Using Contact and Sale Custom Fields in WorkCenterU Software

When you are considering renaming your custom sale opportunity fields inside the software, please keep in mind that you can you are creating database fields that can be used for currency amounts and also opportunities that may not be structured as a dollar sale. WorkCenterU comes standard with 245 custom fields that you can rename to fit your personal database needs. These fields range from text, numbers, dates and YesNo fields.

When you read this information guide you will see examples of how we will use Sale Opportunity fields to track items other than currency sales and which may never turn into an actual currency sale.

What are "Custom Fields" inside WorkCenterU Software?

WorkCenterU is a contact management and customer relationship management software solution for individuals and small businesses. WorkCenterU comes standard with Contact and Sale Opportunity fields. Many of the Contact fields have already been named for your use and convenience. The Sale Opportunity fields comprise of 245 custom fields that can be renamed to meet your personal needs. When you purchase WorkCenterU, you will also have the option to acquire an industry specific software package. This industry specific software package will have many of the Sale Opportunity Custom Fields already renamed for you use. You will also have the option to rename and use additional Sale and Contact custom fields to meet specific needs for your personal or business operations.

Contact Custom Fields:

WorkCenterU has over 150 contact fields already named for your use with the software. The software in addition to the named fields also has 50 contact custom fields that you can rename for your personal use and to assist you in streamlining your software and ability to contact customers.

Additional Contact Custom Fields:

WorkCenterU has 50 custom fields that you can rename to meet your specific operational needs. They are listed below:

10 Text Fields: Text1-10
10 Drop Down Text Fields: DDText01-10
10 Date Fields: Date1-10
10 Number Fields: Number1-10
10 YesNo Fields: YesNo1-10

Text Fields: Can be used for both alpha and numeric characters

Text Drop Down Fields: Can be used for both Alpha and numeric characters and you can create supporting lists for the fields

Date Fields: Can be used for specific dates in different formats

Number Fields: Number fields by design are integers or single numbers with no decimals

YesNo Fields: YesNo fields are either Yes (True) or No (False) and are designed as check boxes

If you click on Tools, Setup Options, Options Lists button and select "Contact Custom Fields" Inside your WorkCenterU software. You will see the following custom fields displayed. To rename these to meet your personal needs, simply type the new name to the right of the "=" sign. We also suggest that you keep the default Text1=SaleID name. This will be explained in greater detail in the user guides.

Text1= SaleID	**Number1=**
Text2=	**Number2=**
Text3=	**Number3=**
Text4=	**Number4=**
Text5=	**Number5=**
Text6=	**Number6=**
Text7=	**Number7=**
Text8=	**Number8=**
Text9=	**Number9=**
Text10=	**Number10=**
DDText01=	**YesNo1=**
DDText02=	**YesNo2=**
DDText03=	**YesNo3=**
DDText04=	**YesNo4=**
DDText05=	**YesNo5=**
DDText06=	**YesNo6=**
DDText07=	**YesNo7=**
DDText08=	**YesNo8=**
DDText09=	**YesNo9=**
DDText10=	**YesNo10=**
Date1=	**Date6=**
Date2=	**Date7=**
Date3=	**Date8=**
Date4=	**Date9=**
Date5=	**Date10=**

Contact Sale Opportunity Custom Fields:

WorkCenterU comes standard with 245 custom Sale Opportunity Fields. If you have not acquired a particular industry model when you purchased WorkCenterU, these are the fields that you have to rename and design your database to meet your personal or business needs.

Text01-60 Fields: Can be used for alpha and numeric characters.
DDText01-35 Fields: These custom fields can be renamed and you can create a drop down text selection menu
Dates01-30 Fields: These are 30 date fields that can be used with different date formats
Currency01-40 Fields: These are dollar formatted fields with 2 decimal points
Number01-20 Fields: These are integer number fields (no decimals)
Float01-20 Fields: These are number fields that come standard with up to 4 decimals
YesNo01-40 Fields: These are Yes (True) or No (False) check box fields
If you elect to acquire an industry programmed WorkCenterU software package, some of these sale opportunity fields will be automatically renamed to meet the industry needs. You always have the option to rename these fields to enhance your software performance for your personal needs.

