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1. Screens

1.1. Home

1.1.1. User Interface

360 Start Page

Welcome Jan T. User Choose Facility:
Facility: 123654

View daily 360 reports for facility:

View daily 360 report for Sales Counselor:

Lead Expiration Alerts:

Lead #	Name:	SC:	Exp. Date:
0123	Doe, John	Howe, Mary	5/30/06
0145	Hill, Mike	Jones, Bill	5/31/06

Record:

- [Add Lead](#)
- [Add Appointment](#)
- [Record Presentation Activity](#)
- [Record Other Activity](#)

Report:

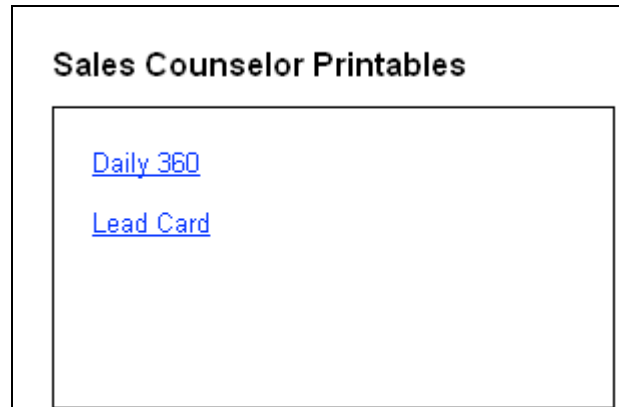
- [View Active Leads](#)
- [View Leads](#)
- [SC Activity Report](#)
- [SC Printables](#)

Manage:

- [Sales Counselors](#)
- [Sales Managers](#)
- [Sales Admins](#)
- [Telemarketers](#)
- [Lead Sources](#)
- [Red List](#)

1.2. SC Printables

1.2.1. User Interface



1.3. 360 Report

1.3.1. User Interface

360 Report

Facility: 00123
Change Facility: Choose Sales Counselor: Choose Date Range: date to date

Facility: 00123 Sales Counselor: Mary Howe Date Range: 5/15 - 5/21 2006

Overview Summary:

Date:	# Apt.	# Leads	# Pres.	\$ Sales	A	B	C
5/15	2	5	1	3750	2.75	2.75	3.5
5/16	3	2	0	0	3.50	3.75	3.25
5/17	0	3	1	2450	3.75	2.25	2.75
5/18	3	2	1	1450	4.25	4.5	1.75
5/19	2	1	0	0	2.75	2.25	4.5
5/20	0	0	0	0	0	0	0
5/21	0	0	1	0	3.50	1.25	2.25
Totals:	10	13	4	8500	22.5	17.25	15.75

[View Leads Summary](#)
[View Appts./Pres. Summary](#)
[View Other Activities Summary...](#)
[Print Report](#)

1.3.1.1. View Leads Summary

State1

Leads Summary: [close](#)

Recd. Date:	Exp. Date:	Lead #:	Name:	Address:	Phone:
2/15/06	3/15/06	00123	Doe, John	55 E. Maple Lane, New Orleans, LA 70117	504-488-9063
2/13/06	3/30/06	00125	Hanks, Tom	1021 Ford St., New Orleans, LA 70117	504-944-5632
2/12/06	3/12/06	00254	Ames, Willie	418 Bellview St., River Ridge, LA 70123	504-947-9632
2/10/06	3/10/06	00259	Brown, Mardge	2829 Ursulines Ave., New Orleans, LA 70119	504-279-2976
2/09/06	3/09/06	00365	Forra, Dora	4524 Urquhart St., New Orleans, LA 70117	504-361-3698

1.3.1.2. View Appointments/Presentations Summary

State1

View Appointments Summary [close](#)

Date:	Lead:	Name:	\$ Prop.	\$ Merch.	\$ Funl.	Descr.	No Sale	Duration:
3/15/06	00123	Doe, John					Cus. has settlement coming in 3 mths.	2.5
3/18/06	00125	Hill, Mike	1500	2500	7500	Bought full burial package	n/a	3.25
5/30/06	00254	Tan, Ming					upcoming	1.5

