

SideKick 365 CRM

Tour Guide



Version 1.0.0

8/23/2018

Created and Built in California by SkyLite Systems

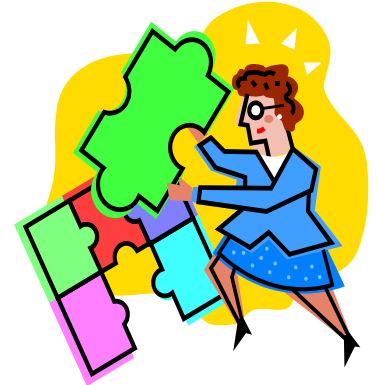
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Introduction

SideKick 365 CRM is the best business app you can buy for SharePoint. When you purchase SideKick 365 CRM, you get a best in class CRM solution that installs into SharePoint for a fraction of the cost of competing products. SideKick 365 CRM includes all of the following:

- Simple, efficient management of tens of thousands of Accounts, Contacts, Projects, and Opportunities along with their associated emails, files, scanned documents, Tasks, and Notes.
- Email reminders of important Notes you need to follow up on in Accounts, Opportunities, and Projects allowing easier management of your sales pipeline and projects.
- Tight integration with Microsoft Office and Outlook allowing simple uploading of important emails, Word files, Excel spreadsheets, PowerPoint slide decks, and OneNote notebooks into Accounts, Opportunities, and Projects.
- Bi-directional contact synchronization with Outlook.
- Outbound email campaigns
- Ability to “spread” the total value of an opportunity over many time months so you can enter a single Opportunity that has a recurring revenue stream or services that spread over many months
- Case and Lite Project Management once you close a sale so you can support your customers.
- A Product module to let you track products and labor on Opportunities and within Projects/Cases.
- Nearly unlimited customization to screens and modules using a CRM Manager (included with your purchase) using HTML and JavaScript.
- Support for scanning and saving into Accounts, Opportunities, and Projects/Cases.
- Support for all the capabilities of SharePoint (since it is built in SharePoint) such as custom views, workflow, management of templates using Content Types, Search, Filtering to name just a few.
- Mobile Interface built with PowerApps of the data is stored in SharePoint
- PowerBI Dashboard of data in SharePoint



This document will guide you through a demo SideKick 365 CRM running live in Office 365. It will give you a good overview of the capabilities and power of the app, but it really just scratches the surface. There is much more that can be done, so feel free to reach out to us if you have questions, ideas, or comments at info@SkyLiteSystems.Com.

Demo Site - Overview

The demo of SideKick 365 CRM includes 500 accounts, 500 contacts, and around 125 Opportunities. It also has a number of sample documents, scanned files, emails, Projects, Products, and Notes so you can see how all of these items are used to help you close more sales and manage your customers better.

This guide also includes a tour of the PowerApps interface and PowerBI dashboard that is also included with the SideKick 365 CRM solution – Note: The PowerApp, PowerBI, and Flow components of this solution are separate downloads from <http://www.AppSource.com>. Additional info on how to download these components is referenced in later sections within this guide.

Drop us a line at Info@SkyLitesystems.Com if you have questions or want to learn more.

Overview of the Tour

We will begin the demo looking at the SharePoint Interface. Next, will take a close look at PowerApps interface in section two. Finally, we will examine the PowerBI template in Section 3.

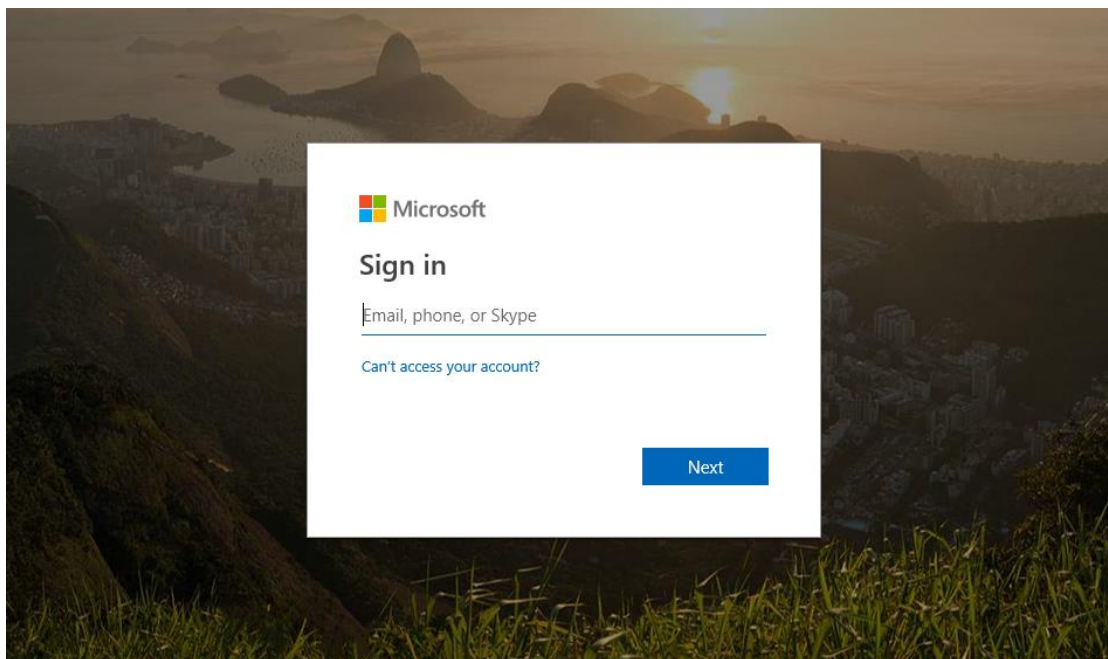
Let's get started with the SharePoint portion of this demo

NOTE – Please send us an Email to Info@skyLiteSystems.Com and we will send you the proper web address (url), user name, and password to log in to this demo

Logging in to the SharePoint Add-In Demo

We will begin the demo looking at the SharePoint add-in. Logging into the demo environment of SideKick 365 CRM in SharePoint is easy. Follow these simple directions

1. Copy this web address in your browser
2. When you see the log-in screen, type in
 - a. user name: **We will send you**
 - b. password: **We will send you**



Home Page

After typing the user name and password, you will be taken to the home page of the SharePoint SideKick 365 CRM demo site. The home page includes a list of open Tasks, Opportunities, Accounts, and Projects associated with a salesperson named Alan Steiner - the test user you logged in as. You see items “associated “ with Amy Adams because she and Alan share a security profile and they work together as a team. We will explain security profiles in more detail later in the demo, but hopefully you already starting to see how SideKick 365 CRM was built to support sales teams. You can double-click on any Title or Name column of any of the items shown in the lists on the home page to see more detailed information or to make edits to the item.

You will soon learn that the lists of Accounts, Tasks, and Opportunities are very powerful. You can select any of the headers in the lists to filter or sort as appropriate, and it they are easy to customize if you want to add columns or create subtotals and groups of similar items. Lets’ take a look...

1 – Mouse over the header called “Account” in the Opportunities list and you will notice a small triangle appear to the right of “Account”. Try selecting the triangle with a single click and you will see a number of options appear...

The screenshot shows the SideKick 365 CRM interface. On the left is a navigation menu with categories like Leads, Accounts, Opportunities, etc. The main area displays two tables: 'My Open Tasks' and 'My Open Opportunities'. The 'My Open Opportunities' table has columns for Title, Amount, Probability, Expected Close Date, Account, and Contact. A red arrow points to the 'Account' header in this table, which has a small downward-pointing triangle next to it. Below the tables is an 'Accounts' section with a 'new item' button and a search bar.

Task Name	Task Status	Due Date	Account	Opportunity	Project
Review Wilson High Proj Plan with Bobby	In Progress	September 28	A B C Lock & Key	Wilson High - Lockers 1500	
Invite Lyndon - Open House	In Progress	October 26	A B C Lock & Key		

Title	Amount	Probability	Expected Close Date	Account	Contact
Opp 7244	\$8,200.00	10	10/1/2018	Perkins Photo Graphics Inc	Minh Leclare
Opp 606	\$13,000.00	10	10/1/2018	Postal Place At 111th Square	Hans Carlan
Opp 308	\$2,750.00	10	10/1/2018	Reliable Optical	Jasmin Gum
Opp 861	\$810.00	60	10/1/2018	Fox and Killbride	Vernon Engelman
Opp 636	\$556.00	25	10/1/2018	Wyckoff Florist and Gifts	Lana Garrigus
Opp 426	\$1,900.00	10	10/1/2018	Tile City and Carpet Of Pa	Delmer Delucas
Opp 307	\$5,350.00	25	10/1/2018	Currier Gallery Of Art	Alejandro Mascall
Opp 179	\$2,200.00	10	10/1/2018	Brickman Arthur Cpa	Bryan Rovell
Opp 272	\$498.00	60	10/1/2018	Guy Spradling	Antony Thierauf
Opp 150	\$3,270.00	60	10/1/2018	Tweedy Penney and Crawford	Sandra Mcaulay

2 – After you select the little triangle, you will notice that you can filter the list to see opportunities related to an account. Let’s try this, select the check box next to “ABC Lock & Key” in the list of accounts and then click anywhere outside of the filter...



Create New

...

Leads

Accounts

Opportunities

Spread

Projects

Contacts

Tasks

Notes

Documents

Categories

Products

Campaigns

Campaign Groups

Profiles

Sales People

Sales Goals

Sales Stages

Search this site

My Open Tasks

Task Name	Task Status	Due Date	Account	Opportunity	Project
Review Wilson High Proj Plan with Bobby	In Progress	September 28	A B C Lock & Key	Wilson High - Lockers 1500	
Invite Lyndon - Open House	In Progress	October 26	A B C Lock & Key		

My Open Opportunities

Title	Amount	Probability	Expected Close Date	Account	Contact
Opp 7244	\$8,200.00	10	10/1/2018	A B C Lock & Key	Minh Le
Opp 606	\$13,000.00	10	10/1/2018	A B C Lock & Key	Hai Carlan
Opp 308	\$2,750.00	10	10/1/2018	A B C Lock & Key	Jasmin Gum
Opp 861	\$810.00	60	10/1/2018	A B C Lock & Key	Vernon Engelman
Opp 636	\$556.00	25	10/1/2018	A B C Lock & Key	Lana Garrigus
Opp 426	\$1,900.00	10	10/1/2018	A B C Lock & Key	Delmer Delucas
Opp 307	\$5,350.00	25	10/1/2018	A B C Lock & Key	Alejandro Mascall
Opp 179	\$2,200.00	10	10/1/2018	A B C Lock & Key	Bryan Rovell
Opp 272	\$498.00	60	10/1/2018	A B C Lock & Key	Antony Thierauf
Opp 150	\$3,270.00	60	10/1/2018	A B C Lock & Key	Sandra McAulay

Accounts

+ new item

Current View ... Find an item

3 – Notice that this now applies a filter to the list of Opportunities so now all you see are Opportunities associated with the account “ABC Lock & Key”

TIP – You can select more than 1 account name in the list and the filter will be applied ...

4 – Now select the header column called “Account” in the filtered Opportunities list again with a single click. This activates a list of options for filtering and sorting again. This time, select the “Clear Filters from Account” option and click anywhere outside the list of options that you activated by clicking on the triangle. This clears the filter for “ABC Lock & Key” and now all accounts are shown again.

5 – Now start exploring on your own. Mouse over the header called “Account” in the Opportunities list again and select the small triangle appear to the right of “Account”. Try selecting the sorting options or other filter options. Next, try “mousing” over other headers in the list of Opportunities and investigate how you can sort and filter each of these columns in the list.

6- OK – let’s try another list. Select the Account Module and try “mousing” over some of the headers like “Title” and “Owner” and you will learn that you have the similar options to the options you saw in the Opportunities list. As you dig in deeper, you will see that SideKick 365 CRM is smart enough to only show filter options based upon the data that is available to you based upon your login credentials and the security groups that have been set up.

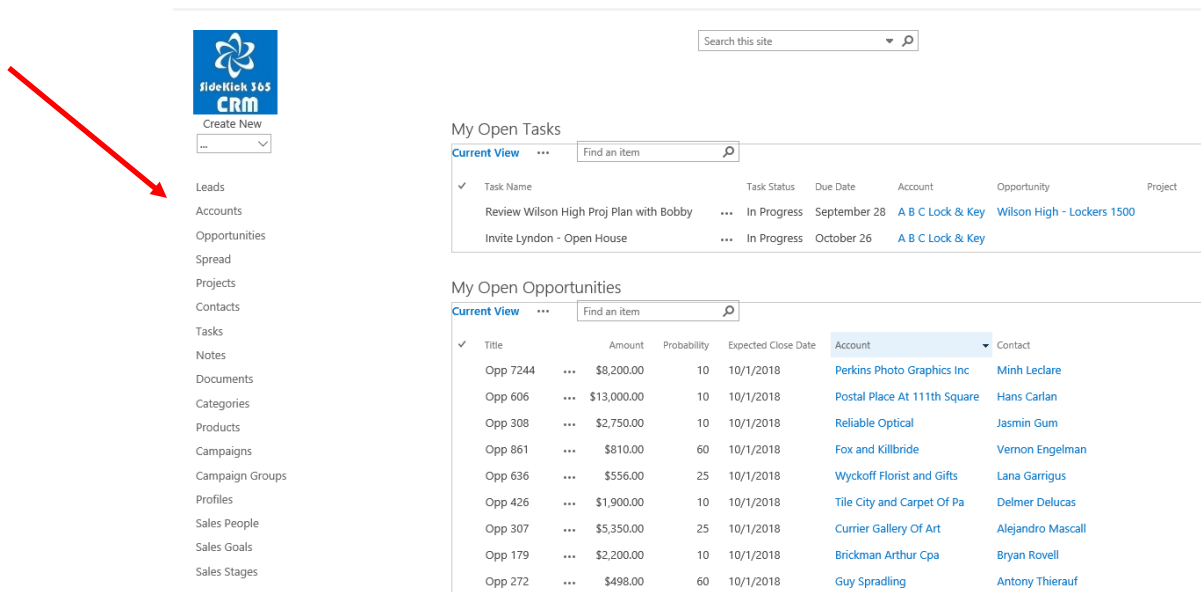
TIP – The headers in all lists in SideKick 365 CRM are very powerful. You can use them to sort and filter lists throughout SideKick 365 CRM.

Quick Launch Links to Modules

Now let's look at the quick launch items in the left-hand side of the page. These links are used to navigate between different modules in the SideKick 365 CRM. Selecting any of the links will instantly transport you into the module named in the quick launch link. Try picking a few links like Contacts or Projects to see how they work.

Do you see the blue logo with the swirl pattern in the upper left of the screen? This is a quick link back to the home page. You can always navigate back to the home page by selecting the SideKick 365 CRM logo anytime you see it. Try selecting the "Accounts" quick launch link and then select the blue SideKick 365 CRM logo and you will return to the home page.

Tip – Quick launch links are always in the left-hand gutter of the page and are used to navigate between modules in SideKick 365 CRM



The screenshot displays the SideKick 365 CRM interface. On the left is a navigation menu with the SideKick 365 CRM logo at the top, followed by a 'Create New' button and a dropdown menu. Below these are various module links: Leads, Accounts, Opportunities, Spread, Projects, Contacts, Tasks, Notes, Documents, Categories, Products, Campaigns, Campaign Groups, Profiles, Sales People, Sales Goals, and Sales Stages. A red arrow points to the logo. The main content area features a search bar at the top right. Below it are two sections: 'My Open Tasks' and 'My Open Opportunities', each with a search bar and a table of data.

Task Name	Task Status	Due Date	Account	Opportunity	Project
Review Wilson High Proj Plan with Bobby	In Progress	September 28	A B C Lock & Key	Wilson High - Lockers 1500	
Invite Lyndon - Open House	In Progress	October 26	A B C Lock & Key		

Title	Amount	Probability	Expected Close Date	Account	Contact
Opp 7244	\$8,200.00	10	10/1/2018	Perkins Photo Graphics Inc	Minh Leclare
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Opp 307	\$5,350.00	25	10/1/2018	Currier Gallery Of Art	Alejandro Mascall
Opp 179	\$2,200.00	10	10/1/2018	Brickman Arthur Cpa	Bryan Rovell
Opp 272	\$498.00	60	10/1/2018	Guy Spradling	Antony Thierauf

Dropdowns

Notice the dropdown within the quick launch portion of the page. The “Create New” dropdown is used to make a new item within various modules like Accounts and Opportunities in SideKick 365 CRM. Let’s give it a try.

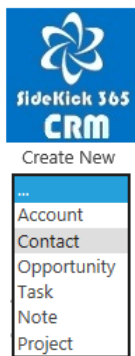
1 - Select the down arrow in “Create New” drop down.

2 - Now select the word “Account”. This will transport you to the New Account screen.

3 – You will notice that the “Create New” drop down is not available when you are creating a new item in SideKick 365 CRM. To exit the new account screen, you can enter in some data and hit “Save”, or you can hit the “Cancel” button. You can also select the SideKick 365CRM logo or any of the quick launch links.

Tip – You have to hit the Save button to save any data in the “New” screens in the modules. Selecting the SideKick 365 CRM logo or any quick launch link does not save any data in the new item screen.

4 – Now try creating some other new items using the “Create New” drop down. You will see it is easy and intuitive.



Walking Through the Modules

SideKick 365 CRM is a great way to manage your Accounts, Opportunities, Contacts, and Projects / Cases. You can also synchronize Contacts with Outlook and create some simple outgoing email campaigns. Let's spend some time walking through some of the modules and capabilities in SideKick 365 CRM to see what's possible. We'll start with the Accounts

Account Module

- 1 - Try selecting the quick launch link to the Accounts Module and you will see a list of Accounts.
- 2 - Click on the Title of the Account – “ABC Lock & Key” as shown below.

The screenshot shows the SideKick 365 CRM interface. On the left is a navigation menu with options like Leads, Accounts, Opportunities, Spread, Projects, Contacts, Tasks, Notes, Documents, Categories, Products, Campaigns, Campaign Groups, Profiles, Sales People, Sales Goals, and Sales Stages. The 'Accounts' module is selected. The main area displays a table of accounts with columns for Title, Account ID, Account Type, Salesperson, Phone, Contact, Parent, Territory, and Profile. The first row, 'A B C Lock & Key', is highlighted in blue, and a red arrow points to its title. Other accounts listed include 'A Limousine Service', 'ABC Wood Supplies', 'Ace Pro Pest Cntrl Inc', 'Action Remediation Co', 'Air Academy Federal Credit Un', 'Airlifter', 'Albers Technologies Corp', 'Allegro Copy and Print', 'Anderson Independent Mail', 'Andow Personnel Services', 'Asher Ronald L Md', 'Atlas Metal Cutting Inc', 'Audiotek Electronics', and 'Barco Chromatics Inc'.

3 – Clicking on the name of the account activates the detail screen associated with that account. This screen has all of the relevant information about the account and gives you a convenient way to store related information like opportunities and projects associated with the account, tasks, contacts, documents, and notes.

4 – When you open “ABC Lock & Key” detail screen, you will notice the items listed along the top of the screen including Opportunities , Tasks , Notes , Notes, Documents, Contacts, and Projects. These are called quick links and they make it easy to add and view items that are associated with “ABC Lock & Key”.

Tip – Wait until a moment before you click on any of these links. It takes a moment for SideKick 365 CRM to look up the associated files referenced in each link. If you accidentally click before they load don't worry, you will see a list of all items of this type. Not to worry, just click on the blue “S” to get back to the home page.



- Leads
- Accounts
- Opportunities
- Spread
- Projects
- Contacts
- Tasks
- Notes
- Documents
- Categories
- Products
- Campaigns
- Campaign Groups
- Profiles
- Sales People
- Sales Goals
- Sales Stages

Account Edit Opportunities Tasks Notes Documents **Contacts** Projects

Name * A B C Lock & Key **Type** Customer

Parent [dropdown] New **Filter** [input] Apply

Account ID 23090 **Salesperson** Alan Steiner

Phone 415-705-1956 **Fax Number** 415-705-2887

Web Site http://www.ABCLock&Key.com **Hot**

Address 200 California St

City San Francisco **State** CA

Zip Code 94111 **Country** USA

Billing Address same as physical **Territory** Enterprise

General Info ABC Lock and Key is a full service locksmith and contracting company. They can manage large jobs and work with many local school districts. I edited this.

Contact Lyndon Bellerdine [dropdown] New **Filter** [input] Apply

Campaign Spring Fling - Redmond **Profile** Alan_S_Profile

Notes

Type	Title	Notes	Follow Up Date	Email
Phone Call	Lyndon Called - Wilson High	7-30-18 Lyndon called about the Wilson High job. Says he has a good chance and will need help. Winter Break 2018	10/12/2018	AlanS@skylitesystems.com
To Do	8-1-18 As Lyndon about Stacey	Ask Lyndon if Stacey would like to come an work with us on a full time basis.	08/29/2018	DaveC@skylitesystems.com
To Do	Call Lyndon - RE Golfing	8-1-18 Call Lyndon and invite him to the Golf Outing in October	08/17/2018	AlanS@skylitesystems.com

*Tip – You can navigate to items related to an item in any of the modules by selecting any of the quick links listed in **blue** at the top of the detail screen for that item.*

Tip – Items in quick links can also be viewed by navigating to the appropriate module in the system and using a filter. You can also find them using Search capabilities as needed when you are not within a detail item in SideKick 365 CRM.

Let’s see how the quick links at the top of the account detail screen work.

5 –Select the Documents link at the top of the Account detail screen. This will transport you to a screen that lists of documents related to ABC Lock and Key as shown in the screenshot below.



Create New

- Leads
- Accounts
- Opportunities
- Spread
- Projects
- Contacts
- Tasks
- Notes
- Documents
- Categories
- Products
- Campaigns
- Campaign Groups
- Profiles
- Sales People
- Sales Goals
- Sales Stages

Search this site

Account Edit Opportunities Tasks Notes **Documents** Contacts Projects

Account Name: A B C Lock & Key Account ID: 23090
 Salesperson: Alan Steiner Account Type: Customer

+ New Upload Sync Share More

Current View Find a file

Name	Modified	Modified By	Category
10 Hours Consulting_Opportunity632	August 11	Alan Steiner	
ABC Lock and Key - Wilson High - 25 3 Inch locks_Opportunity654	About an hour ago	Dave Chennault	
Wilson High - Lockers 1500_Opportunity627	July 31	Dave Chennault	
1134_RE Scanner	July 31	Dave Chennault	Email
1150_Link to Mark Twain record	5 days ago	Alan Steiner	Email
Brown Safe Vault door	July 31	Dave Chennault	Schematic
Oppties	5 days ago	Alan Steiner	Technical Specification

Drag files here to upload

TIP - You can open any of the files shown in documents list the by double-clicking on any of their file names. Try it...

Tip - If the file type cannot be opened in your browser, then you can download the file and open on your local device

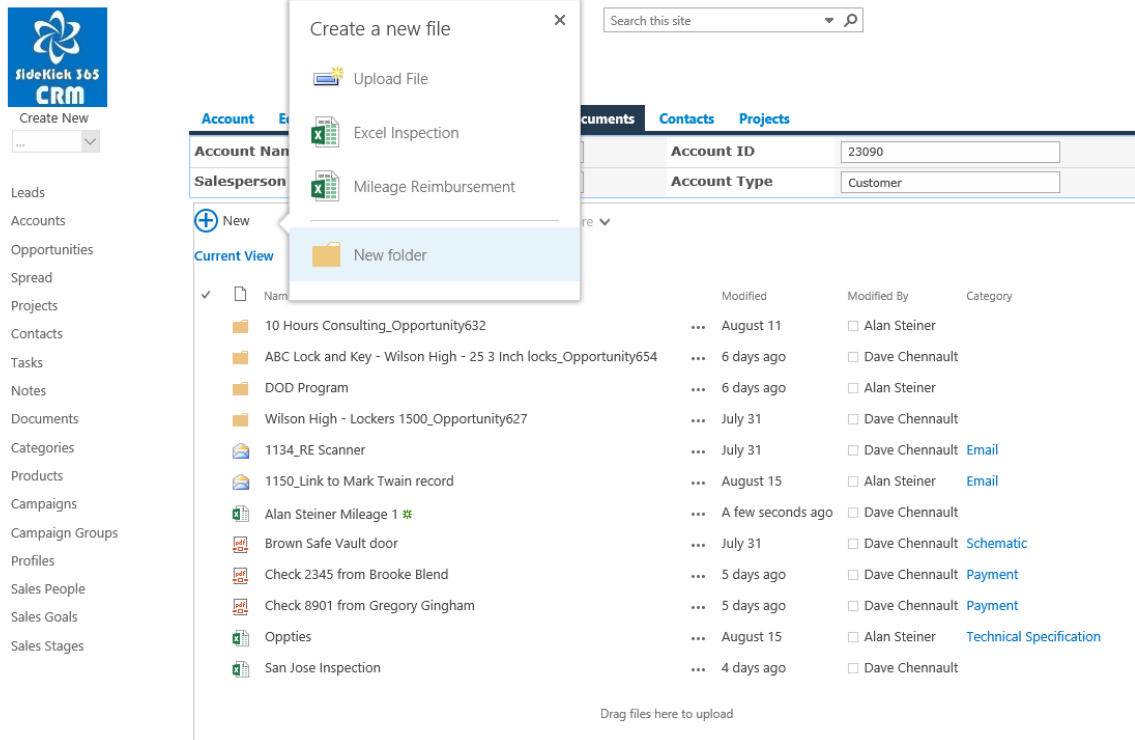
Tip – You can create a folder and group files within that folder. If you open a folder, just hit the Documents tab to get back to the main Documents view within the Account, Opportunity, or Project.

Folders in the list of Docs

Notice the list of documents also contains a folder called “DOD Lock Program Overview”. You can set up folders within the document list in Accounts, Opportunities, or Projects so you can organize documents as required ... you are not limited to a single long list of files!

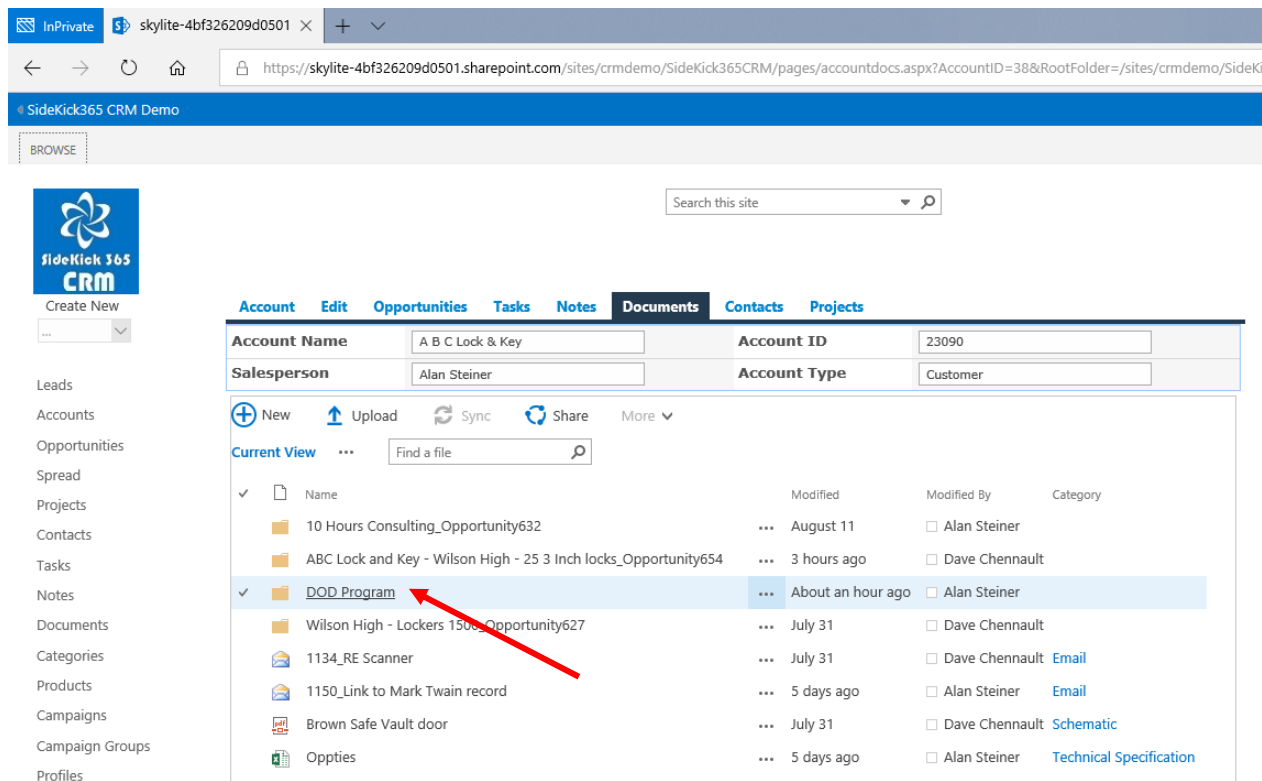
SideKick 365 CRM also creates a folder for any Opportunity associated with the account. This way, you can easily distinguish any documents associated with an account or an Opportunity associated with that account. You can also create folders as needed to help organize files associated with an item.

Go ahead and click on the “New” link above the list of Documents and Folders and you will be given the option to create a folder or upload a file as shown below.

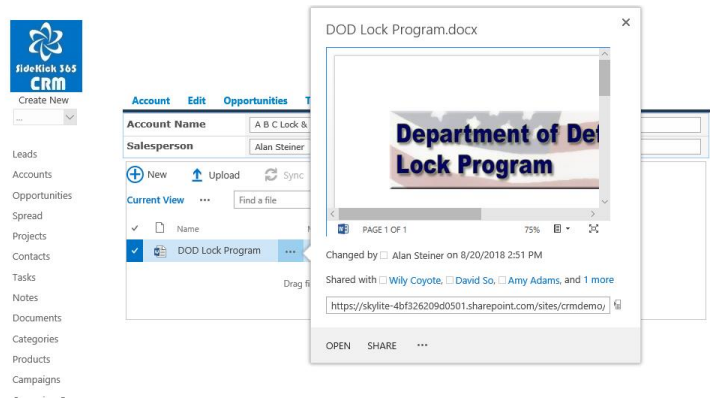
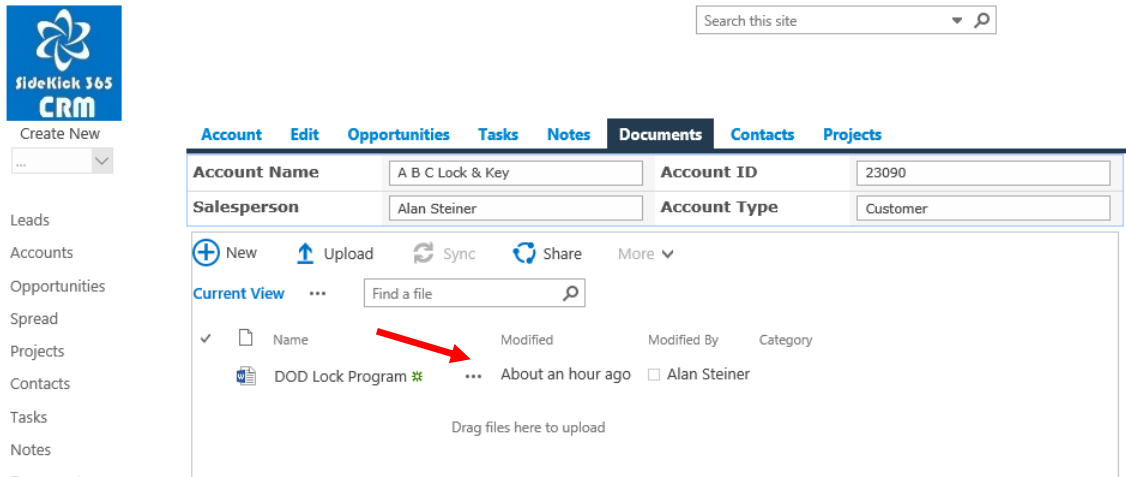


Let's see folders in action and how they can be used within the documents tab.

