System Sign-on, Schedule and Mail

Within the Reseller Advantage program group or on your desktop, the system icon is found. When you double-click on the Reseller Advantage icon, the Log-on dialog opens.

Logging On

Trial versions are all preset with an ID and password of GUEST. *We recommend that you do not change them.*

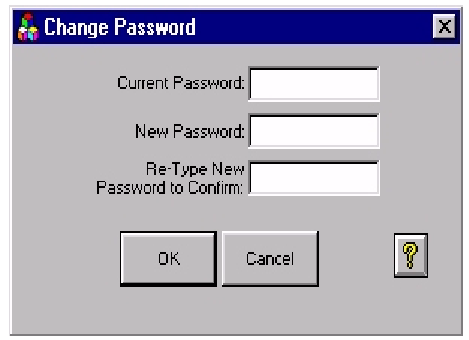
If you are not using a trial copy and want to change your password, click Change Password.

Changing Your Password

To change your password you must know your existing password. If you do not, call your system administrator to get it reset.

Enter your existing password and your new password in both the New Password and the Confirm Password fields. They will display as '****'s. If they match, your password is reset and you are returned to the Log-on dialog. If not, you are asked to re-enter.

If you wish to leave this dialog without changing your password, click **Cancel.**



Mobile Processing

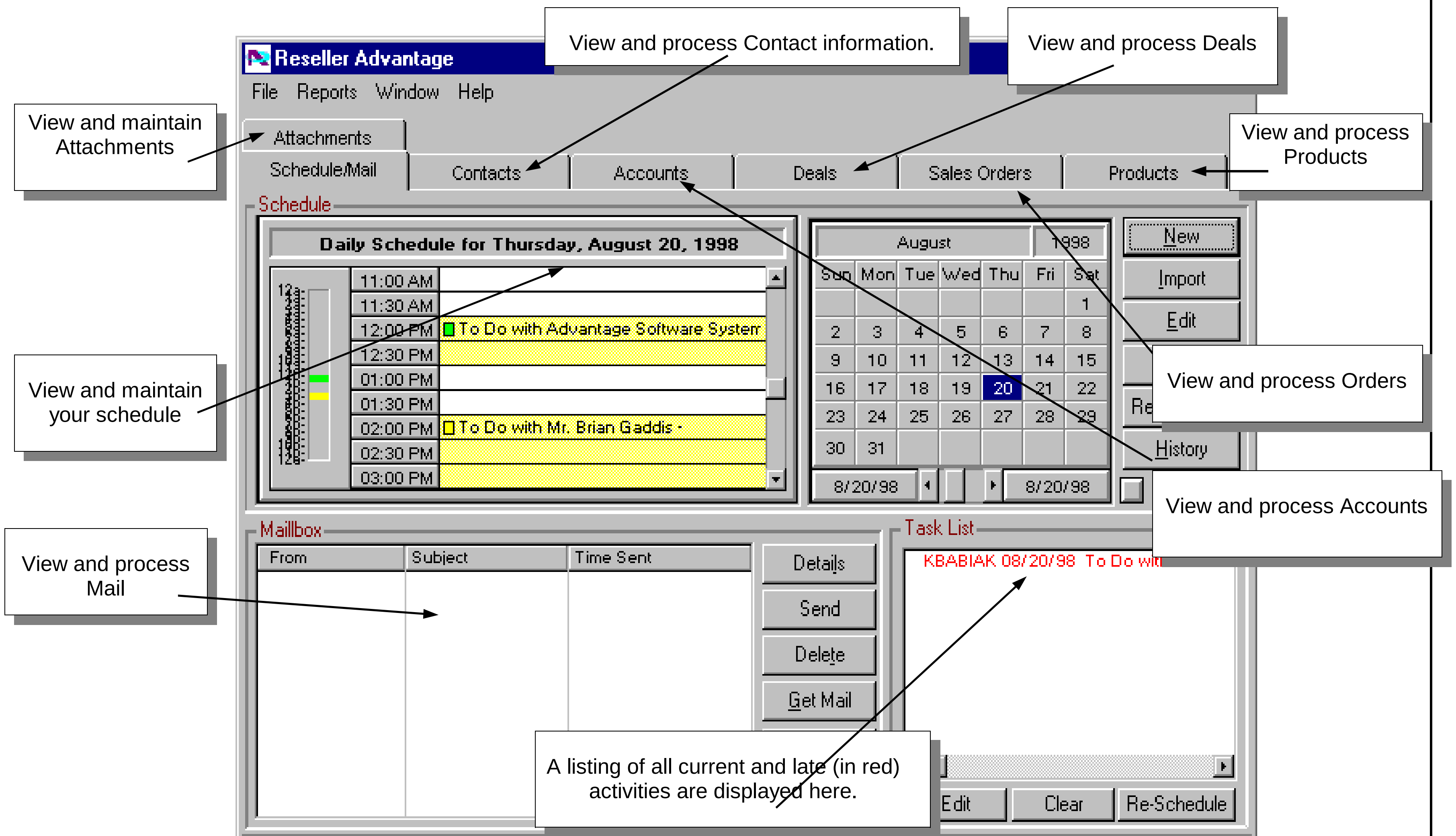
The Access Local Database checkbox allows you to process deals while on the road. Once back at the office all additions and changes are replicated back to the central server

