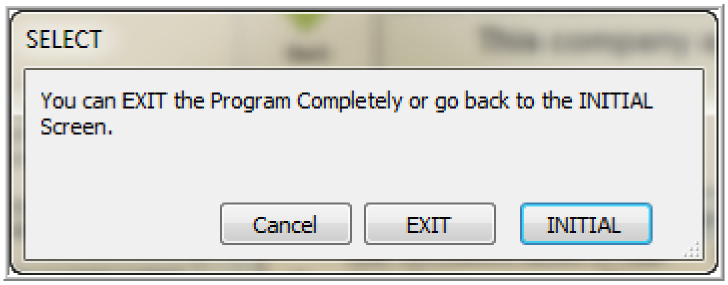


Now once the number of minutes is indicated for the software to check the task, click the Start button.

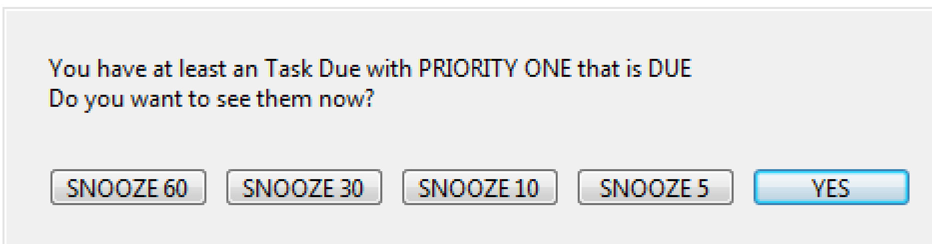
Note that the event will only start in the next login. Meaning, you have to logout from the software first and login again.

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.

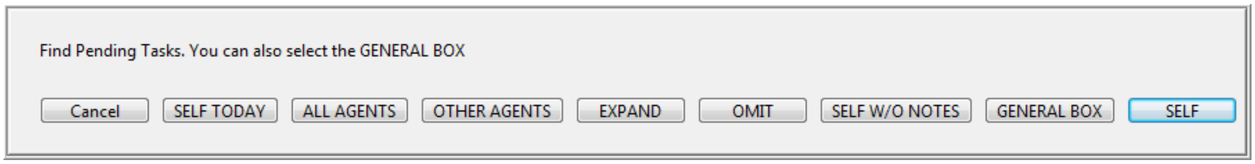


FIND PENDING TASKS

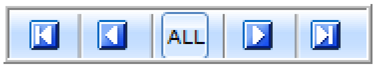
Find Pending Tasks is the same as checking tasks but without having the software do the checking for you in designated minutes. This way you can check the tasks all by yourself in any time you want to do them.

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.

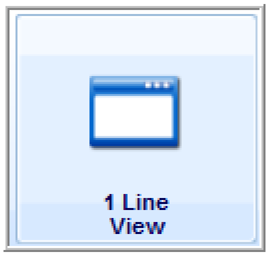
On the other hand, in the case where all the tasks have the same priority, it will check for the tasks based on who is oldest.

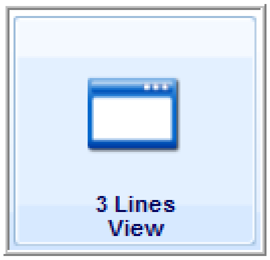
If all the tasks have been created at the same date, it will display by its natural order.

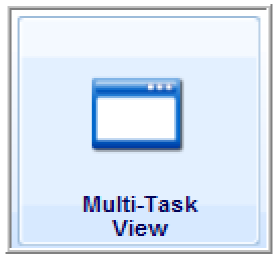
There is also another technique which is to DISPLAY ALL THE FOUND TASKS IN A LIST – by clicking the List button from the main screen.

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.

