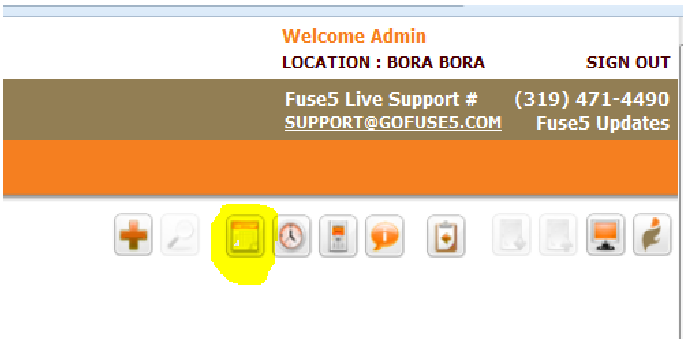
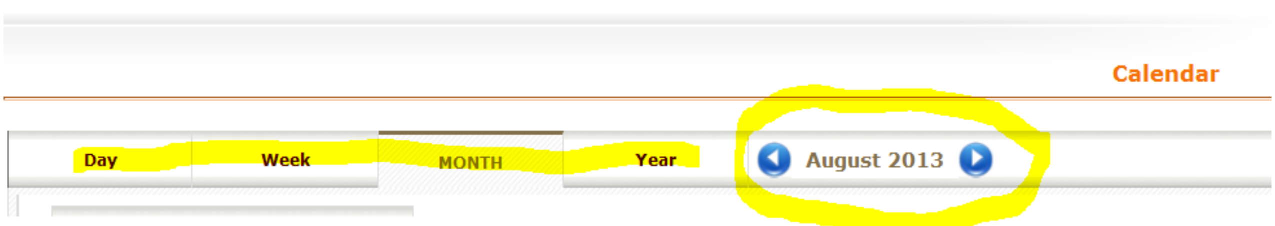
# Calendar

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.

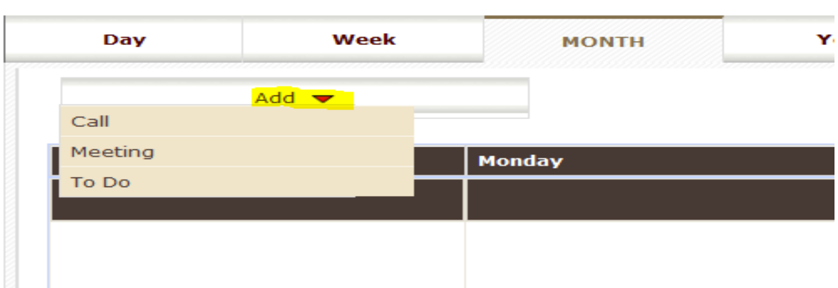



## SALES MANGEMENT > CALENDAR

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 can move back or forward using the blue arrow buttons to the right of the time period selection.

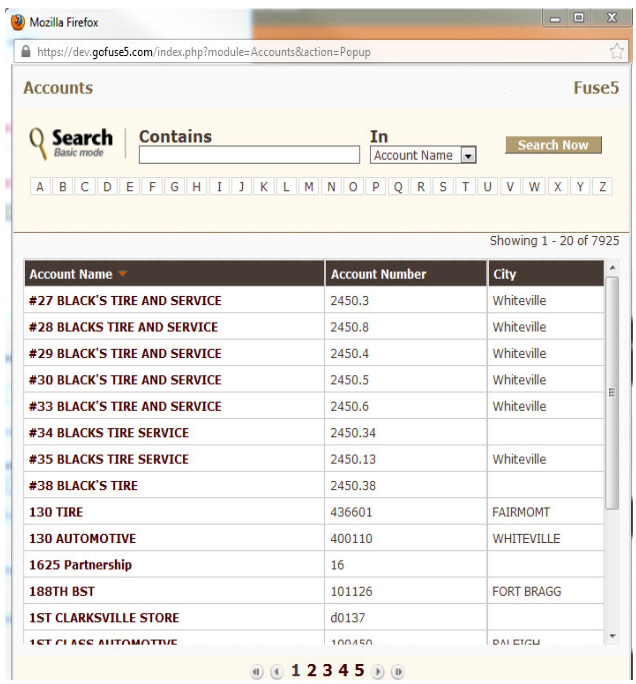



Underneath the time period selection is a drop down that allows you to create a CALL, MEETING or TO DO.