1.3.1.3. View Other Activities Summary

State1

View Other Activity Summary [close](#)

Date:	Activity:	Duration:	# Leads	# Appts.	Notes:
3/15/06	Park Walk	3 hrs 45 min	2		
3/16/06	In Office	2 hrs		1	Walk In
3/17/06	Training	6 hrs			Sales training seminar

1.4. Admin-Add Sales Manager

1.4.1. User Interface

Admin: Add Sales Manager

Type name or select from list:

- Adams, Mike
- Doe, Jane
- Howe, Mary
- Ingalls, Laura
- Jones, Henry
- Lovett, Lyle
- McLachlan, Sarah
- Portman, Natalie

Recently Added Sales Managers:

- Jones, Bob
- Marks, Henry

1.5. Add Lead

1.5.1. User Interface

Add Lead

Date Received: <input type="text" value="enter text..."/>	Expiration Date: <input type="text" value="enter text..."/>		
Lead Source: <input type="text"/>			
<i>Assign Lead:</i>			
Choose: <input type="text"/>	Select: <input type="text"/>		
<hr/>			
<i>Decedent's Name:</i>			
Title: <input type="text"/>	First: <input type="text" value="enter text..."/>	Middle: <input type="text" value="enter"/>	Last: <input type="text" value="enter text..."/>
<i>Customer's Name:</i>			
Title: <input type="text"/>	First: <input type="text" value="enter text..."/>	Middle: <input type="text" value="enter t"/>	Last: <input type="text" value="enter text..."/>
Address: <input type="text" value="enter text..."/>			
City: <input type="text" value="enter text..."/>	State: <input type="text" value="enter text..."/>	Zip: <input type="text" value="enter text..."/>	
Phone Number: <input type="text" value="enter text..."/>	Alternate Phone Number: <input type="text" value="enter text..."/>		
<hr/>			
Notes: <input type="text" value="enter text..."/>			
<hr/>			
<input type="button" value="Save Lead"/>		<input type="button" value="Cancel"/>	

Customer Interests:

Facility Choice:

Cemetery:

Cremation:

Funeral:

Request Planner?
 Property Owner?

Recently Added Leads:

- [00123: Doe, John](#)
- [00124: Gilroy, Mamie](#)

Add To:

Red List

Notes:

1.5.1.1. Do Not Contact Alert

State1

Alert!
Customer is listed on the following Do Not Contact lists:

- Do Not Call
- Do Not Mail
- Red List

Continue **Cancel**

1.5.1.2. Duplicate Alert

State1

Duplicate Alert!
Possible duplicates:

Name:	Address:	Phone:	Lead Assigned To:
Hanks, Tom J.	1523 Maple St., New Orleans, LA 70117	504-488-9062	Mary Howe

Please verify that the lead is unique and is not a duplicate:

Yes - Unique: Continue Process

No - Duplicate: Cancel Process

1.6. View Active Leads

1.6.1. User Interface

View Active Leads

Choose Sales Counselor:

Sales Counselor Mary Howe has 250 leads. 6 of 250 have appointments.

Active Leads for Mary Howe [Print](#)

Lead #	Name:	Address:	Phone:	Expiration Date:	Status
00123	Doe, John	101 Park Place, New Orleans, LA 70117	504-489-9632; 504- 277-3062	5/30/06	A
00145	Roberts, Sally	55 E. Fry lane, new Orleans, LA 70118	504-400-1872	6/05/06	S
00254	Myers, Marge	1254 Jackson Rd., Chalmette, LA 70043	504-271-2976	6/15/06	P

1.6.1.1. Lead Card Summary

Lead Card Summary

Lead Card Summary:

[close](#)

Lead #:

00123

Name:

John M. Doe

Address:

151 Maple Drive
New Orleans, LA 70117

Primary Phone Number:

504-488-9062

Alternate Phone Number:

504-488-9072

Lead History Summary:

Date:	Activity:	Time Spent:
3/15/06	Phone Call	30 min
3/18/06	Presentation	2 hrs 30 mins

[View Detailed Lead History](#)

1.7. Lead Histroy

1.7.1. User Interface

Lead History

[Add Lead Activity](#) [Add Appointment](#)

Lead #: 00123 **Facility:** 123654 **Received Date:** 3/15/2006 **Expiration Date:** 4/15/2006
Lead Assigned To: Sales Counselor, Mary Howe [Edit Assignment...](#) [Change Expiration Date](#)
Lead Source: Referral

Lead Details:		Customer Interests:	
Name: John M. Doe	Address: 151 Maple Drive, New Orleans, LA 70117	<i>Facility Choice:</i> Cemetery - Ground	
Primary Phone Number: 504-488-9062	Alternate Phone Number: 504-488-9072	Requested Planner? Yes Property Owner?: No	
Email: jdoe@yahoo.com	Best Time to Call: Evening	Do Not Contact Lists: On DNM edit...	
Edit Lead Details...			

Lead Activity Details:

Date:	Activity:	Duration:	\$ Property	\$ Merch.	\$ Funl.	Descr.	No Sale
3/15/06	Phone Call	30 min					Set up appt.
3/18/06	Presnt.	2 hrs 30 min	1500	2500	7500	Bought full burial package	n/a

Notes:

Date:	Note:
3/15/06	Customer has two elderly parents and wishes to make prearrangements for them.
3/12/06	Customer referred by customer's daughter.

[Add Note...](#)

1.7.1.1. Change Expiration Date ui

State1

Change Expiration Date:

Current Date: 3/15/06

New Date:

1.7.1.2. Add Note ui

State1

Add Note:

1.7.1.3. Add Lead Activity

State1

Add Lead Activity:

Date of Activity: Activity:

Sales:

Property: \$

Merchandise: \$

Funeral: \$

No Sale

If No Sale, why?

Time Spent on Activity:

From:

To:

Notes:

1.7.1.4. Edit Do Not Contact ui

State1

Do Not Contact Red List:

Add to Red List?

Remove from Red List?

1.7.1.5. Edit Assignment ui

State1

Edit Lead Assignment

Lead #: 01236

Assignment Type: Sales Counselor

Assigned To: Mary Howe

- Unassign current assignee
Lead will be unassigned, automatically expired,
and sent to the facility lead pool.
- Unassign current assignee and reassign
to new assignee

Choose Assignment Type:

Select Assignee:

Save

Cancel

1.8. Record Other Activity

1.8.1. User Interface

Record Other Activity

Choose Sales Counselor: Date of Activity: month day

Other Activity for 3/15/06:

Date:	Activity:	Duration:	# Leads	# Appts.	Notes:
3/15/06	Park Walk	3 hrs 45 min	2		
3/15/06	In Office	2 hrs		1	Walk In
3/15/06	Training	6 hrs			Sales training seminar

Duration: Hours # Leads Generated:

Appts: Generated:

Activity:

Notes:

1.9. Add Appointment

1.9.1. User Interface

Add Appointment

Enter Lead: Choose Sales Counselor:

Lead Detail:

Name: John M. Doe

Address: 151 Maple Drive
New Orleans, LA 70117

Primary Phone Number: 504-488-9062

Alternate Phone Number: 504-488-9072

Notes:

Facility: 0012365
Change Facility:

Name:	Date:	Time:
John Doe	5/25/06	2:30 PM
Mike Deere	5/23/06	12:30 PM
Sally Roberts	5/21/06	10:15 AM

1.9.1.1. Lead Details display

State1

Lead Detail:

Name:
John M. Doe

Address:
151 Maple Drive
New Orleans, LA 70117

Primary Phone Number:
504-488-9062

Alternate Phone Number:
504-488-9072

1.9.1.2. Browse Lead Grid

State1

Browse for Leads

Choose a lead from the grid below and click Choose Lead. The grid is sortable by each column row.

