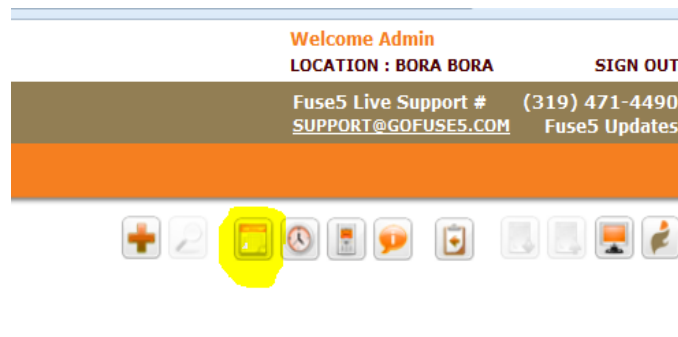


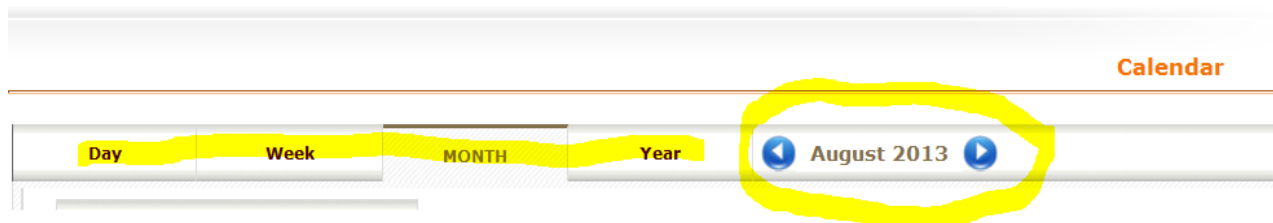
Calendar

The calendar module in Fuse5 is available by going to SALES MANAGEMENT > CALENDAR. The calendar and related functionality can be used by your business as a CRM to manage your schedule, sales events, calls, meetings, to do items, contacts, leads, etc. The calendar is available to you from almost every page in Fuse5 by using the Calendar Icon available at the top right of your screen underneath the Live Support Phone Number.

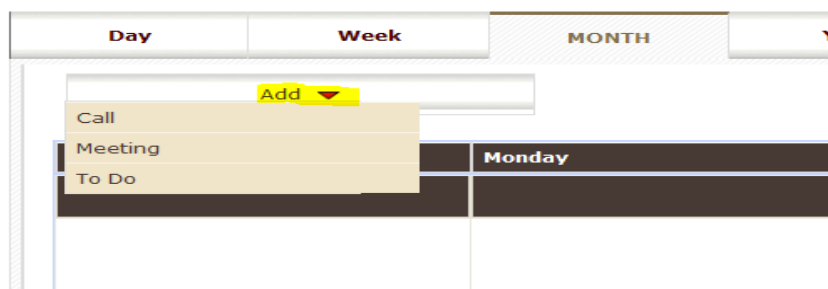


SALES MANGEMENT > CALENDAR

Let's look at what's available in the Calendar module. At the top right of the calendar you will see that you can select to see a DAY, WEEK, MONTH, or YEAR view. Additionally, you can move back or forward using the blue arrow buttons to the right of the time period selection.



Underneath the time period selection is a drop down that allows you to create a CALL, MEETING or TO DO.



Fuse5 Training Materials

CALL / MEETING / TO DO: The interface for creating all three of these is the same with the options described below.

Event Type - Choose either call, meeting or to do

Event Name - Give your event a name

Accounts / Leads - Is the event related to an account or a lead? Choose with the drop down.

Related To - You can either put in the account (name or number) or lead name (you will get a drop down if more than one may apply) or use the **SELECT** button to see a list of all accounts or leads.