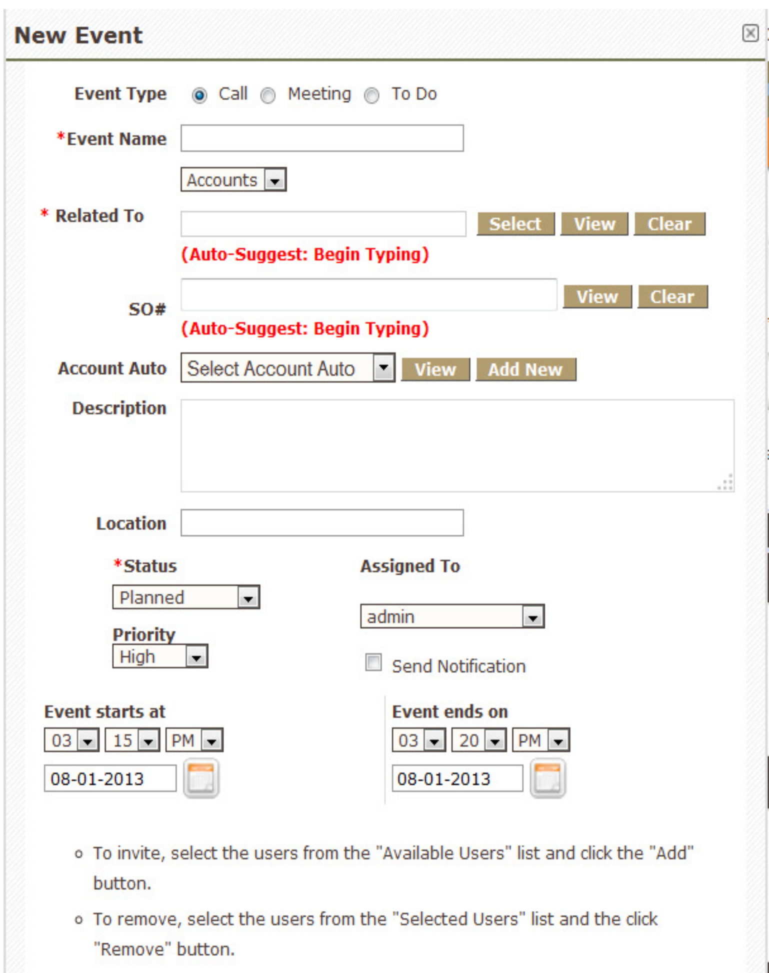
CALL / MEETING / TO DO: The interface for creating all three of these is the same with the options described below.

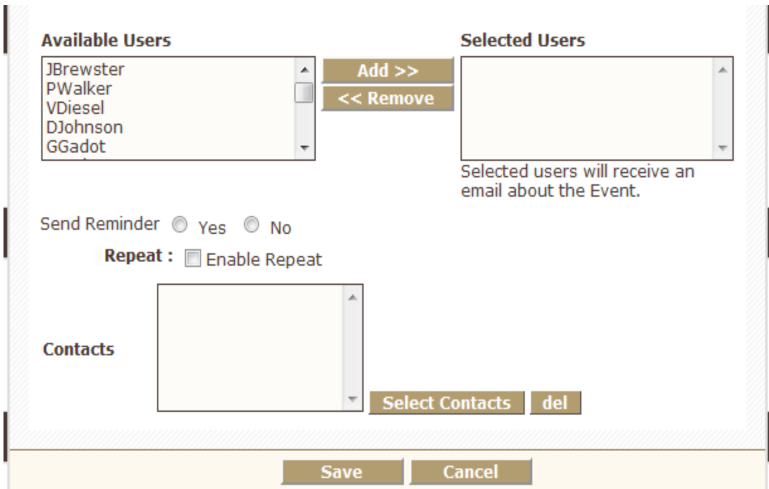
Event Type - Choose either call, meeting or to do
Event Name - Give your event a name
Accounts / Leads - Is the event related to an account or a lead? Choose with the drop down.
Related To - You can either put in the account (name or number) or lead name (you will get a drop down if more than one may apply) or use the SELECT button to see a list of all accounts or leads.