<u>Lead #:</u>	<u>Date Recvd.:</u>	<u>Exp. Date:</u>	<u>Customer Name:</u>	<u>Customer Phone:</u>
00123	5/15/06	6/15/06	Jones, Dorsey	504-944-5307
00125	5/16/06	6/16/06	Sconza, Joseph	504-488-9062
00126	5/17/06	6/17/06	Pakron, John	504-361-3677
01136	5/18/06	6/18/06	Thomas, Wayne	504-276-2973

1.10. Record Presentation Activity

1.10.1. User Interface

Record Presentation Activity

Choose Sales Counselor:

Choose Appointment:

Lead Detail:

Name: John M. Doe **Lead #:** 00123

Address: 151 Maple Drive
New Orleans, LA 70117 **Appt. Date:** 5/15/2006

Primary Phone Number: 504-488-9062 **Appt. Time:** 2:30 PM

Alternate Phone Number: 504-488-9072 **Notes:** Don't ring bell; knock on door.

Presentation Notes:

Sales:

Property: \$ Description:

Merchandise: \$

Funeral: \$

No Sale
If No Sale, why?

Recent Activity:

Name:	Date:	Time:
John Doe	5/25/06	2:30 PM
Mike Deere	5/23/06	12:30 PM
Sally Roberts	5/21/06	10:15 AM

Time Spent on Activity:

From: To:

1.10.1.1. Appointment Detail

State1

Lead Detail:

Name: John M. Doe **Lead #:** 00123

Address: 151 Maple Drive
New Orleans, LA 70117 **Appt. Date:** 5/15/2006

Primary Phone Number: 504-488-9062 **Appt. Time:** 2:30 PM

Alternate Phone Number: 504-488-9072 **Notes:** Don't ring bell; knock on door.

1.10.1.2. Add New Appointment

State1

Add New Appointment

Enter Lead:

Sales Counselor:
Don C. Jones

Lead Detail:

Name:
John M. Doe

Address:
151 Maple Drive
New Orleans, LA 70117

Primary Phone Number:
504-488-9062

Alternate Phone Number:
504-488-9072

Appointment Date:

Appointment Time:

Appointment Type:

If At-Need, Deceased's Name:

Notes:

1.10.1.3. Lead Details

State1

Lead Detail:

Name:
John M. Doe

Address:
151 Maple Drive
New Orleans, LA 70117

Primary Phone Number:
504-488-9062

Alternate Phone Number:
504-488-9072

1.10.1.4. Browse Lead Grid

State1

Browse for Leads

Choose a lead from the grid below and click Choose Lead. The grid is sortable by each column row.

Lead #	Date Recvd.:	Exp. Date:	Customer Name:	Customer Phone:
00123	5/15/06	6/15/06	Jones, Dorsey	504-944-5307
00125	5/16/06	6/16/06	Sconza, Joseph	504-488-9062
00126	5/17/06	6/17/06	Pakron, John	504-361-3677
01136	5/18/06	6/18/06	Thomas, Wayne	504-276-2973

Choose Lead

Cancel

1.11. Report-View Leads

1.11.1. User Interface

Report: View Leads

Filter By:
Show:
 Assigned
 Unassigned

Date Range:
mont day year
to
mont day year
 Received Expired
Filter

Search:
Lead #:

Sales Counselor:

Search

Leads for Facility: 0012554 **Change Facility:** [print](#)

