



Intro

Vertica CRM is redefining the entire concept of Brokerage technology, forever changing the way the industry has been working for the past 60 years.

The goal in creating this software was in essence to create a whole new platform for business brokers... One that took the very best of all combined features that any business broker would need and make it even more customizable and powerful for the individual

user. Specifically, the intent was to allow anyone functioning as an intermediary, to work through their business process that typically would require multiple programs and efficiently perform all functions inside of one program BBCRM.

This system is the only fully integrated front end / back end one stop shop for all business brokerage software needs. We provide all of the features that you can possibly need to be super-efficient with your business.

We are always actively listening to our customers so that we can use your feedback and suggestions to make your experience even better.

Our bottom line is “Striving to give you the tools to put more money in your pocket!”

With our ever growing customer base, the growing BBCRM marketplace will continue to expand and with improvements and powerful features constantly added. This is the premier platform for all business brokers and M&A firms internationally.

The system can be configured on a granular level to your company's unique business methodology. The way you run your business, is the way we can set the system up to operate! In addition to this, the system was built and designed for business brokers. We know that business brokers don't usually care about tools and technology, the bottom line is you care about earning more commissions, being more efficient and saving time. In addition to the system being configured on a global level, the system can be designed to be configured for each individual user profile. For example, we understand not all business brokers are the most technically adapt, you may be on a team with people who are more tech savvy than you. Our system was built for the median broker. We can configure each individual user to fit their needs based on their preferences.

User Manual Chapters

This is an outline of what will be covered in this user manual.

1. Modules
2. Dashboard
3. Contacts
4. Accounts
5. Leads
6. Listings
7. Opportunities
8. Marketing Tools
9. Sending Quotes
10. Products
11. Documents
12. Media
13. Analytics and Reports
14. Charts
15. Calendar
16. Topics
17. Actions
18. Admin Tools
19. System Settings
20. Email Configuration
21. Web Lead Captures and Routing
22. Customization Tools
23. Data Import and Export
24. User Menu
25. Groups
26. Vertica Support
27. Activity Feeds
28. Process Tools
29. Workflows and Process Tools
30. Work flows
31. Workflow Manual
32. Front End

Vertica CRM Modules

The modules are the core unit for Vertica CRM and how data is presented to users with organizing functionalities such as, the marketing features, contacts, actions and more. Each module is displayed in the middle of the screen. This appears with the same static left and right columns as in the dashboard which we will cover. A module view works the same no matter what module the user chooses.

Module Grid View

When you open up your dashboard, all modules are displayed in the top bar. By clicking on a module such as marketing, accounts, listings etc, All of your records will typically be listed in a grid view. There are several ways to organize your data:

How To Organize Your Columns

❑ Sorting By Column -

To sort by column, simply **click** on the name of the column and it will sort in ascending order. **Double click** and it will sort by descending order.

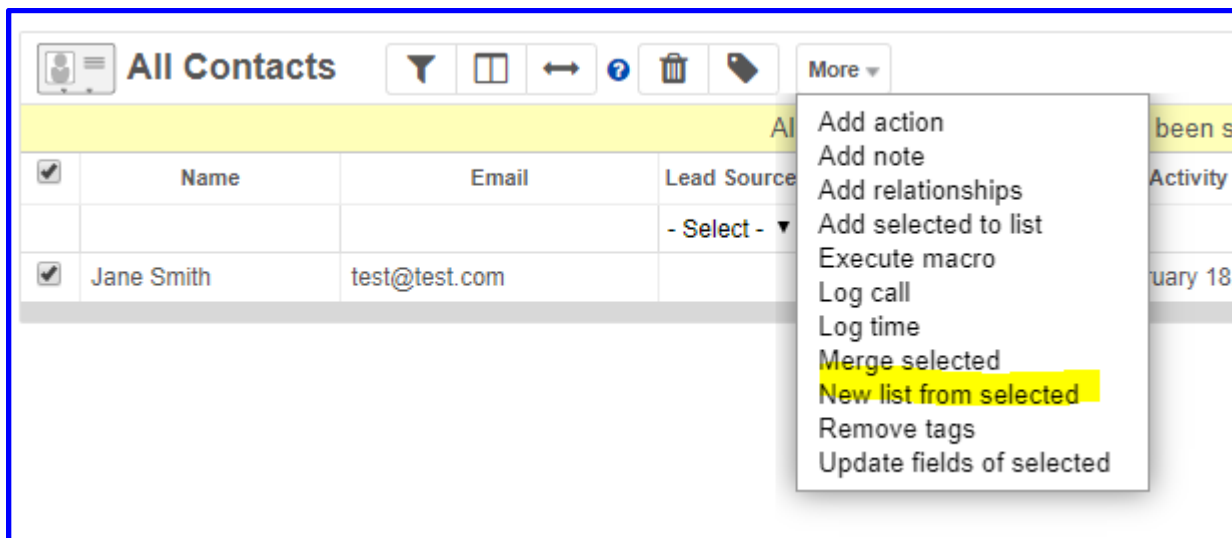
ID	Buyer Status	Name	Email	Phone	Tools	Broker	State	Pass/Post/let	C/New	Amount o
203	Registered	Ruxandra Pietreanu	ruxandra.pietreanu@path-finder	(303) 960-5891	QZ	Joshua Factor	New York	123-1122	No	0

ID	Buyer Status	Name	Email	Phone	Tools	Broker	State	Pass/Post/let	C/New	Amount o
203	Registered	Ruxandra Pietreanu	ruxandra.pietreanu@path-finder	(303) 960-5891	QZ	Joshua Factor	New York	123-1122	No	0
200	Registered	Dan Wilson	dwilson@vikingmergers.com	(303) 960-5891	QZ	Joshua Factor	Wellington	123-1122	No	0
202	Registered	Marion Vankekenetk	info@marionvankekenetk.com	09920360429	QZ	Joshua Factor	British Colum	123-1122	No	0
201	Registered	Antony Landsman	ylandsman@gmail.com	123 456 7890	QZ	Joshua Factor	NY	123-1122	No	0
199	Unregistered	Boris Rykov	boris@business-sale.com	(303) 960-5891	QZ	Joshua Factor	Alberta	123-1122	No	0
198	Registered	Paul Weiner	pweiner@apitobow.com	(303) 960-5891	QZ	Joshua Factor	Wellington	123-1122	No	0
197	Registered	Paul Niccum	pniccum@paradisecapital.biz	(303) 960-5891	QZ	Joshua Factor	New York	123-1122	No	0
196	Registered	Sean Litman	sean@gosimcha.com	(303) 960-5891	QZ	Joshua Factor	Alberfa	123-1122	No	0
195	Registered	Matt Coletta		(207) 774-7711	QZ	Joshua Factor	ME	123-0411	No	0
194	Registered	Keith Lehmann	keith@abcbrokerage.com	(303) 960-5891	QZ	Joshua Factor	FL	123-3221	No	0
192	Registered	Tony Vaughan	tony@vexus.co.uk	(214) 751-3900	QZ	Joshua Factor	TX	123-7521	No	0
97	Registered	Joshua Factor	josh@verticacm.com	(212) 901-5191	QZ	Joshua Factor	New York	111-9901	No	0
191	Registered	Ish Uttam	ish@sunbelteedmonton.com	(207) 774-7711	QZ	Joshua Factor	ME	123-0411	No	0
190	Registered	Mike Lohbeck	mike@mgibusinesssolutions.co	09920360429	QZ	Joshua Factor	OH	123-1122	No	0
189	Registered	Ron Stewart	ron.stewart.nz@gmail.com	(352) 445-4871	QZ	Joshua Factor	FL	123-3444	No	0
188	Registered	Cameron Prosser	cameron.prosser@brokers.com	(214) 369-1431	QZ	Joshua Factor	MO	123-6311	No	0
187	Registered	Raj Pankh	raj@aventures.com	(612) 275-1391	QZ	Joshua Factor	MIN	123-5544	No	0
186	Registered	Mike Metzger	m.metzger@murphybusiness.co	(508) 880-7101	QZ	Joshua Factor	AL	123-3566	No	0
185	Registered	Tommy West	tommy@sagewoodta.com	(510) 500-7971	QZ	Joshua Factor	CA	123-9444	No	0
184	Registered	Shuart Cufier	scufier@sunbelnetwork.com	(978) 618-1991	QZ	Joshua Factor	MA	123-0188	No	0
183	Registered	Sam Eaton	sam@awcz.com	(757) 292-9931	QZ	Joshua Factor	VA	123-2341	No	0
181	Unregistered	Sherif Doctor	sherif@aps.net	(888) 783-7821	QZ	Joshua Factor	CA	9566	No	0



- ❑ **More Options-** if you select one or more contacts in the main bar, you will see three buttons that will come. Delete, Add Tags and a More Button. The **more** button is a drop down menu with multiple options.
- **Delete-** remove contact
- **Tags-** tag a record and integrate tags into the workflow. I.E if you tag a buyer with a “restaurant” tag, they will automatically be added to the “restaurant” dynamic campaign workflow.
- **More-** some are add action, add note, add relationship, log call, log time are all things that can be done on an individual contact record basis. Here you can do it in mass. You can also merge selected records, remove tags and you can also create a new static list of the buyers you checked off.

I.E you do a search for all buyers in Michigan who are interested in purchasing a manufacturing plant with net cash flow of over 500K. You will filter out the buyers based on the columns of information in your search tool, pressing the check box once you do that, you can click on new list from selected so you can create a new list.



Choose a new list from selected, you then have the option to name a list, name your list. Hit the create button. Then go to the marketing module, choose contact campaign from the actions toolbox which is located on the upper left hand corner on every page. Choose contacts list. If you go into that module you will see the test list and all contacts associated with that list. For

Create new list from selected ✕

What should the list be named?

For information for creating lists see chapter that discusses marketing module.

Contact Lists				
Name	Type	Owner	Members	Tools
All Contacts	Dynamic	Anyone	1	Q
My Contacts	Dynamic	Vertica CRM	1	Q
New Contacts	Dynamic	Vertica CRM	1	Q
Test List	Static	Vertica CRM	1	Q

For more information on creating marketing lists both static and dynamic, see chapter that discusses marketing modules..

All Contacts
More ▾

<input checked="" type="checkbox"/>	Name	Email	Lead Source
<input checked="" type="checkbox"/>	Jane Smith	test@test.com	- Select - ▾

- Add action
- Add note
- Add relationships
- Add selected to list
- Execute macro
- Log call
- Log time
- Merge selected
- New list from selected
- Remove tags
- Update fields of selected**

If you want to change the “**Buyer Status**” field of all the selected buyers select that from the drop down menu and then choose the option from the selected. You change them from different status right here.

Update fields of selected [X]

Select a field and enter a field value

Buyer Status ▼

Select an option ▼

Update Cancel

- ❑ **Filter a Column** - To filter a column, go to the blank cell between the name of the column and the data. You can filter the contents of that column by entering what you want to find. For example, you know a contact's first name is Sean but that is all you know. **TYPE "SEAN"** in the blank cell below name and click **ENTER**. The system will show any entry that includes "Sean" somewhere in the name column. From there you can narrow the search with more specific data.

- ❑ **Mass Insertions or Deletions** - With this, you are able to perform actions against multiple records at a time. To choose the records you want to effect, click on the box at the far left for each record,
 To choose the entire page of records click on the box at the very top of the column. You will see a message appear at the top asking if you want to select the records on all pages "**CLICK HERE**" and all the boxes will be chosen.
 Once a record has been chosen, a **MORE** button appears in the Title Row. You can perform one of these actions to the entries that have been chosen:
 - ❑ Add an action
 - ❑ Add a note
 - ❑ Add relationships
 - ❑ Add a selected item to list **(this must be a Static list)**
 - ❑ Execute a macro
 - ❑ Log calls
 - ❑ Log time
 - ❑ Merge selected
 - ❑ New list from selected **(This will create a Static list)**
 - ❑ Remove Tags
 - ❑ Update fields of selected

This can also be used to delete multiple records at a time by simply clicking on the “**Trash Can**” icon.

-To create Custom modules go to the admin tab and use the Vertica Customization Tools.

Understanding Your Dashboard

The Vertica CRM dashboard is the homepage and gateway to everything our system offers. With it, you can instantly see the latest leads, notifications, reminders, calendar events, user location check-ins and so much more.

Like many features within the Vertica CRM, the dashboard is fully customizable to fit your needs. It can easily be changed or reorganized to best fit your business methodology. We created our system to help you close more deals. We know business brokers are not all super tech savvy and just want to focus on what is important. Our system is built to save you time.

Going into the dashboard, we can configure it for each individual team member not just company wide.

From here, you can access all the modules within Vertica CRM. The top blue menu bar (highlighted in orange below) gives access to all the different modules. The Dashboard also

contains widgets that help you perform different tasks such as a calendar widget, notepad, doc viewer and more.

Dashboard Contents

- Dashboard Record Detail View - Orange
- Dashboard Left Column - Red
- Dashboard Right Column - Green
- Dashboard Middle Column - Blue

The screenshot shows a CRM dashboard with the following components:

- Navigation Bar:** Leads, Buyers, Data Room, Sellers, Listings, Deals, Brokers, Marketing, Email, Docs, Actions, Calendar, Reports, Process, Quotes, Admin, Profile, Users. Search for contact, action, deal... 203
- Left Column (Red border):** Profile (Joshua Factor), Show Widget, Create Widget, Edit Layout, Filter Controls (Simple, Full), Event Types, All, Actions Completed, Action Reminders, Calendar Events, Doc Updates, Email Received, Emails Opened, Emails Sent, Social Posts, Records Created, Records Deleted, Topic Replies, Process Complete, Process Reverted, Process Started, Favorites, Recent Items (Barry Schechter NDA Agreement for business Busy Bike).
- Middle Column (Blue border):**
 - Actions Summary:** Table with columns: Action Description, Assigned To, Completed By, Create Date, Due Date, Last Updated. Rows include "Buyer Added listing" and "follow up with buyer".
 - Activity Feed:** "Reminder! The following action is due now: follow up with buyer 7 hours ago". "Thursday, January 16, 2020". "A new action associated with the contact Thad Eldredge has been assigned to Joshua Factor, 4 days ago". "Joshua Factor posted a comment on Thad Eldredge: test 4 days ago".
 - New Web Leads:** Table with columns: Name, Email, Lead Source. Rows include Barry Schechter, Jane Smith, Thad Eldredge, Eric Seifert, Joshua Carnes, Akiva Ranells, Jose Torres, Rabidall Wiggins, Simon Harrison, XY.
 - Events Line Chart:** Line chart showing activity from Jan 1 to Jan 19. Legend includes All Events, Notifications, Field Events, Comments, Records Created, Records Deleted, Webleads Created, Process Started, Process Complete, Process Reverted, Emails Sent, Emails Opened, Web Activity, Cases Escalated, Calendar Events, Action Reminders, Actions Completed, Doc Updates, Email Received, VOIP Calls, Media.
 - Buyers Summary:** Table with columns: Name, Email, Phone. Row: Barry Schechter, bschecht@uno.com, (214) 385-7756.
- Right Column (Green border):** Active Users (Joshua Factor), Clock, Tag Cloud (Just Me | All Users), Quick Contact (Email, First Name, Last Name, Phone, Create), Calendar (Month, Day, Sun-Sat grid).

Above is an image of our dashboard. We have customized it to fit our user flow. You can customize your dashboard as you see fit.

The Top Bar (orange) starting from the far left consists of:

- **Your Custom Logo** - in the upper left corner
 - **Module Names** - These are the links to different modules. When you hover over a module, a drop down will be displayed with actions within for you to choose.
 - **More Button** - This provides access to additional modules
 - **Admin** - This provides access to all admin tools (if user has access)
 - **Profile** - This shows the current user information. This will be explained further in the User Menu Items section.
 - **Users** -Displays which of your users are currently logged into the system
 - **Search Box** - Allows user to type in whatever they want to search for anywhere in the system.
 - **Box With Blue Number** -This displays the total number of notifications your user has. Clicking on the number will provide a drop down box with all the notifications.
 - **Box With Right Pointing Arrow** -This will toggle the widget section (Green) in the dashboard. This window displays all the widgets that are available to the user.
 - **Box With Gear Symbol** - Clicking this box will show a drop down of additional widgets available for display in right hand column or where ever you'd like to display the widgets.
 - **Profile** - Clicking this will open a drop down menu of items pertaining to the user. This will be discussed in the User Menu Items section.
-

Dashboard Left Column

The left column of your dashboard remains static in place. It contains multiple functions :

- **The Profile** - This shows current user's name and by clicking on the name, this will take you to the users profile information page. This acts the same way as the "Profile" button on the right of the Top Bar.
- **Widget Controls** - Toggles a slider bar at the top of the middle columns that allows you to adjust the width of the dashboard columns
 - **Show Widget** - This provides a drop down menu with available widgets that can be displayed in the middle two columns or however you configure. Choosing a widget will create a new window at the bottom of the right-middle column with this widget information.
 - **Create Widget** - A pop-up menu appears with a drop down menu of available types for a new widget. If you choose one and click "**Create**" a new widget will be created at the bottom of the right-middle column with the widget's information displayed.
 - **Edit layout** -
- Filter Controls - With filter controls, this allows you to set filters on activity feed.
- There are two views. The "**Simple**" view filters the activity feed based on event type (See Image) The "**Full**" view lets you choose exactly what to display based on the four filtering criteria. You can view image examples below. Simple highlighted in yellow, full in red.
 1. **Visibility** - Public or private
 2. **Relevant Users** - Displaying events relating to specific users.
 3. **Event Types** - Choose which event types to display.
 4. **Social Subtypes** - Choose which social subtypes to display.

- Once these filters are chosen you can set as defaults or uncheck filters, apply filters and create reports based on them.



Dashboard Right Column


The Dashboard right most column is reserved for all utility widgets. This Column may be hid from view by clicking on the icon in the top bar (Orange) which is a box with a right facing arrow inside. Clicking again will toggle it back open. We have configured our example dashboard to fit personal workflow preferences. These utility widgets consist of the following tools:

- **Clock** - shows your current time
- **Calendar** - This shows a calendar and if the user has any activities scheduled a colored dot will be displayed on the day and you can click on that day to see the details.
- **Notepad**- space to make any notes
- **Quick Contact**- this allows for users to quickly add a contact to the system. Email, first name, last name and phone may be entered. This creates a **Contact Record**.
- **Files**- This area allows you to upload external files into the system and have them available in this view.
- **Message Board**- A message may be entered that is shared with others that are logged in to the system.
- **Doc Viewer** - This feature allows the user to choose a file that the contents of which will be displayed in the window.
- **Active Users** - Shows which of your users are logged on to the system
- **Top Sites** - With this, users can add links to favorite websites here. This makes them ready and available to click on and open a new window with the site.
- **Tag Cloud** - This holds tags that may be added to a record.
- **Executive Workflow** - This feature allows the user to trigger a workflow from within any record. If any module has workflows associated with that specific module, the **Execute Workflow Widget** will be displayed in the right most column. Choose which workflow and click on **Execute** and the workflow will operate.

Here is a sample of the right column for reference:

Joshua Factor

Clock



Tag Cloud

[Just Me](#) | [All Users](#)

#143 #c store #bba #test 2

Calendar

Month Day < >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
5	6	7	8 ● ●	9	10 ●	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

My Actions

348 Total Tasks
226 Incomplete Tasks
101 Overdue Tasks
46 Completed Tasks

Message Board

Please enter a message of the day!
[Edit Message](#)

Dashboard Middle Two Columns

Actions Summary

Assigned To	Task Description	Due Date
Joshua Factor	You have a new buyer Ruxandra Pietreanu. You have two days to make initial	January 10, 20
Joshua Factor	reminder to call buyer X	January 8, 20
Joshua Factor	You have a new buyer Antony Landsman. You have two days to make initial	December 24
Joshua Factor	You have a new buyer Marion Vankekenrietkerk. You have two days to make	January 2, 20
Joshua Factor	You have a new buyer Dan Wilson. You have two days to make initial contac	December 21
Joshua Factor	You have a new buyer Boris Rykov. You have two days to make initial contac	December 21
Joshua Factor	You have a new buyer Paul Weiner. You have two days to make initial contac	December 21
Joshua Factor	You have a new buyer Paul Niccum. You have two days to make initial contac	December 16
Joshua Factor	You have a new buyer Sean Littman. You have two days to make initial cont	December 14
Joshua Factor	You have a new buyer Matt Coletta. You have two days to make initial contac	December 11

<< < 1 2 3 4 5 6 7 8 9 10 > >>

New Web Leads

Name	Email	Lead Source
Ruxandra Pietreanu	ruxandra.pietreanu@path-fin	
Marion Vankekenrietkerk	info@marionvankeken.com	
Antony Landsman	ylandsman@gmail.com	
Dan Wilson	dwilson@wikingmergers.com	
Boris Rykov	boris@business-sale.com	
Paul Weiner	pweiner@capitolbbw.com	
Paul Niccum	pniccum@paradisecapital.bi	
Sean Littman	sean@gosimcha.com	
Matt Coletta		
Keith Lehmann	keith@abcbrokerage.com	

<< < 1 2 3 4 5 6 7 8 9 10 > >>

Activity Feed

- Wednesday, January 15, 2020 -

- You started the process stage "Closing" for the buyer Dan Wilson
5 days ago
- You completed the process stage "Contract" for the buyer Dan Wilson
5 days ago
- You started the process stage "Contract" for the buyer Dan Wilson
5 days ago
- You completed the process stage "Due Dilligence" for the buyer Dan Wilson
5 days ago

- Tuesday, January 14, 2020 -

- You started the process stage "Contract" for the buyer Antony Landsman
6 days ago

Events

Line Chart

- All Events
- Notifications
- Feed Events
- Comments
- Records Created
- Records Deleted
- Webleads Created
- Process Started
- Process Complete
- Process Reverted
- Emails Sent
- Emails Opened
- Web Activity
- Cases Escalated
- Calendar Events
- Task Reminders
- Tasks Completed
- Doc Updates
- Email Received
- VOIP Calls
- Media

Buyers Summary

Name	Email	Phone
Ruxandra Pietreanu	ruxandra.pietreanu@path-fin	(303) 960-5890
Dan Wilson	dwilson@wikingmergers.com	(303) 960-5890
Marion Vankekenrietkerk	info@marionvankeken.com	09920360429

Above you will find the Dashboard. This shows four data view widgets :

New Web Leads, Activity Feed, Lead Volume and Accounts Summary.

These can be moved around by simply dragging and dropping into their new location. To create a new widget, click on the **“create widget”** option in the upper part of the left column.

You can choose the widget type you want and click **“Create”**. The system will display this new widget at the columns. You can also edit the widget by clicking on its gear icon and checking the box by each field you want to see. You can sort each field in the ascending/descending order by clicking on the name field. The blank cell below the field name can be used to filter each search with the data in the column.

Contacts

The contacts are the core of your Vertica CRM. The initial view of the CONTACTS module is organized in a grid view. With Vertica CRM, you can search through contacts based on matching criteria, organize lists of contacts with attribute filters, view contact location heat maps, and so much more. In this section we will cover everything you need to know about contacts and the Data Room.

*Pro Tips

1. The **Grid View** provides easy access to your data in a specific module. See example below. Notice the user may choose what columns of data to display. You may drag and drop in order desired. Changes made to the order of columns or what columns to display will stay in the new form until you change them again.
 2. The blank line under column names is the **FILTER** line. Each column can be filtered by the data entered. You may enter data into more than one column to create a more specific filter.
-

Contacts Contents

- **Contact Grid View**
 - **Contact Record Detail**
 - **Contact Lists**
 - **Importing and Exporting Your Contacts**
 - **Create Contacts**
 - **Contact Processes**
-

Contact Grid View

When Clicking on a module, such as contacts, accounts or marketing, all of your records will typically be listed in a grid view. There are several ways to organize the data:

- **To sort a column** - Click on the name of the column and it will sort in ascending order. Click it again and you can sort by descending order.
- **Filter a column** - In the blank cell between the name of the column and the data you can filter the contents of that column by entering what you want to find. For example, you know the contacts first name is **SEAN** but that is all you know. Type SEAN in the blank cell below **NAME** and click **ENTER**. The system will show any entry that includes “SEAN” somewhere in the name. You can narrow the search with specific data.



The screenshot shows a web interface for 'All Buyers'. A search filter 'sean' is applied to the 'Name' column. The table displays one result: Sean Littman, with contact information including email, phone, and broker details.

ID	Buyer Status	Name	Email	Phone	Tools	Broker	State	Pass	Post	Net C	New	Amount	Business Category	City
196	Registered	Sean Littman	sean@gosimcha.com	(303) 960-5891	QR	Joshua Factor	Alberta	1234	1123	No	0		Select options	

The above image shows what it will look like when you search for a specific name.

Now, the left hand column displays what actions the user may perform on any specific screen. In the **Grid View** the user can click and create a contact list, create a contact, import or export contacts, view the contact map, save maps and so on.

Next the title you will see this handy graphic :



There are three grid view option buttons located at the top of your grid!

- The first (the funnel) allows you to **clear filters**. This will remove any of the filter settings you have inputted into the data fields. I.E name search, status etc.
- The second is the **columns button** (the middle button) this is pretty straight forward, allowing you to add/remove columns from your contact list grid view.
- The third of these magical buttons is the **auto-resize columns** function. What is that you may ask? This is a tool that will change the width of the columns of your grid view to an

automatically determined appropriate size, based on length of the data in the field as well as the size of your browser window.

All 100 contacts on this page have been selected. [Click here](#) to select all contacts on all pages.

ID	Buyer Status	Name	Email	Phone	Tools	Broker	State	Pass	Posta	Net C	New I	Amount o	
203	Registered	Ruxandra Pietreanu	ruxandra.pietreanu@path-finder.r	(303) 960-589	Q	Joshua Factor	New York	123	1122	No	0		Select opt
200	Registered	Dan Wilson	dwilson@vikingmergers.com	(303) 960-589	Q	Joshua Factor	Wellington	123	1122	No	0		
202	Registered	Marion Vankekenrietki	info@marionvankeken.com	09920360429	Q	Joshua Factor	British Colom	123	1122	No	0		
201	Registered	Antony Landsman	ylandsman@gmail.com	123 456 7890	Q	Joshua Factor	NY	dytg	123	No	0		
199	Unregistered	Boris Rykov	boris@business-sale.com	(303) 960-589	Q	Joshua Factor	Alberta	123	1122	No	0		
198	Registered	Paul Weiner	pweiner@capitolbbw.com	(303) 960-589	Q	Joshua Factor	Wellington	123	1122	No	0		
197	Registered	Paul Niccum	pniccum@paradisecapital.biz	(303) 960-589	Q	Joshua Factor	New York	123	1122	No	0		Transporta
196	Registered	Sean Littman	sean@gosimcha.com	(303) 960-589	Q	Joshua Factor	Alberta	123	1122	No	0		
195	Registered	Matt Coletta		(207) 774-771	Q	Joshua Factor	ME	123	0410	No	0		
194	Registered	Keith Lehmann	keith@abcbrokerage.com	(303) 960-589	Q	Joshua Factor	FL	123	322	No	0		
192	Registered	Tony Vaughan	tony@vexus.co.uk	(214) 751-390	Q	Joshua Factor	TX	123	752	No	0		

140 contacts have been selected (140 in total). [Click here](#) to clear your selection.

ID	Buyer Status	Name	Email	Phone	Tools	Broker	State	Pass	Posta	Net C	New I	Amount o	
203	Registered	Ruxandra Pietreanu	ruxandra.p	0-589	Q	Joshua Factor	New York	123	1122	No	0		
200	Registered	Dan Wilson	dwilson@	0-589	Q	Joshua Factor	Wellington	123	1122	No	0		
202	Registered	Marion Vankekenrietki	info@mar	0429	Q	Joshua Factor	British Colom	123	1122	No	0		
201	Registered	Antony Landsman	ylandsma	7890	Q	Joshua Factor	NY	dytg	123	No	0		
199	Unregistered	Boris Rykov	boris@bus	0-589	Q	Joshua Factor	Alberta	123	1122	No	0		
198	Registered	Paul Weiner	pweiner@capitolbbw.com	(303) 960-589	Q	Joshua Factor	Wellington	123	1122	No	0		
197	Registered	Paul Niccum	pniccum@paradisecapital.biz	(303) 960-589	Q	Joshua Factor	New York	123	1122	No	0		Transpo
196	Registered	Sean Littman	sean@gosimcha.com	(303) 960-589	Q	Joshua Factor	Alberta	123	1122	No	0		
195	Registered	Matt Coletta		(207) 774-771	Q	Joshua Factor	ME	123	0410	No	0		
194	Registered	Keith Lehmann	keith@abcbrokerage.com	(303) 960-589	Q	Joshua Factor	FL	123	322	No	0		

- Add action
- Add note
- Add relationships
- Add selected to list
- Execute macro
- Log call
- Log time
- Merge selected
- New list from selected
- Remove tags
- Update fields of selected

Mass Insertions or Deletions - With this, you can perform actions against multiple records at a time. To choose the records you wish to effect, click on the box at the far left for each record. See above. To choose the entire page of records, click on the box at the very top of the column. A message will appear at the top asking if you want to select the records on all pages, “Click Here” and all boxes will be chosen.

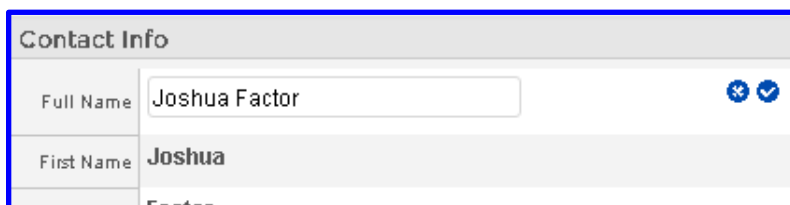
Once any record is chosen, the bar will turn from yellow to green. A “**More**” button appears in the title row. You can perform one of these actions to the entries that have been chosen:



- Add Action
 - Add Note
 - Add Relationships
 - Add Selected to list (this must be static)
 - Execute Macro
 - Log Call
 - Log Time
 - Merge Selected
 - New List from selected (this creates static list)
 - Remove Tags
 - Update fields of selected
 - This can also be used to delete multiple records at a time by clicking your “Trash” icon.
-

Contact Record Detail View

Click on a contacts name from any screen in your Vertica CRM to view the details.

Edit Contact allows you to update contact information. You can also edit a single field by clicking on the Edit Field box.