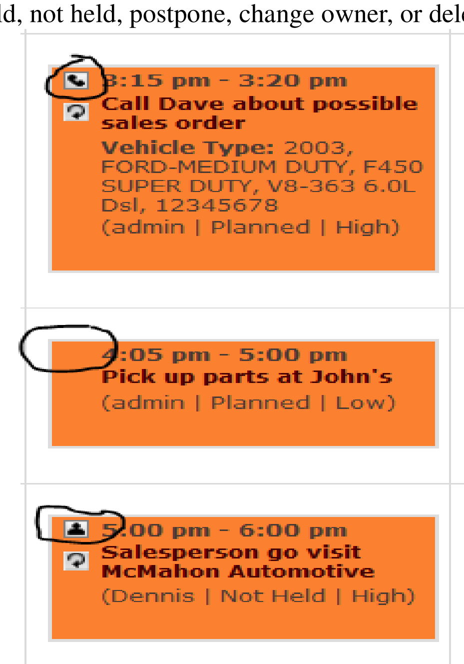

SO# - if the event is related to a Sales Order, enter the number here.
Account Auto - If the account has ACCOUNT AUTOs saved in it's account record, you can access them here.
Description – Type in a description of what the event is intended for.
Location – Where will the event take place, what phone 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.

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 -

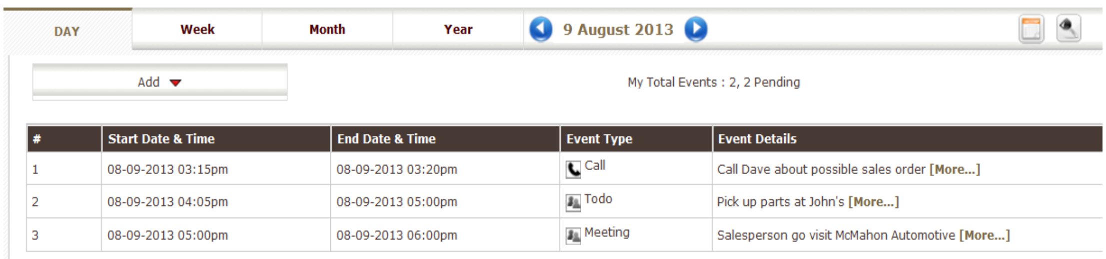




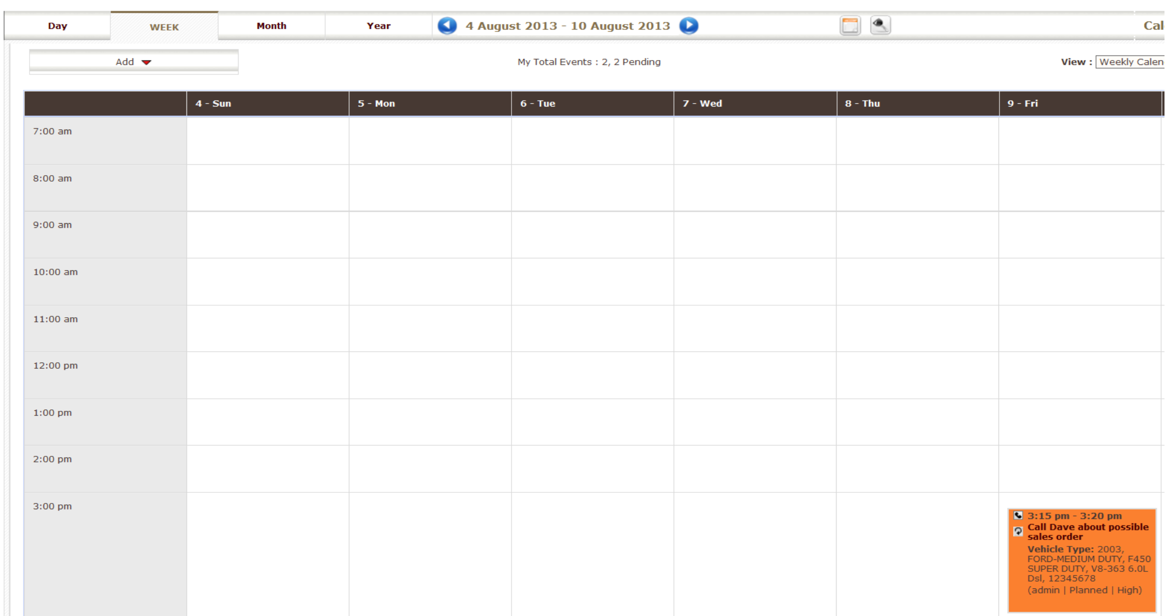

Once you have set up Calls, Meetings, or To Dos they will be displayed on the calendar. Calls will have a phone icon, meetings a person icon, and to dos will have no icon at the top left of the event. If you hover over the event you will see a small + (plus symbol) at the top right. If you click it the 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.



