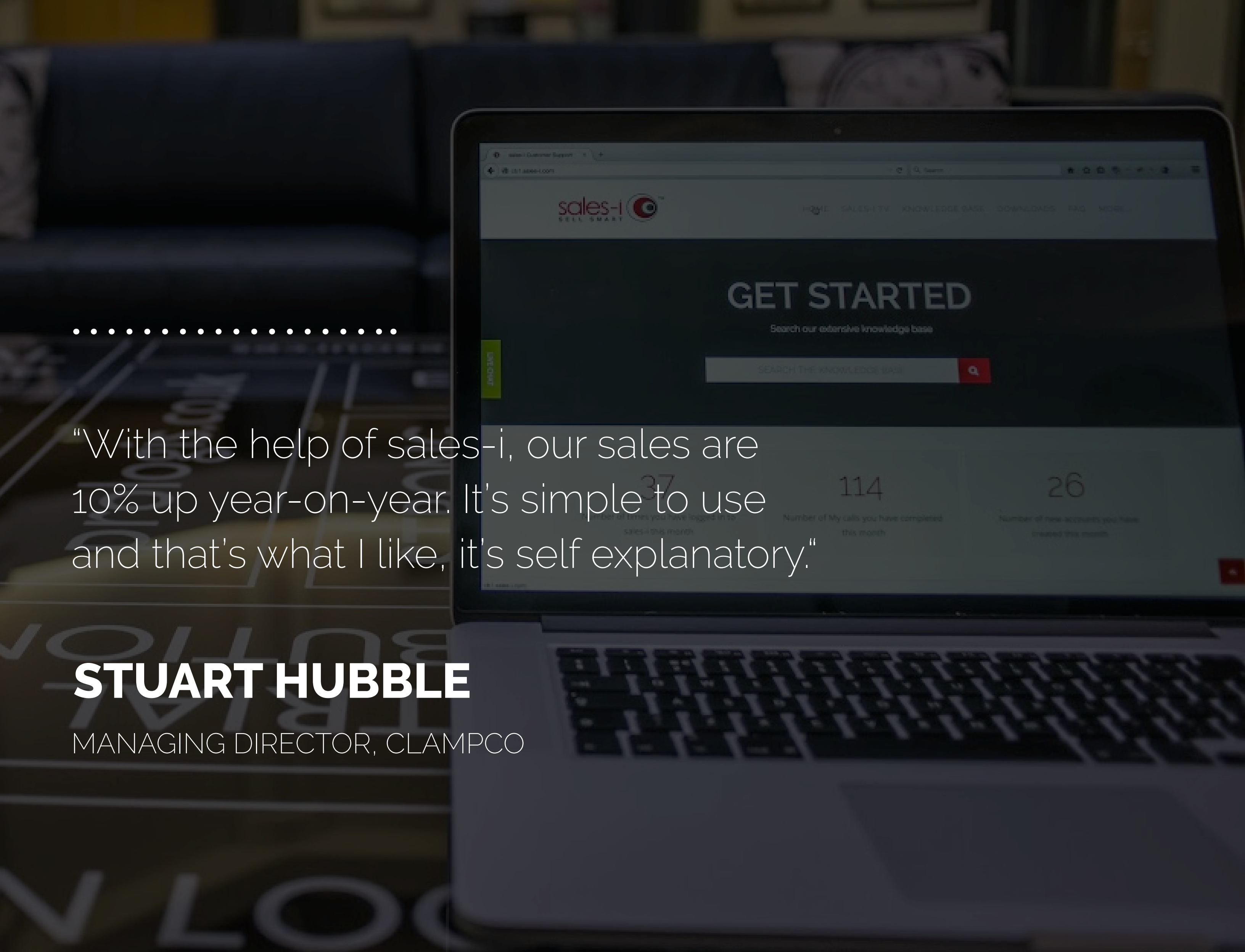
QUICK START GUIDE

We know that time is money to any salesperson, so we've designed this guide to show you two quick ways that sales-i can make every call more personal and more profitable.



"With the help of sales-i, our sales are 10% up year-on-year. It's simple to use and that's what I like, it's self explanatory."

