SideKick365 xRM Ultimate

The BEST Sales Maximizing App for SharePoint

User Guide

V2.6

Conceived and Created in California, USA

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Introduction

SideKick365 xRM Ultimate is a new SharePoint App that helps you manage your sales pipeline and customer relationships. It harnesses all of the power of SharePoint and will help you maximize opportunities and close more sales. SideKick365 installs in a few minutes into Office 365 or your SharePoint farm, transforming SharePoint from a collaboration tool into a sales maximizer.

SideKick365 xRM Ultimate is very full featured and includes all of the following:

- Leads – This is a simple module that lets you start targeting where you want to spend your time and store contact information. Leads can be promoted to an Account if the lead turns into something you want to pursue.
- Accounts – Accounts can be classified as needed including Prospects, Customers and Cold. Each Account can have many associated Opportunities, Tasks, Notes, Contacts, Projects, and Documents.
- Opportunities – Opportunities track sales opportunities that are associated with a specific account. Opportunities can have their own Tasks, Notes and Documents.
- Tasks – Tasks are associated with Accounts and Opportunities. They are "to do's" and help you stay on top of things that need to get done.
- Notes – Notes are also associated with Accounts and Opportunities. They are useful ways to share freeform information with everyone working with that account or opportunity. They can also store a hyperlink to important web addresses and support reminder emails set on a specific date.
- Contacts – You can attach contacts to an Account, Opportunity or Project and bi-directional synch is supported with Outlook Contacts.
- Documents – Documents include emails, Office documents, digital scans, and any file that you want to associate with an account or opportunity.
- Categories – This is a list that is associated with documents. It allows you to create categories that you use to tag documents so they are easier to find and share.
- Profiles – This is a list of security profiles that limit who has Edit or Read-Only access to Accounts, Opportunities, or Contacts. Only users that have been assigned full control can manage and create these profiles and assign them to Account, Contacts, and Opportunities.
- Reports – Prebuilt graphical reports to show you sales and opportunity pipeline.
- Campaigns – Allows you to create and manage outgoing email campaigns
- Projects – Project are used to manage a lot of information around a specific topic. Projects can be used to manage consulting projects, customer incident tickets, loan files, events…   you name it
- Spread – You can spread the value of an opportunity over many days, weeks, months or years and build a great pipeline report using the spread capability in Opportunities
- Products – You can track Inventory or services using the Products module
- Outlook and Office Integrations - Deep Integration with Outlook, Word, PowerPoint and Excel.

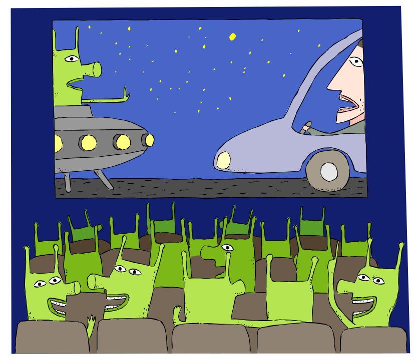
Learning to use SideKick365 xRM Ultimate

While SideKick365 xRM Ultimate is very feature rich, it is also intuitive and easy to use. You can start using it within a few minutes. It's easy to add new accounts, opportunities, tasks, projects and contacts and this guide and our accompanying videos will explain all you need to know to start managing your pipeline and close mores sales - fast.

We have created a number of videos to help you quickly see how SideKick365 works and quickly understand it can help you start maximizing your sales opportunities today. We have also created a sample instance of SideKick365 xRM Ultimate that you can log into to see how the system behaves when it is loaded with data and running in Office 365.

Video Break

We suggest you take a break from this guide and watch the following videos on our website locate here: http://www.skylitesystems.com/Pages/SideKick365xRMUltimateVideos.aspx



Video 1 and 2– SideKick365 xRM Ultimate - Overview – This is the first video you should watch. The video includes a nice overview of SideKick365 xRM Ultimate and some solid examples of how the App can help you get organized and close more sales.

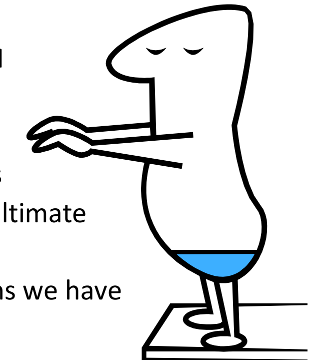
Video 3 - SideKick365 xRM Contact Synch with Outlook - SideKick365 xRM Ultimate now includes bi-directional synching of Contacts with Outlook. This video explains how the synch works and shows contact synching between Outlook and SideKick365 xRM Ultimate. Best of all, you don't need anything more than SharePoint, Outlook, and our SideKick365 xRM Ultimate app to get in synch today!

Video 4 – Office Add-ins – This video shows you how our Microsoft Office add-ins for Outlook, Word, PowerPoint, and Excel will help you integrate your emails, files, spreadsheets and PowerPoint files into SideKick365 xRM. Note – these add-ins are included with your purchase of SideKick365 xRM Ultimate but they require installation on your PC. Your admin will set up these add-ins using our add-in installation guide.

Video 5 - Project Module Overview - SideKick365 xRM Ultimate - Projects are powerful ways to manage a collection of files, notes, tasks and people surrounding a topic or initiative. Projects can be used as Case Management, Project Management, or General Collaboration E-Rooms. Projects can have security applied so you can limit who can see or access them using a Security Profile in SideKick365 xRM Ultimate. Projects can be associated with an Account, an Opportunity, or they can be stand alone. We have seen projects used for everything from Social Worker Case Files, Loan Files, Lease File, Project Files, Proposal Management and more.

Video 12 - Using Templates with SideKick365 xRM Ultimate - This video shows how you can integrate Word, PowerPoint, and Excel templates and OneNote notebooks into SideKick365 xRM Ultimate. This means you can standardize quote forms, meeting minutes, forms, or letters throughout your organization. The video shows how templates are used and takes you step by step through set up using Content Types in the site that holds SideKick365 xRM Ultimate.

Getting Ready to Dive In



Welcome back, we hope these videos helped you get a good overview of how SideKick365 xRM Ultimate works. But wait… there's more! We have also created a training instance of SideKick365 xRM Ultimate loaded with a lot of sample data that you can log into to try out SideKick365. We have sample instances of SideKick365 xRM Ultimate available in 10 languages and 4 localized English versions. We will cover using this sample instance of SideKick365 xRM Ultimate in English in detail later in this guide. Contact us at Info@skylitesystems.com if you want to try SideKick365 xRM Ultimate in French, German, Japanese or any of the other 14 localized versions we have available in our sample environment in hosted in Office 365.

Final Advice before We Begin

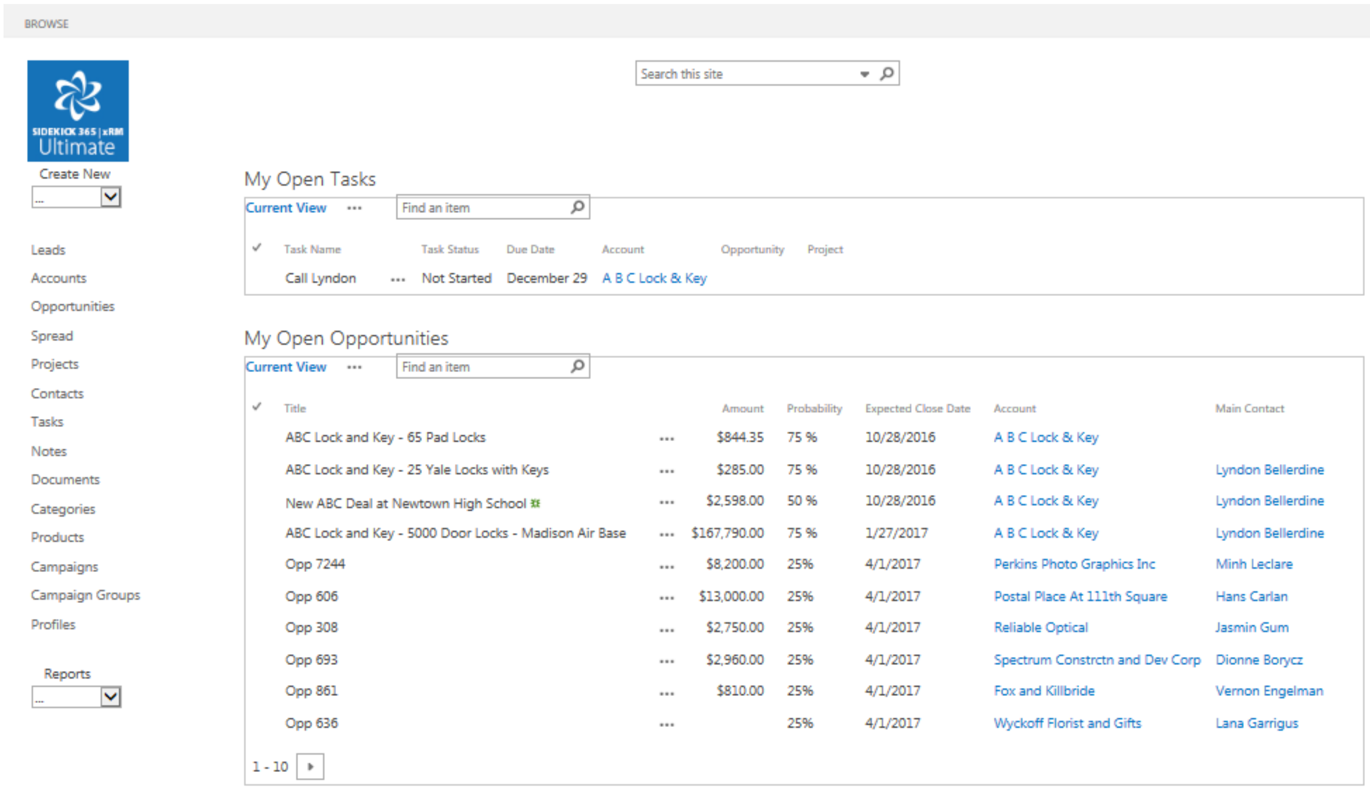
We suggest you read through this manual, watch some of the suggested videos, and then try the sample provided in this user guide. You can add some Accounts, Opportunities, Projects and Contacts in the sample so you can get comfortable before adding data into your instance of SideKick365 xRM Ultimate.

We hope that you find SideKick365 xRM Ultimate is fast, intuitive, powerful and easy to use. Let's get started….

Section 1 – SideKick365 xRM Ultimate - an Overview

Using SideKick365 xRM Ultimate

SideKick365 Ultimate is browser-based so once you type in the web address of your App, you always start working with the App from the Home page. The Home Page lists the open Tasks and Opportunities that are assigned to you and includes navigation to move around the App and also create new data. A sample Home Page of SideKick365 xRM Ultimate with some data running in Office 365 is shown below:



A Quick Lap around the Home Page

The Home Page shown above contains a number of important elements that form the backbone of SideKick365 xRM Ultimate. You will notice the home page is centered on lists filtered to show all open Tasks, Opportunities, Accounts, and Projects that are assigned to you. You will soon learn that lists that allow sorting on any column simply by selecting the name of a field header. You can search for items using the "find an item" control and wildcards searches (the *) are supported – so it is easy to find what you are looking for. You can also filter results by selecting any of the headers and selecting the appropriate checkbox. Best of all, you have all the power of SharePoint at your fingertips, so you can create new views or kick-off workflows if desired.

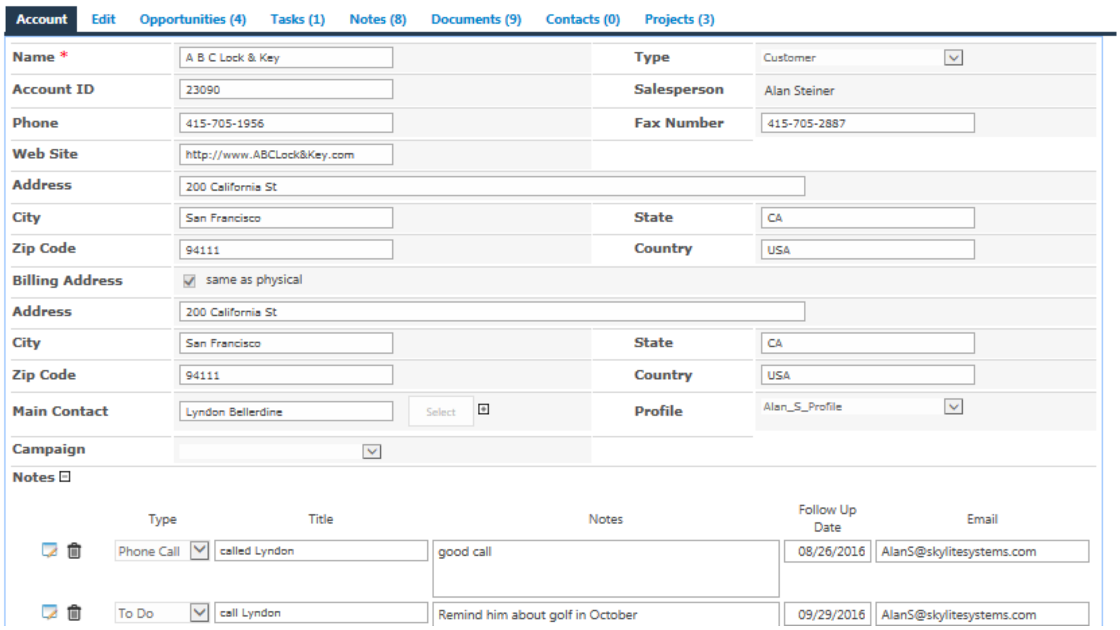
The left-hand gutter of the page contains the navigation to other modules within SideKick365 xRM Ultimate. You can create a new Account, Opportunity, Contact, Task or Note by selecting the dropdown under the "Create New" and selecting the appropriate option. You can always return to the homepage by selecting the SideKick 365 xRM logo. Finally, you can search the site globally by entering a value in the Search control at the top right hand side of the page. As mentioned previously, wildcard searching is supported by using the asterisk symbol (*).

