Configuration Packet

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Configuration Packet

Getting Started

Logging In

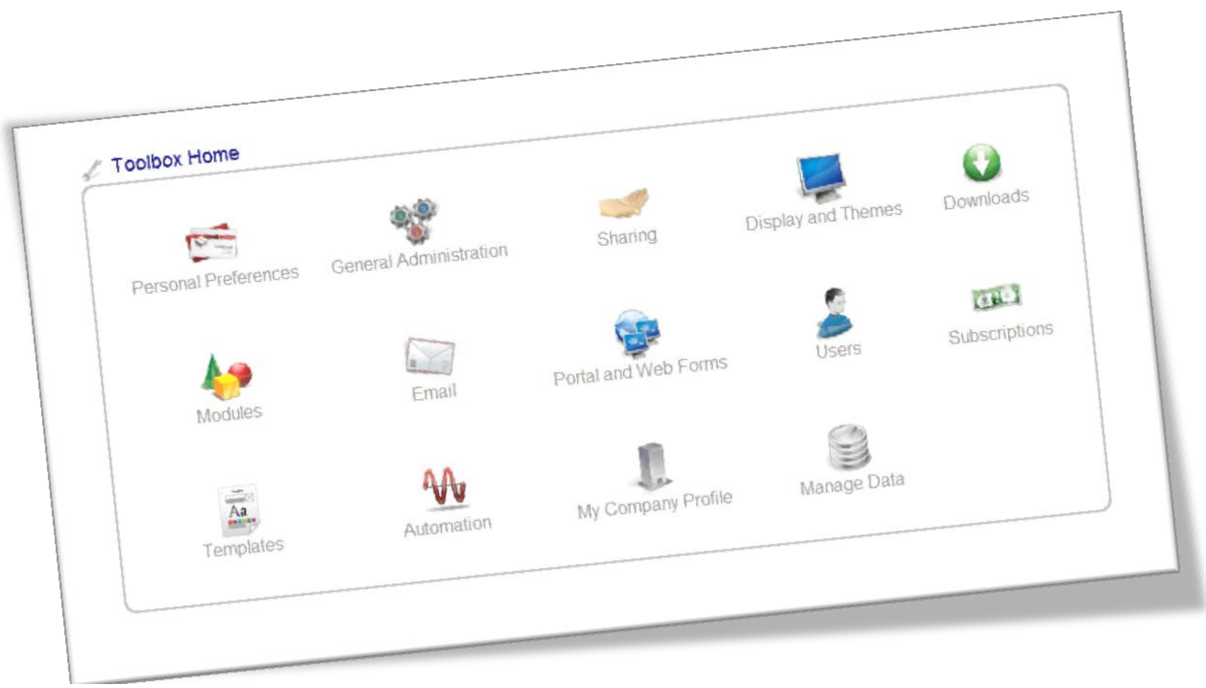
Once you receive your confirmation e-mail from eSalesTrack after signing up for a new account, you can use the credentials sent to you to login.

Navigating eSalesTrack

Once inside of your eSalesTrack account get familiar with where things are located and common administration controls. Click the question mark ( ) in the upper right hand corner of the page to browse eSalesTrack help articles.

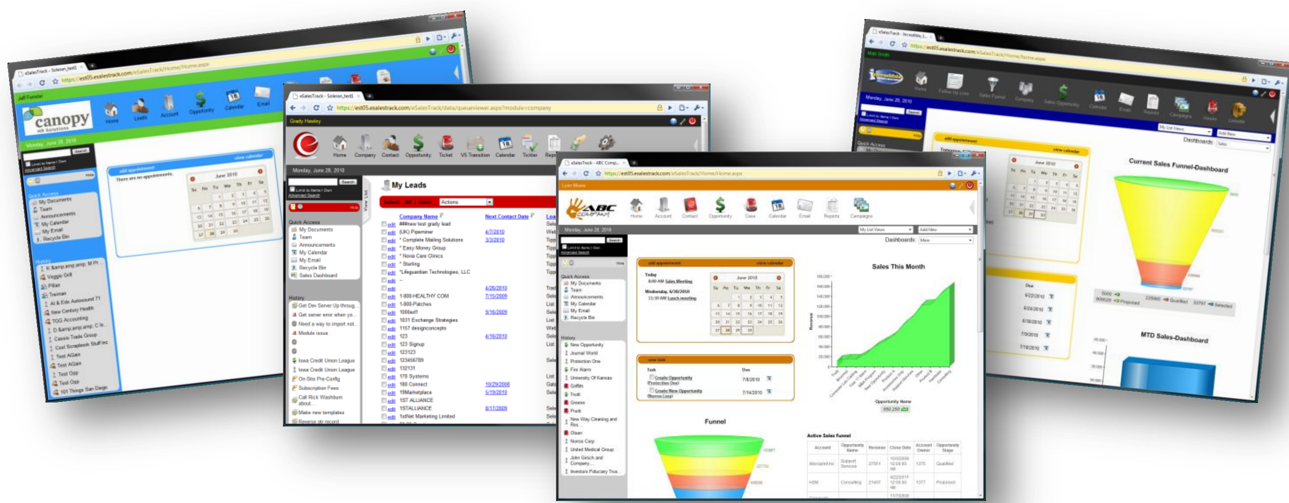
Get Familiar with the admin panel

There's a lot to navigate through in the Toolbox, found by click clicking on the wrench in the upper right corner of any page of the application. The toolbox contains all the tools you will need to setup and customize your eSalesTrack account. DON'T TRY TO DO TOO MUCH TOO FAST! You will be able to learn just the things you need as your implementation progresses. We have made it easy with point and click icons that will navigate you directly to where you want to be in a few short clicks of the mouse.