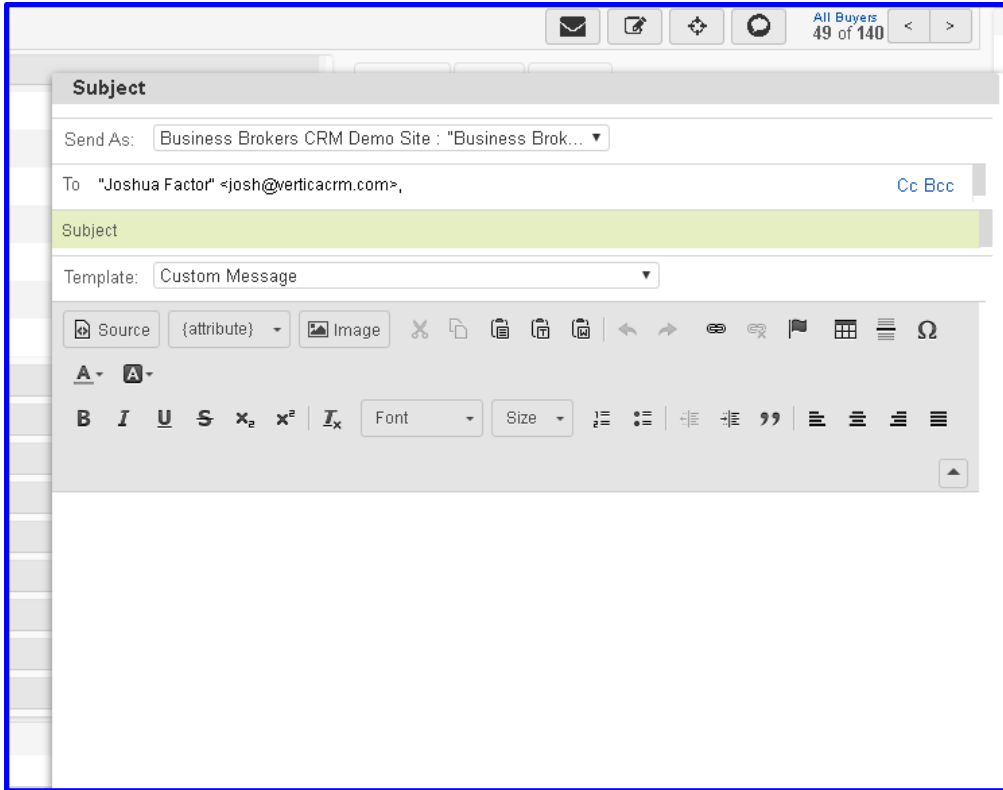


Contact Info	
Full Name	Joshua Factor  
First Name	Joshua

You will find this at the far right of each field. You can also **SHARE CONTACT** to draft an email with the contact’s record details in the body.

Delete Contact erases the contact record from your database. Please note, this cannot be undone!

- **Send Email** - This will draft an email addressed to the contact. You can also use the mail icon along the top menu bar. Both of these options bring up an email draft field within the record page. **See below:** This is what will appear when you click the email icon.

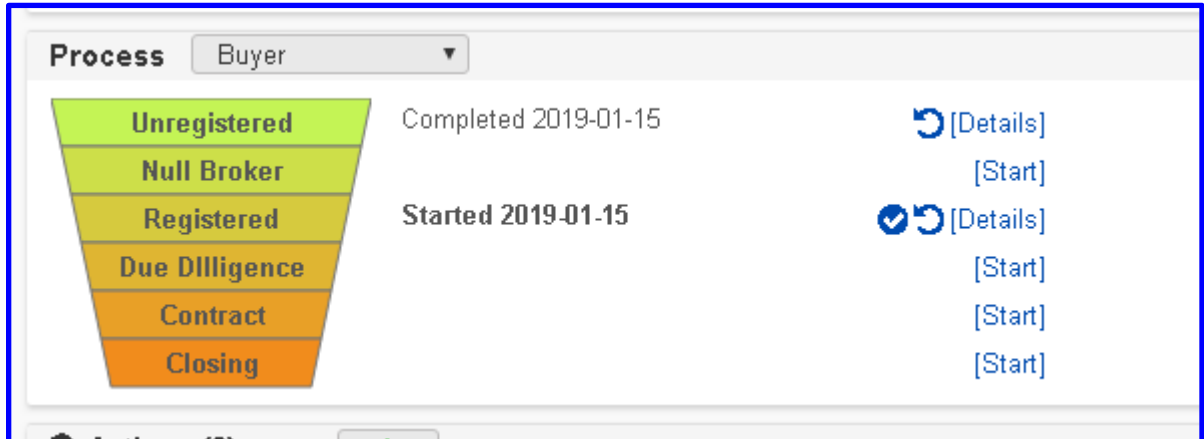


- There are many additional tools you can use under the left hand actions column. **Attaching a file/photo** allows you to upload media associated with the contact. Please note that there is also an image gallery widget, where you can upload and see a thumbnail of your images.

Quotes and Invoices initiates a new quote for the buyer. You can add line items and make the pricing adjustments all from one screen. This can also be used to associate what specific deals you are working on with that buyer without sending them a quote.

Subscribe will send an automated email update to you whenever the buyers record has been updated! Pretty cool right!

- You can quickly view the buyers current process stages. See below.
You can also view a complete overview of the interactions with the record in the graph form in **ACTION HISTORY CHART**



- View and edit a buyer's tags. Drag and drop from the "Tag Widget". By double clicking within the tag field, this instantly creates a new tag. You can view and delete your existing tags within the tag manager.



- Set the buyers deal confidence. This is a five point scale of your confidence in the sales opportunity associated with the contact. This scale is also important for your sales pipeline chart. The five points are
 1. Low
 2. Growing
 3. Forecast
 4. Committed
 5. In the Bag!

The Relationship Tool

Add relationships. This lets you see how your contacts are connected to one another. This tool enables you to create and see relationships between all connected parties. I.E if you have two partners with two contact records in the system, you can now see how they are connected. This can also create relationships between records.

I.E when an NDA has been signed online it will add it to the relationship tool and you can see all the things associated with it. This will all show all information that's been entered in the data room (see data room chapter) and everything else associated with it.

This tool gives you the ability to have all the relationships between the buyer/records all in one place. I.E If you have a partner you can manually create a relationship action to show how the two are connected.

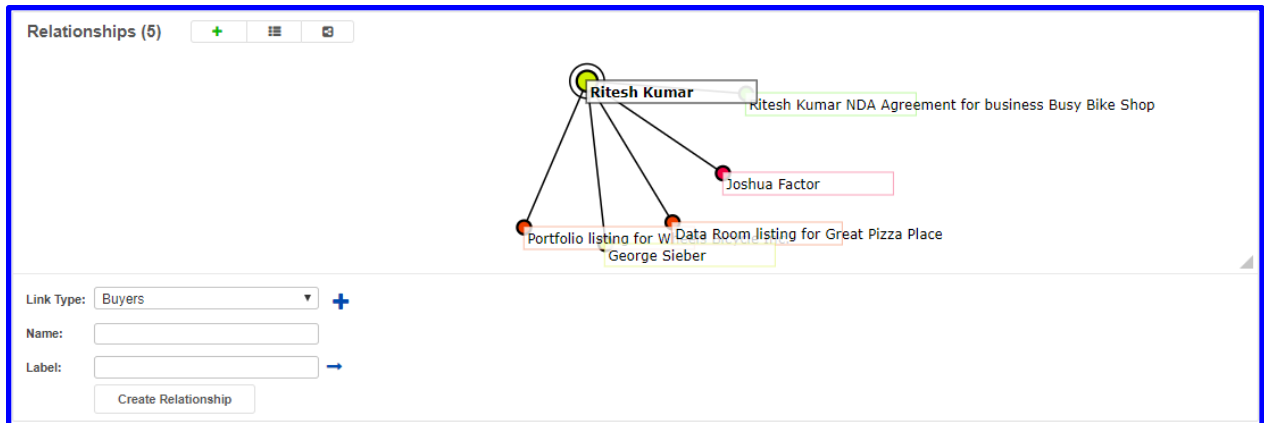
You can view it in the grid view like below or you can see it as an in-line graph. The way you get to the view is by clicking on the button that is a green + . From the controls you can you look up the type of relationship or create a new from the various module types in the system. Once you do that, the CRM will be able to put them in the right places.

The next button is the **in-line graph** button. This takes all that information and puts it in a nice graph as shown below.

The third option is for **full graph**. This opens up the full graph mode and shows you the entire database of your company. In this mode you can manipulate it to do what you want and it even jiggles!



Connection map view. the system will map out the contacts and show you correlations between them.



The Notes Tool

- The widget displayed is called the publisher. This will allow you to create, complete and view a history of actions, appointments, calls, emails, web activity and more. To create a new event simply select one of the tabs and create your event, **See below:**

Comment
Action
Log Call

Log Time
Calendar Event

Due Date

Priority
Low ▼

Visibility
Public ▼

Reminder

Add to Calendar
None ▼

Assigned To

Anyone

Gary Brown

Joshua Factor

pbx user

+
🗨️

Save

All ▼
Toggle Text | Show All | Relationships

✉️

Email Message: January 6, 2020, 11:01:19 AM

Campaign: C Store Dan

[View email]

Sent by Anyone

✕

📁

December 16, 2019, 12:21:04 PM

Campaign: Manufacturing Plant

[View email]

Contact has opened the email.

✎ ✕

📁

December 16, 2019, 12:21:04 PM

Campaign: Manufacturing Plant

[View email]

Contact has opened the email.

✎ ✕

✉️

Email Message: December 16, 2019, 12:20:46 PM

Campaign: Manufacturing Plant

[View email]

Sent by Anyone

✕

📅

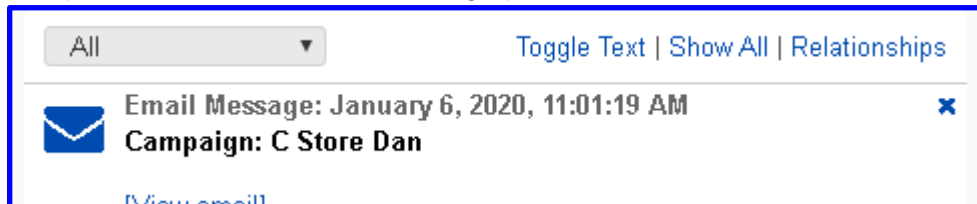
Event: November 22, 2019, 12:00:00 AM - November 22, 2019, 9:00:00 AM

[View email]

✎ ✕

- The notes tool will be your new best friend! Use it to easily log a call (or attempted call.) If you like, you can select a *quick note* to speed up your call log process. These are preset comments that you can append to your call log. You can of course modify the contents of the quick note dropdown menu with our super cool drop down editor!
- Aside from time spent on the phone, you can also simply **log time** spent working on a record, Whether it's the background research or case analysis, you will be able to log how much time you've spent working on the topics related to the buyer or contact and what time was spent doing. Great for accountability!

- Create a new **action** associated with the buyer or contact. Just as in the full action editor, you can set due dates, assign users, priority, visibility and description. Edit, complete, or even delete the action using the tools across from the date and time stamps.
- Add a public **comment** on the contact's record that you and other brokers can refer to when you next deal with this person.
- Create a new **calendar event** from the publisher. Designate an appointment time and date on your team calendar. You can set visibility (i.e who can see it on their own personal calendars) along with other assigned users. Set the priority and display different colors as well.
- The publisher has additional viewing options :



See above in blue:

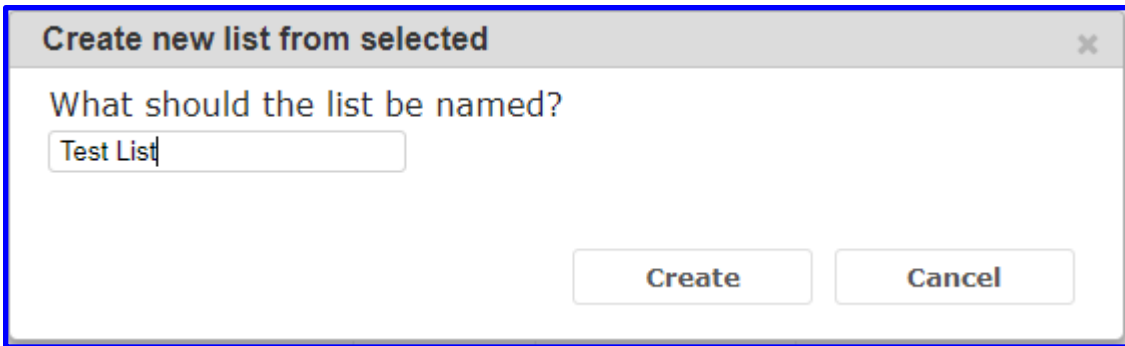
The **TOGGLE TEXT** option will minimize or maximize the detailed text for each record component. The **SHOW ALL** button will expand the entire action history chart to be displayed within one page. If you select **RELATIONSHIPS**, then the action history chart will display all actions for the record, as well as any other record with an established relationship. When you click on any of these options again, you will deselect them and return the action history chart to normal!

Contact Lists

You can create and use contact lists to send emails to existing clients, potential leads, business partners or any other sort of list you can think of they sky is the limit! You can create lists to be either dynamic or static. A dynamic list is automatically populated and updated based on a set of filter criteria. A Static list has manually stipulated set of members it can send to. This will not update automatically.

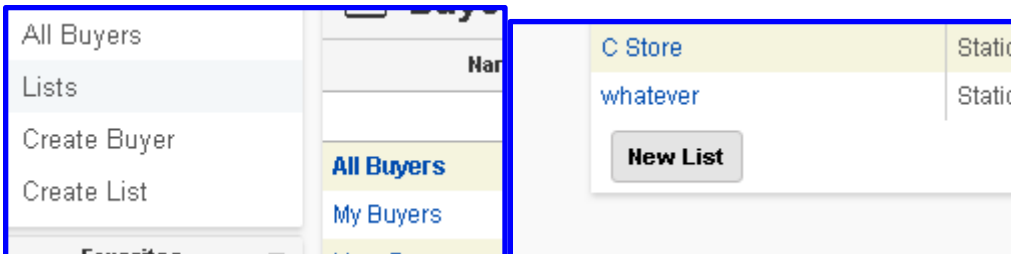
- The **ALL CONTACTS** screen displays every contact in the VERTICA CRM system. Here you can create and populate dynamic or static lists. Dynamic lists are auto-populated based on certain attribute criteria for example, a tag , or deal value. Static lists are manually populated and managed.
- To populate a **static list** of contacts : First tick the boxes next the names of the people you would like to add in your list. This is the main column along the left hand side. This will bring up a new menu option in the grey menu bar along the top of the contact grid. Click on the **MORE** option to open a dropdown menu containing the expanded options. **See below :**

All Contacts									
ID	Buyer Status	Name	Cell Phone	Email	City	Primary Contact Type	Category Type	Company	
	Unregister					Buyer	Select options		
<input type="checkbox"/>	26900	Unregistered	Talwinder Gill	(920) 994-9278	gill727@gmail.com	Belgium	Buyer		
<input type="checkbox"/>	12366	Unregistered	Curt Campbell	(920) 918-7906	curt@oilerie.com	Fish Creek	Buyer	CRE - Retail	Curt's Spice Co & Oilerie
<input type="checkbox"/>	26885	Unregistered	John Kupsh	(920) 901-4230		Valders	Buyer		
<input type="checkbox"/>	14605	Unregistered	Shawn Hennessy	(920) 883-9055	theshawnhennessy@gmail.com	Green Bay	Buyer		Life Church
<input type="checkbox"/>	12318	Unregistered	John Schmitz	(920) 863-4411	jschmitz@LEJones.com	Menominee	Buyer		LE Jones Co
<input type="checkbox"/>	12351	Unregistered	Steve Christoferson	(920) 857-4628	Schristoferson@hatcocorp.com	Sturgeon Bay	Buyer		Hatco Corp
<input type="checkbox"/>	16647	Unregistered	Siggi Witt	(920) 737-9755	siggi@alwin.com	Green Bay	Buyer		Alwin Manufacturing Company
<input type="checkbox"/>	100020	Unregistered	Matt Bookter	(920) 737-7120	mbookter@bankfirstwi.bank	Green Bay	Buyer	CRE - Retail, Marinas & Fishing	Bank First National
<input type="checkbox"/>	4664	Unregistered	Ken Rehn	(920) 737-6755	kenrehn@bankoflux.com	Luxemburg	Buyer	Magazines & Newspapers	Bank of Luxemburg
<input type="checkbox"/>	10762	Unregistered	Bill Schleis	(920) 737-2898	bill@schleis.com	Green Bay	Buyer		Vintage Liquid Emporium
<input type="checkbox"/>	14602	Unregistered	Mark Vansteenburgh	(920) 684-0216	mvansteenburgh@emergingtech-llc.com	Manitowoc	Buyer		Emerging Technologies LLC
<input type="checkbox"/>	14596	Unregistered	Connie Vansteenburgh	(920) 684-0216		Manitowoc	Buyer		Emerging Technologies LLC
<input type="checkbox"/>	12868	Unregistered	Pat O'Connell	(920) 680-5796	patoconnell41@gmail.com	Green Bay	Buyer		
<input type="checkbox"/>	12901	Unregistered	April Hansen	(920) 664-5749	kobranurse@yahoo.com	Marinette	Buyer		
<input type="checkbox"/>	3890	Unregistered	Monty Roloff	(920) 655-8055	mroloff@new.rr.com	Green Bay	Buyer		
<input type="checkbox"/>	9845	Unregistered	Terry Glime	(920) 639-9446	tglimet@theplatinumgroupwi.com	Green Bay	Buyer	CRE - Retail	Platinum Group
<input type="checkbox"/>	21757	Unregistered	Mel Zimmerman	(920) 632-4905	mzimmerman65@yahoo.com	De Pere	Buyer		Klemor LLC
<input type="checkbox"/>	17348	Unregistered	Amy Swanson	(920) 629-9825	alotswanson@lsol.net	Manitowoc	Buyer		
<input type="checkbox"/>	4849	Unregistered	Rich Larsen	(920) 629-8664	rlarsen@manitowoc-marina.com	Manitowoc	Buyer	Marinas & Fishing	Manitowoc Marina
<input type="checkbox"/>	26926	Unregistered	Bradly Schmidt	(920) 621-5491		Suamico	Buyer		
<input type="checkbox"/>	14168	Unregistered	Mike Haverkorn	(920) 619-8982	mwlhc@yahoo.com	Green Bay	Buyer		Haverkorn Construction



To add the contacts to an existing static list, select **ADD SELECTED TO LIST** from the more dropdown, see above. A box with a dropdown menu will appear containing all the existing static lists. This will pop up prompting you to choose the list to which selected records will be added. See above image.

- If you wish to create a *new* static list from the selected contacts : Click **New List From Selection** from the **More** options menu A dialog box will pop up, this will prompt you to enter a name for the new list.
- If you want to view existing contact lists click **Lists** in the left column menu
- A catalog of all contact lists is displayed. An overview of list information appears as well, displaying list name, list type, list creator and a number of list members.
- To create a **dynamic list** click either **CREATE LISTS** in the same left column menu, or “new list” near the bottom of the page. See Below:



Creating Dynamic Lists

Creating a dynamic list involves setting criteria for membership in your list. Vertica CRM will use these parameters to automatically filter out the contacts that don't meet the criteria and populate the list with those that do. You can set the logic type to "AND" which requires that all parameters be met in order for the contact to be included in the list, or "OR" which only requires that at least one parameter be met.

- The minimum amount of filter parameters is one. To add more, click blue {ADD} button below the list of current attributes. highlighted in orange
- Set the parameters. The attribute drop down menu shows a list of all types of information that you can discriminate by. Select one.
- Next, choose the comparison you want the CRM to use to evaluate the attribute type you've selected.
- The attribute highlighted in red is "state" . This comparison selected is "does not contain: The values are state abbreviations separated by commas. This means the CRM will evaluate the addresses of each contact and if the state listed is Arizona, Michigan, or California, it will **NOT** include that contact in the list.
- The "assigned" attribute is highlighted in blue. The value brings up a list of your CRM users. If you want multiple users, hold down the control key as you click.

You can view the full example here:

The screenshot shows the 'Create List' interface. At the top, there are fields for 'Name', 'Type' (set to 'Dynamic'), 'Assigned To' (set to 'Joshua Factor'), 'Visibility' (set to 'Public'), and 'Logic Type' (set to 'AND'). Below these are two rows of criteria. The first row has 'State' as the attribute, 'equals' as the comparison, and an empty value field. The second row has 'Assigned To' as the attribute, 'in list' as the comparison, and a dropdown menu showing 'Super User', 'Sales Team', 'Anyone', and 'Gary Brown'. There is a blue '+Add' button and a green 'Create' button at the bottom.

For further reference see the marketing module.

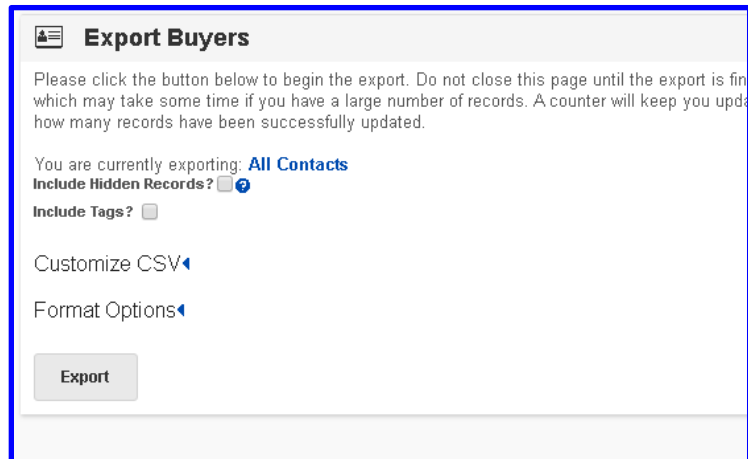
Importing and Exporting Contacts In The CRM

Welcome back to your favorite side column, ACTIONS!

Here you will find the button to click for exporting your buyer/contacts. To begin:

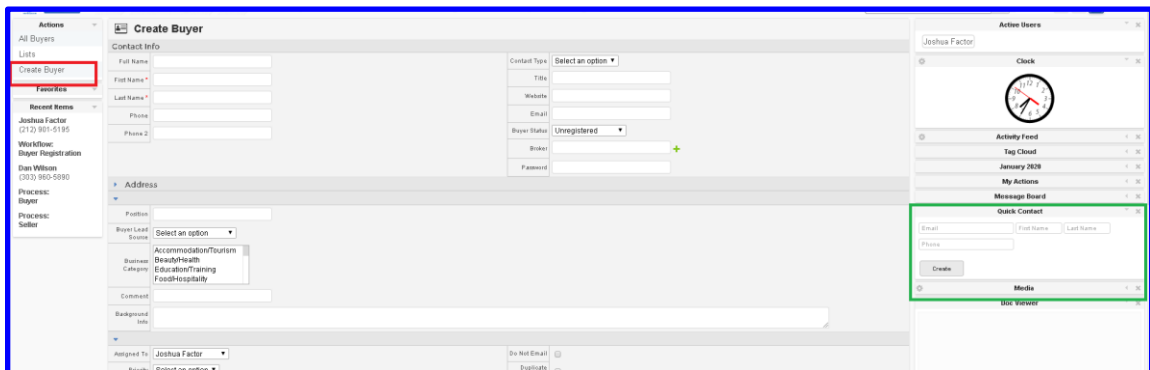
- Use the **Export To CSV** to save the contact list as an exportable **.CSV** file. Use the option to submit a .CSV file and extract a contact list.
- To **Import Contacts** using a .CSV template, first fill in a CSV file where the first row contains the column headers for your records. (for example first_name, last_name. title)
- The application will attempt to automatically map your column headers to our fields in the database. If a match is not found, you will be given the option to choose one of our fields to map to. Ignore the field or create a new field within your own version of the CRM
- If you decide to map the “Create Date” “last Updated” or any other explicit date field, be sure that you have a valid date format entered so that the software can convert to a UNIX timestamp. Visibility should be either “1” for public or “0” for private

**Quick tip: if you don't know the exact format of how you need to prepare your data for the import, even though it's counter intuitive, create a list and export it to the .csv file and then re upload it to the CRM.*

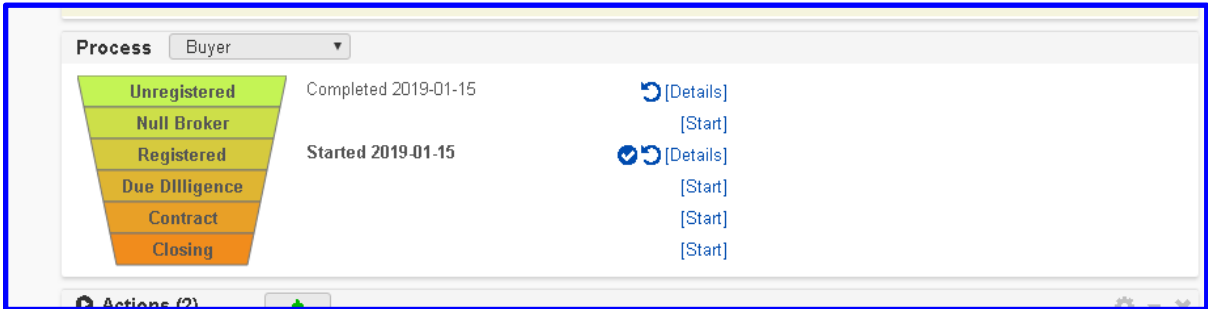


Create Contacts

- Select **Create Contact** in the left column menu, highlighted in a **red box**
- Enter basic contact data, like name, phone, email etc. Also enter sales and marketing information such as lead source, deal values and status. You can also add the contacts usernames for social media. You can add for Facebook, Twitter, m Skype and LinkedIn, These fields will create direct links to those sites.
- You may also associate the lead with an account. Start typing a name in the account field and list of potential existing accounts will pop up. If the account you want exists, choose that from the list. If no account exists, click the + at the right of the account box. This will make a form pop up allowing you to enter all the information for the new account
- You can now assign the contact to a member of your sales staff, or sales groups. Indicate whether this contact is a public or private contact. Finally, finish by clicking the green **“CREATE”** button.
- The **QUICK CONTACT** widget highlighted in **green** on the right side column, can be utilized to easily create simple new contact entries with their basic information. Name, Email, Phone and Address. This can be done from any screen in the CRM.
- You can also use the **Quick Create** option from the left hand side to simultaneously create a contact, account, and opportunity all at once! All from the same screen!



Contact Processes



- Your sales funnel diagram illustrates the contact's current stage within the process, **see above**.
The ultimate goal *obviously* is to turn your leads into customers. However, you need a sales process. Process stages are highly customizable and easily be personalized within different stages to fit your company and brokers.
- The easiest way to indicate that a contact has progressed to the next stage of your funnel is simple. Click the check mark within the current stage, a dialogue box will prompt you for notes on the completion process stage. Once it is completed it should appear in your activity widget. This continues until the final process stage has been reached. You can also click the details option to edit the stage information and create backdated and new completion dates.

For more in depth information please review the process tools section.

Leads

The leads module in the Vertica CRM is designed to allow users to track leads separate from the contact record but still related to contacts and accounts.

The beauty of Vertica CRM is that each company can customize and classify leads as they see fit. The CRM can be configured based on your parameters and reflect on the front end when creating the lead capture forms on your website.

Leads can be defined by your organization how you like. Some companies classify a lead differently than others it is all based on your sales processes and terms. You set the parameters of what you define as a lead, Vertica CRM will adapt to fit your terms and parameters, An individual Contact may have multiple Leads.

A single Account may have multiple Contacts which have Leads associated with them. A Lead can be created as a stand alone Lead or a Contact may be created and a Lead associated with the Contact.

If you start with just a stand alone Lead there is an option to Create a Contact from the Lead and all the data within the Lead record will be transferred to the Contact record and the Lead record will be deleted. If you have an existing Contact which is now a new Lead you can create this Lead by Creating a New Relationship within the Contact record.

Leads Content

- **Lead List Grid View**
- **Create A Lead**
- **Lead Conversion**

Lead List Grid View

	Name	Expected Close Date	Create Date	Last Activity	Assigned To
<input type="checkbox"/>					
<input type="checkbox"/>	Roger Basch		July 12, 2018, 10:02:27 AM	July 12, 2018, 10:02:27 AM	Vertica CRM
<input type="checkbox"/>	George Sieber		July 12, 2018, 10:01:50 AM	July 12, 2018, 10:01:50 AM	Vertica CRM
<input type="checkbox"/>	Samantha Stein		July 12, 2018, 10:01:12 AM	July 12, 2018, 10:01:12 AM	Vertica CRM
<input type="checkbox"/>	Jack Barracato		July 12, 2018, 10:00:34 AM	July 12, 2018, 10:00:34 AM	Vertica CRM
<input type="checkbox"/>	Test Test		June 25, 2018, 10:13:04 AM	June 25, 2018, 10:13:04 AM	Vertica CRM

- Grid view, as seen above, lets you view **All Leads**, sortable by various metrics, you can filter results with the column sector.
- Like before, you can clear filters to stop sorting by specific column and return to the default filter setting.
- Click a lead to view the details.
- Create new leads by clicking on the create lead button on the left side actions column. All this is similar to contact grid view as discussed earlier.

Create A Lead

To create a new lead, simply head over to the left hand action column, click on create a lead and a new page will open up.

Within this page you can create leads. It should look like this : **See below**

Create Lead

Basic Information

First Name *

Last Name *

Sales Stage

Email *

Phone Number

Lead Source

Description

Description

Your Message

Other Info

Expected Close Date

Probability

Assigned To

- To create a lead, all you have to do is enter the leads information. At a minimum, enter first and last name, It is recommended to add the phone number and email address.

- You also have an option to add additional information such as lead status, lead source and description. You may also adjust the sales stage. Click on the drop down menu underneath full name and choose the status of where the lead is holding in your pipeline.
 - You can then fill in the description of the lead whether it is a buyer or seller and whatever information you want to add.
 - You can also associate a lead with an account and assign it to somebody in the company. You can click on a name within the relationships section of both the account and lead, this allows you to move easily between lead and account by clicking on the name within relationships.
 - Once finished, click the **CREATE** button to complete the process!
-

Lead Conversion

With Vertica CRM you have many options for lead conversion.

You can create leads that are converted to buyers or sellers. You may also customize your system to include whatever the specific needs for the company are. I.E. convert to contacts.

Convert Opportunity

- At some point you may determine that the lead has become an opportunity or a buyer or seller depending on how you configure the CRM. For example the lead may have worked through the stages you set up via the process workflow and is now deemed an opportunity.
- You can also create an opportunity directly from the lead. Simply click on **convert opportunity** in your actions toolbar and all the information within the lead will be transferred to a new opportunity record and the system will delete the existing one.
- The broker will now work this as an opportunity and the opportunity can be related to an existing contact and or account from the relationship section. You may relate the opportunity to a specific contact and once you do that, you may want to change the name of the opportunity because the contact may have multiple opportunities assigned to it.

Convert To Contact

- At some point you may determine that the lead has progressed and it should now be a contact.
- You have the option to create a contact directly from the lead. Just click on **Convert to Contact** in your action bar, All the information within the lead will be transferred to the contact record and the system will delete the existing lead.
- The broker will now work this as a contact.