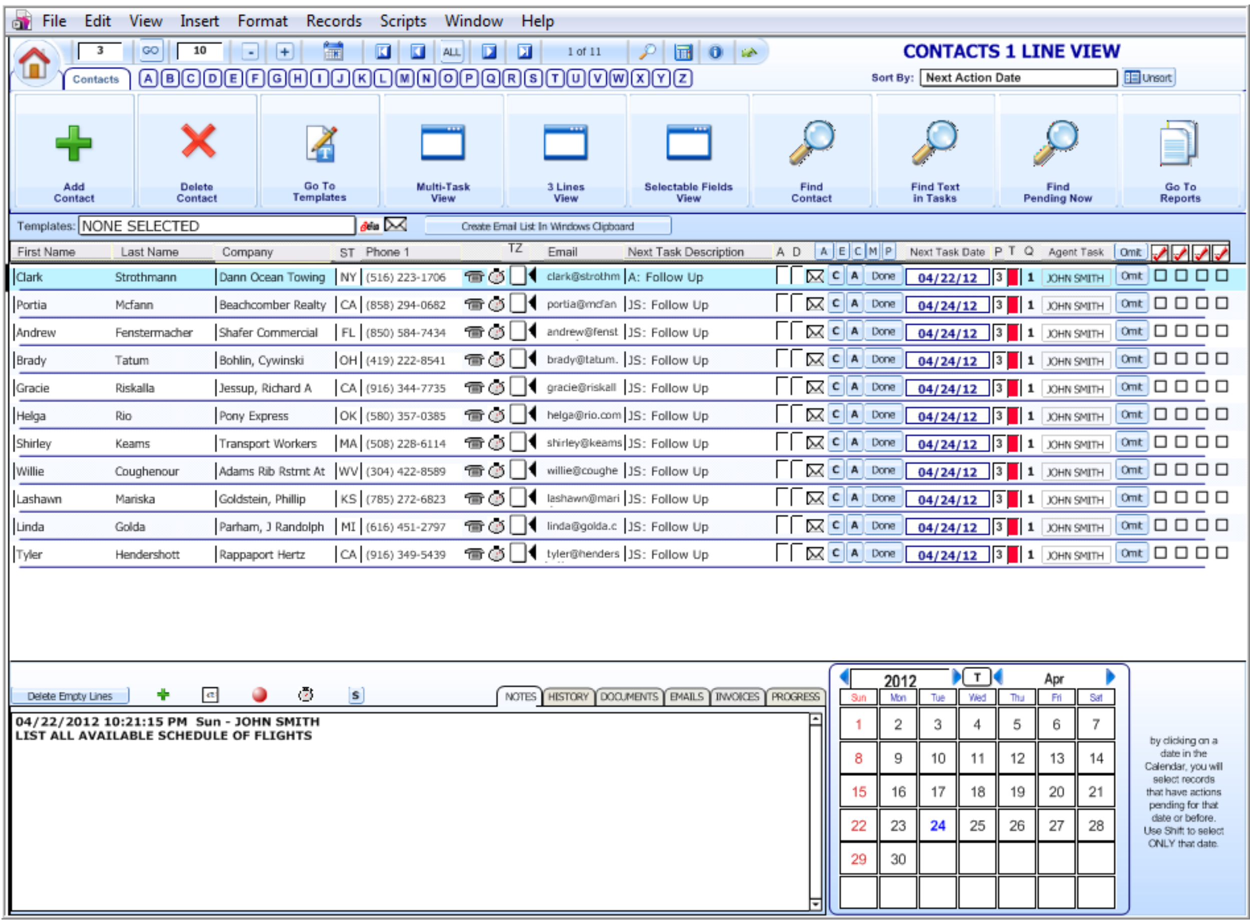
In the Task List View, you can have three different ways to view the tasks by clicking any of these buttons:



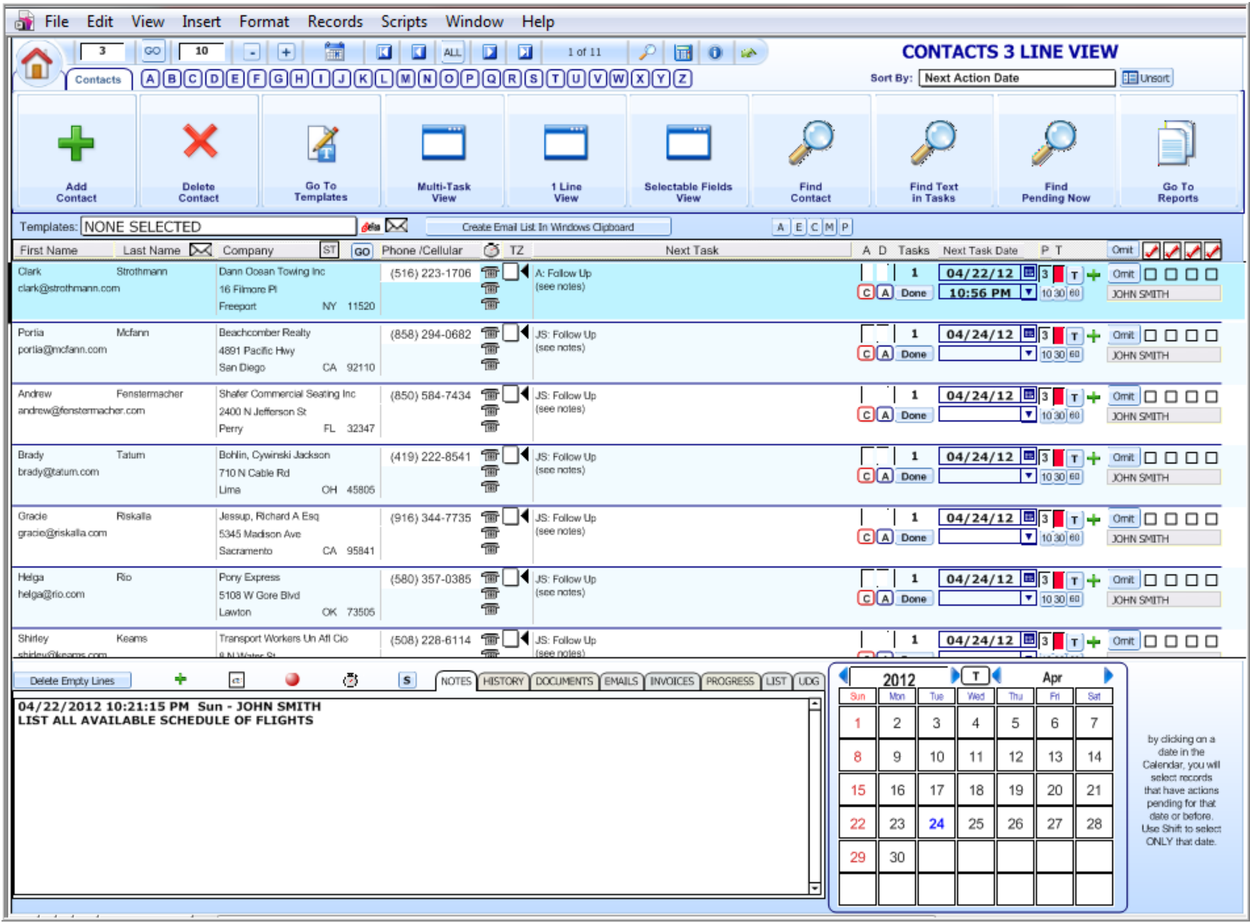




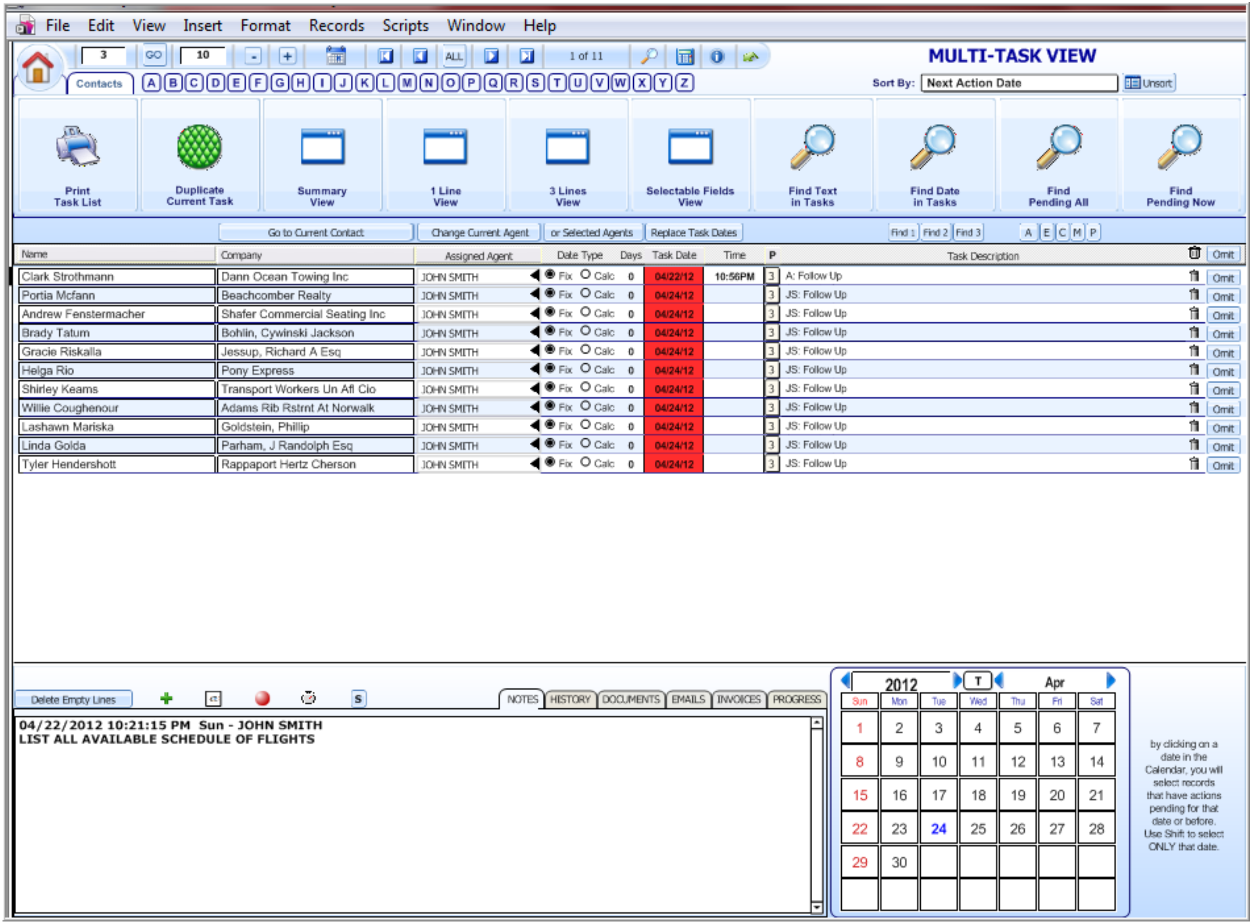
In the 1 Line View, the tasks of the agent are displayed all in one line.



