

strategy *Live!*

Totally Internet Based Software

CRM

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Dashboard Tab

The dashboard can be access by going to Sales > Dashboard.

Calendar

You can view and manage your calendar entries from here. Click the New button to create a new entry or click the calendar item to view and mark the item as closed.

Contact Search/Create

You can search for a contact by typing part of their first name and pressing the Tab key. You can create a new contact by clicking the New button and entering the information.

Tasks

You can view and manage your current and past due task entries from here. Click the New Task link to create a new entry or click the task list item to view and mark the item as closed.

Contacts Tab

You can view and manage your contact database from here. You can view the contact details by clicking the create date or you can add a new contact by clicking the Create button.

New Task

Click the New Task button from within a contact record to create a task regarding this contact.

New Calendar

Click the New Calendar button from within a contact record to create a calendar item regarding this contact.

Book New Load

Click the Book New Load button to create a load for the customer assigned to the contact.

Tasks Tab

You can view and manage your task list from here. You can view the task details by clicking the description or you can add a new task by clicking the Create button.

Close Tasks

You can close a task by clicking the description and checking the Closed box.

Calls Tab

You can view and edit your calls from here. You can view the call details by clicking the date.

New calls are entered by pulling up the contact on the Dashboard tab or the Contacts tab. Enter the details of the call in the blank space near the bottom and click Save.

Calendar Tab

You can view and manage your calendar items from here. You can view the item details by clicking the description or you can add a new item by clicking the Create button.

Close Calendar Items

You can close a calendar item by clicking the description and checking the Closed box.