The screenshot displays a CRM interface for a lead record titled "Leads: Jane Smith". On the left, an "Actions" dropdown menu is open, showing options: "Leads List", "Create Lead", "View" (with a sub-menu containing "Journal View" (checked) and "List View"), "Edit Lead", "Delete Lead", "Attach A File/Photo", "Quotes/Invoices", and "Convert to Contact" (highlighted in yellow). The main content area shows the lead details:

Basic Information			
Name	Jane Smith	Email	test1@test.com
First Name	Jane	Phone Number	214 960 5697
Last Name	Smith	Lead Source	
Sales Stage	Pending		

Description	
Description	Message From Form

Other Info	
Expected Close Date	Assigned To: Vertica CRM

If you have a lead in the system already you can go to the Actions toolbox, hit convert to contact and it saves it in your contacts module. One useful application for this is when somebody fills out a lead form on the "Contact Us" page, there is no differentiation between buyer and seller lead. It will be saved in the crm as a lead, and once you qualify them, you can convert them to a buyer or seller in the contacts module accordingly.

As an alternative, our CRM allows you the flexibility to handle Leads, Opportunities, and Contacts all within the Contact Module. The benefit of this approach is that all the information is in one place. The user does not have to bounce between different records to see all the information on a Lead,

Opportunity, and Contact. This minimizes the data entry for any given deal and displays the data all in one place.

Contact as a Lead

With the Vertica CRM API we can set the lead form to place contacts in either the contact module or in the leads module based on your business methodology.

Listings

Listings are a very special feature on your CRM. This reflects what you have on the front end of your website and can be controlled via the CRM and the Data Room. The listings are displayed on the website and can only be accessed once proper channels are taken.

Listing Contents

- **Forms**
 - **The Image Gallery**
 - **Relationships**
 - **The Date Picker**
 - **Hiding information**
 - **Downloading Information**
 - **Adding Buyers To Data Room**
-

Forms

When you open up any listing view you automatically get the short form view. The purpose of this view is to easily record the most important information that a buyer would typically ask on the initial call.

The listings have two forms to them. Long and short. Both serve their respective purposes in order to make your workflow easier.

- The short form is the main page giving you access to add the key information that a buyer asks on the initial call. The long form is meant for recording all the data related to the opportunity. In order to access this, you have two ways to do this.



View Listing: Brooks Auto Sales & Service

<table border="0" style="width: 100%;"> <tr><td>Sales Stage</td><td>Active</td></tr> <tr><td>Name</td><td>Brooks Auto Sales & Service</td></tr> <tr><td>DBA Name</td><td>Brooks Auto Sales & Service</td></tr> <tr><td>Address</td><td>3801 Calumet Ave</td></tr> <tr><td>City</td><td>Manitowoc</td></tr> <tr><td>County</td><td>Manitowoc County</td></tr> <tr><td>State</td><td>Wisconsin</td></tr> <tr><td>Postal Code</td><td>54220</td></tr> <tr><td>Generic Name</td><td>Relocate or Start Your New Business Here!</td></tr> </table> <p>Description</p> <p>Fantastic real estate located on the southwest side of Manitowoc's busy business corridor. While this is a great opportunity for someone in the automotive business, the property can easily be converted to something else. Currently operating and set up as a successful auto dealership and auto service center and body shop.</p> <p>Property features a 3,600 SF metal skin building, situated on .57 acres. Large lighted parking lot holds well over 55 cars. The building has five 10 x 12 overhead doors to facilitate its service business. Included in the purchase price are two above ground auto hoists and one below ground auto hoist. The building has a newer body shop area complete with a dedicated paint area with infrared heat and fresh air exchange. There is a nicely appointed 400 SF office and reception area in addition to the 3,200 SF service area. The property has a large pylon sign located on the highly trafficked Calumet Avenue with nearly 17,000 cars passing each day.</p>	Sales Stage	Active	Name	Brooks Auto Sales & Service	DBA Name	Brooks Auto Sales & Service	Address	3801 Calumet Ave	City	Manitowoc	County	Manitowoc County	State	Wisconsin	Postal Code	54220	Generic Name	Relocate or Start Your New Business Here!	<table border="0" style="width: 100%;"> <tr><td>Ref. ID</td><td>2234</td></tr> <tr><td>Listing Type</td><td>BC</td></tr> <tr><td>Asking Price</td><td>\$359,000.00</td></tr> <tr><td>Terms</td><td></td></tr> <tr><td>Seller</td><td>Don Brooks</td></tr> <tr><td>Agent</td><td>John Foster</td></tr> <tr><td>Agent 2</td><td></td></tr> <tr><td>Agent 3</td><td></td></tr> <tr><td>CRM User</td><td>John Foster</td></tr> <tr><td>Visibility</td><td>Public</td></tr> </table>	Ref. ID	2234	Listing Type	BC	Asking Price	\$359,000.00	Terms		Seller	Don Brooks	Agent	John Foster	Agent 2		Agent 3		CRM User	John Foster	Visibility	Public
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Agent 2																																							
Agent 3																																							
CRM User	John Foster																																						
Visibility	Public																																						

Internal Data ▾					
M&A or Main Street	Main Street	Contract Date	January 20, 2020	Confidential?	No
Category Type	Auto Repair & Service Shops, Car Dealerships	Expiration Date	January 22, 2021	All Confidential?	✗
Listing Status	Active	Date Approved	February 4, 2020, 1:07:00 PM	Financials Confidential	✗
Specialization	Retail	Exclusive?	Yes	Location Confidential	✗
		Featured Listing	✗	Name Confidential	✗

Business Information ▾	
Down Payment	\$0.00
Gross Revenue	
Owners Cash Flow	\$0.00
Store Size (Sq. Ft.)	
Inventory included?	Yes
Inventory Value	
PT Employees	
PT Employees	

Closing Information ▾	
Sale Price	\$0.00
Buyer	
Closing Date	

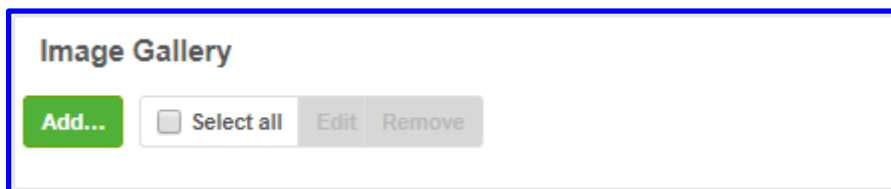
- Click on the edit listing from the actions tool box or click on the edit button  located on the top right corner of the screen! While we are on this topic, if you want to send an email to a buyer with this information, you click on the open email button  and send an email or a listing oriented template.

- The idea of having the main page on form of having the most typical information when on the phone with a buyer.

- The long form shows all data on the buyer this gives the broker access to all relevant information before even picking up the phone,
- You can access this by clicking on the edit listing button in your actions toolbox.

The Image gallery

The listings have an image gallery which you can adjust which images are displayed on the front end for prospects to see.



In order to add image to the gallery, click the button to add images, then browse and select images you want to associate with this listing and they will show up in the photo gallery. If you want the thumbnail to show up in the featured listing box check off thumbnail.

Please note, you can only have one thumbnail per listing, therefore if you set another picture as the listing, then the previously designated image will be removed as the thumbnail.

Edit Information

Name: Great Burger Restaurant

Description:

Thumbnail:

Save Changes Close

We have two types of pictures that show up on listings related to your website.

The thumbnail and the image gallery which shows up on the featured listings bar on the homepage for example. It will also appear on the search page when you search to buy business.

- Click on add, upload a picture after, you can change the image to be the thumbnail image of the listing by checking the box and making sure that the thumbnail box is checked when uploading to listing.
- This is public data and shows up when anybody views your website.
- Those images show up in the photo gallery of your listing.
- On the top left corner of your actions toolbox click the attached file/photo link.
- When you do that a hidden widget pops up where you can either drag and drop or select a file from your computer by hitting “select File”

- Once you select the files you want, they will show up in the box, they will have a check box in the box and show up on the right hand side in your “notes” tool with a paperclip.

Relationship Tool

- Every record in the CRM has a relationship widget. This tool can connect the above record with any other record from the various modules in the CRM, be it a buyer, seller or agent or listing or lead, deal or even a document or a picture.

Buyers Widget

- Any buyer that has inquired on a listing, has had listing added to data room or had the address of the above listing release to the buyer will show up in the buyers widget.

Buyers (1)									
Buyer	Buyer Status	Date approved	Added Date	Added By	Added From	Broker	Released Date	Status	Released By
John Mahoney	Unregistered		8/23/18	Vertica CRM	Backend	Joshua Factor		Added	Vertica CRM

- Click on a buyer- go down to data room widget, click the green plus, next to data room, the number next to the data room title will reflect number of listings
- Click the plus, a small window opens with all listing stored in the listings module.
- You can filter based on columns and search. Like all search processes in the crm.
- Once you filter them all out, find what you want, add a checkbox next that specific listing and simply hit add to the data room.
- The system has protocol in place so that you can't send out information without registering the buyer first.

- If you try to send out an unregistered buyer a popup appears and you have to go and register the buyer.
- Once you hit the save button, it sends an email through the workflow notifying the buyer that he can now view the profiles.
- All emails are stored on the right hand side.
- Pop Ups come up with notifications that are set to show when users open emails or any action set based on your workflow parameters.
- Action button in the data room has two functions,

1. Sends an email to the buyer creating a paper trail. The purpose is to notify the buyer the record was created and yields a time stamp.

2. It adds confidential info onto the business profile. Giving users the ability to view it when they open up the profiles.

The files column has a plus sign, click the plus sign a drops down to all the files that were added on that buyer to the data room.

The Date Picker

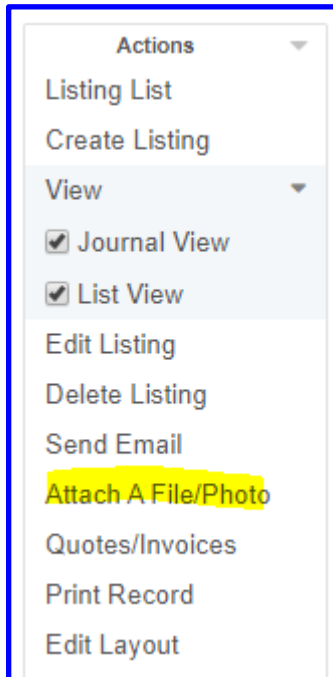
- If you place a date in the date column in the associated file, even though there is a check in the check box next to the file name to release the address.
- That file will disappear and the buyer won't be able to view that file since it will be taken out of the data room automatically.
- The reason for this date picker is to create a sense of urgency for the buyer that have a specific window of time to view the confidential info.
- Once finished, click assigned permission you see a quick saying accepted and the data room is now set.

The Data Room

The ultimate goal with the data room is to share confidential and important documentation with your buyer in a secure manner. Our data is unique in that, with this data room it was built from

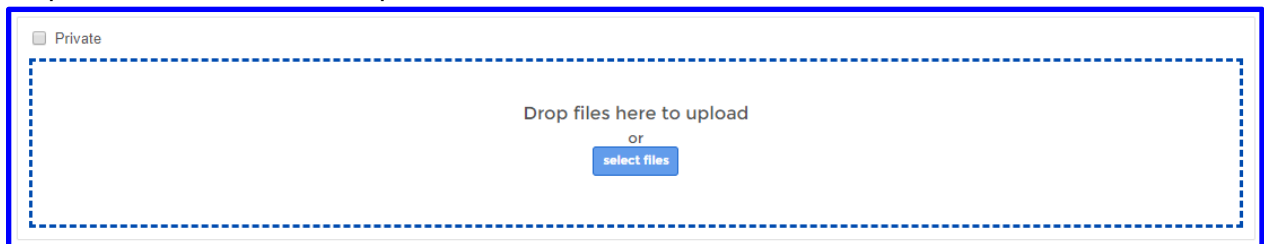
the ground up specific for business brokers. Therefore, our system is a two step process separated between listings and buyers.

First, attach/associate files with a specific listing. The way you do that is by clicking on **attach a**



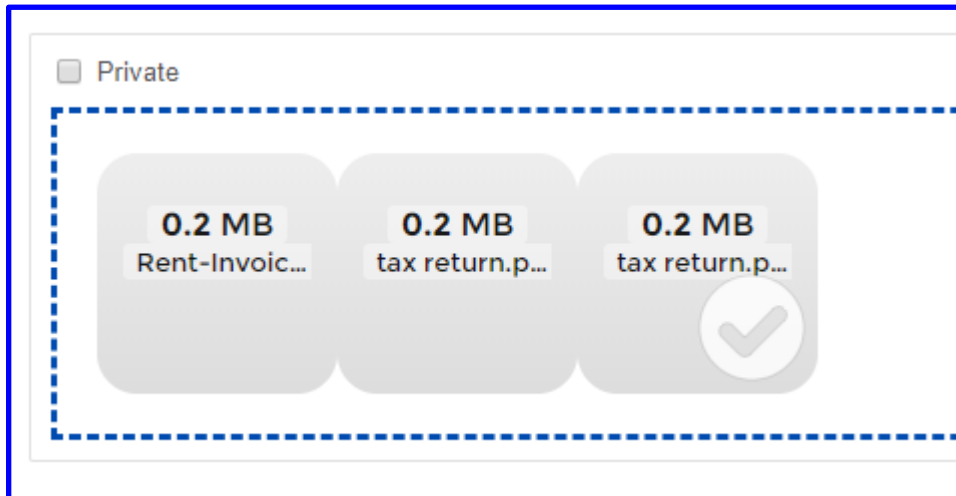
file/photo from the actions toolbox.

Once you click on this button, the screen will jump to a hidden widget where you can drag and drop files to that in order to upload it.

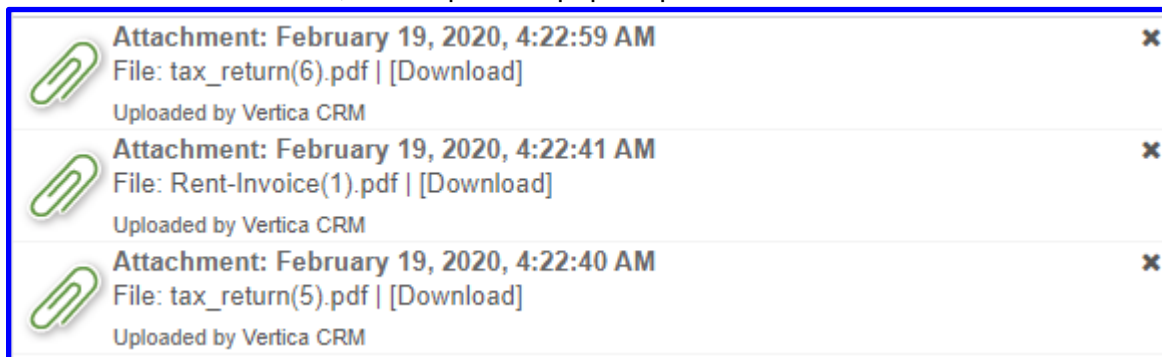


Either drag the file from the widget or from your computer and upload it to the data room.

When it uploads, Once you find what you are looking for, click on upload and they automatically upload. As the files upload, it will confirm by placing a check on the box itself.



Once it is confirmed then addition to the check confirming file upload, you will also see the file underneath the notes tool, show up with a paperclip.

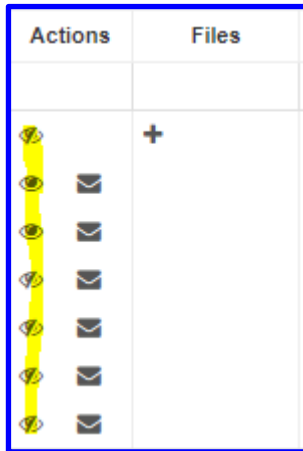


Once that is done all these are now associated with that specific listing.

- When you download the pdf file from the data room, every file will have a watermark that contains the buyers name, the company name date and timestamp and IP address.
- Buyers can't log in to the data room without a password.
- To view- Go to website- click buyer login-put in username and password-click on login and you are automagicy brought to buyers data room.
- Any listing that is expired or not active will not show up in data room

You can request access to the full listing by going into the data room and click request address, this sends an email to the broker telling them buyer is requesting address, the button disappears and broker gets notified in the CRM an email also gets sent to the buyer telling them the broker has been notified.

Hiding Listings



- In the data room, there is a hide button
 - Buyers typically register for one type of business or industry, and spend lots of the brokers time for one specific type, and then change their minds etc.
 - Although you are the broker of record, and you still need to keep track of all the businesses , the buyer has the opportunity to press the **hide button** in the data room or you can hide stuff on the backend as well by clicking the eye button.
-
- It makes you confirm you want to hide information and will appear hidden on the front end.
 - Anytime an action is taken within the data room an email notification goes out.

Deals

Here you can view all your deals that are on file and adjust the settings accordingly. With the deals module, you are able to customize your CRM the way you want in accordance with how your company sees fit.

Deals Content

- **Deals List View**
- **Deals Detail View**

**These views have been covered in previous modules, see other chapters for reference.*

What Is A Deal?

A deal is a culmination of a buyer and seller signing an LOI to purchase a business. We've built the deal module with a deal fact sheet that you have all the information on a potential deal all in one place.

Making the deal that much easier to manage. **I.E We can use location so that anyone involved in assisting this deal to move past the finish line will have easy access to all needed information.** In addition to all the basic information on the contacts form and the listing form, additional information will be relevant at this point such as, attorney information negotiated information,

commission information and any other information you need at this stage in the process.

Create Deal

Basic Information

Name

Asking Price

Negotiated Price

Down Payment

Terms

Cash At Closing

Commission

Franchise Fee

Listing +

Contact +

Lead Source

Description

Description

Buyer Information

Buyer Name +

Buyer Proof Of Funds

Buyers Broker +

Buyer Attorney Name

Buyer Seeking Financing

Seller Information

Seller +

Sellers Broker +

Seller Attorney Name

Lease Information

Lease Assignment New Lease Required

Are There Outstanding Lease Commitments

How Many Years On Lease

Other Info

Create Date

Expected Close Date

Probability %

Last Activity

Any Licenses Of Franchise Agreements Being Transferred

Are There Any Liabilities

Assigned To

**Pro Tip : We have the option to, once we change the sales stage from active to LOI, then we can auto-magically pull the existing information from the buyer, seller and listing record into this new deal record!*

Of course any field that you want to customize we can create that specific field for it

Marketing Module

You have made it this far, congratulations! This is by far one of the coolest and most unique features that we have on the Vertica CRM. Marketing! We've created this module with a very

power set of tools for both inbound and outbound marketing, disseminating sales offers, and automating responses to leads. The Vertica CRM marketing module is a full fledged marketing automation system! Our system provides unparalleled capabilities.

This section will describe how to use each piece of the marketing module and also provide an overview of the best practices of how to successfully launch email campaigns from importing data, creating a segmented list, create the campaign, launch it and monitor the results.

Let's get started....

*Pro Tip: Before going through this module you can reference how to build lists both static and dynamic by revisiting the contacts module.

Marketing Contents

- **Campaigns**
- **Single Email Blasts**
- **Static Campaigns**
- **Dynamic Campaigns**
- **Contact Lists**
- **Import Campaigns**
- **Export Campaigns**
- **Newsletters**

Campaigns

To create a campaign,

1. Click Marketing from the top navigation bar,
2. Then go into the Actions Toolbox on the left side of the screen,
3. Hit **contact lists**

This brings you to the page with all your current **contact lists**. From there you will always see a minimum of three built in lists.

(A) All Contacts (In the system)

(B) My Contacts (All the buyers that are assigned to the individual currently logged in)

(C) New Contacts (Any new contact that is logged in the system)

4. Any custom lists that you have created in the past will show up here.

Name	Type	Owner	Members	Tools
All Contacts	Dynamic	Anyone	5	Q
My Contacts	Dynamic	Vertica CRM	3	Q
New Contacts	Dynamic	Vertica CRM	0	Q

Click on one of your lists, that will show you all the contacts that are currently in that specific list.

Name	Email	Lead Source
		- Select -

Click on the email list button and when click that button it will bring you to the email set up page.

Campaigns						
Name	Contact List	Subject	Launch Date	Active	Last Updated	
<input type="checkbox"/> C Store Dan	Dans List	Newsletter	January 6, 2019	No	January 6, 2019	
<input type="checkbox"/> Manufacturing Plant	Test	Test Business Brokerage Newsletter	December 1, 2018	No	December 1, 2018	
<input type="checkbox"/> C Store	Wendy 4	Greetings	November 1, 2018	No	November 1, 2018	
<input type="checkbox"/> C Store	Mikes List	Greetings	November 1, 2018	No	November 1, 2018	
<input type="checkbox"/> C Store	Test list	Greetings	November 1, 2018	No	November 1, 2018	
<input type="checkbox"/> C Store	Wendy 1	Greetings	November 1, 2018	No	November 1, 2018	
<input type="checkbox"/> Cafe 10 31 19	Cafe			Yes	October 31, 2019	
<input type="checkbox"/> C Store	Lynn Test	Greetings	September 5, 2018	No	September 5, 2018	
<input type="checkbox"/> C Store	Test 1	Test Business Brokerage Newsletter	July 29, 2019	Yes	July 29, 2019	
<input type="checkbox"/> C Store	Pino 1	C Store for Sale	June 5, 2019	No	June 5, 2019	
<input type="checkbox"/> C Store	Peter 1			Yes	May 28, 2019	
<input type="checkbox"/> C Store	Peter 1	C Store for Sale	May 3, 2019	No	May 3, 2019	
<input type="checkbox"/> C Store	Sylvain 1	C Store for Sale	May 2, 2019	No	May 2, 2019	
<input type="checkbox"/> C Store	Tony 1	C Store for Sale	May 1, 2019	No	May 1, 2019	
<input type="checkbox"/> Cafe	Richard Test	Newsletter	April 30, 2019	No	April 30, 2019	
<input type="checkbox"/> Cafe	Yuri 1	Newsletter	April 23, 2019	No	April 23, 2019	
<input type="checkbox"/> Cafe	Test 12333	Business Brokerage Newsletter	March 25, 2019	No	March 25, 2019	
<input type="checkbox"/> Cafe	EFIXEN	Newsletter	March 19, 2019	No	March 19, 2019	
<input type="checkbox"/> Cafe	Tom test	Newsletter	February 25, 2019	No	February 25, 2019	
<input type="checkbox"/> Cafe	test 123	Newsletter	February 20, 2019	No	February 20, 2019	
<input type="checkbox"/> test 1	Tom test	Newsletter		Yes	February 19, 2019	
<input type="checkbox"/> Cafe	Diana	Newsletter		Yes	January 31, 2019	
<input type="checkbox"/> Cafe	Diana	Newsletter	January 23, 2019	No	January 23, 2019	
<input type="checkbox"/> Cafe	Kavita	Listing Price Reduction	January 20, 2019	No	January 20, 2019	
<input type="checkbox"/> Cafe	Robert 1	Newsletter	January 16, 2019	No	January 16, 2019	

The Marketing Automation system provides multiple ways to create and deliver email campaigns. There are three types of campaigns

- **Single Email Blast Campaign (Static)**
- **Long-Term Campaign (Dynamic)**
- **Drip Campaign** (This is performed using the Workflow which we will cover later.)

The Single Email Blast Campaign

- Is designed to send a single email to a segmented list.
- This is the first step in a campaign, determining who you are going to send an email Once you have created the list you can create the campaign.
- Click here to go to **contact lists** to learn how to build a list used in a campaign.

- Lists can be created from either **contacts, accounts, leads, or deals**.
- Once you create a list in one of these modules, you will see it show up in the drop down when you create the campaign.

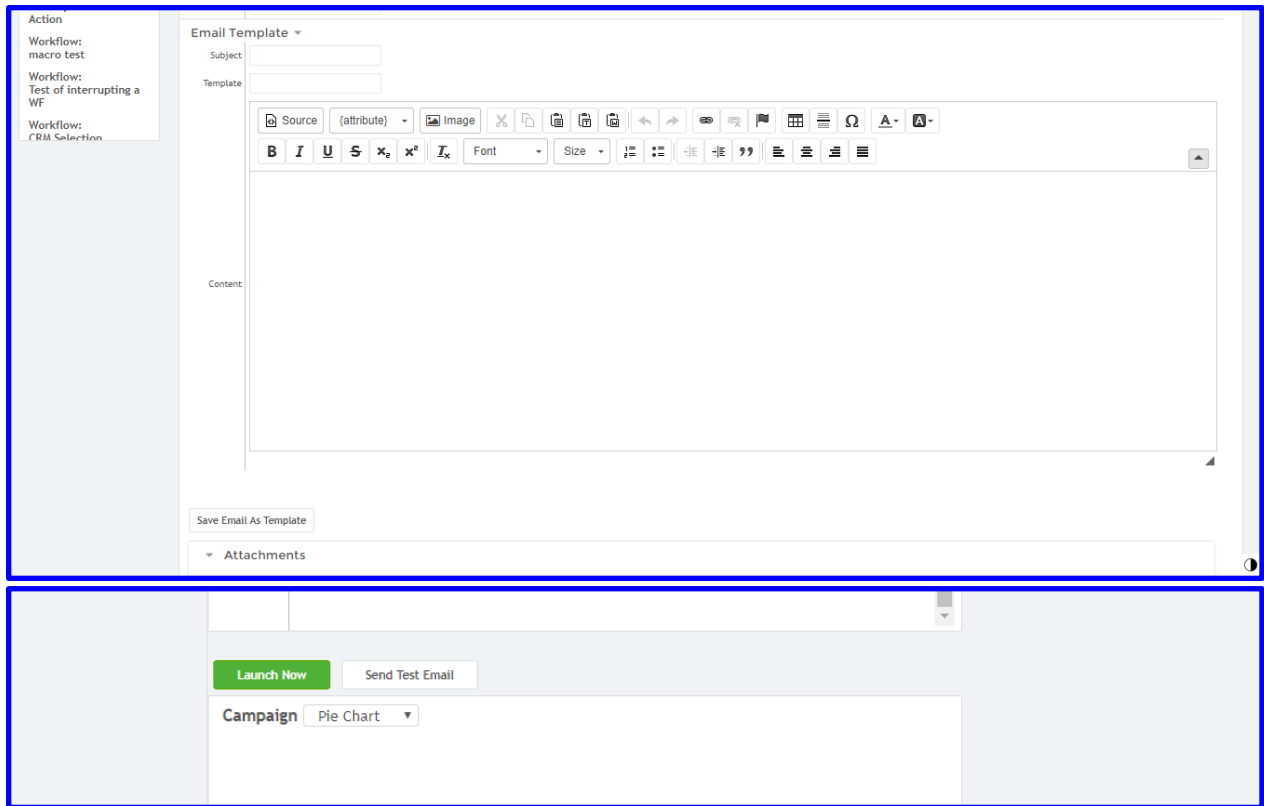
When the user clicks on the Marketing Module, the Grid view that comes up shows all the existing campaigns in the system. The list view displays a catalog of **All Campaigns**. This is an overview of the current and past marketing promotions you've constructed. Our system is so amazing that you can set up high powered campaigns in minutes to be fully automated. **See below**

Creating Campaigns

It's really easy to create campaigns! Here are the steps you need to take when setting up your campaigns!

- Firstl, you have to give it a name! Next choose the list you want to email via the drop downs under list. Once you have done that, you may choose to apply a **suppression list** to the campaign list. Any email you have on the suppression list which is also on the campaign list will not be emailed to. You can choose multiple suppression lists.
- Our system has many different templates to use. You can also create your own templates for your brokers to use. You can create custom templates with your own messages for the campaigns.
- You can add a description of the campaign if you'd like but it is not necessary. Please not when labeling, the **Type should be email**.
- Another cool feature about our email system is categories. This allows brokers to assign a category to the campaign. This is used in the ability of the recipient to unsubscribe from just a specific category of from all emails.
- Now that you have done this, choose which email address the campaign will be sent from. You can connect a third party service to our marketing module if you want! Then you can choose which user should be assigned to the campaign.
- Once you have set all this up, enable the redirect links. This is very important if you have any links in the emails and you want to track those links. By checking off this box, our system will track the clicks!
- You can choose the visibility within users as public or private. If you set it to private, **only the assigned user** will see the campaign.
- Now that you set everything, it's time to set your launch date! You can choose a future date when the campaign will be sent or, if you leave this blank you can launch it yourself!

You can add attachments if you need, once all is taken care of you can click create and the system takes care of the rest!




It's always important to send a test email out before you launch the real thing. This way you can fix any mistakes that you may catch. If you did not specify a **Launch date**, you will see the **"Launch Now"** button along with **"Send a test email"**. You can send a test email and a popup window will appear to allow that to happen.

Our system will show you a list of email recipients and whether they opened, clicked, and unsubscribed. Over the next few days this will update how your recipients react to the email.

Name	Email	Sent: 3	Opened: 2	Unsubscribed: 0	Do Not Email	Opened At	Clicked: 0
Sean Littman	sean@gosimcha.com	✓	✓			Dec 16, 2019 1:11 PM	
Joshua Factor	josh@verticacrm.com	✓	✓			Dec 16, 2019 12:21 PM	
Paul Niccum	pniccum@paradisecapital.	✓					

You can also check the status of the campaign by looking in the status widget. A green check will show completion.

This will also show you the open rate and the click rate of your email campaign and you can gauge how effective it was. This will keep updating every day that the campaign is running.

Status	
Active	✘
Complete	✔
Launch Date	December 16, 2019, 12:20:36 PM 
Open Rate	66.67%
Click Rate	0.00%
Unsubscribe	0.00%

Static Campaigns

These are campaigns that work based off your contacts list.

This campaign is created by filtering out contacts from your list and creating a new list for your email based on those specific contacts.

You start by opening up the contacts module.

Then you click on lists in your actions tool box, this will

Dynamic Campaigns

Dynamic campaigns!

This starts the same way as the static campaigns. You can reference the above sections.

Once you have set the parameters, set how many emails you want in your sequence. And click **create campaign**.

Create List

Fields with * are required.

Name * Type * Assigned To Visibility Logic Type

Attribute	Comparison	Value
Amount of Down Payment	equals	<input type="text"/>
Category	in list	<input type="text" value="Accounting / CPA Firms"/> <input type="text" value="Advertising / Marketing Firms"/> <input type="text" value="Architecture & Engineering Firms"/> <input type="text" value="Art Galleries"/>

[Add]

You can choose the amount of emails you want to go in the series, You can also choose different templates for each email that goes out in the series, Once you have selected your templates you can choose the launch date. You can choose the dates you want each email to go out. These will be shown in the **ALL CAMPAIGN** list view.

Contact Lists

For full explanation, please see the previous section on contact lists referenced on page 34.

Import Campaigns

In this section we will talk about importing your contacts in .CSV to be used for campaigns

Import Marketing from Template

To import your records, please fill out a CSV file where the first row contains the column headers for your records (e.g. first_name, last_name, title etc.). A properly formatted example can be found below.

The application will attempt to automatically map your column headers to our fields in the database. If a match is not found, you will be given the option to choose one of our fields to map to, ignore the field, or create a new field within X2.

If you decide to map the "Create Date", "Last Updated", or any other explicit date field, be sure that you have a valid date format entered so that the software can convert to a UNIX Timestamp (if it is already a UNIX Timestamp even better). Visibility should be either "1" for Public or "0" for Private (it will default to 1 if not provided).