STUART HUBBLE

MANAGING DIRECTOR, CLAMPCO

WHAT'S THE POINT IN SALES-I?

sales-i was developed to make your life easier. We want to make sure that every call you make is more personal and more profitable. Not every feature within the system is something you'll need to use, but the ones that do suit you will make your life so much easier, you'll wonder how you lived without them before.

There are a few key features that all salespeople can use, though. We'll go over two of them in this guide. The first is creating a Snapshot report - a customer facing report which would normally take you hours to make, but takes sales-i a few seconds. The second is recording a note, which makes it really easy to stay organised.

Sell smart, every day

You probably don't realise it, but there are easy-to-close sales opportunities sitting right there in your back office system.

By analysing your data, sales-i can find those opportunities and put them directly in front of you and your sales team.

Regardless of whether you're out selling in the field, based in the office or a mixture of the two, sales-i gives real purpose to every call or meeting.

Your entire sales team gets the information they need to make them 100% effective every day, meaning there's no need for milk-round calls any more.

OK, I'M SOLD.
HOW DO I LOG IN?

Getting online with sales-i couldn't is as easy as logging into Facebook, Twitter or MySpace (not that anyone does that anymore).

Step 1)

Go to the sales-i login page:

https://login.sales-i.com

Step 2)

Type in the user name and password you were given by your 'Power user'.

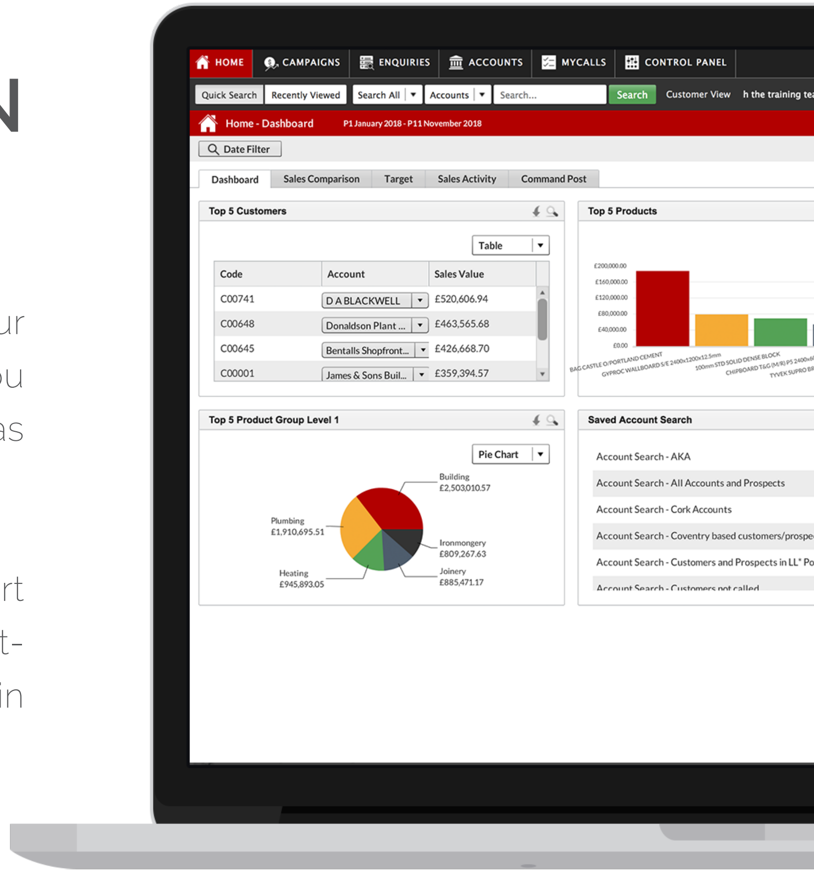
Step 3)

Agree to the T&Cs (all standard legal stuff which can be found in the footer of our website).

THE HOME SCREEN

See that screen to the right? That's your dashboard. Once you've logged in, you should see that screen first. Think of this as your homepage.

If you ever get lost in sales-i or need to start over, just hit the home button in the top left-hand corner of the screen. It's highlighted in red in the screenshot provided.