Electronic Mail Setup

During the log-on process you may see a dialog about electronic mail setup, such as the Microsoft Exchange options dialog shown here.

Reseller ADVantage interfaces to MAPI standard electronic mail systems, if you have mapi installed on your machine you may get this type of screen. Click OK for access to your mail from within Reseller ADVanatage.

This is the first menu presented when ***Reseller ADVantage*** initializes. It gives you a window into every part of the sales and order fulfillment process without having to leave the system. Clicking on the major tabs at the top of the window opens the other main windows.



The scheduling area of the Main Menu contains a listing of the *selected* day's (displayed in dark blue) activities in 1/2 hour increments.

To Add an Activity

1. Select the day

2. Double-click on the time you wish it to start.

3. Type in the activity.

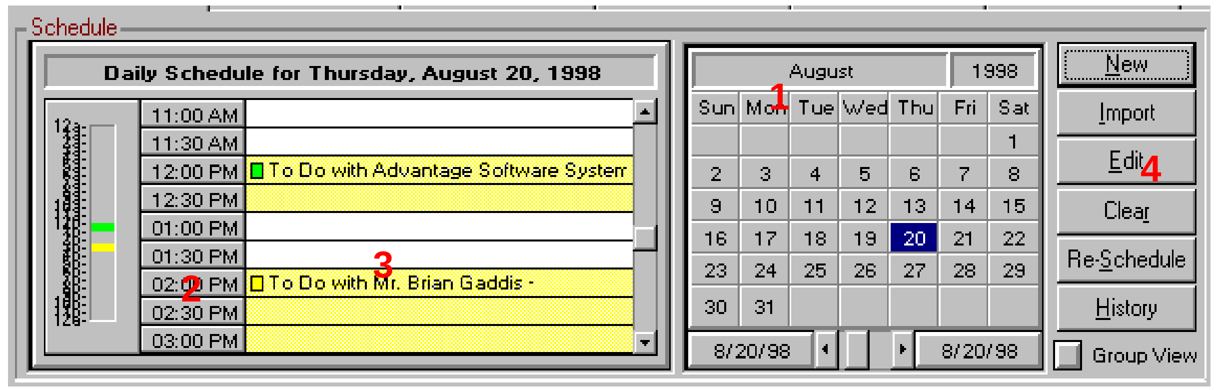
*(Note: you may extend the time allotment by double-clicking on an item, placing the cursor on the bottom line, and "dragging" it down to cover the desired amount of time. To move it within the same day, double-click on the item and "grab" it by the top line, moving it where you want it. To change days, highlight it and click **Re-schedule** on the right.)*

