2009

PlanPlus™ Online

System Administration 1

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COMPLETExRM

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PlanPlus Online

System Administrator Training

By COMPLETExRM

Acknowledgments

COO ....Keith Norris

Director of Operations & Education .... Nick Morgan

This course and all materials supplied to the student are designed to familiarize the student with the operation of software programs. We urge each student to review the manuals provided by the software publisher regarding specific questions as to the operation of the programs.

About This Class

COMPLETExRM courses are designed to provide learners with content that enhances their proficiency in the application, which in turn improves their job performance. Manuals contain:

- Performance-based objectives.
- Content that is relevant to job performance.
- Lab experiences that demonstrate transferable learning through performance exercises that measure all levels of learning.

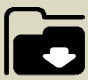
Performance Labs – Each unit ends with a performance lab to help you learn the material in the unit. One section of the performance lab allows you to practice the skills in the unit, while another section allows you to apply your knowledge.

Special symbols – The manual uses two symbols that have special meanings. Look at the samples below for an explanation of each symbol:

✪ This symbol points out a note of additional information.

✂ This symbol indicates a shortcut for a procedure you just learned.

Instructor Guide symbols

Icon	Description
	Indicates a timing suggestion.
	Indicates a potential problem area.
	Suggests sample questions.
	Indicates an area where explanation is required.
	Indicates a file or folder that you should open.
	Indicates a step or procedure you should follow.
	Indicates a note of interest or additional material beyond what is in the student manual.

Class Objectives

In this course, you will learn how to:

- Create and manage individual user accounts and your corporate account.
- Configure users, roles, and access sharing.
- Create custom fields and configure page layouts.
- Import data and configure Microsoft Outlook synchronization parameters.
- Create and use Email templates, Advanced Search, and Contact Lists.
- Use the Process Builder application to track your business processes in PlanPlus Online.
- Configure and create views and reports.
- Use Advanced Features, including Lead Boomerang, External Pages, Recycle Bin, Merging Records, and Calendar Color Options.

Table of Contents

Unit 1: PlanPlus Online Administrator Overview and Navigation Basics

Unit Objectives:

- Understand GoToMeeting settings (optional).
- Create a user account.
- Complete the **Account Setup Wizard**.

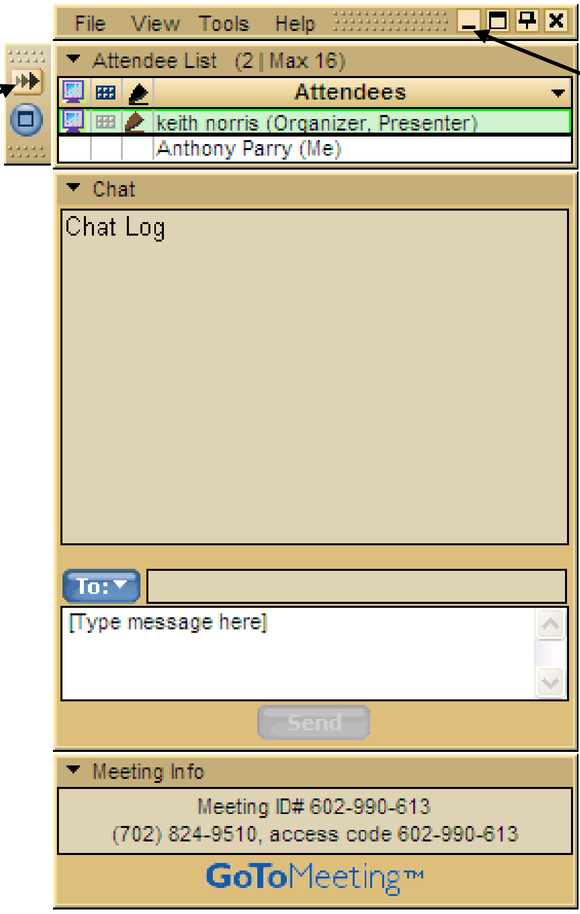
Lesson 1: Using GoToMeeting

Throughout this online training, we will be using the online meeting site GoToMeeting.com. GoToMeeting is a very effective tool for delivering online training. It is our goal to help you understand the basic functions of GoToMeeting so that your training is both informative and enjoyable.

The following is a brief overview of GoToMeeting.

- ✪ This overview assumes you have already logged in to GoToMeeting for the webinar.

After you have joined the meeting, GoToMeeting displays the following menu.



Click here to minimize the menu so it appears like this.

To reopen the menu, click on the arrow again.

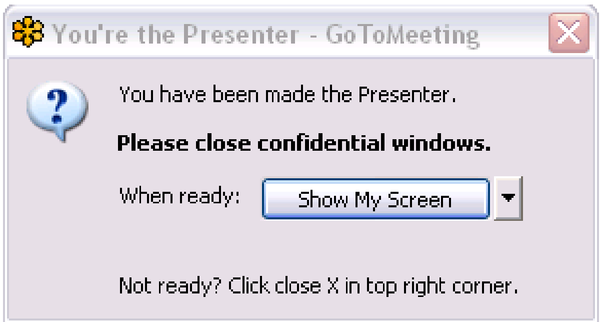
Click here to minimize the menu and the presenter's screen. To reopen the presenter's screen and the menu, click on the GoToMeeting logo in the Windows Taskbar.

1. Throughout the training, you will need to have another browser window open so you can work inside the PlanPlus Online application. To do this, click on the Windows **Start** menu and open a new browser window.

2. Type **www.planplusonline.com** in the **Address** bar and press the **Enter** key.

   ✪ To toggle between the two applications (GoToMeeting and PlanPlus Online), click on the application in the Windows Taskbar or press the **Alt/Tab** keys.

3. To make the training a hands-on experience, the GoToMeeting presenter might occasionally choose to make you the presenter. When this happens, GoToMeeting displays the following pop-up window on your screen.



4. Once you have closed any confidential applications, click on the **Show My Screen** button and GoToMeeting will project your screen to all attendees.

Lesson 2: Creating a User Account

As an **Administrator** of the PlanPlus Online application, you will spend the majority of your time performing system functions for your clients, such as creating user accounts and configuring the look and feel of the application in accordance with the industry and line of work.

To create a user account, use the following steps:

1. Open the **https://www.planplusonline.com/AdminAccount** web site.

   PlanPlus Online displays the **Account Setup** page.

2. Enter your information in the **ABOUT YOU** section.

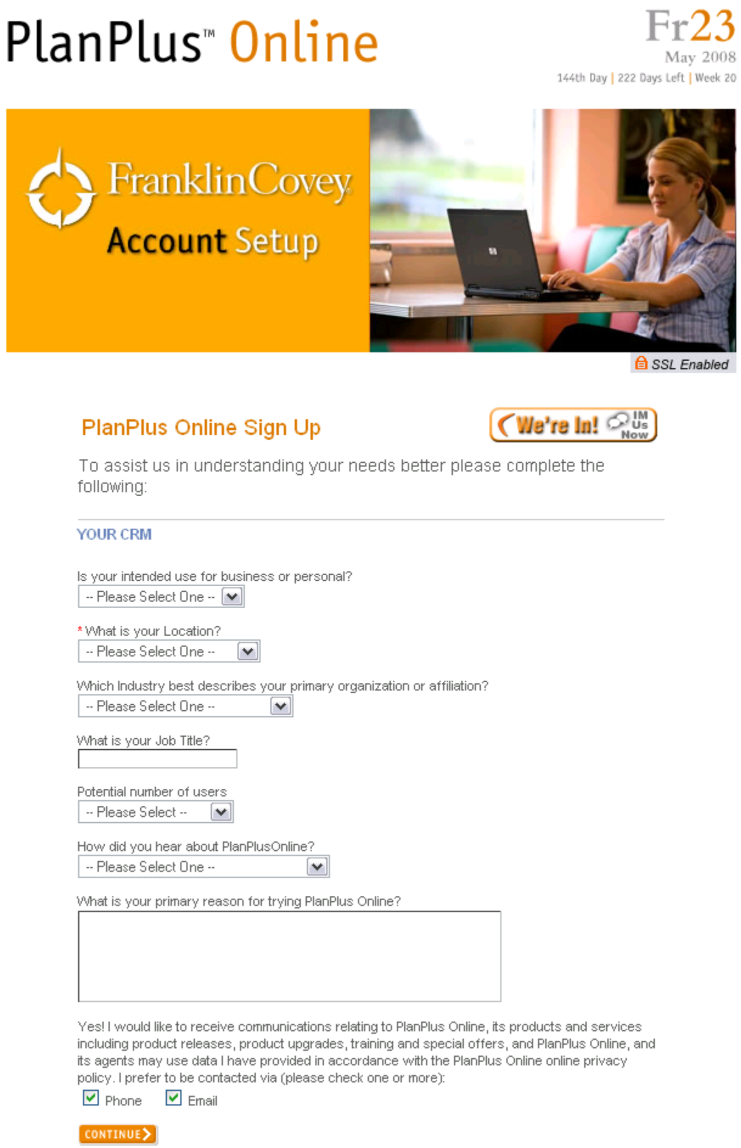
3. Enter your account name in the **Account Name** field.

4. Select the **Terms & Conditions** check box to indicate you have read the terms and conditions.

   ✪ To read the terms and conditions, click on the **Terms & Conditions** link. PlanPlus Online opens a separate window containing the terms and conditions. Close the window when you are finished.

5. Click on the **CONTINUE** button.

   PlanPlus Online displays the following page.



6. Select or enter the necessary information.

7. Select or clear the **Phone** and **Email** check boxes to specify how you would like to receive information from PlanPlus Online.

8. Click on the **CONTINUE** button.

PlanPlus Online displays the following page.

9. Confirm that the **Final Price** is **0.00** and click on the **CONTINUE** button.

PlanPlus Online displays the following page.

Congratulations! You have just successfully set up a new account.

- Make a note of your login information (**Account Name**, **User Name**, and **Password**). This is the account that you will use throughout this training course. The login information is case sensitive.

- To access the PlanPlus Online site, click on the **www.planplusonline.com** link on the current page or type **www.planplusonline.com** in the **Address** bar and press the **Enter** key.

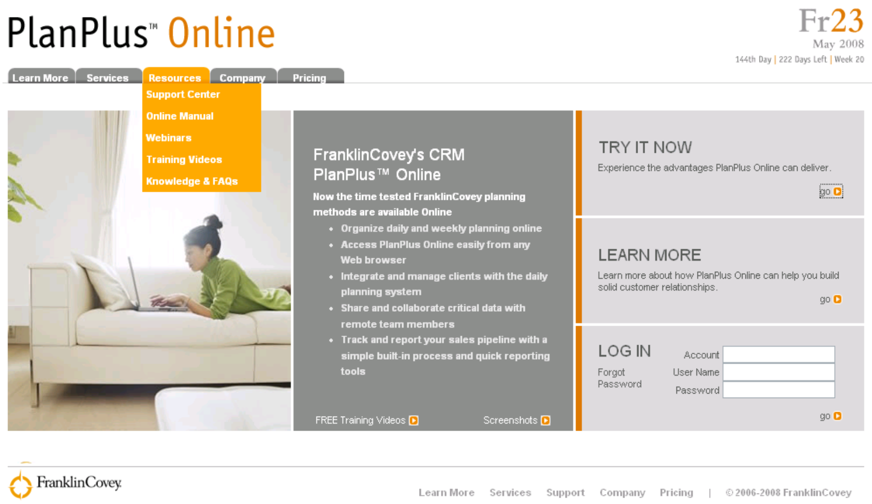
Lesson 3: Completing the Setup Wizard

When new users log in for the first time, PlanPlus Online automatically launches the **Account Setup Wizard**. The **Account Setup Wizard** allows users to configure their default settings for the application.

To complete the **Account Setup Wizard**, use the following steps:

1. Open the PlanPlus Online web site, if necessary, by entering **www.planplusonline.com** in the **Address** bar of your browser and pressing the **Enter** key.

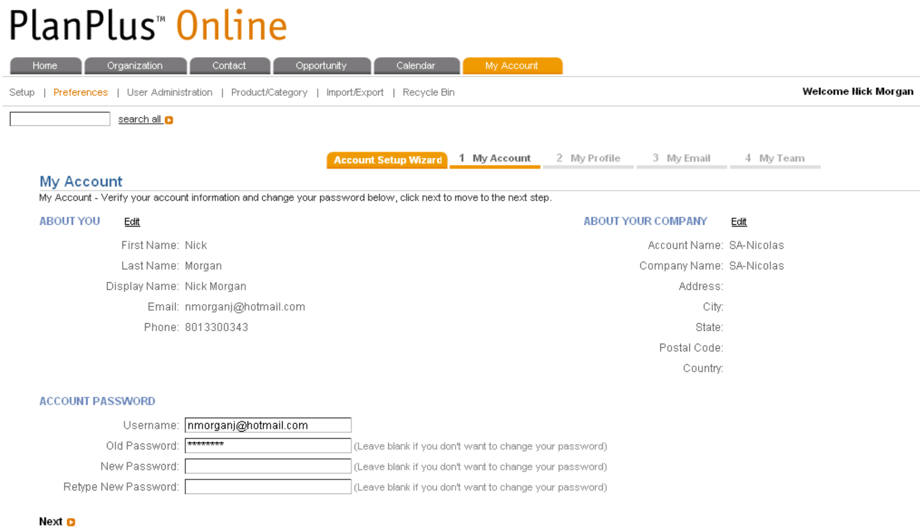
   PlanPlus Online displays the login page.



2. Enter your login information in the **Account**, **User Name**, and **Password** fields and click on **go**.

   ✪ Remember, passwords are case sensitive.

PlanPlus Online displays the **My Account** page of the **Account Setup Wizard**.



✪ If PlanPlus Online displays an announcement page, click on the **Continue** button at the bottom of the page to access the **Account Setup Wizard**.

3. To edit any of your personal information, click on the **Edit** link next to **ABOUT YOU**.

   PlanPlus Online activates the fields so that you can edit their contents.

4. Make any necessary changes.

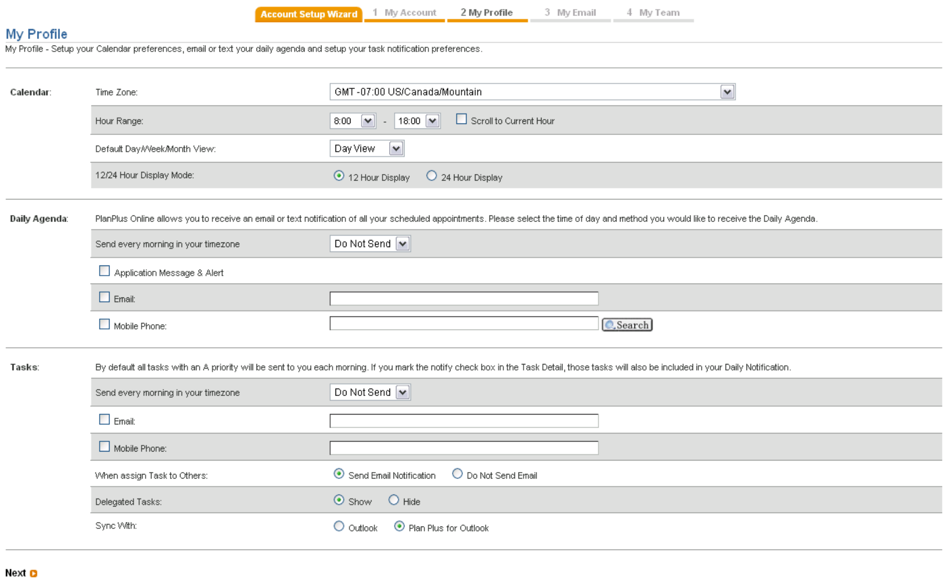
5. To edit any of your company information, click on the **Edit** link next to **ABOUT YOUR COMPANY** and make the necessary changes.

6. To change your username, enter a new username in the **Username** field.

7. To change your password, enter a new password in the **New Password** and **Retype New Password** fields.

8. When you are finished, click on **Next**.

PlanPlus Online displays the **My Profile** page of the **Account Setup Wizard**.



✪ This is the page where you will configure your calendar defaults and your daily agenda and task notification preferences. These settings affect your account only - other users in your organization are not affected by the changes you make here.

9. Configure your default calendar settings by choosing your **Time Zone**, **Hour Range**, **Default Calendar View**, and **12/24 Hour Display Mode**.

✪ PlanPlus Online can notify you of your scheduled appointments each day by delivering an application message, an email, or a text message to your mobile phone.

10. To configure the **Daily Agenda** notification settings, click on the **Send every morning in your timezone** drop-down menu and click on the time of day you would like to receive the notification.

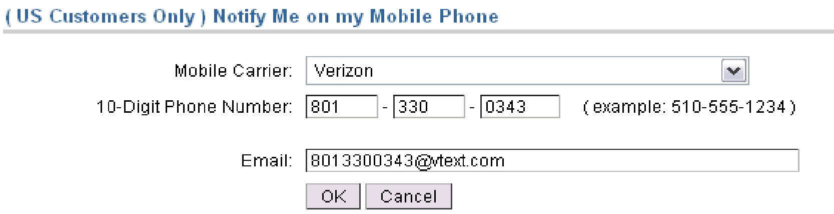
✪ If you do not want to receive a notification, leave the setting as **Do Not Send**.

11. Select the check box for the method(s) you would like to use to receive the notification.

12. If you selected **Email**, enter your email address in the field.

13. If you selected **Mobile Phone**, click on the **Search** button for the **Mobile Phone** field.

PlanPlus Online displays the **Notify Me on my Mobile Phone** page.



14. Click on the **Mobile Carrier** drop-down menu and choose your mobile provider from the list.

15. Enter your mobile number in the **10-Digit Phone Number** field.

16. Enter your email address in the **Email** field.

17. When you are finished, click on the **OK** button.

    PlanPlus Online returns you to the **My Profile** page of the **Account Setup Wizard**.

    ✪ PlanPlus Online can also notify you of all tasks with an **A** priority each day. You can also select the **Notify** check box in any **Task Detail** to include that task in your daily notification.

18. Repeat steps 10-17 to specify the time and delivery method for the task notification, if necessary.

    ✪ In addition to the notification settings, you can also set several other default task settings.

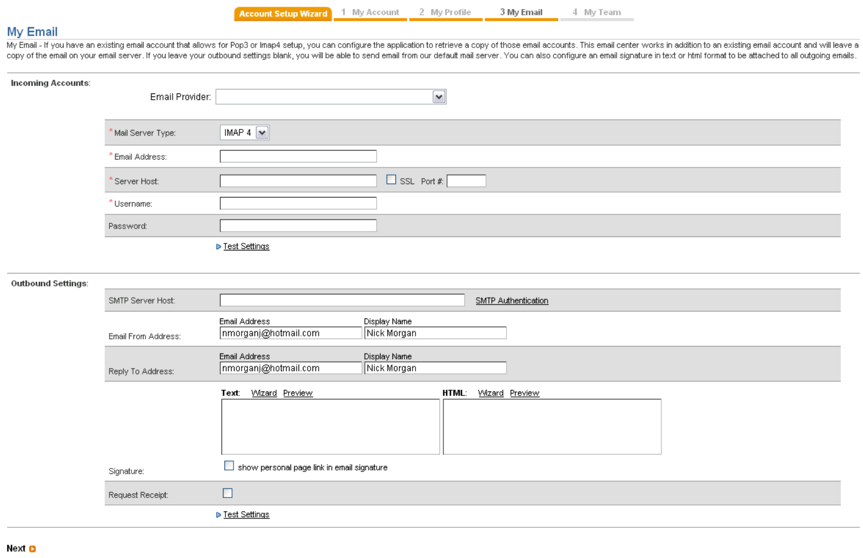
19. By default, PlanPlus Online sends an email to another user when you assign him or her a task. If you do not want to send this email, click on the **Do Not Send Email** option for the **When assign Task to others** field.

20. By default, PlanPlus Online shows delegated tasks in your **Daily Tasks** list. If you do not want to show delegated tasks, select the **Hide** option for the **Delegated Tasks** field.

21. By default, you can synchronize your **Daily Tasks** list with Microsoft Outlook. If you want to allow your **Daily Tasks** list to be synchronized with **Franklin Covey's Plan Plus for Outlook**, select that option for the **Sync With** field.

22. When you have configured the profile settings, click on **Next**.

PlanPlus Online displays the **My Email** page of the **Account Setup Wizard**.



✪ You can receive email from an existing email account within PlanPlus Online by specifying the account settings.

23. In the **Incoming Accounts** section, choose your email provider from the **Email Provider** drop-down menu.

✪ PlanPlus Online will automatically enter the correct settings in the **Mail Server Type** and **Server Host** fields based on your selection.

24. Enter your email address in the **Email Address** field.

25. Enter your email username and password in the **Username** and **Password** fields.

26. When you are finished, click on the **Test Settings** link to make sure you have configured the settings correctly.

✪ PlanPlus Online opens a separate window to test the settings. If the test is successful, PlanPlus Online displays a **Test Success** message. Click on the **Close** button. If the test is not successful, return to the **My Email** page and correct the settings.

✪ In addition to receiving inbound email messages, you can also send messages from within PlanPlus Online. If you leave the settings in the **Outbound Settings** section blank, you can send email messages using the PlanPlus Online default mail server. If you would like to send messages from another email server, enter the appropriate information.

27. In the **Outbound Settings** section, enter the SMTP server host in the **SMTP Server Host** field.

- ✪ If you are uncertain of your email provider's **SMTP** settings, you can usually find them by going to Google and searching for **<provider name> SMTP settings**.

28. Click on the **SMTP Authentication** link.

    PlanPlus Online displays additional fields.

29. Enter the **Username**, **Password**, and **Port #** for your email account.

30. If your email provider uses Secure Socket Layer, select the **SSL** check box.

31. Enter your email address and display name in both the **Email From Address** and **Reply To Address** fields, if necessary.

32. To choose a text email signature, click on the **Wizard** link for the **Text** box and select the signature you want to use. Update the information as necessary and click on the **Update** button when you are finished.

33. To choose an HTML signature, click on the **Wizard** link for the **HTML** box and select the signature you want to use. Update the fields as necessary and click on the **Update** button when you are finished.

    - ✪ An HTML signature gives you the ability to add extra formatting. A Plain text email does not offer the same formatting options.

    - ✪ If you select the **Show personal page link in email signature** check box, PlanPlus Online includes the link for your external page in your email signature. For more information on **External Pages**, refer to **Unit 8: Advanced Features**.

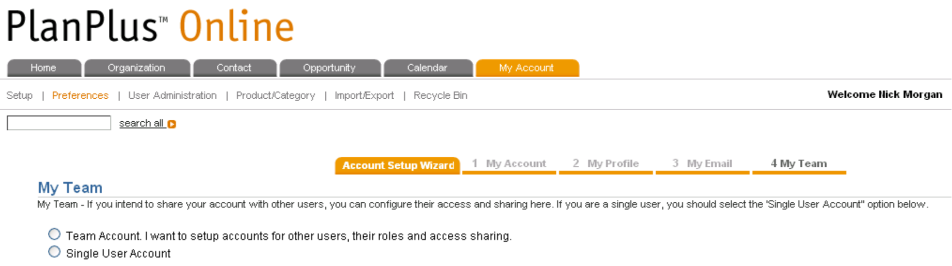
    - ✪ To include a receipt request with your outbound messages, select the **Request Receipt** field.

34. When you are finished, click on the **Test Settings** link to make sure you have configured the settings correctly.

    - ✪ PlanPlus Online opens a separate window to test the settings. If the test is successful, PlanPlus Online displays a **Test Success** message. Click on the **Close** button. If the test is not successful, return to the **My Email** page and correct the settings.

35. When you are finished configuring your email settings, click on **Next**.

PlanPlus Online displays the **My Team** page of the **Account Setup Wizard**.



36. To specify whether your account will be shared with other team members or if you are a single user, click on **Team Account** or **Single User Account**.

    Once you make a selection, PlanPlus Online displays the **Finish** button.

37. Click on **Finish** to complete the **Account Setup Wizard**.

    PlanPlus Online displays the **Home** page.

✪ If you selected **Team Account**, PlanPlus Online displays the **Manage License** page of the **Subscription & User Setup** wizard so that you can set up the additional users for your team. For more information on setting up additional users, refer to **Unit 2: Users and Roles**.

✂ You can also access the **Account Setup Wizard** by clicking on the **My Account** tab, clicking on the **Setup Wizard** heading, and clicking on the **Quick Start Setup Wizard** link

Unit Performance Lab

Perfecting Your Skills

1. Access the **My Profile** page of the **Account Setup Wizard** and change the time zone to MST.

2. Also on the **My Profile** page of the **Account Setup Wizard**, set your Daily Agenda and Tasks notifications to be emailed to you at 7AM daily. Move to the next page of the **Account Setup Wizard**.

3. On the **My Email** page of the **Account Setup Wizard,** choose one of the default text email signatures. Move to the next page of the **Account Setup Wizard** and then return to the **Home** page.

Applying Your Knowledge

1. Once you have completed the **Account Setup Wizard**, how would you add another email account to your personal PlanPlus Online account?

2. Are the changes that you make during the **Account Setup Wizard** going to affect the settings for all users for whom you are an administrator or just your own?

Performance Lab Answers

Perfecting Your Skills

1. Click on the **My Account** tab.
   Click on the **Setup Wizard** heading.
   Click on the **Quick Start Setup Wizard** link.
   Click on the **My Profile** tab of the **Account Setup Wizard**.
   Click on the **Time Zone** drop-down menu and click on the MST time zone.
2. From the **Daily Agenda** section of the **My Profile** tab, select **7 am** from the **Send every morning in your timezone** drop-down menu.
   Select the **Email** check box and enter your email address in the field.
   Repeat the above steps for the **Tasks** section.
   Click on **Next**.
3. From the **Outbound Settings** section of the **My Email** tab, click on the **Wizard** link for the **Text** box.
   Click on one of the signature styles.
   Click on the **Update** button.
   Click on **Next**.
   Click on the **Home** tab.

Applying Your Knowledge

1. You can access the **My Email** tab of the **Account Setup Wizard** by clicking on the **My Account** tab, clicking on the **Setup Wizard** heading, clicking on the **Quick Start Setup Wizard** link, and clicking on the **My Email** tab. You can also access the email account setup options through the **Email Center**. To access the **Email Center**, click on the **Email Center** heading located on the right side of the Sub Menu and then click on the **Email Account Setup** option.

2. The changes you make during the **Account Setup Wizard** are just for the individual user who is making the changes. They will not affect the company template or settings.

Unit 2: Users and Roles

Unit Objectives:

- Create and manage user roles to control access to data, pages, and views in PlanPlus Online.
- Create and edit user accounts and groups.
- Configure and use calendar sharing.

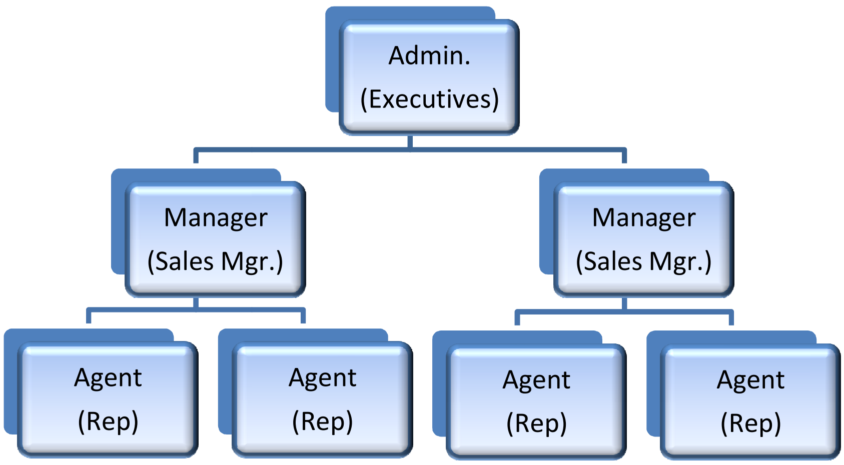
Lesson 1: Managing Roles

PlanPlus Online relies on roles to determine the pages, views, and data each user can access in the application. All users need a role attached to their user account in order to access the system. Some users need access to the entire system while others only need access to their own specific information. For example, consider an organization with an Executive team, Sales Managers, and Sales Reps. Each of these individuals has important duties to perform, but not all of them need the same access to information. Consider whether you would want Sales Reps to be able to modify user accounts or edit their manager's **Contacts** database. On the other hand, however, an executive or manager might need access to these things on a regular basis.

PlanPlus Online includes the following default roles:

- **Administrator** - This role grants access to the entire application, including the ability to set up and manage user accounts. You would use this role for the administrator of the system as well as executives and other high-level employees who need full access to the application.
- **Manager** – This role is designed for managers, directors, and any other positions that have other employees reporting to them. Users with the Manager role can access their own information as well as their team's information. When pulling reports or queries, PlanPlus Online includes only the information that falls within the Manager's team or group that they are actively managing.
- **Agent** – This role is used for all other users. It grants users access to their own information. A user who has been assigned the **Agent** role can also see information relating to their team if the Administrator of the account configures the role with those privileges.

The Illustration below outlines the three default roles used in PlanPlus Online.



As you can see, the default roles work according to a hierarchy system. Based on the previous example, Administrators would have access to the entire database; the Managers would have access to only the data for their team of Agents, and the Agents would have access to their information only.

Creating and Editing a Role

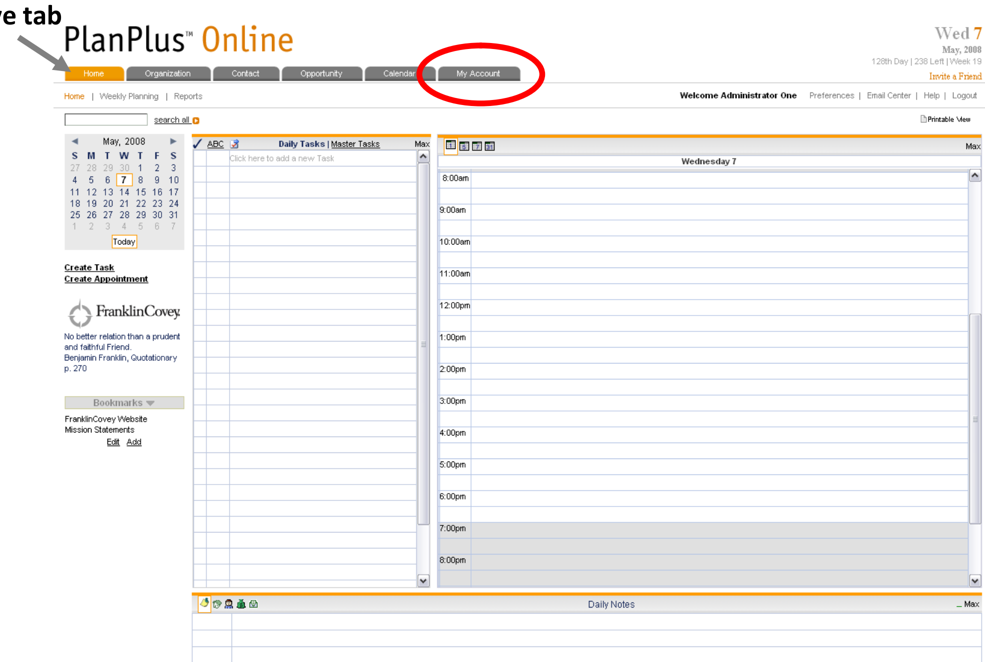
Before users can log in to the system, you will need to assign them a role. You can use one of the three default roles provided in PlanPlus Online, or you can create your own customized roles if you want more control over the pages, data, and views that each role can access. You can also assign users more than one role and specify which role should be the default role. Users who have more than one role can switch back and forth between the roles as necessary. You might want to create a new role if you have a position that doesn't fit within one of the default roles; for example, if you have a District Manager with several Sales Managers reporting to her.

To create a new role, use the following steps:

1. Log in to PlanPlus Online, if necessary.

   PlanPlus Online displays the **Home** page.

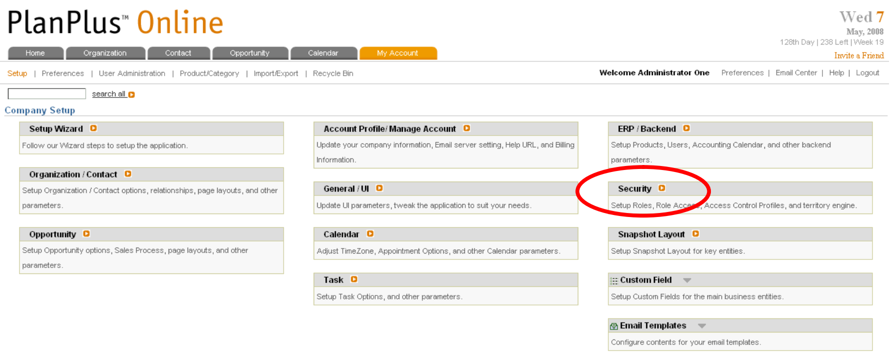
Active tab



✪ The active tab on the page is always highlighted in orange.

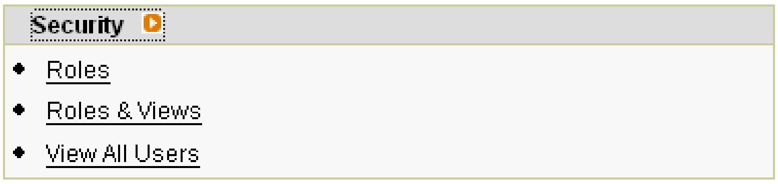
2. Click on the **My Account** tab.

PlanPlus Online displays the **My Account** page.



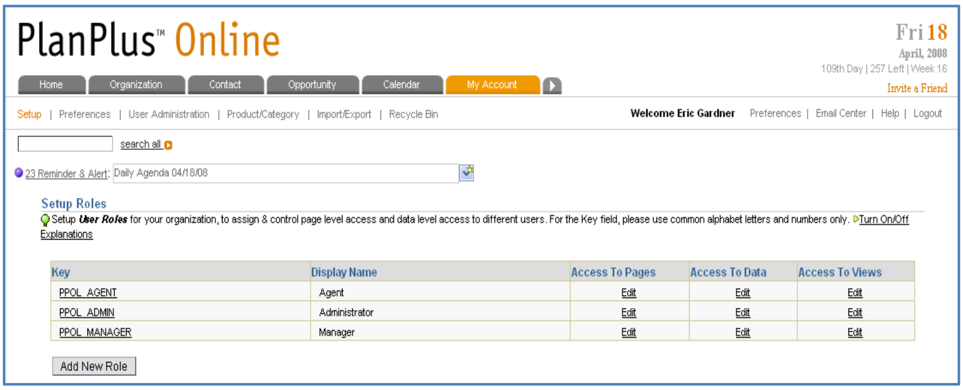
3. Click on the **Security** heading.

PlanPlus Online displays the **Security** section menu:



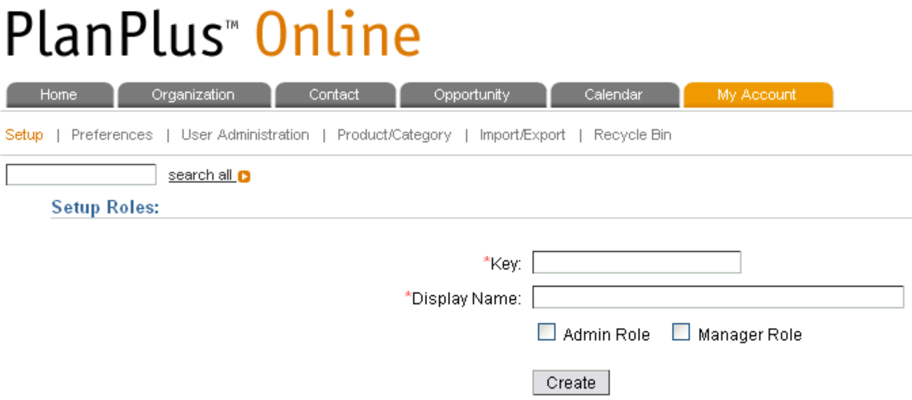
4. Click on the **Roles** link.

PlanPlus Online displays the **Setup Roles** page.



5. Click on the **Add New Role** button in the bottom-left corner of the page.

PlanPlus Online displays the **Setup Roles** page.



✪ Fields identified with a red asterisk (*) are required.

6. Enter the name you want to use to save the new role in the **Key** field.

   ✪ The **Key** field is not editable. Be sure the name is typed correctly before you click on the **Create** button.

7. Enter the display name for the new role in the **Display Name** field.

   ✪ The **Display Name** field is editable.

8. If you want to base the new role on either the default Admin role or the default Manager role, select the appropriate check box.

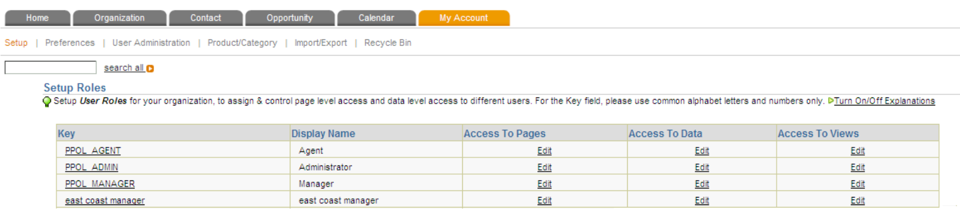
   ✪ If you base the new role on one of the default roles, PlanPlus Online applies the pages, data, and view access settings for that role to the new role. You can then customize the new role as necessary.

9. Click on the **Create** button.

   PlanPlus Online creates the new role and refreshes the **Setup Roles** page.

10. Click on the **Submit** button.

    PlanPlus Online displays the **Setup Roles** summary page.



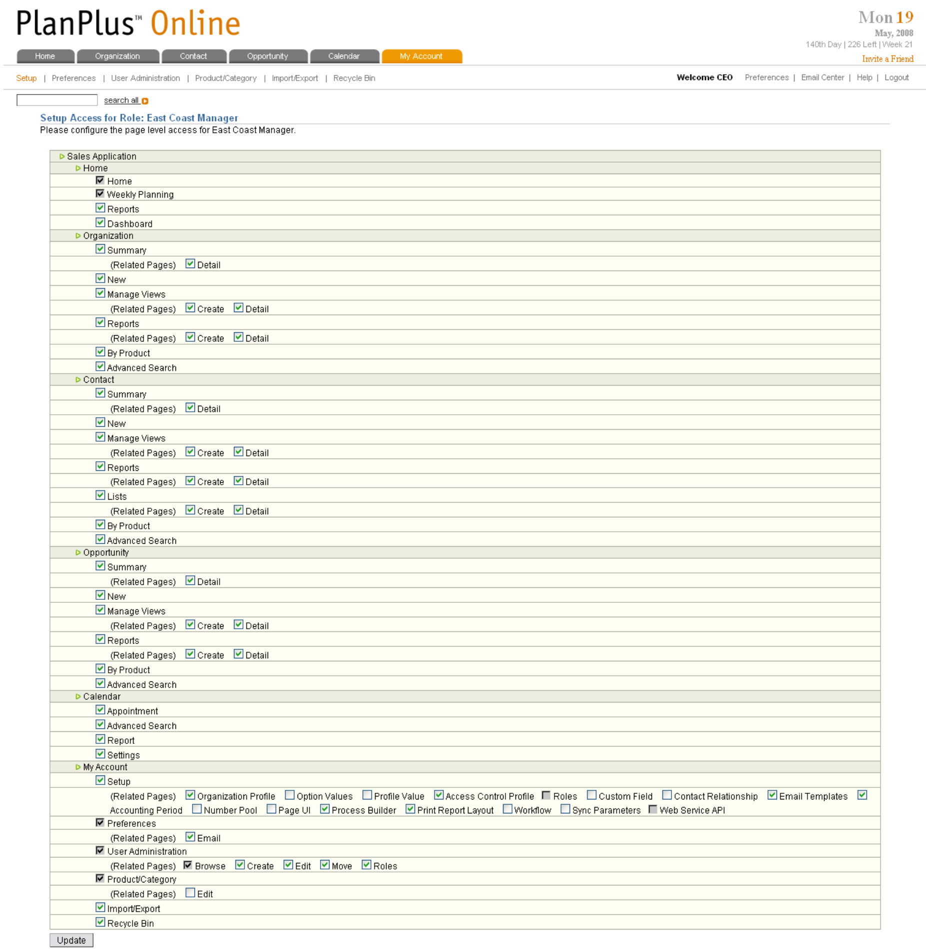
✪ You can define the page, data, and view access settings for the new role from this page.

The following table describes the three types of access you can set for the role:

Access Setting	**Description**
Page	Allows/Denies access to certain pages within the application, such as the Main Menu tabs and the Sub Menu tabs.
Data	Allows you to grant access to data records within the Organization, Contact, Opportunity, and Lead databases.
View	Allows/Denies access to certain views. You can also select a default view for each record type.

11. To set the page access for this role, click on the **Edit** link in the **Access To Pages** column for the role.

    PlanPlus Online displays the **Setup Access for Role** page.



- Each page has an associated check box. If you want the role to be able to access the page, make sure the check box is selected. If you don't want the role to be able to access the page, make sure the check box is cleared.

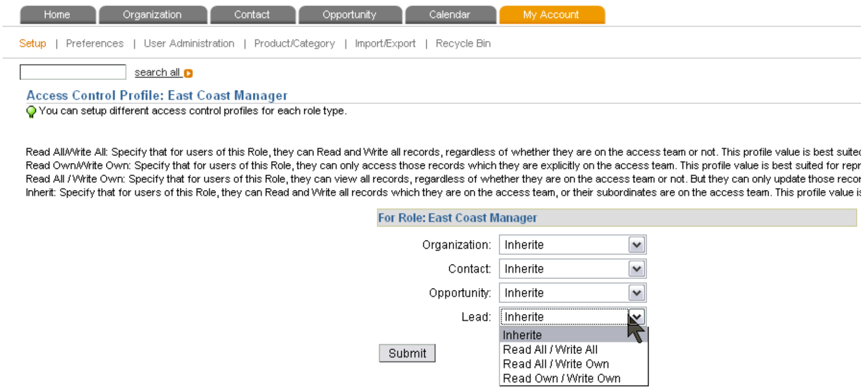
12. Select or clear the check boxes for the pages as necessary.

13. Click on the **Update** button located at the bottom of the page.

    PlanPlus Online returns to the **Setup Roles** summary page.

14. To set the data access for the role, click on the **Edit** link in the **Access To Data** column for the role.

    PlanPlus Online displays the **Access Control Profile** page.



You can select one of the following data access options for each of the four applications: **Organization**, **Contact**, **Opportunity**, and **Lead**:

Data Access Setting	Description
Inherit	Allows you to specify that users assigned to this role will inherit the data access settings of their supervisor.
Read All/ Write All	Gives users assigned to this role the ability to read and/or change all of the data in the particular application (Organization, Contact, Opportunity, Lead). This setting is best suited to Admin/Executive roles.
Read All / Write Own	Gives users assigned to this role the ability to read all of the data in the application while only allowing them to edit their own information.
Read Own / Write Own	Gives users assigned to this role the ability to read and edit only their own data in the application.

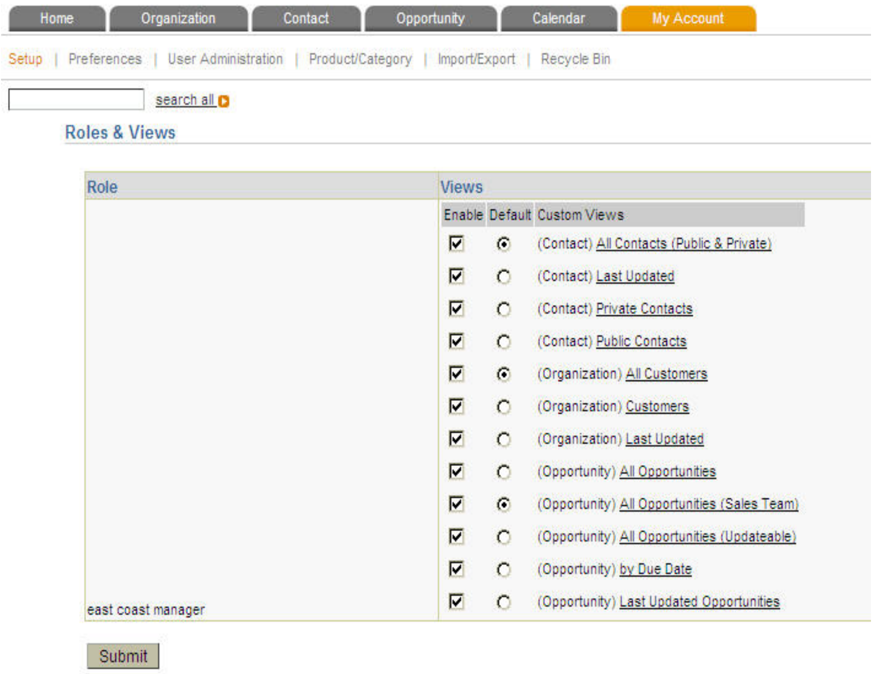
15. Click on the drop-down menu for each application and select one of the data access options.

16. Click on the **Submit** button when you are finished.

    PlanPlus Online returns you to the **Setup Roles** summary page.

17. To set the view access for the role, click on the **Edit** link in the **Access To Views** column for the role.

    PlanPlus Online displays the **Roles & Views** page:



- ✪ Each view has an associated check box. If you want the role to be able to access the view, make sure the check box is selected. If you don't want the role to be able to access the view, make sure the check box is cleared.

