Rules of the Sea

The SalesAhoy Administrator Guide

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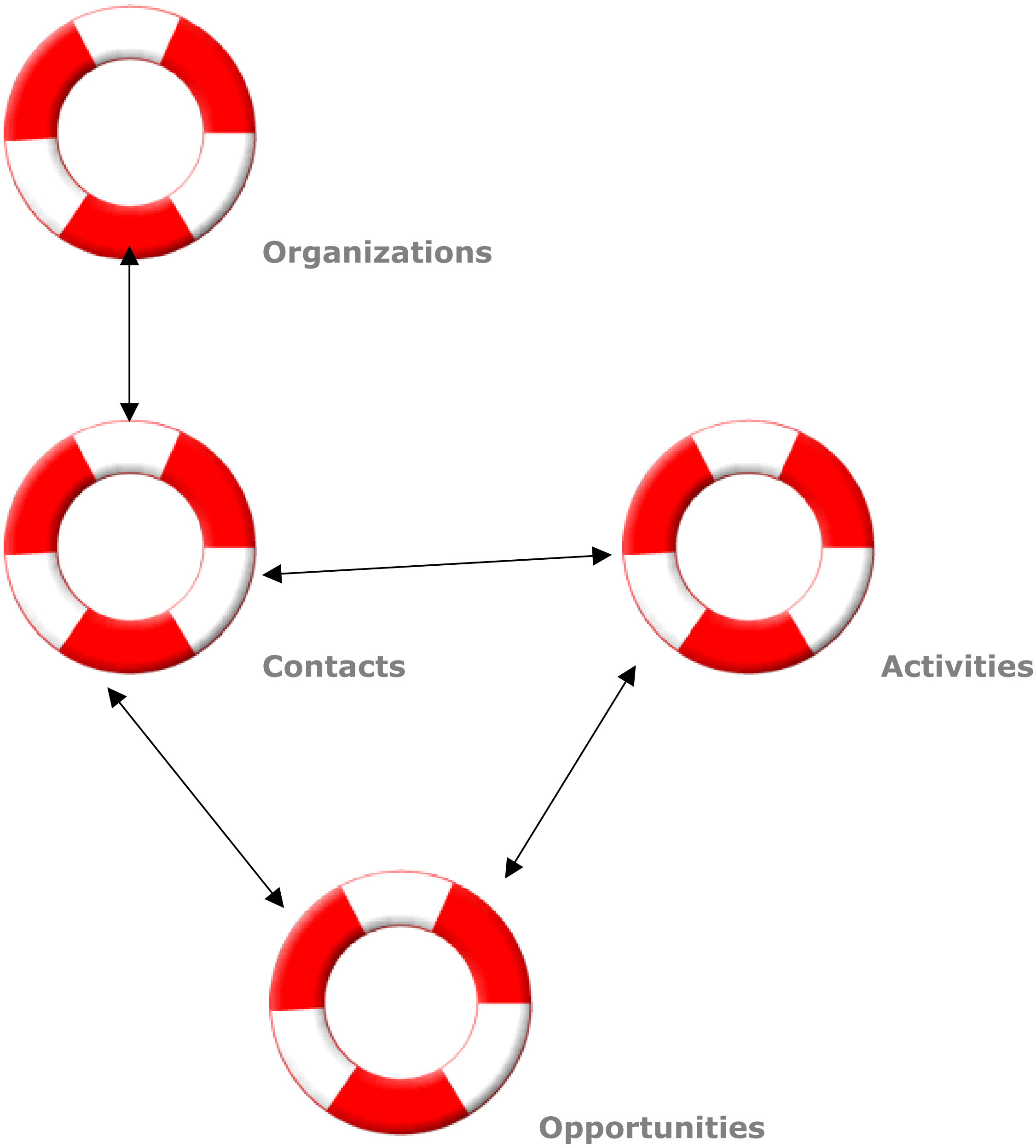
SalesAhoy is a highly flexible, simple to use CRM system. The flexibility means you can more easily make it fit within your existing sales process.

This is how it works.



Signing in
This is always done from the first page www.salesahoy.com
We use email address as a user name, this is because people generally can remember it. (Well, mostly!)