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



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

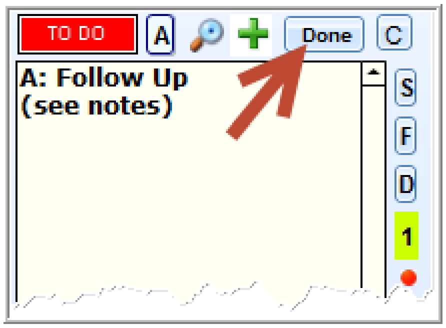


HOW TO DISPOSE TASKS

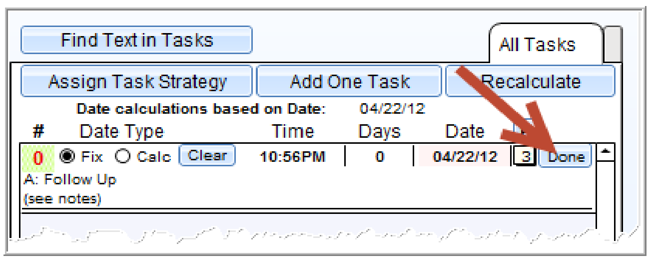
There are several reasons why you want to dispose a task. One of the most basic reasons is if you have already done the task for the client. The same way, you can also have several ways in disposing a task.

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

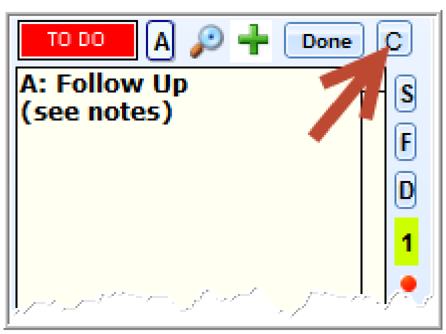
1) By clicking the <u>DONE</u> button of the task that is in the Task Box. Usually, the task contained inside the said task box is the task with the highest priority among the others.



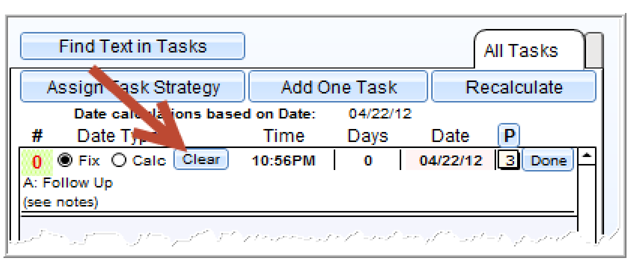
The DONE button can also be found on each of the tasks in the Task Scheduler List where you can directly dispose other tasks that are not in the task box.



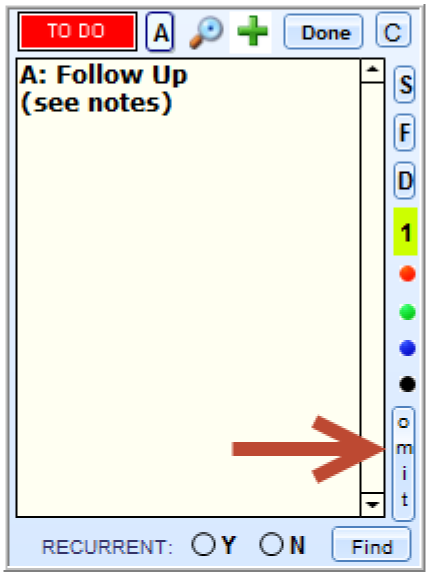
2) By clicking either the <u>C</u> button of the task that is in the Task Box



or the <u>CLEAR</u> 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.

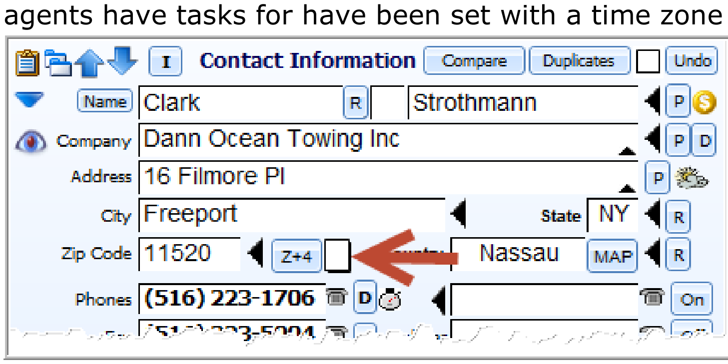
4) By rescheduling the task. This way, it is as if you have created a new task by just overwriting the content of the task with the old one.

