Professional Edition

Basic Use Case – Multiple Users

Table of Contents

Basic Use Case – Multiple Users

To get you started quickly, let's walk through one of the most common use cases for managing a simple sales cycle from initial contact to closure. Along the way we'll highlight the recommended implementation of the respective AppShore services. This is not intended to be an exhaustive use case but it should help you grasp the basic operations quickly. Follow along and complete the steps as described in the narrative that follows.

This use case exercise assumes that you have licensed AppShore Professional Edition, that you are the AppShore Administrator, and that you will have multiple users with access to the AppShore service. If you will be the only user of the AppShore system, please download and refer to the Professional Edition Single User Use Case posted on our web site under the Customer Care tab, Documentation link.

Let's assume that you are a business owner in growth mode and, thanks to your marketing efforts, you now have more inbound sales calls from prospects than you can manage. You decide to hire two full time sales representatives who work from home in two different states. You want to continue to take the initial call from the prospects so you can provide them with personalized service and capture their contact information. After you have qualified the opportunity, and collected the contact information over the phone, you then want to distribute leads to the sales representatives based on the geographic location of the prospect. You are getting five to ten leads per day for each rep. The reps are responsible for making follow up calls, setting appointments to make presentations via a web conference, and closing the business. They are also responsible for reporting to you on the progress of each sales opportunity and all activities they have scheduled or completed in their effort to bring the business to closure. You want the reps to be able to view and edit only those leads assigned to or created by them. When wearing your sales manager hat, you want to be able to view all sales opportunities and activities in a single cumulative view and also all sales opportunities and activities by individual rep.

The sales process you have implemented is as follows:
- You will continue to take the initial inbound calls
- If a prospect is identified you will create and distribute Leads to reps
- Every day the reps are responsible for checking their Lead service for new Leads assigned
- At the time a Lead is "engaged", or contacted by a rep, the rep is to convert the Lead to an Account
- You will monitor the reps' Lead service to determine which leads have not yet been converted to Accounts, therefore, not yet contacted
- After the Lead is converted to an Account the reps are responsible for creating any additional Contact records for individuals they are introduced to within the Account during the sales cycle
- Reps are to create an Opportunity record and associate it with the Account as soon as a "legitimate sales opportunity" (however you define that term) is identified
- Reps are to create individual Activity records for each discrete call, meeting or task they schedule or execute related to advancing each Opportunity

- You will measure progress in each sales cycle and the activity level of the reps by monitoring their Opportunities and Activities

We will now step through the process of implementing and testing this use case. When we are done you will be able to explain to your reps how to follow and execute the sales policy you have created.

> *Note: For the best test of this use case, it would be helpful if you had access to two more email addresses different from the one you used to create your AppShore account. These will be used when creating the two new fictitious sales representative Users. By using your own email addresses rather than someone else's or fictitious addresses, you will be able to retrieve the passwords for the new AppShore accounts you will create in this exercise. You can then use these email addresses and passwords to log in as three different Users, yourself and the two sales representative Users you will create in this exercise. Once logged in as a sales representative, you can test the security settings to be sure all Users can only view and edit their own records. If you don't have access to any other email accounts, you can quickly create a couple "dummy" email accounts for free at www.yahoo.com, or www.gmail.com. If you do not have any other email addresses to use, or you would rather not create new email accounts, you will still be able to successfully complete this exercise. You can create new Users by entering fictitious email addresses. However, you will not be able to log in as another User to test the security rules.*

Create Roles

The first thing we are going to do is set up the security rules to ensure each rep can only see and edit their own leads once they are created by or distributed to the rep. In the AppShore service, this is done by creating what are called Roles.

