SideKick 365 CRM

Tour Guide

Version 1.0.0

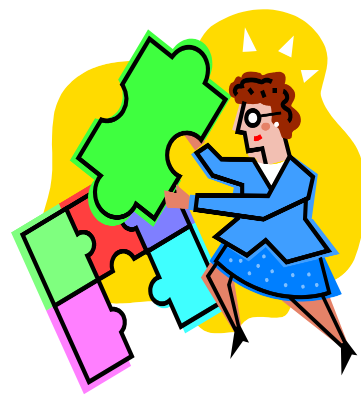
8/23/2018

Created and Built in California by SkyLite Systems

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 ….

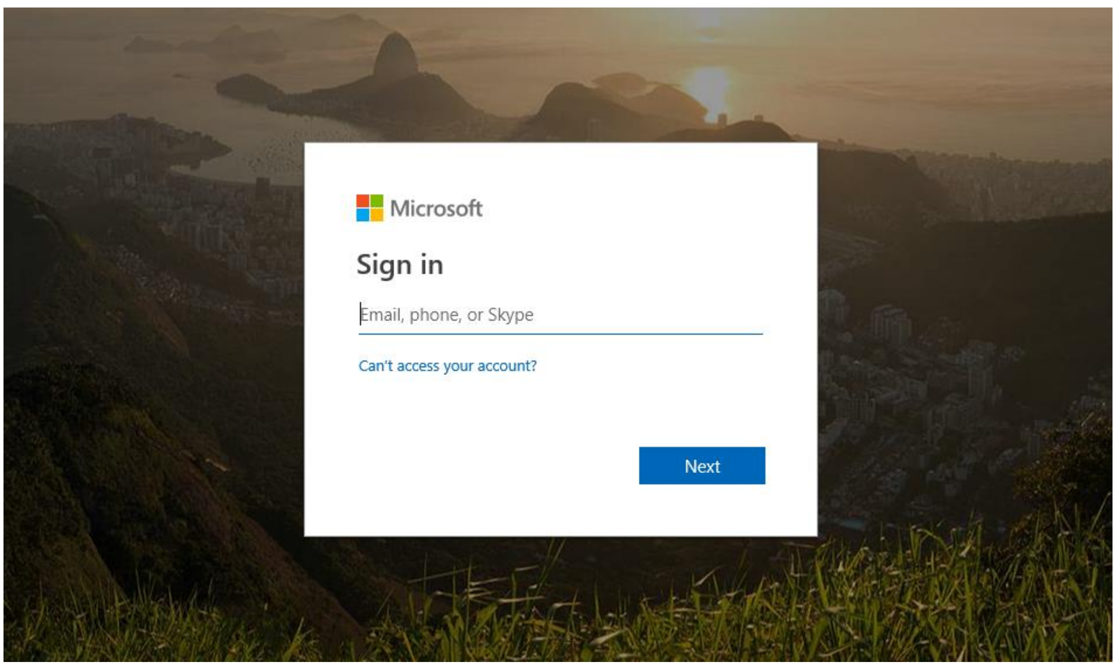
NOTE – Please send us an Email to Info@skyLiteSystems.Com and we will send you the proper web address (url), user name, and password to log in to this demo

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**

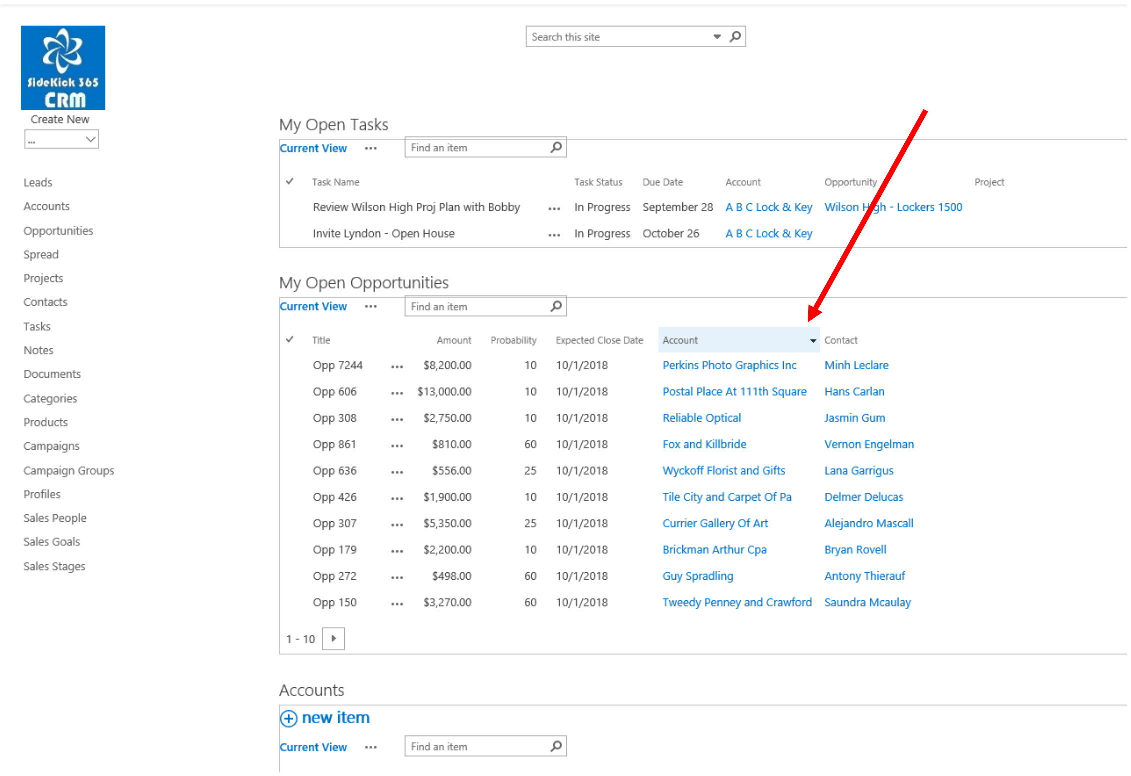


Home Page

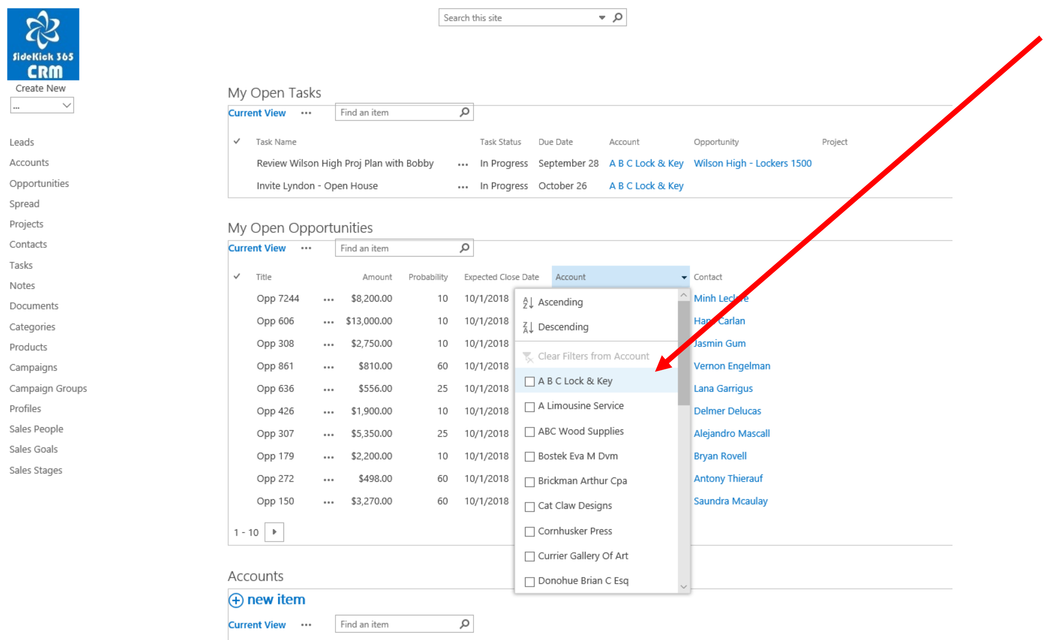
After typing the user name and password, you will be taken to the home page of the SharePoint SideKick 365 CRM demo site. The home page includes a list of open Tasks, Opportunities, Accounts, and Projects associated with a salesperson named Alan Steiner - the test user you logged in as. You see items “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…



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…



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.

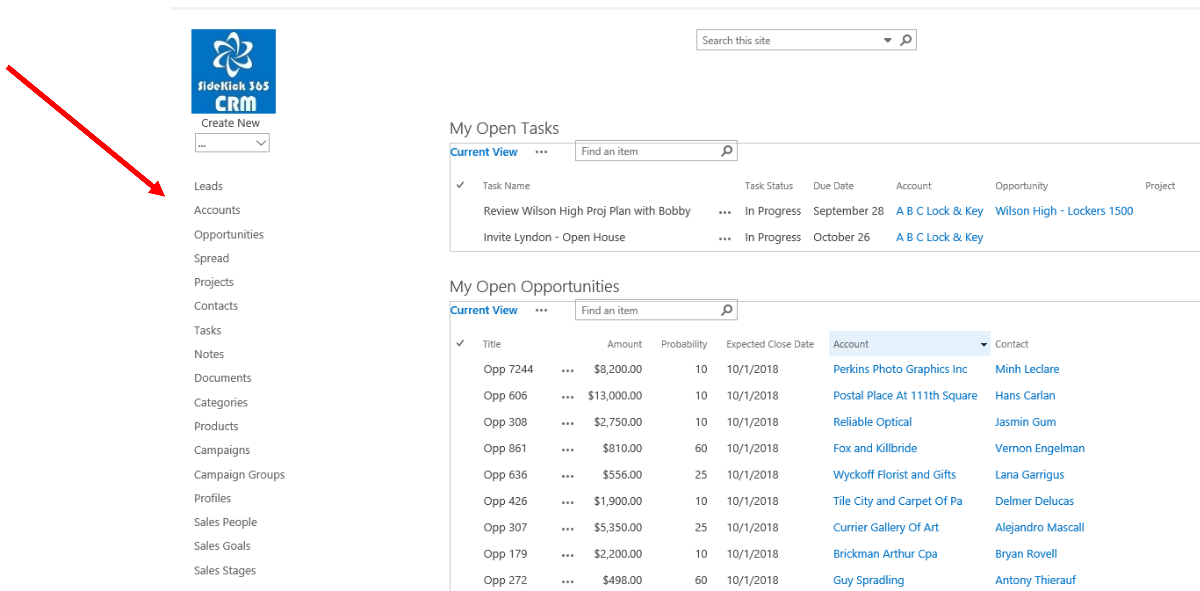
TIP – The headers in all lists in SideKick 365 CRM are very powerful. You can use them to sort and filter lists throughout SideKick 365 CRM.

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



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.

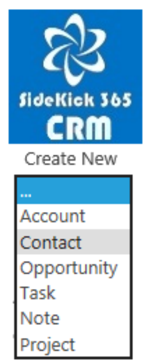
1 - Select the down arrow in “Create New” drop down.

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.



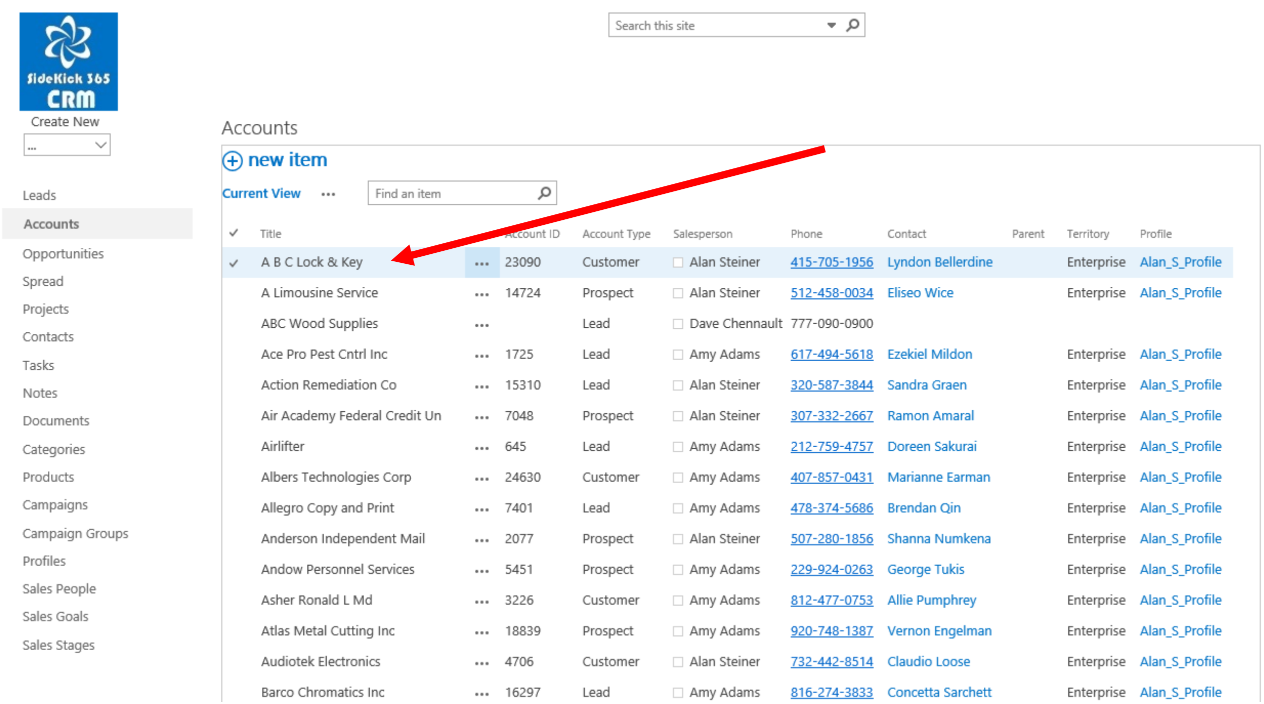
Walking Through the Modules

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.

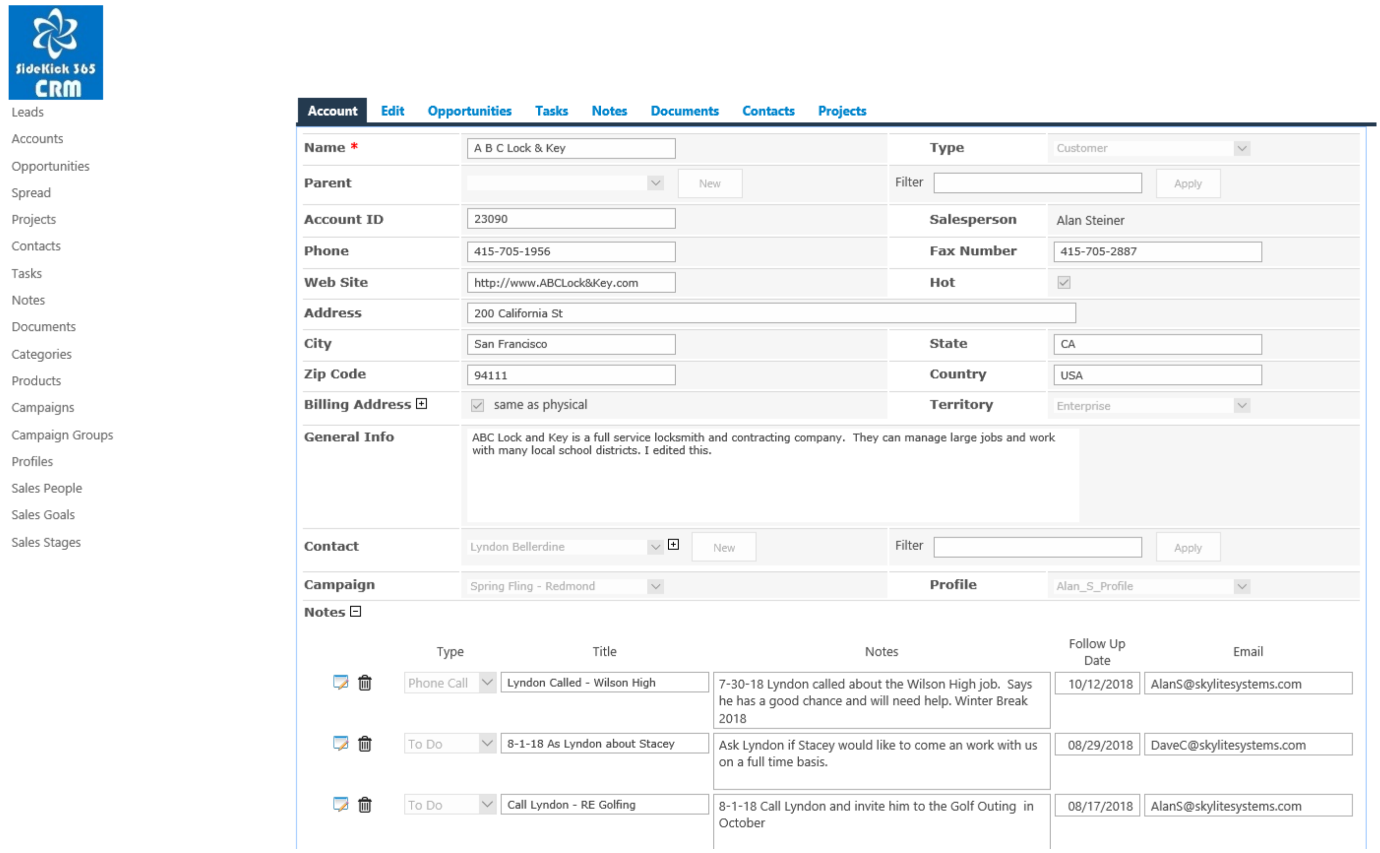
2 - Click on the Title of the Account – "ABC Lock & Key" as shown below.



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 accidently 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.

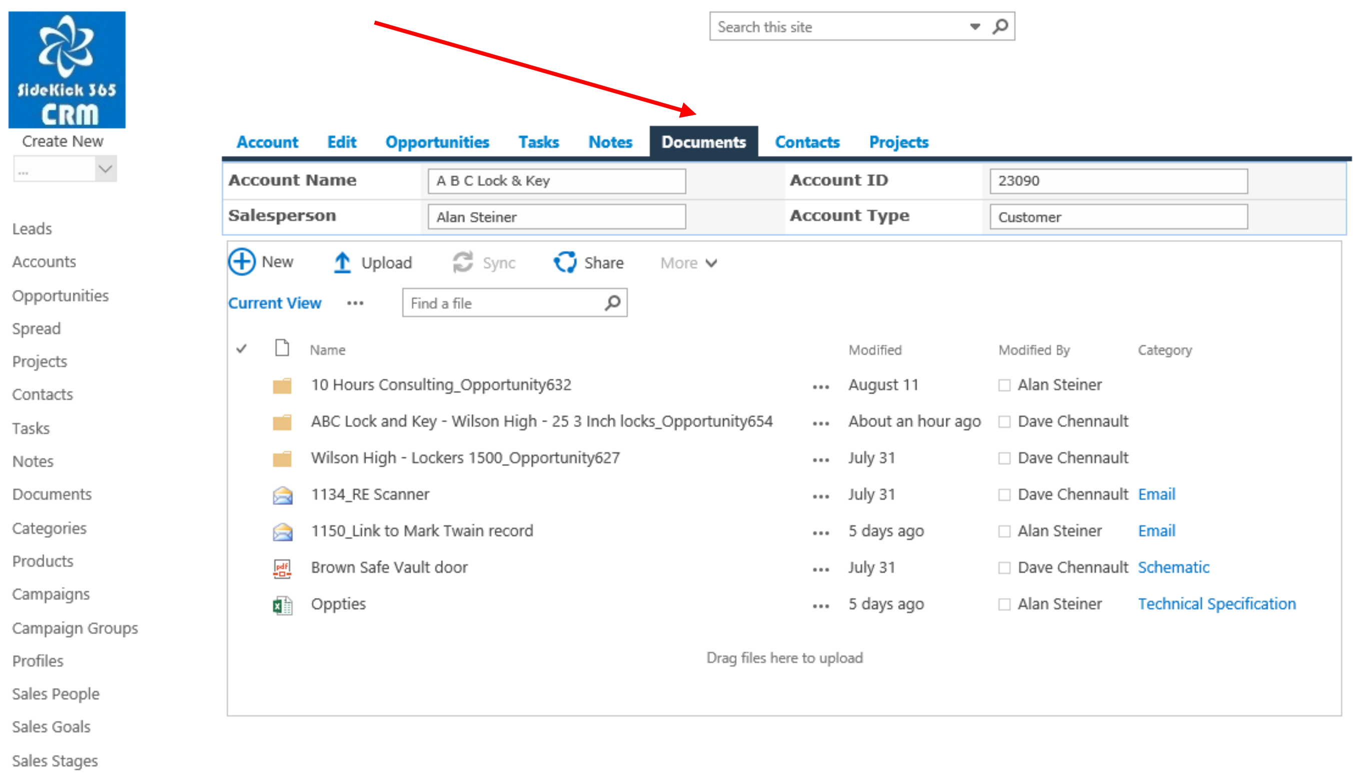


Tip – You can navigate to items related to an item in any of the modules by selecting any of the quick links listed in ***blue*** *at the top of the detail screen for that item.*

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.



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

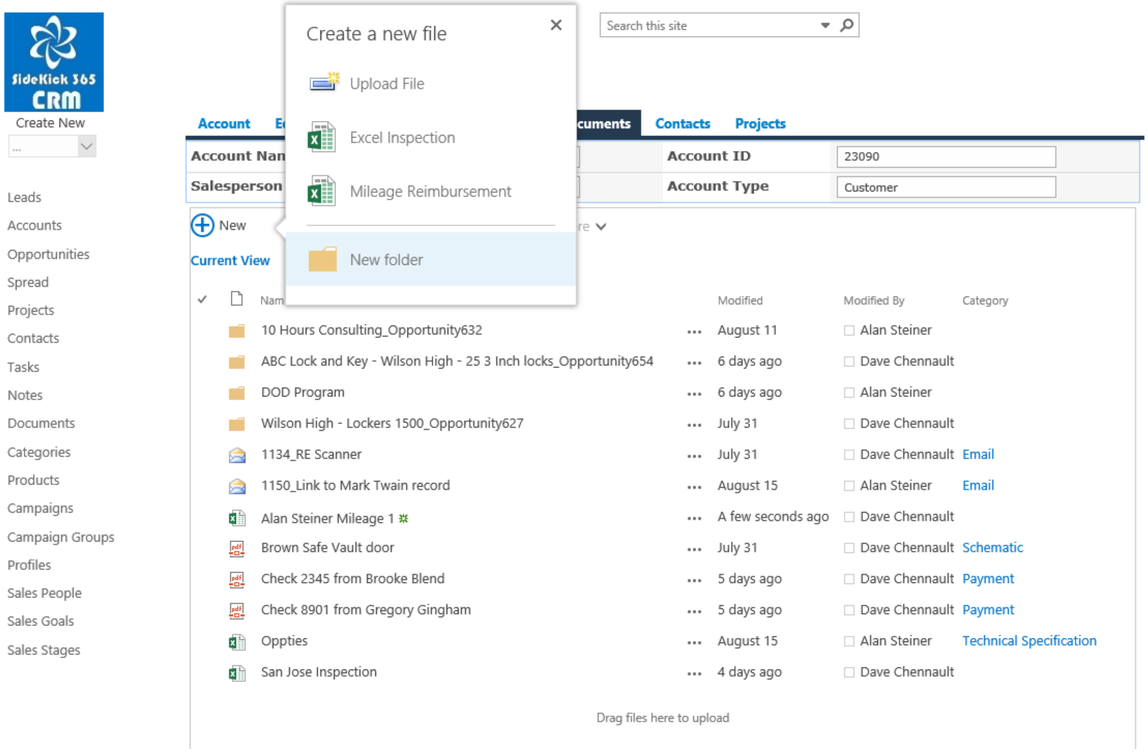
Tip – You can create a folder and group files within that folder. If you open a folder, just hit the Documents tab to get back to the main Documents view within the Account, Opportunity, or Project.

<u>Folders in the list of Docs</u>

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!

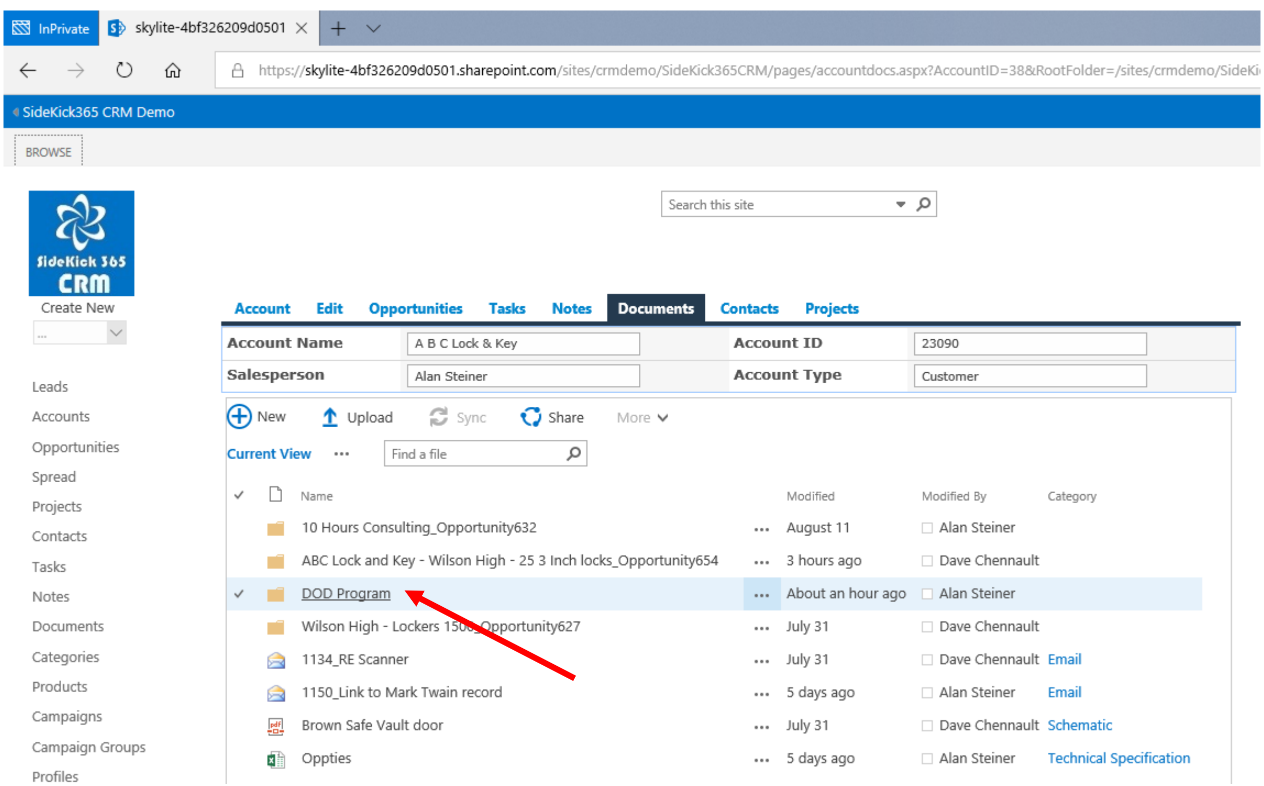
SideKick 365 CRM also creates a folder for any Opportunity associated with the account. This way, you can easily distinguish any documents associated with an account or an Opportunity associated with that account. You can also create folders as needed to help organize files associated with an item.

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.

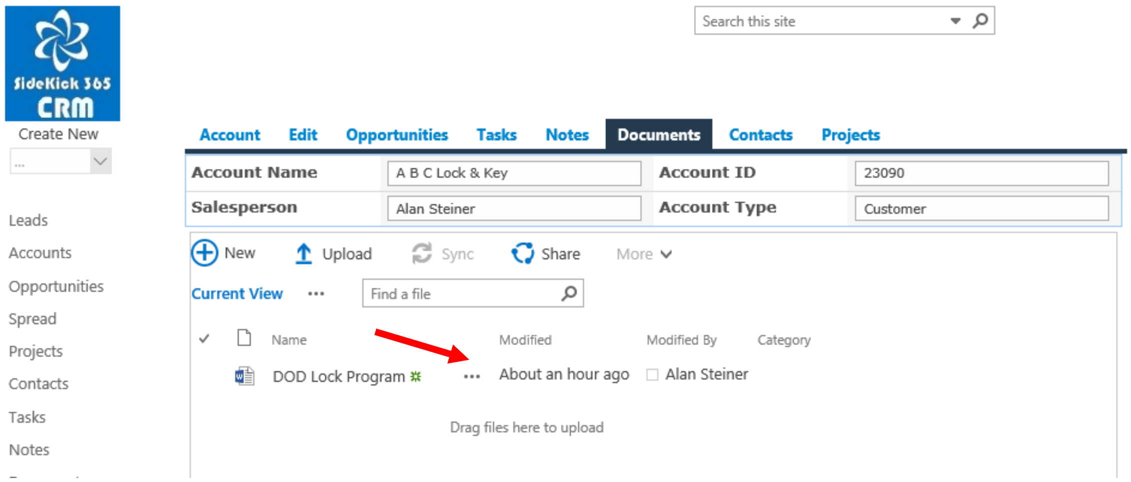


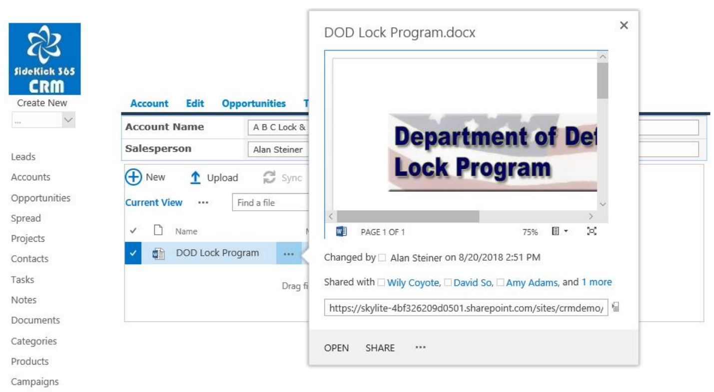
Let’s see folders in action and how they can be used within the documents tab.

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

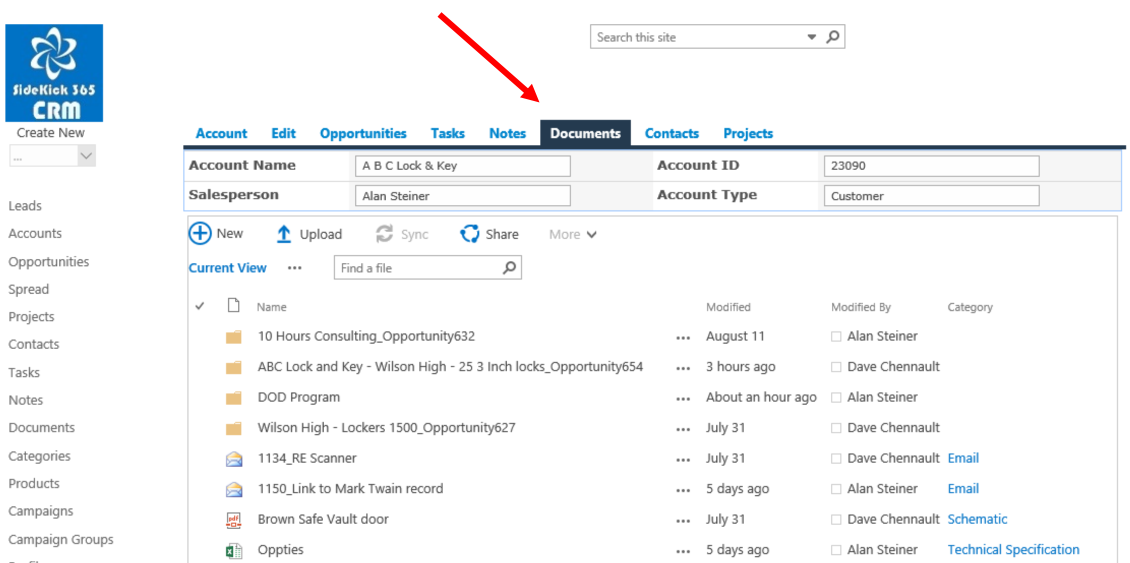


2. When the folder opens, you will see it has one Word file loaded into that in the folder. You can click on the three dots next to the name of the word file to see a preview.

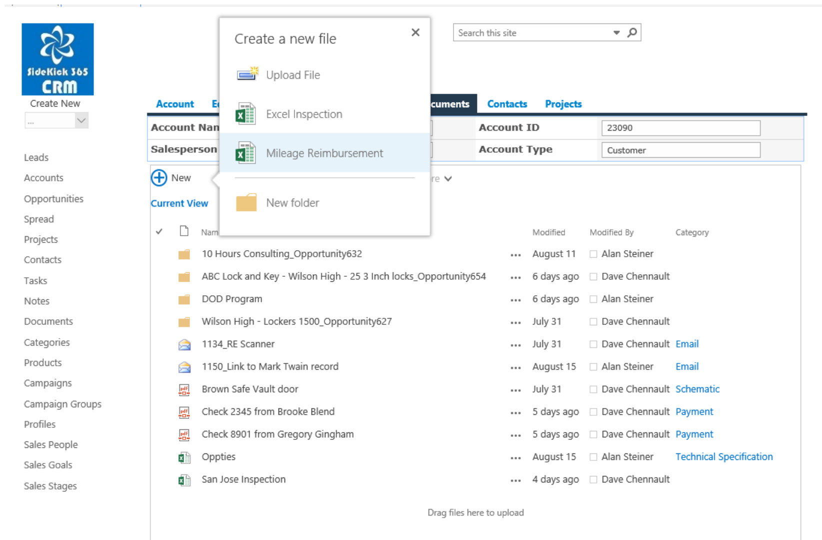




3. Now click on the Documents tab at the top of the screen to return to the main document tab of ABC Lock & Key.



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.

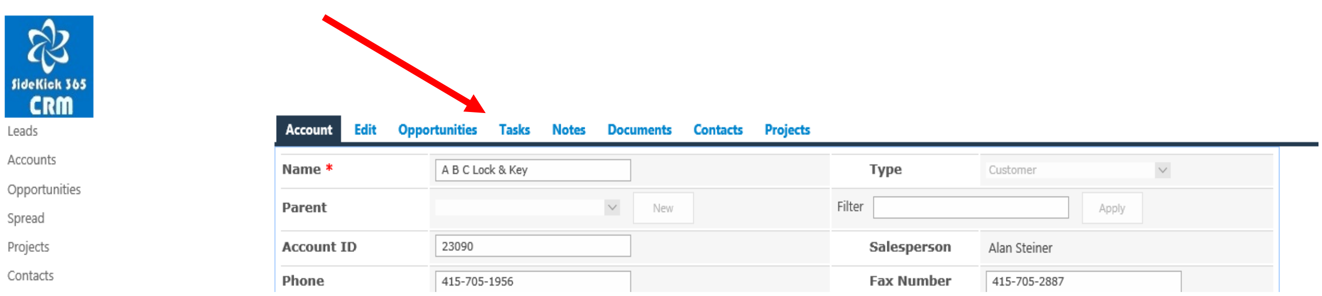
TIP – When you first open an Account or a quick launch within a module, give SideKick 365 CRM a moment to update the links behind each quick launch or to insert the header. You may notice a slight delay while a screen is assembled within the app depending upon your internet connection speed and the power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



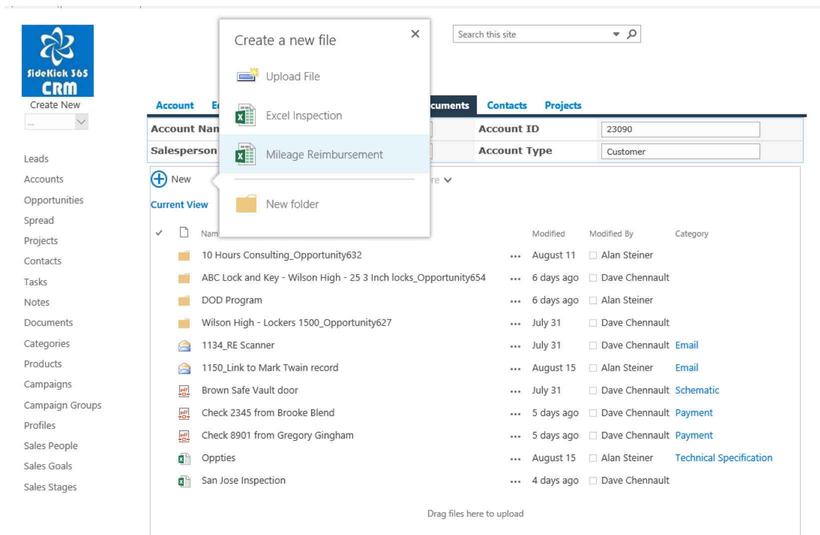
A Word about Using Content Types for Templates In SideKick 365 CRM

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.

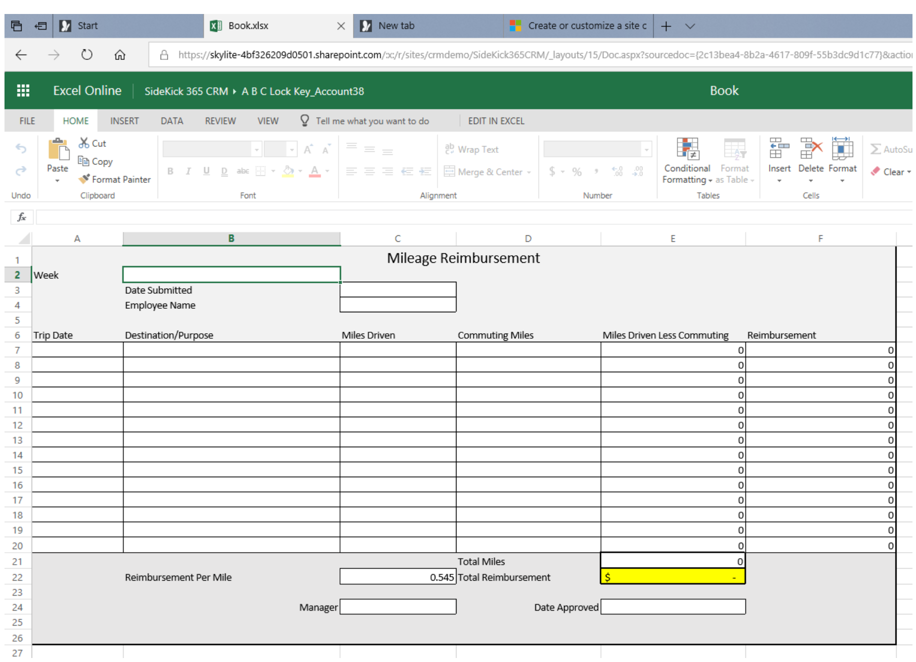
Using a Content Type as a template to great way to quickly turn a Word, Excel, PowerPoint or OneNote File into an electronic form that can be used by all SideKick 365 CRM Users. We created a Mileage Reimbursement form for the Demo by building an Excel spreadsheet with the fields and formula we wanted. 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.

