# Quick Start Guide for Users



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Getting Started Guide for Users





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## 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. You can login from the eSalesTrack website (www.esalestrack.com).

### Change Password

1. Click on Admin Toolbox.

2. Click on Personal Preferences.

3. Click on Change Password.
4. Enter your old password, then enter your new password twice. Your password must be at least 6 characters long.


### Edit Information

You can store your personal information in eSalesTrack, seen only by other users in your account. The personal information consists of your name, contact information and bio-data. Only the fields in red are required, all other fields are optional. You can enter as much or as little information as you want.

To Edit Personal Information

1. Click on the icon in the upper right corner of the screen. This will open the toolbox.

2. Click on the Personal Preferences icon.

3. Click on the Edit Information icon.

4. This takes you the Edit Information page where you can edit the information you entered while signing up for your eSalesTrack account. All information is optional except the First Name, Last Name, email and Work Phone number. All the information you enter can be seen by the other members of your team.

5. Click Submit to save changes.



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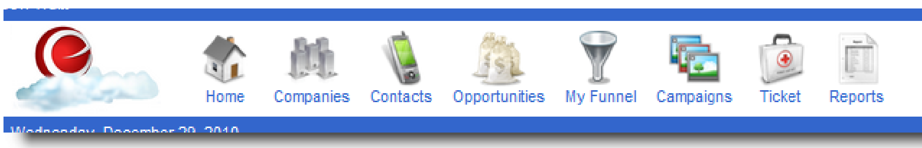
## Home Page

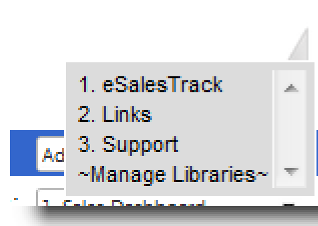
The home page is the first page that comes up when you sign into your eSalesTrack account. You can also get to the home page by clicking on the icon. This page includes widgets, or visual summaries of the most immediate items pertaining to the data in your eSalesTrack data. There are all different types of teasers and reports that you can create to have important information readily available.

### Libraries

In eSalesTrack you have the ability to select different Modules displayed in the Module tool bar or Library. You can arrange them however you feel is the easiest display for you to work with.

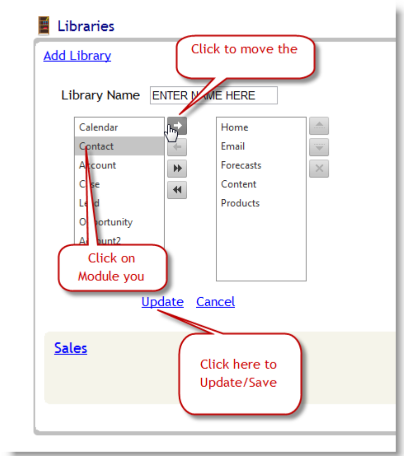



1. To get to your Library click the open menu at the top of the right hand corner and your library tab will open. Then select the Module Library you want or ~Manage Libraries~ to rearrange or create a new Library.



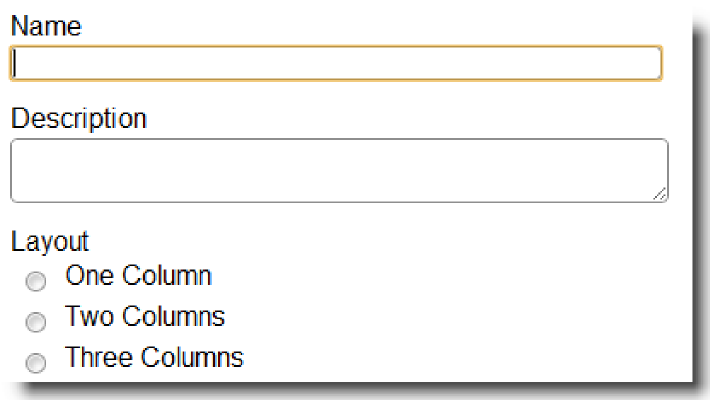

2. Once you sign in you will see your new the Libraries you have already created and their contents. Click on the name of the Library to edit it, or Add Library to create a new one.

3. Once you have got into your New Library, simply add the name, select and click the right over arrow to move them into the Library. Once arranged, click Update and your new Library will be created.




## Dashboards

In eSalesTrack, you have the ability to have multiple dashboards as the main screen for your Home Page  . The dashboard is all of the area to the right of the left sidebar and below the library.




1. To initially create a dashboard, select the drop down box at the top right corner of the screen labeled Dashboards. Select ~Edit Dashboards~ from the drop down menu.

2. This will bring you to the Dashboard Manager. Click on Create New Dashboard at the top of the screen.

3. This will bring up the Name, Description, and Layout sections.

4. Once you have saved the Name, Description, and Layout, select Add Widget. Widgets allow you to display information on your dashboard as soon as you log in to your account.