Tip – SideKick365 xRM Ultimate is built on top of SharePoint and can run in Office 365 or on-prem. That means it is easy to customize and it can scale to meet your needs.

Now that we have taken a look at the Home Page, let's dive into the main modules of SideKick365 xRM Ultimate.

Accounts

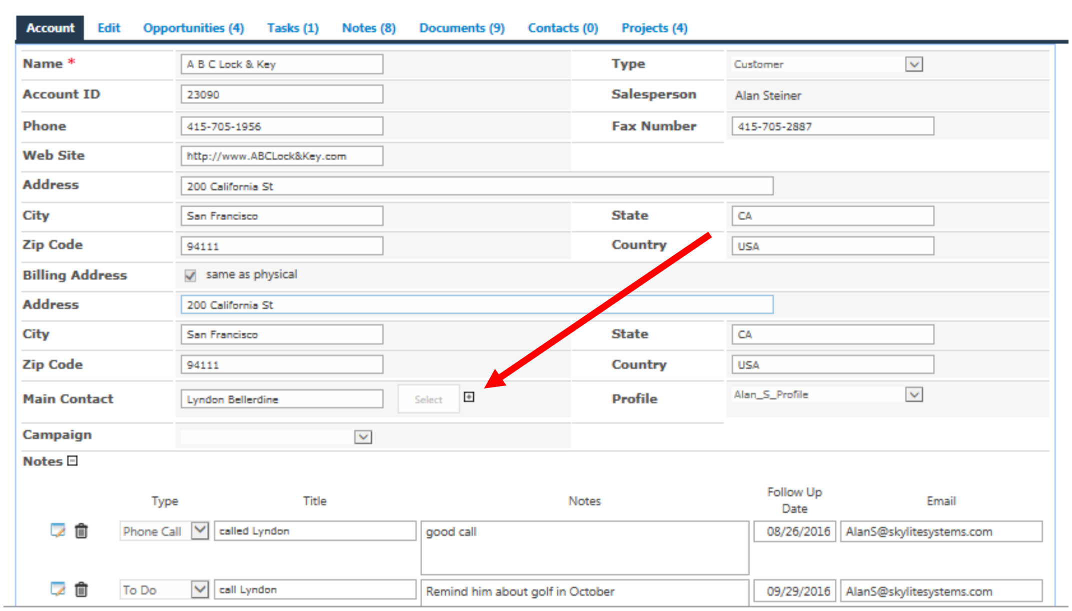
The Accounts module contains all Leads, Prospects, and Customers you are tracking in SideKick365 xRM Ultimate. The distinction between a Lead versus a Prospect or Customer is up to you. It is a simple field called “Type” that lets you choose from a list of dropdown values – you can also easily define new Types to show in the dropdown. A screenshot of an Account follows:



You will notice a number of entries across the top of the Account screen. These are navigation aids that let you jump to lists of associated Opportunities, Tasks, Notes, Documents and Contacts. The tabs also display the number of items in each list that are related to the current Account.   The fields shown on the account screen are self-explanatory. Only the Name field is required (as shown by the red star next to the name) – all other fields are optional.

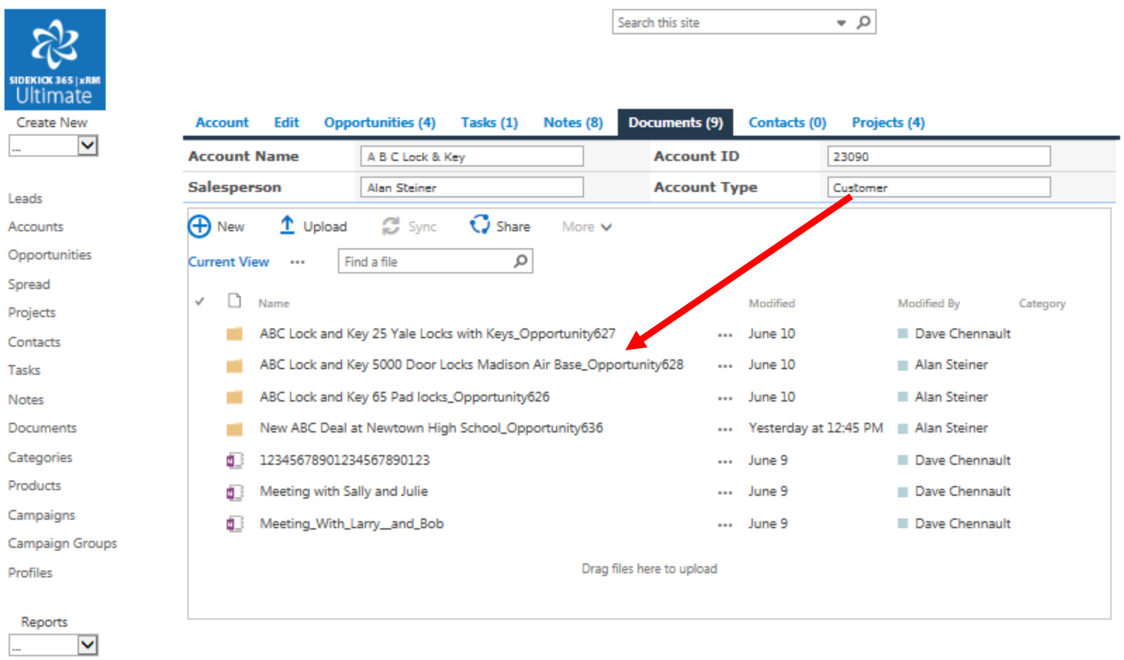
Tip – The Account screen can be customized to meet your needs. Contact us at Info@skylitesystems.com if you want to add fields or functionality and we can work with you to make this happen.

As you can see, the Account screen has a lot of information about a company or an organization you are working with. It contains the location, billing information, and a main contact associated with the account. Note - selecting the plus sign next to the Main Contact field opens the detail about the contact as shown below in illustration below.



Now let's select the Documents tab to see how these tabs work. In the screenshot below, the Documents tab has been selected for the Account ABC Lock & Key.

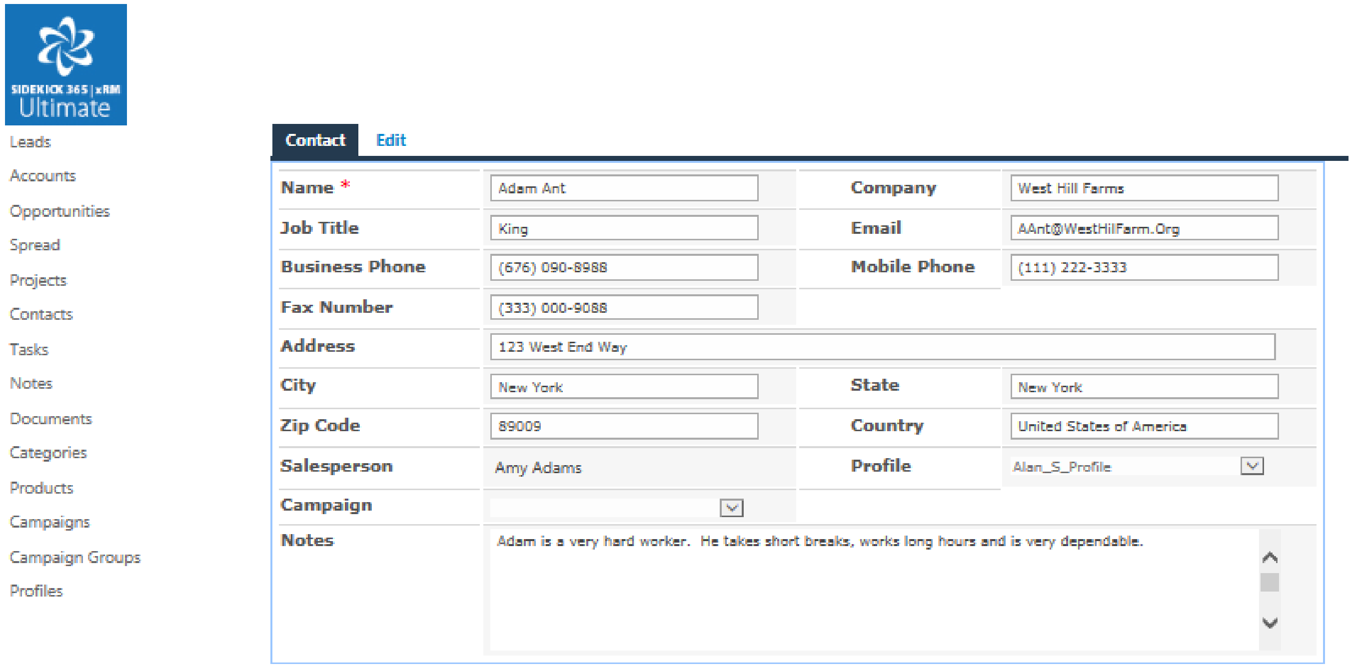
Take a close look at the screenshot below and you will notice folders – some are for Opportunities associated with the account and others were created to using the "New" button. So you can create folders as needed within any of the lists of documents so you can organize the files instead of having a single long list – NICE! You will soon learn that Opportunities can have their own documents as well. This screenshot shows that documents screen within an account lists all of the documents associated with the account AND all of the documents related to all of the opportunities associated with that account. To summarize, the documents tab within the Account module shows all documents directly associated with that account and all of the documents associated with all of the Opportunities that belong to the account.



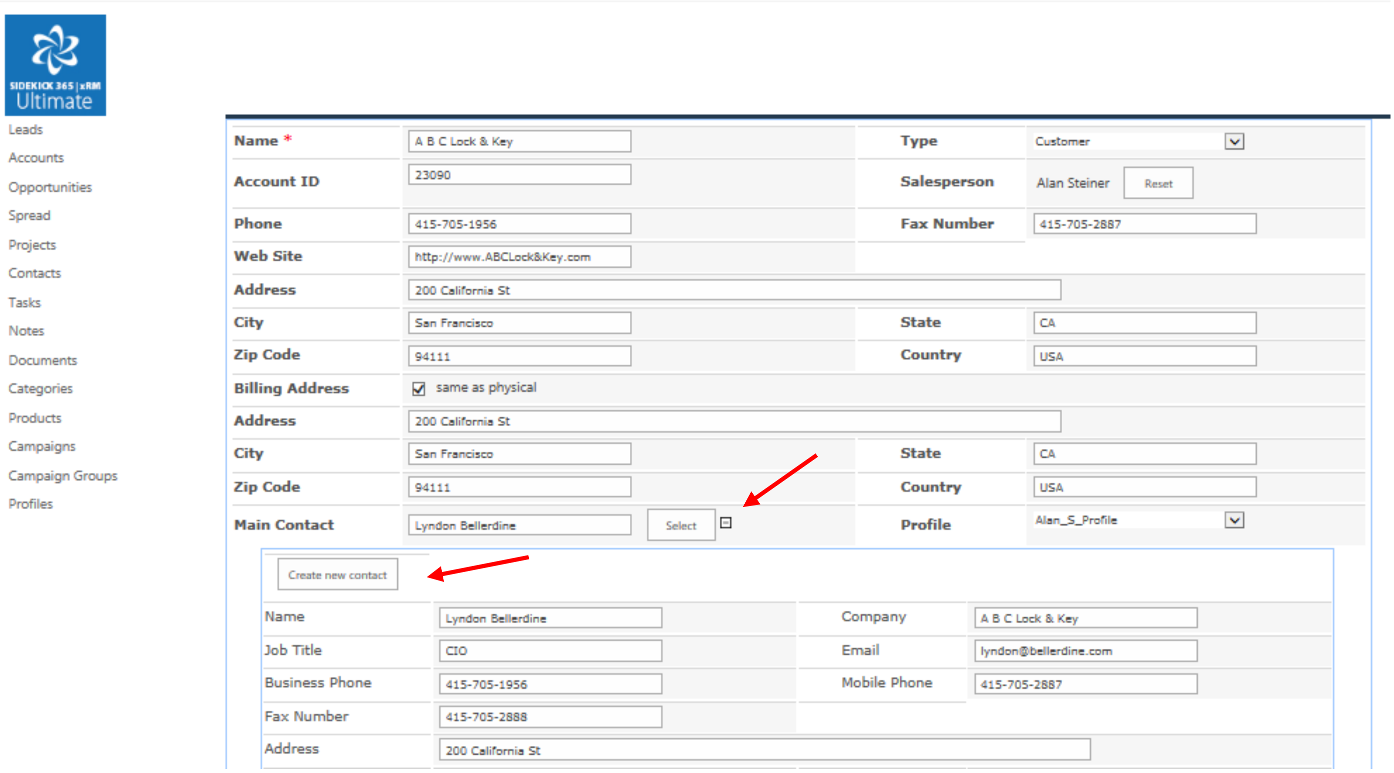
Now let's walk through the other modules in SideKick365 xRM Ultimate. We will next take a look at Contacts.