Assuming you have logged in to your AppShore account as the Administrator:
- Click on the Administration link in the top right hand corner of the screen.
- Click on Roles and then New Role on the left side of the screen.
- Give the Role the name Sales Rep and add a Definition if you like. The Definition is an optional free form field and is intended to make it easy for you identify the purpose of the Role.
- Be sure the Status drop down menu box on the top right of the screen reads "Activated".
- Click Save.
- You should see a message at the top of the screen that reads "Information created".
- Click on Grant permissions on the left side of the current screen.
- Select the Sales Rep Role from the drop down menu at the top center of the screen.
- Directly beneath the drop down menu where you selected the Role near the top center of the screen is a column titled User.
- In this column only, click on the boxes labeled "Write" in the rows next to Accounts, Activities, Contacts, Leads and Opportunities. You will notice that the check box labeled "Read" is also automatically checked after you click on

the "Write" check box. This is normal and exactly what we want. Do not click any of the other boxes on the page.

- You should now see both the "Read" and "Write" boxes for these five applications filled with a check mark.
- Click Save.
- You should see a message at the top center of the screen that reads "Permissions set".

By setting permissions of both Read and Write on these five applications at the User level (in the column titled User), you have now defined a Role with security permissions that enable the User who is granted that Role to be able to edit and view only those records assigned to them or created by them under their unique user name. This single Role can now be granted to any number of Users whom you would like to share the exact same security permissions, such as a sales team or individuals within franchises. This is a safer, more efficient, and easier approach to manage as compared to assigning permissions one user at a time.

If you want everyone on your team who has the same Role (Sales Rep for example) to be able to see and/or edit all records assigned to all Users who also have the same Role (all Sales representatives for example), you can create and assign a Role that has Read or Read and Write permissions at the Role level instead of at the User level. If you want everyone on your team to be able to see and/or edit all records, irrespective of the Owner (all records assigned to all Users in the system), but not to have any Administrative permissions, you can create a Role that has Read or Read and Write permissions at the Public level and no permissions set at the Administrative level.

Now we need to create the User records for the sales representatives and assign them the Role of Sales Rep so we can start securely distributing leads to them.

Create Users

Now that you have created the Role named Sales Rep, let's now create two new User accounts, one for each of your two sales representatives. We'll assign them both the Role of Sales Rep. We'll call the Users Sales Rep 1 and Sales Rep 2.
- Click on Users and then New User on the left side of the screen.
- You will notice there are four fields that are required to create a new User (those that are labeled in red); a User name, a Last name, an email address, and the initial role.
- In the field labeled "User name", give the User the name Sales Rep 1.
- In the fields labeled First name and Last name give the User a real or fictitious name.
- Enter the email address of the new User. Each User must have a unique email address. The email address can be real or fictitious for this exercise. However, if you would like to test the full use case described here, you will need to have access to the email accounts you use to create these two new Users. If you do not have access to the email accounts, you can still complete this use case successfully with the exception of testing the security set up.
- Click the check box labeled "Send a welcome email". The password and link to access the newly created AppShore account will be sent to the email address of the User you are creating.

- Select the Role named Sales Rep from the drop down menu at the lower right of the screen labeled "Grant initial role".
- Complete as much of the optional data entry as you like.
- Click Save.
- At the top center of the screen you should see a message that reads "Information successfully created, a password has been sent by email".

Repeat the process to create the second sales representative, Sales Rep 2.

You have now created new Users, Sales Rep 1 and Sales Rep 2, that represent the two sales representatives in the field. You have assigned them each the Role of Sales Rep and you have sent them an email notification with their password, a message to let them know their AppShore accounts have been created, and a link to follow to access the login page. You are now ready to create and distribute some leads.

Create and Distribute Leads

Now let's assume that you have just hung up the phone after a lively conversation with a prospect. They seem interested in your product and would like a follow up call from a sales representative next week to discuss their needs in more detail. You have collected the prospect's contact information, and you now want to create a new Lead to be distributed to a sales representative. We'll assign this Lead to Sales Rep 1.