Example

Upload File

No file chosen

Allowed filetypes: .csv

Customize CSV

Import Map

Export Campaigns

You can export your campaigns with a .CSV file. See image

Export Campaigns

Please click the button below to begin the export. Do not close this page until the export is finished which may take some time if you have a large number of records. A counter will keep you updated how many records have been successfully updated.

Include Hidden Records?

Include Tags?

Customize CSV

Format Options

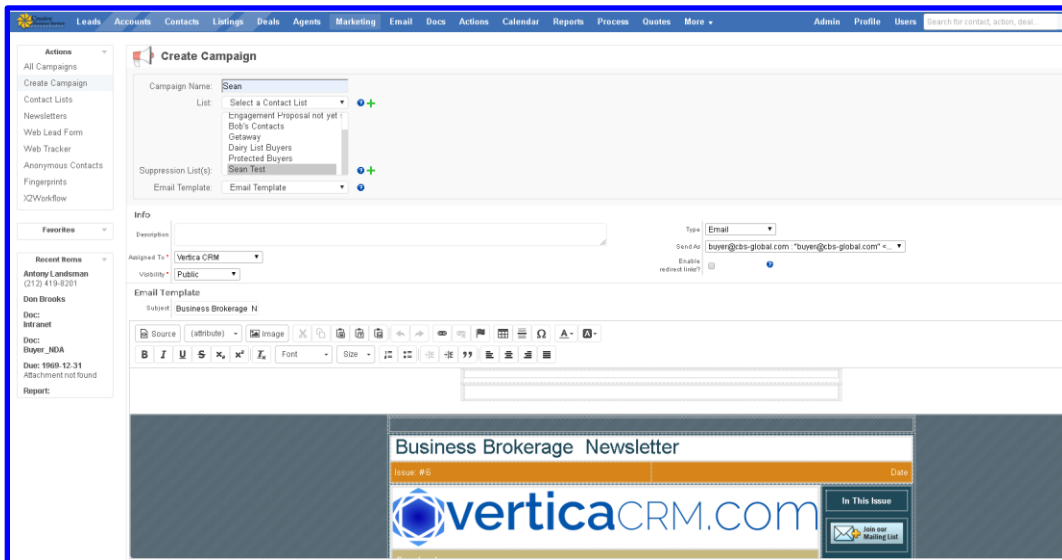
Export

Newsletters

Newsletters are a cool type of campaign, It is more of a type of list. Selecting newsletters from the left column menu brings you to an overview of all the newsletter recipient lists. As with most things in the CRM it works off your contacts lists.

- Creating them is pretty easy too. Start by opening the page. Name the newsletter, add a description, assign an owner and hit create! When you create this, it will be empty at first. You can use pre existing contacts from your contact lists.
- When you click on the newsletter list name, a new screen will pop up. This is a webform. It is a sign up sheet. People add their email addresses to the form and it will automatically be added to the list of recipients for that newsletter. You can make edits to this list of people.

- The newsletter's web form is an embed code that is automatically generated. Copy and paste that code into your website to include the email signup on any of your web pages.
- These forms can be changed to fit the appearance of your site. You can change the text, background colors, fonts borders and more.
- Once the list starts to populate, the recipient list will show you everyone who will receive the newsletter but who have also unsubscribed.
- When you go and click on “**Email entire list**” this will create for you a new instance of a newsletter. From there you are taken to the **create a campaign screen**. You need to enter a name for the specific newsletter and you may enter a description. The email contact list will default to the newsletter contact list that was created.
- You can also select an alternate contact list by typing its name into the data form. We discussed this in the contact lists section.



Once you have done all these steps, you can go to **Create Email Templates**. This will be sent out to your contact list. You can also include dynamic variables Like Or which will be automatically replaced by the appropriate value based on the contacts information.

All that is left to do now is hit the green create button and its go time.

Quotes Module

Now we move on to quotes. This can be defined by your company and how you would like to custom this. With the quotes module, users can easily create custom quotes and invoices. You can create templates to ensure all customer correspondence is consistent with your branding. You have the ability to prepare invoices that ready to go for the closings.

Quote Content

- **Create Quote**
 - **Import Quote/Invoice**
 - **Export Quote/Invoice**
-

Create Quote

Start by heading over to the top bar of your CRM, you will see the quotes module. Open that up and take a look at your actions tool box again. You will have five actions to choose from.

- Quotes List
- Invoice List
- Create
- Import Quote
- Export Quote

- Click on **create quote** and fill in the appropriate fields

- You can add the basic information. You can also select a status as to where the quote is holding. **Draft, presented, issued, and won.**

You can also create a contact associated with this quote.

- When you click the green + a full pop up will appear and you can add all the information associated
- After you have added the contact, you can also add the account associated with the quote, adjust the probability and assign it to any team member.
- You also have the line items, to add what the quote is for.
- After line items we move down to templates. Here you can create a template to use for all quotes and invoices or import the ones you have already used,

Line Item	Unit Price	Quantity	Adjustments	Comments	Price
		0	1	0	\$0.00
Total:					\$0.00

Creating an invoice is the same process.

Import Quotes/Invoices

To import your records, please fill out a CSV file where the first row contains the column headers for your records (e.g. first_name, last_name, title etc.). A properly formatted example can be found below.

The application will attempt to automatically map your column headers to our fields in the database. If a match is not found, you will be given the option to choose one of our fields to map to, ignore the field, or create a new field within X2.

If you decide to map the "Create Date", "Last Updated", or any other explicit date field, be sure that you have a valid date format entered so that the software can convert to a UNIX Timestamp (if it is already a UNIX Timestamp even better). Visibility should be either "1" for Public or "0" for Private (it will default to 1 if not provided).

Example

Upload File

No file chosen

Allowed filetypes: .csv

Customize CSV

Import Map

Export Quotes/Invoices

Include Hidden Records? ?

Include Tags?

Customize CSV

Format Options

To export, click on the button below that says export.
You can click the arrows to choose your parameters, and then start the export.

Do not leave the window while it is exporting.
A counter will keep you updated on how many records have been successfully updated.

That's all!

Docs Module

With this module you can create and share email templates, standardize quotes, upload pre existing or manifest new documents in a rich text editor. Our Documents module acts as a document repository for all of your important business documents so all of your employees can access a centralized information library.

Docs Content

- **List Docs**
 - **Create New Docs**
 - **Create An Email Template**
-

List Docs

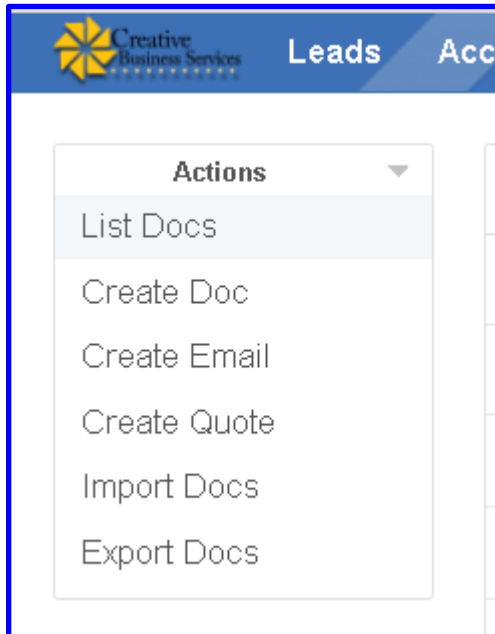
All doc actions are listed in the actions tool box on the left hand side.
To access the docs module, click on the name in the menu bar.

A page will open up with a whole list of files.
They will be marked with a little file icon.

Here you can see all the documents that have been created and by whom.

To upload a new doc, click on **upload file** and navigate your file folders to select the document you'd like to upload. Most files can be uploaded, Then click submit!

See image below. This is what you will see in the actions tool box.



To import docs, choose this option and follow the instructions. These must be in a .CSV

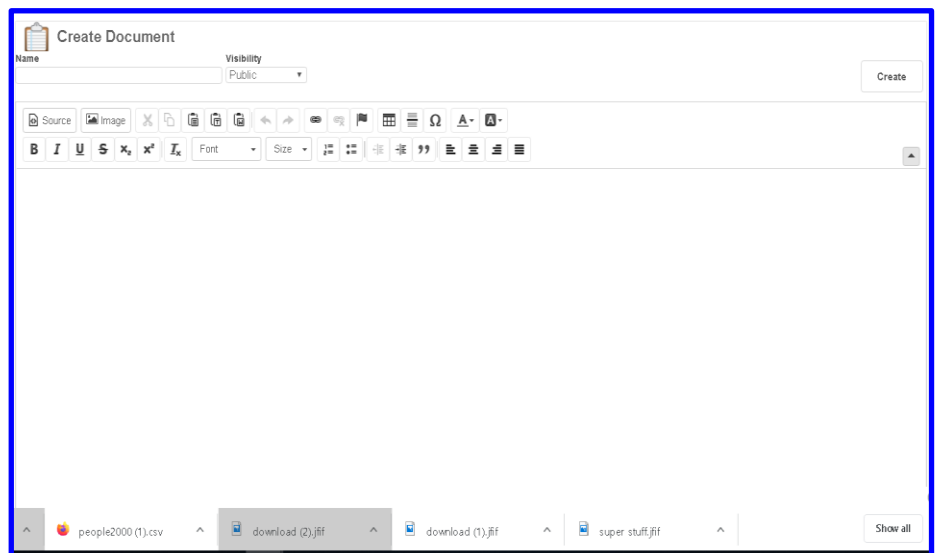
Creating Docs.

This is also quite simple. Go to the actions tool box, click on create doc.

You will get a screen like this.

It kind of looks like an email.

When you open this up, users can edit the text size and font size, set alignment, insert links and modify other such formatting.



You can set your visibility to public or private and once you are ready to go, click the create button

Making an email template is also pretty similar.

Go to the actions tool box, select create an email .

Fill in the parameters, Name, visibility status.

Choose the record type

You can choose the following

- Contacts
- Accounts
- Agents
- Data Room
- Deals
- Listings
- Media
- Leads.

After you have set the record straight :D, fill in who you want to send this to along with the subject. Fill in the information and hit the create button.

That's it!

Media Module

You may need to share and exchange files with your team members from time to time. Whether it is a photo of the latest version of your product or a visual update of the latest from an on location work site, media allows you to share information and files with your team. Photos are by no means the only media type you can upload. You can share documents, mp3s, and much more.

Media Contents

- All Media
- Uploads
- Media Detail View
- The Files Widget

All Media

The screenshot shows the 'Media & File Library' interface. At the top, there is a navigation bar with tabs for Leads, Accounts, Contacts, Listings, Deals, Agents, Marketing, and More. On the right side of the navigation bar, there are links for Admin, Profile, and Users, along with a search box labeled 'Search for contact, action, deal'. Below the navigation bar, the interface is divided into three main sections. On the left, there is a sidebar with 'Actions' (All Media, Upload), 'Favorites', and 'Recent Items'. The 'Recent Items' section lists several workflow steps for different users, such as 'Mike Garsow' and '1 - Valuation - Info Requested'. The main area of the interface is a table titled 'Media & File Library'. The table has columns for File Name, Title, Association, Create Date, Uploaded By, File Size, and ID. The table contains 20 rows of data, each representing a file upload. The files are listed in descending order of their upload date, starting from January 23, 2012, down to January 13, 2012. The file names are mostly PDF documents, and the titles and associations are related to various contacts and listings. The file sizes range from 97 KB to 4 MB. The IDs are numerical values ranging from 2151 to 2169.

File Name	Title	Association	Create Date	Uploaded By	File Size	ID
CA_-_Dayton_Ryan_-_1.23.20.pdf	CA_-_Dayton_Ryan	contacts	January 23, 2012	Mary VandenAvond	103 KB	2169
CA_-_Reiff_Mark_-_1.22.20.pdf	CA_-_Reiff_Mark_	contacts	January 22, 2012	Mary VandenAvond	1 MB	2168
tax_return(3).pdf	tax_return(3).pdf	clistings	January 22, 2012	Vertica CRM	228 KB	2167
Profit_& Loss_2015(1).pdf	Profit_& Loss_2015	clistings	January 22, 2012	Vertica CRM	435 KB	2166
insurance_documents.pdf	insurance_documen	clistings	January 22, 2012	Vertica CRM	140 KB	2165
CA_-_Stone_Jeff_-_1.21.20.pdf	CA_-_Stone_Jeff_	contacts	January 21, 2012	Mary VandenAvond	3 MB	2164
CA_-_Kumar_Brad_-_1.21.20.pdf	CA_-_Kumar_Brad_	contacts	January 21, 2012	Mary VandenAvond	99 KB	2163
CA_-_McCormick_Owen_-_1.20.20.pdf	CA_-_McCormick_	contacts	January 20, 2012	Mary VandenAvond	4 MB	2162
CA_-_Hessel_Jenny_-_1.15.20.pdf	CA_-_Hessel_Jenn	contacts	January 15, 2012	Mary VandenAvond	96 KB	2161
CA_-_Wilkinson_Eric_-_9.10.18.pdf	CA_-_Wilkinson_Ei	contacts	January 15, 2012	Mary VandenAvond	103 KB	2160
CA_-_Kallevig_Dan_-_3.1.18.pdf	CA_-_Kallevig_Dar	contacts	January 15, 2012	Mary VandenAvond	1 MB	2159
CA_-_Egner_Brian_-_6.7.18.pdf	CA_-_Egner_Brian_	contacts	January 15, 2012	Mary VandenAvond	2 MB	2158
CA_-_Anderson_Brent_-_1.15.20.pdf	CA_-_Anderson__E	contacts	January 15, 2012	Mary VandenAvond	103 KB	2157
CA_-_Morrison_Mary_-_1.15.20.pdf	CA_-_Morrison_Ma	contacts	January 15, 2012	Mary VandenAvond	99 KB	2156
CA_-_Neilson_Eric_-_1.14.20.pdf	CA_-_Neilson_Eric_	contacts	January 14, 2012	Mary VandenAvond	623 KB	2155
CA_-_Sanchez_Rolando_-_1.10.20.pdf	CA_-_Sanchez_Rc	contacts	January 14, 2012	Mary VandenAvond	97 KB	2154
CA_-_Bockman_Gerald_-_10.30.19.pdf	CA_-_Bockman_Gi	contacts	January 13, 2012	Mary VandenAvond	1 MB	2153
CA_-_Hellman_Daniel_-_9.23.19.pdf	CA_-_Hellman_Dar	contacts	January 13, 2012	Mary VandenAvond	1 MB	2152
CA_-_Meehan_Evan_-_7.10.19.pdf	CA_-_Meehan_Eva	contacts	January 13, 2012	Mary VandenAvond	1 MB	2151

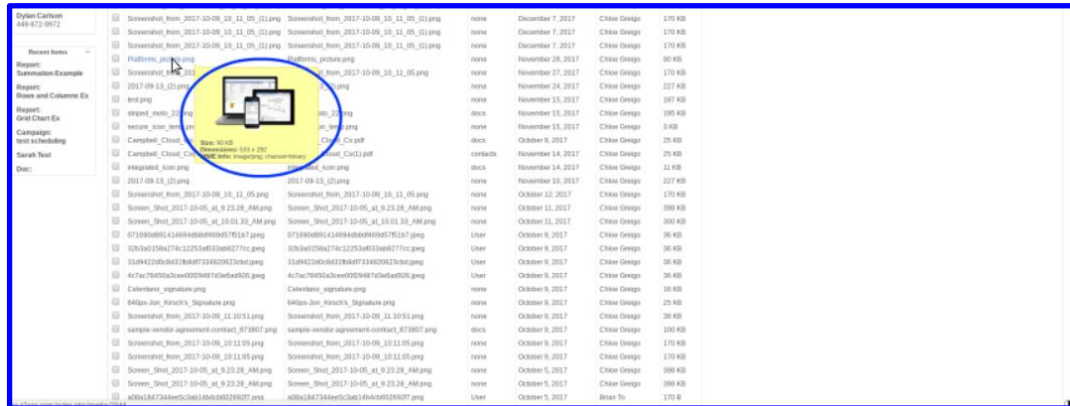
This is what your media page looks like.

To access go up to the menu bar,. You will see a tab that says **More**.

Click that, a drop down will appear, scroll down to media.

Open up the page, inside you will see a list of files.

If you hover over the files an image will appear showing what type of file it is.



Like this:

Uploading is also easy,

- Select your files. We can modify the default upload space to meet your specifications if needed please contact our support team.
- Our CRM can upload the following:
.exe, .bat, dmg.js, .Jar, .swf, .php, .hyaccess, .py and .rb. You can find the full list of what is not able, in the upload page.
- Create associations for the media. **Link** an opportunity, contact or even an account. You can also list the media as a background.
- Add a description to the media and set its permissions either public or private. If it is marked private, only you the user can see it.

Media Full View

Here you can click on a file and open it up. The full view here looks similar to the other modules we have covered. You have the same widgets etc.

In full view you can update media or delete the media you are viewing. You can also view and add to the action history of the media. You can also log calls, create associated actions and even add comments. You'll be able to find the actions in the area below the text areas in the widget.

If you are the owner of that media, you can update its **privacy setting** by checking or unchecking the privacy box.

The Reports Module

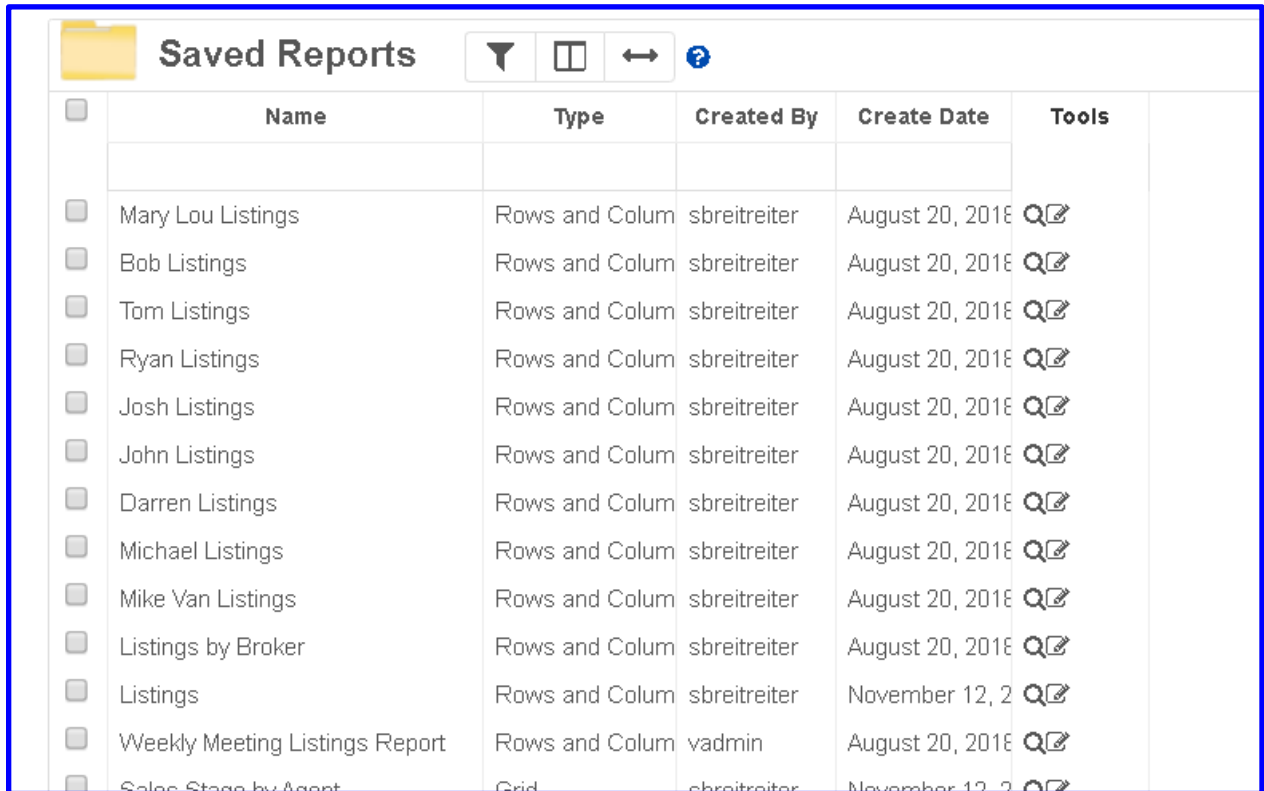
Reports are key to understanding everything we do and how we run our business. By having all your data in one place, this module will be a very useful tool for any broker in your company. With our reports module you can monitor pretty much anything in the system!

Contents

- **Introduction**
 - **Grid Report**
 - **Rows and Columns Report**
 - **Summation Report**
 - **Lead Performance**
 - **User Activity**
 - **Charts**
-

Introduction

When you open up the reports module, you will be taken to a page that looks like this



The screenshot shows a web interface titled "Saved Reports". It features a table with the following columns: Name, Type, Created By, Create Date, and Tools. The table contains 14 rows of data, each representing a saved report. The "Type" column for most reports is "Rows and Column", while the last one is "Grid". The "Created By" column lists various users, including "sbreitreiter" and "vadmin". The "Create Date" column shows dates from August 20, 2018, to November 12, 2018. Each row has a "Tools" icon in the rightmost column.

	Name	Type	Created By	Create Date	Tools
<input type="checkbox"/>					
<input type="checkbox"/>	Mary Lou Listings	Rows and Column	sbreitreiter	August 20, 2018	🔍✎
<input type="checkbox"/>	Bob Listings	Rows and Column	sbreitreiter	August 20, 2018	🔍✎
<input type="checkbox"/>	Tom Listings	Rows and Column	sbreitreiter	August 20, 2018	🔍✎
<input type="checkbox"/>	Ryan Listings	Rows and Column	sbreitreiter	August 20, 2018	🔍✎
<input type="checkbox"/>	Josh Listings	Rows and Column	sbreitreiter	August 20, 2018	🔍✎
<input type="checkbox"/>	John Listings	Rows and Column	sbreitreiter	August 20, 2018	🔍✎
<input type="checkbox"/>	Darren Listings	Rows and Column	sbreitreiter	August 20, 2018	🔍✎
<input type="checkbox"/>	Michael Listings	Rows and Column	sbreitreiter	August 20, 2018	🔍✎
<input type="checkbox"/>	Mike Van Listings	Rows and Column	sbreitreiter	August 20, 2018	🔍✎
<input type="checkbox"/>	Listings by Broker	Rows and Column	sbreitreiter	August 20, 2018	🔍✎
<input type="checkbox"/>	Listings	Rows and Column	sbreitreiter	November 12, 2018	🔍✎
<input type="checkbox"/>	Weekly Meeting Listings Report	Rows and Column	vadmin	August 20, 2018	🔍✎
<input type="checkbox"/>	Sales Stage by Agent	Grid	sbreitreiter	November 12, 2018	🔍✎

This is a window that shows you all the saved reports for all the brokers.

You can see that there are four columns

Name, Type, Created By and Created Date.

In the type column, it says **Rows and Columns**. You can filter everything to where it needs to go.

Grid Reports

The grid report organizes data by grouping it based on two fields of the model. See below.

Grid Report

Primary Record Type
Contacts

Row Field
A-Z Report on the business

Column Field
A-Z Report on the business

Cell Data Type
Count

Records must pass all of these conditions:
Add Condition

Records must pass any of these conditions:
Add Condition

Generate

	Total	No	Yes
No	35957	35957	0
Yes	2	0	2
Total	35959	35957	2

It is conducive to use this if you'd like to have a more linear view of your reporting data.

- **Column Field** - The field you choose here will become the column headers of the report. Try to select a field with a limited amount of values.

- **Row Field-** The field you choose here will become the row headers. It should be the field with more possible values than the column field (pagination will help you sort through all the values)
 - **Cell Data-** This is what each cell of the grid will display. “Count” will simply display how many records match the column and row value for that cell. If an aggregate value is selected such as “**Deal Value**” it will either sum, average, or find the max/min of those values.
-

Rows and Columns Builder

Rows and Columns Report

Primary Record Type
Contacts ▼

Records must pass all of these conditions:
Add Condition

Records must pass any of these conditions:
Add Condition

Columns:
[Empty text box]

Order by:
[Empty text box]

Include totals row?

Generate

No results found.

The Rows and Column Report will let the user generate a list of records, based on criteria. It is essentially a glorified grid view.

Columns- The fields chosen here will appear as the various columns of the report, in the order you choose. It contains all of the fields of the record as well as all of the fields of related records.

Summation Report

The screenshot shows a web interface for a CRM system. At the top, there is a navigation bar with the following items: Leads, Accounts, Contacts, Listings, Deals, Agents, Marketing, and More. Below the navigation bar, the main content area is titled "Summation Report". On the left side, there is a sidebar with a menu under "Actions" containing: Charting Dashboard, Saved Reports, Grid Builder, Rows & Columns, Summation, Lead Performance, Process, User Activity, and External Reports. Below the "Actions" menu is a "Favorites" section and a "Recent Items" section. The "Recent Items" section lists three items: "Antony Landsman (212) 419-8201", "Workflow: 1 - Valuation Process", and "Workflow: 1 - Listing Activated - Seller". The main content area on the right has a yellow folder icon and the title "Summation Report". It contains several sections: "Primary Record Type" with a dropdown menu set to "Contacts"; "Groups must pass all of these conditions:" with an "Add Condition" button; "Groups must pass any of these conditions:" with an "Add Condition" button; "Groups:" with a text input field; "Aggregate Columns:" with a text input field; "Group Order:" with a text input field; a checkbox labeled "Include totals row?" which is currently unchecked; and a "Drill Down" section with a "Generate" button.

The Summation Report will let you group data, and generate drill-down lists for those groups.

First you need to select the primary record. Set your conditions. Then select groups.

Then you need to select groups.

Groups- You can select an attribute from the drop down menu to group together.

Aggregate terms- Different aggregate forms of numeric fields of the model.

Drill Down- Summation reports let the user create inline reports showing the records in a group. These drill down reports are identical to a rows and columns report.

Lead Performance

This will show you the status of your leads and how they are doing in the pipeline.

Open up the module from the actions tool box.

Select what you want to view in the **process** drop down.

I.E **Buyer** select the start date and date, choose your date range and field you wish to view, than hit **Go!**

You will generate a report that looks like the following

User	Contacts	Unregistered	Null Broker	Registered	Due Dilligence	Contract	Closing
Anyone	81	0	0	0	0	0	0
Bob Wolter	1	0	0	0	0	0	0
Darren Harrington	1	0	0	0	0	0	0
John Foster	5	0	0	0	0	0	0
Josh Phillips	1	0	0	0	0	0	0
Karen Marchant	3	0	0	0	0	0	0
Mary Lou VanDeusen	1	0	0	0	0	0	0
Michael Schwantes	2	0	0	0	0	0	0
Vertica CRM	1	0	0	0	0	0	0
Anyone	96	0	0	0	0	0	0

Process/Status

In this module you can create a report to see where the brokers are holding in the sales process.

It works the same as the above,

Select the status from the drop down.

This includes the following

- Buyer
- Listing
- Address Release
- Seller
- Deals
- Valuations

After, select the stage at which the deal is currently in. Choose your start and end dates, create a date range and hit **Go!**

Status

Buyer Stage: Any stage Start Date: December 30, 2019 End Date: Today Date Range: Custom Strict Mode

Contacts

Name	Cell Phone	Last Updated	Lead Source
<i>No results found.</i>			

If you have contacts, they will appear in the contacts area.

User Activity

With this, you can create reports on the user activity to show what the brokers are doing.

User Activity

Start Date: End Date: Date Range:

Full Name	Last Login	Records Updated	Actions Completed	Actions Due
No results found.				

Add your dates and hit **Go**.

A report will be generated that looks like this :

User Activity

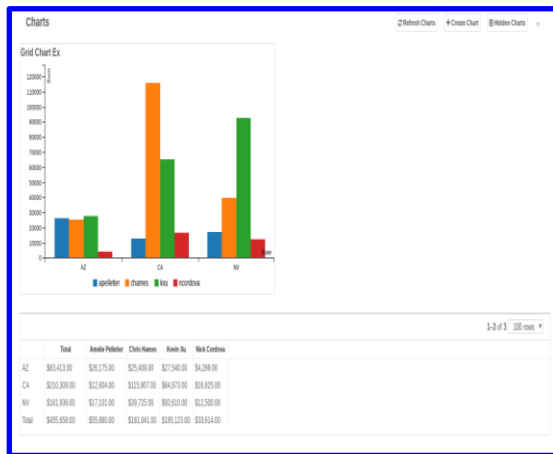
Start Date: End Date: Date Range:

Displaying 1-16 of 16 results

Full Name	Last Login	Records Updated	Actions Completed	Actions Due
Bob Wolter	January 29, 2020, 1:16:53 PM	0	2	3
Darren Harrington	December 9, 2019, 1:59:00 PM	0	0	0
Gary VanSistine	January 29, 2020, 4:53:37 PM	8	0	0
Glen Herman	January 29, 2020, 1:51:06 PM	0	0	0
John Foster	December 17, 2019, 3:52:37 PM	0	0	0
Josh Phillips	December 9, 2019, 3:25:31 PM	0	0	0
Karen Marchant	January 24, 2020, 4:50:18 PM	111	7	7
Mary Lou VanDeusen	December 9, 2019, 2:04:36 PM	0	0	0
Mary VanderAvond	January 29, 2020, 1:27:15 PM	5562	207	207
Michael Garsow	January 29, 2020, 2:15:10 PM	3	0	0
Michael Schwantes	January 3, 2020, 1:13:23 PM	0	0	0
Mike Van	December 9, 2019, 2:05:26 PM	0	0	0
Ryan Pankratz	December 9, 2019, 2:03:42 PM	0	0	0
Sarah Breitreiter	January 29, 2020, 4:46:19 PM	5715	103	101
Tom Martin	January 29, 2020, 1:21:41 PM	0	0	0
Vertica CRM	January 29, 2020, 2:32:59 PM	82	22	21

You can see all users, when they last logged into the CRM when the last time they updated records, how many actions they completed and what actions are due and when.

Charts



Charts are another convenient way to display your data reports. You can even add them to your dashboard as a widget.

To create Charts, you will go through the same process as you did to create the reports only this time it will generate a chart.

Calendars Module

Calendar provides a simple overview of actions and events that you or members of your team have created. Easily view all of your company's upcoming events, meetings, or important dates on a single calendar.