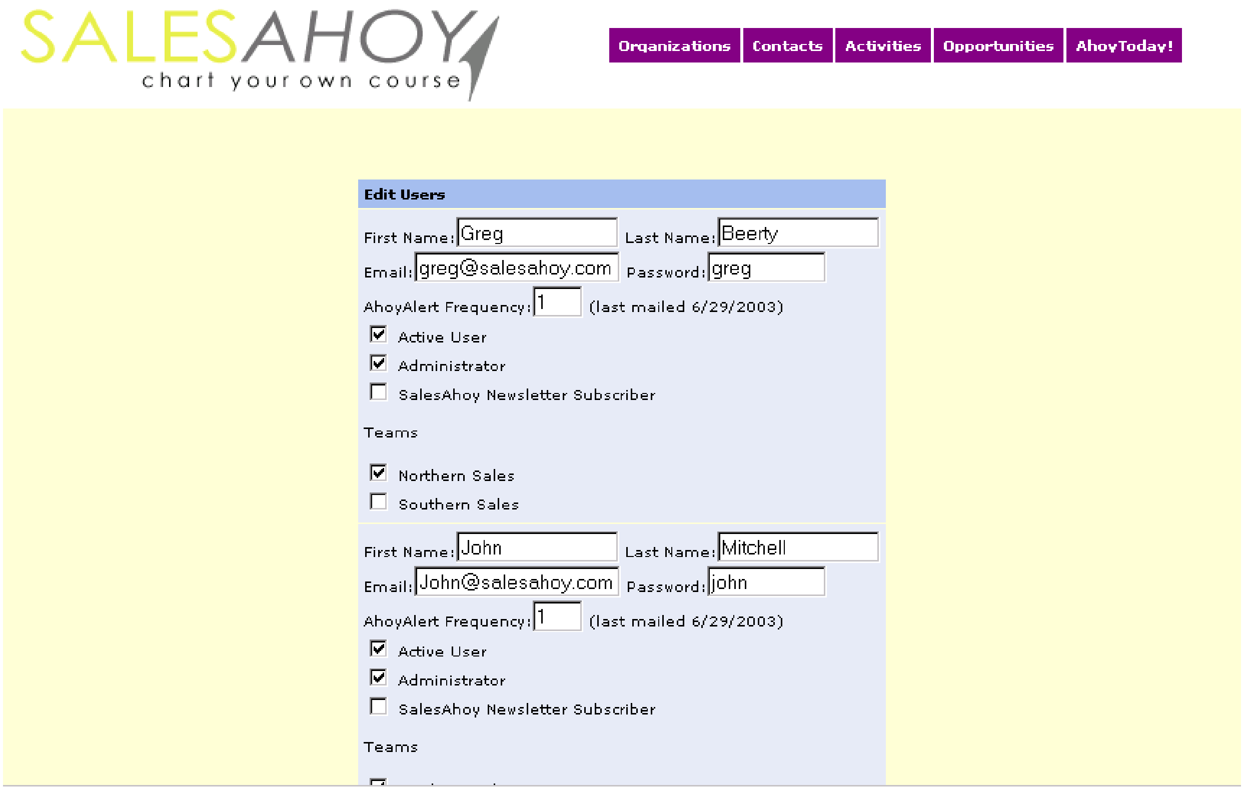
Creating your SalesAhoy records
If you want to create a brand new record, you start with the Organization, and then you create a Contact. You can create as many contacts as needed. Activities & Opportunities then belong to Contacts. This structure is useful when you have many sales people dealing with the one organization, or more than one opportunity running with a contact. SalesAhoy has been designed for maximum flexibility.

1>Organizations are at the top level
2>Contacts belong to Organizations
3>Activities & Opportunities are connected to contacts

Step One –getting you users to come aboard
You'll need to start by creating your users.

Action: Go to the Below Deck area from Ahoy Today, click on Manage Users

Manage Users
This is where you will be able to add, edit or delete users, set and reset passwords, or change access levels for any or all members of your team.



From here you can also put people into teams.

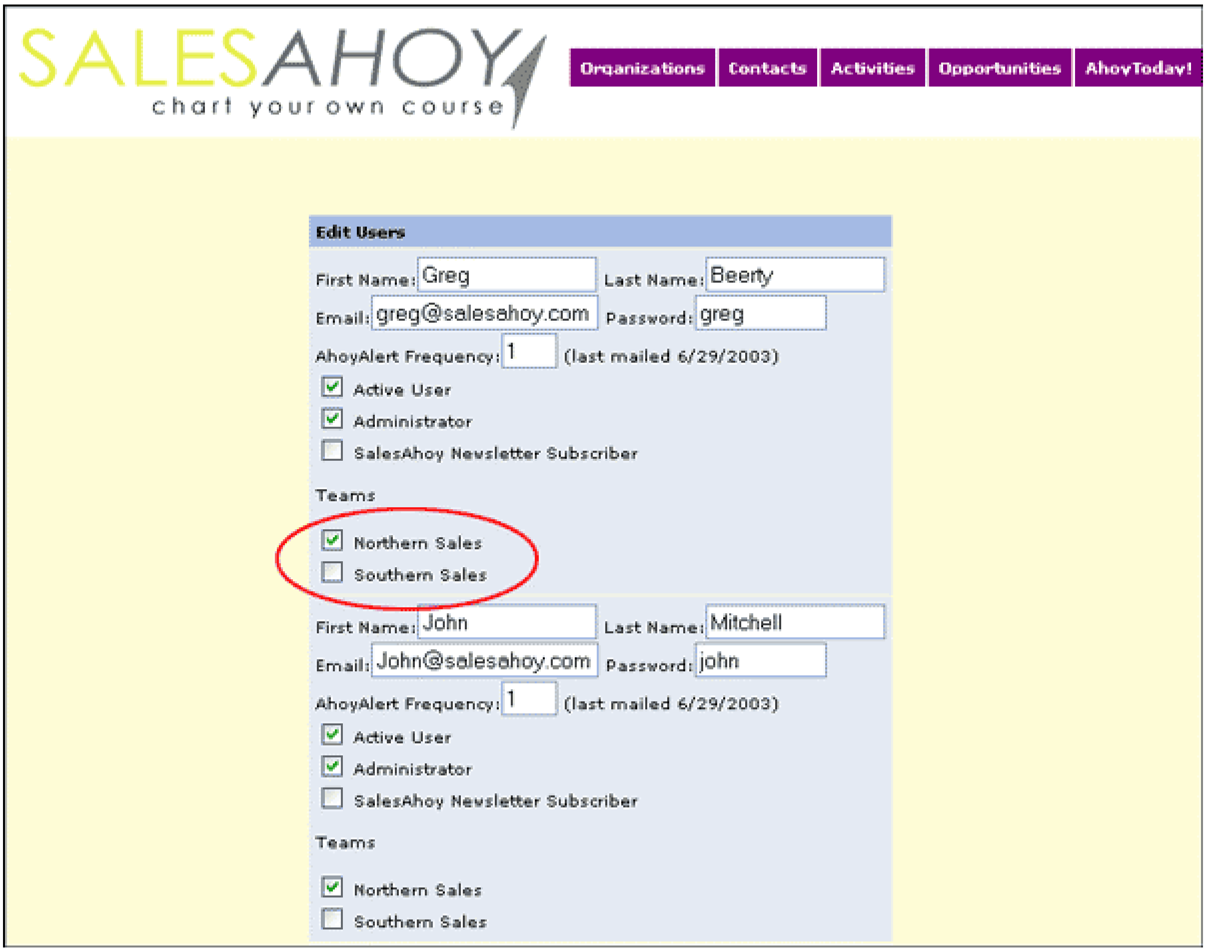
Action: Go to the Below Deck area from Ahoy Today, click on **Manage Teams**. You can create and edit teams directly from the AhoyToday page. Once you have created a team, as an administrator you'll have the option to assign users to the selected team. This means you can more easily manage your internal sales team, or external sales agencies and affiliates. SalesAhoy users can see their own records and the records of others in their team if you allow them to.