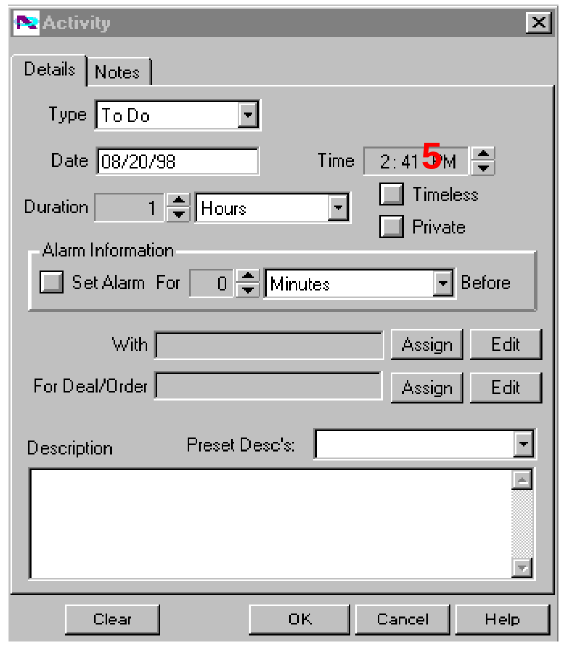
-- or --

4. Click **New** for a new activity, or select an existing activity and click **Edit,** the Activity box opens. From this box you have additional options, such as assigning a contact, adding notes, setting duration, etc.

By clicking **Clear,** you can remove an activity. A box opens allowing you to specify it's completion status and to add/update any comments.

Clicking **History**, opens the Sales Person History box.

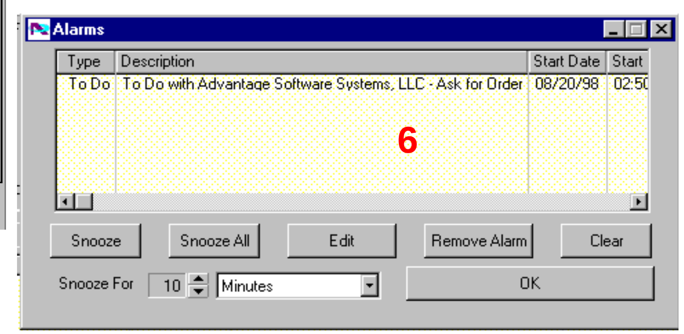




Checking **Group View** enables you to view activities for everyone in your group.

5. When an activity type of Lead or Problem is selected you are allowed to select the sales rep who will be assigned the lead or problem. The selection list includes all of the assigned account division sales reps with the signed on user set as the default.

6. The alarms dialog is displayed whenever an activity with an alarm is past. From this box you can view/edit the activity, remove the alarm, clear the activity or snooze it.



Reseller ADVantage©

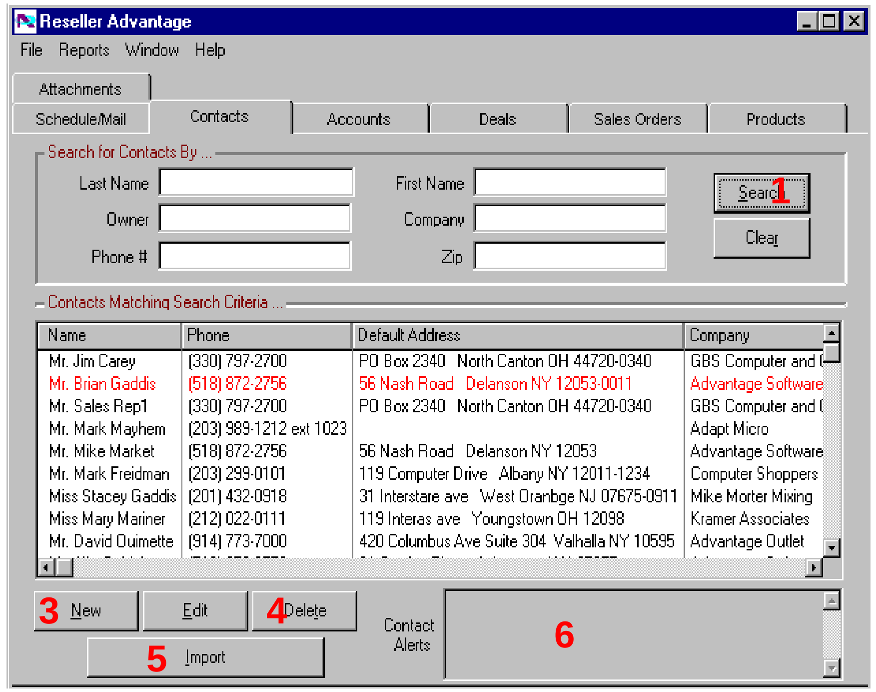
Sign-On, Schedule and Mail Feedback Page

Concerns and Suggestions

From: ***Date:*** ***Please fax to (518) 872-9137***

Company:

Contact Management



Ownership is an important concept (in the multi-user version), and is also used with Deals and Accounts to establish access and modification rights. For example, if you are assigned (you own) a contact you have the ability to change key information like address, customer name, etc. Otherwise, changes are not allowed. You are allowed to view the information, create comments, schedule tasks and start new deals.