Contents

- **View Calendar and Create Events**
- **Manage Calendar**

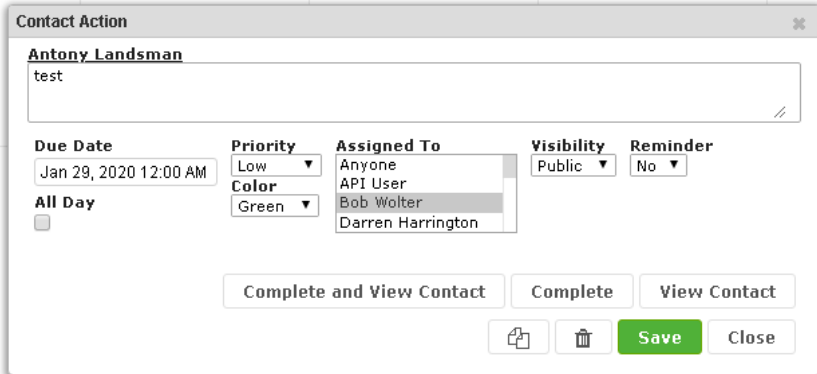
View Calendar And Create Events

- To access the calendar go to the menu bar, click on more, and you will see calendar, This works similar to Google calendar you can view based on week, days or months.
- On the left hand side, you can check off which users you want to receive event notifications from. You can use this to view what the brokers are doing and see what events they have scheduled.
- When you go create a calendar event, you have full control over all the details for the events.

- You can set your calendar events to **public** or **private**. Colleagues will only be able to see public events. Set the public visibility of an event by clicking on it. Or you can create events with the **new event publisher**. Additionally, customize the event's date, priority, who it is assigned to and more.
- In addition to setting general public visibility for events, you can also use the **my calendar permissions** option to explicitly stipulate which individuals can and cannot view from your calendar. You can also allow specific user to edit calendar events if you wish.
- For admins, you can do this for all users, via **user calendar permissions**.

Manage Calendar

It is easy to manage the calendar. All you have to do is click on any date in the calendar. A pop up will come that looks like this:



The screenshot shows a 'Contact Action' dialog box. At the top, it displays the name 'Antony Landsman' and a text area containing 'test'. Below this, there are several configuration options: 'Due Date' set to 'Jan 29, 2020 12:00 AM', 'Priority' set to 'Low', 'Assigned To' with a dropdown menu showing 'Anyone', 'API User', 'Bob Wolter', and 'Darren Harrington', 'Visibility' set to 'Public', and 'Reminder' set to 'No'. There is also an 'All Day' checkbox which is currently unchecked. At the bottom of the dialog, there are five buttons: 'Complete and View Contact', 'Complete', 'View Contact', 'Save', and 'Close'. The 'Save' button is highlighted in green.

Choose what you want to do and save the action into the date.

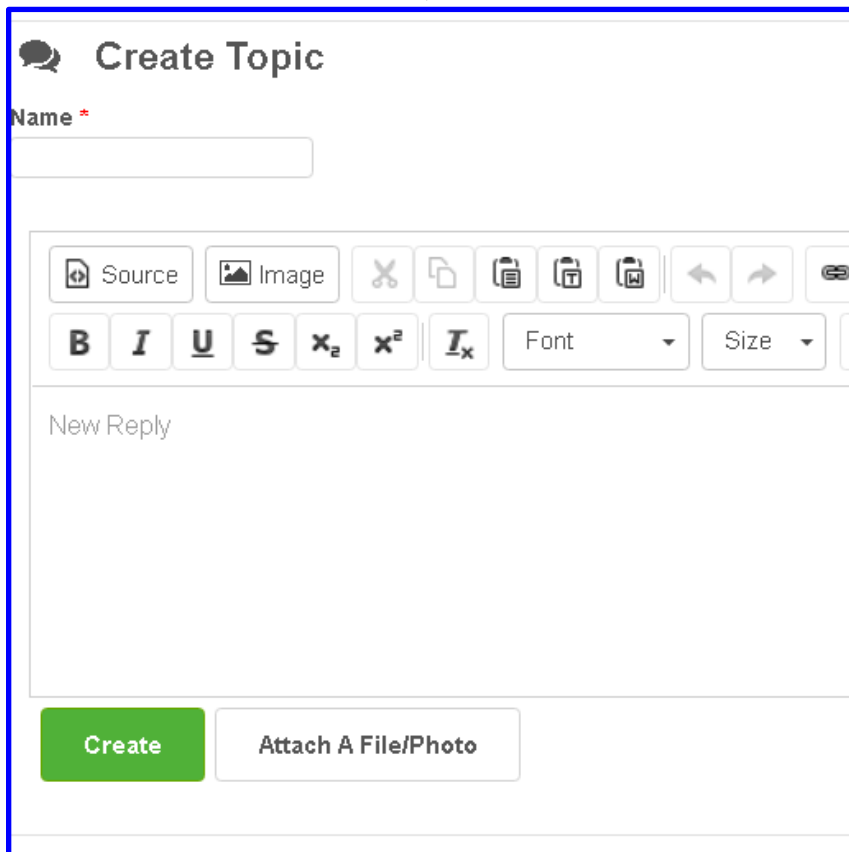
That's it!

Topics Module

*Think Facebook, but in your CRM. That's what we have done with **Topics**.*

Users can chat, interact, post questions and more. You can create forums to make asking questions easier. It is also the best place to create subject matter to share if you are an expert one topic! I.E if you the expert and selling Widget Companies, you can use this a means to share your knowledge with your team.

Create Topic- go to the actions tool box, click create topic. Name your topic, and add your information. You can attach files, links and more. See below.



The screenshot shows a 'Create Topic' form. At the top left is a speech bubble icon and the title 'Create Topic'. Below the title is a text input field labeled 'Name *'. Underneath the input field is a rich text editor toolbar containing icons for Source, Image, Cut, Copy, Paste, Undo, and Redo. Below the toolbar are buttons for Bold (B), Italic (I), Underline (U), Strikethrough (S), subscript (x₂), superscript (x²), and Link (I_x). There are also dropdown menus for 'Font' and 'Size'. Below the toolbar is a large text area with the placeholder text 'New Reply'. At the bottom of the form are two buttons: a green 'Create' button and a white 'Attach A File/Photo' button.

Once you create a topic, it will appear on the main page and you can see who has responded and who is following.

See below.

 Topics		Sorting
Test: Selling Laundromats	1 reply	
Training Questions	0 replies	
My New Topic	0 replies	
How to create and manage contacts	0 replies	
Gas Stations	1 reply	

Actions Module

Welcome to actions! These are your best friends and act as a to-do list. They also act as an easy way to manage tasks and activities. You can also see what other brokers are doing if they have made their actions public. The actions will have a description, name, who it is assigned to, who it was completed by, creation date, due date and when it was last updated. Actions can be built into the workflow so that they can be automated or manual as created from 2 places. The contact/listing record or the actions module itself. Because the action module controls activity you also have the option of making this your primary screen. I.E you can make this automatically log you in to your actions tool.

Actions Content

- **Today's Actions**
 - **All My Actions**
 - **Everyone's Actions**
 - **Create Action**
 - **Import Actions**
 - **Export Actions**
-

Today's Actions

This page displays all your actions that you have set up for the day.

All My Actions

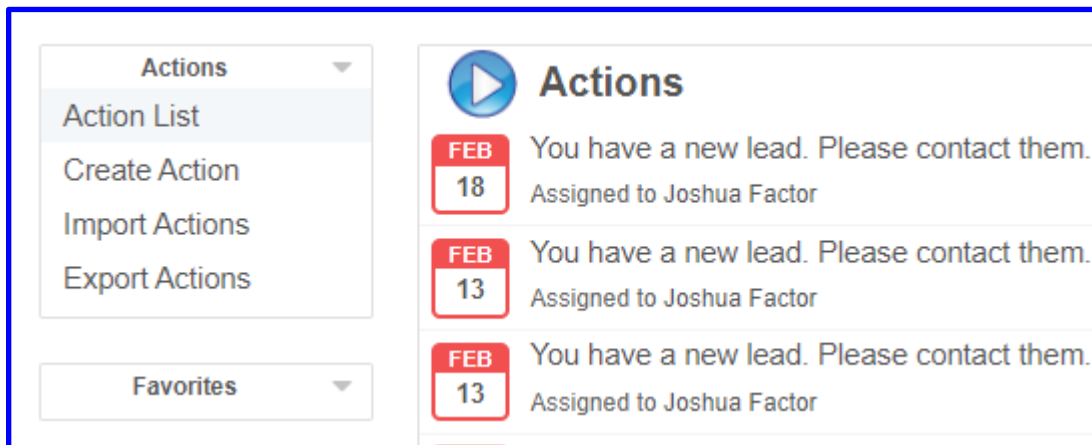
This displays all your actions that have been added/created and are here for you to see.

Everyone's Actions

This displays all users actions that have been made public.

Views

You two views as before. List and Grid. They function similar to the other modules we covered but look like this :



This is the list view

Today's Actions [Switch to List](#)

<input type="checkbox"/>	Action Description
<input type="checkbox"/>	Buyer Added listing
<input type="checkbox"/>	You have a new buyer Akiva Ranells. You have two days to make initial contact.
<input type="checkbox"/>	You have a new buyer Richard Carter. You have two days to make initial contact.
<input type="checkbox"/>	You have a new buyer Akiva Ranells. You have two days to make initial contact.
<input type="checkbox"/>	Buyer Added listing
<input type="checkbox"/>	You have a new buyer Edward Valaitis. You have two days to make initial contact.
<input type="checkbox"/>	Buyer Added listing

The Grid View

Actions: Ray Gingras

Subject	call buyer to follow up
Action Description	call buyer to follow up
Association	Ray Gingras
Assigned To	Joshua Factor, Test Tester
Priority	Low
Status	Overdue

Due Date	July 31, 2019, 12:00:00 AM
Create Date	July 31, 2019, 9:42:51 AM
Last Updated	July 31, 2019, 9:42:51 AM

Tags
Drag tags here from the tag cloud widget or click to create a custom tag.

Completion Notes

[Complete](#) [Complete + New Action](#)

Create Actions

The screenshot shows a 'Create Action' form with the following fields and sections:

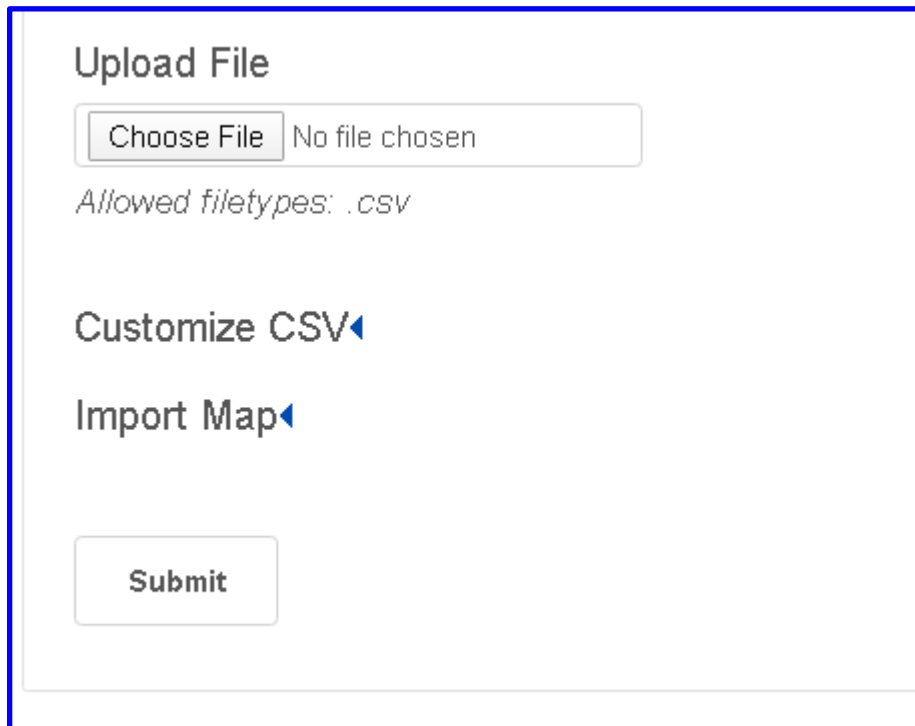
- Subject:** A text input field.
- Action Description:** A large text area for describing the action.
- Association Type:** A dropdown menu with 'None' selected.
- Due Date:** A date input field.
- Priority:** A dropdown menu with 'Low' selected.
- Assigned To:** A dropdown menu with a list of users: Ryan Pankratz, Sarah Breitreiter, Tom Martin, and Vertica CRM (highlighted).
- Visibility:** A dropdown menu with 'Public' selected.
- Action Reminders:** A section with a checkbox 'Create a notification reminder for' followed by a dropdown 'the assigned user' and a dropdown '15 minutes', followed by the text 'before this action is due'.
- Action Backdating:** A section with a right-pointing arrow.
- Add to Calendar:** A section with a right-pointing arrow.

- Choose A Subject
- Add your description
- Choose association type, due date, priority, who it is assigned to and visibility.
- Choose an action reminder
- Choose a back date
- Add it to calendar and hit **Save**

Import Actions

To import your records, please fill out a CSV file where the first row contains the column headers for your records (e.g. first_name, last_name, title etc.). A properly formatted example can be found below.

The application will attempt to automatically map your column headers to our fields in the database. If a match is not found, you will be given the option to choose one of our fields to map to, ignore the field, or create a new field within X2.



Upload File

No file chosen

Allowed filetypes: .csv

Customize CSV ◀

Import Map ◀

Export Actions

To export actions, click on the button that says export. See image. It will work the same as exporting contacts. See Exporting Contacts

Include Hidden Records? [?](#)

Include Tags?

Customize CSV [◀](#)

Format Options [◀](#)

Admin Tools Module

The admin interface provides both administrators and developers with a wide range of tools, services, and documentation resources to manage and extend the CRM. This module requires administrative level clearance in order to access it. The Admin module contains a considerable amount of utility; This guide is broken down into further sections. Click on a menu item below and you will be directed to that section.

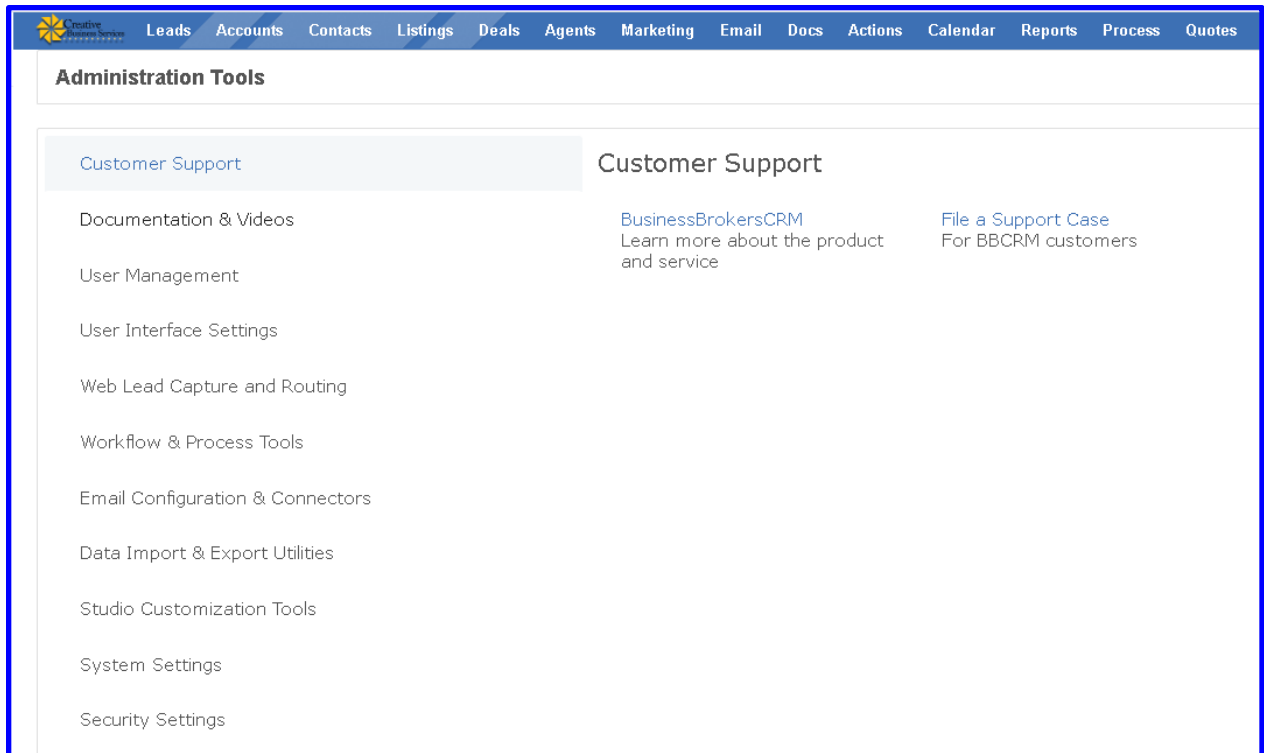
Admin Contents

- **Admin Dashboard**
- **Customer Support**
- **Documentation & Videos**
- **User Management**

- **User Interface Settings**
 - **Web Lead Capture & Routing**
 - **Workflow & Process Tools**
 - **Email Configuration & Connectors**
 - **Data Import & Export Utilities**
 - **Studio Customization Tools**
 - **System Settings**
 - **Security Settings**
-

Admin Dashboard

This is only accessible to an admin user. Regular agent do not have access to this
Click on the admin button at the top of your menu bar next to profile.



Once inside, you will see all the different options which we will cover now.

Customer Support

Here you have two options:

You can learn more about the Business Broker CRM. This will redirect to our website.
The next is **File a support case.**

This will redirect you to our site, where you can file a support request.

In order for you to file a support request you need to have a valid account in our system. This is primarily the main point of contact within your company. Once you submit your email, you can

see all the tickets below that were submitted and you can create a new one.

Customer Support Services

This is your customer service and technical support portal.

Technical Support

Enter your email address below to view your existing support tickets or to open a support ticket online for technical assistance.

Please enter your email address and click View Tickets:

Customer Service

For general questions, account maintenance, licensing and renewals, or to update or merge company information, please contact your sales representative directly or send an email to support@verticacrm.com.

Customer Support Services

This is your customer service and technical support portal.

Technical Support

Service Tickets for **undefined**

Ticket No.	Last Modified	Affecting	Status	Impact	Description
<input type="button" value="create new ticket"/>					

Customer Service

For general questions, account maintenance, licensing and renewals, or to update or merge company information, please contact your sales representative directly or send an email to support@verticacrm.com.

This window will appear giving you the option to create a new ticket or view all the existing and outstanding requests.

**Please note this tool is built primarily for troubleshooting service requests and not for new customizations.*

After you click on create a new ticket, you will get taken to this window, giving you options to choose from and how we can assess the problem. Once you have filled out the description, hit create ticket and this will automatically send your ticket to our support team.

Customer Support Services

This is your customer service and technical support portal.

Technical Support

New Service Request for undefined

This problem is affecting my:

I consider this problem:

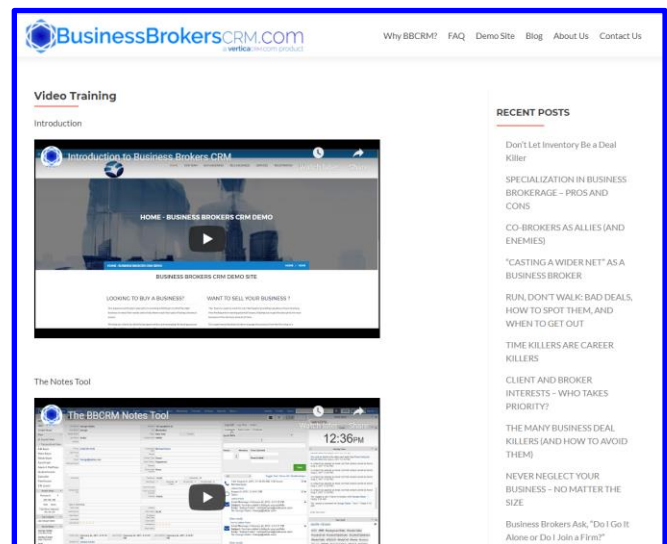
Brief Description:

Full Description:

Documentation and Videos

This redirects you to our site with all the video training modules.

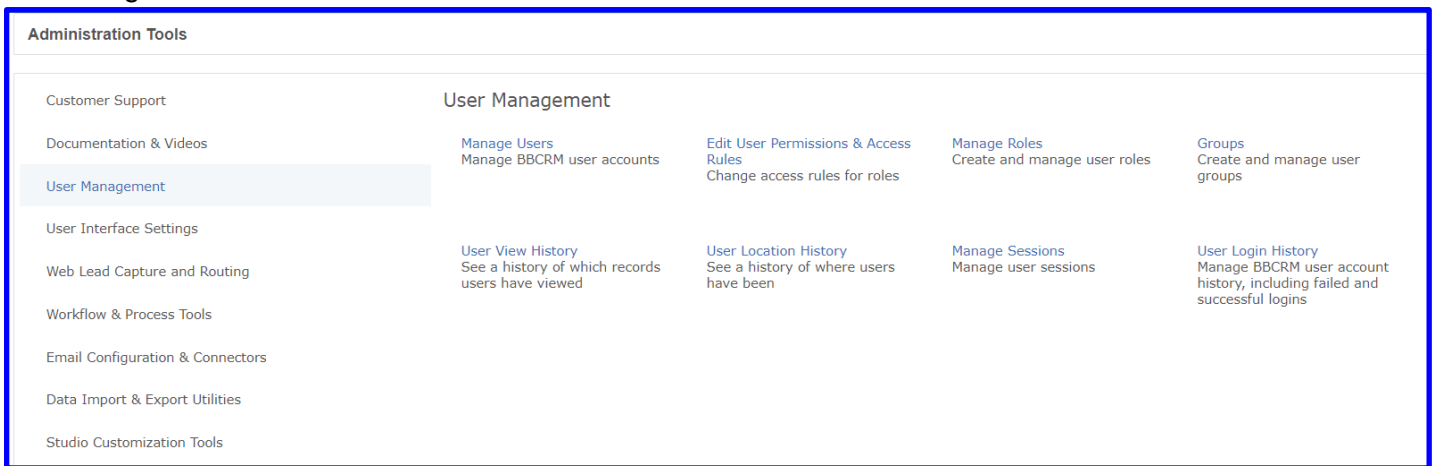
*You may decide to restrict certain tools to those that are not admins. If you decide to restrict the admin section nonetheless you can access this web page directly by going to the following link <https://businessbrokerscrm.com/video-training>.



User Management

Here you have many options to choose from.

See image :



Manage User - Manage BBCRM user accounts

Manage Rolls - Here you can create and manage user roles.

User View History - See a history of which records users have viewed.

User login History - Manage BBCRM user accounts history, including failed and successful logins.

Groups - Create and manage user groups.

User Location History- Track where your users have been.

Edit User Permissions -Change access rules for roles.

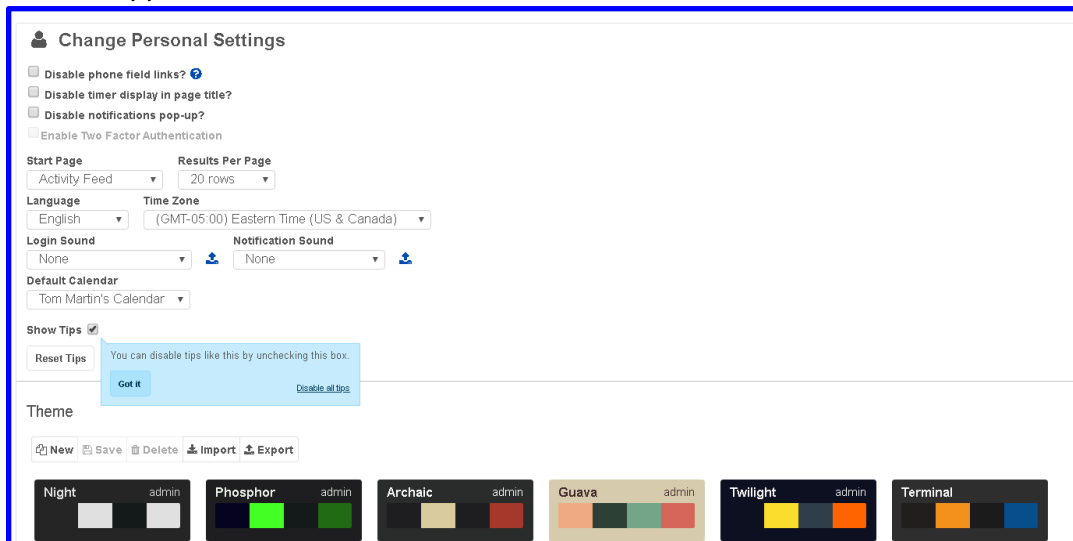
Manage Sessions - Manage user sessions

User Interface Settings

You can use your dashboard to change the settings and the interface of how you would like individual CRM to look.

To get to this, go over to the top right corner under your avatar picture and select preferences.

Here you can change anything you'd like and set things up to reflect on what you'd like your CRM to appear as.



Workflows and Process Tools

This is the core of the CRM, the workflows dictate how everything will function. You as the admin can set up the workflows according to your processes. This is what you will find when you open up this tab.

Workflow & Process Tools

Workflow

Program BBCRM with custom automation directives using a visual design interface

Manage Sales & Service Processes

Create and manage processes for Sales, Service, or Custom modules

Process Settings

Change advanced process settings

Workflow Settings

Workflow configuration options

Import Workflow

Import automation flows created using the Workflow design studio

Manage Notification Criteria

Manage which events will trigger user notifications

Email Configuration & 3rd Party Connectors

Here you can connect your emails and other third party platforms to the CRM. You can integrate with your email provider, Google, Twitter, Facebook and more.

Email Configuration & 3rd Party Connectors

Email Settings Configure BBCRM's email settings	Create Email Campaign Create an email marketing campaign	Manage Campaigns Manage your marketing campaigns
Email Capture Settings for the "email dropbox", which allows X2CRM to receive and record email	Convert Template Images Fix dead image links in email templates resulting from the 5.2/5.3 media module change	Google Integration Configure and enable Google integration
Twitter Integration Enter your Twitter app settings for Twitter widget	Jasper Server Integration Enter your Jasper Server settings for external reporting	

Data Import & Export Utilities

This is where you can come to quickly access all records for import/export. We have covered this in many of the previous sections.

Data Import & Export Utilities

Import Records Import records using a CSV template	Export Records Export records to a CSV file	Import All Data Import from a global export file
Export All Data Export all data (useful for making backups)	Tag Manager View a list of all used tags with options for deletion	Rollback Import Delete all records created by a previous import
Revert Merges Revert record merges which users have performed in the app	Mass Dedupe Tool View a list of all duplicates in the system and resolve them in bulk	Locate Missing Records View a list of all hidden records of a particular type in the system.

Studio Module Customization Tools

Here is a shortcut to create and modify your CRM . Here you can create all the modules you want to add to the top bar, to the dashboard and more.

Administration Tools

Customer Support

Documentation & Videos

User Management

User Interface Settings

Web Lead Capture and Routing

Workflow & Process Tools

Email Configuration & Connectors

Data Import & Export Utilities

Studio Customization Tools

Studio Module Customization Tools

- [Form Editor](#)
Drag and drop editor for forms
- [Manage Fields](#)
Customize fields for the modules
- [Dropdown Editor](#)
Manage dropdowns for custom fields

Activity Feed Settings

Activity Feed Settings

Event Deletion Time

Do not delete ▾

Set how long activity feed events should last before deletion.

Events build up quickly as they are triggered very often and it is highly recommended that some form of clean up is enabled. Default is 7 days.

Event Deletion Types

- Social Posts
- Comment
- Records Created
- Records Deleted
- Action Reminders
- Actions Completed
- Calendar Events
- Cases Escalated
- Emails Opened
- Emails Sent
- Notifications
- Webleads Created
- Web Activity
- Process Complete
- Process Reverted
- Process Started

Set which types of events will be deleted. Note that only events will be deleted and not the records themselves, except in the case of Social Posts, which are events.

This setting affects how long posts last on your Activity Feed,

This setting helps clean up your feed by automatically removing posts that have been their too long. This process does not delete the record of events, it simply unclutters the feed and keeps the posts count manageable for you.

How does it work?

- Set the amount of time an event will last in your feed before it is removed from the dropdown menu.

Event Deletion Time

Do not delete ▼

Set how long activity feed events should last before deletion.

You can choose how many days, 1, 7 or up to 30 days you may also set it to the default of **Do Not Delete**.

- Set which types of events this rule will apply to. Check off the items from the list. Please note, only the events in your activity feed will be deleted and the records themselves except in the case of social posts. Those are considered events. .

Email Configuration

This can become somewhat of a technical process. But here you can configure your email accounts. I. E Google and Gsuite to connect your emails and SMTP servers to the crm. Here you can also create your email templates and add your signature. This is very similar to doing it when you create a Gmail account.

Administration Tools

<p>Customer Support</p> <p>Documentation & Videos</p> <p>User Management</p> <p>User Interface Settings</p> <p>Web Lead Capture and Routing</p> <p>Workflow & Process Tools</p> <p style="background-color: #e0f0ff;">Email Configuration & Connectors</p> <p>Data Import & Export Utilities</p> <p>Studio Customization Tools</p>	<p>Email Configuration & 3rd Party Connectors</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%; vertical-align: top;"> <p>Email Settings Configure BBCRM's email settings</p> </td> <td style="width: 33%; vertical-align: top;"> <p>Create Email Campaign Create an email marketing campaign</p> </td> <td style="width: 33%; vertical-align: top;"> <p>Manage Campaigns Manage your marketing campaigns</p> </td> </tr> </table>	<p>Email Settings Configure BBCRM's email settings</p>	<p>Create Email Campaign Create an email marketing campaign</p>	<p>Manage Campaigns Manage your marketing campaigns</p>
<p>Email Settings Configure BBCRM's email settings</p>	<p>Create Email Campaign Create an email marketing campaign</p>	<p>Manage Campaigns Manage your marketing campaigns</p>		

Email Client Settings.

When configuring these settings, you have two options, the less technical one, and the more technical one!

- If you go to the dropdown, there is an option for **Sendmail and SMTP**. Sendmail requires no additional setup. The SMTP requires that you specify a hostname, port, security protocol and an authentication.

Method			
SMTP ▼			
Hostname	Port	Security	Authentication
104.131.164.199	25	None ▼	None ▼

- **Bulk Email Settings** - The **Send As** option brings up a dropdown menu allowing you to set the default sending address for bulk email. The ability to connect an external mail service such as Gmail, or Yahoo is available under **manage apps** within the profile menu set details.
- You can set who you are sending as when sending in bulk and the batch size along with how often. This is great for configuring your email blast settings.

Bulk Email Settings	
Configure how X2Engine sends email when mailing en-masse.	
Send As (when sending bulk email)	
buyer@cbs-global.com : "buyer@cbs-global.com" <... ▼	
Batch Size	Interval (Minutes)
200	60

- **Signature Settings** - Set how you want your signature to appear. Whether its a global signature or one you choose.

Email Signatures
User's Choice ▼

- **Notification Emails Settings** - Set how you want the notification emails to be sent. Choose from the dropdown of emails configured in your system.

Send As (when notifying users)

System default (legacy) ▼

- **Service Case Email Settings** -This is when a client submits a support request or ticket and you can set the emails to come as automated responses .

