



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 more 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>

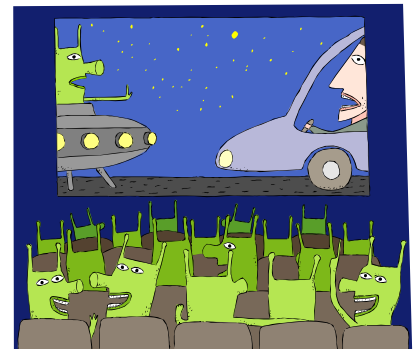
Video 1 and 2– SideKick365 xRM Ultimate - Overview – This is the first video you should watch. The video includes a nice overview of SideKick365 xRM Ultimate and some solid examples of how the App can help you get organized and close more sales.

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.

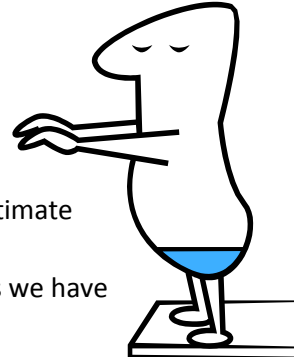
Video 5 - Project Module Overview - SideKick365 xRM Ultimate - Projects are powerful ways to manage a collection of files, notes, tasks and people surrounding a topic or initiative. Projects can be used as Case Management, Project Management, or General Collaboration E-Rooms. Projects can have security 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:

My Open Tasks

Task Name	Task Status	Due Date	Account	Opportunity	Project
Call Lyndon	Not Started	December 29	A B C Lock & Key		

My Open Opportunities

Title	Amount	Probability	Expected Close Date	Account	Main Contact
ABC Lock and Key - 65 Pad Locks	\$844.35	75 %	10/28/2016	A B C Lock & Key	
ABC Lock and Key - 25 Yale Locks with Keys	\$285.00	75 %	10/28/2016	A B C Lock & Key	Lyndon Bellerdine
New ABC Deal at Newtown High School	\$2,598.00	50 %	10/28/2016	A B C Lock & Key	Lyndon Bellerdine
ABC Lock and Key - 5000 Door Locks - Madison Air Base	\$167,790.00	75 %	1/27/2017	A B C Lock & Key	Lyndon Bellerdine
Opp 7244	\$8,200.00	25%	4/1/2017	Perkins Photo Graphics Inc	Minh Leclaire
Opp 606	\$13,000.00	25%	4/1/2017	Postal Place At 111th Square	Hans Carlan
Opp 308	\$2,750.00	25%	4/1/2017	Reliable Optical	Jasmin Gum
Opp 693	\$2,960.00	25%	4/1/2017	Spectrum Constrctn and Dev Corp	Dionne Borycz
Opp 861	\$810.00	25%	4/1/2017	Fox and Killbride	Vernon Engelman
Opp 636		25%	4/1/2017	Wyckoff Florist and Gifts	Lana Garrigus

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 wildcard 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:

Account																							
Account		Edit	Opportunities (4)	Tasks (1)	Notes (8)	Documents (9)	Contacts (0)	Projects (3)															
Name *	A B C Lock & Key	Type	Customer																				
Account ID	23090	Salesperson	Alan Steiner																				
Phone	415-705-1956	Fax Number	415-705-2887																				
Web Site	http://www.ABCLock&Key.com																						
Address	200 California St																						
City	San Francisco	State	CA																				
Zip Code	94111	Country	USA																				
Billing Address	<input checked="" type="checkbox"/> same as physical																						
Address	200 California St																						
City	San Francisco	State	CA																				
Zip Code	94111	Country	USA																				
Main Contact	Lyndon Bellerline	Select	Profile	Alan_S_Profile																			
Campaign																							
Notes																							
<table border="1"><thead><tr><th>Type</th><th>Title</th><th>Notes</th><th>Follow Up Date</th><th>Email</th></tr></thead><tbody><tr><td>Phone Call</td><td>called Lyndon</td><td>good call</td><td>08/26/2016</td><td>AlanS@skylitesystems.com</td></tr><tr><td>To Do</td><td>call Lyndon</td><td>Remind him about golf in October</td><td>09/29/2016</td><td>AlanS@skylitesystems.com</td></tr></tbody></table>									Type	Title	Notes	Follow Up Date	Email	Phone Call	called Lyndon	good call	08/26/2016	AlanS@skylitesystems.com	To Do	call Lyndon	Remind him about golf in October	09/29/2016	AlanS@skylitesystems.com
Type	Title	Notes	Follow Up Date	Email																			
Phone Call	called Lyndon	good call	08/26/2016	AlanS@skylitesystems.com																			
To Do	call Lyndon	Remind him about golf in October	09/29/2016	AlanS@skylitesystems.com																			

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.

Account																							
Account		Edit	Opportunities (4)	Tasks (1)	Notes (8)	Documents (9)	Contacts (0)	Projects (4)															
Name *	A B C Lock & Key	Type	Customer																				
Account ID	23090	Salesperson	Alan Steiner																				
Phone	415-705-1956	Fax Number	415-705-2887																				
Web Site	http://www.ABCLock&Key.com																						
Address	200 California St																						
City	San Francisco	State	CA																				
Zip Code	94111	Country	USA																				
Billing Address	<input checked="" type="checkbox"/> same as physical																						
Address	200 California St																						
City	San Francisco	State	CA																				
Zip Code	94111	Country	USA																				
Main Contact	Lyndon Bellerline	Select	Profile	Alan_S_Profile																			
Campaign																							
Notes																							
<table border="1"><thead><tr><th>Type</th><th>Title</th><th>Notes</th><th>Follow Up Date</th><th>Email</th></tr></thead><tbody><tr><td>Phone Call</td><td>called Lyndon</td><td>good call</td><td>08/26/2016</td><td>AlanS@skylitesystems.com</td></tr><tr><td>To Do</td><td>call Lyndon</td><td>Remind him about golf in October</td><td>09/29/2016</td><td>AlanS@skylitesystems.com</td></tr></tbody></table>									Type	Title	Notes	Follow Up Date	Email	Phone Call	called Lyndon	good call	08/26/2016	AlanS@skylitesystems.com	To Do	call Lyndon	Remind him about golf in October	09/29/2016	AlanS@skylitesystems.com
Type	Title	Notes	Follow Up Date	Email																			
Phone Call	called Lyndon	good call	08/26/2016	AlanS@skylitesystems.com																			
To Do	call Lyndon	Remind him about golf in October	09/29/2016	AlanS@skylitesystems.com																			

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.



Create New
...

Leads
Accounts
Opportunities
Spread
Projects
Contacts
Tasks
Notes
Documents
Categories
Products
Campaigns
Campaign Groups
Profiles

Reports
...