Lead #:	Recvd. Date:	Exp. Date:	Name:	Address:	Phone:	Assigned To:
00123	3/15/06	4/15/06	Jones, Mike	101 Deere lane, New Orleans, LA 70119	504-276-2973	Howe, Mary
00125	3/16/06	4/16/06	Doe, John	55 E. Milne Rd., New Orleans, LA 70117	504-271-3061	Johnson, Derrick
00145	3/17/06	4/17/06	Black, Mildred	8521 Clearview, Jefferson, LA 70121	504-488-9062	Brown, Nikesha
00185	3/18/06	4/18/06	Brown, Lilly	2829 Ursulines Ave. New Orleans, LA 70119	504-944-5307	Ellis, Gail
00198	3/19/06	4/19/06	White, Esther	2404 Creely Dr., Chalmette, LA 70043	504-361-3678	Dinette, Brandee
00658	3/20/06	4/20/06	Smith, Gorge	418 Bellview St., River Ridge, LA 70123	504-279-1863	Couget, Cheryl
00321	3/21/06	4/21/06	Thomas, Wayne	4524 Urquhart St., New Orleans, LA 70117	504-568-4372	Napier, Chris

1.12. Admin-Sales Managers

1.12.1. User Interface

Admin: Sales Managers

Filter By:

Facility #

Division: Western
 Eastern

Region: Midwestern
 Southern
 Southwestern
 Western North
 Western South

State:

[Add Sales Manager](#)

All Sales Managers:

The list may be sorted by any column, and may be filtered by using any of the criteria to the left. Click a last name to view the Sales Manager Details.

First:	Last.M.	Facility:	Div.	Region	State:
Foret	Dan	10236	Eastern	Southern	LA
Huard	Matt	10237	Western	Southwestern	CA
Kyzar	Jesse E.	10238	Eastern	Central	AL
Nicholas	Kelly	10239	Western	Western South	AR
Pakron	Joanne M.	10240	Eastern	Northern	OH

1.12.1.1. Sales Manager Detail

State1

Sales Manager Detail

Name: Jackie Chan **ID:** 321456 **Facility:** 547896

Lakelawn Metarie 101 Lake Drive New Orleans, LA 70117 504-488-9321 jchan@stei.com	<i>Assigned Sales Admin(s):</i> Brown, James Charles, Ray Add Sales Admin...
---	---

Remove from Sales Manager table

[close window](#)

1.12.1.2. Sales Admin Detail

State1

Sales Admin Detail

Name: James Brown

Assigned to:

Name:	Unassign:
Chan, Jackie	<input type="radio"/>

Update **Cancel**

1.13. Admin-Sales Counselors

1.13.1. User Interface

Admin: Sales Counselors [Add Sales Counselor](#)

Sales Counselors List
You may sort by Name and Assigned to and may filter the results.

Filter By:

Name:	Sales Manager	Status	Change Status
Cruise, Tom	Fisher, Carrie	Active	<input type="radio"/>
Hanks, Tom	Ford, Harrison	Active	<input type="radio"/>
Newman, Paul	Connery, Sean	Active	<input type="radio"/>
Ryder, Winona		Inactive	<input type="radio"/>
Spielberg, Steven	Lucas, George	Active	<input type="radio"/>

1.13.1.1. Sales Counselor Details UI

State1

View Sales Counselor Details	
Sales Counselor: Mike Dowe	SC ID: 001236
Sales Manager: Mary Jenkins	Status: Active change status...
Facility #: 25418 Location: Lake Lawn Address: 101 Lake Drive, New Orleans, LA 70119 Phone: 504-488-9063	Sales Stats
<input type="button" value="Edit"/>	

1.13.1.2. Edit Sales Counselor UI

State1

Edit Sales Counselor	
Sales Counselor: Mike Dowe	SC ID: 001236
Change Last Name:	Choose New Sales Manager:
<input type="text" value="enter text..."/>	<input type="text" value=""/>
Location:	
<input type="text" value=""/>	
<input type="button" value="Update"/>	<input type="button" value="Cancel"/>

1.13.1.3. Change Status alert

State1

Changing the status to Inactive will remove the Sales Counselor from the active SC list and remove the association between the SC and the SM.