18. Select or clear the check boxes for the views as necessary.

19. In the **Default** column, select the default view for each application.

- ✪ The default view is the view that PlanPlus Online displays when a user with this role accesses each application.

20. Click on the **Submit** button when you are finished.

    PlanPlus Online returns you to the **Setup Roles** summary page.

🛠 ***Activity - Create another new role named West Coast Manager. Base the new role on the Manager role. Configure the Page, Data, and View access for the new role to be same as the East Coast Manager role.***

✪ To return to the PlanPlus Online Home page, click on the **Home** tab.

Lesson 2: Users

In this lesson, you will learn how to:

- add additional user licenses.
- create new users.
- assign roles to users.
- edit a user.
- create and edit user groups.

You can create an unlimited number of users in the PlanPlus Online system; however, users can only access the system if you have assigned them a role. Each assigned role correlates to a user license. For example, if you purchase 20 licenses, you can assign roles to up to 20 users. You might have more than 20 user accounts set up in the system, but only the 20 users with assigned roles can log in. The benefit of this is that you don't have to create and delete user accounts in order to manage access to the system. If an employee resigns and you hire another in his/her place, you can simply grant the same role to the new employee. The former employee's user account, and any data that it may contain, can remain intact within the system.

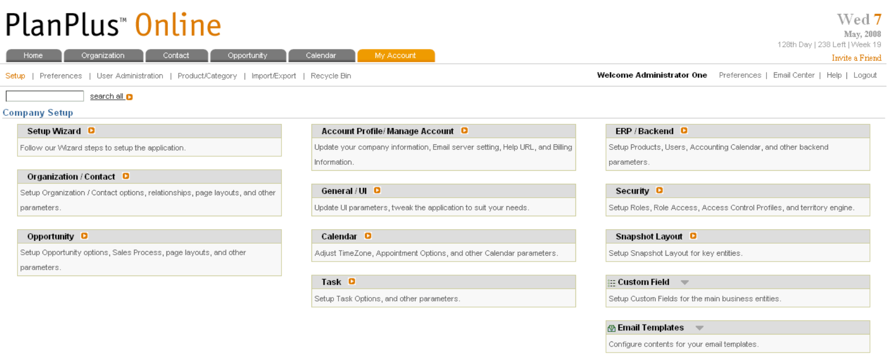
If your company has purchased 20 licenses, which are being used, you must purchase additional licenses if you have more than 20 users who need to log in. After you purchase the licenses, you can then create the users, assign them a role, and they will then be able to log in to PlanPlus Online. You can easily track both the number of allocated licenses your company has purchased, as well as the number of licenses that you are currently using.

Adding Additional Licenses

To allocate additional licenses to your company, use the following steps:

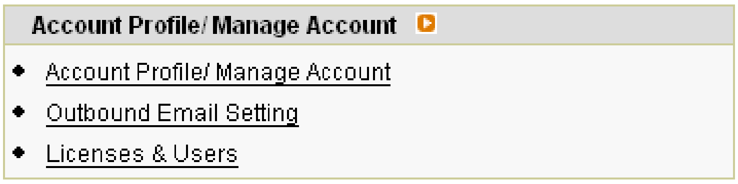
1. Click on the **My Account** tab.

   PlanPlus Online displays the **My Account** page:



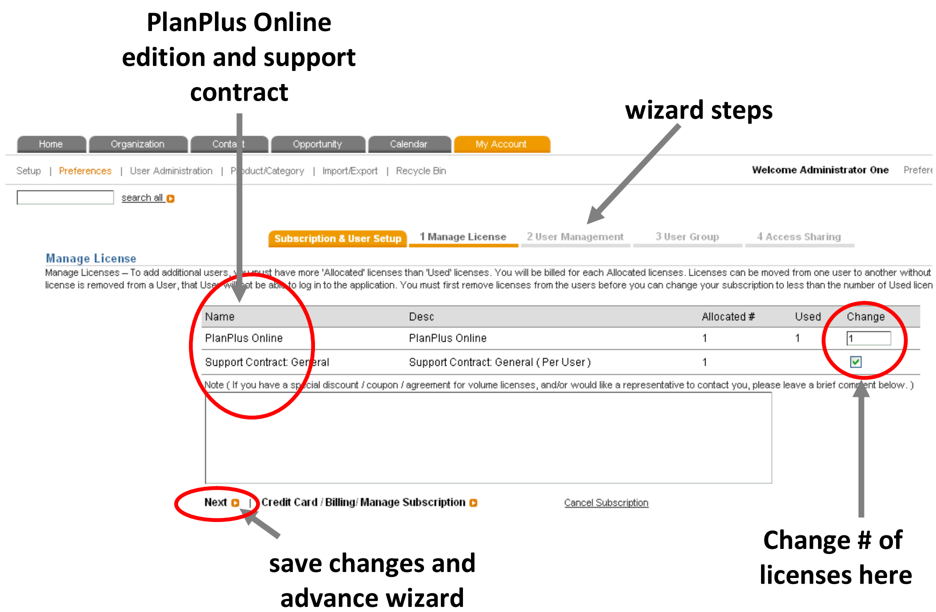
2. Click on the **Account Profile/Manage Account** heading.

PlanPlus Online displays the **Account Profile/Manage Account** section menu.



3. Click on the **Licenses & Users** link.

   PlanPlus Online opens the **Manage License** tab of the **Subscription & User Setup** wizard:



4. Enter the number of licenses you want to allocate to your company in the box in the **Change** column.

   ✪ If you allocate additional licenses, you will be billed for those the following month.

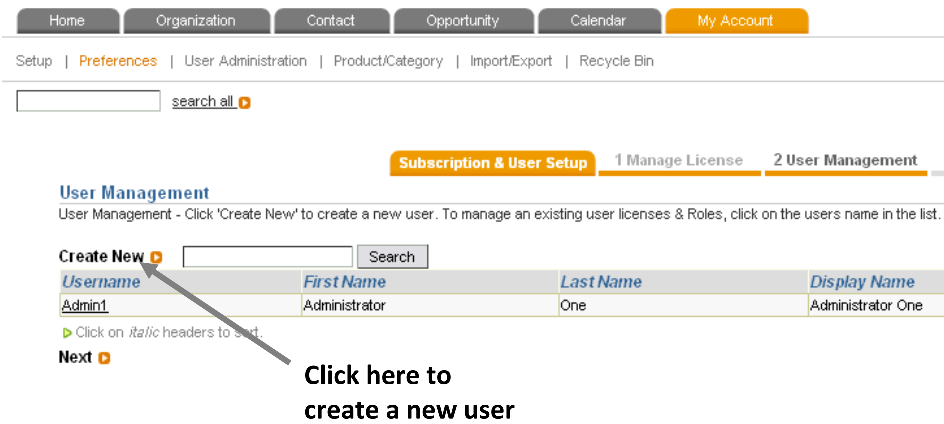
5. Click on **Next** at the bottom left-hand corner of the page.

   PlanPlus Online saves your changes to the **Manage License** tab and displays the **User Management** tab of the **Subscription & User Setup** wizard.

Creating a New User

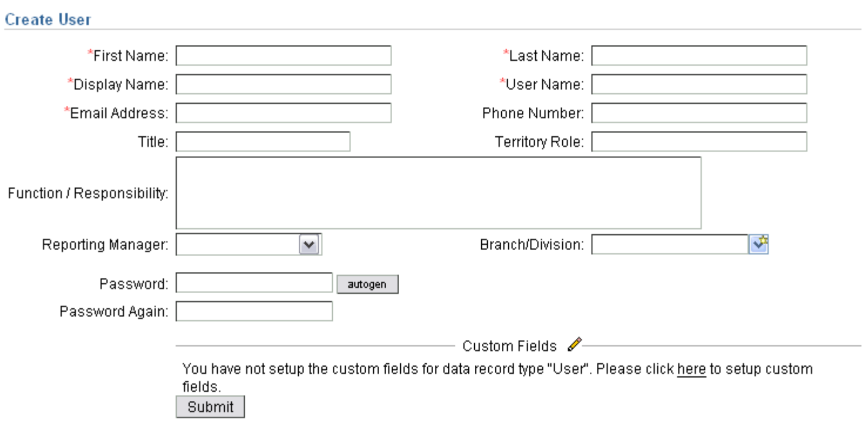
To create a new user, use the following steps:

1. From the **User Management** page of the **Subscription & User Setup** wizard, click on **Create New** on the left side of the page.



✪ To access the **User Management** tab of the **Subscription & User Setup** wizard, click on the **Account Profile/Manage Account** heading from the **My Account** tab, click on **Licenses & Users**, and click on the **User Management** tab.

PlanPlus Online displays the **Create User** page.



2. Enter the information for the new user.

✪ This is the location where you will specify the login information for the user, including **User Name** and **Password**.

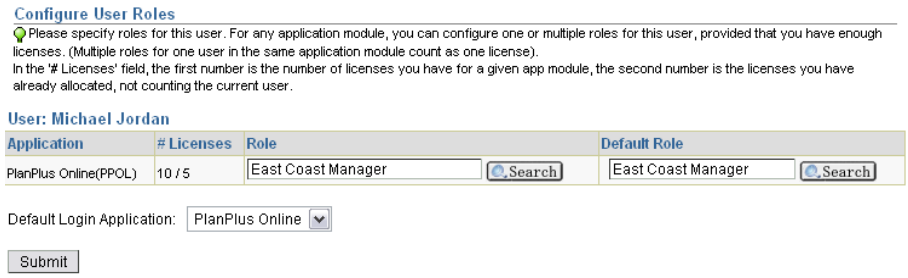
3. Type the login password for the new user in the **Password** field.

4. Re-type the login password in the **Password Again** field.

   ✪ If you want to have the system generate a password for the new user, click on the **autogen** button next to the **Password** field.

5. When you are finished entering the user information, click on the **Submit** button.

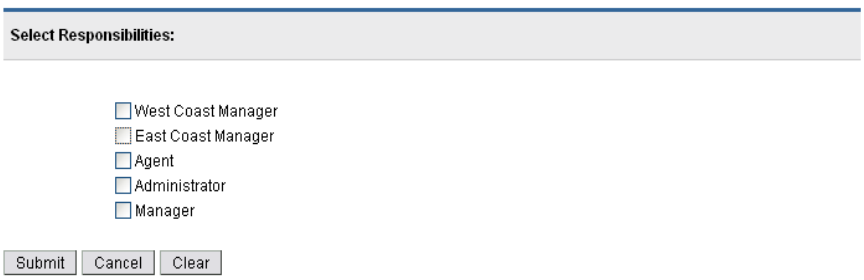
   PlanPlus Online saves the new user information and displays the **Configure User Roles** page.



   ✪ You will use the **Role** field to assign the new user a role. It is possible to assign more than one role to a user. The user will be able to toggle between the different roles through the **Preferences** link located in the Sub Menu. The toggle feature is usually used only by administrators. If you assign the user multiple roles, you can use the **Default Role** field to set the default role.

6. Click on the **Search** button for the **Role** field.

   PlanPlus Online displays **Select Responsibilities** page.



   ✪ The **Select Responsibilities** page lists all of the roles you have created within the system.

7. Select the check box for the role(s) you want to assign to the new user.

8. Click on the **Submit** button.

PlanPlus Online returns to the **Configure User Roles** page.

9. If you assigned more than one role, click on the **Search** button for the **Default Role** field**.**

   PlanPlus Online displays the **Select Default Role** page.

10. Click on the link for the default role you want to assign to the new user.

    PlanPlus Online assigns the default role you selected and returns to the **Configure User Roles** page.

11. If your organization has purchased more than one edition of PlanPlus Online, click on the **Default Login Application** drop-down menu and click on the default application for the user.

12. Click on the **Submit** button.

    PlanPlus Online creates the new user and returns to the **User Management** page.

Activity - Create four more users with the following information.

First Name	Last Name	Display Name	User Name	Email Address	Reporting Manager	Password	Role
Babe	Ruth	Babe Ruth	bruth	br@widgetsllc.com	Admin (You)	bruth	West Coast Manager
Serena	Williams	Serena Williams	swilliams	sw@widgetsllc.com	Babe Ruth	swilliams	Agent
Tiger	Woods	Tiger Woods	twoods	tw@widgetsllc.com	Michael Jordan	twoods	Agent
Lance	Armstrong	Lance Armstrong	larmstrong	la@widgetsllc.com	Admin (You)	larmstrong	Administrator

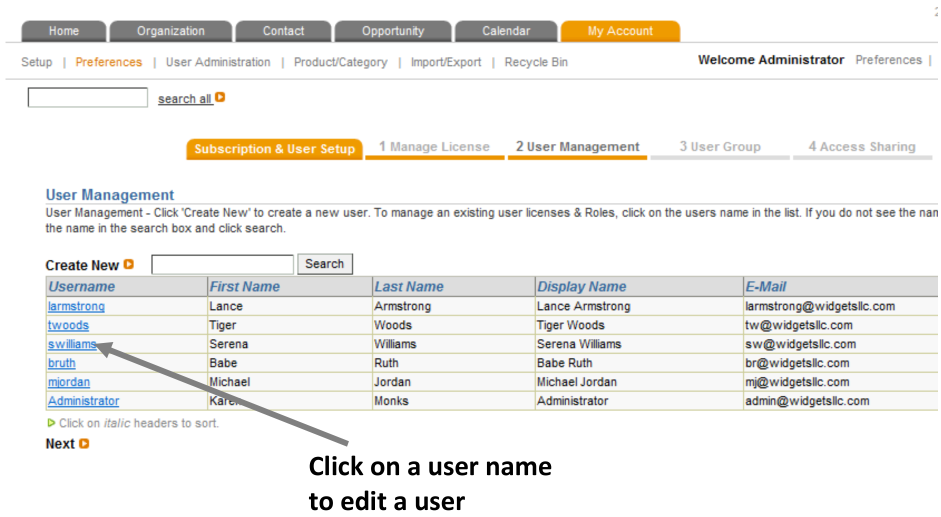
✪ Your **User Management** page should contain six users when you are finished.

Editing a User

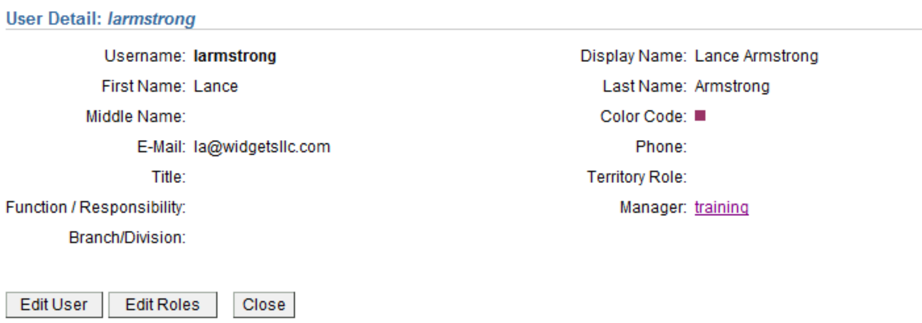
To edit a user, use the following steps:

1. From the **User Management** page of the **Subscription & User Setup** Wizard, click on the link for the user you want to edit.

   ✪ To access the **User Management** page, click on the **Account Profile/Manage Account** heading on the **My Account** tab, click on **Licenses & Users**, and click on the **User Management** tab.

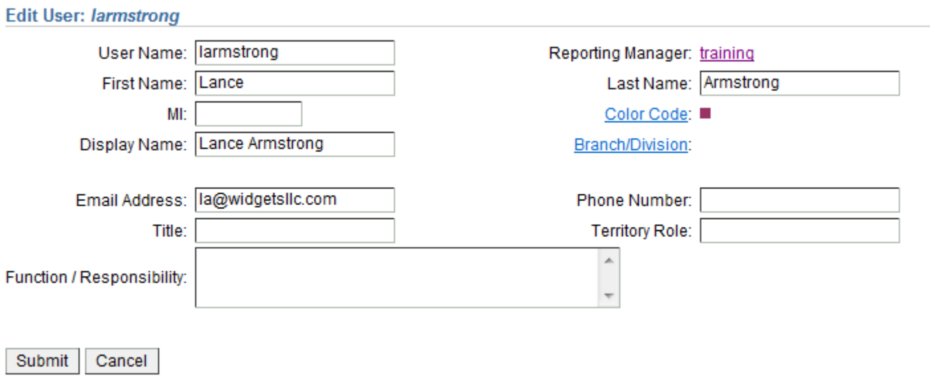


PlanPlus Online displays the **User Detail** page.



2. To edit the user's information, click on the **Edit User** button.

PlanPlus Online displays the **Edit User** page.



3. Make any necessary changes to the user’s information and click on the **Submit** button.

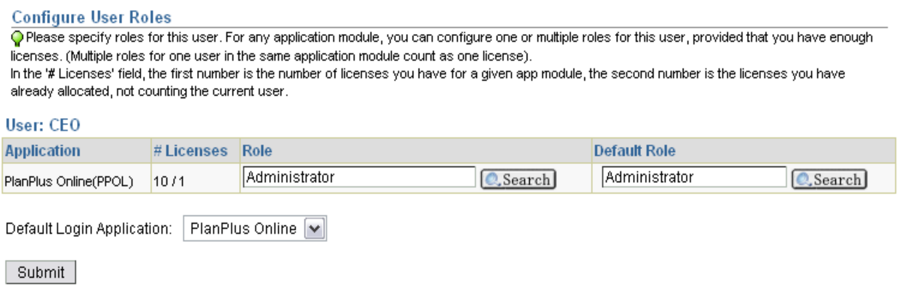
   PlanPlus Online saves the changes and displays the **User Management** page.

4. To edit a user’s roles, click on the link for the user you want to edit.

   PlanPlus Online displays the **User Detail** page.

5. Click on the **Edit Roles** button.

   PlanPlus Online displays the **Configure User Roles** page.



6. To change the role(s) for this user, click on the **Search** button for the **Role** field.

   PlanPlus Online displays the **Select Responsibilities** page.

7. Select or clear the check boxes as necessary to change the user’s role assignments and click on the **Submit** button.

   PlanPlus Online saves the changes and returns to the **Configure User Roles** page.

8. To edit the default role, click on the **Search** button for the **Default Role** field.

   PlanPlus Online displays the **Select Default Role** page.

9. Click on the link for the default role you want to assign to the user.

   PlanPlus Online assigns the default role you selected and returns to the **Configure User Roles** page.

   ✪ If your organization has purchased more than one edition of PlanPlus Online, click on the **Default Login Application** drop-down menu to select the default application for the user.

10. When you are finished editing the user's roles, click on the **Submit** button.

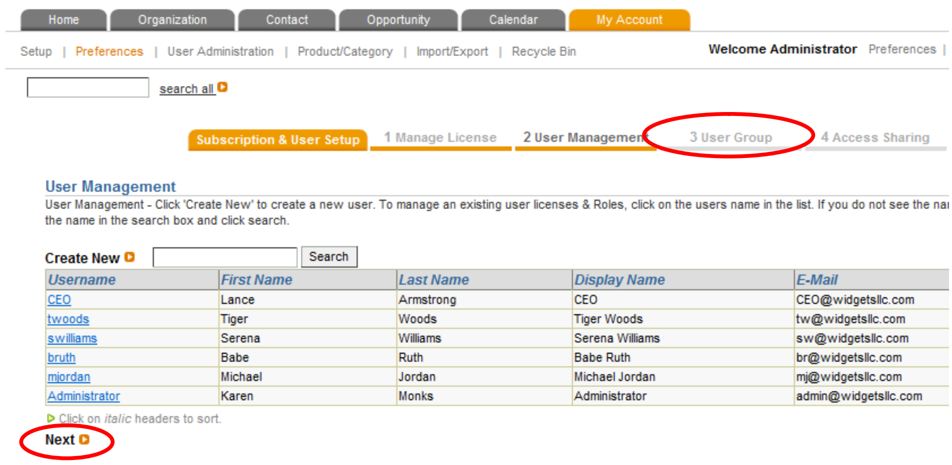
    PlanPlus Online returns to the **User Management** page.

Creating a User Group

User Groups are very helpful throughout PlanPlus Online. A group allows you to save multiple users to a single group name, which makes it easier to schedule meetings or send messages because you can select the single group name instead of having to select each person individually. For example, you might have a group that consists of your management team and another group for the entire company.

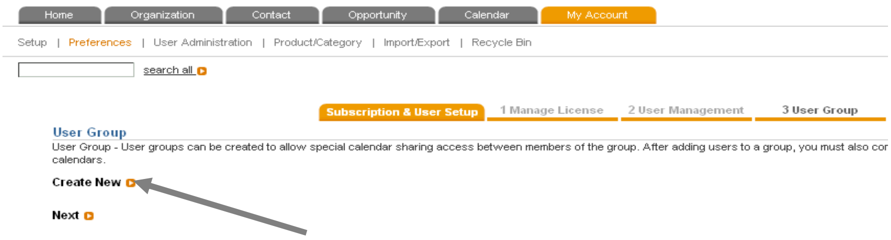
To create a user group, use the following steps:

1. From the **User Management** tab of the **Subscription & User Setup** wizard, click on **Next** or click on the **User Group** tab.



✪ You can also access the **User Group** page by clicking on the **Account Profile/Manage Account** heading on the **My Account** tab, clicking on **Licenses & Users**, and clicking on the **User Group** tab.

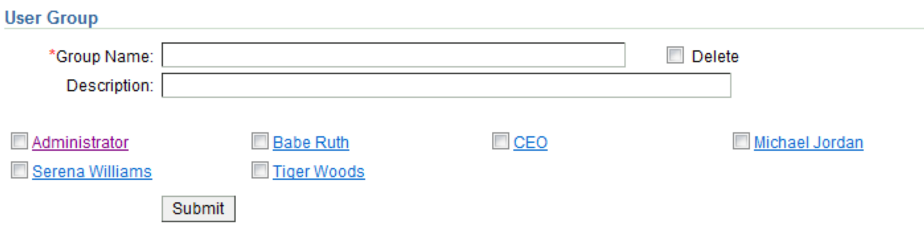
PlanPlus Online displays the **User Group** page.



Click here to create a new user group

2. Click on **Create New**.

   PlanPlus Online displays the **User Group** page.

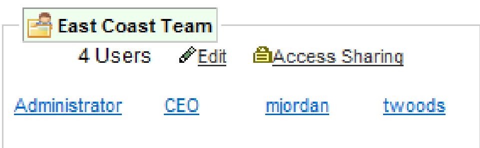


3. Enter a **Group Name** and a **Description** in the fields.

4. Select the check box for each user you want to add to the group.

5. Click on the **Submit** button.

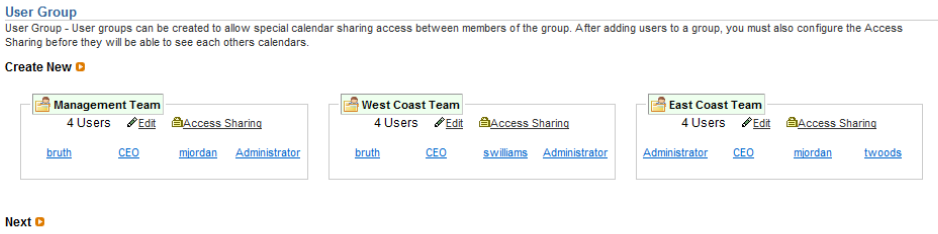
   PlanPlus Online creates the user group and returns to the **User Group** page where you will see the new user group with a list of all the users in the group.



Activity – Create 2 more user groups with the following information.

Group Name	Description	Members
West Coast Team	West Coast Team	Yourself (Administrator), CEO, Babe Ruth, and Serena Williams
Management Team	Management Team	Yourself (Administrator), CEO, Babe Ruth, and Michael Jordan

Your **User Group** page should look like the following when you are finished.



Lesson 3: Calendar Sharing

Calendar sharing is one of the most useful features available in PlanPlus Online. It allows you to overlay your calendar with the calendars of other users in your organization to make it easier to schedule meetings and appointments with multiple people. From a management perspective, it also allows you to see what your employees are working on and how busy they are.

Keep in mind the following:

- You can only share/overlay calendars with other PlanPlus Online users in your organization.
- To make calendar sharing quicker and easier, you can create and save different calendar views. This saves you from having to set up the overlay each time you want to view it. With the click of a button, PlanPlus Online shows you the calendars that are saved in the view.
- You can have access to other users' calendars without having to allow them access to yours.
- You can mark sensitive appointments as private. This allows you to prevent other users from seeing any of the appointment information. Viewers of your calendar will only see that you are busy at that time.

Setting up Access Sharing for a User Group

In order to give a user group the ability to overlay the calendars of people in their group, you must first set up access sharing by specifying whose calendar each user can view. Access sharing and calendar overlaying are two different things. Access sharing is the process of setting up the data sharing permissions and calendar overlaying is the actual sharing of calendars and appointment information.

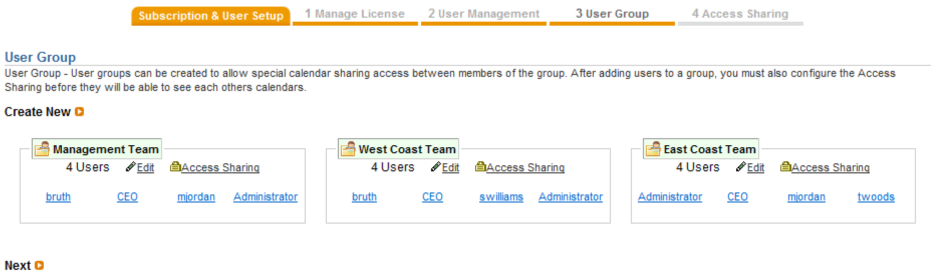
The Administrator can set up the access sharing for the entire company and may limit the ability of users to change their own settings. However, in most instances, the user will have the ability to configure his/her calendar sharing with all of the users they have access to.

To configure access sharing, use the following steps:

1. From the **Subscription & User Setup** wizard, click on the **User Group** tab.

    ✪ You can also access the **User Group** tab by clicking on the **Account Profile/Manage Account** heading on the **My Account** tab, clicking on **Licenses & Users**, and clicking on the **User Group** tab.

PlanPlus Online displays the **User Group** page.



✪ You cannot configure access sharing for user groups until you have created the users and user groups.

✂ A quick way to set up access sharing for your entire company is to set up a group containing everyone in your organization. You can then set access sharing privileges for all users on one page rather than working with one group at a time.

2. Click on the **Access Sharing** link inside the user group box that you want to configure.

   PlanPlus Online displays the **User Group** edit page, with the **Access Sharing** tab selected.

✪ All of the users in the group are listed down the left side of the page. To share a user's calendar with other people in the group, move to that user's row and select the check box for each person that you want to grant access to (moving from left to right). As you hold the mouse pointer over each check box, you will see a page tip explaining the access setting.

3. Select the check box for all of the users you want to be able to share calendars.

4. When you are finished, click on the **Submit** button.

   PlanPlus Online saves the access sharing settings and returns to the **User Group** page.

Activity – Configure Access Sharing for the West Coast Team and the Management Team

Group Name	Sharing
West Coast Team	Give full access to everyone on the team with the exception of Serena Williams. Do not give her access to the CEO's calendar.
Management Team	Allow all team members full access to the calendars of the other team members.

Overlaying Calendars

Overlaying calendars is the ability to view multiple calendars at once. For example, if I am the manager of the marketing department and I have 6 employees that work in my department, I can overlay or show all the appointments for my entire team on one calendar. This gives me the ability to see when there is available time for meetings, who is busy and who is not, and how active my department actually is.

✪ Before you can overlay calendars, you must first configure access sharing permissions. See the previous section for instructions on setting up access sharing.

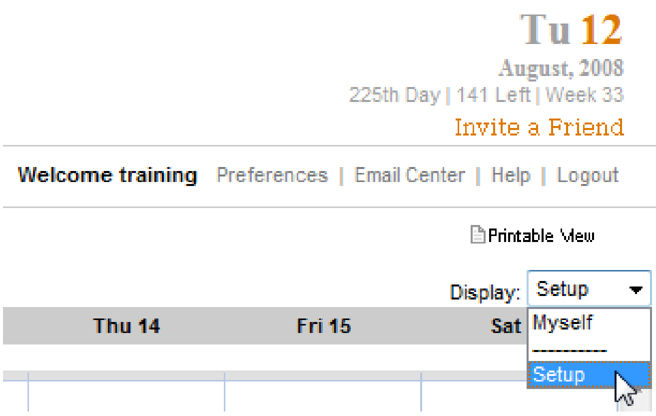
Creating a Calendar Overlay View

To create a view that overlays the calendars of multiple users, use the following steps:

1. From any page, click on the **Calendar** tab.

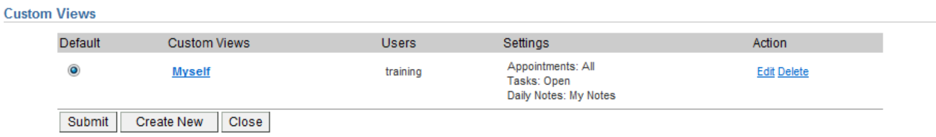
   PlanPlus Online displays the **Calendar** Home page.

2. Click on the **Display** drop-down menu (positioned just above the calendar), then click on **Setup**, as shown below.



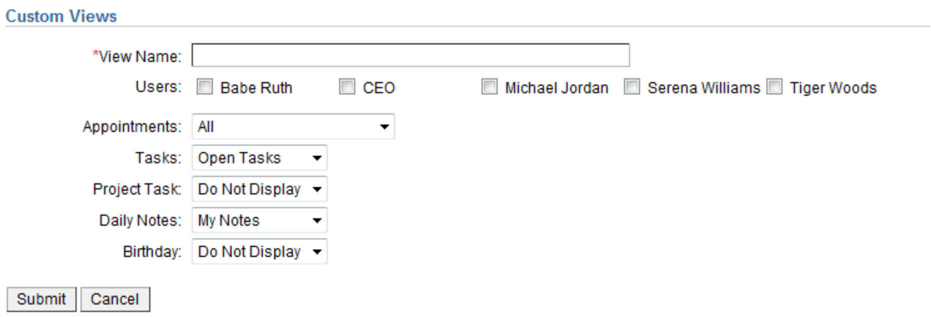
✪ The view labeled **Myself** is a default view that represents the user who is logged in.

PlanPlus Online displays the **Custom Views** page.



3. Click on **Create New**.

   PlanPlus Online displays the **Custom Views** page:



4. Enter a name for the view in the **View Name** field.

   ✪ For example, if you were creating a view to overlay the calendars for all employees in the marketing department, you would most likely name it **Marketing Department**.

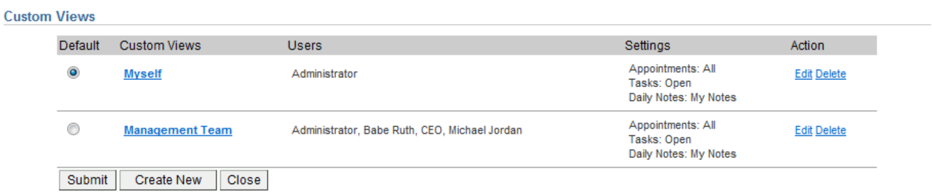
5. In the **Users** field, select the check box for each user whose calendar you want to include in the new view.

6. To control the items that display in the calendar, select an option from each of the following drop-down menus:

Drop-down menu	Description
Appointments	Select **All** to show all appointments or select **Open Appointments Only** to show only open appointments.
Tasks	Select **All Tasks** to show all tasks, select **Open Tasks** to show open tasks only, or select **Do Not Display** if you do not want to display any tasks.
Project Task	Select **All Tasks** to show all project tasks, select **Open Tasks** to show open project tasks only, or select **Do Not Display** if you do not want to display any project tasks. Project tasks are only visible for those who have purchased the project module.
Daily Notes	Select **All Notes** to show all notes, select **My Notes** to show only your notes, or select **Do Not Display** if you do not want to display any notes.
Birthday	Select **Display** to display birthdays on the calendar or select **Do Not Display** if you do not want to display birthdays on the calendar.

7. When you are finished, click on the **Submit** button.

   PlanPlus Online saves the new view and displays it on the **Custom Views** page:



8. Click on the **Close** button.

   PlanPlus Online displays the **Calendar** home page.

Displaying a Calendar Overlay View

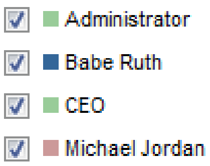
To display a calendar overlay view, use the following steps:

1. Refresh the **Calendar** home page by pressing the **F5** key or by clicking on the **Refresh** button located in your browser's toolbar area.

2. Click on the **Display** drop-down menu and click on the calendar overlay view you want to display.

   PlanPlus Online displays the view you selected, showing appointments for all of the users included in the view.

   ✪ PlanPlus Online displays each user's appointments and tasks with a different color border so you can easily differentiate them. In addition, it displays a color key showing you the color assigned to each person included in the calendar overlay.

   ✪ If you want to remove a user from the calendar overlay, clear the check box before his/her name.

Unit Performance Lab

Perfecting Your Skills

In this performance lab, you will review the material from the Users and Roles unit. Complete the exercises and wait for the instructor to check your work.

1. Create a new role named **Executive** and set the privileges to match those of the **Admin** role. Set the data access for the **Executive Role** to **Inherit**. Assign the **CEO** and the **Administrator** the **Executive Role**. Set the **Default Role** for the **CEO** to **Executive**.

2. Edit the Access Settings for the **PPOL Agent** role in the following manner:

   Ensure that the **Import Export** page cannot be accessed.

   Set the Default Views to **All Contacts**, **All Customers**, and **All Opportunities (Updateable).** Note: Enable the views prior to setting them as the **Default Views**.

   Set the data access to **Read Own/Write Own** for each of the applications.

3. Create a user group named **Entire Company** and include all of the users.

   Configure calendar sharing for the **Entire Company** group**.** Give everyone unlimited access with the exception of Serena Williams and Tiger Woods. Do not give them access to the CEO's calendar, their opposing manager's calendar, or each other's calendar.

   East Coast Team – Administrator, CEO, Michael Jordan, Tiger Woods

   West Coast Team – Administrator, CEO, Babe Ruth, Serena Williams

   Management Team -Administrator, CEO, Babe Ruth, Michael Jordan

4. Create a calendar view for the **Entire Company**, the **East Coast Team,** and the **West Coast Team** and include the necessary members.

5. Create a recurring appointment that lasts for 20 weeks. Schedule it for the **Entire Company.** Set it for Wednesdays at 9am and label it **Company Meeting – Mandatory**. Invite all employees.

   Create three more recurring appointments that run for 20 weeks using the information provided below.

Team	Day	Time	Name of Meeting
East Coast Team	Monday	10 AM	Stand Up Meeting
West Coast Team	Tuesday	3PM	Sales Meeting
Management Team	Thursday	Noon	Lunch and Learn

✪ When you are finished with the exercises, raise your hand and wait for the instructor to review your work.

Applying Your Knowledge

1. What three things must you do in order to give a new employee access to PlanPlus Online?
2. What is the difference between access sharing and data access?
3. What is the easiest way to configure access sharing for your entire company?
4. How many users are you allowed to create in PlanPlus Online?
5. How many default roles are there in PlanPlus Online and what are they?

Performance Lab Answers

Perfecting Your Skills

The Instructor will review the steps with everyone on the overhead projector.

Applying Your Knowledge

1. To give a new user access to PlanPlus Online, you would create additional licenses (if necessary), create a new user account, and attach a role.

2. Access sharing is the process of giving one user access to the calendars of other users so that he/she can overlay the other users' calendars. Data access determines a role's access to the data in each application.

3. The easiest way to configure access sharing for the entire company is to create a user group that contains every user in the company and then configure access sharing for that group (whole company).

4. You can create an unlimited number of users; however, they will not be able to log in to PlanPlus Online until you have purchased the necessary licenses and assigned each user a role.

5. There are three default roles – **Admin**, **Manager**, and **Agent**.

Unit 3: Custom Fields and Page Layouts

Unit Objectives:

- Create and manage custom fields.
- Customize default fields and drop-down menus.
- Configure page layouts.

Lesson 1: Custom Fields

PlanPlus Online is a very flexible application and is completely customizable to the needs of your business. Consider the data storage needs of your business compared to other businesses. Most businesses will want to store some similar information as well as information that is unique to that business. For example, consider the different data storage needs of a doctor and a high school basketball coach. The doctor would want to keep track of your height, weight, blood pressure, blood type, last physical exam date, surgery information, etc. The basketball coach might also want to track your height and weight, but he would also be interested in things such as your 40-yard dash time and vertical leap ability. PlanPlus Online gives you the ability to create custom fields to track the information that is important to you from anywhere in the world.

As the PlanPlus Online administrator, you can determine whether your users have access to the custom fields and page layout portions of the application. You can also customize page layouts for each individual user. As a result, not all of the users in your organization have to view the same fields.

Custom Field Types

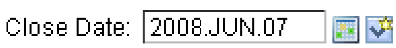
When you create a custom field, you must base the field on a field type. A field type determines the type of information that will be stored in the field and how the field appears to the user. For example, some fields store textual information and others numeric information. You may want the user to be able to type the information in the field or you might want them to select the information from a list of options. There are many custom field types to choose from in PlanPlus Online. The following is a list of each field type and a brief explanation of its function.

- **Character String –** creates a text field capable of storing up to 255 characters of information.

- **Character String / Option–** creates a text field that contains a drop-down menu of options from which users can choose the value for the field.

- **Color Code –** creates a drop-down menu of options where each choice is displayed in a different color.

- **Date –** creates a date field that stores dates in the yyyy/mmm/dd format.

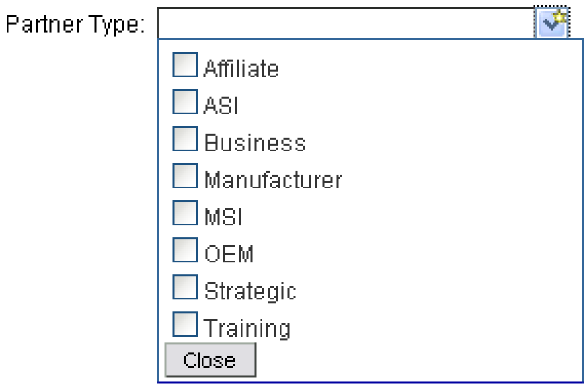


- **Entity- Contact, Organization, User:** creates a field that stores a link to a contact, organization, or user record.

- **File / Link –** creates a field that stores a link to a web page or a file (file size limit is 5MB).

- **Long Text –** creates a text field capable of storing unlimited characters of data.

- **Multiple String Values -** creates a text field that contains a drop-down menu of options from which users can choose multiple values for the field.



- **Number –** creates a numeric field.

- **Yes/No Checkbox –** creates a yes/no check box. If the box is checked, PlanPlus Online stores a 'yes' in the field. If the check box is unchecked, PlanPlus Online stores a 'no' in the field.

The following field types are covered in our System Administration Two course. For immediate assistance on these field types, call our support team.

- **Number/Calculated -** creates a number field that contains a value that is the result of a calculation based on the values in other number fields.
- **Time/Calculated –** creates a time field that contains a value that is the result of a calculation based on the values in other time fields.
- **String/Calculated –** creates a string (text) field that combines several other string fields together.

- **Value/Period -** Detail Applet for totaling Opportunity Values by Month, Quarter and Year.

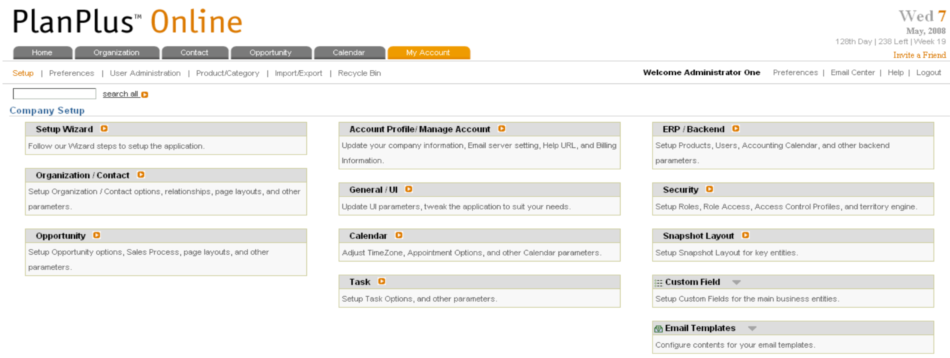
Creating Custom Fields

Before you can use a custom field to store data, you must define the field. You create custom fields for a specific application within PlanPlus Online, for example, **Contact, Organization** or **Opportunity**.

To create a custom field, use the following steps:

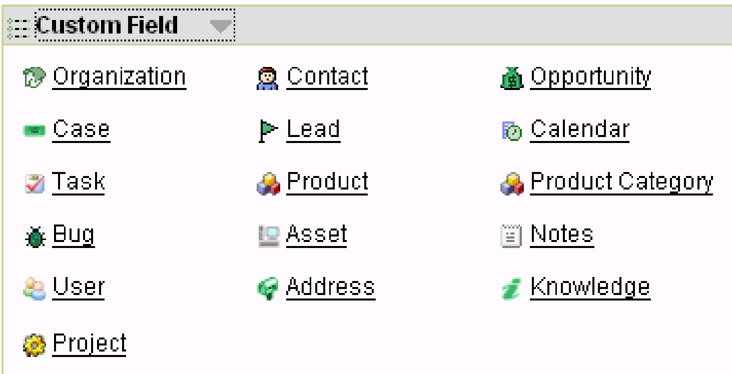
1. From the **Home** page, click on the **My Account** tab.

   PlanPlus Online displays the **My Account** page.



2. Click on the **Custom Field** heading.

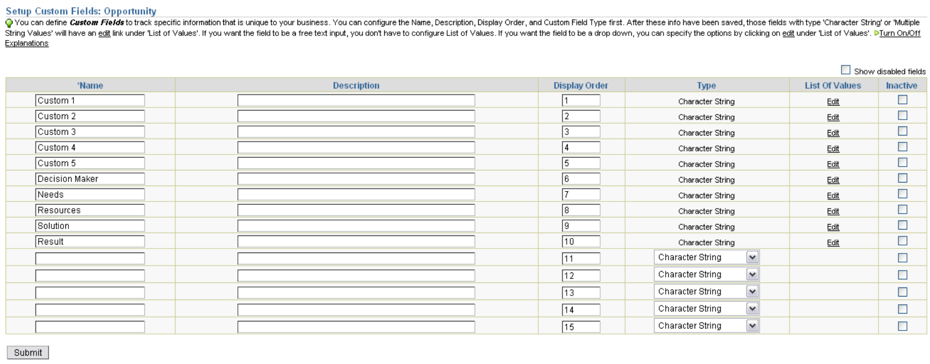
   PlanPlus Online displays the **Custom Field** section menu.



✪ You can create custom fields in any of the applications shown on the **Custom Field** section menu. However, some of the applications are only available in the Business Edition.

3. Click on the application for which you want to create a custom field.

PlanPlus Online displays the **Setup Custom Fields** page for the application you selected.



- ✪ The custom fields shown in the screenshot above are default custom fields. You can rename them here by deleting their name and typing a new name.

4. Type a name and description for the custom field in the first empty **Name** and **Description** fields.

5. If necessary, change the value in the **Display Order** field to move the new custom field up or down in the custom field list.

6. Click on the **Type** drop-down menu and select the field type you want to use for the new field.

7. Click on the **Submit** button.

   PlanPlus Online saves the custom field and refreshes the page.

- ✪ There are certain custom field types that will require further customization; for example, if you want to create a drop-down menu for a **Character String** field. If PlanPlus Online displays an **Edit** link in the **List of Values** column after the page refreshes, refer to the next section on **Editing Custom Fields**. If the field does not have an **Edit** link, the next step would be to add the field to a page, which is covered in the next lesson (**Configuring Page Layouts**).

🛠 *Activity - Create two more custom fields using the following information.*

Custom Field Application	Field Name	Type
Opportunity	Referred By	Entity – Contact
Opportunity	Products Interested In	Multiple String Values

Editing Custom Fields

Depending on the field type you selected for your custom field, you may need to provide additional information to complete the field definition. For example, if you created a **Multiple String Values** field, you must specify the list of options for the drop-down menu. The exact information you have to provide differs for each field type.

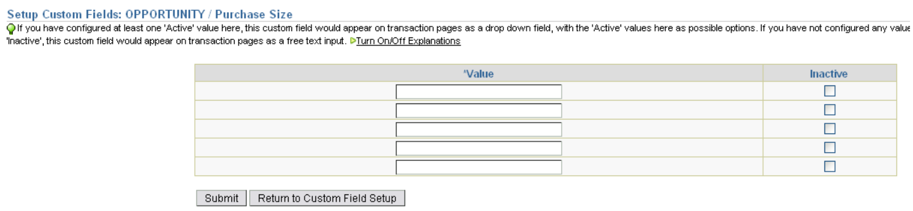
Character String

You can have a **Character String** field that allows free text input or you can specify a list of options for a drop-down menu. If you want to provide a drop-down menu in the field, you must specify the list of options.

To edit a **Character String** field, use the following steps:

1. Click on the **Edit** link for the custom field.

   PlanPlus Online displays the **Setup Custom Fields** page for the custom field.



2. Enter the options for the drop-down menu in the **Value** fields.

3. Click on the **Submit** button.

   PlanPlus Online refreshes the **Setup Custom Fields** page.