Search this site

Account Edit Opportunities (4) Tasks (1) Notes (8) Documents (9) Contacts (0) Projects (4)

Account Name: A B C Lock & Key Account ID: 23090
Salesperson: Alan Steiner Account Type: Customer

New Upload Sync Share More

Current View Find a file

✓	Name	Modified	Modified By	Category
	ABC Lock and Key 25 Yale Locks with Keys_Opportunity627	June 10	Dave Chennault	
	ABC Lock and Key 5000 Door Locks Madison Air Base_Opportunity628	June 10	Alan Steiner	
	ABC Lock and Key 65 Pad locks_Opportunity626	June 10	Alan Steiner	
	New ABC Deal at Newtown High School_Opportunity636	Yesterday at 12:45 PM	Alan Steiner	
	12345678901234567890123	June 9	Dave Chennault	
	Meeting with Sally and Julie	June 9	Dave Chennault	
	Meeting_With_Larry_and_Bob	June 9	Dave Chennault	

Drag files here to upload

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.



- Leads
- Accounts
- Opportunities
- Spread
- Projects
- Contacts
- Tasks
- Notes
- Documents
- Categories
- Products
- Campaigns
- Campaign Groups
- Profiles

Contact Edit			
Name *	Adam Ant	Company	West Hill Farms
Job Title	King	Email	AAnt@WestHillFarm.Org
Business Phone	(676) 090-8988	Mobile Phone	(111) 222-3333
Fax Number	(333) 000-9088		
Address	123 West End Way		
City	New York	State	New York
Zip Code	89009	Country	United States of America
Salesperson	Amy Adams	Profile	Alan_S_Profile
Campaign			
Notes	Adam is a very hard worker. He takes short breaks, works long hours and is very dependable.		

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.



- Leads
- Accounts
- Opportunities
- Spread
- Projects
- Contacts
- Tasks
- Notes
- Documents
- Categories
- Products
- Campaigns
- Campaign Groups
- Profiles

Name *	A B C Lock & Key	Type	Customer
Account ID	23090	Salesperson	Alan Steiner Reset
Phone	415-705-1956	Fax Number	415-705-2887
Web Site	http://www.ABCLock&Key.com		
Address	200 California St		
City	San Francisco	State	CA
Zip Code	94111	Country	USA
Billing Address	<input checked="" type="checkbox"/> same as physical		
Address	200 California St		
City	San Francisco	State	CA
Zip Code	94111	Country	USA
Main Contact	Lyndon Bellerdine	Select <input type="checkbox"/>	Profile Alan_S_Profile

Create new contact

Name	Lyndon Bellerdine	Company	A B C Lock & Key
Job Title	CIO	Email	lyndon@bellerdine.com
Business Phone	415-705-1956	Mobile Phone	415-705-2887
Fax Number	415-705-2888		
Address	200 California St		

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 EXCEPT the checkmark column... hit the name of the contact for example.

+ new item or edit this list

Find an item

✓	ID	Name	Company	Business Phone	Email Address	Job Title
	502	Adam Ant	West Hill Farms	(676) 090-8988	AAnt@WestHillFarm.Org	King
	489	Aileen Mottern	Bennett Hallmark Cards	201-944-1664	aileen@mottern.com	Buyer
	192	Alejandro Mascall	Railway Educational Bureau	703-684-2882	alejandromascall.com	Buyer
	171	Alene Rabeck	Bucks County Of	708-333-8056	alene@rabeck.com	Operations
	385	Alfonso Griglen	Paul D Friedman	419-634-3513	alfonso@griglen.com	CIO
✓	418	Allie Pumphrey	Asher, Ronald L Md	812-477-0753	allie@pumphrey.com	CIO
	70	Alva Pennigton	Citizens Savings Bank	904-260-2345	alva@pennigton.com	Clerk
	101	Alyssa Biasotti	Johnson Hardware Co	845-343-1878	alyssa@biasotti.com	Owner
	234	Amos Linnan	Quincy, Jim	773-277-8332	amos@linnan.com	Sales
	126	Angelique Schermerhorn	Safety Direct Inc	386-328-7869	angelique@schermerhorn.com	Buyer

1 - 10

OK Cancel

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.

Search this site

Account Edit Opportunities (4) Tasks (1) Notes (8) Documents (9) **Contacts (1)** Projects (4)

Account Name A B C Lock & Key Account ID 23090

Salesperson Alan Steiner Account Type Customer

+ new item

Current View Find an item

✓	Title	Phone	Mobile Phone	Email
	William Shatner #	242-090-0900	343-009-0900	WShatner@ABC.Com

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...

SideKick365 xRM Ultimate

Leads
Accounts
Opportunities
Spread
Projects
Contacts
Tasks
Notes
Documents
Categories
Products
Campaigns
Campaign Groups
Profiles

Main Contact

Select

Name: [Field]
Company: A B C Lock & Key
Job Title: [Field]
Email: [Field]
Business Phone: [Field]
Mobile Phone: [Field]
Fax Number: [Field]
Address: 200 California St
City: San Francisco
State: CA
Zip Code: 94111
Country: USA

Comments: [Text Area]

Save Cancel

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 xRM Ultimate

BROWSE ITEMS LIST

Modify View - Current View: Default
View Format: View Quick Edit Create View
Tags & Notes: Tags & Notes
Share & Track: E-mail a Link Alert Me RSS Feed
Connect & Export: Export to Excel Sync with Outlook
Open with: Open with Access Open with Project
Settings: Shared With Workflow Settings

Create New: [Dropdown]