FINDING AND SELECTING TASKS

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

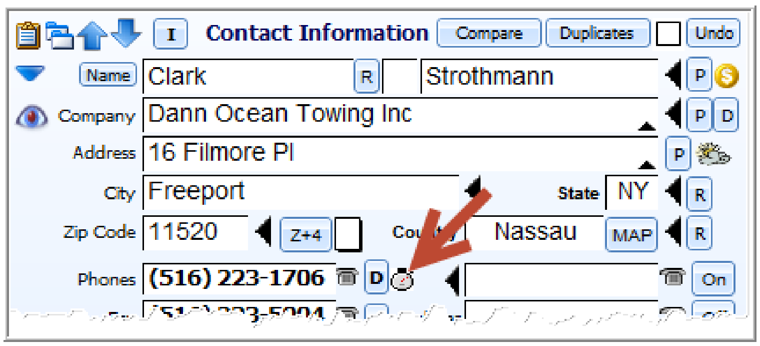
1) By finding based on time zones: E (Eastern), C (Central), M (Mountain), P (Pacific)

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.



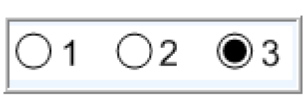
Now to find and select contacts with tasks assigned to an agent based on time zone, just select from the E, C, M, or P buttons

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

2) By the priority number.

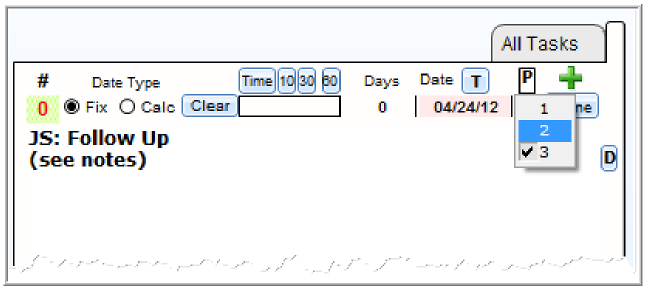
Note that when adding a task, by default, its priority is set to 3. Now to change its priority, you have two ways:

a. By selecting from the radio buttons



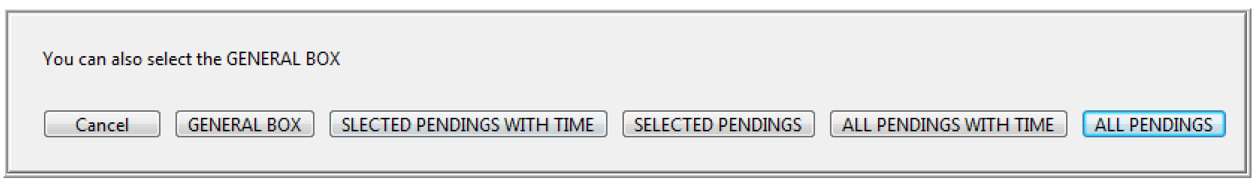
This is the case if you want to change the priority of the task that is in the task box.

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



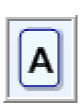
Now to find and select tasks based on their priority, click from the Find 1, Find 2, or Find 3 buttons.