   ✪ Upon clicking on the **Submit** button, PlanPlus Online automatically alphabetizes and sorts the **Value** fields. To list the entries in something other than alphabetical order, place a number in front of each entry. PlanPlus Online will sort the entries in numerical order.

- ✪ If you want to define more options for the drop-down menu than there are **Value** fields, fill in all of the available fields and click on the **Submit** button. When PlanPlus Online refreshes the page, it will add five more fields to the page.

4. Click on the **Return to Custom Field Setup** button when you are finished defining values for the field.

   PlanPlus Online displays the **Setup Custom Fields** page.

   - ✪ At this point, you have only created the **Character String** custom field and defined the values for the drop-down menu. The next step is to configure the page layouts to include the new field. Page layouts will be covered in Lesson 3 of this Unit.

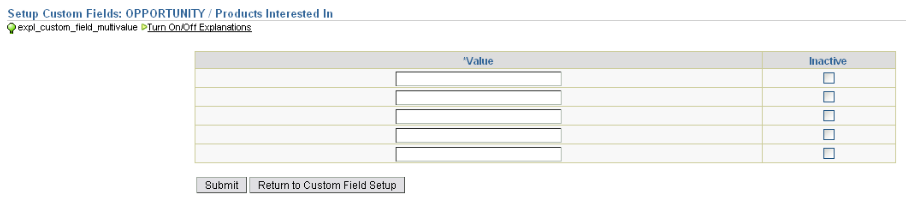
Multiple String Values

In a **Multiple String Values** field, you are able to select more than one option from the drop-down menu. You must edit the field to specify the values for the drop-down menu.

To edit a **Multiple String Values** field, use the following steps:

1. Click on the **Edit** link for the **Multiple String Values** field.

   PlanPlus Online displays the **Setup Custom Fields** page.



2. Enter the options for the drop-down menu in the **Value** fields.

3. When you are finished, click on the **Submit** button.

   PlanPlus Online refreshes the **Setup Custom Fields** page.

   - ✪ Upon clicking the **Submit** button, PlanPlus Online automatically alphabetizes and sorts the **Value** fields.

   - ✪ If you want to define more options for the drop-down menu than there are **Value** fields, fill in all of the available fields and click on the **Submit** button. When PlanPlus Online refreshes the page, it will add five more fields to the page.

4. Click on the **Return to Custom Field Setup** button.

   PlanPlus Online displays the **Setup Custom Fields** page.

✪ At this point, you have only created the **Multiple String Values** field and defined the values for the drop-down menu. The next step is to configure the page layouts to include the new field. Page layouts are covered in Lesson 3 of this unit.

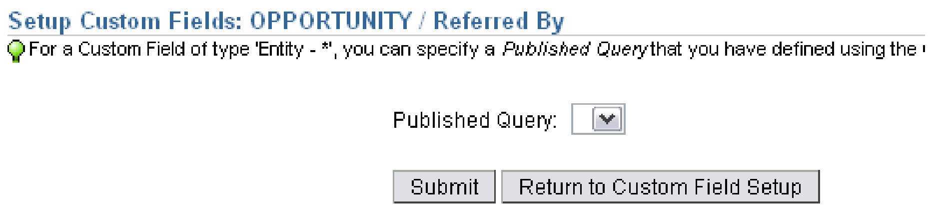
Entity - Contact, Organization & User

An **Entity** field allows you to select field values from your lists of contacts, organizations, or users. For example, if you wanted to include the name of the person who referred you to a new customer, you could use an **Entity – Contact** field to store the name of the referring contact in the contact record for a new client. PlanPlus Online displays an icon for the **Entity** field, which you can click on to select the contact, organization, or user.

To edit an **Entity – Contact, Organization**, or **User** field, use the following steps:

1. Click on the **Edit** link for the **Entity** field.

   PlanPlus Online displays the **Setup Custom Fields** page.



✪ In the PlanPlus Online Sales and PlanPlus Online Basic editions, you cannot create queries and therefore cannot make customizations to entity fields. If you are a Business edition user, you can choose a query from the drop-down menu.

2. Click on the **Return to Custom Field Setup** button.

   PlanPlus Online displays the **Setup Custom Fields** page.

✪ When you add an **Entity** field to an application page, you will be able to choose from a drop-down menu containing all of your contacts, users or organizations (depending on the type of **Entity** field you created).

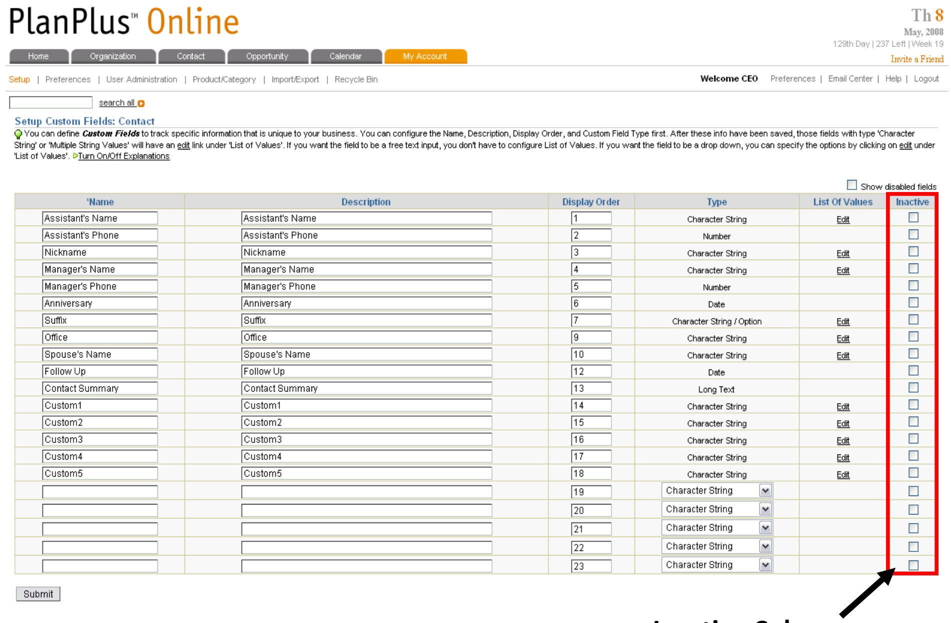
✪ At this point, you have only created the **Entity** custom field. The next step is to configure the page layouts to include the new field. Page layouts are covered in Lesson 3 of this unit.

Deleting a Custom Field

If you no longer want to use a custom field, you can make the field inactive and it will no longer show up on any page layouts.

To delete a custom field, use the following steps:

1. From the **Setup Custom Fields** page for the application containing the custom field, select the **Inactive** check box for the custom field you want to delete.



Inactive Column

✪ To access the **Setup Custom Fields** page, click on the **Custom Field** heading on the **My Account** tab and click on the link for the application containing the custom field you want to delete.

2. Click on the **Submit** button.

   PlanPlus Online refreshes the page and no longer displays the custom field you deleted.

✪ If you want to redisplay custom fields that you have made inactive, select the **Show disabled fields** check box located directly above the inactive column and clear the **Inactive** check box. Click on the **Submit** button.

Lesson 2: Default Fields and Drop-Down Menus

In addition to custom fields, which you can create, edit, and delete as necessary, PlanPlus Online also has default fields, which are included in the application by default. There are also default drop-down menus that you can edit. The **Phone**, **Email**, and **Address** fields for a contact are examples of default fields. You can customize the field labels, which are the names PlanPlus Online uses to identify the fields on the application pages, for default fields to better suit the needs of your business. For example, you could change the **Label** for the default field **URL** to **Web Site** or **Email** to **Email Address**. You can also change the options on the default drop-down menus as necessary.

✪ The most commonly edited default field is the drop-down menu for the **Classification** field in the **Contact** application. This field will almost undoubtedly change for each organization.

Editing Default Fields

Although you cannot delete default fields entirely, you can remove them from application pages and change the field label. To edit default fields, you must access the page layout options for the application. Page layouts determine which fields display on a page.

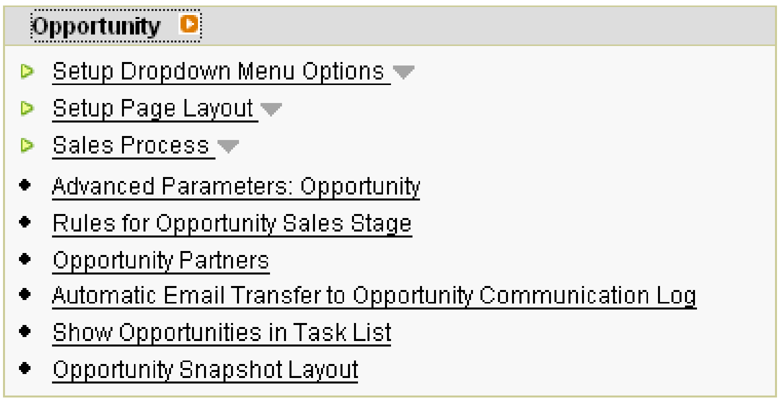
To edit default fields, use the following steps:

1. Click on the **My Account** tab.

   PlanPlus Online displays the **My Account** page.

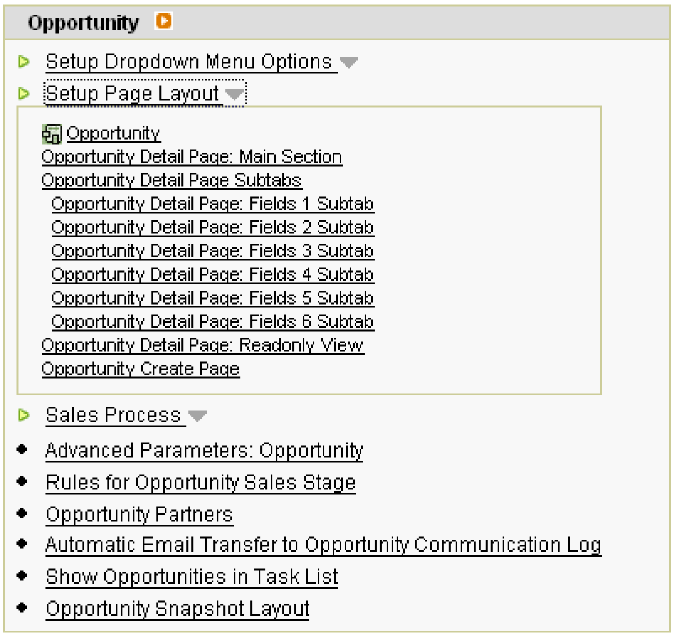
2. Click on the **Organization/Contact** or **Opportunity** heading depending on the application you want to edit.

   PlanPlus Online displays the section menu for the application you selected. The following is the section menu for the **Opportunity** application.



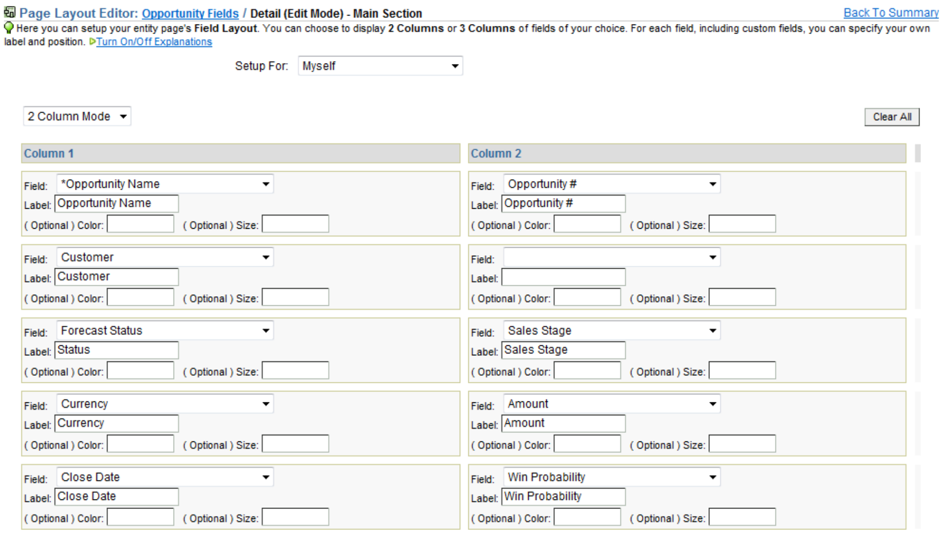
3. Click on the **Setup Page Layout** link.

PlanPlus Online displays the page layout options for the application you selected. The following displays the options for the **Opportunity** application.



4. Depending on the application you want to edit, click on one of the following links: **Organization Detail Page: Main Section**, **Contact Detail Page: Main Section**, or **Opportunity Detail Page: Main Section**.

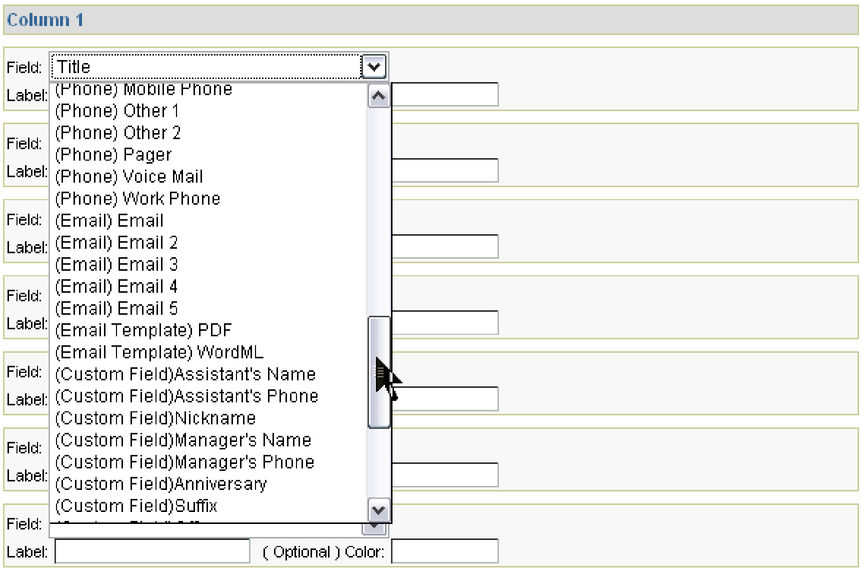
   PlanPlus Online displays the **Page Layout Editor** page for the application you selected. The following screen is for the **Opportunity Detail** page.



- ✪ The **Page Layout Editor** page contains field definitions for each field on the page you are editing. The field definition includes the field name, the field label, the field color, and the field size.

5. Click on the **Field** drop-down menu for one of the fields.

   PlanPlus Online displays the list of default and custom fields for this page.



- ✪ Notice that some of the fields in the drop-down menu are preceded by the words **(Custom Field)**. These represent the custom fields that you have created. The entries that are not preceded by **(Custom Field)** are default fields. Some default fields may also be preceded by **(Phone)** or **(Email)**.

6. If you want to change the label that PlanPlus Online displays in front of the field, select the text in the **Label** field and type the new text.

- ✪ You cannot change the name of the default field, but you can change its label, which is what the user sees on the page.

7. When you are finished modifying field labels, click on the **Submit** button.

- ✪ We will cover adding and removing fields from a page in the page layout section.

8. PlanPlus Online saves the changes and displays the **Home** page for the application you were editing.

- ✪ PlanPlus Online automatically redirects you to the **Home** page for the selected application to allow you to review the changes you made to the page.

Editing Default Drop-Down Menus

PlanPlus Online often provides you with drop-down menus to make creating new contacts, organizations, and opportunities easier and more consistent; for example, the **Business Line** drop-down menu (located on the **Create Organization** page). Instead of typing an entry in a drop-down field, you select from a list of pre-defined options.

You can edit the items that PlanPlus Online displays on the default drop-down menus to better suit your business. You may want to delete options, add new options, or rename options.

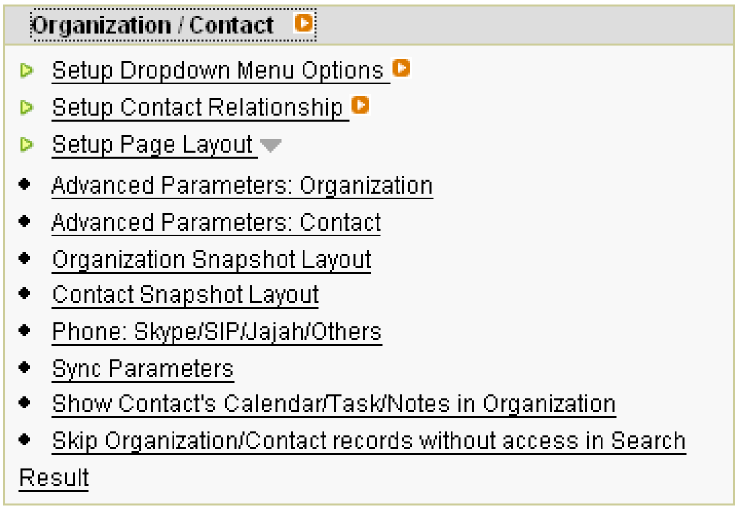
To edit the default drop-down menus, use the following steps:

1. Click on the **My Account** tab.

   PlanPlus Online displays the **My Account** page.

2. Click on the **Organization/Contact** or **Opportunity** heading depending on the application you want to edit.

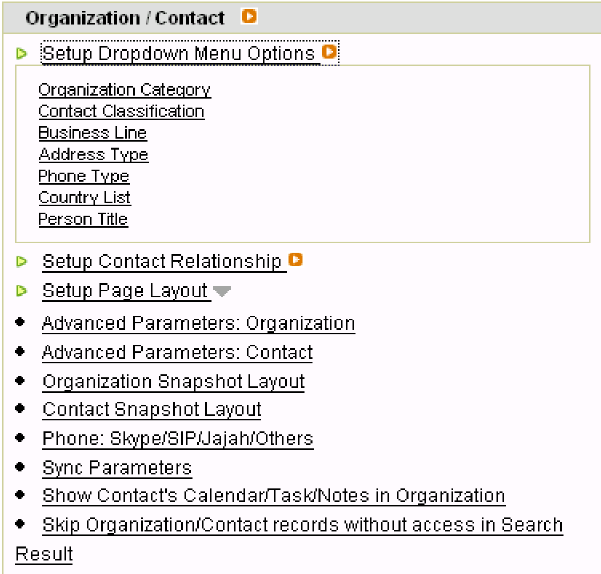
   PlanPlus Online displays the section menu for the application you selected. The following is the section menu for the **Organization/Contact** applications.

3. Click on the **Setup Dropdown Menu Options** link or the **Setup Contact Relationship** link.

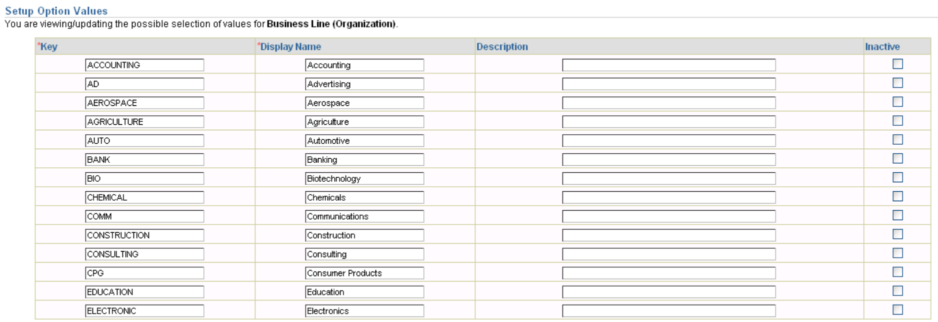
   ✪ You would use the **Setup Contact Relationship** option to edit the drop-down menu options that pertain to linking contacts, organizations, and opportunities with each other. It is only available on the **Organization/Contact** section menu.

PlanPlus Online displays links for the drop-down menus in the current application.



4. Click on the link for the drop-down menu you want to change**.**

PlanPlus Online displays the **Setup Option Values** page for the selected drop-down menu.



Setup Option Values

You are viewing/updating the possible selection of values for **Business Line (Organization)**.

*Key	*Display Name	Description	Inactive
ACCOUNTING	Accounting		☐
AD	Advertising		☐
AEROSPACE	Aerospace		☐
AGRICULTURE	Agriculture		☐
AUTO	Automotive		☐
BANK	Banking		☐
BIO	Biotechnology		☐
CHEMICAL	Chemicals		☐
COMM	Communications		☐
CONSTRUCTION	Construction		☐
CONSULTING	Consulting		☐
CPG	Consumer Products		☐
EDUCATION	Education		☐
ELECTRONIC	Electronics		☐

5. Edit or add to the drop-down menu options as necessary.

   ✪ You can add up to five new options at a time.

6. When you are finished, click on the **Submit** button.

   PlanPlus Online saves your changes and redisplays the **Setup Option Values** page.

   ✪ PlanPlus Online always displays five empty fields for additional menu options. If you want to add more than five new options, enter the first five and click on the **Submit** button. PlanPlus Online adds five more blank fields. You can add as many options to the drop-down menu as necessary.

Lesson 3: Page Layouts

In this lesson, you will learn how to:

- Add and remove custom and default fields from application pages.
- Add colors to custom and default fields.
- Configure columns in Page Layouts.
- Create field groups and add them to application pages.
- Customize and create sub tabs.

You have already learned how to create new custom fields and customize the default fields within PlanPlus Online to suit the needs of your business. Now you are ready to learn how to add fields to application pages. In this lesson, you will learn how to customize the pages within PlanPlus Online by adding or removing fields and by changing the look and feel of the pages.

Adding or Removing Fields from Application Pages

To add or remove fields from application pages, use the following steps:

1. Click on the **My Account** tab.

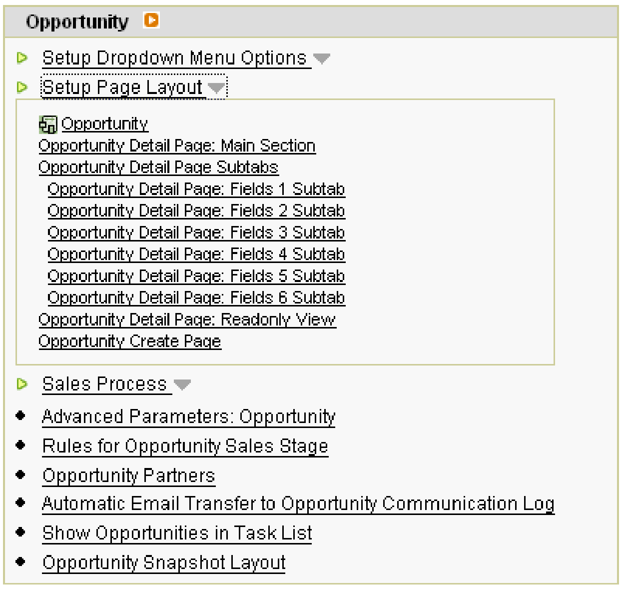
   PlanPlus Online displays the **My Account** page.

2. Click on the **Organization/Contact** or **Opportunity** heading depending on the application you want to edit.

   PlanPlus Online displays the section menu for the application you selected.

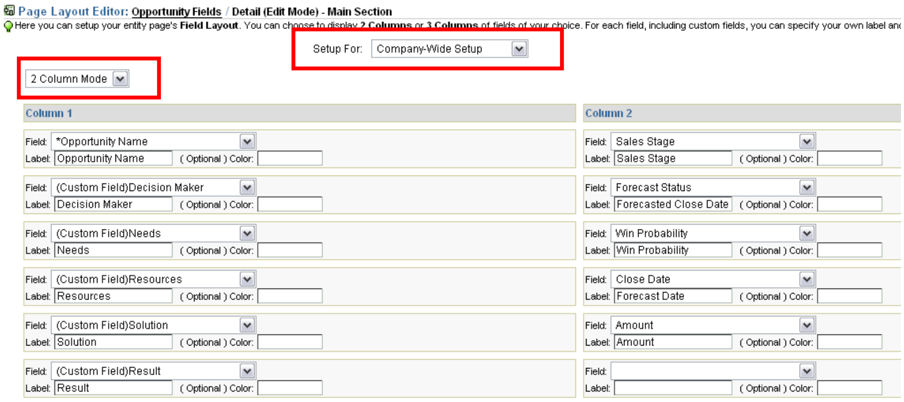
3. Click on the **Setup Page Layout** link.

   PlanPlus Online displays the page layout options for the application you selected.



4. Click on the **Main Section** link for the application that you want to edit.

   PlanPlus Online displays the **Page Layout Editor** page.



✪ The changes you make in the **Page Layout Editor** can apply to your version of PlanPlus Online or to the setup for your entire company. The **Company-Wide Setup** option is recommended. If you want to change the page layout for yourself only or for a specific role, select the option from the drop-down menu.

5. Click on the **Setup For** drop-down menu and select the appropriate option.

✪ If you want to make **Company-Wide Setup** the default, select the **Disallow user level customization** check box at the bottom of the page. The **Disallow user level customization** check box allows you to restrict users from changing the page layout of the current page. It is recommended that only Administrators change page layouts.

6. To control the number of columns on the page, click on the **2 Column Mode** drop-down menu and select the number of columns for the page.

✪ The column mode setting controls the number of columns that PlanPlus Online displays on the page. The **2 Column Mode** setting allows the user to view the entire page without having to use a horizontal scroll bar.

7. To add a custom or default field to the page, move to an empty **Field** box and click on the drop-down menu.

   PlanPlus Online displays the available fields for the page.

8. Click on the custom or default field you want to add to the page.

✪ Custom fields are preceded by the text **(Custom Field)**.

✪ PlanPlus Online automatically enters the **Label** for the custom field as **(Custom Field) <field name>**. You may want to edit the label to remove the **(Custom Field)** text.

9. Edit the label for the field in the **Label** box.

10. If you want PlanPlus Online to display the field name in a particular color, type the color name in the **(Optional) Color** field, for example, red, blue, or yellow. PlanPlus Online will use that color to display the field name.

    ✪ You can also use Hex Codes to specify a color choice. For more information on Hex Codes, go to Google and search for the term **"Hex Codes".**

11. To remove a field from the page, click on the field's drop-down menu, scroll to the top of the field list, and click on the blank field.

    PlanPlus Online removes the field from the page.

12. When you are finished, click on the **Submit** button.

    PlanPlus Online saves your changes and displays the **Home** page for the selected application.

    ✪ PlanPlus Online automatically redirects you to the **Home** page for the selected application to allow you to review the changes you made to the page layout.

    ✂ Another way to review your changes is to open a second page in your browser by right-clicking on the page and selecting **Open Link in New Window** or **Open Link in New Tab** (If your browser will allow this). By refreshing the second page after you click on the **Submit** button, you will instantly be able to review the changes.

Creating Field Groups

Field groups allow you to separate certain fields from the rest of the fields on a page by adding a border and a different background color to the fields. These field groups help to break up pages with extensive content. You must first create the field groups and then add them to application pages. You can create field groups with both custom fields and default fields.

To create field groups, use the following steps:

1. Click on the **My Account** tab.

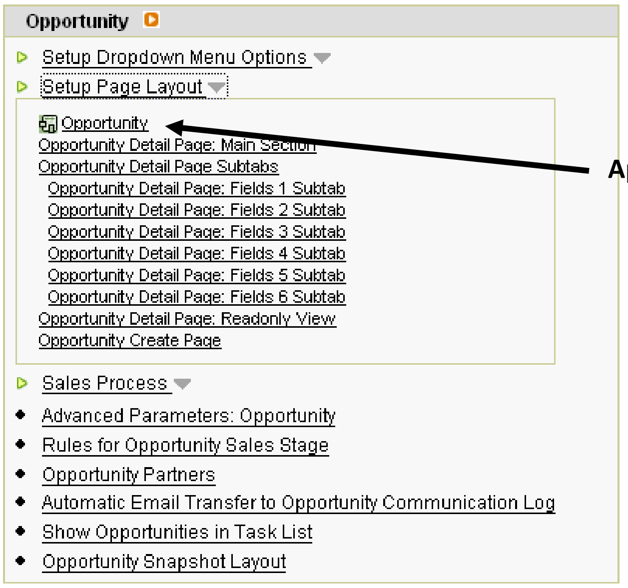
   PlanPlus Online displays the **My Account** page.

2. Click on the **Organization/Contact** or **Opportunity** heading depending on the application you want to edit.

   PlanPlus Online displays the section menu for the application you selected.

3. Click on the **Setup Page Layout** link.

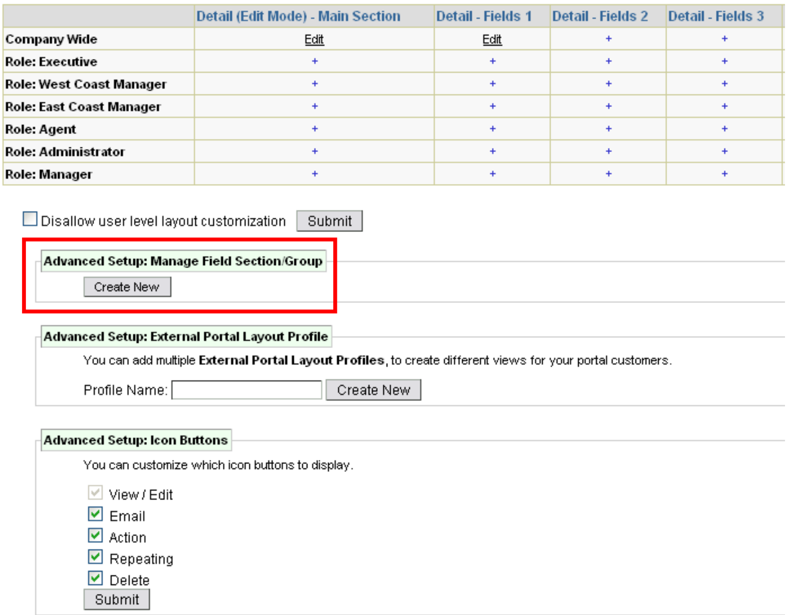
PlanPlus Online displays the page layout options for the selected application.



Application Header

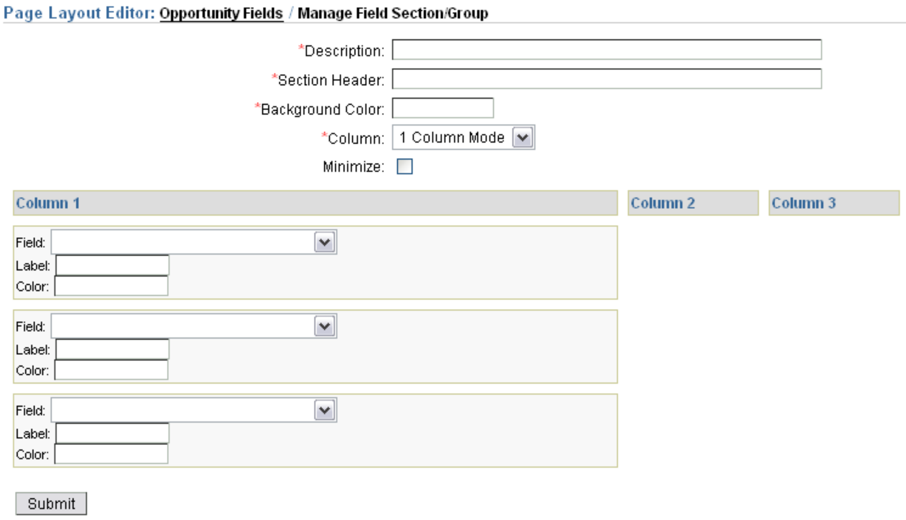
4. Click on the **Header** link for the application where you would like to create a field group.

   PlanPlus Online displays the **Page Layout Editor** page for the selected application.



5. Click on the **Create New** button inside the **Advanced Setup: Manage Field Section/Group** box.

PlanPlus Online displays the **Manage Field Section/Group** page for the selected application.



6. Enter a description for the field group in the **Description** field.

    ✪ The **Description** is the name of the Group. It will not be displayed on the page.

7. Enter the section header in the **Section Header** field.

    ✪ The section header is the name that PlanPlus Online displays with the group on the page in the application and should describe or summarize the fields within the group. For example, if you are creating a group of contact information containing phone, email, and address fields, you might name the group **Contact Info.**

8. Enter a Hex code or color name in the **Background Color** field.

9. Select the number of columns you want to use to display the fields in the group from the **Column** drop-down menu.

10. The **Minimize** check box gives you the option of minimizing the field group initially. When the user selects it, PlanPlus Online expands it.

11. Click on the first **Field** drop-down menu and select a field to add to the field group.

12. Type a label in the **Label** field.

    ✪ Enter a Hex code or color name in the **Color** field if you want to display the field text in a particular color.

13. Continue adding fields to the group as necessary.

- ✪ If you want more than three fields in the field group, click on the **Submit** button to save it and then reopen it to add more fields. PlanPlus Online will display three additional boxes.

14. When you are finishing adding fields, click on the **Submit** button.

    PlanPlus Online displays the **Page Layout Editor** page and displays the new field group in the **Advanced Setup** box.

Adding Field Groups to Application Pages

Now that you have created the field group, you can add it to a page within the application in which you created it.

To add a field group to an application page, use the following steps:

1. Click on the **My Account** tab.

   PlanPlus Online displays the **My Account** page.

2. Click on the **Organization/Contact** or **Opportunity** heading depending on the application you want to edit.

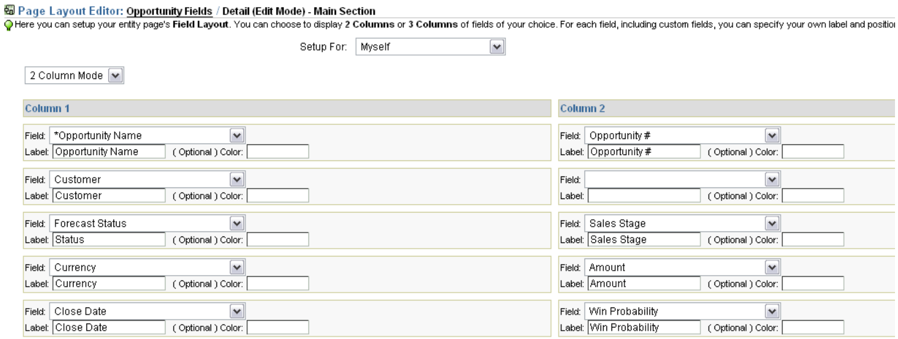
   PlanPlus Online displays the section menu for the application you selected.

3. Click on the **Setup Page Layout** link.

   PlanPlus Online displays the page layout options for the selected application.

4. Click on the page that you want to edit.

PlanPlus Online displays the **Page Layout Editor** page for the page you selected.



5. Click on the drop-down menu for an empty field and click on the group you want to add to the page.

   ✪ In the drop-down menu, PlanPlus Online precedes each field group with the **(Field Group)** label and displays them at the bottom of the menu.

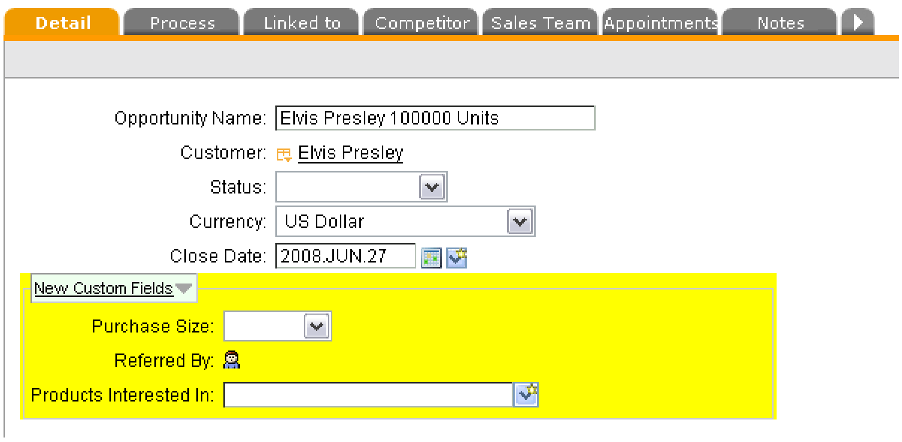
6. When you are finished, click on the **Submit** button.

   PlanPlus Online displays the **Home** page for the application.

   ✪ PlanPlus Online automatically redirects you to the **Home** page for the selected application to allow you to review the changes you made to the page layout.

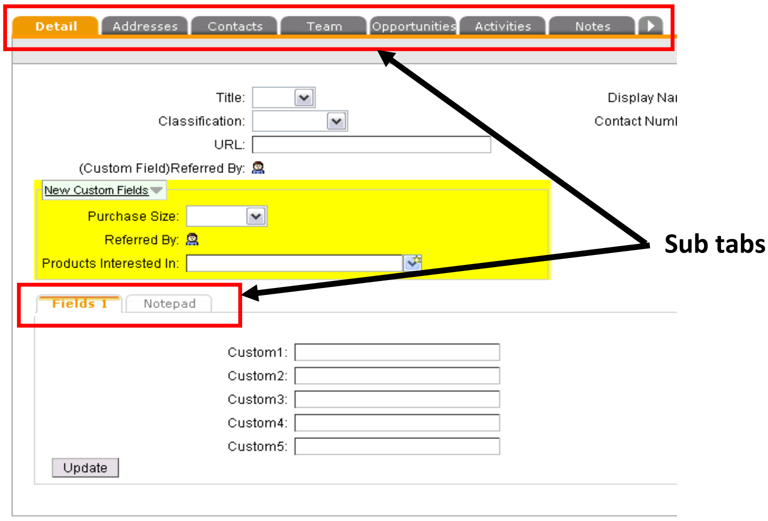
   ✪ Another way to review your changes is to open a second page in your browser by right-clicking on the page and selecting **Open Link in New Window** or **Open Link in New Tab**. By refreshing the second page after you click on the **Submit** button, you will instantly be able to review the changes.

The following displays a field group on the **Opportunity Detail** page.



Configuring Application Sub Tabs

On the **Detail** page of each application, PlanPlus Online displays sub tabs labeled with default names. You can configure these sub tabs and their contents so they are appropriate for your business.



To configure sub tabs, use the following steps:

1. Click on the **My Account** tab.

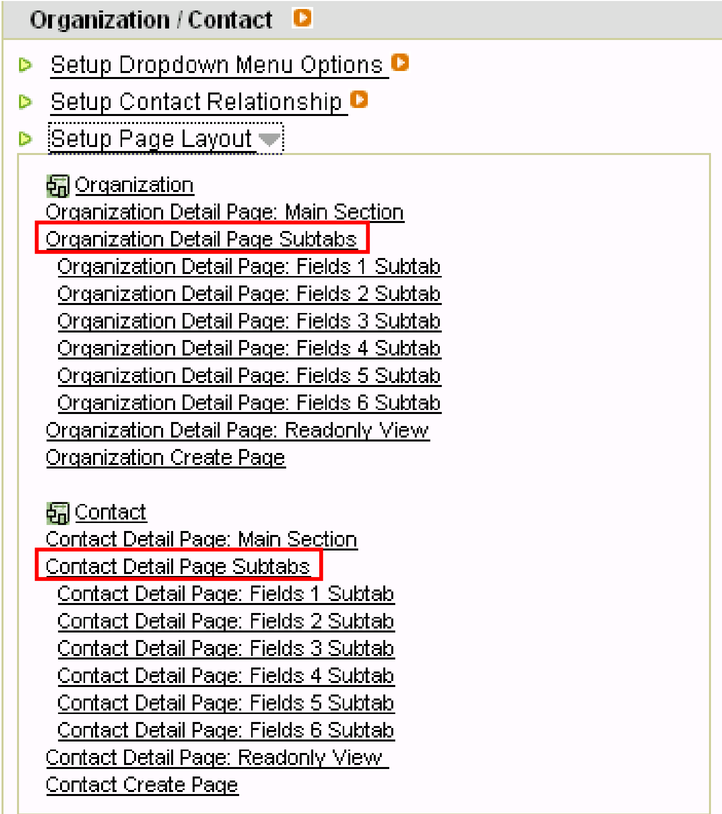
   PlanPlus Online displays the **My Account** page.

2. Click on the **Organization/Contact** or **Opportunity** heading depending on the application you want to edit.

   PlanPlus Online displays the section menu for the application you selected.

3. Click on the **Setup Page Layout** link.

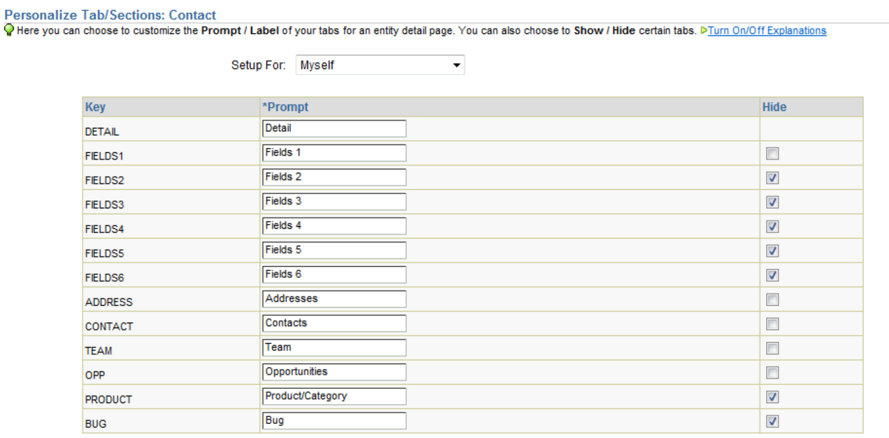
PlanPlus Online displays the page layout options for the application you selected.



- To activate/deactivate a sub tab or edit its title, click on the **Contact Detail Page Subtabs** link.
- To edit the content of a sub tab page, click on the sub tab page (i.e. **Contact Detail Page: Fields 1 Subtab**) and choose the fields you want to display on the sub tab.

4. Click on the **<Application Name> Detail Page Subtabs** link.

   PlanPlus Online displays the **Personalize Tab/Sections** page for the application.



✪ Each one of the entries represents the title of a sub tab on the **Detail** page of the selected application. The **Prompt** field contains the label that PlanPlus Online displays on the sub tab. Some of the sub tabs run across the top of the **Detail** page, while others are in the bottom section of the page.

✪ The changes you make in the **Personalize Tab/Sections** page can apply to your version of PlanPlus Online or to the setup for your entire company.

5. Click on the **Setup For** drop-down menu and select either **Myself** or **Company-Wide Setup**.

6. Rename the sub tabs as necessary by changing the label in the **Prompt** field.

✪ To hide a sub tab, make sure its **Hide** check box is selected. To show a previously hidden sub tab, clear its **Hide** check box.

7. When you are finished, click on the **Submit** button**.**

PlanPlus Online saves the information and refreshes the page.

✪ You can check your work by visiting the **Detail** page in the application.

✪ To configure page layouts for any sub tabs that you choose to unhide, click on the link for the sub tab page from the **Setup Page Layout** options menu and edit the information as necessary.

✂ You can also quickly show and hide sub tabs by clicking on the arrow located at the right end of the main sub tabs located on the **Detail** page for any application and selecting **Configure**. PlanPlus Online displays the **Personalize Tab/Sections** page.

Unit Performance Lab

Perfecting Your Skills

In this performance lab, you will review the material from the Custom Fields and Page Layouts unit. Complete the exercises and wait for the instructor to check your work.

1. Create a new custom field named **Quote Sent** in the **Opportunity** application**.**

   Set the **Type** to **Yes/No Checkbox**. Add the field to the **New Custom Fields** group**.** Check the **Opportunity Detail** page to make sure the new field is visible.

2. Delete (mark as inactive) the **Products Interested In** custom field that you created during this lesson. Check the **Opportunity Detail** page to make sure the field is no longer visible. Note: The field label will still be visible until you remove it from the Field Group/Page Layout.

3. Create the following new custom fields in the **Contact** application:

Field Name	Type	Drop-down menu options
Interest Level	Character String	Already a customer, Very Interested, Mildly Interested, Not Interested, and Remove from Mailing List
First Contacted By	Entity – User	N/A
Newsletter	Yes/No Checkbox	N/A

4. Create a new Contact Field Group with the following settings:

   Description: Survey Results
   Section Header: Survey Results
   Background Color: Green
   Column: 1 Column Mode

   Add the **Interest Level**, **First Contacted By** and **Newsletter** custom fields to the new field group. Add the new field group to the **Contact Detail Page: Main Section**. Check the **Contact Detail** page to make sure the group was configured correctly.

5. Add the default field **Sex** to the **Contact Detail Page: Main Section** and change the label for the field to **Gender**.

6. In the **Contact** application, change the sub tabs labeled **Fields 3** and **Fields 4** to **Personal** and **Rentals** and unhide them.

✪ When you finish the exercises, raise your hand and wait for the instructor to review your work.

Applying Your Knowledge

1. What is the difference between a custom field and a default field and how can you tell which is which by looking at them?

2. How would you change the page layout for the sub tab labeled **Personal**?

3. Which custom field type would you use in order to provide a drop-down menu where more than one option can be chosen?

Performance Lab Answers

Perfecting Your Skills

The Instructor will review the lab answers with everyone once everyone has finished.

Applying Your Knowledge

1. A default field is included in the application by default, while a custom field is one that you create. You can edit or completely remove a custom field from the application, but you cannot delete a default field, although you can change the field label and hide the field on page layouts. In a list of fields, the custom fields are preceded by the **(Custom Field)** label.
2. **Personal** is the new sub tab label for the Fields 3 sub tab. To edit the page layout for the sub tab, click on the **My Account** tab, click on the **Organization/Contact** heading, click on the **Setup Page Layout** link, and click on the **Contact Detail Page: Fields 3 Subtab** link to edit the page layout for the sub tab.
3. You would use the Multiple String Values field type.