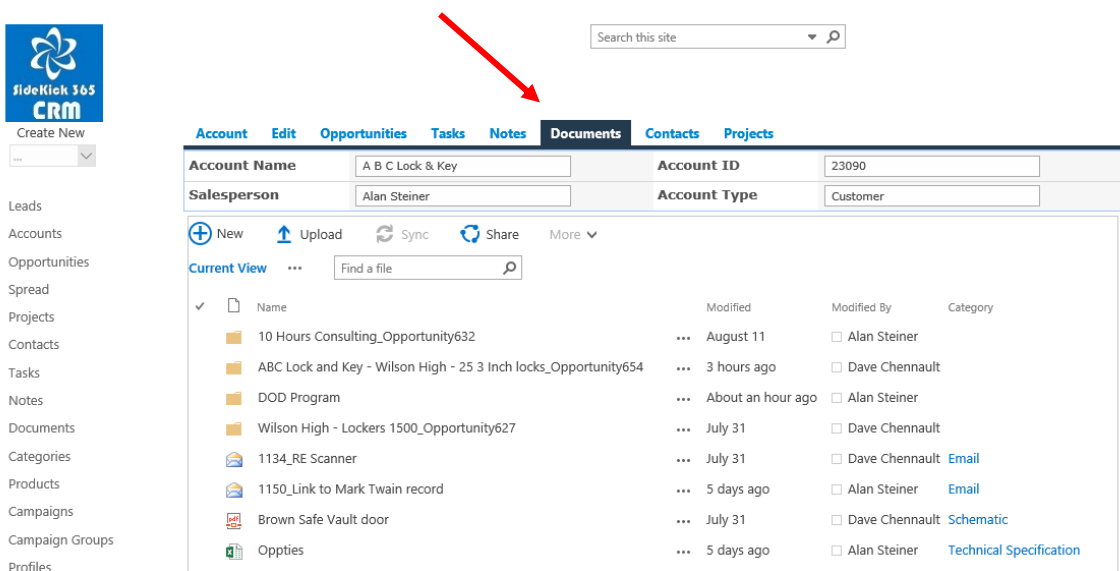
1. Open the "DOD Lock Program" folder in the Doc listing in ABC Lock and Key by selecting the folder name.



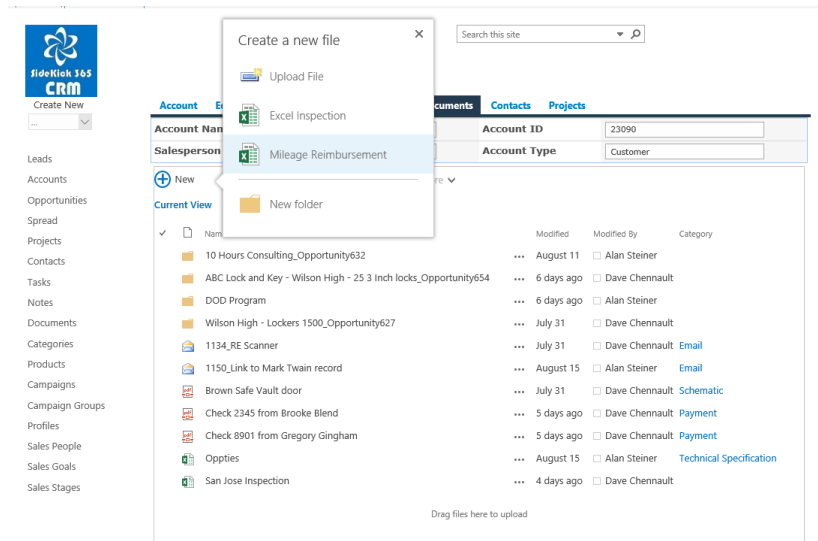
- When the folder opens, you will see it has one Word file loaded into that in the folder. You can click on the three dots next to the name of the word file to see a preview.



- Now click on the Documents tab at the top of the screen to return to the main document tab of ABC Lock & Key.



4. Create your own folder by selecting the New link at the top of the Document listing tab screen



- 5. Go ahead and name it and add a files if you'd like
- 6. You can drag files from the main list of docs into a folder. You can also rename them at any time – thanks SharePoint Team! Now you are starting to see the power of building SideKick 365 CRM on top of SharePoint 😊. You get all the power of SharePoint packaged within a great CRM app.

TIP – When you first open an Account or a quick launch within a module, give SideKick 365 CRM a moment to update the links behind each quick launch or to insert the header. You may notice a slight delay while a screen is assembled within the app depending upon your internet connection speed and the power of the device accessing SideKick 365 CRM.

6 - You can upload a file or create a document from a template by selecting the “Upload File” link above the list of documents. You will notice the demo includes and an Excel Template.

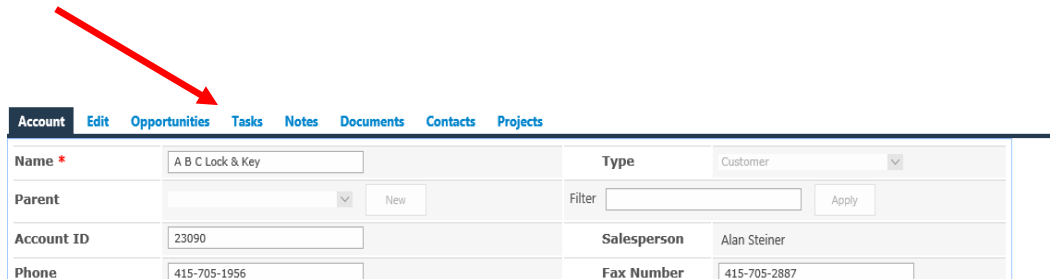
Notice the excel templates? We explain how to use a template in next section of this guide, and we show you how to install these templates in the Appendix of this guide.

7 - You can also sort or filter the list as needed by selecting the header item as described within the Home page section of this manual. Let’s try it - select the word Account just above the solid black line to return to the main Account screen.

8 – Try and investigate the other related items like Notes, Contacts, Tasks, Opportunities or Projects. Just click on any of the links at the top of the screen to quickly navigate to that list.



- Leads
- Accounts
- Opportunities
- Spread
- Projects
- Contacts



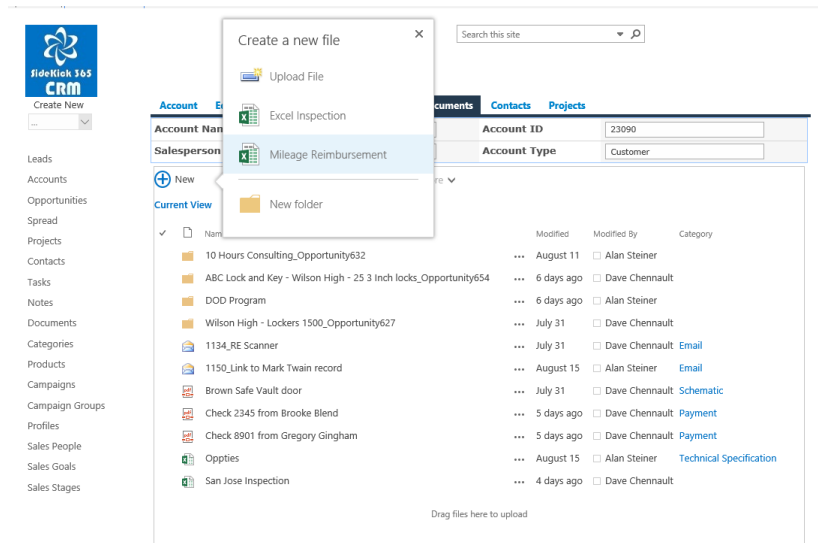
A Word about Using Content Types for Templates In SideKick 365 CRM

SharePoint is a powerful platform, and our decision to build SideKick 365 CRM on top of SharePoint has proven to be a very good choice. The ability to leverage templates is another great reason to use SideKick 365 CRM. Let's take a close look.

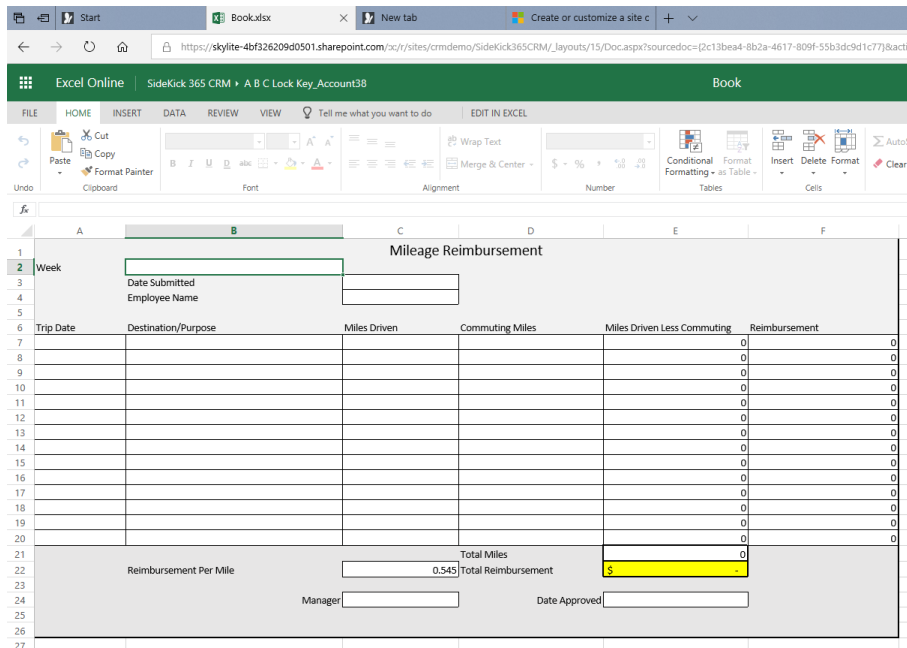
Using a Content Type as a template to great way to quickly turn a Word, Excel, PowerPoint or OneNote File into an electronic form that can be used by all SideKick 365 CRM Users. We created a Mileage Reimbursement form for the Demo by building an Excel spreadsheet with the fields and formula we wanted. We then locked all the cells that were not used for collecting information for the user and protected the spreadsheet using native Excel capabilities. Finally, we used the spreadsheet as a basis of a Content Type in the Documents within SideKick to quickly create a standard mileage reimbursement form. We could easily add a Flow Workflow to collect approvals as needed.

To see this work in action, follow the steps below.

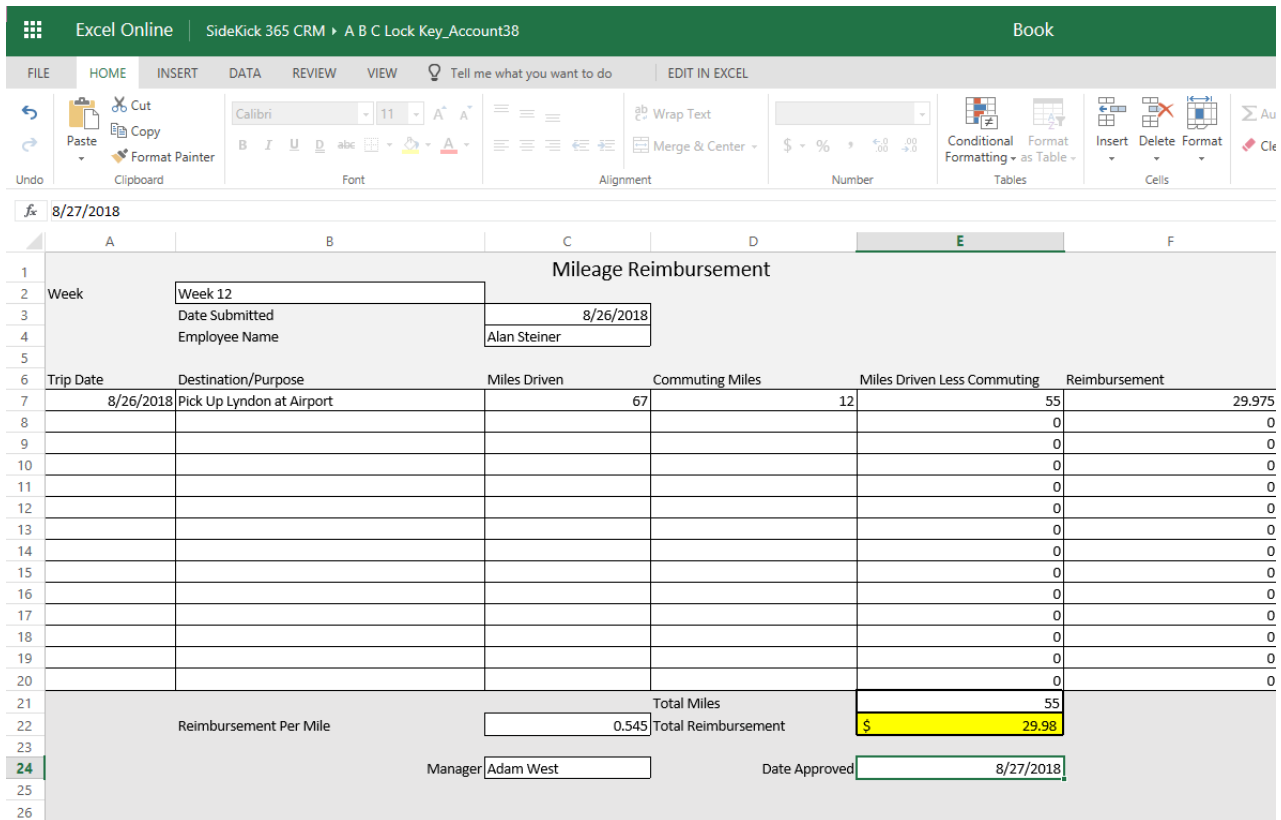
Step 1 - Select The New Option in the Docs Tab of ABC Lock and Key



Step 2 – Select the Mileage Reimbursement Content Type template. This will activate a blank Mileage Reimbursement form (this is a Content Type made from an Excel Spreadsheet)

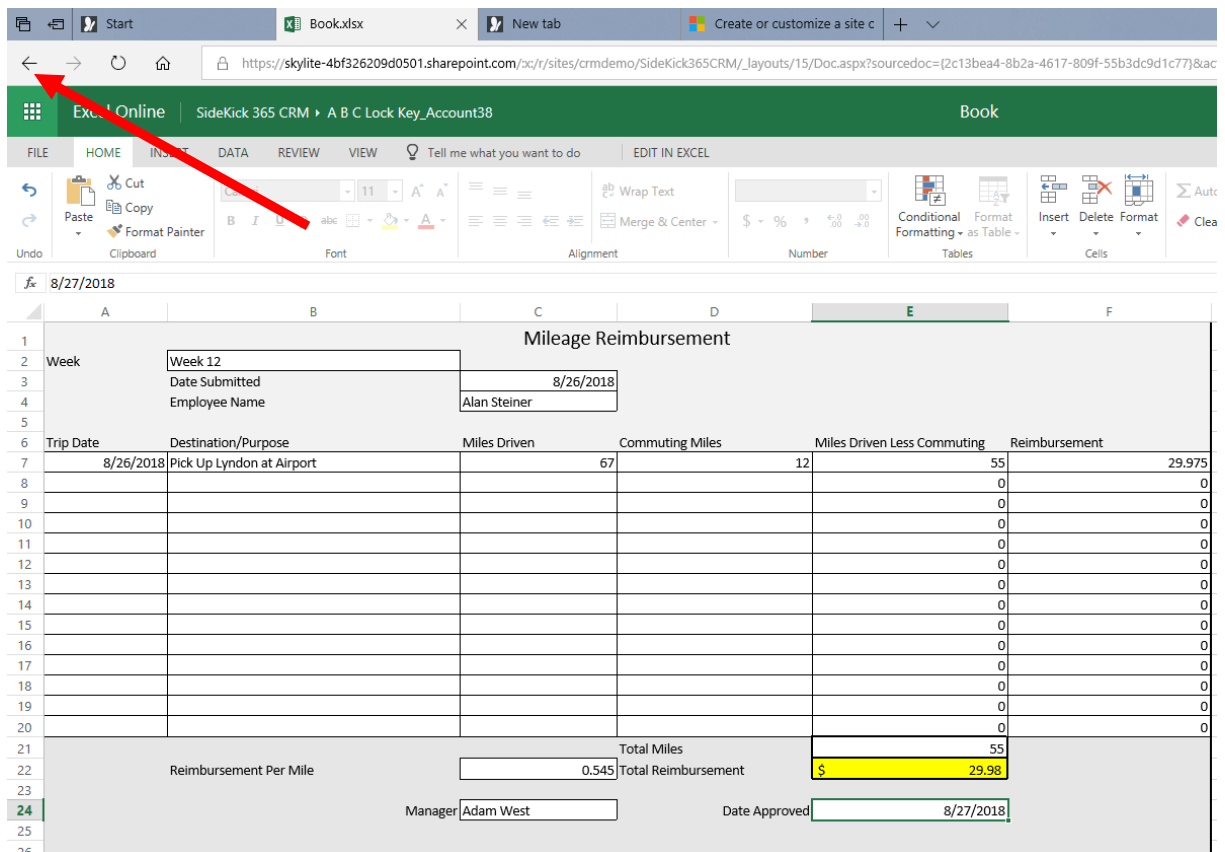


Step 3 – Fill it out with some data. NOTE - The Spreadsheet saves automatically – you don't need to hit save!



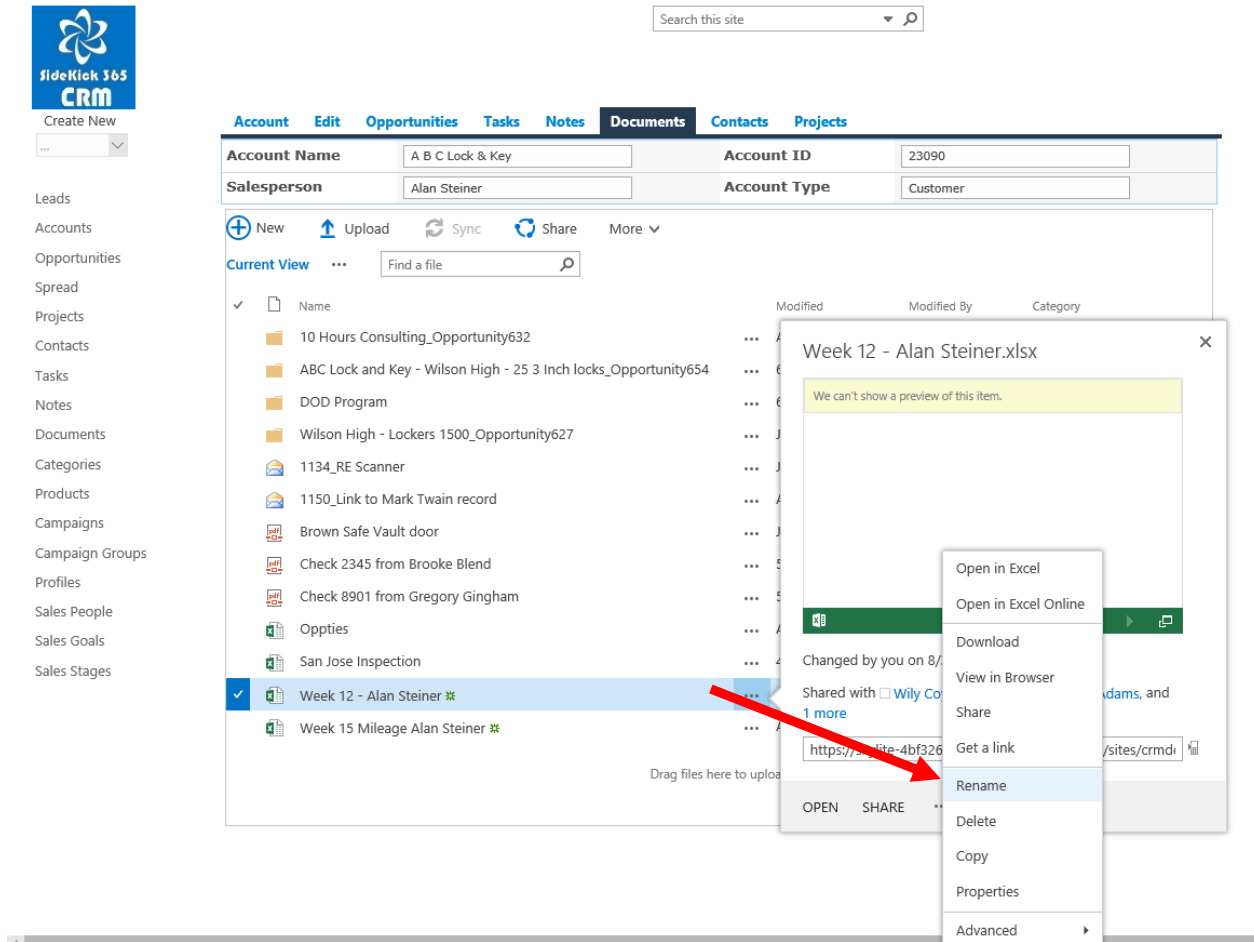
Mileage Reimbursement					
Week	Week 12				
Date Submitted	8/26/2018				
Employee Name	Alan Steiner				
Trip Date	Destination/Purpose	Miles Driven	Commuting Miles	Miles Driven Less Commuting	Reimbursement
8/26/2018	Pick Up Lyndon at Airport	67	12	55	29.975
				0	0
				0	0
				0	0
				0	0
				0	0
				0	0
				0	0
				0	0
				0	0
				0	0
				0	0
				0	0
				0	0
				0	0
				0	0
				0	0
				0	0
				0	0
Reimbursement Per Mile		0.545	Total Miles	55	
			Total Reimbursement	\$	29.98
Manager		Adam West		Date Approved	8/27/2018

Step 4 – Hit the “Back Arrow” in the browser when you are done entering data



Mileage Reimbursement					
Week	Week 12				
Date Submitted	8/26/2018				
Employee Name	Alan Steiner				
Trip Date	Destination/Purpose	Miles Driven	Commuting Miles	Miles Driven Less Commuting	Reimbursement
8/26/2018	Pick Up Lyndon at Airport	67	12	55	29.975
				0	0
				0	0
				0	0
				0	0
				0	0
				0	0
				0	0
				0	0
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				0	0
				0	0
Reimbursement Per Mile		0.545	Total Miles	55	
			Total Reimbursement	\$	29.98
Manager		Adam West		Date Approved	8/27/2018

Step 5 – Rename the file with the desired name using the Rename Dropdown for that new file (form)



See the Appendix of this guide to learn how to add a new form using Word, Excel, PowerPoint, or OneNote template (file) using a Content type.

Now that we have learned a little about the Accounts module, let's move on and learn how the Opportunities module works.

Adding a New Opportunity

It is easy to add an Opportunity to SideKick 365 CRM. Let's see how...

1 - Select "Opportunity" under the Create New dropdown



- Leads
- Accounts
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- Sales Stages

Opportunity *	<input type="text"/>	<input type="checkbox"/> Closed	Outcome	<input type="text"/>
Status	<input type="text"/>	<input type="checkbox"/> Hot	Salesperson *	<input type="text" value="Alan Steiner x"/>
Amount	<input type="text"/>		Probability, %	<input type="text"/>
Weighted Value	<input type="text"/>		Territory	<input type="text"/>
Account *	<input type="text"/>	<input type="button" value="New"/>	Filter	<input type="text"/> <input type="button" value="Apply"/>
Contact	<input type="text"/>	<input type="button" value="New"/>	Filter	<input type="text"/> <input type="checkbox"/> Company <input type="button" value="Apply"/>
Expected Close *	<input type="text"/>		Close Date	<input type="text"/>
Profile	<input type="text"/>		Category	<input type="text"/>
Campaign	<input type="text"/>		Sales Status Date	<input type="text"/>
Comments	<input type="text"/>			
Reason	<input type="text"/>			

2 – Start filling in the appropriate values in each field. Remember that the fields with a red star (*) are required.

3 – You must associate the Opportunity with an Account. Use the "Select" button next to Account to pick an Account.

4 – When the Account list is activated, select "ABC Lock &Key" by selecting anywhere on the line where it is listed.

5 – Now select the OK button at the bottom of the screen showing accounts to add that Account to the Opportunity.

6 – Next, let's add a Main Contact. Hit the Select button next to the Main Contact Field

7 – This will activate a list of all Contacts. Go ahead and select a contact you want to associate with the Opportunity and then hit the OK button. – Notice the (+) sign next to the select button – select it and you will see detailed contact info.

8 – Select a security profile if you want to limit who can see the Opportunity – see the Security section of this document to learn more about security and security profiles.

9 – Select the Save button on the new Opportunity screen to save the Opportunity you just created!

Now that you have saved the Opportunity, you can start to add in Notes and Items to that Opportunity. Let's take a closer look at these items.

Notes in an Opportunity

The Notes in the Notes Grid are very powerful. You can add Notes to a Project, Account, or Opportunity or they can be stand-alone. Notes have a reminder data so you send an email with a link to the Note that will remind the recipient to do something and check back in!

It is easy to add a Note, just open an Opportunity and click on the plus sign next to the word Notes to open the Notes grid, then click on the green plus sign to add a note.



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- Sales Stages

Account Opportunity Edit Tasks Notes Documents Contacts Projects

Opportunity *	100 Padlocks	<input type="checkbox"/> Closed	Outcome	
Status	3-Presentation	<input type="checkbox"/> Hot	Salesperson *	Alan Steiner
Amount	799.00		Probability, %	25
Weighted Value	199.75		Territory	West
Account *	Cat Claw Designs	<input type="button" value="New"/>	Filter	<input type="text"/> <input type="button" value="Apply"/>
Contact	Amaie Feline	<input type="checkbox"/> <input type="button" value="New"/>	Filter	<input type="text"/> <input type="checkbox"/> Company <input type="button" value="Apply"/>
Expected Close *	10/31/2018		Close Date	
Profile	Alan_S_Profile		Category	Product
Campaign			Sales Status Date	08/14/2018
Comments	Good Opportunity for us. Keep working.			
Reason				

Notes

Type	Title	Notes	Follow Up Date	Email
<input type="checkbox"/> <input type="button" value="New"/> <input type="button" value="Delete"/>	Phone Call	8-14-2018	Good call with Amaie	09/28/2018 AlanS@skylitesystems.com

Items

You will see the option to add Notes if there are no Notes in the Opportunity. The Notes Grid will automatically be open if there are any Notes already associated with the Opportunity.

Notes

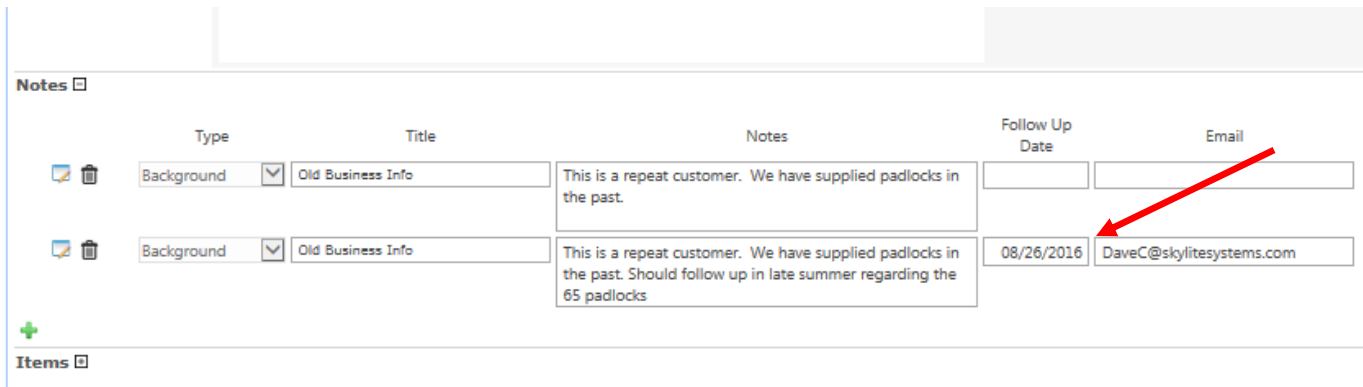
Type	Title	Notes	Follow Up Date	Email
<input type="checkbox"/> <input type="button" value="New"/> <input type="button" value="Delete"/>	Background	Old Business Info	This is a repeat customer. We have supplied padlocks in the past.	
<input type="checkbox"/> <input type="button" value="New"/> <input type="button" value="Delete"/>	Background	Old Business Info	This is a repeat customer. We have supplied padlocks in the past. Should follow up in late summer regarding the 65 padlocks	08/26/2016 DaveC@skylitesystems.com

Items

You'll also notice there are icons next to each not so you can save a new Note and edit or delete an existing Note. You can also easily update the Type dropdown in Notes so you can easily track a Note.

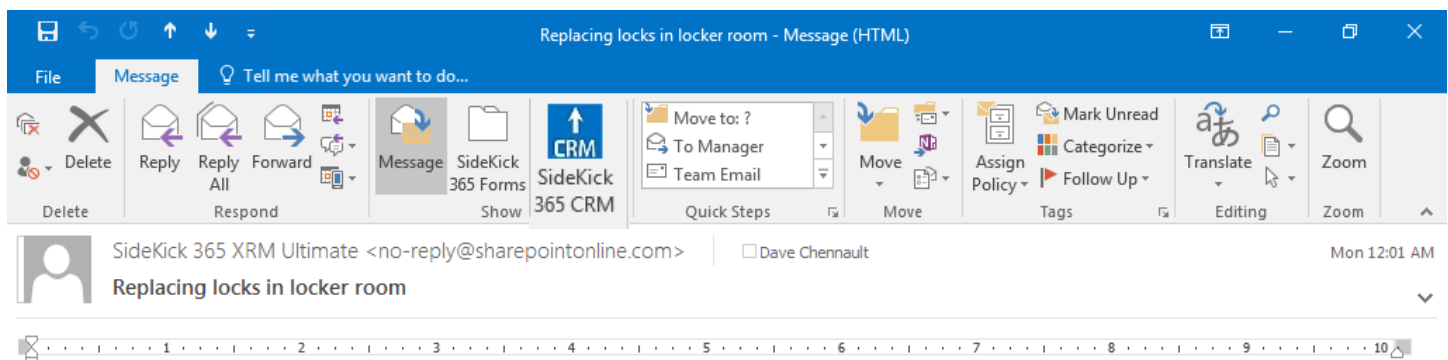
Email Reminder

You can create an email reminder by entering a date and a valid email address. Once these have been added to the Note, an email will be sent to the user or group reminding them to check the Note. The email also contains a link back to the Note so they can go into SideKick 365 CRM to update the Note or Account, Opportunity or Project associated with that Note.



Type	Title	Notes	Follow Up Date	Email
Background	Old Business Info	This is a repeat customer. We have supplied padlocks in the past.		
Background	Old Business Info	This is a repeat customer. We have supplied padlocks in the past. Should follow up in late summer regarding the 65 padlocks	08/26/2016	DaveC@skylitesystems.com

Here is a sample of the reminder email that is sent at one minute past midnight on the date you set in the reminder so it is available first thing in the morning.



There are several locks at Madison High that should be replaced in eh boys locker room. Some are padlocks while other require a key.

Click [here](#) to open the note.

Items in an Opportunity

The Items in the Items Grid within an Opportunity are used to list products - associated with that Opportunity. Products can be items or labor or anything else you can imagine. The Items module gives you tremendous flexibility to set up Opportunities as YOU need them. Items reference products, so make sure to set up the products you need and then reference them within Opportunities.

It's easy to add an Item, just open an Opportunity and click on the plus sign next to the word Items to open the Items grid, then click on the green plus sign to add an Item. Hit the little disk icon to save a new item, and hit the Edit or trash can to edit or delete an existing Item.