Contacts

The Contacts module contains a list of people that can be associated with Accounts, Projects, and Opportunities. The screenshot below shows a sample Contact entry.



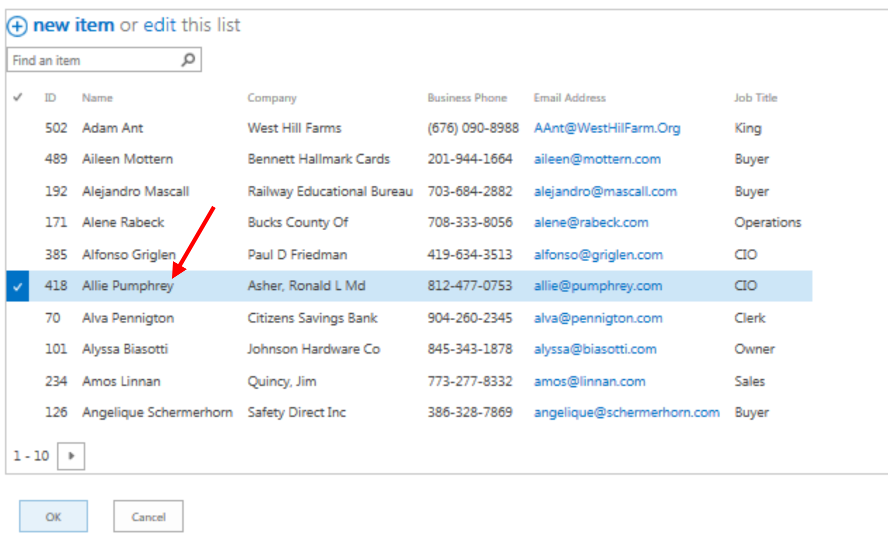
You can associate an existing Contact with an existing Accounts, Projects, and Opportunity or create a new Contact when you create a new Account or Opportunity. To add a new Contact while you are creating a new Account or Opportunity, just select the plus (+) sign next to the Main Contact field and enter the appropriate information and then save the Account or Opportunity and the contact record is automatically created and saved for you.



You can also clear an existing main contact, and add a new Main Contact by selecting Edit tab in the Account or Opportunity record and then hitting the Create New Contact Button as shown above. Hitting the New Contact button clears the Main Contact (but does not delete the record of the Contact in the Contact list). If you type in a new Contact info in the Contact details section and hit save in the Account or Opportunity, then SideKick365 will save the new Contact in the Contact list for you and make the person available when you hit the Select Button.

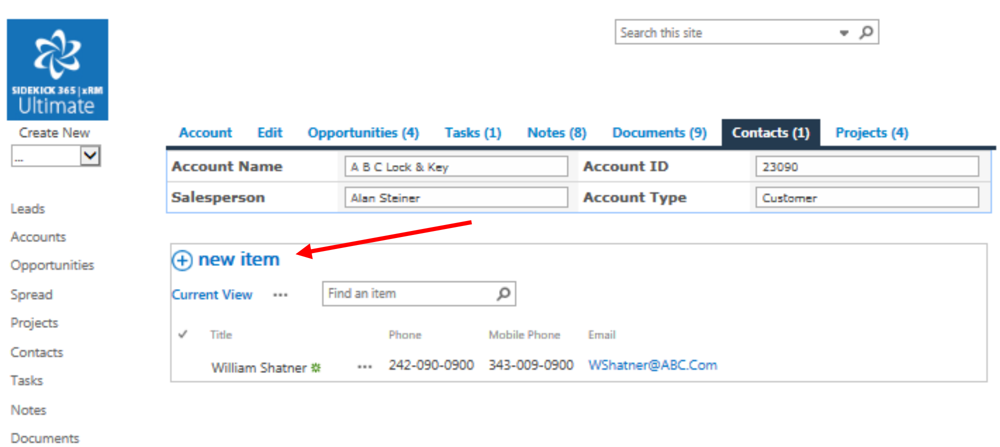
So let's talk about that Select Button…

The Select button shows you a list of available Contacts that you have permissions to view from the Contact list. You can associate any Contact as needed. Filter or search as needed, then select the desired Contact and then hit the OK button as shown below – Make sure to hit any column <u>EXCEPT</u> the checkmark column… hit the name of the contact for example.



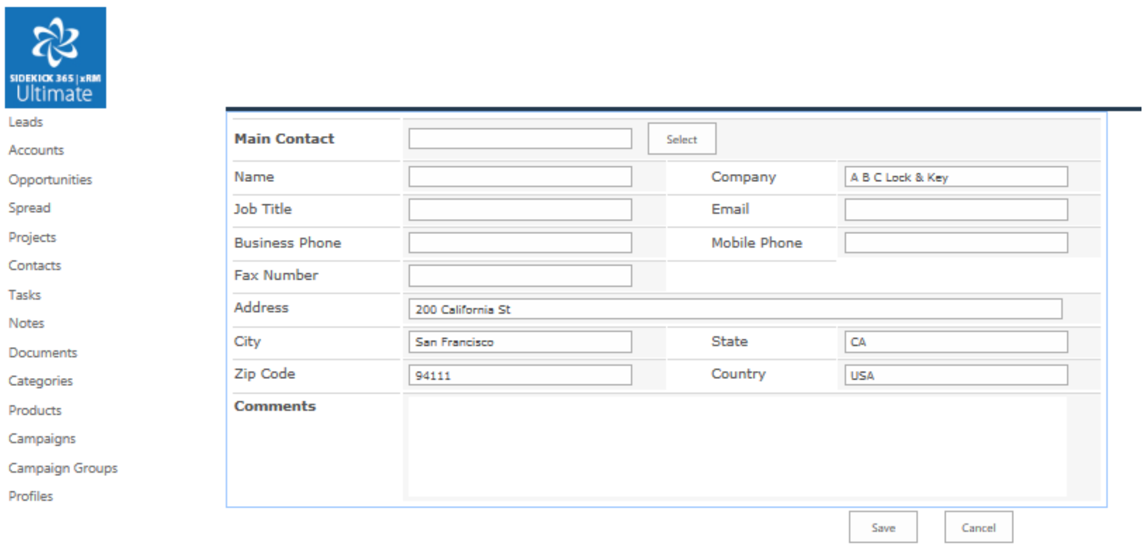
Tip – Contacts do not have to be associated with any Accounts or Opportunities, they can exist only within the Contact module if desired. On the other hand - Contacts can also be associated with many Accounts and/or many Opportunities.

SideKick365 xRM Ultimate lets you associate numerous contacts with an account. You can add an existing Contact to an Account, or create a new Contact from within the account contact module. It is easy to associate an existing contact with an account. Simply navigate to the Contacts tab in the Account and then select the "new Item" as shown below.



Once you selected the new item option, the new contact screen is activated. This screen lets you associate an existing Contact with the Account, or you can create a new Contact that will also be added the Contact module.

The screen below shows the New Contact screen. You can select an existing contact by picking the “Select” button at the top of the screen. If you want to create a new Contact, don’t hit the “Select” button, just enter the appropriate information in the fields on the screen and hit “Save” and a new Contact record will get created and the Contact will be added to the Account. NOTE – the app automatically adds the address from the account – NICE! You can edit if needed but we are always trying to help you work faster and save fat-fingered typing mistakes…



Synching Contacts with Outlook

It is easy to synch the Contacts in SideKick365 xRM Ultimate with your Contacts in Outlook – the app supports bidirectional synching. The steps required to set up synching are covered in the set-up guide for SideKick365 xRM Ultimate so we’ll cover the steps you need to perform to synch in this manual. We also have a great video on Contact Synching on our website. See the video on Synching Contacts here http://www.skylitesystems.com/Pages/SideKick365xRMUltimateVideos.aspx

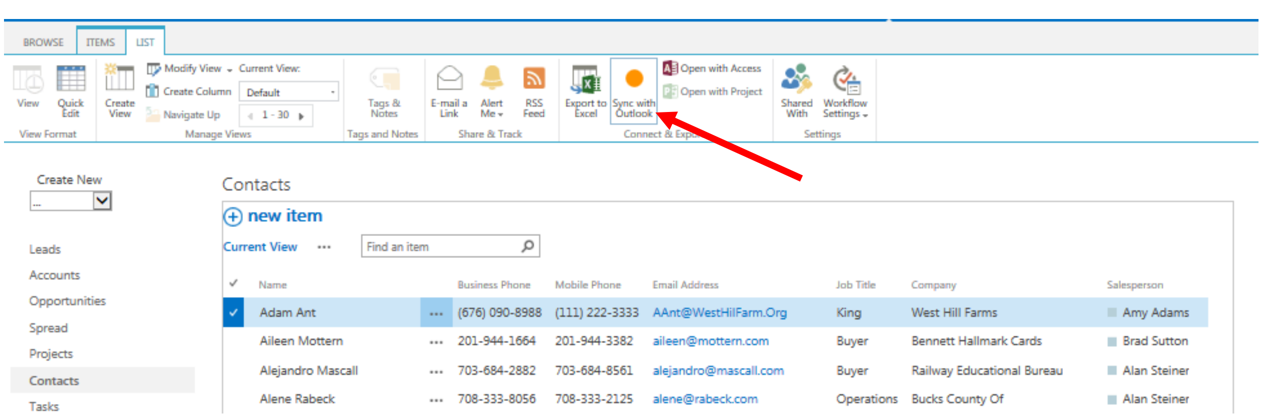
Synching Contacts is easy once you get everything set up, just follow the steps below:

1 – Navigate to the Contacts Module

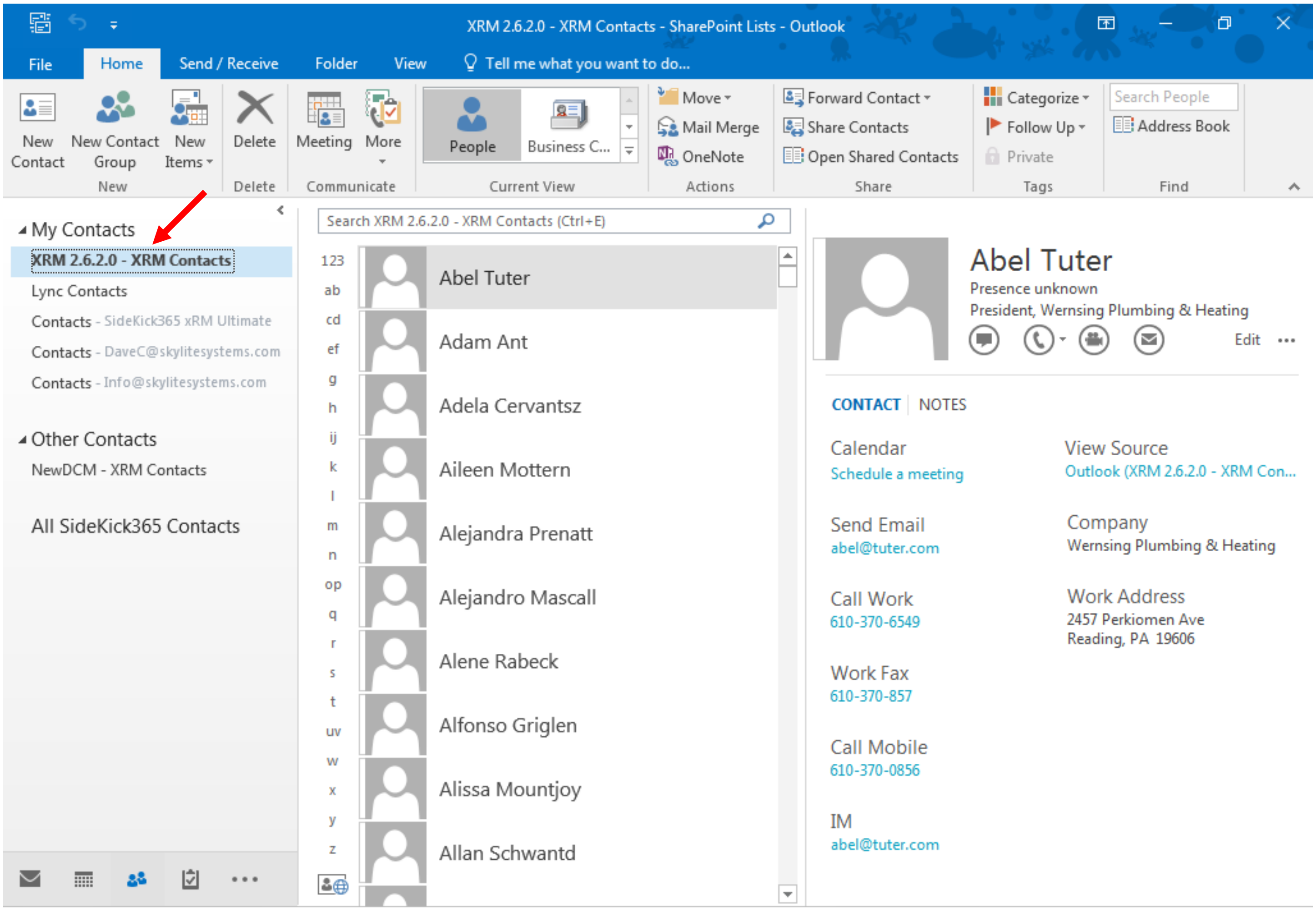
2 – Select any Contact with a single Click on the Checkmark Column

3 – Select the List tab to activate the List Ribbon

4 – Select the Synch Contacts Button as shown below



SideKick365 looks for any new Contacts that were added in the Contacts module in SideKick365 and not sent to Outlook, and it also looks into the folder in Outlook that holds all SideKick365 contacts to see if any new contacts were added into that folder (note you can drag contacts between the contact folders in Outlook).



