

Lightspoke Solution Tour: Sales CRM

Lightspoke Now!

Lightspoke Sales CRM is a hosted CRM solution for sales force automation, customer relationship management. Because Lightspoke is delivered as a hosted service, sales organizations do not need to lose valuable time supporting and managing technology. As a web application, Lightspoke is as intuitive as the web and offers a gradual learning curve. This allows customers to focus on their business, not constantly training new sales reps. With CRM management, companies can begin to strategically manage their sales activities, resulting in higher volume and profits.

The benefits of using Lightspoke Sales CRM are immediate:

Extensible CRM Applications

Instant Deployment: 1 Day

Quick ROI: Within 30 Days

Focus on Selling

Lightspoke Sales CRM provides your sales team with a 360 degree view of your customers accounts. Close more deals with Lightspoke by:

1. Optimizing your sales pipeline
2. Identifying stuck opportunities
3. Prioritizing and qualify leads

Since Lightspoke is an application service provider, there is nothing to install and minimal training required. Your group can be up and running within the day. Furthermore, upgrades are transparent and customization support can be offloaded.

Access Sales Information Anywhere

Gone are the days of calling into the sales office to get price lists, status updates, etc. Now with Lightspoke Sales CRM, your mobile sales team can get all the benefits of CRM on the road. Increase your people's productivity on the road.

Benefits

Don't let opportunities slip through the cracks! Since every lead is immediately recorded, no opportunity goes unnoticed. Also, stuck opportunity reports tell identify opportunities that are slowing down.

Better Team Selling. Every member of your sales force can immediately get up-to-date on any customer. Your sales team can now collaborate better on large deals that require multiple sales reps.

Better Customer Management. Easy access to real-time sales information for everyone enables collaboration between sales, service, and marketing. With instant access to all customer communication and data, you can collectively manage customer relationships across your entire organization.

Better Forecasting. Once you begin using Lightspoke Sales CRM, your sales pipeline and accounts becomes transparent and always up-to-date. No more broad stroke guesses at what the end of the month will turn out!

Understand Your Sales Cycle. Time based reports of your historical sales activities can help you identify bottlenecks in your sales process. Lightspoke Sales CRM allows you to understand your sales process and meet strategic milestones.

Grand Tour

The Lightspoke Sales CRM application comprises over 50 database tables, views / reports forms and tasks. However, the best way to work with all of these objects is through the Sales CRM dashboards. The dashboards tie all of the Sales CRM objects together in a convenient and easy to use interface.

The dashboards are as follows:

- Home (Activity / Tasks)
- Opportunities
- Accounts
- Contacts
- Cases

Task Management

Help sales teams collaborate by assigning tasks tied to accounts. Track all account-related activities tied to individual sales reps. Identify ownership and accountability on all sales opportunities.

The *Home* dashboard of the Sales CRM application is designed for individual activity management. The *My Open Tasks* panel shows a “to do” list for the individual who has logged in. The *Active Accounts* panel shows all of the accounts that have activity owned by the sales rep who has logged in. On the left, the *Task Quick Create* panel allows the user to enter in a new task and tie the new task to an account.

The screenshot shows the Lightspoke Sales CRM application interface. At the top, there is a navigation bar with the Lightspoke logo, a history/shortcuts/clipboard menu, and a user welcome message: "Welcome Live Demo #1 (logout)". Below this is a secondary navigation bar with tabs for Applications, Tables, Views, Forms, and Tasks, along with a search bar and a dropdown for "All Tables".

The main content area is divided into several sections:

- Welcome to Lightspoke Sales CRM!**: A introductory message stating, "The Sales CRM application provides a 360 degree view of your entire sales cycle. It can help your team members collaborate better and work smarter."
- Search**: A search bar with the text "Find:" and a dropdown menu labeled "Tables in Sales CRM" with a "go" button.
- My Open Tasks**: A table showing tasks assigned to the user. Callout: "Shows open tasks for the logged in user."
- Active Accounts**: A table showing accounts with activity. Callout: "Shows all accounts that are in the sales cycle for the logged in user."
- Task Quick Create**: A form for creating new tasks. Callout: "Quickly add new tasks tied to accounts."