- Click on the Leads tab at the top of the page from any AppShore screen.
- Click New Lead
- You will notice there are no required fields when creating a new Lead (no fields labeled in red font). For this exercise, please enter at least a first and last name and enter a real or fictitious company name in the field labeled "Account".
- Select Sales Rep 1 from the drop down menu list in the top right hand corner of the screen labeled "Assigned to".
- Enter as much of the optional data as you like.
- Click Save.
- At the top center of the screen you should see a message that reads "Information successfully created".

You have now created a new Lead and assigned it to Sales Rep 1. Repeat the process of creating a new Lead but, this time select Sales Rep 2 from the drop down menu list in the top right hand corner of the screen labeled "Assigned to".

To view the Leads you have just created click on the Leads tab at the top of the page. To view only those Leads assigned to a specific User, select the User from the drop down menu box labeled "Owner" and click the Search button. Use the Clear button to clear the search criteria.

To see all Leads for all Users, click on the blank row from the drop down menu box labeled "Owner". By selecting the blank row, you are selecting all Lead records owned by all Users.

You have now successfully created and assigned one Lead to each of your two sales representatives. When the reps log into their AppShore accounts they will see these Leads have been created under their user name and they will be able to edit them.

> *Note: Leads can also be automatically created by collecting contact information from a web form that populates the AppShore Lead service. Under the Leads tab is a link labeled Capture Leads. Ask your web master or whoever is designing and maintaining your web site to copy and paste the sample HTML code found here into a form on your web site.*

Convert Leads to Accounts

Once contact has been established with a Lead, it is at this point in time we recommend you 'convert' the Lead to an Account. The primary purpose of converting a Lead to an Account is to begin tracking the status of the sales process. When a Lead is converted to an Account, it will no longer be found under the Leads tab. There is no way to reverse the process of converting a Lead to an Account.

Opportunity records are used to document the initiation of a sales process and the Opportunity Stage field (which is customizable), is used to track the progress of the sales cycle. AppShore Opportunities may only be associated with Accounts, which is one of the primary reasons for converting a Lead to an Account. If you sell to more than individual within an Account, you will want to create a Contact record for each of them and relate them to the Account record. Contacts may not be related to Leads, only to Accounts, which is another advantage of converting a Lead to an Account.

When a Lead is converted to an Account, one Account record will be created, and zero or one Contact record may be created. If the Lead record has both a company name in the Account field, and a last name in the Last name field, both an Account record and a Contact record will be created at time of conversion. The Contact record, if created, will also be permanently related to the Account record. After an Account is created, any number of new Contact records may then be created and related to the Account.

The Account record will be given the same name that appears in the Lead record in the field labeled "Account" at the time the Lead is converted. Now, let's convert a Lead to an Account, and then create an Opportunity and an Activity.

- Click on the Leads tab at the top of the page.
- Select the Lead from the list that you assigned to Sales Rep 1 and open it in either view or edit mode by clicking on the Account name, the green pen icon, or the magnifying glass icon next to the record.
- In the top right hand corner of the screen, select Sales Rep 1 from the drop down menu list labeled "Assigned to".
- Click the Convert link at the top of the page under the Leads tab. The Convert link at the top of the page only appears when the Lead record is open.

- Fill in any missing data you want to be transferred to the Account record. Be sure there is data in the Last name field of the Lead record to ensure a Contact record will be created.
- Click Save.
- At the top center of the screen you should now see a message that reads "Lead successfully converted, one Account created, one Contact created"

Repeat this process and convert the other Lead you created and assigned to Sales Rep 2.

To verify the Account records were created click on the Accounts tab at the top of the screen.
- Select the blank row from the drop down menu box labeled "Owner" to display all Accounts, or select a specific User name (Sales Rep 1 or Sales Rep 2) to view only those Accounts assigned to that User.
- Click on the Search button (the one next to the Clear button).

You can also confirm the Contact records were created at the time the Lead was converted.
- Click on the Contacts tab at the top of the page.
- You can view all Contacts by selecting the blank row from the filter field labeled "Owner", or view only those Contacts assigned to a specific User by selecting either Sales Rep 1 or Sales Rep 2 from the "Owner" drop down menu box.