As you can see, Contacts are very powerful and important in SideKick365 xRM Ultimate. Now let's turn our attention to the Opportunity Module.

Opportunities

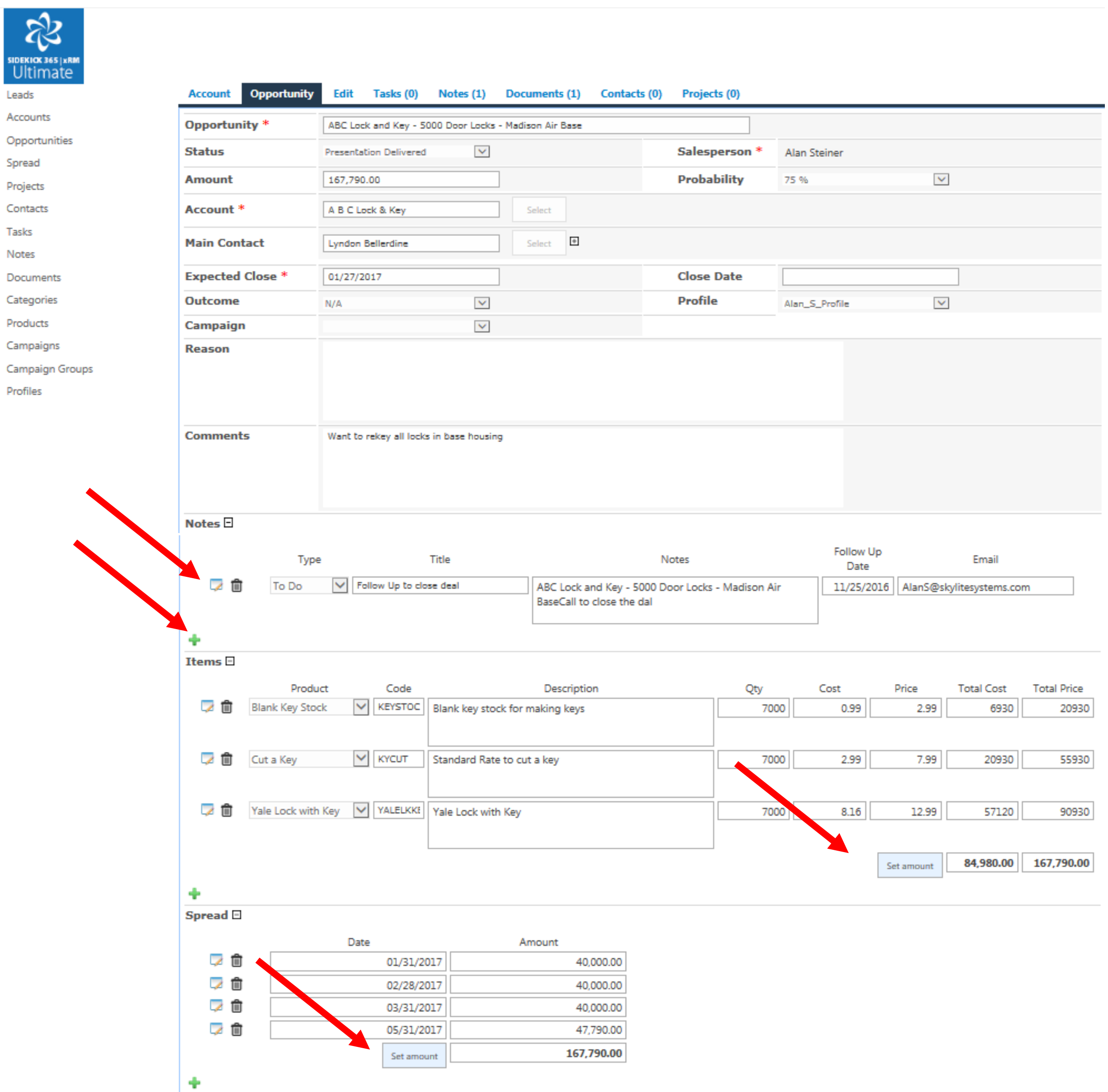
The Opportunity module manages all Opportunities in the system. Opportunities are always related to one and only one Account.

Tip - An Opportunity must be linked to an Account so it is important that you create an Account first, and then add Opportunities to the Account.

You can create an Opportunity two ways:

- You can create an Opportunity within and Account by selecting the Opportunity tab in the account screen and then use the "New Item" option in the list view of Opportunities (as shown below) or
- Create a new Opportunity using the Drop Down under "Create New" in the left-hand side of the Home page.

An Opportunity can have Documents, Tasks, and Notes associated with it. Opportunities can also be associated with an existing Contact, or you can create a new Contact as needed. Notes also have Notes and Items (Products) and the value of the Opportunity can be "spread" over many periods. Let's take a closer look…



Opportunities are easy to set up. Enter in the info around the Opportunity and add in Notes and Products as added. Just hit the green plus (+) button to add in Notes, Items (products) or to Spread the value of the Opportunity across many time periods. You can edit any Note, Item or Spread value by hitting the little pencil icon, and you can delete any by hitting the little trash can.

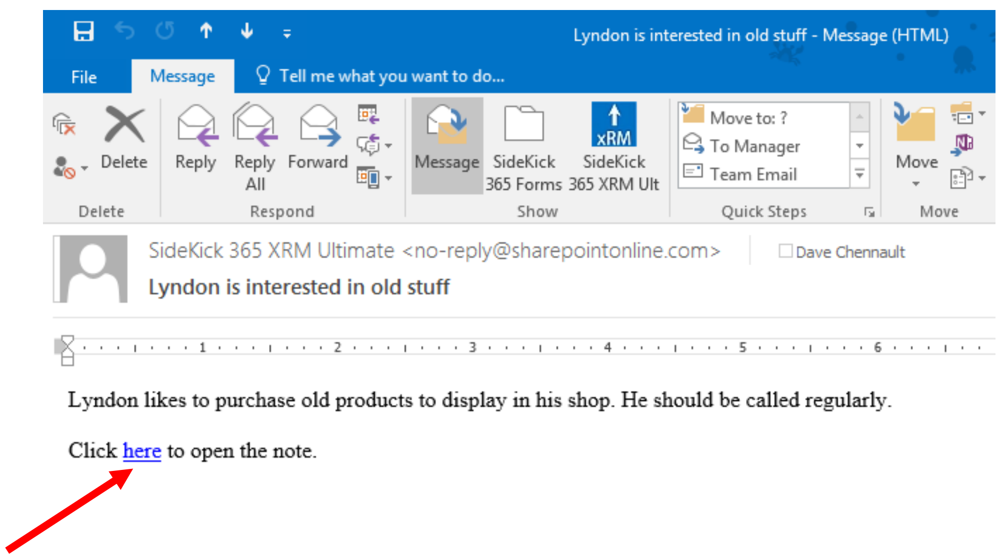
Let's talk about Spread a little more. Spread is great, since you can enter in the details about an Opportunity and then spread the projected revenue of that opportunity across many time periods. Just spread as needed, then you can get a report of the spread value by – you guessed it – going to the Spread module. This means you don't need to put in several Opportunities just because the revenue is realized over many months…. Instead, just enter in one Opportunity and then spread the revenue using the spread function. We are certain this will save you a lot of time, make your pipeline projections reflect actual expected revenue, and help you close more deals.

Tip – If you spread any opportunities, then you should spread all of your opportunities even if there is only one spread period in an opportunity. This will make the reports in Spread accurate. If you only spread some of your opportunities, then you will only get partial data in your spread report – make sense? Email us at Info@Skylitesystems.com if this is confusing .

Notes in Accounts

Notes are also very powerful! You can set up a reminder email by entering in a date and a single email address within a Mote. An email will be sent to the person or Group at 12:01 AM on the date of the note email.

The screenshot below shows a typical email reminder sent by SideKick365 to the Notes recipient. The email contains a link back to the Note in SideKick365, so it makes it easy to stay on top of your game.   It puts the Note title into the title of the email, and the Notes into the body of the Email. It also includes a link back to the Note so you can click on it and easily view the Account, Opportunity, or Project associated with the note.



You can easily build different views and reports to highlight Opportunities that are in various stages of the sales lifecycle and Opportunities will form the basis of all Pipeline reports in the list view in the Opportunities module.

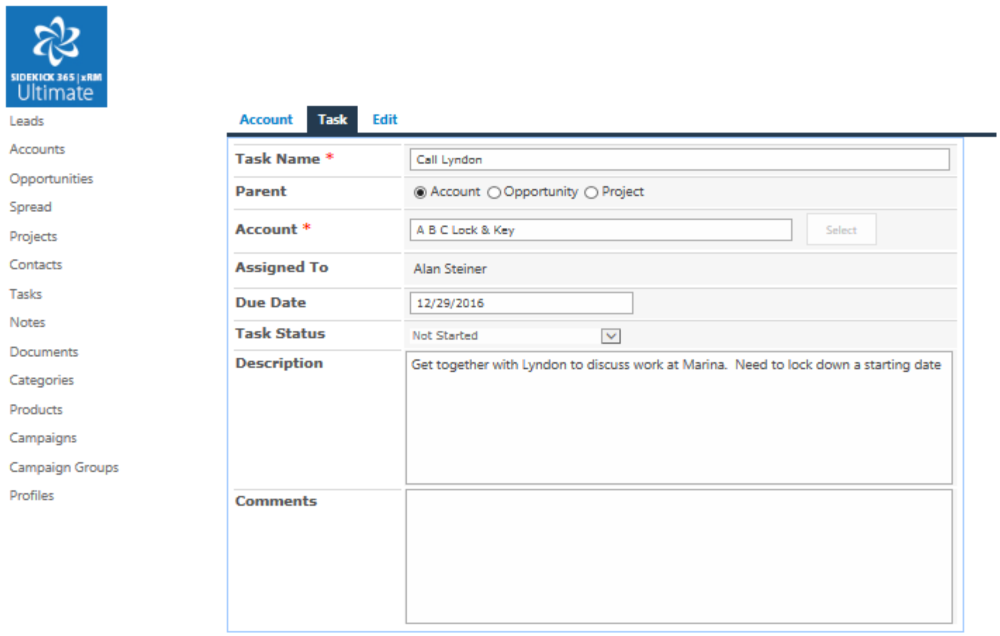
TIP – The Opportunities Module can be customized to fit your business needs. Contact us at info@skylitesystems.com with your needs and we will get in touch to discuss the best way to customize SideKick365 xRM Ultimate to fit your needs.

We've seen the Accounts, Contacts, and Opportunities modules. Now let's take a look at the Tasks module.

Tasks

Tasks are "to do" items. Tasks are a true Task list within SharePoint, so this means they have many capabilities and views available like any other Task list in SharePoint. Tasks are always associated with an Account, Project, or Opportunity. If they are associated with an Opportunity, they will also be associated with the Account that the Opportunity is related to.