1. Searching for Contacts

To find a contact, enter either first or last name, the owner, what company they work for, all or the first part of their phone number (e.g. area code), and/or ZipCode. All of the contacts matching your search criteria will be displayed.

If you do not enter any criteria, you will be asked to confirm viewing all contacts. If the number of contacts found is greater than your format limit you will be asked if you want to narrow your search.

2. Editing Contact Information

To view and change contact information, search for and select contact then click **Edit,** or just double click on the selected contact. The Contact Processing Screen will open with the selected contact's information displayed. If you are not the owner or not part of the group that owns the contact, you will only be allowed to view, not change information or delete the contact.

3. Adding a New Contact

To add a new contact simply click **New,** the Contact Processing Screen will open, enter new contact's information.

4. Deleting a Contact

The system can be set so that only contact administrators can delete contacts. If this is not set then you may delete contacts if you are the owner. Search for and select contact and click **Delete**.

5. Adding Contacts from other Systems

It is likely that you use another contact manager like ACT!. If so, just click **Import** to start the import process. Using the Find ACT Contacts screen (see following page), you can search for contacts either on your PC or within your networked environment.

Reseller ADVantage can also import contacts from comma delimited files. After clicking **Import**, locate the file using **Browse**, select your option, then click **Finish**. A box opens showing you the status of your import.

We encourage you to use the Contact Management features in Reseller ADVantage to keep you and the rest of your company updated with your contacts' sales activities.

6. Contact Alerts

When you click on a contact's name, all contact alerts are displayed here. These alerts can be posted by anyone, e.g. the District Manager, etc.,so it is important to re-synchronize your system with the central server at least daily.

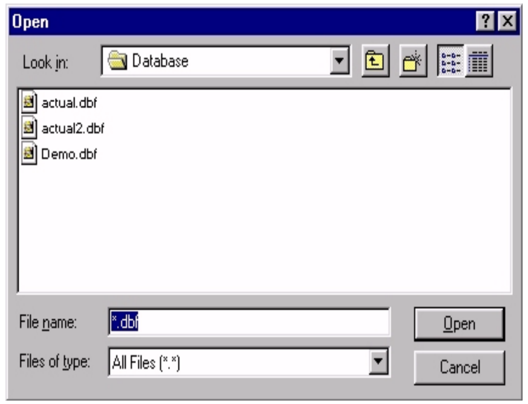
Should you wish to import contact information from an ACT source, click **Import** on the Main Contact Search Screen, this dialog opens.

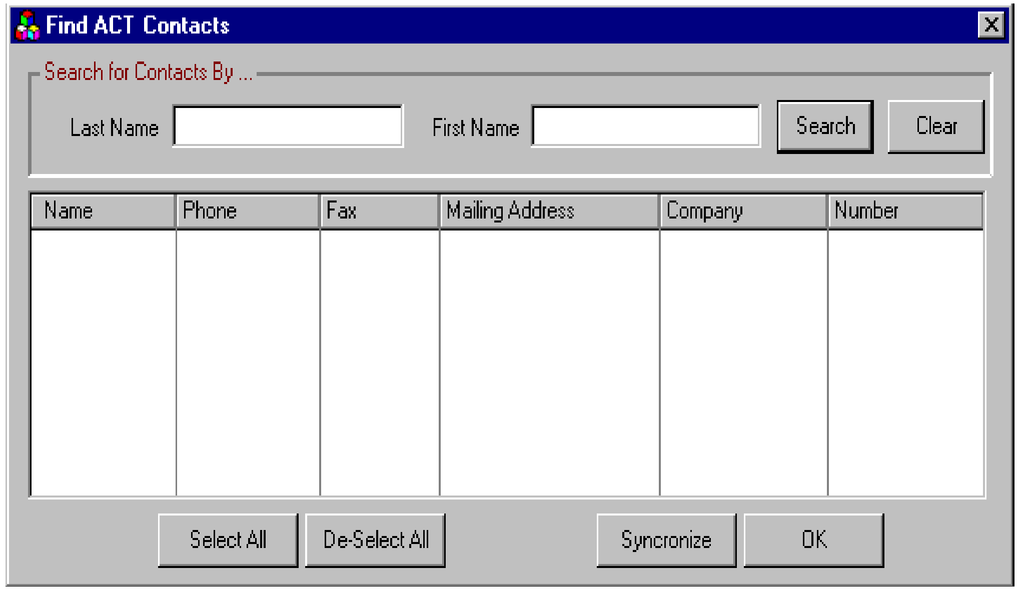
Identify the name of the database containing the contact information and click **Open.**