SNAPSHOT REPORTS

More often than not, you'll be logging into sales-i to find out some info on a customer you're either planning on calling or visiting.

Snapshot reports are the quickest and easiest way to get all the info you need. They contain everything you could possibly need for a successful customer call.

Step 1

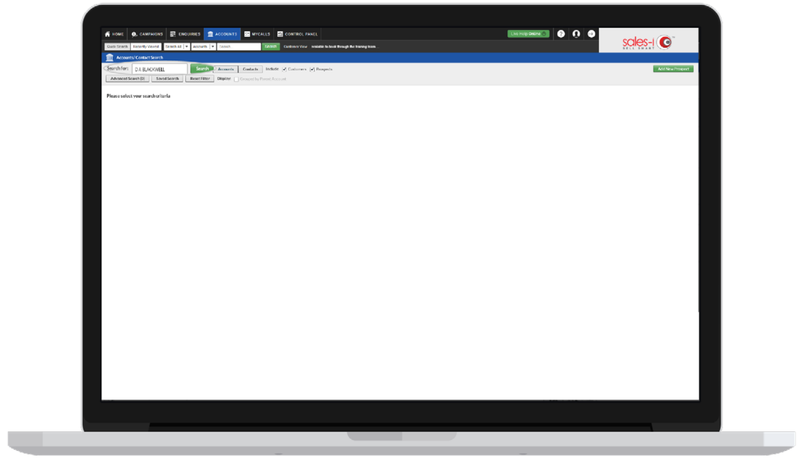
From the black navigation bar at the top of the screen, click **ACCOUNTS**.

Step 2

On the accounts page, you will see a search bar.

Use this to search for the customer you're planning on meeting.

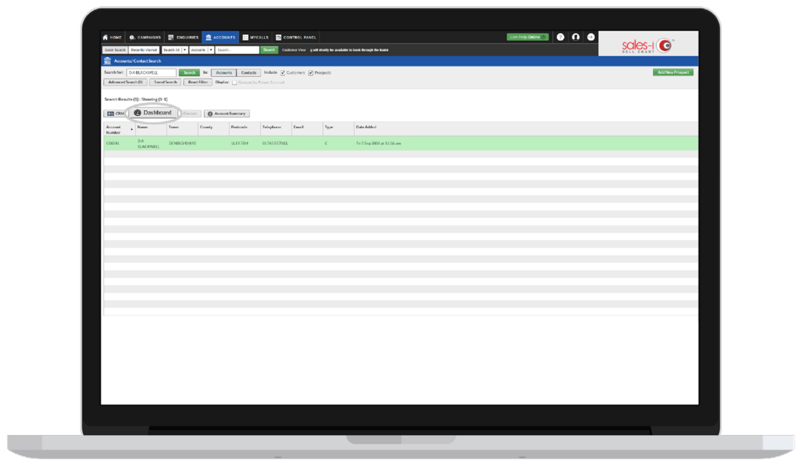
Once you've entered the customer name, click **Search**.

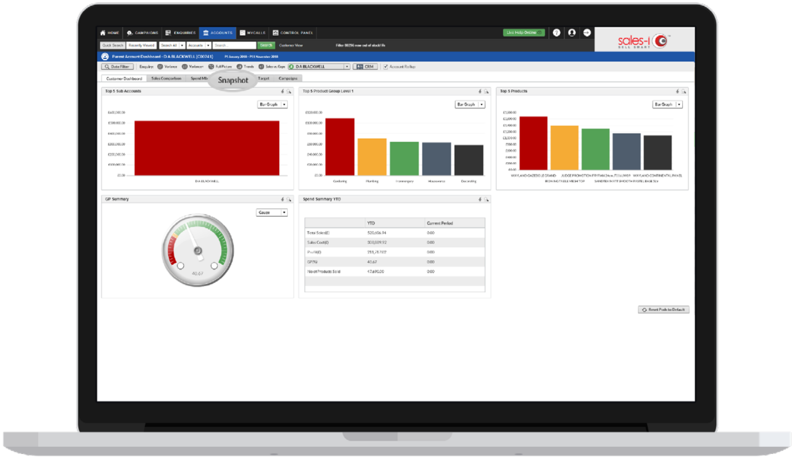


Step 3

Some results will now show in a list. If your search was specific enough, you might only get one result.