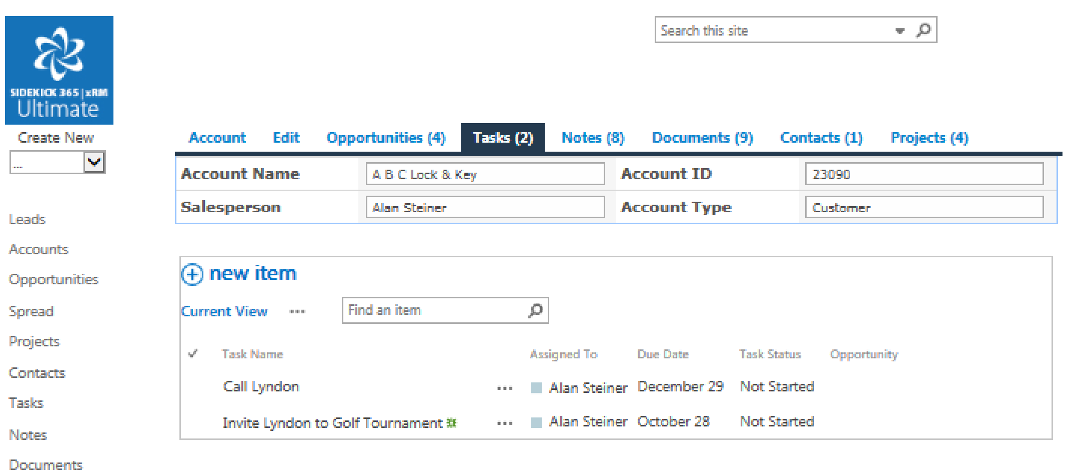
A Task screen is shown below.   Notice you can navigate to the Opportunity associated with the Task by selecting the appropriate tab – in the example below, you can navigate to the Account called ABC Lock and Key by selecting the tab called "Account". A similar Tab called Opportunity or Project would be shown if the Task was associated with an Account or Project.



Tasks are very helpful since they can remind you to perform certain actions like sending an email or calling a Prospect. You can also use Notes in similar fashion – the choice is up to you. Most of our customers make extensive use of Tasks and/or Notes. All Open Tasks that are assigned to you are displayed on the Home page.

TIP – Workflow is available within SideKick365 xRM Ultimate. Workflow can be used to set up reminders and alerts. Contact Info@SkyLiteSystems.Com if you want to enhance Tasks and add more functionality using workflows.

The screenshot below shows Tasks associated with the Account ABC Lock and Key



Documents

The Documents module lets you view all documents associated with Accounts, Projects, and Opportunities. Documents are always related to one Account, Projects, or Opportunity. Documents include a wide variety of file types such as emails, scans, Microsoft Office, or any kind of file allowed within SharePoint.

Add-ins for SideKick365 xRM Ultimate

Two add-ins are available from SkyLite Systems to let you quickly add Microsoft Office files and scanned documents. A short description of each follows:

- SideKick365 xRM Add-in For Office and Outlook – this add-in lets you save Word, Excel, and PowerPoint files into Accounts and Opportunities while working in Office. This add-in is included with your subscription or Purchase of SideKick365 xRM Ultimate. The Office and Outlook Add-ins are included with your purchase or subscription to SideKick365 xRM Ultimate.
- SideKick365 xRM Add-in For Scanning – this add-in lets you scan paper files and documents into Accounts and Opportunities. It works with popular scanners from Kodak and other multi-function devices. This add-in is not included with your subscription or purchase of SideKick365 xRM Ultimate and is available for purchase separately if needed. Email us at info@skylitesystems.com for more information and a quote.

You can see a video that shows you the add-ins in action by following this link. See video 2 here:

http://www.skylitesystems.com/Pages/SideKick365xRMUltimateVideos.aspx

See video 6 on this link to see how the scanning integration works with SideKick365 xRM Pro and Ultimate:

http://www.skylitesystems.com/Pages/SideKick365xRMUltimateVideos.aspx

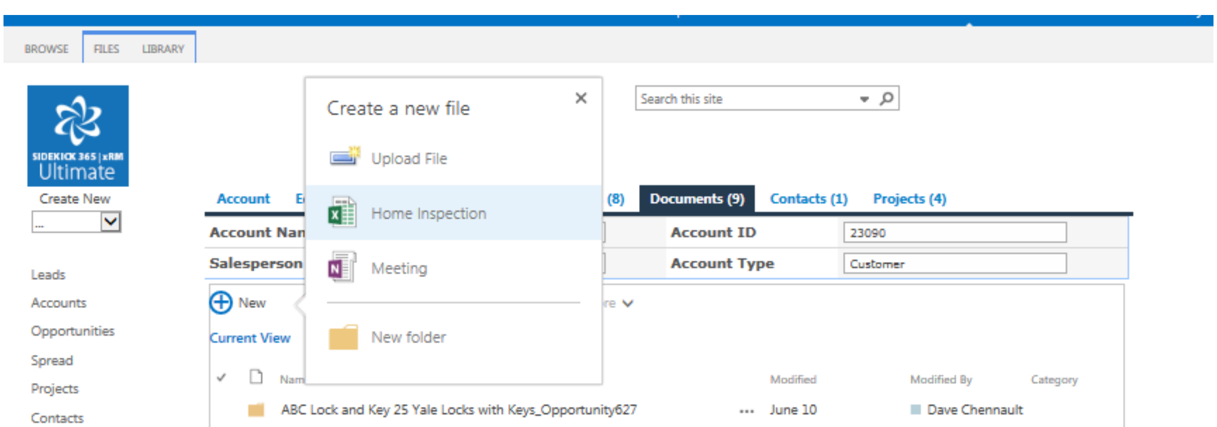
We have a separate installation guide for each of the add-ins. Please contact us at Info@skylitesystems.com to obtain a copy of these guide.

Back to the Document Module….

The Document module is shown below. You can select a file to view it and use the edit properties to edit the metadata associated with a document as needed. You can create Folders to hold similar documents and use templates that you create in familiar apps like Word and Excel. Let's take a closer look.

Documents can be added using the "new item" option within the document list or using the Create New dropdown in the left-hand gutter. You can also add documents using the Scanning and Office add-ins from SkyLite systems.

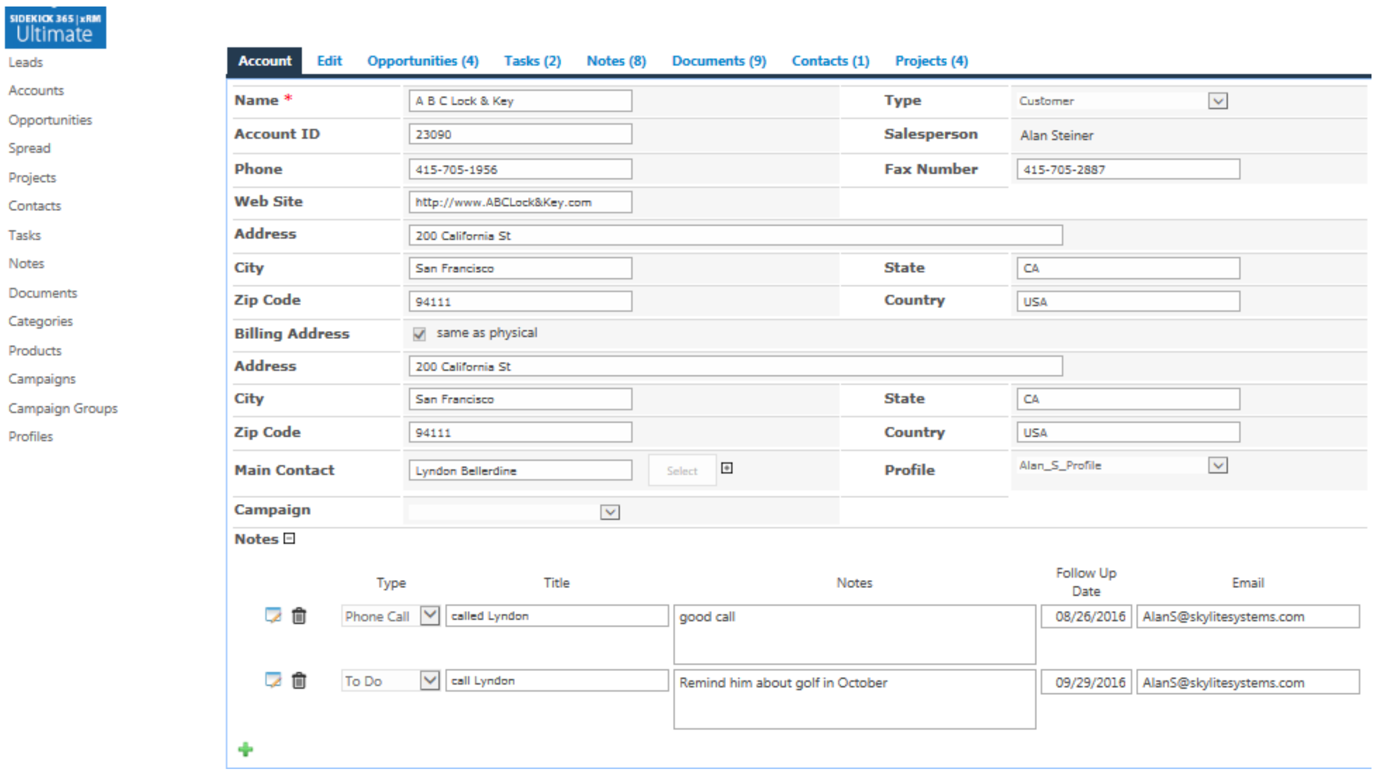
You can also create Templates from Word, PowerPoint, OneNote, and Excel and load them into sideKick365 using a Content Type. We have a great video about creating templates and using Content Types on our website here http://www.skylitesystems.com/Pages/SideKick365xRMUltimateVideos.aspx See the video 12 entitled "Using Templates" for a detailed rundown.



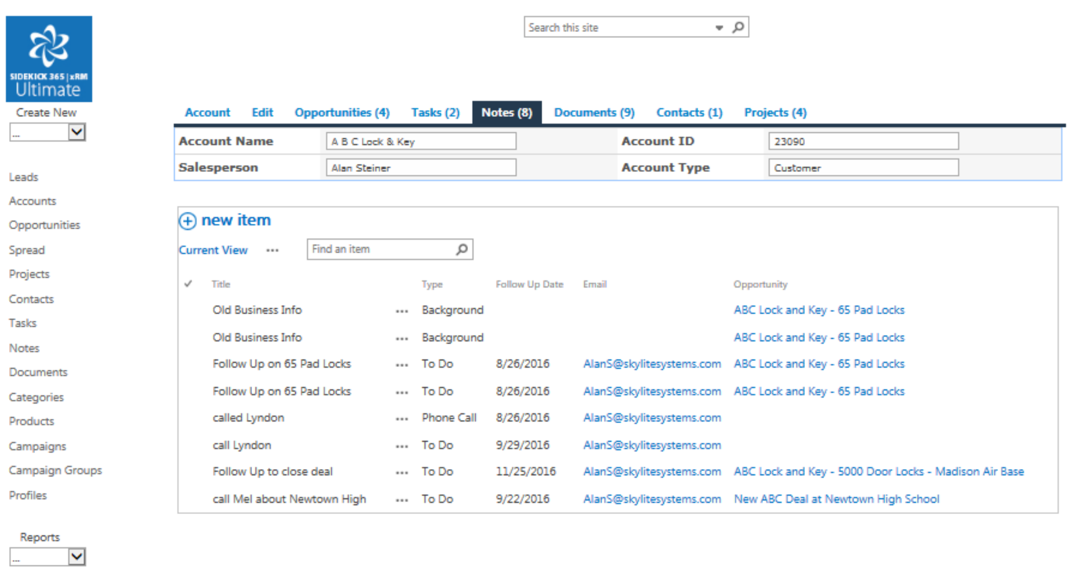
Notes

Notes are always associated with an Account, Project, or Opportunity. You can add a Note using the dropdown in the left hand dropdown in the Home page or from within an Account, Project or Opportunity using the grid and checkbox on the detail page, or using the Notes tab. Accounts will list all of the Notes associated with that Account in the grid, but all Notes associated with the Account and any Opportunity linked to that Account in the Tab.

Notice that the account only shows 2 Notes in the Grid on the account page



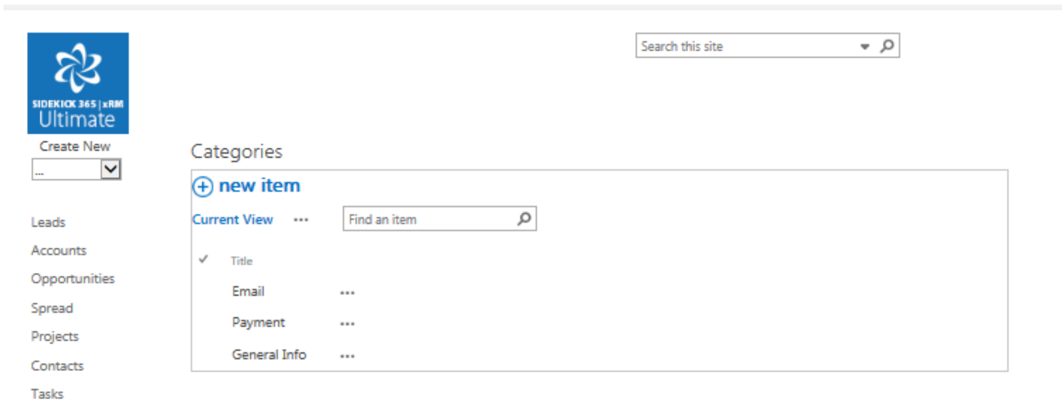
Notice that the tab shows a total of eight (8) notes associated with the Account. When you select the Notes tab, you can see all the notes for the account and the Opportunities linked to tat account. This concept is similar to the way Documents are displayed within the Document tab in an account.