The Find ACT! Contacts screen opens.

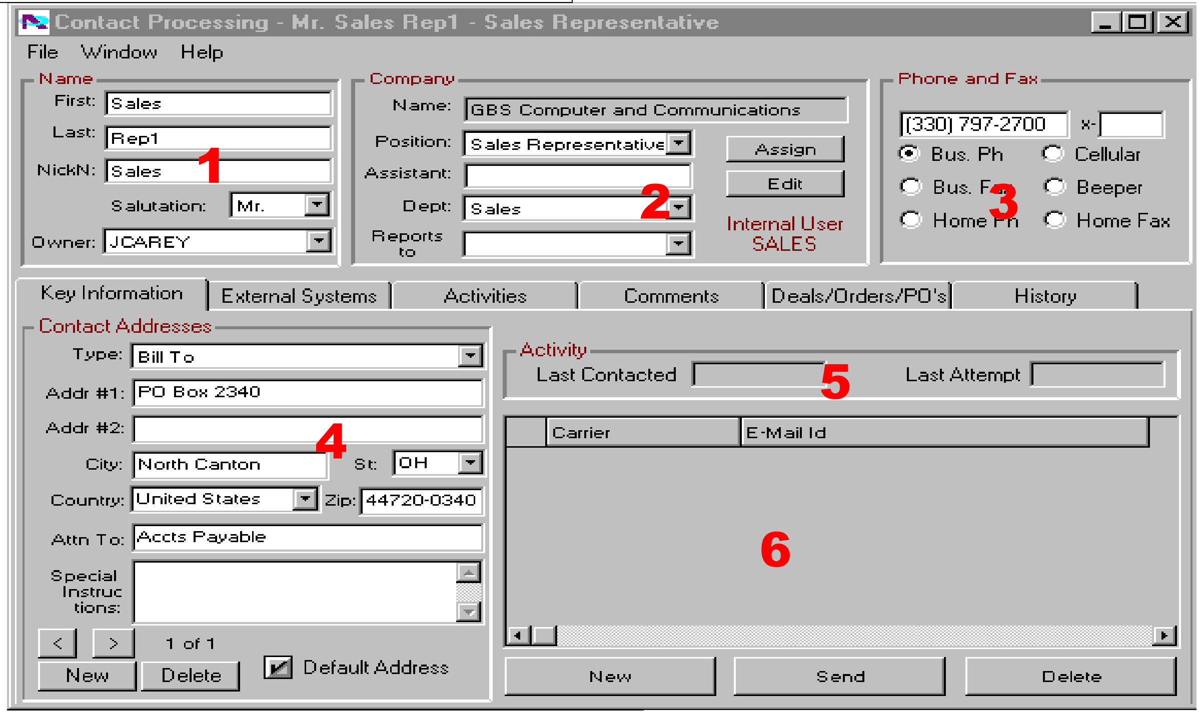
Clicking on **Search**, activates the search function, and all matching contacts are selected. Once you have located and selected all the desired contacts, click on **Synchronize**, and the information is extracted and loaded into ***Reseller ADVantage.***

For each selected contact you will be asked to confirm the add or update of the reseller contact information.





Contact Processing Screen



One of the most powerful features of ***Reseller Advantage*** is it's in-depth integration, which becomes more apparent when viewing screens like the Contact Processing Screen.