Unit 4: Importing and Synchronizing Data

Unit Objectives:

- Understand and create CSV files.
- Import data into PlanPlus Online from other databases.
- Set up and configure synchronization settings with Microsoft Outlook.

Lesson 1: Comma Separated Value Files

You may find that you have a lot of valuable information stored in other applications that you would like to have in PlanPlus Online. For example, you may already have a list of contacts in Excel or in a contact management system, such as Act or Goldmine. Rather than manually entering that contact information into PlanPlus Online, you can import the information from the other application. Before you can import the information into PlanPlus Online, you must go into the other application and save the data in a format that PlanPlus Online can read.

> ✪ You can also import your Microsoft Outlook Contact information into PlanPlus Online.

Understanding Comma Separated Value Files

Comma Separated Value files, also known as .CSV files, are commonly used to transfer large amounts of tabular data between unconnected applications. You can easily create and edit .CSV files using common spreadsheet applications, such as Microsoft Excel.

The application you use to store your data, (i.e. – Act, Goldmine, Lotus Notes, Sales Force, Sage, etc.) will most likely have an export feature, which will allow you to export your data directly to a .CSV file. If the application does not allow you to export to a .CSV file, you can export to a spreadsheet format, such as Microsoft Excel, and then use Excel to convert to a .CSV file.

> ✪ When importing data into PlanPlus Online, it is important to note that you cannot import data with any empty fields in the first column of the spreadsheet or the last column of the spreadsheet. Prior to importing your data, review it to make sure all of the necessary fields contain data.

Once you save your data to a .CSV file, you can import it into PlanPlus Online.

Creating a .CSV File

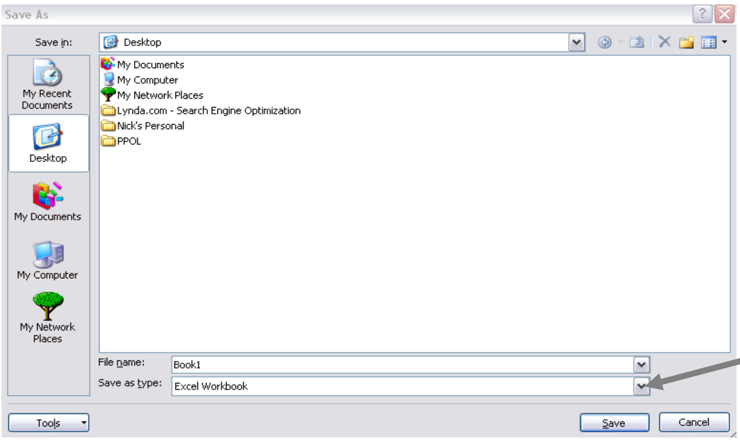
To create a .CSV file using Microsoft Excel, use the following steps:

1. In Microsoft Excel, open the file you want to save as a .CSV file.

   > ✪ The following steps cover creating a .CSV file from Microsoft Excel version 2003. You can also use a different version of Excel or another spreadsheet application to create a .CSV file.

2. Click on the **File** menu and click on **Save As**.

Excel displays the **Save As** dialog box.



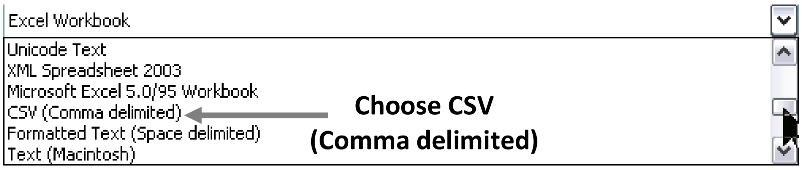
Click here to choose CSV (Comma delimited)

3. Navigate to the location where you want to save the .CSV file.

   ✪ We recommend saving the file to your Desktop so that it is easy to locate.

4. If necessary, enter the file name for the .CSV file in the **File name** box.

5. Click on the **Save as type** drop-down menu and click on **CSV (Comma delimited).**



6. Click on **Save**.

   Excel saves the .CSV file to the specified location.

   ✪ Excel may display a warning message about features that are incompatible with .CSV format. Click on the **Yes** button if you receive the message.

Activity –Create another .CSV file using the AdminCOST Excel file stored on the flash drive.

Lesson 2: Importing Data Into PlanPlus Online

Once you have created a .CSV file, you are ready to import the data into PlanPlus Online. If the data contains fields that are not included in PlanPlus Online by default, you should create the necessary custom fields and map them to the desired location prior to beginning the import process. Refer to Unit 3 for more information on custom fields.

Performing a Basic Import

A basic import is when you import a group of contacts or organizations without any relationships to other contacts, organizations, etc.

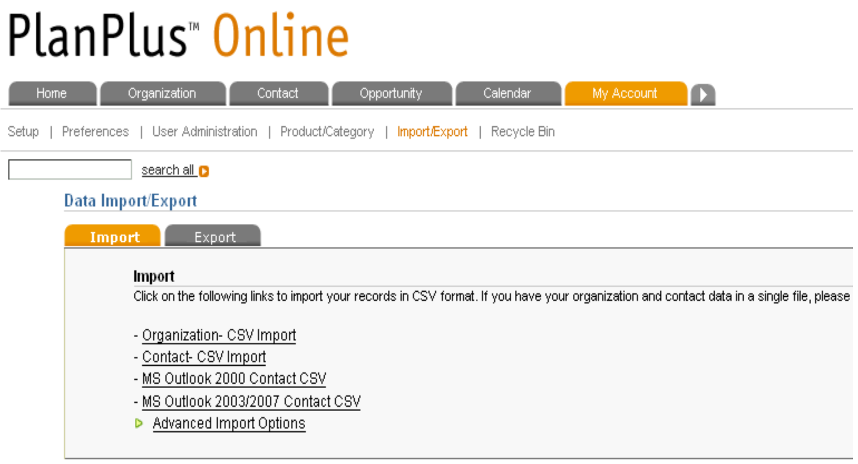
To perform a basic import, use the following steps:

1. Click on the **My Account** tab.

   PlanPlus Online displays the **My Account** page.

2. In the Sub Menu, click on **Import/Export**.

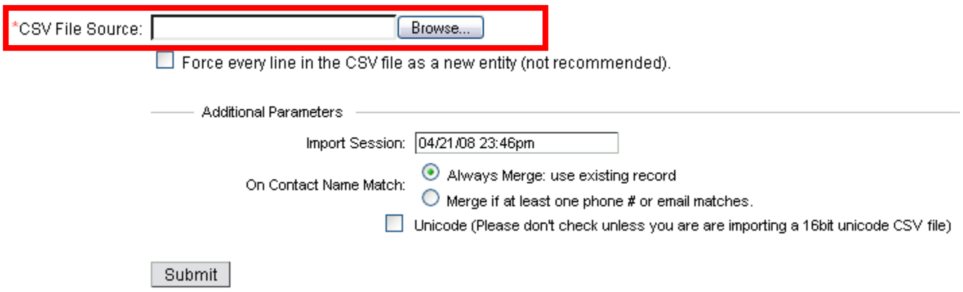
   PlanPlus Online displays the **Data Import/Export** page.



✪ The **Data Import/Export** page contains links to import organization and contact information in .CSV format and links to import contact information from Microsoft Outlook. The Outlook options are configured specifically for Outlook's export format. There is also a link to access **Advanced Import Options**, which are covered in the next section.

3. Click on the link for the import type you want to perform.

   PlanPlus Online displays the **Import Wizard: CSV File Source** page.



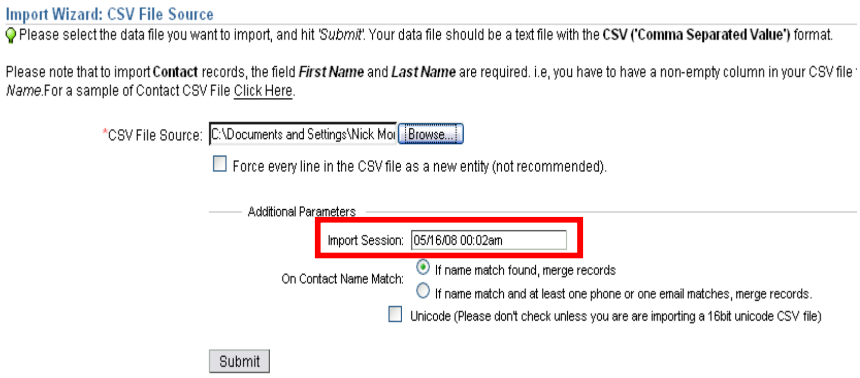
4. Click on the **Browse** button for the **CSV File Source** field.

   PlanPlus Online displays the **Choose file** dialog box.

5. Locate and click on the **.CSV** file you want to import.

6. Click on the **Open** button.

   PlanPlus Online returns you to the **Import Wizard: CSV File Source** page and displays the file name you selected in the **CSV File Source** field.



7. Enter a descriptive name for the import in the **Import Session** field.

   ✪ It is important to name the import session because it helps with troubleshooting. If something goes wrong with the import session, you can run an advanced search for the import session and delete all of the records.

8. To specify how you want PlanPlus Online to deal with duplicate records, select one of the following options for the **On Contact/Organization Name Match** field:

   - If you want PlanPlus Online to merge two records that contain the same first and last name or organization name, click on the **If name match found, merge records** option.

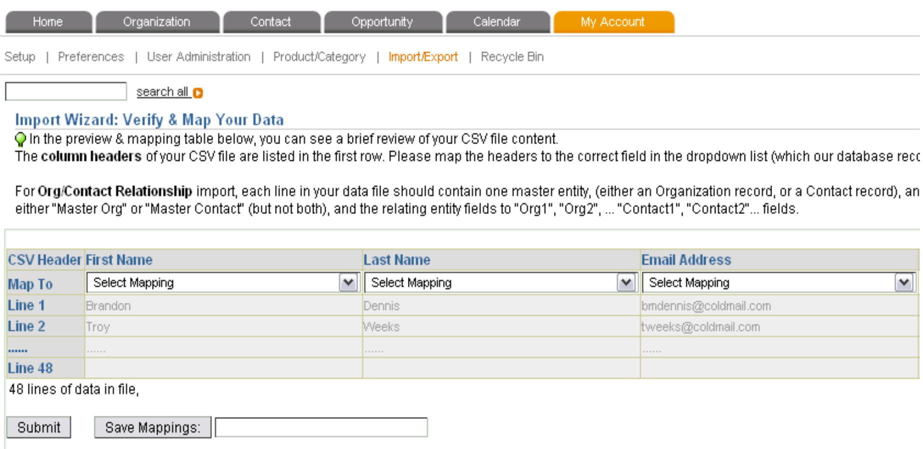
   - If you want PlanPlus Online to merge two records that contain the same first and last name or organization name only if at least one phone number also matches, select the second option.

   - The **Force every line in the CSV file as a new entity** option creates a new entity for every line of data regardless of whether or not it is a duplicate record. This option is not recommended.

   - The **Unicode** check box is used when you are importing data in a language other than English. For more information on this, contact PlanPlus Online Support.

9. Click on the **Submit** button.

   PlanPlus Online displays the **Import Wizard: Verify & Map Your Data** page.



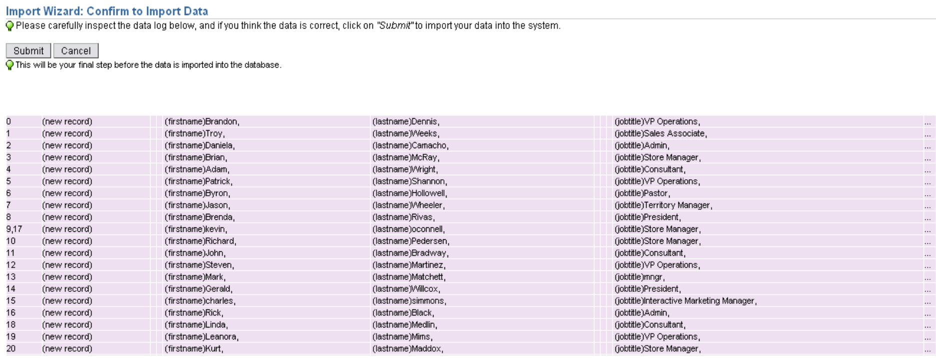
   - You must now link the fields in your .CSV file to the associated fields in PlanPlus Online so that PlanPlus Online knows where to store the new field data. This process is called mapping. The field names from the .CSV file are listed in the first row (**CSV Header**).

10. For each field in the .CSV file, click on the **Map To** drop-down menu and click on the PlanPlus Online field that you want to map to the .CSV field.

- To make importing in the future easier, you can save these field mappings by entering a name for the mapping session in the **Save Mappings** field. This option is helpful if you plan to import similar data in the future.

11. When you are finished mapping the fields, click on the **Submit** button.

    PlanPlus Online displays the **Import Wizard: Confirm to Import Data** page.



- The **Confirm to Import Data** page contains a row for each new record that will be created. The actual field data is preceded by the field name.

- When PlanPlus Online merges duplicate records, it displays the record numbers separated by commas in the first column.

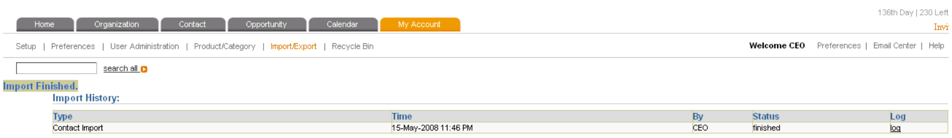
- If a record is new, PlanPlus Online displays **(new record)** in the second column. If the record is already present in the application database, PlanPlus Online displays **(update)** instead.

12. Review the data to make sure the field mappings are correct.

13. When you are finished, click on the **Submit** button.

    PlanPlus Online begins the import process.

    When PlanPlus Online completes the import process, it displays the **Import History** page.



- The **Import History** page shows the details of all the import sessions for the current user, including the type, time, user name, status and log.

Advanced Importing Options

In the previous section, we imported data into a single application (contact information). PlanPlus Online also allows you to import multiple types of data and relationships, for example, contacts, organizations, and sales team data. You can also import other types of information, such as tasks, appointments, and opportunities.

The following table describes the advanced import types and the minimum fields that are necessary in order to complete the import.

Import Type	Use When	Columns Needed (Data)
Org/Contact/ Sales Team	Importing contacts and organizations that are linked to a sales team	Organization Name, Contact First Name and Last Name
Org/Contact Relationship	Importing relationships between contacts and organizations	Organization Name, Contact First Name and Last Name
Sales Team	Importing Sales Team Records	Team Member and one of the following fields: Organization Name, Contact First/Last Name, Opportunity Name
Opportunity	Importing opportunities	Opportunity Name, Customer (Organization or Contact)
Customer-Opportunity-Sales Team	Importing customers that are linked to opportunities and sales teams	Opportunity Name and either Contact First Name and Last Name or Organization Name
Appointment	Importing Appointment information	Appointment Name and Start Date
Task	Importing Task information	Task Name
Product	Importing Product information	Product Name and Product Category Key
Bug	Importing Bugs	Bug Name and Note

✪ If the data you are importing contains fields that are not included in PlanPlus Online by default, you should create the necessary custom fields before beginning the import process. Refer to Unit 3 for more information on custom fields.

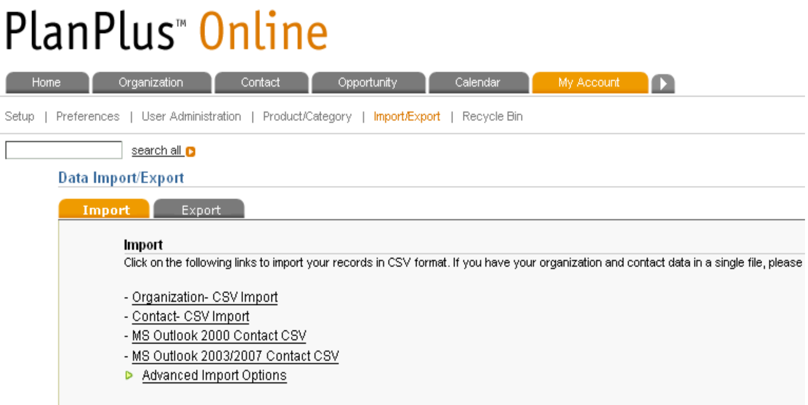
To import data using advanced options, use the following steps:

1. Click on the **My Account** tab.

   PlanPlus Online displays the **My Account** page.

2. In the Sub Menu, click on **Import/Export**.

   PlanPlus Online displays the **Data Import/Export** page.

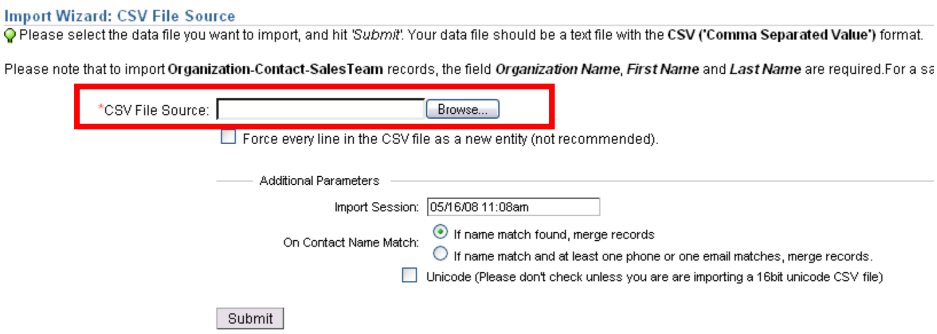


3. Click on the **Advanced Import Options** link.

PlanPlus Online displays the **Advanced Import Options** on the **Data Import/Export** page.

4. Click on the link for the import type you want to perform.

   PlanPlus Online displays the **Import Wizard: CSV File Source** page for the import type.



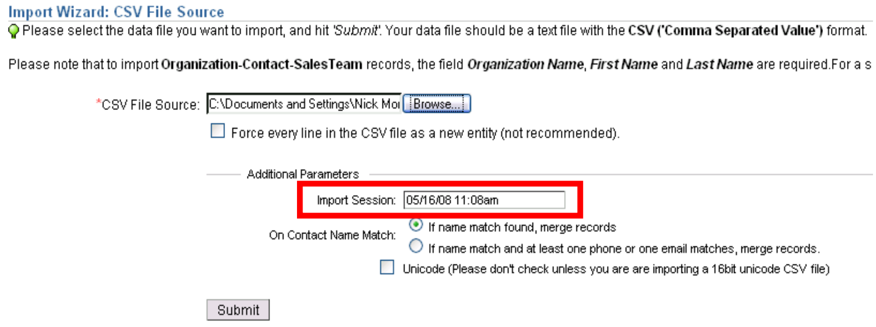
5. Click on the **Browse** button for the **CSV File Source** field.

   PlanPlus Online displays the **Choose file** dialog box.

6. Locate and click on the **.CSV** file you want to import.

7. Click on the **Open** button.

PlanPlus Online returns you to the **Import Wizard: CSV File Source** page.



8. Enter a descriptive name for the import in the **Import Session** field.

9. To specify how you want PlanPlus Online to deal with duplicate records, select one of the following options for the **On Contact/Organization Name Match** field:

   - If you want PlanPlus Online to merge two records that contain the same first and last name or organization name, click on the **If name match found, merge records** option.

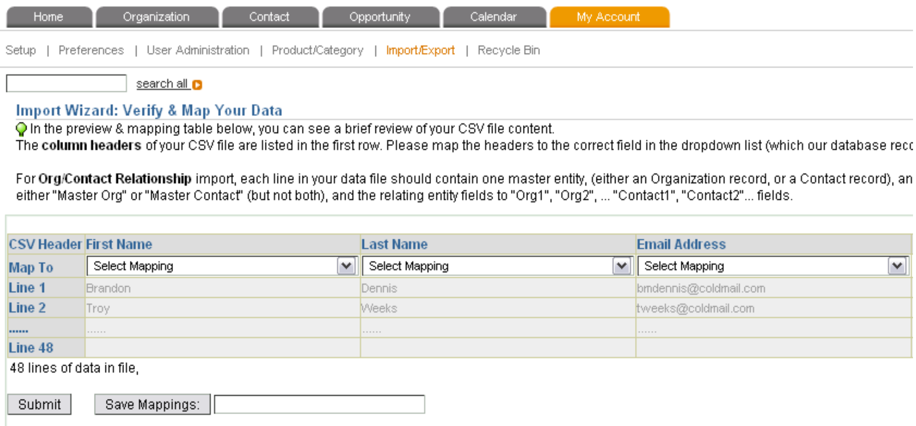
   - If you want PlanPlus Online to merge two records that contain the same first and last name or organization name only if at least one phone number also matches, select the second option.

✪ The **Force every line in the CSV file as a new entity** option creates a new entity for every line of data regardless of whether or not it is a duplicate record. This option is not recommended.

✪ The **Unicode** check box is used when you are importing data in a language other than English. For more information on this, contact PlanPlus Online Support.

10. Click on the **Submit** button.

PlanPlus Online displays the **Import Wizard: Verify & Map Your Data** page.



- ✪ You must now link the fields in your .CSV file to the associated fields in PlanPlus Online so that PlanPlus Online knows where to store the new field data. This process is called mapping. The field names from the .CSV file are listed in the first row (**CSV Header**).

11. For each field in the .CSV file, click on the **Map To** drop-down menu and click on the PlanPlus Online field that you want to map to the .CSV field.

- ✪ Because you are using the advanced import options and are importing data for more than one application at a time, PlanPlus Online displays the application name before each field name in the **Map To** drop-down menu. Make sure you select the correct application and the correct field. For example, if you are mapping to the Contact First Name field, you would select **(Contact) * First Name** from the **Map To** drop-down menu.

- ✪ You can save these field mappings to make importing in the future easier by entering a name for the mapping session in the **Save Mappings** field. This option is helpful if you plan to import similar data in the future.

12. When you are finished mapping the fields, click on the **Submit** button.

PlanPlus Online displays the **Import Wizard: Confirm to Import Data** page.

0,1,6,10,19,24,30,35,43	(new record)	(name)P&L Properties LLC,	...
2,8,33,46	(new record)	(name)Sears,	...
3,11,22,29,32,36,41	(new record)	(name)Emergent BioSolutions,	...
4	(new record)	(name)The LifePoint Church,	...
5	(new record)	(name)Orthofix, Inc.,	...
7	(new record)	(name)University,	...
9	(new record)	(name)Virtually Savvy Va, Inc,	...
12	(new record)	(name)JDB Innovation,	...
13	(new record)	(name)PPG Industries, Inc.,	...
14	(new record)	(name)Mark Matchett,	...
15	(new record)	(name)Colortyme,	...
16	(new record)	(name)Charles,	...
17	(new record)	(name)Trilogy Pools,	...
18	(new record)	(name)Accelerate Consulting,	...
20	(new record)	(name)Freelance Paralegal,	...
21	(new record)	(name)COMPLETExRM,	...
23	(new record)	(name)Powerteam Interantional,	...
25	(new record)	(name)DEI,	...
26	(new record)	(name)Lunar Concept. LLC,	...
27	(new record)	(name)Molina Investments Group LLC,	...
28	(new record)	(name)Epic Producers,	...
31	(new record)	(name)Home,	...
34	(new record)	(name)Choice Realty Marketing, LLC,	...
37	(new record)	(name)Wall Street Internal Medicine,	...
38	(new record)	(name)Wall of Famer,	...
39	(new record)	(name)Synergy,	...
40	(new record)	(name)Silicon Valley Mortgage,	...
42	(new record)	(name)Living Hope 1st UPC,	...
44	(new record)	(name)Peter Braswell,	...
45	(new record)	(name)FNA Assoc.,	...

0	(update)	(firstname)Brandon,	(lastname)Dennis,	(jobtitle)VP Operations,	...
1	(update)	(firstname)Troy,	(lastname)Weeks,	(jobtitle)Sales Associate,	...
2	(update)	(firstname)Daniela,	(lastname)Camacho,	(jobtitle)Admin,	...
3	(update)	(firstname)Brian,	(lastname)Mcray,	(jobtitle)Store Manager,	...
4	(update)	(firstname)Adam,	(lastname)Wright,	(jobtitle)Consultant,	...
5	(update)	(firstname)Patrick,	(lastname)Shannon,	(jobtitle)VP Operations,	...
6	(update)	(firstname)Byron,	(lastname)Hollowell,	(jobtitle)Pastor,	...
7	(update)	(firstname)Jason,	(lastname)Wheeler,	(jobtitle)Territory Manager,	...
8	(update)	(firstname)Brenda,	(lastname)Rivas,	(jobtitle)President,	...
9,17	(update)	(firstname)Kevin,	(lastname)Oconnell,	(jobtitle)Store Manager,	...
10	(update)	(firstname)Richard,	(lastname)Pedersen,	(jobtitle)Store Manager,	...
11	(update)	(firstname)John,	(lastname)Bradway,	(jobtitle)Consultant,	...
12	(update)	(firstname)Steven,	(lastname)Martinez,	(jobtitle)VP Operations,	...
13	(update)	(firstname)Mark,	(lastname)Matchett,	(jobtitle)Manager,	...
14	(update)	(firstname)Gerald,	(lastname)Willcox,	(jobtitle)President,	...
15	(update)	(firstname)Charles,	(lastname)Simmons,	(jobtitle)Interactive Marketing Manager,	...
16	(update)	(firstname)Rick,	(lastname)Black,	(jobtitle)Admin,	...
18	(update)	(firstname)Linda,	(lastname)Medlin,	(jobtitle)Consultant,	...
19	(update)	(firstname)Leanora,	(lastname)Mims,	(jobtitle)VP Operations,	...
20	(update)	(firstname)Kurt,	(lastname)Maddox,	(jobtitle)Store Manager,	...
21	(update)	(firstname)Tom,	(lastname)Pisor,	(jobtitle)Consultant,	...
22	(update)	(firstname)Cassandra,	(lastname)Koziol,	(jobtitle)VP Operations,	...
23	(update)	(firstname)Victoria,	(lastname)Garriett Lampkin,	(jobtitle)Regional Sales Manager,	...
24	(update)	(firstname)Shane,	(lastname)Holdernesse,	(jobtitle)Store Manager,	...

Brandon Dennis	CONTACT_OF	P&L Properties LLC
Troy Weeks	CONTACT_OF	P&L Properties LLC
Daniela Camacho	CONTACT_OF	Sears
Brian Mcray	CONTACT_OF	Emergent BioSolutions
Adam Wright	CONTACT_OF	The LifePoint Church
Patrick Shannon	CONTACT_OF	Orthofix, Inc.
Byron Hollowell	CONTACT_OF	P&L Properties LLC
Jason Wheeler	CONTACT_OF	University
Brenda Rivas	CONTACT_OF	Sears
Kevin Oconnell	CONTACT_OF	Virtually Savvy Va, Inc
Richard Pedersen	CONTACT_OF	P&L Properties LLC
John Bradway	CONTACT_OF	Emergent BioSolutions
Steven Martinez	CONTACT_OF	JDB Innovation
Mark Matchett	CONTACT_OF	PPG Industries, Inc.
Gerald Willcox	CONTACT_OF	Mark Matchett
Charles Simmons	CONTACT_OF	Colortyme
Rick Black	CONTACT_OF	Charles
Kevin Oconnell	CONTACT_OF	Trilogy Pools
Linda Medlin	CONTACT_OF	Accelerate Consulting
Leanora Mims	CONTACT_OF	P&L Properties LLC
Kurt Maddox	CONTACT_OF	Freelance Paralegal
Tom Pisor	CONTACT_OF	COMPLETExRM
Cassandra Koziol	CONTACT_OF	Emergent BioSolutions
Victoria Garriett Lampkin	CONTACT_OF	Powerteam Interantional
Shane Holdernesse	CONTACT_OF	P&L Properties LLC

- ✪ The **Confirm to Import Data** page contains a row for each new record that will be created. The actual field data is preceded by the field name.
- ✪ When importing to multiple applications at the same time, PlanPlus Online divides the page into groups based on the application. The data that is being imported into each application displays in a different color.
- ✪ When PlanPlus Online merges duplicate records, it displays the record numbers separated by commas in the first column.
- ✪ If a record is new, PlanPlus Online displays **(new record)** in the second column. If the record is already present in the application database, PlanPlus Online displays **(update)** instead. If you click on the **(update)** link, PlanPlus Online takes you to the record in the application.

13. Review the data to make sure the field mappings are correct.
14. When you are finished, click on the **Submit** button.

    PlanPlus Online begins the import process.

- ✪ The import process can take some time. The larger the file, the longer the process will take. Please do not hit Refresh or try to resend the information.

When PlanPlus Online completes the import process, it displays the **Import History** page.

Lesson 3: Synchronizing PlanPlus Online with MS Outlook

You can synchronize your PlanPlus Online data (contacts, tasks, and appointments) with Microsoft Outlook through the CompanionLink Synchronization Utility program. By using the synchronization tool you are able to keep the data on your computer in sync with your data on the web. This allows you to store your PlanPlus Online information on your computer so that you can access the data even when you are without an internet connection.

The following are some features of CompanionLink:

- CompanionLink allows you to keep Contacts, Tasks, and Appointments consistent and "in-sync" between Microsoft Outlook and PlanPlus Online even as you add and edit information from within either application.

- CompanionLink is a small application that you install on the computer where you are running Outlook. If you run Outlook from multiple computers, you can only synchronize from one computer. Synchronizing from different Outlook data sources may lead to duplicates in each database.

- PlanPlus Online flags any Outlook Contact information as private data. If you want to share those contacts with other users in your PlanPlus Online account, you will have to clear the **Private Contact** check box that appears in the contact record.

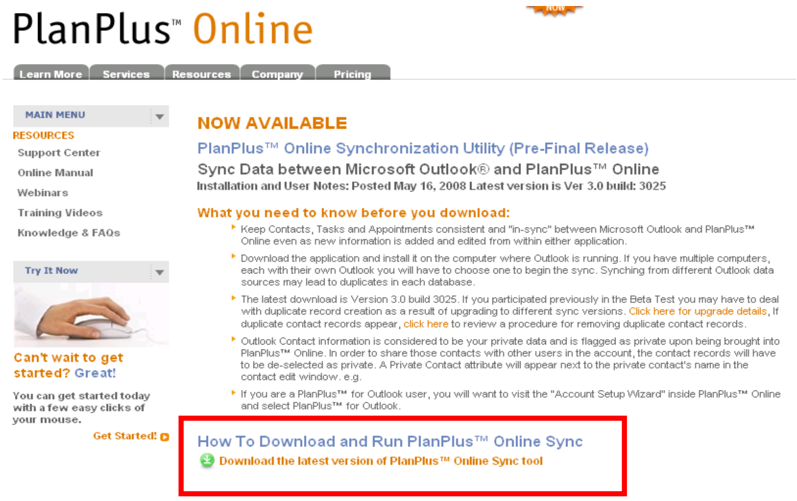
Configuring Synchronization Settings

Before you can synchronize your data, you must install the CompanionLink application and configure the synchronization settings. Depending on your version of windows, the dialog boxes may appear slightly different.

To configure your synchronization settings, use the following steps:

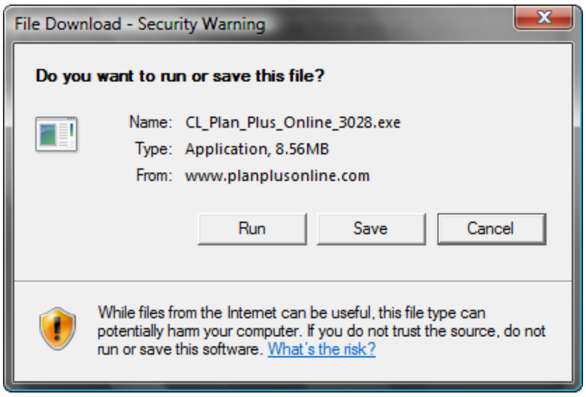
1. Navigate to the **www.planplusonline.com/sync** website.

PlanPlus Online displays the following web page.



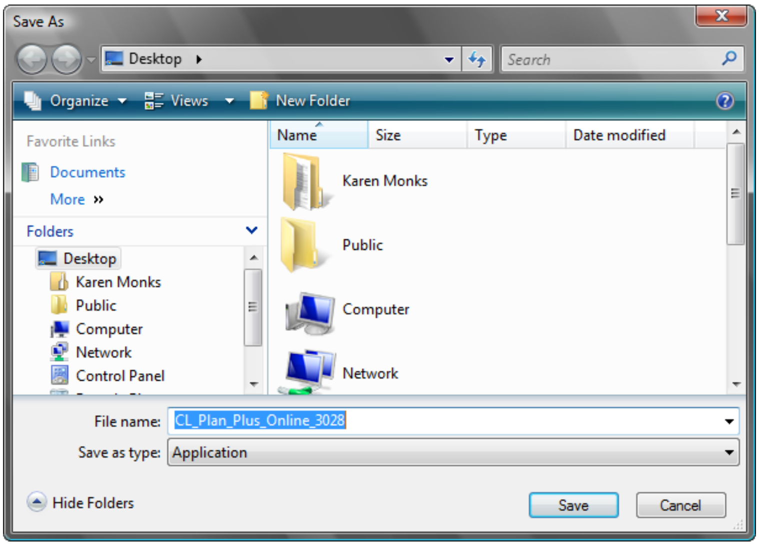
2. Click on the **Download the latest version of PlanPlus Online SYNC tool** link.

PlanPlus Online displays the **File Download** dialog box.



3. Click on **Save**.

PlanPlus Online displays the **Save As** dialog box.



4. Navigate to the folder where you want to store the installation file.

   ✪ We recommend saving the file to your Desktop.

5. Click on **Save**.

   PlanPlus Online saves the installation file to your computer.

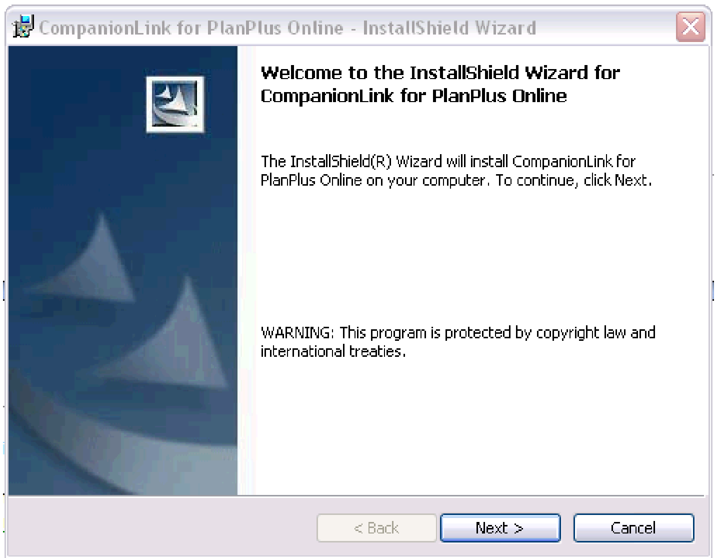
   ✪ Windows may display a **Download Complete** dialog box. If so, click on **Close**.

   If you saved the file to your Desktop, you will see the following icon.

6. Double-click on the icon to begin installing the CompanionLink application.

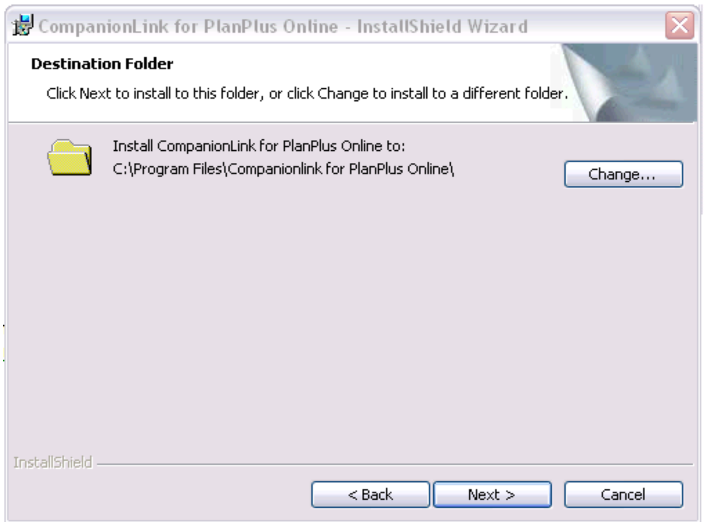
   ✪ Windows may display a security warning. If it does, click on the **Run** button.

CompanionLink displays the following dialog box.



7. Click on **Next**.

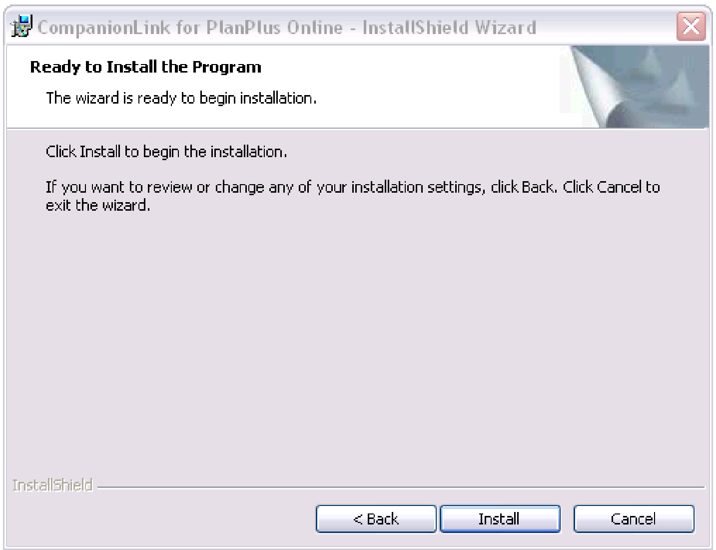
CompanionLink displays the following dialog box.



8. If you want to change the folder where CompanionLink will be installed, click on **Change**, browse to the folder where you want to install the application, and click on **OK**.

9. Click on **Next**.

CompanionLink displays the following dialog box.



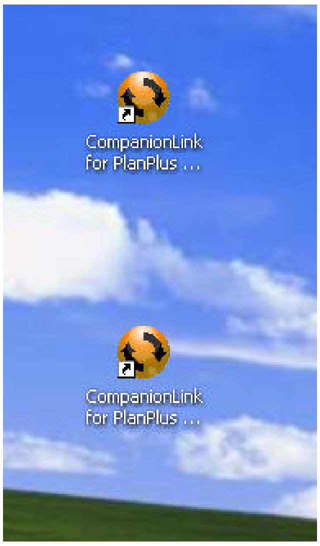
10. Click on **Install**.

When the installation is complete, CompanionLink displays the following dialog box.

11. Click on **Finish**.

CompanionLink closes the dialog box.

✪ The Installation process adds two icons to your Desktop. One is a setup icon and the other is the icon to start the application. You can use either icon to run a synchronization.

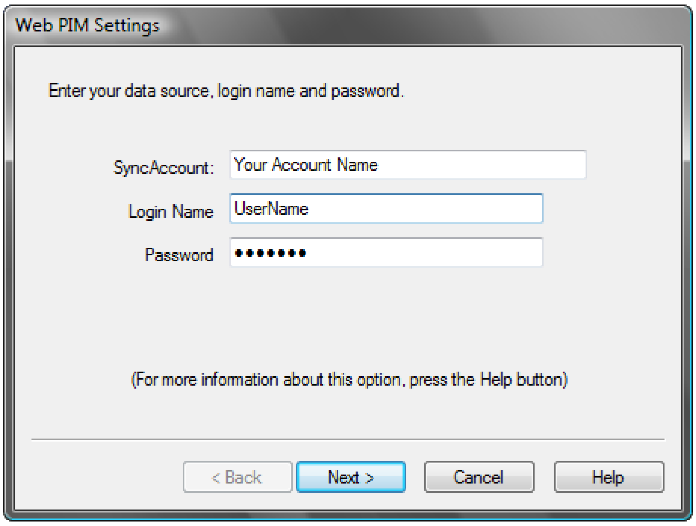


12. Double-click on one of the icons to begin configuring CompanionLink to synchronize with Microsoft Outlook.

    CompanionLink starts the **CompanionLink Configuration Wizard** and displays the following dialog box.

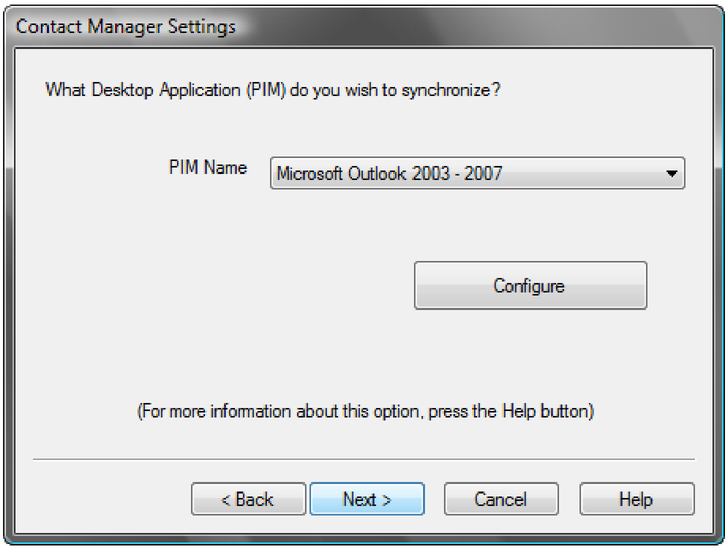
13. Click on **Next.**

CompanionLink displays the **Web PIM Settings** dialog box.



14. Enter the Login information for your PlanPlus Online account and click on **Next**.

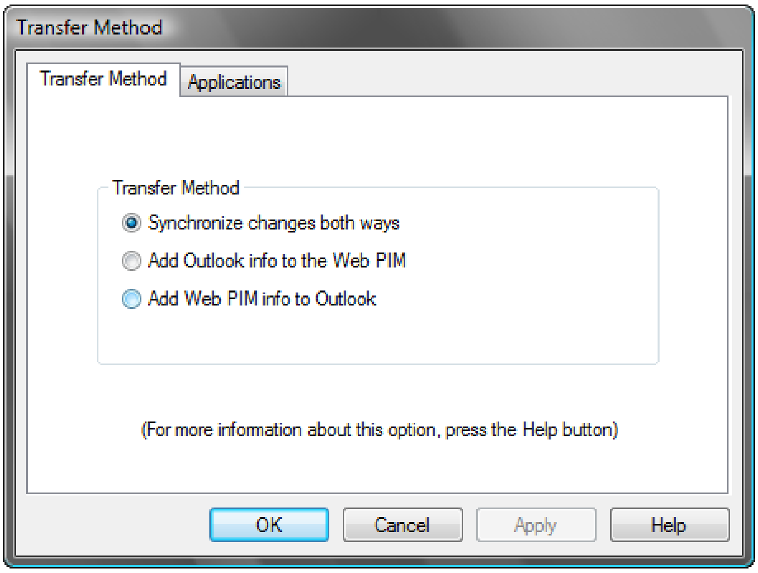
    CompanionLink displays the **Contact Manager Settings** dialog box.



- ✪ The PIM Name is the name of the desktop application you want to synchronize with PlanPlus Online.
- ✪ Microsoft Outlook 2003-2007 is the default choice. Currently there are no other choices.

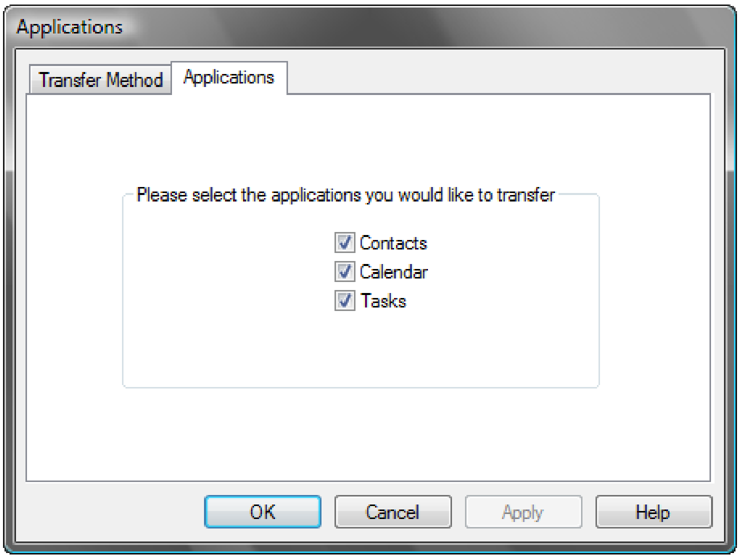
15. Click on the **Configure** button.

CompanionLink displays the **Transfer Method** dialog box.



16. Choose from one of the following transfer methods:
    - Click on **Synchronize changes both ways** if you want to update Outlook and PlanPlus Online when you sync. New records from Outlook will be transferred to PlanPlus Online and new records from PlanPlus Online will be transferred to Outlook.
    - Click on **Add Outlook info to the Web PIM** if you want to update PlanPlus Online with information from Outlook. No information from PlanPlus Online will transfer to Outlook
    - Click on **Add Web PIM info to Outlook** if you want to update Outlook with information from PlanPlus Online. No information from Outlook will transfer to PlanPlus Online.
17. Click on the **Applications** tab.