Revenue “Spread” in an Opportunity

While some Opportunities involve only one transaction, many customers have sales opportunities that include payments over several weeks, months, or even years. SideKick 365 CRM includes the ability to “spread” transactions or payments over many periods within a single Opportunity.

Each item entered in Spread grid is automatically given a date code behind the scenes (called Month) that is based upon the date field entered in the Spread line item. The date code contains the month and year so you can easily create pipeline revenue projections even if the Opportunity is spread over several periods of time with many different streams of payment amounts. Note – quarterly projections can be created by selecting date codes that contain specific months.

The ability to spread payments over any number of time periods is very powerful because you don’t have to enter an Opportunity each time a payment is projected for a given opportunity - this is a big time saver. Let’s take a closer look...

Here is how to “spread” an opportunity across many periods of time:

- 1 - To spread transactions across several periods, enter in the basic information about an Opportunity and then hit the Save button.
- 2 – Once the Opportunity is saved, you will see several new grids available at the bottom of the Opportunity including Spread. Go ahead and expand Spread by clicking on the little plus (+) and then use the green plus sign to add a new spread enter.
- 3 – Enter a date and amount then hit the disk icon to save it.
- 4 – You can edit and existing entry by hitting the icon of the pencil and you can delete any by hitting the icon of the trash can.

5 – When you have completed spreading the projected payments, hit the button called Set Amount next to total of all spread entries and that total amount will be copied into the Amount field of the Opportunity as shown below.



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Account Opportunity Edit Tasks Notes Documents Contacts Projects

Opportunity * 100 Padlocks Closed Outcome

Status 3-Presentation Hot **Salesperson *** Alan Steiner

Amount 799.00 **Probability, %** 25

Weighted Value 199.75 **Territory** West

Account * Cat Claw Designs Filter

Contact Amaie Feline Filter **Company**

Expected Close * 10/31/2018 **Close Date**

Profile Alan_S_Profile **Category** Product

Campaign **Sales Status Date** 08/14/2018

Comments Good Opportunity for us. Keep working.

Reason

Notes

Items

Spread

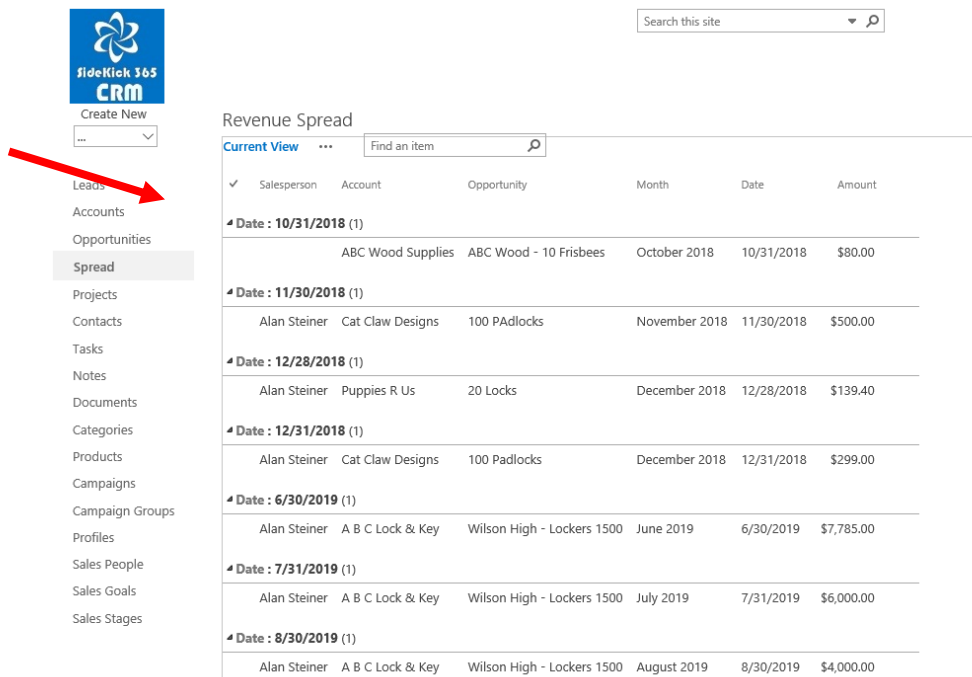
	Date	Amount
<input type="button" value="Add"/> <input type="button" value="Delete"/>	11/30/2018	500.00
<input type="button" value="Add"/> <input type="button" value="Delete"/>	12/31/2018	299
<input type="button" value="Add"/> <input type="button" value="Delete"/>	<input type="button" value="Set amount"/>	799.00

Reporting on the Spread Values

You can see all spread values across all opportunities by selectin the Spread quick launch in the left-hand gutter. Let's see how to use the Spread reporting.

1 – Selecting the Spread option in the left-hand menu displays a revenue spread report as shown below.

2 – Notice the Month Column – that is the date code that is automatically created for you. You can use column for powerful reporting – especially if you enter different dates within a month. The Month field will let you collect all those dates together within a monthly or quarterly timeframe. Drop as an email if you want to learn more.



The screenshot shows the SideKick 365 CRM interface. On the left, a navigation menu lists various options, with 'Spread' highlighted. A red arrow points to this option. The main content area displays a 'Revenue Spread' report. The report has a search bar at the top and a table below. The table columns are Salesperson, Account, Opportunity, Month, Date, and Amount. The data is grouped by date, with each group starting with a 'Date' header and a count in parentheses. The data rows show sales entries for various accounts and opportunities across different months and dates.

✓	Salesperson	Account	Opportunity	Month	Date	Amount
▲ Date : 10/31/2018 (1)						
		ABC Wood Supplies	ABC Wood - 10 Frisbees	October 2018	10/31/2018	\$80.00
▲ Date : 11/30/2018 (1)						
	Alan Steiner	Cat Claw Designs	100 PADlocks	November 2018	11/30/2018	\$500.00
▲ Date : 12/28/2018 (1)						
	Alan Steiner	Puppies R Us	20 Locks	December 2018	12/28/2018	\$139.40
▲ Date : 12/31/2018 (1)						
	Alan Steiner	Cat Claw Designs	100 Padlocks	December 2018	12/31/2018	\$299.00
▲ Date : 6/30/2019 (1)						
	Alan Steiner	A B C Lock & Key	Wilson High - Lockers 1500	June 2019	6/30/2019	\$7,785.00
▲ Date : 7/31/2019 (1)						
	Alan Steiner	A B C Lock & Key	Wilson High - Lockers 1500	July 2019	7/31/2019	\$6,000.00
▲ Date : 8/30/2019 (1)						
	Alan Steiner	A B C Lock & Key	Wilson High - Lockers 1500	August 2019	8/30/2019	\$4,000.00

Tip – You cans use the same day of the month when you enter a spread item to simplify reporting – I like the last day of the month – then you can use the date in the “Group By” as show in the report example in this guide.

Contacts

Contacts in SideKick 365 CRM are used in Accounts, Opportunities, and Projects. They hold information about a person and the related files using the Documents tab in the Contact detail screen – similar to the Opportunity, Account, and Projects modules. Let’s take a look.

The Screen below shows the Contact screen that includes Contact information and the tab entitled Documents to hold files related to this contact.



- Leads
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- Spread
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- Documents
- Categories
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- Sales People
- Sales Goals
- Sales Stages

Contact		Edit	Documents
Parent	<input checked="" type="radio"/> None <input type="radio"/> Account <input type="radio"/> Opportunity <input type="radio"/> Project		
Name *	Lyndon Bellerdine	Company	A B C Lock & Key
Job Title	CIO	Email	lyndon@bellerdine.com
Business Phone	415-705-1956	Mobile Phone	415-705-2887
Fax Number	415-705-2888		
Address	200 California St		
City	San Francisco	State	CA
Zip Code	94111	Country	USA
Salesperson	Alan Steiner	Profile	Alan_S_Profile
Campaign		Hot	<input type="checkbox"/>
Notes	Attachments MrSpock.jpg		

A few important points on this screen:

- 1 - Campaign – You can associate a Contact with a Campaign to track who you meet through various marketing Campaigns
- 2 - Attachment – You can attach an image to the Contact to display an image in the PowerApp as shown below.
- 3 - Hot – You can indicate if a contact is HOT
- 4 – You can add and associate Files with a contact using the Documents Tab



Create New
...

- Leads
- Accounts
- Opportunities
- Spread
- Projects
- Contacts
- Tasks
- Notes
- Documents

Search this site

Contact	Lyndon Bellerdine	Phone #	415-705-1956										
Salesperson	Alan Steiner	Company	A B C Lock & Key										
<div style="display: flex; justify-content: space-between; align-items: center;"> + New ↑ Upload ↻ Sync 🔄 Share More ▾ </div> <div style="margin-top: 5px;"> Current View ... <input type="text" value="Find a file"/> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>✓</th> <th>📄 Name</th> <th>Modified</th> <th>Modified By</th> <th>Category</th> </tr> </thead> <tbody> <tr> <td></td> <td> OutlookIntegration</td> <td>A few seconds ago</td> <td><input type="checkbox"/> Dave Chennault</td> <td></td> </tr> </tbody> </table> <p style="text-align: center; margin-top: 10px;">Drag files here to upload</p>				✓	📄 Name	Modified	Modified By	Category		OutlookIntegration	A few seconds ago	<input type="checkbox"/> Dave Chennault	
✓	📄 Name	Modified	Modified By	Category									
	OutlookIntegration	A few seconds ago	<input type="checkbox"/> Dave Chennault										

The Screen below shows the same Contact information in the PowerApp that you can download for free from AppSource. Notice the Image you uploaded in the Attachment field is displayed within the Contact Screen in the PowerApp.

Contacts Accounts Oppty's Notes Docs Tasks Projects Home

Contact Details

* Name Hot
Lyndon Bellerdine

Last Name
Bellerdine

Job Title
CIO

Company
A B C Lock & Key

 Comments and Notes

Email Address
lyndon@bellerdine.com

Business Phone Mobile Phone
415-705-1956 415-705-2887

Address
200 California St

City
San Francisco

State
CA

ZIP/Postal Code Country/Region
94111 USA

Products

SideKick 365 CRM includes a Products module that lets you create physical products that can be inventoried and services that can be used for standard labor rates that can be used within an Opportunity. Let's take a closer look,

1 - Select the quick launch to the Products module.

When you select the Products module, you will see the products grouped by Inventory and Labor items. This can be modified if you need if you want to group products differently.

Search this site

Products

+ new item

Current View Find an item

✓	Title	Code	Product Type	Weight	Price	Cost	Inventory Count	Safety Stock	Reorder	Location
Product Type : Inventory (9)										
	Master Electronic Padlock	Master Electronic Padlock	Inventory	1	\$49.99	\$34.99	150	20		HQ
	Master Lock 3 Blue	MasterBlue	Inventory	1	\$6.97	\$3.99	1,200	100		HQ
	MasterLock - 3 Inch w Key	MasterLock3inchKey	Inventory	1.5	\$7.99	\$4.59	2,500	250		HQ
	Masterlock Magnum	Magnum Masterlock	Inventory	3	\$27.97	\$17.99	145	15		HQ
	Padlock - 3 Inch	3InchPad	Inventory	1	\$7.99	\$3.49	500	50		HQ
	Padlock 40 MM	40MMPadlock	Inventory	1	\$2.65	\$1.50	1,500	50		HQ
	Standard Frisbee	StandardFrisbee	Inventory	1	\$8.00	\$4.00	2,400		200	Springfield Warehouse
	Vault Door	Brown-Vault	Inventory	800	\$12,000.00	\$7,999.00	35	10		HQ
	Yale - Key 3 Inch	Yale3Inch	Inventory	1	\$5.99	\$3.00	1,200	50		HQ
Product Type : Labor (2)										
	General Labor	LaborGeneral	Labor		\$22.00	\$14.00				
	Project Management	ProjMgt	Labor		\$35.00	\$20.00				

2 – Open a Product Record - Selecting one of the Product items, you can see details stored within SideKick 365 about it. The products module includes an inventory count, safety stock quantity, and location.

Product Edit

Name * MasterLock - 3 Inch w Key Code MasterLock3inchKey

Type Inventory

Weight 1.5 Price 7.99

Cost 4.59 Inventory Count 2500

Safety Stock Reorder 250

Location HQ

Description 3 Inch MasterLock Padlock - Key

Note - we presently do not update the inventory count when an Opportunity is closed. This is an option we are considering in the future, so let us know if this is a capability you are looking for!

Step 3 – All the products are listed in the dropdown in the Items grid within an Opportunity or Product – NICE!

Projects

The Projects module is very powerful and versatile. Projects can be attached to an Account, an Opportunity, or they can stand alone. They can be used to manage customer case files, manage the delivery of Projects, or be set up to manage a lot of information about specific topic. It is really up to your imagination how you use a Project. We originally designed them to be used for sales teams to work together on proposal development, but soon learned they were incredibly useful to manage a lot of information and collaborate on nearly any topic.

The Outlook and Office add-ins are also work with Projects, so you can easily save important copies of emails and Office files directly into a Project as needed. Projects can also be customized using SideKick 365 CRM Manager - included free with your purchase. Let's take a closer look Projects.

The screenshot below shows a project screen that has some data in it. Notice that Projects can track Tasks, Notes, Documents and Contacts as well as Products and the time you spend working on the Project – nice!

Projects are customizable and it is easy to add fields as needed to the Project template shown below. Take notice the combination of grids and tabs for navigation. We put the Notes, Products, and Time tracking as grids on the front page for easy reference and simple editing. Note that you can also track the products and time spent on a project in the grid at the bottom of the page.

Let's look at how you can create a Project.

- 1 - Select "Project" under the "Create New" menu in the left hand gutter
- 2 – Decide if you want to attach the Project an Account, Opportunity, or make it Stand-alone (not attached to anything)
- 3 – Fill out required information and hit OK

The screenshot shows a CRM interface for creating a project. The top navigation bar includes 'Project', 'Edit', 'Tasks', 'Notes', 'Documents', and 'Contacts'. The form fields are as follows:

- Name ***: Wilson High Locker Restoration
- Hot**:
- Parent**: None Account Opportunity
- Account * / Opportunity ***: A B C Lock & Key (dropdown) with 'New' button; Wilson High - Lockers 1500 (dropdown) with 'New' button
- Status**: Open (dropdown)
- Owner ***: Dave Chennault
- Start Date**: 05/31/2019
- End Date**: 08/31/2019
- Profile**: Alan_S_Profile (dropdown)
- Campaign**: Spring Fling - Redmond (dropdown)
- Description**: Wilson High Locker Restoration - Summer 2019.

Below the form is a 'Notes' section with a table:

Type	Title	Notes	Follow Up Date	Email
Idea	Consider using Recycled locks from L	8-1-18 We should look at using recycled locks from the Lincoln high project. I will ask Donnie what he thinks.	08/17/2018	AlanS@skylitesystems.com
Idea	Call Lyndon	Call Lyndon and discuss the project.	08/24/2018	AlanS@skylitesystems.com

4 – Now you can add Notes, Products, and Work Items as needed –

- Hit the little + next to the Note, Product, or Time Tracking to add an entry. Some sample entries have been entered as an example of what is possible. You can track what was actually spent or you could project what will be used/spent on the project – it’s really up to you!
- Hit the little Icon with a pencil to edit an item, hit the trashcan to delete
- Remember you can set an email reminder in a Note by putting in an email address and a follow up date

Notes +

	Type	Title	Notes	Follow Up Date	Email
✎	Phone Call	Discussed lock Options with Lyndon	5-11-16 Discussed options for locks with Lyndon. Should follow up to discuss final decision in late August		
✎	Reminder	Call Lyndon to discuss Marina Locks	Cal Lyndon to finalize decision on lock types at Marina High Project with ABC Lock and Key	08/26/2016	AlanS@skylitesystems.com

Items +

	Product	Code	Description	Qty	Cost	Price	Total Cost	Total Price
✎	Yale Lock with Key	YALELKKK	Yale Lock with Key	350	8.16	12.99	2,856.00	4,546.50
✎	Yale Padlock	YALEPDLK	Standard Padlock with a green face	150	5.49	6.99	823.50	1,048.50
✎	General Labor	GNULLBR	General labor used on Projects	60	12	25	720.00	1,500.00
✎	Project Management	PRJMGR	Standard Project Manager rate	20	85	85	860.00	1,700.00
							5,259.50	8,795.00

Time Tracking +

	Date	Start Time	End Time	Total Time	Product	Code	Notes
✎	05/11/2016	8:30	9:00	:30	Presales Activities	PRESLES	Discussed options with Lyndon on the phone

Email Campaigns

SideKick 365 CRM supports outbound email campaigns. Before diving in, let's take a moment to set expectations.

We are not trying to replace MailChimp or Constant Contact; rather SideKick35 CRM will support sending 500 or 1000 emails at a time if you are using Office 365. We do not suggest trying to send 5,000 or more emails in a single blast unless you are using your own mail server or a professional email service other than Office 365.....

The email campaign requires two modules – Campaign Groups and Campaigns. The Campaign Groups module is used to create the email lists that will be used to send emails out. The Campaigns module is used to create the email message and kick off the emails. You don't need anything "extra" to start sending newsletters or emails to anyone with a valid email if you are using Office 365.

Let's take a look how these modules work together to build email campaigns.

Campaign Groups

You need to build a campaign group to hold the list of recipients for an email campaign. You can target various campaigns by a creating a Campaign Group for each segment of customer or Prospects that you want to reach. SideKick 365 CRM can store and manage many different campaign groups, so you can slice and dice your contacts and add contacts prospects as needed to create specific targeted lists of customers and targets.

Building a campaign group is easy. We'll take a look at a few different ways to build them.

Method 1 – Creating a campaign group manually

Step 1 - Select the Campaign Groups Module and select "new item" to create a new Campaign Group as shown below

✓	Title	Active
	Fall 2018 Newsletter ✳	... Yes
	Name Begins with A	... Yes

Step 2 – Give the campaign Group a Name and select the group called Contacts as shown below. This will add all contacts in your contact list and you can delete them or add additional contacts outside your Contacts list in SideKick 365 CRM.

Name	Email
Abel Tuter	abel@tuter.com
Adela Cervantsz	adela@cervantsz.com
Aileen Mottern	aileen@mottern.com

Step 3 – Hit the green arrow and enter in a name and Email address for each person that you want to send an email to.

	Willard Roughen	willard@roughen.com
	William Mahmud	william@mahmud.com
	Wilmer Constantineau	wilmer@constantineau.com
	Winnie Reich	winnie@reich.com
	Yvette Kokoska	yvette@kokoska.com
	Zackary Mockus	zackary@mockus.com
	Zane Sulikowski	zane@sulikowski.com

Method 2 – Using a view from Contacts

You can build a list view in the Contacts Module and then use that list view to create a Campaign group. Let explore how to do that.

Step 1 – Open the Contacts module by selecting the Contacts quick launch in the left hand gutter

Step 2 – Select any Contact in the list with a single click (see below)

Step 3 – Select the List Tab – this will activate the List Ribbon (see below)

Step 4 – Select the option Create View as shown below (see below)

The screenshot shows the CRM interface with the following elements:

- Top Ribbon:** The 'LIST' tab is selected. The 'Create View' option is highlighted in the ribbon.
- Left Gutter:** The 'Contacts' module is selected.
- Main View:** A list view of contacts is displayed. The contact 'Abel Tuter' is selected.

Name	Business Phone	Mobile Phone	Email Address	Job Title	Company	Owner
Abel Tuter	610-370-6549	610-370-0856	abel@tuter.com	President	Wernsing Plumbing & Heating	Jesika McNeil
Adela Cervantsz	205-755-4137	205-755-1034	adela@cervantsz.com	CIO	Arizona Awards	Brad Sutton
Aileen Mottern	201-944-1664	201-944-3382	aileen@mottern.com	Buyer	Bennett Hallmark Cards	Brad Sutton
Alejandra Prenatt	708-496-6958	708-496-4617	alejandra@prenatt.com	CFO	Mitchell De Burring Co	Jesika McNeil
Alejandro Mascall	703-684-2882	703-684-8561	alejandro@mascall.com	Buyer	Railway Educational Bureau	Alan Steiner
Alene Rabeck	708-333-8056	708-333-2125	alene@rabeck.com	Operations	Bucks County Of	Alan Steiner
Alfonso Griglen	419-634-3513	419-634-5733	alfonso@griglen.com	CIO	Paul D Friedman	Alan Steiner
Alissa Mountjoy	707-585-9715	707-585-7011	alissa@mountjoy.com	Clerk	Technical & Mgmt Svc Corp	Jesika McNeil
Allan Schwandt	503-434-9666	503-434-3863	allan@schwandt.com	CSO	Micro Wire Products	Jesika McNeil
Allie Pumphrey	812-477-0753	812-477-4604	allie@pumphrey.com	CIO	Asher, Ronald L Md	Amy Adams
Allyson Gillispie	609-584-1794	609-584-0645	allyson@gillispie.com	Operations	De Friese Theo & Sons	Jesika McNeil
Alva Pennigton	904-260-2345	904-260-3735	alva@pennigton.com	Clerk	Citizens Savings Bank	Amy Adams
Alyssa Biasotti	845-343-1878	845-343-5354	alyssa@biasotti.com	Owner	Johnson Hardware Co	Alan Steiner
Amelia Caputo	907-456-1748	907-456-7535	amelia@caputo.com	Operations	Security Marketing Agency	Brad Sutton

Step 5 – Create a List view and filter based upon desired criteria. In the example below, we are building a campaign group for all contacts in New York.

Filter

Show all of the items in this view, or display a subset of the items by using filters. To filter on a column based on the current date or the current user of the site, type [Today] or [Me] as the column value. Use indexed columns in the first clause in order to speed up your view. Filters are particularly important for lists containing 5,000 or more items because they allow you to work with large lists more efficiently. [Learn about filtering items.](#)

Show all items in this view

Show items only when the following is true:

Show the items when column

State/Province

is equal to

And Or

When column

None

is equal to

Step 6 – Once this list view in Contacts has been saved, it can now be used to create a Campaign group. Open the Campaign Group module and select “New Item”

Step 7 – Now select the New York option in the Select List as shown below.



- Leads
- Accounts
- Opportunities
- Spread
- Projects
- Contacts
- Tasks
- Notes

Group Name: New York

Status: Active Inactive

View:

- All contacts
- Contacts
- Select Contacts
- Name Begins with A
- Name Start with Z
- Fall 2018 Newsletter
- New York

Step 8 – All the contacts from the New York List are automatically added to this new campaign group. Edit as needed by adding or deleting additional members. You can also access the list of email recipients within this email campaign group and copy and paste in a large number of entries that are NOT contacts in SideKick 365 CRM. Send us an email at Info@SkyLiteSystems.Com if you want to learn how to do this and we'll walk you through that process.



- Leads
- Accounts
- Opportunities
- Spread
- Projects
- Contacts
- Tasks
- Notes
- Documents
- Categories
- Products
- Campaigns

Group Name: New York

Status: Active Inactive

Name	Email
Billie Tinnes	billie@tinnes.com
Cristina Sharper	cristina@sharper.com
Rudy Kuhle	rudy@kuhle.com
Gale Nolau	gale@nolau.com
Lucien Iurato	lucien@iurato.com
Enrique Oroark	enrique@oroark.com
Mitzi Ihenyen	mitzi@ihenyen.com
Randal Gansen	randal@gansen.com

Building Emails for your Campaign

Now that you have built your email campaign recipient list, it is time to build your email. You have a lot of options and we'll review a few in this section. Let's get started....

Step 1 – Create a new Campaign by selecting the Quick launch called Campaigns and then select “New Item”

Step 2 – Start filling out the fields in the new Campaign form. Note - fields with a red star are required

Step 3 – Select the Campaign group that you want to use to select the recipients of the email campaign

Step 4 – Now the fun part – build the body of the email! HTML is supported as well as text. We like using a newsletter Creator that can be found here - <http://www.newslettercreator.com/> . It lets you create great newsletters using a drag and drop graphical design tool and then you just copy and paste the email into the Body filed within the campaign – it works great!

Step 5 – Select the Send Email checkbox and an email will be sent to each recipient in the Campaign Group

The screenshot displays a campaign configuration interface. On the left is a navigation menu with items like Leads, Accounts, Contacts, Opportunities, Tasks, Notes, Projects, Documents, Categories, Profiles, Products, Campaign Groups, Campaigns, and Spread. The main area has two tabs: 'Overview' (selected) and 'Edit'. Below the tabs are several form fields:

- Name ***: SkyLite Mailer
- Type**: Marketing Flyer (dropdown)
- Date of Email ***: 05/26/2016
- Send Email**:
- Description**: General Interest Campaign - May/June 2016
- Campaign Group ***: New Campaign Group (dropdown)
- Subject Line ***: SkyLite Systems makes the Best SharePoint Apps

Below the fields is a rich text editor with a toolbar containing icons for bold, italic, underline, link, unlink, list, and image. The editor's content area shows a preview of an email body. At the top is the SkyLite Systems logo. Below it is a promotional message:

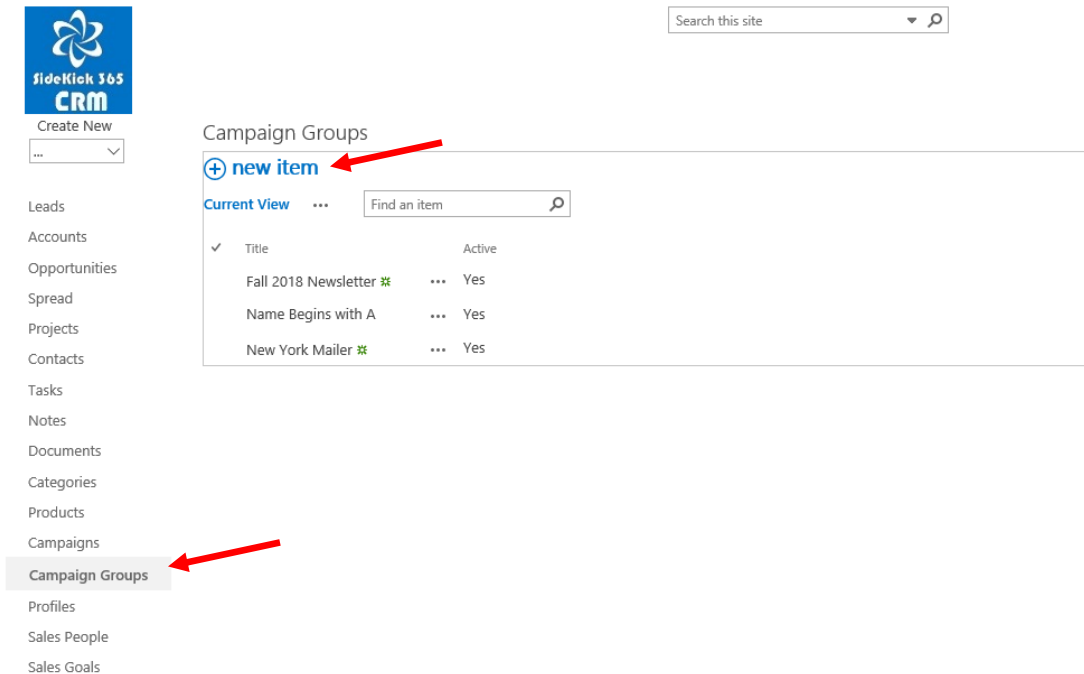
SiyLkte Syestms Bliidus Apps for SaoPntheit in O635
Sytile Smtytes bdiidus apps for SrehinaPot that can be used awthermye you can acescs Olfefie 38.5 The app is getnlig upargedd dilay with new fueaters aeenppng every few week. Seealt the bituon below to hvae us canoct you!

At the bottom right of the preview is a 'Connect Me' button.

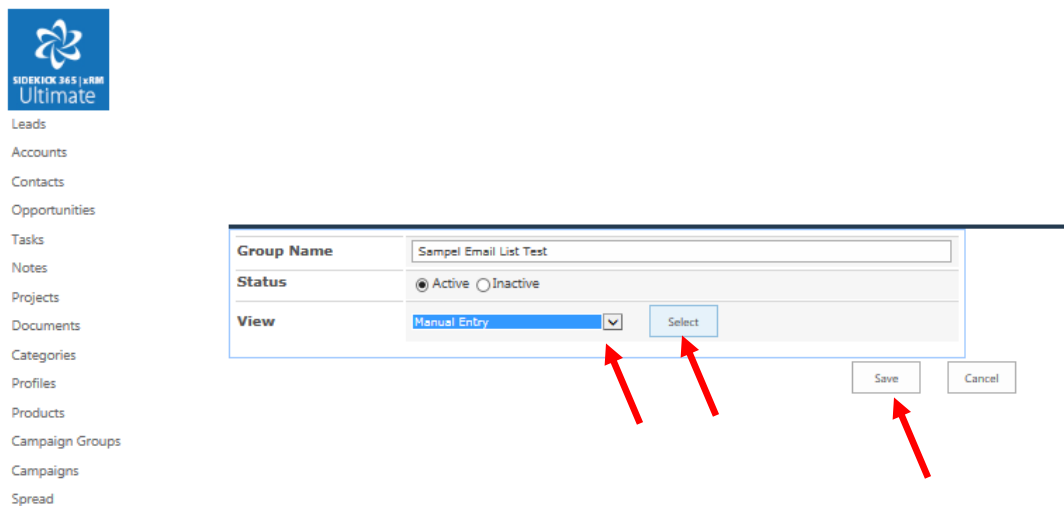
Sending a Test Campaign – Your turn to try it out!

We have set up a simple way you can use to test out the email campaigns. Follow the steps below to test sending out a simple email newsletter campaign from this demo.

Step 1 - Go to the Campaign Group Module using the Quick launch link in the left hand gutter and select New Item as shown below



Step 2 - Now give the test campaign group a name and pick the “Manual Entry” option in the dropdown then hit the select button as shown below



Step 3 - OK – now you are ready to start entering in some test emails. Just hit the green plus button and add in a name and email address for as many test emails as you want to send. NOTE – we can show you how to cut and paste a large number of email address from Excel if needed

Keep adding by hitting the green arrow and then hit the Save Button when you are done. If you make a mistake, just delete that entry and enter it again



- Leads
- Accounts
- Contacts
- Opportunities
- Tasks
- Notes
- Projects
- Documents
- Categories
- Profiles
- Products
- Campaign Groups
- Campaigns
- Spread

Group Name: Sample Email List Test

Status: Active Inactive

Name	Email
Willy Wonka	WillyWonka@Gmail.Com
Augustus Gloop	AGloop@Gmail.Com

Save Cancel

OK – now you are ready to use the Campaign Group you just created to send out a mailer within the campaign module.

Creating a Campaign

Follow the step below to make a simple email campaign

Step 1 - Select the Campaign Module using the quick link in the left hand gutter

Step 2 - Create a new campaign by selecting the “new item” link.



Create New
...

- Leads
- Accounts
- Opportunities
- Spread
- Projects
- Contacts
- Tasks
- Notes
- Documents
- Categories
- Products
- Campaigns
- Campaign Groups
- ...

Search this site

Campaigns

+ new item

Current View

Find an item

✓ Title	Campaign Type	Date of Email	Description	Email Group	Subject
Spring Fling - Redmond	Conference		Spring Fling Conference in Redmond		
Winter Designs - New York	Expo		Expo near JFK at Marriott on 12/7/2017		
Fall - 2018 - Newsletter	Mailer	8/20/2018	Fall NewsLetter from 99Designs	Fall 2018 Newsletter	Fall Newsletter - 2018

Step 3 – Now create your campaign. The body field in the screen supports rich text and you can copy and paste in well formatted html or compose your email txt using the rich text editor within the form. Hint – we like using the newsletter tool called MailStyler (<http://www.newslettercreator.com>) to create newsletters and then copy and paste into the body field of your new campaign. You can also open an existing campaign and copy and paste from the body in that campaign.