Leads
Accounts
Opportunities
Spread
Projects
Contacts
Tasks

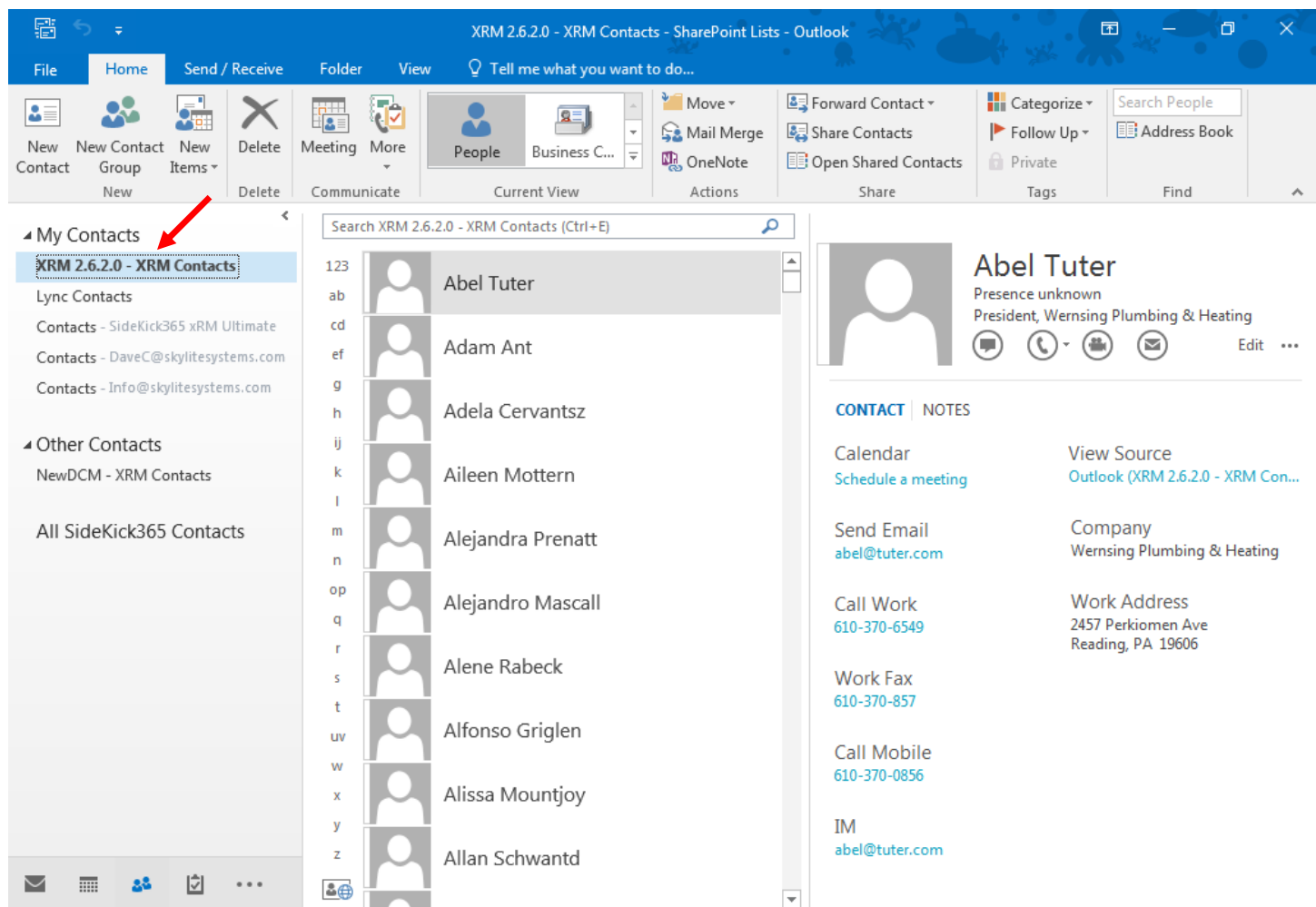
Contacts

+ new item

Current View: Find an Item

✓	Name	Business Phone	Mobile Phone	Email Address	Job Title	Company	Salesperson
✓	Adam Ant	(676) 090-8988	(111) 222-3333	AAnt@WestHillFarm.Org	King	West Hill Farms	Amy Adams
	Aileen Mottern	201-944-1664	201-944-3382	aileen@mottern.com	Buyer	Bennett Hallmark Cards	Brad Sutton
	Alejandro Mascall	703-684-2882	703-684-8561	alejandromascall.com	Buyer	Railway Educational Bureau	Alan Steiner
	Alene Rabeck	708-333-8056	708-333-2125	alene@rabeck.com	Operations	Bucks County Of	Alan Steiner

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 an 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...

The screenshot displays the Opportunity module interface. On the left is a sidebar with navigation links: Leads, Accounts, Opportunities, Spread, Projects, Contacts, Tasks, Notes, Documents, Categories, Products, Campaigns, Campaign Groups, and Profiles. The main area shows the Opportunity form for 'ABC Lock and Key - 5000 Door Locks - Madison Air Base'. The form includes fields for Status (Presentation Delivered), Amount (\$167,790.00), Salesperson (Alan Steiner), Probability (75%), Account (A B C Lock & Key), Main Contact (Lyndon Bellerline), Expected Close (01/27/2017), Close Date, Outcome (N/A), Profile (Alan_S_Profile), Campaign, Reason, and Comments (Want to rekey all locks in base housing). Below the form are three sections: Notes, Items, and Spread. The Notes section has a table with columns: Type, Title, Notes, Follow Up Date, and Email. The Items section has a table with columns: Product, Code, Description, Qty, Cost, Price, Total Cost, and Total Price. The Spread section has a table with columns: Date and Amount. Red arrows point to the 'New Item' button in the Notes section and the 'Set amount' button in the Items section.

Type	Title	Notes	Follow Up Date	Email
To Do	Follow Up to close deal	ABC Lock and Key - 5000 Door Locks - Madison Air Base Call to close the deal	11/25/2016	AlanS@skylitesystems.com

Product	Code	Description	Qty	Cost	Price	Total Cost	Total Price
Blank Key Stock	KEYSTOC	Blank key stock for making keys	7000	0.99	2.99	6930	20930
Cut a Key	KYCUT	Standard Rate to cut a key	7000	2.99	7.99	20930	55930
Yale Lock with Key	YALELKKI	Yale Lock with Key	7000	8.16	12.99	57120	90930

Date	Amount
01/31/2017	40,000.00
02/28/2017	40,000.00
03/31/2017	40,000.00
05/31/2017	47,790.00

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.

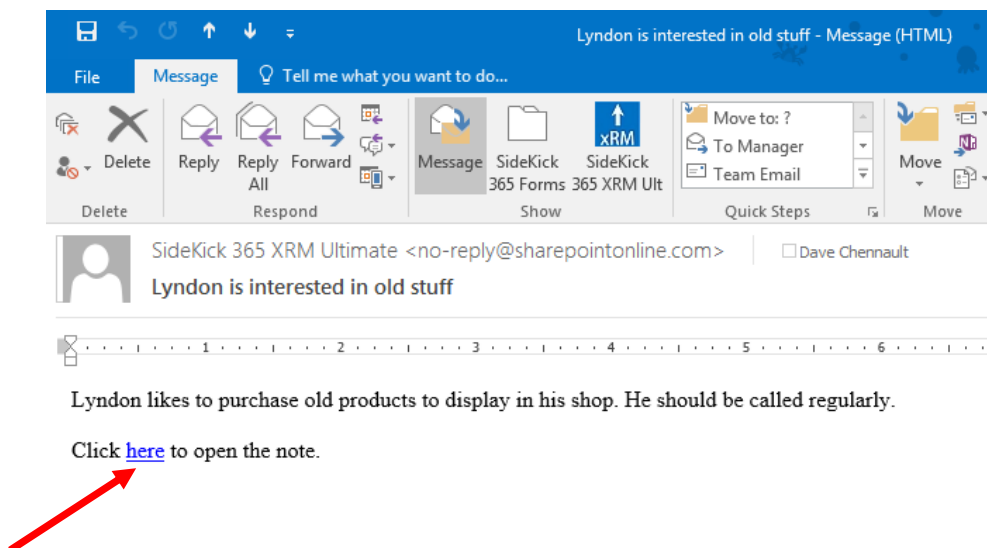
Let's talk about Spread a little more. Spread is great, since you can enter in the details about an Opportunity and then spread the projected revenue of that opportunity across many time periods. Just spread as needed, then you can get a report of the spread value by – you guessed it – going to the Spread 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 Note. 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.