*Just like other contact managers, company, phone numbers, meetings, and addresses are maintained. What is **also** kept is all data concerning previous and current quotes, orders and deals. This means that "At-A-Glance" you can review **every** call, meeting, proposal, order, problem, etc. associated with this contact, whether it had to do with you or not.*

The Contact Processing Screen is the window to all current and past information about each of your contacts. It contains a top section that is always visible which includes basic account information, and a lower tabbed section for viewing and processing additional contact information.

1. Name - This contains the contact's name, nickname, and salutation. When creating a new contact the owner is set to the signed-on User's Id.

2. Company - Contains the name of the company the contact works for, their position, secretary, department and who they report to. (Report to is filled in with the names of all the contacts that work for the assigned company)

3. Phone and Fax Numbers - This section holds all of the current important phone numbers.

Key Information Tab

4. Addresses - This is where business and home address information is kept. Different address types can be added by your administrator.

5. Activity - Last Contact and Last Attempted Contact date.

6. E-Mail - Holds unlimited E-Mail Addresses and their carrier.

Changing Contact Information

If you are authorized to make changes to a contact, all fields will be unprotected and will allow you to type in it (otherwise all fields will be protected). Since all contacts are stored in Reseller ADVantage with a control number, even the name can be changed if necessary, to support name changing. That way you can track a contact's history throughout their entire life if necessary.

Changing a Contact's Company

Click **Assign,** in the Company section, the Account Processing Screen opens up (see Account Processing). Locate the new company (or add a new one), and select that company. You will return to this page with the new company's name in the company field.

External Systems Tab

1. External Systems

Each Contact whether internal or external has access to certain systems including Reseller ADVantage. If you have user administration security this tab will be displayed.

To add a system, click **New**, and a new entry will be added to the table where you can select a system and the assign a user-id and password.

2. Reseller Advantage Security

For Reseller Advantage you can assign security access, assign them to a group, set the approval amount and assign them a marketing region.

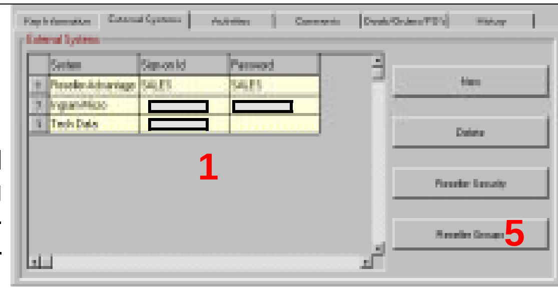
3. Activities Tab

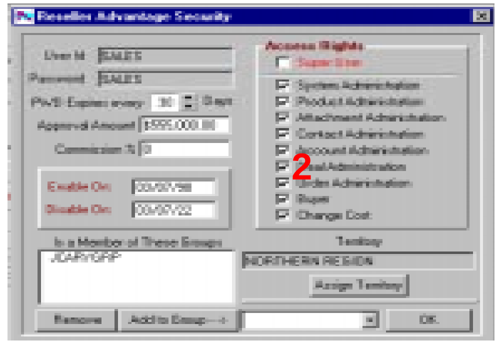
Contains a listing of all of activities associated with this contact. Clicking **Edit,** will open the highlighted activity to be viewed or edited in the Activity box. If you are not the owner fields will be protected and you will not be allowed to clear it.

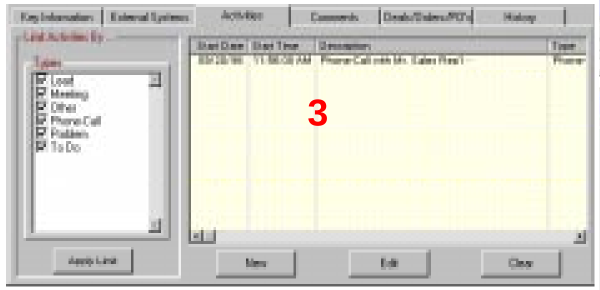
To add an activity, click **New**, and the Activity box will open with the Contact's name entered.