- Leads
- Accounts
- Opportunities
- Spread
- Projects
- Contacts
- Tasks
- Notes
- Documents
- Categories
- Products
- Campaigns
- Campaign Groups
- Profiles
- Sales People
- Sales Goals
- Sales Stages

Overview [Edit](#)

Name *	Fall - 2018 - Newsletter
Type	Mailer
Date of Email	08/20/2018
Send Email	<input checked="" type="checkbox"/>
Description	Fall NewsLetter from 99Designs
Campaign Group	Fall 2018 Newsletter
Subject Line	Fall Newsletter - 2018

```
<!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0 Transitional//EN" "http://www.w3.org/TR/xhtml1/DTD/xhtml1-transitional.dtd">
<html xmlns="http://www.w3.org/1999/xhtml">
  <head>
    <title></title> <style><!--* {
  }
}
body {
  Margin:0;
  padding:0;
  min-width:100%;
  font-family:Arial, sans-serif;
}
table {
  border-collapse: collapse;
}
```

Step 4 – When you are ready to send the email campaign, select the “Send Email” checkbox. Note – you can save the campaign without sending if you do not select the Send Email checkbox. You can open it at a later time and hit the edit option, then hit the Send Email and save the campaign record and the emails will start to be sent.

Go ahead and give it a try!

Searching

All of the content entered or uploaded into SideKick 365 CRM is indexed and searchable. If you are using Office 365, anything you upload to SideKick 365 CRM that can be indexed is searchable within 10 minutes after saving it. If you are using SideKick 365 CRM on your servers, the amount of time it takes to index is set by your SharePoint administrator. Either way, after an item is indexed, you can find it using the Search capability in SharePoint. Let's try out Searching and see how it works.

1 - Navigate to the home page and type in the word "negotiable" in the search box on the home page and then select the magnifying glass as shown below.

The screenshot shows the SideKick 365 CRM home page with a search bar at the top containing the word "Negotiable". A red arrow points to the magnifying glass icon in the search bar. Below the search bar, there are three sections: "My Open Tasks", "My Open Opportunities", and "Accounts".

My Open Tasks

Task Name	Task Status	Due Date	Account	Opportunity	Project
Call lyndon re Wilson High	In Progress	August 3	A B C Lock & Key		
daves new task	In Progress	4 days ago	A B C Lock & Key		
Invite Dale from Wilson High to Office	In Progress	August 30			Wilson High Locker Restoration
Investigate Opportunities in Little Rock School District with ABC Lock	In Progress	August 31	A B C Lock & Key		
Wilson High - Lyndon - Review Proj Plan	In Progress	September 28	A B C Lock & Key	Wilson High - Lockers 1500	
Set Up Tour for Lyndon	In Progress	October 31	A B C Lock & Key		

My Open Opportunities

Title	Amount	Probability	Expected Close Date	Account	Contact
ABC Lock and Key - Wilson High - 25 3 Inch locks	\$199.75	25	10/31/2018	A B C Lock & Key	Joe Biden

Accounts

Title	Account ID	Account Type	Salesperson	Phone	Contact	Parent	Territory
A B C Lock & Key	23090	Customer	Alan Steiner	415-705-1956	Lyndon Bellerdine		Enterprise
A Limousine Service	14724	Prospect	Alan Steiner	512-458-0034	Eliseo Wice		Enterprise

2 – You will see that there are two results as shown below. Go ahead and double click on the name of one of the items and you will then see an image of the scanned check.

The screenshot shows the SideKick 365 XRM Enterprise search interface. The search bar contains the word "negotiable". Below the search bar, there are two search results:

Check from Greg
GREGORY GINGHAM 789 Glasso Road Grossland, RI 08901 DATE 01/22/06 8901 23-86902245 ~~~1~1~EAlison Salmora 1\$1 1,010.00 FOR THE CHECK COMPANY
www.checkcompany.com 1:75~2 ...
skylitedemo.sharepoint.com/.../Check 8901 from Gregory Gingham.pdf

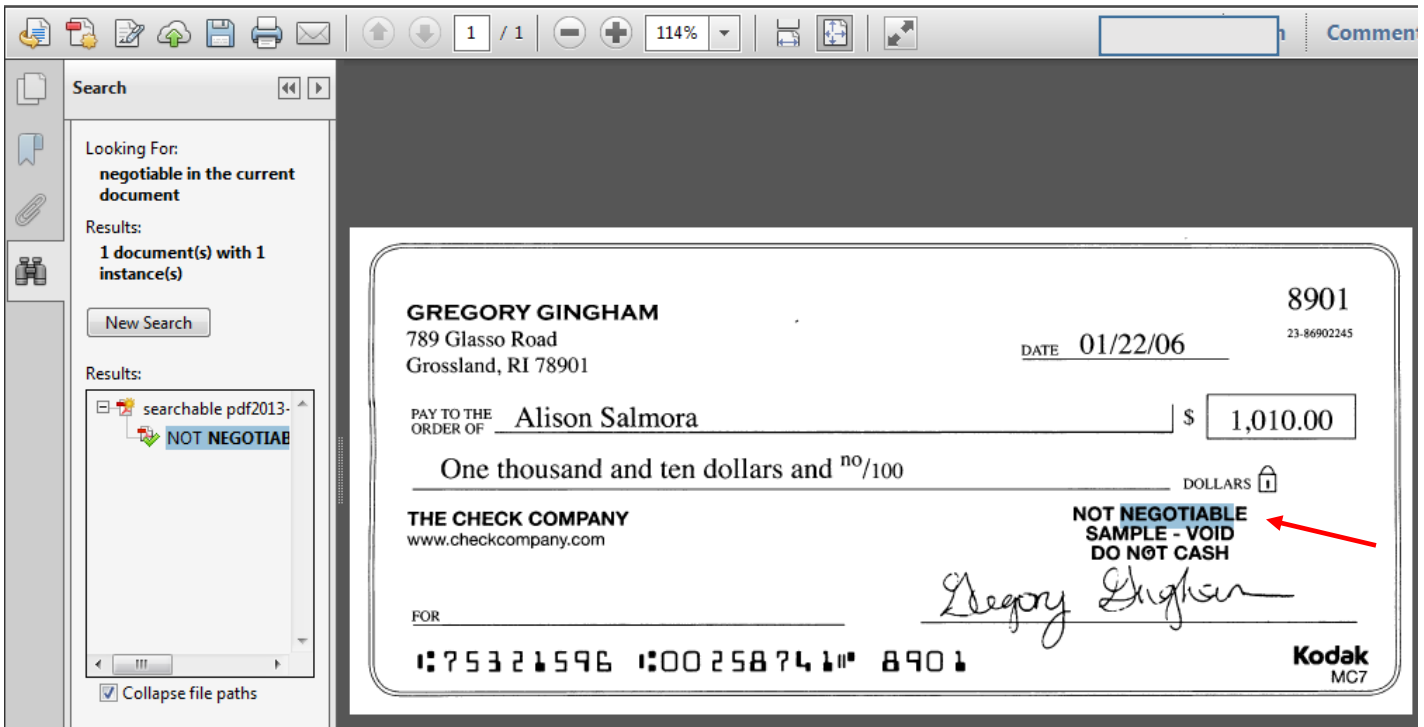
Check from Brooke
skylitedemo.sharepoint.com/.../Check 2345 from Brooke Blend.pdf

Results found in SideKick 365 XRM Enterprise

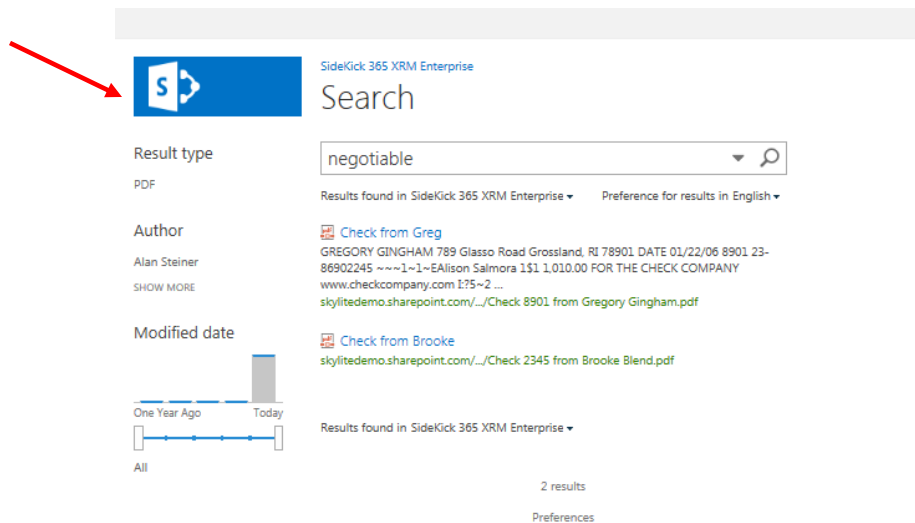
2 results

Preferences

3 – Notice the words “Not Negotiable” on the checks that were scanned into SideKick 365 CRM. SideKick 365 CRM can find these checks because they were scanned into the system as a searchable pdf. Any scanned file that is saved as a searchable PDF will be “searchable”. The quality of the indexes will depend upon the quality of the original document content. Handwriting is probably not going to be very good, but printed pages should be very easy for the search engine to index.



4 - Select the back arrow in the browser to return to the search results page. Now select the blue “S” to return to the home page.



Security

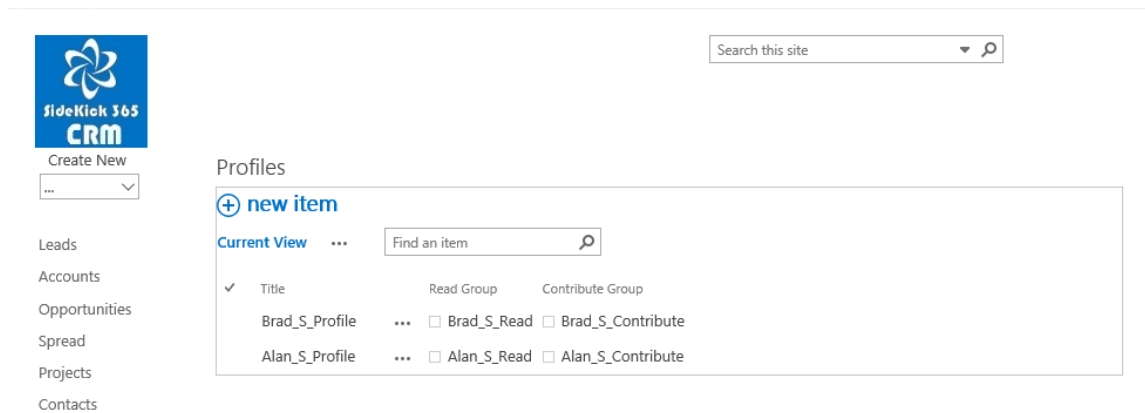
SideKick 365 CRM lets you decide “who” can read or edit an Account, Opportunity, or Contact by associating a security role with of these items. This part of the guide will show you how Security is used and how to set it up. Let’s get started.

Security Profile

Security starts with setting up a security profile in SideKick 365 CRM. Security profiles can be created by users that have been granted “full control” permissions in the SharePoint site where SideKick 365 CRM was installed. Normally, the administrator of that site will create a SharePoint group to manage the users allowed to create and set permissions on an item. This group will have permissions set to “full control”.

Users with full control permissions can select the quick launch menu option called Profiles as shown below. This will let you view and edit the security profiles available within the Account, Contact, and Opportunities. Users with full control will see the names of the security profiles in the dropdown field called “Profile” when you create or edit a Contact, Account, or Opportunity.

If you take a close look at the Security Profile shown below, you will see there is a Read Group and an Edit group associated with each profile. These are SharePoint groups that are created by the SideKick 365 CRM administrator. Each group contains the users of SideKick 365 CRM that can either read or edit the item that has the assigned security profile.



The screenshot displays the 'Profiles' section of the SideKick 365 CRM interface. On the left, there is a navigation menu with the SideKick 365 CRM logo and a 'Create New' dropdown menu. Below the logo, a list of navigation items is visible: Leads, Accounts, Opportunities, Spread, Projects, and Contacts. The main content area is titled 'Profiles' and features a '+ new item' button and a search bar labeled 'Find an item'. Below this, there is a table with the following structure:

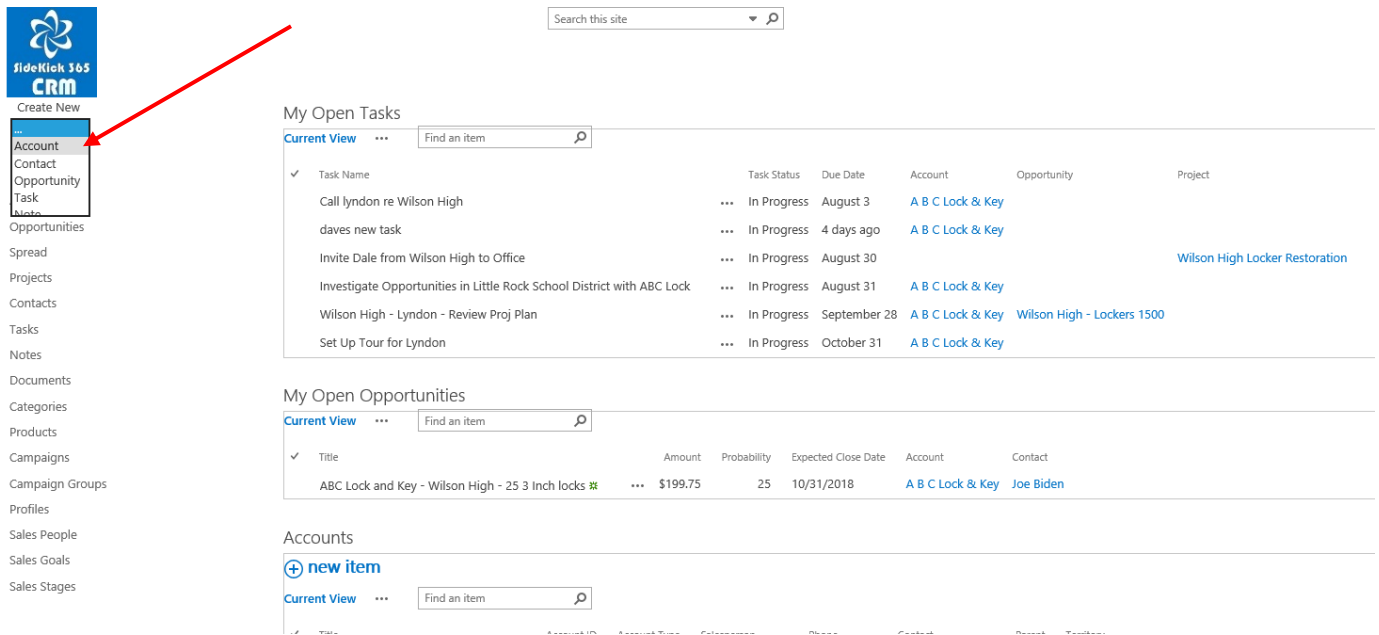
✓	Title	Read Group	Contribute Group
	Brad_S_Profile	... <input type="checkbox"/> Brad_S_Read	<input type="checkbox"/> Brad_S_Contribute
	Alan_S_Profile	... <input type="checkbox"/> Alan_S_Read	<input type="checkbox"/> Alan_S_Contribute

Using a Security Profile

Security profiles are a great way to limit the amount of information presented to a user and also keep them focused on their work. Security profiles also limit what is returned in search results. It is easy to use Security profiles to limit “who” can see “what” - let’s get started

Tip – A Security profile can be assigned or changed as needed. You can also edit the members of the Read and Edit SharePoint groups associated with a profile to control the access users have to items that have the security profile applied to an item.

1 - Create a new Account by selecting “Account” under the Create New dropdown in the quick launch as shown below



The screenshot shows a CRM interface with a 'Create New' dropdown menu on the left. A red arrow points to the 'Account' option. The main content area is divided into three sections: 'My Open Tasks', 'My Open Opportunities', and 'Accounts'.

My Open Tasks

Task Name	Task Status	Due Date	Account	Opportunity	Project
Call Lyndon re Wilson High	In Progress	August 3	A B C Lock & Key		
daves new task	In Progress	4 days ago	A B C Lock & Key		
Invite Dale from Wilson High to Office	In Progress	August 30			Wilson High Locker Restoration
Investigate Opportunities in Little Rock School District with ABC Lock	In Progress	August 31	A B C Lock & Key		
Wilson High - Lyndon - Review Proj Plan	In Progress	September 28	A B C Lock & Key	Wilson High - Lockers 1500	
Set Up Tour for Lyndon	In Progress	October 31	A B C Lock & Key		

My Open Opportunities

Title	Amount	Probability	Expected Close Date	Account	Contact
ABC Lock and Key - Wilson High - 25 3 Inch locks	\$199.75	25	10/31/2018	A B C Lock & Key	Joe Biden

Accounts

new item

Title	Account ID	Account Type	Category	Phone	Contact	Parent	Toolbox
-------	------------	--------------	----------	-------	---------	--------	---------

Selecting the Create New “Account” dropdown option will activate the new account screen as shown below. For this section, we want to focus on the field called “Profile”. Selecting the “Profile” dropdown within the new account will show all the security profiles managed within the Profiles module as shown below.



- Leads
- Accounts
- Opportunities
- Spread
- Projects
- Contacts
- Tasks
- Notes
- Documents
- Categories
- Products
- Campaigns
- Campaign Groups
- Profiles
- Sales People
- Sales Goals
- Sales Stages

Once a profile is selected and the Account is saved, then only the users in the Read and Edit groups associated with that security profile will be able to either view or edit that account. All of the related Documents, Tasks, Opportunities, and Notes also share the same security profile.

Security Profiles in Action

Let's see how Security profiles work.

Log in to SideKick 365 CRM as [DEMO USER 1 THAT WE SEND YOU](#) using and select the Accounts Quick launch link and take note of the Accounts that are listed in the list of accounts. Notice that they all share the security profile Alan_S_Profile as shown below:

Search this site

Accounts

[+ new item](#)

Current View ...

✓ Title	Account ID	Account Type	Salesperson	Phone	Contact	Parent	Territory	Profile
A B C Lock & Key	23090	Customer	Alan Steiner	415-705-1956	Lyndon Bellerdine	Enterprise	Enterprise	Alan_S_Profile
A Limousine Service	14724	Prospect	Alan Steiner	512-458-0034	Eliseo Wice	Enterprise	Enterprise	Alan_S_Profile
Aaron William Esq	15074	Prospect	Brad Sutton	845-343-2313	Rosalie Krigger	Small Business	Small Business	Brad_S_Profile
ABC Wood Supplies	...	Lead	Dave Chennault	777-090-0900				
Accurate Color Inc	18094	Customer	Jesika McNeil	541-342-0606	Lynda Youtsey	Small Business	Small Business	Brad_S_Profile
...

Now log out and close your browser.

Next log in as [DEMO USER 2 THAT WE SEND YOU](#) and use the same password “SideKick1” and then select the list of Accounts and notice that you see different accounts – all with the security profile of Brad_S_Profile as shown below:

The screenshot shows the SideKick 365 CRM interface. On the left is a navigation menu with options like Leads, Accounts (selected), Opportunities, Spread, Projects, Contacts, Tasks, Notes, and a 'Create New' button. The main area displays the 'Accounts' list. At the top right is a search bar. Below the 'Accounts' header is a 'new item' button and a 'Current View' dropdown. A search bar for items is also present. The table below lists several accounts, all of which have 'Brad_S_Profile' as their profile.

Title	Account ID	Account Type	Salesperson	Phone	Contact	Parent	Territory	Profile
Aaron William Esq	15074	Prospect	Brad Sutton	845-343-2313	Rosalie Krigger		Small Business	Brad_S_Profile
ABC Wood Supplies		Lead	Dave Chennault	777-090-0900				
Accurate Color Inc	18094	Customer	Jesika McNeil	541-342-0606	Lynda Youtsey		Small Business	Brad_S_Profile
Acker Knitting Mills Inc	18366	Customer	Brad Sutton	512-478-0371	Margarito Kornbau		Small Business	Brad_S_Profile
Acra Aerospace Inc	9923	Customer	Brad Sutton	773-256-3550	Celia Slavin		Small Business	Brad_S_Profile
Action Nursing Care LLC	15180	Lead	Jesika McNeil	505-881-2899	Laurie Bibbs		Small Business	Brad_S_Profile

Try looking at the Contacts and Opportunities as well and you will see the same “trimmed” listings - meaning you only see the items you are supposed to see.

The Power of the Security Profiles

Security profiles let you set up sales teams, divisions, product lines, sales regions and even multiple companies as needed. They are very powerful and products with similar capabilities cost many times more than SideKick 365 CRM.

Customization

SideKick 365 CRM can be customized to meet your needs. Each screen has flexibility so that extra fields can be added as needed. The layout of each page and reports can also be adjusted to suit your specific needs. See the video showing how SideKick 365 CRM can be customized by watching the video on customization here.

<https://skylitesystems.com/sidekick-365-crm-videos>

Please or contact SkyLite Systems at Info@SkyLitesystems.Com with specific questions and requirements if you need any customization of screens, reports or integration with line of business solutions.

How to Exit

It is easy to exit from SideKick 365 CRM, just go to the File menu and select the “exit” option.

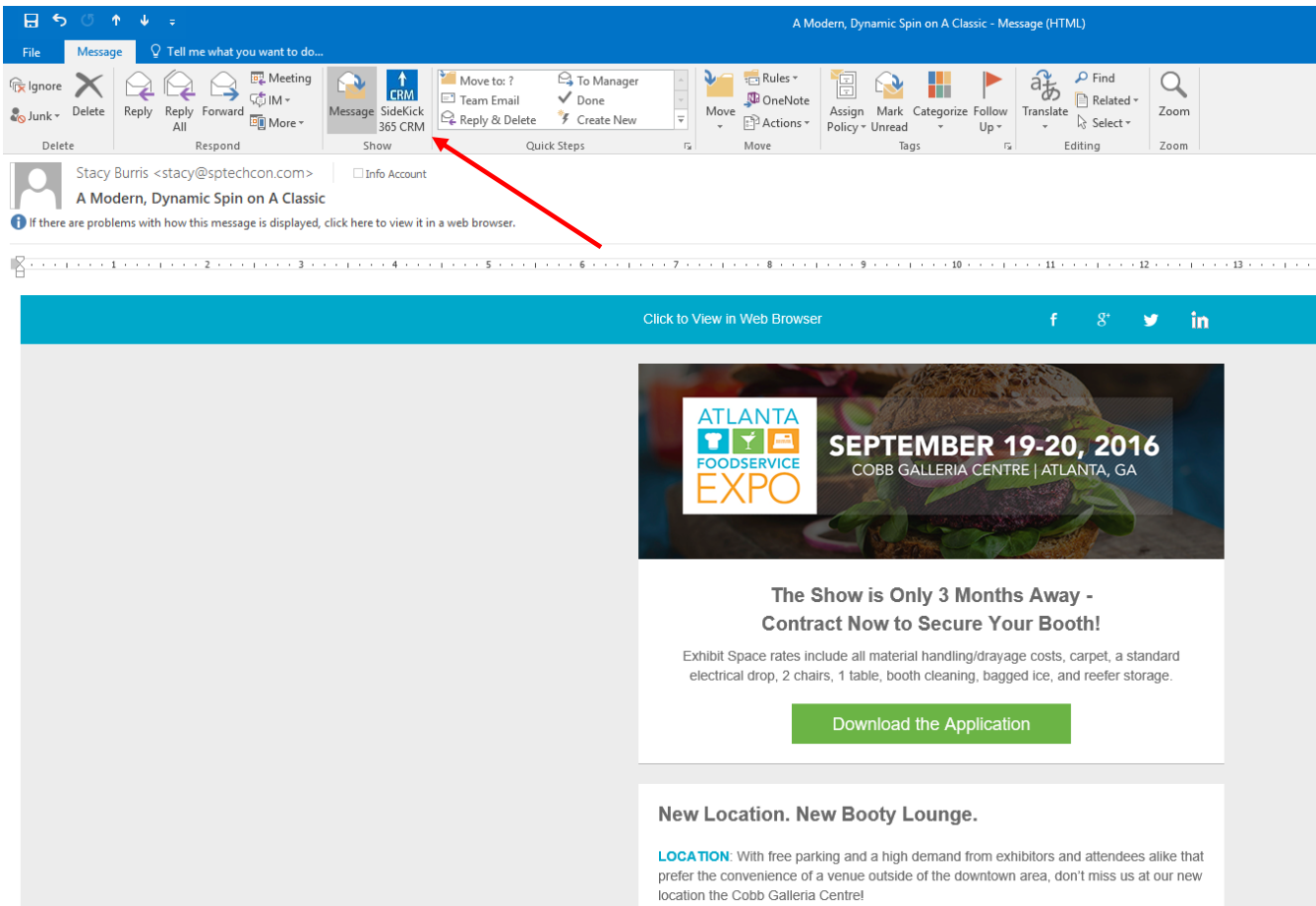
Section 2 - SideKick 365 CRM Office Add-ins

Add-ins for Office and Outlook (email) are available for no additional charge to copy Microsoft Office files directly from these apps directly into SideKick 365 CRM Accounts, Opportunities, Projects and Contacts (coming in Fall 2018). Add-ins are available for Outlook, Word, PowerPoint and Excel. This is one of the favorite capabilities of our customers because it instantly turns emails and documents into something you can share – in context – with the whole team working on an Account, Opportunity or Project. Best of all, the emails and files are “searchable” including any Office files saved as an attachment to an email – WOW!

Let’s take a closer look at how the Add-in work for Outlook....

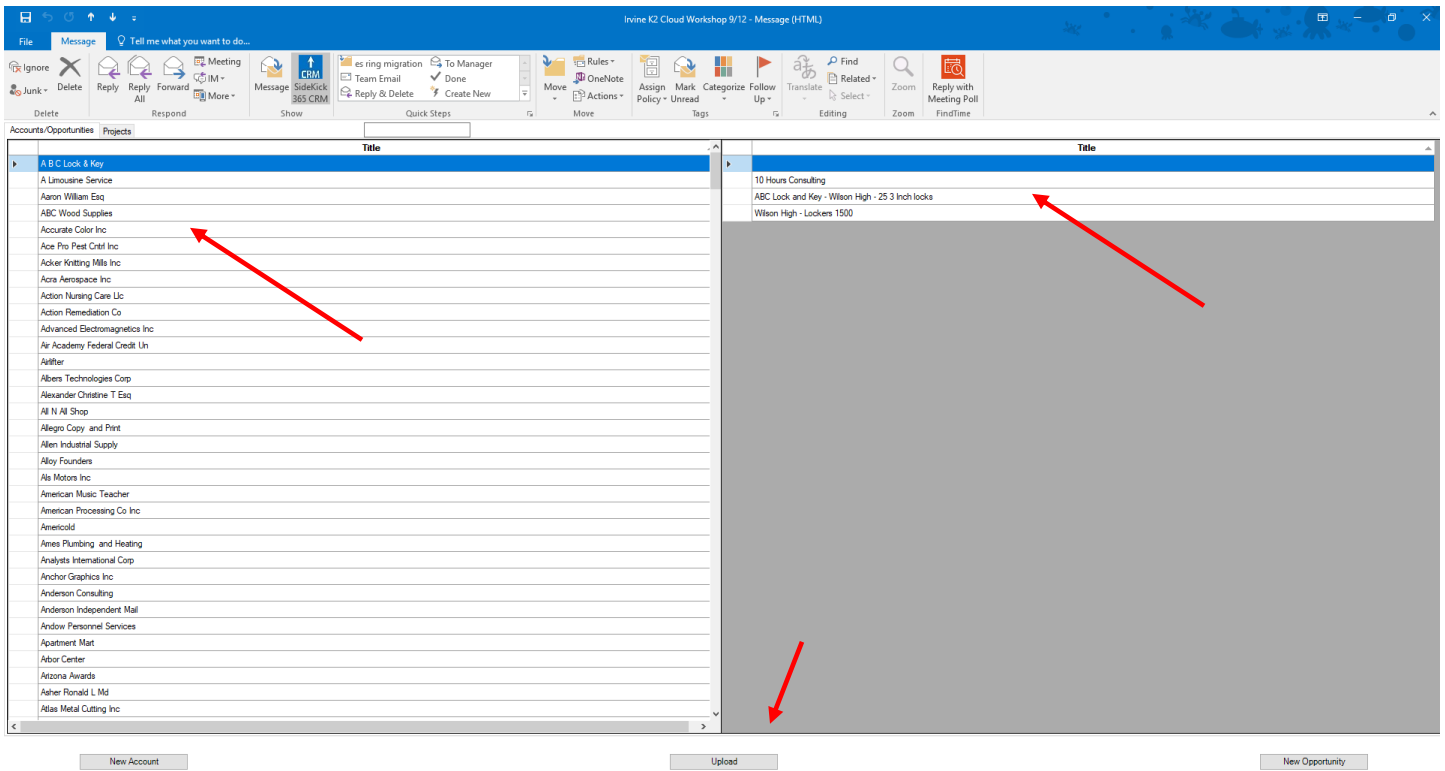
Using the Outlook Add-In for SideKick 365 CRM

The Add-in for SideKick 365 CRM is installed onto the PC each user that is using to access Outlook. When a User opens an Outlook email, they will see a new Icon in the Ribbon for that email for SideKick 365 CRM as shown below.



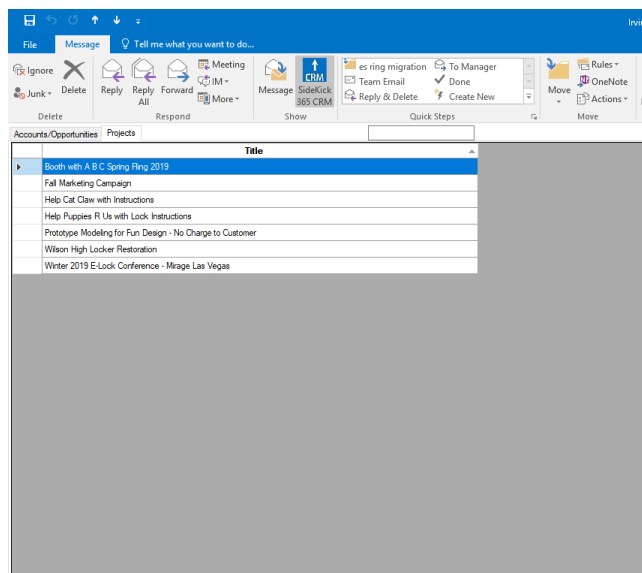
When the user selects the Icon, they are presented with a screen that lets them pick the Account, Opportunity, Or project where they want to save a copy as shown below

- Accounts are listed on the Left
- Opportunities for that account are listed on the right



When you ready, select the Opportunity or Account and hit the Upload button at the bottom of the page and a copy of the email is saved into the Docs tab of the selected Account or Opportunity. Note – this works the exact same for Word, Excel, or PowerPoint, just select the SideKick 365 CRM Button in the Ribbon – Nice!