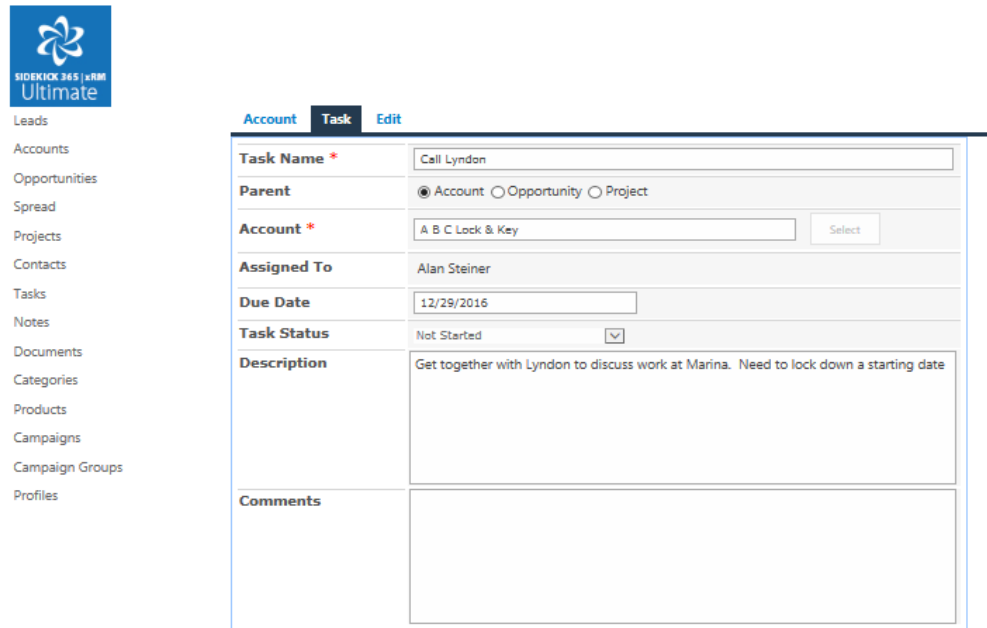
TIP – The Opportunities Module can be customized to fit your business needs. Contact us at info@skylitesystems.com with your needs and we will get in touch to discuss the best way to customize SideKick365 xRM Ultimate to fit your needs.

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.

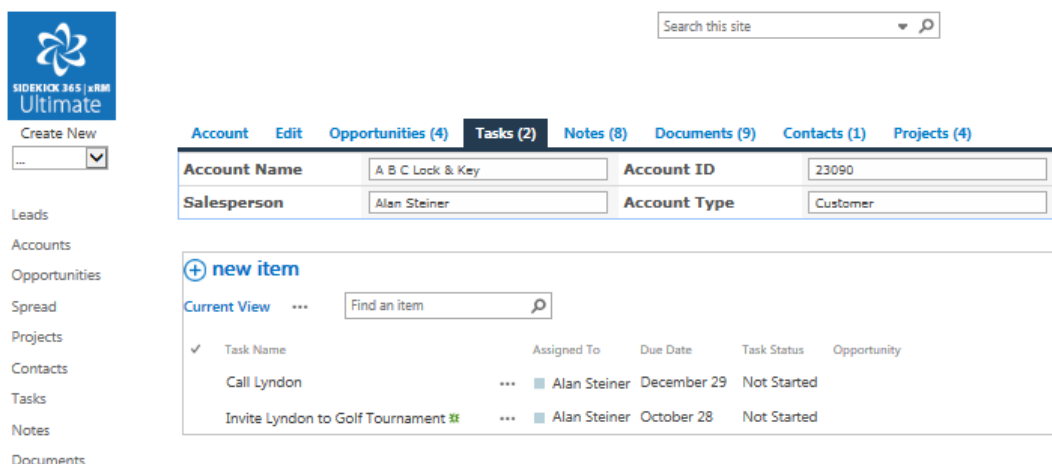


The screenshot shows the 'Task' form in the SideKick365 xRM Ultimate application. The left sidebar contains a navigation menu with items: Leads, Accounts, Opportunities, Spread, Projects, Contacts, Tasks, Notes, Documents, Categories, Products, Campaigns, Campaign Groups, and Profiles. The main form has tabs for 'Account', 'Task', and 'Edit'. The 'Task' tab is active, showing fields for: Task Name (Call Lyndon), Parent (Account selected), Account (ABC Lock & Key), Assigned To (Alan Steiner), Due Date (12/29/2016), Task Status (Not Started), Description (Get together with Lyndon to discuss work at Marina. Need to lock down a starting date), and Comments.

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



The screenshot shows the 'Tasks' list view for the account 'ABC Lock & Key'. The left sidebar is the same as in the previous screenshot. The top navigation bar shows tabs for 'Account', 'Edit', 'Opportunities (4)', 'Tasks (2)', 'Notes (8)', 'Documents (9)', 'Contacts (1)', and 'Projects (4)'. The 'Tasks (2)' tab is active. Below the tabs, there are fields for 'Account Name' (ABC Lock & Key), 'Account ID' (23090), 'Salesperson' (Alan Steiner), and 'Account Type' (Customer). Below these fields is a '+ new item' button and a search bar. The main area displays a table of tasks:

Task Name	Assigned To	Due Date	Task Status	Opportunity
Call Lyndon	Alan Steiner	December 29	Not Started	
Invite Lyndon to Golf Tournament	Alan Steiner	October 28	Not Started	

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>

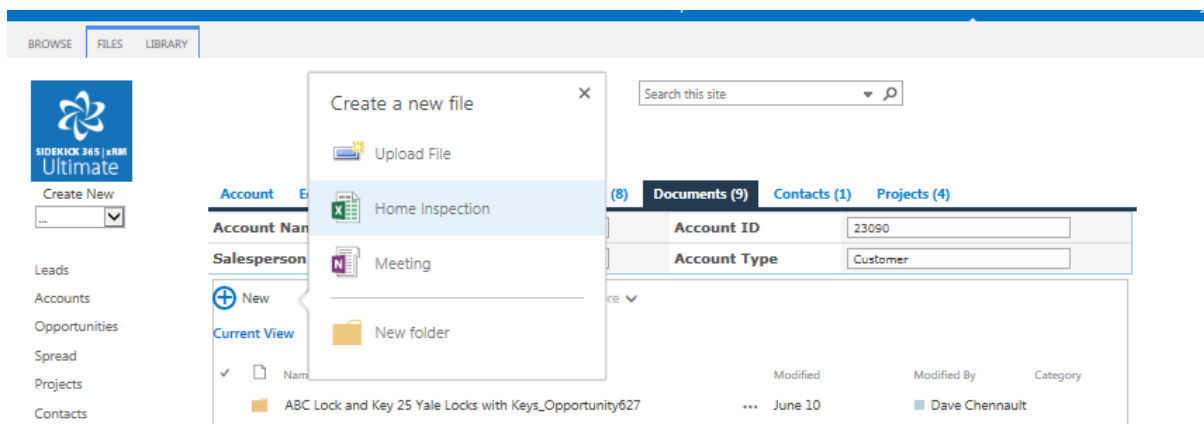
We have a separate installation guide for each of the add-ins. Please contact us at Info@skylitesystems.com to obtain a copy of these guide.