Tip for solo sailors!

For those users who are true solo sailors and will never need to see another users records, you can create their own team with a single member, or not associate them to a team at all.

"Teams" will allow you to have users see only their own records, or be part of a team, or many teams.

This is also the place where you will assign the email address and password used within SalesAhoy.



Your users can have a status of active user, and you can decide to make them administrators. A user with Administrator access can see everything, but a regular user will only ever see their details and password in the Manage Users area.

Private members
The other option you have is to give a user the status of "private member". A private member allows a user to belong to a team, and therefore have full access to the teams' records, but not be visible to any other members. This is typically used to " see" the performance of a team in detail, and is useful for management.

Step 2 - Change the System Terminology

Action: Go to the Below Deck area from Ahoy Today; click on Change the system terminology

On this screen you are able to put in your own company name, and if you have different terms you'd like to use for organizations, contacts, activities and opportunities you can change them here.

You might call opportunities deals or sales, or your company might want to re-name activities to events.

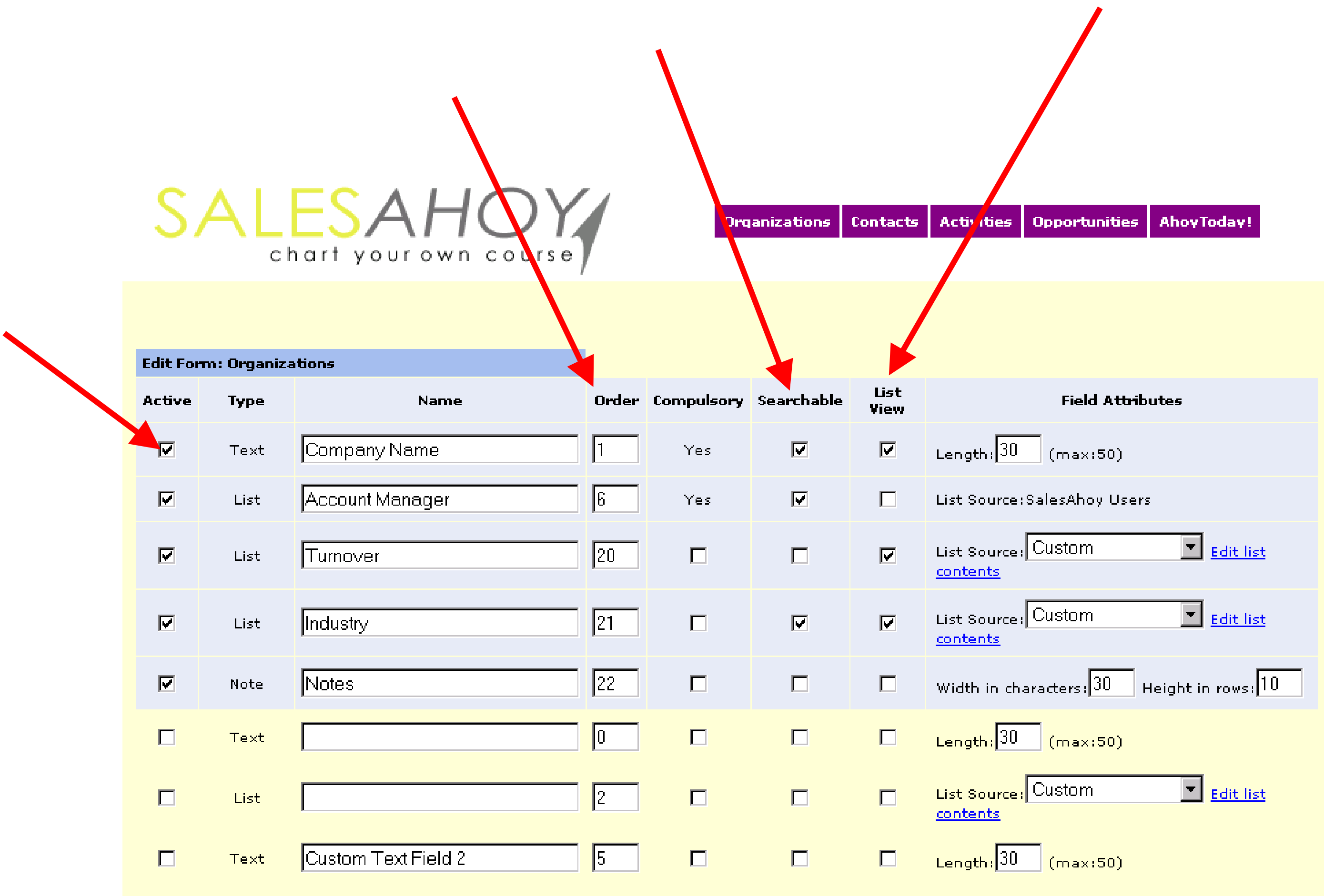
There's no restrictions, but remember that organisations are at the top level.