<u>Example for: Renaming Custom Fields for you personal use with WorkCenterU:</u>

One of our clients came to us and asked for our evaluation on how to best setup their WorkCenterU software to meet their personal and business needs. Their business revolved around managing business properties, especially hotel properties. They had many needs to be fulfilled.

This company holds multiple seminars across the county attracting prospective clients. They were very comfortable with being able to track the contact records and information since they have used Outlook in the past. Here are the major items they wanted to track on the sale opportunity side of their business.

1. Individual sales of services (management, consulting and other revenues)
2. Track individual events (seminars given across the country)
3. Who was invited to these events
4. Who responded Yes or No that they would be attending
5. Who actually attended the conference
6. Who became a customer of the Company after they attended one of the events

<u>Contact Information Evaluations "How They Used WorkCenterU CRM":</u>

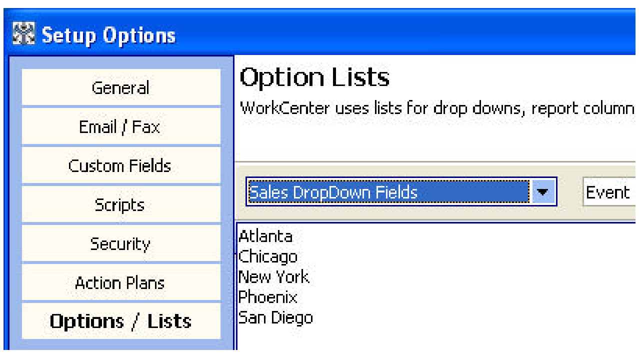
1. The client has lists of contacts that they sent out email and letter invitations
2. The client entered all of these prospects into WorkCenterU by using our Excel import wizard
3. They also manually added contacts into the WorkCenterU software
4. They imported their business outlook contacts in the database by using the Outlook synchronization buttons built into the software.
5. These steps above created the client contact information inside WorkCenterU
6. We suggested that they take their original events lists and use three "Contact Custom Fields" in the software to mark their contact records. We then used a Contact Text Field (for their purpose, Text01=Lead Source) to identify the contact record where they came from; then we used a Contact Custom Date Field (for their purpose Date01=Lead Date) to mark the contact table information to specify when the contact record was added to the database; the last field we renamed in their database was a second Contact Custom Date Field (for their purpose we used Date02=Remove). Many of our software users will substitute the name "Convert Date" rather than "Remove".
7. Why three contact custom fields?
    a. Lead Source will identify how we originally found and added the contact to the database
    b. Lead Date will tell us when we added the "prospect" to our database
    c. Remove Date will tell us when this prospect was converted into a real client of the business
    d. With the three fields, we are able to track where and when the client was added and also when the client was converted. This will give us a timeline to evaluate conversion rates and times.
8. Please keep in mind that the client has other needs to track contact information and they used the existing named fields (contact name, company, email, phone numbers, etc.) and some of the other custom fields to meet their needs. These small changes we taken from our user guide "Tracking Leads Cradle to Grave" found through the WorkCenterU software or on our website under "Training/Support".

<u>Sale Opportunity Information Evaluations "Thought Process":</u>

1. We now need to track the client events and other data revolving around these seminars. As described above, WorkCenterU has 245 custom "Sale Opportunity" fields that can be renamed to adapt to any industry.

2. Keep in mind the custom “Sale Opportunity Fields” can be used to track actual sales and income and also “opportunities” for sales. To track contacts and events, we took the following sale opportunity custom fields and renamed them for our database.
   a. **<u>Text01=SaleID</u>**: (this will be used as a base field to bring in opportunity items and list them under the specified contact record)

   b. **<u>Date01=Event Date:</u>** (this will track the actual date of the event)
   c. **<u>DDText01=Event-DDT:</u>** (this will be used to track the city or special event held)
   d. **<u>YesNo01=Invited-YN:</u>** (Yes (True) or No (False) field to identify the prospect was invited)
   e. **<u>YesNo02=Responded-YN:</u>** (Did the prospect respond Yes or No that they would attend)
   f. **<u>YesNo03=Coming-YN:</u>** (Did the client indicated Yes or No that they would be attending)
   g. **<u>YesNo04=Attended-YN:</u>** (Did the prospect attend the meeting)
3. For the next step, we will now add a list behind the custom DDText01 field we named as “Event-DDT” in #2c above. This year the client is planning on a minimum of 5 major events across the country (Atlanta; Chicago; New York; Phoenix; and San Diego). We added those names to the drop down list inside WorkCenterU.