Callouts also explain the search bar: "Search bar searches for data only in tables within the Sales CRM Application."

| id | name | assigned to | due | priority | status | name | id |
|------|--|----------------------|----------|----------|-------------|------------------------|------|
| 1294 | Have lunch with VP | demo1@lightspoke.com | 10/25/03 | High | Not Started | CISCOL - 20000 Gidgets | 1286 |
| 1293 | take a look at the new "Sales / Crm" application | demo1@lightspoke.com | 10/25/03 | Low | Not Started | P&G 100 Gidgets | 1281 |

| name | owner | department | acctno | industry | rating | phone | wa |
|-----------------------------|----------------------------------|----------------------------|--------|-----------------|--------|--------------|-----|
| Walt Didley & Co | template.salesorm@lightspoke.com | animation | 1271 | Entertainment | Cold | 973.555.3654 | www |
| Universal Business Machines | demo1@lightspoke.com | consumer electronics | 1269 | Electronics | Cold | 212.555.1241 | www |
| CISCOL Systems | demo1@lightspoke.com | value add network services | 1283 | Communications | Warm | 415.555.6123 | www |
| Proctor & Gordon | demo1@lightspoke.com | canned products | 1270 | Food & Beverage | Hot | 313.555.1478 | www |
| Walt Didley & Co | template.salesorm@lightspoke.com | animation | 1271 | Entertainment | Cold | 973.555.3654 | www |

Opportunity Management

Manage your sales pipeline by getting a real time look at all the live opportunities in your organization in the *Opportunity Pipeline* panel. New opportunities can be quickly added here and tied to existing or new accounts. *Opportunities by Stage* lets you view only opportunities in a particular stage of your sales cycle. For instance, if you wanted to know all the opportunities in the “prospecting” or the “proposal submitted” stage.

The screenshot displays the Lightspoke CRM interface. At the top, there is a navigation bar with the Lightspoke logo, a menu (Applications, Tables, Views, Forms, Tasks), a search bar, and a user welcome message. Below this is a sub-navigation bar with tabs for Home, Opportunities (selected), Accounts, Contacts, and Cases. The main content area is divided into several sections:

- Search:** A search bar with a "Find:" label and a dropdown menu for "Tables in Sales CRM".
- Opportunity Quick Create:** A form with fields for name, account, owner, type (set to "Existing Business"), lead source, and amount. It includes "toggle" links and a "go" button.
- Opportunity Pipeline:** A table showing a list of opportunities with columns for id, name, owner, amount, close date, next step, and stage.
- Opportunities by Stage:** A section with a "Criteria Selection:" label and a dropdown menu set to "Prospecting", with a "go" button.
- Reports:** A section with a link to "Run View Tasks by Status".

Four callout boxes provide additional context:

- "Shows all live opportunities in the sales process" points to the Opportunity Pipeline table.
- "Quickly create new opportunities and tie them to accounts" points to the Opportunity Quick Create form.
- "Shows opportunities for a given stage in sales cycle" points to the Opportunities by Stage dropdown.
- "Access to other sales pipeline reports" points to the Reports section.

| id | name | owner | amount | close date | next step | stage |
|------|---|----------------------------------|-------------|------------|-------------------------------------|--------------------|
| 1290 | Didley - Walt 30 Rigs Didley & Co | template.salescrm@lightspoke.com | \$45,300.00 | 01/05/03 | draw up initial proposal | Needs Ana |
| 79 | UBM - Universal 10000 Business Gidgets Machines | demo1@lightspoke.com | \$21,000.00 | 11/15/03 | draft revised proposal | Negotiation |
| 1286 | CISCOL -20000 Gidgets Systems | demo1@lightspoke.com | \$41,500.00 | 11/05/03 | waiting for response | Proposal/ Quote |
| 1281 | P&G 100 Gidgets | demo1@lightspoke.com | \$0.00 | 06/05/03 | demo effectiveness of gidgets | Qualificati |
| 1280 | Didley - Walt 15000 Didley & Gidgets Co | demo1@lightspoke.com | \$36,000.00 | 01/05/04 | lunch with CFD | Value Prop |

Account Management

Manage your accounts by using the *Active Accounts* view to identify accounts that need attention. The *My Accounts* panel shows the sales rep who is logged in active accounts that they are accountable for. Other reports include *Accounts sorted by Inactivity* help managers and sales people identify stagnating accounts.