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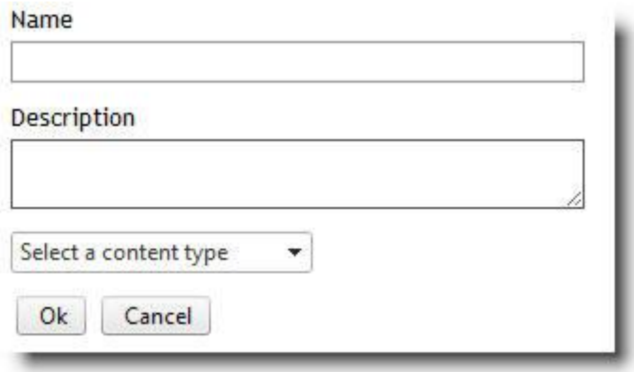
5. The Add Widget window will then pop up. First, enter the Name and Description of the widget.




6. Next, select the type of widget from the Select a content type drop down box. You will have five options to choose from.

Appointment: will show your upcoming appointments on your dashboard. In the drop down box that appears, select the number of appointments to display. If you want the widget to include a picture of the calendar, click on the box next to "Display Calendar?"

Graph: will allow you to make a graph based on a report you have already made in the report module.

Links List: allows you to put links to other websites on your dashboard. In the Link Name box enter the name of the website how you want it to appear on the dashboard. In the Link URL box enter the web address beginning with "http://".

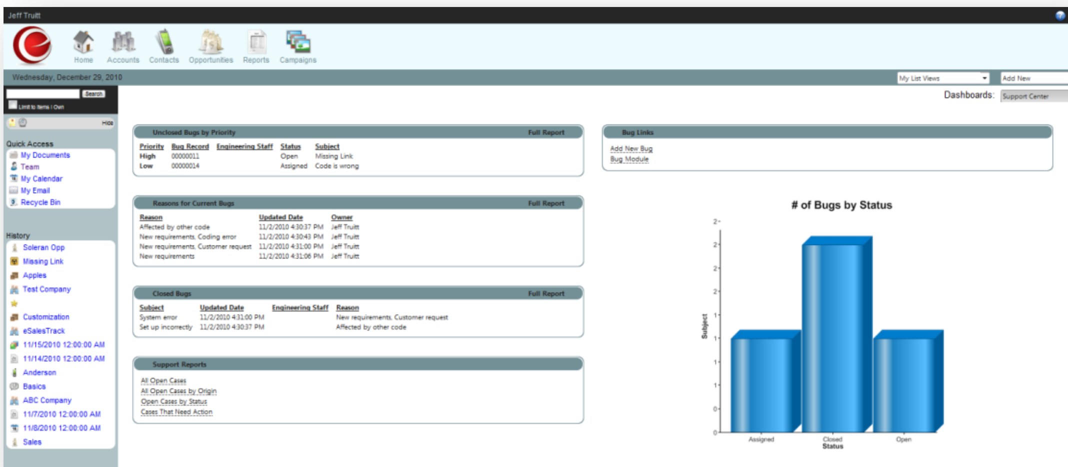
Task: allows you to display your upcoming tasks on your dashboard by selecting how many tasks you want to see at a time.

MiniReport: allows you to put a quick snapshot of any report you have previously made onto your dashboard by selecting the report, the columns from the report that you want to appear, and the number of rows from that report that you want to show up on the dashboard. (By clicking on View at the bottom of the MiniReport, you can see the entire report)

7. Once you have selected the type of widget, click the Ok button at the bottom of the Add Widget pop up window.

8. To change the order in which widgets appear or to change which column a widget is in, drag your cursor over the widget until a new toolbar appears above it. Then drag your cursor over the part of the new toolbar with the label of the widget. Your cursor will become two crossing arrows. Click and drag the widget to wherever on the page you want it to be.

9. Once you have the Dashboard formatted, click on Save under the layout selection.



## Modules

There are a few modules that appear in every account no matter which template account you use.

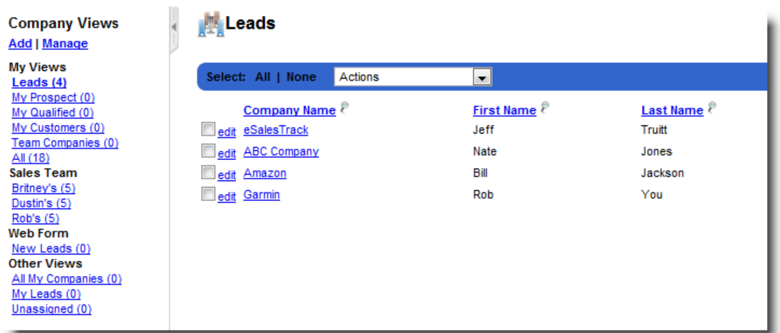
### Default Modules

| | | |
|---|---|---|
| HOME | | The home page is the first page that you come to when you login in to eSalesTrack. You can create dashboards here to have quick access to reports and charts. |
| CALENDAR | | The calendar landing page summarizes the current calendar with links to accomplish common tasks quickly and easily. Share Calendars with the entire company, teams, or individuals. |
| EMAILS | | The emails landing page includes a summary of your current emails and quick links to accomplish your most common tasks quickly and easily. |
| REPORTS | | Reports and graphs to get a quick snapshot view of various analytical reports pertaining to your sales and your teams sales. |
| CONTENT | | The content module is where you can upload and store files online. |
| CAMPAIGNS | | Emails campaigns allow you to send a series of emails to |
| EVIEW | | The eView is module where you can view and edit any records you have in eSalesTrack. |

## Normal Modules

Normal modules work like a data base. They contain records and relationships can be set up between these modules. These modules will be set up for you by eSalesTrack or the administrator of your account. You can open a normal module by adding it to your library and clicking on it.