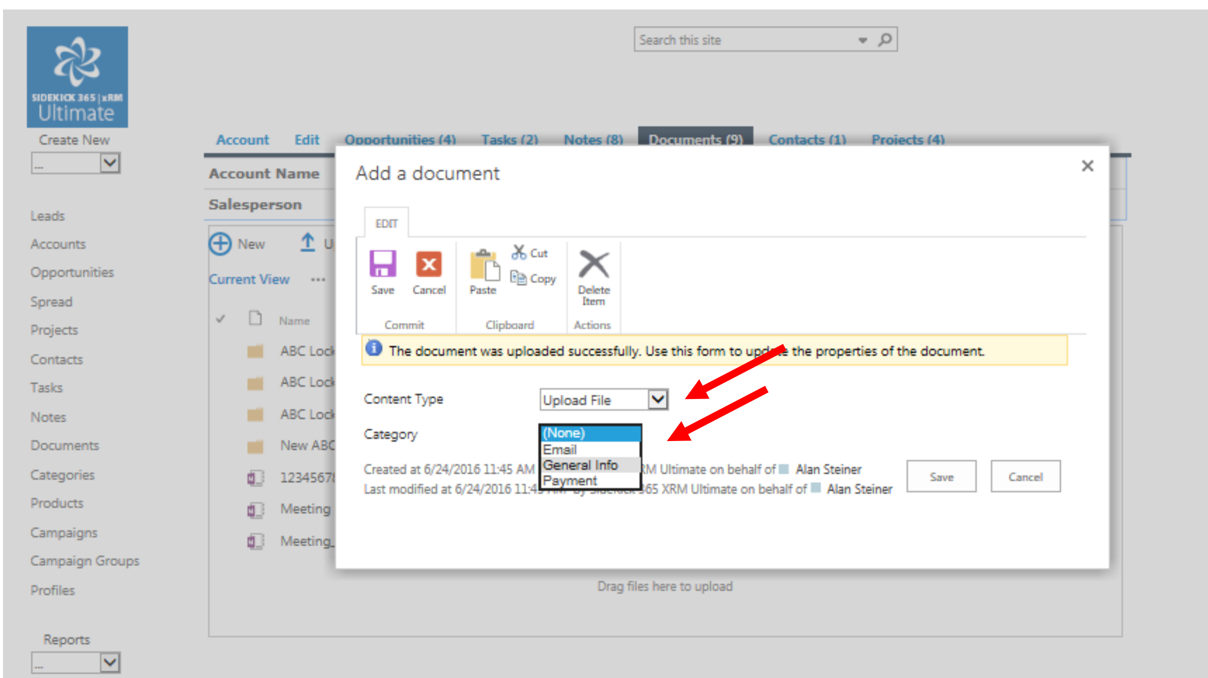
The next few modules - Categories and Profiles - are used by system administrators to help categorize uploaded files and to set security in the App.

Categories

Categories is a simple list used within the Documents module to classify files that are associated with Accounts and Opportunities. The entries in the Category module are used to populate the drop-down category that is displayed within the document module when adding a new document. The categories module is shown below:



The categories that you set up here are displayed in the dropdown when you add a new document anywhere in SideKick365 xRM Ultimate. Note – these categories only appear when you select the content type Upload File as shown below.

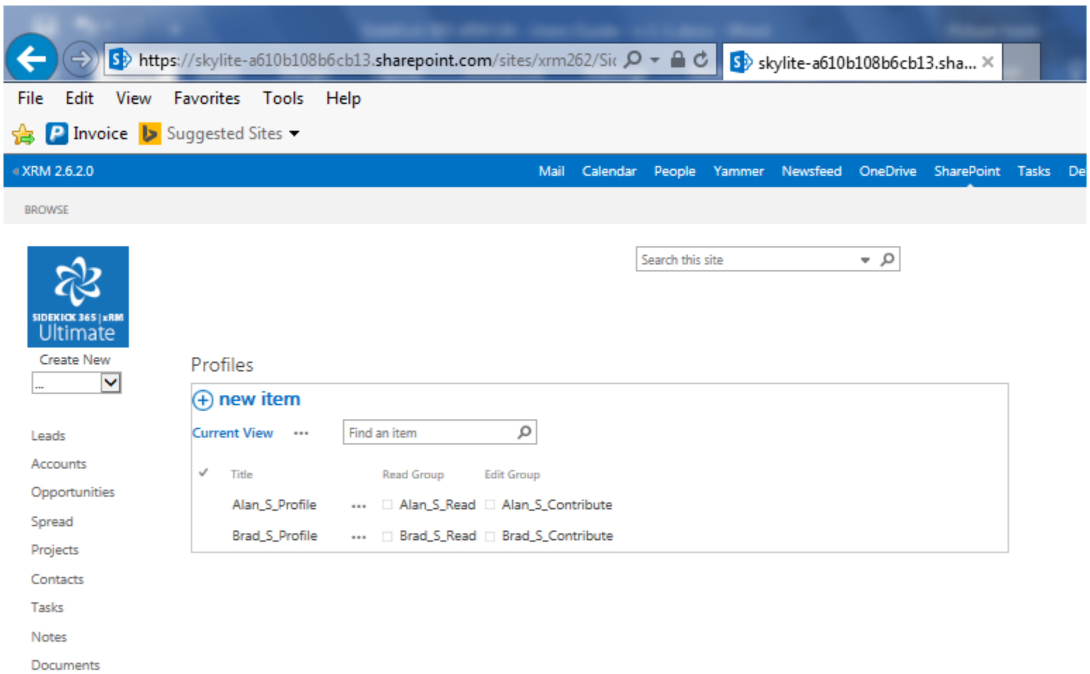


Profiles

Profiles manage the Security Profiles used to set “Who” can see “What” in Opportunities, Contacts, Projects, and Accounts. The Profiles module is a simple list managed by users with a permission level that allows users to set permissions. Security Profiles can only be applied by users that have the ability to set permissions in the App. This is explained in great detail in the Set Up guide.

Let’s take a closer look - the Profiles list is shown below. The Edit and Read groups are SharePoint groups in the site that hosts the SideKick365 xRM App. This module is discussed in great detail in the set up guide. It is also described in great detail a series of video’s here: http://www.skylitesystems.com/Pages/SideKick365xRMUltimateVideos.aspx

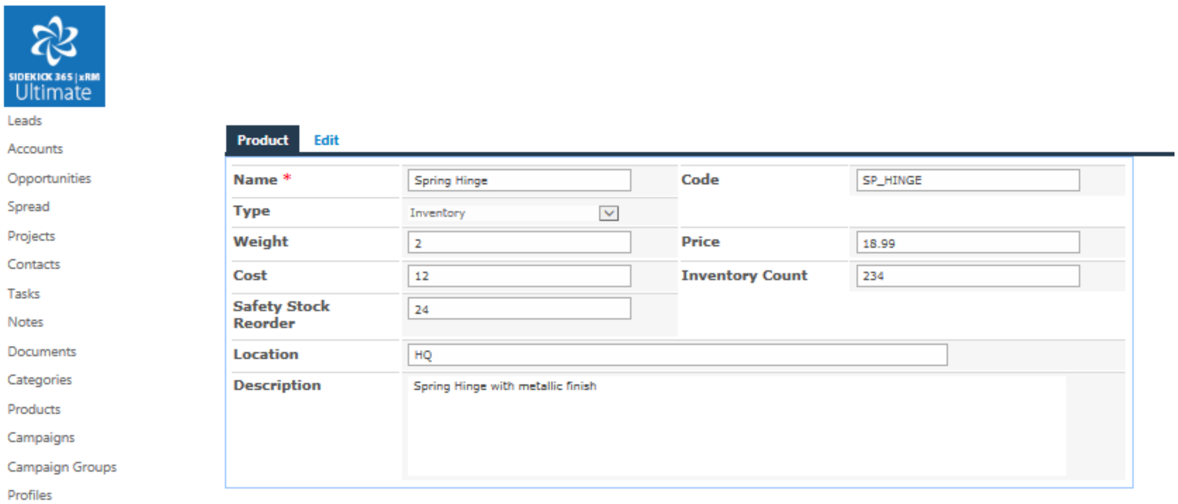
Rather than reproduce the content of the videos within this guide, see video 7 in the link above for an overview of security modele. Next, take a look at video’s 8, 9, and 10 for a detailed explanation and review of how administrative streps required to set up security within Sidekick365 xRM Ultimate.



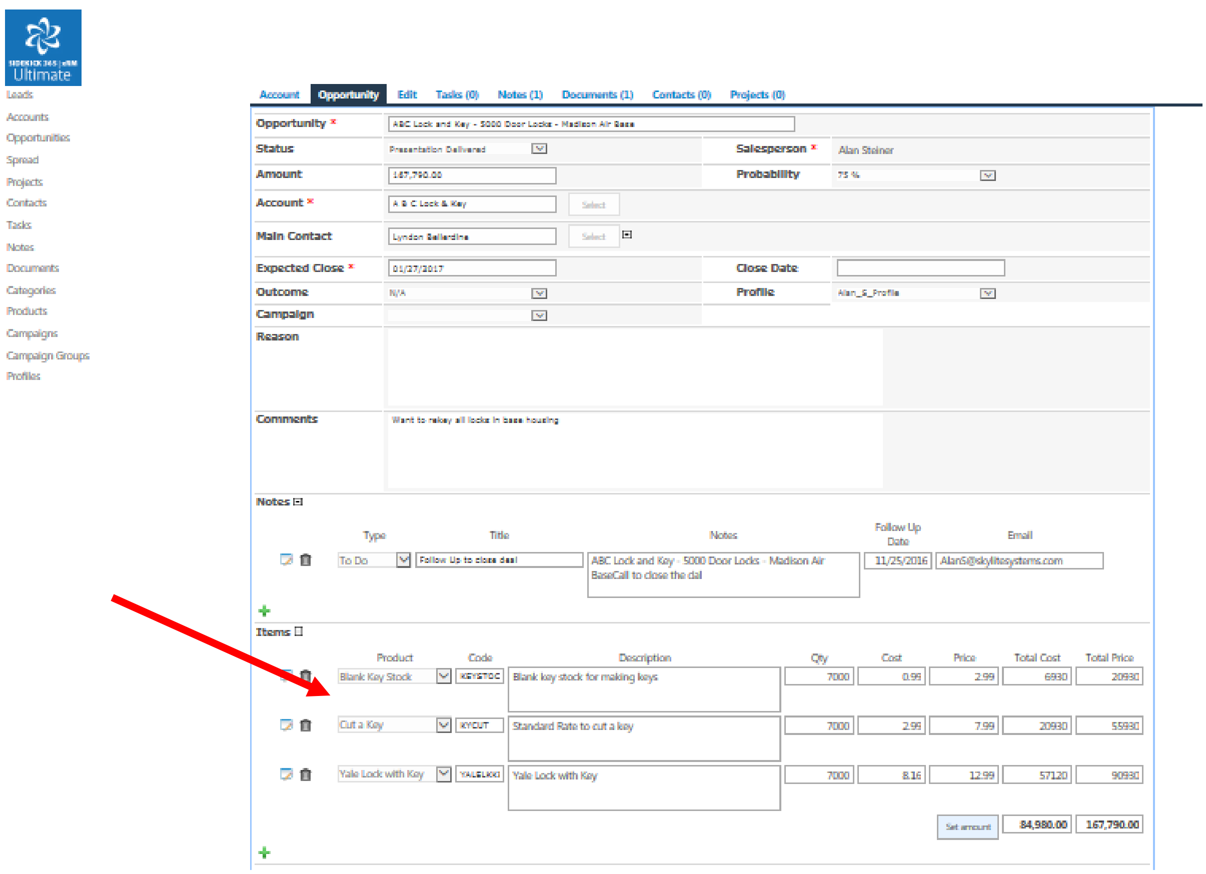
Products

The Products module lets you set up products that will appear within the Items grin in Projects and Opportunities. Products can be inventory items or they can be service/intangible items, the choice is up to you.

Products support a way to manage the location, the quantity on-hand and a safety stock re-order quantity. They are not presently "hooked" up to maintain the quantity based upon the amount consumed in an Opportunity or Project, but hey could be – please email us at Info@SkyLiteSystems.Com if this s something you need.



The screenshot below shows how Products are used within the Items grind in an Opportunity.