Step 3 - Change the forms, fields or labels

This is where you can really chart your own course.

Organizations, Contacts, Activities and Opportunities all have a form already created with some default terminology. You might like to delete some fields, or change them completely. You can always make a field inactive by ticking that option.

Editing the Organization, Contacts, Opportunities, and Activities forms uses the exact same process. You decide if your want fields to be active, which order you'd like them to appear in the detailed view of the record; if the field is compulsory; if you'd like to make it searchable in the FIND feature; and if you'd like it to appear in the list view that is returned after you do a FIND.



This is also where you re -label your field names and determine the type of fields you need for your records.

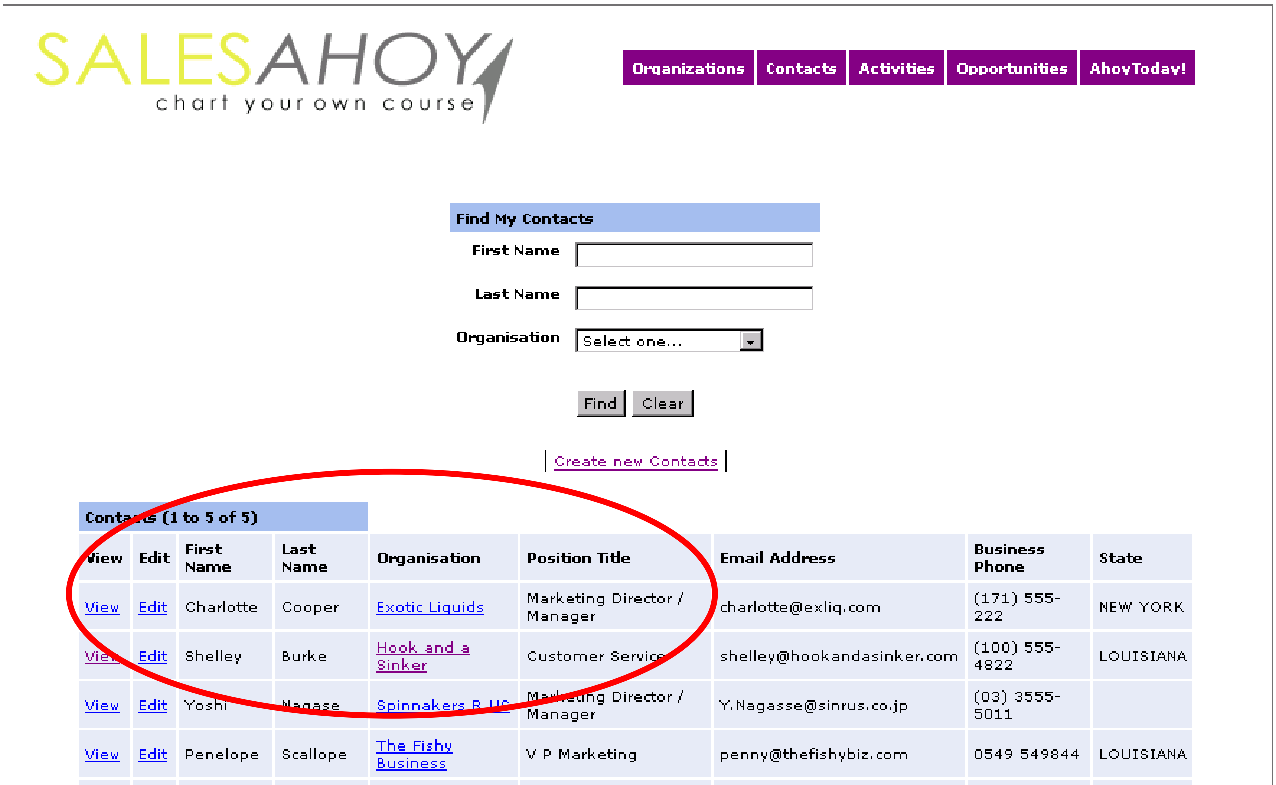
We've given you lots of options with text boxes, lists from which you can create multiple choice options, note fields, date fields, number and calculation fields.
You can nominate to have certain fields as compulsory, and determine what size and length you'd like the fields. If you need more fields of a particular type, just let us know via email.

Our best advice is to experiment. If you get stuck, just contact us and we'll give you a hand. It's designed to be very flexible.