Accounts Fuse5

Search Contains In Account Name Search Now

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Showing 1 - 20 of 7925

| Account Name | Account Number | City |
|------------------------------|----------------|------------|
| #27 BLACK'S TIRE AND SERVICE | 2450.3 | Whiteville |
| #28 BLACKS TIRE AND SERVICE | 2450.8 | Whiteville |
| #29 BLACK'S TIRE AND SERVICE | 2450.4 | Whiteville |
| #30 BLACK'S TIRE AND SERVICE | 2450.5 | Whiteville |
| #33 BLACK'S TIRE AND SERVICE | 2450.6 | Whiteville |
| #34 BLACKS TIRE SERVICE | 2450.34 | |
| #35 BLACKS TIRE SERVICE | 2450.13 | Whiteville |
| #38 BLACK'S TIRE | 2450.38 | |
| 130 TIRE | 436601 | FAIRMONT |
| 130 AUTOMOTIVE | 400110 | WHITEVILLE |
| 1625 Partnership | 16 | |
| 188TH BST | 101126 | FORT BRAGG |
| 1ST CLARKSVILLE STORE | d0137 | |
| 1ST CLASS AUTOMOTIVE | 100450 | DALE CITY |

1 2 3 4 5

SO# - if the event is related to a Sales Order, enter the number here.

Account Auto - If the account has ACCOUNT AUTOS saved in it's account record, you can access them here.

Description – Type in a description of what the event is intended for.

Location – Where will the event take place, what phone number will you call, etc.

Status – Options include Planned, Held, Not Held, In Progress, Pending Input, or Deferred.

Assigned To – Choose from the drop downs to select who the event is assigned to.

Fuse5 Training Materials

Priority – Choose between High, Low, and Medium

Event Starts At – Choose the date and time the event starts.

Event Ends At – Choose the date and time the event ends.

Available Users / Selected Users – Choose the Fuse5 users you want involved in the event.

Send Reminder – Do you want a reminder sent? and if so, choose the days, hours, and minutes when the reminder is sent out.

Repeat – Do you want to repeat the event? If yes, choose the days, weeks, months, or years for frequency of the event to be repeated.

Contacts -

New Event

Event Type ☒ Call ☐ Meeting ☐ To Do

*Event Name

Accounts

* Related To

Select View Clear

(Auto-Suggest: Begin Typing)

SO#

View Clear

(Auto-Suggest: Begin Typing)

Account Auto

Select Account Auto View Add New

Description

Location

*Status

Planned

Assigned To

admin

Priority

High

☐ Send Notification

Event starts at

0315PM

08-01-2013

Event ends on

0320PM

08-01-2013

To invite, select the users from the "Available Users" list and click the "Add" button.

To remove, select the users from the "Selected Users" list and the click "Remove" button.

Page 3

Fuse5 Training Materials

The screenshot displays a web interface for creating an event. It features two main sections: 'Available Users' and 'Selected Users'. The 'Available Users' list includes JBrewster, PWalker, VDiesel, DJohnson, and GGadot. Between these lists are 'Add >>' and '<< Remove' buttons. The 'Selected Users' section is currently empty, with a note stating 'Selected users will receive an email about the Event.' Below the user lists, there are radio buttons for 'Send Reminder' (Yes/No) and a checkbox for 'Repeat' with an 'Enable Repeat' option. At the bottom left is a 'Contacts' list box, and at the bottom right are 'Select Contacts' and 'del' buttons. The entire form is enclosed in a frame with 'Save' and 'Cancel' buttons at the very bottom.

Once you have set up Calls, Meetings, or To Dos they will be displayed on the calendar. Calls will have a phone icon, meetings a person icon, and to dos will have no icon at the top left of the event. If you hover over the event you will see a small + (plus symbol) at the top right. If you click it the event will open up and you will see all of the info that was set for the original event. The other icon you will see if you hover over it is a forward arrow button at the bottom left. It allows you to mark the event as held, not held, postpone, change owner, or delete.