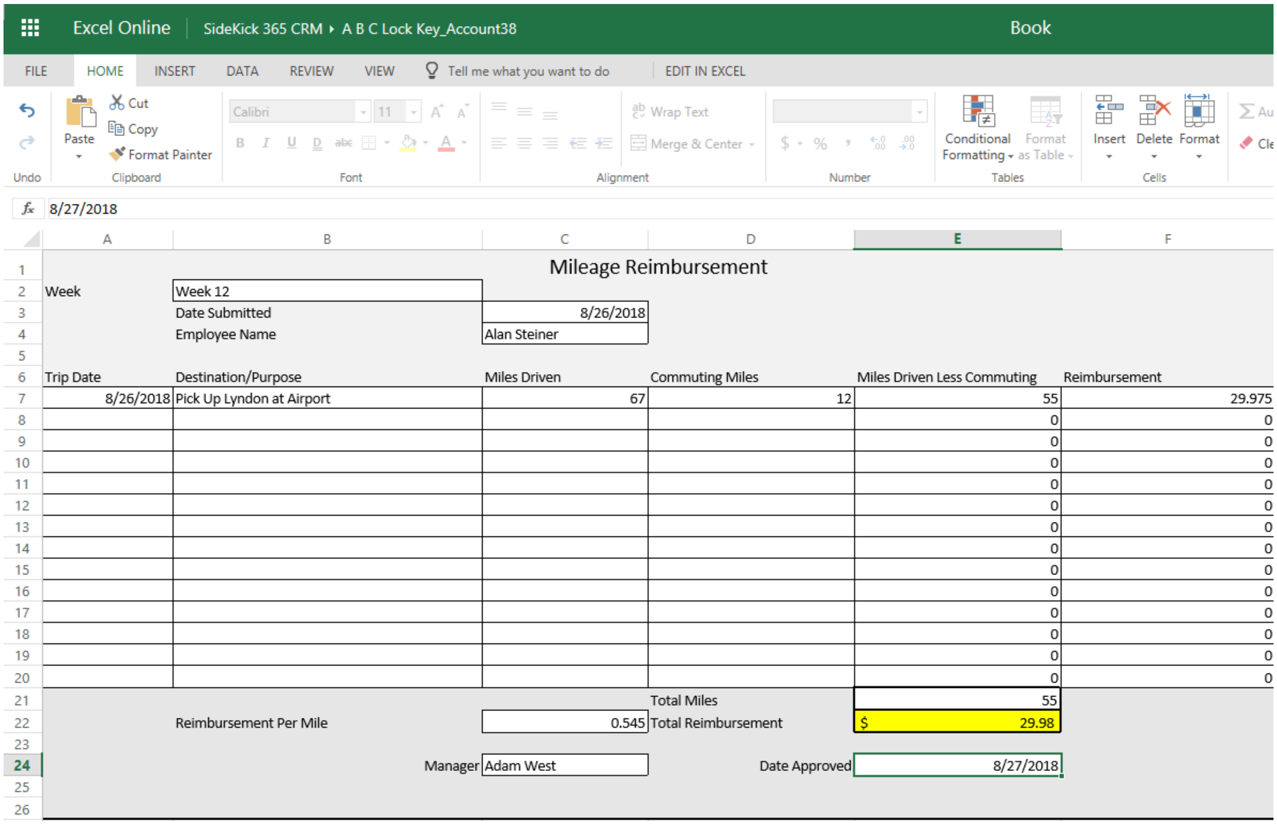
Step 1 - Select The New Option in the Docs Tab of ABC Lock and Key



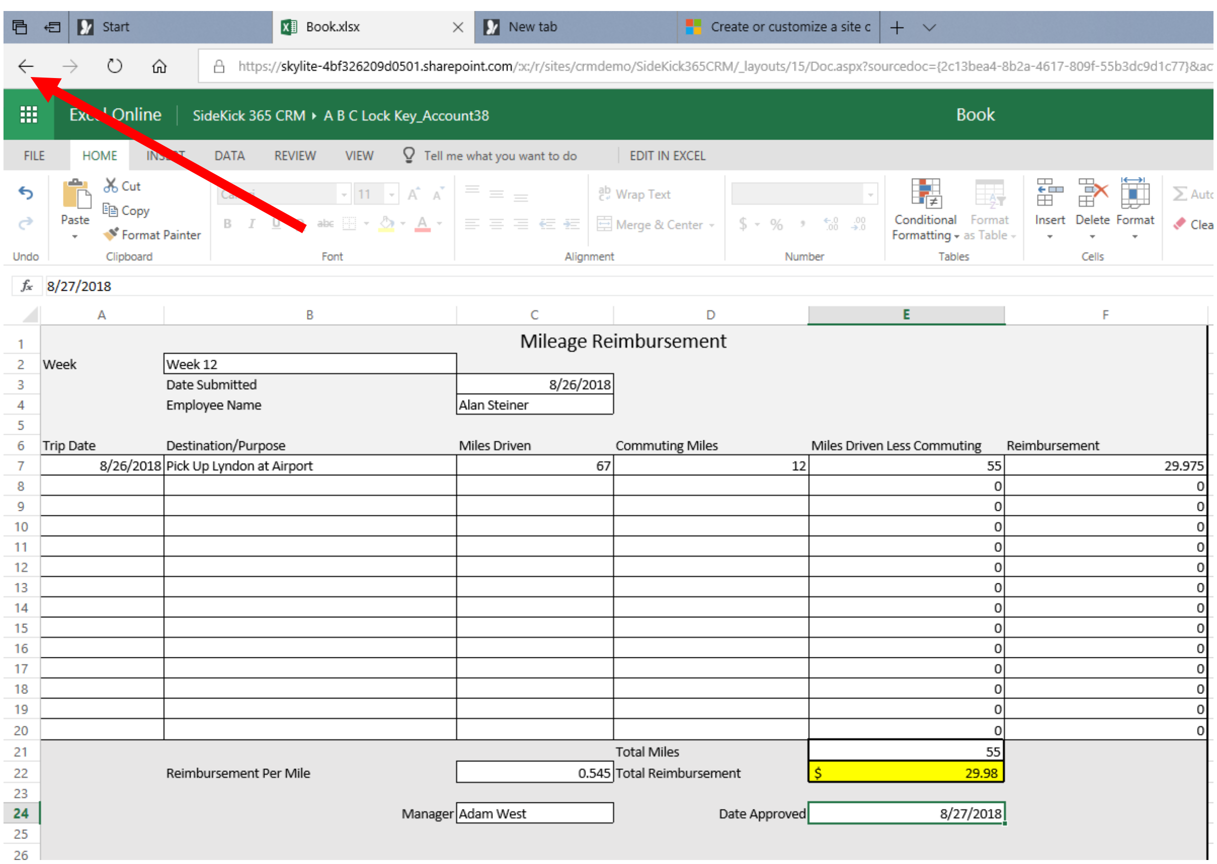
Step 2 – Select the Mileage Reimbursement Content Type template. This will activate a blank Mileage Reimbursement form (this is a Content Type made from an Excel Spreadsheet)



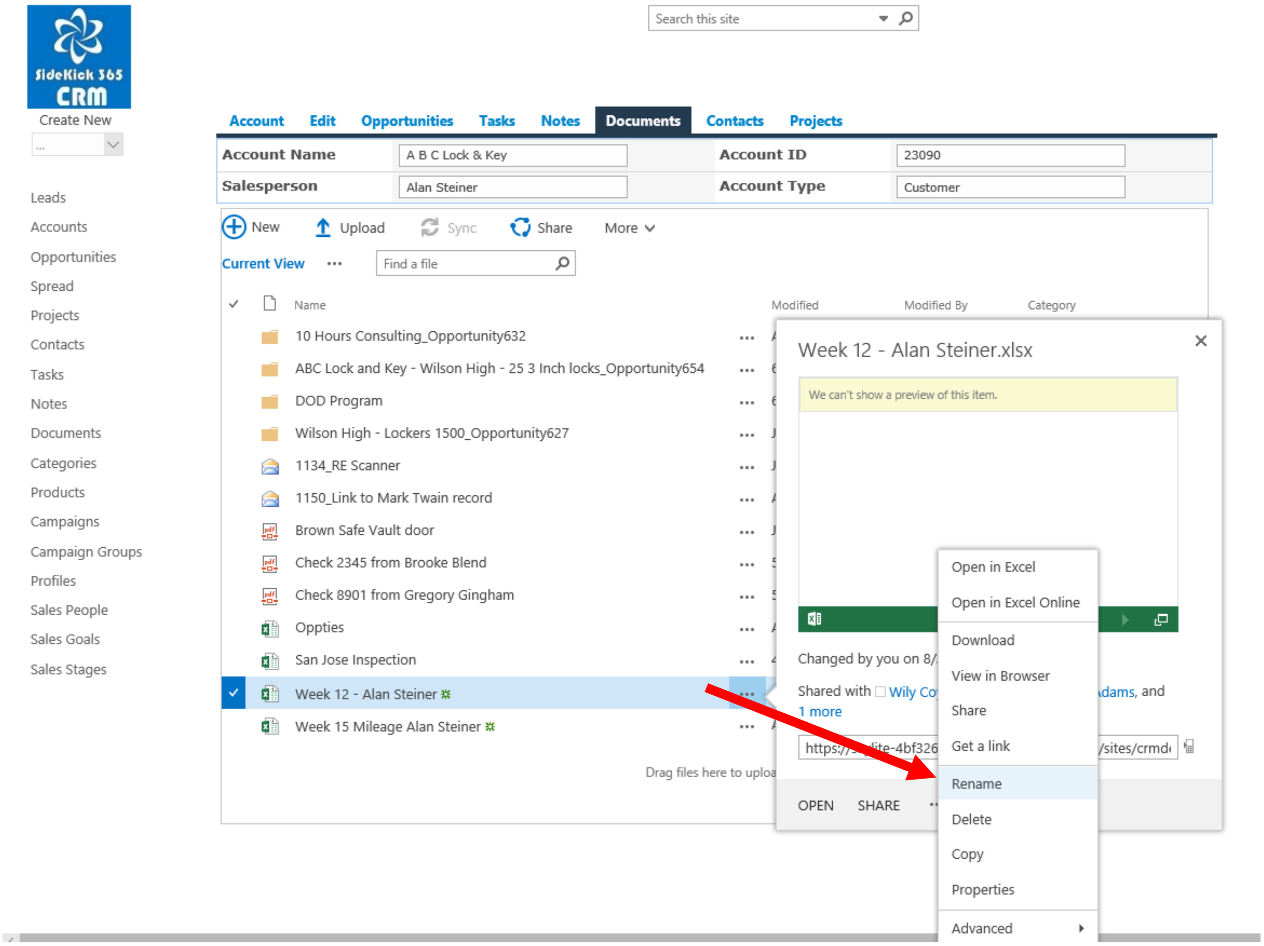
Step 3 – Fill it out with some data. NOTE - The Spreadsheet saves automatically – you don't need to hit save!



Step 4 – Hit he "Back Arrow" in the browser when you are done entering data



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



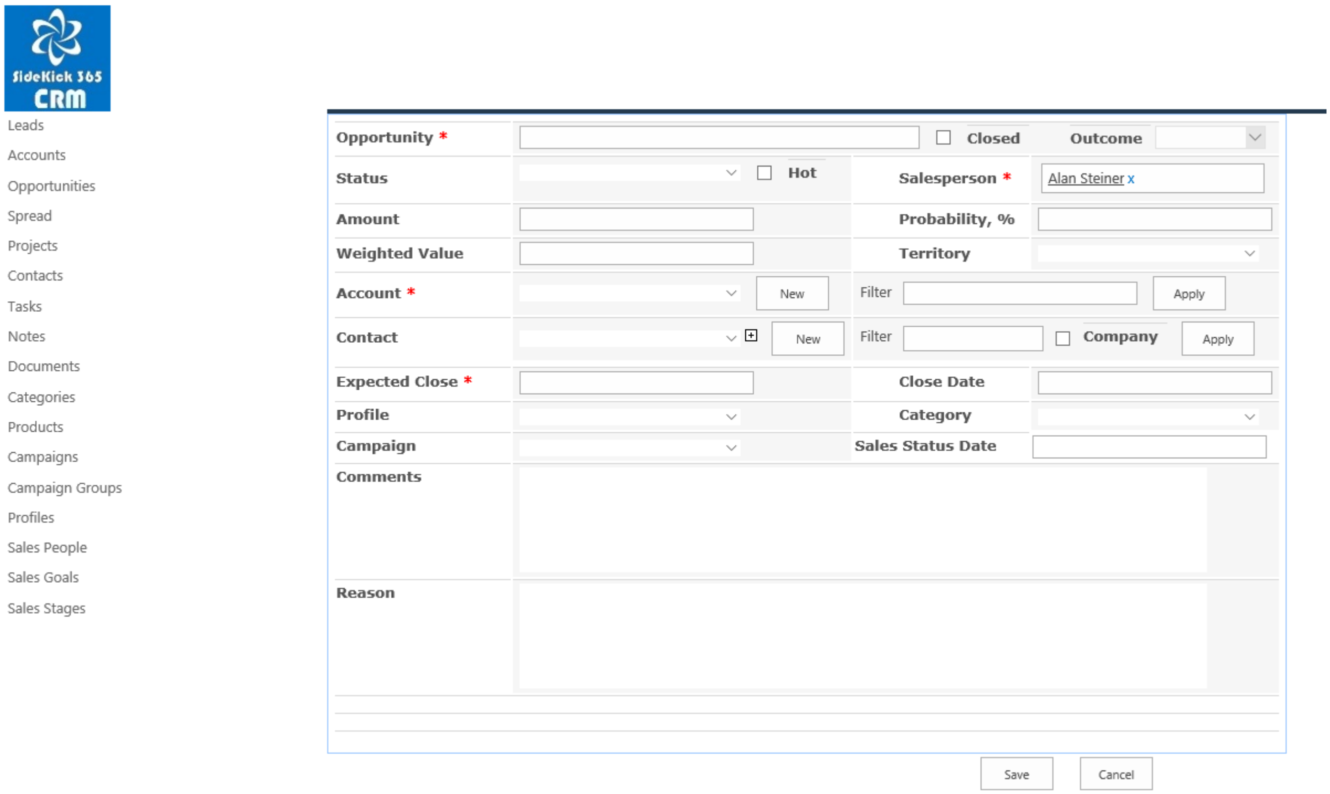
See the Appendix of this guide to learn how to add a new form using Word, Excel, PowerPoint, or OneNote template (file) using a Content type.

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



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.

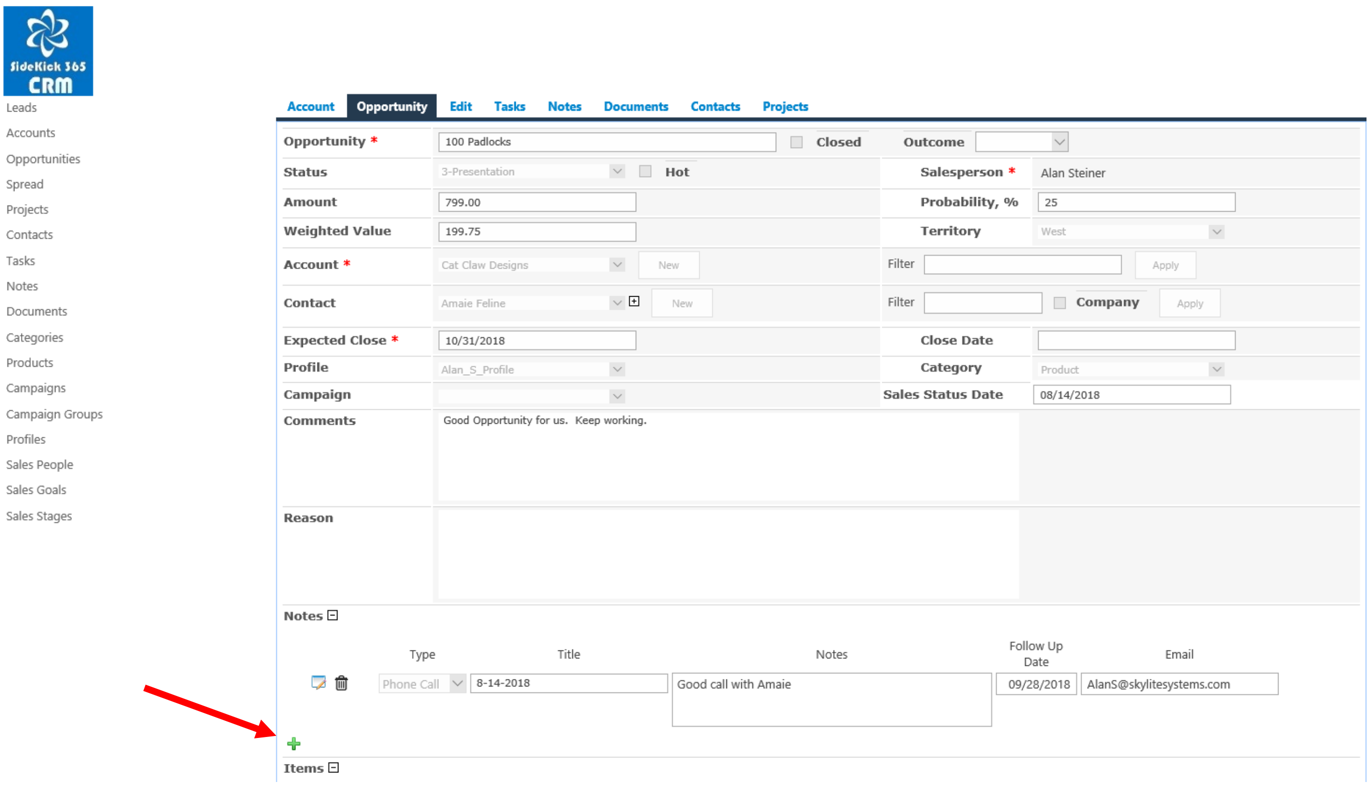
9 – Select the Save button on the new Opportunity screen to save the Opportunity you just created!

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.

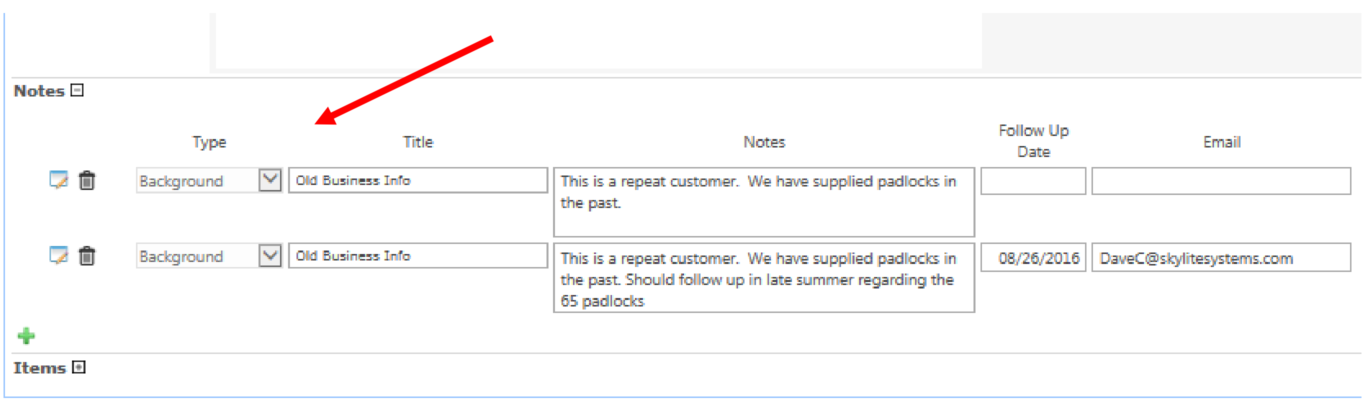
Notes in an Opportunity

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.



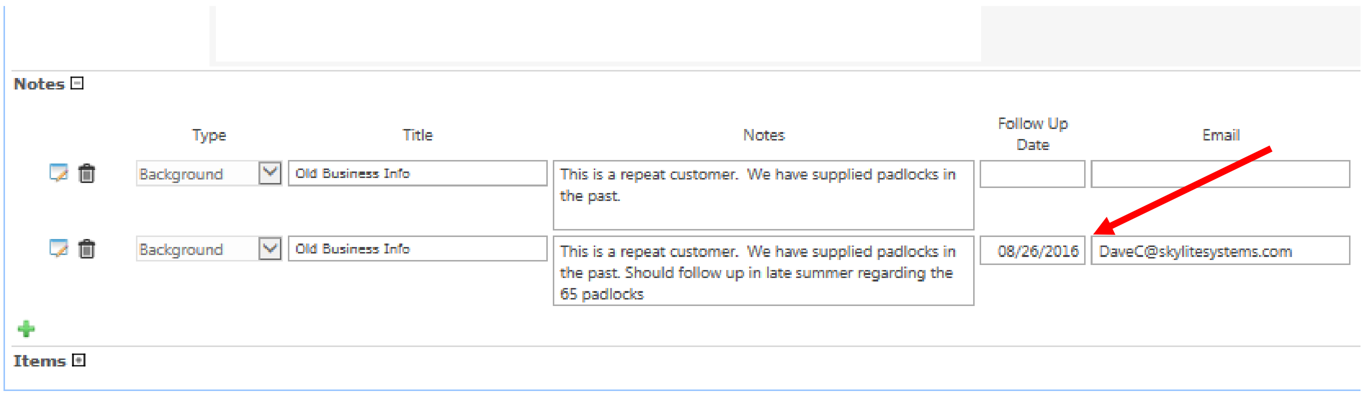
You will see the option to add Notes if there are no Notes in the Opportunity. The Notes Grid will automatically be open if there are any Notes already associated with the Opportunity.



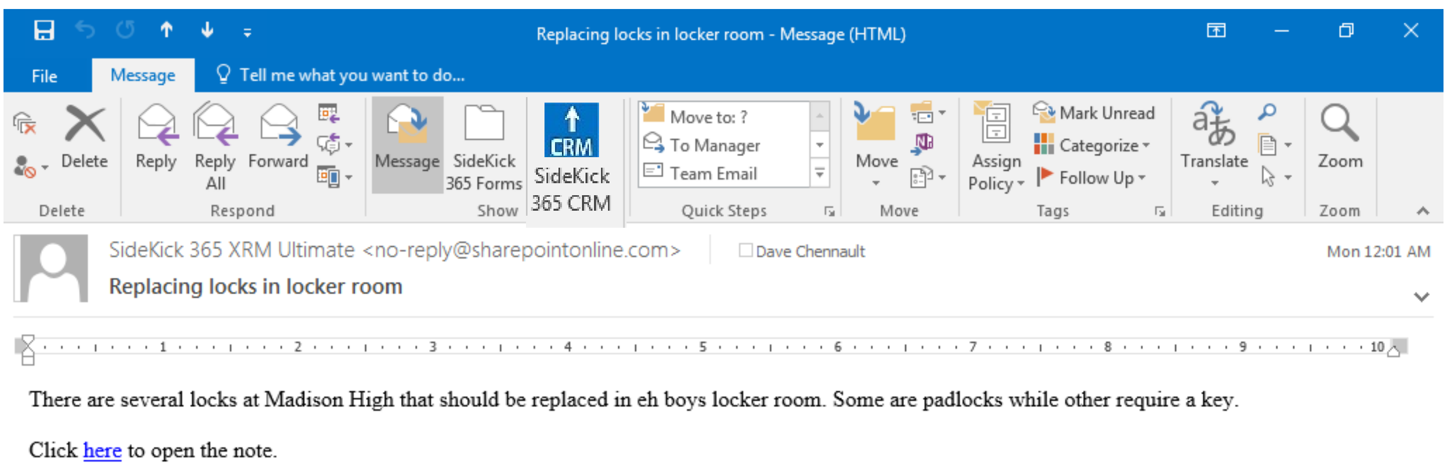
You'll also notice there are icons next to each not so you can save a new Note and edit or delete an existing Note. You can also easily update the Type dropdown in Notes so you can easily track a Note.

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.



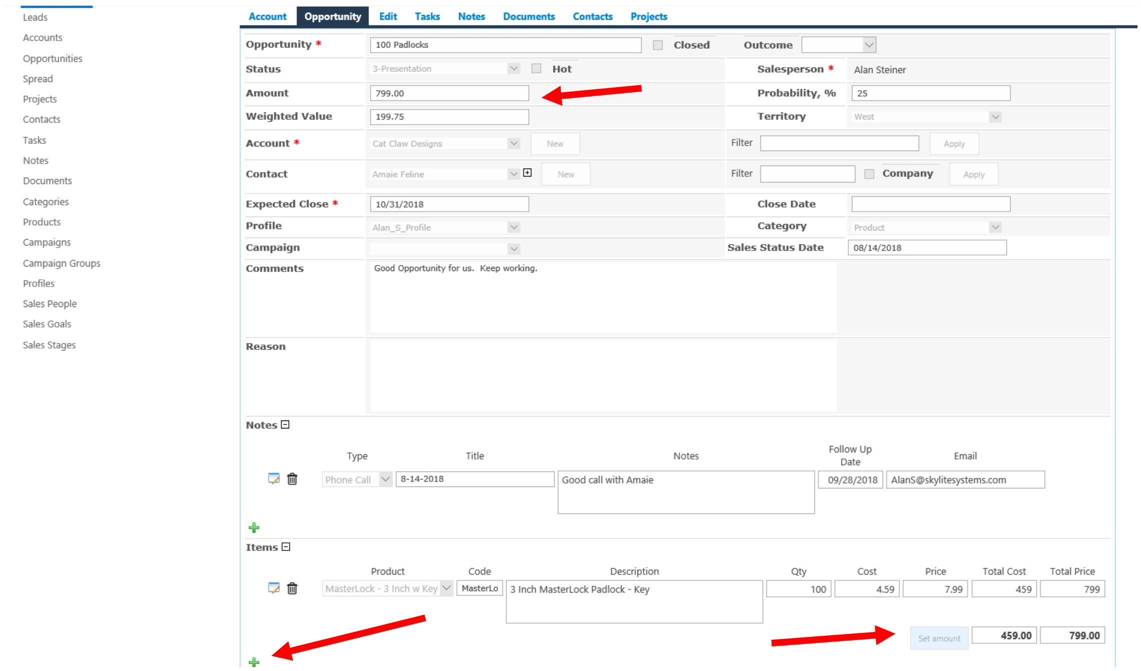
Here is a sample of the reminder email that is sent at one minute past midnight on the date you set in the reminder so it is available first thing in the morning.



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…

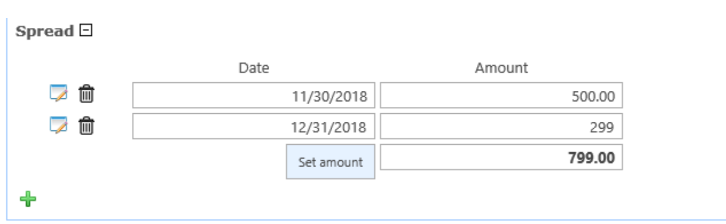
Here is how to “spread” an opportunity across many periods of time:

1 - To spread transactions across several periods, enter in the basic information about an Opportunity and then hit the Save button.

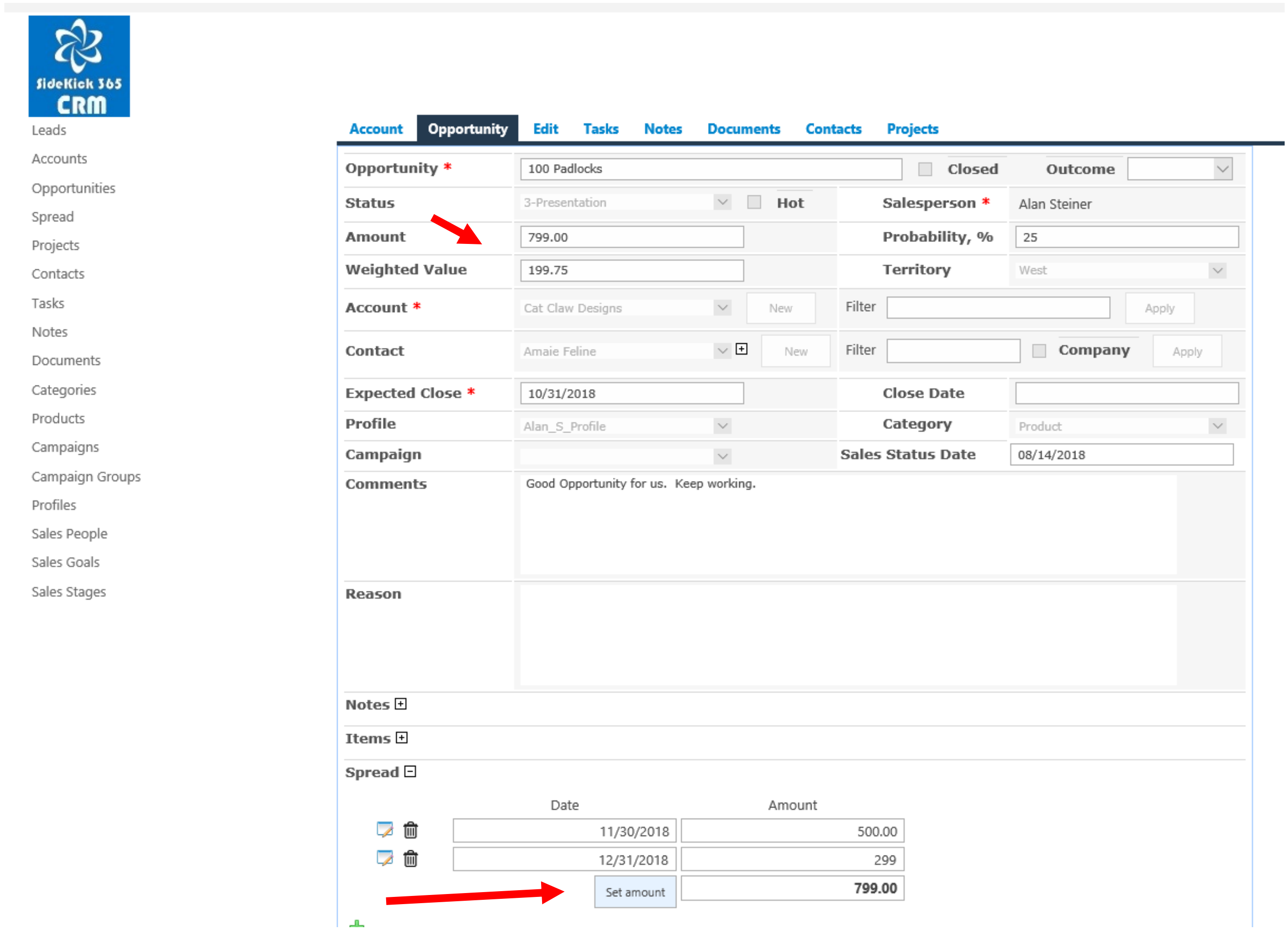
2 – Once the Opportunity is saved, you will see several new grids available at the bottom of the Opportunity including Spread. Go ahead and expand Spread by clicking on the little plus (+) and then use the green plus sign to add a new spread enter.

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 with 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.

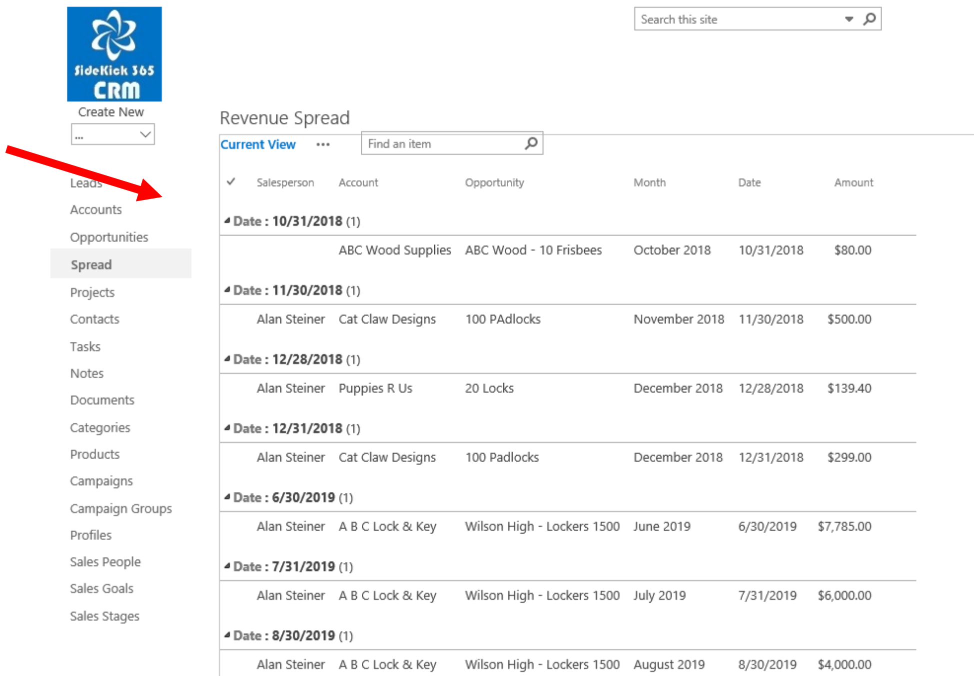


Reporting on the Spread Values

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.

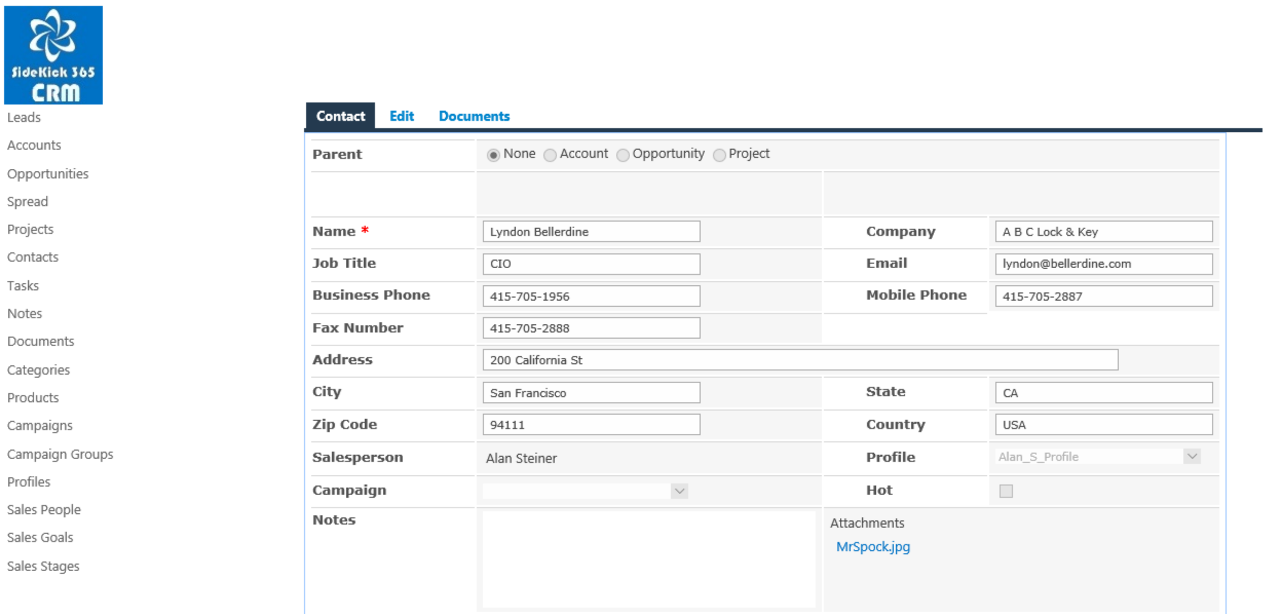


Tip – You cans use the same day of the month when you enter a spread item to simplify reporting – I like the last day of the month – then you can use the date in the "Group By" as show in the report example in this guide.

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.



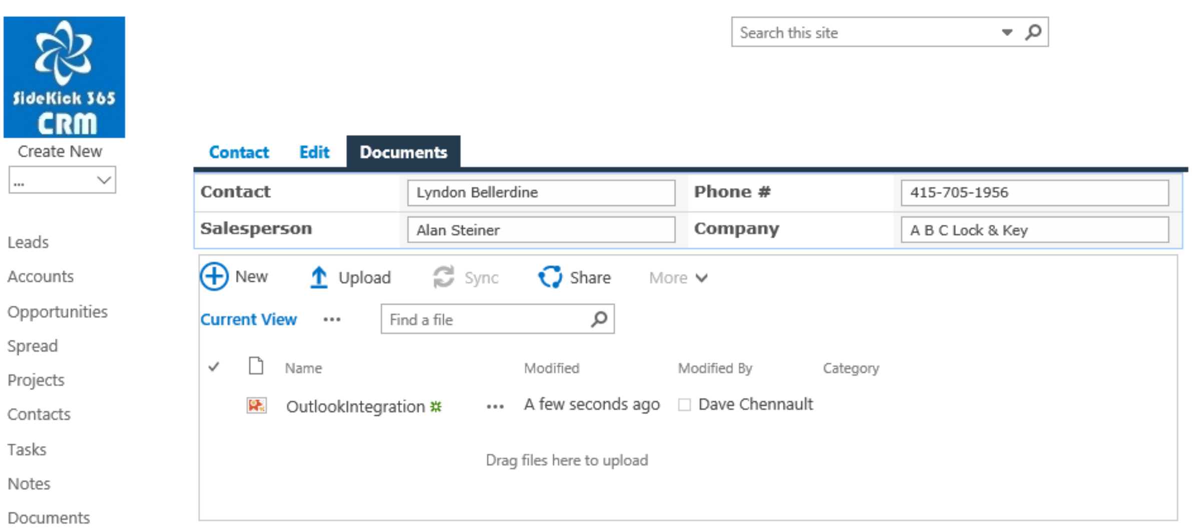
A few important points on this screen:

1 - Campaign – You can associate a Contact with a Campaign to track who you meet through various marketing Campaigns

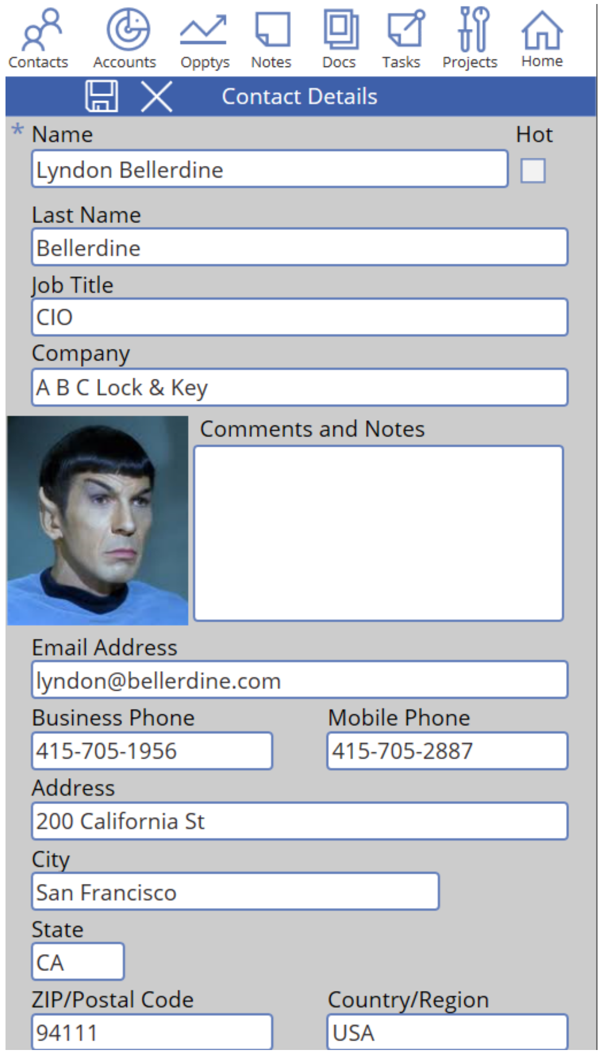
2 - Attachment – You can attach an image to the Contact to display an image in the PowerApp as shown below.

3 - Hot – You can indicate if a contact is HOT

4 – You can add and associate Files with a contact using the Documents Tab



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.