Select the correct result so that it is highlights green and then click **Dashboard**.

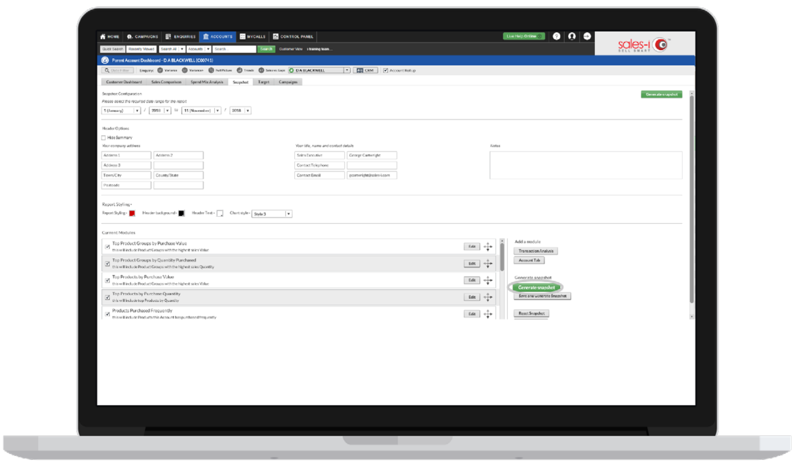




Step 4

You'll now be in the customer's dashboard. From here, you can manage this specific customer account.

From the options bar, click **Snapshot**.