The screenshot shows a calendar with three orange event cards. Each card has an icon in the top left corner, which is circled in black. The first event is a 'Call' (phone icon) from 3:15 pm to 3:20 pm, titled 'Call Dave about possible sales order', with details about a 2003 Ford F450 Super Duty. The second event is a 'Meeting' (person icon) from 4:05 pm to 5:00 pm, titled 'Pick up parts at John's'. The third event is a 'To Do' (no icon) from 5:00 pm to 6:00 pm, titled 'Salesperson go visit McMahon Automotive'. Each card also shows the owner and status at the bottom.

| Time | Event Title | Details | Owner | Status | Priority |
|-------------------|---|--|--------|----------|----------|
| 3:15 pm - 3:20 pm | Call Dave about possible sales order | Vehicle Type: 2003, FORD-MEDIUM DUTY, F450 SUPER DUTY, V8-363 6.0L Dsl, 12345678 | admin | Planned | High |
| 4:05 pm - 5:00 pm | Pick up parts at John's | | admin | Planned | Low |
| 5:00 pm - 6:00 pm | Salesperson go visit McMahon Automotive | | Dennis | Not Held | High |

Fuse5 Training Materials

Day View.....

DAY

Week




Month

Year

9 August 2013

Add ▼

My Total Events : 2, 2 Pending

| # | Start Date & Time | End Date & Time | Event Type | Event Details |
|---|--------------------|--------------------|---|---|
| 1 | 08-09-2013 03:15pm | 08-09-2013 03:20pm |  Call | Call Dave about possible sales order [More...] |
| 2 | 08-09-2013 04:05pm | 08-09-2013 05:00pm |  Todo | Pick up parts at John's [More...] |
| 3 | 08-09-2013 05:00pm | 08-09-2013 06:00pm |  Meeting | Salesperson go visit McMahon Automotive [More...] |

Week View.....

Day

WEEK

Month

Year

4 August 2013 - 10 August 2013

Cal

Add

My Total Events : 2, 2 Pending

View : Weekly Calen

| | 4 - Sun | 5 - Mon | 6 - Tue | 7 - Wed | 8 - Thu | 9 - Fri |
|---|---------|---------|---------|---------|---------|---------|
| 7:00 am | | | | | | |
| 8:00 am | | | | | | |
| 9:00 am | | | | | | |
| 10:00 am | | | | | | |
| 11:00 am | | | | | | |
| 12:00 pm | | | | | | |
| 1:00 pm | | | | | | |
| 2:00 pm | | | | | | |
| 3:00 pm | | | | | | |
| <div><div><div>3:15 pm - 3:20 pm</div><div>Call Dave about possible sales order</div><div>Vehicle Type: 2003, FORD-MEDIUM DUTY, F450 SUPER DUTY, V8-363 6.0L Dsl, 12345678</div><div>(admin Planned High)</div></div></div> | | | | | | |

Month View.....

Fuse5 Training Materials

Calendar

Day

Week

MONTH

Year

August 2013

Calendar

Add

My Total Events : 2, 2 Pending

View : Monthly Calendar

| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|--------|--------|---------|-----------|----------|---|----------|
| | | | | 1 | 2 | 3 |
| | | | | | | |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| | | | | | <div><div>3:15 pm - 3:20 pm</div><div>4:05 pm - 5:00 pm</div><div>+1 More</div></div> | |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| | | | | | | |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 |

Year View.....