When you open a normal module you will see your views and records for that module, if you have created them.



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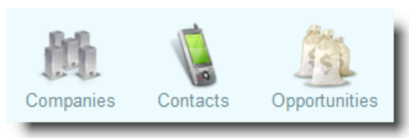
## Views

Views are simply a list of your records. Each user is able to create views to show different lists of their data. Each user is able to create views to show different aspects of their data, they can even filter views to show limited groups of their data.

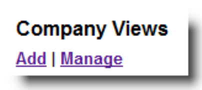

Views can be customized by module. Each module will have its own list of views containing the records related to that module. If you have relationships set you can pull information from related modules into your views.

### Creating Views

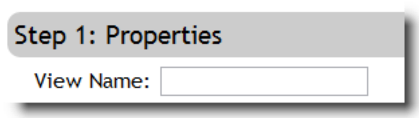
1. Open the particular module you would like to create a view from.



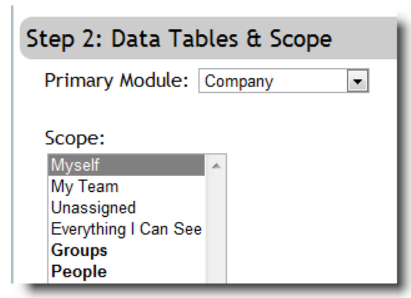

2. Click "Add" right under where the module name is.

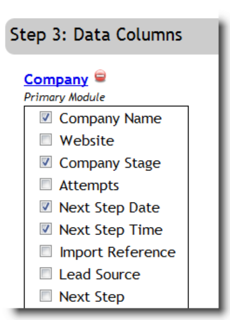



3. Give the view a name.



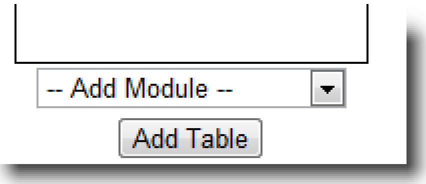

4. Select the Scope of the view. The scope is the record owners of the records you would like to include. You can select a group and see every user's data in that particular group, or hold ctrl + select the users individually.



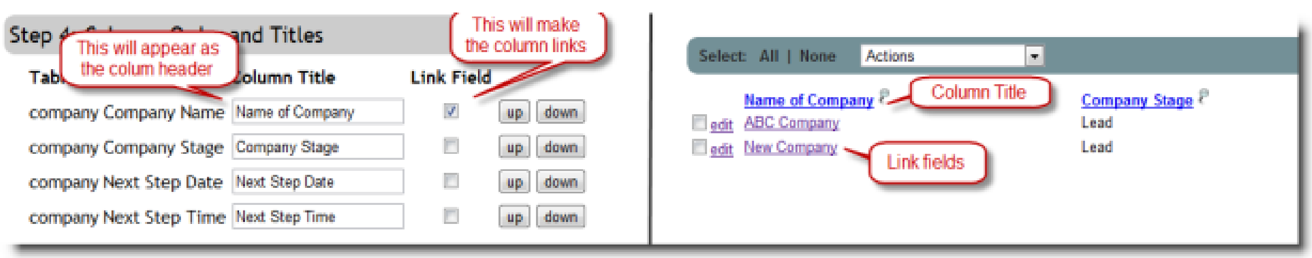

5. Select the fields you would like to have as your data columns in the view. You can select these by clicking the check box next to the field name.

6. If you would like to add information from another module you can select that module off of the "--Add Module--" drop down. You can join these two modules 2 different ways. If you can add as many related modules as you would like.

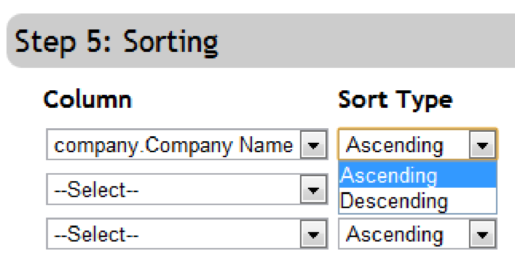



7. Select the order that you would like to have your fields appear, you can use the 

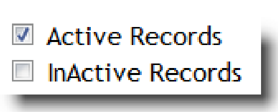
to move the fields around. The field at the very top will appear on the far left, the next below will appear just to the right of the top field. Here you can also pick fields to be a link field. This means in the view that column will be a hyper link that will open the record you click on. here you can also rename the headers that will appear in the views.