Home | **Opportunities** | **Accounts** | **Contacts** | **Cases**

Search
Find:
Tables in Sales CRM

Quickly create new accounts

Account Quick Create

name
owner
[toggle](#)
department
acctno
industry
[toggle](#)
annual revenue

Reports

- [Run View:Sales CRM.All Accounts](#)
- [Run View:Sales CRM.My Accounts](#)
- [Run View:Sales CRM.Active Accounts](#)
- [Run View:Sales CRM.Accounts Sorted by Inactivity](#)

My Accounts

| name | owner | department | acctno | industry | rating | phone | web |
|-----------------------------|----------------------|----------------------------|--------|-----------------|--------|--------------|----------------|
| CISCOL Systems | demo1@lightspoke.com | value add network services | 1283 | Communications | Warm | 415.555.6123 | www.cisool-sys |
| Proctor & Gordon | demo1@lightspoke.com | canned products | 1270 | Food & Beverage | Hot | 313.555.1478 | www.proctora |
| Universal Business Machines | demo1@lightspoke.com | consumer electronics | 1269 | Electronics | Cold | 212.555.1241 | www.ubm-glo |

Shows all active accounts

Shows accounts tied to logged in user

Active Accounts

| name | owner | department | acctno | industry | rating | phone | web |
|-----------------------------|----------------------------------|----------------------------|--------|-----------------|--------|--------------|-----|
| Walt Didley & Co | template.salescrm@lightspoke.com | animation | 1271 | Entertainment | Cold | 973.555.3654 | www |
| Universal Business Machines | demo1@lightspoke.com | consumer electronics | 1269 | Electronics | Cold | 212.555.1241 | www |
| CISCOL Systems | demo1@lightspoke.com | value add network services | 1283 | Communications | Warm | 415.555.6123 | www |
| Proctor & Gordon | demo1@lightspoke.com | canned products | 1270 | Food & Beverage | Hot | 313.555.1478 | www |
| Walt Didley & Co | template.salescrm@lightspoke.com | animation | 1271 | Entertainment | Cold | 973.555.3654 | www |

Other Accounts related reports

Contacts Management

Store and retrieve your contacts in the Contacts dashboard. The *My Contacts* views shows each individual sales person his or her contacts. Below, the *Find Contacts by Name* query helps your team find contacts. *Contact Quick Create* lets users quickly create new contacts.

The screenshot shows the CRM interface with a navigation bar at the top containing 'Home', 'Opportunities', 'Accounts', 'Contacts', and 'Cases'. The 'Contacts' tab is active. On the left, there is a 'Search' section with a 'Find:' input field containing 'ciscol' and a 'Tables in Sales CRM' dropdown menu with a 'go' button. Below this is a 'Contact Quick Create' form with fields for name, owner (demo1@lightspoke.com), account (CISCOL Systems), title, birthday (02/28/04), and reports to. A callout bubble points to the 'go' button in the search section with the text 'Quickly create new contacts'. Below the form is a 'Reports' section with links: 'Run View.Sales CRM.Find Contacts by Name', 'Run View.Sales CRM.Find Contacts by Account', 'Run View.My Contacts', and 'Run View.All Contacts'. A callout bubble points to these links with the text 'Reports that help manage contacts'. The main content area is titled 'My Contacts' and contains a table with columns: name, owner, name, title, phone, email, and add. The table lists six contacts: Daisy Buchanan, George Wilson, Jordan Baker, Myrtle Wilson, and Nick Carraway. A callout bubble points to the 'owner' column with the text 'Contacts owned by the login in user'. Below the table is a 'Find Contacts by Name' section with a 'Criteria Selection:' label and a 'name contains' input field containing 'Wilson', followed by a 'go' button. A callout bubble points to this section with the text 'Find contacts by name'.