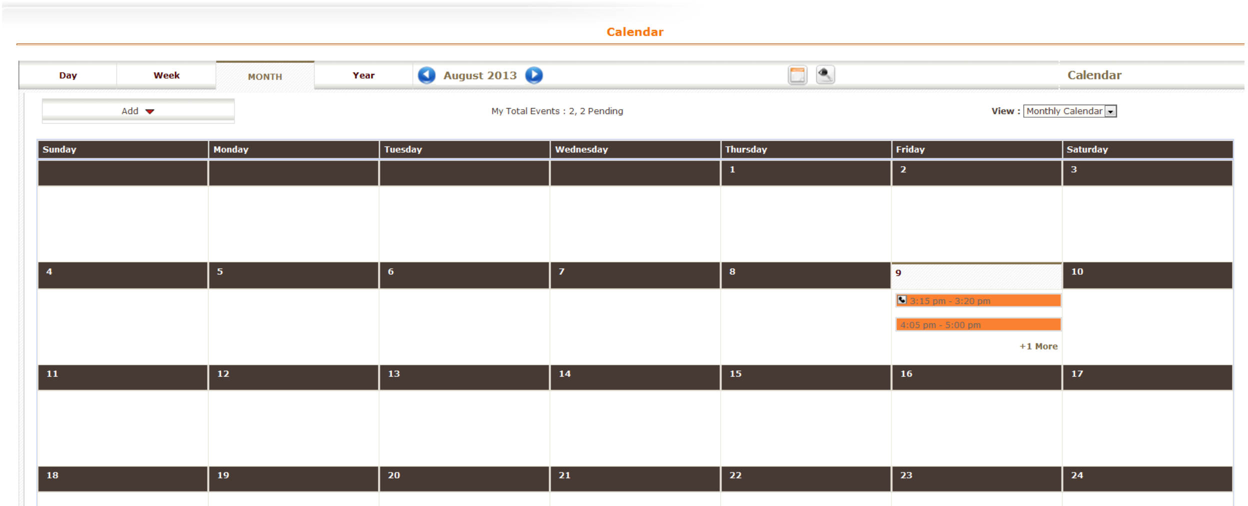
Day View............



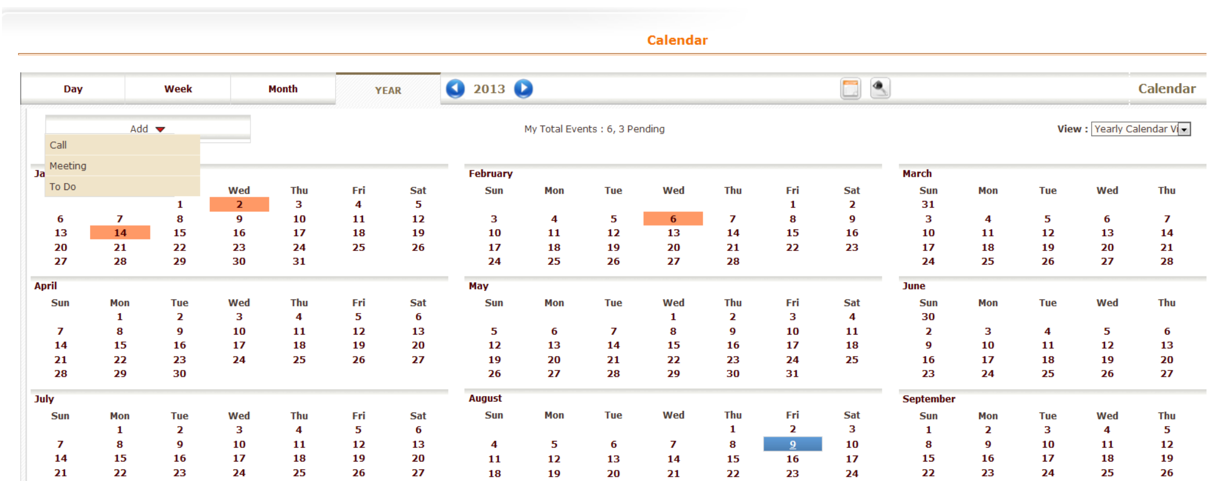

Week View.............