Send As (to service requesters)

System default (legacy) ▼

Sender Name	Sender Email Address
Tech Support	tech@verticacrm.com

Subject *

Tech Support

Email Message *

Hello {first} {last},

Just wanted to check in with you about the support case you created. It is number {case}. We will get back to you as soon as possible.

You can use the following variables in this template: {first}, {last}, {phone}, {email}, {description}, and {case}.

- **Web Lead Response Email Settings** - Configure how the CRM sends automated emails when sending to new web leads. You can set who the email is coming from and create an autoresponder based on this.
- **Workflow Email Settings** - Determine whether you want emails sent within the BBCRM workflow to respect the “do not email” settings.
- **Do Not Email Link** - This allows you to create the text for the email and add the link for unsubscribe in the body.. By placing “ **Place_OPP**” somewhere in the text will present the list of categories to unsubscribe from.

Don't forget to hit SAVE!

Connecting The CRM To Your Website

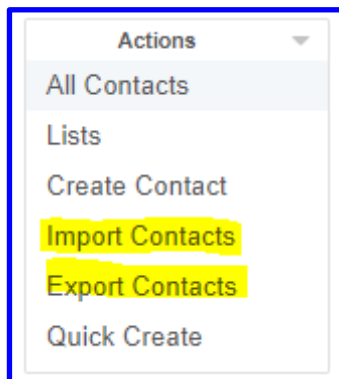
- The basic tools that are included in the website integration are as follows:
- Buyer registration form that leads to the online NDA with digital signature. The NDA is saved in the CRM and follows the process outlined in your demo.
- Contact forms from the sellers page and/or Contact Us page that created a lead or a Contact in the CRM.
- Business for sale search that is integrated not your listings module in the CRM.
- Active Listings automatically presented on your website.
- Featured listings section (usually displayed on the home page).
- Buyer login with username & password.
- Buyers Data Room.
- Buyers profile (the buyer can change their profile on your website and those changes will be saved on the buyer record in the CRM. This will enable you to better profile your buyers for marketing.)

- Brokers Profile on the Our Team page. This tool will display the brokers information on the website on their own page with all of their active listings featured.

Import And Export Data

In this section, we will show you how you can import and export your customer data.

Exporting Data



It's pretty simple and may seem counterintuitive but the best way to import your data is by first exporting the contacts or data, and then opening it up in a new .csv file. Clear the data from the fields and you are left with a template that can be used for all new data import/export.

How do you do this? Simple

Go to the buyers module, in the actions toolbox and hit export buyers, choose the default settings hit download, then hit okay on the popup, then hit the download button. Save the spreadsheet on your computer, open it up on the bar below and now you get a spreadsheet you can manipulate. Once done, you can create your template!

There are a few things you need to know about the template.

id	name	nameId	firstName	lastName	phone	email	address	city	state	zipcode	country	visibility	assignedT	lastUpdat	lastActivit	updatedB	leadSourc	createDat	expectedI	dealstatu	doNotCall	doNotEmi	trackingK	dupleChec	c_broker	c_busines
1	Joshua Factor	Joshua Fai	Joshua	Factor	2345542345	josh@verticacrm.com						Public	Anyone	April 18, 2	April 18, 2	vadmin		April 18, 2018, 3:25:03 PM			0	0	u8IDnTtkir	0	Joshua Fai	"Restaura
2	Test Lead	Test Lead	Test	Lead								Public	vadmin	May 31, 2	May 31, 2	vadmin	BizBuySe	June 22, 2018, 10:14:44 AM			0	0	Poslq491	1	Joshua Factor	
3	John Mahoney	John Mah	John	Mahoney	+61 019 202124	test@testing.cc	90 Canoe Melbourn NSW			8765	Australia	Public	vadmin	July 12, 20	July 16, 20	vadmin		July 12, 2018, 10:53:43 AM			0	0	uCukzq3H	1	Joshua Fai	"Absentee
4	Ben Rose	Ben Rose	Ben	Rose	2345542345	test@tester.coi	124 anywf East Bruns	New Jerse		8554	US	Public	vadmin	July 12, 20	July 12, 20	vadmin		July 12, 2018, 10:54:53 AM			0	0	kPrv5igyv	1	Joshua Factor	
5	Susan Flanders	Susan Flar	Susan	Flanders	+44 34343 56754	test@test.com	431 York S	London		10332	England	Public	vadmin	July 12, 20	July 12, 20	vadmin		July 12, 2018, 10:56:33 AM			0	0	EBwvMAxc	1	Joshua Factor	
436	Joshua Factor	Joshua Fai	Joshua	Factor	3039605890	josh123@verticacrm.com						Public	vadmin	February : February :	vadmin			February 11, 2020, 6:41:35 AM			0	0	f4a2eAcoj	0		
437	Jane Smith	Jane Smit	Jane	Smith	3039605890	joshsss@verticacrm.com						Public	vadmin	February : February :	vadmin			February 11, 2020, 6:42:55 AM			0	0	55gbR1hm	1		
438	James King	James Kin	James	King	6123601462	kimdodd@kinc.com						Public	vadmin	February : February :	vadmin			February 11, 2020, 6:43:23 AM			0	0	dZEMUJfji	0		

- Every record in the CRM has to have its own unique ID. You need to look at the highest number in the record module that you are importing, and start a sequence with a number higher than the highest number in the CRM I.E if you have 1000 records start the lowest record on the ID column with 1001.
- Every email in the system is unique. I.E if you have two records in the spreadsheet that have the same email address, than the system will import duplicates within one module. If it comes across a duplicate it will give a message in the report once the import is finished.
- Any field that is designated as the required field in the CRM than that field needs to be filled out in the spreadsheet. I.E if you are the field BROKER, if that is a required field, then you need to make sure you have a broker designated for each record in the CRM.
- Buyers need a password. In order to access the data room they need a password. You have the passwords here as well.
- Contact type. To make life easier in the future make sure the contact type field is filled out correctly.
- The same goes for buyer status. Any person who has a status of registered can log in with user and password (if they have a password) See above!
- Somebody with status of “Unregistered” will not have access to their data room. (until you change the parameters from unregistered to registered)

Importing Data

Once you have done your data manipulation, head back over to your friend the actions toolbox and click on import data. You will be promoted to the “import from contacts template” tool once there, choose the .csv file. (Only .csv files can be imported) If you have a previous saved map, you can choose that as well as a .Json file. This saves you time so you don't need to remap. Choose that file as well and hit SUBMIT!

Your Field	Our Field	Sample Record [Prev] [Next]
ID	ID	200
Phone Number	Phone	(916) 722-0283
Status	DO NOT MAP	Active
Name	Full Name	Sam's Liquor Citrus Sacramento County
DBA Name	DO NOT MAP	Sam's Liquor Citrus Sacramento County
Generic Name	DO NOT MAP	Well Established Liquor Store Sacramento County Liquor Store for Sale Details: * This is an established liquor store for sale in Sacramento County. * This liquor store is situated on Freeway no other competition nearby. * 1500 Sqft Building Size, Approximate. * The store sells general convenience store items, liquor, beer & wine, EBT, phone cards, Atm. * Store gross sales recently have been up to \$40,000 per month average estimated with good profit margin is 30%, as per owner (broker has not verified this gross sales number so buyer should
Description	DO NOT MAP	

When you hit that button, the CRM is then going to present to you the import map with the fields in that file in the spreadsheet from the “Your Field” column will be a representation of the cell of row 1 in the column header of the spreadsheet. In the “Our Field” column, you have a series of dropdown menus. These correspond with the cells in the data of the spreadsheet.

You have the option to create a new field and not map it that is most appropriate to you.

The third column is just an example of what that data will look like.

It is recommended to export your mapping as well. In case you will be doing another import in the future.

Hit process import and BOOM Baby you're done!

Contacts Import

First, we'll need to make sure your fields have mapped properly for import. Below is a list of our fields, the fields you provided, and a few sample records that you are importing.

If the ID field is selected to be imported, the import tool will attempt to overwrite pre-existing records with that ID. Do not map the ID field if you don't want this to happen. Select the fields you wish to map. Fields that have been detected as matching an existing field have been selected.

Fields that are not selected will not be mapped. To override a mapping, select the appropriate field from the corresponding drop down.

Selecting "DO NOT MAP" will ignore the field from your CSV, and selecting "CREATE NEW FIELD" will generate a new text field within X2 and map your field to it.

Import Status

Import setup completed successfully. Beginning import.

35 Contacts have been successfully imported.

[Import more Contacts](#) [Import to another module](#) [Rollback Import](#)

crm.emesttravel.com says

Import Complete!

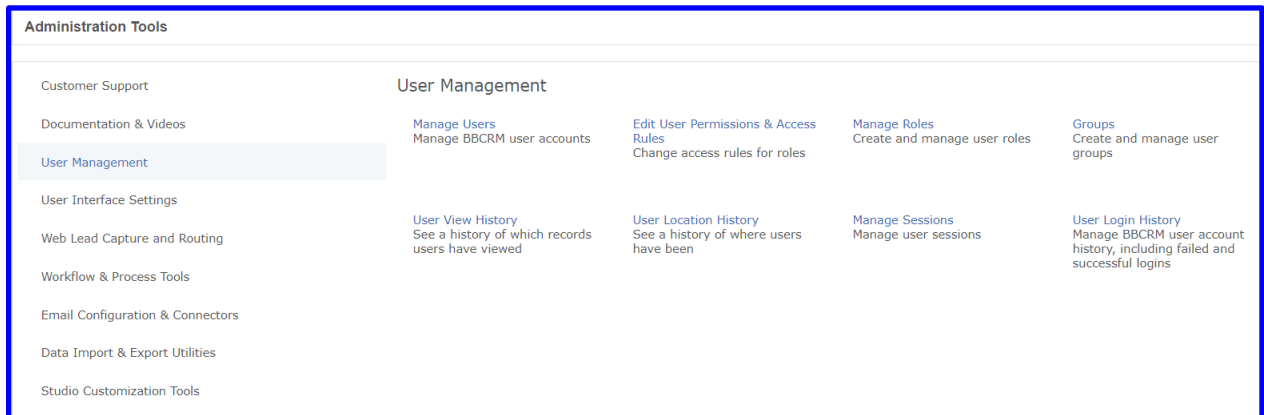
OK

If you had duplicates, or other inconsistencies the system will give you the opportunity to fix them at a later time.

This is why you were smart and you saved the mappings and listened to us when said it was highly recommended, thus saving you time.

Groups

In this section we go over the groups widget. Groups are a great way to manage roles and segment users.



Within the user management tools you have a number of different functions one of which is user groups.

You can have multiple groups within your system.

Once you have the groups set up based on your company and team members, then you go to the "Roles and Rules" section.

Here you can assign each group what they have the ability to see on their module to module level.

I.E if you have a member of the "brokers" group, and you go to the contacts line, you have the option of checking off the view checkbox and have the option to assign them to view all records or only those assigned to them.

The same goes for creating, updating and deleting in that same module!

If you check off admin, in this particular module, all people with admin control will have access to everything in that particular module.

When you are finished, click save at the bottom!

Manage Roles

Once you have hit save you go back out to the manage roles section.

You have four options

- Add a role
- Delete a role
- Edit a role
- Add an exception

Add Role - Self explanatory

Delete Role- Self explanatory

Edit Role- Start by clicking on that button, the tool will open up, select a role from the dropdown menu, choose what you want, than you have multiple different options.

Click on one of the options. In the Action Tool Box you have 5 options

- Group list
- Create Group
- Edit Group
- Delete Group

Click on the edit group. You will have a screen that looks like this: **See Below**

Name *

Sales Team

Users

13 items selected	<u>Remove all</u>	<input type="text"/>	<u>Add all</u>
↕ Darren Harrington	-	API User	+
↕ Gary VanSistine	-	Bob Wolter	+
↕ Glen Herman	-	Josh Phillips	+
↕ John Foster	-	Vertica CRM	+
↕ Karen Marchant	-		
↕ Mary Lou VanDeusen	-		
↕ Mary VandenAvond	-		
↕ Michael Garsow	-		

Save

You can add and remove permissions to users within this group.
Once you make your changes, hit save!

The Activity Feed

The activity feed is a pretty cool feature within the BBCRM. It is an intra company timeline that's displayed on the dashboard as soon as you log in. It's displayed in the far right column when you access other modules. The activity feed acts as your hub for all activities your users or workflows have completed. It's composed of notifications, social posts, and location check-ins.

Activity Feed Contents

- Dashboard
- Widgets
- Activity Feed Module

The screenshot displays the BBCRM user interface. On the left is a sidebar with a 'Profile' dropdown showing 'Vertica CRM' and options for 'Show Widget', 'Create Widget', and 'Edit Layout'. Below this are 'Filter Controls' with 'Simple' and 'Full' tabs, and a list of 'Event Types' including 'All', 'Actions Completed', 'Action Reminders', 'Calendar Events', 'Doc Updates', 'Emails Opened', 'Emails Sent', 'Social Posts', 'Records Created', 'Records Deleted', 'Topic Replies', 'Process Complete', 'Process Reverted', and 'Process Started'. The main content area is divided into two sections. The top section is 'Task Manager', which shows a table with columns for 'Action Description', 'Association Name', 'Assigned To', 'Completed By', and 'Create Date', but contains the message 'No results found.'. The bottom section is the 'Activity Feed', which features a search bar and a date separator for 'Thursday, February 13, 2020'. It lists three activity items: 1) 'Mary VandenAvond posted a comment on Ken Lam: John/Ryan - inquiry 2/13/20 on [Read More] 2 days ago' with icons for comment, info, pin, like, and share. 2) 'Mary VandenAvond created a new contact, Ken Lam 2 days ago' with a contact icon and the same set of interaction icons. 3) 'Mary VandenAvond posted a comment on Sean Quinn: Bob/Gary - inquiry 7/26/17 on 1 [Read More] 2 days ago' with the same set of interaction icons. A fourth item is partially visible at the bottom: 'Mary VandenAvond posted a comment on Joseph Schnikten: 12/18/18 rec'd CA- [Read More] 2 days ago'.

Your activity feed is displayed once you log in to the CRM. Just like the other widgets you can modify it and move it around by dragging and dropping.

You can also filter out different tasks using the filters on the right hand side column.

In the activity feed you see all tasks and workflows. Many workflows have the option to automatically post updates or completion to your workflow automations on the activity feed.

We will discuss more in workflows.

Activity Feed Module

The screenshot displays the Activity Feed Module interface. On the left, there is a sidebar with a 'Favorites' section and a 'Recent Items' dropdown menu. The 'Recent Items' menu is expanded, showing a list of items with the following details: Group: Sales Team, Workflow: 1 - Buyer Registration, Process: Buyer, Jason Hanson (489) 807-8448, Mike Garsow, and Workflow: 1 - Valuation - Initial. The main area is titled 'Activity Feed' and contains a text input field with the placeholder 'Enter text here...'. Below the input field, the date 'Thursday, February 13, 2020' is displayed. The activity feed shows several entries, each with a play button icon, a timestamp of '2 days ago', and a set of interaction icons (comment, share, like, dislike, and mute). The entries include: Mary VandenAvond posted a comment on Ken Lam: John/Ryan – inquiry 2/13/20on [Read More]; Mary VandenAvond created a new contact, Ken Lam; Mary VandenAvond posted a comment on Sean Quinn: Bob/Gary - inquiry 7/26/17 on 1 [Read More]; Mary VandenAvond posted a comment on Joseph Schnikten: 12/18/18 rec'd CA - [Read More]; Mary VandenAvond deleted the action, CA_-_Rockwell,_Jason_-_1.6.20(1).pdf:....; and Sarah Breitreiter deleted the contact, Keith K..

- The activity feed is also visible within its own **Module** named “Activity”
 - Within the activity module, you can see a full screen view of all the same activity notifications that would normally appear within the dashboard.
 - Like the dashboard, the activity module has a full set of **Filters** that helps you navigate the activity feed. This shows only specific updates meeting the specific criteria. The filters are on the right hand column and are triggered by clicking on the funnel icon on the top of the page.
 - You can set the view to public or **private**. You can choose which users can view the feed. You can choose which options to show and what social subtypes to display. All of those options are chosen via the drop down menus next to each setting. Once selected click on **Apply filters** to activate. You can **Unselect All** and this will set all filters to off.
 - **Create Report** allows you to create a report based on the filters you have applied. You may give the report a name and choose a date range for the report! This will setup a report which will be emailed to you periodically.
-

The Process Tool

Now we enter the section on the process tool. This is one of the most important tools in your arsenal. It helps your sales team keep track of each stage in the sales funnel. Here we will discuss and breakdown the process workflows.

Process Contents

- **List view - All Processes**
- **Create Process**

- **Process Detail View**

To get started with the process tool, you'll be able to find it on the menu bar as a module know as **Process**. Clicking on that brings you to a screen that looks like this : **see below**

Name	Default For	Stages
Buyer		6
Listing	Listings	8
Address Release	Data Room	3
Seller	Sellers	5
Deals		5
Valuation	Services	5

You will see the different processes. You can see them in different views. By clicking on the process i.e. **Buyer** it will take you to a screen that looks like this.

Process: Buyer

Add a Deal

```

graph LR
    A[Unregistered 0 deals] --> B[Null Broker 0 deals]
    B --> C[Registered 2 deals]
    C --> D[Due Dilligence 0 deals]
    D --> E[Contract 0 deals]
  
```

No results found. No results found. Jason Hanson Antony Landsman No results found. No results found.

This is known as pipeline view. Here you can see each stage of where the buyer is holding in the sales process. It is part of the detailed view. You can also see in funnel view.

Process: Buyer ▼

Process Status

Stage Start Date:

Start Date	End Date	Date Range
January 15, 2020	Today	Custom ▼

Record Type

▼
Contacts

User

▼
All

Go

Unregistered		0			
Null Broker		0			
Registered		2			
Due Dilligence		0			
Contract		0			
Closing		1			

Total Records: 3

#	Stage Name	Required Stages	Require Comment?	Conversion Rate
1	Unregistered	No	No	
2	Null Broker	No	No	
3	Registered	No	No	
4	Due Dilligence	No	No	
5	Contract	No	No	
6	Closing	No	No	

Create Process

To create a new process in your CRM it's simple. Head on over to the actions toolbox and click on **create**. You get taken to a page that looks like this:

Create Process

Process Name *

Default Process ▼ Show Financial Data

1	Stage Name	Required Stages	Roles	Require Comment?
	<input style="width: 80%;" type="text"/>	None ▼	<div style="display: flex; flex-direction: column; gap: 5px;"> Anyone Master Broker Staff </div>	No ▼

[Add]

First Stage Color:

▼

Last Stage Color:

▼

Create

- To Create a new process enter a name, enter the process stages. 1 is the minimum amount. To create additional stages click the blue [ADD] link near the bottom of the workflow window.
- For each process stage, enter the information fields for name, prerequisite stages, rol assignments and whether comments are available
- Click on the **X** icon in the top right corner of each process stage to delete it Additionally, stages can be reordered via drag and drop.
- Decide whether to set this process as default for which modules by clicking the box near the top of the page.

You can edit a process by clicking on **Edit Process** This lets you choose the permissions for each person. If you make a change in this section, it will automatically reflect in the process

Update: Buyer

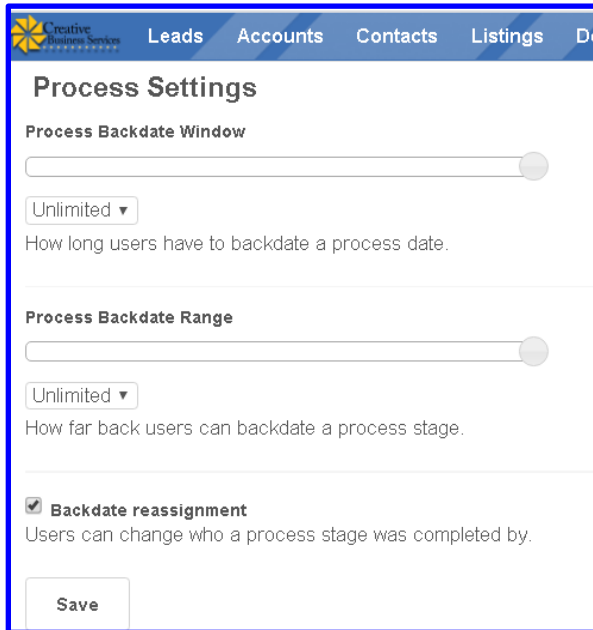
Process Name * Default Process Show Financial Data

Select options ▼

	Stage Name	Required Stages	Roles	Require Comment?
1	<input type="text" value="Unregistered"/>	<input type="text" value="None"/>	<div style="border: 1px solid #ccc; padding: 2px;"> Anyone Master Broker Staff </div>	<input type="text" value="No"/>
2	<input type="text" value="Null Broker"/>	<input type="text" value="None"/>	<div style="border: 1px solid #ccc; padding: 2px;"> Anyone Master Broker Staff </div>	<input type="text" value="No"/>
3	<input type="text" value="Registered"/>	<input type="text" value="None"/>	<div style="border: 1px solid #ccc; padding: 2px;"> Anyone Master Broker Staff </div>	<input type="text" value="No"/>
4	<input type="text" value="Due Dilligence"/>	<input type="text" value="None"/>	<div style="border: 1px solid #ccc; padding: 2px;"> Anyone Master Broker Staff </div>	<input type="text" value="No"/>
5	<input type="text" value="Contract"/>	<input type="text" value="None"/>	<div style="border: 1px solid #ccc; padding: 2px;"> Anyone Master Broker </div>	<input type="text" value="No"/>

view.

Workflow and Process Tools



This is a section where you can set the permissions for modifying processes within a certain time frame.

To get to this setting, open up the **workflows and process tools** tab under the admin section.

It will look like this:

You have two sliding menus. **Process Backdate Window** and **Process Backdate Range**.

- The Process Backdate Window, is the amount of time after the creation of a process that users have to backdate the process. Backdating is creating and completing process stages on dates that are earlier than the current

one.

- The Process Backdate Range, is the range of time that users are able to backdate processes within. This screen shows a process backdate range of one year.
- Therefore, a user can go to the process and create or complete a stage up to one year prior to the time that they are editing it.

Manage Notification Criteria

The screenshot shows the 'Manage Notification Criteria' page in a CRM system. At the top, there is a navigation bar with tabs for Leads, Accounts, Contacts, Listings, Deals, Agents, Marketing, and More. On the right, there are links for Admin, Profile, and Users, along with a search bar. The main content area is titled 'Manage Notification Criteria' and contains a table with columns for 'Condition' and 'Delete'. Below the table, there is a section titled 'Add Criteria for Notifications' with a 'Create' button. The form includes fields for Model Type, Model Field, Comparison Operator, Model Value, Users (a dropdown menu), and Type.

Manage Notification Criteria

Condition | Delete

No results found.

Add Criteria for Notifications

To add a condition which will trigger notifications, please fill out the form below.

*Fields with * are required.*

Model Type
Select a model ▼

Model Field
Select a model first ▼

Comparison Operator
Select a comparison operator. ▼

Model Value

Users
Michael Garsow
Michael Schwantes
Mike Van
Ryan Pankratz
Sarah Breitreiter
Tom Martin
Vertica CRM

Type
Notification ▼

- The **Manage Notification Criteria** option will bring you to a system that creates filters for notifications. Here you can set triggers for notifying your users of certain events.
- The model type that you select will choose the module that supplies the data for the trigger events. Choose a field type from within the model from the dropdown menu.
- The comparison operator and model value fields allow you to choose how you'd like to elevate the data in that field
- Choose users to notify from the drop down menu.
- Select notification type. You can create an action for the user, change the assignment of the record to the specified user or simply send them a basic notification with the crm.
- View already created event filters at the top. You can see the condition.

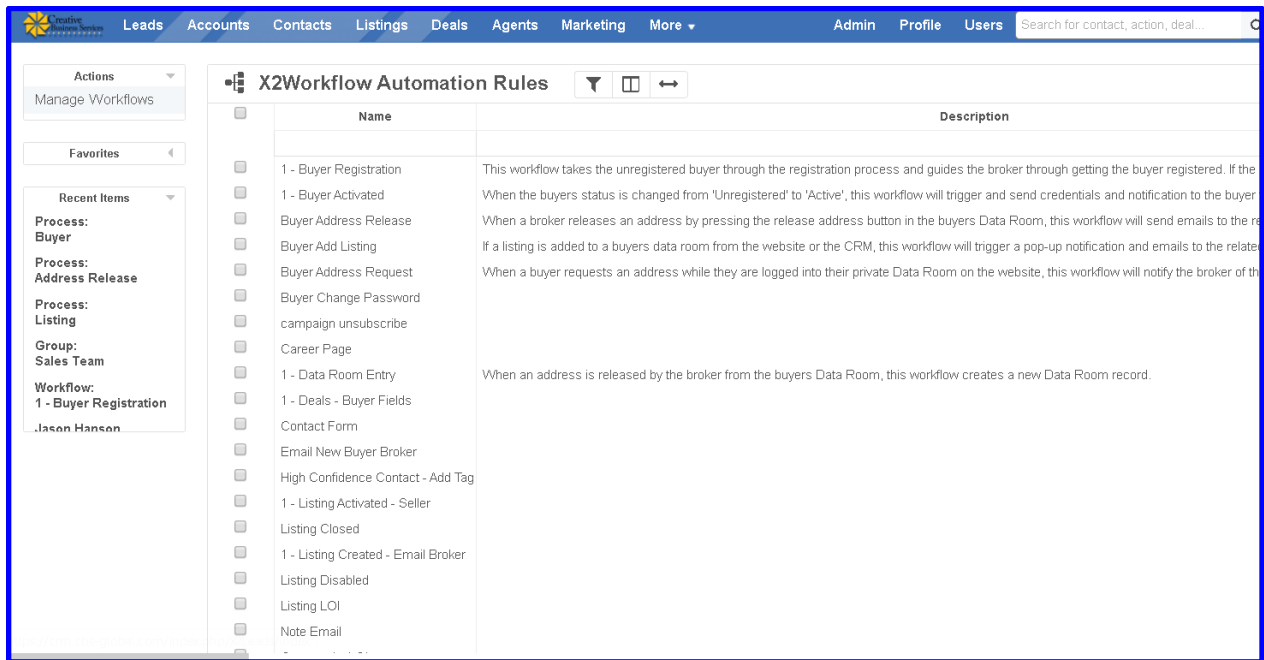
Workflows

This is the part we've all been waiting for. Workflow automation rules! Here you can create custom workflows to automate everything within the CRM. Each action can have a custom created workflow. Here we will go over each action of your CRM, and show you how to map it in the workflows creator. We will also discuss the actions bank and creating custom workflows.

Creating Workflows

To access the workflows area, go into the admin dashboard, and click on workflows.

You will be taken to a screen that looks like this :



Here you have three columns.

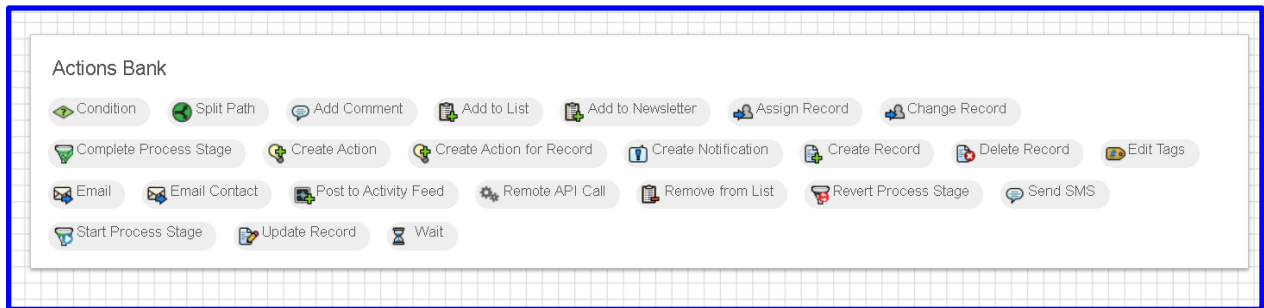
- A check box
- Name of Action
- Description

We will be going through each action, discussing briefly what it does and showing you how to create that custom workflow.

The Actions Bank

Before we dive into each action workflow we need to discuss the actions bank. This is your tool box for creating custom automation rules.

The Actions Bank looks like this.



The actions are as follows:

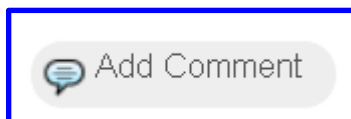
- **Condition-** this lets you add a condition to your workflow. I.E when a record is created you can choose **Yes** or **No** if no, it will assign a record, if yes you can choose to start the funnel process.



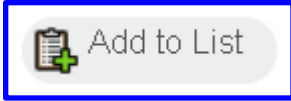
- **Split Path-** This splits the path in which the action is taken It works similar to the conditions. The icon looks like this.



- **Add Comment-** you can insert this into your workflow if you want to add a comment into the workflow.



- **Add To List-** add this into the workflow if you want create an automation for adding new buyers to your email list.



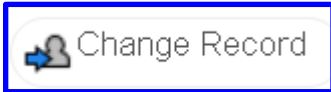
- **Add To Newsletter**- This lets you set the workflow to automatically insert into newsletter.



- **Assign Record**- This assigns record to user.



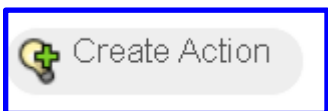
- **Change Record**-This sets the rule to change records from users.



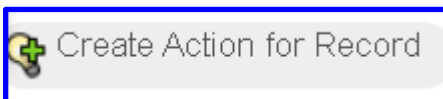
- **Create Process Stage**- This is added when the process is complete



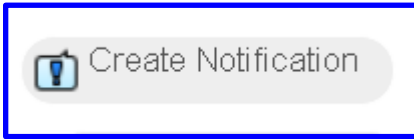
- **Create Action**- This is added when you want to create an new action within the workflow.



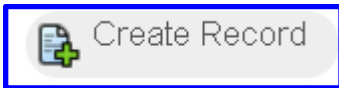
- **Create Action For Record** - Creates an action for record.



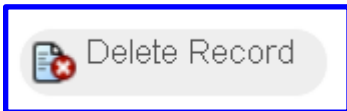
- **Create Notification** - Set this to trigger a notification that you have created within your workflow.



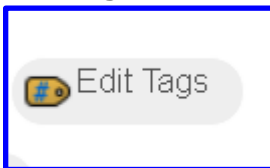
- **Create Record** - This adds a trigger to the workflow that creates a record.



- **Delete Record**- Deletes record within the workflow



- **Edit Tags**- This enables you to set the workflow to edit tags you've created.



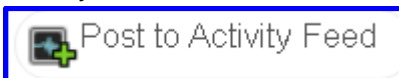
- **Email**- Sends an email to a user once record has been updated.



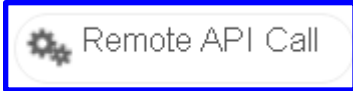
- **Email Contact**- You can set this to email clients once an action has been taken I.E a buyer has been added to the system. This will trigger an auto response email.