CompanionLink displays the **Applications** dialog box.



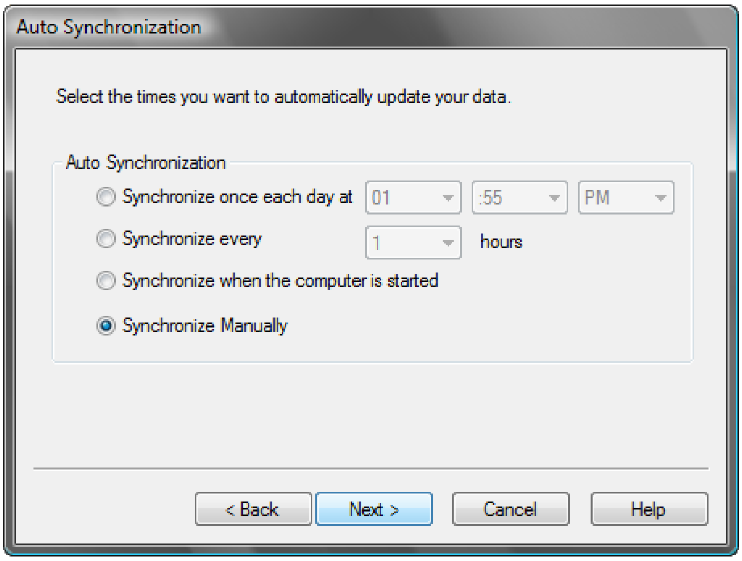
✪ The **Applications** dialog box lists the types of data you can synchronize. If you don't want to synchronize a particular type of data, clear its check box.

18. Choose the types of data you want to transfer and click on **OK**.

    CompanionLink returns to the **Contact Manager Settings** dialog box.

19. Click on **Next**.

    CompanionLink displays the **Auto Synchronization** dialog box.

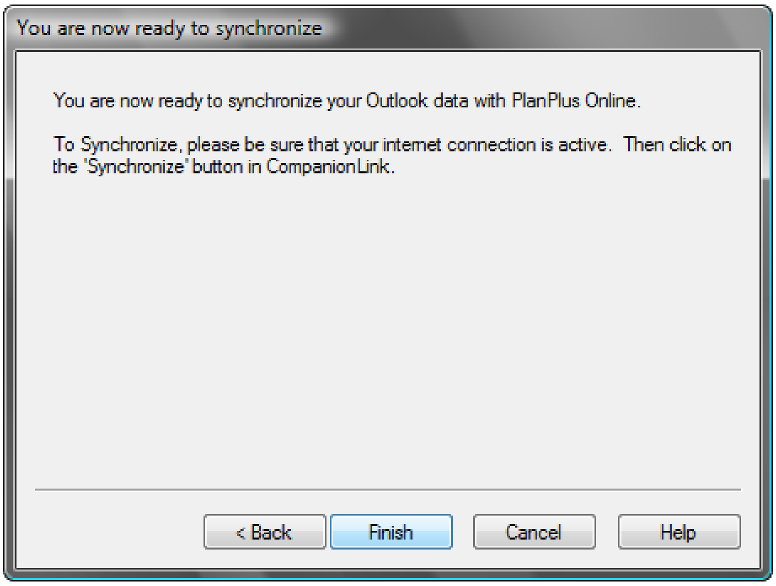


- The **Auto Synchronization** dialog box allows you to schedule an automatic synchronization for a particular time of day. You can also choose to synchronize manually.

- Until you are comfortable with the process, we suggest manual synchronization.

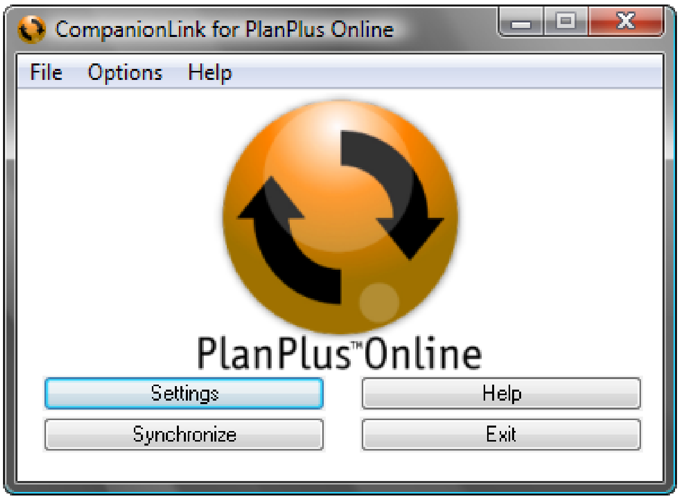
20. Select the synchronization setting you want and click on **Next**.

    CompanionLink displays the following dialog box.



21. Click on **Finish**.

    CompanionLink displays the **CompanionLink for PlanPlus Online** window.



- You are now ready to launch the synchronization process. **As a precaution, you should backup your Outlook information prior to synchronizing.**

- To synchronize your data, click on the **Synchronize** button in the **CompanionLink for PlanPlus Online** window or launch the executable icon from your Desktop. CompanionLink performs the synchronization and displays a message when it is complete. Click on **OK**.

- To exit the **CompanionLink for PlanPlus Online** window, click on **Exit**.

Unit Performance Lab

Perfecting Your Skills

In this unit, you learned how to create .CSV files and how to import those files into PlanPlus Online. You also learned how to synchronize data between PlanPlus Online and Outlook. The following performance lab allows you to review how to import and synchronize data. Once you are finished, wait for the instructor to review your work.

1. Open the **AdminPerformanceLab** worksheet in Microsoft Excel. Convert the worksheet to a .CSV file.

2. Import the data from the .CSV file into PlanPlus Online using the **Advanced Import Option** - **Organization-Contact-Sales Team** import type. Name the import session **Performance Lab**. Map each field in the .CSV file to the appropriate field in PlanPlus Online.

3. To make sure the data was imported correctly, access the Organization application, view the Detail page for an organization, and verify that the **Category** field has been updated (Organization Detail Page).

4. Configure your synchronization settings to synchronize when your computer starts. (Hint: You should launch the CompanionLink for PlanPlus Online Setup application.)

Applying Your Knowledge

1. Why is it important to name an import session?
2. When saving a .CSV file, where do we recommend you save it and why?
3. Explain the different merge options when configuring an import session.
4. Explain the automatic synchronization options.

Performance Lab Answers

The Instructor will review the answers with the entire group.

Applying Your Knowledge

1. You should name an import session so it is easier to troubleshoot if you receive an error.

2. We recommend you save the file to your Desktop so that it is easy to locate.

3. The merge options are as follows:

   If name match found, merge records – This option merges records if the names match.

   If name match and at least one phone or email matches, merge records – This option merges records only if the name and at least one phone number or email address also match.

4. The automatic synchronization options are as follows:

   Synchronize once each day at – This option automatically synchronizes your data once a day at a specified time.

   Synchronize every _ hours – This option automatically synchronizes your data every "X" number of hours.

   Synchronize when the computer is started - This option automatically synchronizes your data when you start your computer.

   Synchronize Manually – This option requires you to manually synchronize your data.

Unit 5: Email Templates, Advanced Search, and Lists

Unit Objectives:

- Create plain text and HTML email templates.
- Use the **Advanced Search** function to find data.
- Create **Contact Lists**.

Lesson 1: Email Templates

An **Email Template** is a saved email message that you can easily send to individuals or groups of people. For example, if you routinely send messages to your clients to thank them for their business, you can create a generic template with your message so that you don't have to recreate it each time. Email templates can contain merge fields, which allow you to insert the contents of any field, including custom fields created by you, into your message (for example, the first name of a contact or the name of an organization). Merge fields allow you to repurpose the templates for multiple users. Using email templates, you can quickly execute mail merges and send messages to groups of people on a regular basis.

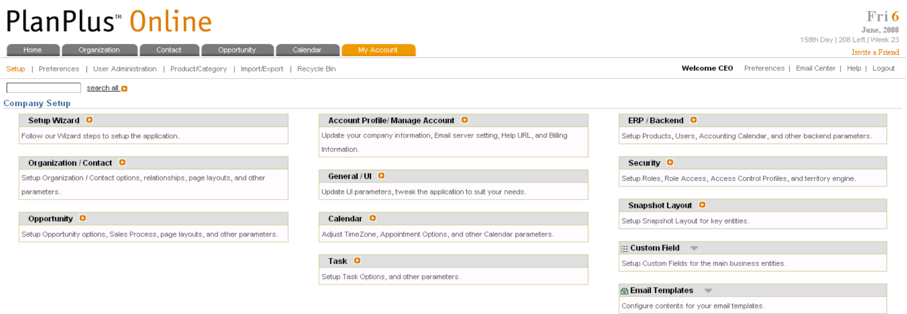
Once you create an email template, you can access it from various locations in the application, including the Email Center, My Account tab, Lists, Advanced Search, etc. This lesson will show you how to create and edit email templates.

Creating Email Templates

To create an email template, use the following steps:

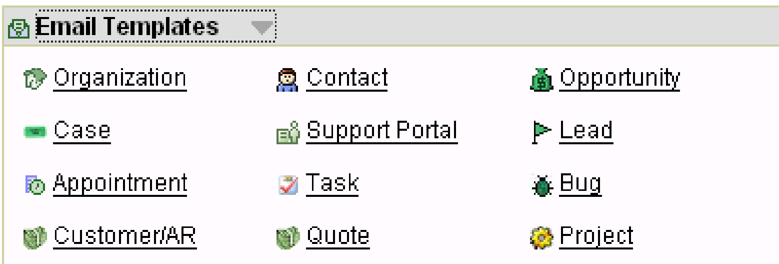
1. Click on the **My Account** tab.

   PlanPlus Online displays the **My Account** page.



2. Click on the **Email Templates** heading.

   PlanPlus Online displays the **Email Templates** section menu.

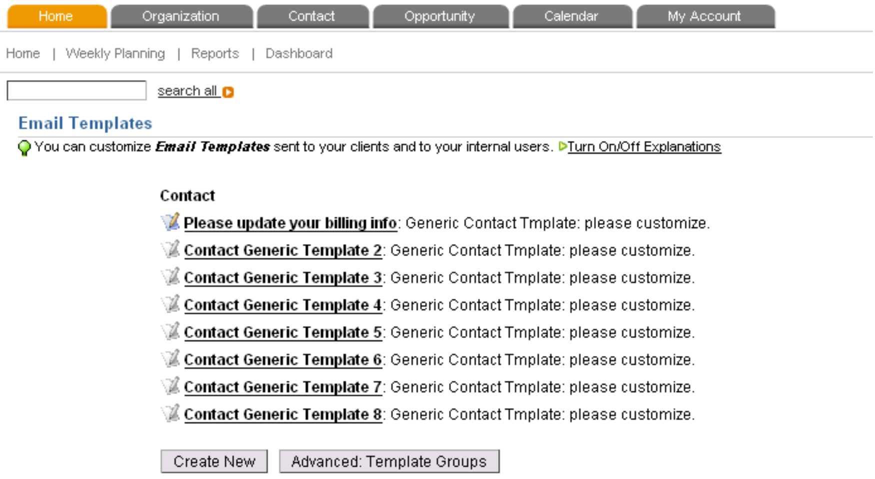


✪ You create email templates from within the application where you want to use them. For example, if you want to send an email out to a group of contacts, you would create the template in the **Contact** application.

- ✪ Some of the options on the **Email Templates** section menu apply only to the **PlanPlus Online Business** edition. These options will not work if you are not using the Business edition.

3. Click on the link for the application where you want to create the email template.

   PlanPlus Online displays the **Email Templates** page for the selected application.

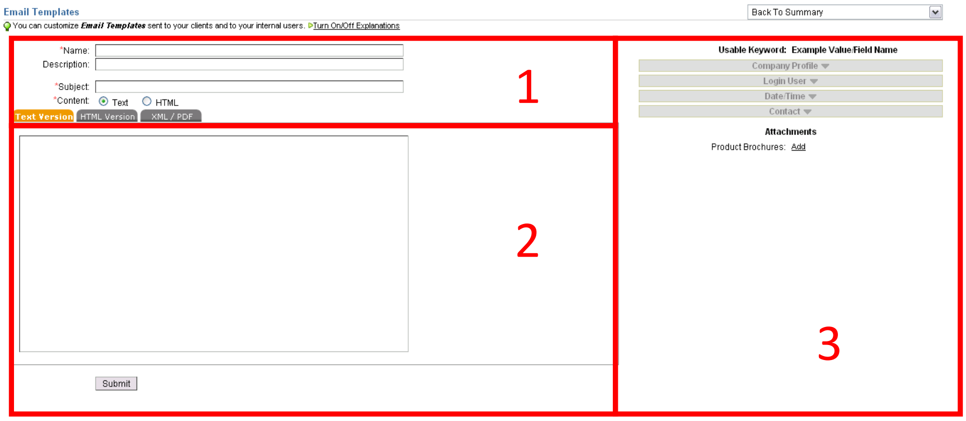


- ✪ PlanPlus Online provides you with a few generic templates that you can customize for your business. Any email templates that you create will also be listed here for future use or editing.

- ✪ The **Advanced: Template Groups** button allows you to create groups of templates for different campaigns, projects, etc.

4. Click on the **Create New** button.

PlanPlus Online displays the **Email Templates** page.



The **Email Templates** page has three sections as outlined above.

- 1 - **Name** and **Description** section – This is where you name the template and describe its contents and message.
- 2 - **Text/HTML/XML/PDF** version section – This is where you choose the format for your template. You can create the template in **Plain Text** format or in **HTML** format.
- 3 **- Mail Merge** – This section is where you will choose the fields you want to merge into your template.

✪ The following two sections explain how to create email templates in Plain Text and HTML format.

Creating a Plain Text Email Template

Plain text files have no formatting. There are no **bold**, *italics*, drop caps, or other fancy font effects. When formatting is not essential and you do not need to include graphics, plain text files are a good choice for exchanging information. Plain text email templates are similar to using Windows Notepad to create a document. The tools for editing and formatting information are very limited.

To create a plain text email template, use the following steps:

1. From the **Email Templates** page, make sure the **Text Version** tab is selected.

   ✪ The **Text Version** tab is the default tab. To switch to the **Text Version** tab, click on the **Text** option for the **Content** field.

2. Enter a **Name** and **Description** for the template.

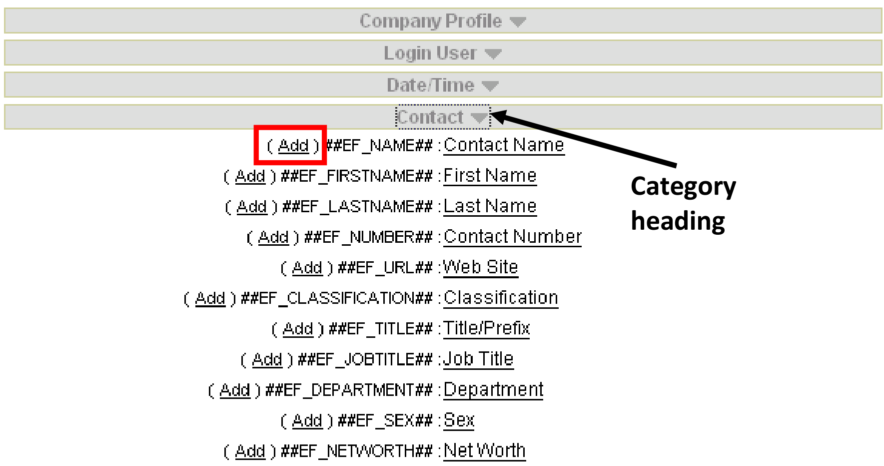
3. Enter an appropriate email subject in the **Subject** field.

   ✪ The **Subject** field becomes the subject of the email when you use the template to send a message.

4. Begin typing the email message in the box.

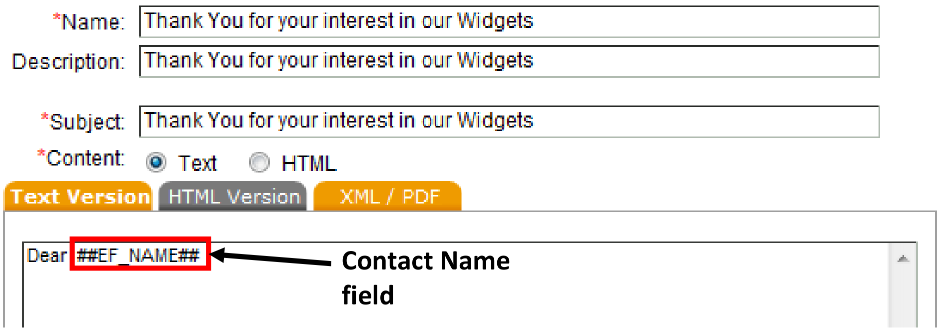
5. When you get to a location in the message where you want to insert a mail merge field, expand the category containing the field by clicking on the category heading in the **Mail Merge** section.

   PlanPlus Online displays the fields in the category you selected.



6. Click on the **Add** link for the field you want to insert.

PlanPlus Online adds the code for the field you selected to your message.



- When PlanPlus Online adds a field to the message, it highlights the field. Press the **right-arrow** key to deselect the field before pressing any other keys so you don't inadvertently delete the field.

- The field code is simply a group of characters. Make sure not to alter the field code in any way or PlanPlus Online will not recognize it. You can add punctuation marks before or after field codes.

7. Continue adding fields and typing your message.

8. When you are finished creating the template, click on the **Submit** button.

   PlanPlus Online saves the template and displays the **Email Templates** page.

- To edit a template, click on its link on the **Email Templates** page.

Creating an HTML Template

HTML (Hyper-Text Markup Language) is a programming language used to create web pages. It determines the structure of text-based information in a document by denoting certain text as links, headings, paragraphs, and lists. You can also use HTML to create interactive forms, embedded images, and other objects.

When you create an email template using HTML format, you can add text formatting, such as bold, italics, and color to your email templates. You can also add images, tables, links, and background colors. You don't need to know how to program in HTML to create an HTML-based email template. PlanPlus Online provides an easy-to-use toolbar that allows you to add HTML formatting to your template.

To create an HTML template, use the following steps:

1. From the **My Account** page, click on the **Email Templates** heading.

   PlanPlus Online displays the **Email Templates** section menu.

2. Click on the link for the application where you want to create the email template.

   PlanPlus Online displays the **Email Templates** page for the selected application.

3. Click on the **Create New** button.

   PlanPlus Online displays the **Email Templates** page.

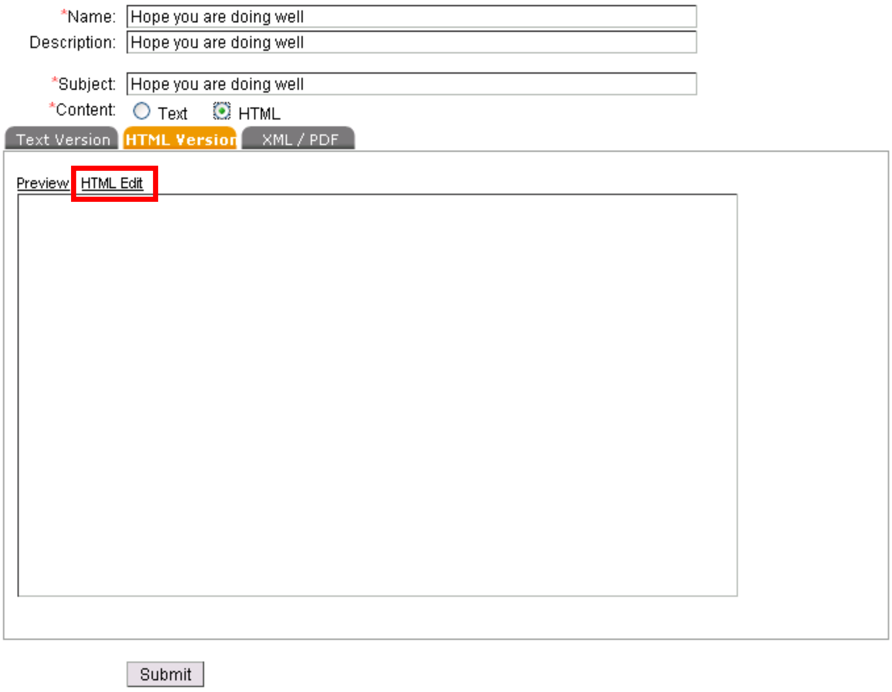
4. Enter a **Name** and **Description** for the template.

5. Enter an appropriate email subject in the **Subject** field.

   ✪ The **Subject** field becomes the subject of the email when you use the template to send a message.

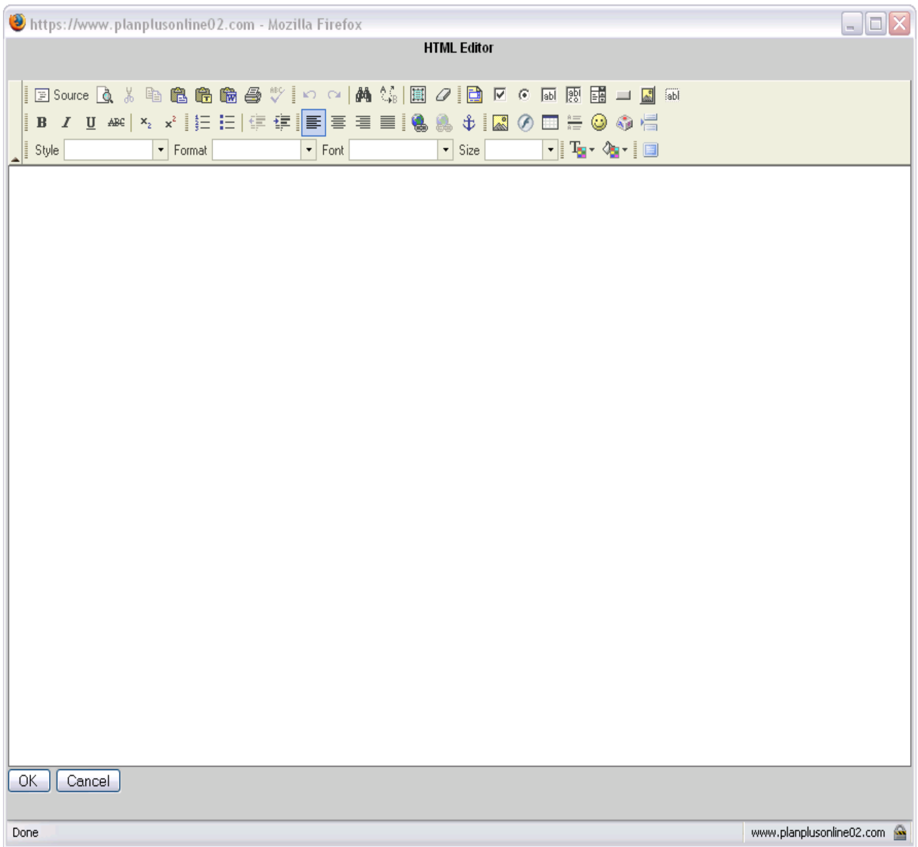
6. Click on the **HTML** option for the **Content** field.

   PlanPlus Online displays the **HTML Version** tab.

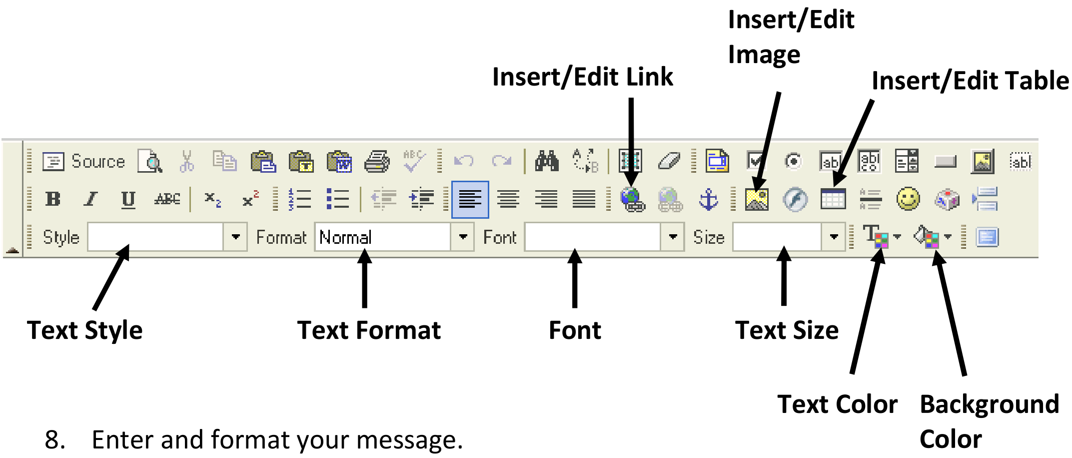


7. Click on the **HTML Edit** link.

PlanPlus Online opens the **HTML Editor** window, which contains an **HTML** toolbar and an area to create your template.



✪ The HTML Editor makes it easy to create and format your template. You can enter the text in the window and then format it using the toolbar buttons. You can change the font, font size and color, and background color. You can also insert images, hyperlinks, and tables.



8. Enter and format your message.

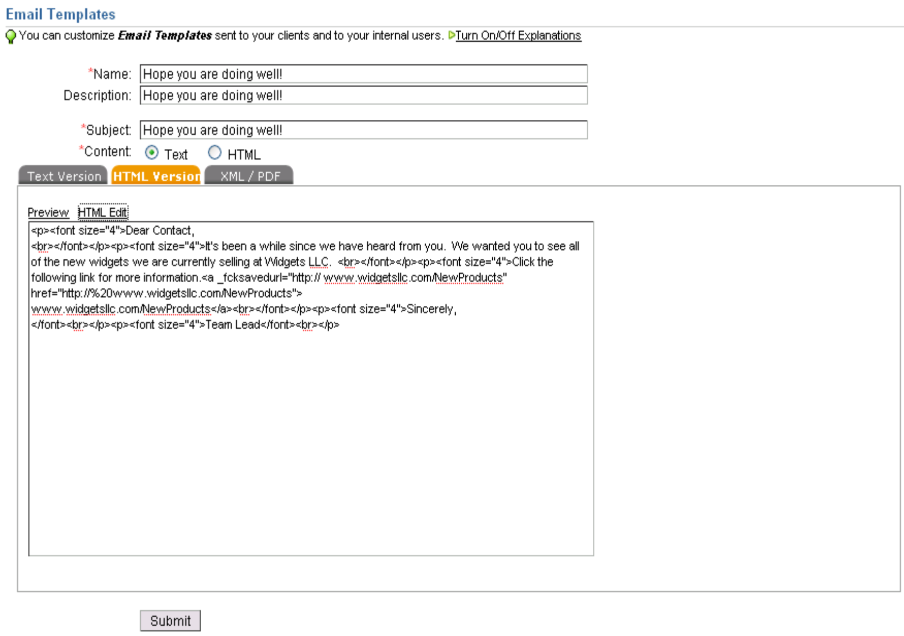
- To change the format of the message text, highlight the text and then click on the appropriate formatting button on the HTML toolbar.

- If you need to insert a mail merge field in your template, you can type the **## code** for the field in the **HTML Editor** window. However, if you don't know the field codes, it is easier to wait until you return to the **Email Templates** page to enter mail merge fields. While you are working in the **HTML Editor**, you can insert a placeholder for the merge field and then replace the placeholder with the actual field when you return to the **Email Templates** page. For example, if you want to input the contact **First Name** field, insert the placeholder **[First Name]**.

- To enter a web page hyperlink in your template, move to the location in the message where you want to insert the hyperlink and click on the **Insert/Edit Link** button. PlanPlus Online displays the **Link** dialog box. Make sure **URL** is selected from the **Link Type** drop-down menu. Select the protocol from the **Protocol** drop-down menu and type the URL in the **URL** field. Click on **OK**. PlanPlus Online adds the hyperlink to the template.

9. When you are finished creating the template, click on the **OK** button.

   PlanPlus Online returns to the **Email Templates** page and displays the message in HTML format.



10. To insert a mail merge field, click in the body of the message where you want to insert the field and then click on the **Add** link next to the field you want to insert.

    - If you inserted a placeholder for the field in the text, select the entire placeholder before clicking on the **Add** link. PlanPlus Online replaces the placeholder text with the field code.

11. When you have finished your template, click on the **Preview** link to review the template and check for errors.

    PlanPlus Online displays the preview of the message.

    Dear ##EF_FIRSTNAME## ,

    It's been a while since we have heard from you. We wanted you to see all of the new widgets we are currently selling at Widgets LLC.

    Click the following link for more information. www.widgetsllc.com/NewProducts

    Sincerely,

    ##EF_AGENT##

12. When you are finished previewing the message, click on the **Close** button.

    PlanPlus Online returns to the **Email Templates** page.

13. Make changes to the message, if necessary.

14. When you are finished, click on the **Submit** button.

    PlanPlus Online displays the **Email Templates** page.

    Record Updated Succesfully.

    Email Templates

    You can customize ***Email Templates*** sent to your clients and to your internal users. Turn On/Off Explanations

    Contact

    - Please update your billing info: Generic Contact Tmplate: please customize.
    - Contact Generic Template 2: Generic Contact Tmplate: please customize.
    - Contact Generic Template 3: Generic Contact Tmplate: please customize.
    - Contact Generic Template 4: Generic Contact Tmplate: please customize.
    - Contact Generic Template 5: Generic Contact Tmplate: please customize.
    - Contact Generic Template 6: Generic Contact Tmplate: please customize.
    - Contact Generic Template 7: Generic Contact Tmplate: please customize.
    - Contact Generic Template 8: Generic Contact Tmplate: please customize.
    - Thank-You for your interest in our Widgets: Thank-You for your interest in our Widgets
    - Hope you are doing well!: Hope you are doing well!

    Create New | Advanced: Template Groups

✪ Accessing email templates and sending emails are covered in the Introduction to PlanPlus Online training course. For more information, visit **www.planplusonline.com/webinars**.

Lesson 2: Advanced Search

PlanPlus Online can store a lot of valuable information, but you need to be able to access that information quickly. That's why PlanPlus Online includes such robust search capabilities. You can perform the following types of searches in PlanPlus Online:

- Entire database – Using the **Search All** field that is available on most pages in the application, you can search your entire database for the criteria you enter.
- Specific application – Using the **Search by Application** (i.e. **Search Contacts, Search Organizations, Search Opportunities**, etc) field that is available in each application, you can search the chosen application for the criteria you enter.
- Advanced search – Using the **Advanced Search** feature, you can create custom searches that utilize more complex search criteria. Advanced searches are available in the Organization, Contact, Opportunity, and Calendar applications.

Understanding Conditional Operators

When you create an advanced search, you specify the criteria for which you want to search and the condition that you want the criteria to meet (for example, equal to). Criteria values can be character strings (i.e. words and phrases), numbers, or dates. You can search using a single criterion or many, and you can search for an exact value or a range of values. For example, you might want to find all records created on a certain date or all records created in the last 30 days. In order to define the criteria for an advanced search, you need to understand the conditional operators that PlanPlus Online uses to define the search criteria.

The following table explains the conditional operators you can use to define your search criteria:

Conditional Operator	Function
Equals	Searches for data that matches the criteria exactly.
Not Equals	Searches for data that does not match the criteria.
Contains	Searches for data that contains the criteria value. Unlike the **Equals** operator, the **Contains** operator does not require an exact match.
Does Not Contain	Searches for data that does not contain the criteria value.
Starts With	Searches for data that starts with the criteria value.
Ends With	Searches for data that ends with the criteria value.

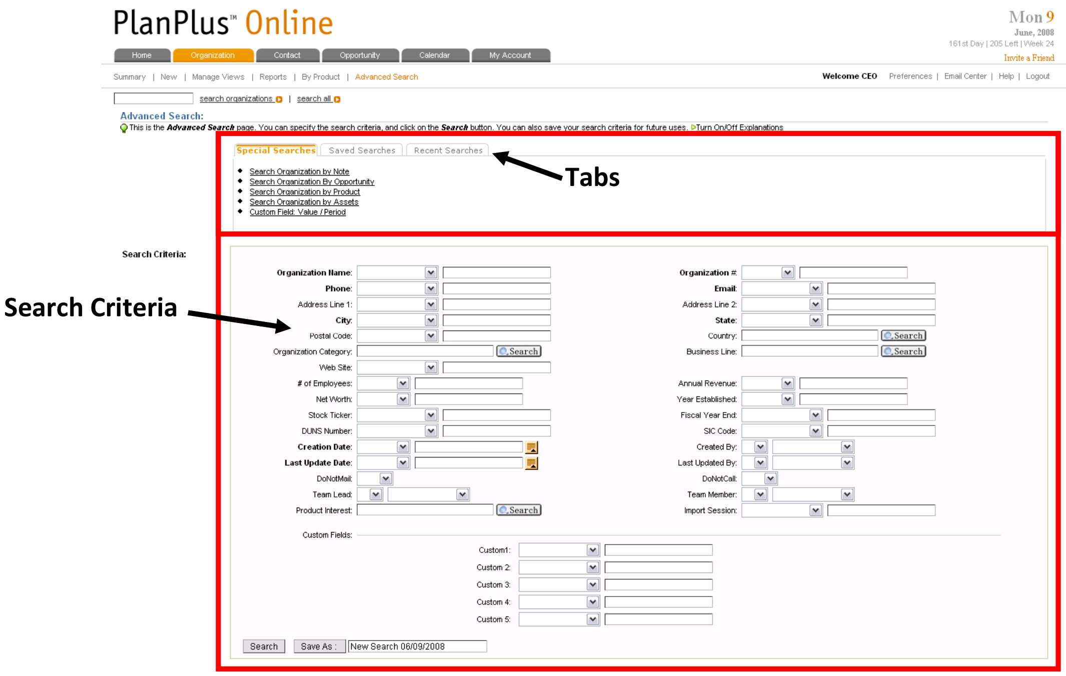
Conditional Operator	Function
=	This symbol represents the **Equals** operator.
!=	This symbol represents the **Not Equals** operator.
>	Searches for numeric data that is greater than the criteria value.
>=	Searches for numeric data that is greater than or equal to the criteria value.
<	Searches for numeric data that is less than the criteria value.
<=	Searches for numeric data that is less than or equal to the criteria value.
Between	Searches for data that falls between two dates or numbers.

Performing an Advanced Search

To perform an advanced search, use the following steps:

1. Access the application in which you want to perform your search. Click on **Advanced Search** in the Sub Menu as shown below**.**

PlanPlus Online displays the **Advanced Search** page.



- The **Advanced Search** page contains two areas: the tabbed area at the top of the page and the **Search Criteria** area at the bottom.

- The following table describes the **Special Searches**, **Saved Searches**, and **Recent Searches** tabs.

Tab	Function
Special Searches	Displays a list of default search templates, which make it easy to search for certain information.
Saved Searches	Displays all of the advanced searches you have completed and saved.
Recent Searches	Displays a list of your recent searches and allows you to re-submit them.

- The **Search Criteria** area contains every field in the current application along with an associated drop-down menu. For each field, you can specify the criteria for which you want to search and select the comparison operator you want to use from the drop-down menu. For example, if you want to search for all organizations in Atlanta, you would select the **Equals** operator from the drop-down menu for the **City** field and enter **Atlanta** in the field.

2. Define your search criteria using the fields and drop-down menus.

   - If a field contains a  button, you can click on the button to access a list of options for the field. If you want to select more than one option, press and hold the **CTRL** key as you click on each option. Make sure to also select an operator from the drop-down menu.

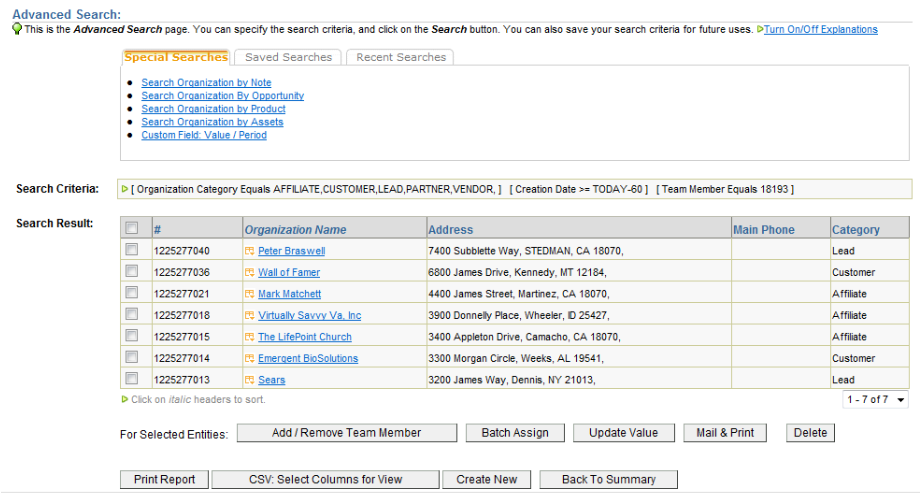
   - If a field contains a  button, you can click on the button to access a calendar from which you can select date criteria for the field. You can enter a single date in the field by selecting it from the calendar. To search for a range of dates, select the **Between** operator and then select the two dates from the calendars. You can also specify date criteria in terms of the current date plus or minus a set number of days. For example, you might want to run a search for anyone who has become a contact in the past 60 days. To do this, you would select the **>=** operator for the **Creation Date** field, click on the calendar icon, select the **Today** option, select either **+ (Days After)** or **– (Days After)** from the drop-down menu, and specify the number of days in the field. When you finish working in the **Date/Range Selector**, click on the **OK** button.

3. If you want to save the search, enter a name in the **Save As** field and click on the **Save As** button.

   - If you save the search, PlanPlus Online displays it on the **Saved Searches** tab. PlanPlus Online also displays searches you have run on the **Recent Searches** tab, which will hold a limited number of searches until they are forced off the list by new searches.

4. When you are finished, click on the **Search** button.

   PlanPlus Online executes the search and displays the results.



- The **Advanced Search** results page is interactive, which means you can click on an entity (organization, contact, opportunity, or calendar entry) in the **Search Result** area to open the associated detail page. You can also edit multiple entities at the same time using the buttons in the **Search Result** area. The following table describes the options.

Button	Function
Add/Remove Team Member	Allows you to add or remove users from the sales/support team for the contact, organization, or opportunity.
Batch Assign	Allows you to assign a user to a contact, organization, or opportunity as a team member, team lead, or as the exclusive user for the record.
Update Value	Allows you to update the values of certain fields for the contact, organization, opportunity, or calendar entry.
Attach Sales Process	Allows you to attach a sales process to an opportunity or a group of opportunities in the search results.
Mark for Sync	Allows you to specify that you want to include the contact in synchronizations with Microsoft Outlook. By default, PlanPlus Online includes only your private contacts in an Outlook synchronization.
Mail & Print	Allows you to select a template and send an email to the selected contact(s), organization(s), or opportunities. You can also print hard copies of templates for mailing.
Delete	Allows you to delete a contact, organization, opportunity, or calendar entry from the database.
Convert To Timesheet	This is a future feature - Coming soon.
Create New	Create a New Entity
CSV Select Columns For View	Allows you to Select the columns to view and export in your CSV file.

- Some of these options are only available for certain types of entities.

- To edit an entity, select the check box in front of the entity and click on the appropriate button. You can update more than one entity at a time by selecting the check box for each entity you want to update.

- To access a saved search, click on **Advanced Search** and then click on the **Saved Searches** tab. PlanPlus Online displays all of the searches you have saved. To rerun a saved search, click on its link and then click on the **Search** button.

Lesson 3: Contact Lists

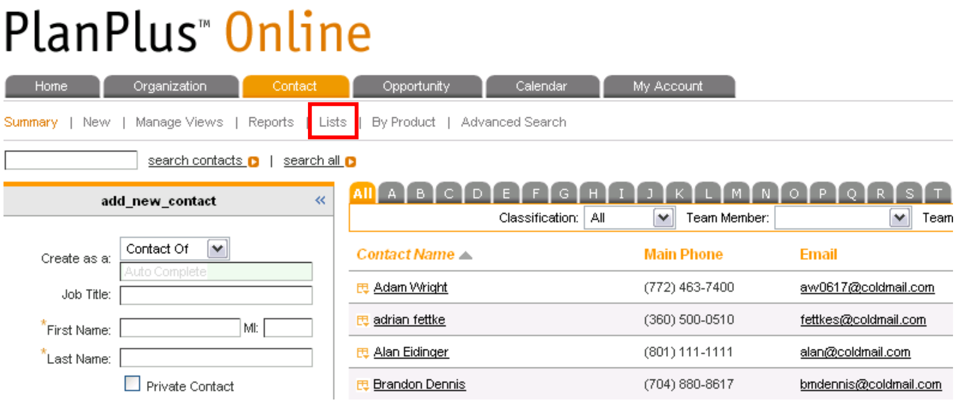
PlanPlus Online gives you the ability to create Contact Lists. A Contact List is interactive, which means you can open, edit, and delete contact records from the list view. You can also update records from the list view just as you can from the search results of an advanced search. Contact Lists are static lists, which mean they do not change and they are not based on criteria or the results of a search. You can use Contact Lists to create mailing lists, which allow you to send emails to a group of people quickly.

Creating Contact Lists

To create a Contact List, use the following steps:

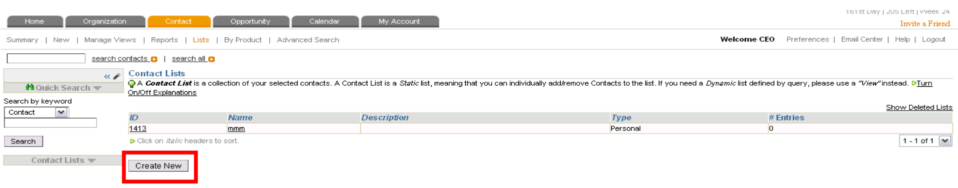
1. Select the **Contact** tab.

   PlanPlus Online displays the **Contact** Home page.



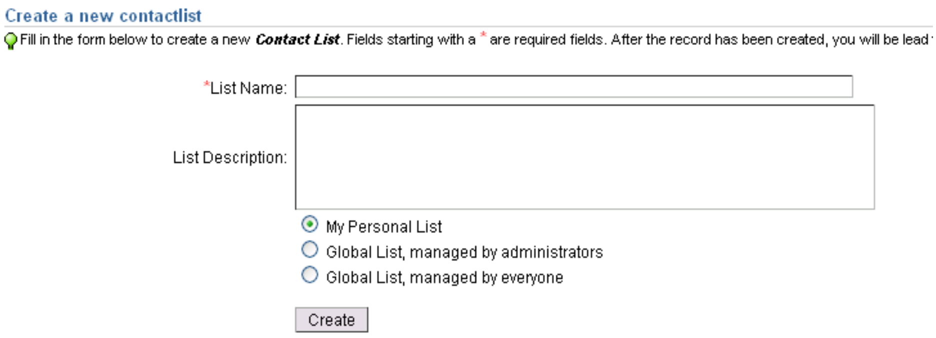
2. Click on **Lists** in the Sub Menu.

   PlanPlus Online displays the **Contact Lists** page.



3. Click on the **Create New** button.

PlanPlus Online displays the **Create a new contact list** page.

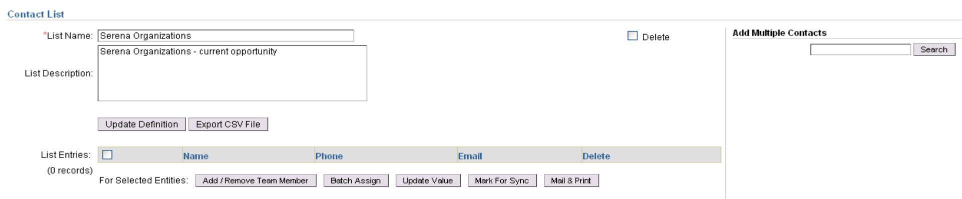


4. Enter a **List Name** and **List Description**.

5. Click on one of the following list types:
   - Click on the **My Personal List** option if this is a list for your use only.
   - Click on the **Global List, managed by administrators** option if this is a list for all users that will be managed by the administrator.
   - Click on the **Global List, managed by everyone** option if this is a list for all users that can be managed by anyone.

6. Click on the **Create** button.

   PlanPlus Online displays the **Contact List** page.



7. To add contacts to your list, click on the **Search** button for the **Add Multiple Contacts** field.

   PlanPlus Online displays a list of your contacts.

8. Select the check box before the name of each contact you want to add to the Contact List.

9. When you are finished, scroll to the bottom of the list and click on the **Add** button.

   PlanPlus Online adds the contacts you selected to your Contact List.

- You can also add contacts to a list by running an advanced search, selecting the check box in the top-left corner of the **Search Result**, and clicking on the **Add To List** button at the bottom of the page. The **Add To List** button will only appear if you have previously created a Contact List.

- The **Contact List** page contains the following option buttons:

Button	Function
Update Definition	Updates any changes you have made to the **Contact List** page.
Export CSV File	Creates a .CSV file with all of the selected contacts' information.
Add/Remove Team Member	Allows you to add or remove users from the sales/support team for the contact.
Batch Assign	Allows you to assign a user to a contact as a team member, team lead, or as the exclusive user for the record.
Update Value	Allows you to update the values of certain fields for the contact.
Mark For Sync	Allows you to specify that you want to include the contact in synchronizations with Microsoft Outlook. By default, PlanPlus Online includes only your private contacts in an Outlook synchronization.
Mail & Print	Allows you to select a template and send an email to the selected contacts. You can also print hard copies of templates for mailing.