Calendar

Day

Week

Month

YEAR

2013

Calendar

Call

Meeting

To Do

Add ▼

My Total Events : 6, 3 Pending

View : Yearly Calendar View ▼

January

Sun

Mon

Tue

Wed

Thu

Fri

Sat

6

7

13

20

27

8

14

15

22

28

1

15

16

23

29

2

16

17

24

30

3

17

18

25

31

4

18

19

26

5

19

20

27

February

Sun

Mon

Tue

Wed

Thu

Fri

Sat

3

10

17

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4

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19

26

6

13

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16

23

March

Sun

Mon

Tue

Wed

Thu

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12

19

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6

13

20

27

7

14

21

28

April

Sun

Mon

Tue

Wed

Thu

Fri

Sat

7

14

21

28

8

15

22

9

16

23

10

17

24

11

18

25

12

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26

13

20

27

May

Sun

Mon

Tue

Wed

Thu

Fri

Sat

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12

19

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June

Sun

Mon

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July

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Fri

Sat

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26

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20

27

August

Sun

Mon

Tue

Wed

Thu

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Sat

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24

September

Sun

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Tue

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Thu

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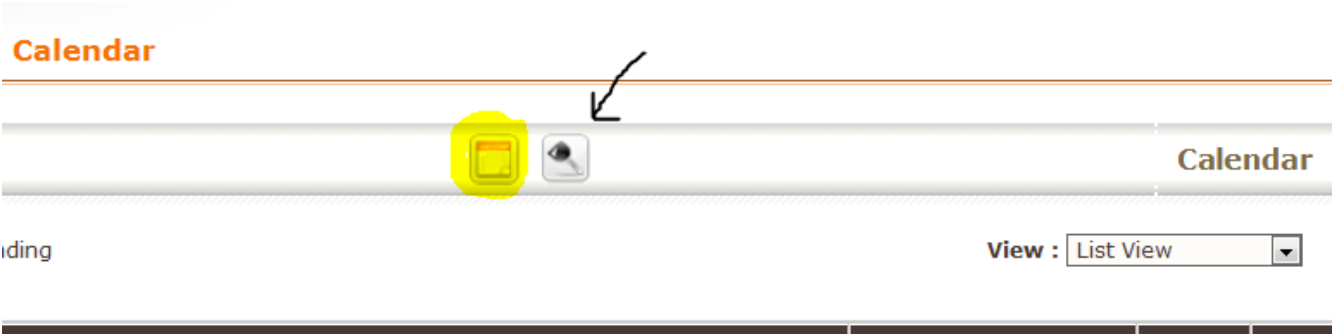
5

12

19

26

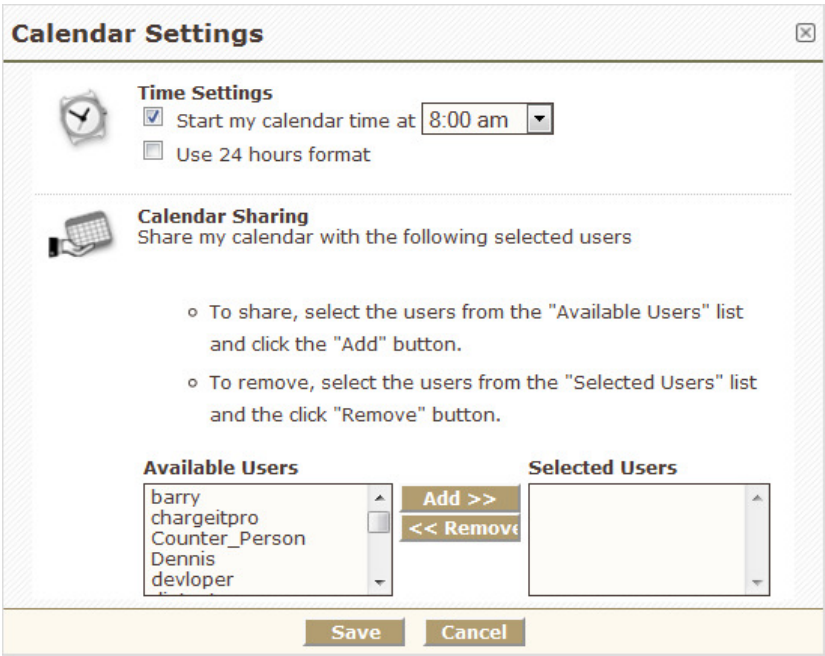
At the top right of the calendar there are a few more options available to you. The icon highlighted in yellow is the open calendar button. When you click it, it opens up a monthly calendar and allows you to choose which day you want to look at. The button with the arrow pointing at it is the settings button. In the calendar settings you can choose the time your calendar starts each day (you may want it to start at 4am, or 8am, it's up to you). You also choose whether to use 24 hour format (often referred to as military time). Finally, you can choose which users are allowed to view your calendar.