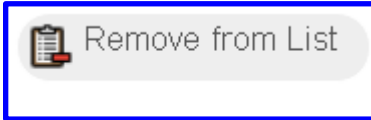
- **Post To Activity Feed** - Use this to set up and automate processes that you want to post to the activity feed. I.E after a notification has been created, have it post to the activity feed.



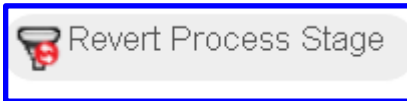
- **Remote API Call**- trigger a remote API call from within the system.



- **Remove From List** - Set trigger to remove a buyer from a list after a given action is taken.



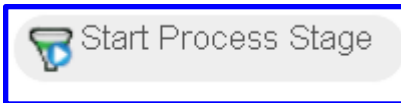
- **Revert Process Stage** - This reverts the process stage. Add it as a trigger after an action that you would want to revert back to the original process.



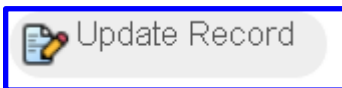
- **SMS**- Set a trigger to send a text message to buyers when the trigger a specific stage in the workflow.



- **Start Process Stage** - This is added in the workflow when you initiate a process.



- **Update Record** - This automatically updates the records as part of your custom workflow.



- **Wait**- Add this to the workflow after you have created an action. This create a pause and send to the next action.



Your Custom Workflows

Now that we went over each action in the action bank, we'll be discussing your custom workflows.

Contents

- **Contact Registration**
- **Buyer Activated**
- **Buyer Address Release**
- **Buyer Add Listing**
- **Buyer Address Request**
- **Buyer Change Password**
- **Campaign Unsubscribe**
- **Data Room Entry**
- **Deals- Buyer Fields**
- **Contact Form**
- **Email New Buyer Broker**
- **High Confidence Contact- Add Tag**
- **Listing Activate- Seller**
- **Listing Closed**
- **Listing Created-Email Broker**

- Listing Disabled
 - Listing LOI
 - Listing Expiration Notification
 - Seller/Buyer Drip Campaign
 - Opportunity LOI
 - Overdue Action
 - Release Address Update Record
 - Seller Lead
 - Seller Lead Assigned
 - Null Broker
 - Listing- Contract Signed
 - Seller Drip Campaign
-

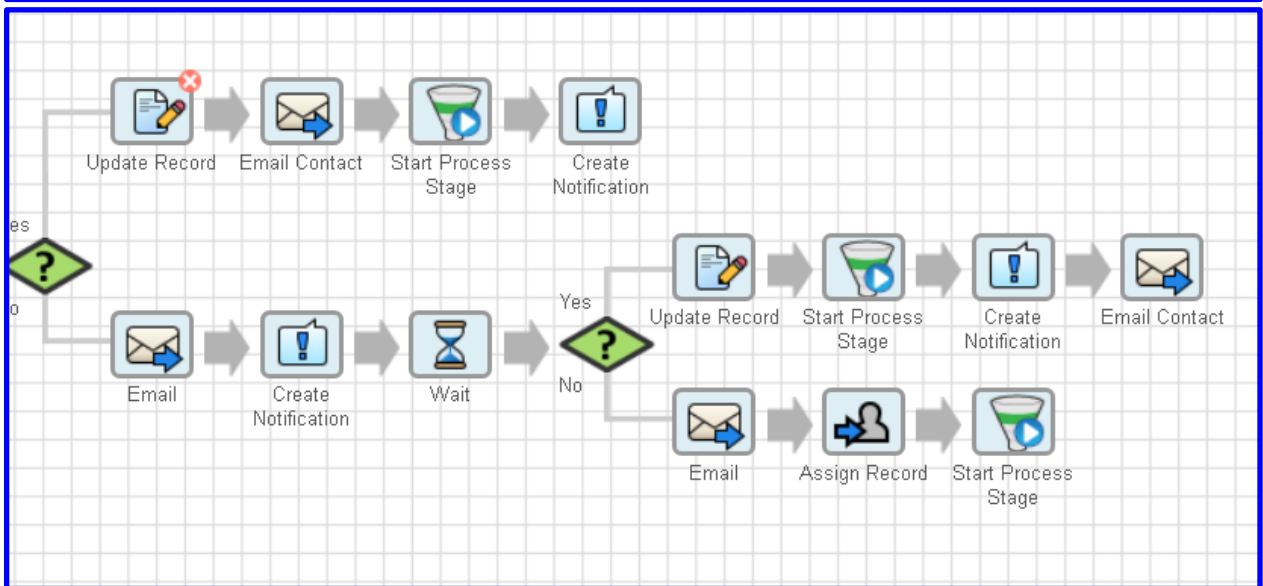
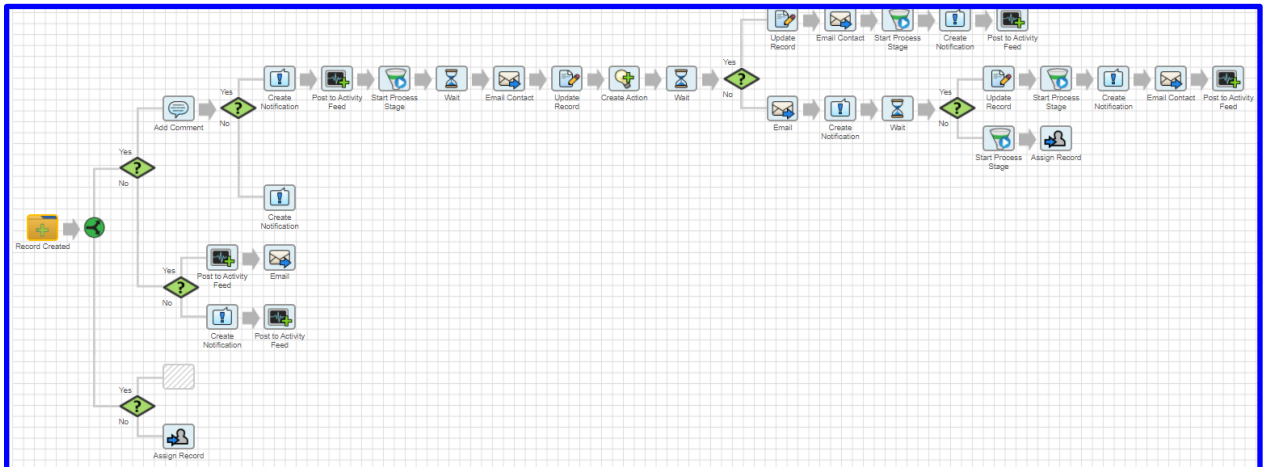
Contact Registration

This workflow takes the new contacts through the process of being initiated in the system. This works both for buyer contacts and seller contacts. If it is a buyer than it mo

*The trigger is **Record Created** The Status is Not Active. You can set the status by using the dropdown that looks like this:*



A screenshot of a dropdown menu. The word "Active" is displayed above the dropdown box. Inside the dropdown box, the word "No" is visible next to a downward-pointing arrow. The entire dropdown menu is enclosed in a blue rectangular border.



Buyer Activated

When the buyers status is changed from 'Unregistered' to 'Active', this workflow will trigger and send credentials and notification to the buyer telling them to log into their personal Data Room.

This is triggered when someone updates a record of the specified type.

Record Type
 Contacts

Buyer Status equals Registered

Buyer Status changed

Compare Attribute Add Condition

This is the workflow.

Trigger Record Updated Active Yes

Name 1 - Buyer Activated

Description When the buyers status is changed from 'Unregistered' to 'Active', this workflow will trigger and send credentials and notification to the buyer telling them to log into their personal Data Room

Actions Bank

- Condition
- Split Path
- Add Comment
- Add to List
- Add to Newsletter
- Assign Record
- Change Record
- Complete Process Stage
- Create Action
- Create Action for Record
- Create Notification
- Create Record
- Delete Record
- Edit Tags
- Email
- Email Contact
- Post to Activity Feed
- Remote API Call
- Remove from List
- Revert Process Stage
- Send SMS
- Start Process Stage
- Update Record
- Wait

Record Updated → Complete Process Stage → Start Process Stage → Create Notification → Email Contact

Spec Release

When a broker releases an address by pressing the release address button in the buyers Data Room, this workflow will send emails to the representing brokers, create an activity feedentry, a pop-up, and create an action for the broker to follow up with the buyer.

*The trigger is **Record Updated and is active.***

The image shows a workflow diagram and its configuration. The workflow consists of the following steps: Record Updated (trigger), Update Record, Create Notification, Post to Activity Feed, Email, Create Action for Record, Wait, and a decision diamond. The 'Yes' path from the diamond leads to 'Create Notification', and the 'No' path leads to a shaded box. Below the diagram is the configuration for the 'Record Updated' trigger.

Record Updated
Triggered when some updates a record of the the specified type.

Record Type
Data Room

Release Status | changed

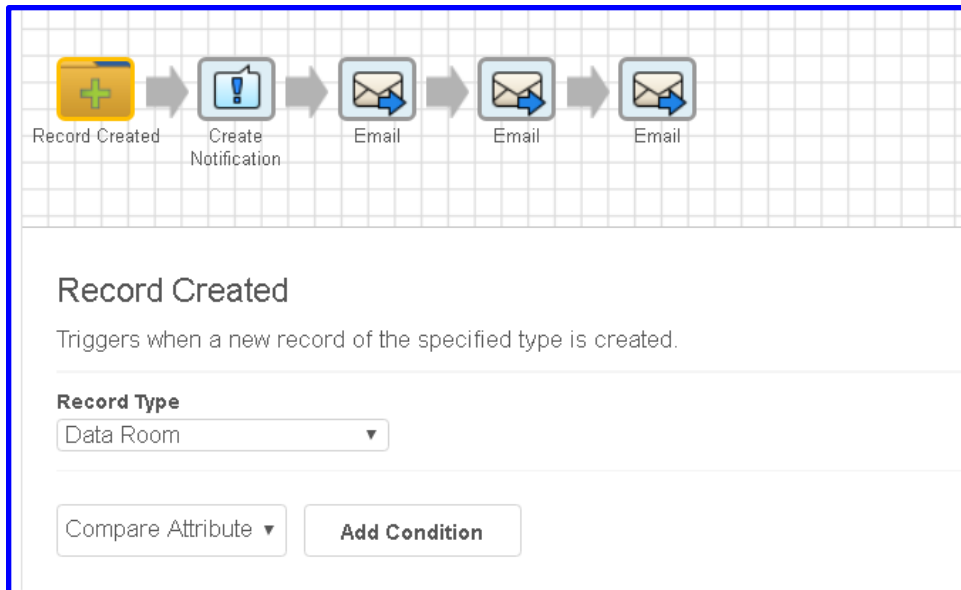
Release Status | equals | Released

Compare Attribute | Add Condition

Buyer Add Listing

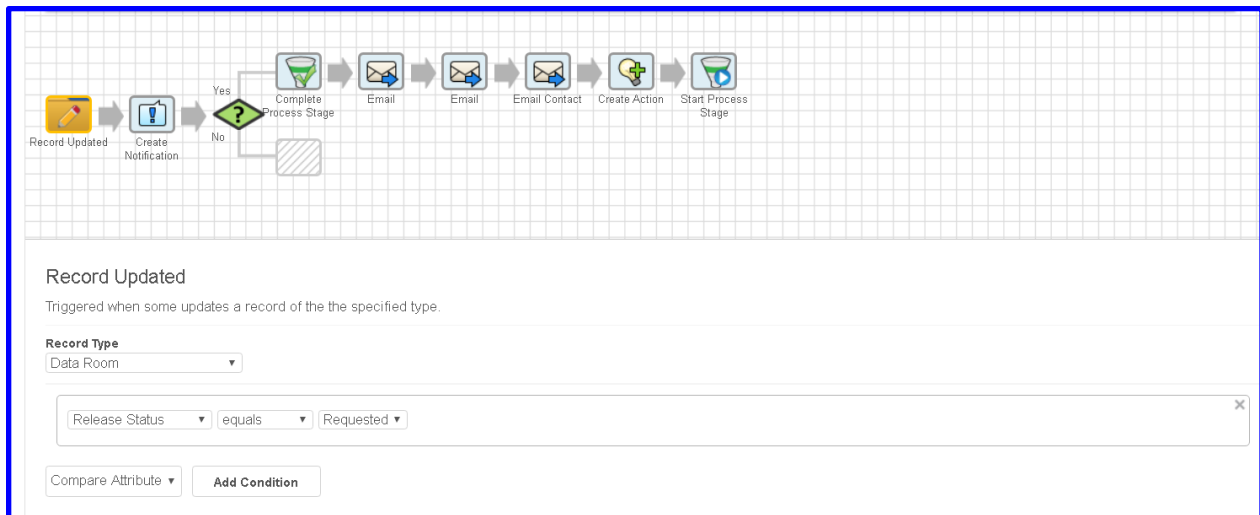
If a listing is added to a buyers data room from the website or the CRM, this workflow will trigger a pop-up notification and emails to the related parties.

This is triggered when a record is created.



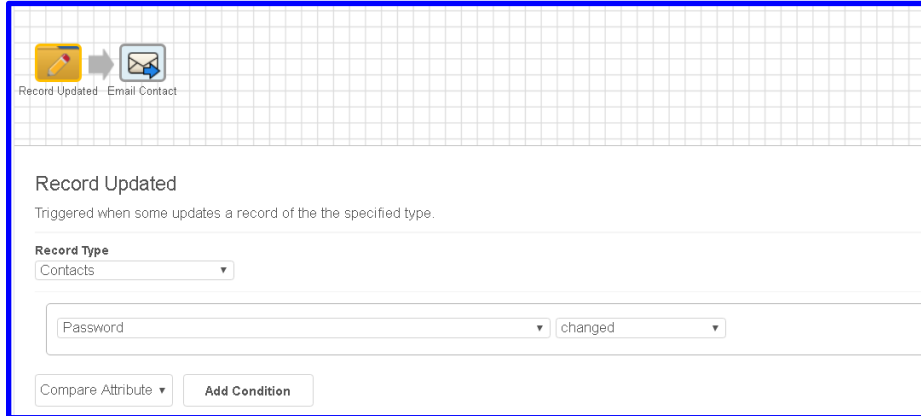
Buyer Address Request

When a buyer presses the “Request Address” button while they are logged into their private Data Room on the website, this workflow will notify the broker of the request, and send emails to the buyer, buyer’s broker and listing broker of the request.



Buyer Change Password

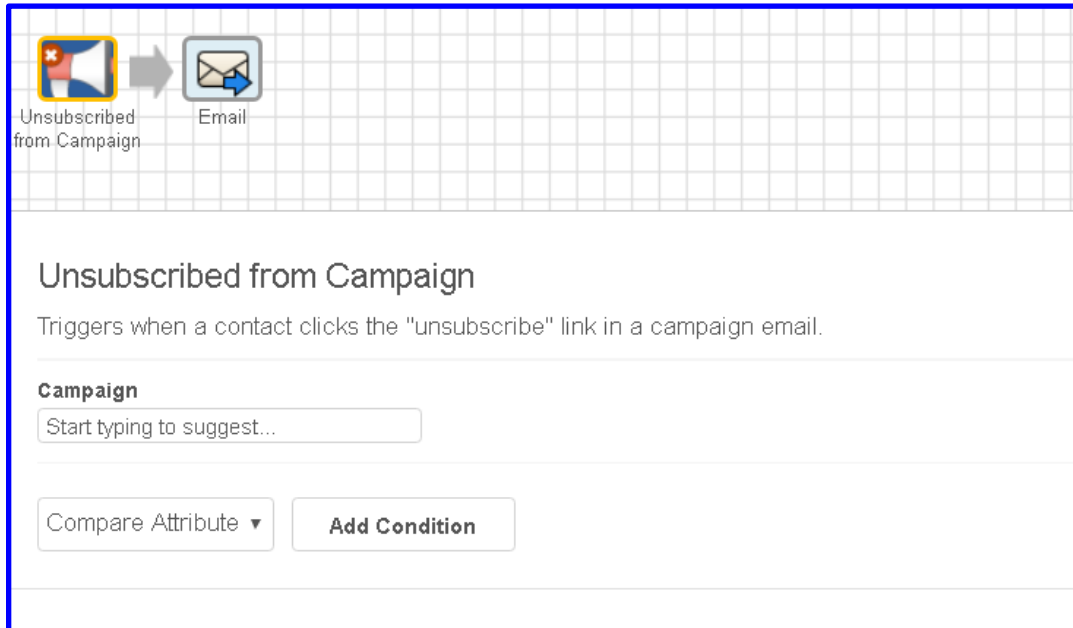
This is pretty self-explanatory. When a buyer wants to change his password, the record will be updated and the CRM will send an automated email out with the new password change.



The screenshot shows a configuration interface for an automation rule. At the top, there are two icons: a yellow square with a pencil and a blue envelope with an arrow, connected by a grey arrow pointing right. Below the icons are the labels 'Record Updated' and 'Email Contact'. The main title of the rule is 'Record Updated', followed by the description 'Triggered when some updates a record of the the specified type.'. Underneath, there is a section for 'Record Type' with a dropdown menu currently set to 'Contacts'. Below that, there are two more dropdown menus: the first is labeled 'Password' and the second is labeled 'changed'. At the bottom of the configuration area, there are two buttons: 'Compare Attribute' with a dropdown arrow and 'Add Condition'.

Campaign Unsubscribe

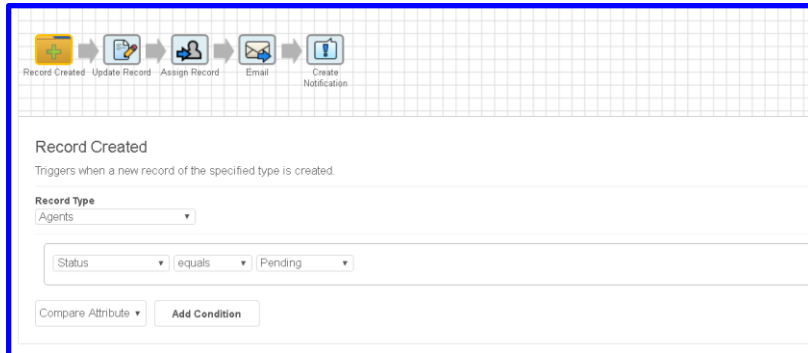
This triggers when a contact clicks the "Unsubscribe" link in a campaign email from their an email confirmation will send.



The screenshot shows a configuration interface for an automation rule. At the top, there are two icons: a blue square with a white envelope and a red plus sign, connected by a grey arrow pointing right. Below the icons are the labels 'Unsubscribed from Campaign' and 'Email'. The main title of the rule is 'Unsubscribed from Campaign', followed by the description 'Triggers when a contact clicks the "unsubscribe" link in a campaign email.'. Underneath, there is a section for 'Campaign' with a text input field containing the placeholder text 'Start typing to suggest...'. At the bottom of the configuration area, there are two buttons: 'Compare Attribute' with a dropdown arrow and 'Add Condition'.

Career Page

*This triggers when a new record of the specified type is created
Here it is **Agents**.*

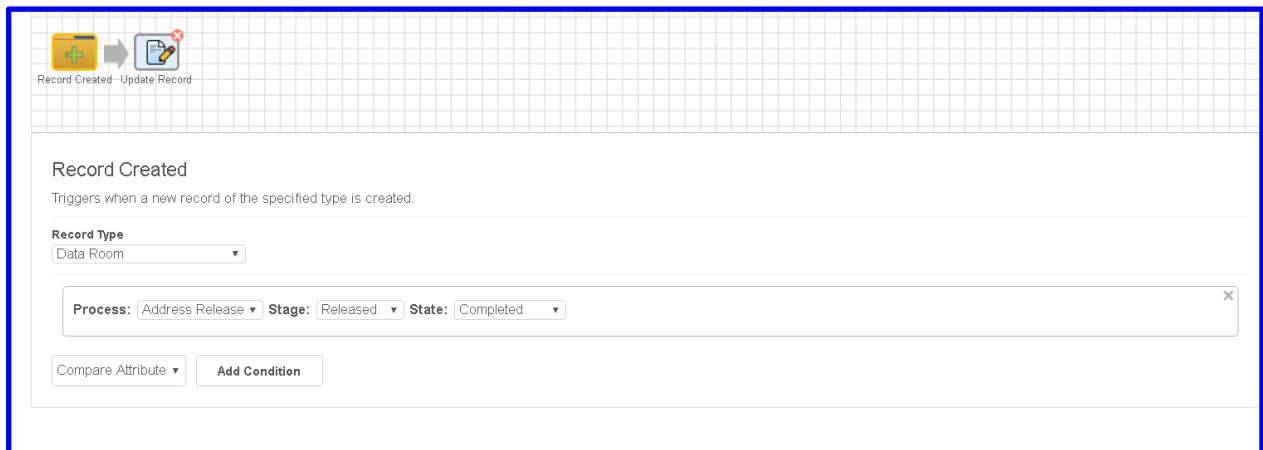


The screenshot shows a workflow configuration interface on a grid background. At the top, a sequence of five steps is shown: Record Created, Update Record, Assign Record, Email, and Create Notification. Below this, the 'Record Created' trigger is configured with the following settings:

- Record Type: Agents
- Status: equals Pending
- Buttons: Compare Attribute, Add Condition

Data Room Entry

When an address is released by the broker from the buyers Data Room, this workflow creates a new Data Room record.




The screenshot shows a workflow configuration interface on a grid background. At the top, a sequence of two steps is shown: Record Created and Update Record. Below this, the 'Record Created' trigger is configured with the following settings:

- Record Type: Data Room
- Process: Address Release
- Stage: Released
- State: Completed
- Buttons: Compare Attribute, Add Condition

Deals- Buyer Fields

*This triggers when someone updates a record of the specified type.
Here we are working with **deals**.*



Record Updated - Update Record

Record Updated

Triggered when some updates a record of the the specified type.


Record Type
 Deals ▾

Buyer Name ▾ changed ▾

Compare Attribute ▾ **Add Condition**

Contact Form

*This triggers when a new contact fills out your web lead capture form.
 The system creates a new record.*



New Web Lead - Create Record

New Web Lead

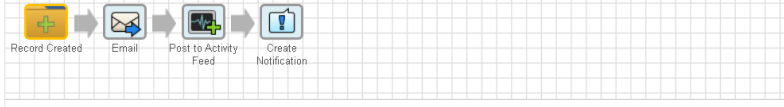
Triggers when a new contact fills out your web lead capture form.

Tags (optional)
 equals ▾ contactlead

Compare Attribute ▾ **Add Condition**

Email New Buyer- Broker

This will trigger when a new record is created. It will send an email to the buyer, post to the activity feed that this was done and set a notification.



Record Created → Email → Post to Activity Feed → Create Notification

Record Created
Triggers when a new record of the specified type is created.

Record Type
Actions

Subject equals New Buyer Created


Compare Attribute Add Condition

High Confidence Contact

This will trigger when the tags that you have set go off.

In this case we have set a tag to be a high confidence contact.

This will add a comment to the contact record if triggered letter your broker know that this is high intent.



Record Updated → Edit Tags → Add Comment

Record Updated
Triggered when some updates a record of the the specified type.

Record Type
Contacts

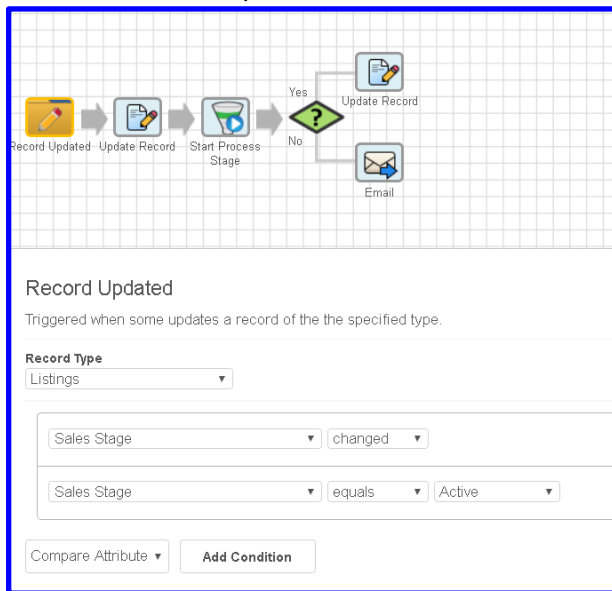
Confidence changed

Confidence equals 5

Compare Attribute Add Condition

Listing Activated- Seller

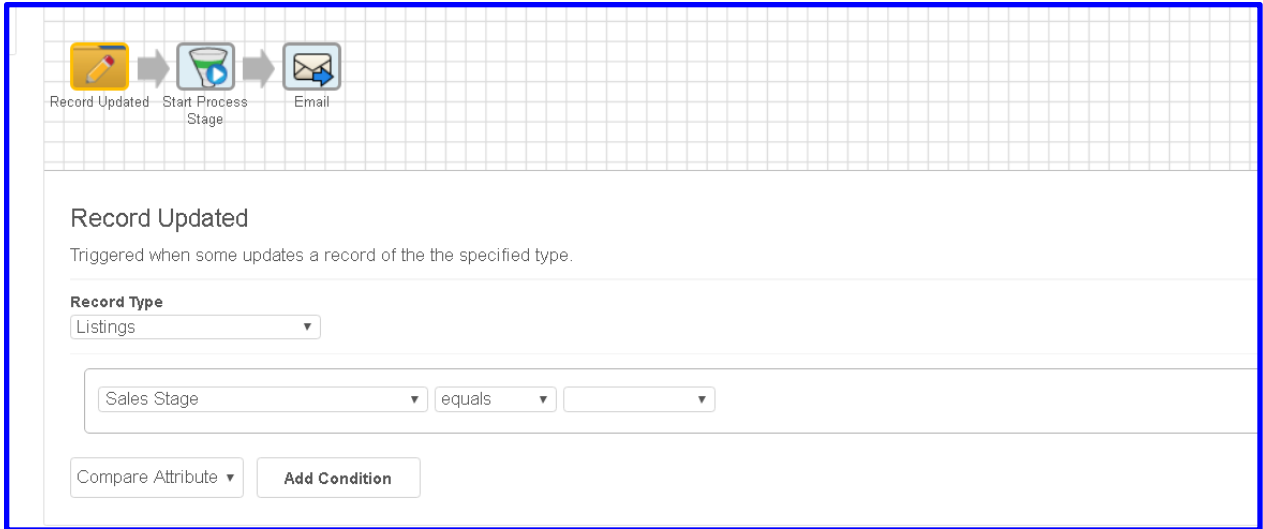
This workflow is set when a listing is activated by the seller. The workflow will start once the record has been updated.



Listing Closed

*This gets triggered when a listing has been closed.
The system will send an email out once this action has been done.*

The record type is listings.

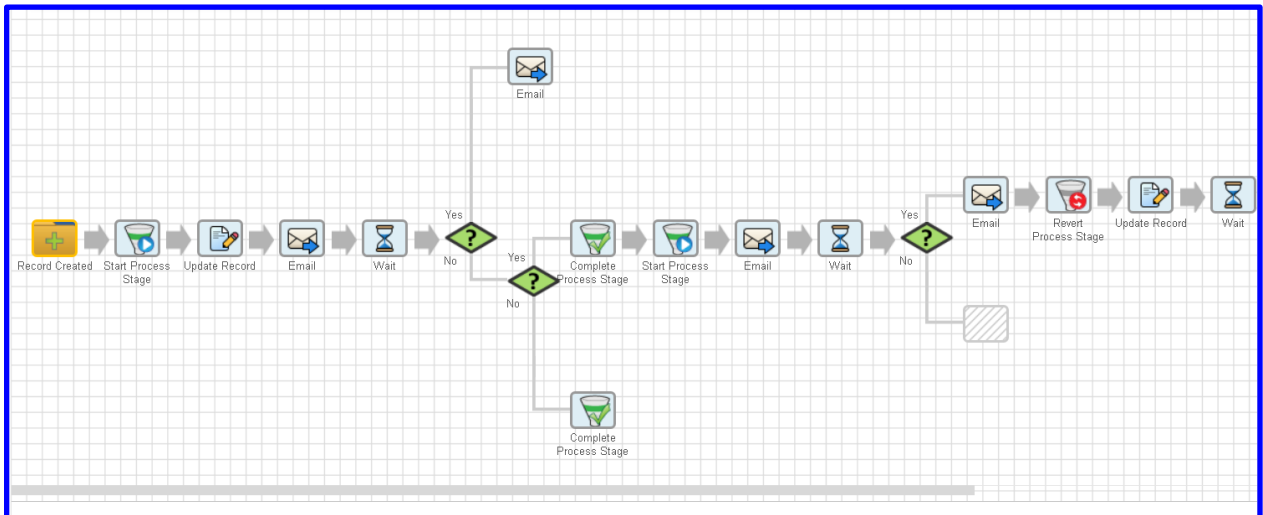


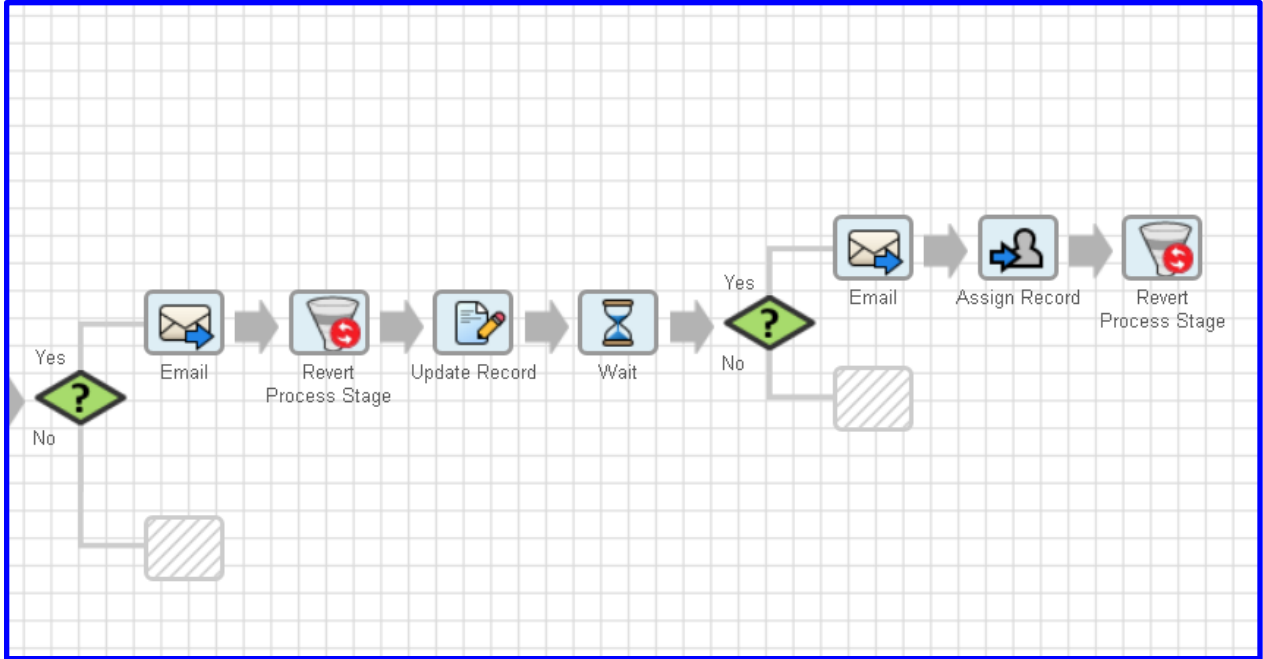
Listing Created - Email Broker

This one of the more complex workflows.