Things to consider when editing your forms

List view

Ticking "List View" means you'll have the field appearing in the list of results after you do a "FIND". The list of records appears **before** you go into the detailed view of a record.



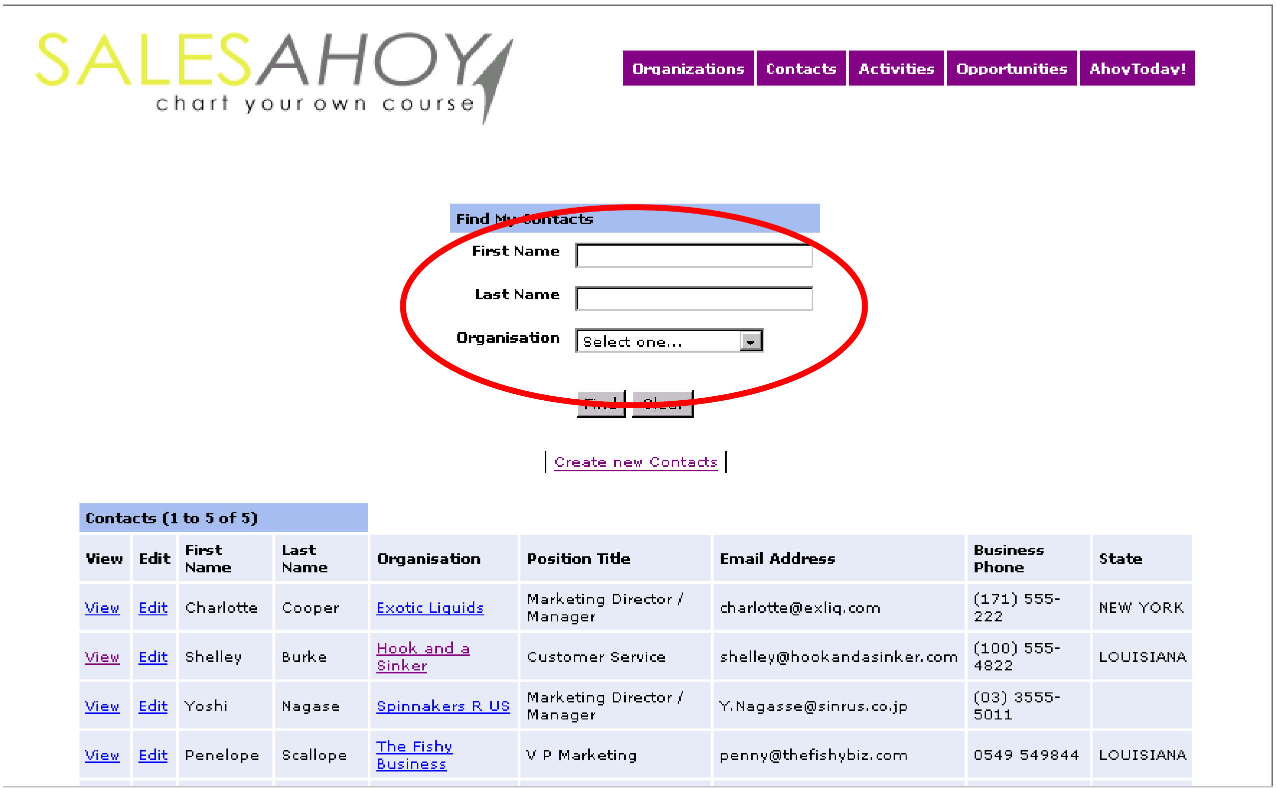
View	Edit	First Name	Last Name	Organisation	Position Title	Email Address	Business Phone	State
View	Edit	Charlotte	Cooper	Exotic Liquids	Marketing Director / Manager	charlotte@exliq.com	(171) 555-222	NEW YORK
View	Edit	Shelley	Burke	Hook and a Sinker	Customer Service	shelley@hookandasinker.com	(100) 555-4822	LOUISIANA
View	Edit	Yoshi	Nagase	Spinnakers R US	Marketing Director / Manager	Y.Nagasse@sinrus.co.jp	(03) 3555-5011	
View	Edit	Penelope	Scallope	The Fishy Business	V P Marketing	penny@thefishybiz.com	0549 549844	LOUISIANA

So you may not want to go overboard with this. Consider what fields you will want to see in your list view and remember that all the detail of each record will still be available once you View the record.