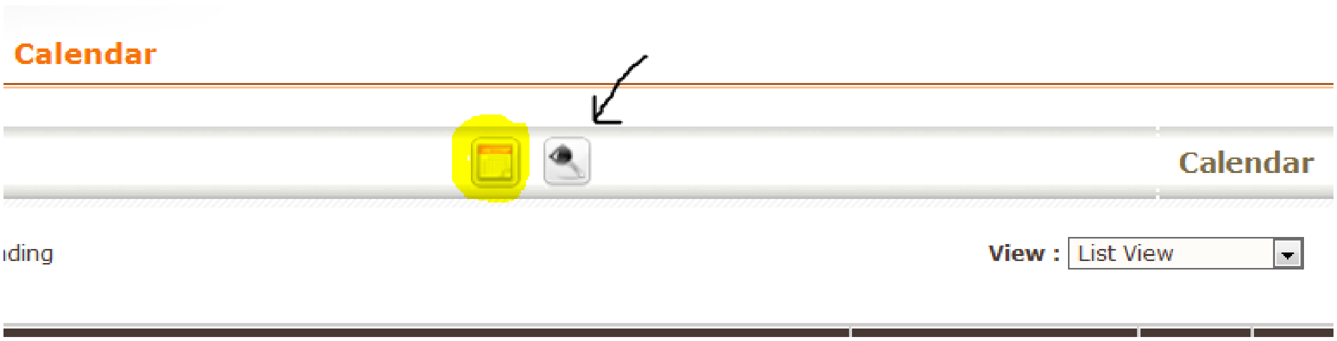

Month View............




Year View............

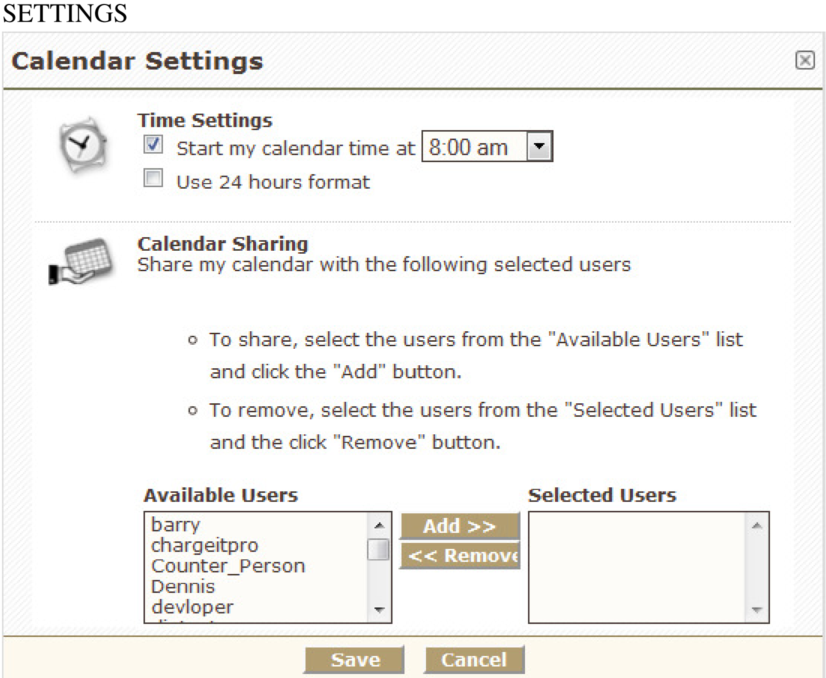



At the top right of the calendar there are a few more options available to you. The icon highlighted in yellow is the open calendar button. When you click it, it opens up a monthly calendar and allows you to choose which day you want to look at. The button with the arrow pointing at it is the settings 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.