Ok

Cancel

1.14. Admin-Add Sales Counselor

1.14.1. User Interface

Admin: Add Sales Counselor

Choose Facility:

First Name: Middle: Last Name:

Sales Manager:

Recently Added Sales Counselors:

- Hill, Mike
- Brown, Beavis

1.15. Admin-Add Sales Admin

1.15.1. User Interface

Admin: Add Sales Admin

Type name or select from list:

- Adams, Mike
- Doe, Jane
- Howe, Mary
- Ingalls, Laura
- Jones, Henry
- Lovett, Lyle
- McLachlan, Sarah
- Portman, Natalie

Recently Added Sales Admins:

- Jones, Bob
- Marks, Henry

1.16. Admin-Sales Admins

1.16.1. User Interface

Admin: Sales Admins

[Add Sales Admin](#)
[Assign Sales Admin](#)

Sales Admin List

You may sort by Name and Assigned to and may filter the results.

Filter By:

Name:	Assigned To:	Status	Change Status
Cruise, Tom	Fisher, Carrie; Hamill, Mark	Active	<input type="radio"/>
Hanks, Tom	Ford, Harrison	Active	<input type="radio"/>
Newman, Paul	Connery, Sean	Active	<input type="radio"/>
Ryder, Winona		Inactive	<input type="radio"/>
Spielberg, Steven	Lucas, George; Threepio, R2D2	Active	<input type="radio"/>

1.17. Admin-Assign Sales Admin

1.17.1. User Interface

Admin: Assign Sales Admin

Facility #: 123654 Change Facility:

Choose Sales Admin:

Sales Counselor: Mary Hill

The sales counselor is assigned to all names in the Assigned To column. To add a sales manager to the Assigned To column, select a name and then click the arrow pointing to the Assigned To column. To remove a sales manager from the Assigned To column, select the name and click the arrow pointing to the All Sales Managers column.

All Sales Managers		Assigned To:
Jones, Bob	<<	Monte, Eileen
Thomson, Henry	>>	
Howe, Janet		

1.18. Admin-Lead Sources

1.18.1. User Interface

Admin: Lead Sources

[Add Lead Source...](#)

Active Lead Sources:		Inactive Lead Sources:
Walk In	<< >>	Website
Call In		Commercial
Self-Generated		
SE		

Save Changes

1.18.1.1. Add Lead Source

State1

Add Lead Source

Lead Source:

Add **Cancel**

1.19. Admin-Telemarketers

1.19.1. User Interface

Admin: Telemarketers

Telemarketers: [Add Telemarketer...](#)

Click a row to select and edit.

Sort By:

[print](#)

<u>Name:</u>	<u>In/Out</u>	<u>Address:</u>	<u>Zipcode:</u>	<u>Phone:</u>
Calls R.us	Out	15 E. Biz Way, Los Angeles, CA	32245	555-555-9632
Sunnyvale Oaks Funeral home	In	2123 Lakewood Lane, Lake Oaks, CA	32254	552-555-3214
TeleMaster	Out	9852 Holly St., New Orleans, LA	70119	504-944-5307
CallPool USA	Out	8745 Conti St., New Orleans, LA	70117	504-488-3214

1.19.1.1. Add telemarketer

State1

Add Telemarketer

Name or Company: In House
 Outside

Address:

City: State: Zip:

Phone:

1.19.1.2. Edit Telemarketer

State1

Edit Telemarketer

Make any necessary changes to the telemarketer information below and click UPDATE to save. To remove the telemarketer from the active list, select DELETE.

Name or Company:

- In House
 Outside

Address:

City:

State:

Zip:

Phone:

1.20. Admin-Red List

1.20.1. User Interface

Admin: Red List

Search for customers on Red List:

First: Middle: Last:

Address:

City: State: Zip:

Phone:

[View All](#)

The following customer(s) are on the Red List: [print](#)

Name:	Address:	Phone:	Remarks:
Doe, John J.	101 Blue St., Here, LA 70123	504-488-9063	
Doe, John K.	55 Red Lane, There, LA 70123	504-279-8562	