| name | owner | name | title | phone | email | add |
|----------------|----------------------|-----------------------------|-------------------------------------|--------------|--------------------------------|-----|
| Daisy Buchanan | demo1@lightspoke.com | Proctor & Gordon | CTO | 973.555.6511 | dbuchanan@proctorandgordon.com | |
| George Wilson | demo1@lightspoke.com | Universal Business Machines | Executive VP Sales | 313.555.9633 | george_wilson@ubm.com | |
| Jordan Baker | demo1@lightspoke.com | Universal Business Machines | VP Marketing | 313.555.9122 | jordan_baker@ubm.com | |
| Myrtle Wilson | demo1@lightspoke.com | CISCOL Systems | Director Value Add Network Services | 415.555.9611 | myrtlew1@ciscol-systems.com | |
| Nick Carraway | demo1@lightspoke.com | Proctor & Gordon | Director IT | 212.555.4987 | ncarraway@proctorandgordon.com | |

Find Contacts by Name

Criteria Selection:
name contains

Run View.Sales CRM.Find Contacts by Name
Run View.Sales CRM.Find Contacts by Account
Run View.My Contacts
Run View.All Contacts

Case Management

Successful issues handling of existing customers is a key component to CRM. The *Cases* dashboard helps sales reps or support specialists track customer issues. *My Open Cases* show the logged in user any cases they are responsible for. The *Cases by Priority* query lets your sales staff find the most important cases quickly. *Cases Quick Create* lets users quickly create new cases.

Application Home: Sales CRM

The screenshot shows the 'Cases' section of a CRM application. At the top, there is a navigation bar with tabs for Home, Opportunities, Accounts, Contacts, and Cases. Below this, the 'My Open Cases' section displays a table of cases assigned to the user. A callout points to the 'Case Quick Create' form, which includes fields for subject, description, assigned to, type, reason, and status. Another callout points to the 'Cases by Priority' section, which allows filtering cases by priority. A third callout points to the 'Reports' section, which provides links to various case reports. A fourth callout points to the 'My Open Cases' table, indicating it shows cases for the logged-in user.

| subject | description | assigned to | type | reason | status | priority | last update | id | contact |
|----------------|---|----------------------|---------|-------------|-------------|----------|---------------|------|---------|
| UBM Gidgets | gidgets were spe'd out to malfunction above 550Mhz. | demo1@lightspoke.com | Problem | New problem | In Progress | High | 09/01/03 1292 | 1275 | |

Search
Find:
Tables in Sales CRM

Case Quick Create
subject:
description:
assigned to: demo1@lightspoke.com
type: --None--
reason: --None--
status:

My Open Cases

Cases by Priority
Criteria Selection:
priority contains: High

Reports
[Run View:My Open Cases by Priority](#)
[Run View:Cases by Status](#)
[Run View:All Open Cases by Priority](#)
[Run View:All Open Cases](#)
[Run View:Sales CRM.My Open Cases](#)

Additional reports to help manage customer issues

Shows open cases for logged in user

Shows cases based on their importance

Create new customer case / issue

Extensible and Customizable

The above tour is the default layout of the Lightspoke Sales / CRM application. However, the application can be configured in any way you want. The dashboard can be completely reconfigured. Fields can be changed, added or removed from each of the Sales CRM tables. Views can be added or modified with a few simple clicks.

Customizing Dashboards

The following screen shot shows how easy it is to reconfigure the dashboards in Lightspoke.