Start to Personalize

You can click on the Display and Themes icon in the admin panel to navigate to the place that will allow you to change the look and feel of eSalesTrack to match your company's colors and design.

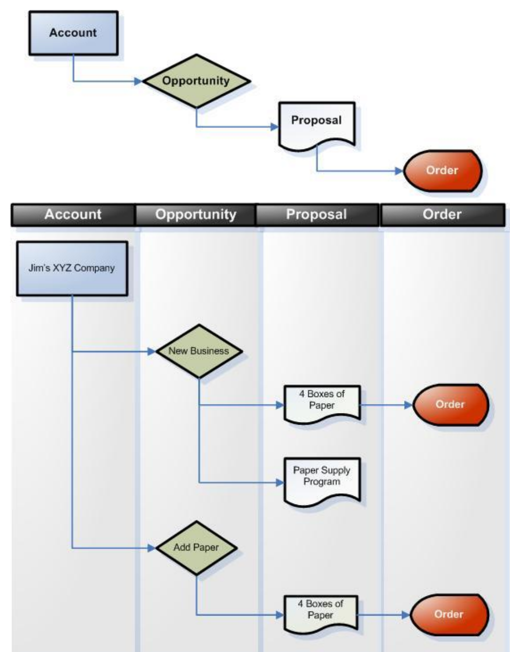


Workflow Design

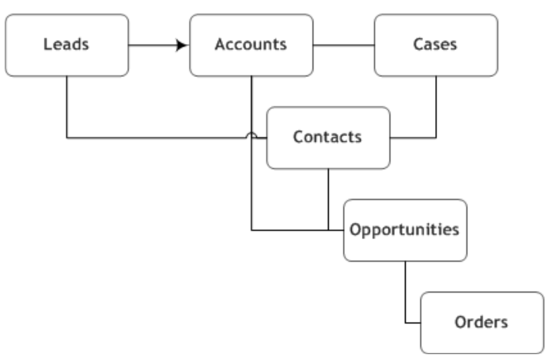
Draw out your workflow

You are almost ready to start building out customized forms and modules in eSalesTrack but be sure to do the next, very important step of taking some time to design the right workflow for your companies needs. How you set up your eSalesTrack account will be based on the workflow of your company. Some simple examples of workflow design are below. There is space provided at the end of the packet to draw out your workflow. Think through how you will be getting leads into the system whether it's from lead lists, eSalesTrack integrated web-forms or just manually entering new information into the system all the way to the end of the sales process. A little extra time on this step will potentially save you some time as you are building out the rest of the system.

Here you'll see the concept of what designing your workflow entails. This is the simply process of allowing one Account (or whatever you call them) to have multiple sales Opportunities, to many Proposals, to one Order (or however you want the workflow to go).



Next, use the following sheets to lay it out on the grid provided in a similar format to what your process follows.



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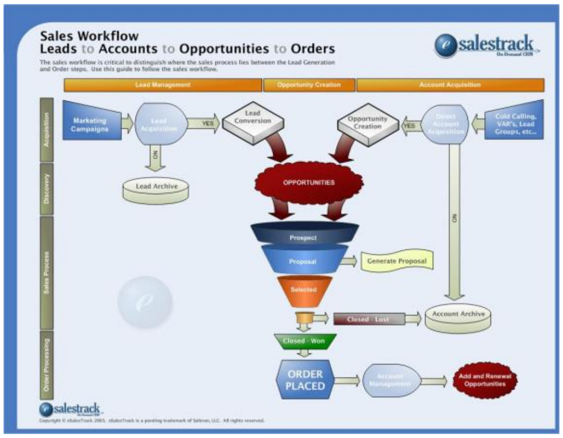
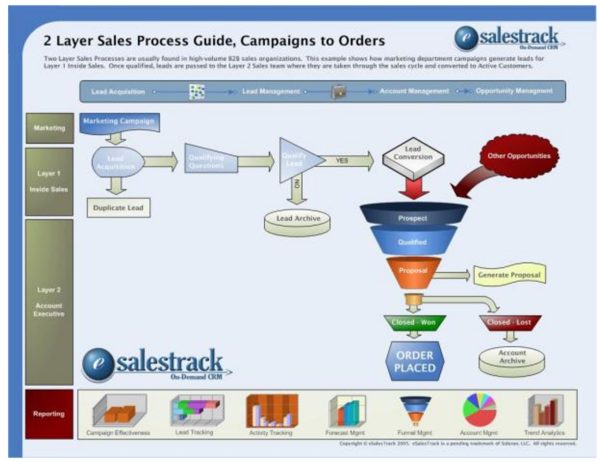
Examples of Workflow

Here's a couple sample detailed graphic workflows to help you along the way. Just ask your rep for PDF's of these workflow samples for greater detail. They can also be found in the help menu system.