Campaign Groups and Campaigns

SideKick365 xRM Ultimate supports outbound email campaigns using the Campaign Groups module to set up groups of recipients and Campaigns to manage the body of the email sent by SideKick365 xRM Ultimate. Let's look at how these two modules work to let you manage outbound campaigns.

Campaign Groups

Campaign Groups are created to maintain a list of who will be sent an email. The groups can be created from a view that you create in the Contact list, or you can add members to that group as needed. The basic flow is

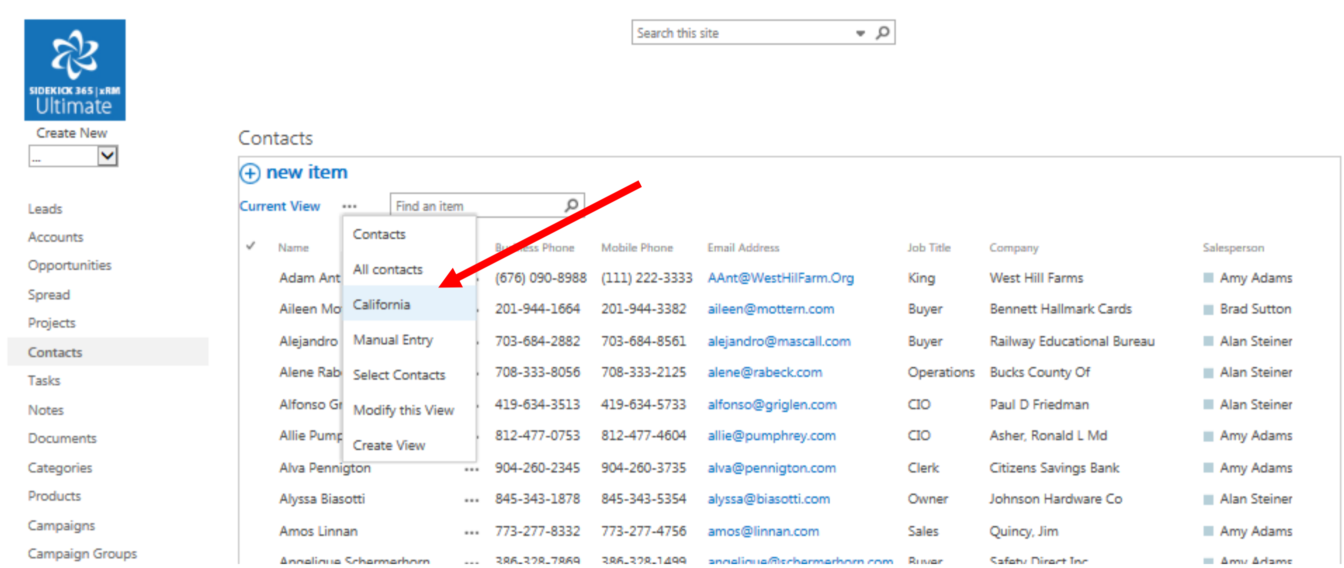
1 - You create a view in SideKick365 xRM Ultimate Contacts and save that view

2 – Go into the Campaign Group Module and create a new entry

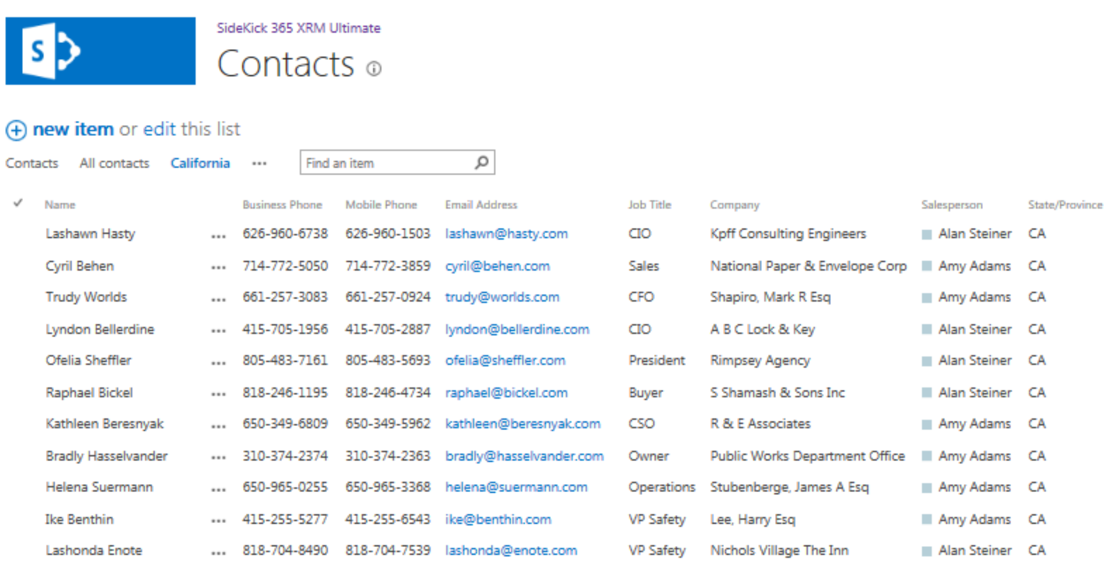
3 – Select the view you just made and add/delete contacts as needed

Let's see how this works…

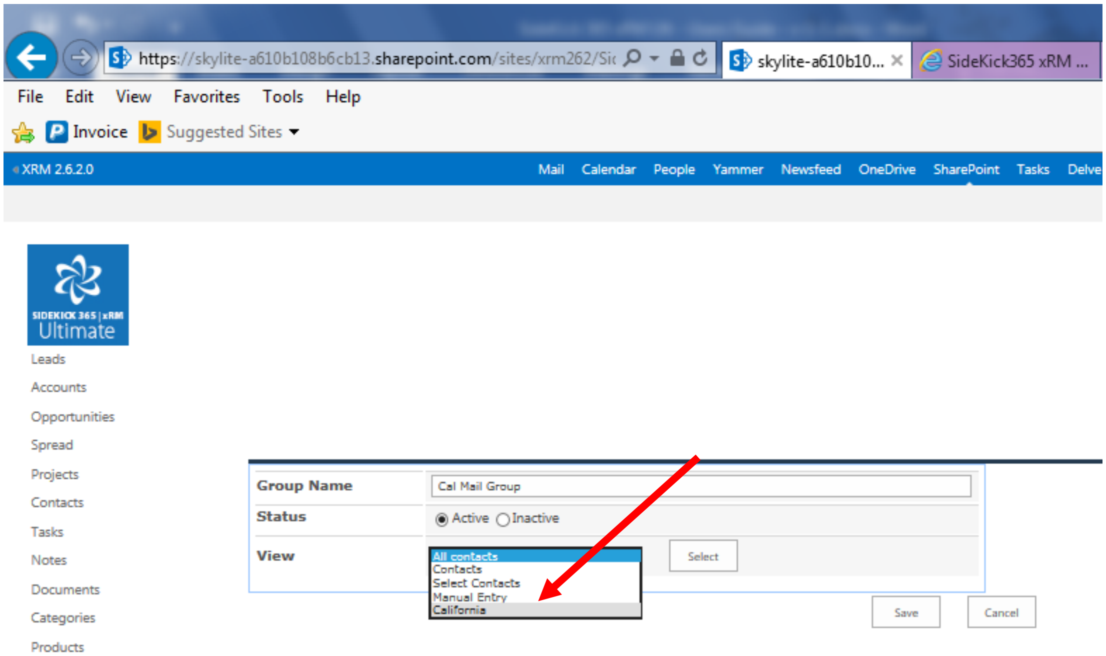
1 – I created a view in Contacts where State = CA and called in California. In the screenshot below, I am selecting the "California" view.



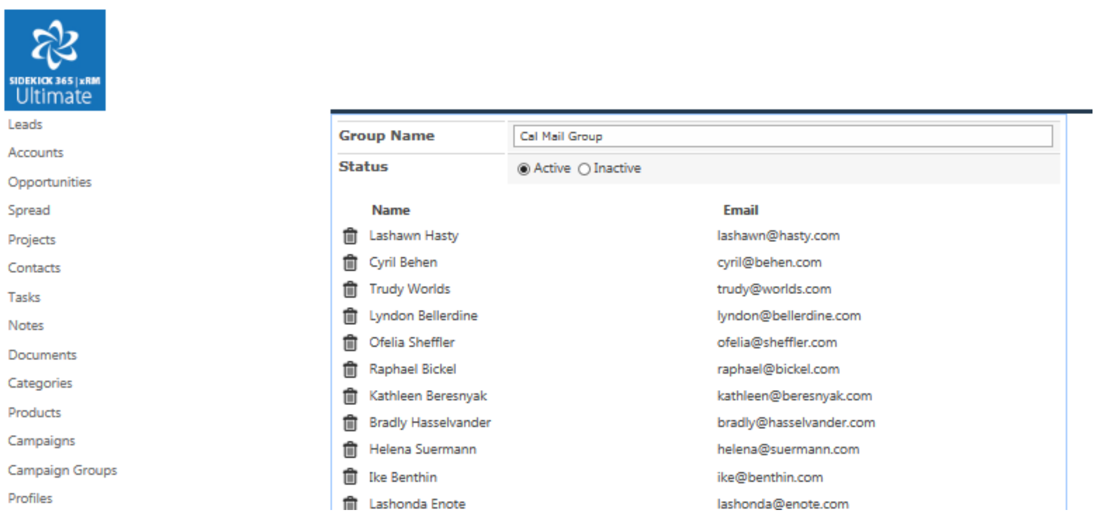
2 – Now I have Selected the California View – notice all Contacts are from California



3 – Now I create a New Campaign Group in the Campaign Group Module, and select the California View that I made over in the Contacts Module.



4 – And I edit the members adding/deleting as I need by hitting the green checkmark or trash can button



OK, so now we have a list of people we want to send emails to. Let's build a campaign.

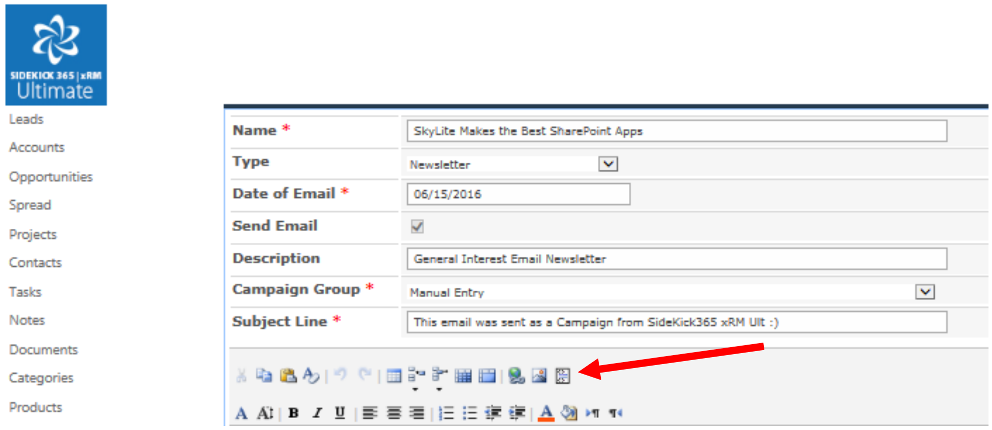
Campaigns

The Campaigns module is used to build emails that will be sent to each member in the Campaign Group selected for that email campaign. Let's take a look.