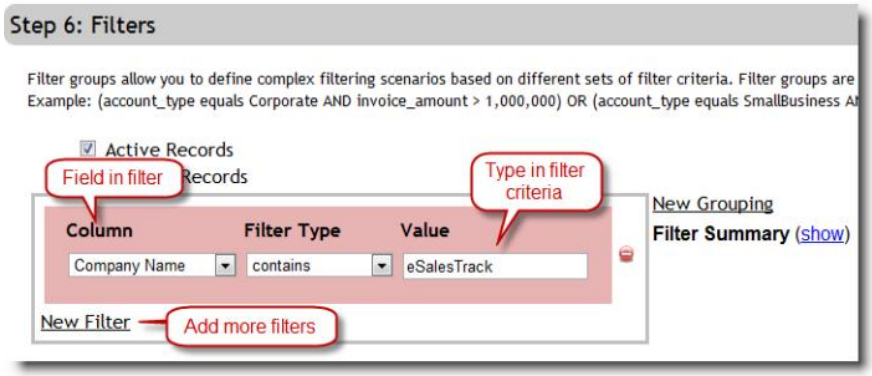

8. Next you can select how you would like to sort the view. You select a column then Ascending (A-Z) or Descending (Z-A).



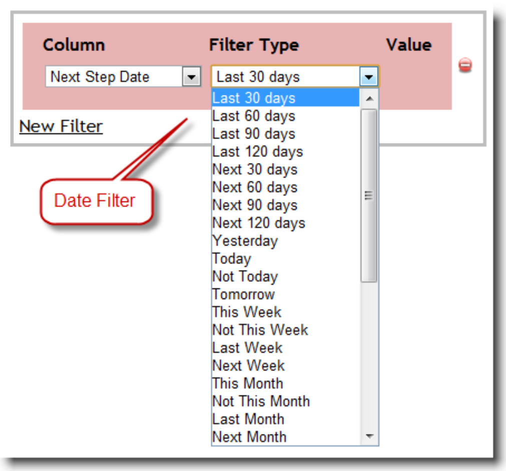

9. In the filters section you can select if you would like to view active and also inactive records in the view. Inactive records are records you have deleted (not permanently deleted).



10. You can add filters to only view certain records. Pick a field to sort by then pick a filter type, then pick a value to filter with. You can add as many filter as you need.




Date filters have a special set of filter types.



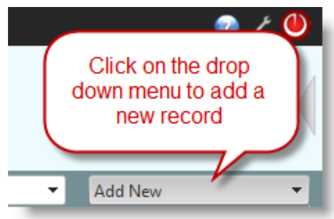

11. When finished you can click Save. This will build a preview of the view at the bottom. You can click Save and Close to return to the module with the view.

## Records

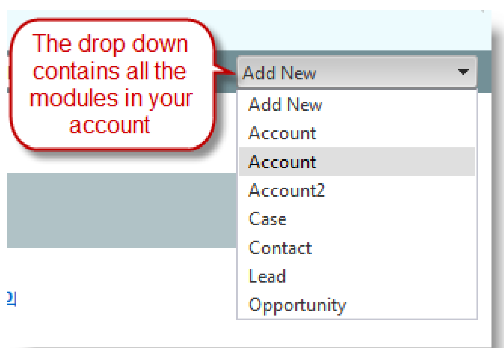
Records are the pieces of data in your account you can create by filling out the fields in your modules.

### Creating new records

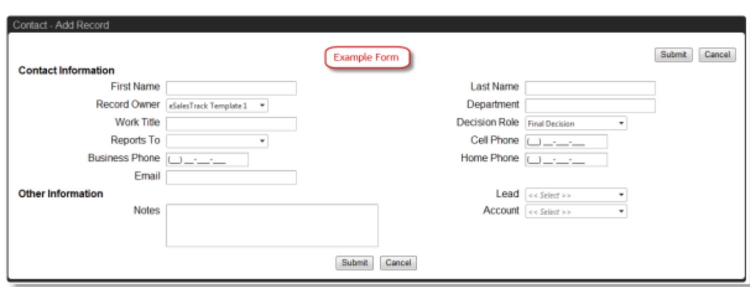
1. Click on the drop down menu labeled “Add New”




2. Select the module where you would like to add the record.



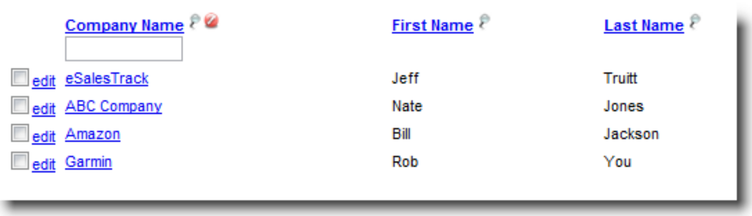

3. Fill out the related form for that module. Make sure to fill out the required fields.



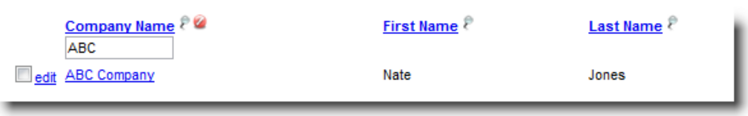
## Finding Records

After you have created records you will want to be able to find the records in your account. You can start by creating views that contain the records that you would like to see. You can then open the views and locate records by using the quick search feature.

The quick search feature is included next to each column. Just click the magnifying glass next to the column header ( ). This will open a search bar that you can use to search for values in that column.




If you type some criteria in the search bar it will filter the data and show you the search results.