Template accounts

There is always the option of using a template account that has already been set up. There are a few template accounts that are available when you sign up for eSalesTrack. You can find a description of these accounts in the help menu. There are advantages and disadvantages to using a template account. The advantage is the set up work is already done for you. The disadvantage is that it will not be customized to your workflow. However, even if you select a template account you can still add custom modules and custom fields, so it might be a good place to start.

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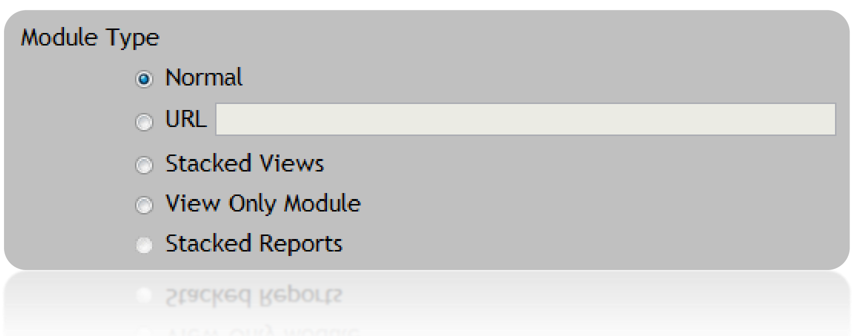
Modules

Once you have your workflow drawn out it is time to start creating your modules, fields, and relationships.   We would highly recommend having an eSalesTrack configuration specialist help you with this step to make sure your account will be set up correctly. eSalesTrack offers various set up and configuration packages and can make sure your workflow is set up properly.

If you decide to do some or all of the set up yourself then eSalesTrack has some resources that can help. However, eSalesTrack cannot guarantee your account will be set up properly if you do not choose to go with a set up or configuration package.

Creating Modules

1. Click on to open the tool box, click on Modules, then click on Add Module.
2. Type in the Module Name (in the singular and plural), then type an internal description.
3. Choose the normal module type. A normal module is a database module that you can add fields and records to.   These are the type of modules you have laid out in your workflow design.



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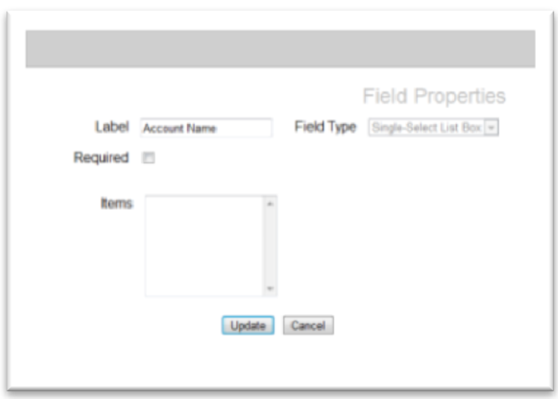
Fields

Once you have created a module you will be directed to the field creator. Here you will want to think through every single piece of data that you would like to collect for your modules. Make sure to select the field type before you move to the next step as your options will be limited once you save the fields and their field types.

Creating fields

1. Type the name of the field you'd like to create into the New Field Label box, and hit "Enter". The new Field will appear in the gray box below, and the name will be in blue.

3. Once the field is created, You can choose the Field Type (i.e. Text Box, Email, Phone, Drop-Down, etc.) Clicking on the "Required" box will require that field to be filled out in order for the form to save.
4. To fill in the possible selections for a Drop Down, Single or Multi Select List Box, etc. , click on the Field Label and type in the options into the "Items" box.



5. Click "Update" and you will be re-directed automatically to the Form Manager page.

Field Creator

If you need to go back at any time to edit fields or create new fields just follow these steps:

1. Click on to open the toolbox. Click on Modules, then click Field Creator.
2. Click on the Module under which you want to create the field (i.e. Account, Contact, Opportunity, etc).

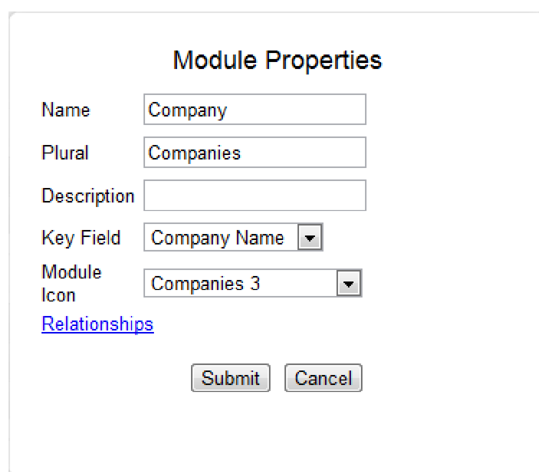
Forms

Once you save your fields in the field creator you will be directed to the form manager. Here is where you will set up the physical layout for your fields as well as any extra controls you would like to have on the record page.

Form Manager Layout

Module Properties

This is where you can edit the properties of the module such as; name, key field, icon. YOU MUST DEFINE A KEY FIELD THAT IS NOT THE RECORD OWNER. The default key field is record owner, but you must change this to another field. You will want to select a field that will have unique values in it such as; company name, last name, subject, etc.



Additional Layouts/ Web Forms

This is where you can create additional form layouts and also create and get the html code for web forms. Additional layouts can be assigned to roles in your account so different uses can see different information.