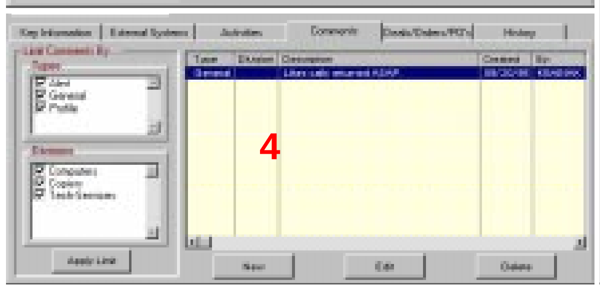
4. Comments Tab

The comments area displays a one line description of comments about this contact.







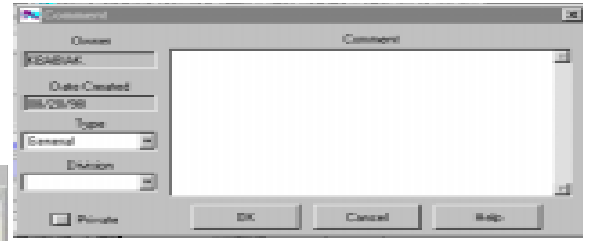


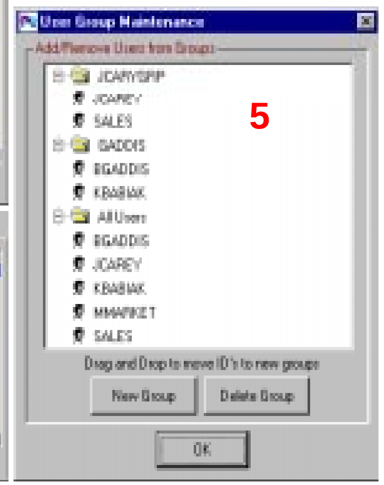
To add a comment, click **New,** the Comment box opens. Here your pick the comment type and add the comment.

To view or edit comment, click **Edit**, the Comment box opens.

To delete a comment, highlight it and click **Delete.**

If you are not the comment owner all fields will be protected and you will not be allowed to edit or delete it.

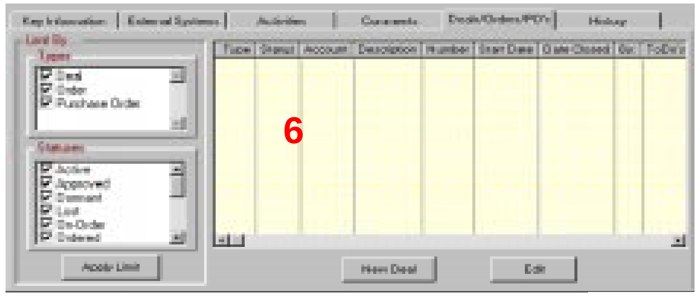




5.Reseller group id's are maintained from this box. Using drag and drop you can move users from group to group. The all users group contains all users that are in the system. This allows you to assign a user to multiple groups.

6. Deal Information Tab

This displays a one line entry for every deal, order or purchase order that the contact has been involved in. There can be many internal and external contacts associated with a deal. For example, there might be 3 or 4 people involved in the Customer company, a VP in your company who must approve the bid, and one or two other sales people involved. Each of these contacts will be recorded as part of the deal and their role in it.



Starting a Deal

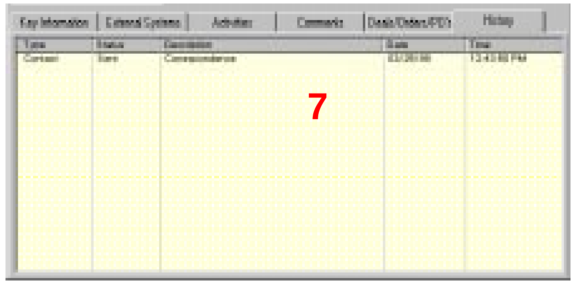
To start a new deal with a contact, click **New Deal,** the Deal Workbook will open with that Contact's name and company entered.

Viewing and Changing a Deal

To view or process an existing Deal, Order or Purchase Order:

Select the item, and click **Edit.** The Deal, Order or Purchase Order Workbook will open with the item displayed.

For Activities Comments and Deals you can limit the list by selecting the desired types, status's and divisions in the view area and clicking **Apply Limit.**



7. History Tab

Every key activity (contact created, meeting held, etc.) is recorded and will be displayed here. This will provide you with a detailed timeline of all contact activites.

Contact Management Feedback Page

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