Then select what kind of tasks

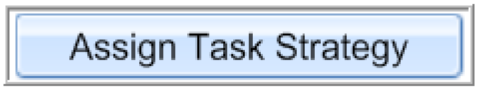


ASSIGNING STRATEGY TASKS

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

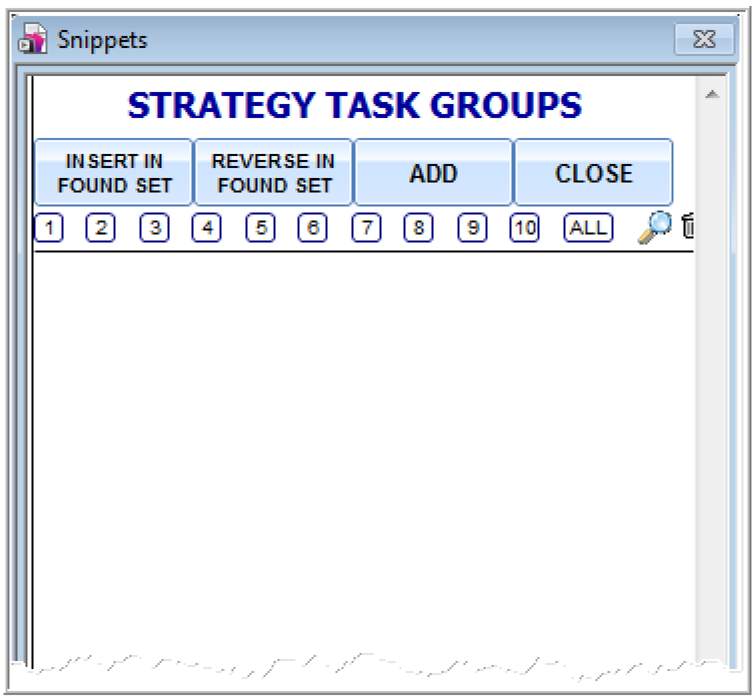


Or the Assign Task Strategy button in the Task Scheduler List

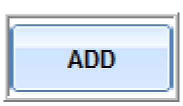


The tasks created using this are called STRATEGY TASKS. Strategy tasks are tasks that are grouped in order to utilize the time of adding tasks one by one. Usually tasks are grouped because they are under the same task category or they are tasks that are related to each other and must be done consecutively.

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

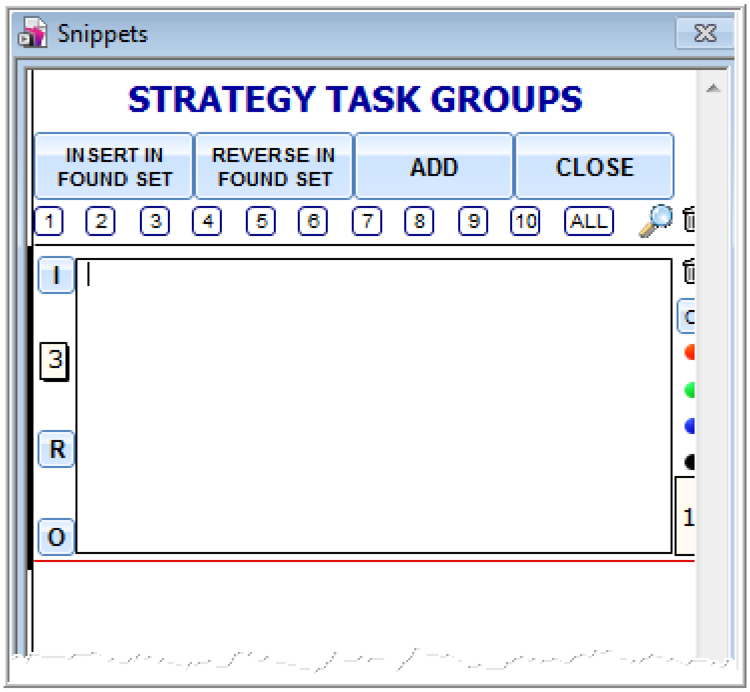


To add strategy tasks, click the Add button.



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.

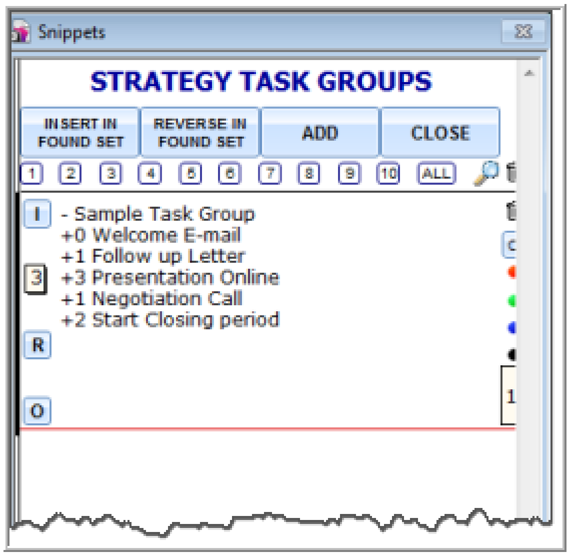
Then, add the strategy tasks in the field that is provided once the Add button is clicked.



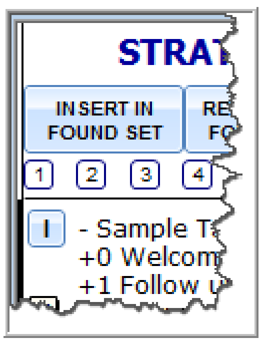
You can enter many ACTIONS in one Snippet or manually one per line for a complete Sales Strategy Cycle in one click.

- 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.