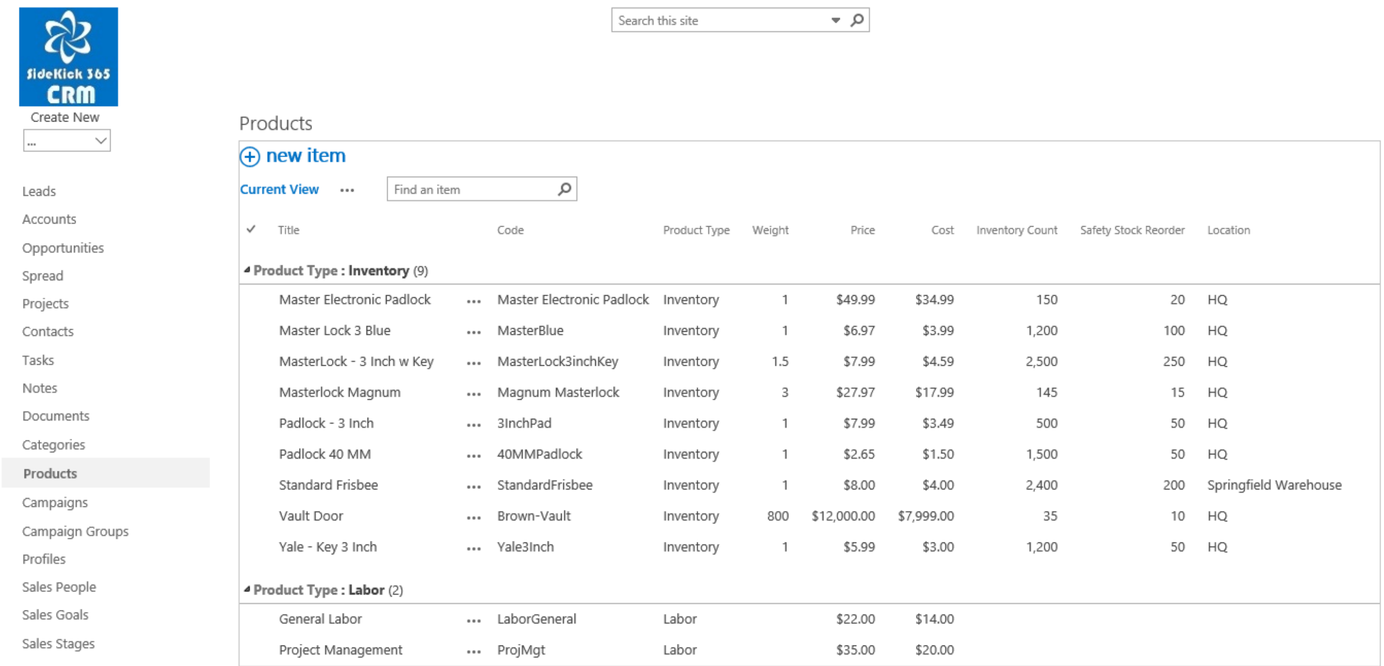


Products

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,

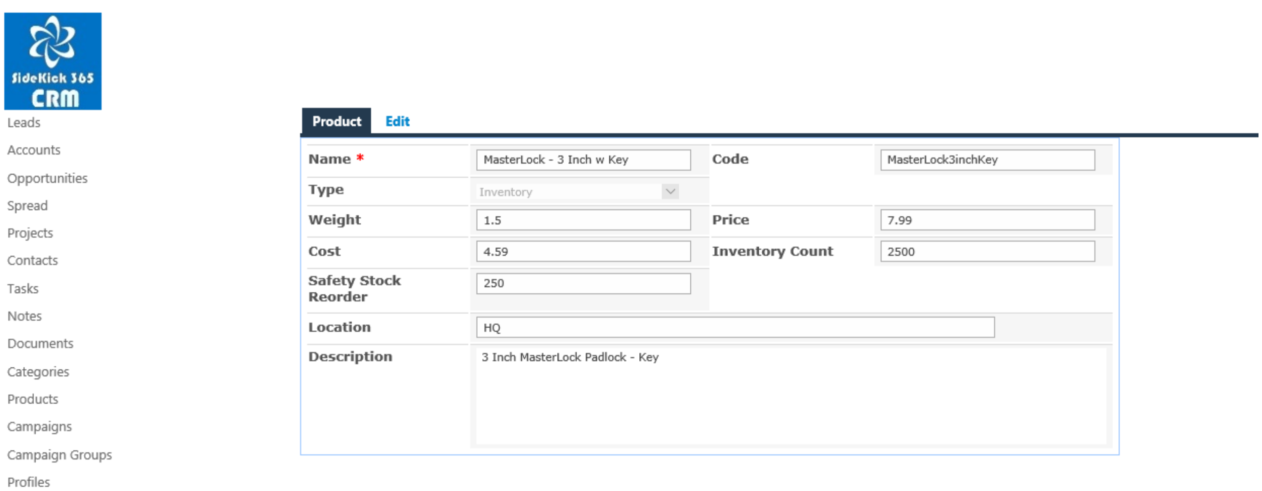
1 - Select the quick launch to the Products module.

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.



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.



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!

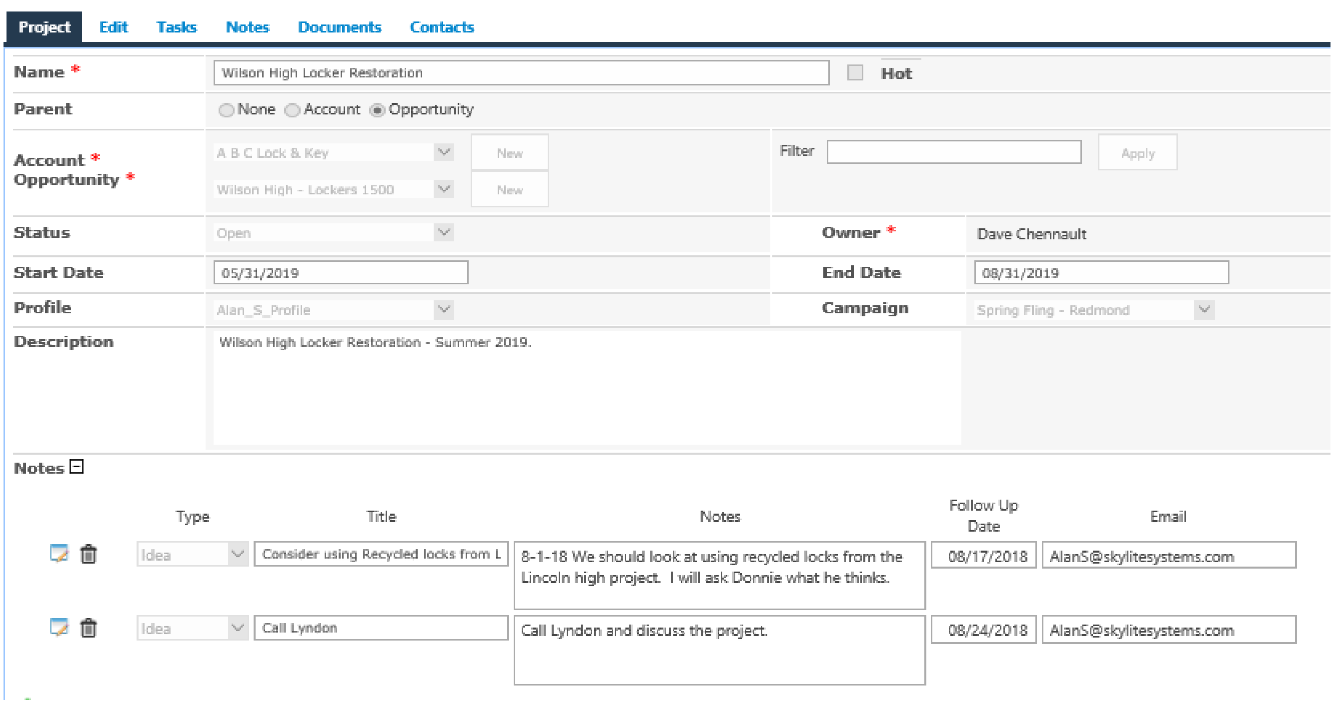
Projects are customizable and it is easy to add fields as needed to the Project template shown below. Take notice the combination of grids and tabs for navigation. We put the Notes, Products, and Time tracking as grids on the front page for easy reference and simple editing. Note that you can also track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

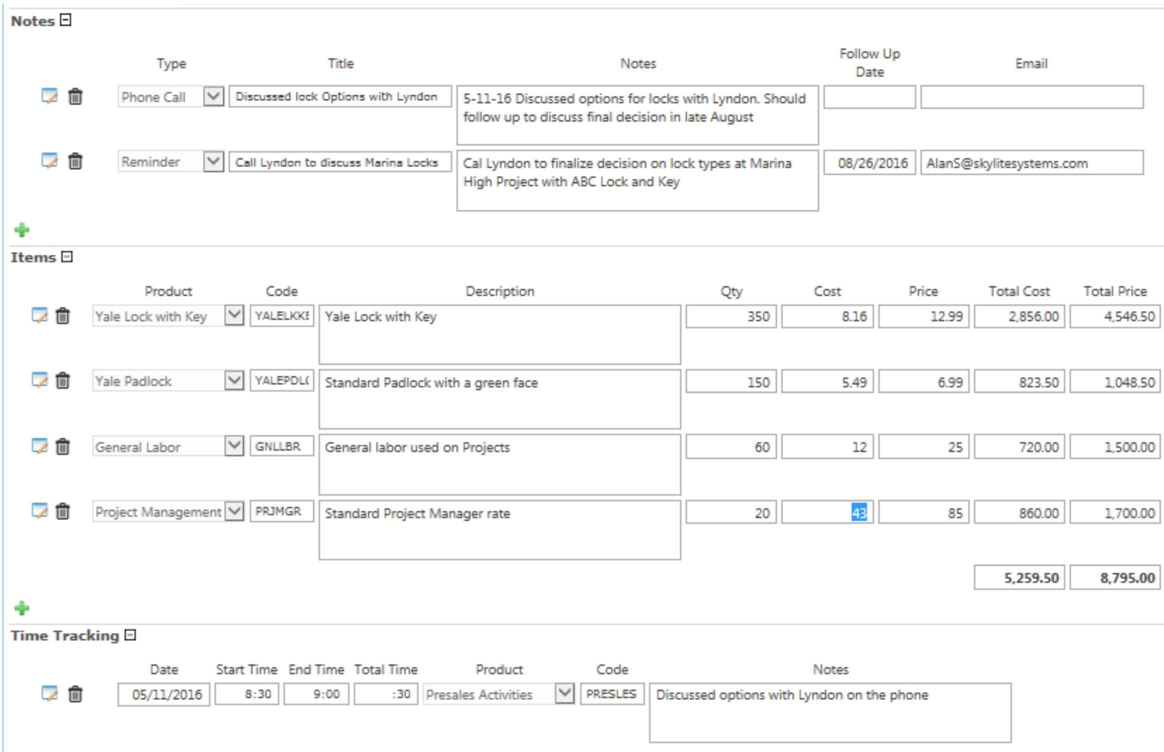
2 – Decide if you want to attach the Project an Account, Opportunity, or make it Stand-alone (not attached to anything)

3 – Fill out required information and hit OK



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	YALELKKE	Yale Lock with Key	350	8.16	12.99	2,856.00	4,546.50
Yale Padlock	YALEPDLC	Standard Padlock with a green face	150	5.49	6.99	823.50	1,048.50
General Labor	GNLLBR	General labor used on Projects	60	12	25	720.00	1,500.00
Project Management	PRJMGR	Standard Project Manager rate	20	43	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.

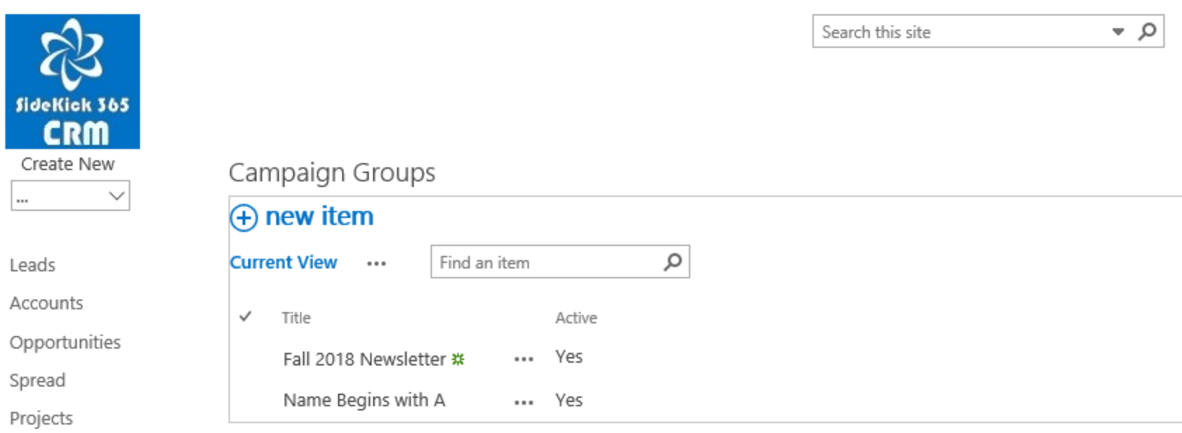
<u>Campaign Groups</u>

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.

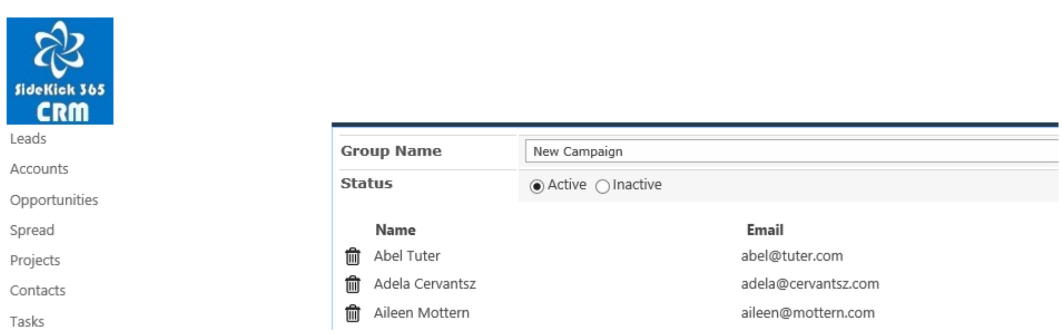
Building a campaign group is easy. We'll take a look at a few different ways to build them.

<u>Method 1 – Creating a campaign group manually</u>

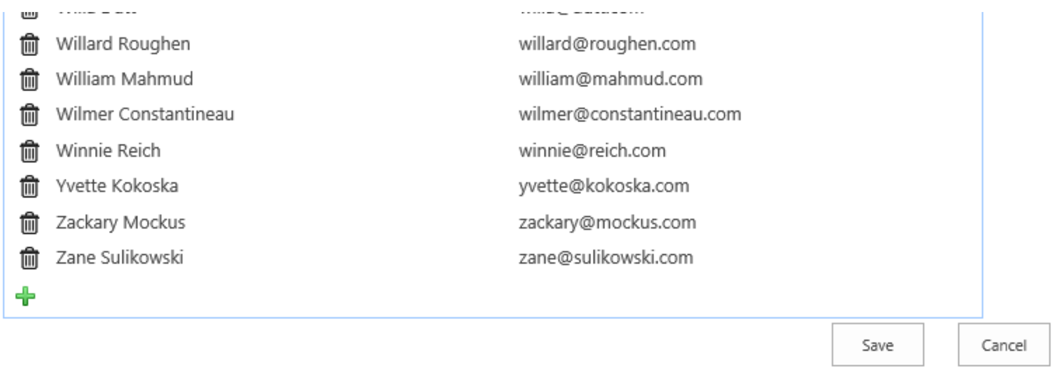
Step 1 - Select the Campaign Groups Module and select "new item" to create a new Campaign Group as shown below



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.



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.



Method 2 – Using a view from Contacts

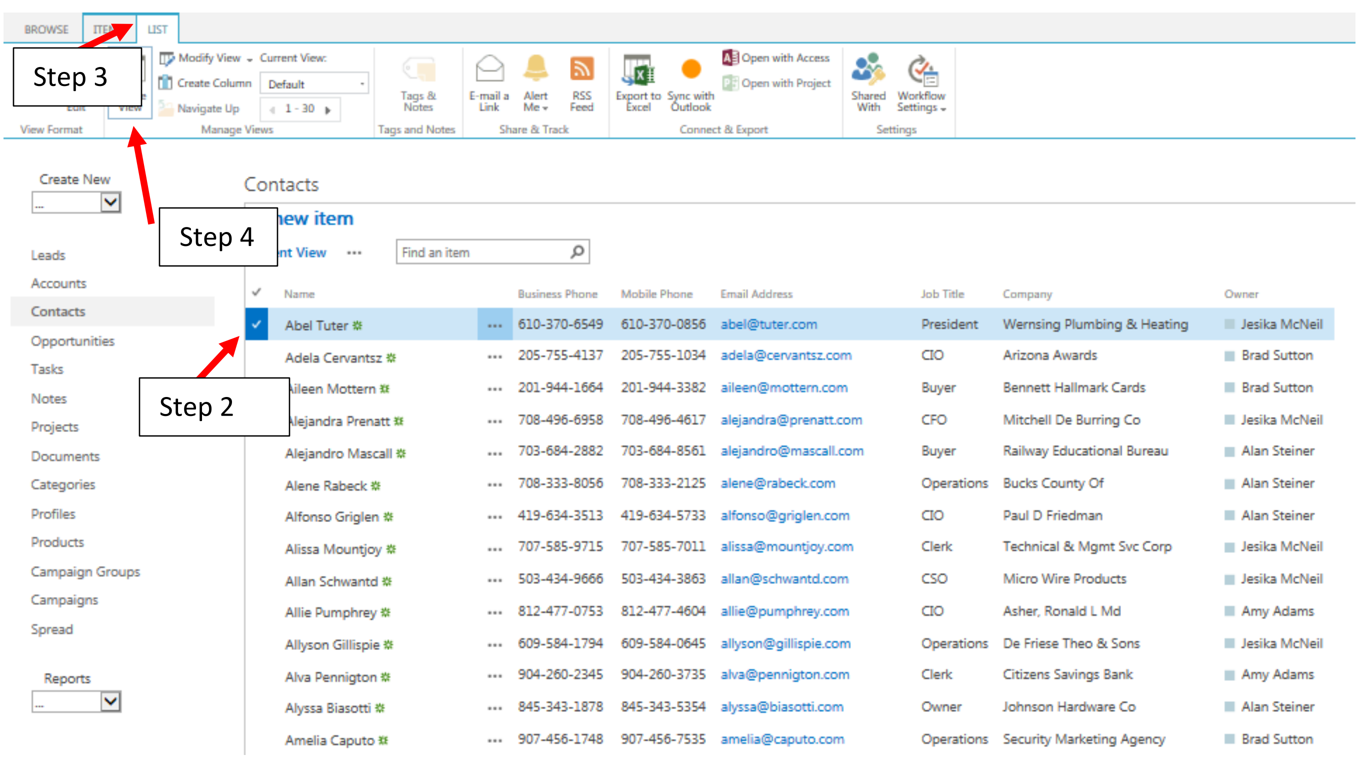
You can build a list view in the Contacts Module and then use that list view to create a Campaign group. Let explore how to do that.

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

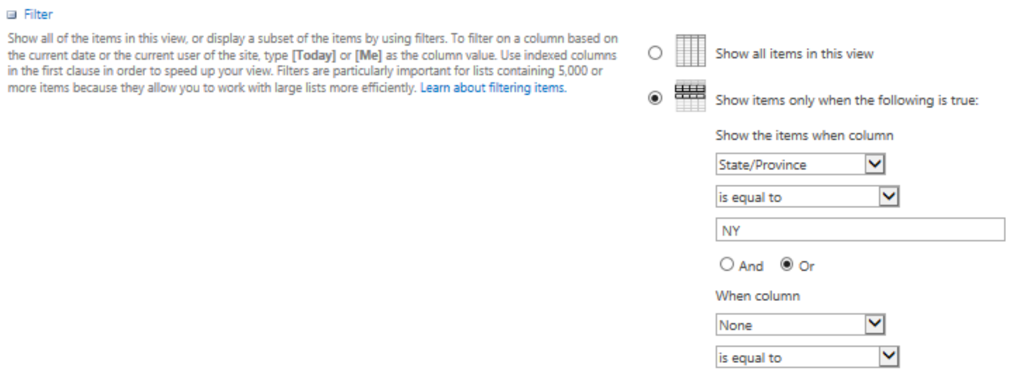
Step 2 – Select any Contact in the list with a single click (see below)

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)

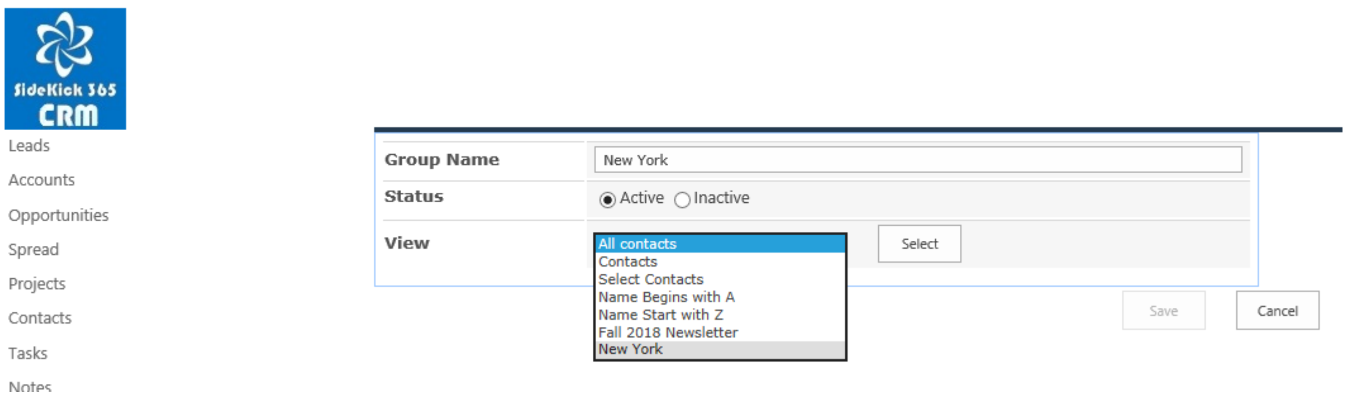


Step 5 – Create a List view and filter based upon desired criteria. In the example below, we are building a campaign group for all contacts in New York.

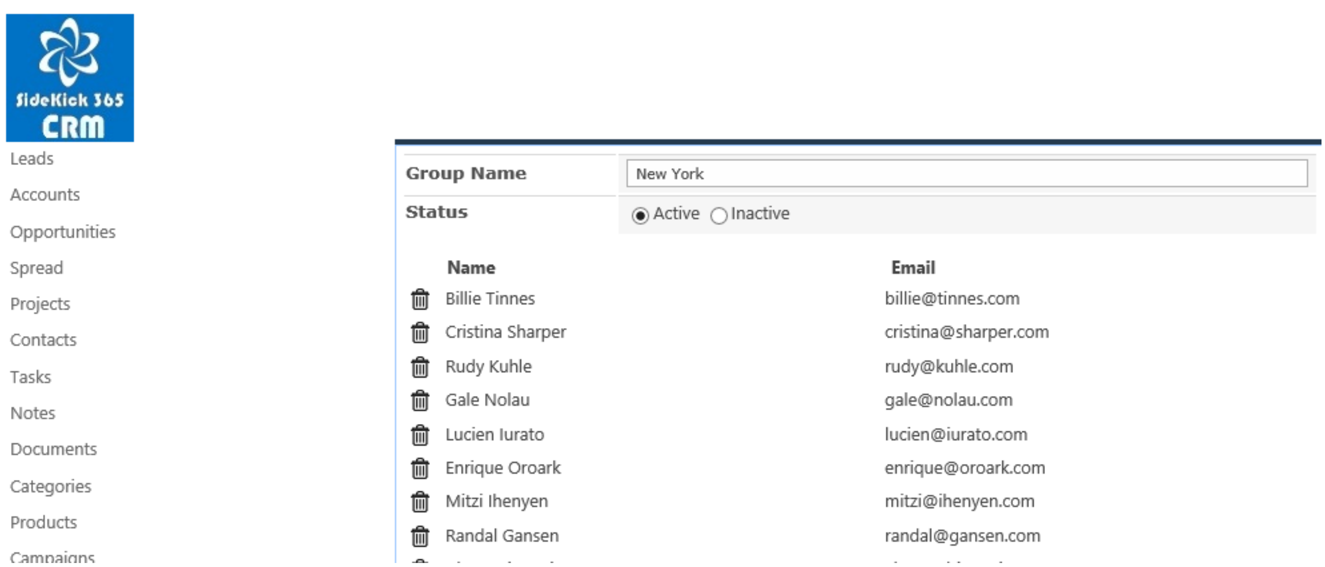


Step 6 – Once this list view in Contacts has been saved, it can now be used to create a Campaign group. Open the Campaign Group module and select “New Item”

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



Step 8 – All the contacts from the New York List are automagically 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.



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….

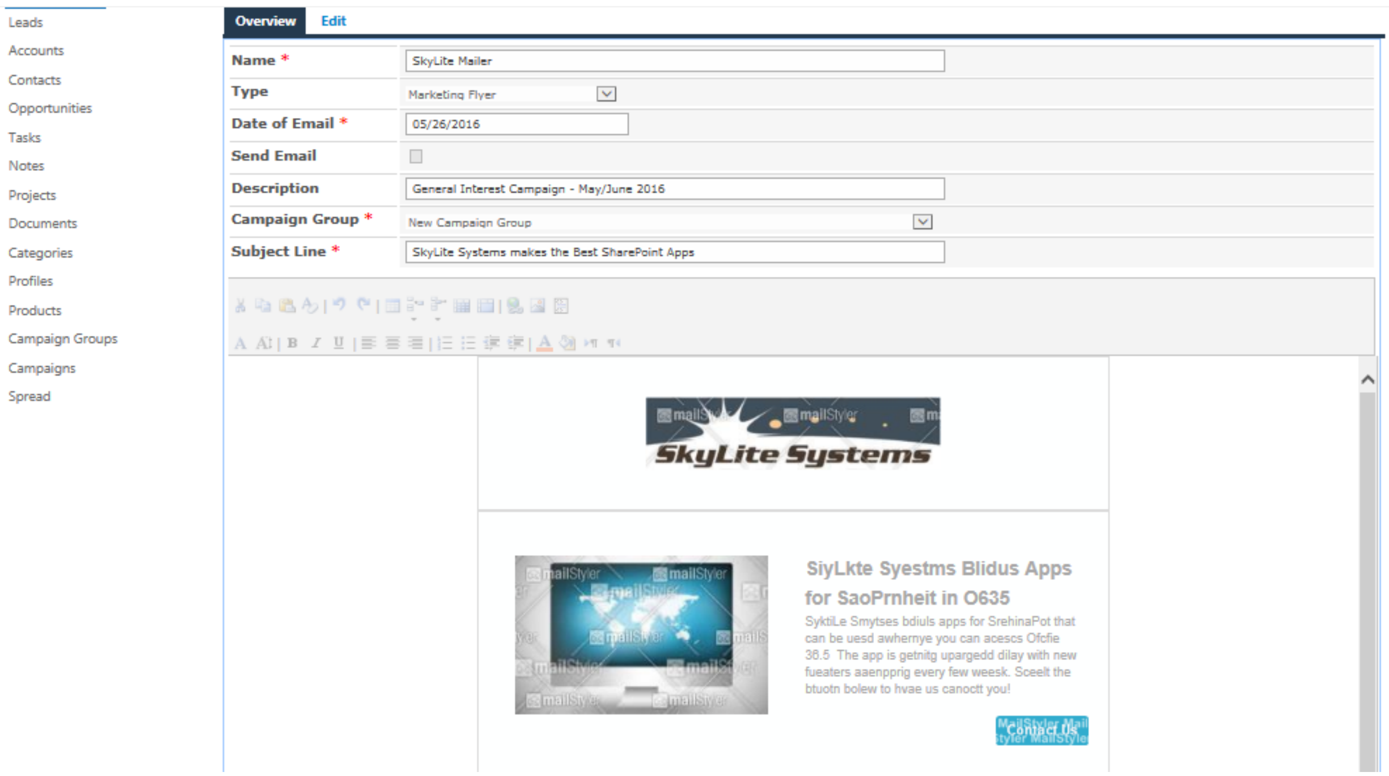
Step 1 – Create a new Campaign by selecting the Quick launch called Campaigns and then select "New Item"

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!

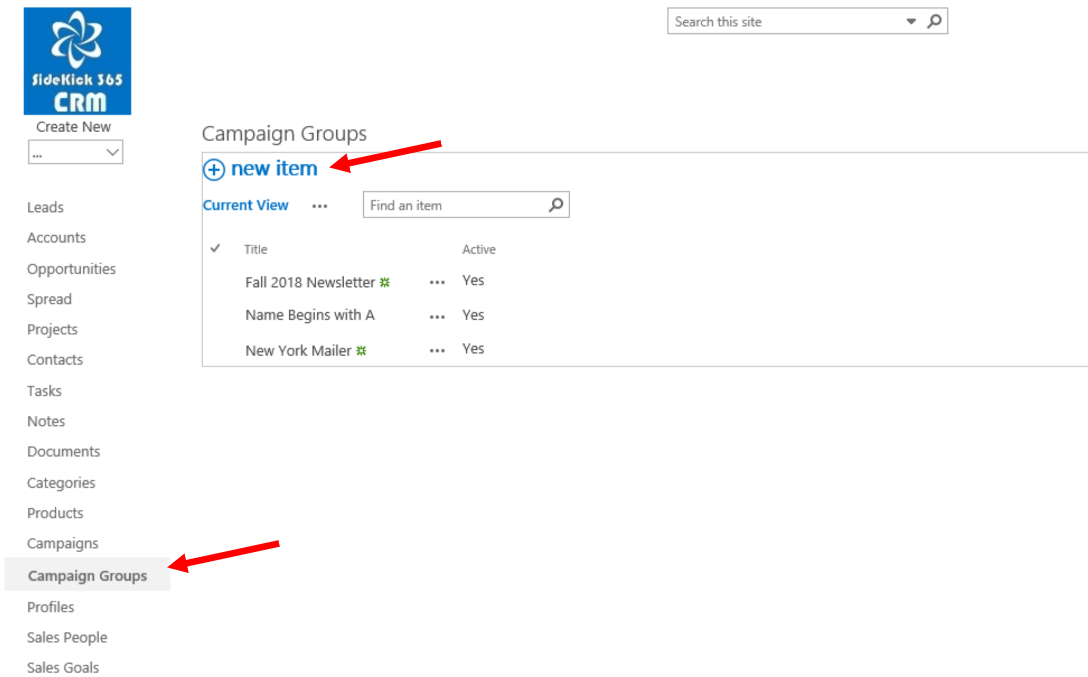
Step 5 – Select the Send Email checkbox and an email will be sent to each recipient in the Campaign Group



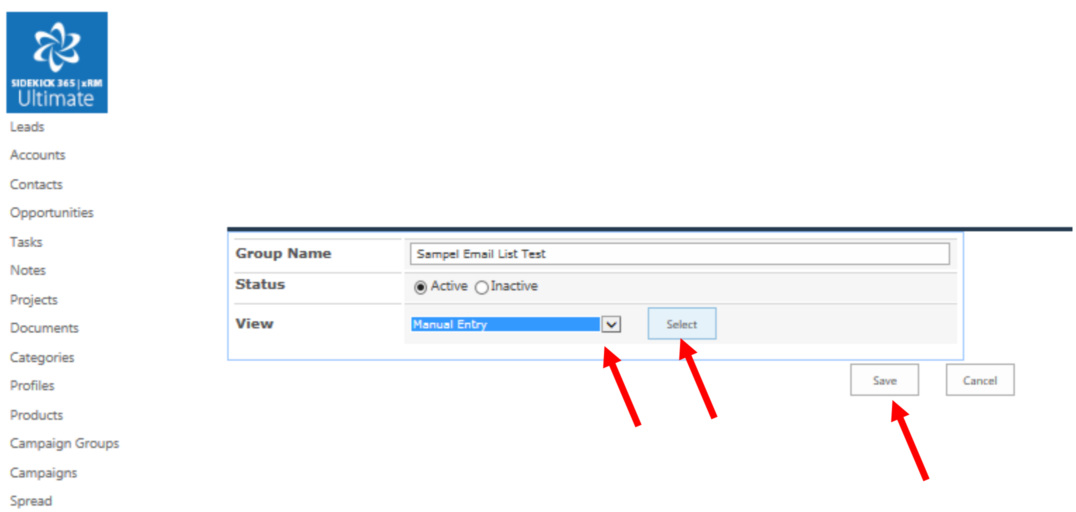
Sending a Test Campaign – Your turn to try it out!

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

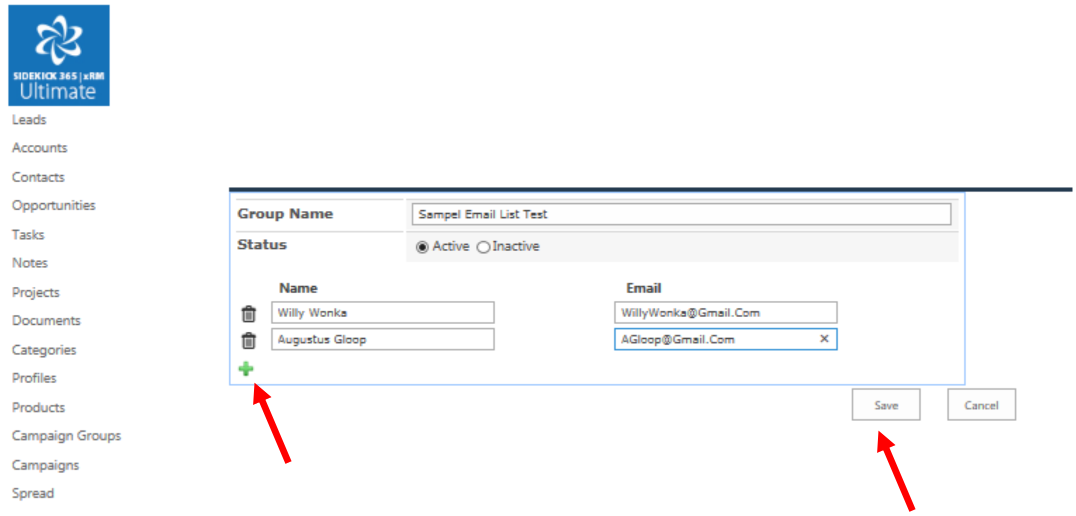


Step 2 - Now give the test campaign group a name and pick the "Manual Entry" option in the dropdown then hit the select button as shown below



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



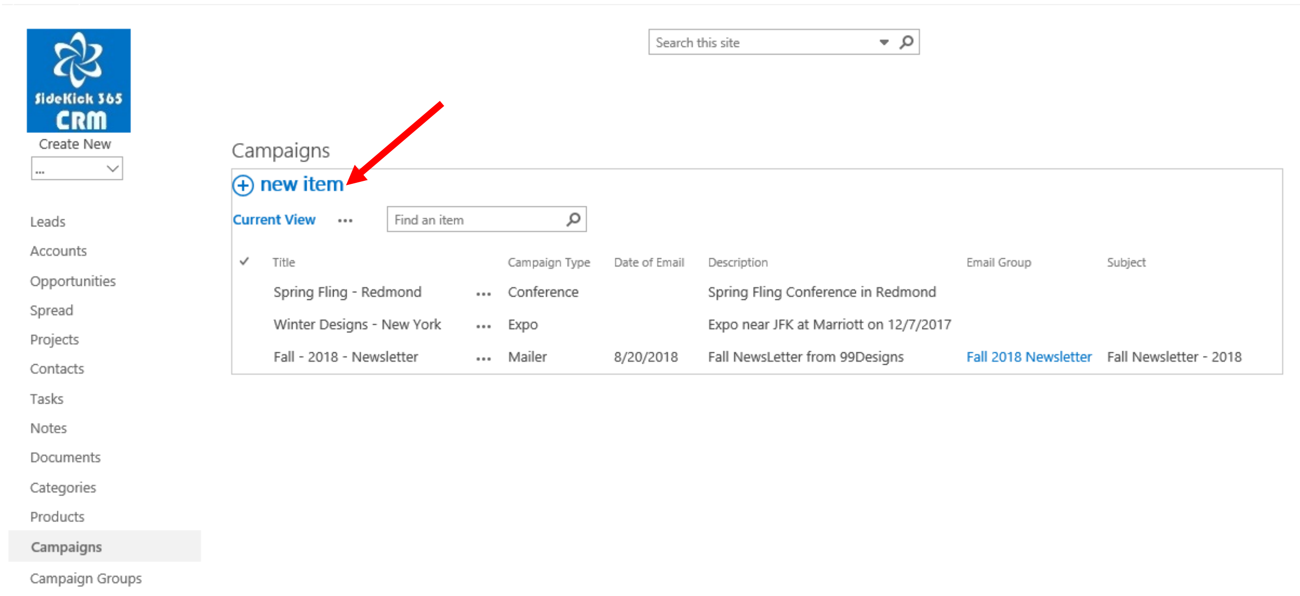
OK – now you are ready to use the Campaign Group you just created to send out a mailer within the campaign module.

Creating a Campaign

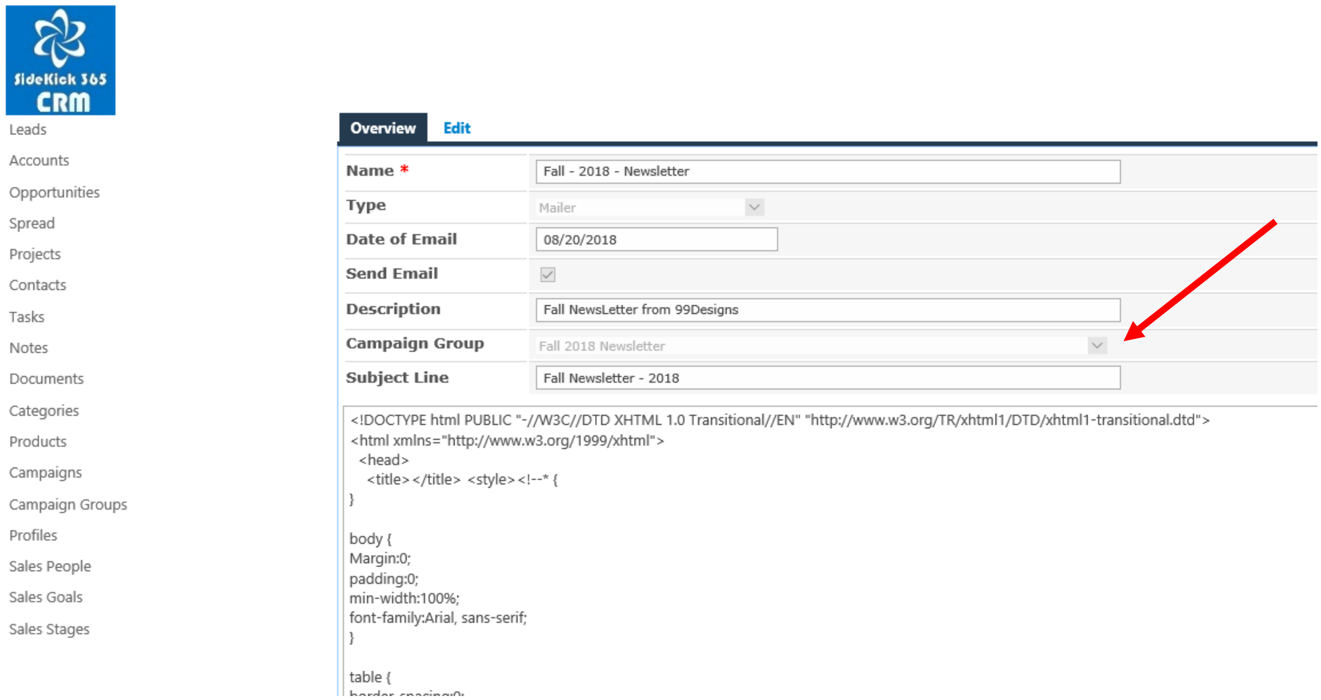
Follow the step below to make a simple email campaign

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.



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 took 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.