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



Leads
Accounts
Opportunities
Spread
Projects
Contacts
Tasks
Notes
Documents
Categories
Products
Campaigns
Campaign Groups
Profiles

Account Edit Opportunities (4) Tasks (2) Notes (8) Documents (9) Contacts (1) Projects (4)

Name *	A B C Lock & Key	Type	Customer
Account ID	23090	Salesperson	Alan Steiner
Phone	415-705-1956	Fax Number	415-705-2887
Web Site	http://www.ABCLock&Key.com		
Address	200 California St		
City	San Francisco	State	CA
Zip Code	94111	Country	USA
Billing Address	<input checked="" type="checkbox"/> same as physical		
Address	200 California St		
City	San Francisco	State	CA
Zip Code	94111	Country	USA
Main Contact	Lyndon Bellerline	Profile	Alan_S_Profile
Campaign			

Notes

Type	Title	Notes	Follow Up Date	Email
Phone Call	called Lyndon	good call	08/26/2016	AlanS@skylitesystems.com
To Do	call Lyndon	Remind him about golf in October	09/29/2016	AlanS@skylitesystems.com

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 that account. This concept is similar to the way Documents are displayed within the Document tab in an account.



Create New

Leads
Accounts
Opportunities
Spread
Projects
Contacts
Tasks
Notes
Documents
Categories
Products
Campaigns
Campaign Groups
Profiles

Reports

Search this site

Account Edit Opportunities (4) Tasks (2) **Notes (8)** Documents (9) Contacts (1) Projects (4)

Account Name	A B C Lock & Key	Account ID	23090
Salesperson	Alan Steiner	Account Type	Customer

+ new item

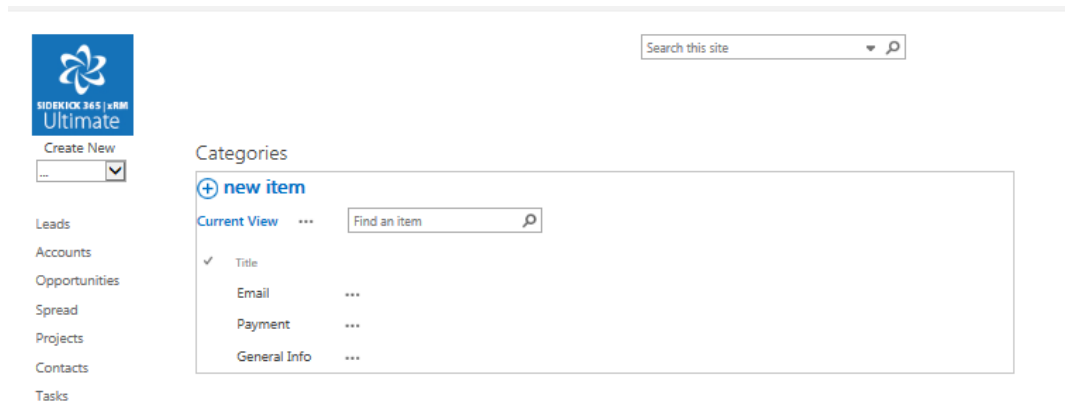
Current View Find an item

Title	Type	Follow Up Date	Email	Opportunity
Old Business Info	Background			ABC Lock and Key - 65 Pad Locks
Old Business Info	Background			ABC Lock and Key - 65 Pad Locks
Follow Up on 65 Pad Locks	To Do	8/26/2016	AlanS@skylitesystems.com	ABC Lock and Key - 65 Pad Locks
Follow Up on 65 Pad Locks	To Do	8/26/2016	AlanS@skylitesystems.com	ABC Lock and Key - 65 Pad Locks
called Lyndon	Phone Call	8/26/2016	AlanS@skylitesystems.com	
call Lyndon	To Do	9/29/2016	AlanS@skylitesystems.com	
Follow Up to close deal	To Do	11/25/2016	AlanS@skylitesystems.com	ABC Lock and Key - 5000 Door Locks - Madison Air Base
call Mel about Newtown High	To Do	9/22/2016	AlanS@skylitesystems.com	New ABC Deal at Newtown High School

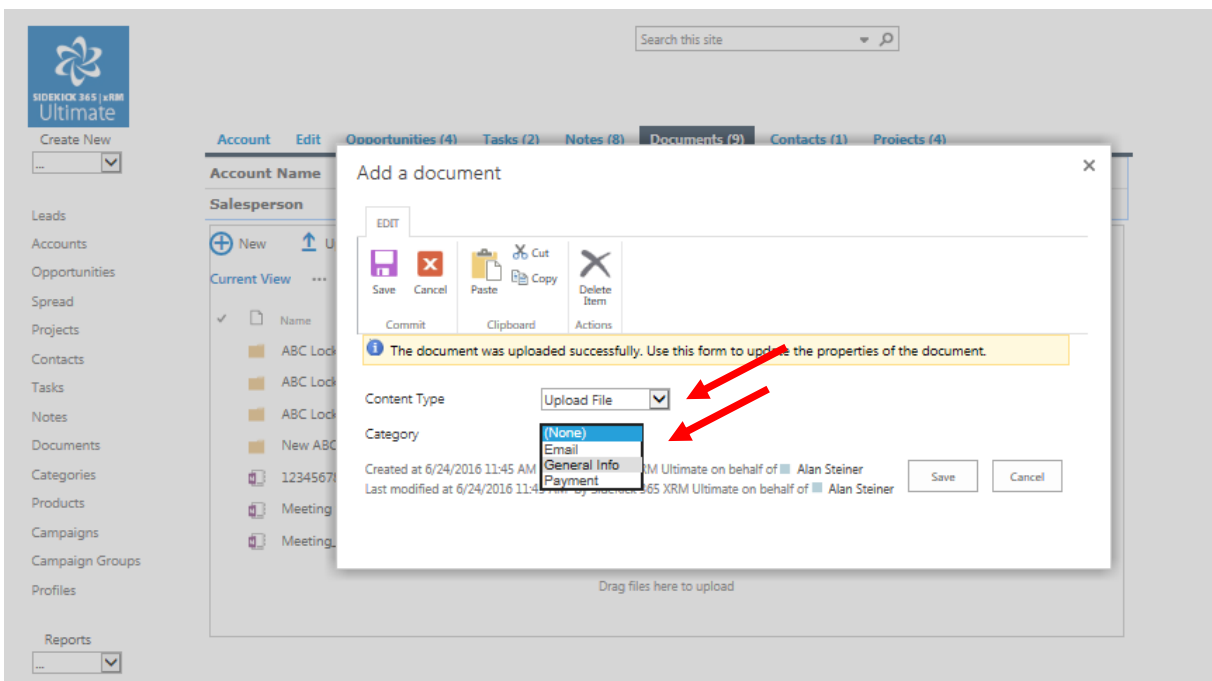
The next few modules - Categories and Profiles - are used by system administrators to help categorize uploaded files and to set security in the App.