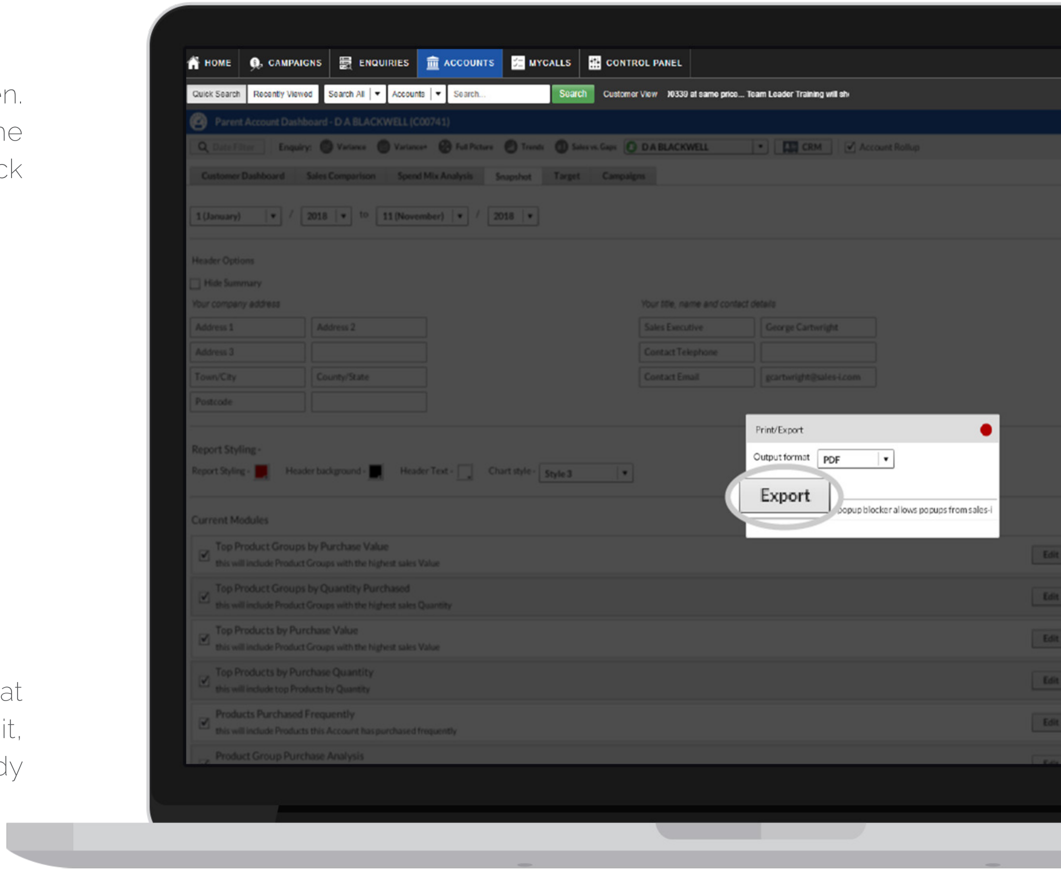
Step 5

From this page, you can choose what you want and don't want in the Snapshot report.

For now though, just click **Generate Snapshot**, which is over on the right-hand side of the page.

Step 6

A pop-up window will now open. Choose which format you want the report to be exported as and click **Export**.

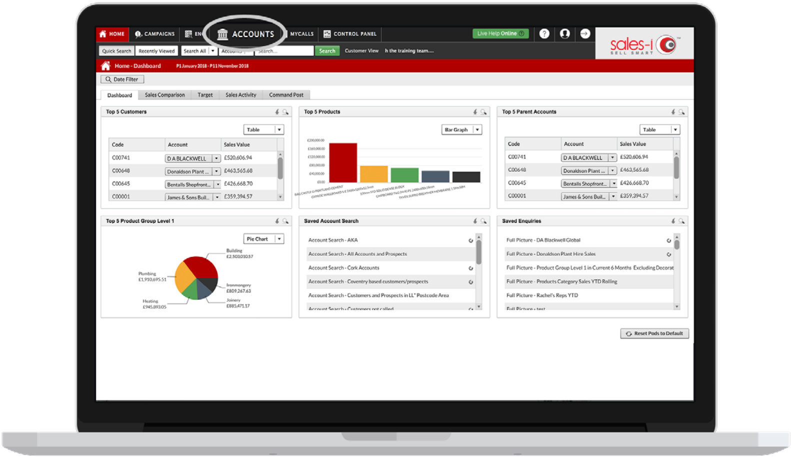


Step 7

Once ready, an option will appear that says **Click here to open file**. That's it, your Snapshot report is now ready and waiting for you to open.

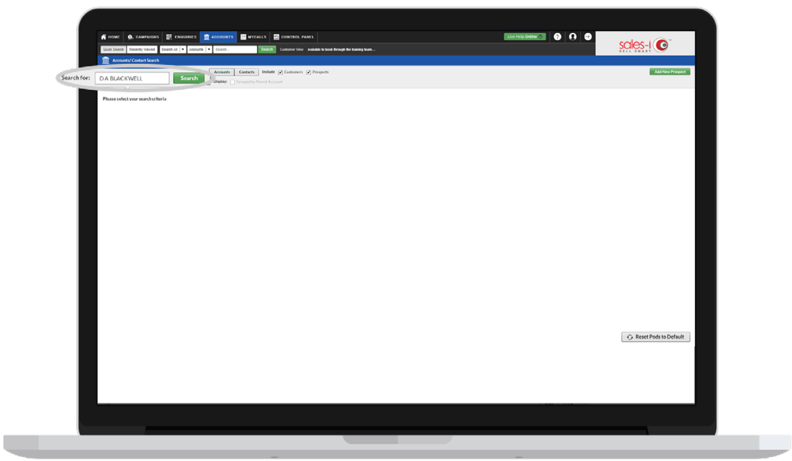
HOW TO ADD A NOTE

At the end of your meeting, you'll need to add a note into sales-i. This makes it really easy to know what the next steps are with the customer, as well as ensuring that you don't forget any key or minor details at a later date.