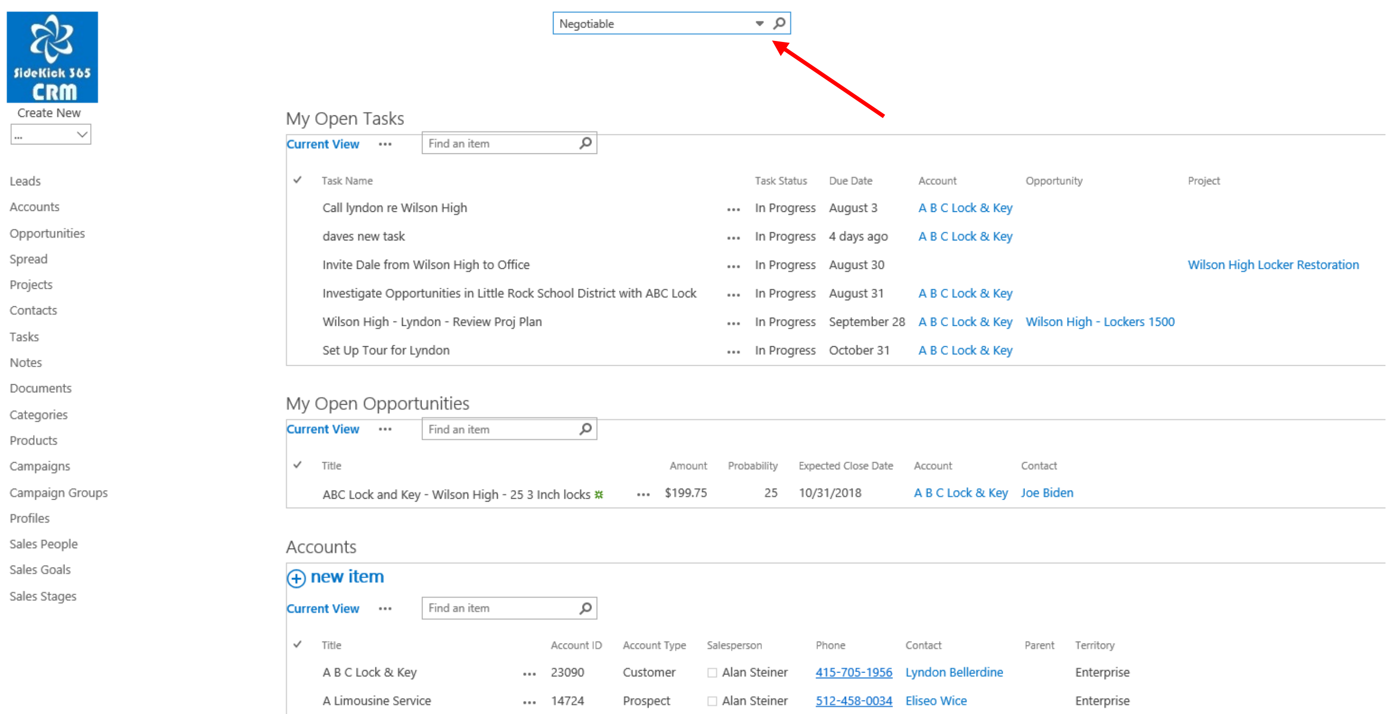
Step 4 – When you are ready to send the email campaign, select the “Send Email” checkbox. Note – you can save the campaign without sending if you do not select the Send Email checkbox. You can open it at a later time and hit the edit option, then hit the Send Email and save the campaign record and the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

Go ahead and give it a try!

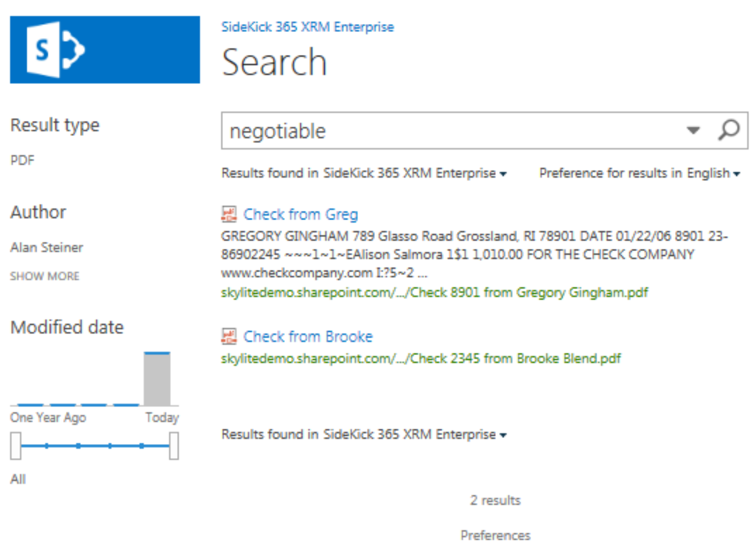
Searching

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.

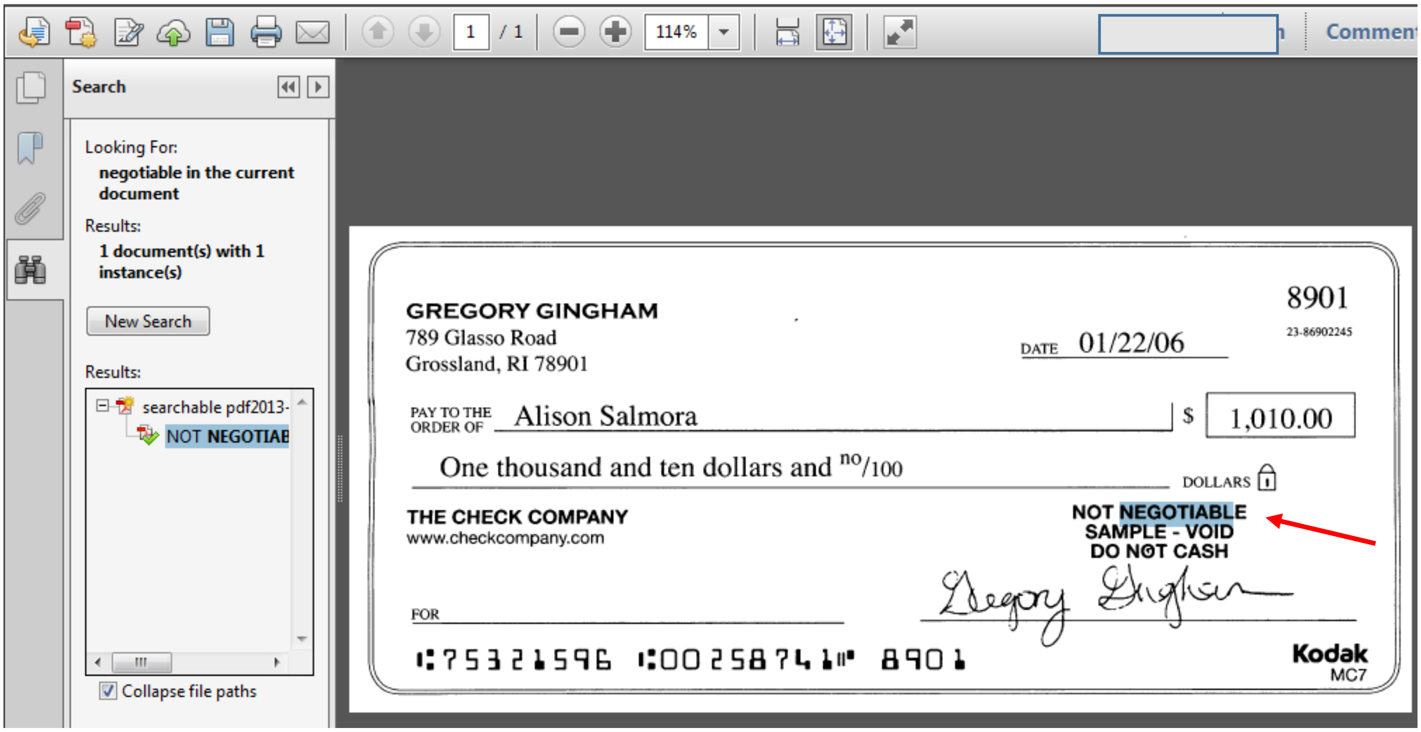
1 - Navigate to the home page and type in the word "negotiable" in the search box on the home page and then select the magnifying glass as shown below.



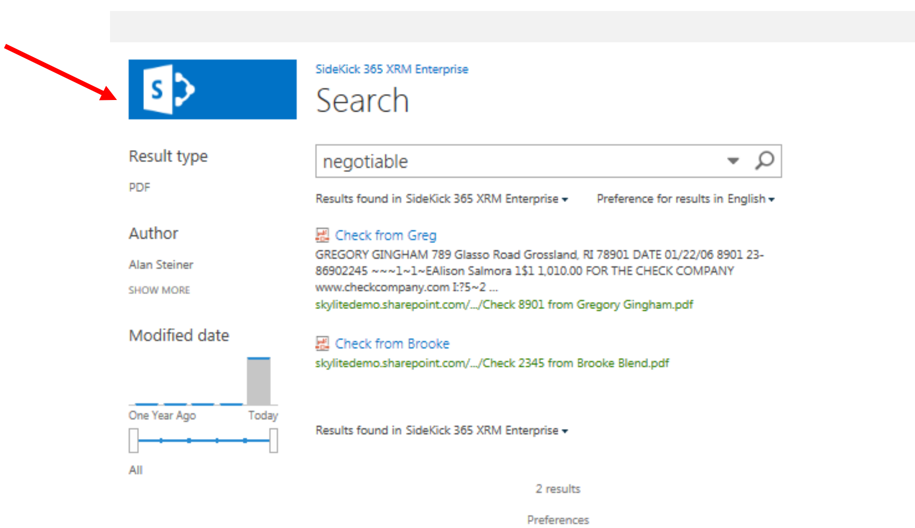
2 – You will see that there are two results as shown below. Go ahead and double click on the name of one of the items and you will then see an image of the scanned check.



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

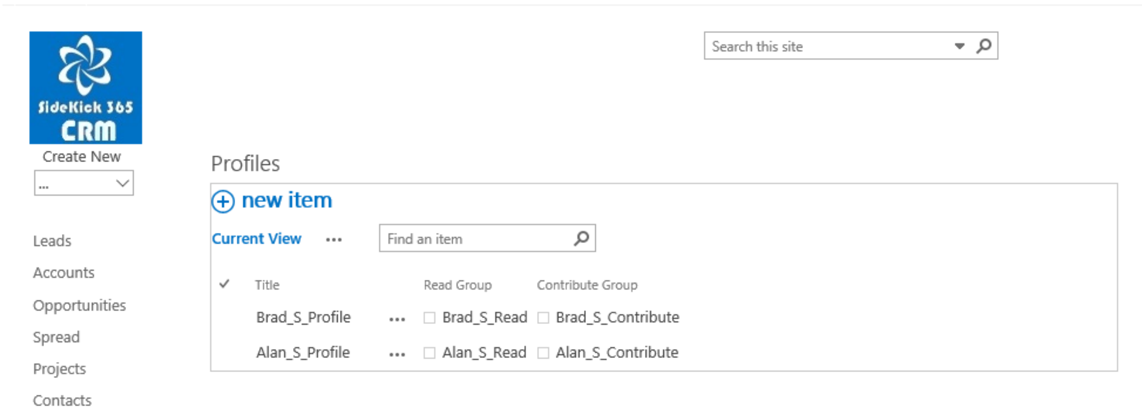
SideKick 365 CRM lets you decide "who" can read or edit an Account, Opportunity, or Contact by associating a security role with of these items. This part of the guide will show you how Security is used and how to set it up. Let's get started.

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.

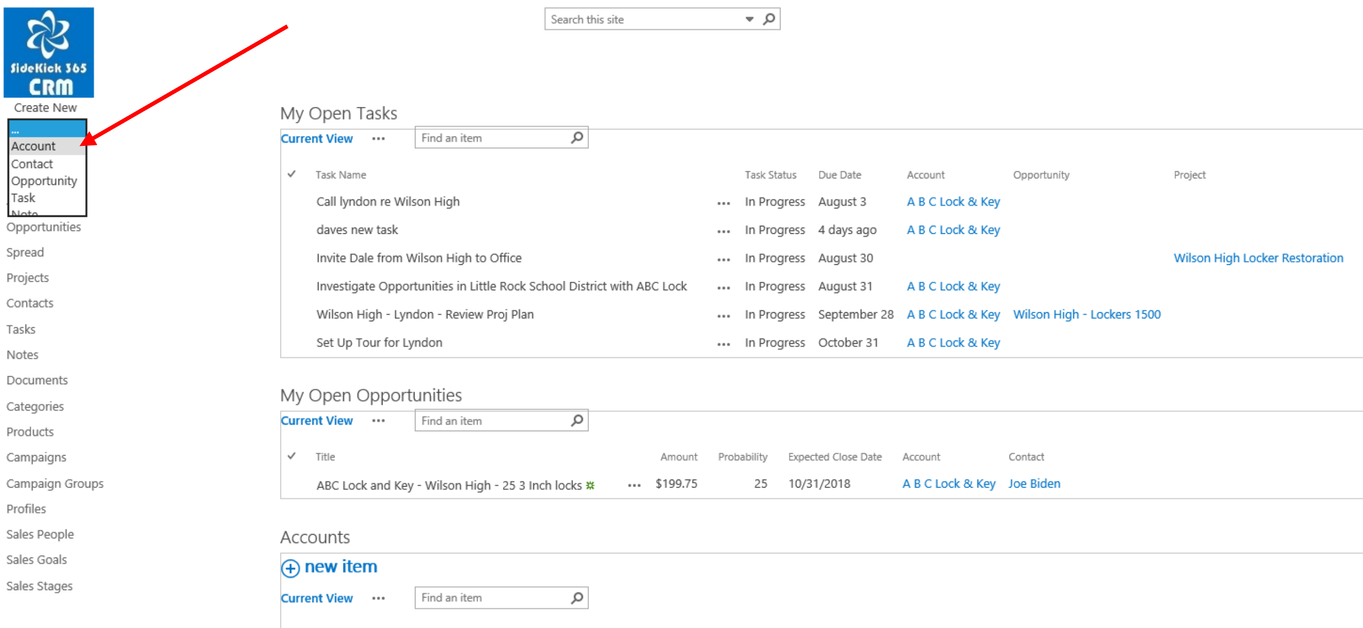


Using a Security Profile

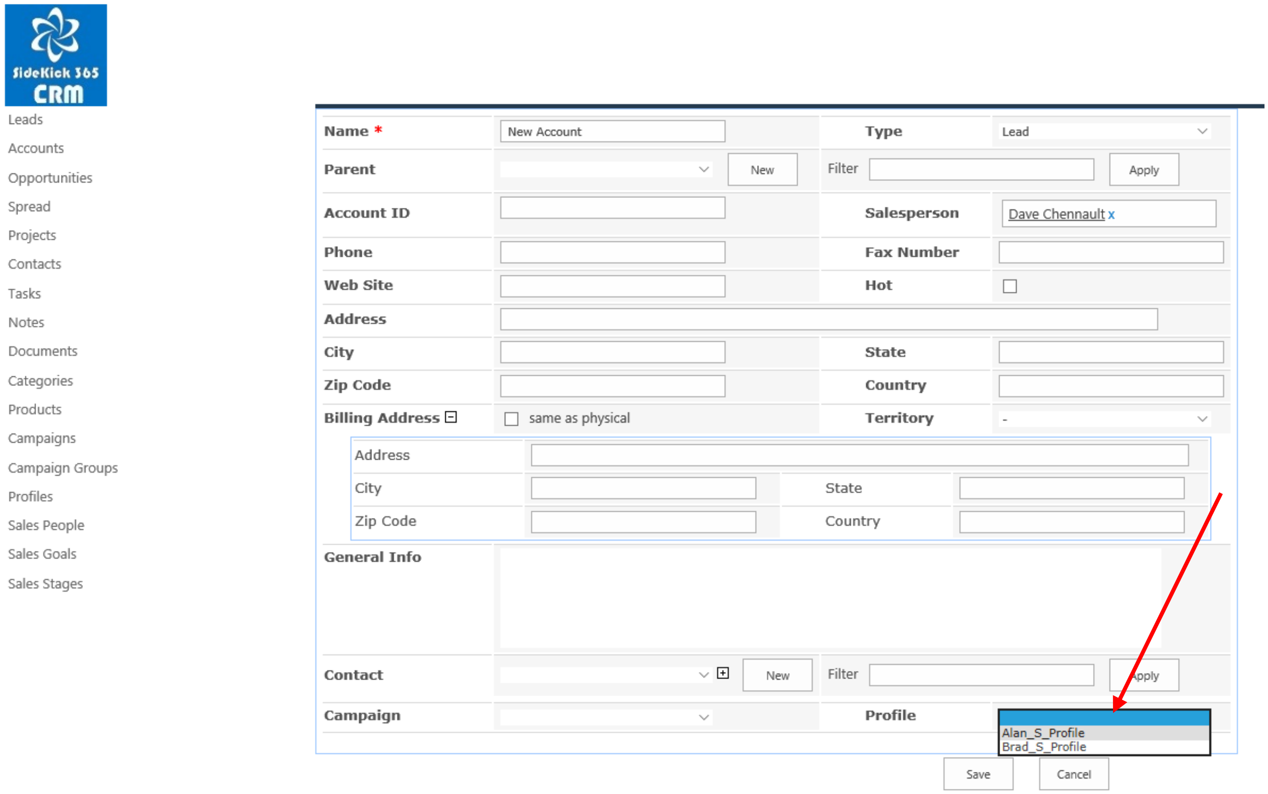
Security profiles are a great way to limit the amount of information presented to a user and also keep them focused on their work. Security profiles also limit what is returned in search results. It is easy to use Security profiles to limit "who" can see "what" - let's get started

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



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.

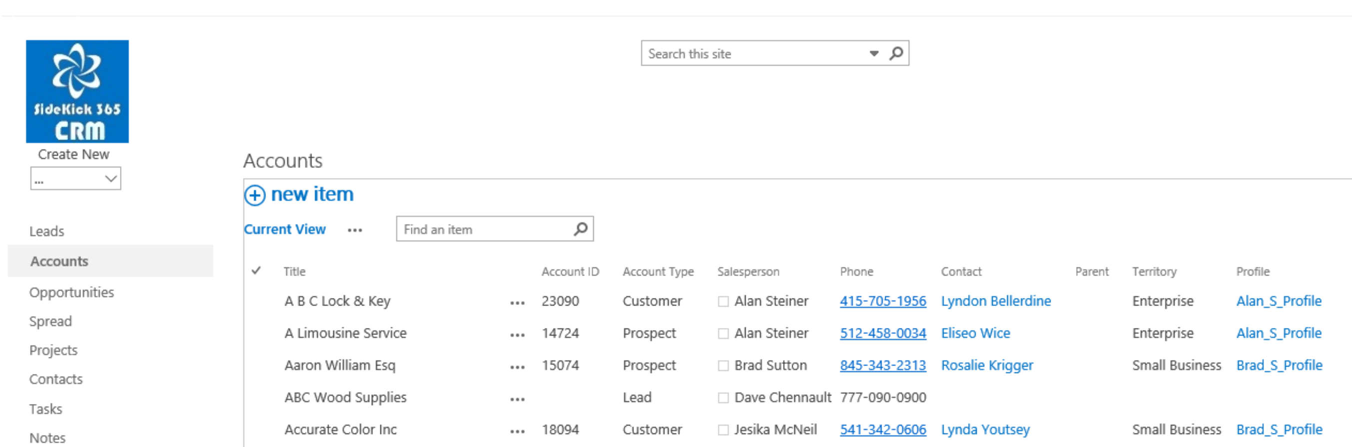


Once a profile is selected and the Account is saved, then only the users in the Read and Edit groups associated with that security profile will be able to either view or edit that account. All of the related Documents, Tasks, Opportunities, and Notes also share the same security profile.

Security Profiles in Action

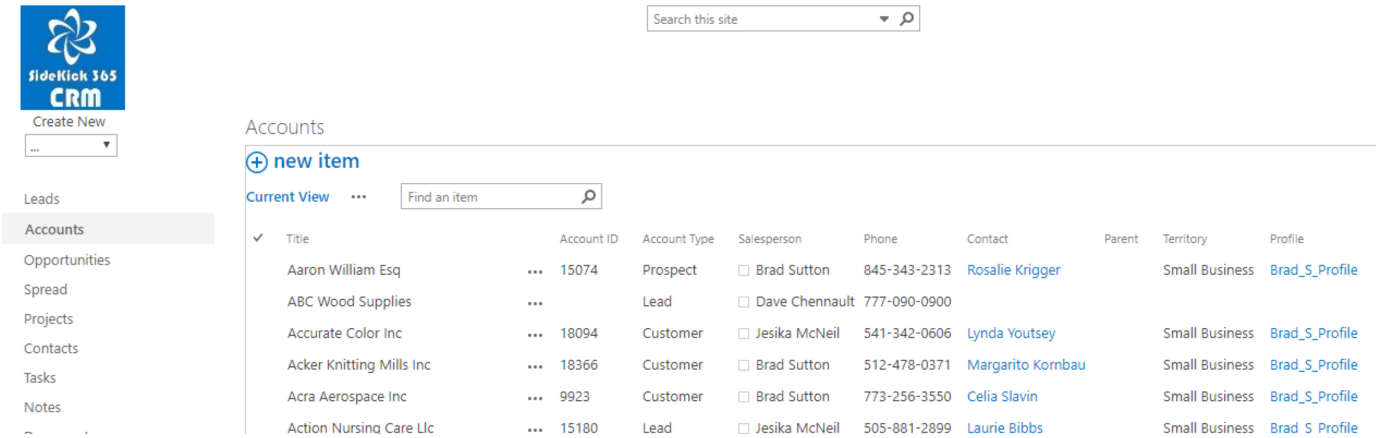
Let's see how Security profiles work.

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:



Now log out and close your browser.

Next log in as DEMO USER 2 THAT WE SEND YOU and use the same password “$ideKick1” 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:



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.

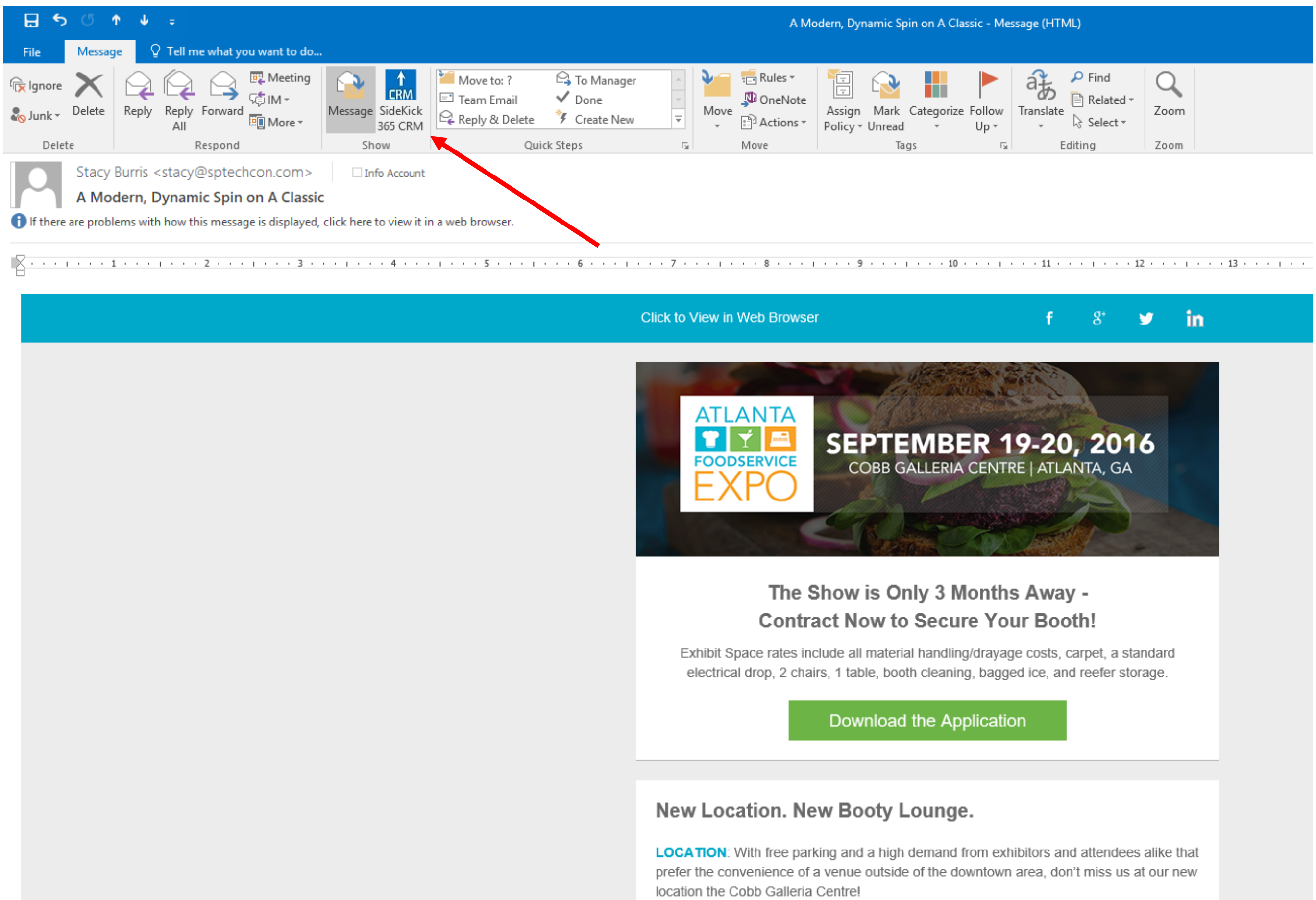
Section 2 - SideKick 365 CRM Office Add-ins

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....

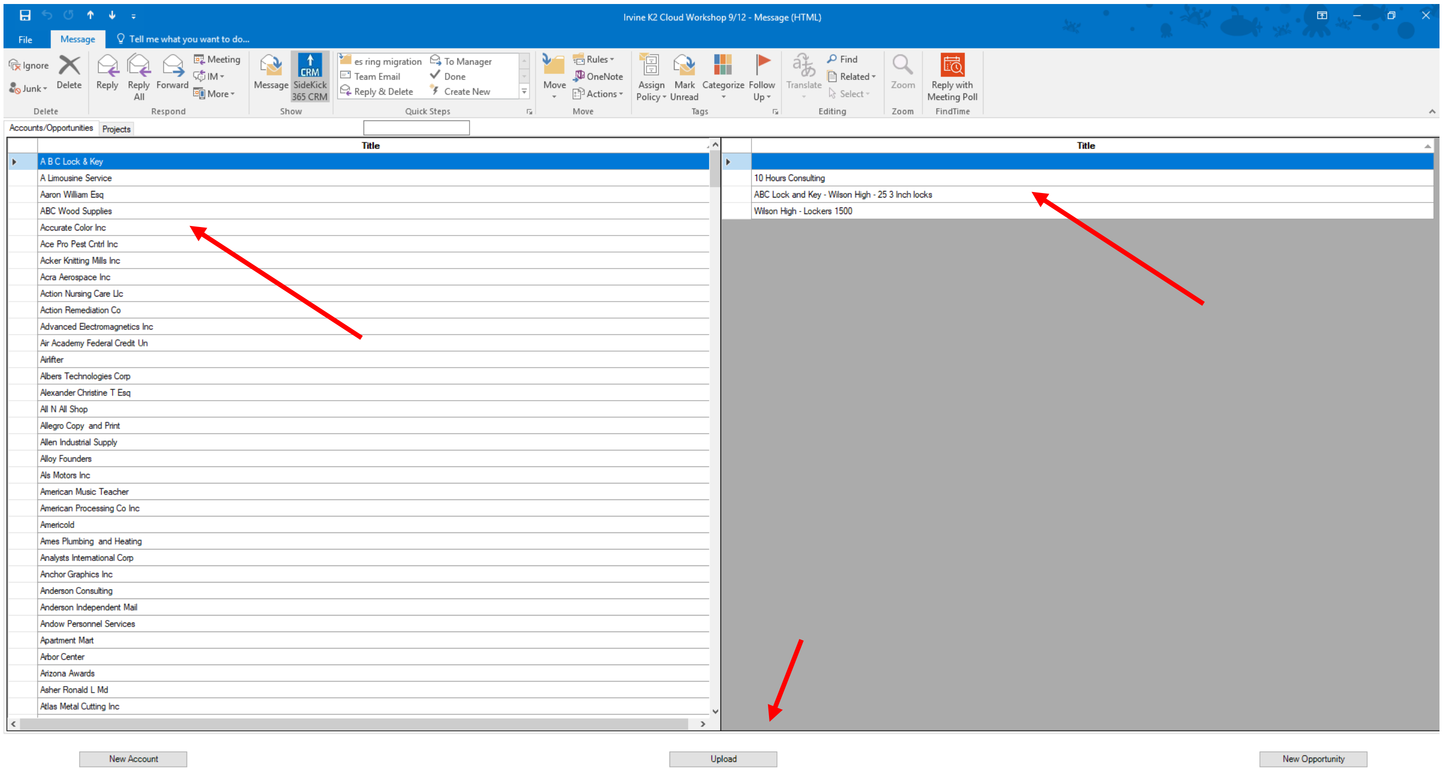
Using the Outlook Add-In for SideKick 365 CRM

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.



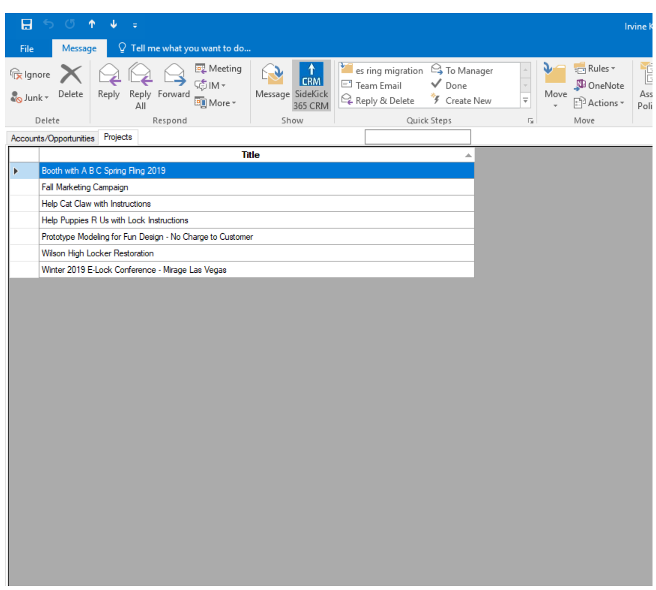
When the user selects the Icon, they are presenetd with a screen that lets then pick the Account, Opportunity, Or project where they want to save a copy as shown below

- 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!

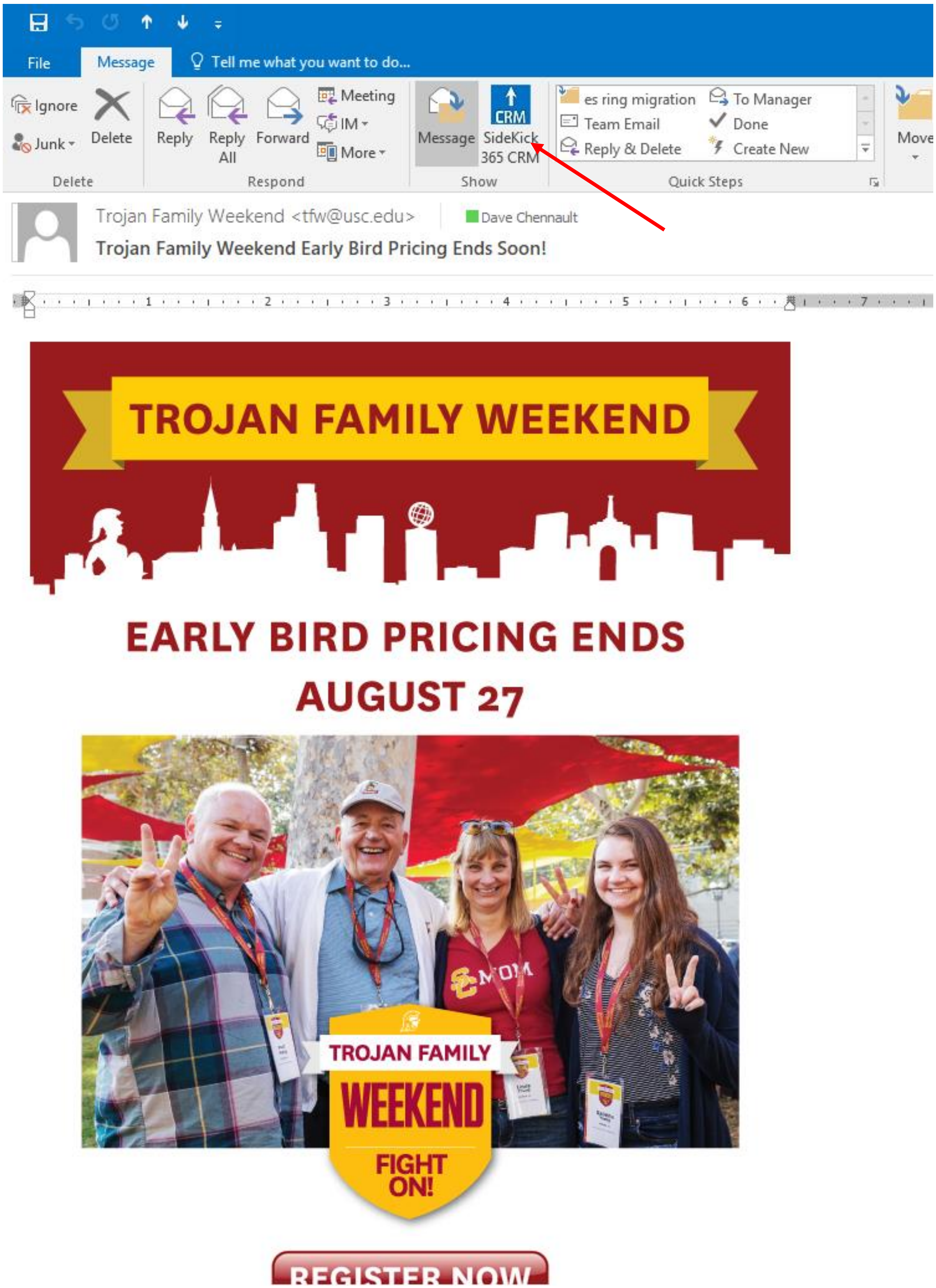
You can also select Projects and save an email, Word, PowerPoint, or Excel file into the Docs associated with a Project as shown below.



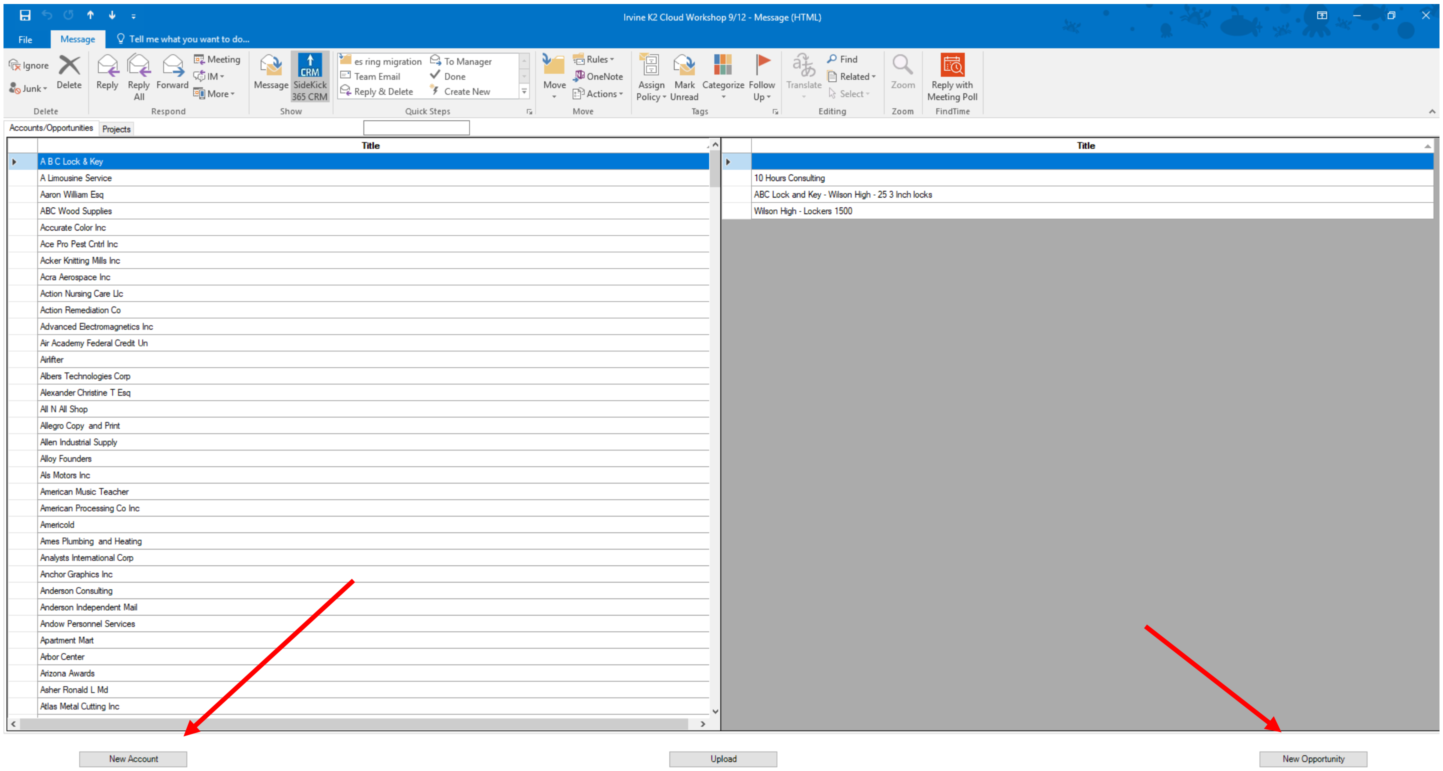
Creating a New Account, Opportunity, Or Project

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...