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.

The screenshot shows a web browser window displaying the SideKick365 xRM Ultimate application. The browser's address bar shows the URL: <https://skylite-a610b108b6cb13.sharepoint.com/sites/xrm262/SitePages/Profiles.aspx>. The application's navigation bar includes links for File, Edit, View, Favorites, Tools, and Help. Below this, there are icons for Invoice and Suggested Sites. The main header of the application shows "XRM 2.6.2.0" and a series of links: Mail, Calendar, People, Yammer, Newsfeed, OneDrive, SharePoint, Tasks, and Documents. A "BROWSE" button is located below the header. On the left side, there is a sidebar with a "Create New" button and a list of modules: Leads, Accounts, Opportunities, Spread, Projects, Contacts, Tasks, Notes, and Documents. The main content area is titled "Profiles" and features a "new item" button. Below this, there is a table with the following structure:

✓	Title	Read Group	Edit Group
	Alan_S_Profile	Alan_S_Read	Alan_S_Contribute
	Brad_S_Profile	Brad_S_Read	Brad_S_Contribute

Products

The Products module lets you set up products that will appear within the Items grid 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 they could be – please email us at Info@SkyLiteSystems.Com if this is something you need.



Leads
Accounts
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Projects
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Campaign Groups
Profiles

Product **Edit**

Name *	Spring Hinge	Code	SP_HINGE
Type	Inventory		
Weight	2	Price	18.99
Cost	12	Inventory Count	234
Safety Stock Reorder	24		
Location	HQ		
Description	Spring Hinge with metallic finish		

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



Leads
Accounts
Opportunities
Spread
Projects
Contacts
Tasks
Notes
Documents
Categories
Products
Campaigns
Campaign Groups
Profiles

Account **Opportunity** **Edit** **Tasks (0)** **Notes (1)** **Documents (1)** **Contacts (0)** **Projects (0)**

Opportunity * ABC Lock and Key - 5000 Door Locks - Madison Air Base

Status Presentation Delivered **Salesperson *** Alan Steiner

Amount 167,790.00 **Probability** 75 %

Account * A & C Lock & Key **Main Contact** Lyndon Bellardine

Expected Close * 01/27/2017 **Close Date**

Outcome N/A **Profile** Alan_S_Profile

Campaign

Reason

Comments Want to relay all locks in base housing

Notes (1)

Type	Title	Notes	Follow Up Date	Email
To Do	Follow Up to close deal	ABC Lock and Key - 5000 Door Locks - Madison Air BaseCall to close the deal	11/25/2016	AlanS@skylitesystems.com

Items

Product	Code	Description	Qty	Cost	Price	Total Cost	Total Price
Blank Key Stock	KRISTDC	Blank key stock for making keys	7000	0.99	2.99	6930	20930
Cut a Key	KYCUT	Standard Rate to cut a key	7000	2.99	7.99	20930	55930
Yale Lock with Key	YALUWKK	Yale Lock with Key	7000	8.16	12.99	57120	90930

Set amount **84,980.00** **167,790.00**

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.

The screenshot shows the SideKick 365 xRM Ultimate interface. On the left is a navigation menu with options: Leads, Accounts, Opportunities, Spread, Projects, **Contacts**, Tasks, Notes, Documents, Categories, Products, Campaigns, and Campaign Groups. The main area is titled 'Contacts' and has a 'new item' button. A dropdown menu is open, showing options: 'All contacts', 'California' (highlighted with a red arrow), 'Manual Entry', 'Select Contacts', 'Modify this View', and 'Create View'. Below the dropdown is a table of contacts with columns: Name, Business Phone, Mobile Phone, Email Address, Job Title, Company, and Salesperson. The table lists 10 contacts, all of whom are from California.

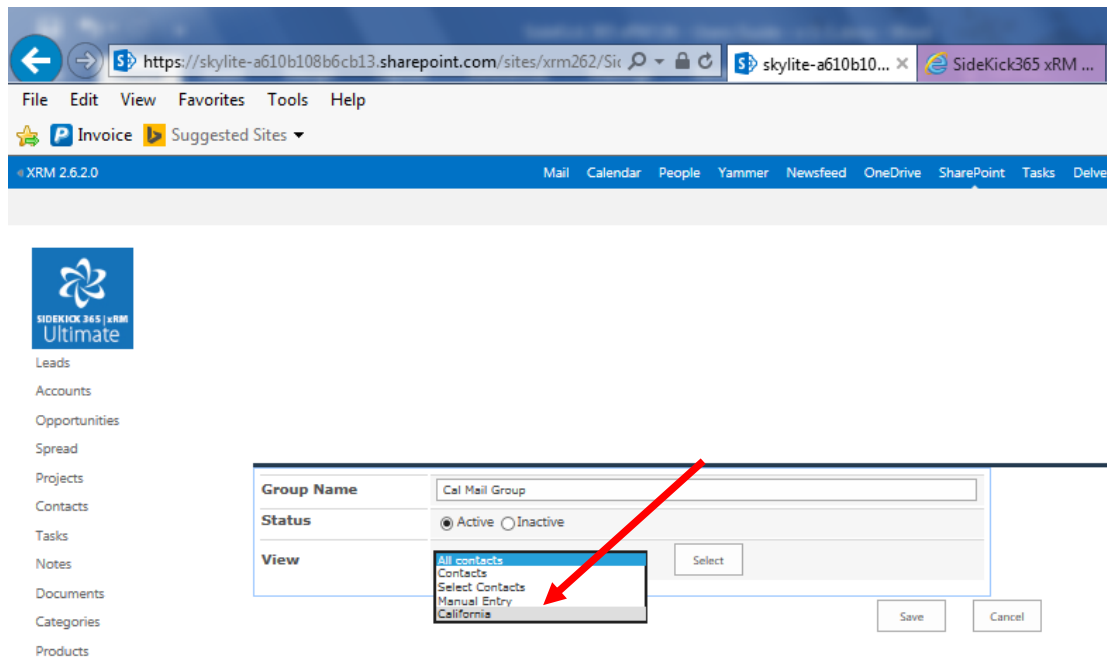
Name	Business Phone	Mobile Phone	Email Address	Job Title	Company	Salesperson
Adam Ant	(676) 090-8988	(111) 222-3333	AAnt@WestHillFarm.Org	King	West Hill Farms	Amy Adams
Aileen Mo	201-944-1664	201-944-3382	aileen@mottern.com	Buyer	Bennett Hallmark Cards	Brad Sutton
Alejandro	703-684-2882	703-684-8561	alejandro@mascall.com	Buyer	Railway Educational Bureau	Alan Steiner
Alene Rab	708-333-8056	708-333-2125	alene@rabeck.com	Operations	Bucks County Of	Alan Steiner
Alfonso Gr	419-634-3513	419-634-5733	alfonso@griglen.com	CIO	Paul D Friedman	Alan Steiner
Allie Pump	812-477-0753	812-477-4604	allie@pumphrey.com	CIO	Asher, Ronald L Md	Amy Adams
Alva Pennigton	904-260-2345	904-260-3735	alva@pennigton.com	Clerk	Citizens Savings Bank	Amy Adams
Alyssa Biasotti	845-343-1878	845-343-5354	alyssa@biasotti.com	Owner	Johnson Hardware Co	Alan Steiner
Amos Linnan	773-277-8332	773-277-4756	amos@linnan.com	Sales	Quincy, Jim	Amy Adams
Anneliese Schermerhorn	386-378-7869	386-378-1499	anneliese@schermerhorn.com	River	Safely Nixart Inc	Amy Adams