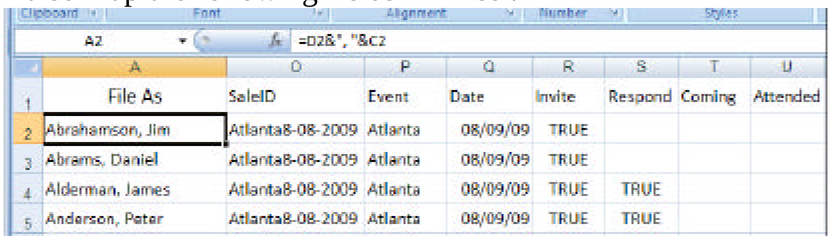
Suggestion: Add an extension letter or designation to the end of each of your custom fields. This will become very beneficial when working with reports, entering data into contact records and using the WorkCenterU data import wizard.

We suggest the following entered directly after the custom name field:
Text fields: -T i.e Event-T
Date Fields – Date at the end of the name i.e. Event Date
Currency - $ - Sale Amount-$
Number – N – employees-N
Float- F # units-F
Text Drop Down (DDText) – DDT Event Locations-DDT

4. **<u>Question:</u>** How do we update the contact sale opportunity data to the individual contact record and not perform this one contact at a time since the client is inviting several hundred prospects to each event?

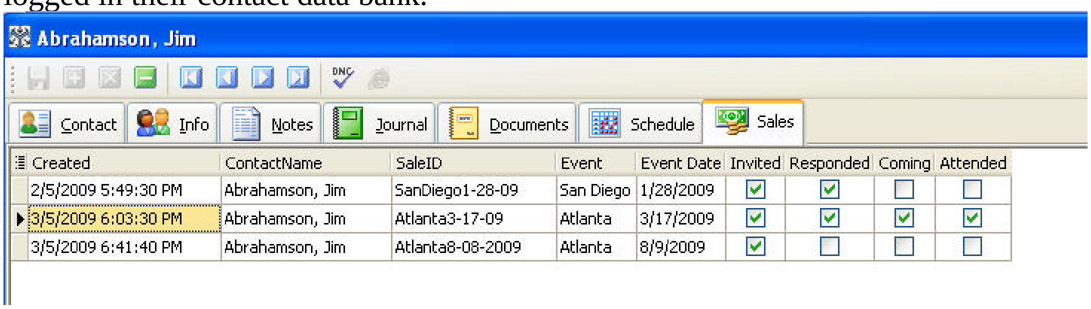
   This process is simple since we already have two key elements of contact data: (Lead source and Lead Date). The client has the prior excel spreadsheets that they used to input their original data or they have an excel spreadsheet for prospects they wish to add to their database since they will be inviting them to the specific conference in their part of the country. We will use these original excel spreadsheets to import specific data back into the contact sales records.

5. Now is the time to import the events data from Excel into WorkCenterU (see "Importing external data into WorkCenterU is using "Excel" in the main user manual. When you import external data into WorkCenterU using Excel and the fields you wish to populate are YesNO or True or False, you need do type "True" or "False" in the excel data. We plan on only typing "true" in the column for those contacts that need to be identified as a "yes". If the box is not checked, we automatically assume the answer is 'no'. That will automatically check the box for true or leave the box unchecked if false.
   a. We will use the "FileAs" contact record as the "key field" when importing this data. That will identify the contact record allowing us to add "sale or opportunity" items to the sales data table and associate these sale opportunities to the contact record.
   b. We will also map the following fields in Excel:



	A	O	P	Q	R	S	T	U
1	File As	SaleID	Event	Date	Invite	Respond	Coming	Attended
2	Abrahamson, Jim	Atlanta8-08-2009	Atlanta	08/09/09	TRUE			
3	Abrams, Daniel	Atlanta8-08-2009	Atlanta	08/09/09	TRUE			
4	Alderman, James	Atlanta8-08-2009	Atlanta	08/09/09	TRUE	TRUE		
5	Anderson, Peter	Atlanta8-08-2009	Atlanta	08/09/09	TRUE	TRUE		

   c. For each of the conferences, we will include this appropriate data in an Excel sheet. When multiple events (sales or opportunities) occur, we will be able to see each one in the contact record under the sales tab.
6. Here is a screen view of a specific contact record that now has multiple sale or opportunity events logged in their contact data bank.