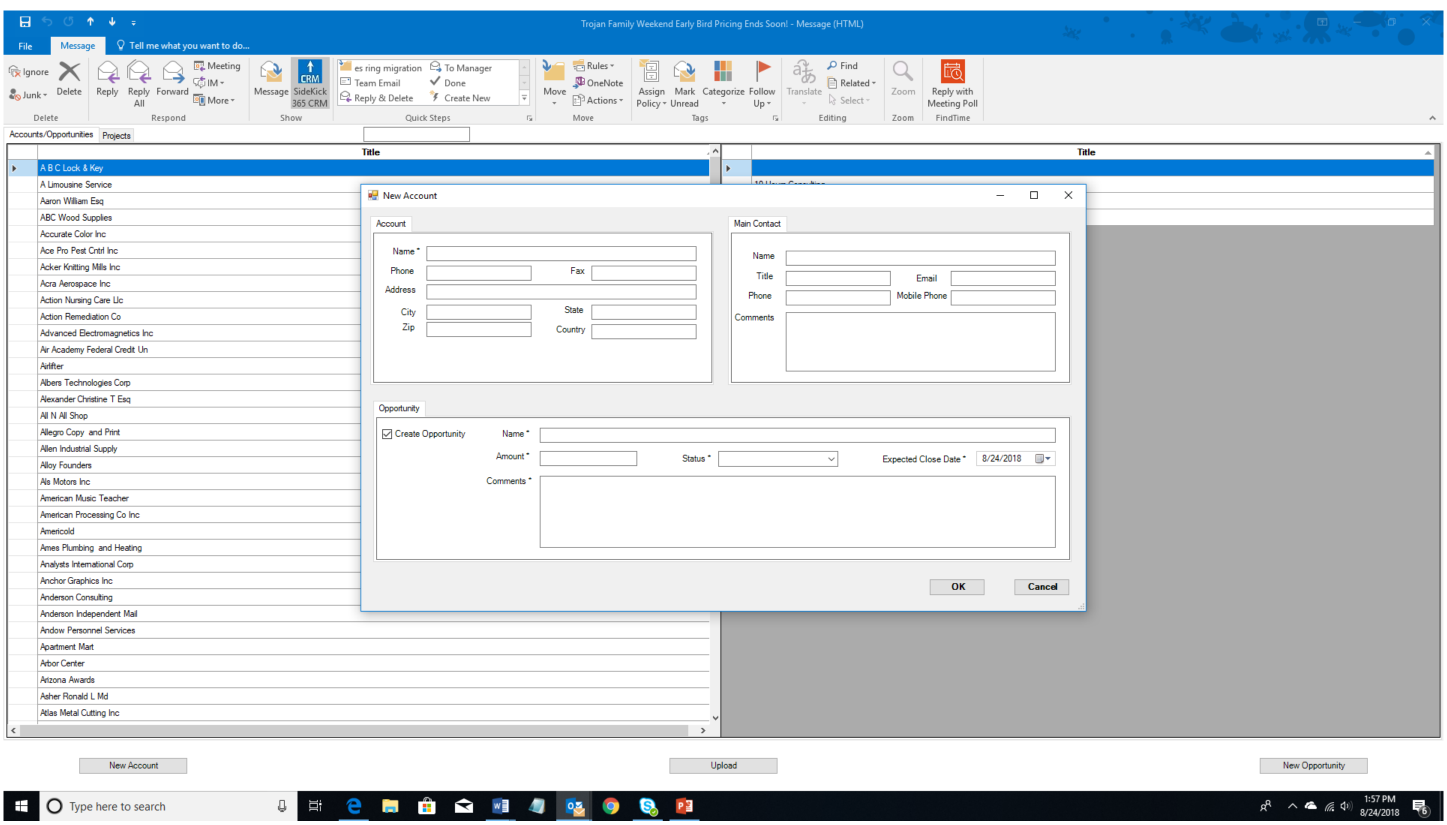
Open the Email and select the SideKick 365 CRM Button



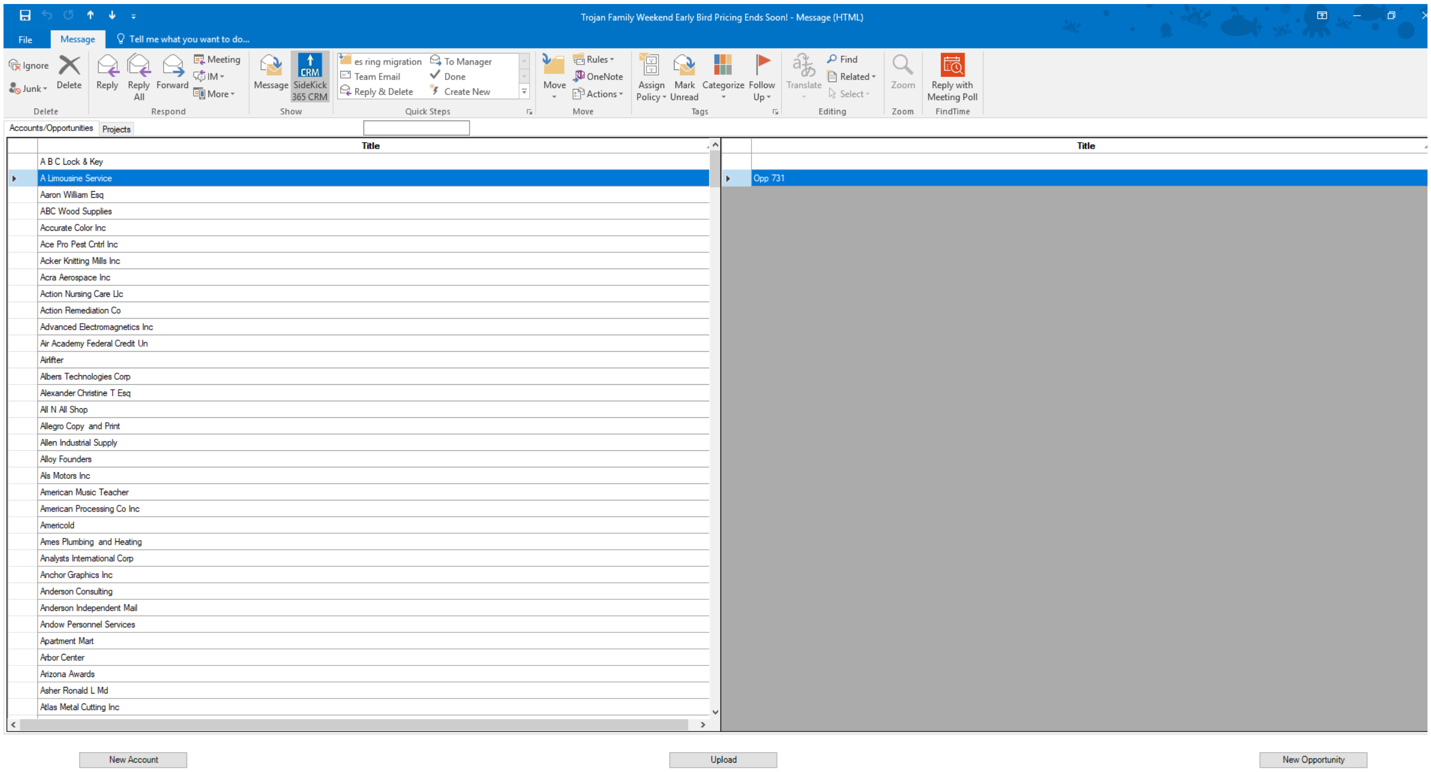
Now Select the New Account, New Opportunity, or New Project Button.



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 then to you and you can install and configure then 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 <u>does not</u> 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 <u>does</u> 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!

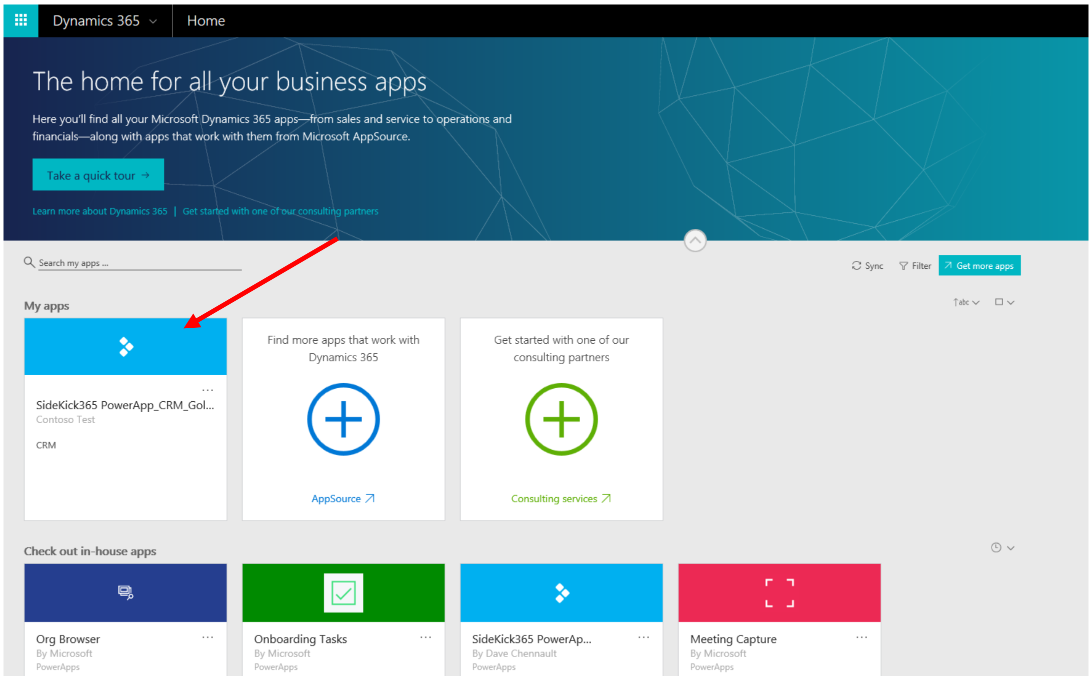
Now that you understand the purpose of SideKick 365 CRM, let's log in and take a look.

Logging In

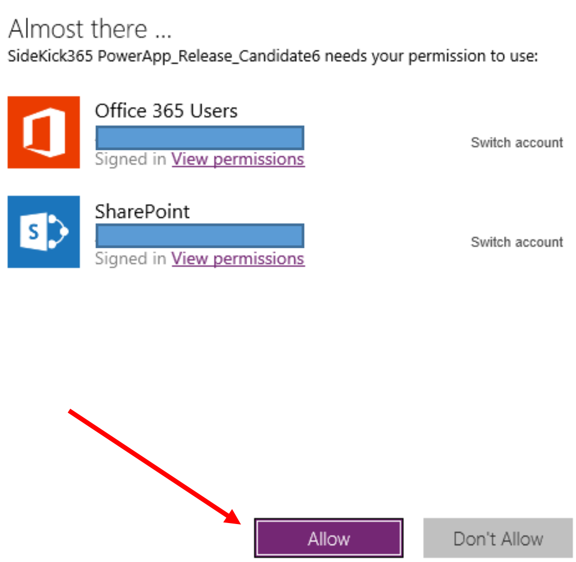
1. Copy this web address in your browser
   a. https://home.dynamics.com
2. When you see the log-in screen, type in
   a. user name: DEMO USER 1 THAT WE SEND YOU
   b. password: DEMO USER 1 THAT WE SEND YOU

You will see tiles for apps as shown below.

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

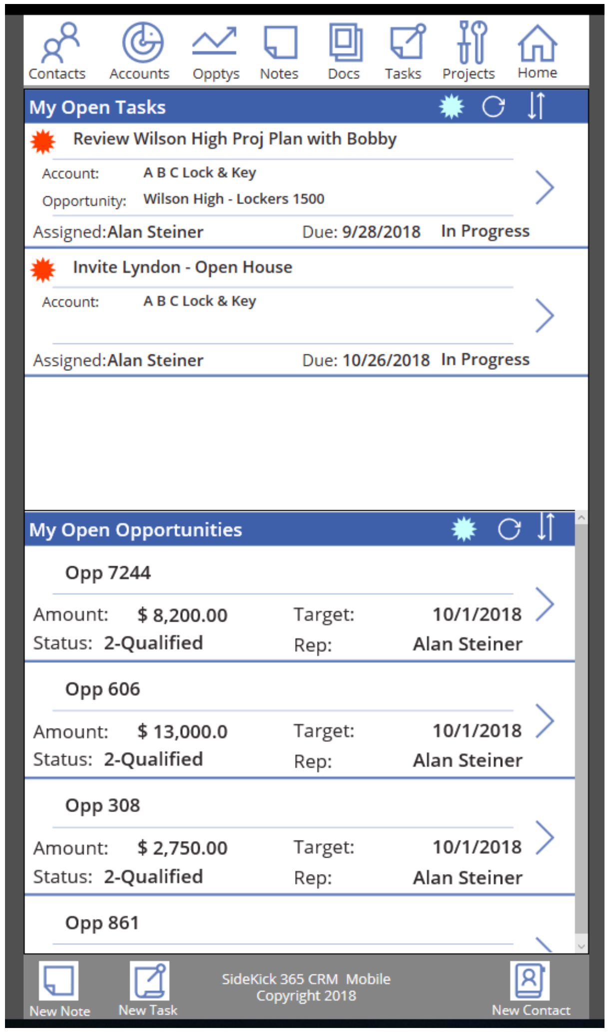


After clicking on the SideKick 365 CRM App tile, you will be asked to log into SharePoint and the Office 365. Go ahead and select the "Allow" button.



SideKick 365 CRM Mobile Home Page

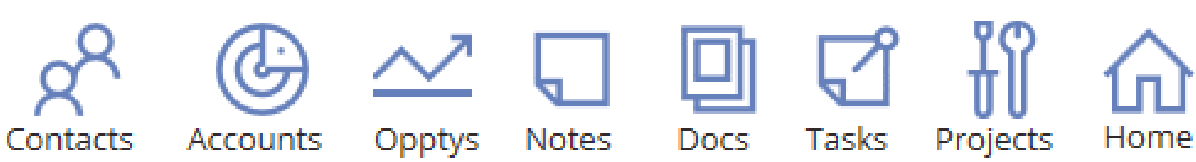
After a moment, you will be taken to the home page of SideKick 365 CRM Mobile – our PowerApp version of SideKick 365 CRM as shown below.



Let's dig in a bit...

Navigation

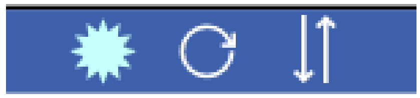
The top of the screen has the core navigation buttons used through the app. Selecting any of these buttons will take you to a list of items associated with that module.



Task and Opportunity Lists

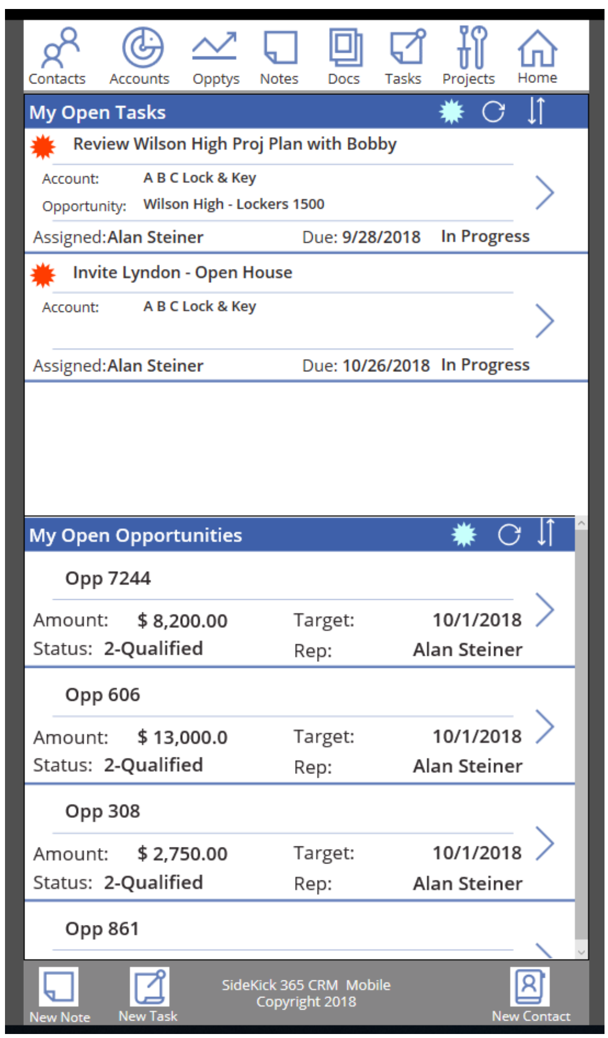
A list of Tasks assigned to Alan Steiner and Opportunities associated with Alan Steiner as the Sales Rep appear in two lists on the home page. The tasks and Opportunities shown on the home page are filtered to show you only the Open Tasks and Open Opportunities that you are assigned to.

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!

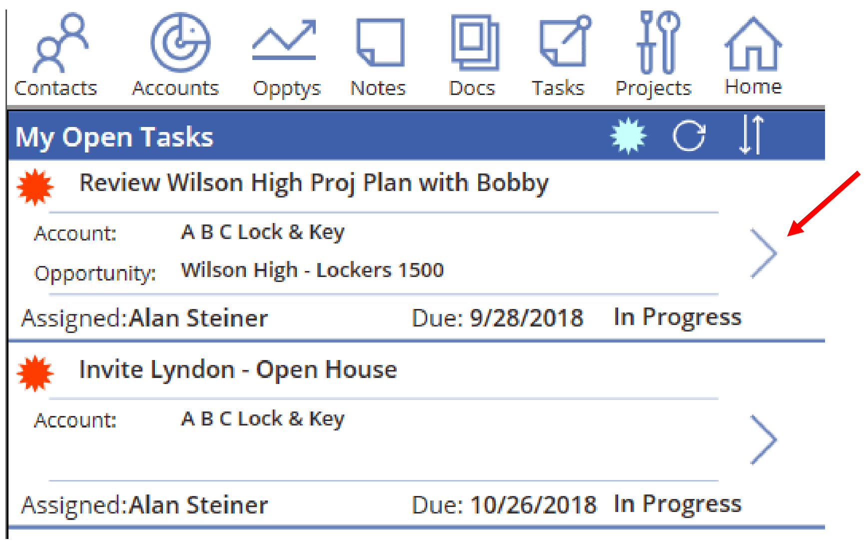


Do you see the buttons at the bottom of the page? These are shortcuts to add a new Note, Task, or Contact. They let you quickly add Notes and Tasks to Accounts, Opportunities or Projects or add a new Contact that can be associated with an Account, Opportunity, or Project.

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.

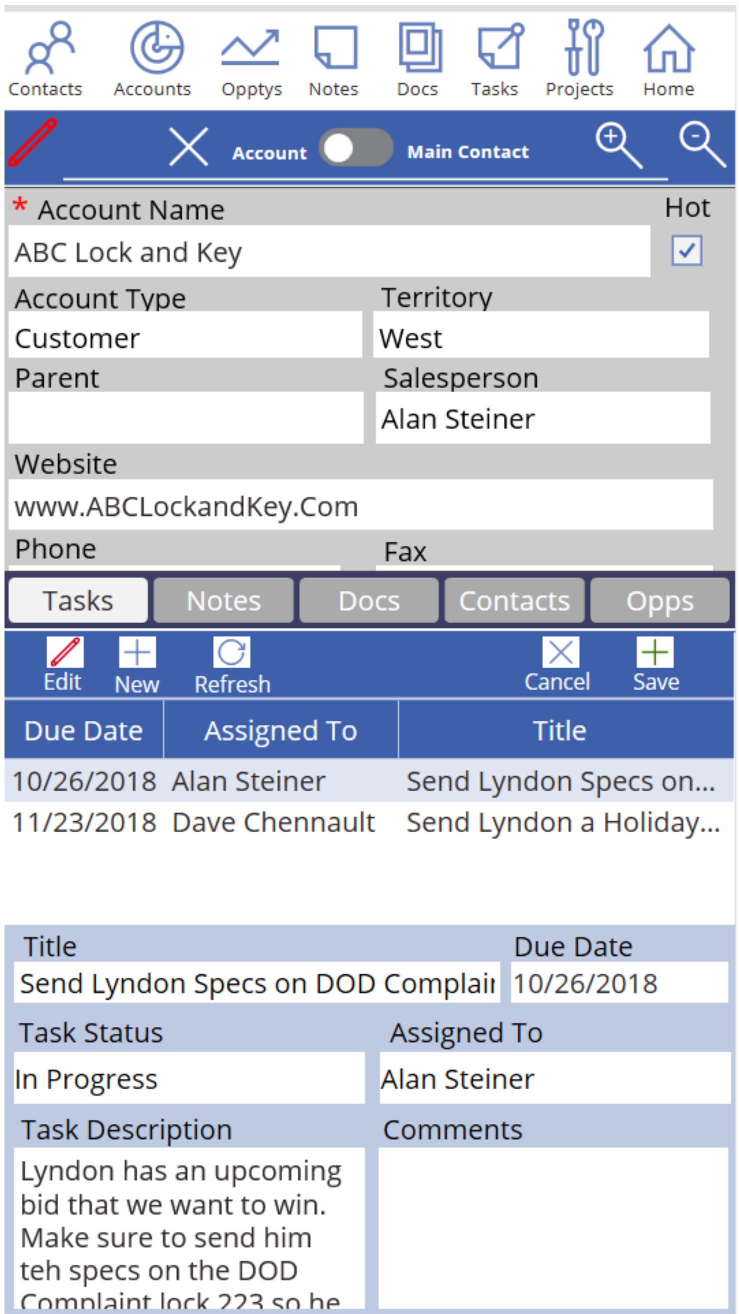
Account Module - SideKick 365 CRM Mobile

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.

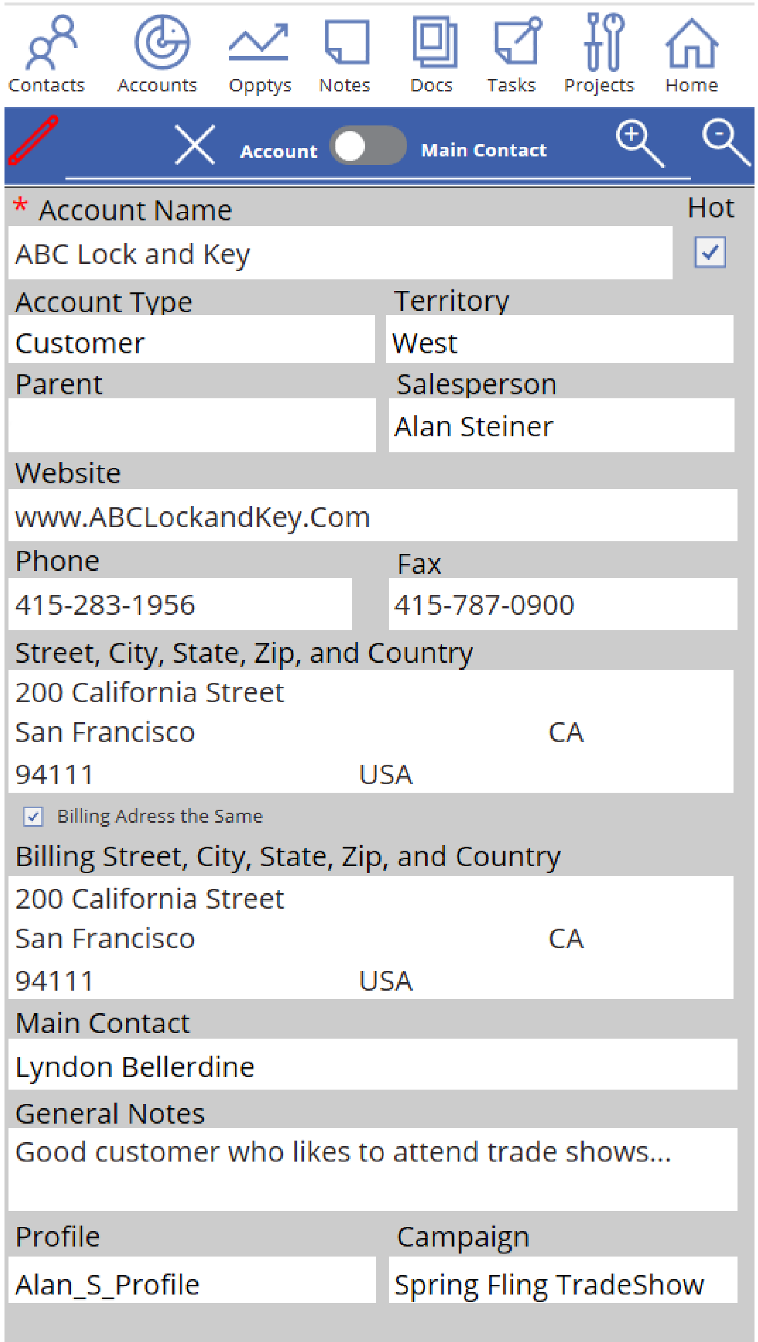
The Account Detail Screen has the basic account information like the account name, territory, salesperson, address and some general notes about the account. Information is shown in a compressed format when you first open the account screen as shown below. You will notice that the top half of the account 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 magnifyig glass wth a "+" in it.   Lets compare the two views.

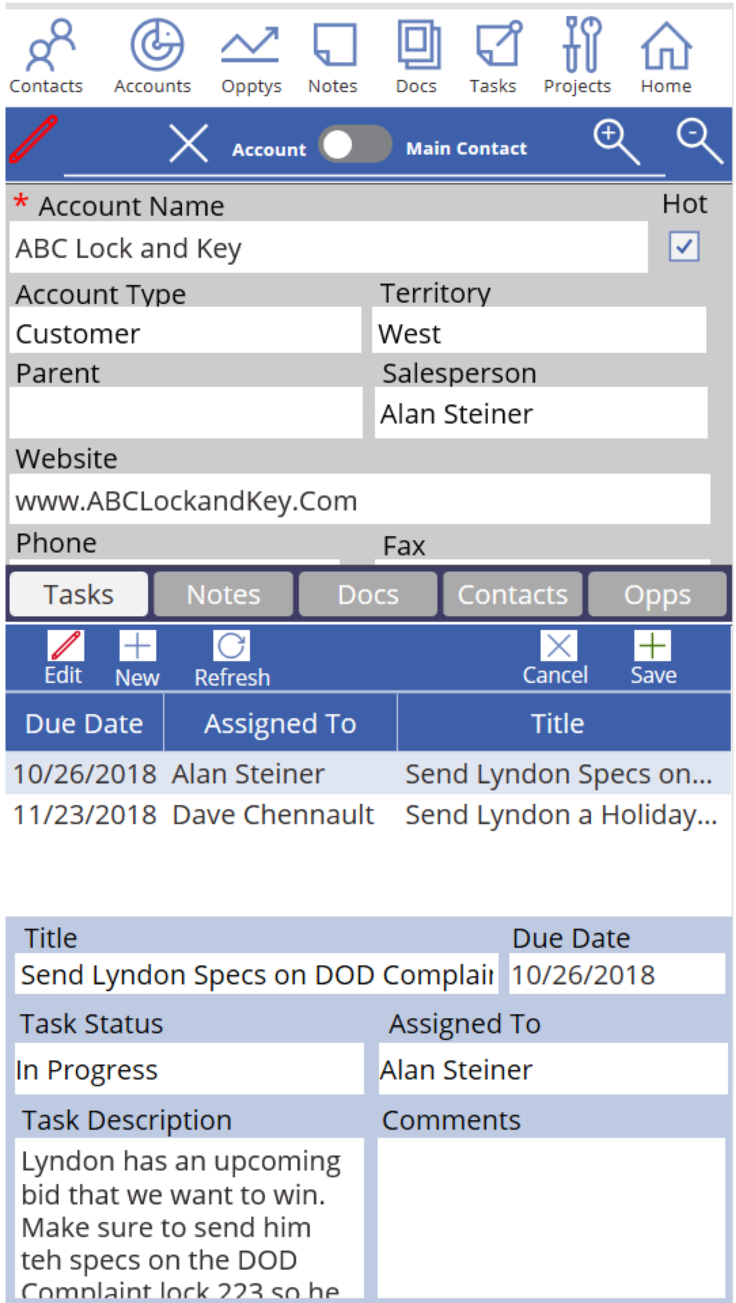
The view below is compressed view



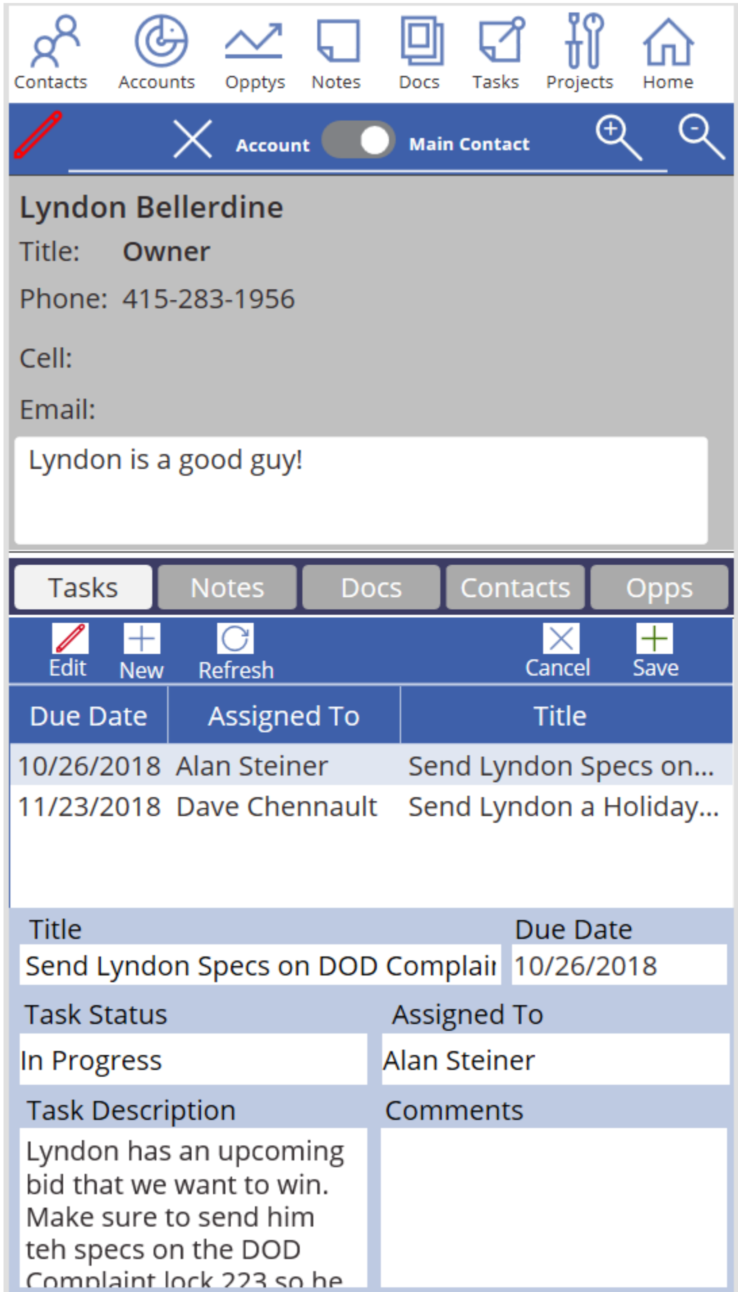
The screenshot below shows the account detail after selecting the magnifying glass with the "+" in it.



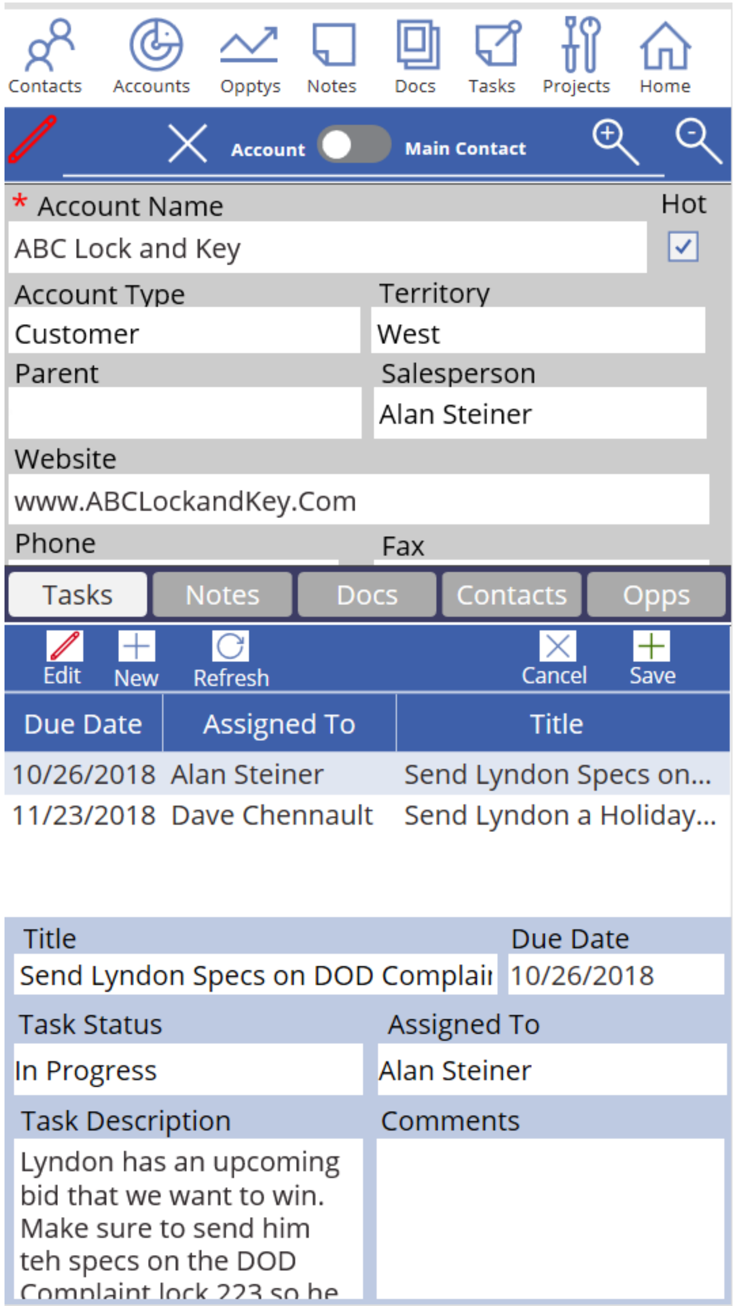
Select the Magnifying glass with the “-“ in it to see the compressed view with that Tabs again



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



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



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 tabs associated with the account. You can add or edit a task using the buttons within the Tasks module.

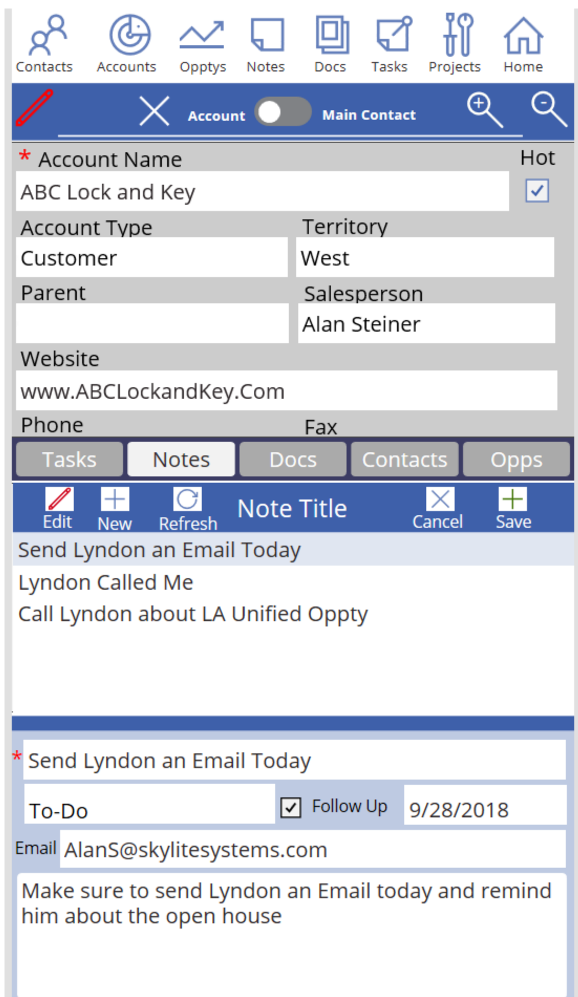
> Tip – When you add a Task within the PowerApp, it may take up to 20 seconds for that new task to appear in the list. The delay is caused because a workflow is running the apply permissions to the task so only users with proper permissions will be able to see the Task. The permission applied to the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

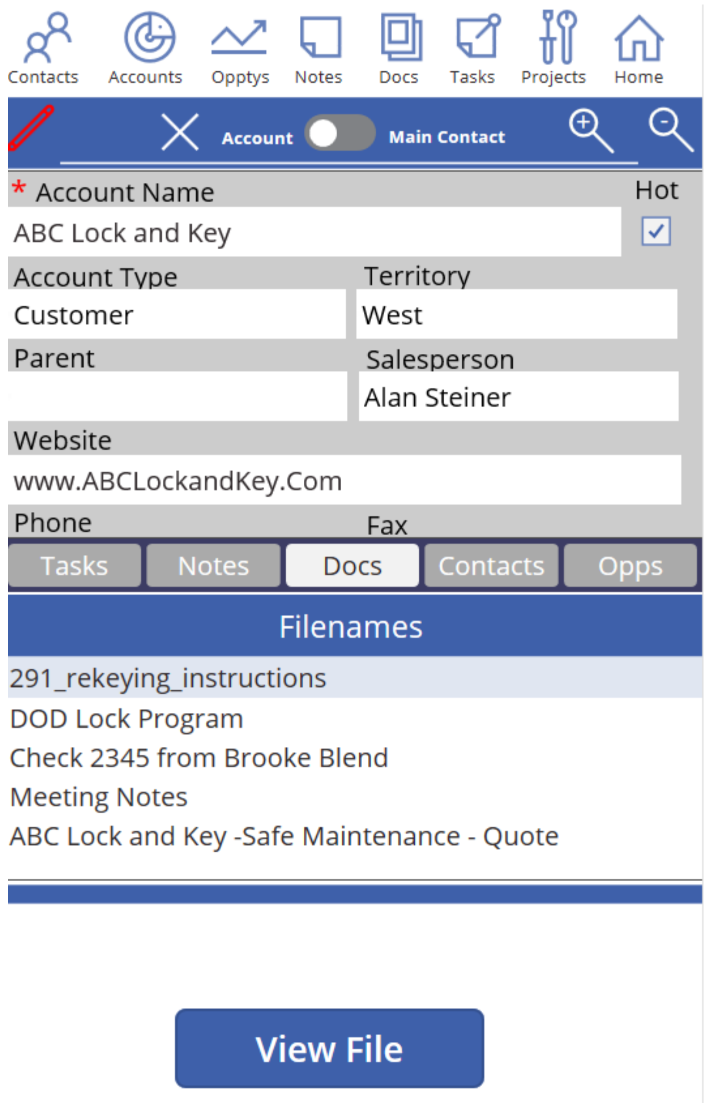
Tip – Notes have a useful reminder capability. The person with the email address in the note will get a reminder email with a link to this Note if you select the "Follow Up" Checkbox and put in a Date and Email. The Date field is the date that the email will be sent to the user named in the Email field.

You and 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.



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.

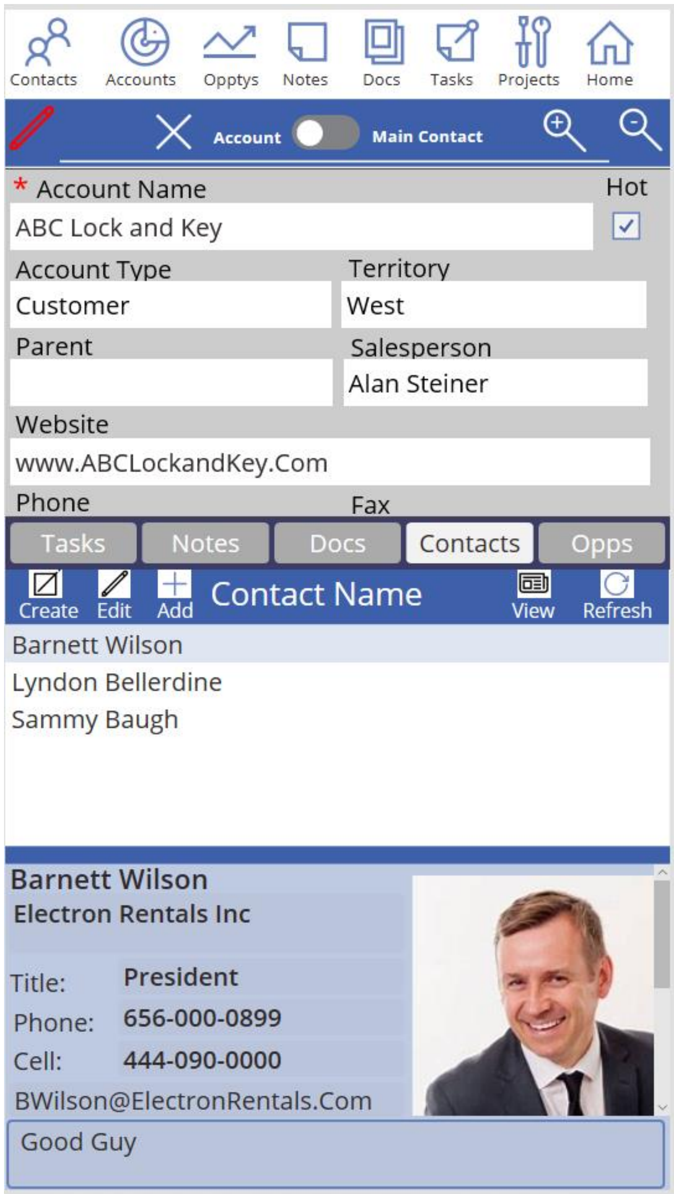


Contacts

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.