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

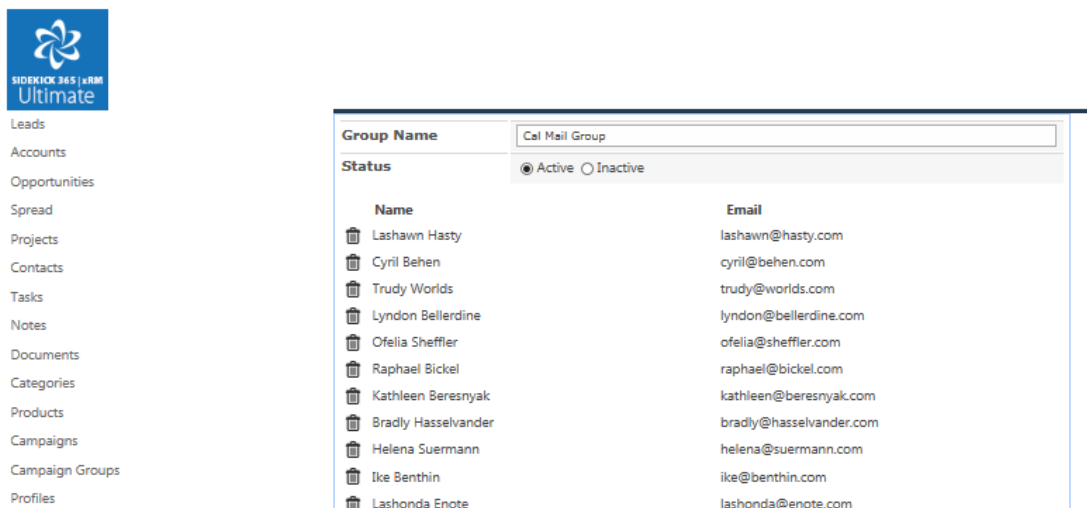
The screenshot shows the SideKick 365 XRM Ultimate interface. The top bar has the SideKick logo and the text 'SideKick 365 XRM Ultimate'. Below it is the title 'Contacts'. There is a 'new item' button and a link to 'edit this list'. The main area shows a table of contacts with columns: Name, Business Phone, Mobile Phone, Email Address, Job Title, Company, Salesperson, and State/Province. The table lists 10 contacts, all of whom are from California.

Name	Business Phone	Mobile Phone	Email Address	Job Title	Company	Salesperson	State/Province
Lashawn Hasty	626-960-6738	626-960-1503	lashawn@hasty.com	CIO	Kpff Consulting Engineers	Alan Steiner	CA
Cyril Behen	714-772-5050	714-772-3859	cyril@behen.com	Sales	National Paper & Envelope Corp	Amy Adams	CA
Trudy Worlds	661-257-3083	661-257-0924	trudy@worlds.com	CFO	Shapiro, Mark R Esq	Amy Adams	CA
Lyndon Bellerdine	415-705-1956	415-705-2887	lyndon@bellerdine.com	CIO	A B C Lock & Key	Alan Steiner	CA
Ofelia Sheffler	805-483-7161	805-483-5693	ofelia@sheffler.com	President	Rimpsey Agency	Alan Steiner	CA
Raphael Bickel	818-246-1195	818-246-4734	raphael@bickel.com	Buyer	S Shamash & Sons Inc	Alan Steiner	CA
Kathleen Beresnyak	650-349-6809	650-349-5962	kathleen@beresnyak.com	CSO	R & E Associates	Amy Adams	CA
Bradly Hasselvdar	310-374-2374	310-374-2363	bradly@hasselvdar.com	Owner	Public Works Department Office	Amy Adams	CA
Helena Suermann	650-965-0255	650-965-3368	helena@suermann.com	Operations	Stubenberge, James A Esq	Amy Adams	CA
Ike Benthin	415-255-5277	415-255-6543	ike@benthin.com	VP Safety	Lee, Harry Esq	Amy Adams	CA
Lashonda Enote	818-704-8490	818-704-7539	lashonda@enote.com	VP Safety	Nichols Village The Inn	Alan Steiner	CA

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



Leads
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Products

Name *	SkyLite Makes the Best SharePoint Apps
Type	Newsletter
Date of Email *	06/15/2016
Send Email	<input checked="" type="checkbox"/>
Description	General Interest Email Newsletter
Campaign Group *	Manual Entry
Subject Line *	This email was sent as a Campaign from SideKick365 xRM Ult :)

Rich text editor toolbar with icons for text formatting, alignment, and media insertion. A red arrow points to the 'Insert' icon (a small square with a plus sign).

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



Leads
Accounts
Opportunities
Spread
Projects
Contacts
Tasks
Notes
Documents
Categories
Products
Campaigns
Campaign Groups

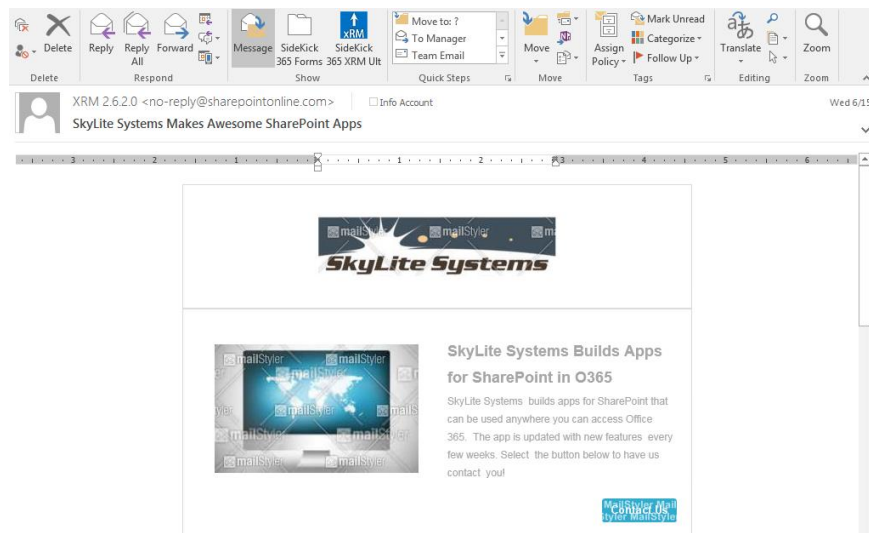
Name *	SkyLite Makes the Best SharePoint Apps
Type	Newsletter
Date of Email *	06/15/2016
Send Email	<input checked="" type="checkbox"/>
Description	General Interest Email Newsletter
Campaign Group *	Manual Entry
Subject Line *	This email was sent as a Campaign from SideKick365 xRM Ult :)

Rich text editor toolbar. A red arrow points to the 'Send Email' checkbox.