- To edit a contact, select the check box in front of the contact's name and click on the appropriate button. You can update more than one contact at a time by selecting the check box for each contact you want to update.

- If you want to delete a contact from the Contact List, click on the **X** link in the **Delete** column.

Unit Performance Lab

Perfecting Your Skills

In this unit, you learned how to create email templates and how to run and save an advanced search. You also created a Contact List. In this performance lab, you will create an email template, run an advanced search, and save the results as a list. Then you will send out an email using the new template.

1. Create an HTML email template in the Contact application with the following information:

   Name, Description, and Subject – Thank-you for your response to our survey!

   Dear (**Contact Name)**,

   We want to thank-you for your recent response to our survey.

   For more information on our new product line, visit our website by clicking HERE. *(Imbed this link behind the word "HERE" www.widgetsllc.com/newproducts.)*

   We look forward to doing business with you in the future.

   Sincerely,

   (User Name)

   (User Email)

   (User Phone)

2. Create a Personal Contact List named **New Contacts - Last 30 Days**. Save it as a **Personal List**.

3. Run an advanced search in the Contact application using the following criteria and save it under the name **New Clients Very Interested.**

   Include all clients created in the past month (30 days). (Hint: Between (**TODAY-30**)

   Clients must have an email address. (Hint – Email addresses must contain an @ symbol)

   Interest Level must be **Very Interested.**

4. Place all of your search results (New Clients Very Interested) into the New Contacts - Last 30 Days list.

5. Manually add the contact Elvis Presley to the **New Contacts - Last 30 Days** list.

6. Send an email to the clients in the **New Contacts -Last 30 Days** list using the newly created email template.

Applying Your Knowledge

1. What are the steps in sending an email to the results of a saved search?
2. What are the differences between the following: Advanced Search, Search All, and Search for Contacts?
3. Explain the two different types of email templates you can create with PlanPlus Online.

Performance Lab Answers

The Instructor will review the answers with the entire group.

Applying Your Knowledge

1. Open the saved search by clicking on **Advanced Search** in the application.
   Click on the **Saved Searches** tab.
   Open the saved search by clicking on its link.
   Scroll to the bottom and click on the **Search** button.
   Select the check boxes for the records you want to include in the email.
   Click on the **Mail & Print** button.
   Review the recipients and click on the **Send Emails** button.
   Click on the template you want to use for the message.
   Review the outgoing emails and click on the **Submit** button.
2. Advanced **Search** – Allows you to run searches based on multiple criteria and narrow your search results to exactly what you are searching for.

   Search All – Searches the entire database for a criteria match.

   Search Contacts (Application) – Searches the selected application for a criteria match.
3. Plain Text – Plain Text emails contain only basic text with no formatting or special features.

   HTML – Allows you to use an HTML toolbar to create and format the email template to your specifications. You can add many different options such as font formatting, hyperlinks, tables, and images.

Unit 6: Process Builder

Unit Objectives:

- Understand business processes.
- Configure process action templates for the action items in your process.
- Create processes and attach possible results and action items to each process.
- Attach processes to opportunities.

Lesson 1: Understanding Processes

Every business uses processes. Whether you are a sales organization, a widget company, a manufacturing plant, a real estate company, or a medical practice, you have processes in place to help you track certain information, complete important activities, and increase efficiencies. Some people are not even aware of these processes, but they definitely exist, and they help determine your level of success as a business. Below is an outline of a typical process in a sales organization.

WIDGETS LLC SALES PROCESS

Step 1. **Qualify the Lead**
Step 2. **Determine Needs**
Step 3. **Review Quote**
Step 4. **Negotiate Deal**
Step 5. **Contract Signed**
Step 6. **Receive Monies**
Step 7. **Dead File**
Step 8. **On Hold**
Step 9. **Closed Won**

Possible Results

In a perfect world, the above steps would represent the flow of every client through a sales process. However, we all know that there are always hiccups and problems that arise throughout a process. What happens if the client decides not to buy? What happens if they need to postpone a purchase? What if they sign the contract and never pay their bill? We call these scenarios “possible results”. It is important to incorporate possible results into our process. The following is an example of a process containing possible results.

WIDGETS LLC SALES PROCESS

Step 1. **Qualify the Lead**
Possible Result - Determine Needs Step 2
Possible Result - Dead File Step 7
Step 2. **Determine Needs**
Possible Result - Review Quote Step 3
Possible Result - Dead File Step 7
Possible Result - On Hold Step 8
Step 3. **Review Quote**
Possible Result - Negotiate Deal Step 4
Possible Result - Dead File Step 7
Possible Result - On Hold Step 8
Step 4. **Negotiate Deal**
Possible Result - Review Quote Step 3
Possible Result - Contract Signed Step 5

Possible Result - Dead File Step 7
Possible Result - On Hold Step 8

Step 5. **Contract Signed**
Possible Result - Receive Monies Step 6
Possible Result - Dead File Step 7
Possible Result - On Hold Step 8

Step 6. **Receive Monies**
Possible Result - On Hold Step 8
Possible Result - Closed Won Step 9

Step 7. **Dead File**
Possible Result – No Result/Final Step

Step 8. **On Hold**
Possible Result - Determine Needs Step 2
Possible Result - Review Quote Step 3
Possible Result - Negotiate Deal Step 4
Possible Result - Contract Signed Step 5
Possible Result - Receive Monies Step 6
Possible Result - Dead File Step 7

Step 9. **Closed Won**
Possible Result – No Result/Final Step

Action Items

In addition to possible results, there are also action items you can incorporate into your process. Action items include things like creating a quote, creating the contract, getting your manager to review the contract, negotiating the deal with the client, collecting funds, making phone calls, etc. You can configure your process to launch specific actions upon the completion of certain steps. For example, PlanPlus Online can add a task to the task list of the user you choose to delegate a particular task to. You can also use auto-generated notes, emails to your client, and appointments to incorporate action items into your process. The following is an example of a process with action items.

WIDGETS LLC SALES PROCESS

Step 1. **Qualify the Lead**
Action - Automatic Thank-You Email to Client
Possible Result - Determine Needs Step 2
Possible Result - Dead File Step 7

Step 2. **Determine Needs**
Action - Task - Prepare Quote
Possible Result - Review Quote Step 3
Possible Result - Dead File Step 7
Possible Result - On Hold Step 8

Step 3. **Review Quote**
Action - Appointment - Review Quote with Manager
Possible Result - Negotiate Deal Step 4
Possible Result - Dead File Step 7

Possible Result - On Hold Step 8

Step 4. **Negotiate Deal**

Action - Task - Send Contract to Client
Possible Result - Review Quote Step 3
Possible Result - Contract Signed Step 5
Possible Result - Dead File Step 7
Possible Result - On Hold Step 8

Step 5. **Contract Signed**

Action - Task - Send Wiring Instructions
Possible Result - Receive Monies Step 6
Possible Result - Dead File Step 7
Possible Result - On Hold Step 8

Step 6. **Receive Monies**

Possible Result - On Hold Step 8
Possible Result - Closed Won Step 9

Step 7. **Dead File**

Possible Result - No Result/Final Step

Step 8. **On Hold**

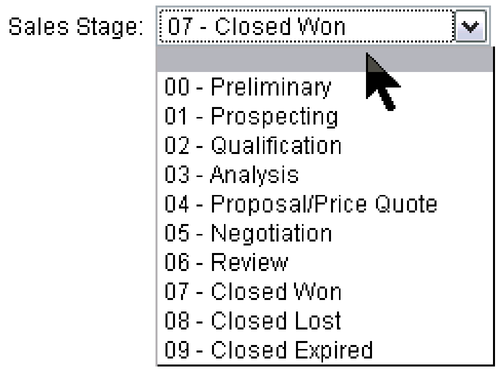
Possible Result - Determine Needs Step 2
Possible Result - Review Quote Step 3
Possible Result - Negotiate Deal Step 4
Possible Result - Contract Signed Step 5
Possible Result - Receive Monies Step 6
Possible Result - Dead File Step 7

Step 9. **Closed Won**

Possible Result – No Result/Final Step

Automatic Field Updates

In addition to incorporating possible results and action items, you can also automatically update fields as each step in the process is completed so that your reports are a true representation of what is happening in your business. PlanPlus Online includes a field called **Sales Stage**, which you can update as each step in the process is completed.



Other examples of fields you might want to update are **Interest Level**, **Products Interested In**, **Win Probability**, and **Forecasted Close Date**. The following is an example of a process with automatically updated fields.

WIDGETS LLC SALES PROCESS

Step 1. **Qualify the Lead**
Action – Update Field Value – Sales Stage - Qualification
Action - Automatic Thank-You Email to Client
Possible Result - Determine Needs Step 2
Possible Result - Dead File Step 7

Step 2. **Determine Needs**
Action – Update Field Value – Sales Stage - Analysis
Action - Task - Prepare Quote
Possible Result - Review Quote Step 3
Possible Result - Dead File Step 7
Possible Result - On Hold Step 8

Step 3. **Review Quote**
Action – Update Field Value – Sales Stage – Proposal/PQ
Action - Appointment - Review Quote with Manager
Possible Result - Negotiate Deal Step 4
Possible Result - Dead File Step 7
Possible Result - On Hold Step 8

Step 4. **Negotiate Deal**
Action – Update Field Value – Sales Stage - Negotiation
Action - Task - Send Contract to Client
Possible Result - Review Quote Step 3

Possible Result - Contract Signed Step 5
Possible Result - Dead File Step 7
Possible Result - On Hold Step 8

Step 5. **Contract Signed**
Action – Update Field Value – Sales Stage - Review
Action - Task - Send Wiring Instructions
Possible Result - Receive Monies Step 6
Possible Result - Dead File Step 7
Possible Result - On Hold Step 8

Step 6. **Receive Monies**
Possible Result - On Hold Step 8
Possible Result - Closed Won Step 9

Step 7. **Dead File**
Action – Update Field Value – Sales Stage – Closed Lost
Possible Result - No Result/Final Step

Step 8. **On Hold**
Possible Result - Determine Needs Step 2
Possible Result - Review Quote Step 3
Possible Result - Negotiate Deal Step 4
Possible Result - Contract Signed Step 5
Possible Result - Receive Monies Step 6
Possible Result - Dead File Step 7

Step 9. **Closed Won**
Action – Update Field Value – Sales Stage – Closed Won
Possible Result – No Result/Final Step

- ✪ In addition to incorporating possible results, action items, and automatic field updates, you can also assign the individual process steps to specific users in your organization. You can even automatically advance steps in your process, if necessary.

- ✪ In the next lesson, we will teach you how to create process action templates for each of your action items. Process action templates define the actions you want PlanPlus Online to take for each action item.

Lesson 2: Configuring Process Action Templates

Action items have the potential to increase your efficiency and effectiveness by automatically directing you and others to the next step that needs to be completed in a process. Once you have outlined your process on paper, but before you begin creating it in the **Process Builder** application, you should create process action templates for each of your action items to define the steps that PlanPlus Online should execute for each action item. For example, you can schedule tasks or appointments, create notes, and send emails to assist in completing each action item. Once you create the process action templates, you can create the process and add the action items to your process at the appropriate step.

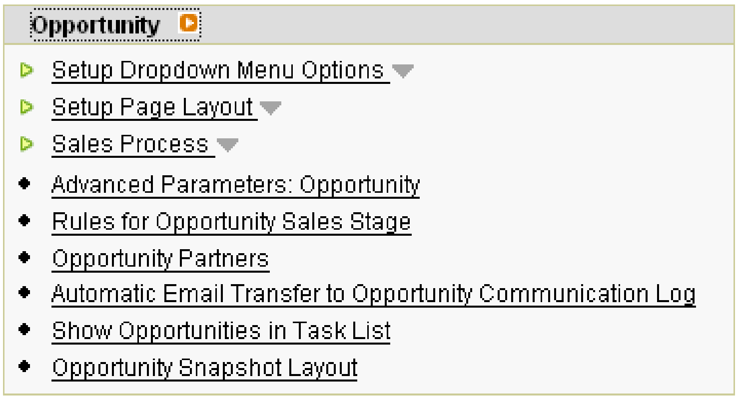
To create a process action template, use the following steps:

1. Click on the **My Account** tab.

   PlanPlus Online displays the **My Account** page.

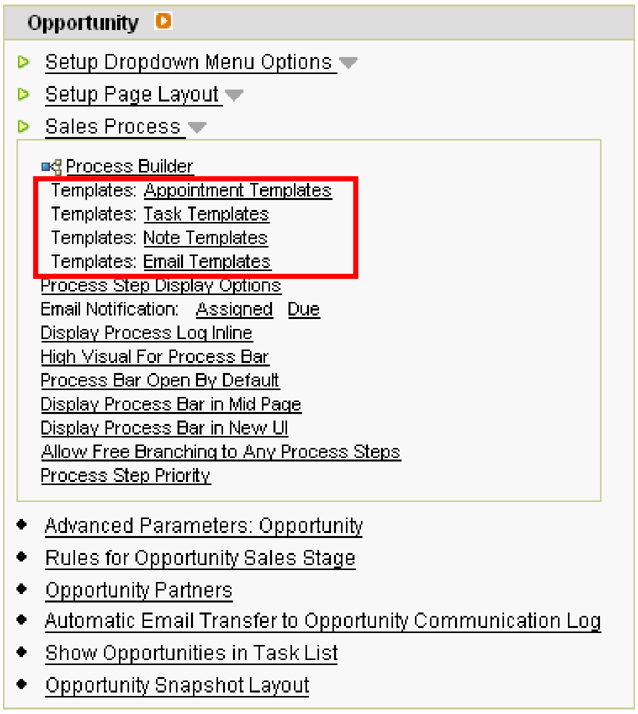
2. Click on the **Opportunity** heading.

   PlanPlus Online displays the **Opportunity** section menu.



3. Click on the **Sales Process** link.

PlanPlus Online displays the **Sales Process** options.



4. Click on the link for the process action template type you want to create.

   PlanPlus Online displays the **Process Builder: Templates** page for the selected template type.

5. Click on the **Create New** button.

   PlanPlus Online displays **Update Template** page for selected template type. The following screen is the **Update Task Template** page.

- The fields that display on the **Update Template** page depend on the type of template you are creating. All template types have a **Template Name** field.

6. Enter the **Template Name** for the new template.

7. Enter the necessary information for the template type you are creating.

- The following table describes the fields you must define for each template type.

Template Type	Field Definitions
Appointment	To create an Appointment template, you must specify the appointment **Name**, **Start Date**, **Start Time**, **Type**, **Assign To**, **Duration**, **Importance**, and **Description**.
Task	To create a Task template, you must specify the task **Description**, **Due Date**, **Priority**, **Status**, **Owner**, and **Detail**.
Note	To create a Note template, you must specify the note **Subject** and **Content**.
Email	To create an Email template, you must specify the email **Subject** and **Content**. Refer to Unit 5: Email Templates, Advanced Search, and Lists for more information on creating email templates.

8. When you are finished, click on the **Update Template** button.

   PlanPlus Online saves your information and returns you to the **Process Builder: Templates** page and displays the new template you created in the list.

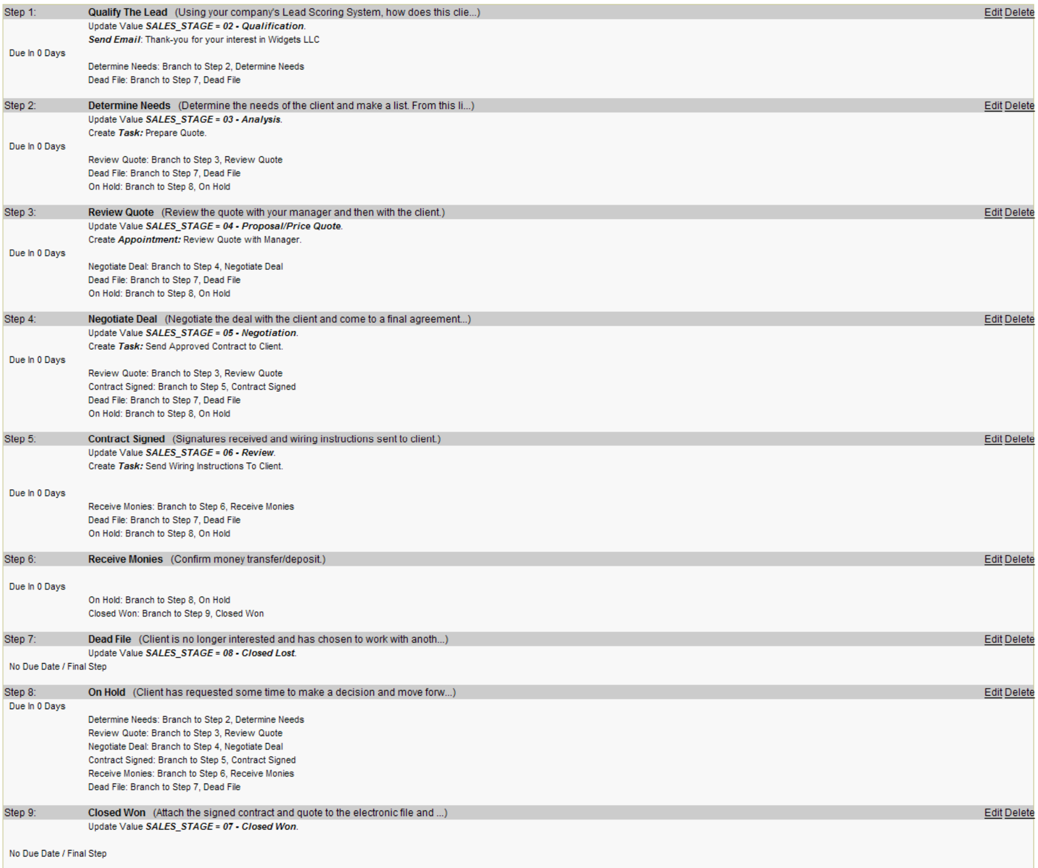
- To edit a template, click on its link on the **Process Builder: Templates** page.

- After you create a template, you will be able to select it in the **Process Builder** application when you are creating action items.

Lesson 3: Creating a Process

Creating a process can take some time, but it is definitely worth the investment. Once you have created your process, you will find that you save time in the future and ensure that clients and opportunities are not overlooked. This lesson will teach you how to create a process for your business in the **Process Builder** application, which was designed to help you stay on top of your processes and never let anything fall through the cracks without your knowledge. Prior to beginning your process, we recommend that you take some time and define your process on paper with the other members of your organization. You can start with a "high level" outline, and then add in your possible results, action items, and finally your automatic field updates, much as we did in Lesson 1.

The following is an example of a process that was created in the **Process Builder** application:



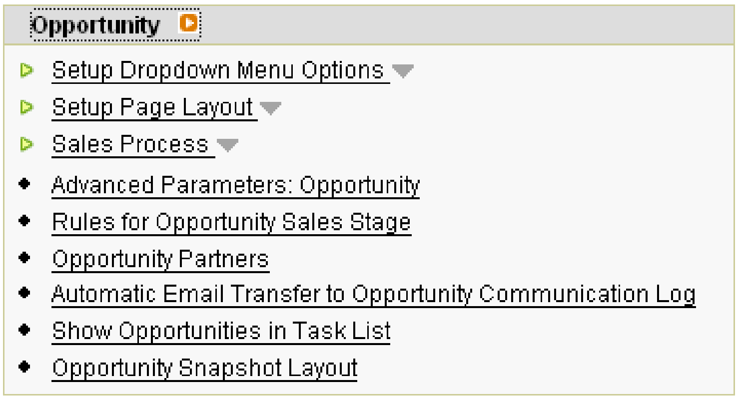
To create a process, use the following steps:

1. Click on the **My Account** tab.

   PlanPlus Online displays the **My Account** page.

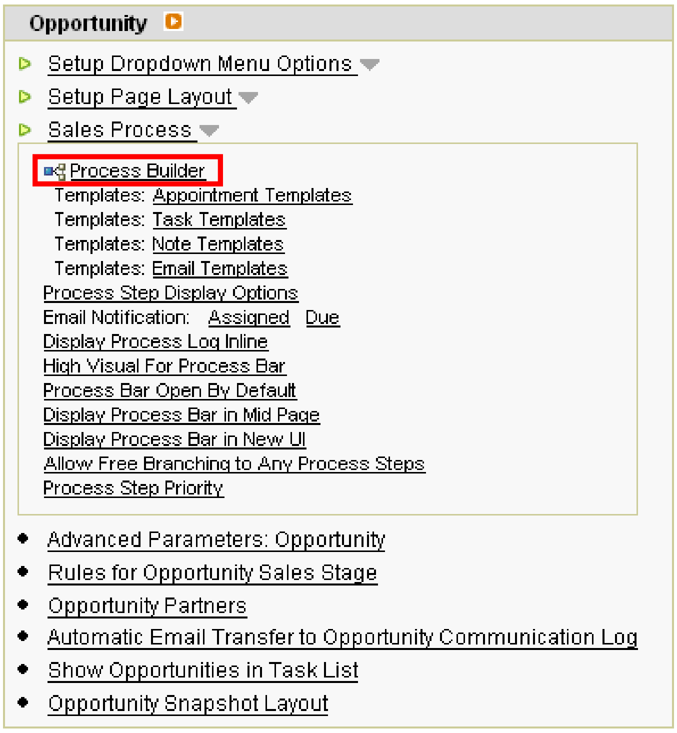
2. Click on the **Opportunity** heading.

   PlanPlus Online displays the **Opportunity** section menu.



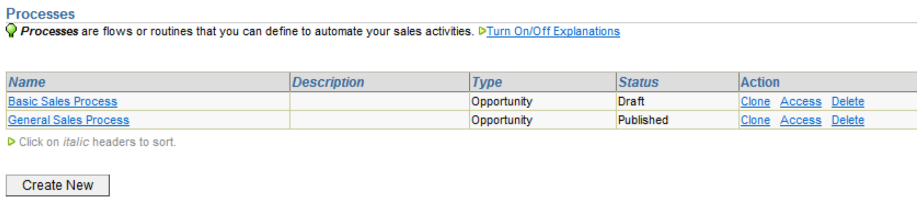
3. Click on the **Sales Process** link.

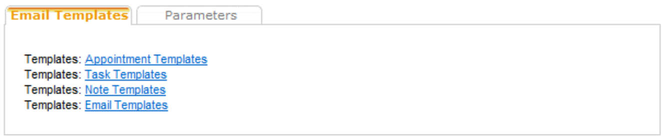
   PlanPlus Online displays the **Sales Process** options.



4. Click on the **Process Builder** link.

PlanPlus Online displays the **Processes** page.

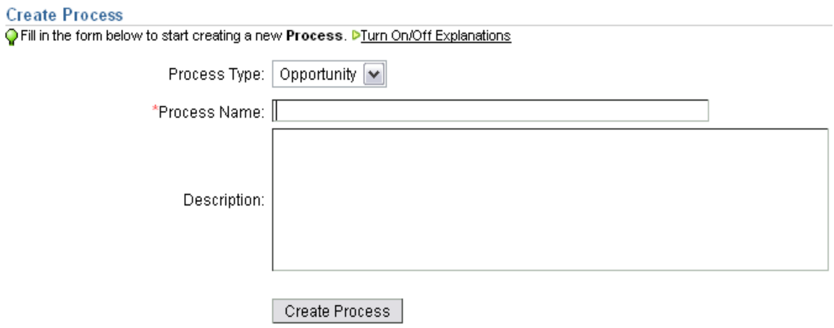




✪ This is the page where PlanPlus Online displays all of the processes that you have defined. There are also two default processes - Basic Sales Process and General Sales Process - that you can modify or use as the basis for a new process.

5. Click on the **Create New** button.

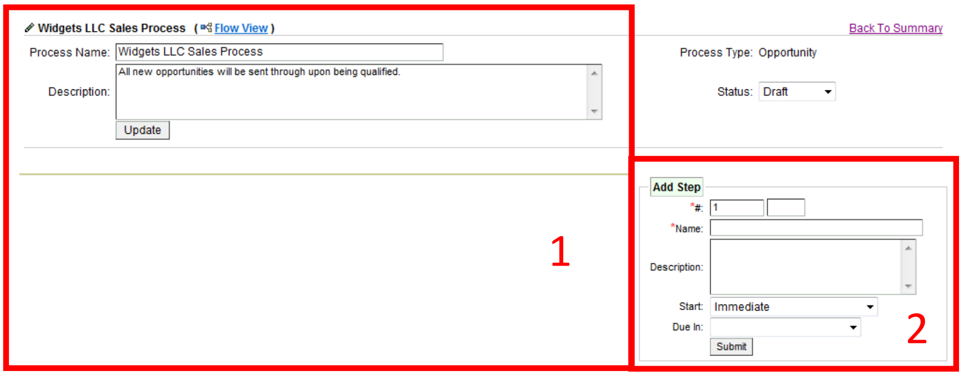
   PlanPlus Online displays the **Create Process** page.



6. Enter the **Process Name** and **Description**.

7. When you are finished, click on the **Create Process** button.

PlanPlus Online displays the **Edit Process** page for the new process.

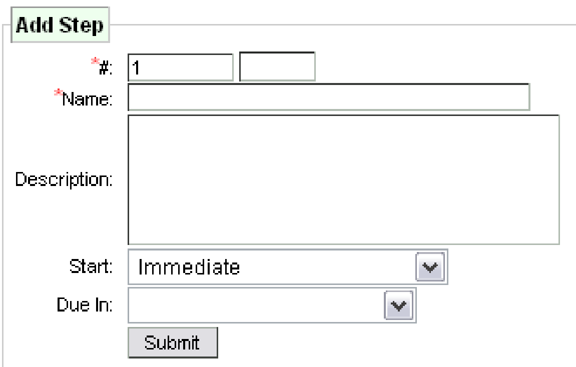


- This page is divided into two sections. Section 1 displays the process name and description and the steps you have added to the process. Section 2 is where you create the process steps.

Adding Steps to a Process

You add steps to a process using the **Add Step** section of the **Edit Process** page.

The following is a close-up view of the **Add Step** section.



The following table describes the fields in the **Add Step** section.

Field	Function
#	This is the step number. If the step is a sub-step of another step, the number might be 1A or 1B.
Name	This is the name of the process step, for example, **Qualify the Lead**.
Description	Describes what happens during this step of the process.

Field	Function
Start	Defines when this process step should begin. Your choices are **Immediate** for steps that should start immediately or **Branched from another step** for steps that should start based on the results of a previous step**.**
Due In	Indicates the number of days until the step has to be completed.

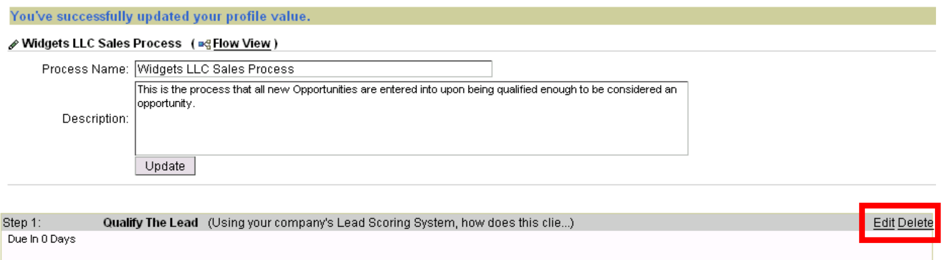
✪ If the step is a final step such as Closed Won or Dead Filed, scroll to the bottom of the **Due In** drop-down menu and choose **No Due Date/Final Step.**

To add steps to a process, use the following steps:

1. Define the information for the step using the fields in the **Add Step** section.

2. When you are finished, click on the **Submit** button.

   PlanPlus Online refreshes the page and adds the new step to the process you are building.



✪ The **Flow View** link displays your process as a flow chart, which can make it easier to visualize branching steps.

✪ If you make a change to either the **Process Name** or **Description**, click on the **Update** button.

3. Repeat steps 1-2 to define all of your remaining process steps.

✪ To edit a step, click on its **Edit** link as shown above. To delete a step, click on its **Delete** link. PlanPlus Online displays a confirmation message. Click on the **Yes, Delete** link.

🛠 ***Activity – Use the data in the following table to create the remaining steps for the process.***

Step #	Name	Description	Start	Due In
2	**Determine Needs**	Determine the needs of the client and make a list. From this list you will form a proposal/Quote.	Branched From Another Step	0 Days
3	**Review Quote**	Review the quote with your manager and then with the client.	Branched From Another Step	0 Days
4	**Negotiate Deal**	Negotiate the deal with the client and come to a final agreement. Draft a contract.	Branched From Another Step	0 Days
5	**Contract Signed**	Signatures received and wiring instructions sent to client.	Branched From Another Step	0 Days
6	**Receive Monies**	Confirm money transfer/deposit.	Branched From Another Step	0 Days
7	**Dead File**	Client is no longer interested and has chosen to work with another company or not to purchase at all.	Branched From Another Step	No Due Date / Final Step
8	**On Hold**	Client has requested some time to make a decision and move forward.	Branched From Another Step	0 Days
9	**Closed Won**	Attach the signed contract and quote to the electronic file and update the file to Closed Won.	Branched From Another Step	No Due Date / Final Step

When you are finished with the activity, your **Edit Process** page should look similar to the following.

Step 1: Due In 0 Days	**Qualify The Lead** (Using your company's Lead Scoring System, how does this clie...)	Edit Delete
Step 2: Due In 0 Days	**Determine Needs** (Determine the needs of the client and make a list. From this li...)	Edit Delete
Step 3: Due In 0 Days	**Review Quote** (Review the quote with your manager and then with the client.)	Edit Delete
Step 4: Due In 0 Days	**Negotiate Deal** (Negotiate the deal with the client and come to a final agreement...)	Edit Delete
Step 5: Due In 0 Days	**Contract Signed** (Signatures received and wiring instructions sent to client.)	Edit Delete
Step 6: Due In 0 Days	**Receive Monies** (Confirm money transfer/deposit.)	Edit Delete
Step 7: Due In 0 Days	**Dead File** (Client is no longer interested and has chosen to work with anoth...)	Edit Delete
Step 8: Due In 0 Days	**On Hold** (Client has requested some time to make a decision and move forw...)	Edit Delete
Step 9: Due In 0 Days	**Closed Won** (Attach the signed contract and quote to the electronic file and ...)	Edit Delete

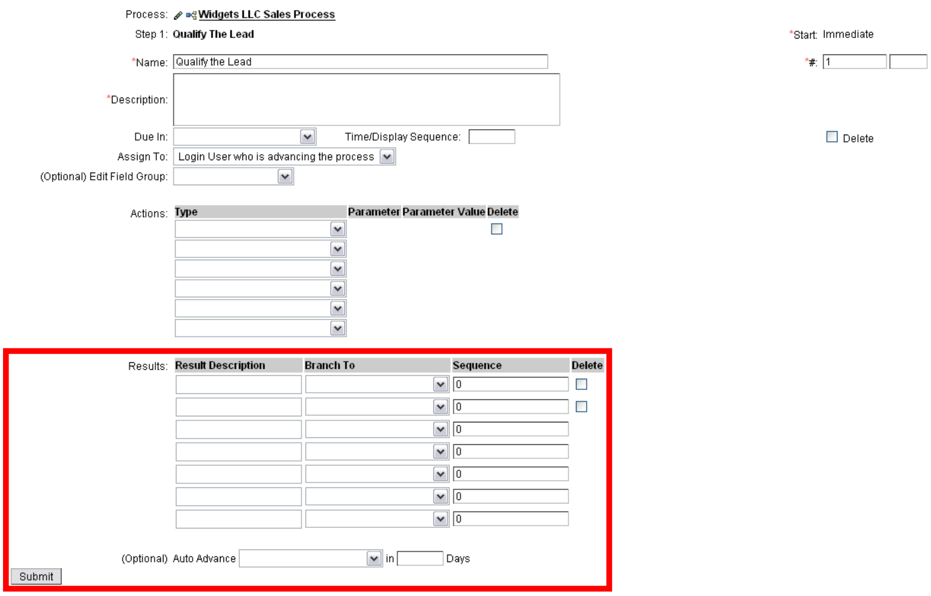
Adding Possible Results to a Process

When you have finished building your process steps, you can begin adding your possible results.

To add possible results to a process step, use the following steps:

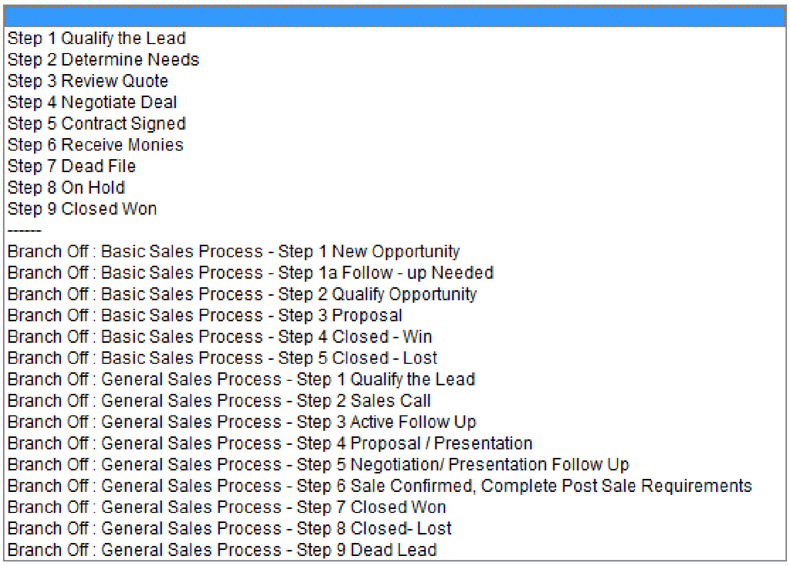
1. Click on the **Edit** link for the step for which you want to add a possible result.

   PlanPlus Online displays the **Edit Process Step** page.



2. Locate and click on the first empty **Result Description** field in the **Results** section and enter a description of the result.

3. Click on the **Branch To** drop-down menu for the result description and select the step to which you want to branch.



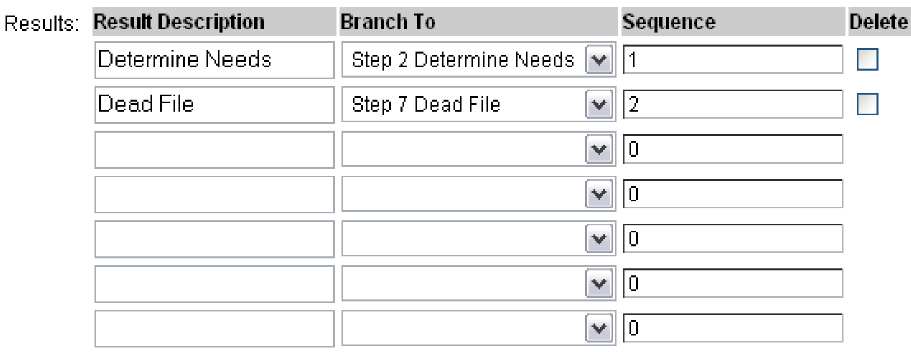
✪ When you click on the **Branch To** drop-down menu, PlanPlus Online displays the steps in the current process first followed by the steps in other published processes. You can branch from the current process to a step in another process by selecting it from the drop-down menu.

4. To control the order in which multiple results are listed in the process, specify a sequence number in the **Sequence** field.

5. Enter additional possible results for the step, if necessary.

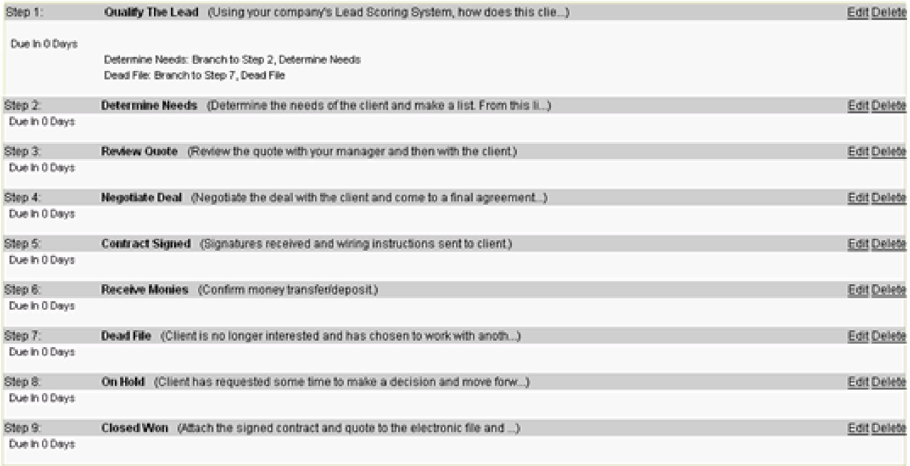
6. When you are finished, click on the **Submit** button.

   PlanPlus Online saves the changes and refreshes the page.



7. When you are finished entering all of the possible results for the step, click on the **Process** link (name of the process) at the top of the page.

PlanPlus Online returns to the **Edit Process** page.



8. Repeat steps # 1-7 to enter possible results for the remainder of your process steps.

   When you are finished, your **Edit Process** page will list all of the possible results beneath each step.

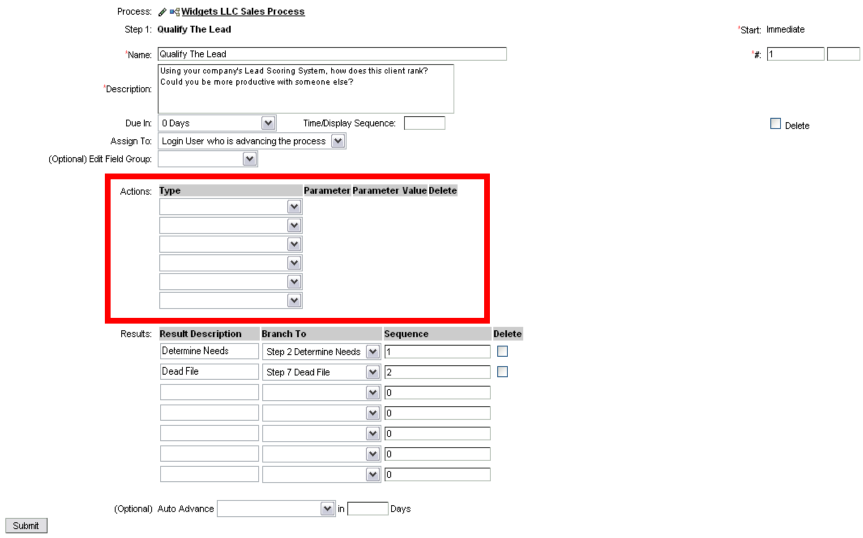
Adding Action Items to a Process

When you have finished adding your possible results to the process, you can begin adding your action items. Before you can add action items to a process, you must first create process action templates for each action item.

To add action items to a process, use the following steps:

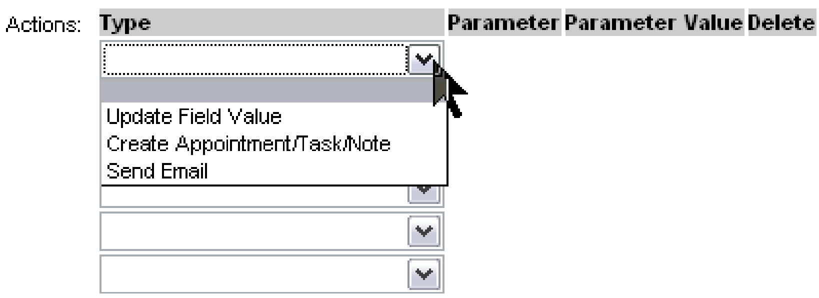
1. Click on the **Edit** link for the step for which you want to add an action item.

PlanPlus Online displays the **Edit Process Step** page.



2. Click on the drop-down menu for the first empty **Type** field in the **Actions** section.

   PlanPlus Online displays the **Action Type** drop-down menu.



The following table describes the options on the **Action Type** drop-down menu:

Option	Description
Update Field Value	Creates an action item that automatically updates the value in a particular field when the process is advanced. For example, you can change the **Sales Stage** from **Pending** to **Closed** when monies have been received.
Create Appointment/ Task/Note	Creates an action item that automatically creates an **Appointment, Task** or **Note** when the process is advanced. For example, you can add a task to the Salesperson's task list directing him or her to create a quote.

Option	Description
Send Email	Creates an action item that automatically sends an email when the process is advanced. For example, you can send an email to the CEO and client informing them when funds have been received.

3. Select the action type you want to create.

   PlanPlus Online activates the **Parameter** drop-down menu for the action item.

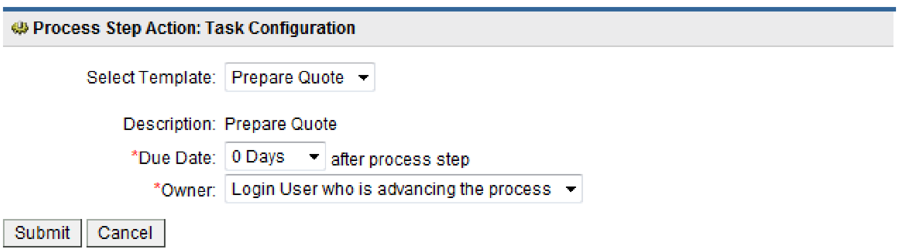
4. Click on the **Parameter** drop-down menu and select one of the following:

   - If you are creating an update field action item, select the field you want to update. Then click on the **Parameter Value** drop-down menu and select the value you want to assign to the field or click in the field and enter the value you want to assign to the field.
   - If you are creating an appointment, task, or note action item, select **Task**, **Appointment**, or **Note** from the drop-down menu.
   - If you are creating an email action item, select **Send Email Automatically** to have PlanPlus Online automatically send the email or select **User Confirm** if you want the user to confirm the email prior to sending it. Then click on the **Parameter Value** drop-down menu and select the email template you want to send.

5. When you are finished, click on the **Submit** button.

   PlanPlus Online saves the changes and refreshes the page.

✪ If you created an appointment, task, or note action item, PlanPlus Online adds a **Select Template** link to the action item after you click on the **Submit** button. Click on the link to display the **Process Step Action** page. Select the appointment, task, or note template that you want to assign to the task from the **Select Template** drop-down menu and click on the **Submit** button.



6. When you are finished with all of the action items for the process step, click on the process link (name of the process) at the top of the page.

   Process: Widgets LLC Sales Process

   PlanPlus Online displays the **Edit Process** page.

Step 1:	**Qualify the Lead** (Using the Lead Scoring System, how does this client rate?)	Edit Delete
Due In 0 Days	***Send Email***: Thank You for your interest in Widgets LLC Determine Needs: Branch to Step 2, Determine Needs Dead File: Branch to Step 7, Dead File	
Step 2:	**Determine Needs** (Determine the needs of the client and make a list.)	Edit Delete
Due In 0 Days		
Step 3:	**Review Quote** (Review the quote with your manager and then with the client.)	Edit Delete
Due In 0 Days		
Step 4:	**Negotiate Deal** (Negotiate the deal with the client and come to a final agreement...)	Edit Delete
Due In 0 Days		
Step 5:	**Contract Signed** (Signatures received and wiring instructions sent to client.)	Edit Delete
Due In 0 Days		
Step 6:	**Receive Monies** (Confirm money transfer/deposit.)	Edit Delete
Due In 0 Days		
Step 7:	**Dead File** (Client is no longer interested and has chosen to work with anoth...)	Edit Delete
No Due Date / Final Step		
Step 8:	**On Hold** (Client has requested some time to make a decision and move forw...)	Edit Delete
Due In 0 Days		
Step 9:	**Closed Won** (Attach the signed contract and quote to the electronic file and ...)	Edit Delete
No Due Date / Final Step		

7. Repeat steps # 1-7 to input action items for the remainder of the process steps.

   When you are finished, your **Edit Process** page will list all of the action items and possible results beneath each step.

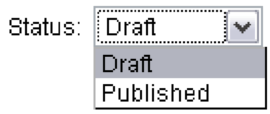
> ***Activity – Add a Task action item to step #2 using the Prepare Quote task template.***

Publishing a Process

When you are finished defining the steps, possible results, and action items for your process, you are ready to publish the process so the users in your organization can use it to track opportunities.

To publish a process, use the following steps:

1. From the **Edit Process** page, click on the **Status** drop-down menu and click on **Published**.



✪ The **Published** option saves the process as a global template that all users can access. If you are continuing to work on the process, leave the status as **Draft**.

2. Click on the **Update** button.

   PlanPlus Online saves your changes and refreshes the page.

3. Click on the **Back to Summary** link to return to the **Processes** page.

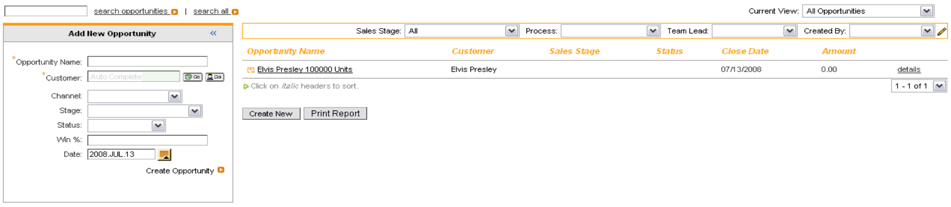
Lesson 4: Attaching Opportunities to a Process

Now that you have created a process in PlanPlus Online, you are ready to attach it to an opportunity and advance the opportunity through the process steps.