It triggers when a listing is created. It will send an email to the broker based on the actions that are taken.

You can see the flow below.





Listing Disabled

When a listing becomes disabled in the sales stage, once the record is updated an email will be sent and this begins the process.

Record Updated

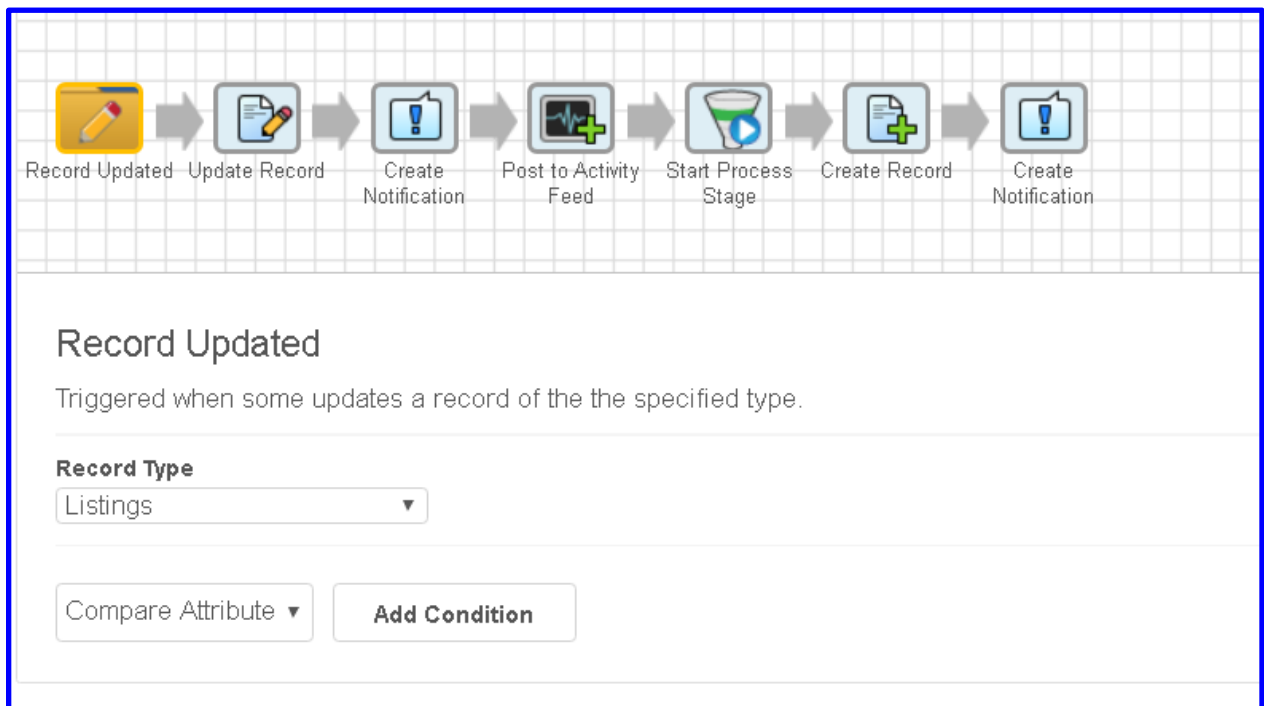
Triggered when some updates a record of the the specified type.

Record Type
Listings

Sales Stage equals Disabled

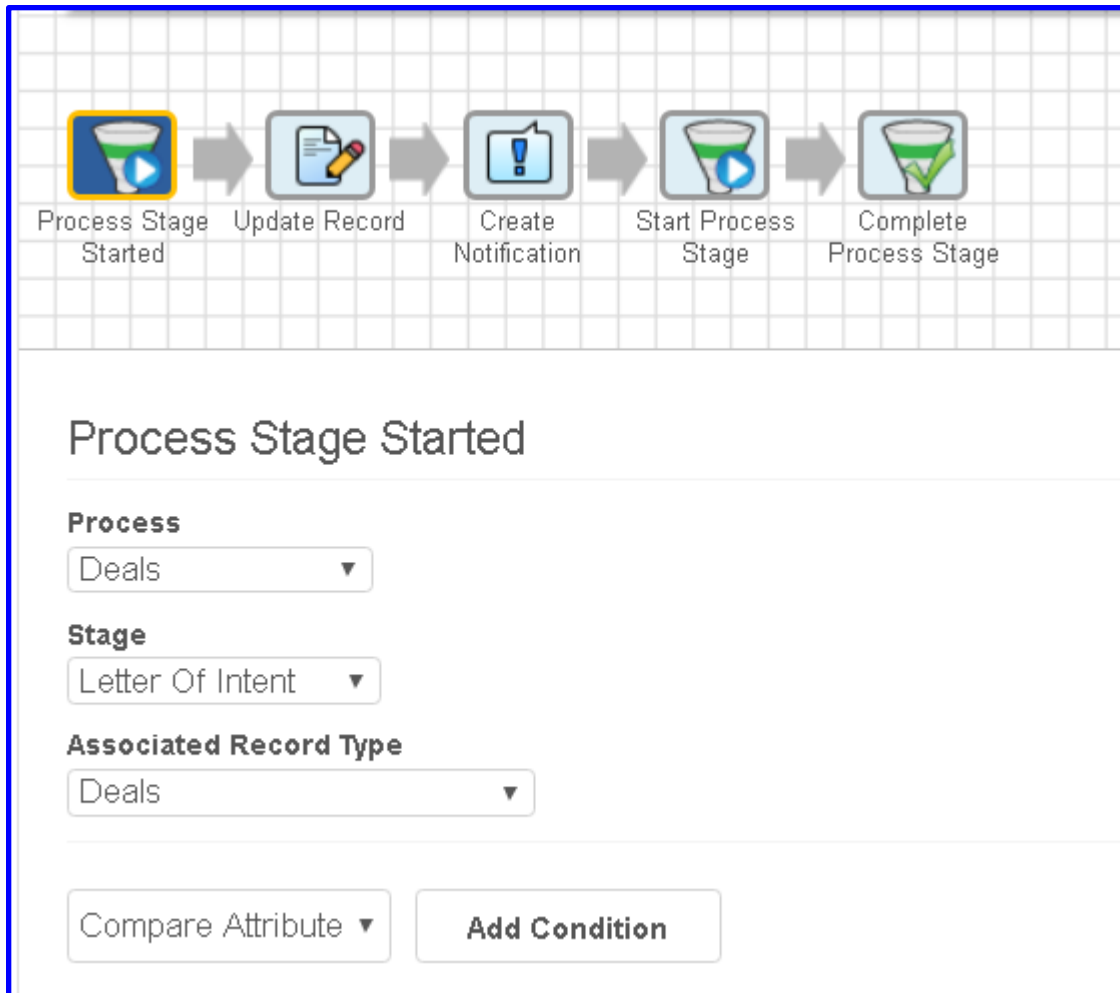
Listing LOI

The listing LOI is when a listing has been changed from active to LOI (Letter of intent) This is a feature that you have requested in your CRM. The workflow will automatically create a deal record in the **Deals module**. This will pull information from the buyers record, sellers record and the listing. This will give the broker the opportunity to fill out any new information I.E lawyers information, negotiated information to create a deal fact sheet.



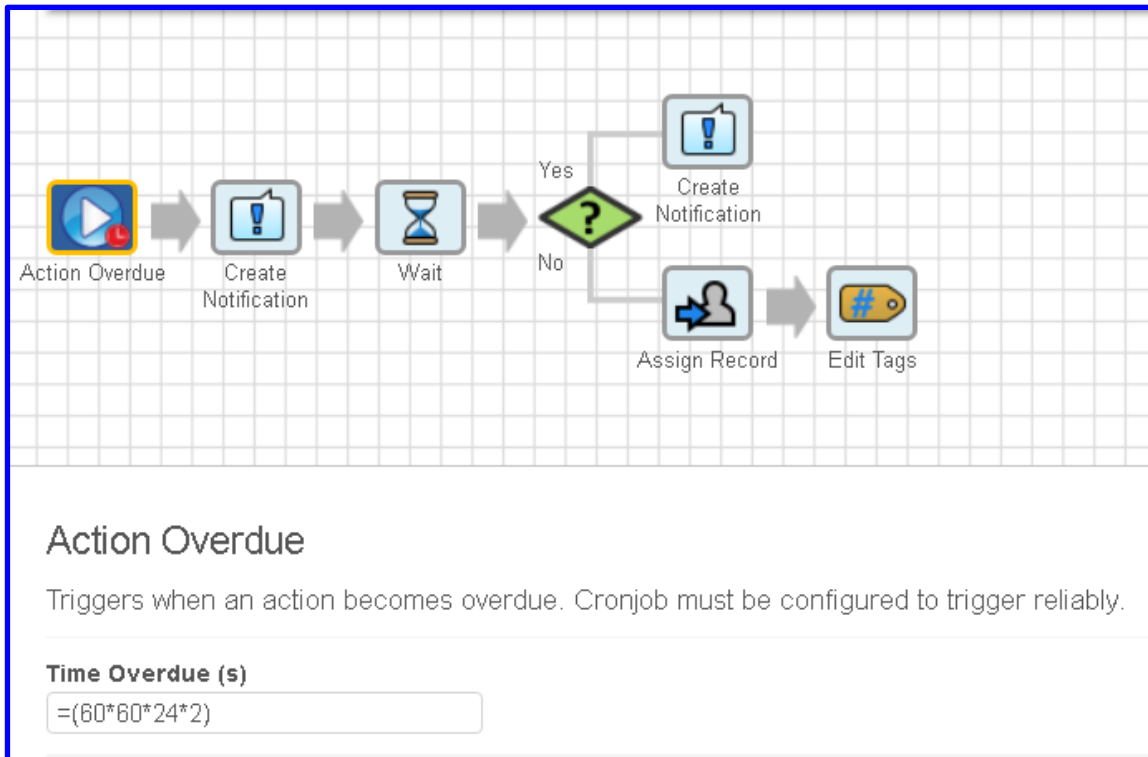
Opportunity LOI

This is when a new opportunity is created and need to send and sign LOI. The process is **Deals** and is associated with the deals record type.



Overdue Action

This is triggered when an action becomes overdue. It has two paths it can take.



You can adjust the parameters to notify you when the time is overdue.

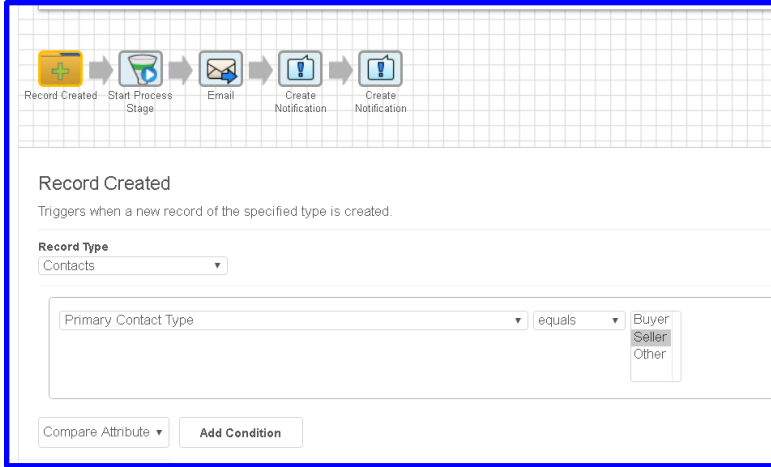
Release Address Update

When a listing address is released, this workflow will update the record accordingly and post a message to the activity feed of the byers broker.



Seller Lead

When a seller record is created from the web form on the sellers page on the website, this workflow will send an email notification.

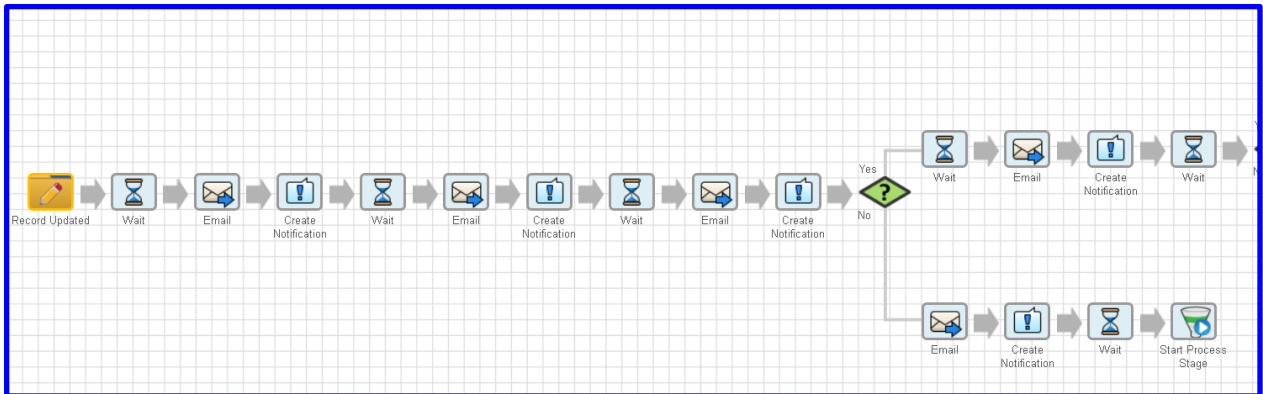


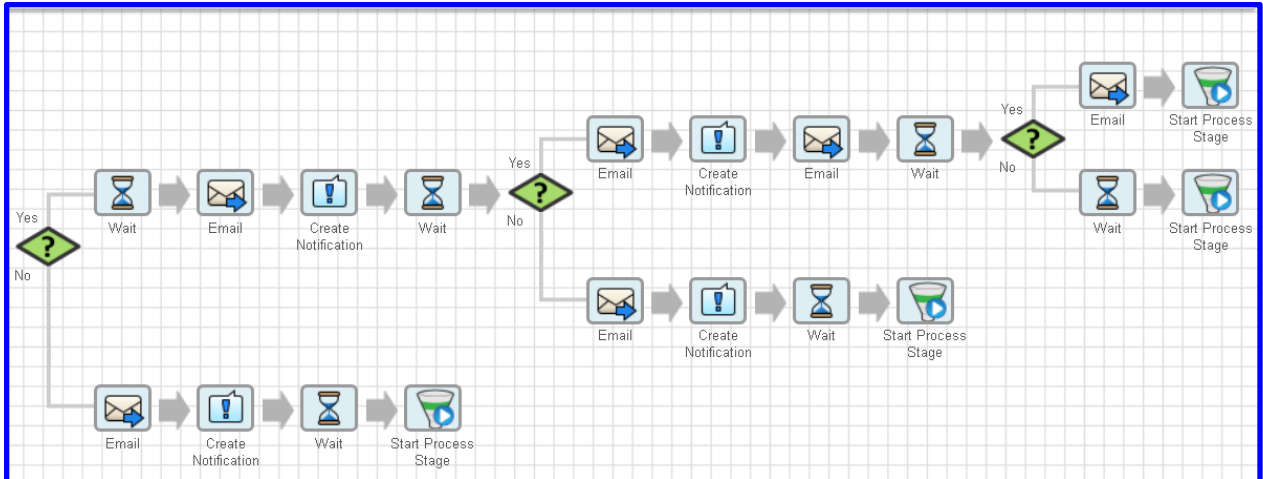
Seller Lead Assigned

This is part of the pre-listing process

It is triggered when someone updates a record of the specified type.

*Here we are dealing with **Seller Contacts**.*





Record Type
 Contacts

Primary Contact Type equals Buyer
 Seller
 Other

Agent changed

Assigned To equals API User

Compare Attribute Add Condition

Null Broker

This is the null broker process.

The system will send you an email when an action is overdue when dealing with a broker.

You can assign it to an email address in your system.

The screenshot shows a workflow configuration interface. At the top, there is a visual representation of the workflow: a blue play button icon labeled 'Action Overdue' with a red notification bell, followed by a grey arrow pointing to an envelope icon labeled 'Email'. Below this, the configuration for the 'Action Overdue' trigger is shown. The title is 'Action Overdue' and the description is 'Triggers when an action becomes overdue. Cronjob must be configured to trigger reliably.' Under the heading 'Time Overdue (s)', there is a text input field containing the placeholder text '{assignedTo.emailAddress}'. Below the input field, there are two dropdown menus: the first is set to 'Reminder' and the second is set to 'equals', followed by a small grey square checkbox. At the bottom, there is a 'Compare Attribute' dropdown menu and an 'Add Condition' button.

Seller Drip Campaign Workflow

Sends a reminder to the internal marketing dept to touch base with the seller to ascertain what the status is of listing the opportunity.

Record Updated
Triggered when some updates a record of the the specified type.

Record Type
Contacts

Primary Contact Type equals Buyer
Seller
Other

Seller Drip Campaign changed

Seller Drip Campaign equals

Change Agent Record Workflow

When a record is changed in the system this will automatically update that record.



Record Updated Update Record

Record Updated

Triggered when some updates a record of the the specified type.

Record Type

Listings ▼

CRM User ▼

changed ▼

Compare Attribute ▼

Add Condition

The Buyer Experience

In this section we cover the entire front end experience for the buyer. This will give you a breakdown of how everything functions from their perspective.

Contents

- **Buyer Registration**
 - **Buyer Login**
 - **Data Room Page**
 - **Searching The Listings**
 - **Adding Listings Not Currently In The Data Room**
 - **Hiding Listings**
 - **Requesting Addresses**
 - **Business Profile Page**
 - **Downloading Files**
 - **Security Watermark**
 - **Buyer Profile**
-

Buyer Registration

Click on a listing, once you do that, a buyer can click on the buyer registration link on the top which is in the screenshot. Or, click on submit an NDA or from a listing click on the bottom of a profile.

Home > Buyer registration

Buyer registration

Email:* test@test.com

First Name:* Jane

Last Name:* Smith

Cell Phone:* 303 960 5890

Password:*

Confirm Password:

Address: 123 Any St.

Address 2: Suite 102

City: Anytown

State: New York

Country: US

Postal Code: 11222

Additional Information:

Next

Fill out the form, and click on the **Next** button. This will bring you to the NDA form.

1. This **Non-Disclosure Agreement** (the "**Agreement**") is made as by and between the undersigned ("**Prospective Purchaser and/or Purchaser's Agent**") and CBS-Global, LLC, a Wisconsin limited liability company doing business as Creative Business Services with its principal place of business at 319 N Broadway St, Green Bay, WI 54303 ("**Creative**").

Whereas, Prospective Purchaser and/or Purchaser's Agent and Creative are conducting discussions concerning the possible acquisition by Prospective Purchaser and/or Purchaser's Agent of the business/real estate described in the listing contract between Seller and Creative (which such business/real estate shall be sometimes referred to herein as the "**Business**") and, in connection with such discussions and Prospective Purchaser and/or Purchaser's Agent's evaluation of the possible acquisition of the Business (together, the "**Permitted Use**"), Creative shall disclose to Prospective Purchaser and/or Purchaser's Agent certain financial and other business information, in written and

Please scroll to the end of the contract to indicate that you've read it.

Register

You will be forced to scroll to the bottom. When you get to the bottom, the digital signature tool will pop up. The buyer should type their name in and check off the “**I Accept**” and sign your name on the signature pad, click register, and that’s it!


By selecting the “I Accept” button, I am signing this Agreement electronically. I agree that my electronic signature is the legal equivalent of my manual signature on this Agreement. By selecting “I Accept” I consent to be legally bound by this Agreement’s terms and conditions.

First Name:	Jane	Last Name:	Smith
Address:	123 Any St.	City:	Anytown
State:	New York	Zip:	11222

Please scroll to the end of the contract to indicate that you’ve read it.
Please fill out this textbox with the same first name and last name you used on the first part of the form. The field is case-sensitive. By filling out this textbox, clicking on the checkbox, and signing the signature box, you agree to the terms of this Non-Disclosure Agreement.

Jane Smith I accept

Sign Here:



[reset](#)
[Register](#)

Once you’ve clicked on the register button, then you are prompted to a “**Thank You**” page with instructions to confirm the registration.

Home > Buyer registration

Buyer registration

Thank-you for registering with Business Brokers.

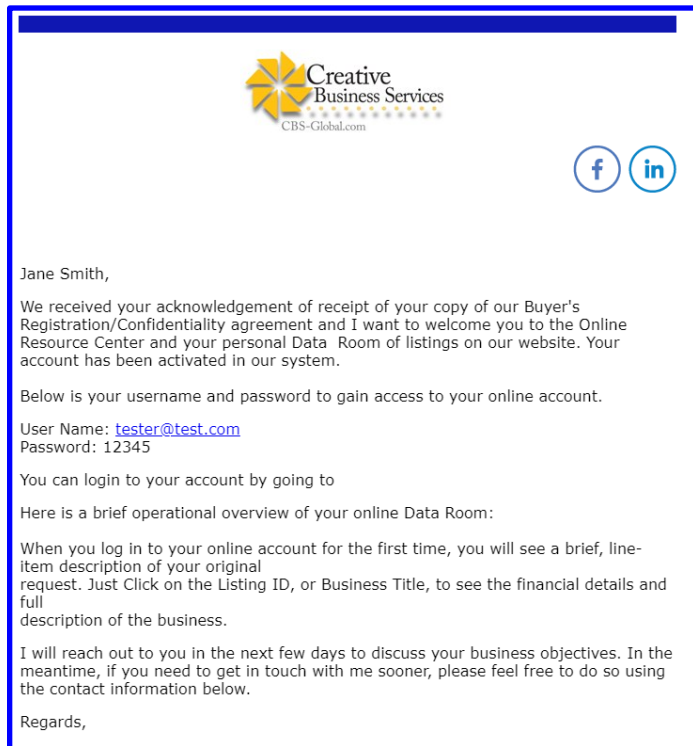
Your account will be activated as soon as we confirm your account. You will receive a copy of the agreement to the email you provided on the registration form.

[Please reply to that email so that we can confirm your account.](#)

Once your account has been confirmed, log into your account by using the Login link above.

Once the buyer has confirmed their registration, somebody from the admin team, will accept that buyer and activate them, by changing the buyer status from **Unregistered** to **Registered**.

Once you are activated, the buyer and broker receives notification that the user is activated and now they can login to their data room.



Buyer login

Have your buyer click on “**Buyer Login**” when they do that, you will see the following screen.



After you click on **buyer login**, it will come up with a place to type username and password. From there you will be taken to your data room. The listings that were added to the data room which was discussed previously in contact records, will now all show up here.

The Data Room

Data room of Jane Smith

★ The address of this business is available to you

Relocate or Start Your New Business Here!

ID:	Business Name:	Location:	Address:	Price:
332	Brooks Auto Sales & Service	Manitowoc	3801 Calumet Ave	359,000

[View Listing Details](#) [Hide from Data Room X](#)

✓ This property is in your data room

Wildly Popular Iconic Mexican Restaurant

ID:	Business Name:	Location:	Address:	Price:
218	Please request the address to see this information.	Please request the address to see this information.	Please request the address to see this information.	\$1,295,000

If you take a look at both listings, you will see one has the address released, while the other doesn't.

The one with the green bar on top means the address was released, while blue means not yet. If you notice, when an address is released, you have 2 buttons. **View Listing Details** and **Hide Listing**.

If the owner wants to hide the listing in the data room, They can click the button and it will be hidden. It simply hides the listing but does not remove it from the data room. The broker can easily make the listing visible again by clicking the un hide tool in the data room.

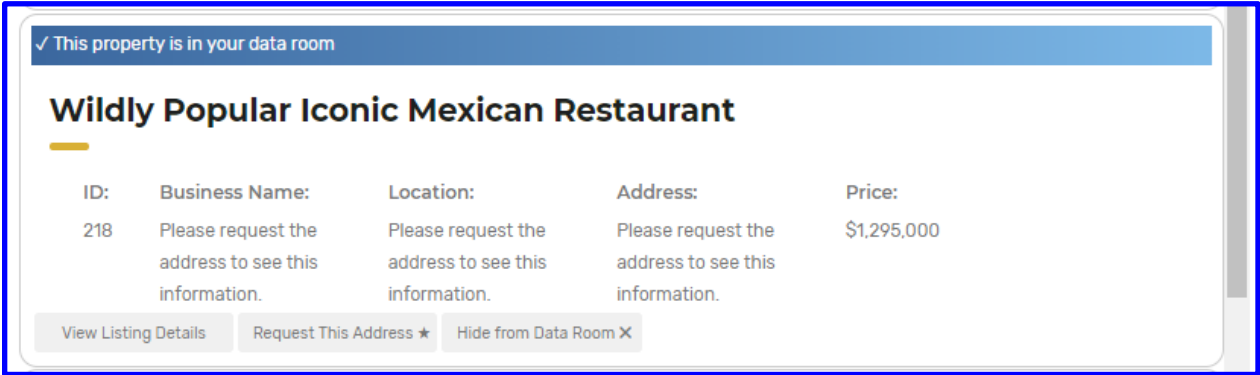
If you want to see the full listing details click, **view full listing**.

If a listing has not yet been released it will have three buttons below.

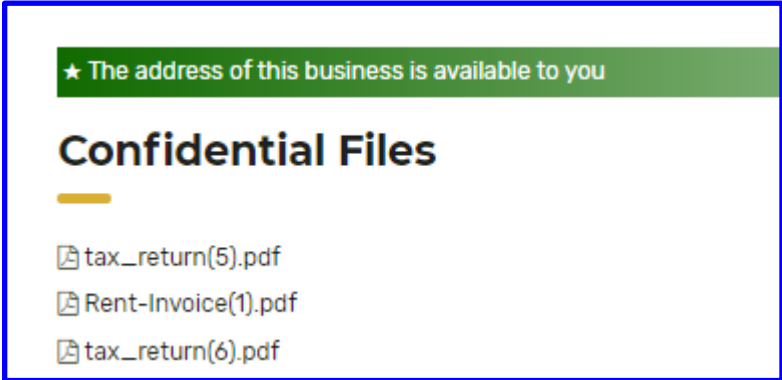
View Listing Details, Request This Address and Hide From Data Room.

The first two we've previously discussed, now we will talk about **Request This Address**.

When you click on this button, it sends an automatic notification to the broker saying, the buyer has requested info about this listing and it will also send an email to the buyer letting them know that we've sent a notification to the broker. The broker has the ability to release the full information to the buyer even though he can't access the confidential information.



Now if you click on the view listing details button, you will be taken to the full view of the listing with all the information needed to show you.



Once the address has been released, your buyers can view all confidential files. You can then set up the data room for the buyer to view the documents. This will come with a personal security watermark on all documents. See screenshot below.

Unit 10
35 Buckingham Drive
WANGARA, WA
6065

A.B.N. 57 216 015 023
A.C.N.

Invoice No.: 00
Date: 5/0
Ship Via:

Bill To:
WA Blinds
3/35 Buckingham Drive
Wangara WA 6066

Ship To:
WA Blinds
3/35 Buckingham Drive
Wangara WA 6066

DESCRIPTION	AMOU
For rent of premises 3/ 35 Buckingham Drive Wangara 01/04/81 to 30/04/18	\$1,650

Your Order No: **Customer ABN:** **Freight:** \$

Shipping Date: **Terms:** Net 30th after EOM **GST:** \$15

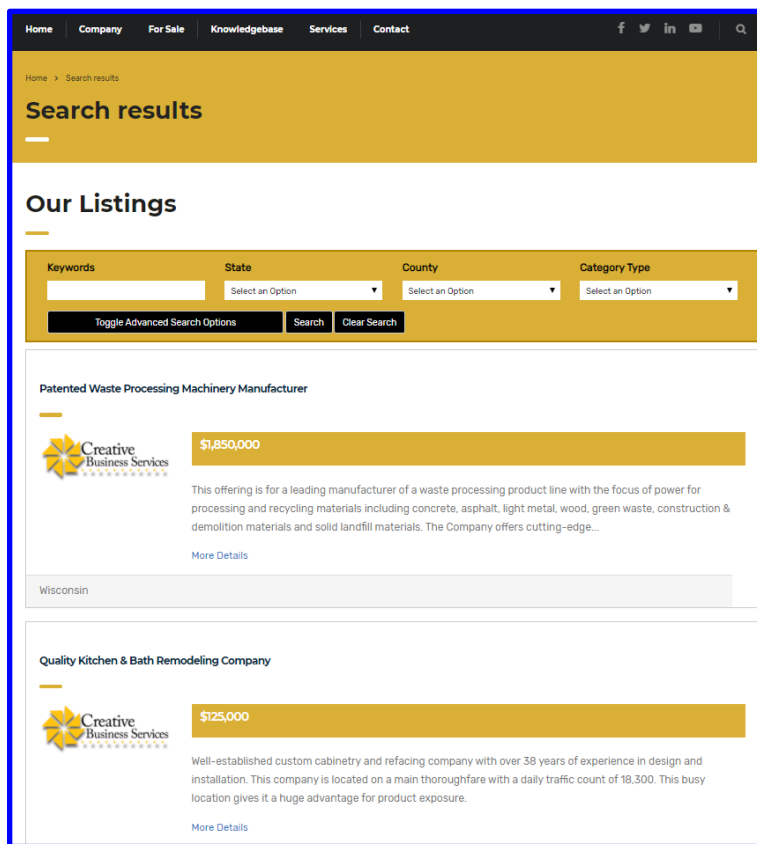
Comment: **Total Inc GST:** \$1,65

Code	Rate	GST	Sale Amount	Amount Applied:
GST	10%	\$150.00	\$1,500.00	

Thank you!

If the buyer is logged into their data room, they will have a button to add this particular listing to the data room. From there, the broker can add additional listings to this data room.

Searching The Listings



The screenshot shows a website interface for searching business listings. At the top, there is a navigation bar with links for Home, Company, For Sale, Knowledgebase, Services, and Contact. Below this is a search bar with the text "Search results". The main heading is "Search results", followed by "Our Listings". A search filter section includes fields for Keywords, State (with a dropdown menu), County (with a dropdown menu), and Category Type (with a dropdown menu). Below the filters are buttons for "Toggle Advanced Search Options", "Search", and "Clear Search". The search results are displayed in two cards. The first card is titled "Patented Waste Processing Machinery Manufacturer" and features the Creative Business Services logo, a price tag of \$1,850,000, a brief description of the company's services, and a "More Details" link. The second card is titled "Quality Kitchen & Bath Remodeling Company" and also features the Creative Business Services logo, a price tag of \$125,000, a brief description of the company's services, and a "More Details" link.

Here, buyers can search through the listings to see what is in the data room.