Step 1

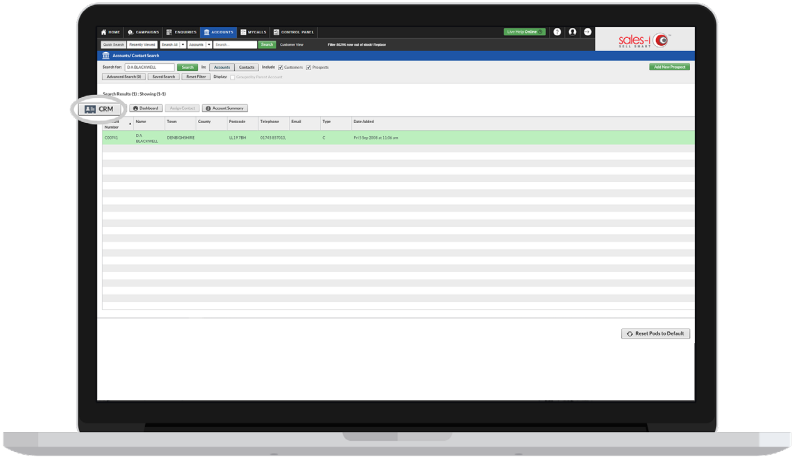
From the black navigation bar at the top of the screen, click **ACCOUNTS.**



Step 2

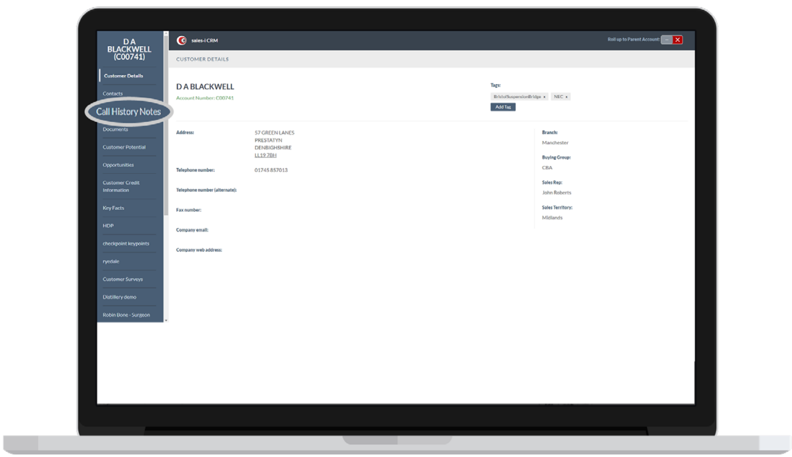
On the accounts page, you will see a search bar.

Type the name of the company you've just met and click **Search**.



Step 3

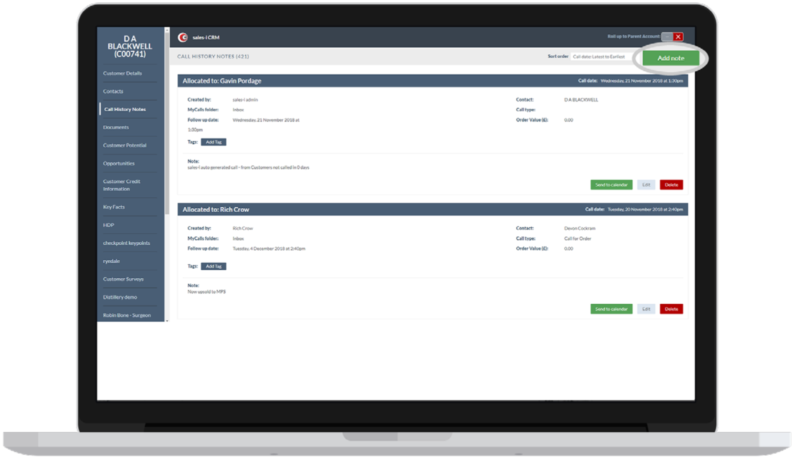
Find the right account, click it so it highlights green, and then click **CRM**.



Step 4

This screen shows all of the information that has been added about the customer.