The screenshot shows the 'Update Panel: Opportunity Quick Create' configuration screen. The interface includes a top navigation bar with 'Applications', 'Tables', 'Views', 'Forms', and 'Tasks' tabs. A search bar and a dropdown menu for 'All Tables' are also present. The main configuration area is divided into several sections:

- Panel Title and Location:** A section with a text input for 'Enter Panel Title' (containing 'Opportunity Quick Create') and a dropdown for 'Select Location of Panel' (set to 'Left Panel').
- Panel Text:** A section with two text input fields for 'Content Top' and 'Content Bottom'.
- Actions to perform in panel:** A section with a dropdown for 'Choose Embedded Action to Execute within Panel' (set to 'Single Record Form') and a dropdown for the specific action (set to 'Sales CRM.Opportunity Quick Create').
- Links to application views, tables, forms:** A section with a checkbox for 'Search only in Application Tables' and a table of links to place in the panel.

| Row Quick View | View | Form Single Record Form | Task |
|--|--|--|--------------------------|
| <input type="checkbox"/> Sales CRM.Opportunities | <input type="checkbox"/> Sales CRM.My Accounts | <input type="checkbox"/> Sales CRM.Case Quick Create | <input type="checkbox"/> |
| <input type="checkbox"/> Sales CRM.Tasks | <input type="checkbox"/> Sales CRM.My Open Tasks by Priority | <input type="checkbox"/> Sales CRM.Account Quick Create | |
| <input type="checkbox"/> Sales CRM.Cases | <input type="checkbox"/> Sales CRM.All Contacts | <input type="checkbox"/> Sales CRM.Opportunity Quick Create | |
| <input type="checkbox"/> Sales CRM.Accounts | <input type="checkbox"/> Sales CRM.All Contacts | <input type="checkbox"/> Sales CRM.Contact Quick Create | |
| <input type="checkbox"/> Sales CRM.Opportunities | <input type="checkbox"/> Sales CRM.My Open Opportunities | <input type="checkbox"/> Sales CRM.Account Quick Create | |
| <input type="checkbox"/> Sales CRM.Tasks | <input type="checkbox"/> Sales CRM.Closed Opportunities | <input type="checkbox"/> Sales CRM.Task Quick Create | |
| <input type="checkbox"/> Sales CRM.Cases | <input type="checkbox"/> Sales CRM.My Contacts | <input type="checkbox"/> Defect Tracker.Defect Quick Create | |
| <input type="checkbox"/> Sales CRM.Opportunities | <input type="checkbox"/> Sales CRM.My Open Cases by Priority | <input type="checkbox"/> Defect Tracker.Change Status On My Open Defects | |
| <input type="checkbox"/> Defect Tracker.Group | <input type="checkbox"/> Sales CRM.All Accounts | <input type="checkbox"/> Defect Tracker.Change Status On All Defects | |

Customizing Tables

The following screen shot shows how easy it is to modify fields inside existing tables – or to simply create new tables.

Lightspoke

HISTORY: Edit Table: Sales CRM.Opportunities
SHORTCUTS: Create Table: Sales CRM.Opportunities
CLIPBOARD: table home

Applications Tables Views Forms Tasks

Edit Table

Table Design: Sales CRM.Opportunities

Pages to add, edit and order fields

1. Add Fields
2. Edit Fields
3. Order Fields

Task Actions:
[Add Fields](#)
[Edit Fields](#)
[Order Fields](#)

Edit existing fields of the table here. To perform other actions associated with designing table structure, look underneath Task Actions.