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 365. 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.

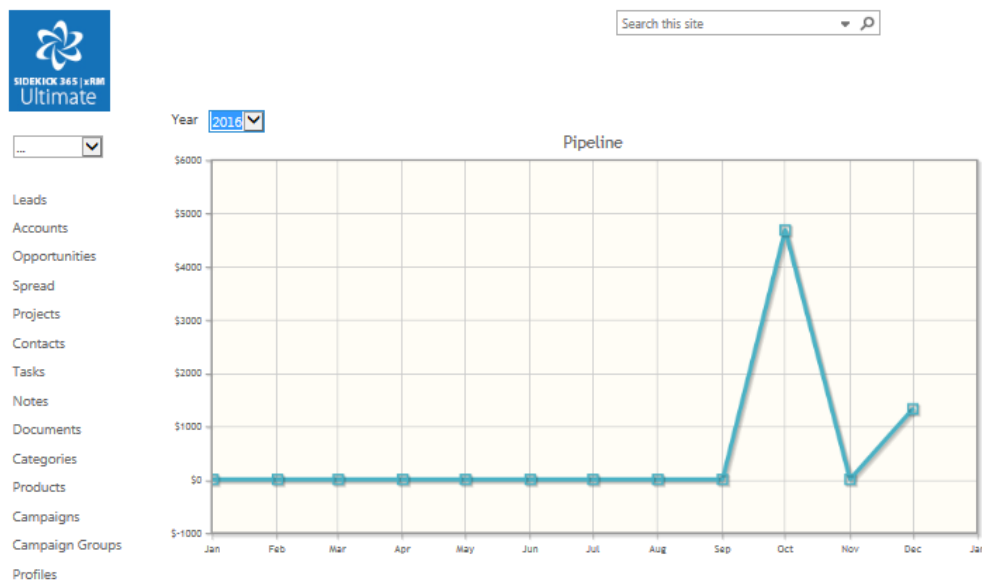
Tip - A detailed examination of reporting using these charts and custom list views follows in the next section of this guide.

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.

The screenshot displays the SideKick365 xRM Ultimate interface. On the left is a navigation menu with categories like Leads, Accounts, Opportunities, Projects, and Reports. The 'Reports' section is expanded, showing options like Pipeline, Pipeline By Salesperson, Sales By Month, and Sales By Salesperson. The main content area shows 'My Open Opportunities' with a table of data. The table includes columns for Title, Amount, Probability, Expected Close Date, Account, and Main Contact. The data is filtered by 'Current View' and 'Find an Item'.

Title	Amount	Probability	Expected Close Date	Account	Main Contact
ABC Lock and Key - 65 Pad Locks	\$844.35	75 %	10/28/2016	A B C Lock & Key	
ABC Lock and Key - 25 Yale Locks with Keys	\$285.00	75 %	10/28/2016	A B C Lock & Key	Lyndon Bellerdine
New ABC Deal at Newtown High School	\$2,598.00	50 %	10/28/2016	A B C Lock & Key	Lyndon Bellerdine
ABC Lock and Key - 5000 Door Locks - Madison Air Base	\$167,790.00	75 %	1/27/2017	A B C Lock & Key	Lyndon Bellerdine
Opp 7244	\$8,200.00	25%	4/1/2017	Perkins Photo Graphics Inc	Minh Leclaire
Opp 606	\$13,000.00	25%	4/1/2017	Postal Place At 111th Square	Hans Carlan
Opp 308	\$2,750.00	25%	4/1/2017	Reliable Optical	Jasmin Gum
Opp 693	\$2,960.00	25%	4/1/2017	Spectrum Constrcn and Dev Corp	Dionne Borycz
Opp 861	\$810.00	25%	4/1/2017	Fox and Killbride	Vernon Engelman
Opp 636		25%	4/1/2017	Wyckoff Florist and Gifts	Lana Garrigus

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





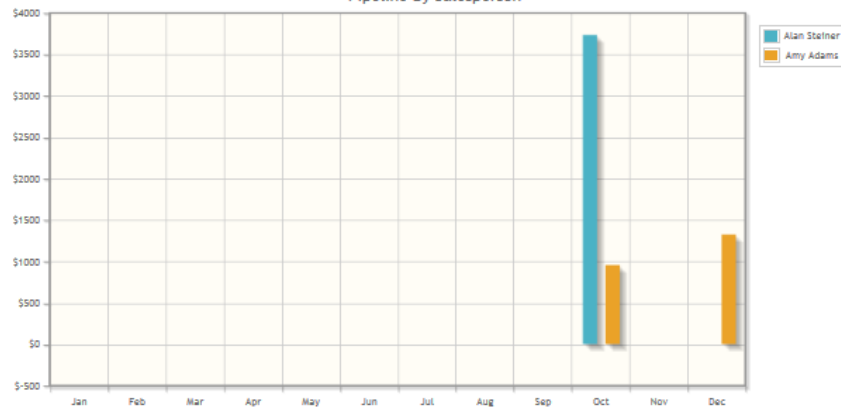
Search this site

...

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Tasks
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Categories
Products
Campaigns
Campaign Groups
Driveline

Year 2016

Pipeline By Salesperson



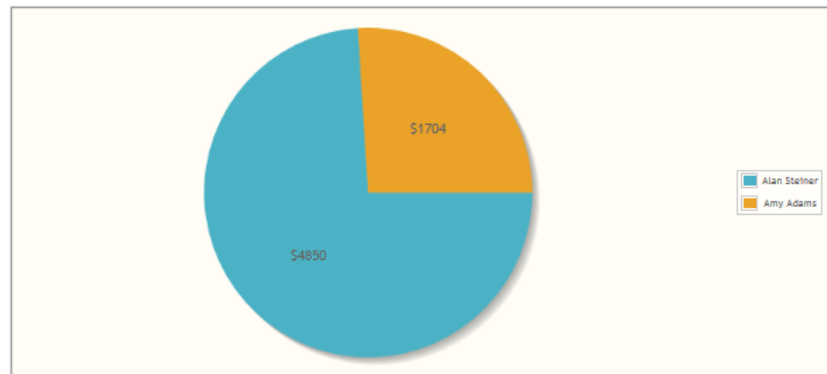
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Tip – Reports and Charts can be customized and additional reports can be created as needed. Just contact us at Info@skylitesystems.com to learn how.

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 SideKick365 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.