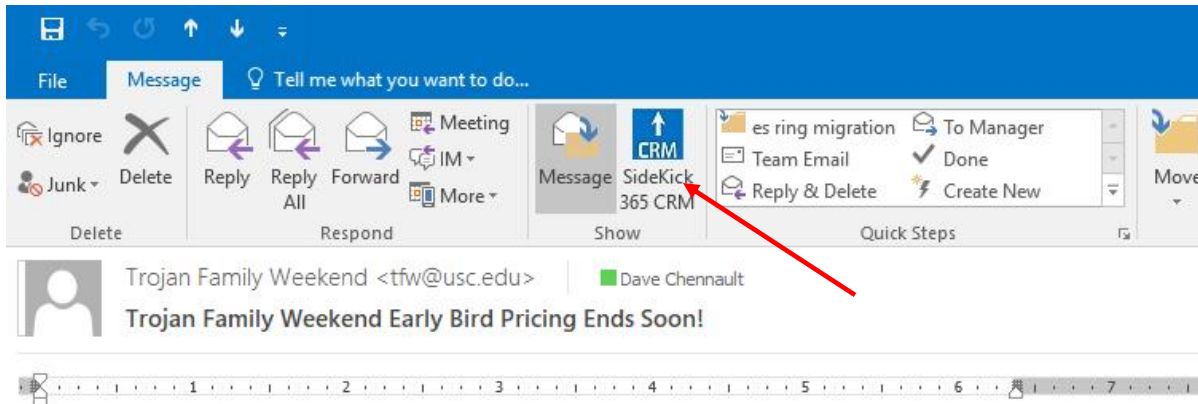
You can also select Projects and save an email, Word, PowerPoint, or Excel file into the Docs associated with a Project as shown below.



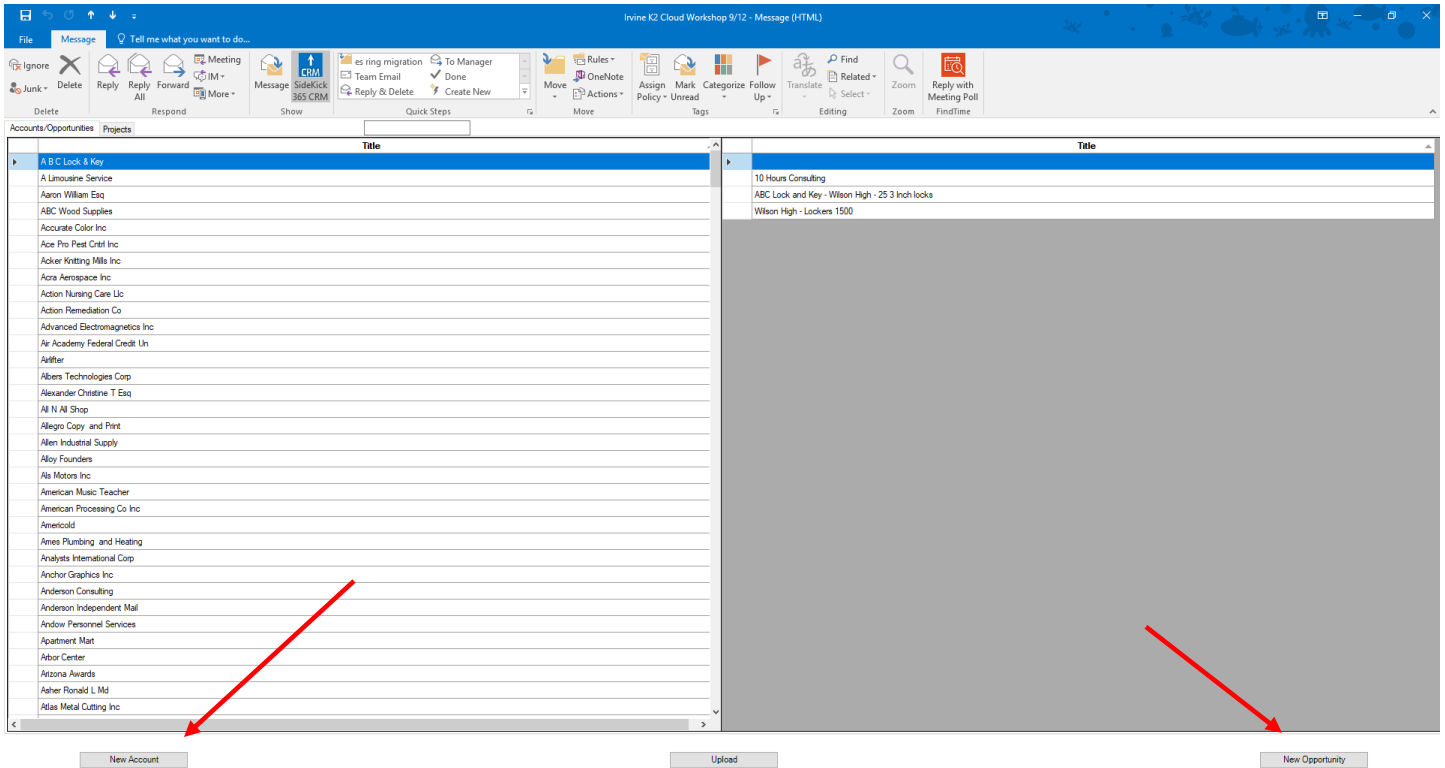
Creating a New Account, Opportunity, Or Project

Suppose an email arrives that looks like a great new deal, but you have never worked with this company before. Not a problem – you can create a new Account, Opportunity, or Project from WITHIN the add in – Nice! Let’s take a look...

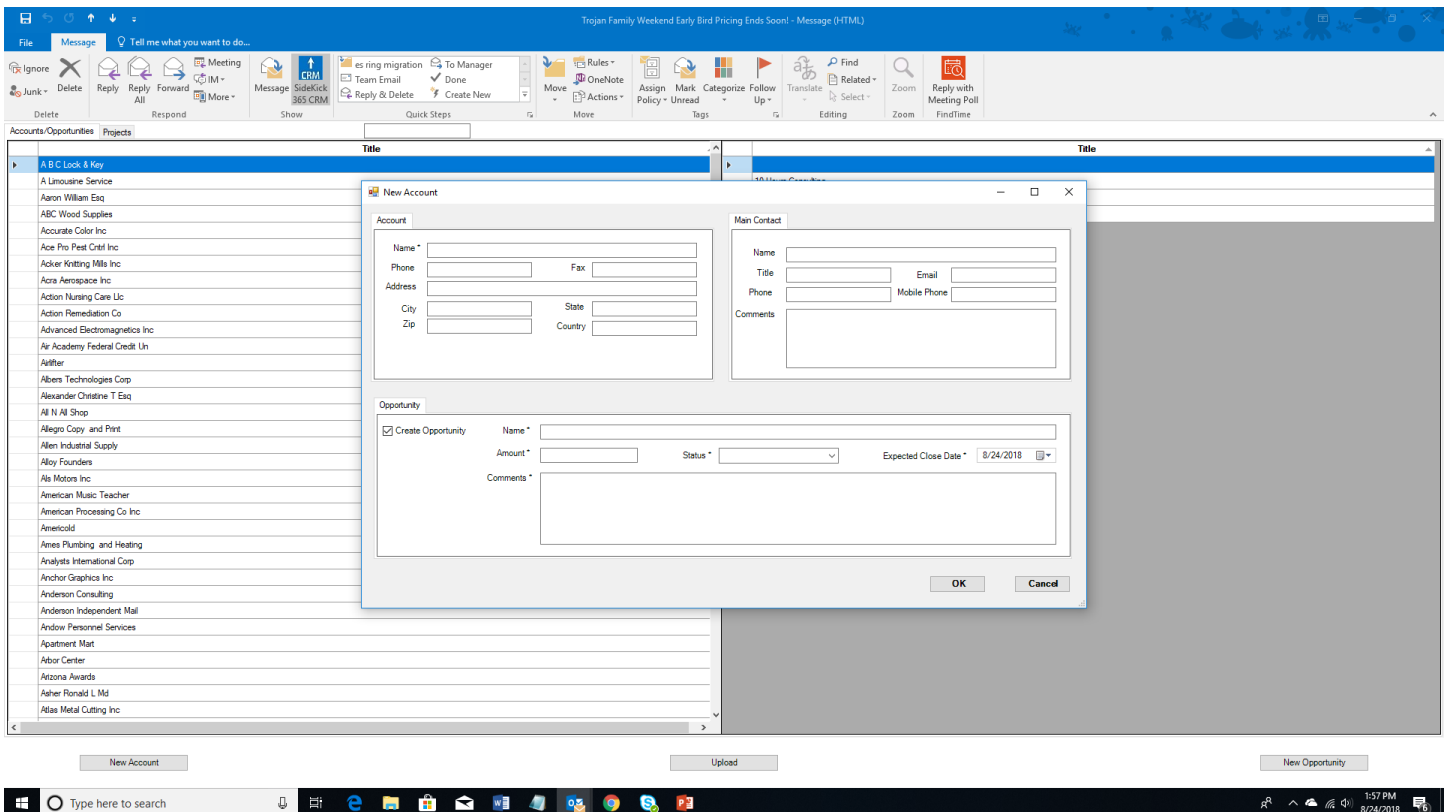
Open the Email and select the SideKick 365 CRM Button



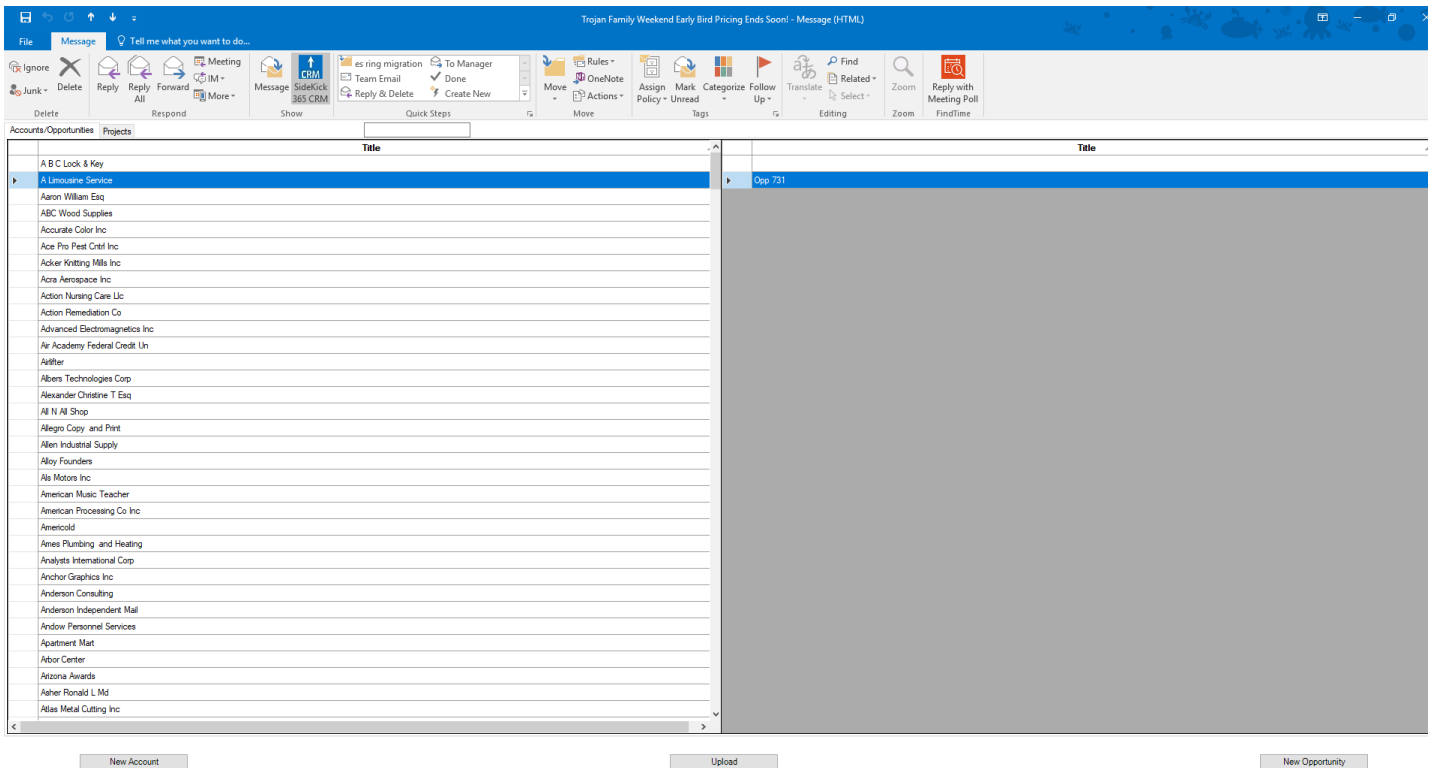
Now Select the New Account, New Opportunity, or New Project Button.



Once you select the button a screen appears that lets you add the new Account, Opportunity, or Project as shown below. Go ahead and type in the information required – what you enter depends if you are creating a new Account, Account and Opportunity, Opportunity Only, or Project – and hit OK.



After a few moments, you will see the listing of Accounts and Opportunities or Project with the new entry listed.



Go ahead and upload a copy of the Email or Word, Excel, or PowerPoint file as you normally would by hitting the Upload button.

WOW – what a time saver...

Next Steps

The add-ins run on your PC and are available for Outlook, Word, PowerPoint and Excel. You can see how the Office add-ins enhance SideKick 365 CRM by watching the video at this link - <https://SkyLitesystems.com/sidekick-365-crm-videos>

The SideKick 365 CRM add ins are available for no extra charge. If you want to try the add-ins yourself, we can send them to you and you can install and configure them to use with this demo site or your site if you have already installed SideKick 365 CRM into your Office 365 tenant. Just send us an email at info@SkyLitesystems.com and we will send them out to you immediately.

Section 3 – SideKick 365 CRM Mobile - Demo

We have developed a powerful PowerApps app that will give you a great mobile interface to the SharePoint data stored in the SideKick 365 CRM app. We think you will find the PowerApps app a great way to view, edit, and add new data to SideKick 365 CRM on the go.

SideKick 365 CRM Mobile – Purpose and Vision

SideKick 365 CRM Mobile is not intended to offer every feature of the full SideKick 365 CRM app described in section one of this guide. Here are some general points to consider.

- SideKick 365 CRM Mobile does not let you set up campaigns, products, security profiles, or modules used for the PowerBI reports like SalesPeople, Sales Goals and Sales Stages.
- SideKick 365 CRM Mobile does let you view, edit, and add Accounts, Contacts, Opportunities, Tasks, Projects, and Notes and view related files (docs).

Our guiding principle for SideKick 365 CRM Mobile is simple. We give your mobile users access to the information they need to be productive and produce results and ability to add or edit that data as needed wherever they are.

NOTE - You can view the app on your phone by downloading the PowerApp App to your phone. Send us an email at Info@SkyLitesystems.com if you want to set up a test on your phone. For this demo, we'll take a look at the PowerApp for SideKick 365 CRM on your PC. The app runs the same on the PC as it would on your phone or tablet if you were on the go.

VERY IMPORTANT - Recall that all the data in SideKick 365 CRM Mobile and the SharePoint SideKick 365 CRM app are stored in the SAME SharePoint lists, so users in the office can use the SharePoint App to access, add, and update items , while mobile users can use SideKick 365 CRM Mobile to do the same using SideKick 365 CRM Mobile. Same data – different apps optimized for different platforms – NICE!

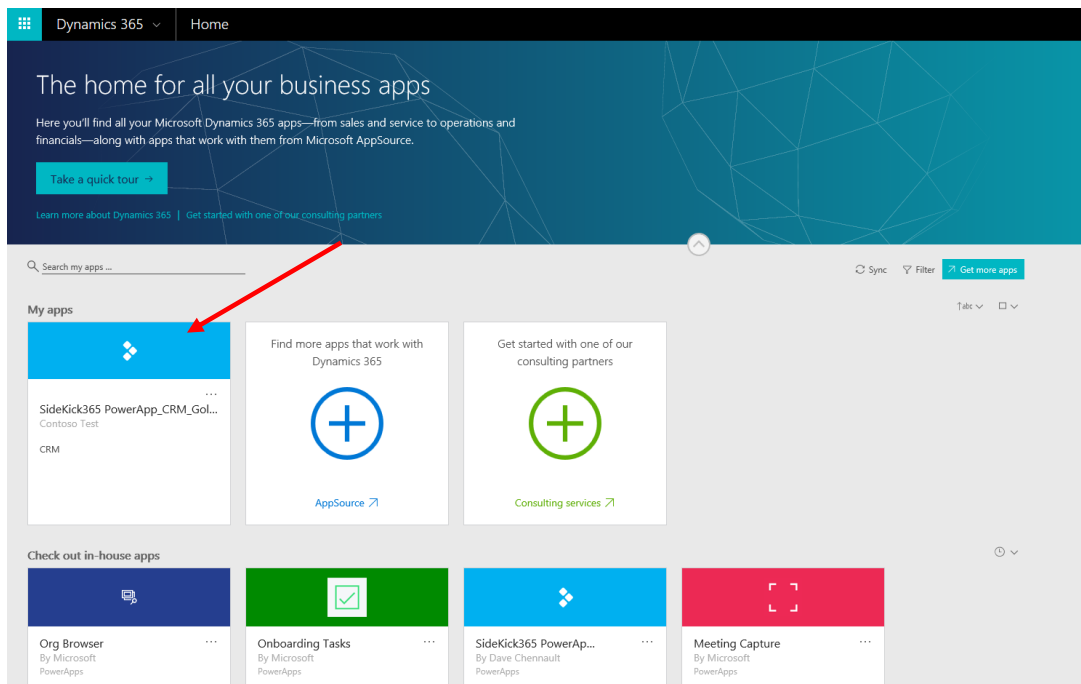
Now that you understand the purpose of SideKick 365 CRM, let's log in and take a look.

Logging In

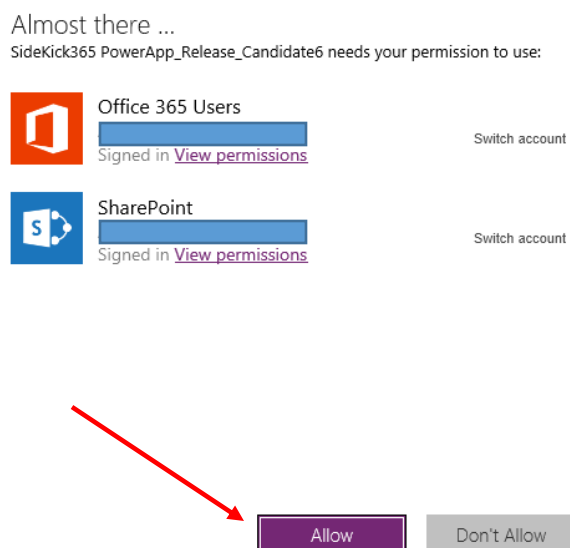
1. Copy this web address in your browser
 - a. <https://home.dynamics.com>
2. When you see the log-in screen, type in
 - a. user name: [DEMO USER 1 THAT WE SEND YOU](#)
 - b. password: [DEMO USER 1 THAT WE SEND YOU](#)

You will see tiles for apps as shown below.

Go ahead and select the “SideKick 365 CRM PowerApp” tile as shown below

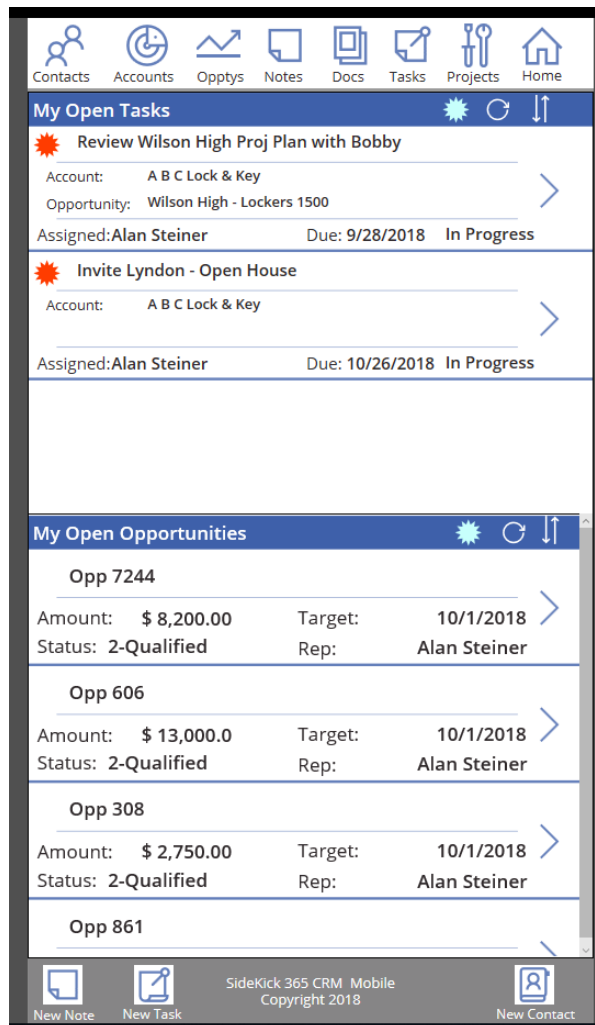


After clicking on the SideKick 365 CRM App tile, you will be asked to log into SharePoint and the Office 365. Go ahead and select the “Allow” button.



SideKick 365 CRM Mobile Home Page

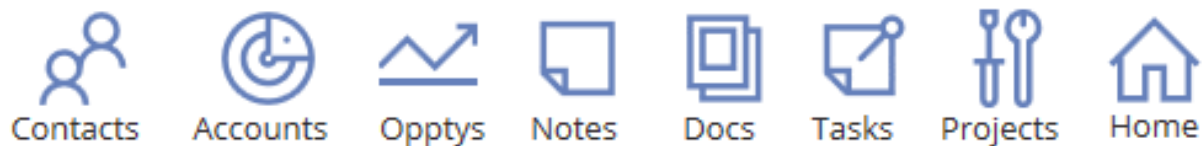
After a moment, you will be taken to the home page of SideKick 365 CRM Mobile – our PowerApp version of SideKick 365 CRM as shown below.



Let's dig in a bit...

Navigation

The top of the screen has the core navigation buttons used through the app. Selecting any of these buttons will take you to a list of items associated with that module.



Task and Opportunity Lists

A list of Tasks assigned to Alan Steiner and Opportunities associated with Alan Steiner as the Sales Rep appear in two lists on the home page. The tasks and Opportunities shown on the home page are filtered to show you only the Open Tasks and Open Opportunities that you are assigned to.

The buttons at the top of Tasks and Opportunities (shown below) include the following capabilities

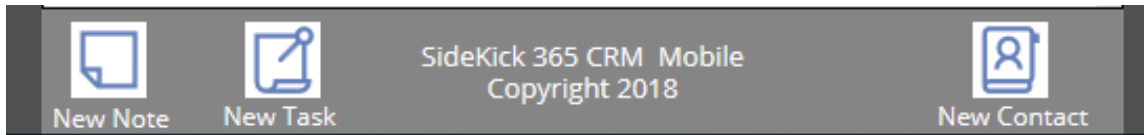


- Hot Filter – Selecting the “Blue Sun” changes the button to Red and filters the list to show the “Hot” items in that list. Hot items show a “Red Sun” in the listing - as shown in the top two open Tasks. The Hot Filter button is a toggle, so click it on or off by selecting it. Go ahead and give it a try.
- Refresh Data – “Circle Arrow” – Selecting this button make a request to get the latest data for that list. Hitting Refresh makes a round trip to the SharePoint lists to get any new data that may have been entered since the home page was opened.
- Sort – The Up/Down Arrow button sorts the list in ascending or descending order.
 - The Sort button in Tasks sorts by the Task title while
 - The Sort button in Opportunities sorts by expected close date

These sort settings are configurable if you want to sort by different field – NICE!

The screenshot displays a mobile application interface with a top navigation bar containing icons for Contacts, Accounts, Opptys, Notes, Docs, Tasks, Projects, and Home. Below the navigation bar, there are two main sections: 'My Open Tasks' and 'My Open Opportunities'. Each section has a blue header with a sun icon, a refresh icon, and a sort icon. The 'My Open Tasks' section lists two tasks: 'Review Wilson High Proj Plan with Bobby' and 'Invite Lyndon - Open House'. The 'My Open Opportunities' section lists four opportunities: 'Opp 7244', 'Opp 606', 'Opp 308', and 'Opp 861'. Each opportunity entry shows details such as Amount, Target, Status, and Rep. At the bottom of the screen, there are icons for 'New Note', 'New Task', and 'New Contact', along with the text 'SideKick 365 CRM Mobile Copyright 2018'.

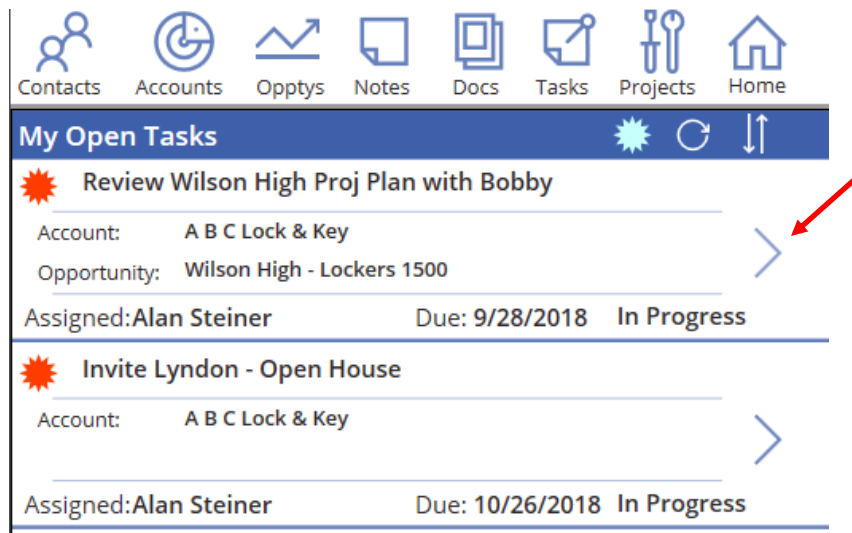
Do you see the buttons at the bottom of the page? These are shortcuts to add a new Note, Task, or Contact. They let you quickly add Notes and Tasks to Accounts, Opportunities or Projects or add a new Contact that can be associated with an Account, Opportunity, or Project.



Go ahead and click on a button to see how these shortcut buttons work.

Opening a Task or Opportunity

You can open an opportunity or task by selecting the right facing arrow as shown below.



Go ahead and select any of the tasks and Opportunities to learn how easy it is to navigate within SideKick 365 CRM Mobile. Just elect the Home button to return to this home page.

Wow, that was a lot of information to cover. Hopefully, you are starting to see how powerful SideKick 365 CRM Mobile is! Let's dive into the modules and learn more about how SideKick 365 CRM mobile can help you close more deals.

Account Module - SideKick 365 CRM Mobile

The PowerApp version of the SideKick 365 CRM Account Detail screen has all the data you see in the SharePoint view via the browser, but is has been optimized to render quickly on a phone or tablet. Let's take a look.

The Account Detail Screen has the basic account information like the account name, territory, salesperson, address and some general notes about the account. Information is shown in a compressed format when you first open the account screen as shown below. You will notice that the top half of the account detail shows basic information, while the bottom half shows tabs of important related items in other modules.

You can easily see all of the account general information by selecting the magnifying glass with a "+" in it. Lets compare the two views.

The view below is compressed view

The screenshot displays the mobile interface for an account. At the top, there is a navigation bar with icons for Contacts, Accounts, Opps, Notes, Docs, Tasks, Projects, and Home. Below this is a header for the 'Account' screen, featuring a close button, a toggle for 'Main Contact', and search icons. The main content area is divided into several sections:

- Account Name:** ABC Lock and Key, with a 'Hot' status indicator and a checkmark.
- Account Type:** Customer
- Territory:** West
- Parent:** Salesperson
- Salesperson:** Alan Steiner
- Website:** www.ABCLockandKey.Com
- Phone:** (empty field)
- Fax:** (empty field)

Below the account information is a tabbed interface with tabs for 'Tasks', 'Notes', 'Docs', 'Contacts', and 'Opps'. The 'Tasks' tab is active, showing a list of tasks with columns for 'Due Date', 'Assigned To', and 'Title'.

Due Date	Assigned To	Title
10/26/2018	Alan Steiner	Send Lyndon Specs on...
11/23/2018	Dave Chennault	Send Lyndon a Holiday...

Below the task list is a detailed view of a task:

Title	Due Date
Send Lyndon Specs on DOD Complai	10/26/2018
Task Status	Assigned To
In Progress	Alan Steiner
Task Description	Comments
Lyndon has an upcoming bid that we want to win. Make sure to send him teh specs on the DOD Complaint lock 223 so he	

The screenshot below shows the account detail after selecting the magnifying glass with the “+” in it.

Contacts Accounts Opptys Notes Docs Tasks Projects Home

Account Main Contact

* Account Name Hot
ABC Lock and Key

Account Type	Territory
Customer	West
Parent	Salesperson
	Alan Steiner

Website
www.ABCLockandKey.Com

Phone	Fax
415-283-1956	415-787-0900

Street, City, State, Zip, and Country
200 California Street
San Francisco CA
94111 USA

Billing Adress the Same

Billing Street, City, State, Zip, and Country
200 California Street
San Francisco CA
94111 USA

Main Contact
Lyndon Bellerdine

General Notes
Good customer who likes to attend trade shows...

Profile	Campaign
Alan_S_Profile	Spring Fling TradeShow

Select the Magnifying glass with the “-“ in it to see the compressed view with that Tabs again

The screenshot shows a mobile application interface with a top navigation bar containing icons for Contacts, Accounts, Optys, Notes, Docs, Tasks, Projects, and Home. Below this is a secondary bar with a close button, 'Account' label, a toggle switch for 'Main Contact', and magnifying glass icons with '+' and '-' signs.

The main content area displays account details for 'ABC Lock and Key'. The 'Account Name' field is highlighted in red and has a 'Hot' status indicator with a checkmark. Other fields include 'Account Type' (Customer), 'Territory' (West), 'Parent' (Salesperson), and 'Salesperson' (Alan Steiner). The 'Website' is 'www.ABCLockandKey.Com'. There are also fields for 'Phone' and 'Fax'.

Below the account details is a tabbed interface with buttons for 'Tasks', 'Notes', 'Docs', 'Contacts', and 'Opps'. A secondary bar contains 'Edit', 'New', 'Refresh', 'Cancel', and 'Save' buttons.

A task list is displayed with the following data:

Due Date	Assigned To	Title
10/26/2018	Alan Steiner	Send Lyndon Specs on...
11/23/2018	Dave Chennault	Send Lyndon a Holiday...

Below the task list, a detailed view of a task is shown:

Title	Due Date
Send Lyndon Specs on DOD Complai...	10/26/2018
Task Status	Assigned To
In Progress	Alan Steiner
Task Description	Comments
Lyndon has an upcoming bid that we want to win. Make sure to send him teh specs on the DOD Complaint lock 223 so he	

Also note there is a toggle button at the top. Select the toggle to show the main contact associated with this account details.

The screenshot shows a mobile application interface with a top navigation bar containing icons for Contacts, Accounts, Opptys, Notes, Docs, Tasks, Projects, and Home. Below this is a sub-header for 'Account' with a toggle switch set to 'Main Contact' and search icons. The main content area displays contact information for Lyndon Bellerdine, including title (Owner), phone number (415-283-1956), and a note: 'Lyndon is a good guy!'. Below the contact details is a tabbed interface with 'Tasks' selected. The tasks list shows two items: 'Send Lyndon Specs on...' due 10/26/2018 assigned to Alan Steiner, and 'Send Lyndon a Holiday...' due 11/23/2018 assigned to Dave Chennault. A detailed view of the first task is shown below, including fields for Title, Due Date, Task Status, Assigned To, Task Description, and Comments.

Lyndon Bellerdine
 Title: Owner
 Phone: 415-283-1956
 Cell:
 Email:
 Lyndon is a good guy!

Tasks | Notes | Docs | Contacts | Opps

Edit | New | Refresh | Cancel | Save

Due Date	Assigned To	Title
10/26/2018	Alan Steiner	Send Lyndon Specs on...
11/23/2018	Dave Chennault	Send Lyndon a Holiday...