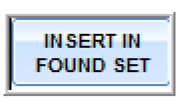
For example, we enter the following strategy tasks:



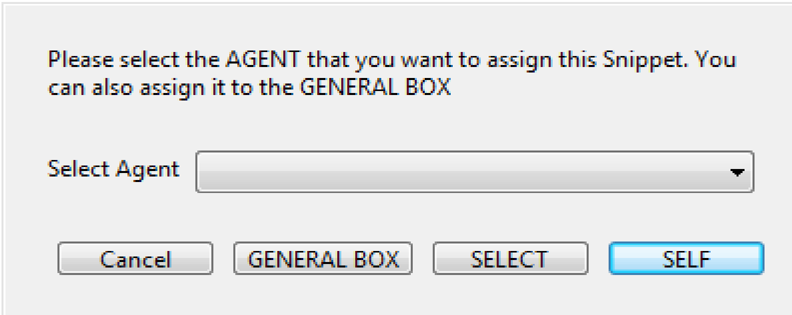
Once the strategy tasks are added, you can then insert them into the Task Manager using the 'I' button of the particular Strategy Task Group.



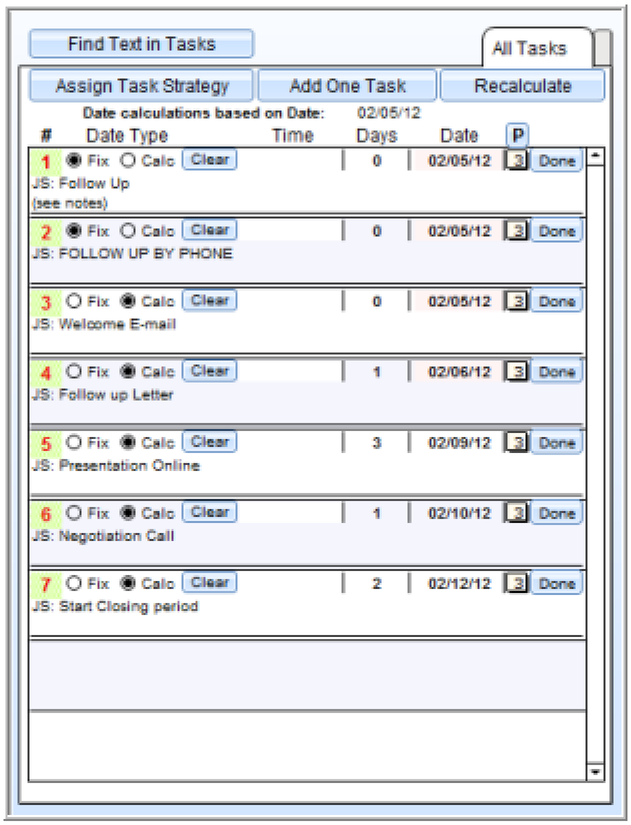
Or if you want to insert the current group of strategy tasks to ALL the selected clients, click the Insert In Found Set button.



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.