So far, you have created a Role, created two Users and assigned them a Role. You have created two Leads and assigned one to each sales representative. You have converted two Leads to Accounts and simultaneously created two Contact records. Now let's create some Opportunity records and associate them with these two Accounts.

Create Opportunities

Good news! A Lead that was just a name on a list yesterday has now turned into a legitimate sales opportunity. Now you want to begin tracking it as a potential future source of revenue. You have converted the Lead to an Account and a Contact record was created for you automatically.

Now let's create an Opportunity record so we can forecast a projected close date and begin tracking the sales representative's activity and progress on the Account.

- At the top of the screen, click on the Opportunities tab.
- Click on the New Opportunity link directly below the Opportunities tab.
- You will notice there are five required fields (those labeled in red font) to create an Opportunity record; Name, Account, Closing Date, Stage and Expected Amount.
- Give the Opportunity a name. We suggest you use something that is descriptive of a typical sales opportunity in your business as the Opportunity name. For example if you have multiple products or services, you may want to name the Opportunity with a product or service name.

- Every Opportunity record must be associated with an Account. To do so, click on the magnifying glass icon directly to the right of the field labeled "Account".
- Select the Account you assigned to Sales Rep 1 from the list in the pop up window by clicking on the Account name. The Account name field of the Opportunity record will automatically be populated when the pop up window is closed.
- Every Opportunity record must have an expected closing date. This field will be used when generating a Forecast. To select a Closing Date, enter a date in the Closing Date field in the format yyyy-mm-dd, or click on the calendar icon directly to the right of the field labeled "Closing Date" and select a date from the calendar. The Closing Date field of the Opportunity record will automatically be populated with the date you selected when the pop up calendar window is closed.
- Every Opportunity record must have a Stage. The Stage field represents where you are in the sales process. Select a Stage by clicking on one of the selections in the drop down menu box labeled "Stage". The Stage field can be customized to match your specific sales process. As the sales process progresses, the sales representative, or you, can modify the value of the Stage field appropriately. By doing so, you will begin to develop a clear picture of your pipeline and have insight into where you with a particular sales opportunity at any given time.
- Every Opportunity record must have a projected dollar value. This value will be used when generating a Forecast. Enter a dollar value for the Opportunity in the field labeled "Expected Amount". Do not use a currency symbol. Use only numbers, commas and periods. The dollar amount can be zero.
- Assign the Opportunity to Sales Rep 1 by clicking on this User name from the drop down menu box labeled "Assign to". The default value of the "Assigned to" field is the owner of the Account.
- Complete as much of the optional data entry as you like.
- Click Save.

Repeat this process and create a New Opportunity under the Account you converted and assigned to Sales Rep 2.

When you are done, click on the Search link in the top left side of the screen directly below the Opportunities tab. You should now see the Opportunities are associated with the proper Account and Owner.

As the sales manager and Administrator of the AppShore service, you can use the Search Opportunities feature to display all your company's forecasted business. You can sort the list by Opportunity name, Account name, Stage, Expected Amount, percentage of likelihood to close, or the projected Closing Date. You can also filter the records displayed by using the search and filtering criteria fields at the center of the page just above the list of Opportunities.

Now that you have created and distributed some Leads, converted them to Accounts, and created Opportunity records, let's create some Activity records and associate them with Opportunities.

Create Activities

It is assumed that during the sales process there are some discrete steps or a series of actions that need to be executed by the sales representative in order to move the business to closure, i.e., follow up call, onsite meeting, send literature, etc. As your company's sales manager, you want to be updated regularly about the status of each Opportunity and the Activities of the sales representatives. The AppShore Activities service is where these discrete activities will be recorded by the reps and monitored by you. Let's create a couple Activities and associate them with the two Opportunities we have just created.