Title	Due Date
Send Lyndon Specs on DOD Complair	10/26/2018
Task Status	Assigned To
In Progress	Alan Steiner
Task Description	Comments
Lyndon has an upcoming bid that we want to win. Make sure to send him teh specs on the DOD Complaint lock 223 so he	

Then select the Toggle to switch the view back to the main Account view again

The screenshot displays a CRM interface with a top navigation bar containing icons for Contacts, Accounts, Optys, Notes, Docs, Tasks, Projects, and Home. Below this is a sub-header for 'Account' with a toggle switch set to 'Main Contact'. The main content area shows account details for 'ABC Lock and Key', including Account Type (Customer), Territory (West), Parent (Salesperson), and Website (www.ABCLockandKey.Com). Below the details are tabs for Tasks, Notes, Docs, Contacts, and Opps. A task list table is visible, showing tasks assigned to Alan Steiner and Dave Chennault. A detailed view of a task is shown at the bottom, including its title, due date, status, and description.

Due Date	Assigned To	Title
10/26/2018	Alan Steiner	Send Lyndon Specs on...
11/23/2018	Dave Chennault	Send Lyndon a Holiday...

Title	Due Date
Send Lyndon Specs on DOD Complai...	10/26/2018

Task Status	Assigned To
In Progress	Alan Steiner

Task Description	Comments
Lyndon has an upcoming bid that we want to win. Make sure to send him teh specs on the DOD Complaint lock 223 so he	

Tabs within the Account Detail Screen

There are five tabs that are used to add, edit, and review items that are related to the account. Let's look at each of the tabs within the Account Detail Screen:

Tasks

The tasks tab lists all the tasks associated with the account. You can add or edit a task using the buttons within the Tasks module.

Tip – When you add a Task within the PowerApp, it may take up to 20 seconds for that new task to appear in the list. The delay is caused because a workflow is running the apply permissions to the task so only users with proper permissions will be able to see the Task. The permission applied to the Task is the same as the one assigned to the Account.

Notes

The Notes tab has items that and list of all the Notes associated with the Account. Notes are useful because they let you write down important thoughts that are less structured than a task or document.

Tip – Notes have a useful reminder capability. The person with the email address in the note will get a reminder email with a link to this Note if you select the "Follow Up" Checkbox and put in a Date and Email. The Date field is the date that the email will be sent to the user named in the Email field.

You can add and edit notes using the buttons shown below. Make sure to hit the refresh button after adding a new note to see it listed in the Notes list.

The screenshot displays the Account Detail Screen with the following elements:

- Navigation Bar:** Contacts, Accounts, Oppty, Notes, Docs, Tasks, Projects, Home.
- Account Header:** Account (Main Contact) with search and refresh icons.
- Account Information:**
 - * Account Name: ABC Lock and Key (Hot checkbox checked)
 - Account Type: Customer; Territory: West
 - Parent: ; Salesperson: Alan Steiner
 - Website: www.ABCLockandKey.Com
 - Phone: ; Fax:
- Tab Bar:** Tasks, Notes (selected), Docs, Contacts, Opps.
- Note List:**
 - Note Title: Send Lyndon an Email Today
 - Lyndon Called Me
 - Call Lyndon about LA Unified Oppty
- Note Detail Form:**
 - * Send Lyndon an Email Today
 - To-Do: ; Follow Up: ; Date: 9/28/2018
 - Email: AlanS@skylitesystems.com
 - Text: Make sure to send Lyndon an Email today and remind him about the open house
- Action Bar:** Edit, New, Refresh, Note Title, Cancel, Save.

Docs

The Docs tab shows documents that are associated with the account. The documents can be viewed by selecting the “View File” button in the window below the list of documents.

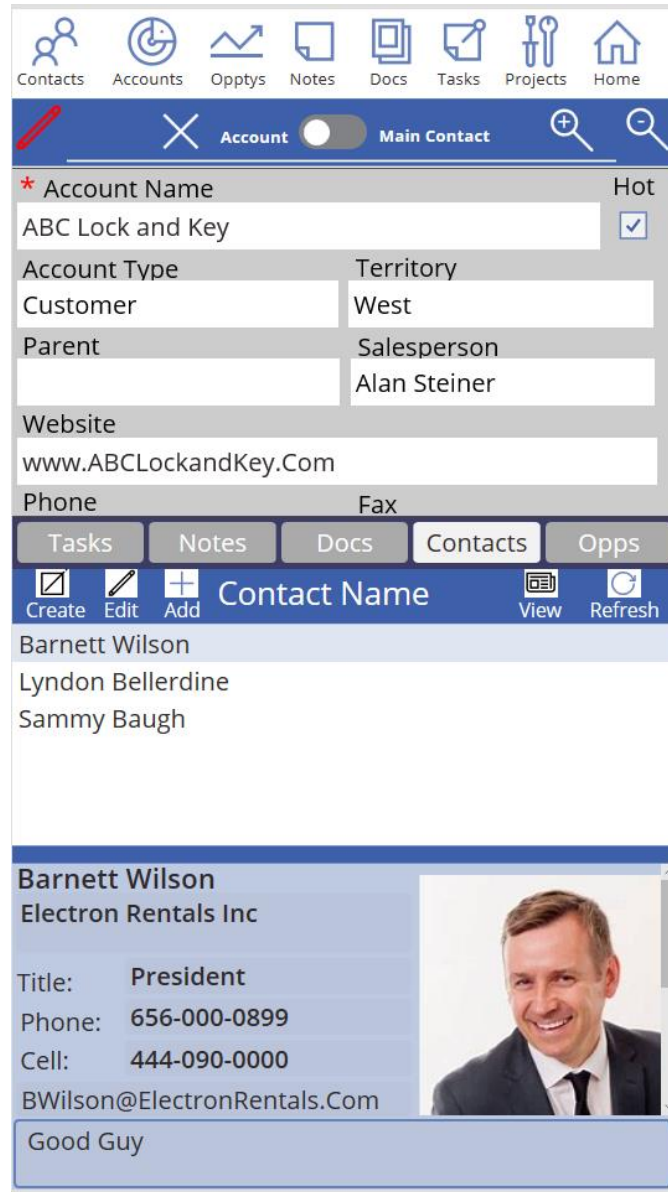
The screenshot displays a software interface with a navigation bar at the top containing icons for Contacts, Accounts, Opptys, Notes, Docs, Tasks, Projects, and Home. Below the navigation bar is a header section with a close button, an 'Account' label, a toggle switch, and the text 'Main Contact'. The main content area is divided into several sections: a 'Hot' status section with a checkbox, an 'Account Type' section with 'Customer' and 'Territory' with 'West', a 'Parent' section with 'Salesperson' and 'Alan Steiner', and a 'Website' section with 'www.ABCLockandKey.Com'. Below these sections are tabs for 'Tasks', 'Notes', 'Docs', 'Contacts', and 'Opps'. The 'Docs' tab is active, showing a list of document filenames: '291_rekeying_instructions', 'DOD Lock Program', 'Check 2345 from Brooke Blend', 'Meeting Notes', and 'ABC Lock and Key -Safe Maintenance - Quote'. At the bottom of the interface is a large blue button labeled 'View File'.

Contacts

This list shows the Contacts associated with the Account. You can add an existing contact by selecting the Add button. You can also Edit contact information here and the edited information will show up everywhere in the app. Finally you can add a new Contact and this Contact will then be available to associate with a Project, Opportunity, or another Account.

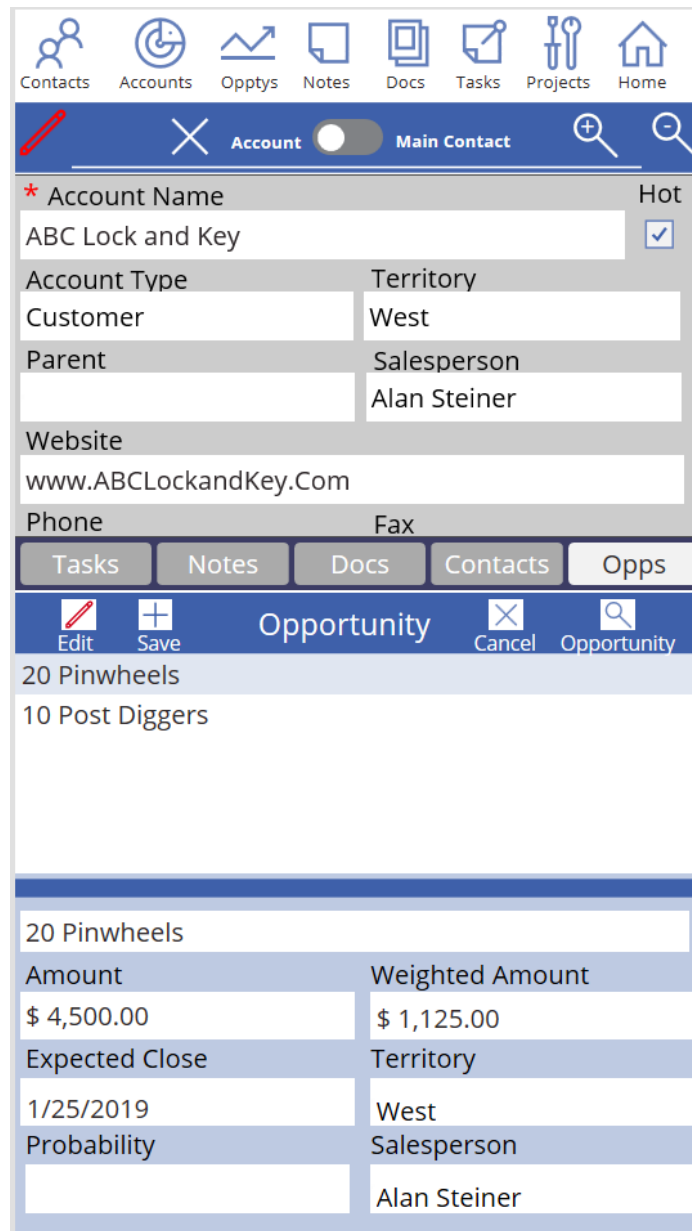
You can also see the a full page listing of accounts by selecting the “View Button”

Tip – Adding a brand new Contact is easy. Once you hit save in the new account, it will take about 20 seconds for the new Contact to be associated with the Account. To view the new associated account, wait 20 seconds then hit he Contacts tab and Refresh. The delay is due to a workflow running on the server and creating a record to associate the Contact with the Account.



Opps

The Opps tab shows Opportunities associated with an Account. You can Edit an Opportunity and save those edits and you can also jump to the Opportunity Detail screen by selecting the Smaller Magnifying Glass in the Opportunity Section.



Amount	Weighted Amount
\$ 4,500.00	\$ 1,125.00

20 Pinwheels	
10 Post Diggers	

20 Pinwheels	
Amount	Weighted Amount
\$ 4,500.00	\$ 1,125.00
Expected Close	Territory
1/25/2019	West
Probability	Salesperson
	Alan Steiner

Opportunities Module

Opportunities are always associated with an Account.

Tip - You must create an Account before you can create an Opportunity.

Creating an Opportunity is Easy, just hit the New button in the Opportunity List below and then make sure to fill out all required fields. A Required field has a red star beside the title as shown below

2fproviders%2fMicrosoft.PowerApps%2fapps%2f92345ab9-57b5-4631-8fbe-cf6d2851efc1

Contacts Accounts Opptys Notes Docs Tasks Projects Home

Opportunity

* Opportunity Name
20 Pinwheels Hot

* Account
ABC Lock and Key Closed

Sales Stage Weight
3-Presentation 25

Amount Weighted Amount
\$ 4500.00 \$ 1,125.00

* Expected Close Date Close Date
1/25/2019 12/31/2001

Salesperson Profile
Alan Steiner Find items

Territory Contact new
West Barnett Wilson

General Notes
This is a solid opportunity that we need to pursue

Outcome Category
Find items Find items

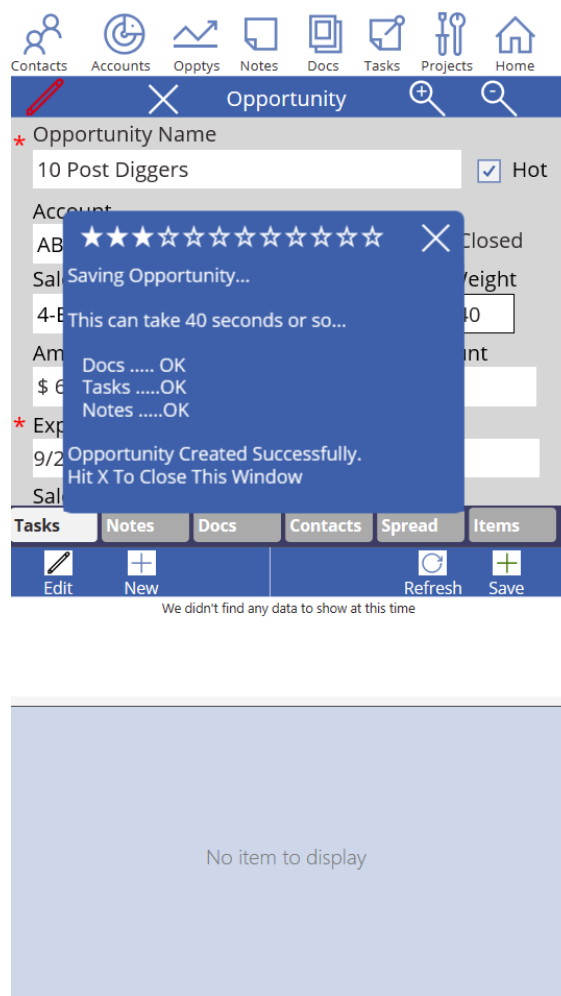
Reason For Outcome

Saving a new Opportunity

SideKick 365 CRM is a sophisticated app. When you save a new Opportunity, a workflow starts on the server and the workflow applies security permissions to the Opportunity and sets up all the data structures needed to store items related to that Opportunity like Tasks, Notes and Documents.

SideKick 365CRM will display a message that updates as the workflow creates the data structures necessary to store the associated items. The screenshot below shows the message that tells you the workflow ran as expected and the Opportunity is now ready to store related docs, tasks, notes and all other associated items accessed via the Tabs.

Tip – Accounts, Opportunities, and Tasks all run a workflow when you create a new one. They all display a progress message and require 20 to 40 seconds to set up.



Tabs in Opportunities

Opportunities have six (6) tabs in the PowerApp. The tabs are used to view items that are related to an opportunity.

Tip – Any related item added to an Opportunity (like a Notes, Document, or Task) will have the same security profiles and permissions as the Opportunity. Think of the Opportunity as the Parent and the related items are Child items. The same concept applies to Accounts and Projects. The Child items always inherit permissions from the Parent (Account, Opportunity, or Project).

Tasks

The tasks tab lists all the tabs associated with the Opportunity. You can add or edit a task using the buttons within the Tasks module.

Tip – When you add a Task within the PowerApp, it may take up to 20 seconds for that new task to appear in the list. The delay is caused because a workflow is running the apply permissions to the task so only users with proper permissions will be able to see the Task. The permission applied to the Task is the same as the one assigned to the Opportunity.

The screenshot displays the PowerApp interface for an Opportunity. At the top, there is a navigation bar with icons for Contacts, Accounts, Opptys, Notes, Docs, Tasks, Projects, and Home. Below this is a header for the 'Opportunity' form, which includes a search icon and a close icon. The form fields are as follows:

- Opportunity Name:** 20 Pinwheels (with a 'Hot' checkbox checked)
- Account:** ABC Lock and Key (with a 'Closed' checkbox unchecked)
- Sales Stage:** 3-Presentation
- Weight:** 25
- Amount:** \$ 4,500.00
- Weighted Amount:** \$ 1,125.00
- Expected Close Date:** 1/25/2019
- Close Date:** 12/31/2001
- Salesperson:** (empty)
- Profile:** (empty)

Below the form is a tabbed interface with 'Tasks' selected. The 'Tasks' tab contains a list of tasks:

Title	Due Date
Call Lyndon on Monday	7/16/2018
Ask Lyndon about new Products	7/27/2018

Below the task list is a detailed view of a task:

- Title:** Call Lyndon on Monday
- Due Date:** 7/16/2018
- Task Status:** In Progress
- Assigned To:** Alan Steiner
- Hot:** (checkbox checked)
- Task Description:** Call Lyndon and ask about the status of the Pinwheel Order.
- Comments:** Need to stay on top of this

At the bottom of the screen, there is a navigation bar with buttons for Edit, New, Refresh, Cancel, and Save.

Notes

The Notes tab has items that and list of all the Notes associated with the Opportunity. Notes are useful because they are less structured than a Task let you write down important thoughts about the Opportunity.

Tip – Notes have a useful reminder capability. The person with the email address in the note will get a reminder email with a link to this Note if you select the “Follow Up” Checkbox and put in a Date and Email. The Date field is the date that the email will be sent to the user named in the Email field.

You can add and edit notes using the buttons shown below. Make sure to hit the refresh button after adding a new note to see it listed in the Notes list.

The screenshot displays the SkyLite Systems software interface. At the top, there is a navigation bar with icons for Contacts, Accounts, Opptys, Notes, Docs, Tasks, Projects, and Home. Below this is a blue header bar for the 'Opportunity' form, which includes a pencil icon for editing, a close button, and search icons. The form fields are as follows:

- Opportunity Name:** 20 Pinwheels (with a 'Hot' checkbox checked)
- Account:** ABC Lock and Key (with a 'Closed' checkbox unchecked)
- Sales Stage:** 3-Presentation
- Weight:** 25
- Amount:** \$ 4,500.00
- Weighted Amount:** \$ 1,125.00
- Expected Close Date:** 1/25/2019
- Close Date:** 12/31/2001
- Salesperson:** Profile

Below the form fields is a tabbed interface with 'Notes' selected. The 'Notes' section has a blue header with 'Note Title' and buttons for Edit, New, Refresh, Cancel, and Save. The notes list contains two entries:

- Lyndon Called about New Designs
- Call James and ask about Color Options

The second note is expanded, showing a table with two columns: 'Call James and ask about Color Optio' and 'Action Required'. The table contains one row of text: '7-15-18 Call James add new color options for the Pinwheels.'

At the bottom of the note, there is a 'Follow Up' checkbox (unchecked), a 'Follow Up Date' field with the value '7/16/2018', and an 'Email' field with the value 'AlanS@skylitesystems.com'.

Docs

The Docs tab shows documents that are associated with the account. The documents can be viewed by selecting the “View File” button in the window below the list of documents.

The screenshot displays a CRM interface for an Opportunity record. At the top, a navigation bar includes icons for Contacts, Accounts, Opptys, Notes, Docs, Tasks, Projects, and Home. Below this is a blue header for the 'Opportunity' record, featuring a pencil icon for editing, a close button, and search icons. The main form contains the following fields:

- Opportunity Name:** 20 Pinwheels (with a red asterisk), Hot (checked checkbox)
- Account:** ABC Lock and Key (with a red asterisk), Closed (unchecked checkbox)
- Sales Stage:** 3-Presentation, **Weight:** 25
- Amount:** \$ 4,500.00, **Weighted Amount:** \$ 1,125.00
- Expected Close Date:** 1/25/2019 (with a red asterisk), **Close Date:** 12/31/2001
- Salesperson:** Profile

Below the form is a tabbed interface with 'Tasks', 'Notes', 'Docs', 'Contacts', 'Spread', and 'Items'. The 'Docs' tab is active, showing a 'Refresh' button and a 'Title' field. The document title is 'Inspection' with the subtitle 'The DoD Lock Program Overview'. At the bottom of the window is a large blue button labeled 'View File'.

Contacts

This list shows the Contacts associated with the Account. You can add an existing contact by selecting the Add button. You can also Edit contact information here and the edited information will show up everywhere in the app. Finally, you can add a new Contact and this Contact will then be available to associate with a Project, Opportunity, or another Account.

You can also see the a full page listing of Contact Record by selecting the “View Button”

The screenshot displays the SideKick 365 CRM interface. At the top, there is a navigation bar with icons for Contacts, Accounts, Opptys, Notes, Docs, Tasks, Projects, and Home. Below this is a sub-header for 'Opportunity' with a close button and search icons. The main form contains the following fields:

- Opportunity Name:** 20 Pinwheels (with a 'Hot' checkbox checked)
- Account:** ABC Lock and Key (with a 'Closed' checkbox unchecked)
- Sales Stage:** 3-Presentation
- Weight:** 25
- Amount:** \$ 4,500.00
- Weighted Amount:** \$ 1,125.00
- Expected Close Date:** 1/25/2019
- Close Date:** 12/31/2001

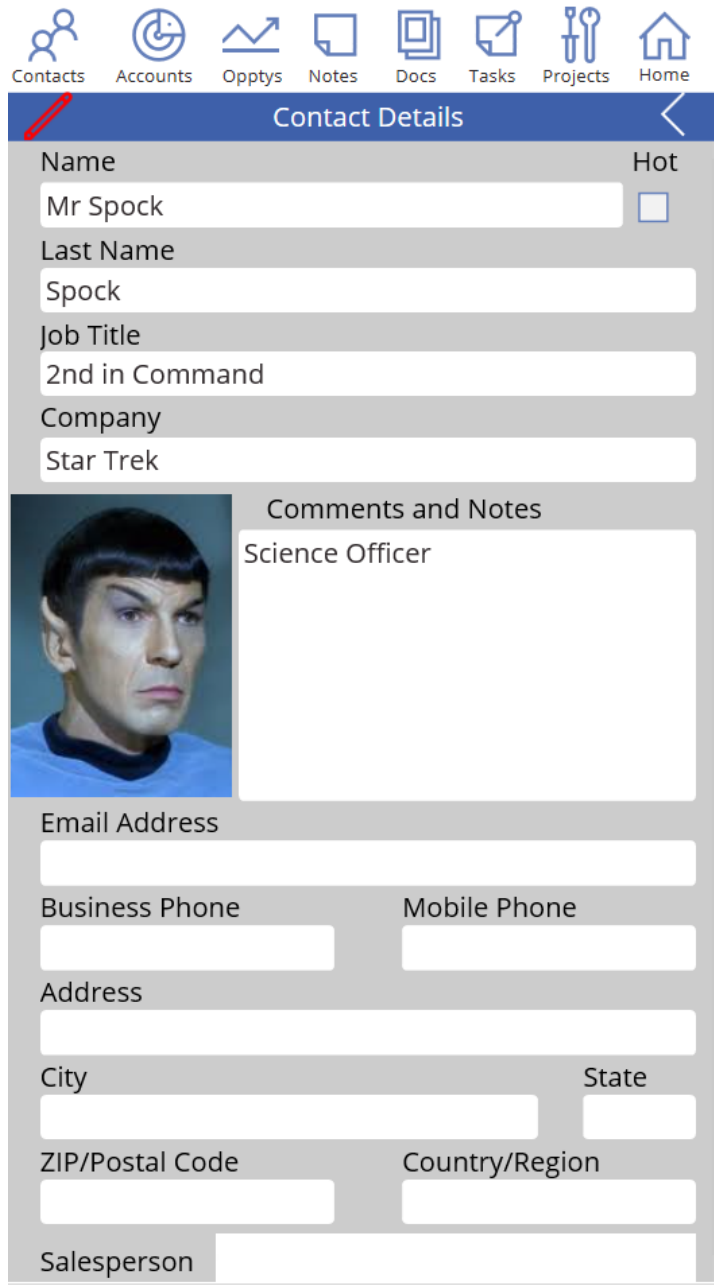
Below the form is a 'Salesperson' section with a 'Profile' button. A tabbed interface shows 'Contacts' selected, with other tabs for Tasks, Notes, Docs, Spread, and Items. At the bottom, there are buttons for 'Create', 'Edit', 'Add', 'View', and 'Refresh'. The contact list shows 'Barnett Wilson', 'Eddie Van Halen', and 'Mr Spock'. The 'Mr Spock' contact is expanded to show a profile card with the following details:

- Name:** Mr Spock
- Company:** Star Trek
- Title:** 2nd in Command
- Phone:** 444-090-0900
- Cell:** 555-909-0090
- Email:** MSpock@Enterprise.Com
- Role:** Science Officer

A photo of Mr. Spock is displayed next to the contact details.

Tip – Adding a new Contact to SideKick 365 CRM is easy. Once you hit save in the new account, it will take about 15 seconds for the new Contact to be associated with the Account. To view the new associated account, wait 15 seconds then hit the Contacts tab and Refresh. The delay is due to a workflow running on the server and creating a record to associate the Contact with the Account.

The screenshot below shows the full screen view of the Contact. Hit the View button next to Refresh in the screenshot above to see a full screen view of the Contact. Once you are in the full screen of the Contact shown below, hit the Arrow above the "Hot" field to navigate back to the Opportunity.



Contacts Accounts Opptys Notes Docs Tasks Projects Home

Contact Details

Name Hot

Last Name

Job Title

Company

 Comments and Notes
Science Officer

Email Address

Business Phone Mobile Phone

Address

City State

ZIP/Postal Code Country/Region

Salesperson

Spread

Spread is an interesting capability that we added to SideKick 365 CRM. Our customers told us that an opportunity may have a revenue that is spread over several days, weeks, months or years. Rather than entering an opportunity for each time an Opportunity has revenue, you can enter a single Opportunity and then “spread” the value to forecast when that revenue will be realized. The screenshot below shows Spread in use

The screenshot shows the SideKick 365 CRM interface for an Opportunity. The top navigation bar includes icons for Contacts, Accounts, Opptys, Notes, Docs, Tasks, Projects, and Home. The Opportunity form is titled "Opportunity" and contains the following fields:

- Opportunity Name: 20 Pinwheels (with a "Hot" checkbox checked)
- Account: ABC Lock and Key (with a "Closed" checkbox unchecked)
- Sales Stage: 3-Presentation (with a "Weight" field set to 25)
- Amount: \$ 4,500.00 (with a "Weighted Amount" field set to \$ 1,125.00)
- Expected Close Date: 1/25/2019 (with a "Close Date" field set to 12/31/2001)
- Salesperson: Profile

Below the form is a "Spread" tab with a table of entries. The table has columns for "Date" and "Amount". The entries are:

Date	Amount
1/31/2019	2200
2/28/2019	800
3/31/2019	1500

At the bottom of the screenshot, there is a summary table with the following data:

Date	Amount
1/31/2019	\$ 2,200.00

Tip – Spread is optional but if you want to use it then you should spread every opportunity even if that opportunity only has revenue in a single period of time. This will make your reports accurate if you report on the Spread entries.

You can add or edit Spread entries using the buttons shown above.

Note – Formatting the amount as currency within the grid view is not presently supported in PowerApps

Items

Items are the products or services that you want to associated with the Opportunity. The Product dropdown shown in the Items detail allows you to select products or services that are managed within the Products module within the SharePoint version of SideKick 365 CRM.

The screenshot shows the 'Opportunity' form in SideKick 365 CRM. The top navigation bar includes icons for Contacts, Accounts, Opptys, Notes, Docs, Tasks, Projects, and Home. The main form area is titled 'Opportunity' and contains the following fields:

- Opportunity Name:** 10 Post Diggers (with a 'Hot' checkbox checked)
- Account:** ABC Lock and Key (with a 'Closed' checkbox unchecked)
- Sales Stage:** 4-Evaluating
- Weight:** 40
- Amount:** \$ 600.00
- Weighted Amount:** \$ 240.00
- Expected Close Date:** 9/28/2018
- Close Date:** 12/31/2001
- Salesperson:** Profile

Below the form fields is a tabbed interface with 'Items' selected. The 'Items' tab shows a table with the following data:

Product	Quantity	Amount	Weighted Amount
Post Digger	10	600	

Below the table is a detailed view of the selected item:

- Product:** Post Digger
- Quantity:** 10
- Description:** 4 Foot Tall Post Hole Digger - Up to 20 Inch Wide Post Holes
- Cost:** \$ 42.50
- Price:** \$ 60.00
- Total Cost:** \$ 425.00
- Total Price:** \$ 600.00
- Weight:** 7
- Total Weight:** 70

Hint - You can type a few letters or characters in the Product dropdown with the item detail and the choice of Product options will narrow.

Projects

The Projects Module is used to manage projects you are working on. Projects can be associated with an Account, an Opportunity, or they can be stand-alone. You can assign a security profile to a project to limit access and any child item associated with the Project will share the security profile. We will walk through the child lists associated with a Project.

Tasks

Tasks can be associated with a project. These tasks will show up on the home page if they are open and assigned to you. They will also be available in the Tasks Module. The screenshot below shows tasks associated with a Project.

The screenshot displays a 'Project' form with the following fields:

- Project:** Oppty 46 and Gagen Acct
- Start:** 6/28/2018
- End:** 6/29/2018
- Owner:** Dave Chennault
- Hot:**
- Status:** Open
- Profile:** (empty)
- Description:** This is a POC for Will Gagen. The purpose is to understand how the new Pinwheel design could work in their new lineup of products.

Below the form is a navigation bar with tabs for Tasks, Notes, Docs, and Contacts. Under the 'Tasks' tab, there are buttons for Edit, New, Refresh, Cancel, and Save.

Title	Due Date
Call Will about the Gagen Project	7/31/2018
Invite Will to the Fall Golf Outing	9/28/2018

Assigned To	Task Status
Alan Steiner	In Progress
Task Description	Comments
7-17-18 Call Will and ask him if the Project is on track. Find out if he needs anything. Call him ASAP.	

Tip - A Task can be added to a Project using the Task quick link at the bottom of the Home Page

Notes

A Project can have Notes associated with it. Notes are not as formal as Tasks, but they can have an email reminder associated with the Note.

The screenshot displays a software interface with a top navigation bar containing icons for Contacts, Accounts, Opptys, Notes, Docs, Tasks, Projects, and Home. Below this is a 'Project' form with the following fields:

- Project: Oppty 46 and Gagen Acct
- Start: 6/28/2018, End: 6/29/2018
- Owner: Dave Chennault, Hot:
- Status: Open
- Profile: (empty)
- Description: This is a POC for Will Gagen. The purpose is to understand how the new Pinwheel design could work in their new lineup of products.

Below the project form is a 'Note' form with tabs for Tasks, Notes, Docs, and Contacts. The 'Note' form includes the following fields:

- Buttons: Edit, New, Refresh, Note, Cancel, Save
- Title: Gagen Project Specs
- Content: Will Gagen on Good Morning Boston
- Background: Will Gagen on Good Morning Boston
- Description: 8-19-18 Will Gagen will hve a 5 minute interview with Megyn Gagen about his business on Good Morning Boston during the 7 AM segment.
- Follow Up: Follow Up, Follow Up Date: 8/19/2018
- Email: AlanS@SkyliteSystems.com

Tip - A Note can be added to a Project using the Task quick link at the bottom of the Home Page

Documents

A Project can have Documents associated with it. Select the view document button to launch a document viewer capable of reviewing the document associated with the Project.

The screenshot shows a web application interface. At the top, there is a navigation bar with icons for Contacts, Accounts, Opptys, Notes, Docs, Tasks, Projects, and Home. Below this is a blue header bar with a close button (X), the word "Project", and zoom in (+) and zoom out (-) icons. The main content area is a form for a project named "William Tell Project". The form fields include: Project name: William Tell Project; Start date: 6/27/2018; End date: 7/27/2018; Owner: Dave Chennault; Hot status: checked (checkbox); Status: Open; Profile: (empty field); Description: This is a new project for William Tell. They are a new client so we are doing the POC at cost. Below the form are four tabs: Tasks, Notes, Docs, and Contacts. The "Docs" tab is active, showing a document viewer. The document title is "MrSpock" and the content is "Rekey instructions Inspection".

Project	William Tell Project	
Start	6/27/2018	End 7/27/2018
Owner	Dave Chennault	Hot <input checked="" type="checkbox"/>
Status	Open	
Profile		
Description	This is a new project for William Tell. They are a new client so we are doing the POC at cost.	

Tasks Notes Docs Contacts

Filename

MrSpock

Rekey instructions
Inspection

[View File](#)

Contacts

A Project can have many contacts associated with it. You can add an existing contact from Contacts already in the app or you can add a new Contact here and it will be added to the Contact module and be associated with this Project. Finally, you can edit the contact info here and the changes will be reflected everywhere.