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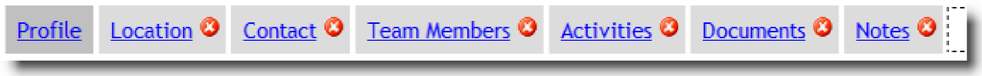
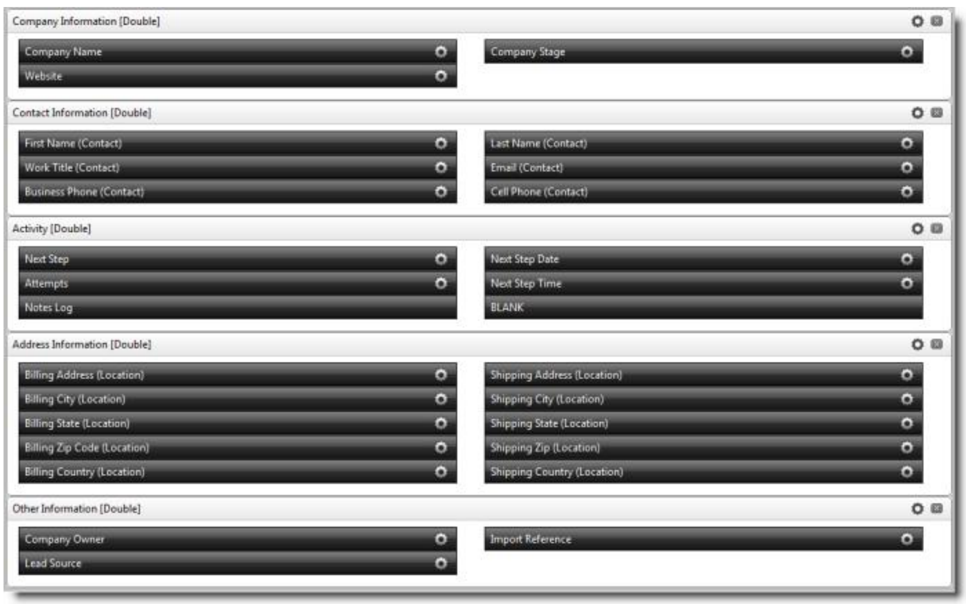
Tabs

Tabs can be added to layouts to display related information about records.



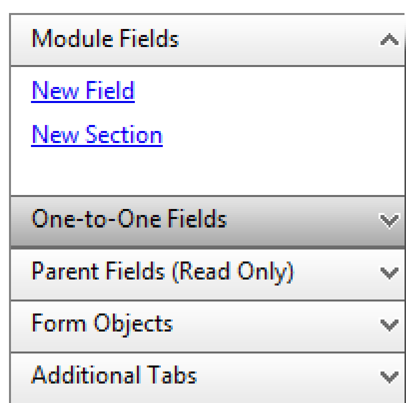
Form

This is the current form layout, you can add fields and form objects by clicking and dragging them onto this layout.



Fields and Form Objects

This consists of the current module fields, related fields, parent fields, as well as form objects such as; notes, content, blank spaces, and scripts. You can also create new fields and layout sections here.



If you make any changes to the form layout make sure to click "Save Form Layout" when finished.

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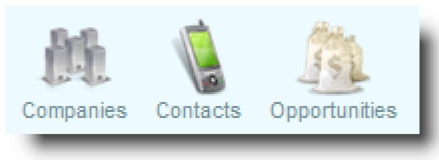
Edit the Form Layout

If you need to get back to this page to edit the form just follow these steps:

1. Click on the toolbox .
2. Click on modules .
3. Click on Form Manager .
4. Click on the module that you would like to edit the form manager for.



Converting Records between Modules

If you have any modules that you will need to convert records in between, for example converting leads to accounts, you will want to set a mapping up.

Mapping

Mapping creates conversion between two modules. You can map the fields of two modules and convert records from one module to the other.

To set up a map

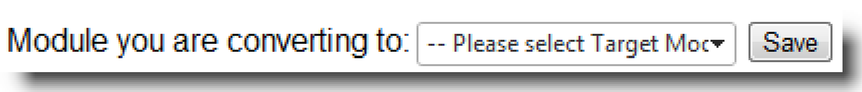
1. Click on the wrench .

2. Click on Modules .

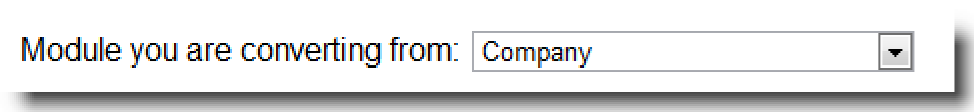
3. Click on Mapping .

4 Click on Add Map .

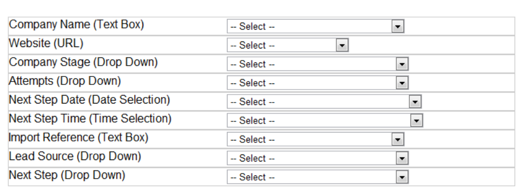
5. First pick the module you would like to convert to from the drop down menu.



6. Next select the module you would like to convert to inside of the first tab.



7. Map each field by selecting fields from the drop downs. The information will move from the fields on the right side to the fields on the left side when you convert a record.



8. You can map information from related modules by clicking on the tabs. The tabs are the modules that are related to the module you are converting to. You can select modules that are related to the module you are converting from and map the information between the two.