To attach a process to an opportunity, use the following steps.

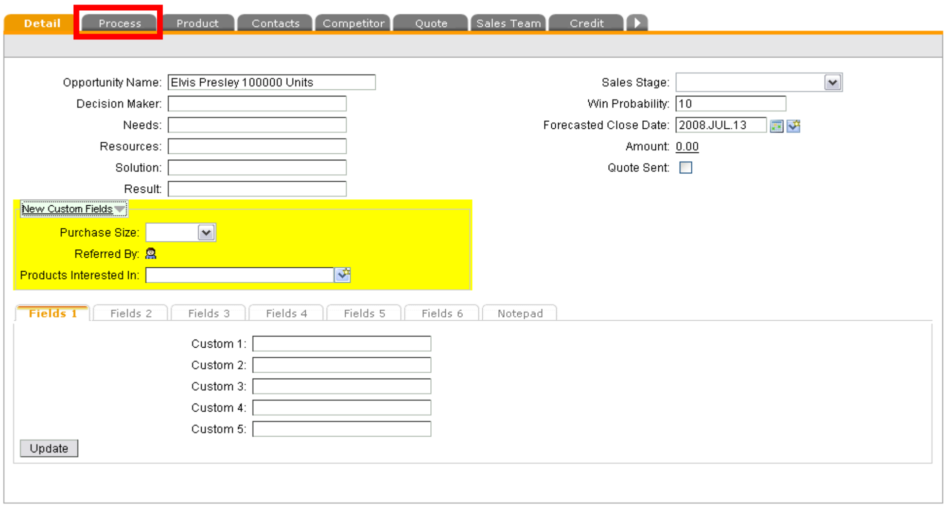
1. Click on the **Opportunity** tab.

   PlanPlus Online displays the **Opportunity** Home page.



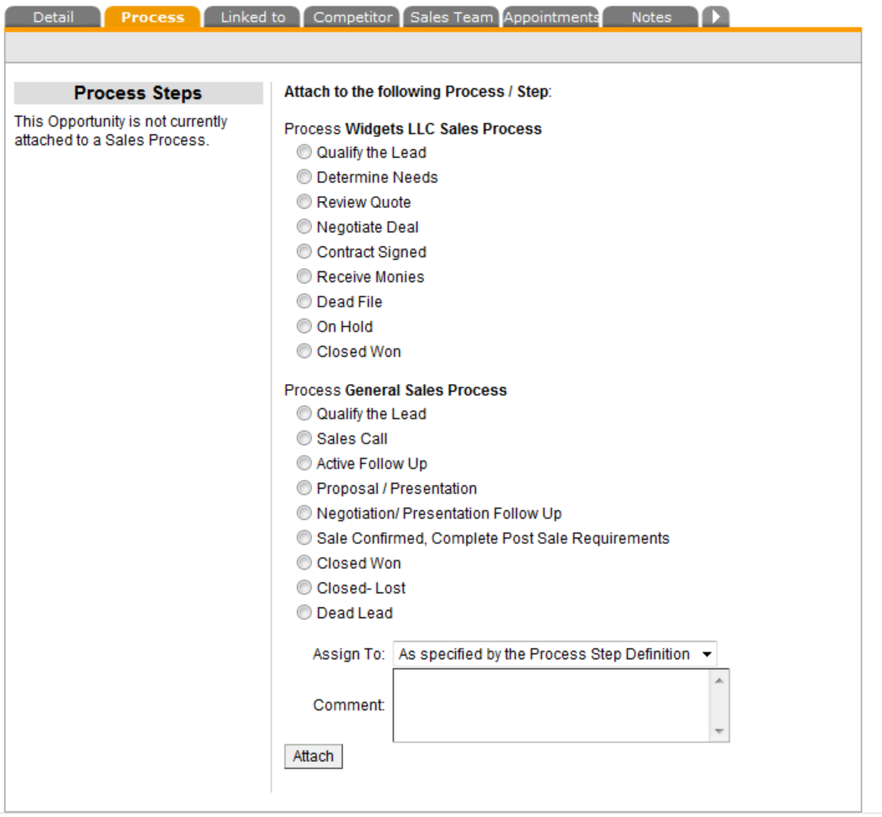
2. Click on the link for the opportunity you want to attach to a process and then click on its **details** link**.**

   PlanPlus Online displays the **Opportunity Detail** page.



3. Click on the **Process** Sub Tab.

PlanPlus Online displays the **Process** tab.



- ✪ If you have created your process but you do not see it on the page, you have probably not published your process. Refer to Lesson 3 for instructions on publishing your process.

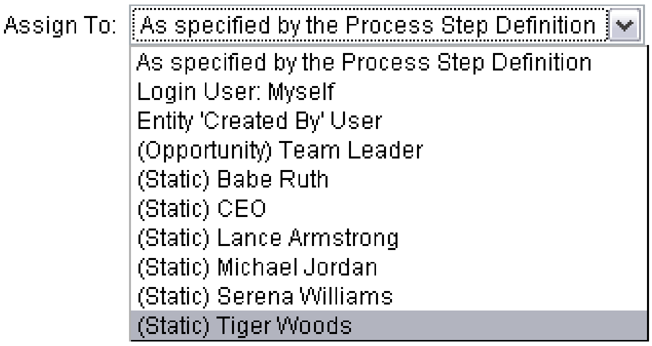
- ✪ If you have published more than one process, PlanPlus Online displays all of the processes and allows you to choose which process you want to attach to the opportunity.

4. Select the process you want to attach to the opportunity and click on the radio button next to the step you want to make current.

   - ✪ This represents where the opportunity will start in the process.

   - ✪ It is best to start opportunities at the first step in the process, so you have a record of the number of opportunities you have moved through the process.

5. Click on the **Assign To** drop-down menu.



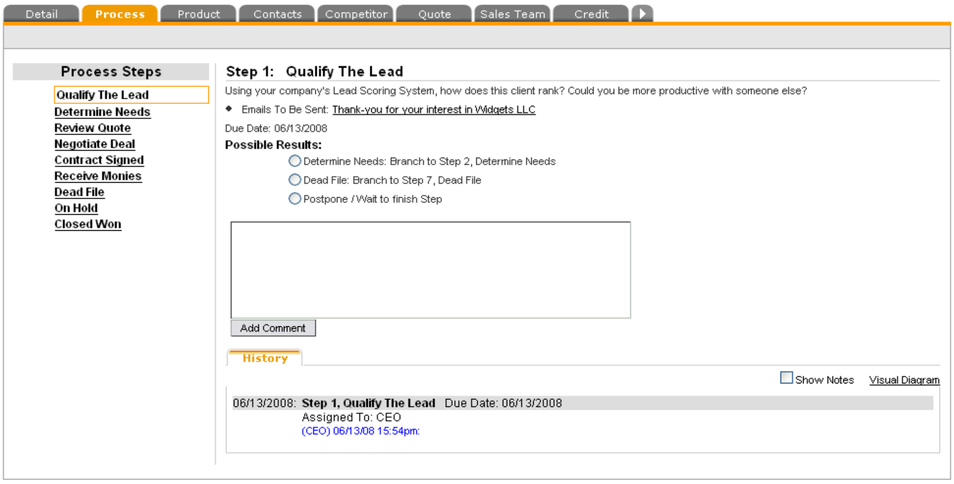
6. Select one of the following options from the **Assign To** drop-down menu:

Option	Description
As specified by the Process Step Definition	Assigns the process step to the user you chose while creating the process.
Login User: Myself	Assigns the process step to the current user.
Entity 'Created By' User	Assigns the process step to the user who created the process.
(Opportunity) Team Leader	Assigns the process step to the Team Leader of the opportunity.
(Static) User Name	Assigns the process step to the user you select.

7. Add any necessary comments in the **Comment** box.

8. When you are finished, click on the **Attach** button.

PlanPlus Online attaches the process to the opportunity and refreshes the page.



You have successfully attached the process to the opportunity. PlanPlus Online identifies the current step in the process with an orange border.

✪ For more information on advancing an opportunity through a process, refer to the Opportunity Management course for Users.

Unit Performance Lab

Perfecting Your Skills

In this unit, you learned how to implement your business's processes in PlanPlus Online. In this performance lab, you will complete the process you started in the unit. You will create process action templates and attach possible results and action items to steps.

1. Open the **Unit6** Excel file.

2. Open the tab in the worksheet labeled **Templates to Create**. Create a process action template in PlanPlus Online for each of the templates listed.

3. Open the tab in the worksheet labeled **Possible Result Info**. In the **Process Builder** application, add the possible results for steps 2-9 of the Widgets LLC Sales Process.

4. Open the tab in the worksheet labeled **Action Item Info**. In the **Process Builder** application, add the action items for steps 1-9 of the Widgets LLC Sales Process.

Applying Your Knowledge

1. What are the different types of action items?

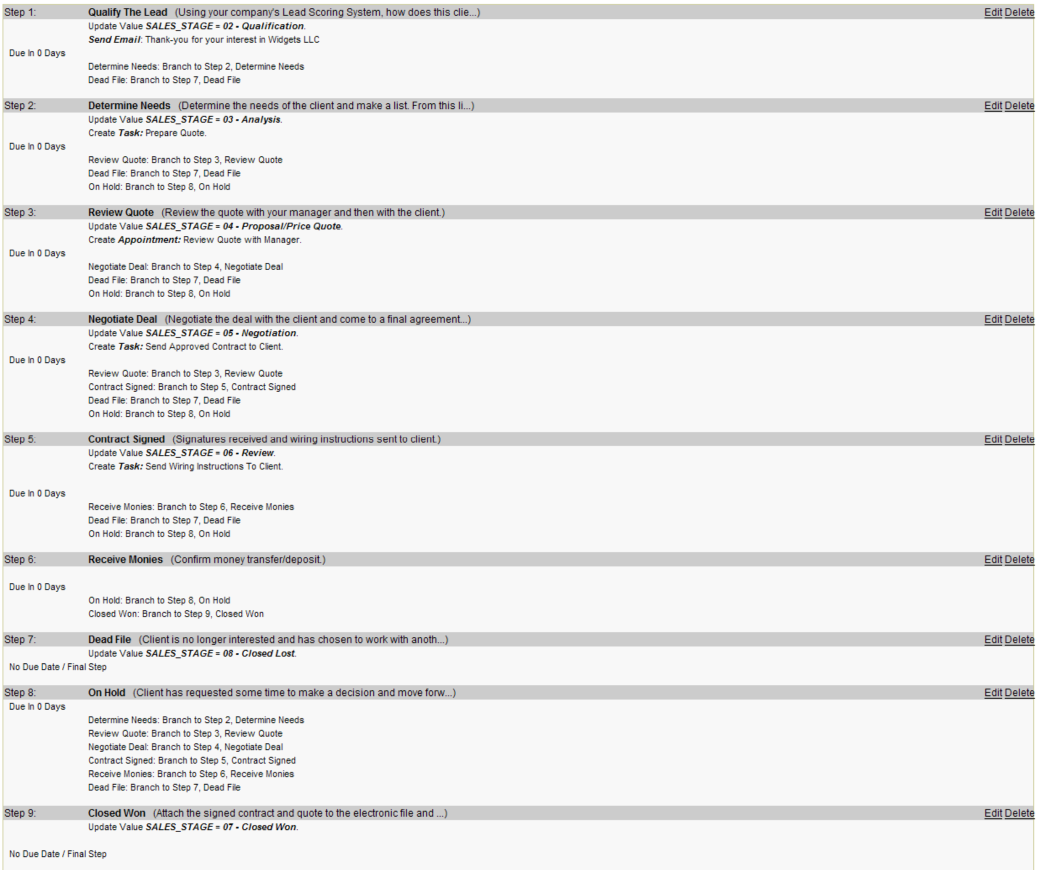
2. What does the **Due In** field represent in a process step?

3. What might be the problem if your process is not in the list of available processes to attach to an opportunity?

4. How would you branch from a step in Process A to a step in Process B?

Performance Lab Answers

When you are finished, your Widgets LLC Sales Process **Edit Process** page should look like the following:



Applying Your Knowledge

1. The three types of action items are:
    - Update Field Value
    - Create an Appointment, Task, Note
    - Send Email

2. The **Due In** field indicates the number of days until the step must be completed to remain on schedule.

3. If the process does not appear in the list of processes to attach to an opportunity, you have probably forgotten to publish the process.

4. In the step in Process A where you want to branch to the other process, you would set one of the possible results to branch to the correct step in Process B.

Unit 7: PlanPlus Online Views / Reports

Unit Objectives:

- Configure and apply filters.
- Create and edit Views / Reports.

Lesson 1: Using Filters

As you add more and more data to PlanPlus Online, your lists of contacts, organizations, and opportunities will become longer. To help ensure that you can always get to the data you need quickly, no matter how much data you have added, PlanPlus Online makes special data filters available in the **Organization, Contact**, and **Opportunity** applications. These filters provide a quick and efficient way to narrow your data down to the specific items you want to view. Using the data filters, you can filter and sort contacts, organizations, and opportunities using criteria such as classification (for example, customer, lead, or prospect), business line (for example, banking, consulting, or government), or team lead (user in your organization responsible for the data).

As a PlanPlus Online administrator, you have the option of displaying these filters for your users or hiding them from their view. In this lesson, you will learn how to configure the filters and how to display or hide them from view.

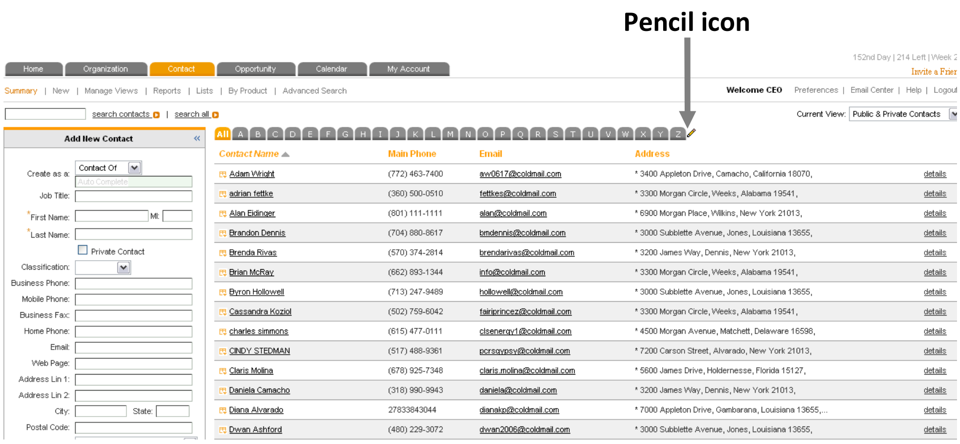
Adding Filters

To add filters to the **Organization, Contact**, and **Opportunity** applications, use the following steps:

1. Click on the Contact, Organization, or Opportunity tab.

   PlanPlus Online displays the Home page for the application you selected.

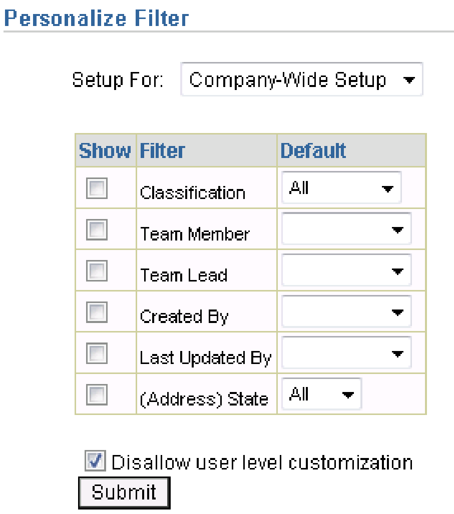
   ✪ The **Contact** Home page is shown below:



2. Click on the pencil icon located on the right side of the header area.

   ✪ The pencil icon either appears to the right of or below the A-Z tabs .

PlanPlus Online displays the **Personalize Filter** page.



✪ We recommend that you keep the **Setup For** field set to **Company-Wide Setup** so that all users see a consistent set of filters.

3. Select the check boxes in the **Show** column corresponding to the filters you want to display and click on **Submit**.

   PlanPlus Online saves the changes and refreshes the page.

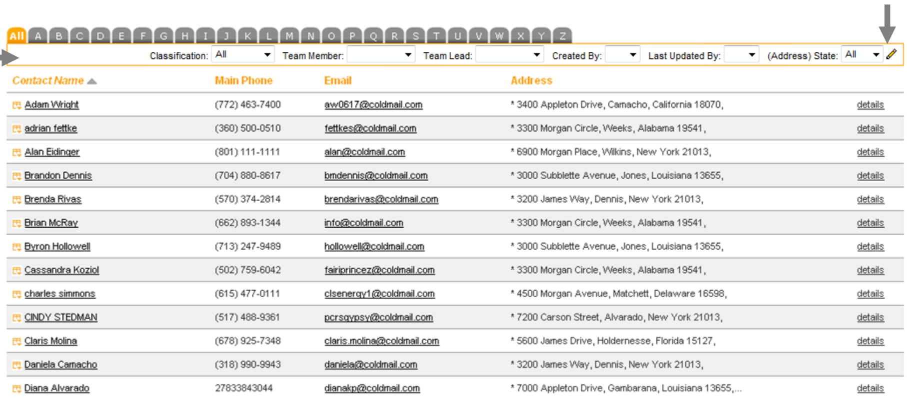
✪ The **Disallow user level customization** check box determines whether individual users will be able to edit their filter settings.

4. Click on the tab of the application whose filters you were editing.

   PlanPlus Online displays the active filters on the application Home page.

Pencil icon

Filters



✪ The filters you selected appear below the **A-Z** tabs.

✪ The pencil icon appears to the right of the filters when filters are active.

- To use the filters to find a specific set of data, make a selection from one of the filter drop-down menus. When you make a selection, PlanPlus Online automatically applies the filter and refreshes the page to display the data matching the criteria you selected.

- You can apply more than one filter at once. For example, you can apply a **Team Lead** filter and then apply an (**Address) State** filter to display every contact with a certain team lead in a certain location.

- If necessary, select a new view that further narrows your information prior to using the filters.

Hiding Filters

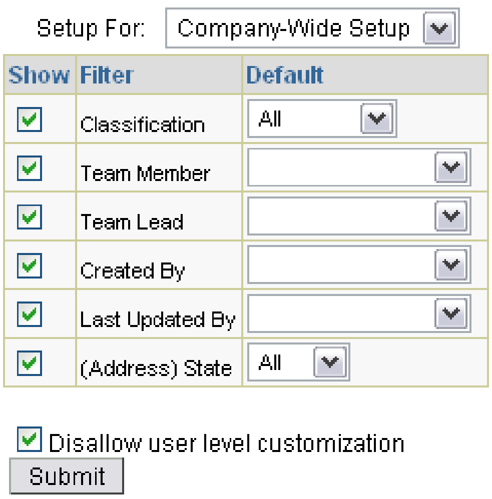
To hide any of the filters you have added to the **Organization, Contact**, and **Opportunity** applications, use the following steps:

1. Click on the **Contact**, **Organization** or **Opportunity** tab.

   PlanPlus Online displays the Home page for the application you selected.

2. Click on the pencil icon located to the right of the filters.

   PlanPlus Online displays the **Personalize Filter** page.



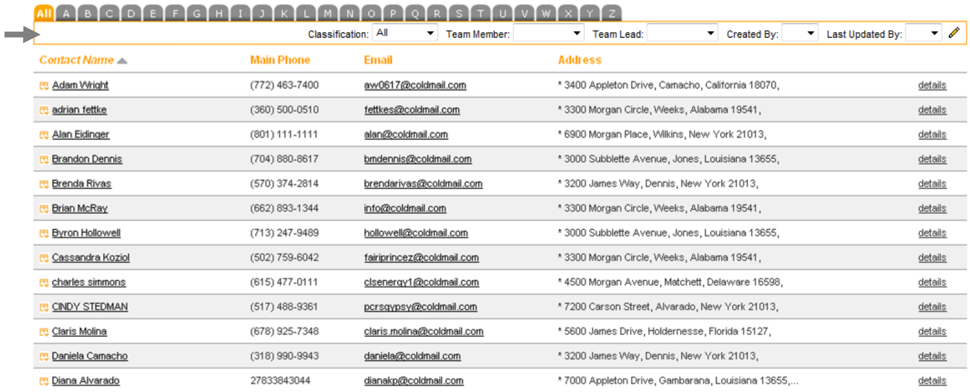
3. Clear the check boxes for any of the filters that you would like to hide and click on **Submit**.

   PlanPlus Online saves the changes and refreshes the page.

4. Click on the tab of the application whose filters you were editing.

   PlanPlus Online displays the filters you selected on the application Home page.

Filters



- ✪ Any filters you chose to hide will no longer be visible.
- ✪ If you hide all of the filters, PlanPlus Online will display the pencil icon ✏ to the right of the **A-Z** tabs.

Lesson 2: Managing Views and Reports

In PlanPlus Online, views and reports share the same basic definition. Both consist of a data source, a set of fields to display in columns, and a set of search criteria.

Although they share the same definition, views and reports have different uses in PlanPlus Online. You use views to interact with your data in real-time within the PlanPlus Online applications, while you use reports to capture a point-in-time snapshot of your data for publishing or further analysis.

As a PlanPlus Online administrator, you will spend the majority of your time performing functions that your clients do not have the knowledge or time to complete. One of these functions will be creating custom views and reports related to your clients' business and industry. You can create new views and reports – or review pre-defined views and reports – from the **Views/Reports** page of the following applications in the PlanPlus Online Sales Edition:

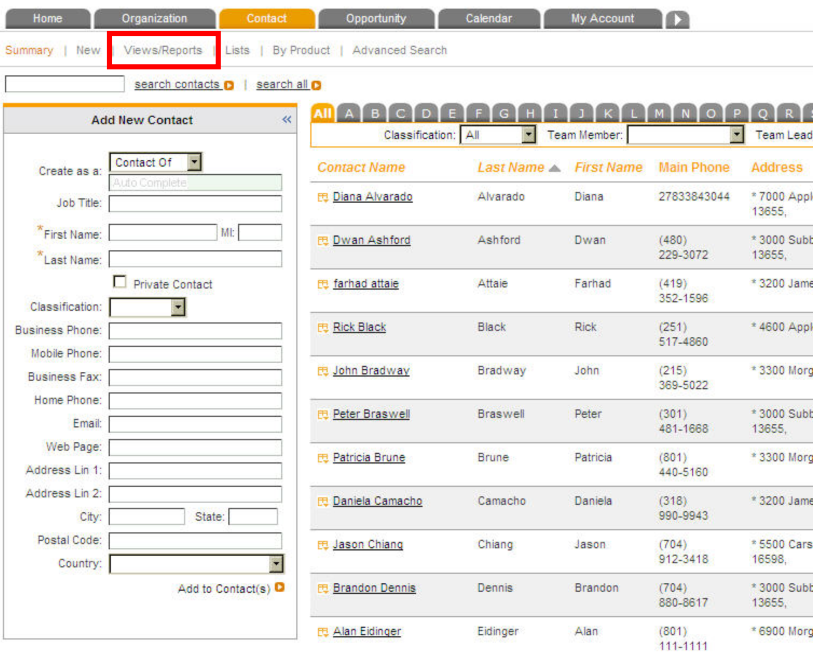
- Organization
- Contact
- Opportunity

Accessing the Views/Reports Page

To access the **Views/Reports** page in one of the PlanPlus Online applications, use the following steps:

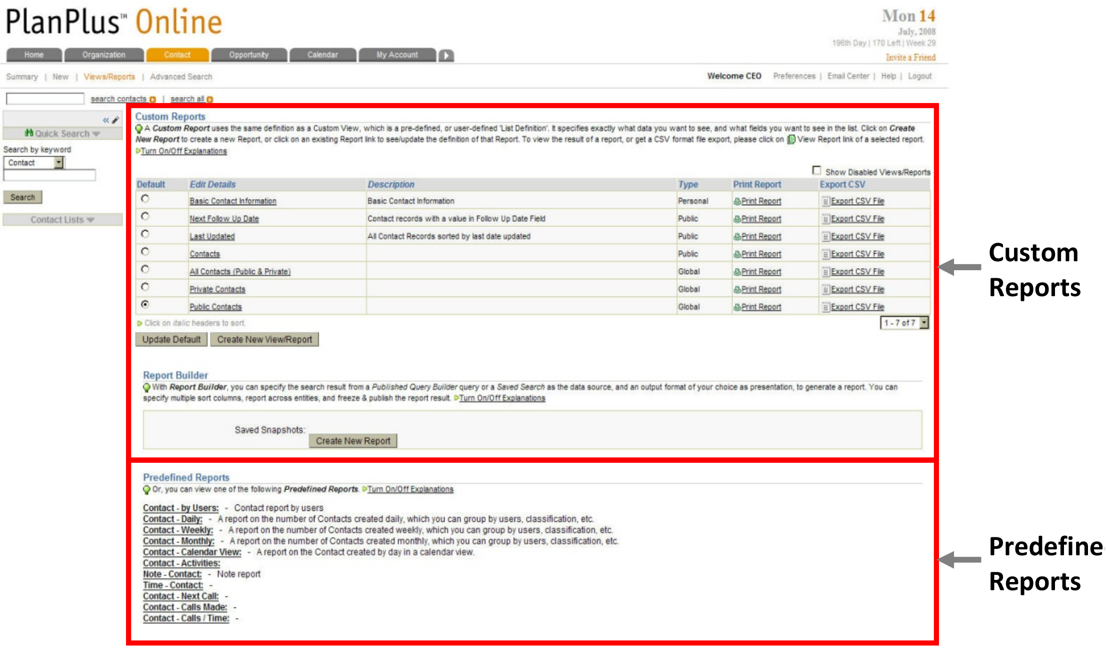
1. Click on the application tab.

   PlanPlus Online displays the Home page for the application you selected.



2. Click on **Views/Reports** in the Sub Menu.

   PlanPlus Online displays the **Views/Reports** page.



✪ The **Views/Reports** page contains two sections:

- **Custom Reports**: You can edit any of these reports by changing the report criteria. Each of these reports is also available as a view within the application.
- **Predefined Reports**: These reports cannot be edited or customized in any way. They are standard reports given to every PlanPlus Online user.

The following table describes the options available in the **Custom Reports** area of the **Views/Reports** page:

Table Column	Function
Default	Allows you to select the view you want to use as your default view for the current application. To change the default, select one of the radio buttons and click on the **Update Default** button.
Edit Details	Allows you to edit the report definition. By clicking on the name of the report**,** you can edit details such as Name, Description, Search Criteria, and Columns for View.
Description	Displays the report description. You can create or edit a report description by clicking on the report name in the **Edit Details** column.

Table Column	Function
Type	Indicates whether the report is one you created for your personal use only, or if it is one that has been published for other users to view. A Global View is a view for all users of PlanPlus Online - not just the organization that created it. There are 3-4 Global Views by default.
Print Report	Displays a **Print Report** link that you can use to print the selected report.
Export CSV	Displays an **Export CSV File** link that you can use to export the report to a comma-separated values (CSV) file.

✂ You can access all of the predefined reports for the entire PlanPlus Online system on a single page by clicking on the **Home** tab and then clicking on the **Reports** link in the Sub Menu.

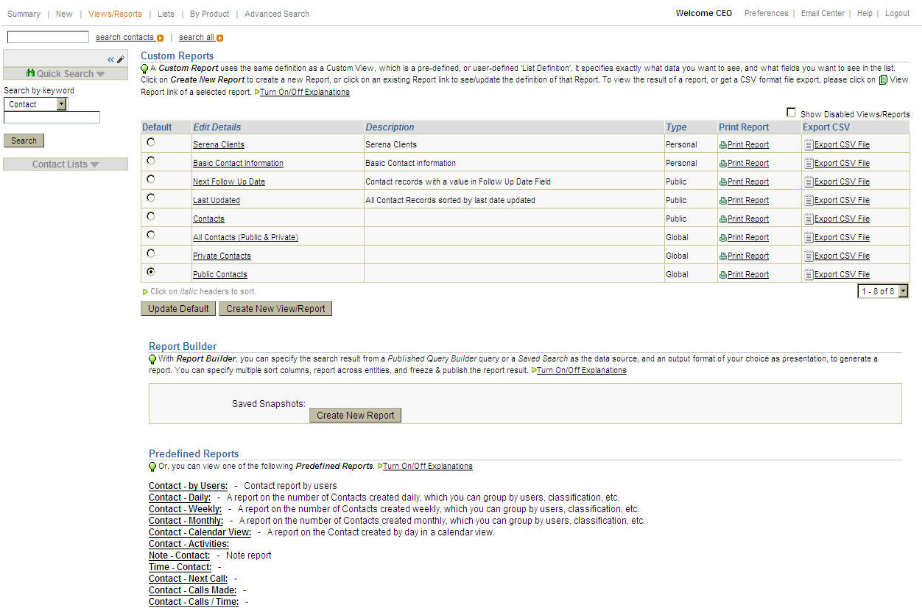
Creating Views and Reports

In PlanPlus Online, as you build and edit views, you are simultaneously building and editing a corresponding report.

To create a view or report in the **Organization**, **Contact**, or **Opportunity** applications, use the following steps:

1. If necessary, navigate to the **Views/Reports** page by clicking on **Views/Reports** from the Sub Menu of the **Organization**, **Contact**, or **Opportunity** Home page.

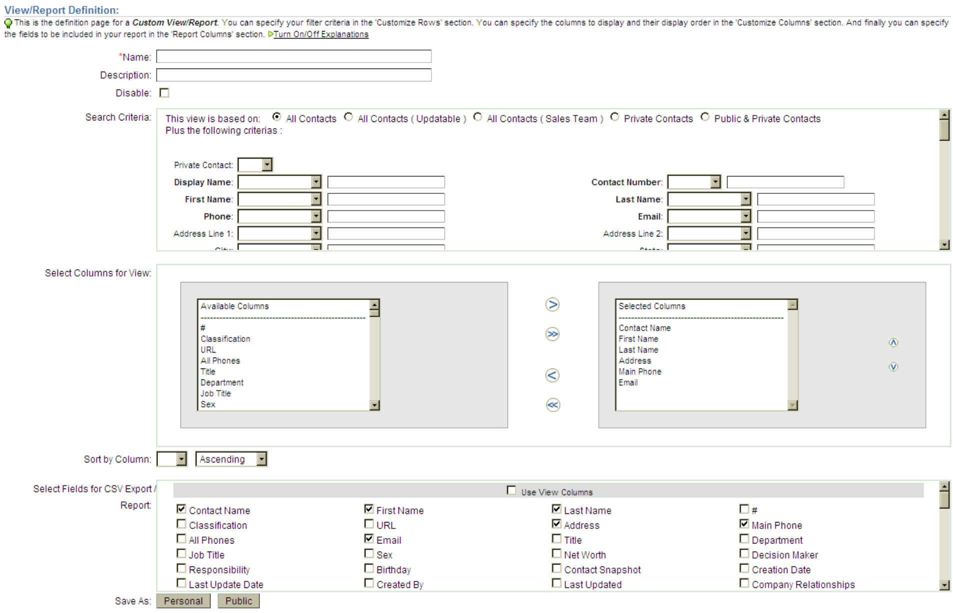
   PlanPlus Online displays the **Views/Reports** page.



✪ This is the page where you set your default Views for the chosen application.

2. Click on the **Create New View/Report** button.

   PlanPlus Online displays the **View/Report Definition** page.



The **View/Report Definition** page contains the following six sections:

Section	Function
Name, Description, Disable fields	Allows you to name the view/report, give it a description, and optionally disable it, so that it is not available for use.
Search Criteria	Allows you to identify the specific data that you want to include in your view/report.
Select Columns for View	Allows you to choose the columns that you want to display in the new view.
Sort by Column	Allows you to choose how you want to sort the data.
Select Fields for CSV Export/Report	Allows you to choose the columns that you want to appear in the report. If you choose, you can set the report columns to match the columns for the view that you selected in the **Select Columns for View** section.
Save As	Allows you to save the view for your own use by clicking on the **Personal** button or publish the view for everyone in your organization to use by clicking on the **Public** button.

3. Enter a name for the new view/report in the **Name** field.

4. Enter a description for the new view/report in the **Description** field.

5. If you want to exclude the view/report from lists of available views and reports, select the **Disable** check box.

   ✪ Disabled views/reports are not permanently deleted; they are just temporarily hidden from view. You can view all of your disabled views/reports on the **Views/Reports** page by selecting the **Show Disabled Views/Reports** check box.

Show Disabled Views/Reports check box

6. In the **Search Criteria** section, choose the information that you would like to display in the view.

   ✪ The **This view is based on** options allow you to filter your view by selecting one of the radio buttons next to the listed filters.

The following table describes the search operators that are available for many of the fields in the **Search Criteria** section.

Operator	Description
Equals	Finds data that matches the character string exactly.
Not Equals	Finds data that does not match the character string.
Contains	Finds data that contains the character string. Unlike the **Equals** operator, the **Contains** operator does not require an exact match.
Does Not Contain	Finds data that does not contain the character string.
Starts With	Finds data that begins with the character string.
Ends With	Finds data that ends with the character string.

Operator	Description
=	This symbol represents the Equals operator.
!=	This symbol represents the Not Equals operator.
>	Finds numeric data that is greater than the criteria value.
>=	Finds numeric data that is greater than or equal to the criteria value.
<	Finds numeric data that is less than the criteria value.
<=	Finds numeric data that is less than or equal to the criteria value.
Between	Finds data between two dates or numbers.

For example, if you want to run a report in the **Contact** application for all contacts with the classification of **Client** who live in the state of California and were created in the database between March 1st and June 1st, you would do the following:

- Click on the **Search** button for the **Classification** field to display the **View/Search Definition** window, select **Equals** from the **Field Value** drop-down menu, select **Client** from the list box, and click on **OK**.

- Click on the **State** drop-down menu, select **Equals**, and type **California** into the text box.

- Select **Between** from the drop-down menu in the **Creation Date** field, then click on the button to display the **Date/Range Selector** window, select March 1st and June 1st from the calendars, and click on **OK**.

7. In the **Select Columns for View** section, identify all the columns you want to appear in the view by adding them to the **Selected Columns** list box.

✪ By default, PlanPlus Online pre-populates the **Selected Columns** list box with several frequently used columns.

The following table describes the action buttons that you can use to add and remove columns for the view:

Button	Description
	Removes any selected columns from the **Selected Columns** list box.
	Removes all columns from the **Selected Columns** list box.
	Adds any selected columns from the **Available Columns** list box to the **Selected Columns** list box.
	Adds all available columns to the **Selected Columns** list box.
	Moves the selected column up in the list. The column that appears at the top of the **Selected Columns** list box will be the left-most column in the view.
	Moves the selected column down in the list. The column that appears at the bottom of the **Selected Columns** list box will be the right-most column in the view.

8. In the **Sort by Column** section, select the number of the column that you would like to sort by and then select **Ascending** or **Descending** to set the sort order.

   ✪ The column numbers in the **Sort by Column** drop-down menu correlate to the columns listed in the previous section. The top column in the list is #1. The second column in the list is #2, etc.

   ✪ When the sort order is set to **Ascending**, PlanPlus Online sorts the data in the following way:

   - Characters are sorted from A-Z.
   - Numbers are sorted from smallest to largest.
   - Dates are sorted from newest to oldest.

   ✪ When the sort order is set to **Descending**, PlanPlus Online sorts the data in the following way:

   - Characters are sorted from Z-A.
   - Numbers are sorted largest to smallest.
   - Dates are sorted oldest to newest.

9. In the **Report Columns** section, select the check boxes for all of the columns you want to display in the report.

   ✪ If you would like to use the same columns as the view, select the **Use View Columns** check box.

10. In the **Save As** section, do one of the following:
    - Click on the **Personal** button to save the view/report for your use only.
    - Click on the **Public** button to save the view/report and make it available to everyone in your organization who has access to its data.

    PlanPlus Online saves the view/report and refreshes the **View/Report Definition** page, displaying the following links at the top right corner of the page:

    ✪ You can click on the **See this view** link to open the view for your review.

    ✪ You can click on the **View this report** link to open a copy of the report for your review.

Editing Views and Reports

To edit a view or report, use the following steps:

1. From the **Views/Reports** page, click on the link for the report you want to edit from the **Edit Details** column in the **Custom Reports** area.

   PlanPlus Online displays the **View/Report Definition** page for the report you selected.

2. Edit the details of the view/report as necessary.

3. When you have finished editing the report, click on either the **Personal** or **Public** button in the **Save As** section to save your changes.

   PlanPlus Online saves the view/report and refreshes the **View/Report Definition** page.

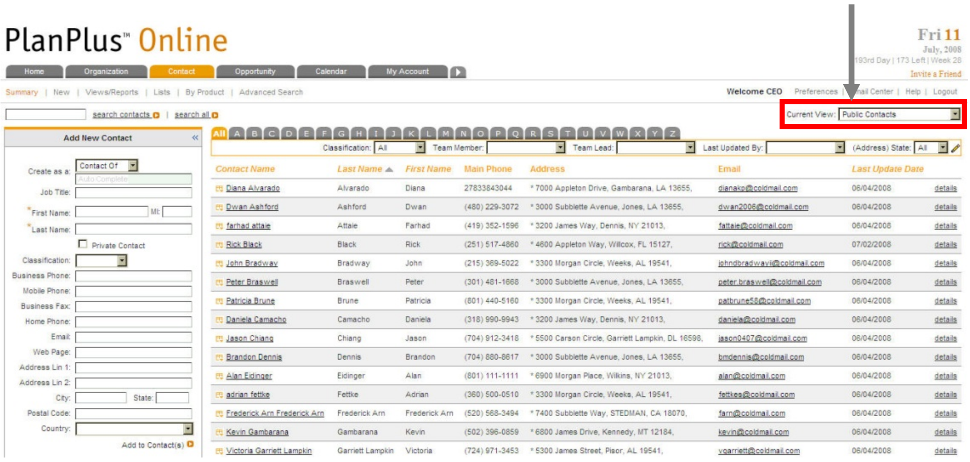
Displaying Views

To display a view, use the following steps:

1. Click on the desired application tab.

   PlanPlus Online displays the Home page for the application you selected.

Current View menu



2. Click on the **Current View** drop-down menu.

   PlanPlus Online displays a list of available views.

3. Click on the view that you want to display.

   PlanPlus Online refreshes the page and displays the view you selected.

✪ The **Manage Views/Reports** menu selection provides a quick link to the **Views/Reports** page.

Unit Performance Lab

Perfecting Your Skills

1. In the **Organization** application, display all of the filters except for **Team Member**.

2. Create a new view/report in the **Contact** application using the following information:

   Name and **Description** fields: **Tiger Woods Current Contacts**

   Team Member equals Tiger Woods.

   Last Updated in the past 60 days

   Receiving the **Newsletter.**

   Save it as a **Public** View/Report.

3. Make this View the **Default View** for Tiger Woods by logging in as Tiger Woods and changing his settings.

   Company Name = (Same as Yours)

   Login = twoods

   Password = twoods

4. Log back in as the Administrator and edit the new **Tiger Woods Current Contacts** View/Report by including all of the clients who are **Mildly Interested** and **Very Interested.**

5. Open the **Tiger Woods Current Contacts** Report and raise your hand. The instructor will review your work.

Applying Your Knowledge

1. How would you change the default Contacts View for your agents without logging in to their accounts to make the change?

2. When you edit a Report after it has been created and saved, does it also edit the View?

3. How do you show all disabled reports?

Performance Lab Answers

Perfecting Your Skills

1. Click on the Organization tab.
   Click on the pencil icon located to the right of the filters.
   Select all of the check boxes except for the one corresponding to **Team Member**.
   Click on the **Submit** button.

2. Click on the **Contact** tab.
   Click on **Views/Reports** in the Sub Menu.
   Click on the **Create New View/Report** button.
   Enter **Tiger Woods Current Contacts** in both the **Name** and **Description** fields.
   In the **Search Criteria** section, scroll down to the **Team Member** field.
   Select **=** from the **Team Member** drop-down menu.
   Select **Tiger Woods** from the adjacent drop-down menu.
   Scroll to the **Last Update Date** field.
   Select **Between** from the **Last Update Date** drop-down menu, then click on the date selection icon ( ).
   Click on the **Today** radio button, select **-(Days After)** from the **Today** drop-down menu, enter **60** in the adjacent text box, and click on **OK**.
   Scroll down to the **Newsletter** field.
   Select **Contains** from the **Newsletter** drop-down menu.
   Enter the letter **Y** in the adjacent field.
   Click on the **Public** button in the **Save As** section.

3. Log in as Tiger Woods.
   Click on the **Contact** tab.
   Click on **Views/Reports** in the Sub Menu.
   In the **Custom Reports** area, click on the radio button in the **Default** column for the **Tiger Woods Current Contacts** view/report.
   Click on the **Update Default** button.

4. Log back in as the Administrator.
   Click on the **Contact** tab.
   Click on **Views/Reports** in the Sub Menu.
   In the Custom Reports area, click on the **Tiger Woods Current Contacts** link in the **Edit Details** column.
   In the **Search Criteria** area, click on the **Search** button for the **Interest Level** field and choose **Equals**. Hold down the **Ctrl** key and select **Mildly Interested** and **Very Interested.**
   Click on the **OK** button.
   Click on the **Public** button in the **Save As** section.

5. Click on the **View this report** link at the top right of the page and raise your hand.

Applying Your Knowledge

1. Set the Default View for the Agent role to the desired view.

   My Account>Security>Roles>Edit (Access to Views)> Set Default

2. Yes, it also edits the view and vice-versa.

3. Click on the **Show Disabled Views/Reports** check box.

Unit 8: Advanced Features

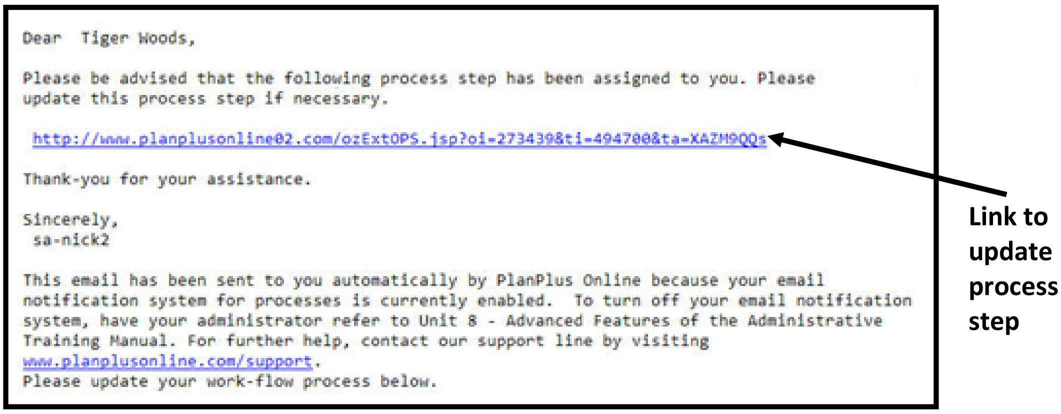
Unit Objectives:

- Configure Lead Boomerang email notifications.
- Access and create your External Page.
- Recall information from the Recycle Bin.
- Merge duplicate Contact records.
- Edit Appointment categories and user color codes for the Calendar.

Lesson 1: Lead Boomerang

In Unit 6, you learned how to create and edit workflow processes. In this lesson, you will learn how to configure what we at PlanPlus Online call Lead Boomerang. Lead Boomerang lets you configure PlanPlus Online to send out interactive emails to users in your organization when a step in a process is re-assigned from one user to another or when a process step to which a user has been assigned comes due. The recipient of the email can update the status of the process by advancing it to one of the possible results or reassigning the step to another user from his/her mobile phone email center without having to log in to PlanPlus Online. The Lead Boomerang system then updates specific field values in your organization’s PlanPlus Online application.

The following is an example of a Lead Boomerang notification email message:


Dear Tiger Woods,

Please be advised that the following process step has been assigned to you. Please update this process step if necessary.

http://www.planplusonline02.com/ozExtOPS.jsp?oi=273439&ti=494700&ta=XAZM9QQs

Thank-you for your assistance.

Sincerely,
sa-nick2

This email has been sent to you automatically by PlanPlus Online because your email notification system for processes is currently enabled. To turn off your email notification system, have your administrator refer to Unit 8 - Advanced Features of the Administrative Training Manual. For further help, contact our support line by visiting www.planplusonline.com/support.
Please update your work-flow process below.

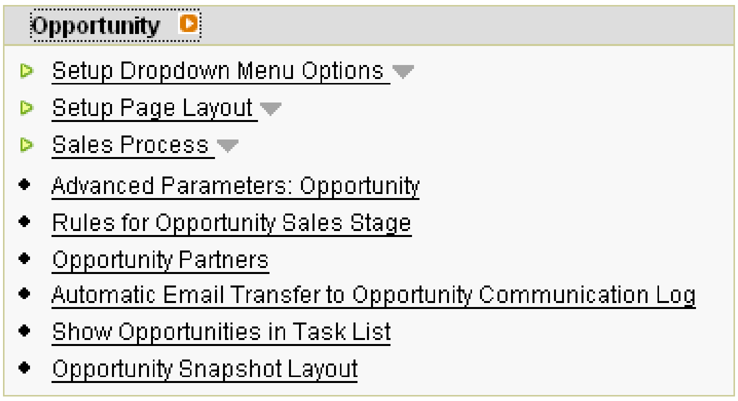
To configure your Lead Boomerang settings, use the following steps:

1. Click on the **My Account** tab.

   PlanPlus Online displays the **My Account** page.