FIND

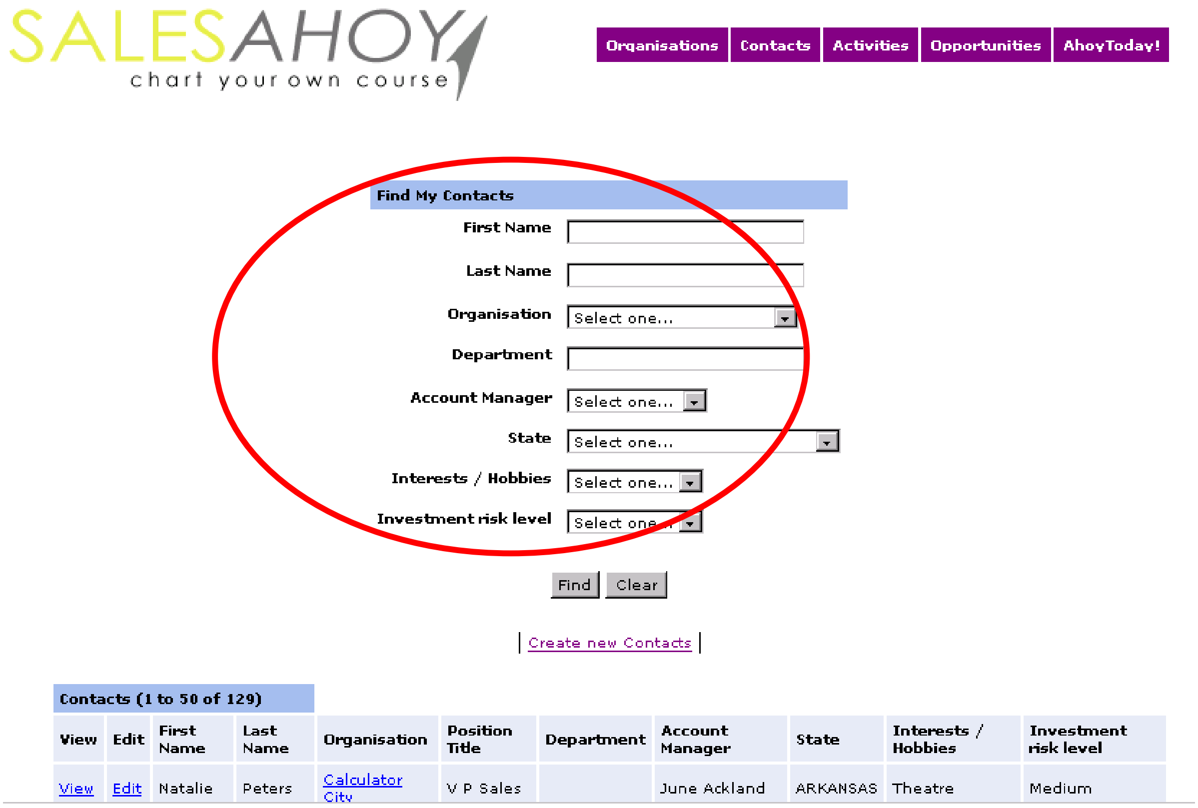
This allows you to make fields searchable. It may be easier to give your users simple criteria to search by, rather than lots of options that may be confusing. You might prefer to search for your contacts only by first or last name and organisation.

If so your FIND screen may look like this.



View	Edit	First Name	Last Name	Organisation	Position Title	Email Address	Business Phone	State
View	Edit	Charlotte	Cooper	Exotic Liquids	Marketing Director / Manager	charlotte@exliq.com	(171) 555-222	NEW YORK
View	Edit	Shelley	Burke	Hook and a Sinker	Customer Service	shelley@hookandasinker.com	(100) 555-4822	LOUISIANA
View	Edit	Yoshi	Nagase	Spinnakers R US	Marketing Director / Manager	Y.Nagasse@sinrus.co.jp	(03) 3555-5011	
View	Edit	Penelope	Scallope	The Fishy Business	V P Marketing	penny@thefishybiz.com	0549 549844	LOUISIANA

Or you may like a more detailed list view to appear like this.



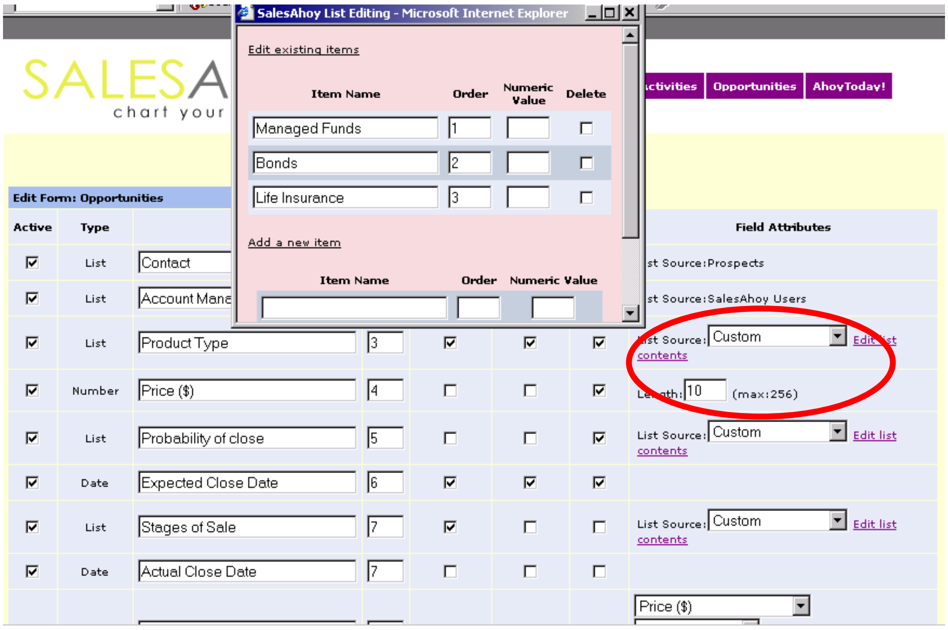
Having a more detailed FIND screen can be a fast way of getting instant insights, for example FIND can search for all opportunities, expected to close within a date range, that have a status you nominate and an interest in a specific product.

Compulsory

Again, just tick the fields you really want your users to have to fill out.