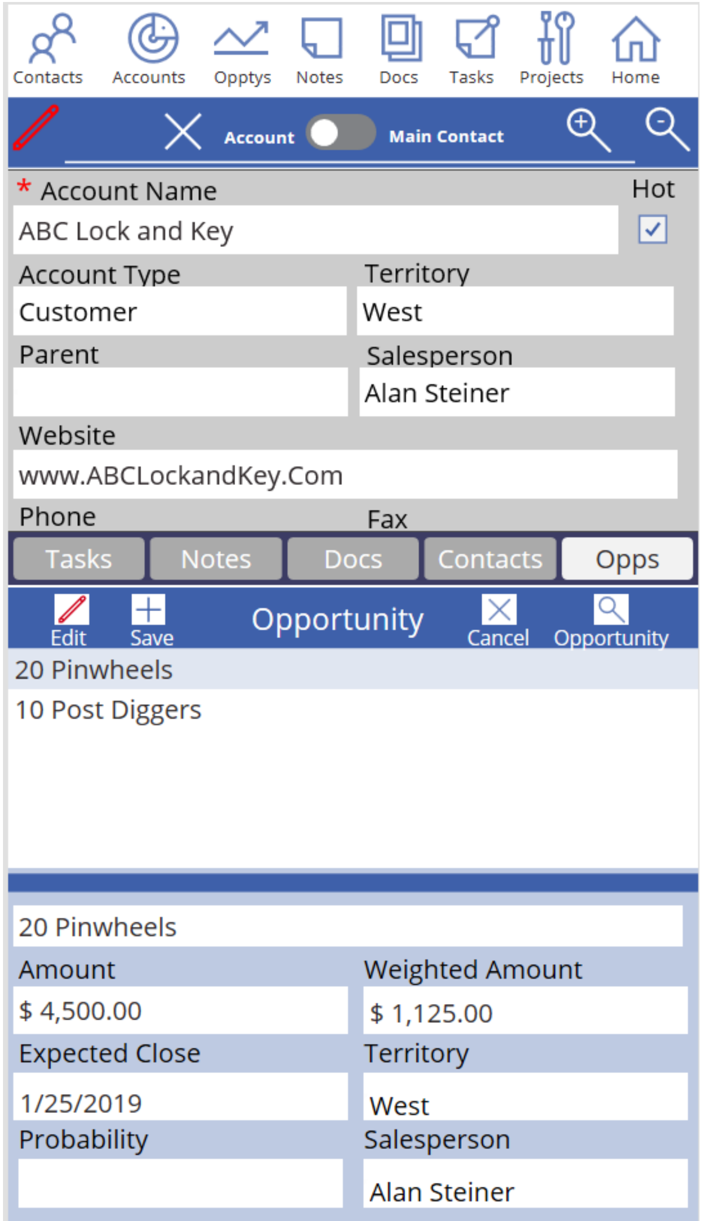
You can also see the a full page listing of accounts by selecting the "View Button"

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.

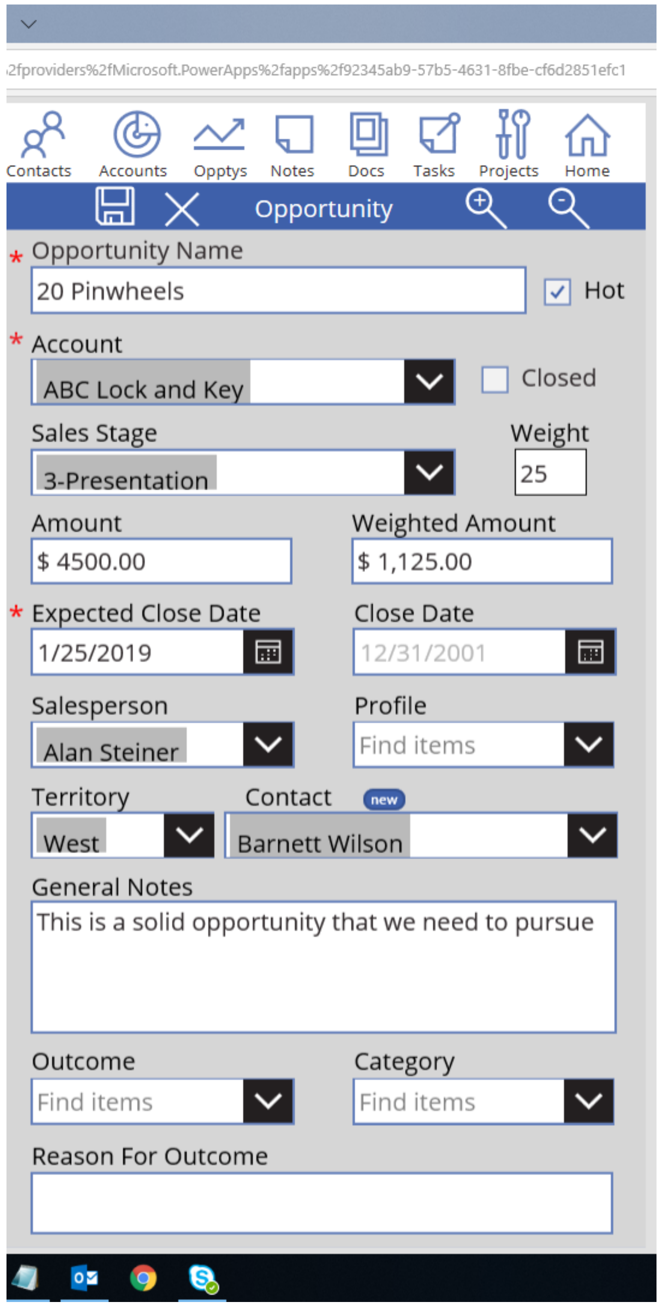


Opportunities Module

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 fil out all required fields. A Required field has a red star beside the title as shown below

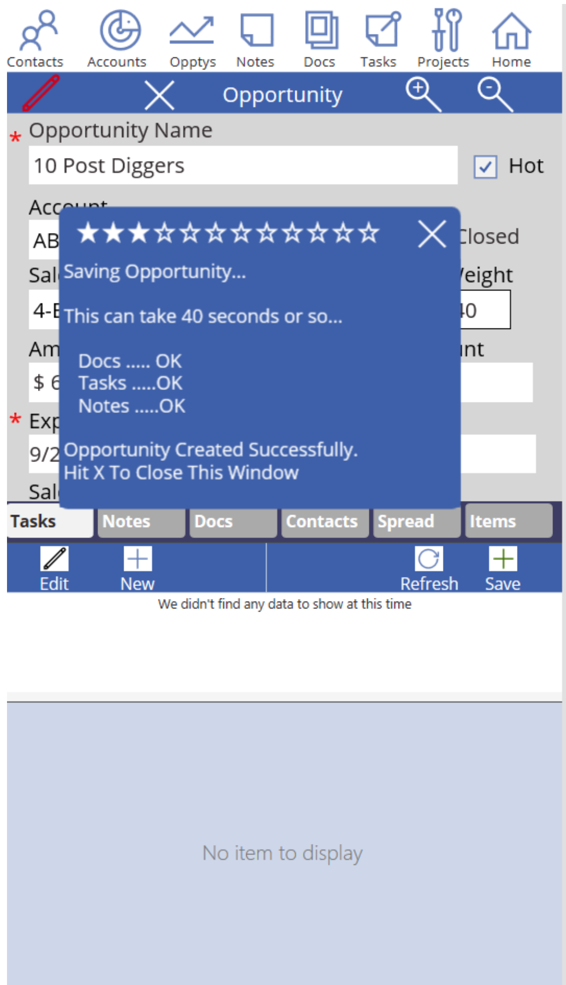


Saving a new Opportunity

SideKick 365 CRM is a sophisticated app. When you save a new Opportunity, a workflows 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 bow 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

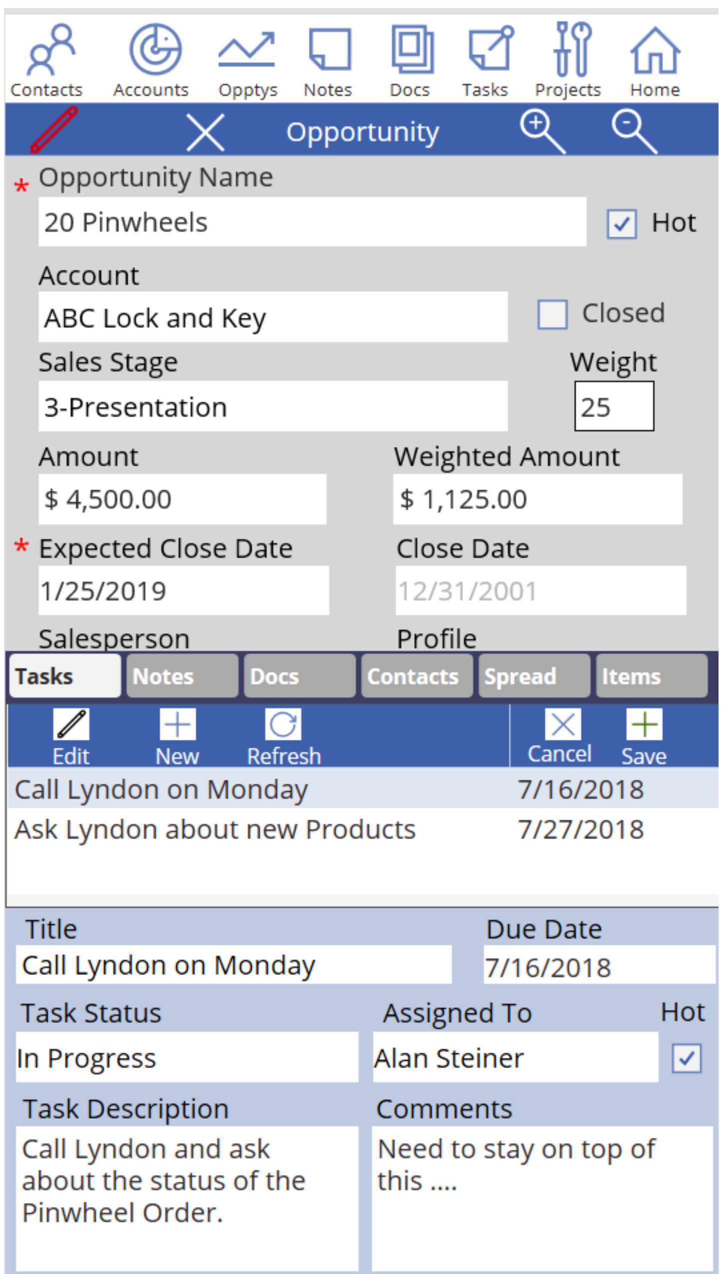
Opportunities have six (6) tabs in the PowerApp. The tabs are used to view items that are related to an opportunity.

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.

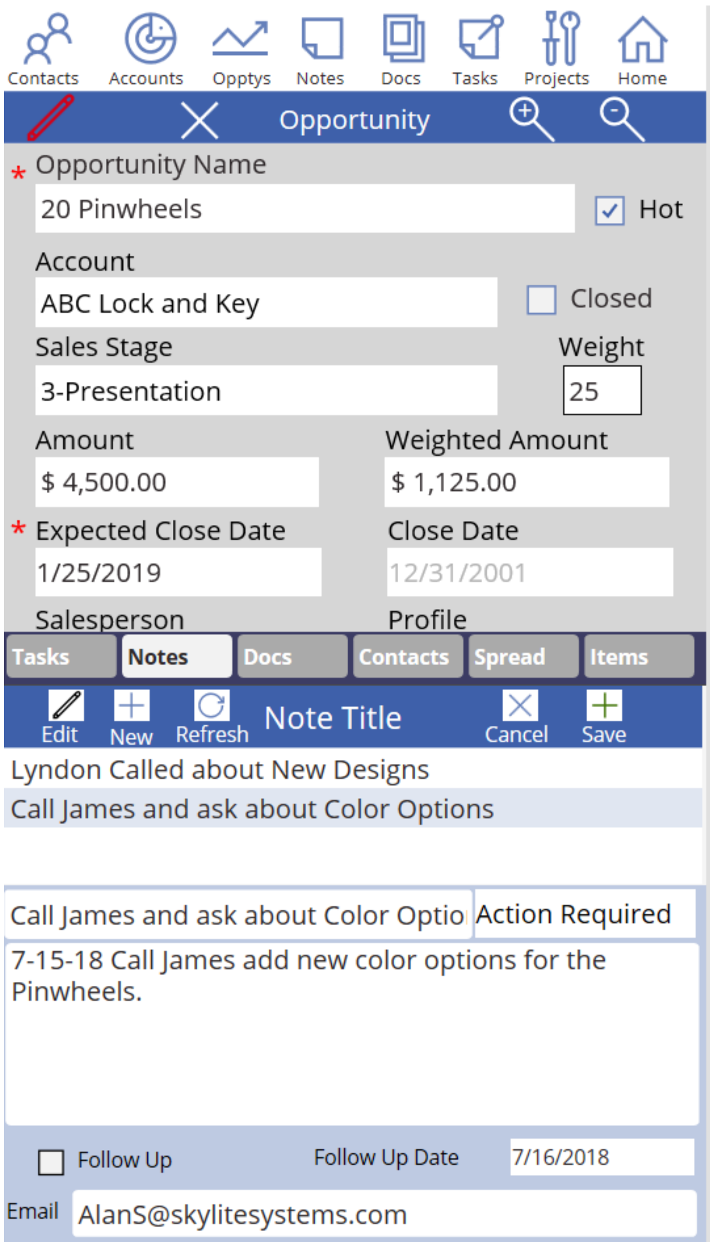


Notes

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.

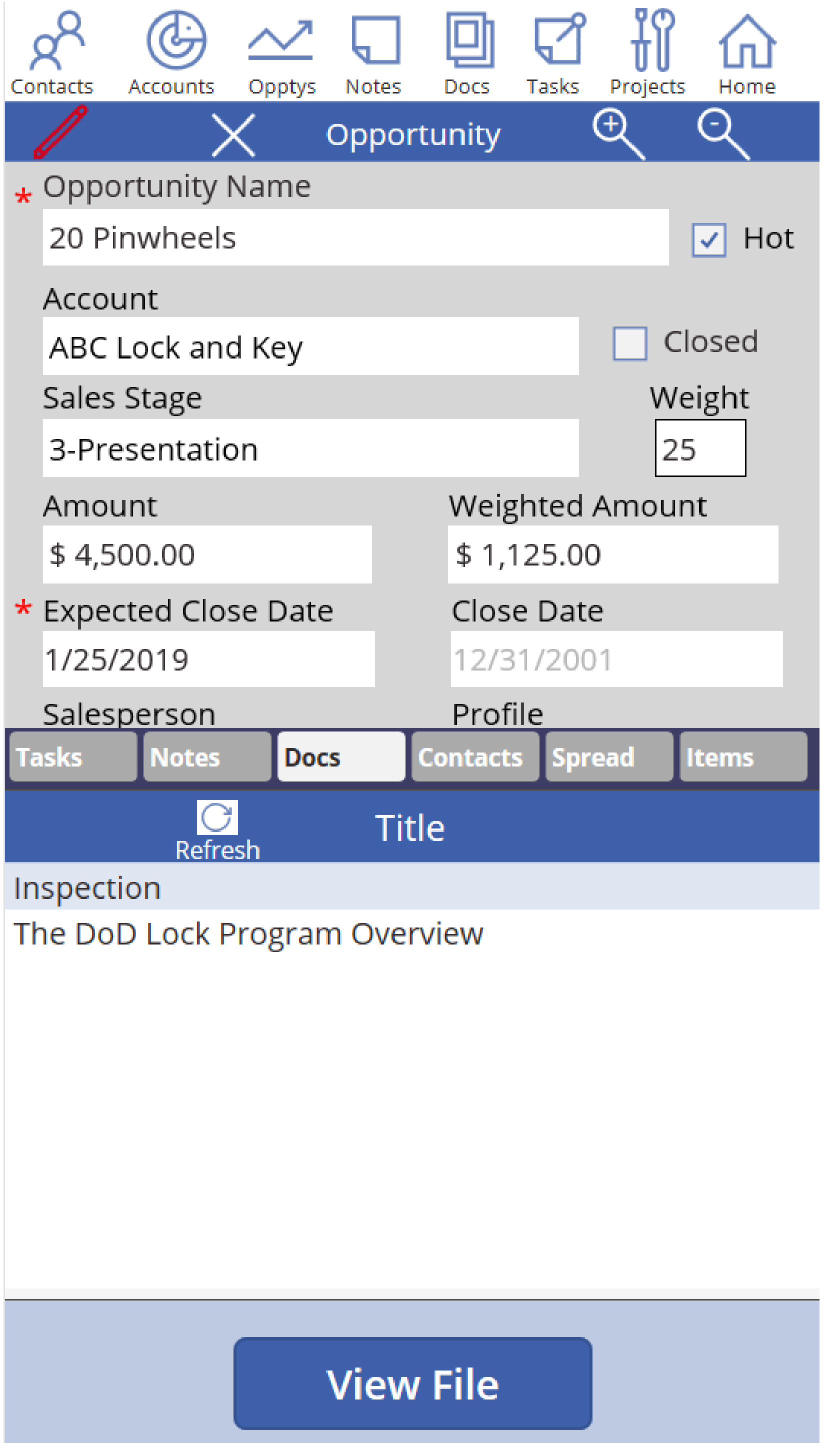
Tip – Notes have a useful reminder capability. The person with the email address in the note will get a reminder email with a link to this Note if you select the "Follow Up" Checkbox and put in a Date and Email. The Date field is the date that the email will be sent to the user named in the Email field.

You and 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.



Docs

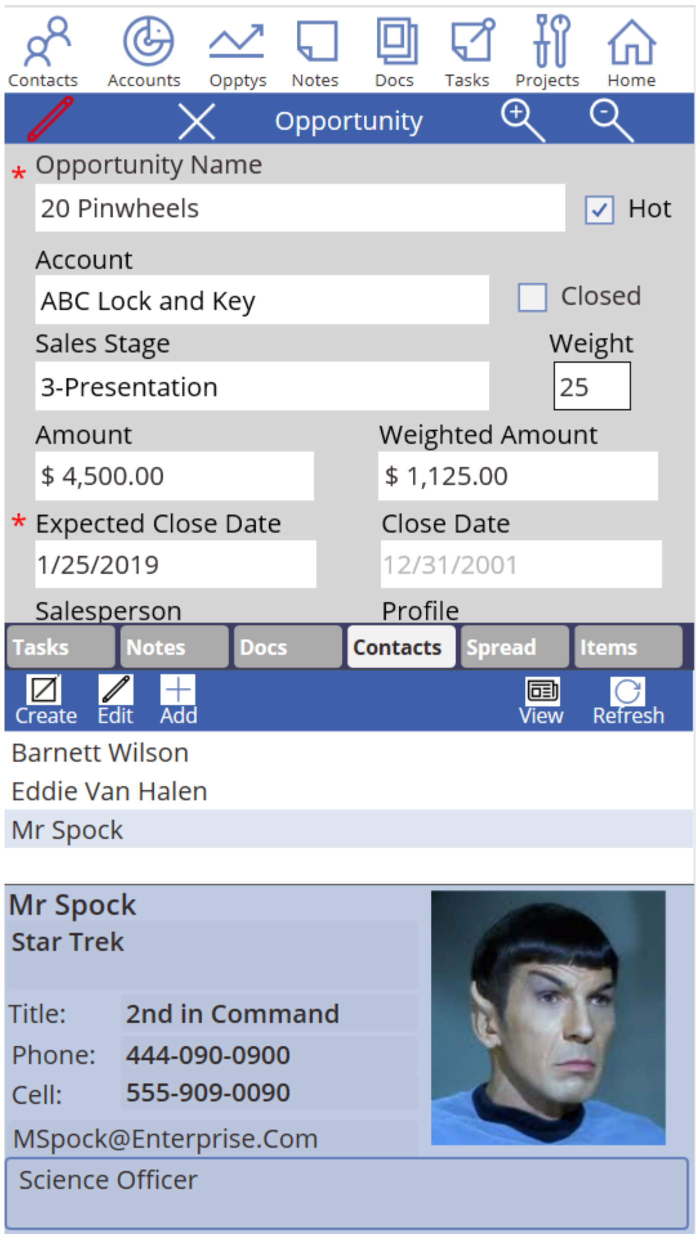
The Docs tab shows documents that are associated with the account. The documents can be viewed by selecting the "View File" button in the window below the list of documents.



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"

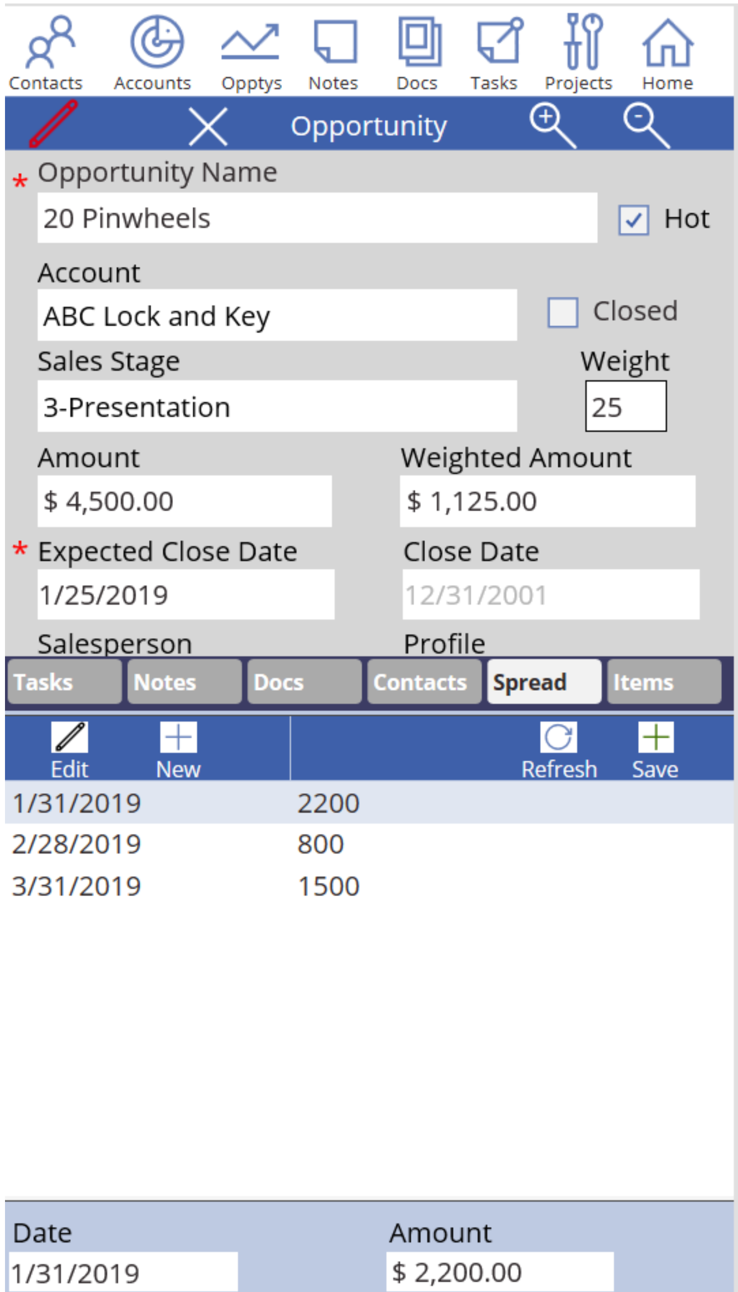


Tip – Adding a new Contact to SideKick 365 CRM is easy. Once you hit save in the new account, it will take about 15 seconds for the new Contact to be associated with the Account. To view the new associated account, wait 15 seconds then hit he Contacts tab and Refresh. The delay is due to a workflow running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

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.

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



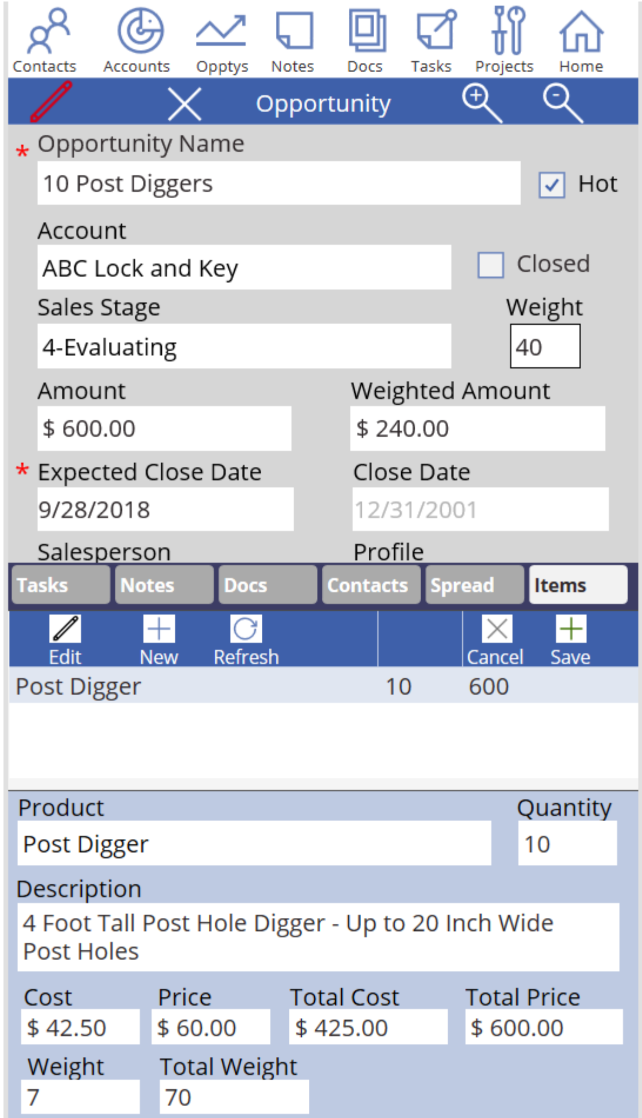
Tip – Spread is optional but if you want to use it then you should spread every opportunity even if that opportunity only has revenue in a single period of time. This will make your reports accurate if you report on the Spread entries.

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.



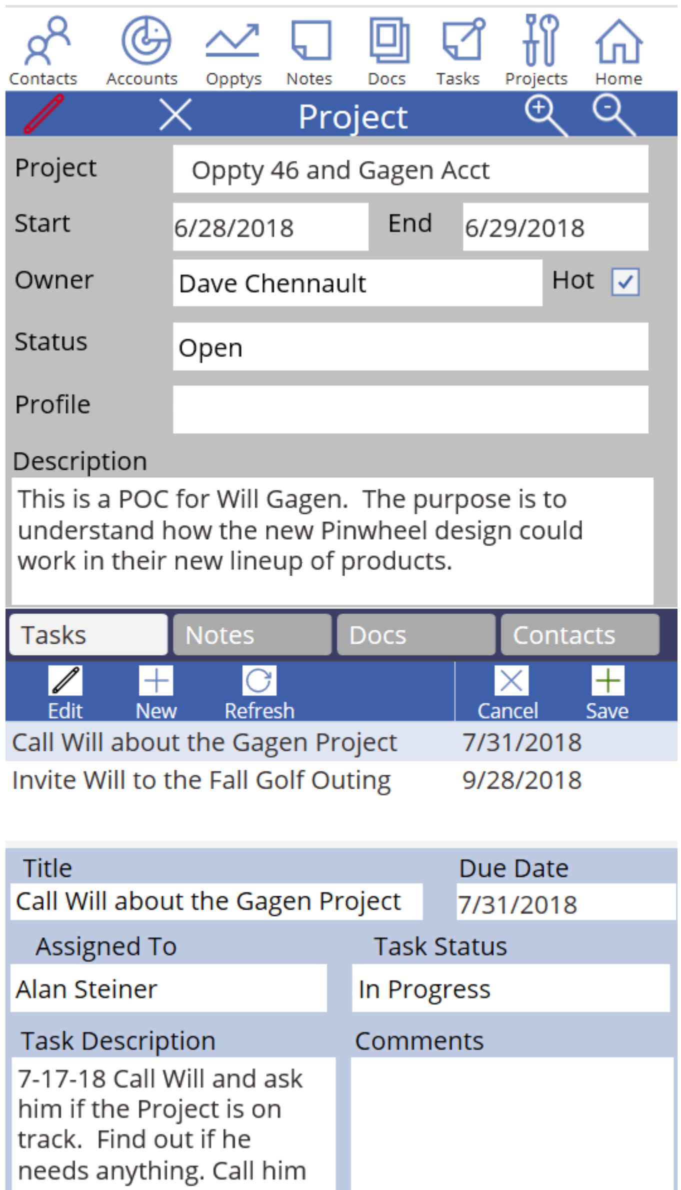
Hint - You can type a few letters or characters in the Product dropdown with the item detail and the choice of Product options will narrow.

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

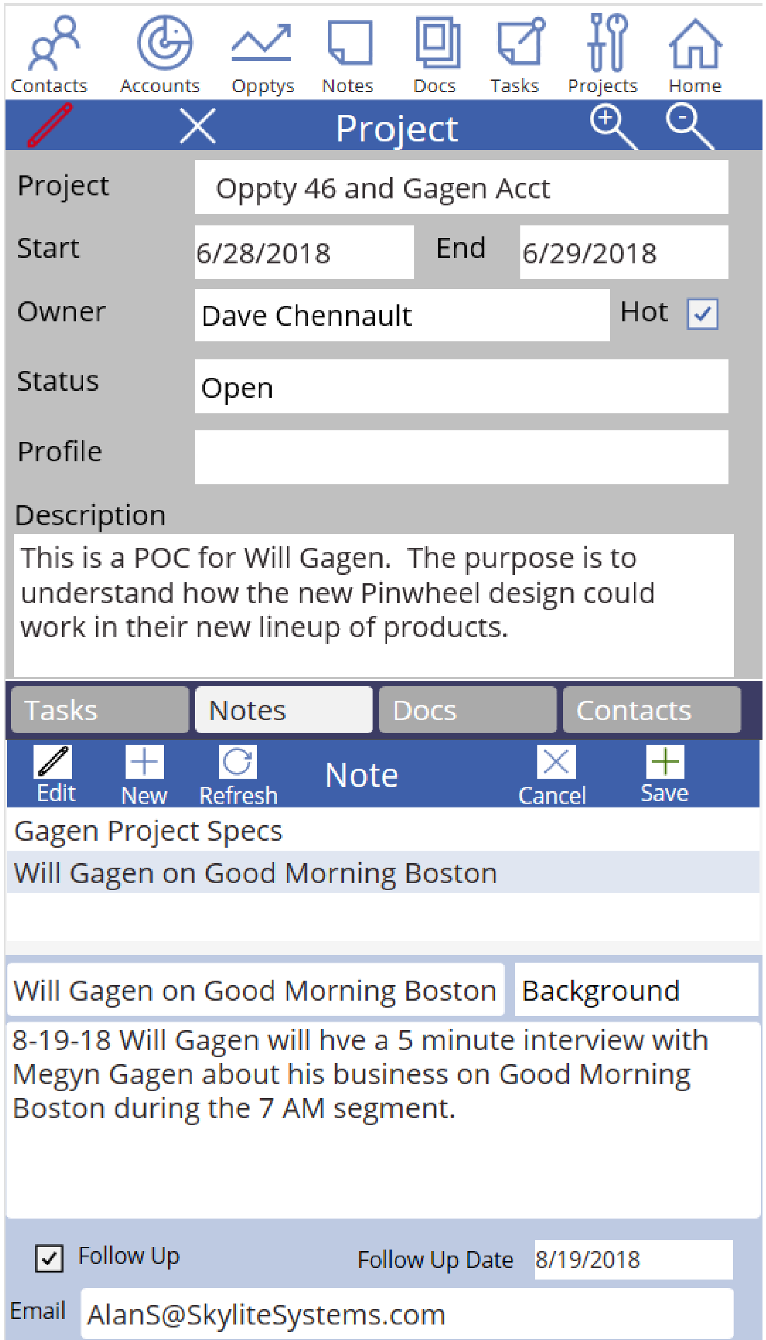
Tasks can be associated with a project. These tasks will show up on the home page if they are open and assigned to you. They will also be available in the Tasks Module. The screenshot below shows tasks associated with a Project.



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

Notes

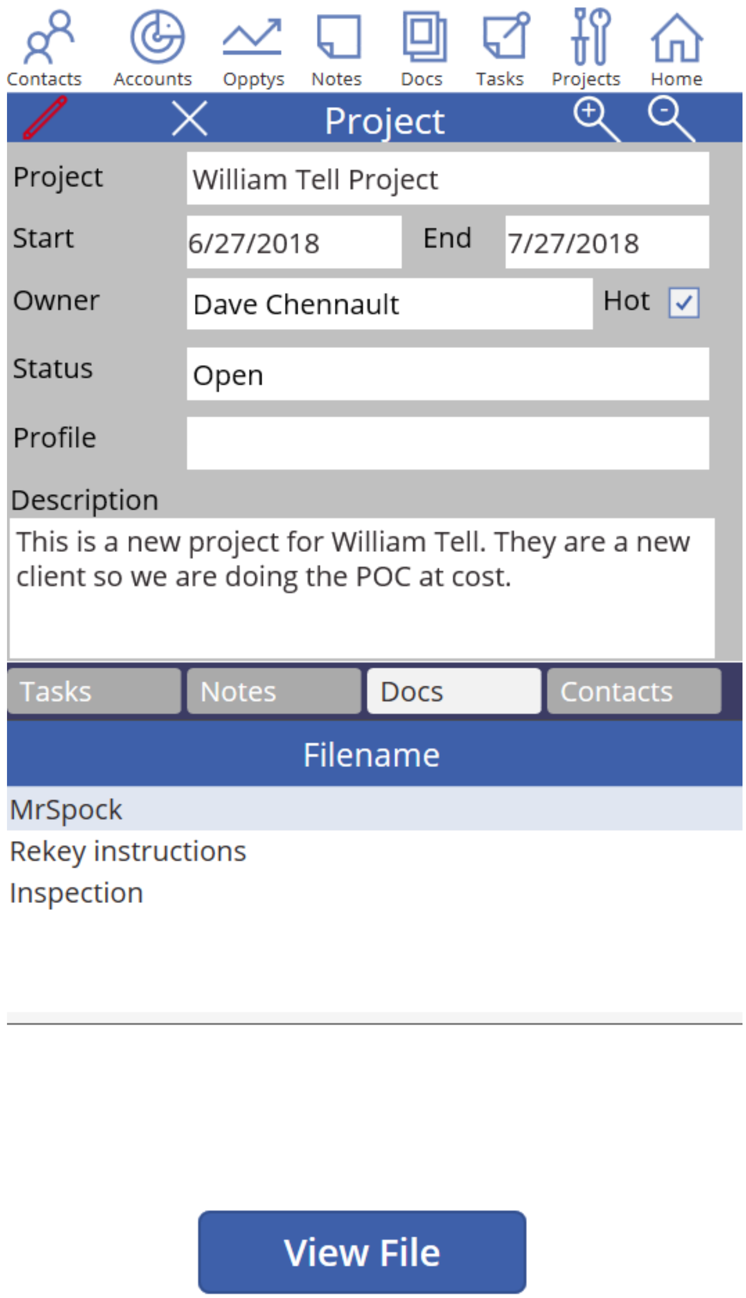
A Project can have Notes associated with it. Notes are not as formal as Tasks, but they can have an email reminder associated with the Note.



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

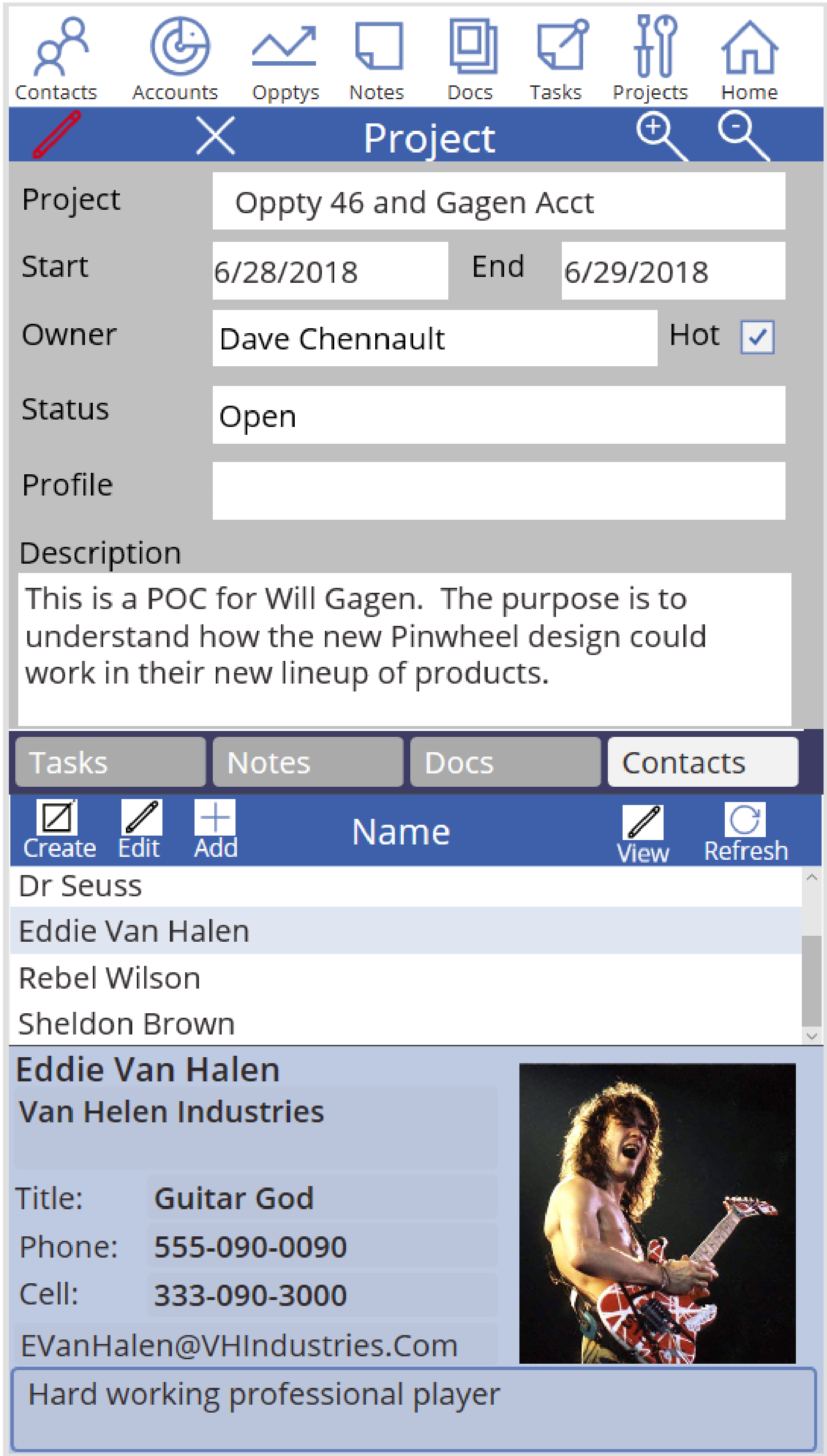
Documents

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.



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.