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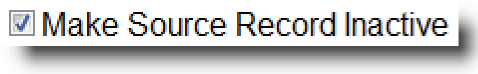
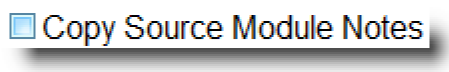
9. If you would like the old record to become inactive you can click the "Make Source Record Inactive" check box.



10. If you would like any notes from the Notes Log associated with the original record to be copied to the new record then click the "Copy Source Module Notes" check box.



Roles

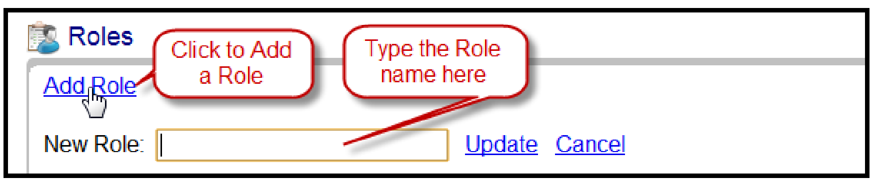
Add permission roles to the system so you can allow different groups of users different permissions as they each will use the system in different ways with different permissions. Navigate to the Toolbar, click users, and then Roles to start adding your roles anytime you want.

Add Roles

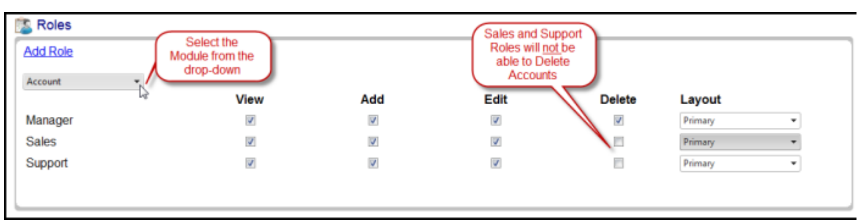
eSalesTrack allows you to add roles to your company profile so that you can restrict a user's permissions based on their role. You can assign permissions to roles and assign roles to users/ team members.

To Add/Manage Roles

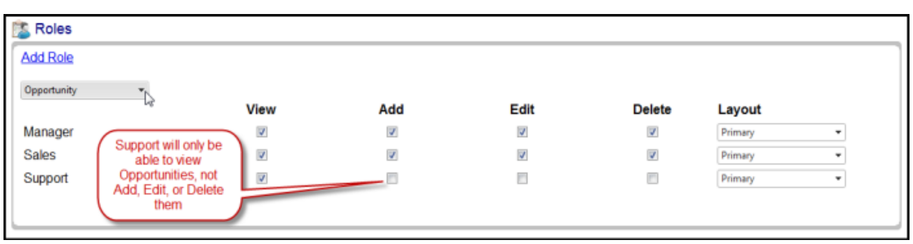
Click on the Toolbox icon  in the upper right corner of the screen, then the Users icon , and then the Roles icon .
The Roles Management page is displayed using which you can create roles, edit roles, delete roles, and assign module permissions to roles. Click on the Add Role link at the top, type in the new Role name, and click Update to save the new Role.



To set the parameters for a Role, select the module from the drop down, and click which permissions that specific Role is to have.

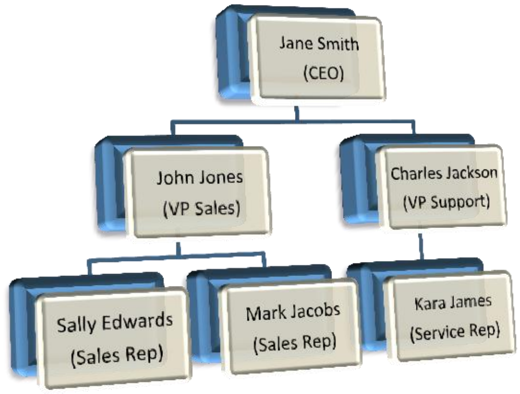


As another example, for the Opportunities Module Sales and Manager roles have full permissions whereas Support can only view Opportunities:



Changes are automatically saved on this screen.

Users



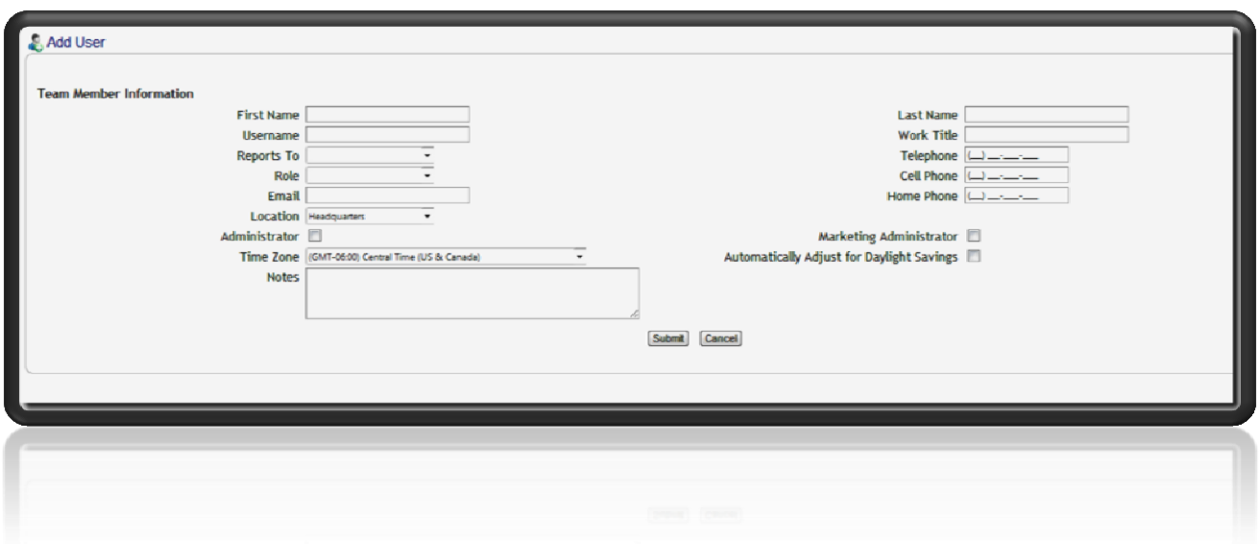
You will want to draw out a quick hierarchy of the employees that will be using the system. This will help you when adding new users. Users at the top of the tree will have visibility to information and activity of users that repot to them.