OPEN CALENDAR





SETTINGS



SALES MANAGEMENT > CONTACTS

Contact Information

| | | | |
|---------------------|--|-----------------|--|
| Contact Information | | | |
| First Name | Mr. <input type="text"/> Dennis | Department | <input type="text"/> |
| Office Phone | <input type="text"/> 319-333-9499 | Birthdate | <input type="text"/> (mm-dd-yyyy) |
| Last Name | <input type="text"/> Crosser | Email | <input type="text"/> |
| Mobile | <input type="text"/> 319-334-3242 | Reports To | <input type="text"/>    |
| Account Name | ROBERT T SUGGS JR.   | Assistant | <input type="text"/> |
| Lead | <input type="text"/>   | Yahoo Id | <input type="text"/> |
| Home Phone | <input type="text"/> | Assistant Phone | <input type="text"/> |
| Lead Source | <input type="text"/> | Do Not Call | <input type="checkbox"/> |
| Other Phone | <input type="text"/> | Email Opt Out | <input type="checkbox"/> |
| Title | <input type="text"/> | Assigned To | admin <input type="text"/> |
| Fax | <input type="text"/> | Reference | <input type="checkbox"/> |
| | | Notify Owner | <input type="checkbox"/> |

Fuse5 Training Materials

First Name – Choose prefix and first name of the contact.

Office Phone - Enter the contacts phone number.

Last Name – Enter the contacts last name.

Mobile – Enter the contacts mobile / cell phone number.

Account Name – Use the + (plus) button to access a list of all of the accounts in your Fuse5 system and pick the account the contact is associated with.

Lead – Use the + (plus) button to choose from your lead list.

Home Phone – Enter the

Lead Source -

Other Phone -

Title -

Fax -

Department -

Birthdate -

Email -

Reports To -

Assistant -

Yahoo Id -

Assistant Phone -

Do Not Call -

Email Opt Out -

Assigned To -

Reference -

Notify Owner -

Customer Portal Information / Address Information

Fuse5 Training Materials

| Customer Portal Information | | | |
|--------------------------------------|--|--------------------|-----------------------------------|
| Portal User <input type="checkbox"/> | | Support Start Date | <input type="text"/> (mm-dd-yyyy) |
| | | Support End Date | <input type="text"/> (mm-dd-yyyy) |

| Address Information | | <input type="radio"/> Copy Other Address | <input type="radio"/> Copy Mailing Address |
|---------------------|----------------------|--|--|
| Mailing Street | 1760 Stone Creek Cir | | Other City North Liberty |
| | | | Mailing State NC |
| | | | Other State IA |
| Other Street | 528 Augusta Cir | | Mailing Postal Code 28399 |
| | | | Other Postal Code 52317 |
| | | | Mailing Country |
| Mailing PO Box | A | | Other Country |
| Other PO Box | | | |
| Mailing City | B | | |

Portal User -
Support Start Date -
Support End Date -
Mailing Street -
Other Street -
Mailing PO Box -
Other PO Box -
Mailing City -
Other City -
Mailing State -
Other State -
Mailing Postal Code -
Other Postal Code -
Mailing Country -
Other Country -

Contact Image Information / Description Information

| Contact Image Information: | |
|----------------------------|--|
| Contact Image | <input type="button" value="Browse..."/> No file selected. |

| Description Information | |
|-------------------------|--|
| Description | |

Contact Image -
Description -

SALES MANAGEMENT > LEADS

Lead Information

| | | | |
|------------------|----------|-------------|-------|
| Lead Information | | | |
| First Name | --None-- | Fax | |
| Phone | | Title | |
| Last Name | | Email | |
| Mobile | | Lead Source | |
| Company | | Lead Status | |
| | | Assigned To | admin |

First Name – Enter first name of lead.

Fuse5 Training Materials

Phone – Enter leads phone number.

Last Name – Enter leads last name.

Mobile – Enter leads mobile / cell phone number.

Company – Enter the name of the company the lead works for.