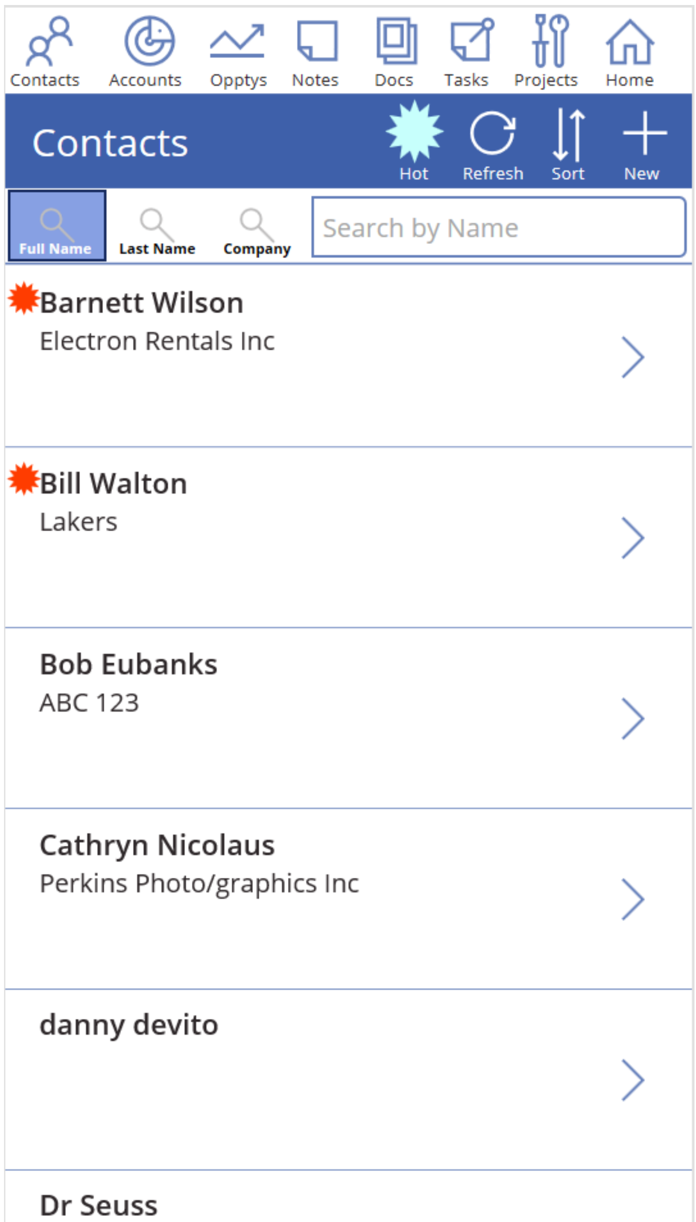


Contacts Module

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

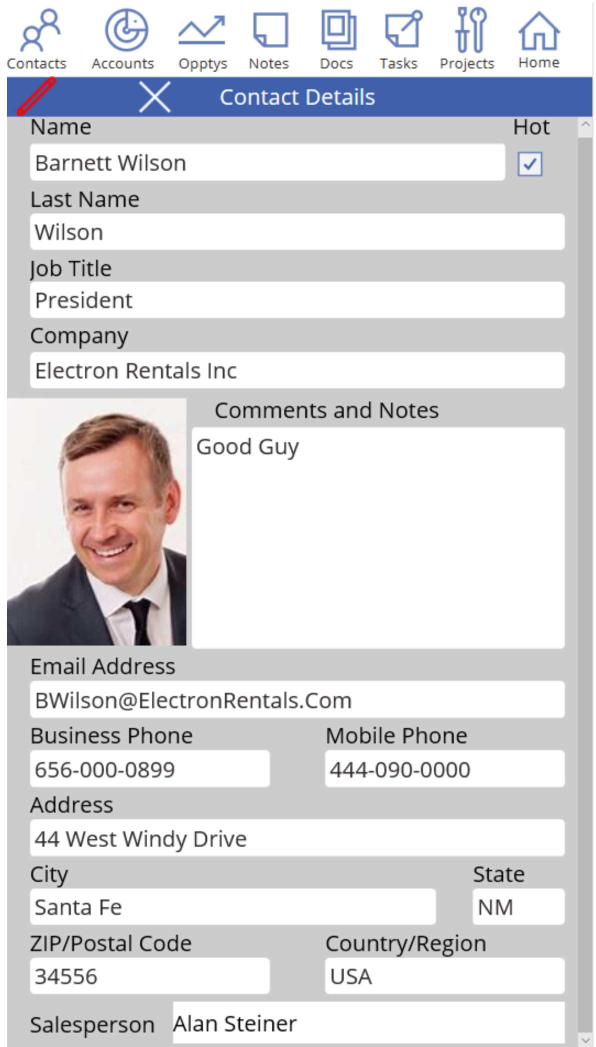
The controls on the Contact list are used to filter, search, sort and add Contacts. You can search by the full name, last name or company. You can filter using the “hot” button. You can use the hot button in combination with the Search to find only hot contacts that meet your search criteria. Finally,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



Controls

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

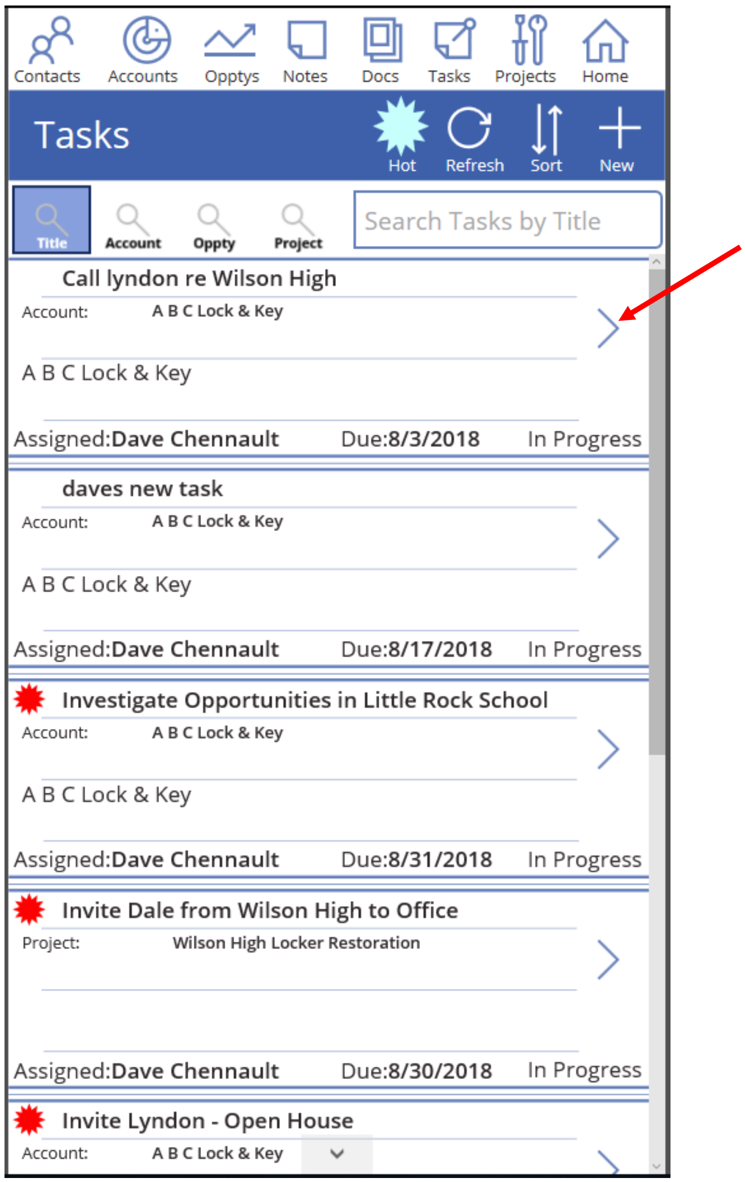
Disk – Use the Disk to save the record when adding or editing (The disk icon is not visible until you are in New or Edit mode in the form)

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

Notes and Tasks Modules

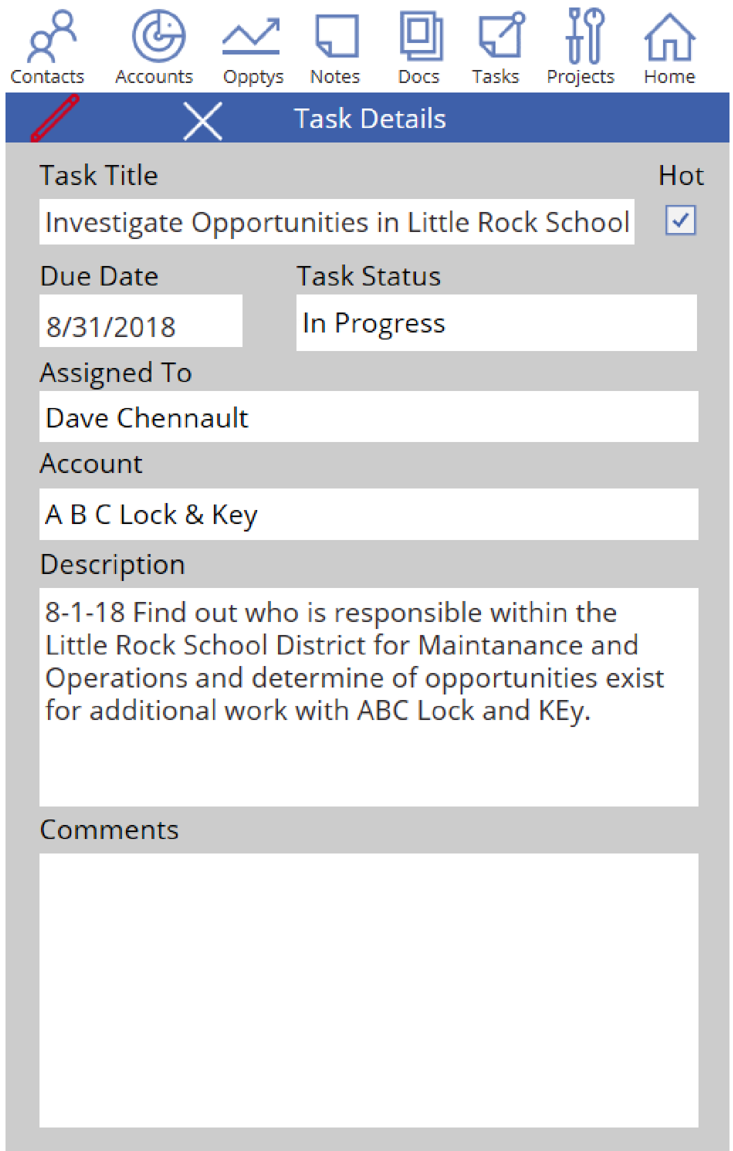
The Notes and Tasks modules are related to an Account, Opportunity, or Project. They work in similar ways so we will cover them both in this section.

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



Task and Notes Detail

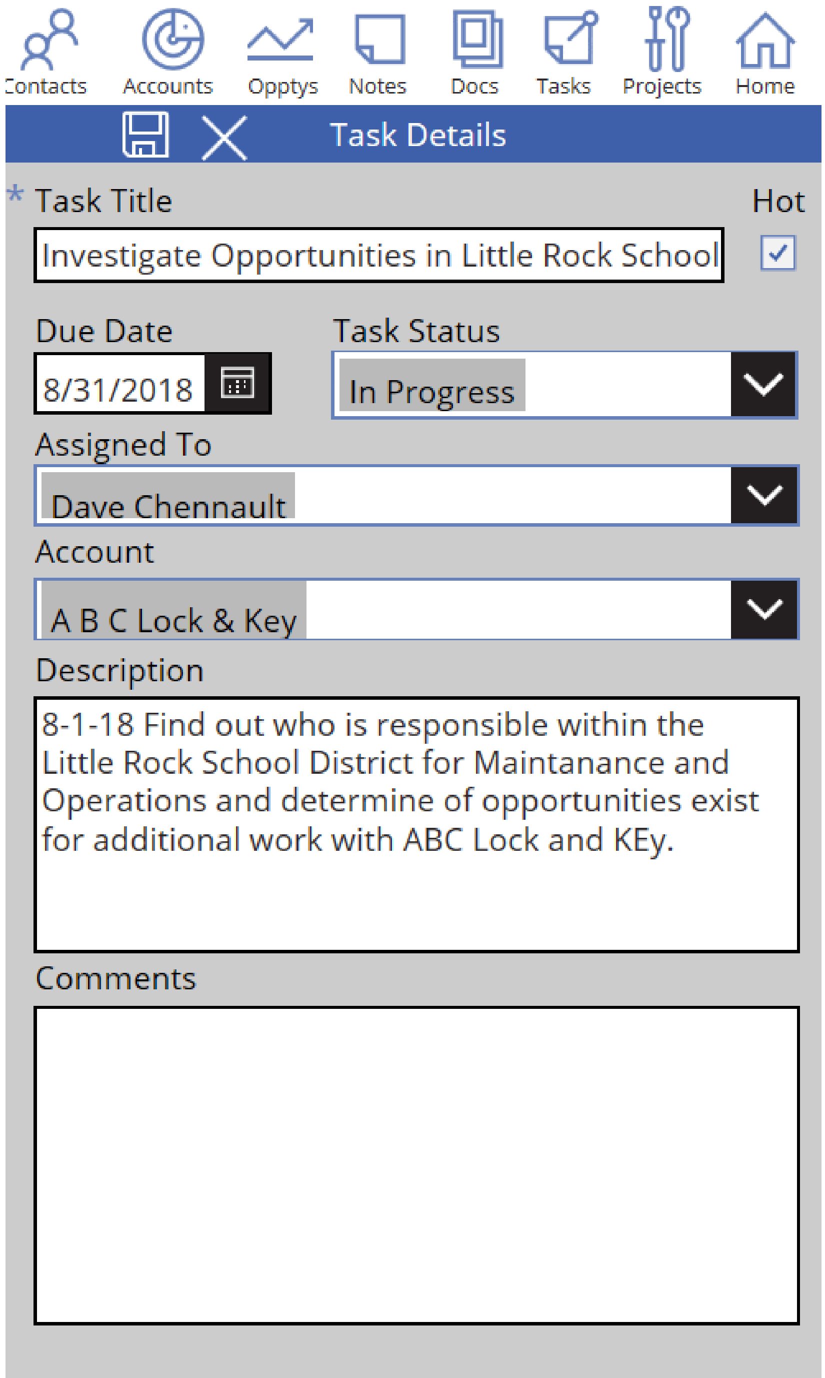
The Task and Notes detail screens have similar functionality. Let's take a look at the Task detail screen.



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



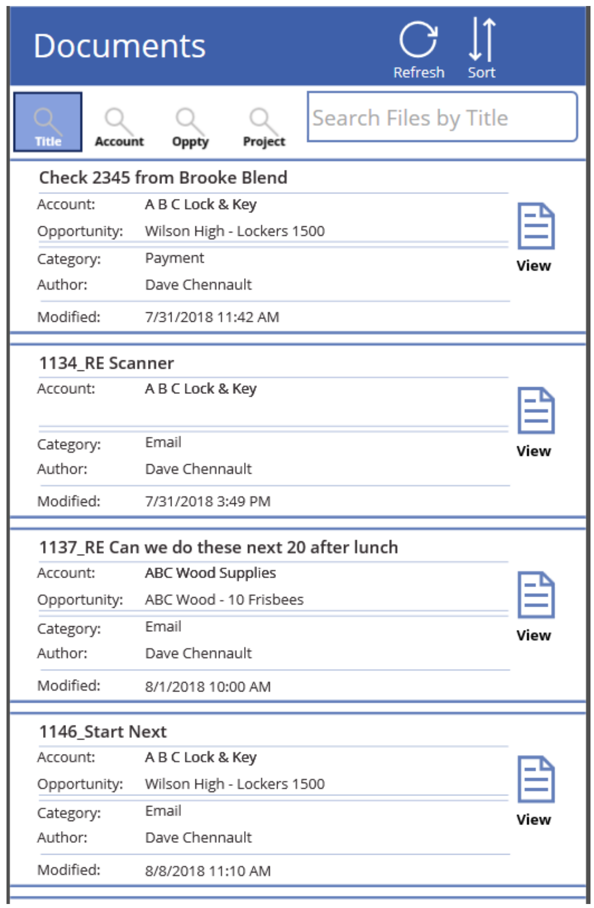
Docs Module

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.

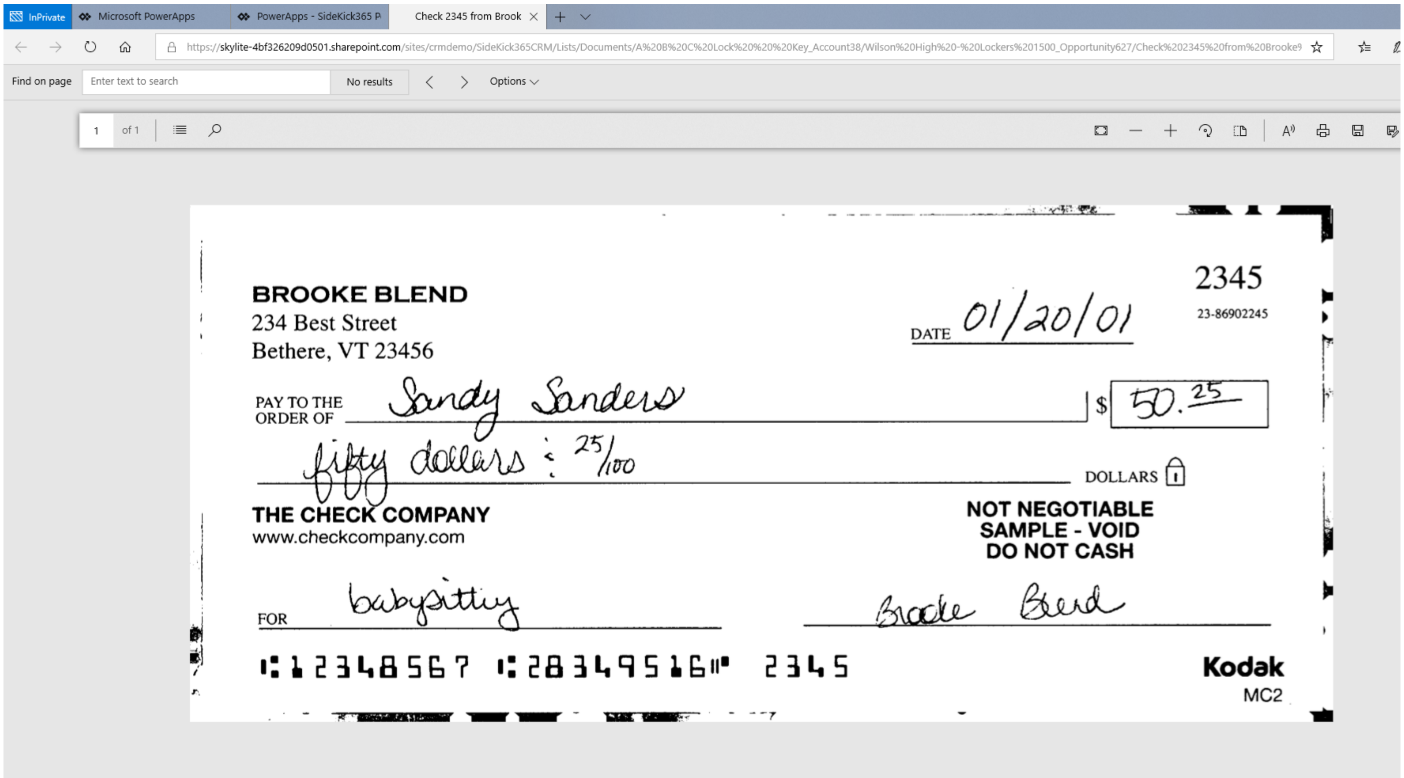
> NOTE – You cant upload files into SideKick 365 CRM from with SideKick 365 CRM Mobile today. This capability will be added when file upload and management within PowerApps fully supports the capability we need.

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 consdider 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 – Us 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

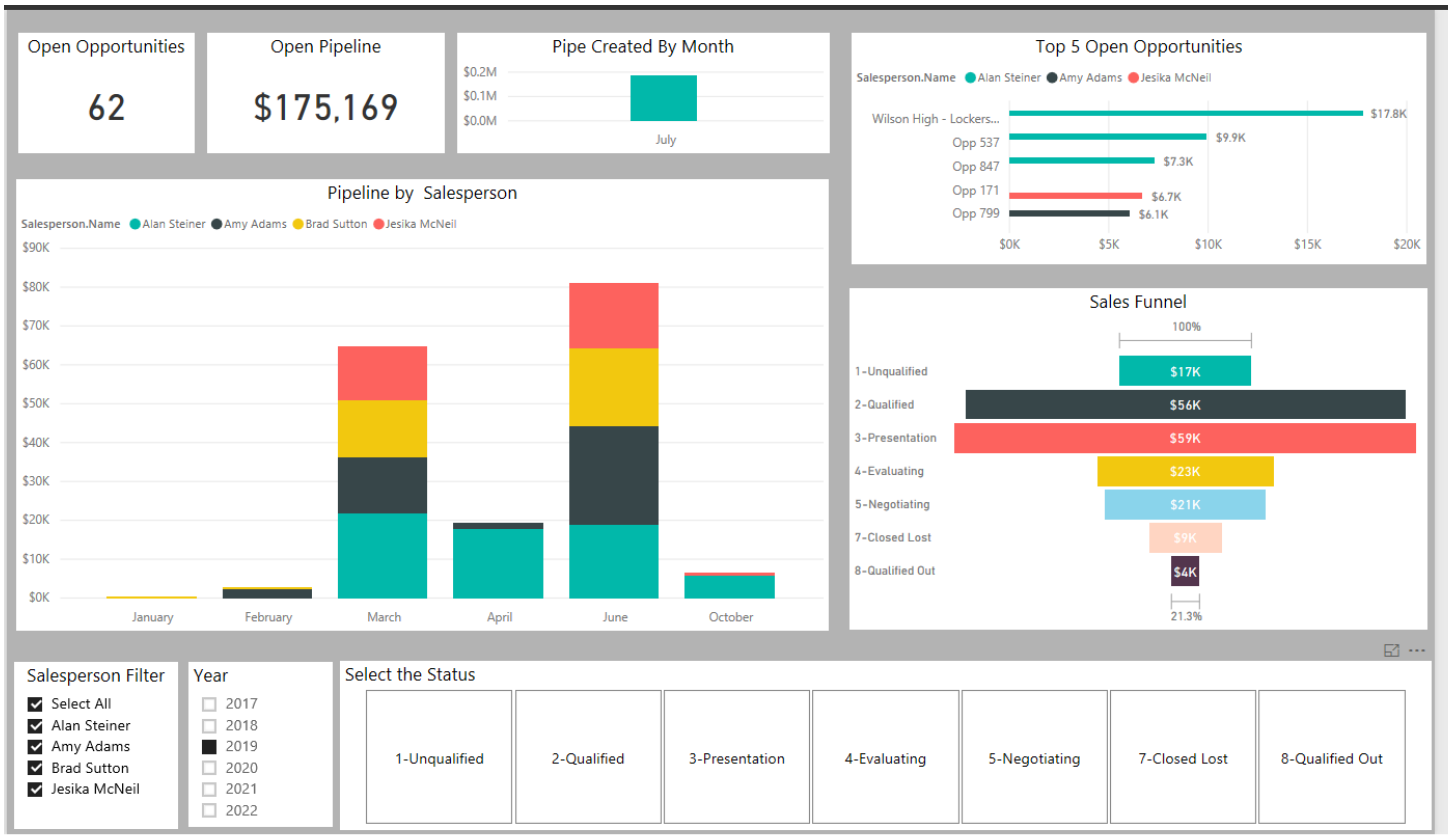
- All of these reports can be tailored and customized to meet your needs using the Free PowerBI Desktop Designer tool from Microsoft.
- The data is automatically updated from SideKick 365 CRM daily so you can walk in the office, grab a cup of coffee and get a great overview of how things are progressing 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:

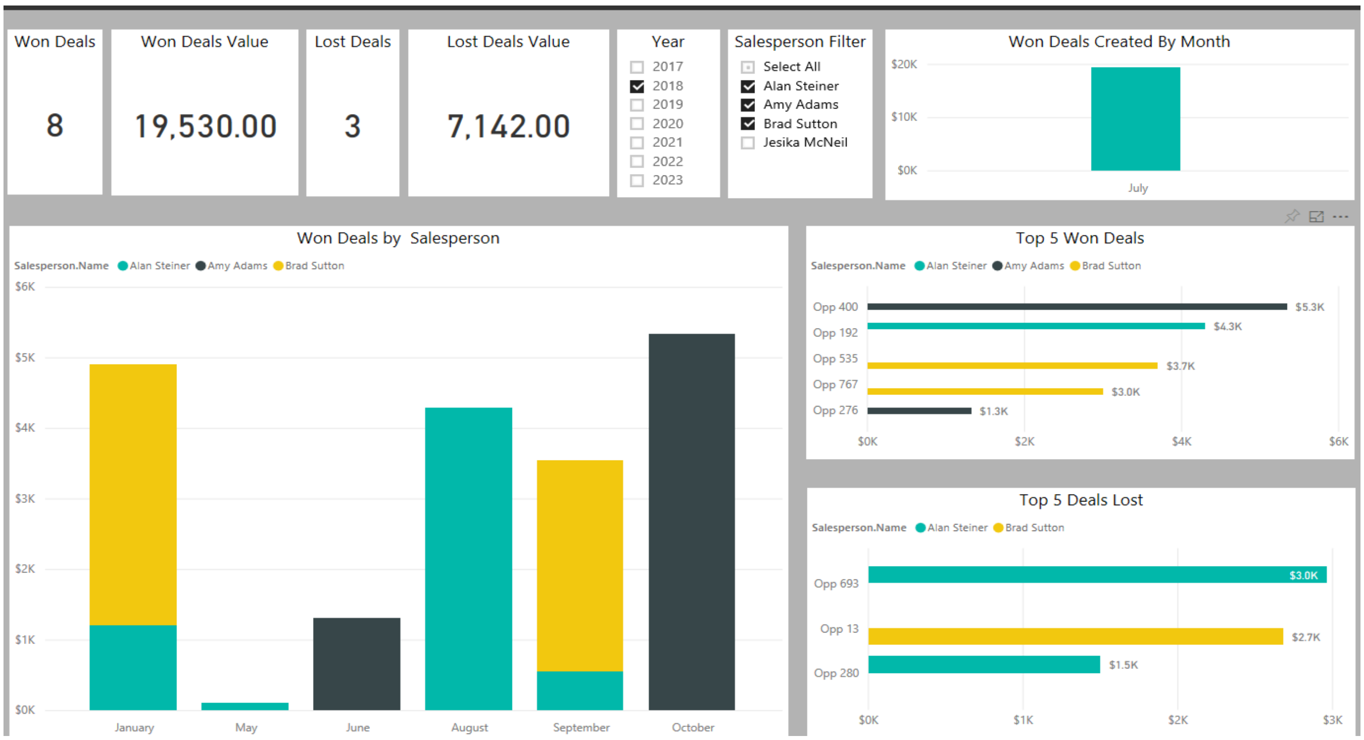
- Pipeline breakdown created by Month and Sales Rep
- Sales Funnel
- Ability to slice based upon Sales Rep, Projected Close (by year) , or Sales Stage
- Top 5 Open Opportunities
- Total pipeline count and value (not this could be weighted or raw value)



Closed Deals

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

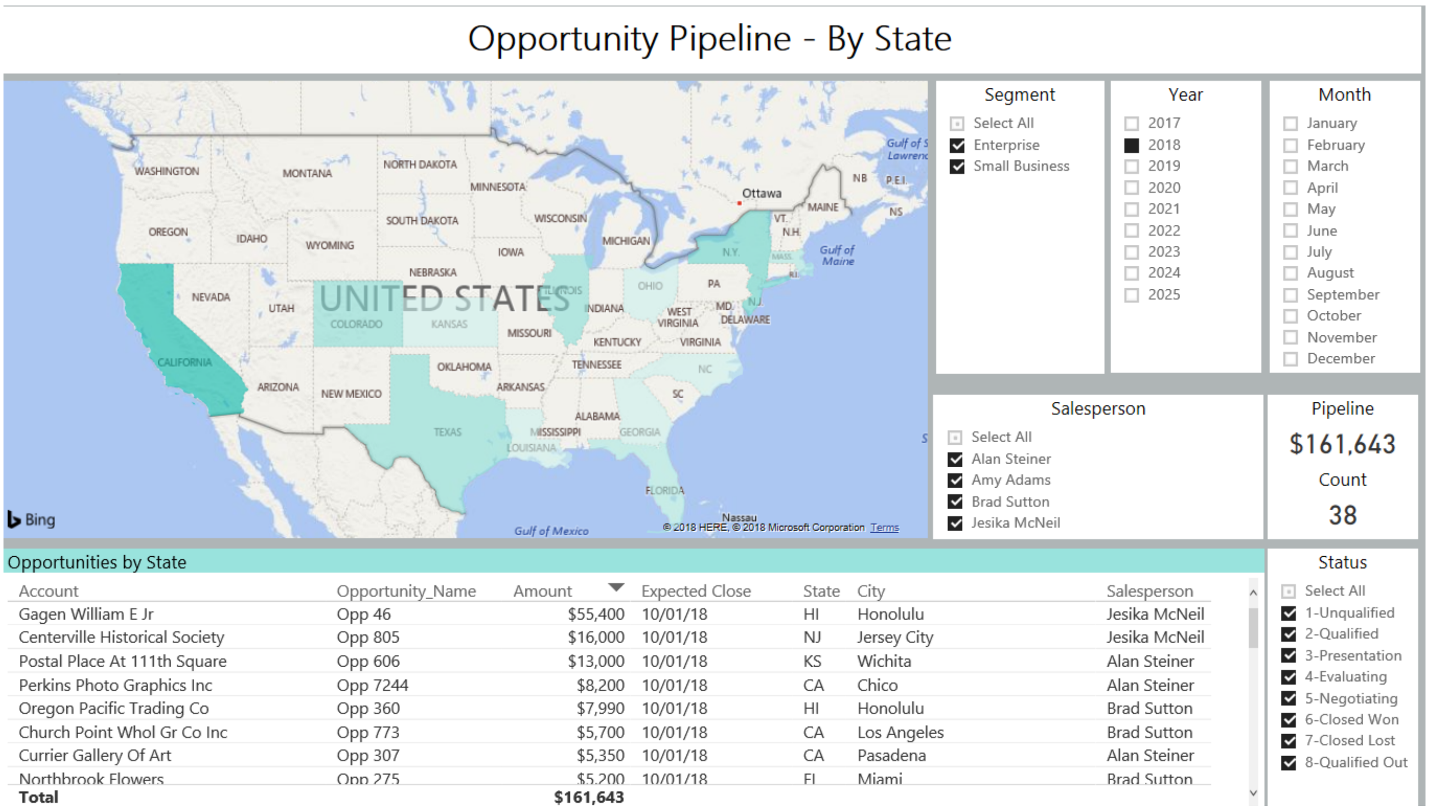
- Won breakdown created by Month and Sales Rep
- Total Won Deals – Count and Value
- Ability to slice based upon Sales Rep, Close Date (by year)
- Total Closed Deals – Count and Value
- Won Deals Created by Month (for aging)
- Top 5 Won Deals by Value (could be weighted or raw)
- Top 5 Deals Lost by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

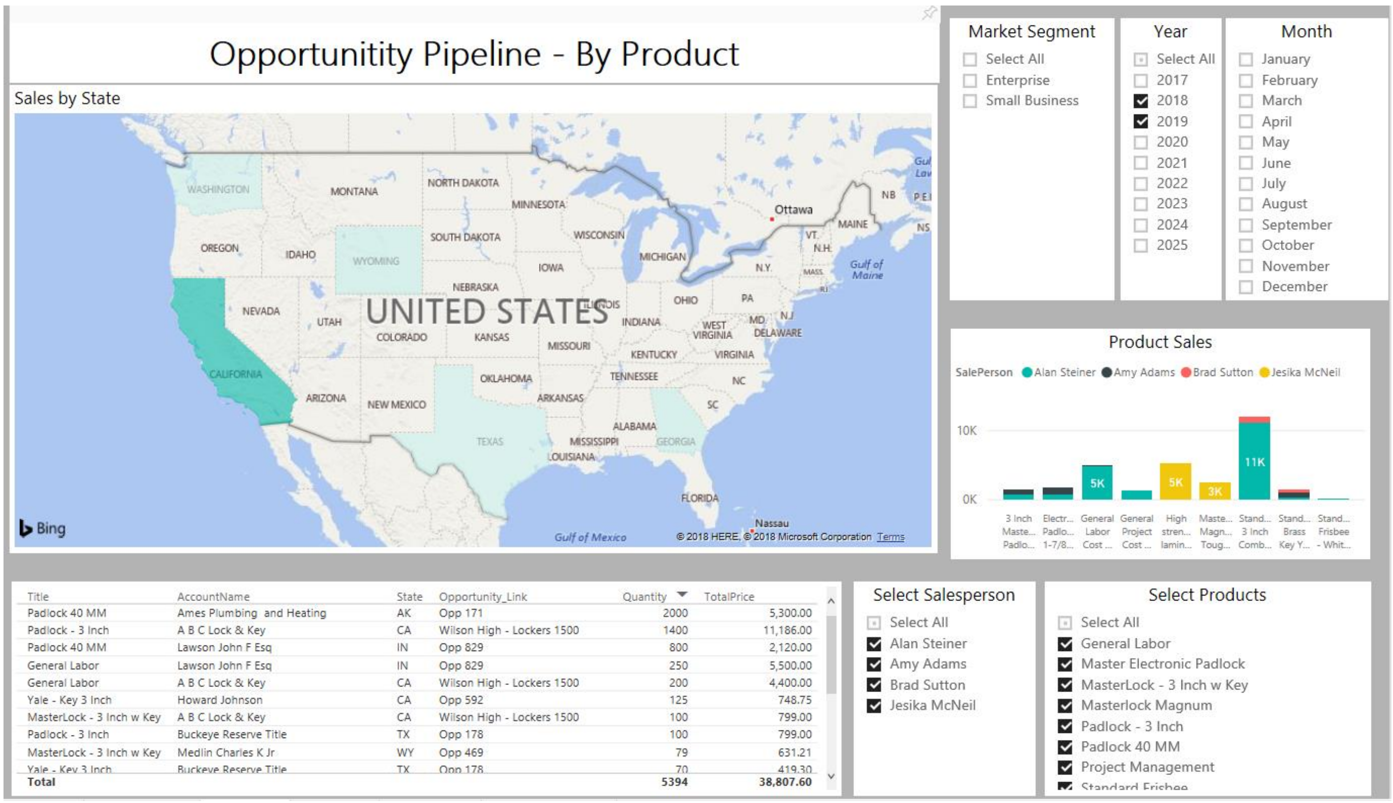
- Slice by Month, Year, Territory, Sales Stage, and Sales Rep
- Total Pipeline – Count and Value (could be weighted or raw)
- Ability to click on a state and filter using the Map
- Detail of Opportunity in Grid below Map



Opportunity Pipeline By Product and State

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

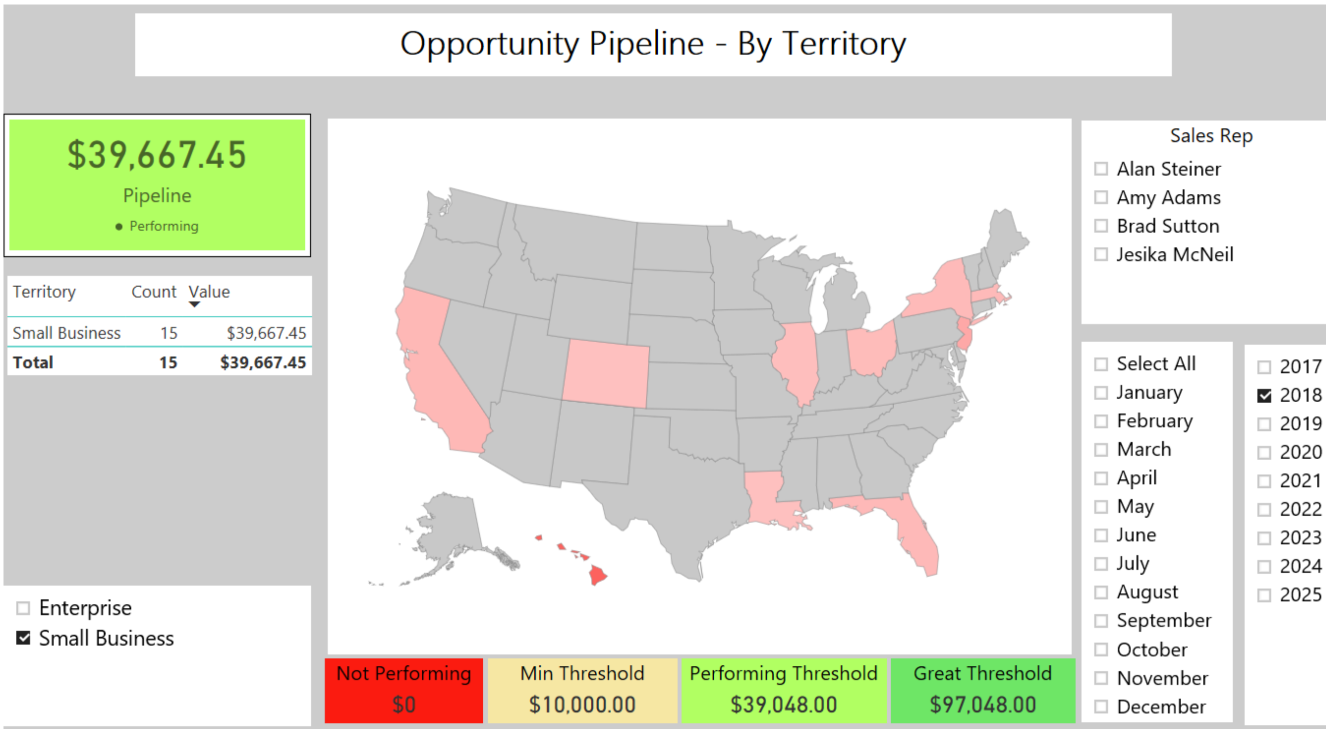
- Slice by Month, Year, Territory, Sales Stage, and Sales Rep
- Total Pipeline –Value (could be weighted or raw) by Product and Sales Rep
- Ability to click on a state and filter using the Map
- Detail of Opportunity in Grid below Map
- Slicing by Product to find out what products are selling where



Sales Performance By Territory

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

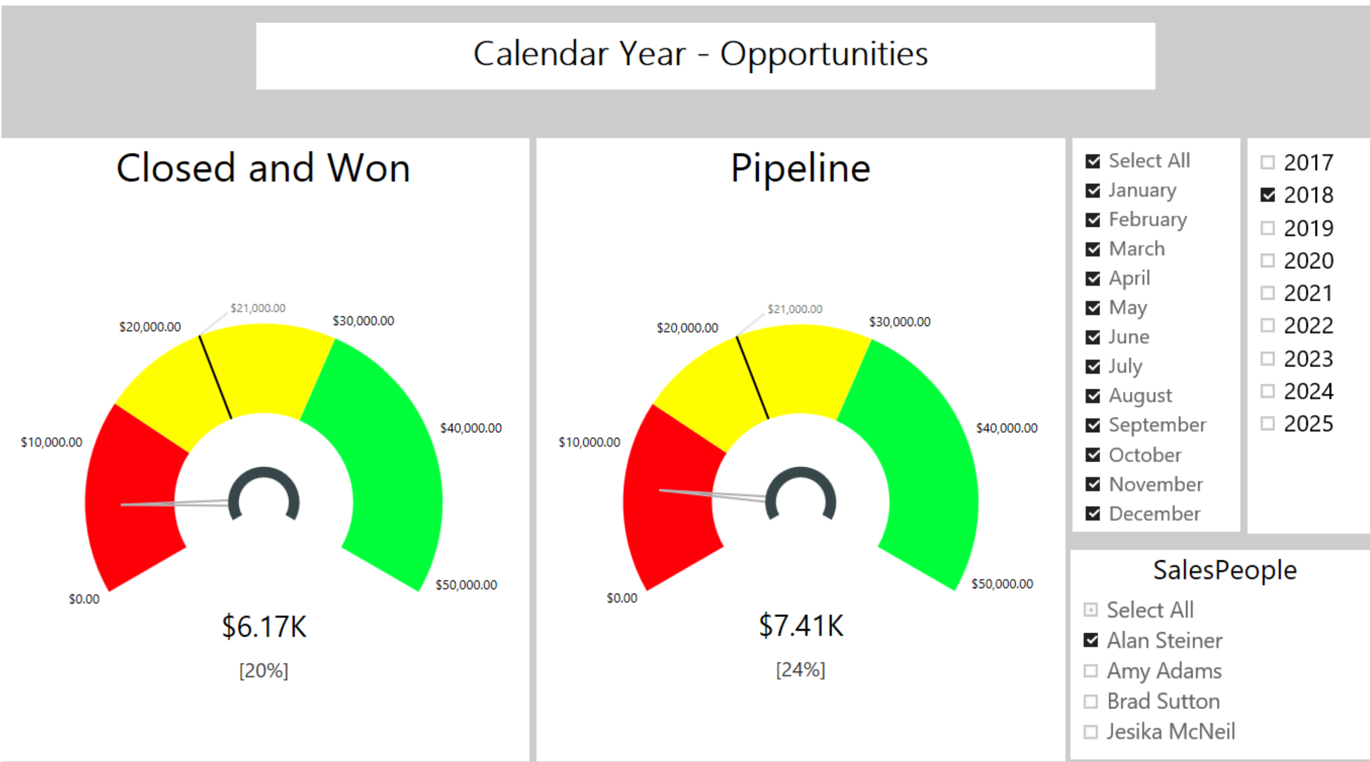
- Slice by Month, Year, Territory, and Sales Rep
- Total Pipeline – Value (could be weighted or raw) by Product and Sales Rep
- Ability to click on a state and filter using the Map
- Ability to Filter By Territory
- Pipeline versus Target health Check – Count and Value



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:

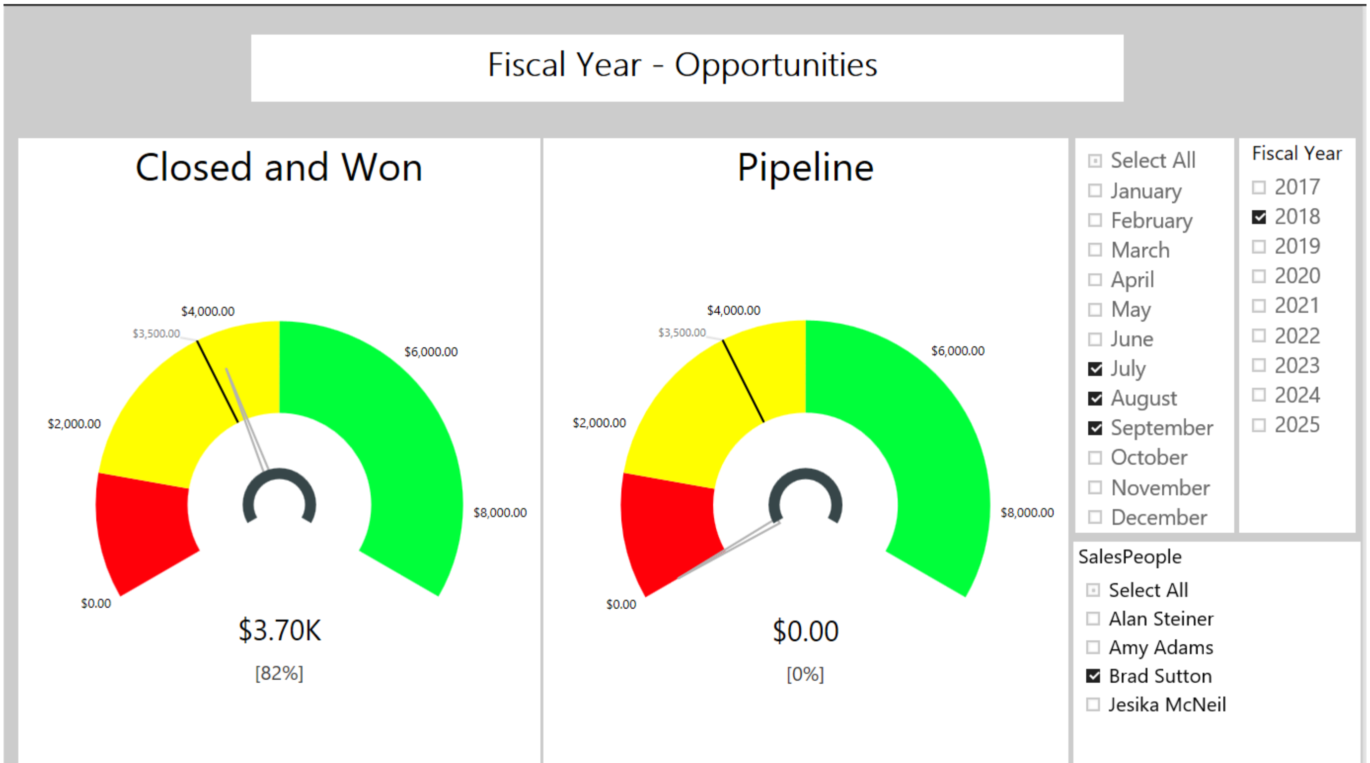
- Slice by Month, Year, and Sales Rep
- Total Pipeline – Value (could be weighted or raw) by Sales Rep(s)
- Total Closed Deals – Value (could be weighted or raw) by Sales Rep(s Ability to Filter By Territory
- Actual versus Target gauge health Check –Value



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.