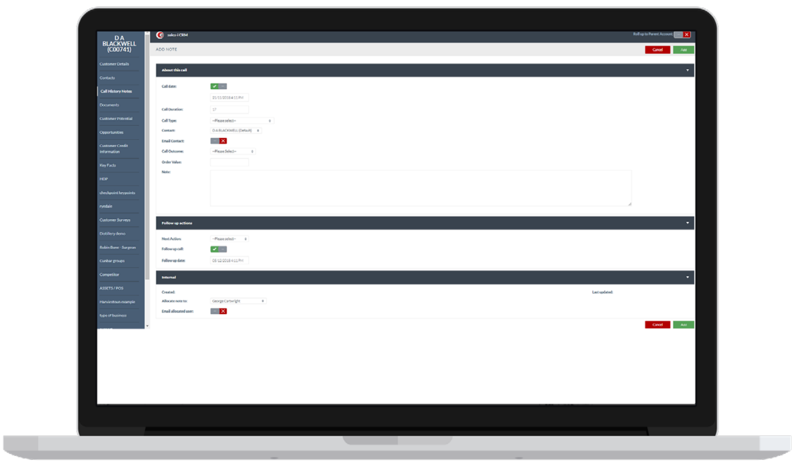
From the options on the left-hand side of the screen, find and select **Call History Notes.**



Step 5

This area of sales-i displays all of the notes already made for this account.

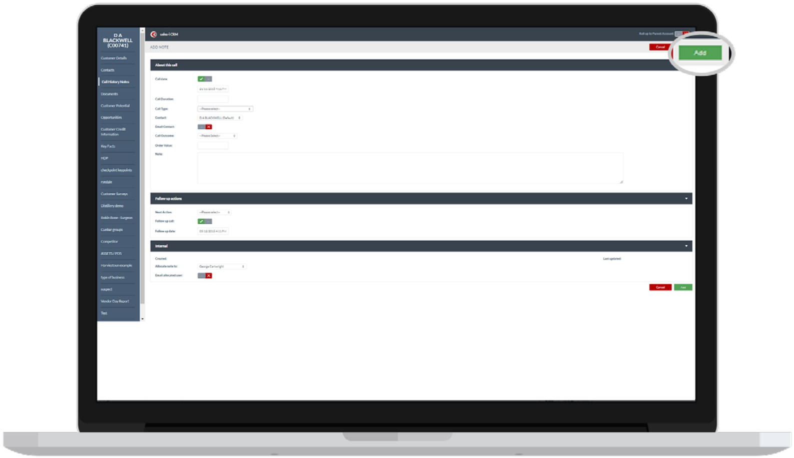
To add a new note, click the green **Add Note** button, in the top right-hand corner of the screen.



Step 6

Use the **Call Type** drop down list to select the overview of the meeting you had.

Add a Note into the mandatory **Note** field to outline the objectives and discussion points of this interaction.

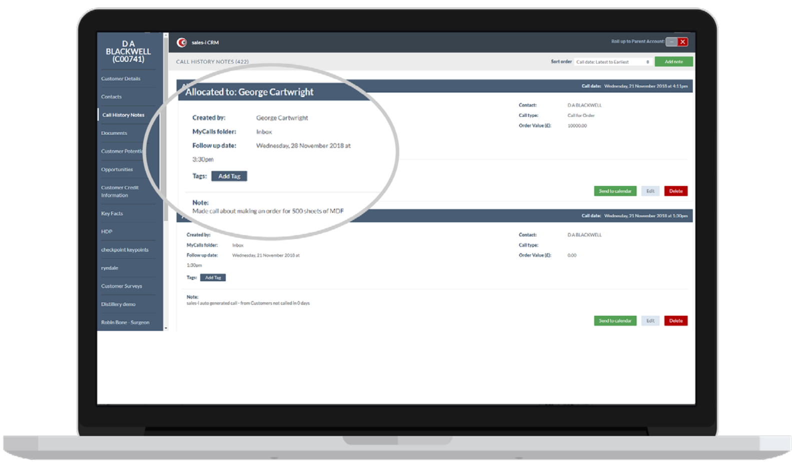


Step 7

Use the Follow-up call time & date selector* to drive your diary and schedule future interactions with the account.