Fax – Enter the leads fax number.

Title – Enter the leads title.

Email - Enter the leads email address.

Lead Source - ????????????

Lead Status - ????????????

Assigned To – Enter the user within Fuse5 that the lead is assigned to / whom is working with them.

Custom Information / Address Information / Description Information

| Custom Information | |
|-------------------------|----------------------|
| Number Of Locations | <input type="text"/> |
| Current Computer System | <input type="text"/> |
| Current Catalog | <input type="text"/> |

| Address Information | |
|---------------------|----------------------|
| Street | <input type="text"/> |
| City | <input type="text"/> |
| Country | <input type="text"/> |
| State | <input type="text"/> |
| PO Box | <input type="text"/> |
| Postal Code | <input type="text"/> |

| Description Information | |
|-------------------------|----------------------|
| Description | <input type="text"/> |

Number of Locations - Enter how many locations the leads company has.

Current Computer System – Enter the current computer system the lead's company is using to manage inventory and create sales orders.

Current Catalog - If using a catalog service, which are they using.

Street – What is the leads street address?

PO Box - Does the lead have a PO Box?....if so enter it.

Postal Code - Lead's zip code.

City – Lead's city.



Country – Lead's country.

State – Lead's state.

Description – Enter a description of the status of conversations with the lead or any other information necessary to remind you as to what is going on with the lead.

SALES MANAGEMENT > CAMPAIGNS

Fuse5 Training Materials

| Create Campaign | | | |
|-----------------------------------|--|-------------------------|----------------------|
| | | Save | Cancel |
| Campaign Information | | | |
| Campaign Name | <input type="text"/> | * Expected Close Date | <input type="text"/> |
| Campaign Status | --None-- | Target Audience | <input type="text"/> |
| Assigned To | admin | Target Size | <input type="text"/> |
| Product | <input type="text"/>   | Sponsor | <input type="text"/> |
| Campaign Type | --None-- | Num Sent | <input type="text"/> |
| Expectations & Actuals | | | |
| Budget Cost | 0 | Actual Sales Count | <input type="text"/> |
| Actual Cost | 0 | Expected Response Count | <input type="text"/> |
| Expected Response | --None-- | Actual Response Count | <input type="text"/> |
| Expected Revenue | 0 | Expected ROI | 0 |
| Expected Sales Count | <input type="text"/> | Actual ROI | 0 |
| Description Information | | | |
| Description | <input type="text"/> | | |

Campaign Name – Enter the name of the campaign.

Campaign Status – Choose from active, cancelled, completed, inactive, or planning.

Assigned To – Which Fuse5 user is the campaign assigned to?

Product - Use the + (plus icon) to choose from among your products if only one is involved in the campaign?????????

Campaign Type – Choose from advertisement, banner adds, conference, direct mail, email, others, partners, public relations, referral program, telemarketing, trade show, or webinar.

Expected Close Date – When do you expect this campaign to be completed?

Target Audience – How many potential accounts / customers do you expect to reach with this campaign?

Target Size - ??????????

Sponsor - Have you involved any other sponsors in this campaign?

Num Sent - How many emails, direct mailings, etc. have you sent out as part of the campaign?

Budget Cost – What is the budget for this campaign?

Actual Cost – What was the actual cost of this campaign?

Expected Response – What was the expected response in terms of revenue from this campaign?

Expected Revenue – What was the quantifiable response in terms of revenue from this campaign?

Expected Sales Count – How many sales did you expect to generate from this campaign?

Actual Sales Count – How many sales did you generate from this campaign?

Expected Response Count – If your campaign was not directed at generating sales, how many responses did you expect to get? (ex.referrals, demos at a trade show, leads generated from telemarketing, etc)

Actual Response Count - How many responses did you get?

Expected ROI – Did you have an expected ROI (Return On Investment) from the campaign? Ex. For every dollar spent did you expect to make \$1.50 in sales? What was the total ROI expected?

Actual ROI – What was the actual ROI of the campaign?

Description – Enter a general description of the campaign.