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

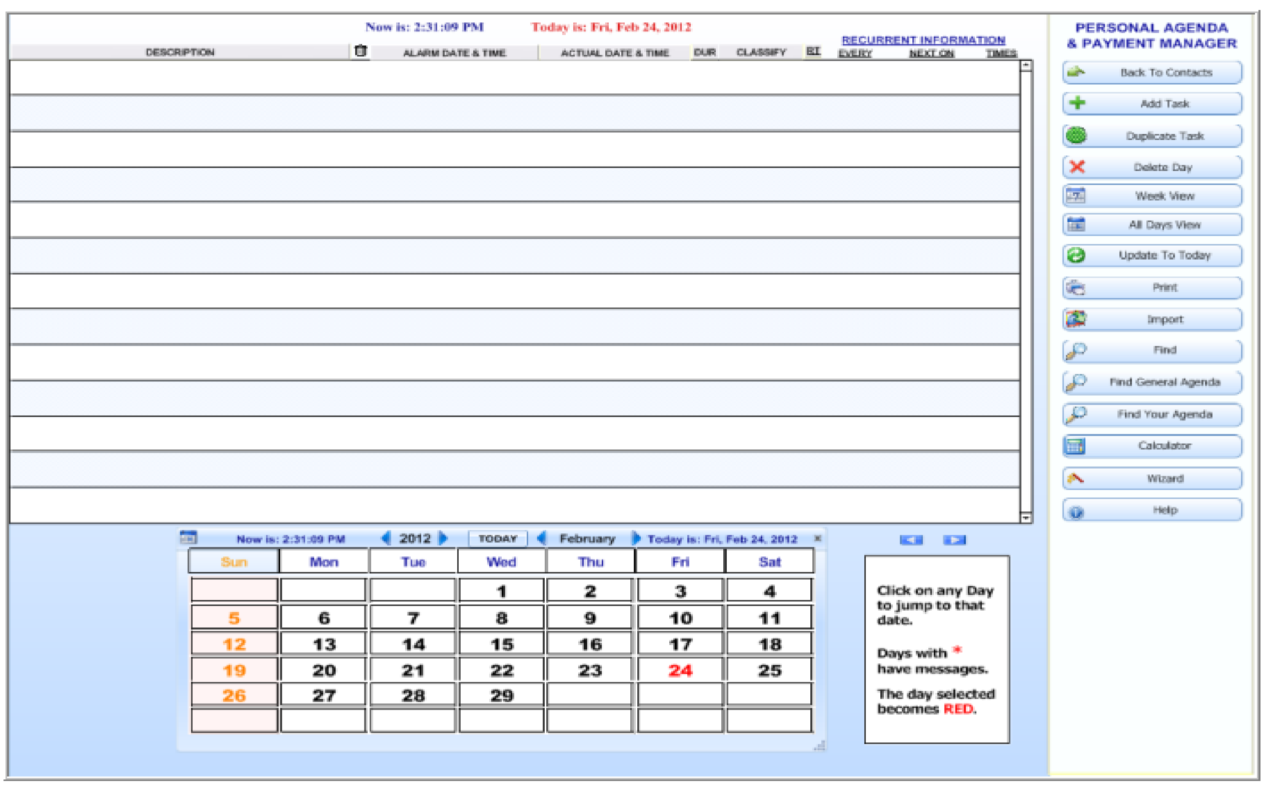


PERSONAL AGENDA AND PAYMENT MANAGER

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.

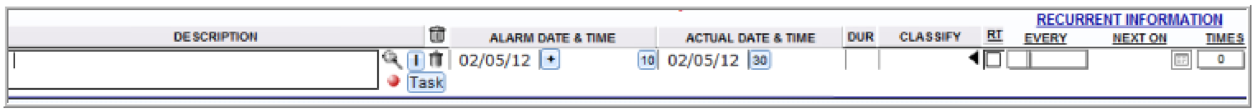
Now you should be in the PERSONAL AGENDA screen. It will show you everything on one screen: Calendar, Events, Days with Events, Recurring Events, etc.



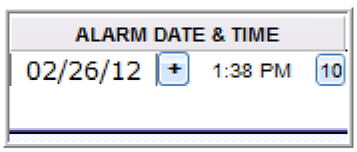
ADDING A TASK

Click the ADD TASK button to add a task.

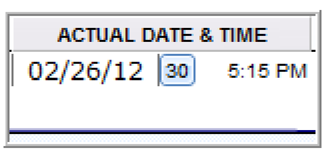
Once you add a TASK, the following line is created or added in the task area. Enter the task information in the provided fields.



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.



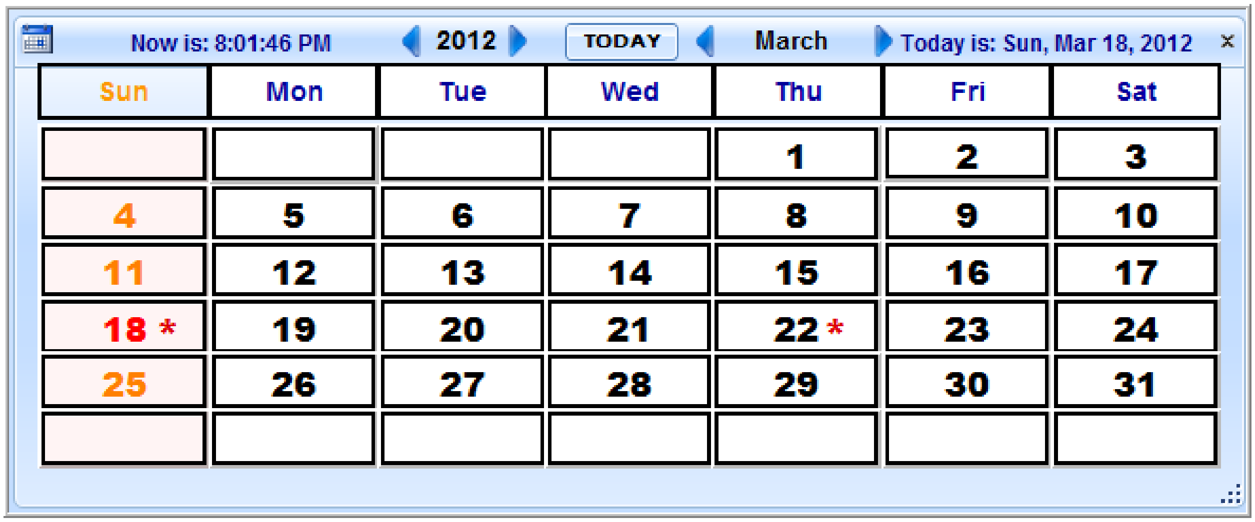
Enter in the ACTUAL DATE & TIME the task must be performed.



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



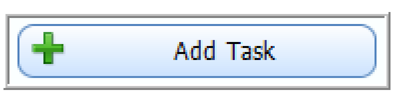
The calendar at the bottom of the Personal Agenda screen is used to let you select a date by clicking on the calendar days and see which dates have tasks based on its asterisk.

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.

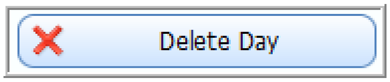


DELETING TASKS

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