Adding users

The next step is to add your users to the system. You will need some basic information about the individuals that will use eSalesTrack like; name, email, and desired username.

To add your users

1. Click the Toolbox icon , then the Users icon , and then Add User icon .
2. Enter as much user information as desired. You must enter; name, email, and desired username. Here you can also assign roles as well as build the team hierarchy by using the “Reports To” fields.
3. Click “Submit” and you will be re-directed to the Manage Users page and the new user will be visible. This will also send an email to the user with their username and password.

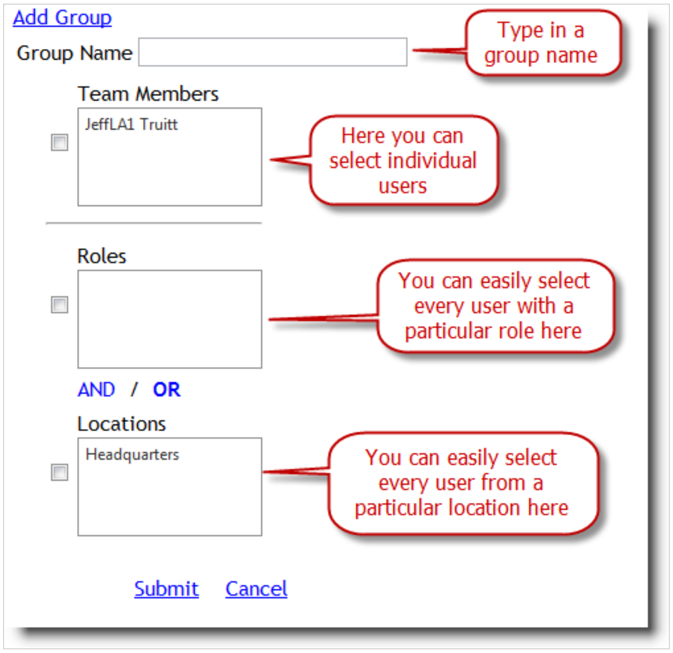


Sharing Information

Once you have added all your users you will need to think through which users will need to share information, if any. Remember that a user will have access to see any information owned by users that report to them. If additional visibility is needed then you will need to set up sharing.

Sharing can be set up within a group. Once the group is set up you can enable sharing for that particular group. All users in the group will have access to any records owned by users in the group, once sharing is enabled.

Creating the Group



1. Click on the wrench .
2. Click on users .
3. Click on Groups .
4. Click Add Group.
5. Type in the Group Name
   - In the **first box** you can click the check box and select individual users. If you need to select more than on then hold down Ctrl and click all the names.
   - In the **roles box** you can select users by role. If you select a role every user who has that role will be in the group.
   - In the **locations box** you can select users by locations. If you select a location then everyone at that location will be in the group.

6. Click Submit to save.

Sharing

Once the group is set up then you will need to enable sharing for that group.

To enable sharing

1. Click on the wrench.
2. Click on sharing
3. Click on Module Sharing.
4. On this page you will see a list of all the modules in your eSalesTrack account. Next to each module you will see a check box for each group that you have created. Check the box next to the group name to enable sharing for that module. Example, check the box next to the "Sales" group in the "Contact" module to allow all user in the Sales group to share Contact records.

Getting Familiar Using eSalesTrack

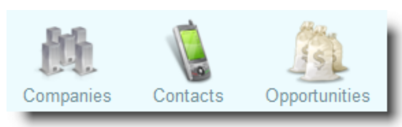
Now your account is set up you can begin getting familiar with using eSalesTrack. You may want to check out the getting started guide for users.

Setting up views – copy/force publish

Setting up views is an important part of your CRM. Views are created in modules and are simply lists of data contained in that module. You can create different views to show the information that you need to see. You can learn how to make a view in the getting started guide for users. We recommend that you create views for all of the users in your account. We have put some tools in eSalesTrack that makes this very easy to do. Once you have created a view you can copy that view to every user that you have set up.

To copy views

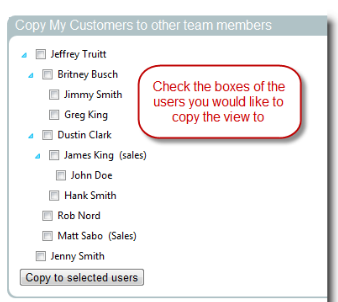
1. Click on the module where the view is that you would like to copy.