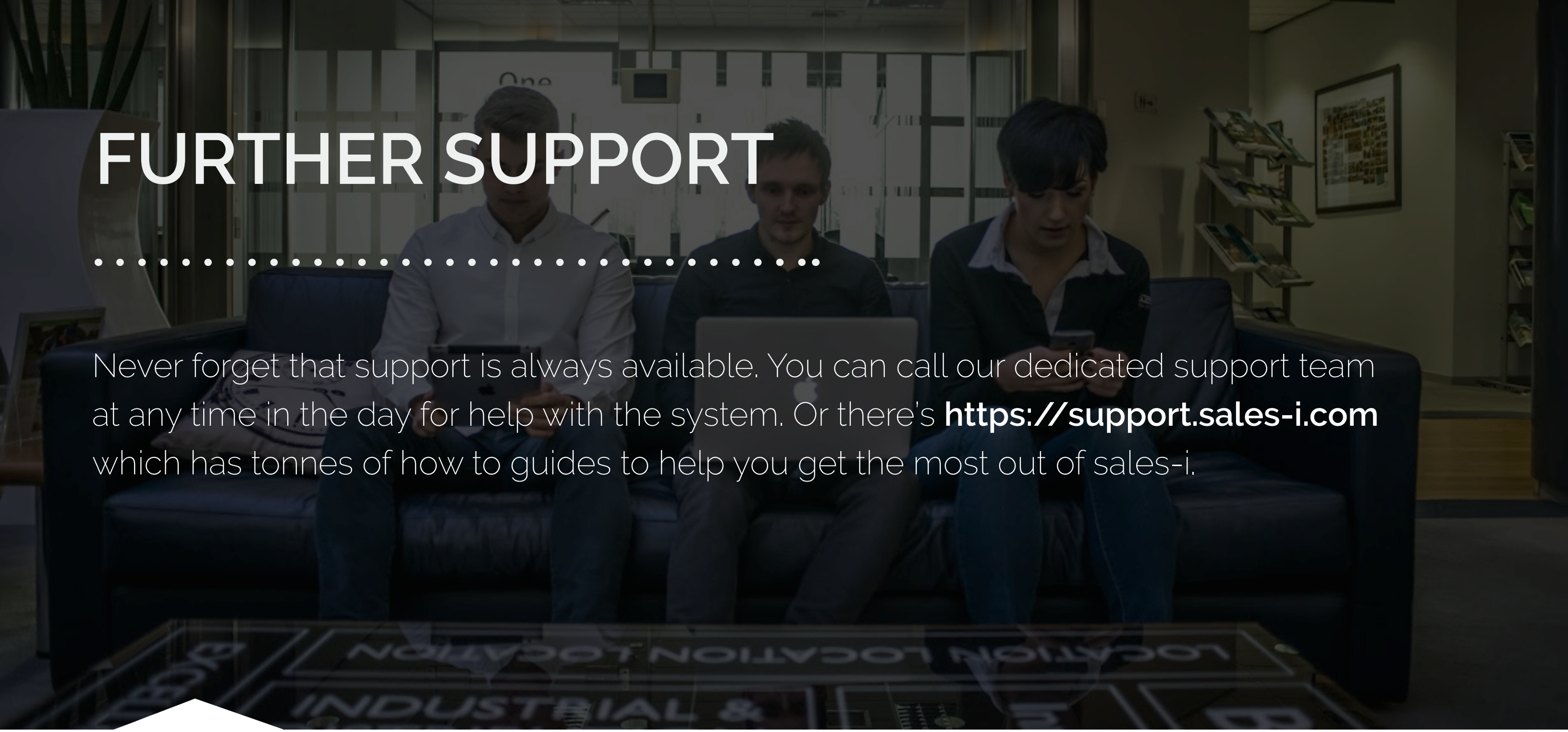
*You may need to tick the box next to Follow-up call to enable this selector.

When you're done, just click **Add**.



Step 8

This note can now be seen in the **Call History Notes** screen.



FURTHER SUPPORT

Never forget that support is always available. You can call our dedicated support team at any time in the day for help with the system. Or there's **https://support.sales-i.com** which has tonnes of how to guides to help you get the most out of sales-i.

UK HEAD OFFICE

Floor 3,
31 Homer Road,
Solihull,
B91 3LT

0845 508 7355
support@sales-i.com

NORTH AMERICA

200 W. Monroe St,
Suite 1701,
Chicago,
IL 60606

1-847-868-8175
support@sales-i.com

sales-i™
SELL SMART