- Click on the Activities tab at the top of any AppShore screen.
- At the top of the screen below the Activities tab you will see links labeled "New Call", "New Meeting", and "New Task". We are going to create an Activity that represents a telephone call.
- Click on the New Call link at the top of the page directly below the Activities tab.
- As you can see there is only one required field to create an Activity record which is the name of the Activity.
- We suggest a descriptive name such as; "Call to close", or "Introduce new product", or something that indicates the purpose of the call.
- Enter a name for the Activity in the field labeled "Name".
- You can set the date and time (we use Military time, a.k.a. the 24 hour clock) for the Activity, the Duration (how long it is expected to take to complete), and you can set the Status and Priority of the Activity. Set these values if you like, or just leave them as is for this exercise. You can always go back and change these values at a later time.
- Click on the magnifying glass icon next to the field labeled "Account" and select the Account you assigned to Sales Rep 1.
- From the drop down menu box labeled "Related to", select Opportunity.
- Click on the magnifying glass icon next to the field immediately to the right of the field labeled "Related to". You will see a pop up window populated with all the Opportunities related to the Account you selected. In this case there will be only one. Select the Opportunity you assigned to Sales Rep 1.
- Click on the magnifying glass icon next to the field labeled "Contact". Select the contact of the Account assigned to Sales Rep 1.
- Click Save.

You should now see a message in the top center of the screen that reads "Information created".

Repeat the process and create an Activity for the Opportunity assigned to Sales Rep 2.

To verify the Activities were created, associated with the correct Account, Opportunity and Contact, and assigned to the correct User, click on the Search link directly below the Activities tab and be sure you see the Activities you just created in the list. You can use the "Owner" filter to view only Activities assigned to either Sales Rep 1 or Sales Rep 2. Or, you can view all Activities by selecting the blank row from the "Owner" drop down menu box.

Success! You have created a Role, created two Users, assigned them a Role, created and assigned Leads, converted Leads to Accounts and Contacts, created Opportunities and Activities and assigned them to the reps.

Now let's pull it all together. To see all the associated Contacts, Opportunities and Activities for an Account, click on the Accounts tab at the top of the page.

- Open either Account in the list in View mode by clicking on the Account name or the magnifying glass icon to the left of the Account.
- At the top of the page you will see all the Account information. If you scroll down you should see the Contacts, Opportunities and Activities associated with the Account toward the bottom of the page. This is how you can get a quick look at any Account and view all related records.
- From the Account record view, you will notice you can open a Contact record by clicking on the person's name. You can open an Opportunity record by clicking on the Opportunity name, and you can open an Activity record by clicking on the Subject. These records can be edited from this view by clicking on the green pen icon next to them. The View mode of the Account record thereby provides you with a single point of access and control for the records related to the Account.

Now, if all this worked well, there is only one thing left to test. This is the part that will require you to log in to the AppShore accounts created for Sales Rep 1 and Sales Rep 2. If you have not yet retrieved the passwords for these Users from the email accounts you sent them to, please do so now.

The intent of this portion of the exercise is to confirm the security set up for the Role we created called Sales representative. Remember the idea was that the reps could view and edit only those records that were either assigned to them or created by them. If you want to test this part of the use case please continue to follow along.
If you do not want to continue – you're done. You have covered all the basics. Have fun and enjoy the AppShore service.

If you want to continue:

- Log out and then log back in as Sales Rep 1.
- Search Leads, you should see none because we converted the one Lead we created to an Account.
- Search Accounts, Contacts, Opportunities and Activities and you should see only those that were assigned to Sales Rep 1 and not those assigned to Sales Rep 2.
- Log out and then back in as Sales Rep 2.
- You should see the same thing here. Sales Rep 2 can only see the records assigned to Sales Rep 2 and not those assigned to Sales Rep 1.

In the future, when you want to provide real sales representatives with access to the AppShore service, have them follow the guidelines we have provided for you here as an initial training exercise. They will be able to do everything you have just done except create Roles and Users, unless you grant them the Administrator Role that would allow them to do so.

Enjoy the system and please do not hesitate to contact us for additional coaching, guidance or training.