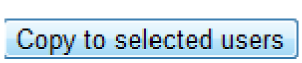


2. Click on Manage.

3. Click copy on the same line as the view.

4. Check the boxes next to the users that you would like to copy the view to.



5. Click 

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Dashboards

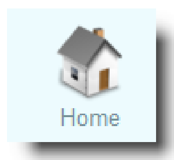
You may want to set up dashboards for you users on the home page. Dashboards are just collections of widgets, or visual displays of your information. You can create dashboards in one account and publish them so all your users can have access to the dashboard.   Check out the getting start guide for users to see how to create dashboards.

Publish Dashboard

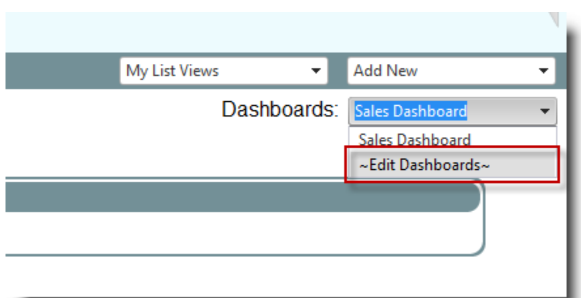
If you have a dashboard in your account that you would like other users to have you can publish the dashboard. The user can then go subscribe to the dashboard and they will then have that dashboard available to them.

To publish a dashboard

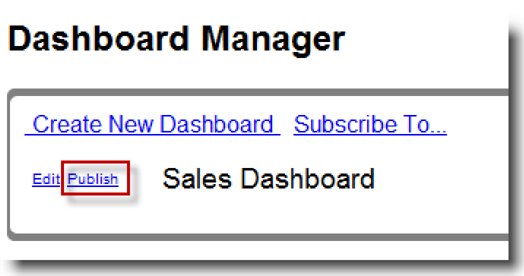
1. Click on the home module.



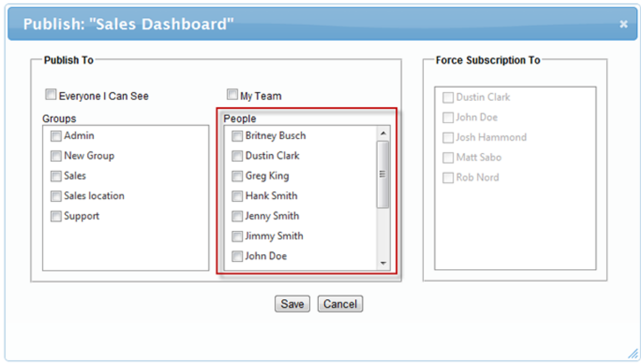
2. Select "~Edit Dashboards~" from the Dashboards drop down.



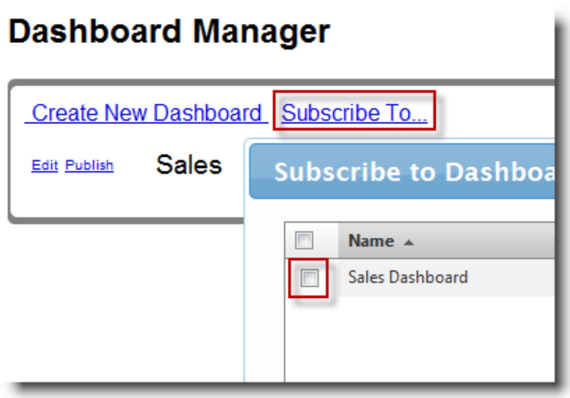
3. Click "Publish" next to the dashboard that you would like to publish.



4. Check the boxes next the users that you would like make the dashboard available to.



5. The selected users will now be able to subscribe to the dashboard.

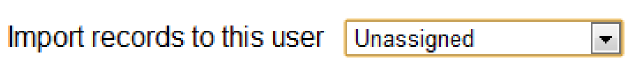


Importing

Now you are ready to import your data. You can import any data that you have in an Excel 97-2003 or CSV file. Before you import you will want to make sure you have fields set up for all of the information in the spreadsheet.

Import your Data

1. Click on the icon in the upper right corner of the screen.
2. This opens the Toolbox landing page displaying the various options available to you. Select Manage Data by clicking on it.
3. This takes you to the Manage Data landing page which displays the various options available to you. Select Import Data by clicking on it.
4. This takes you to the Import Data landing page which displays the modules for which you have the ability to import data. Select the module that you would like to import data into.
5. This takes you to the Normal Import Page. On this page you have the option to select the Advanced Import Page. The only difference between the two is seen between steps 13 and 15.
6. For the normal import, click on the Choose File button. Then select the file you want to import from your hard drive and click on Open.
7. Next to the Choose File button, the name of your spreadsheet will appear. To import that spreadsheet, click on Upload the selected file.
8. This will take you to the Normal Mapping page. You can choose to import records as unassigned, to a certain user, or select "Record Owner Column" if you have a column in your spreadsheet with record owner names or usernames.



9. You will see the column headers from the spreadsheet you uploaded. The drop downs on the right side will contain all of the fields from the module you have selected to import to. Line the columns up with the corresponding fields.