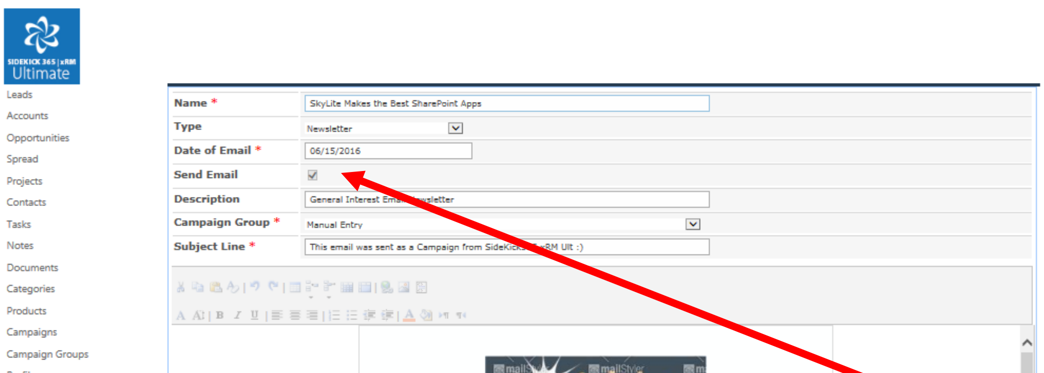
1 – Navigate to the Campaigns Module and select the add new Campaign

2 – Fill in the required fields and enter the body of the Email into the Rich Text Field

3 – VERY IMPORTANT – The Rich Text field ONLY works in Internet Explorer 11. It does not work in Chrome, FireFox, or Edge. We suggest looking at a product called MailStyler if you want to design clean emails. You can learn more about the product at http://www.newslettercreator.com/ . You can paste email directly into the Rich Text Field by selecting the HTML button as shown below



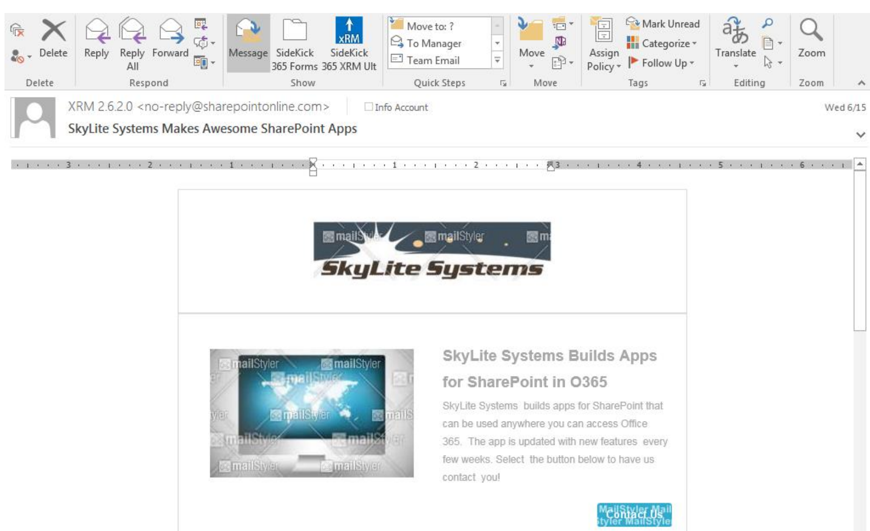
4 – Pasting in the HTML created in MailStyler will create nicely formed emails



The screenshot below shows an email created by email above.

5 – The Email will be sent on the date entered in the “Date of Email” field once the Send email button is selected. The emails will not be sent until this button is selected. This is by design. It lets you work on the email as needed, then hit the checkmark button to get it sent.

6 – Final Thoughts – You should be very careful about “spamming” from Office 35. Don’t do it or you will start getting all your emails blocked. Only use this capability selectively, and make sure to give recipients a chance to opt out and then honor requests to remove these recipients from the list.



Charts

SideKick365 xRM Ultimate ships with 4 charts that are available in the dropdown. These charts include:

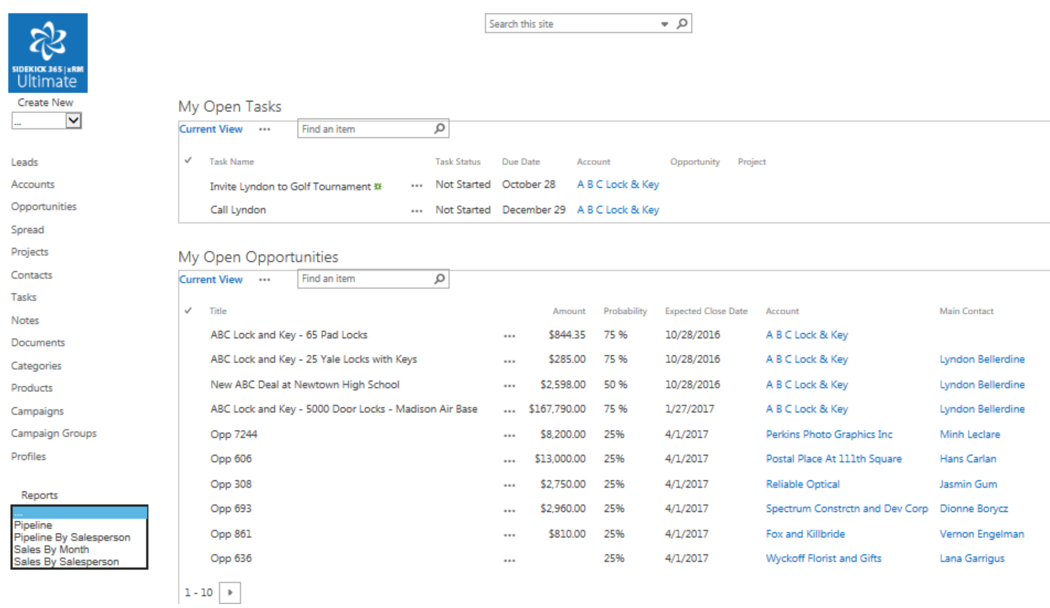
- Pipeline – A list of all open Opportunities by Month
- Pipeline by Owner –Open Opportunities broken out by owner and month
- Sales By Month – Closed Opportunities by Month
- Sales By Owner - A breakdown of sales by month and owner

The charts are accessed using the reports dropdown as shown below

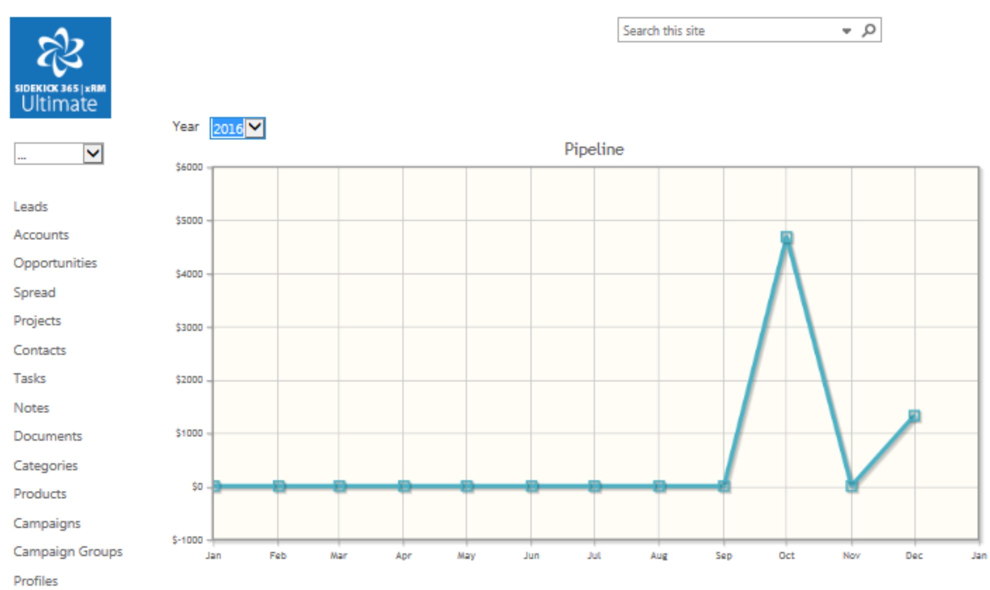
Tip – you will only see opportunities that you have access to. If an Opportunity has been a security profile that does not let you read or edit it, then the Opportunity will not be included within the report.

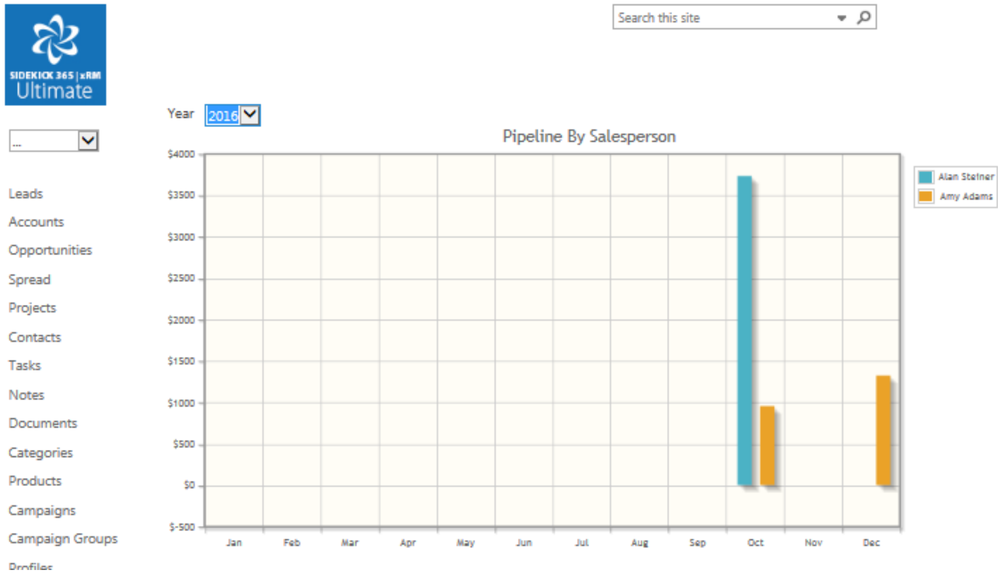
Tip - A detailed examination of reporting using these charts and custom list views follows in the next section of this guide.

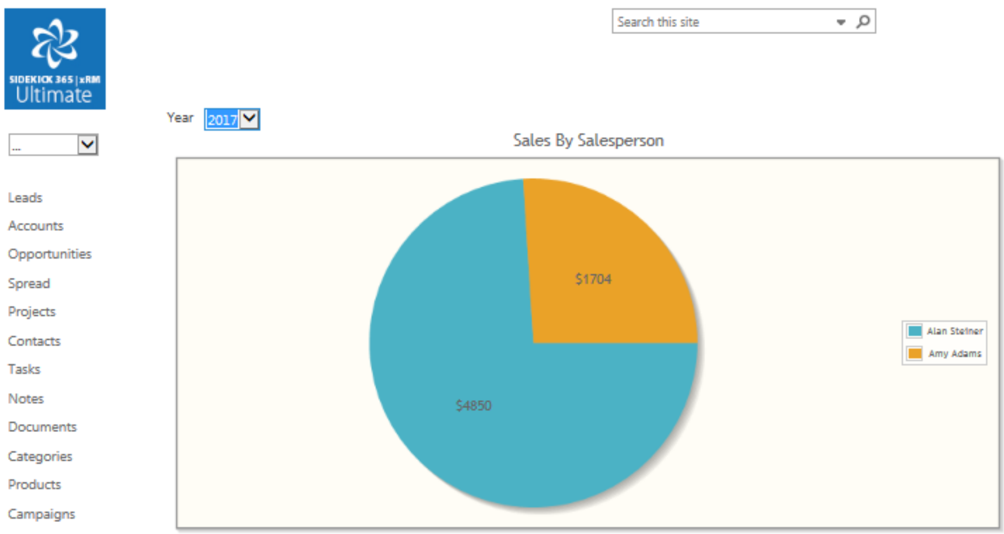
A sample of the Pipeline chart is shown below followed by examples of the other three out of the box reports included within SideKick365 xRM Ultimate.



A sample of the chart of “Pipeline”, “Sales by Owner”, and “Sales by Month” are shown below.







Tip – Reports and Charts can be customized and additional reports can be created as needed. Just contact us at Info@skyliteystems.com to learn how.

Reporting Using List Views

You can also use the lists views in SharePoint to create new reports and to customize the views that you get “out of the box”. We have created a video to explain how all of this works. Grab some popcorn and watch video 14 on our website here http://www.skylitesystems.com/Pages/SideKick365xRMUltimateVideos.aspx

Importing Existing Data

Moving into SideKick365 xRM Ultimate is easy. Your license to Sidekick365 xRM Ultimate includes a utility that imports data using standardized Excel templates for your Contacts, Accounts and Opportunities. We can supply you with the required templates along with detailed instruction on how to format your existing data and how to import the data into SideKick365 xRM Ultimate as needed.

See video 10 on our website http://www.skylitesystems.com/Pages/SideKick365xRMUltimateVideos.aspx for more information or drop us a line at info@skylitesystems.Com for more information.

Customization

SideKick365 xRM Ultimate can be customized to your needs. It is very important that the customizations are done carefully since some fields are required by the app to link items to one another. See video 11 on our website http://www.skylitesystems.com/Pages/SideKick365xRMUltimateVideos.aspx for more information or drop us a line at info@skylitesystems.Com to discuss any customizations you may require.

How to Exit

It is easy to exit from SideKick365 xRM Ultimate, just go to the File menu within the browser you are using and select the "exit" option.

Conclusion – and Next Steps

This concludes the overview section of this user guide. We have a wonderful instance of SideKick365 xRM Ultimate loaded with hundreds of accounts, opportunities and contacts and sample projects and documents that you can log into to take SideKick35 xRM Ultimate on a test drive. Just drop us an email at Info@SkyLiteSystems.Com and request a copy of the test drive guide. We'll send you a detailed guide along with instructions so you can try out SideKick365 xRM Ultimate. The Test Drive sample is loaded with hundreds of Accounts, Opportunities, Contacts, Projects, Documents and notes. It will give you a chance to get "hands on" and try out SideKick365 xRM in Office 365 so you can learn about the App before you start to add your own data.

Thx for purchasing SideKick365 xRM Ultimate. Do not hesitate to reach out if you need any help to Info@SkyLiteSystems.Com .