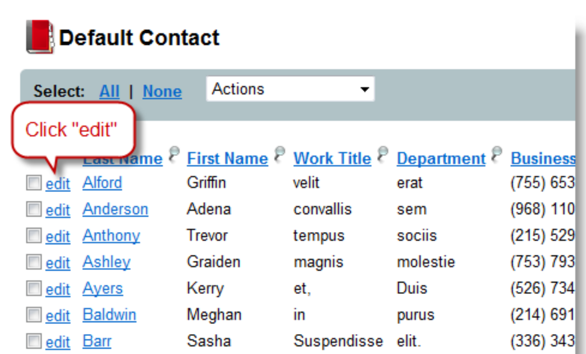

## Editing Records

Once you have found the record you are looking for you can edit the record to view and update the information about the record.

1. Open the module where the record is located.

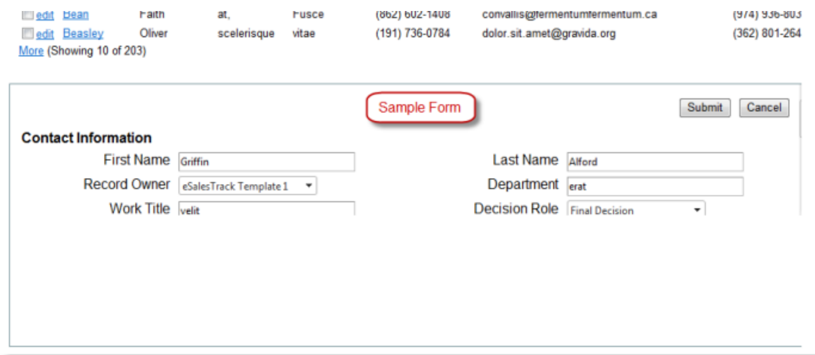
2. Locate the record you would like to edit.

3. Click "edit" just to the left of the record information.



## Editing Records (cont.)

4. The editable form will appear below the list of records.




5. Click to Submit save.

## Importing and Exporting

You can add records manually, or you also have the ability to import a list of records straight from a spreadsheet.  This way you can add thousands of records in a few minutes.

### Importing Data

Before importing Data, you must have the data saved to your computer in a Microsoft Excel spreadsheet 97-2003 or a CSV file.

1. If you are on a view for the module you want to import data into, hit the import button on the tool bar Import | Export.

2. If you click on the import button you can now skip to step 7.

3. If you are not in the specific module to which you want to import data, click on the icon in the upper right corner of the screen.

4. This opens the Toolbox landing page displaying the various options available to you. Select Manage Data by clicking on it.

5. This takes you to the Manage Data landing page which displays the various options available to you. Select Import Data by clicking on it.

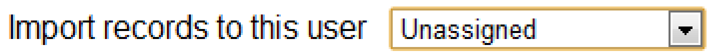
6. This takes you to the Import Data landing page which displays the modules for which you have the ability to import data. Select the module that you would like to import data into.

7. 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.

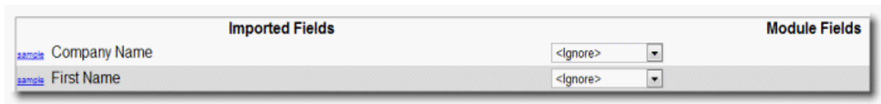
8. For the normal import, click on the Choose File button. Then select the file you want to import from your hard drive and click on Open.

9. Next to the Choose File button, the name of your spreadsheet will appear. To import that spreadsheet, click on Upload the selected file.

10. 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.




11. 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.



| Imported Fields | Module Fields |
| --- | --- |
| sample Company Name | <Ignore> |
| sample First Name | <Ignore> |

12. 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.

| Module Fields | Imported Columns |
| --- | --- |
| Attempts (attemptsx) | <Ignore> |
| Company Name (companynamex) | <Ignore> |

13. 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.


14. Once it is saved, click 

.

15. 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.

## Exporting Data

You can export information from your account at any time into a CSV spreadsheet.

1. Create a view in the module that you would like to export.  You must include all of the information that you want to export in the view, it will only export the information you can see in the view.

2. Click on the view to open it.


3. Click on Export on the toolbar.

4. The file will download and you can open it up from your browser.



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# Reports

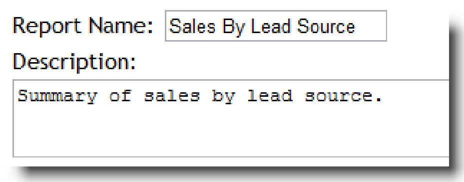
You can create reports to show any information that you have in your eSalesTrack account. Reports are lists of data like views but have a lot more capabilities than views.

## To create a report

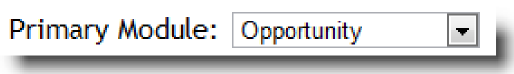
1. Click on the Report module (you may need to add it to your library).

2. Click New Report.

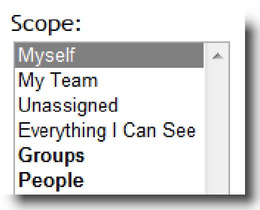
3. Give the report a Name and a Description.