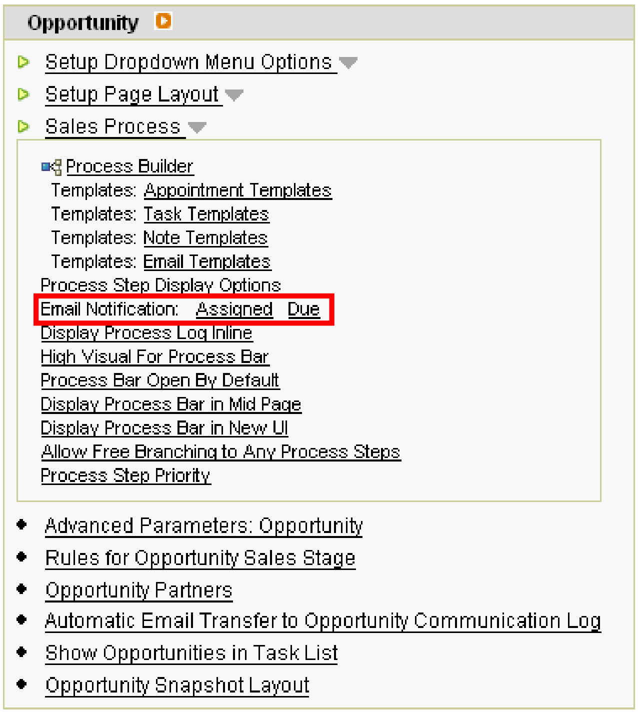
2. Click on the **Opportunity** heading.

   PlanPlus Online displays the **Opportunity** section menu.



3. Click on the **Sales Process** link.

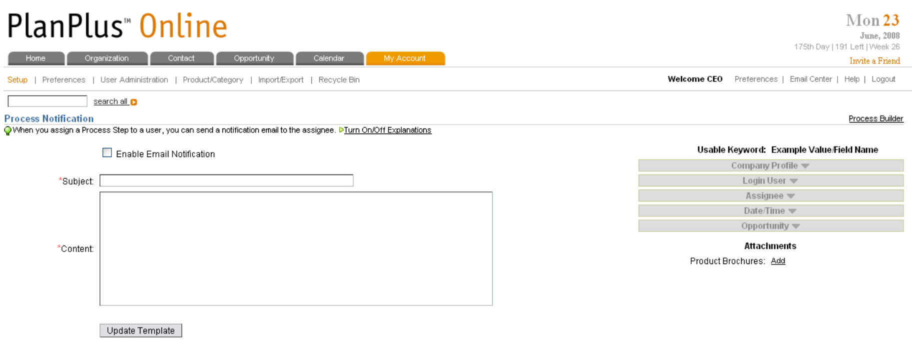
   PlanPlus Online displays the **Sales Process** options.



✪ The Lead Boomerang settings are listed under **Email Notification**. There are two options: **Assigned** and **Due**. The **Assigned** option allows you to configure the email message that PlanPlus Online sends to users when they are assigned a process step. The **Due** option allows you to configure the email message that PlanPlus Online sends to users when they have a process step due. The users can then update the process from the email message they receive.

4. Select the link for the **Email Notification** message you want to configure.

   PlanPlus Online displays the **Process Notification** page.



- ✪ The **Enable Email Notification** check box is an account setting that turns on/off the email notification feature for all users in your organization. You must enable the **Assigned** and **Due** notifications separately by selecting the appropriate link from the **Sales Process** options.

- ✪ PlanPlus Online may populate the **Subject** and **Content** fields with default template information. You can delete the default information and replace it with your own message or you can edit the default content as necessary.

5. Select the **Enable Email Notification** check box.

6. Enter or edit the message **Subject**.

7. Enter or edit the message text in the **Content** box.

- ✪ In the message content, you should explain why the recipient is receiving the notification message and what steps he/she should take.

- ✪ You can include merge fields in the message content by selecting the **Add** link for the field from the Mail Merge area of the page. To include the name of the person assigned to the process step, select the **Assignee Name** field (**##ASSIGNEE_NAME##**) from the **Assignee** category.

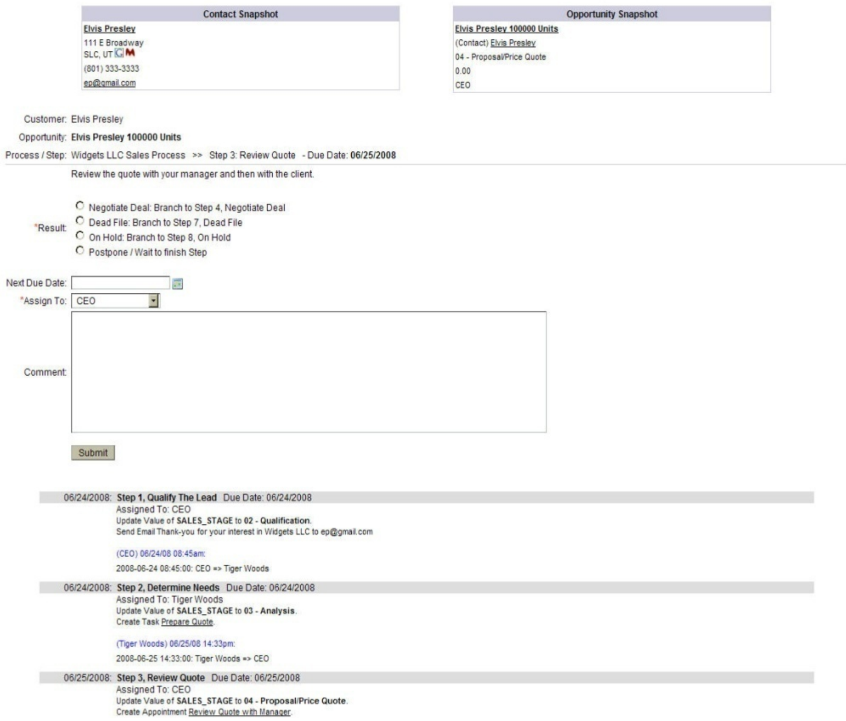
- ✪ To allow the recipient of the message to update the process step from the email, you must include the **Process Step External Access URL** field (**##PROCSTEP_EXT_URL##**) from the **Opportunity** category.

8. When you are finished, click on the **Update Template** button.

   PlanPlus Online saves your changes and displays the **My Account** page.

- ✪ PlanPlus Online will send the email template you created to the users in your organization whenever they are manually re-assigned a process step or when they are responsible for a process step that is due.

- After receiving a notification message, the user can click on the Process Step URL link to access a page from which he/she can update the process without having to log in to PlanPlus Online. The page that displays will look similar to the following:

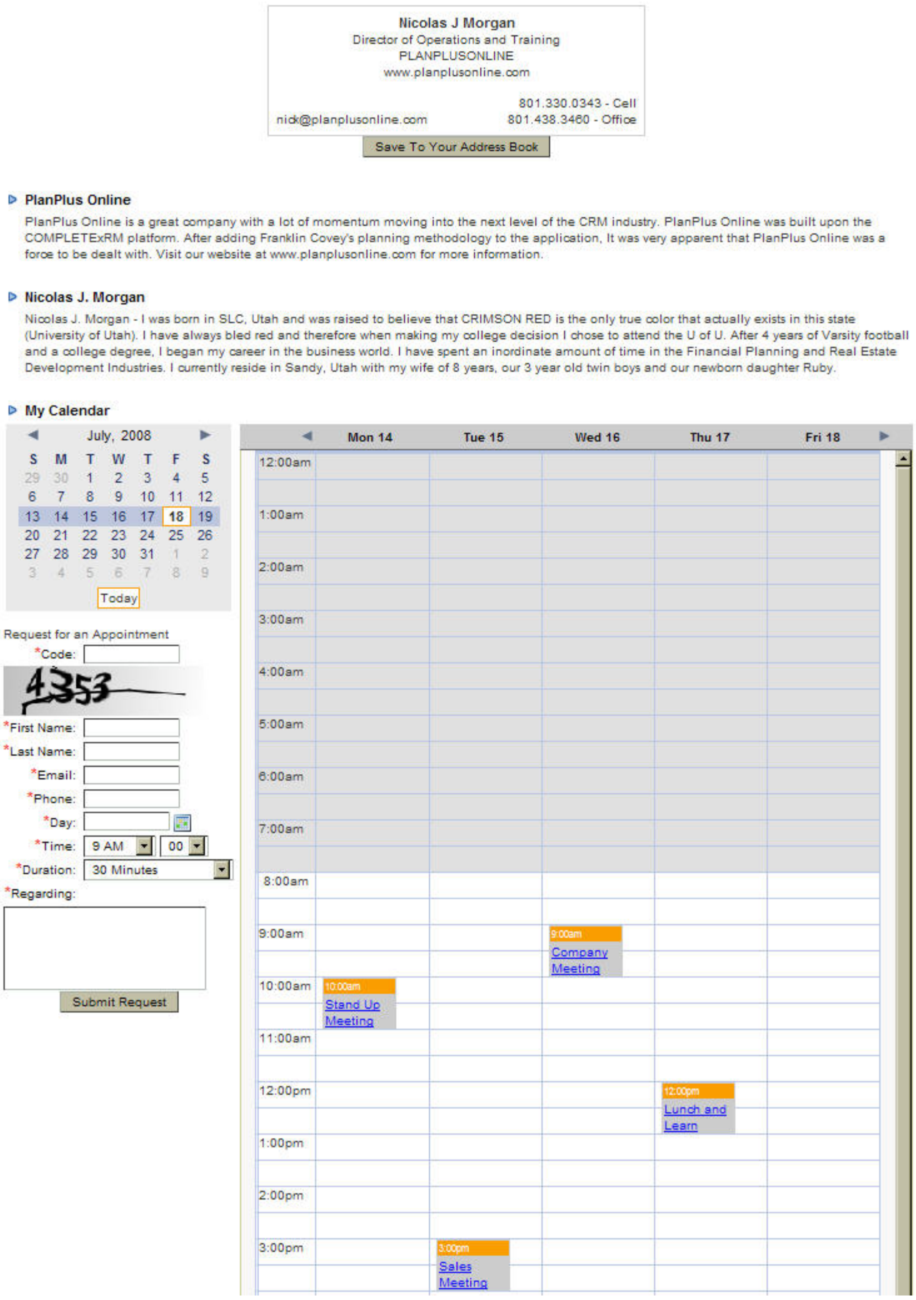


- To advance the process, click on the correct **Result** option, enter or select the due date for the next step in the process from the **Next Due Date** field, and select the user to whom you want to assign the step from the **Assign To** drop-down menu. Enter any comments and click on the **Submit** button.

- If you want to reassign a process step to another user, select the **Postpone/Wait to finish Step** option for the **Result** field, enter or select the new due date for the step from the **Next Due Date** field, and select the user to whom you want to reassign the step from the **Assign To** drop-down menu. Enter any comments and click on the **Submit** button.

Lesson 2: Configuring External Pages

All PlanPlus Online users can create an external personal profile page, called the External Page, which contains their contact information, an introduction to their company, pertinent personal information, and an external view of their Calendar. The External Page can be accessed via a web site address. Visitors to your External Page can easily view your Calendar and request appointments with you. Here is a sample of a very basic External Page.



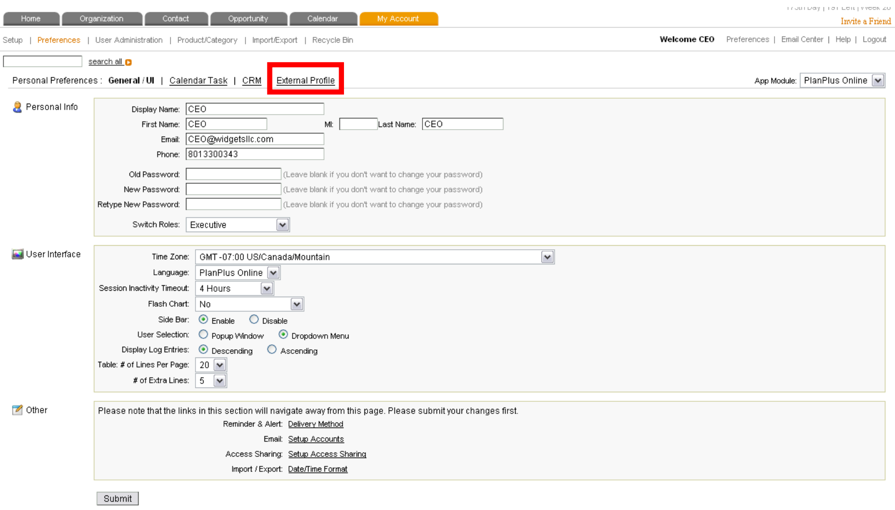
To create your External Page, use the following steps:

1. Click on the **My Account** tab.

   PlanPlus Online displays the **My Account** page.

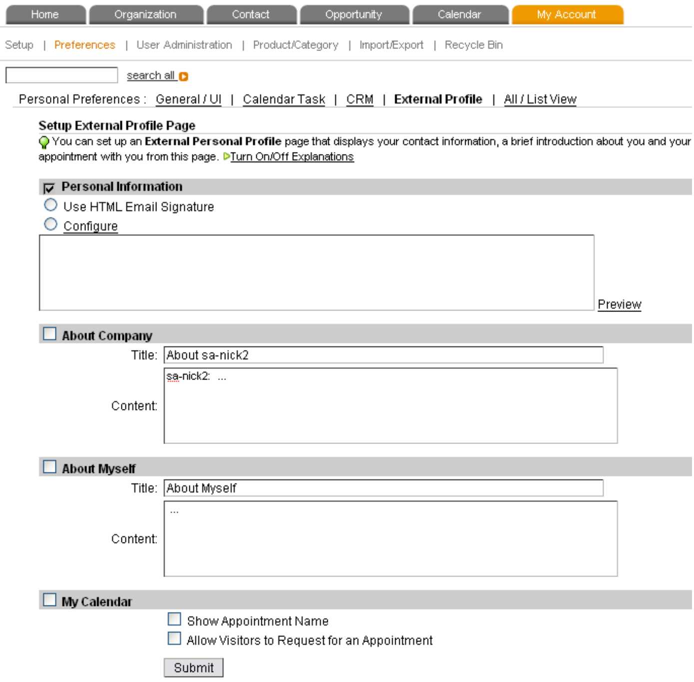
2. Click on **Preferences** in the Sub Menu.

   PlanPlus Online displays the **Personal Preferences: General / UI** page.



3. Click on the **External Profile** link.

PlanPlus Online displays the **Setup External Profile** page.



✪ The **Personal Information** section allows you to specify the contact information PlanPlus Online should display on the External Page.

4. Select one of the following options for the **Personal Information** section:

   ➢ If you have already configured an HTML Email Signature and you want to use that for your contact information, click on the **Use HTML Email Signature** option.

     ✪ If you have configured an HTML Email Signature, PlanPlus Online automatically displays the HTML code in the box. If the box is empty, you have not configured an HTML Email Signature.

   ➢ To configure your contact information, click on the **Configure** link. PlanPlus Online displays a screen from which you can select a signature format. After selecting a format, make any changes to your personal information and click on the **Update** button.

✪ If you are familiar with HTML, you can design your own signature and paste the HTML code into the box.

✪ To preview your personal information, click on the **Preview** link. PlanPlus Online opens a separate window containing your contact information. Click on the **Close** button when you are finished.

5. To display information about your company on your External Page, select the **About Company** check box.

PlanPlus Online enters a default title for the company section in the **Title** field and begins the content for the section in the **Content** field.

6. Edit or replace the information in the **Title** field.

7. In the **Content** field, enter the information you want to display about your company.

   ✪ PlanPlus Online displays the information you enter into the **Content** field in paragraph format on the External Page.

8. To display information about yourself on your External Page, select the **About Myself** check box.

   PlanPlus Online enters a default title for the About Myself section in the **Title** field.

9. Edit or replace the information in the **Title** field.

10. In the **Content** field, enter the information you want to display about yourself.

    ✪ PlanPlus Online displays the information you enter into the **Content** field in paragraph format on the External Page.

11. To display your Calendar on your External Page, select the **My Calendar** check box.

12. If you want to include the names of your appointments on your external Calendar, select the **Show Appointment Name** check box.

13. To allow visitors to request appointments with you, select the **Allow Visitors to Request for an Appointment** check box.

14. Click on the **Submit** button.

15. To preview your external page, click on the **Preview** link located in the top-right section of the page.

    ✪ There are two **Preview** links on the page. One of them displays a preview of your contact information and the other displays a preview of your External Page.

    PlanPlus Online displays a preview of your External Page.

    ✪ When you preview your External Page, the URL posted in the **Address** bar of your browser is the link for your external page. You can make a note of it and have it printed on your business card or other correspondence if you would like.

16. When you have finished previewing your External Page, click on the **Back** button in your browser.

    PlanPlus Online returns to the **Setup External Profile** page.

    ✪ You can also include a link to your External Page in your Email Signature in the Email Center. To do this, click on **Email Center** in the Sub Menu. Click on the **Email Account Setup** option in the Navigation pane. Click on the **Outbound Settings** tab and select the **show personal page link in email signature** check box. Click on the **Submit** button to save your changes.

Lesson 3: Recycle Bin

The Recycle Bin allows you to recall previously deleted Organizations, Contacts, and Opportunities. This safety feature ensures that as an administrator, you will always be able to recall information that you or other users have deleted.

To access and recall information from the Recycle Bin, use the following steps:

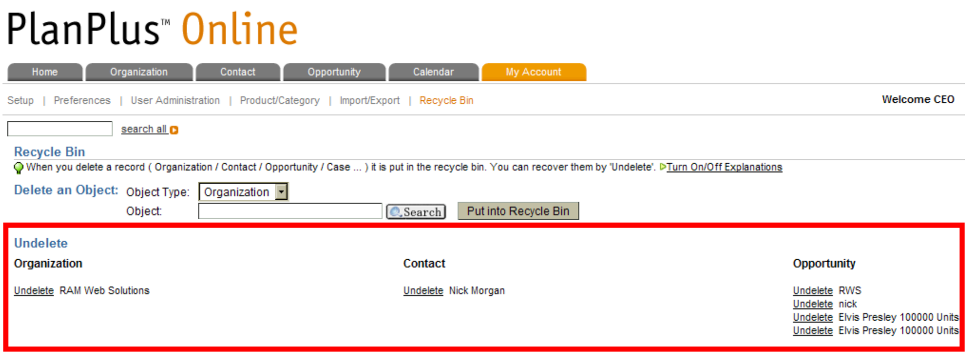
1. Click on the **My Account** tab.

   PlanPlus Online displays the **My Account** page.

   ✪ If you do not see the **Recycle Bin** option in your Sub Menu, you may need to change your default role to a role that allows access to this page.

2. Click on **Recycle Bin** in the Sub Menu.

   PlanPlus Online displays the **Recycle Bin**.



   ✪ The Recycle Bin page is divided into three columns: Organization, Contact, and Opportunity. Your screen will differ depending on the number and type of items you have deleted thus far in the training.

3. To undelete an object, click on the **Undelete** link next to the object's name.

   PlanPlus Online restores the object (removes it from the Recycle Bin and places it back into your application database) and refreshes the page.

   ✪ You can also delete objects directly from the Recycle Bin by selecting the type of object you want to delete from the **Object Type** drop-down menu and clicking on the **Search** button. PlanPlus Online displays a screen containing all of the objects in the application database. Click on the object you want to delete. PlanPlus Online returns to the Recycle Bin. Click on the **Put into Recycle Bin** button to delete the object.

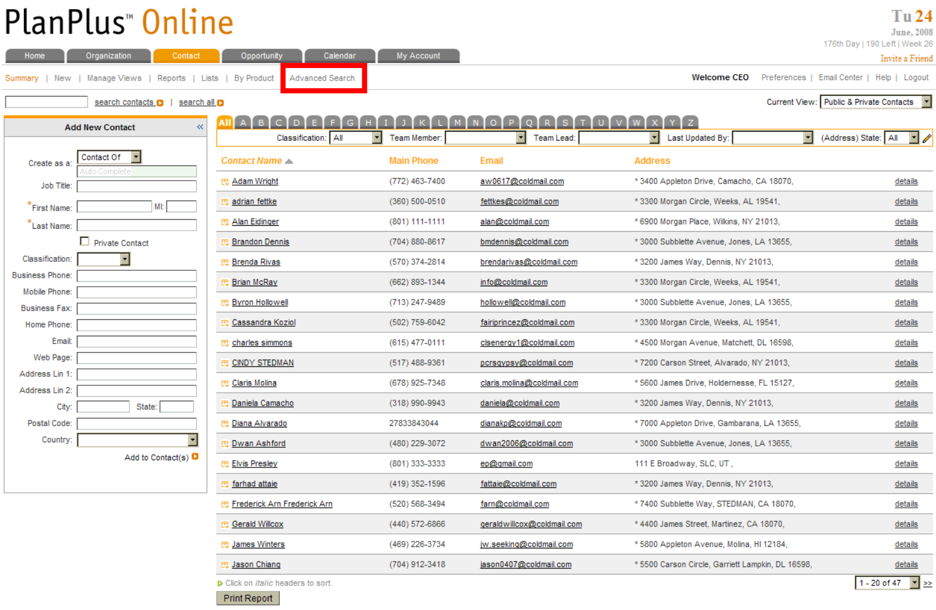
Lesson 4: Merging Duplicate Records

PlanPlus Online gives you the ability to merge duplicate Contact records that might have been created through importing and synchronizing data.

To merge your duplicate Contact records, use the following steps:

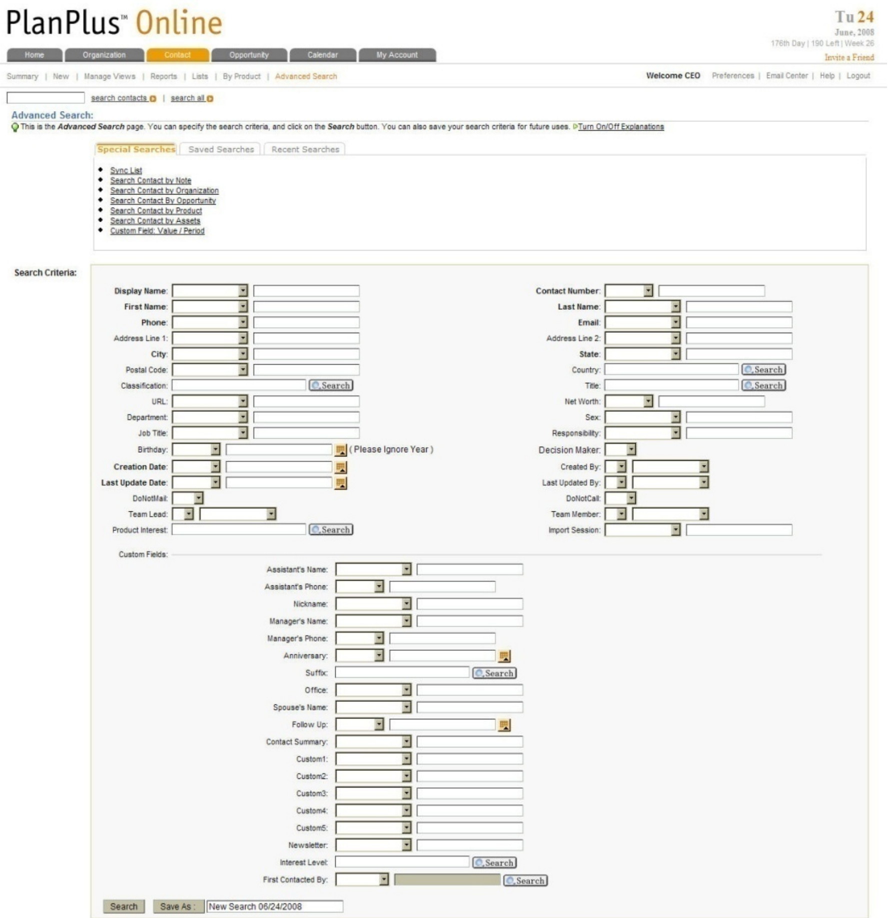
1. Click on the **Contact** tab.

   PlanPlus Online displays the **Contact** Home page.



2. Click on **Advanced Search** in the Sub Menu.

PlanPlus Online displays the **Advanced Search** page.



3. Without entering any information, scroll to the bottom of the page and click on the **Search** button.

PlanPlus Online displays all of your Contact records.

Search Result:

#	Contact Name	Address	Main Phone	Email
1225053193	farhad attaie	* 3200 James Way, Dennis, NY 21013,	(419) 352-1596	fattaie@coldmail.com
1225053192	Jerri Jones	* 7500 Donnelly Avenue, Braswell, DL 16598,	(804) 690-5896	jones9488@coldmail.com
1225053191	Frederick Arn Frederick Arn	* 7400 Subblette Way, STEDMAN, CA 18070,	(520) 568-3494	farn@coldmail.com
1225053190	Peter Braswell	* 3000 Subblette Avenue, Jones, LA 13655,	(301) 481-1668	peter.braswell@coldmail.com
1225053189	CINDY STEDMAN	* 7200 Carson Street, Alvarado, NY 21013,	(517) 488-9361	pcrsgypsy@coldmail.com
1225053188	Jason Staten	* 3300 Morgan Circle, Weeks, AL 19541,	(408) 260-5900	jason.staten@coldmail.com
1225053187	Diana Alvarado	* 7000 Appleton Drive, Gambarana, LA 13655,	27833843044	dianakp@coldmail.com
1225053186	Alan Eidinger	* 6900 Morgan Place, Wilkins, NY 21013,	(801) 111-1111	alan@coldmail.com
1225053185	Kevin Gambarana	* 6800 James Drive, Kennedy, MT 12184,	(502) 396-0859	kevin@coldmail.com
1225053184	Steve Wilkins	* 6700 Carson Place, Gibson, LA 13655,	(480) 251-8889	info@coldmail.com
1225053183	Kate Kennedy	* 3300 Morgan Circle, Weeks, AL 19541,	(480) 961-1225	kathleenkennedy67@coldmail.com
1225053182	Kendra Gibson	* 3000 Subblette Avenue, Jones, LA 13655,	(843) 368-9146	kendra.gibson@coldmail.com
1225053181	Sean Terry	* 6400 Appleton Street, fettke, GA 18070,	(940) 300-9098	seaninarizona@coldmail.com
1225053180	John March	* 3200 James Way, Dennis, NY 21013,	(801) 260-7600	john@coldmail.com
1225053179	adrian fettke	* 3300 Morgan Circle, Weeks, AL 19541,	(360) 500-0510	fettkes@coldmail.com
1225053178	Trevor Riley	* 6100 Morgan Circle, Brune, CA 22484,	(860) 917-5914	triley@coldmail.com
1225053177	Dwan Ashford	* 3000 Subblette Avenue, Jones, LA 13655,	(480) 229-3072	dwan2006@coldmail.com
1225053176	Patricia Brune	* 3300 Morgan Circle, Weeks, AL 19541,	(801) 440-5160	patbrune58@coldmail.com
1225053175	James Winters	* 5800 Appleton Avenue, Molina, HI 12184,	(469) 226-3734	jw.seeking@coldmail.com
1225053174	Megan Nielsen	* 5700 Morgan Place, Chiang, GA 13655,	(626) 329-5889	neilsen.megan@coldmail.com

Click on *italic* headers to sort. 1 - 20 of 47 >>

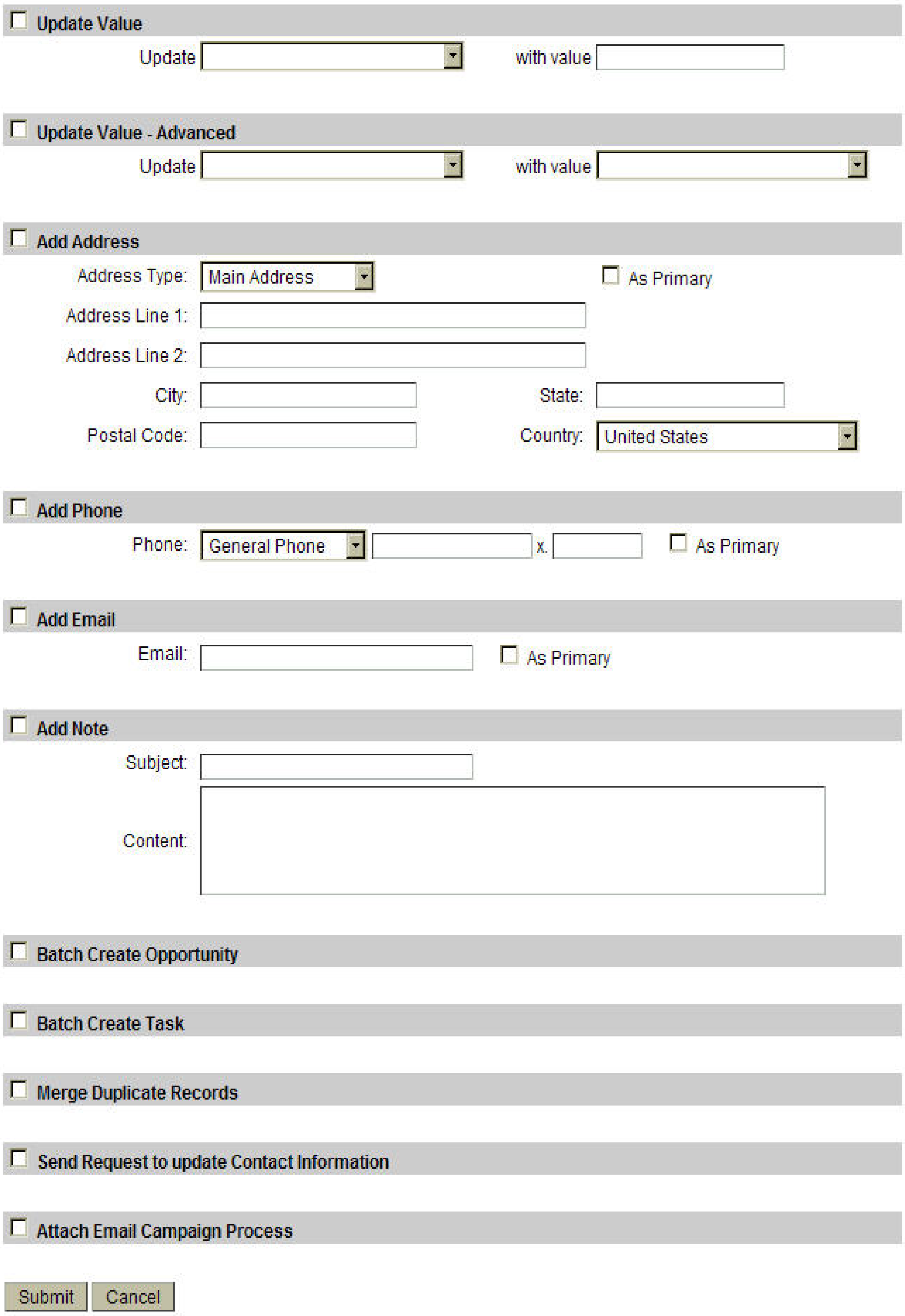
For Selected Entities: Add / Remove Team Member | Batch Assign | Update Value | Mark For Sync | Add To List | Mail & Print | Delete

Print Report | CSV: Select Columns for View | Create New | Back To Summary

4. Select all of the Contacts by first left clicking on the check box in the top left corner and then right clicking on the same check box. This will select all records on the subsequent pages.

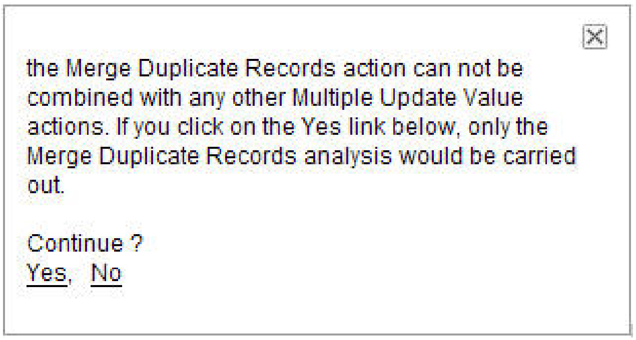
5. Click on the **Update Value** button.

   PlanPlus Online displays the **Update Value** page.



6. Select the **Merge Duplicate Records** check box.

PlanPlus Online displays the following message.



7. Click on the **Yes** link.

   PlanPlus Online searches for duplicate Contact records and displays the results.

   If PlanPlus Online does not locate any duplicate records, it displays a screen similar to the following:

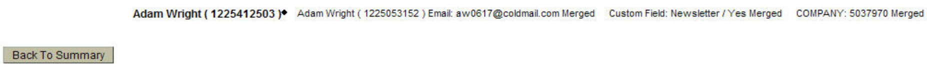
   If PlanPlus Online locates duplicate records, it displays a screen similar to the following:

8. If duplicate records were found, review the duplicate records to make sure you want to merge them.

   ✪ If you do not want to merge a duplicate record, clear the **Select** check box for the record.

9. To merge the selected duplicate records, click on the **Submit** button.

   PlanPlus Online merges the records and displays the **Merge Results** page.



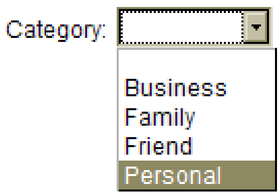
10. Click on the **Back to Summary** button to return to the Contact application.

Lesson 5: Configuring Calendar Categories and User Colors

You may find that you use the Calendar in PlanPlus Online more than any other application. In this lesson, we will introduce a few features that will make the Calendar application more functional and easier to use.

Customizing Calendar Categories

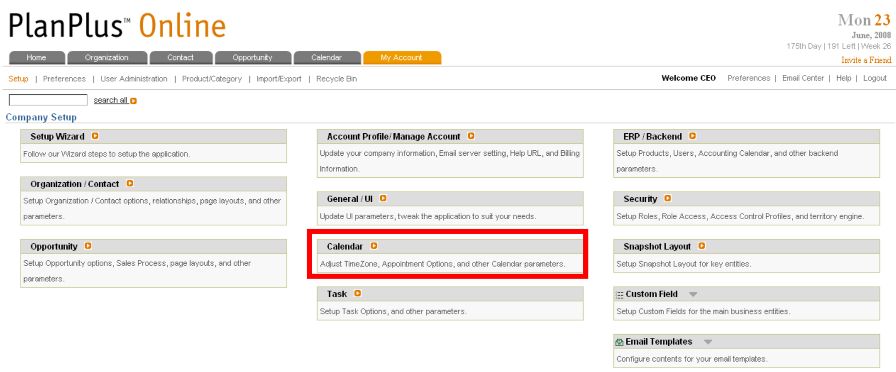
You can easily customize the default appointment categories or create as many new categories as you need. You can also change the color that PlanPlus Online uses to identify each category. The following is the default **Category** drop-down menu, which is located on the **Appointment Detail** page.



To customize the **Category** drop-down menu, use the following steps:

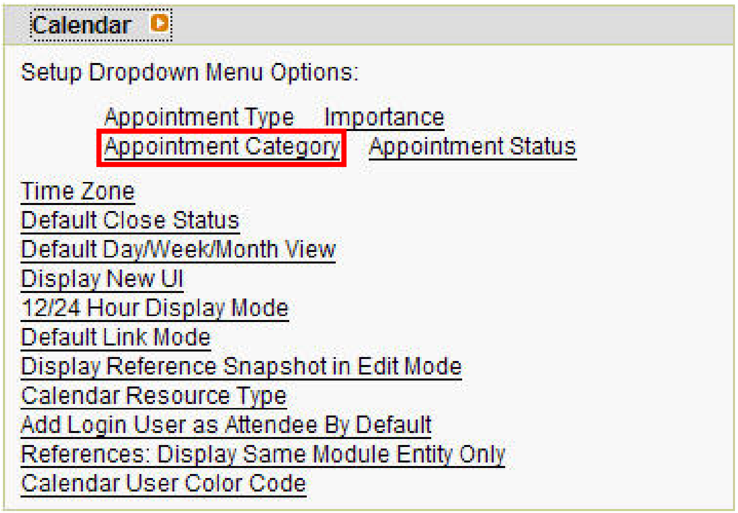
1. Click on the **My Account** tab.

   PlanPlus Online displays the **My Account** page.



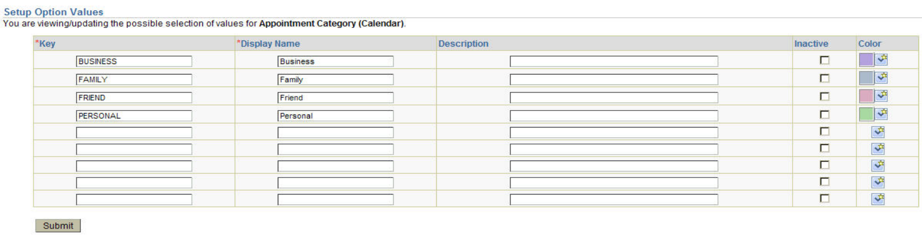
2. Click on the **Calendar** heading.

PlanPlus Online displays the **Calendar** section menu.



3. Click on the **Appointment Category** link.

   PlanPlus Online displays the **Setup Option Values** page.



✪ The entries that you see are the default categories. You can edit the default categories and add new categories from this page. The categories are displayed on the **Category** drop-down menu located on the **Appointment Detail** page

4. Create any new categories and make any necessary changes to the default categories.

✪ To remove a category from the **Category** drop-down menu, select its **Inactive** check box. You can re-activate a category by selecting the **Inactive** check box again.

✪ If you run out of field boxes, click on the **Submit** button. PlanPlus Online saves your changes and refreshes the page with five new open fields.

5. To specify a color for a category, click on its **Color** drop-down menu.

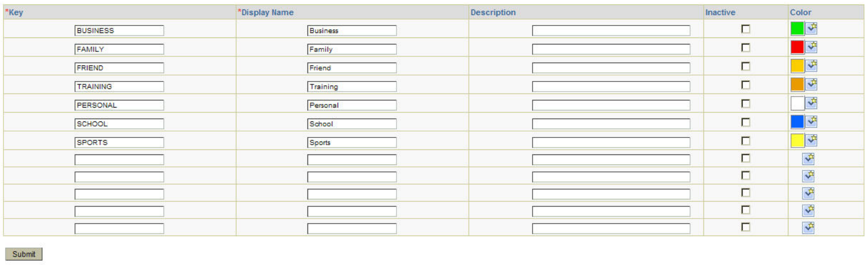
   PlanPlus Online displays a drop-down menu containing color choices.

6. Select one of the default colors or enter a **Hex Code** in the open field and click on the **OK** button.

   ✪ For more information on **Hex Codes**, search for the term **Hex Codes** on Google.

7. When you have finished customizing the categories, click on the **Submit** button.

   PlanPlus Online saves your changes and refreshes the page.



*Key	*Display Name	Description	Inactive	Color
BUSINESS	Business			
FAMILY	Family			
FRIEND	Friend			
TRAINING	Training			
PERSONAL	Personal			
SCHOOL	School			
SPORTS	Sports			

Submit

   ✪ To review your category changes, open the **Calendar** Home page and click on an appointment name to access its **Appointment Detail** page. Select a new category from the **Category** drop-down menu and save your changes. View the appointment from the **Calendar** Home page to make sure the color reflects the new category.

Configuring Calendar User Color Codes

PlanPlus Online allows you to assign each user a color that it will use when displaying appointments on the calendar. PlanPlus Online applies the user's color to the border of their appointments and applies the color for the appointment category to the rest of the appointment block. User color codes are especially helpful when overlaying the calendars of other users.

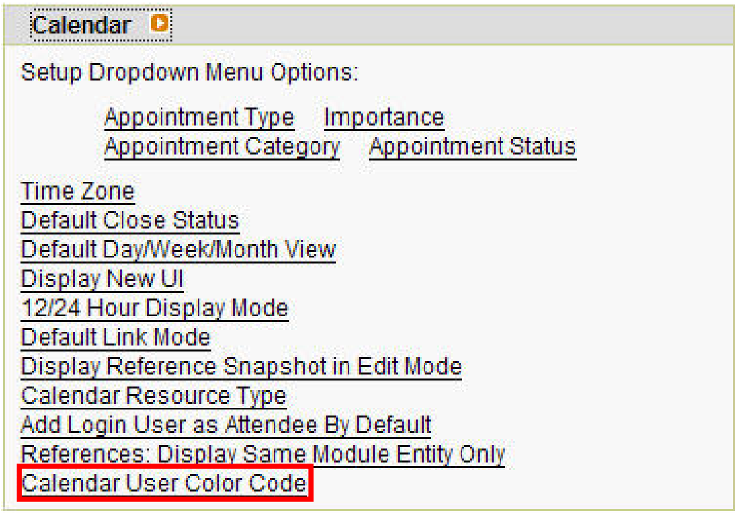
To specify calendar user color codes, use the following steps:

1. Click on the **My Account** tab.

   PlanPlus Online displays the **My Account** page.

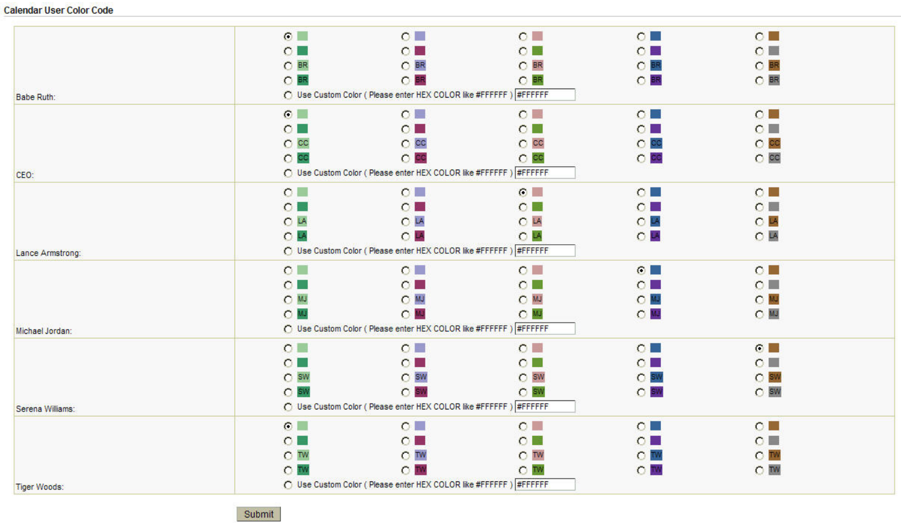
2. Click on the **Calendar** heading.

PlanPlus Online displays the **Calendar** section menu.



3. Click on the **Calendar User Color Code** link.

   PlanPlus Online displays the **Calendar User Color Code** page.



✪ The options that you see are the default colors. You can select one of the default colors or specify a custom color using a Hex Code. For more information on **Hex Codes**, search for the term **Hex Codes** on Google.

4. Find the user(s) you would like to edit and click on a new color code or click on the **Use Custom Color** option and enter a Hex Code.

5. When you are finished, click on the **Submit** button.

   PlanPlus Online returns to the **My Account** page.

✪ To view the new calendar colors, overlay your calendar with the users you edited.

Unit Performance Lab

Perfecting Your Skills

In this unit, you learned how to send Lead Boomerang email messages, configure your External Page, recall information from the Recycle Bin, merge duplicate Contact records, and configure calendar categories and user colors. In this performance lab, you will review each of these features.

1. Change the email address for the Administrator to your personal email address and log out of PlanPlus Online.
2. Log in as the CEO. Same Account Name, Login = CEO, Password = larmstrong
3. Advance the **Elvis Presley 100000 Units** Opportunity to the next step. Assign the next step to the Administrator.
4. Check your personal email for the Lead Boomerang Assigned email. When you are finished, log back in as the Administrator.
5. Ensure that your **External Page** includes your appointment names and that the **External Page** link is included in your Email Signature.
6. Delete the **Elvis Presley 100000 Units** Opportunity from the **Opportunity** Home page.
7. Open the Recycle Bin and undelete the **Elvis Presley 100000 Units** Opportunity.
8. Create the following new Contact:

   Rick Black
   Business Phone - (251) 517-4860

   When PlanPlus Online displays the message about duplicate Contact records, select the **Create as a different contact anyway** link.
9. Merge your duplicate Contact records.
10. Create a Calendar appointment category named **Vacation** and use the Hex Code 00BB00 (0 = ZERO) – What color is it?
11. Create an appointment using the **Vacation** category for next Thursday at 4pm and name it Disneyland! Make sure the color is the same as the Hex Code you inserted.

Applying Your Knowledge

1. Which merge field codes are required when using the Lead Boomerang Assigned and Due email notifications?

2. How many people in your organization can create and maintain an External Page?

3. As a PlanPlus Online user, what are the three types of records you can recall from the Recycle Bin? (This may change depending on the version of PlanPlus Online you are using.)

4. With which type of records are you able to merge duplicates?

5. How many appointment categories are you allowed to display on the **Category** drop-down menu?

Performance Lab Answers

The instructor will review all answers with you.

Applying Your Knowledge

1. The only required merge field is the **##PROCSTEP_EXT_URL## : For Company User Only: Process Step External Access URL** field. This merge field adds a link to the process to the email notification.

2. All users can create an External Page.

3. The three types of records you can recall from the Recycle Bin are:
    - Contacts
    - Organizations
    - Opportunities

4. Contacts

5. You can create an unlimited number of appointment categories.

Index