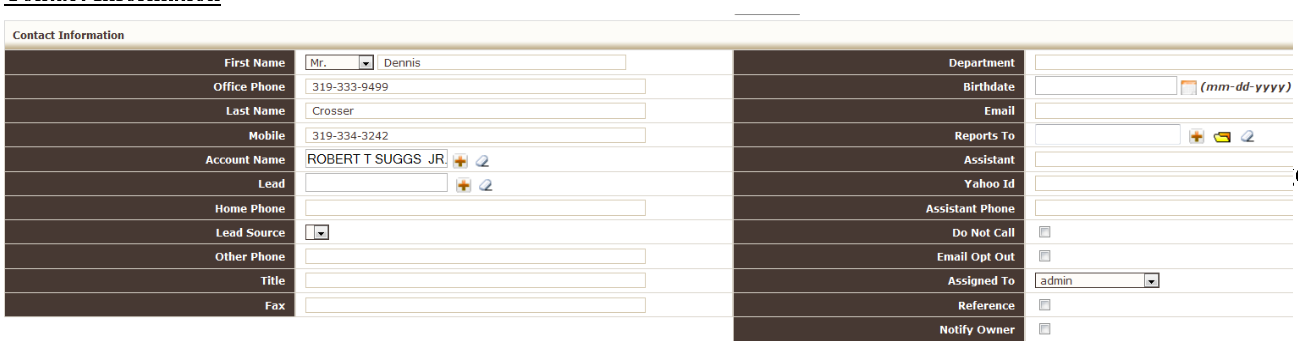

OPEN CALENDAR


SETTINGS



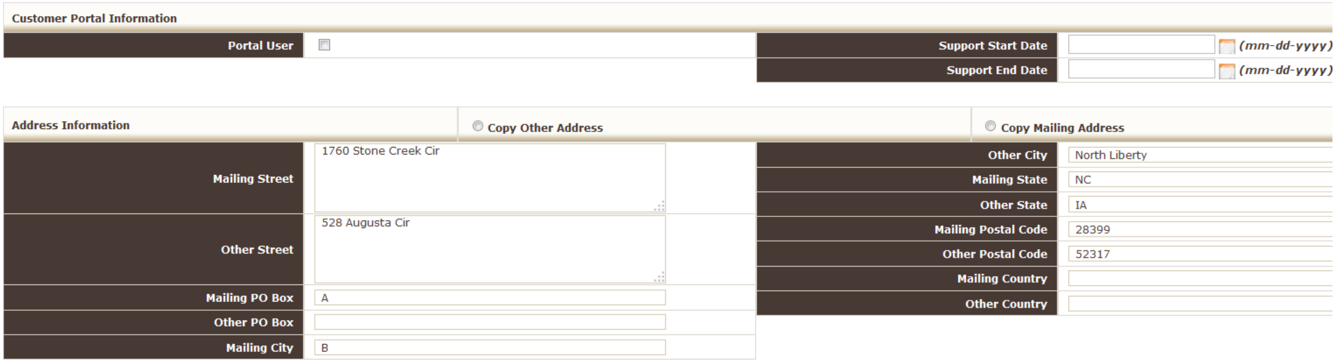
# SALES MANAGEMENT > CONTACTS

Contact Information



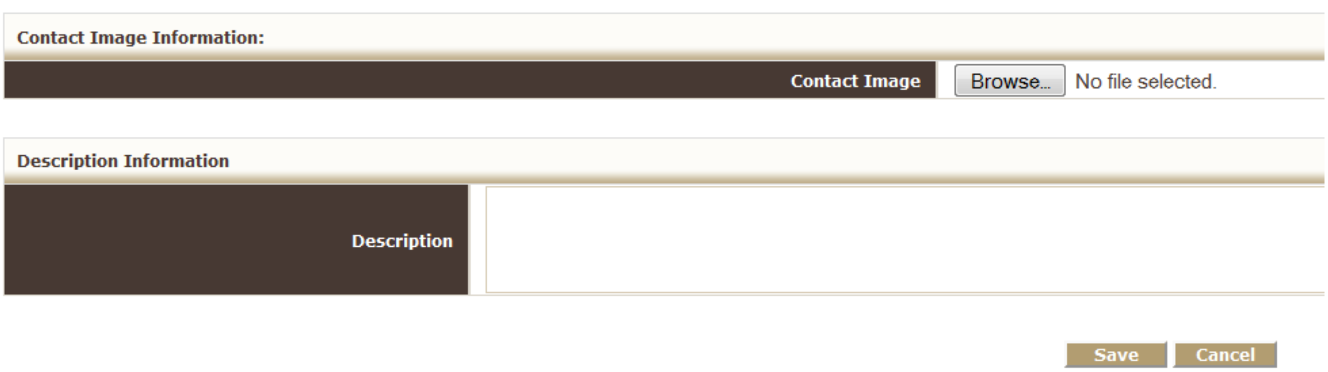
First Name – Choose prefix and first name of the contact.
Office Phone - Enter the contacts phone number.
Last Name – Enter the contacts last name.
Mobile – Enter the contacts mobile / cell phone number.
Account Name – Use the + (plus) button to access a list of all of the accounts in your Fuse5 system 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