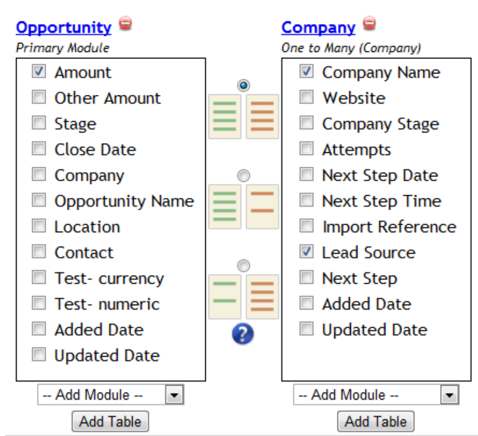

4. Select a Primary module. This is the module that the report is based off of. You can pull in information from modules that are related to this module.



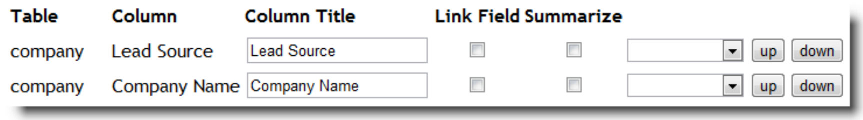

5. Select the scope for the report. The users that you select here is the information that will be in the report. You can hold Ctrl down and select more than one.




6. Next select the fields that you would like to have as your column headers by checking the boxes next to the name of the field. You can also add related modules here and add information from them. To add a related module grab the drop down labeled "-- Add Module --" and select the module you would like to add. You will need to select a join type. If you have questions about join types click the button.

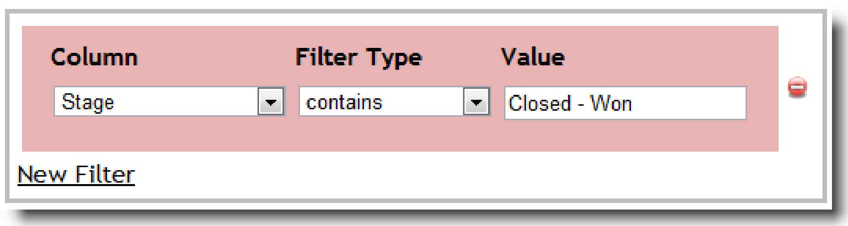


7. Once you have checked the fields you can select the order of them by clicking the "up" and "down" buttons.  The field at the top will be the column on the left.  The next field below will be just to the left of the top field and so on.  Here you can also choose to sum, average, min, or max any of your columns.  They must be numeric fields to do so.




8. Next choose which field you would like to sort the report by
.

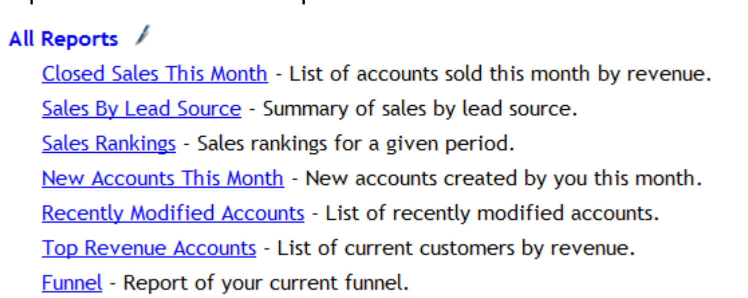

9. The next section is where you can add filters to the report if you do not need to see all of the records.




10. Click "Save and Close" when you are finished.

## Viewing Reports

You will see the report now when you click on the report module.  You can click on the name of the report to view the report.



# Email

## Email Set up

eSalesTrack offers a variety of email options for you to choose from. Each user has their own email address that they can send and receive emails from. You also have the option to use your default email client, rather than eSalesTrack email application. There is also the option to use eSalesTrack to manage your email but have the emails go out through another email server.

## To get to Email Settings

1. Click on the wrench .

2. Click on Email .

3. Click on Email settings .

### Default Email Client

This option uses your default mail client on your computer to send mail. This mail will not be associated with the record you sent the mail from and all mass emails and drip campaign emails will be sent using "estpostoffice@esaletrack.net".

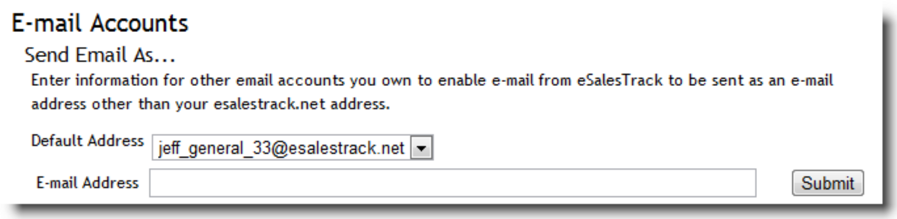
### eSalesTrack Email Address (esalestrack.net)

eSalesTrack automatically creates a new email address for you to use to send and receive email from the eSalesTrack application. The primary account for this service is your "@esalestrack.net" and you can add additional email addresses that you own (via confirmation process) to mask that account with your own account.

### Adding Email Accounts

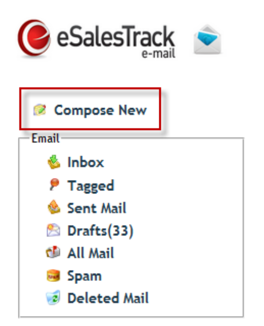
You can add additional email accounts if you select the second option for email. To add an email address open the email application by clicking “My Email” on the left menu. Click on settings inside of the email application. Then select the “Manage E-mail Accounts” option. This will open a new window where you can add an email address.