The screenshot shows a mobile application interface. At the top is a navigation bar with icons for Contacts, Accounts, Oppty, Notes, Docs, Tasks, Projects, and Home. Below this is a blue header bar with a pencil icon, a close button, the word "Project", and search icons. The main content area is a form for project details:

- Project: Oppty 46 and Gagen Acct
- Start: 6/28/2018, End: 6/29/2018
- Owner: Dave Chennault, Hot:
- Status: Open
- Profile: (empty field)
- Description: This is a POC for Will Gagen. The purpose is to understand how the new Pinwheel design could work in their new lineup of products.

Below the form is a tabbed interface with "Tasks", "Notes", "Docs", and "Contacts" tabs. The "Contacts" tab is active, showing a list of contacts with icons for Create, Edit, Add, View, and Refresh. The list includes:

- Dr Seuss
- Eddie Van Halen
- Rebel Wilson
- Sheldon Brown

The contact "Eddie Van Halen" is selected and expanded to show details:

- Eddie Van Halen**
- Van Helen Industries
- Title: Guitar God
- Phone: 555-090-0090
- Cell: 333-090-3000
- EVanHalen@VHIndustries.Com
- Hard working professional player

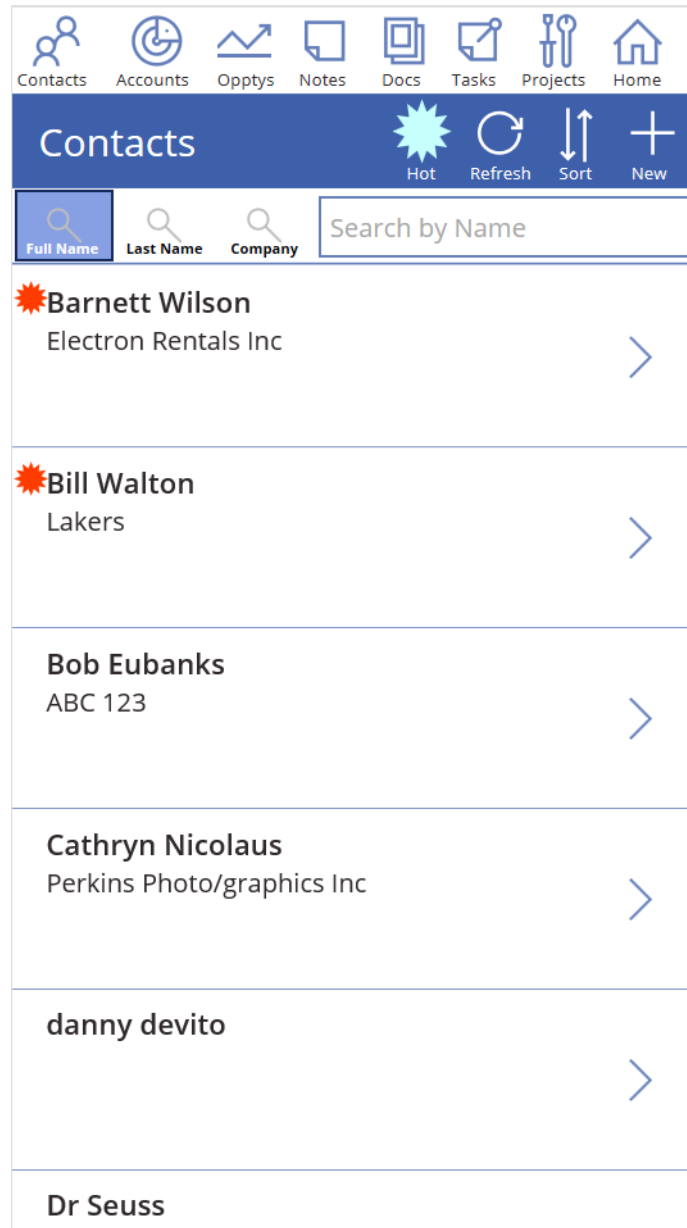
To the right of the contact details is a photo of Eddie Van Halen playing a guitar.

Contacts Module

The Contacts Module is the module where you can view all the Contact information used throughout the app. This is the central store and all Contact info where you can search and edit for Contacts stored within the app. You can add a contact here, or edit values as needed. If you add a contact within any of the other modules, that Contact will be listed in this module.

Controls

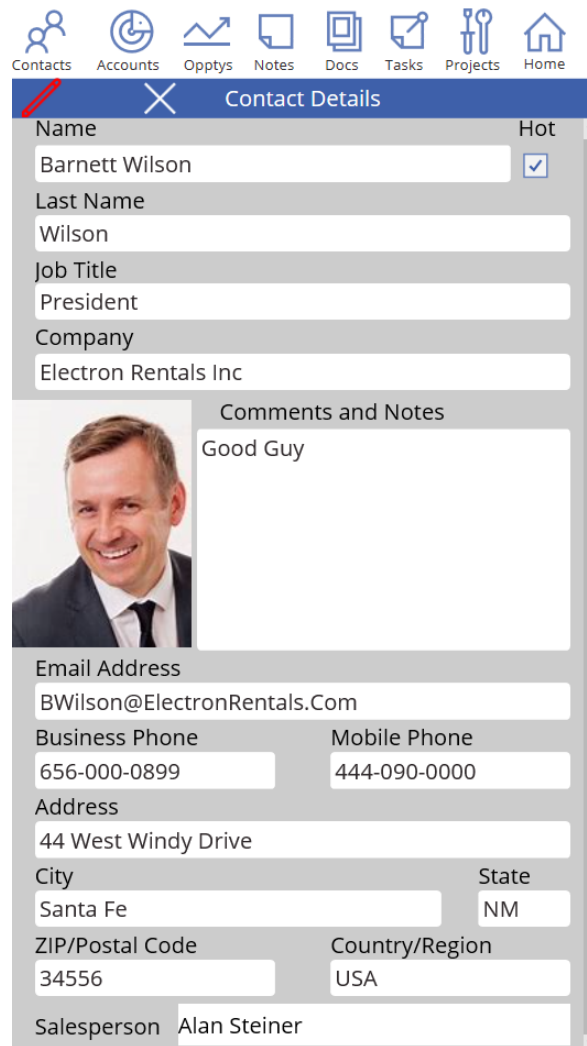
The controls on the Contact list are used to filter, search, sort and add Contacts. You can search by the full name, last name or company. You can filter using the “hot” button. You can use the hot button in combination with the Search to find only hot contacts that meet your search criteria. Finally, you can sort the items in the list in ascending or descending order.



You can navigate to the detailed Contact view by selecting anywhere on the Contact Record.

Contact Detail

You can see the full Contact Detail by selecting an item in the Contact list. The Contact detail record shows you all the information about that contact. You can edit and save the Contact info here or you can edit a subset of info with the Account, Opportunity, or Project Contact details.



Contacts Accounts Opptys Notes Docs Tasks Projects Home


Contact Details

Name Hot
Barnett Wilson

Last Name
Wilson

Job Title
President

Company
Electron Rentals Inc

 Comments and Notes
Good Guy

Email Address
BWilson@ElectronRentals.Com

Business Phone
656-000-0899

Mobile Phone
444-090-0000

Address
44 West Windy Drive

City
Santa Fe

State
NM

ZIP/Postal Code
34556

Country/Region
USA

Salesperson Alan Steiner

Controls

Red Pencil – Use the Red Pencil to put the form in Edit Mode.

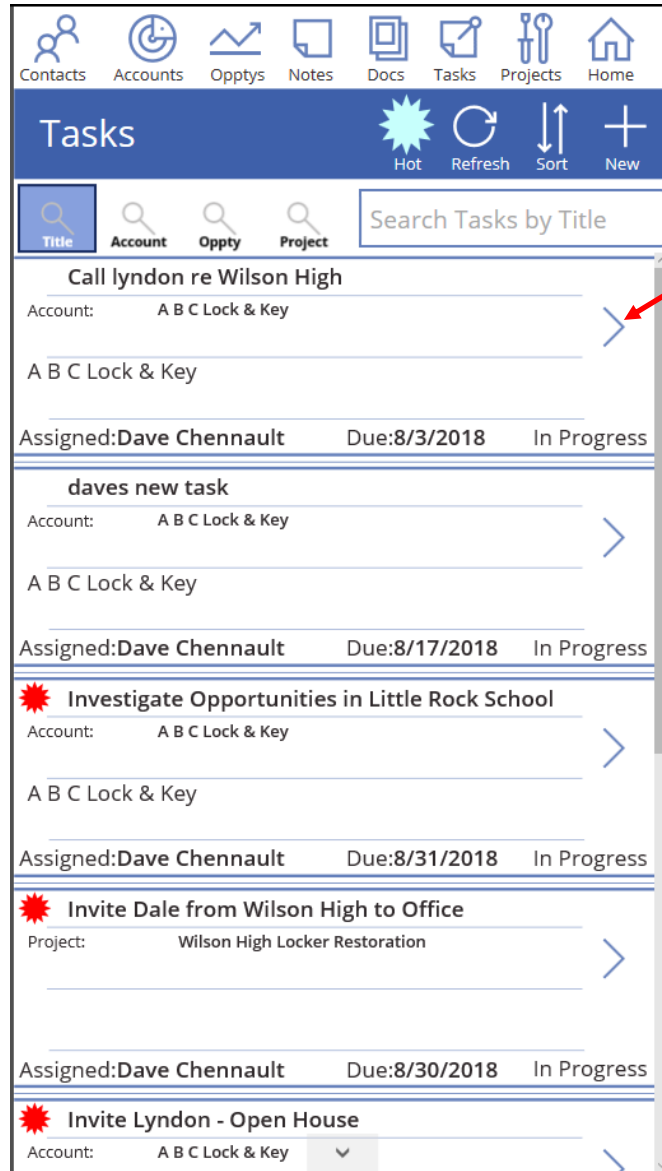
Disk – Use the Disk to save the record when adding or editing (The disk icon is not visible until you are in New or Edit mode in the form)

“X” – use the X to cancel the new form or edits and return to the Contact List.

Notes and Tasks Modules

The Notes and Tasks modules are related to an Account, Opportunity, or Project. They work in similar ways so we will cover them both in this section.

You can add, search, refresh, view, and filter by selecting the appropriate button as shown in the screenshot below. Select the arrow to open the detail behind the item.



Task and Notes Detail

The Task and Notes detail screens have similar functionality. Let's take a look at the Task detail screen.

The screenshot displays the 'Task Details' screen. At the top, there is a navigation bar with icons for Contacts, Accounts, Oppty's, Notes, Docs, Tasks, Projects, and Home. Below the navigation bar, the 'Task Details' screen is shown. It features a blue header with a red pencil icon, a close button (X), and the title 'Task Details'. The task information is as follows:

Task Title	Hot
Investigate Opportunities in Little Rock School	<input checked="" type="checkbox"/>
Due Date	Task Status
8/31/2018	In Progress
Assigned To	
Dave Chennault	
Account	
A B C Lock & Key	
Description	
8-1-18 Find out who is responsible within the Little Rock School District for Maintenance and Operations and determine if opportunities exist for additional work with ABC Lock and Key.	
Comments	

While the fields are easy to understand, a few buttons need additional information

- Red Pencil - You can edit the data in the Task or Note by selecting "Red Pencil" icon.
- X – you can close or cancel an edit by selecting the "X" button

When you edit the Task or Note, the fields can be edited and the edits or new record can be saved by hitting the white Disk icon

The screenshot shows a software interface with a navigation bar at the top containing icons for Contacts, Accounts, Opptys, Notes, Docs, Tasks, Projects, and Home. Below this is a blue header bar with a white disk icon, a close icon (X), and the text 'Task Details'. The main form area is titled '* Task Title' and includes a 'Hot' checkbox. The 'Task Title' field contains the text 'Investigate Opportunities in Little Rock School'. Below this are fields for 'Due Date' (8/31/2018), 'Task Status' (In Progress), 'Assigned To' (Dave Chennault), and 'Account' (A B C Lock & Key). The 'Description' field contains the text: '8-1-18 Find out who is responsible within the Little Rock School District for Maintanance and Operations and determine of opportunities exist for additional work with ABC Lock and KEy.' The 'Comments' field is currently empty.

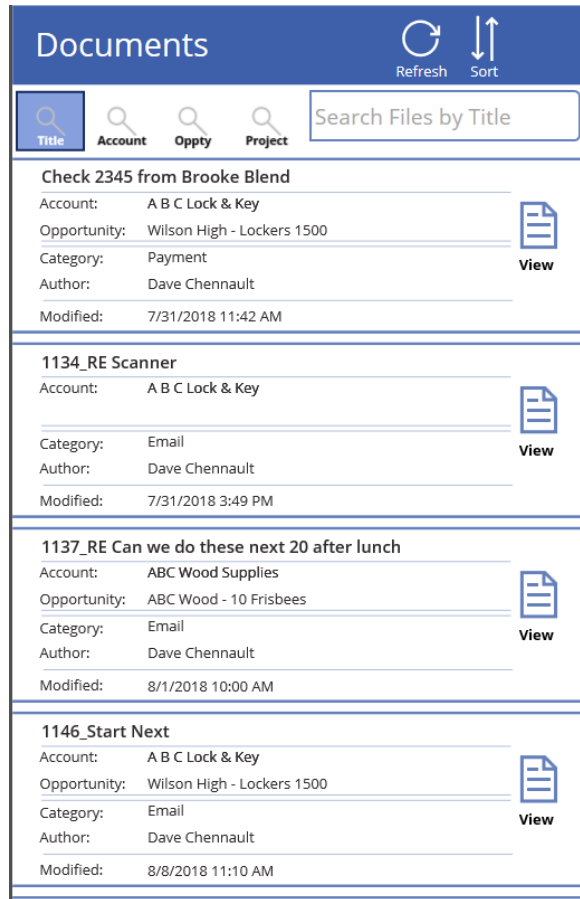
Docs Module

The Docs module lets you view documents that have been uploaded to SideKick 365 CRM Accounts, Opportunities, Projects, or Contacts. Let's take a look.

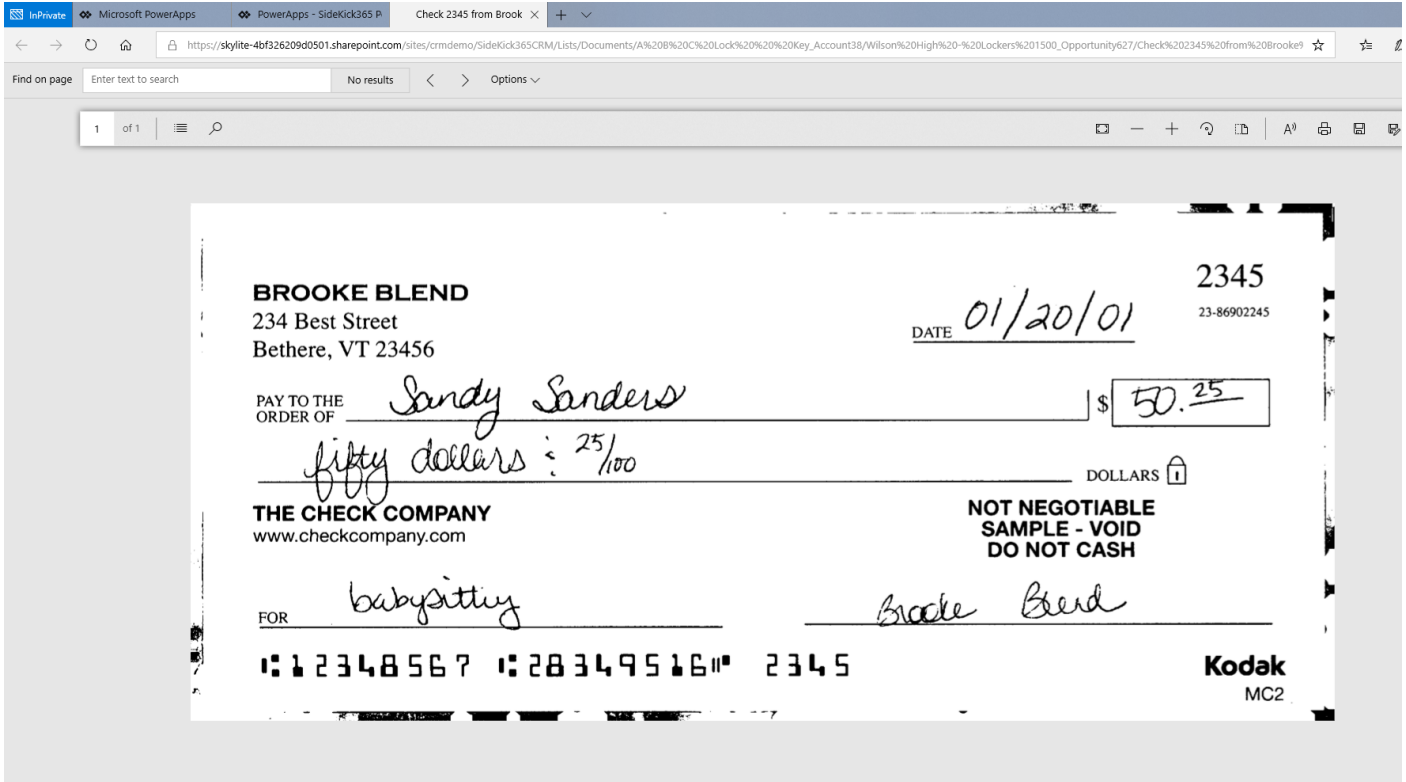
NOTE – You cant upload files into SideKick 365 CRM from with SideKick 365 CRM Mobile today. This capability will be added when file upload and management within PowerApps fully supports the capability we need.

The screen shown below shows a list of documents. It includes a few interesting capabilities including

- Search – The search will find documents with the Title that starts with the search term
- View – Selecting the View button will launch the document in the browser or app able to view the file (if possible)



Try selecting document called "Check 2345 from Brooke Blend". This will launch a scanned copy of a check saved as a .pdf file that is stored in a SharePoint document library in a separate browser window.



Section 4 - SideKick 365 CRM PowerBI Dashboard and Reports

SideKick 365 CRM also includes power dashboard and reporting capabilities using PowerBI. The Dashboard and reports in this demo are available as a free download from AppSource and you can easily install it to work with your data once you install SideKick 365 CRM into your environment. You can read and overview of how to find and install the dashboard and reports into your Office 365 Environment by reading the link here

<https://docs.microsoft.com/en-us/power-bi/template-content-pack-experience>

Drop us a line at Info@SkyLiteSystems.Com when you are ready to install these reports into your environment and we will send you a guide to help you set things up properly - it is easy to do.

Licensing Considerations

You have two options to consider with PowerBI licensing. These include

PowerBI Free – You can sign up for PowerBI as an individual and download the reports and template and set it up for your personal use. Every user will need to set up the template and any changes will need to be replicated for each user.

- When to use Free – If you are a small organization and don't need to change the dashboard and reports or just want to make some small changes, then free may be a good option

PowerBI Pro – Power BI Pro costs \$9.99 per user per month. The main advantage is the ability to install one time and share the dashboard and reports with all users in your organization

- When to Use Pro – Use PowerBI Pro when you want to minimize setup and maintenance costs and/or if you plan on modifying or adding to the Dashboard and Reports.

See the links here <https://docs.microsoft.com/en-us/power-bi/service-self-service-signup-for-power-bi> and here <https://powerbi.microsoft.com/en-us/pricing/> to review options.

SideKick 365 CRM Reports

SideKick 365 CRM Reports are powerful and useful. Here are some highlights to consider

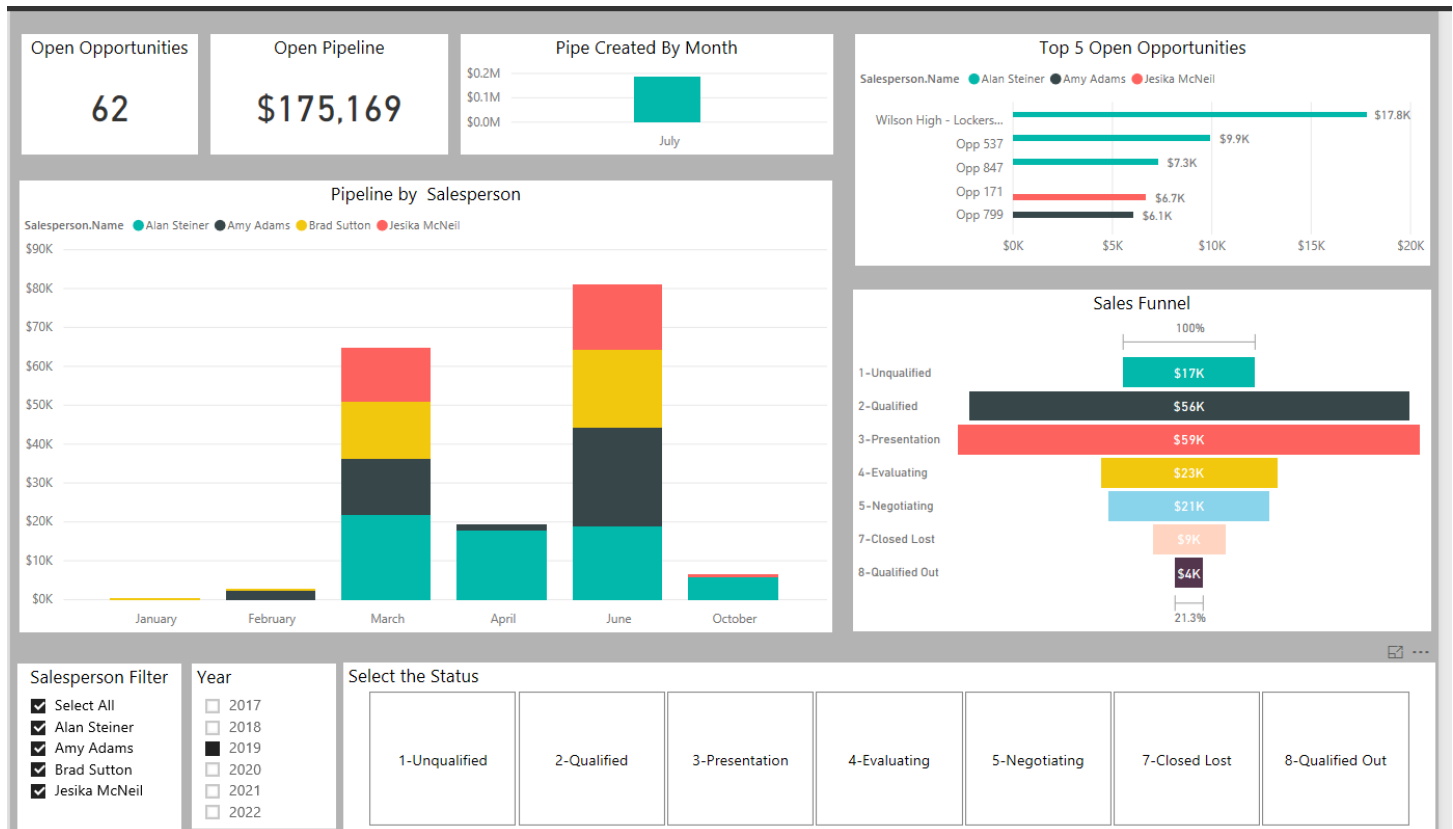
- All of these reports can be tailored and customized to meet your needs using the Free PowerBI Desktop Designer tool from Microsoft.
- The data is automatically updated from SideKick 365 CRM daily so you can walk in the office, grab a cup of coffee and get a great overview of how things are progressing or zero in on items that need your attention.
- SideKick 365 CRM has tremendous flexibility built into it. These reports are just a small example of what can be built. Email us at Info@SkyLiteSystems.Com if you need additional reports or capabilities.

Let's dig into the reports.

Pipeline Report

The pipeline report is built to give you a quick snapshot of the pipeline and also zero in on where the deals are within your pipeline. Highlights of this report include:

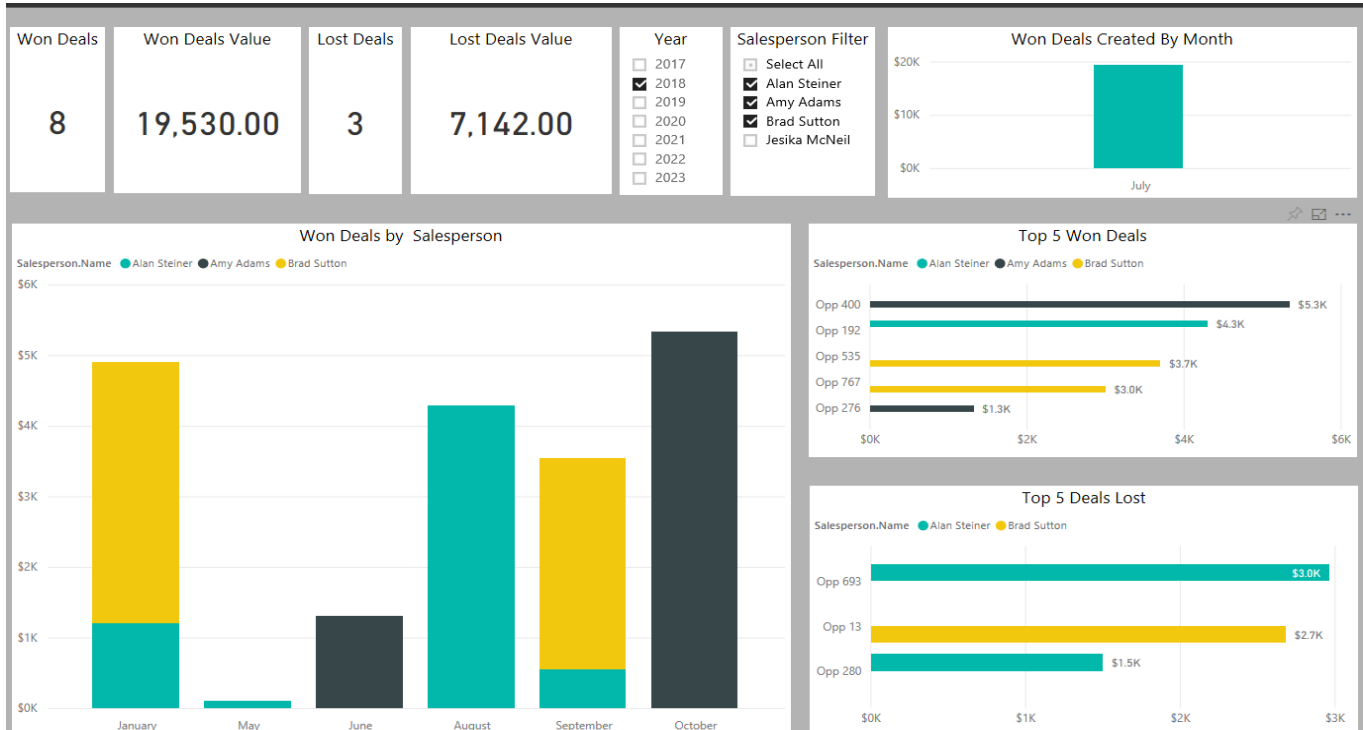
- Pipeline breakdown created by Month and Sales Rep
- Sales Funnel
- Ability to slice based upon Sales Rep, Projected Close (by year) , or Sales Stage
- Top 5 Open Opportunities
- Total pipeline count and value (not this could be weighted or raw value)



Closed Deals

The Closed Deals report shows you what deals have closed by who and when. Highlights of this report includes:

- Won breakdown created by Month and Sales Rep
- Total Won Deals – Count and Value
- Ability to slice based upon Sales Rep, Close Date (by year)
- Total Closed Deals – Count and Value
- Won Deals Created by Month (for aging)
- Top 5 Won Deals by Value (could be weighted or raw)
- Top 5 Deals Lost by Value (could be weighted or raw)

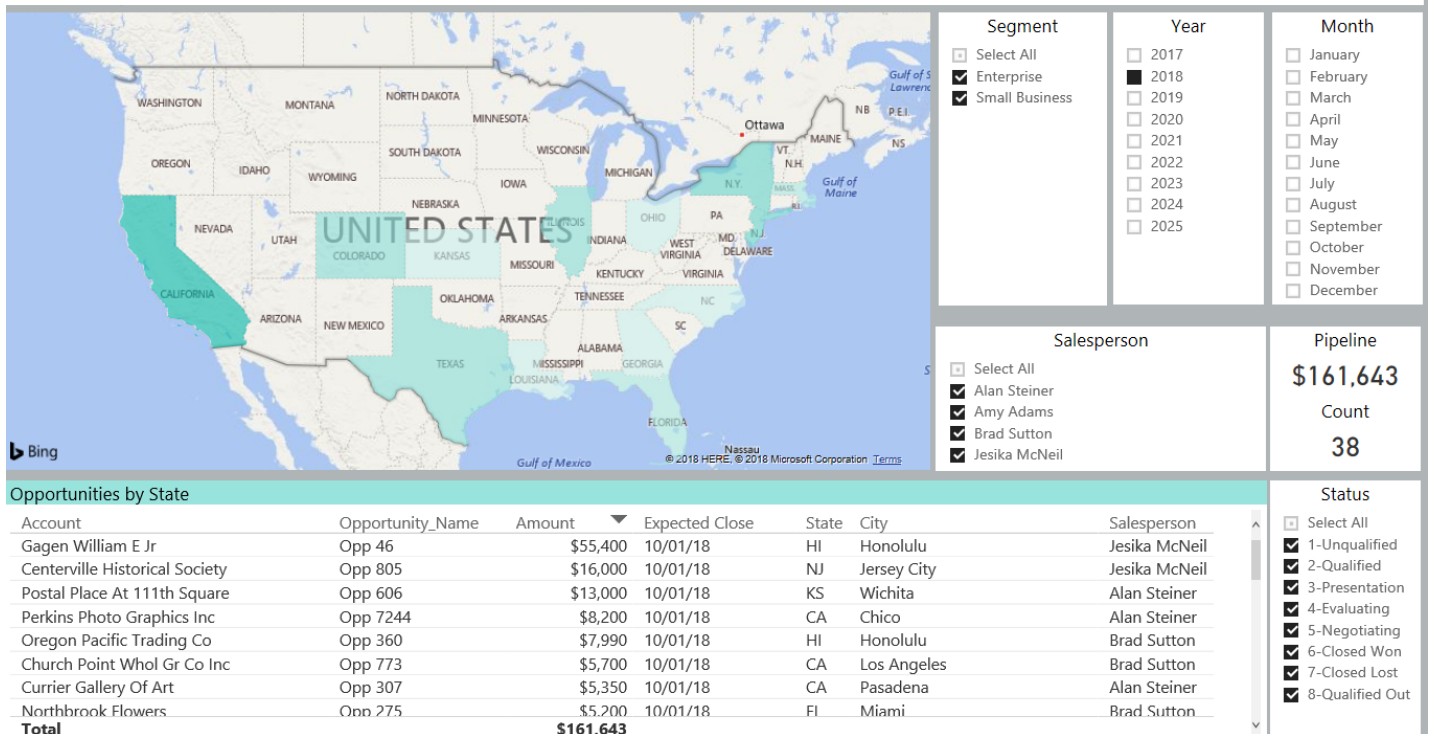


Deal Location by State

The Deal Location by State report lets you see where Opportunities are located. The location is based upon the address of the Account associated with the Opportunity. Highlights of this report includes:

- Slice by Month, Year, Territory, Sales Stage, and Sales Rep
- Total Pipeline – Count and Value (could be weighted or raw)
- Ability to click on a state and filter using the Map
- Detail of Opportunity in Grid below Map

Opportunity Pipeline - By State



Opportunity Pipeline By Product and State

This report show you where your sales are and what products are included in the deal. Highlights of this report includes:

- Slice by Month, Year, Territory, Sales Stage, and Sales Rep
- Total Pipeline –Value (could be weighted or raw) by Product and Sales Rep
- Ability to click on a state and filter using the Map
- Detail of Opportunity in Grid below Map
- Slicing by Product to find out what products are selling where

Opportunity Pipeline - By Product

Sales by State

Market Segment

 Select All
 Enterprise
 Small Business

Year

 Select All
 2017
 2018
 2019
 2020
 2021
 2022
 2023
 2024
 2025

Month

 January
 February
 March
 April
 May
 June
 July
 August
 September
 October
 November
 December

Title	AccountName	State	Opportunity_Link	Quantity	TotalPrice
Padlock 40 MM	Ames Plumbing and Heating	AK	Opp 171	2000	5,300.00
Padlock - 3 Inch	A B C Lock & Key	CA	Wilson High - Lockers 1500	1400	11,186.00
Padlock 40 MM	Lawson John F Esq	IN	Opp 829	800	2,120.00
General Labor	Lawson John F Esq	IN	Opp 829	250	5,500.00
General Labor	A B C Lock & Key	CA	Wilson High - Lockers 1500	200	4,400.00
Yale - Key 3 Inch	Howard Johnson	CA	Opp 592	125	748.75
MasterLock - 3 Inch w Key	A B C Lock & Key	CA	Wilson High - Lockers 1500	100	799.00
Padlock - 3 Inch	Buckeye Reserve Title	TX	Opp 178	100	799.00
MasterLock - 3 Inch w Key	Medlin Charles K Jr	WY	Opp 469	79	631.21
Yale - Key 3 Inch	Burkeve Reserve Title	TX	Opp 178	70	419.30
Total				5394	38,807.60

Product Sales

SalePerson: Alan Steiner (Green), Amy Adams (Black), Brad Sutton (Red), Jesika McNeil (Yellow)

Select Salesperson

 Select All
 Alan Steiner
 Amy Adams
 Brad Sutton
 Jesika McNeil

Select Products

 Select All
 General Labor
 Master Electronic Padlock
 MasterLock - 3 Inch w Key
 Masterlock Magnum
 Padlock - 3 Inch
 Padlock 40 MM
 Project Management
 Standard Eribee

Copyright 2018

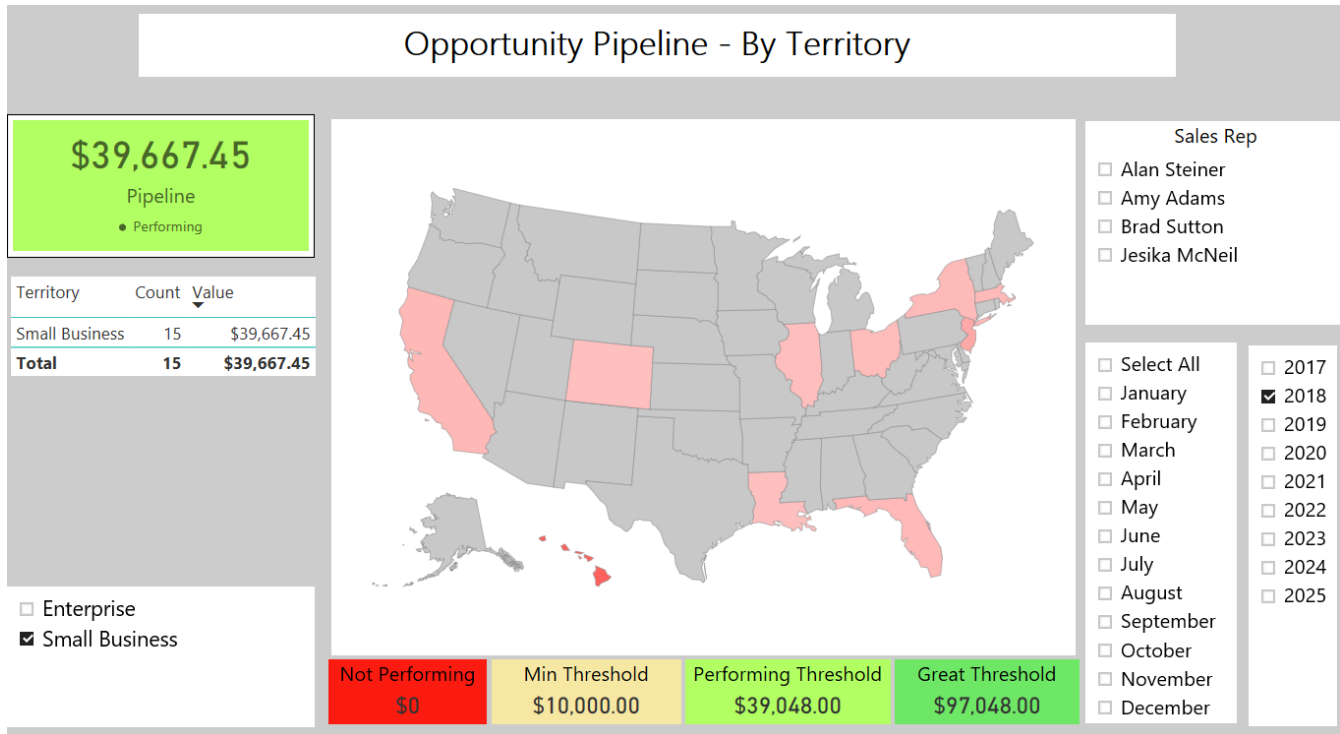
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SkyLite Systems

Sales Performance By Territory

This report shows how the pipeline compares with the sales targets for that territory. Highlights of this report includes:

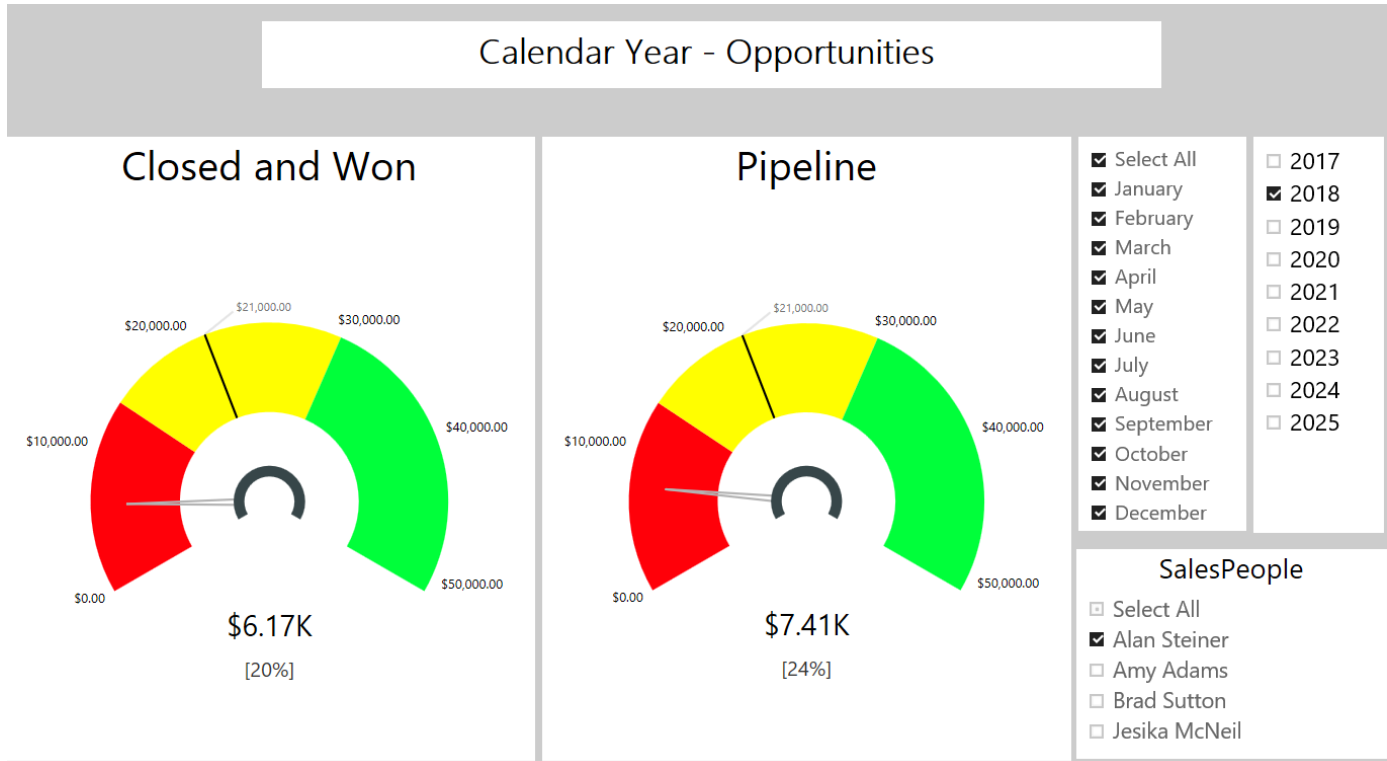
- Slice by Month, Year, Territory, and Sales Rep
- Total Pipeline – Value (could be weighted or raw) by Product and Sales Rep
- Ability to click on a state and filter using the Map
- Ability to Filter By Territory
- Pipeline versus Target health Check – Count and Value



SalesMeter - Calendar Year

This report shows Pipeline and Closed deals versus targets. It includes a gauge to let you track how one or many sales reps are performing versus targets during the calendar year. Highlights of this report includes:

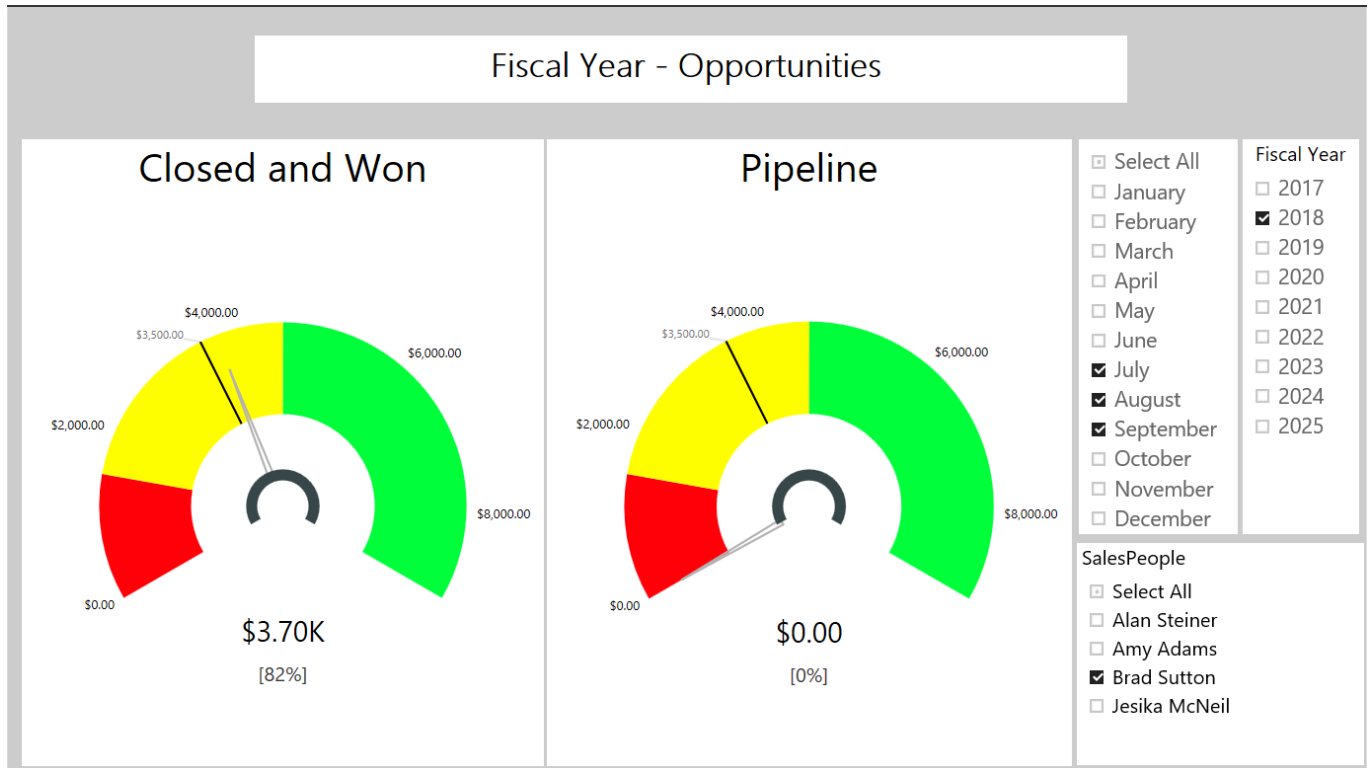
- Slice by Month, Year, and Sales Rep
- Total Pipeline – Value (could be weighted or raw) by Sales Rep(s)
- Total Closed Deals – Value (could be weighted or raw) by Sales Rep(s) Ability to Filter By Territory
- Actual versus Target gauge health Check –Value



SalesMeter - Fiscal Year

This report shows Pipeline and Closed deals versus targets. It includes a gauge to let you track how one or many sales reps are performing versus targets during the fiscal year. Highlights of this report includes:

- Slice by Month, Year, and Sales Rep
- Total Pipeline – Value (could be weighted or raw) by Sales Rep(s)
- Total Closed Deals – Value (could be weighted or raw) by Sales Rep(s) Ability to Filter By Territory
- Actual versus Target gauge health Check –Value



Next Steps

Now it is up to you. Explore SideKick 365 CRM by clicking around and try adding using some of your data to see how it can start working for you. We have many different videos posted on our website that explain SideKick 365 CRM in more detail at <https://SkyLitesystems.com/sidekick-365-crm-videos>. Please watch some of these to learn more about SideKick 365 CRM.

Finally, we also have other great Apps for managing Case files and we have a Forms and Workflow package called SideKick 365 Forms you can explore by clicking through our website at www.SkyLitesystems.com.

Feel free to contact us with questions or comments at info@SkyLitesystems.com.



Appendix

The next section will show you how to extend the power of SideKick 365 CRM. Let's start by looking at how you can use standard Office products like Word, Excel and OneNote as simple, powerful forms within Sidekick 365 CRM.

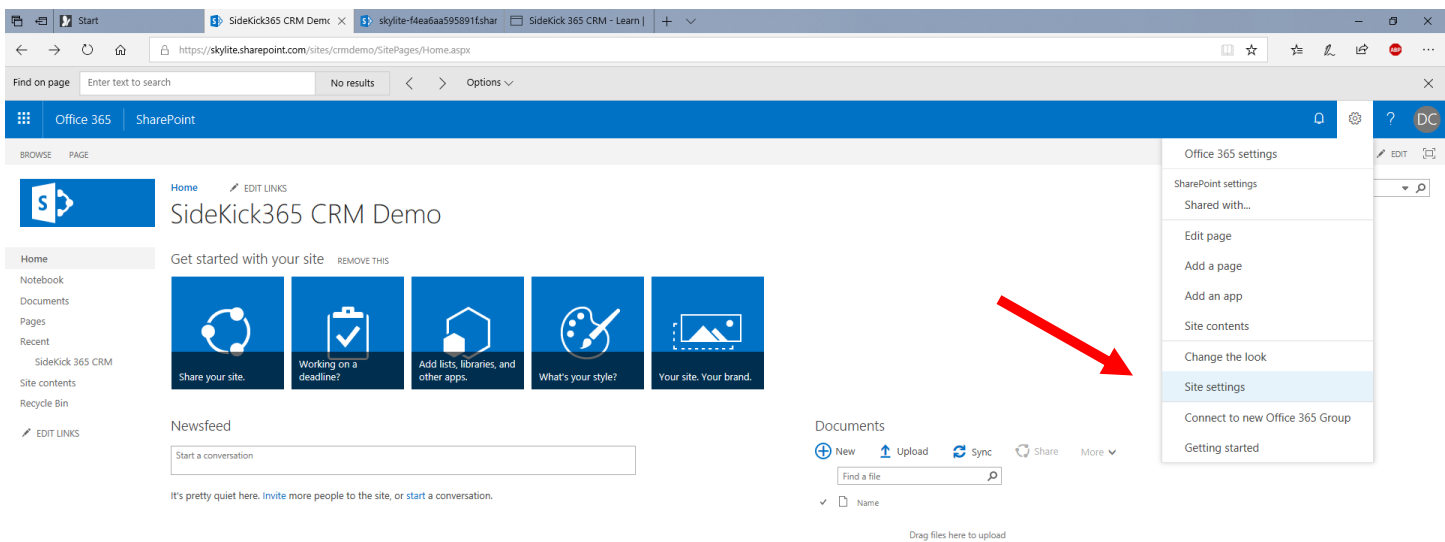
Setting up Templates Using Content Types

Content Types are a part of SharePoint that will let you set up templates like Excel spreadsheets or forms in Word or OneNote. This section will explain how you can create templates that can be used in any document library within SideKick 365 CRM. (NOTE – YOU CANT DO THIS LOGGED IN AS [THE TEST USER](#) – WE JUST WANT TO SHOW YOU THE STEPS)

Creating a Template from an Excel Spreadsheet

Let's start by creating a template from an Excel Spreadsheet and adding it to SideKick 365 CRM.

- Go into the hostweb (the site that holds SideKick 365 CRM) and go to the site settings by selecting Create Site Actions -> Site Settings



Then select -> Site Content Types under Galleries.

Home EDIT LINKS

Site Settings

- Home
- Notebook
- Documents
- Pages
- Recent
 - SideKick 365 CRM
- Site contents
- Recycle Bin
- EDIT LINKS

- Users and Permissions
 - People and groups
 - Site permissions
 - Site collection administrators
 - Site app permissions
- Web Designer Galleries
 - Site columns
 - Site content types
 - Web parts
 - List templates
 - Master pages
 - Themes
 - Solutions
 - Composed looks
- Site Administration
 - Regional settings
 - Language settings
 - Site libraries and lists
 - User alerts
 - RSS
 - Sites and workspaces
 - Workflow settings
 - Site Closure and Deletion
 - Popularity Trends
 - Term store management
- Search
 - Result Sources
 - Result Types
 - Query Rules
 - Schema
 - Search Settings
 - Search and offline availability
 - Configuration Import
 - Configuration Export
- Look and Feel
 - Title, description, and logo
 - Quick launch
 - Top link bar
 - Navigation Elements
 - Change the look
- Site Actions
 - Manage site features
 - Save site as template
 - Enable search configuration export
 - Reset to site definition
 - Delete this site
- Site Collection Administration
 - Recycle bin
 - Search Result Sources
 - Search Result Types
 - Search Query Rules
 - Search Schema
 - Search Settings
 - Search Configuration Import
 - Search Configuration Export
 - Site collection features
 - Site hierarchy
 - Site collection audit settings
 - Audit log reports
 - Portal site connection
 - Content Type Policy Templates
 - Site collection app permissions
 - Storage Metrics
 - Site Policies
 - Content type publishing
 - Popularity and Search Reports
 - SharePoint Designer Settings
 - HTML Field Security
 - Site collection health checks
 - Site collection upgrade

- Use the Parent Content Type **Document** from **Document Content Types** Group.
- Name the content Type something like "Excel Inspection".

Home EDIT LINKS

Site Content Types

New Site Content Type

Name and Description

Type a name and description for this content type. The description will be shown on the new button.

Name:

Description:

Parent Content Type:

Select parent content type from:

Parent Content Type:

Description: Create a new document.

Put this site content type into:

Existing group:

New group:

- Once you hit OK in the screen above, go to the Advanced Settings of the newly created content type, add a new Excel file.

The screenshot shows the 'Site Content Type Information' section for 'Excel Inspection'. A red arrow points to the 'Advanced settings' link in the 'Settings' section. Below this, there is a table of columns:

Name	Type
Name	File
Title	Single line of text

Below the table are links for 'Add from existing site columns', 'Add from new site column', and 'Column order'.

The screenshot shows the 'Advanced Settings' page. A red arrow points to the 'Upload a new document template' radio button. Below it, a file path is entered in the text box: 'C:\Users\DaveC\Documents\SideKick365 xRM Ultimat', with a 'Browse...' button to its right. Other settings include 'Read Only' (set to No) and 'Update all content types inheriting from this type?' (set to Yes).

Good job! Now you have the template loaded as a Content Type in the Host web, now we need to add it to the document library in SideKick 365 CRM. Let's get started...

- Open SideKick 365 CRM
- Select the Documents Module by picking Documents in the lefthand menu
- Now select any folder in the document list by selecting the checkmark column **with a single click to activate the library tab** and then select "Modify View"

SideKick365 CRM Demo

BROWSE FILES LIBRARY

View Quick Edit Create View Modify View Current View: Default

Tags & Notes E-mail a Link Alert Me RSS Feed Sync Connect to Office Export to Excel Open with Explorer Shared With Workflow Settings

Create New

Leads Accounts Opportunities Spread Projects Contacts Tasks Notes Documents Categories Products Campaigns Campaign Groups Profiles Sales People Sales Goals Sales Stages

Documents

Current View Find a file

Name	Modified	Modified By	Category
A B C Lock Key_Account38	July 30	Sergiy Nesterenko	
A Limousine Service_Account301	July 30	Sergiy Nesterenko	
AAAA1111_Account512	Monday at 11:14 AM	Sergiy Nesterenko	
Aaron William Esq_Account112	July 30	Sergiy Nesterenko	
ABC Wood Supplies_Account502	August 1	Dave Chennault	
Accurate Color Inc_Account257	July 30	Sergiy Nesterenko	
Ace Pro Pest Cntrl Inc_Account378	July 30	Sergiy Nesterenko	
Acker Knitting Mills Inc_Account68	July 30	Sergiy Nesterenko	
Acra Aerospace Inc_Account475	July 30	Sergiy Nesterenko	
Action Nursing Care Llc_Account444	July 30	Sergiy Nesterenko	
Action Remediation Co_Account250	July 30	Sergiy Nesterenko	
Advanced Electromagnetics Inc_Account144	July 30	Sergiy Nesterenko	
Air Academy Federal Credit Un_Account58	July 30	Sergiy Nesterenko	
Airlifter_Account402	July 30	Sergiy Nesterenko	
Albers Technologies Corp_Account15	July 30	Sergiy Nesterenko	
Alexander Christine T Esq_Account496	July 30	Sergiy Nesterenko	
All N All Shop_Account499	July 30	Sergiy Nesterenko	
Allegro Copy and Print_Account330	July 30	Sergiy Nesterenko	
Allen Industrial Supply_Account100	July 30	Sergiy Nesterenko	

- Now select the word Settings to get into the Document Library Settings

SideKick365 CRM Demo

Outlook OneDrive SharePoint Teams Yammer Dynamics 365 Flow Admin Partner

SideKick 365 CRM

Settings Edit View

Columns

Select or clear the check box next to each column you want to show or hide in this view of this page. To specify the order of the columns, select a number in the Position from left box.

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Type (icon linked to document)	1
<input checked="" type="checkbox"/>	Name (linked to document with edit menu)	2
<input checked="" type="checkbox"/>	Modified	3
<input checked="" type="checkbox"/>	Modified By	4
<input checked="" type="checkbox"/>	Category	5
<input type="checkbox"/>	Account	6
<input type="checkbox"/>	Accountid	7
<input type="checkbox"/>	AccountName	8
<input type="checkbox"/>	App Created By	9
<input type="checkbox"/>	App Modified By	10
<input type="checkbox"/>	Check In Comment	11
<input type="checkbox"/>	Checked Out To	12
<input type="checkbox"/>	Comment count	13
<input type="checkbox"/>	Compliance Asset Id	14
<input type="checkbox"/>	Contact	15
<input type="checkbox"/>	Contactid	16
<input type="checkbox"/>	ContactName	17
<input type="checkbox"/>	Content Type	18

- Next, select Advanced Settings.

SideKick 365 CRM
Documents > Settings

List Information
Name: Documents
Web Address: https://skylite-4bf326209d0501.sharepoint.com/sites/crmdemo/SideKick365CRM/Lists/Documents/Forms/AllDocuments.aspx
Description: Documents

General Settings
 ▫ [List name, description and navigation](#)
 ▫ [Versioning settings](#)
 ▫ [Advanced settings](#)
 ▫ [Validation settings](#)
 ▫ [Column default value settings](#)
 ▫ [Audience targeting settings](#)
 ▫ [Rating settings](#)
 ▫ [Form settings](#)

Permissions and Management
 ▫ [Delete this document library](#)
 ▫ [Save document library as template](#)
 ▫ [Permissions for this document library](#)
 ▫ [Manage files which have no checked in version](#)
 ▫ [Information Rights Management](#)
 ▫ [Generate file plan report](#)
 ▫ [Enterprise Metadata and Keywords Settings](#)
 ▫ [Information management policy settings](#)

Communications
 ▫ [RSS settings](#)

Content Types
 This document library is configured to allow multiple content types. Use content types to specify the information you want to display about an item, in addition to its policies, workflows, or other behavior. The following content types are currently available in this library:

Content Type	Visible on New Button	Default Content Type
Upload File	✓	✓

▫ [Add from existing site content types](#)
 ▫ [Change new button order and default content type](#)

Columns
 A column stores information about each document in the document library. Because this document library allows multiple content types, some column settings, such as whether information is required or optional for a column, are now specified by the content type of the document.

Column (click to edit)	Type	Used in
------------------------	------	---------

- Here, set **Allow Management of Content Types** to **Yes** and click OK. This takes you back to the Document Library Settings page

SideKick 365 CRM
Settings > Advanced Settings

Content Types
 Specify whether to allow the management of content types on this document library. Each content type will appear on the new button and can have a unique set of columns, workflows and other behaviors.

Allow management of content types?
 Yes No

Document Template
 Type the address of a template to use as the basis for all new files created in this document library. When multiple content types are enabled, this setting is managed on a per content type basis. [Learn how to set up a template for a library.](#)

Template URL:

Opening Documents in the Browser
 Specify whether browser-enabled documents should be opened in the client or browser by default when a user clicks on them. If the client application is unavailable, the document will always be opened in the browser.

Default open behavior for browser-enabled documents:
 Open in the client application
 Open in the browser
 Use the server default (Open in the browser)

Custom Send To Destination
 Type the name and URL for a custom Send To destination that you want to appear as an option for this list. It is recommended that you choose a short name for the destination.

Destination name: (For example, Team Library)

 URL:

Folders
 Specify whether the "New Folder" command is available. Changing this setting does not affect existing folders.

Make "New Folder" command available?
 Yes No

- Now scroll down to the Content Types section and select “Add From Existing Site Content Types”

SideKick 365 CRM

Documents › Settings

List Information

Name: Documents
Web Address: https://skylite-4bf326209d0501.sharepoint.com/sites/crmdemo/SideKick365CRM/Lists/Documents/Forms/AllDocuments.aspx
Description: Documents

General Settings

- List name, description and navigation
- Versioning settings
- Advanced settings
- Validation settings
- Column default value settings
- Audience targeting settings
- Rating settings
- Form settings

Permissions and Management

- Delete this document library
- Save document library as template
- Permissions for this document library
- Manage files which have no checked in version
- Information Rights Management
- Generate file plan report
- Enterprise Metadata and Keywords Settings
- Information management policy settings

Content Types

This document library is configured to allow multiple content types. Use content types to specify the information you want to display about an item, in addition to its policies, workflows, or other behavior. The following content types

Content Type	Visible on New Button	Default
Upload File	✓	✓

- Add from existing site content types
- Change new button order and default content type

Columns

A column stores information about each document in the document library. Because this document library allows multiple content types, some column settings, such as whether information is required or optional for a column, are not

Column (click to edit)	Type	Used in

- Next, Add the Newly created Content Type “Inspection” to the Library and hit “OK”.

SideKick 365 CRM

Settings › Add Content Types ⓘ

Select Content Types

Select from the list of available site content types to add them to this list.

Select site content types from: All Groups

Available Site Content Types:

- Allow any content type *
- Audio
- Basic Page
- Document
- Document Set
- Dublin Core Columns
- Excel Inspection
- Form
- Image

Content types to add:

Add >

< Remove

Description:
 Allows users to upload documents of any content type to a library. Unknown documents will be treated as their original content type in client applications.

Group: Special Content Types

Now when you go into any document tab within SideKick 365 CRM and select the New button, you should be able to see the new template Excel Inspection in the New Document dropdown.



Create New

- Leads
- Accounts
- Opportunities
- Spread
- Projects
- Contacts
- Tasks
- Notes
- Documents
- Categories
- Products
- Companions

Search this site

Account ID: 23090
Account Type: Customer

Documents | Contacts | Projects

Account Name
Salesperson

+ New

Current View

Create a new file

- Upload File
- Excel Inspection
- New folder

Name	Modified	Modified By	Category
10 Hours Consulting_Opportunity632	August 11	Alan Steiner	
ABC Lock and Key - Wilson High - 25 3 Inch locks_Opportunity654	Monday at 1:14 PM	Dave Chennault	
DOD Program	Monday at 2:50 PM	Alan Steiner	
Wilson High - Lockers 1500_Opportunity627	July 31	Dave Chennault	
1134_RE Scanner	July 31	Dave Chennault	Email
1150_Link to Mark Twain record	August 15	Alan Steiner	Email


Selecting the template creates the new Excel form from the template. Just hit save and it automatically saves into this document list associated with the Account, Opportunity, Project, or Contact – NICE!

Excel Online | SideKick 365 CRM | A B C Lock Key_Account38 | Book

FILE HOME INSERT DATA REVIEW VIEW Tell me what you want to do EDIT IN EXCEL

Undo Paste Copy Format Painter Clipboard Font Alignment Number Tables Insert

A B C D E F G H I J K L M N O P Q R

1 Home Inspection Checklist 
By Vertex42.com Vertex42 LLC 2014 ©

2
3
4 :Address _____ Date: _____
5
6
7 Note: This checklist is for personal use only. It should not be used in place of an official home inspection. This list may not be comprehensive. Contact a qualified ASHI certified home inspector for an official inspection.
8
9 M - missing, S - scratched, D - damaged, B - broken, R - repair/replace, W - Water Damage, L - Leaking
10
11 Exterior Good OK Bad Roof Good OK Bad
12 Back Doors
13 Deck, porch, patio
14 Doorbell
15 Driveway
16 Front Doors
17 Garage Doors
18 Garbage receptacle
19 House number
20 Mailbox
21 Outdoor lights
22 Paint and trim
23 Parking
24 Recycling receptacle
25 Sidewalks
26 Siding (brick/stone/cement)
27 Traffic noise
28 Windows
29 Are things loose, cracked, damaged, rotted, bug infested?
30 Notes:

Chimney
Gutters and downspouts
Soffits and fascia
When was it last replaced? Are there encroaching trees?
Notes:

Garage Good OK Bad
Ceiling
Doors
Floors
Lights
Storage
Walls
Windows
Is the garage door opener operating properly?
Notes:

← Beyond checking Good, OK or Bad, use these letters to be more specific about what you found.

← Highlighted in gray, each section also includes additional things to be on the lookout for.

← Each section also has a place for notes. It's highly recommended that if you check "OK" or "Bad" for any item

Adding More Templates

If you want to add more templates, like the Excel Spreadsheet entitled “Home Inspection” shown above, then follow the same steps. Add the file you want to use as a template in the host web (the site that holds SideKick 365 CRM) then add the new template (Content Type) to the Document Library in SideKick 365 CRM.

Digging Deeper

If you want to learn more about Content Types, then visit the url below for additional information.

<http://www.sharepoint.inf4web.com/1313/sharepoint-2013-how-to-add-additional-document-types-to-a-document-library/>

Tricks and Considerations

One Note Considerations

The trick to make OneNote a template using this technique is to export the OneNote Template as a OneNote Package so it can be uploaded to the new content type definition

OneNote Pathnames are limited to approximately 150 characters. You will see that the full path within SideKick 365 CRM can get quite long, so keep your account, project and opportunity names short if you want to use OneNote templates.