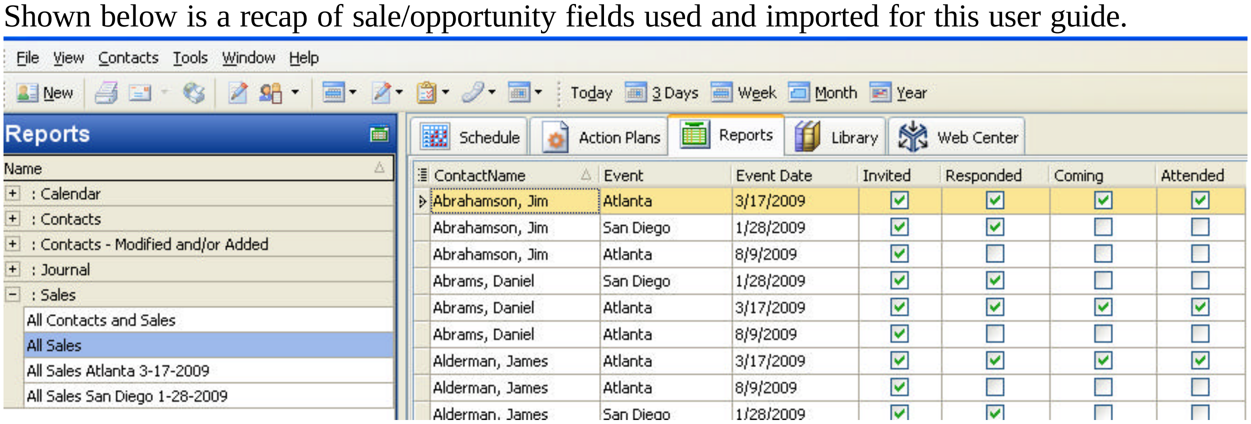


Created	ContactName	SaleID	Event	Event Date	Invited	Responded	Coming	Attended
2/5/2009 5:49:30 PM	Abrahamson, Jim	SanDiego1-28-09	San Diego	1/28/2009	☑	☑	☐	☐
3/5/2009 6:03:30 PM	Abrahamson, Jim	Atlanta3-17-09	Atlanta	3/17/2009	☑	☑	☑	☑
3/5/2009 6:41:40 PM	Abrahamson, Jim	Atlanta8-08-2009	Atlanta	8/9/2009	☑	☐	☐	☐

<u>Please note that by using the "SaleID" field and the contact FileAs, we have now logged each event under the appropriate contact record for identification and tracking.</u>

<u>Viewing your Sale/Opportunity Information – Using a Sales Report:</u>

Shown below is a recap of sale/opportunity fields used and imported for this user guide.



ContactName	Event	Event Date	Invited	Responded	Coming	Attended
Abrahamson, Jim	Atlanta	3/17/2009	☑	☑	☑	☑
Abrahamson, Jim	San Diego	1/28/2009	☑	☑	☐	☐
Abrahamson, Jim	Atlanta	8/9/2009	☑	☐	☐	☐
Abrams, Daniel	San Diego	1/28/2009	☑	☑	☐	☐
Abrams, Daniel	Atlanta	3/17/2009	☑	☑	☑	☑
Abrams, Daniel	Atlanta	8/9/2009	☑	☐	☐	☐
Alderman, James	Atlanta	3/17/2009	☑	☑	☑	☑
Alderman, James	Atlanta	8/9/2009	☑	☐	☐	☐
Alderman, James	San Diego	1/28/2009	☑	☑	☐	☐

Once the information is imported, you can open your contact record(s), click on the "Sale" tab and see the information added for the contact record.

For more information on using the WorkCenterU software to its fullest potential, please review the other user manuals, guides, and or subscribe to one of our live coaching and training webinars. For those individuals that do not have the time to program their software and design the database to meet their needs, personal coaching and design time can be acquired through our company.