After you type in your email address and hit submit eSalesTrack will send you a confirmation email.  All you need to do is click the link in the email and you will then be able to send emails from that address.

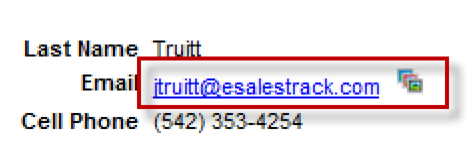



## Sending Email

You can send emails in eSalesTrack by clicking the “Compose New” button inside of the eSalesTrack application.  This will bring up a blank email.




You can also send emails by clicking any of the email address that are in email fields.  They will appear blue like a hyperlink and will open a new email address to the email address that you click.

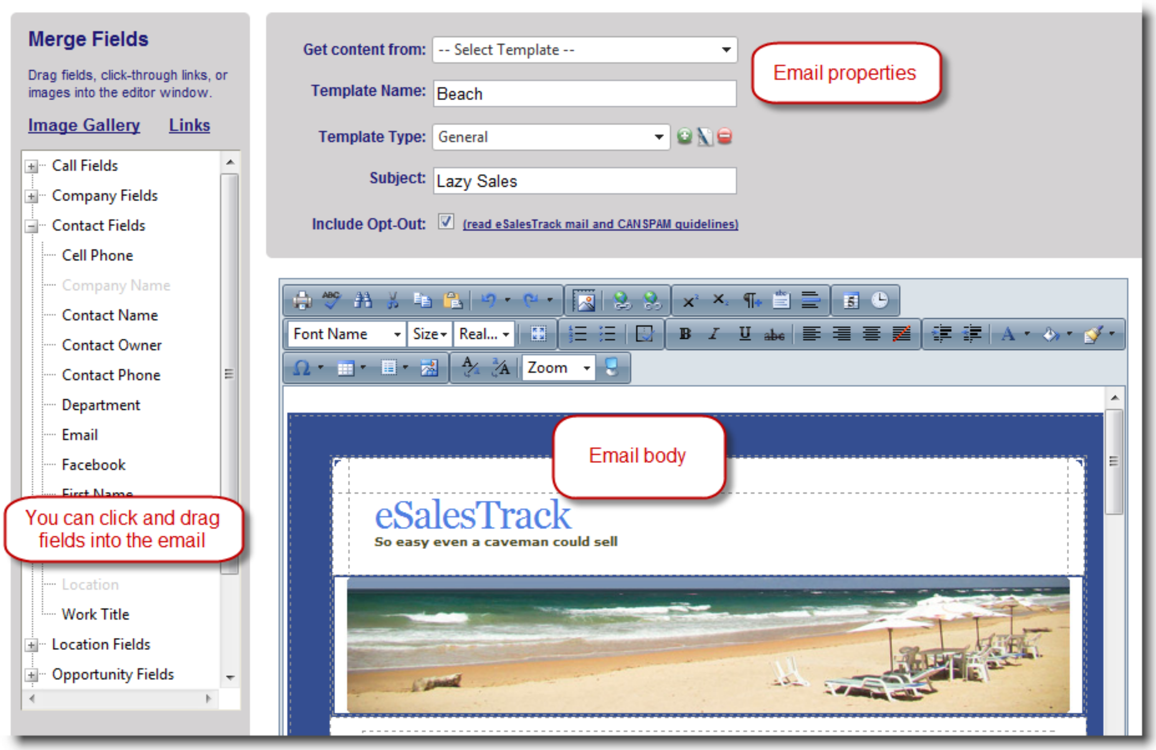



## Email Templates

Email templates work like premade emails that you can quickly pull up and send to any email address in eSalesTrack. You can even add information from the record to be included in the email.