Making lists for multiple choices

If you decide you'd like a drop down box of multiple-choice options to appear as a list, you can select from some exiting list sources like the list of Contacts or Organizations you have already created, or your SalesAhoy users. Making new choices is simple.



Action: After selecting a Custom list, select edit list contents

You type in the name of the item, nominate what order you'd like each item to appear and if you want to assign the item a numeric value.
To delete an item tick the delete box.

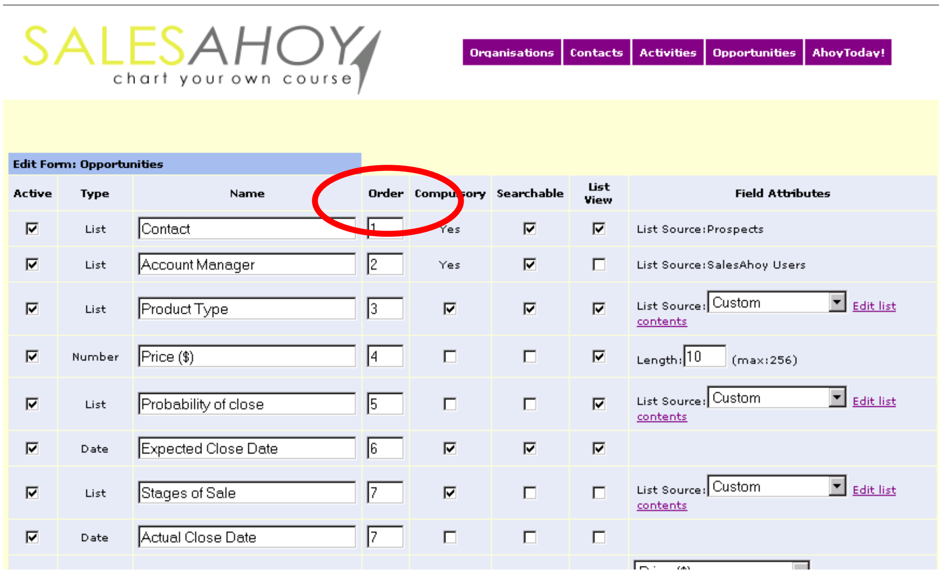
Ordering your fields in the detailed view

Once you have decided on all the fields you want, you can determine the order you'd like each field to appear in the detailed view.
Here's a detailed view of an opportunity record.

View Opportunities	
Contact:	First Name: Natalie Last Name: Peters Organisation: | View detail | Position Title: V P Sales Department: Account Manager: June Ackland State: ARKANSAS Interests / Hobbies: Theatre Investment risk level: Medium | View detail |
Account Manager:	June Ackland
Product Type:	Bonds
Price ($):	25110
Probability of close:	100%
Expected Close Date:	16-Jan-2003
Stages of Sale:	Waiting for Decision
Actual Close Date:	12-Feb-2003
Forecast Income ($):	25110
Lead Source:	Cold Call
Notes:	Very postive.
Status:	Sold

| Edit this record | Delete this record | Create new Opportunities | Change this form |

The order these fields appear in can be changed by clicking on "Change this form", and then re-numbering the boxes next to each field you have created.



Edit Form: Opportunities

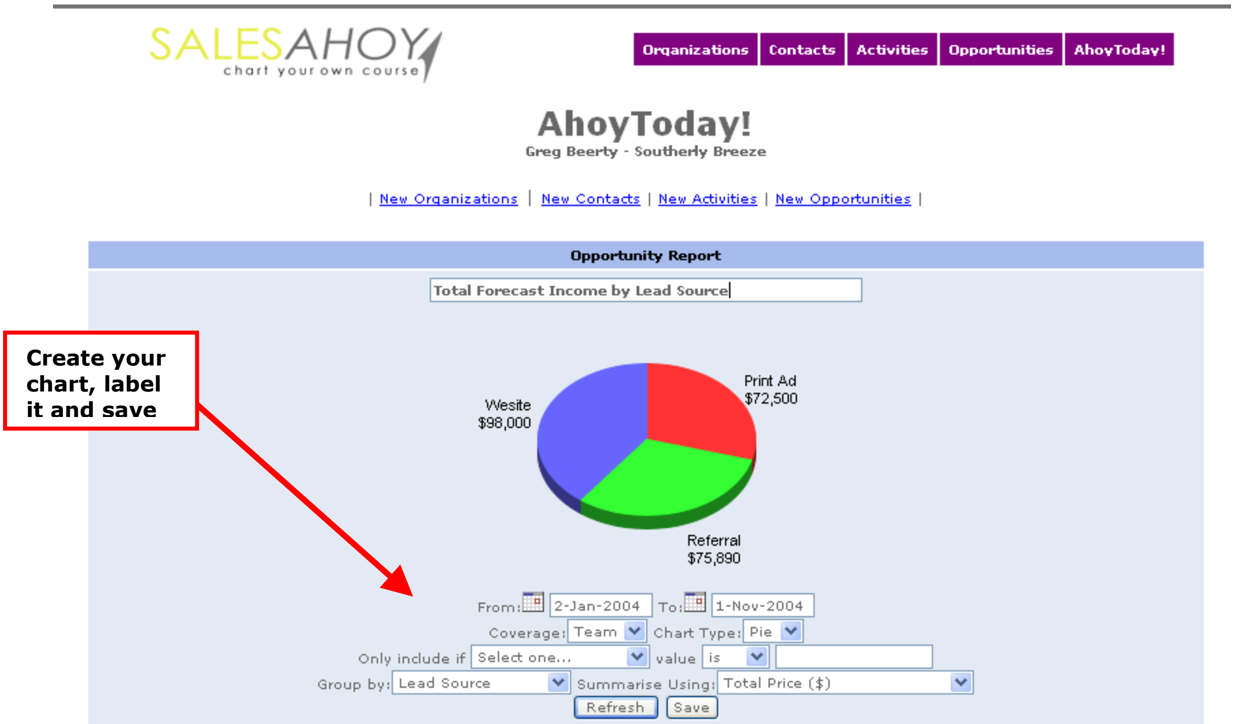
Active	Type	Name	Order	Compulsory	Searchable	List View	Field Attributes
☑	List	Contact	1	Yes	☑	☑	List Source:Prospects
☑	List	Account Manager	2	Yes	☑	☐	List Source:SalesAhoy Users
☑	List	Product Type	3	☑	☑	☑	List Source: Custom Edit list contents
☑	Number	Price ($)	4	☐	☐	☑	Length: 10 (max:256)
☑	List	Probability of close	5	☐	☐	☑	List Source: Custom Edit list contents
☑	Date	Expected Close Date	6	☑	☑	☑	
☑	List	Stages of Sale	7	☑	☐	☐	List Source: Custom Edit list contents
☑	Date	Actual Close Date	7	☐	☐	☐	