| X | Field Name | Field Type | Multiple | Dependencies |
|--------------------------|-------------|----------------|-------------------------------------|----------------------------|
| <input type="checkbox"/> | name | Text | <input type="checkbox"/> | |
| <input type="checkbox"/> | account | MultipleChoice | <input type="checkbox"/> | Dependency |
| <input type="checkbox"/> | owner | MultipleChoice | <input type="checkbox"/> | Dependency |
| <input type="checkbox"/> | type | MultipleChoice | <input type="checkbox"/> | |
| <input type="checkbox"/> | lead source | MultipleChoice | <input type="checkbox"/> | |
| <input type="checkbox"/> | amount | Percent | <input type="checkbox"/> | |
| <input type="checkbox"/> | close date | Phone | <input type="checkbox"/> | |
| <input type="checkbox"/> | next step | Date | <input type="checkbox"/> | |
| <input type="checkbox"/> | stage | Time | <input type="checkbox"/> | |
| <input type="checkbox"/> | reliability | Duration | <input type="checkbox"/> | |
| <input type="checkbox"/> | notes | YesNo | <input type="checkbox"/> | |
| <input type="checkbox"/> | last update | Email | <input type="checkbox"/> | |
| <input type="checkbox"/> | id | Url | <input type="checkbox"/> | |
| <input type="checkbox"/> | | File | <input type="checkbox"/> | |
| <input type="checkbox"/> | | MultipleChoice | <input checked="" type="checkbox"/> | |
| <input type="checkbox"/> | | Id | <input type="checkbox"/> | |
| <input type="checkbox"/> | | Date | <input type="checkbox"/> | |
| <input type="checkbox"/> | | Id | <input type="checkbox"/> | |

Single Record Table:

Modify field names and properties

Customizing Views

The following screens shot shows how easy it is to modify views – or to simply create new views.

This screen shows the criteria page where business users can limit the records returned in a view. This particular screen shows a business user interested in knowing only opportunities that are NOT closed or open while at the same time, the opportunity must be owned by the person who is currently logged in.

View Design: Sales CRM.My Open Opportunitie

- 1. Construct Query
- 2. Choose Columns
- 3. Sort View
- 4. Group View
- 5. Calculate View
- 6. Summary View
- 7. Preview

Task Actions:
[Construct Query](#)
[Choose Columns](#)
[Sort View](#)
[Group View](#)
[Calculate View](#)
[Summary View](#)
[Preview](#)

Configure criteria selection of view. This specifies that the stage of the opportunity must be "closed"

Add new fields to a table here. To perform other actions associated with designing table structure, look underneath Task Actions.

| Field | Not Condition | Criteria | To be entered at runtime |
|-------------------------------|-------------------------------------|-----------------|--------------------------|
| Sales CRM.Opportunities.stage | <input checked="" type="checkbox"/> | contains closed | <input type="checkbox"/> |
| Sales CRM.Opportunities.owner | <input type="checkbox"/> | contains @EMAIL | <input type="checkbox"/> |

Description:

The next screen shot shows how a business user can limit the columns shown in the view.

View Design: Sales CRM.My Open Opportunitie

1. Construct Query
2. Choose Columns
3. Sort View
4. Group View
5. Calculate View
6. Summary View
7. Preview

Task Actions:
Construct Query
Choose Columns
Sort View
Group View
Calculate View
Summary View
Preview

Choose columns to include in view

Select columns to include in your view

| | |
|-------------------------------------|-------------------------------------|
| Sales CRM.Opportunities.type | Sales CRM.Opportunities.name |
| Sales CRM.Opportunities.lead source | Sales CRM.Opportunities.account |
| Sales CRM.Opportunities.notes | Sales CRM.Opportunities.owner |
| | Sales CRM.Opportunities.amount |
| | Sales CRM.Opportunities.close date |
| | Sales CRM.Opportunities.next step |
| | Sales CRM.Opportunities.stage |
| | Sales CRM.Opportunities.reliability |
| | Sales CRM.Opportunities.last update |
| | Sales CRM.Opportunities.id |

save

There are many more aspects to Lightspoke that is not illustrated in this solutions tour of the Sales CRM application. However, this tour should have demonstrated the benefits of the Lightspoke Sales CRM web application.

About Lightspoke

Lightspoke is an extremely powerful business tool that empowers the end users to take control of his or her application's functionality and behavior. Our vision is simple: "to become the world's most useful web application." And our mission is to provide unsurpassed utility to organizations seeking web-based business applications. We do this by developing a technology platform that delivers custom web applications on-the fly and empowers end users with the ability to shape their own applications.

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