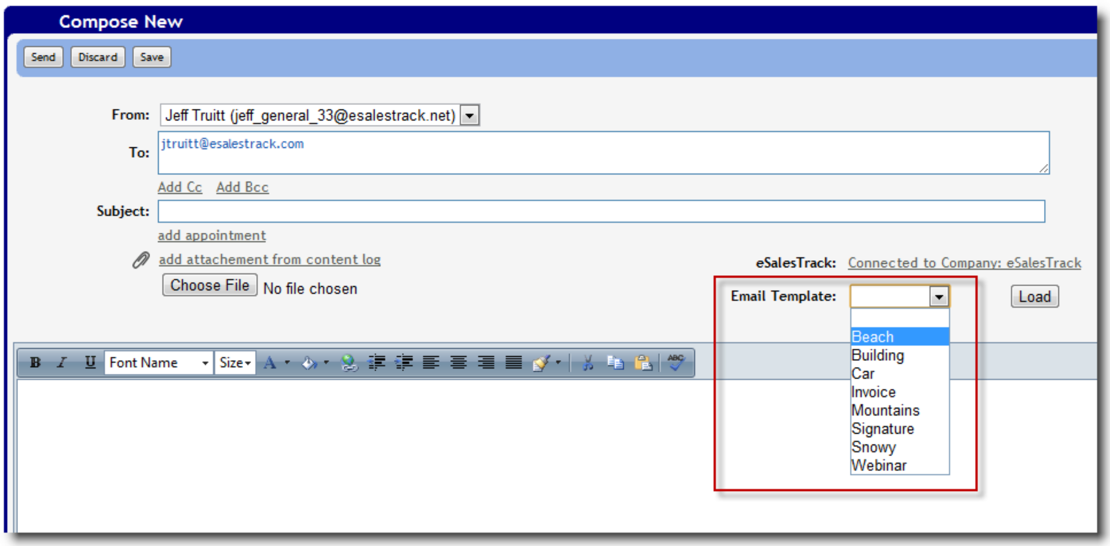
# Creating Email Templates

1. Click on admin toolbox.
2. Click on Email.
3. Click on Email Templates.
4. Click "Create New" to go to the email template creator.



## Using Email Templates

After you have created your email templates you are ready to start sending them. First locate the record that you would like to send the email to. Click on the email address, this will open a blank email. Then grab the email template you would like to send by selecting it from the drop down menu.



## Mass Email

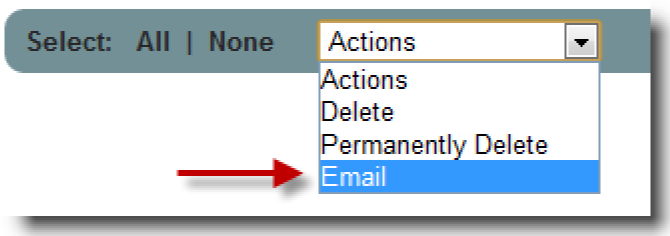
You can send up to 5,000 emails a day with our mass email feature.

To send a mass email:

1. Open the view that contains the records you would like to send the email to. Make sure you have the email address included in the view.

2. Select the records to send to by checking the box next to the edit option. You can also use the "Select" all feature.

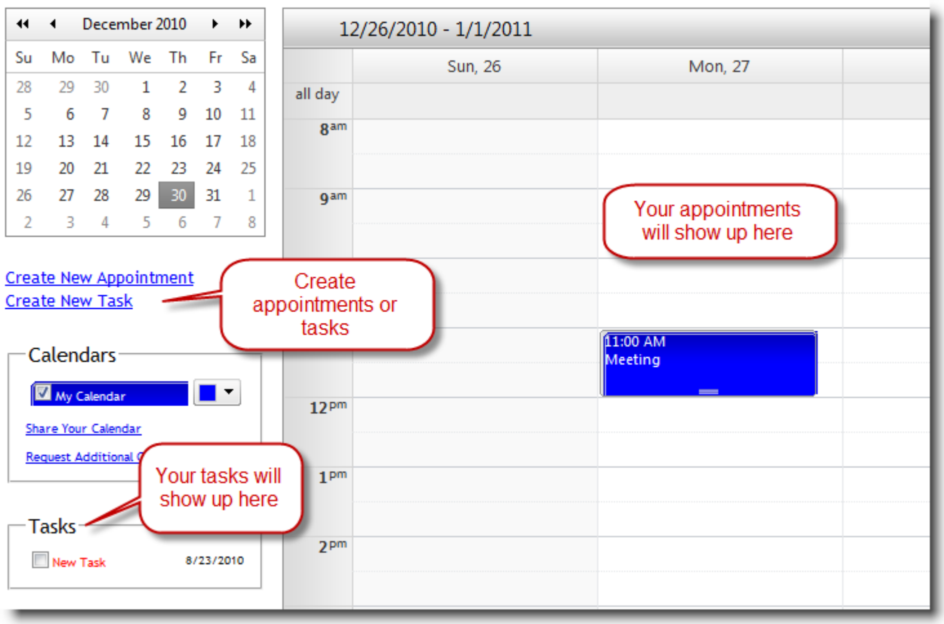
3. Select the "Email" option from the Actions drop down (make sure you have your pop up blocker disabled).




4. Follow the instructions on the pop up window to send the email.

## Calendar

The calendar application is where you can keep track of your appointments and tasks. You can create appointments and tasks inside of the calendar application and even connect them to records that you have in your account. The calendar application is located on the left menu.



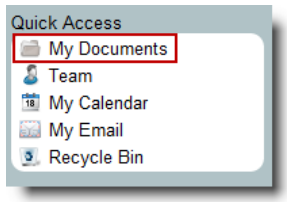

## Outlook Plug In

The Outlook plug in application syncs information from your eSalesTrack account to your Outlook. You can sync tasks, appointments, emails, and even contacts. You will find the Outlook plug in the downloads section of the toolbox.

# Documents

You can upload documents to your eSalesTrack and have them available where ever you have access to internet. You can also share documents that you upload with other users in your eSalesTrack account.

To get to the document storage center just click on “My Documents” on the left menu.




Once inside My Documents, upload documents by clicking Upload. You can also share documents with other users by using the Subscribe To... function.



1.866.765.4CRM training@esalestrack.com

## Help and Training

Your quickest form of help is the designated and formally trained system administrator for your organization. Identifying and contacting your trained administrator will typically provide the most immediate and most accurate help for your customized version of eSalesTrack.

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.