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 -

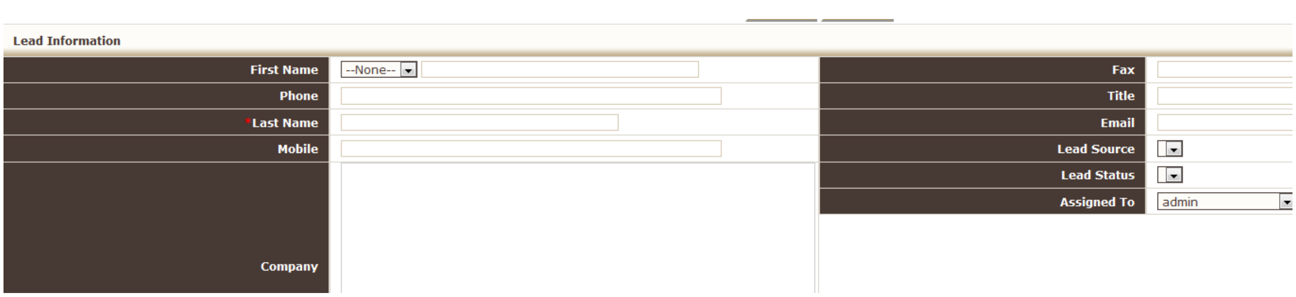
<u>Contact Image Information / Description Information</u>




Contact Image -
Description -

# SALES MANAGEMENT > LEADS

Lead Information



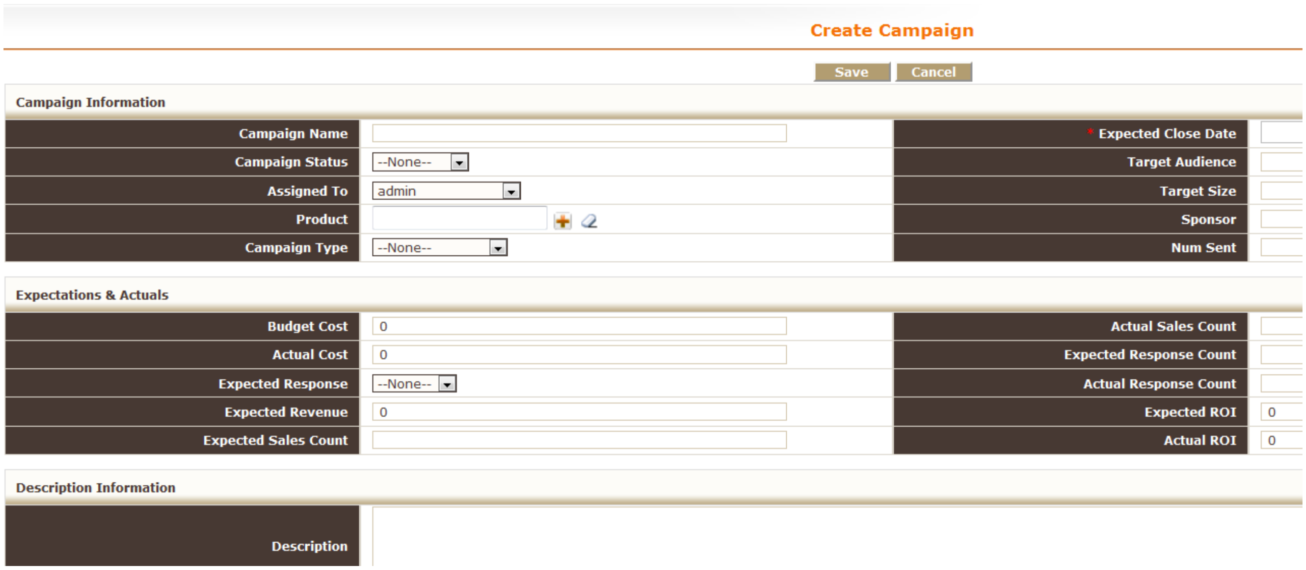

**First Name –** Enter first name of lead.

**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


**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




**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 you 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.