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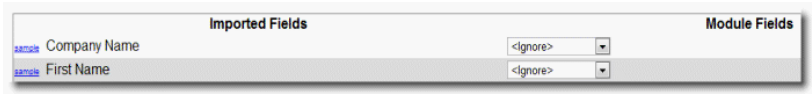
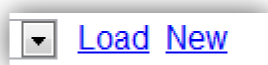
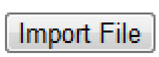


10. If you are doing an advanced import the two columns will be switched. The module fields will be listed on the left and the fields from the spreadsheet being imported will be in the drop down boxes. The mapping process only differs by the fact that the two columns are switched.

11. Once you finished mapping all the fields, go back to the top of the page, select New, enter the name you want to save the map as, and click Save to save that map. The save and load section allows you to either save the mapping that you do on that page or load a previously saved map if you are importing data similar to a previous import.



12. Once it is saved, click on 

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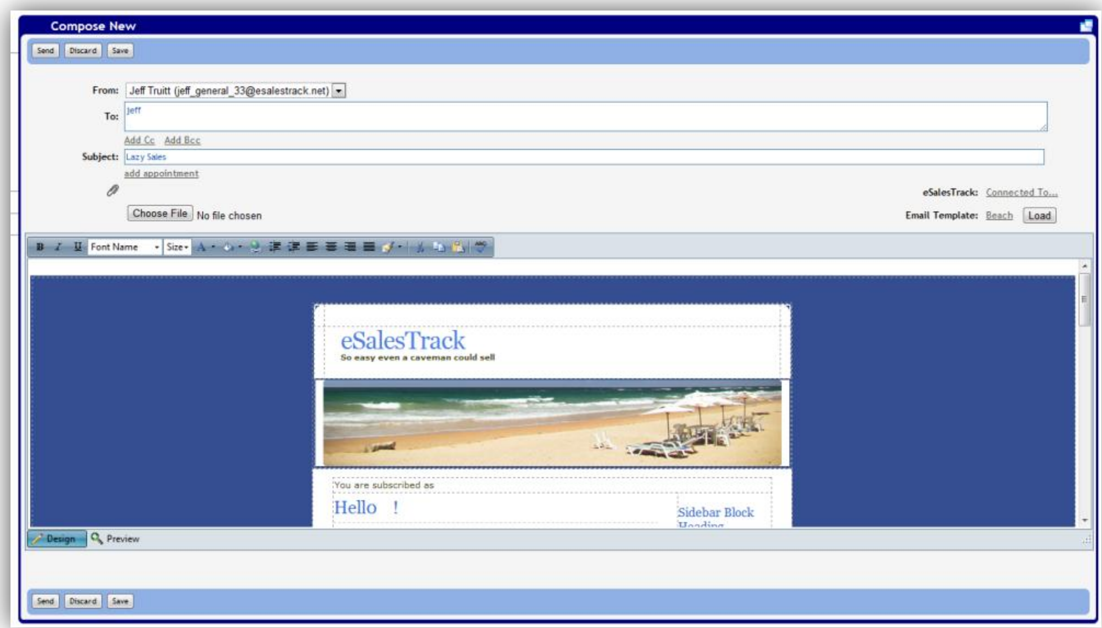
13. You can check the status of your import by clicking on the  icon in the top right corner, then clicking on  manage data then clicking on  Import Data and then clicking on the Import Log.

If you are having problems importing then you may want to check out the:
[Import Troubleshooting Page](#).

Setting up email

There are three different options for managing email with eSalesTrack. Users can use their default email application like Outlook to send emails with. Users can also use the eSalesTrack email application included with their subscription. All users in eSalesTrack are provided with an email address that they can send and receive emails with in their eSalesTrack account. To see how to set up the email this way check out the quick start guide for users.



Training Users

Now you have set up your eSalesTrack account you will want to start training your users. There are lots of resources that eSalesTrack provides to help your users learn how to use the system. Here are a few:

eSalesTrack Help Website

You can get to the help website by clicking the blue question mark in the upper right corner of the page or by going to http://www.esalestrack.info/. Here you can find training videos and articles that wil help you use eSalesTrack.

eSalesTrack Daily Webinars

eSalesTrack offers daily training webinars. The topics for the webinars are different everyday of the week. You can find the agenda for the webinars on our help website. You can sign up for the webinars by emailing training@esalestrack.com.

Custom Training

eSalesTrack offers custom one-on-one training for a reasonable price. Email training@esalestrack.com for details.

eSalesTrack Getting Started Guide for Users

This document takes you through the basics of using eSalesTrack. You can find this on our help menu.

You're almost there!

There are many more options you can take advantage of after these basics are in place. Be sure to read through the extensive help menu and join us for our free daily webinars which will go through the advanced options that are available to you through eSalesTrack.

We can help!

If this process seems a little overwhelming please remember that we can help every step of the way. Just call your account representative and they can talk to you about our comprehensive set-up and configuration services available to make sure the system is set-up just the way you want it. Our team has years of experience in designing custom fit CRM solutions for every business.

Getting the right start is important to save you time and money and get your organization using the most comprehensive CRM available on the market today.

Give us a call or send us an email using the information below. Let us know how we can help!

1.866.765.4CRM (4276)

sales@esalestrack.com

training@esalestrack.com

Thanks for using eSalesTrack!