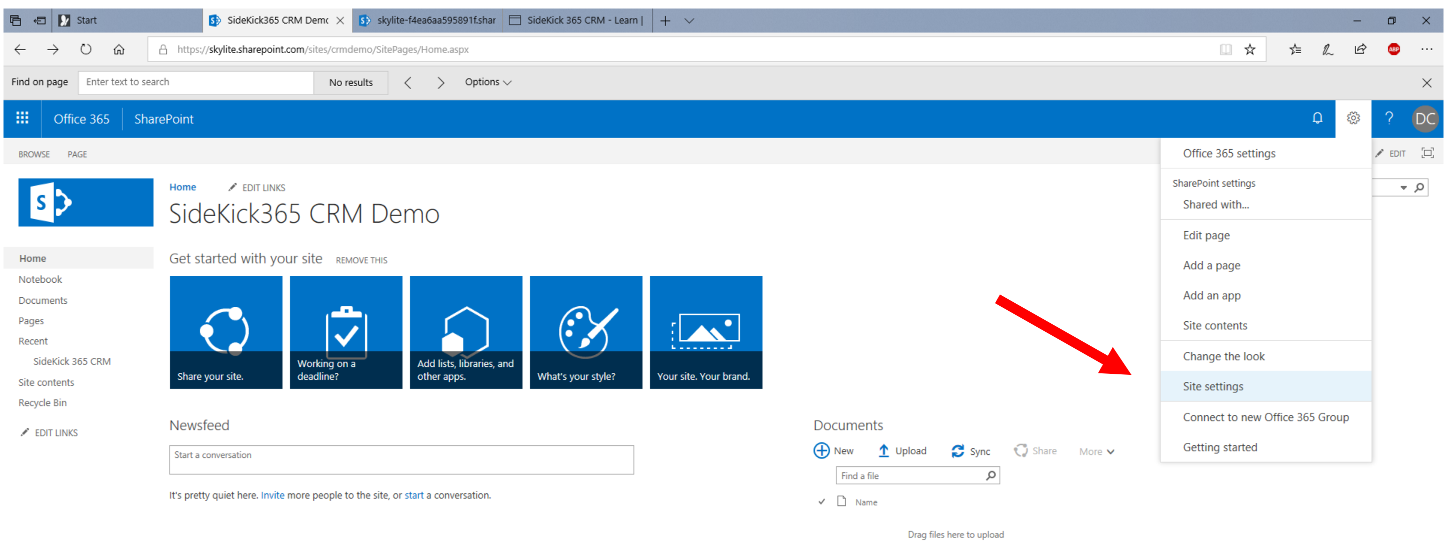
Setting up Templates Using Content Types

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)

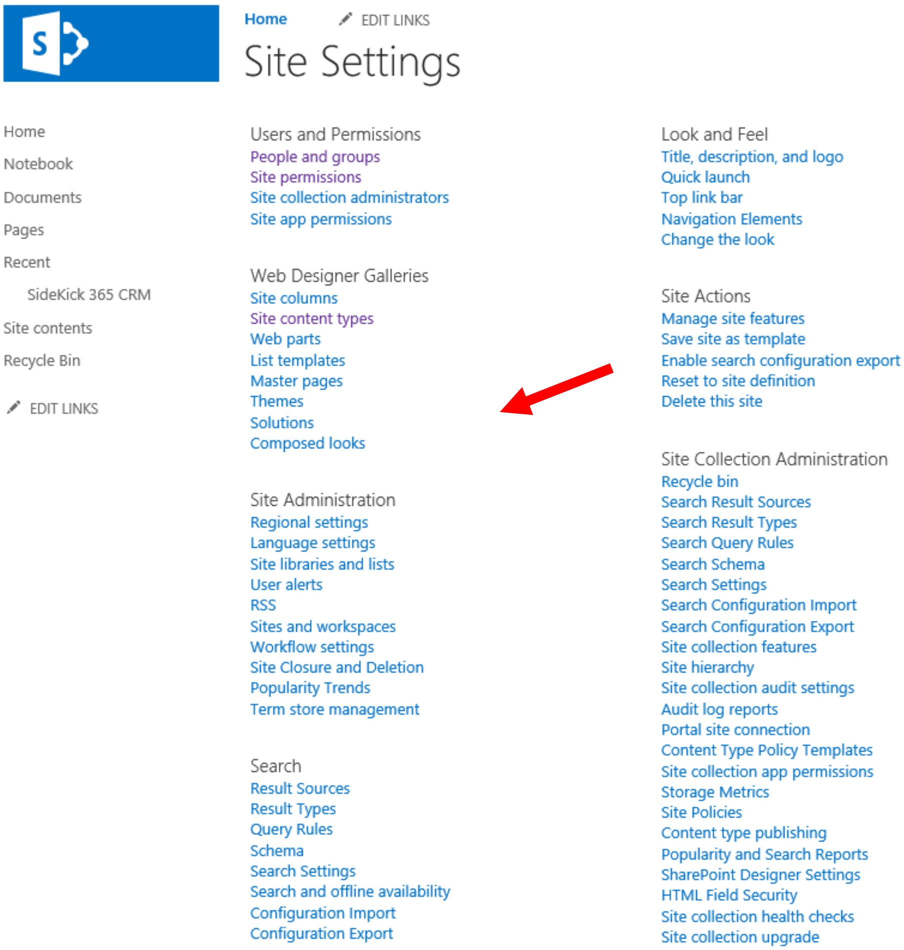
Creating a Template from an Excel Spreadsheet

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

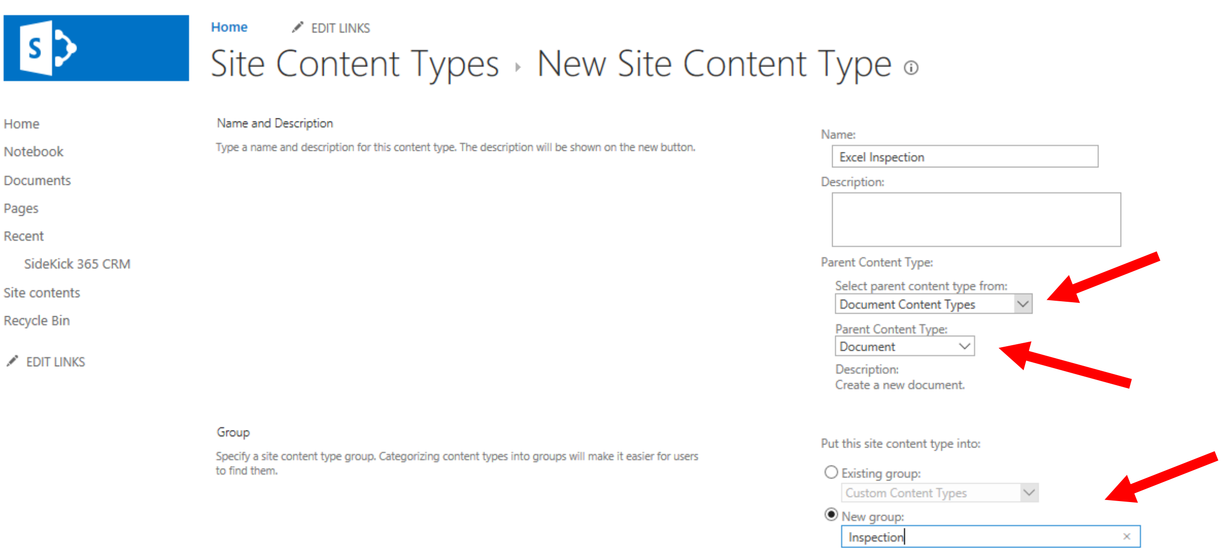
- Go into the hostweb (the site that holds SideKick 365 CRM) and go to the site settings by selecting Create Site Actions -> Site Settings



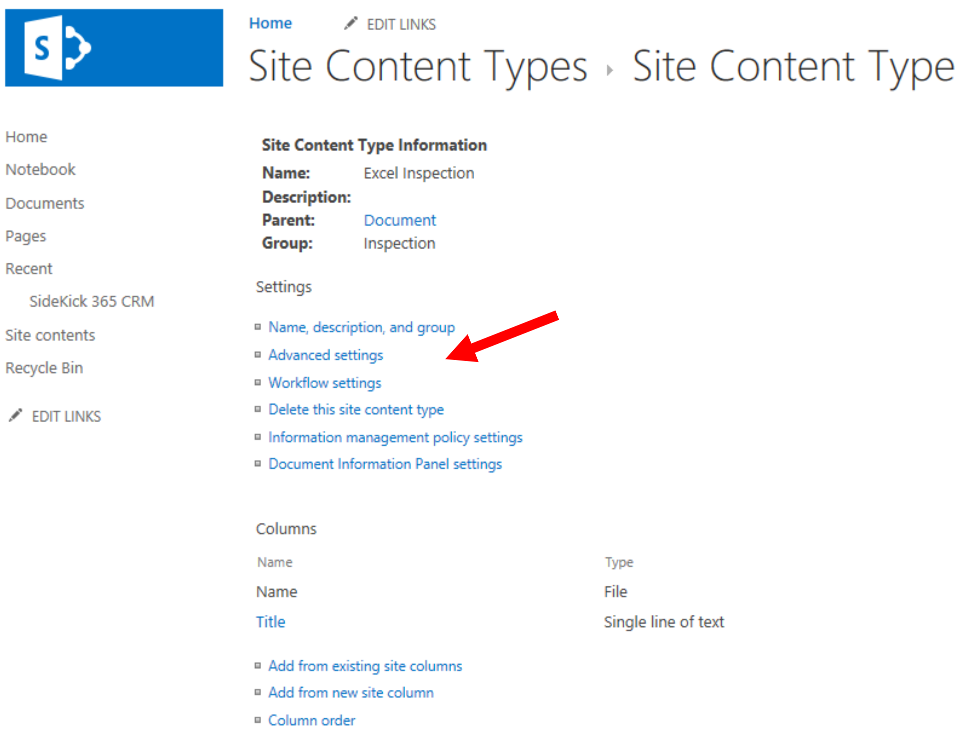
Then select -> Site Content Types under Galleries.

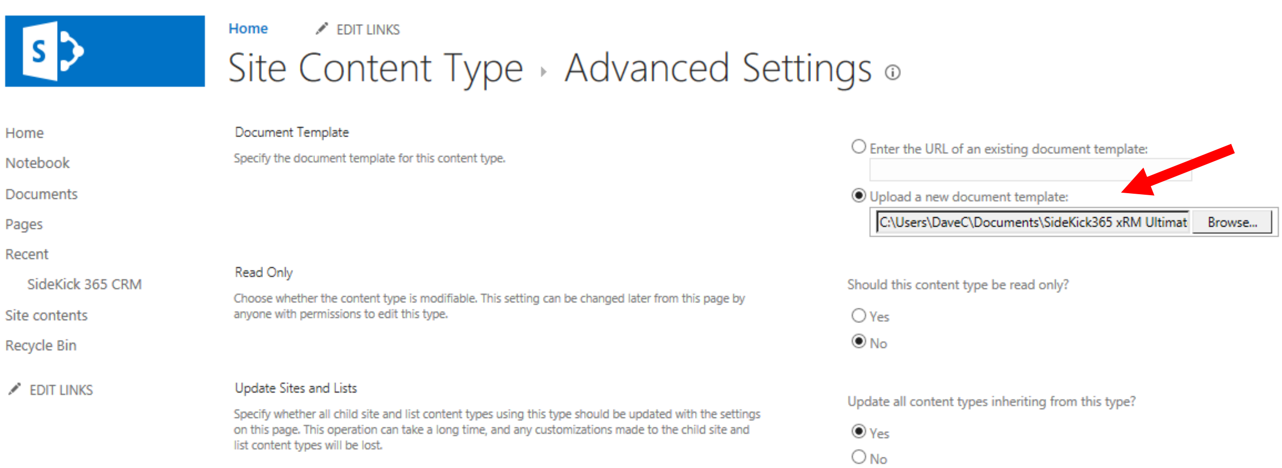


- Use the Parent Content Type **Document** from **Document Content Types** Group.
- Name the content Type something like "Excel Inspection".



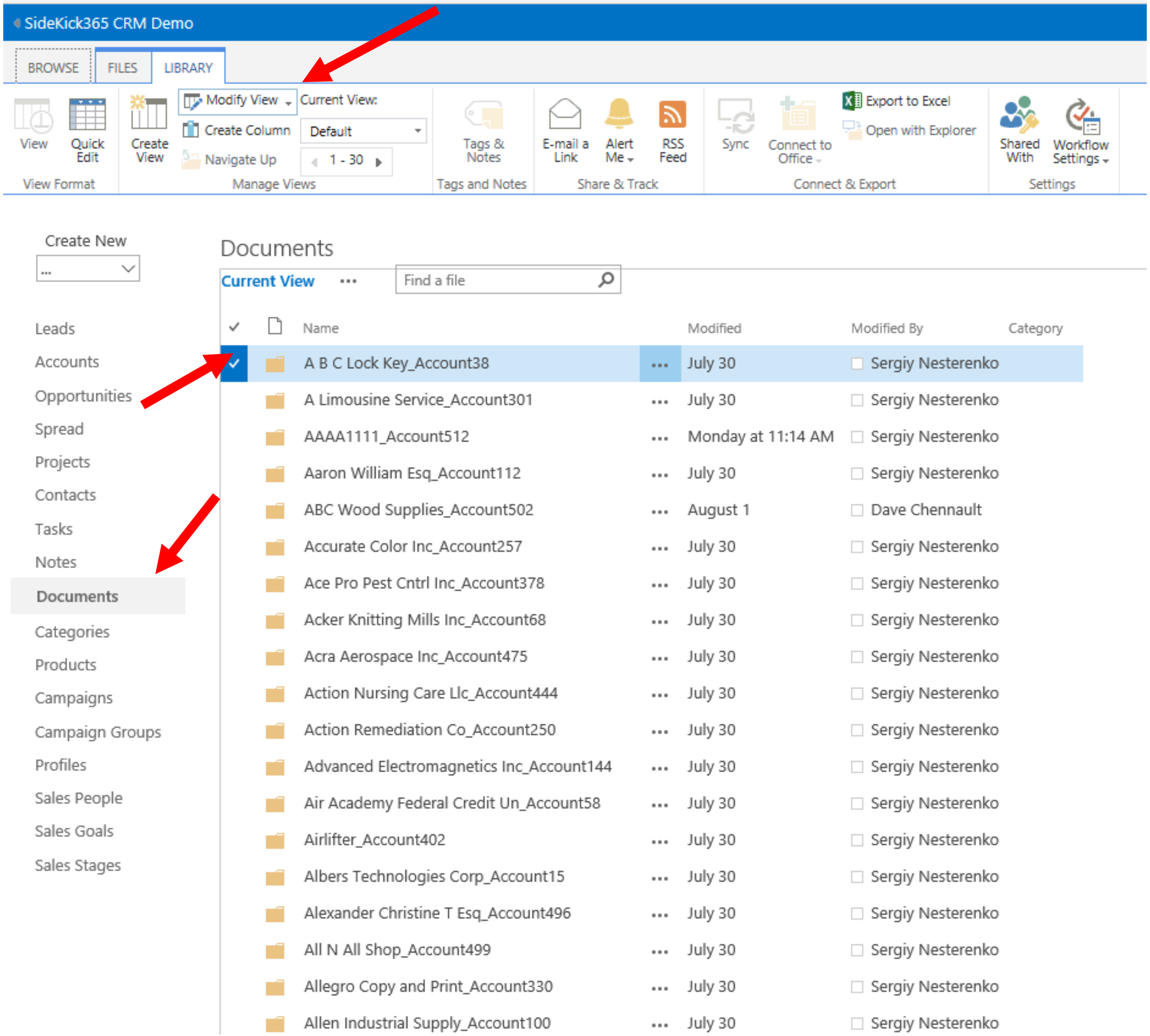
- Once you hit OK in the screen above, go to the Advanced Settings of the newly created content type, add a new Excel file.



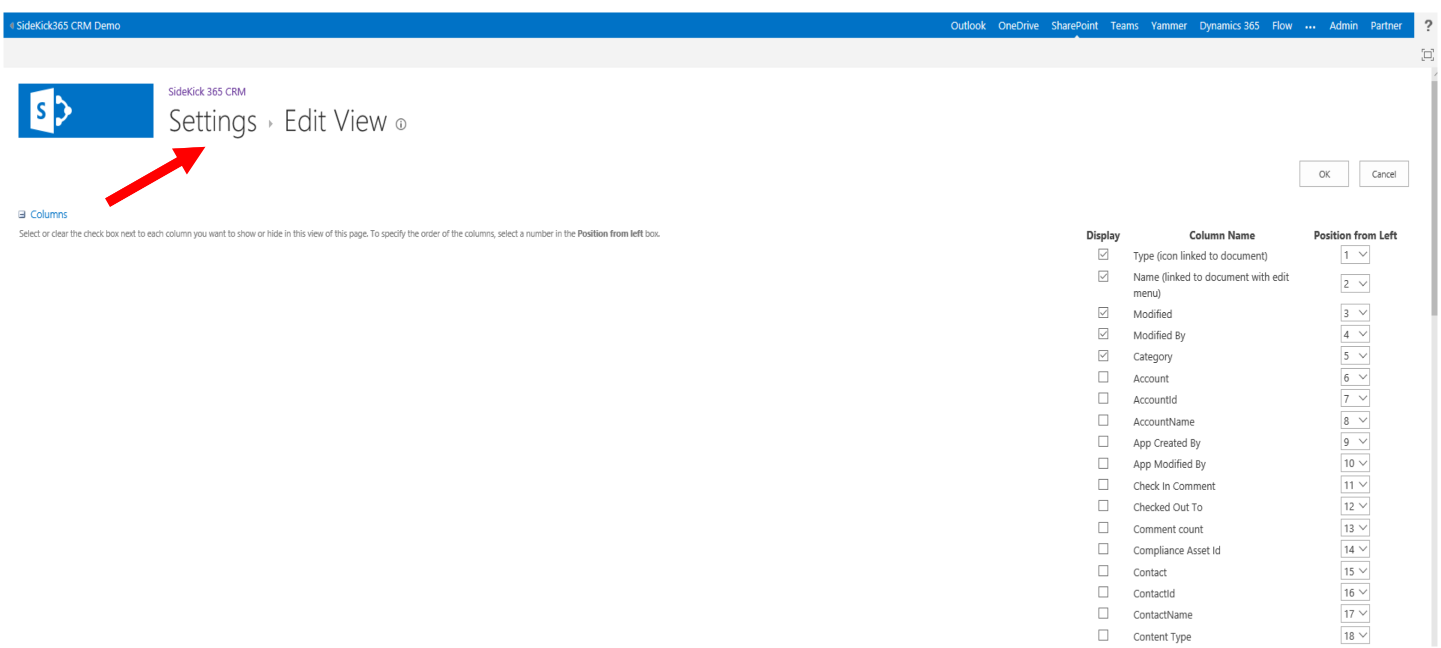


Good job! Now you have the template loaded as a Content Type in the Host web, now we need to add it to the document library in SideKick 365 CRM. Let's get started…

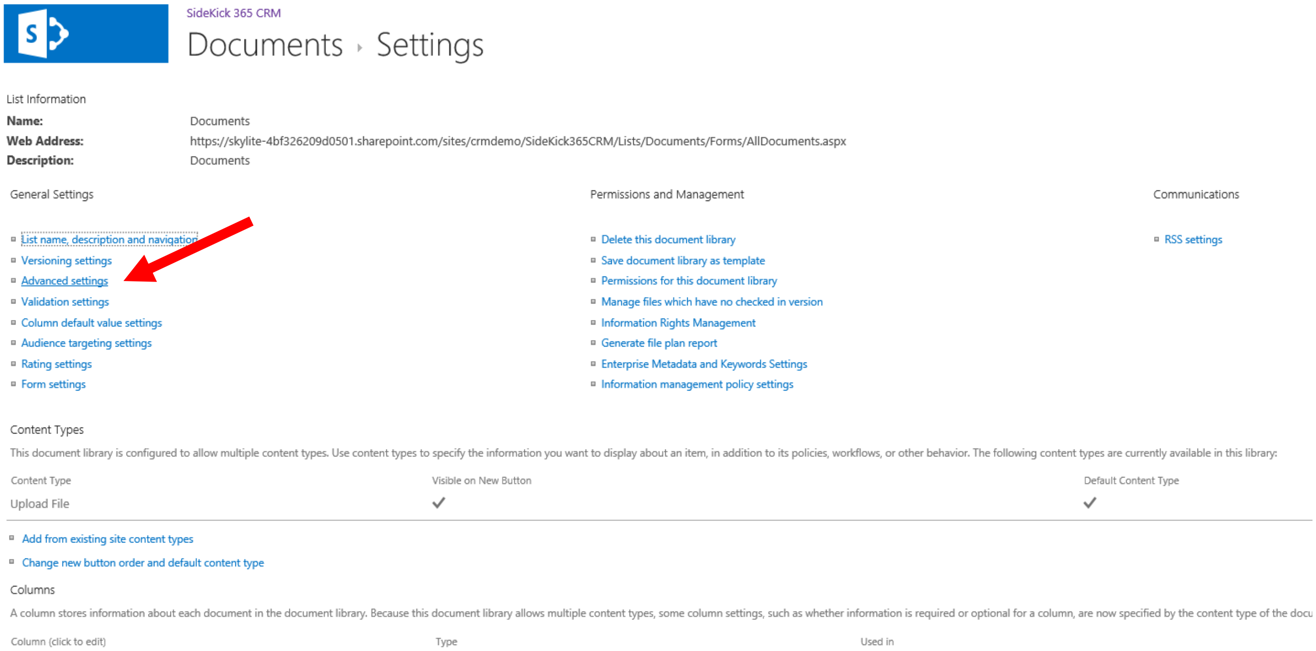
- Open SideKick 365 CRM
- Select the Documents Module by picking Documents in the lefthand menu
- Now select any folder in the document list by selecting the checkmark column **with a single click to activate the library tab** and then select "Modify View"



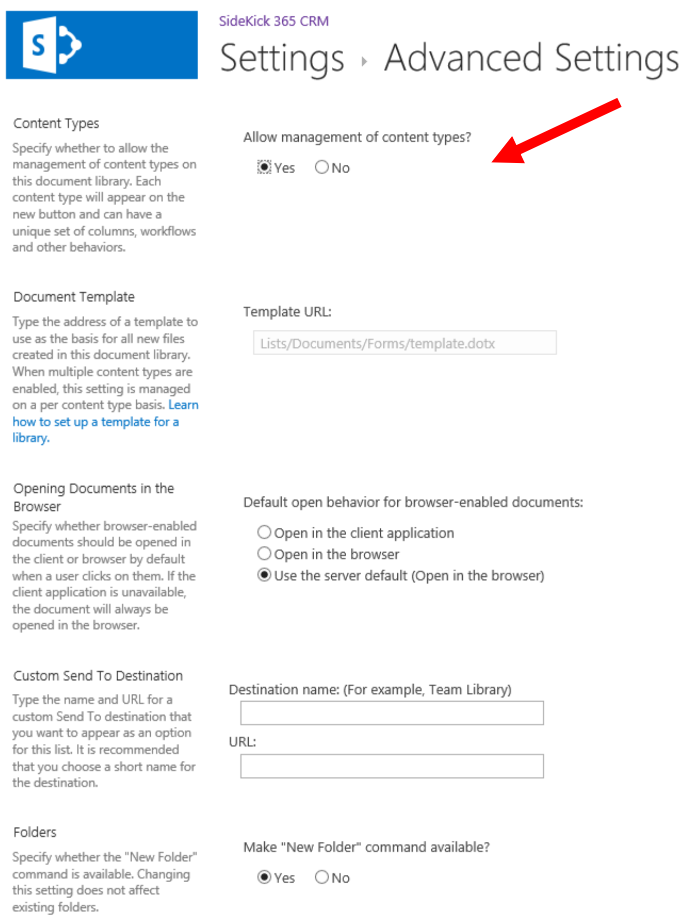
- Now select the word Settings to get into the Document Library Settings



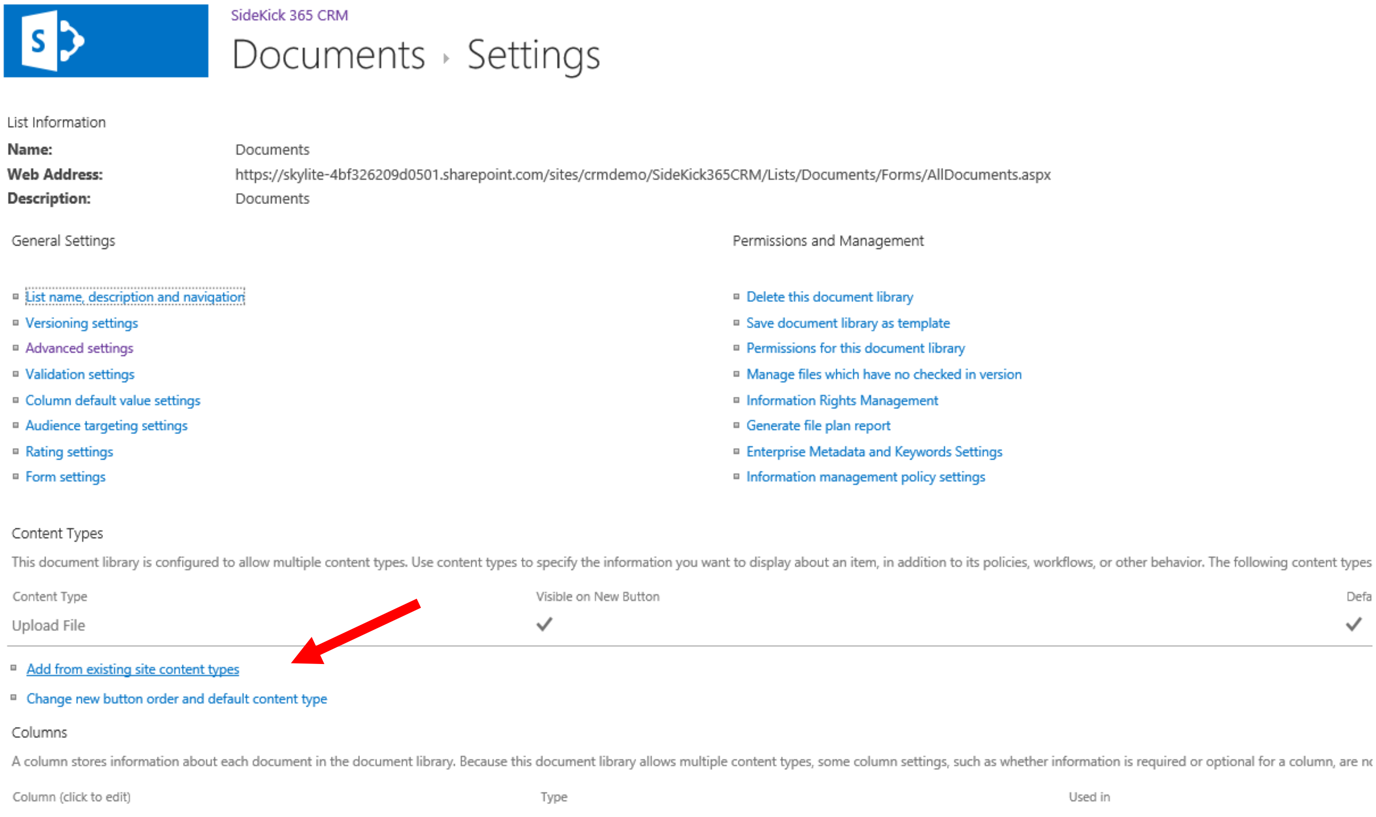
- Next, select Advanced Settings.



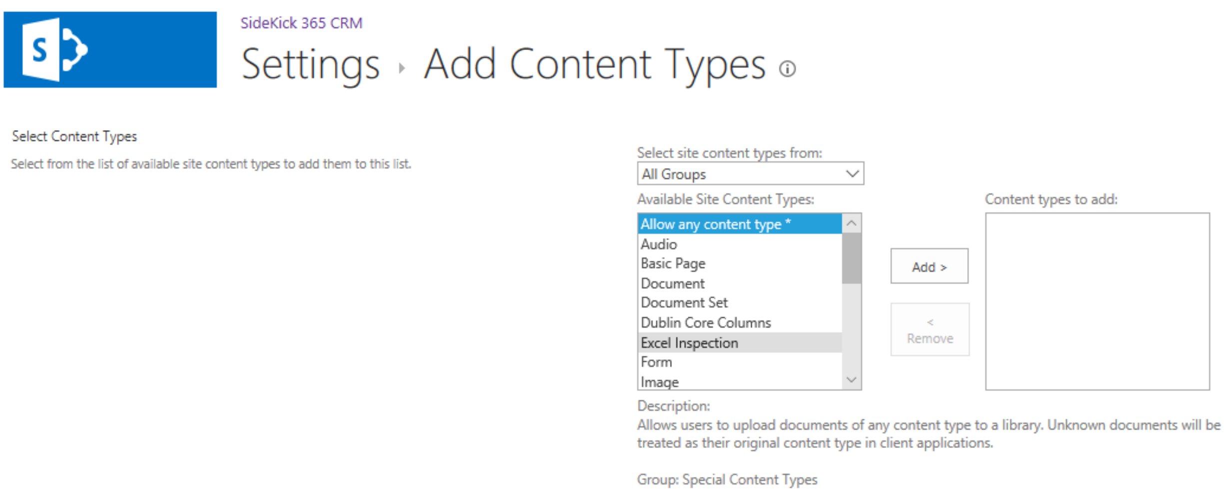
- Here, set **Allow Management of Content Types** to **Yes** and click OK. This takes you back to the Document Library Settings page



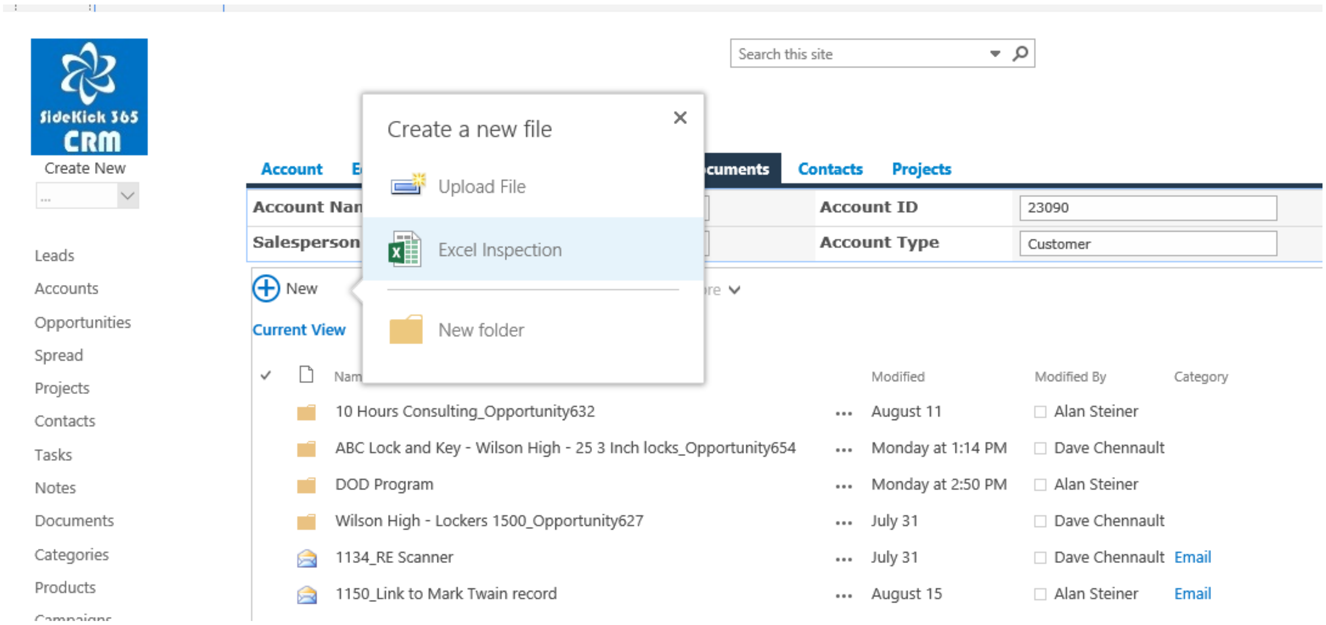
- Now scroll down to the Content Types section and select "Add From Existing Site Content Types"



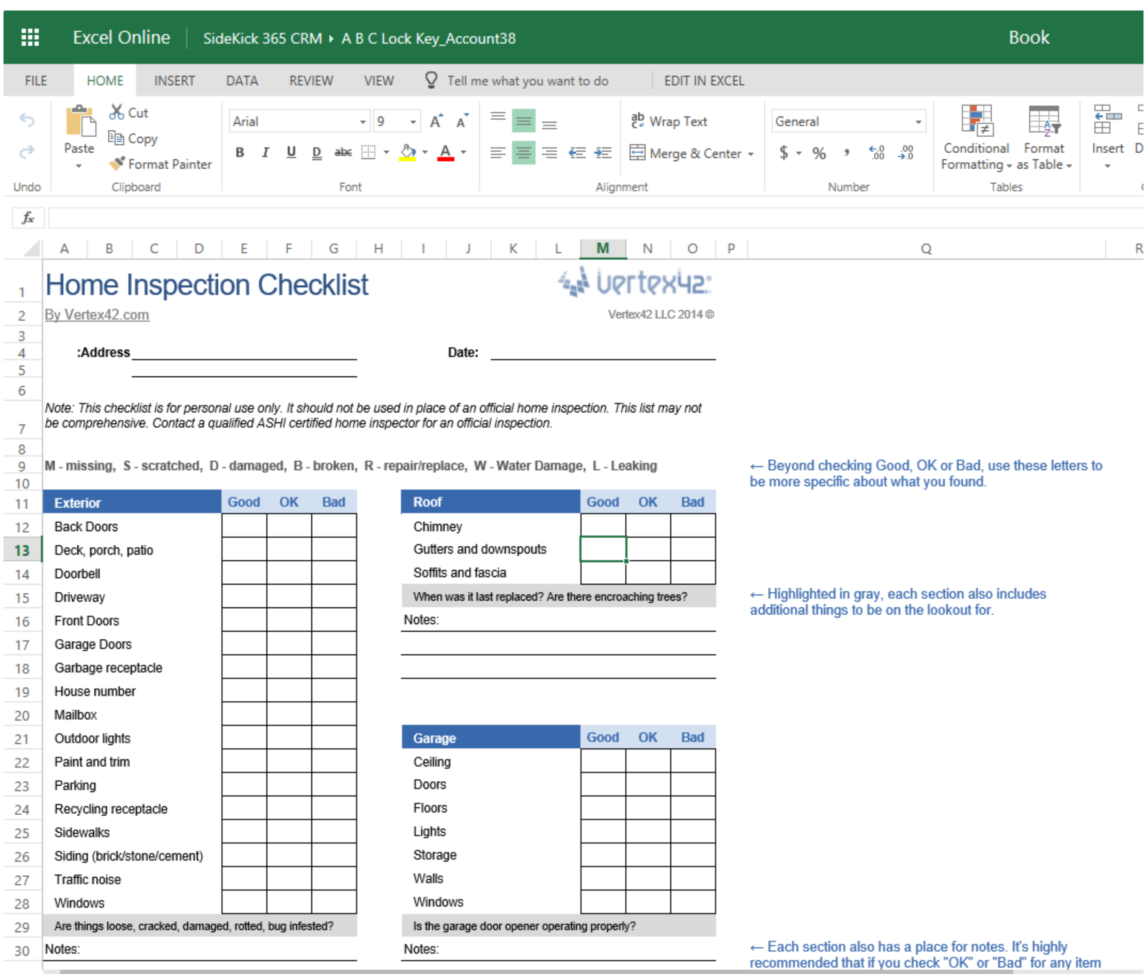
- Next, Add the Newly created Content Type "Inspection" to the Library and hit "OK".



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.



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



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.