Because Opportunities always belong to Contacts, the Contact record will also be included and displayed inside your Opportunity record. In the same way you can also access the more detailed Organization record from within Contacts.

Step 4–Charts & reports

There's a simple charting / reporting feature which enhances your AhoyToday page. It's designed to be very flexible and will give you a quick snapshot view of your sales opportunities. You'll be able to get a graphical pie or bar chart view of your opportunities over a date range, and there are many options available when deciding how your results will be grouped and summarized.

- See what's been sold from lead sources over time
- Compare the success of various products
- Understand where in the pipeline your opportunities are
- Contrast the lost opportunities to those you have sold
- View how many opportunities are with each of your contacts



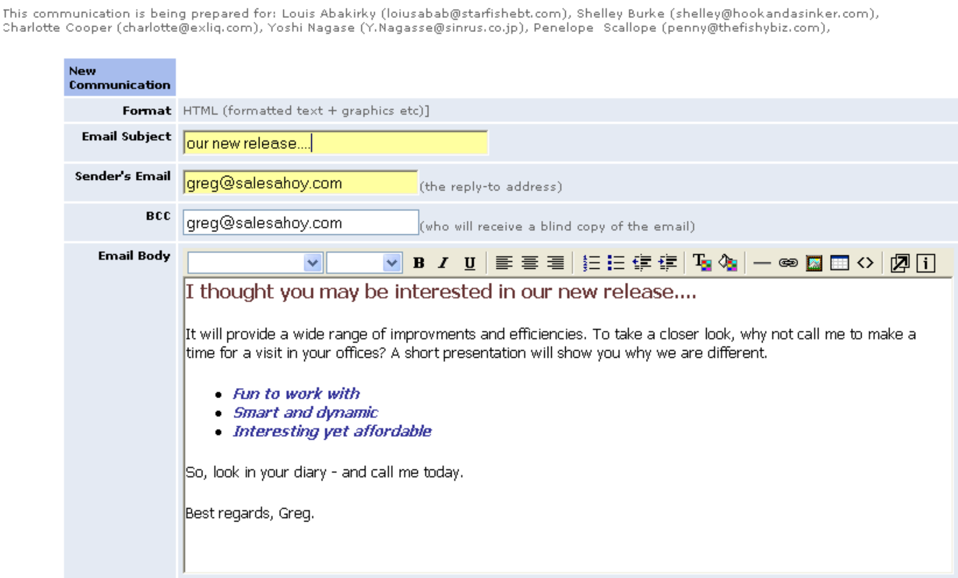
Here are some things to consider when you start using the charting feature.

- You have the option to filter your results. This is very useful when you want to only include "open" sales when looking at what's in your sales pipeline. You can include or exclude almost anything to get a really clear view of your pipeline or sales opportunities. Select from the drop down and type in the value you want to exclude or include.

- The flexibility of Charting means that it will work for all our customers, no matter how has much customization has been done. This also means some charting combinations that you search for are simply not valid. When this happens, you'll see a message from us. Experiment and of course, drop us a line if you have questions.

Step 4–Communicate with our HTML email editor

There is a simple html editor for the email "communicate" feature which makes creating html email easier. It will allow you to control the HTML layout of the emails including fonts, colours etc.
It's a simple WYSIWYG editor that you'll be familiar with. You will also still have the option of sending email in plain text.



An activity is created & recorded against the nominated contact(s) you are sending the email to.

We're committed to keep improving and learning and we really value your feedback and suggestions. You already know we're not in a features race with other more complicated CRM systems and we will continue to try to keep SalesAhoy simple, clean and easy to work in. If you have questions, or want specific help in customizing SalesAhoy, we'd be very pleased to help in any way we can.

We also offer a full customization set up support service for $499.00 if you would prefer to leave it up to us.

Smooth Sailing!

support@salesahoy.com