CUSTOMER SERVICE

If you ever need help with your Open Leads 3 account, just give us a call at 1-800-587-2030. We'll be happy to work through any issue and configure your Leads 3 account so it works best for you.

Plus, help is always available online, and by email: info@openleads.com.

Open Leads 3

The Open Companies, Inc.
1.800.587.2030
www.openleads.com
info@openleads.com

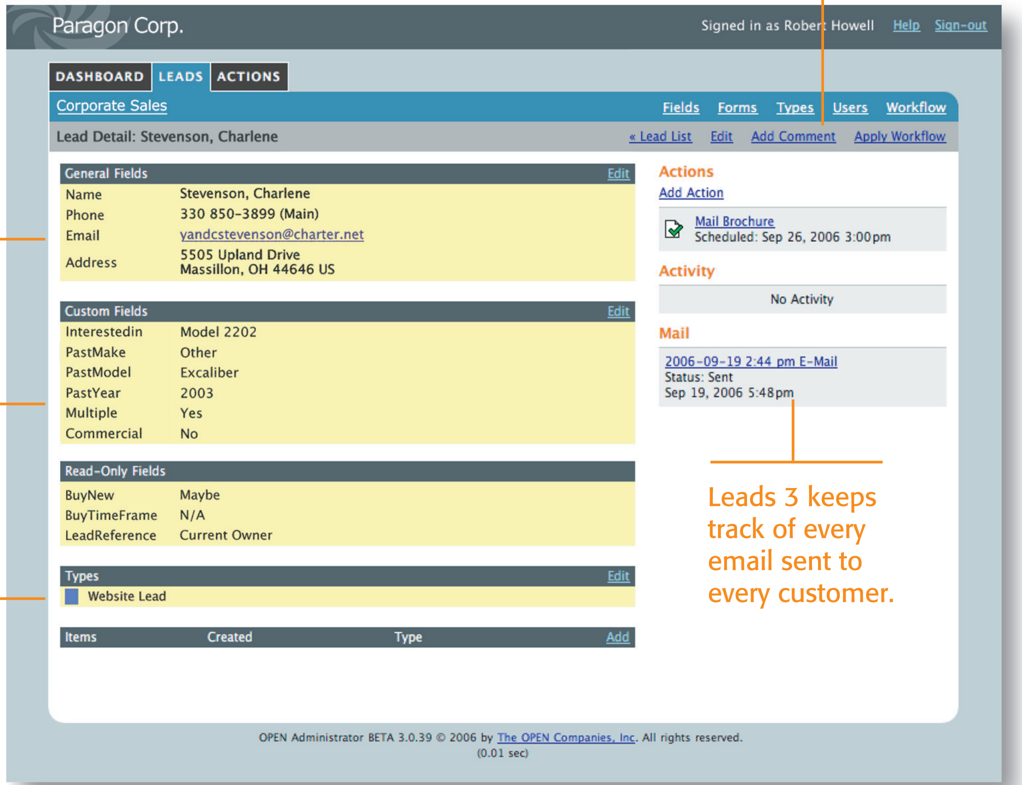
3 THE LEAD DETAIL SCREEN

You can use Leads 3's Commenting feature to keep an accurate history of the entire sales process. Simply add a comment every time you contact the customer, and Lead 3 stamps each comment with the date, time, and author.

Clicking the email link allows you to compose and send emails directly from Leads 3.

You can add as many custom fields as you want, to store any info you need to know about the lead.

Leads 3 allows you to create and assign an unlimited number of sales types, such as 'Hot Prospect' or 'Repeat Customer.'

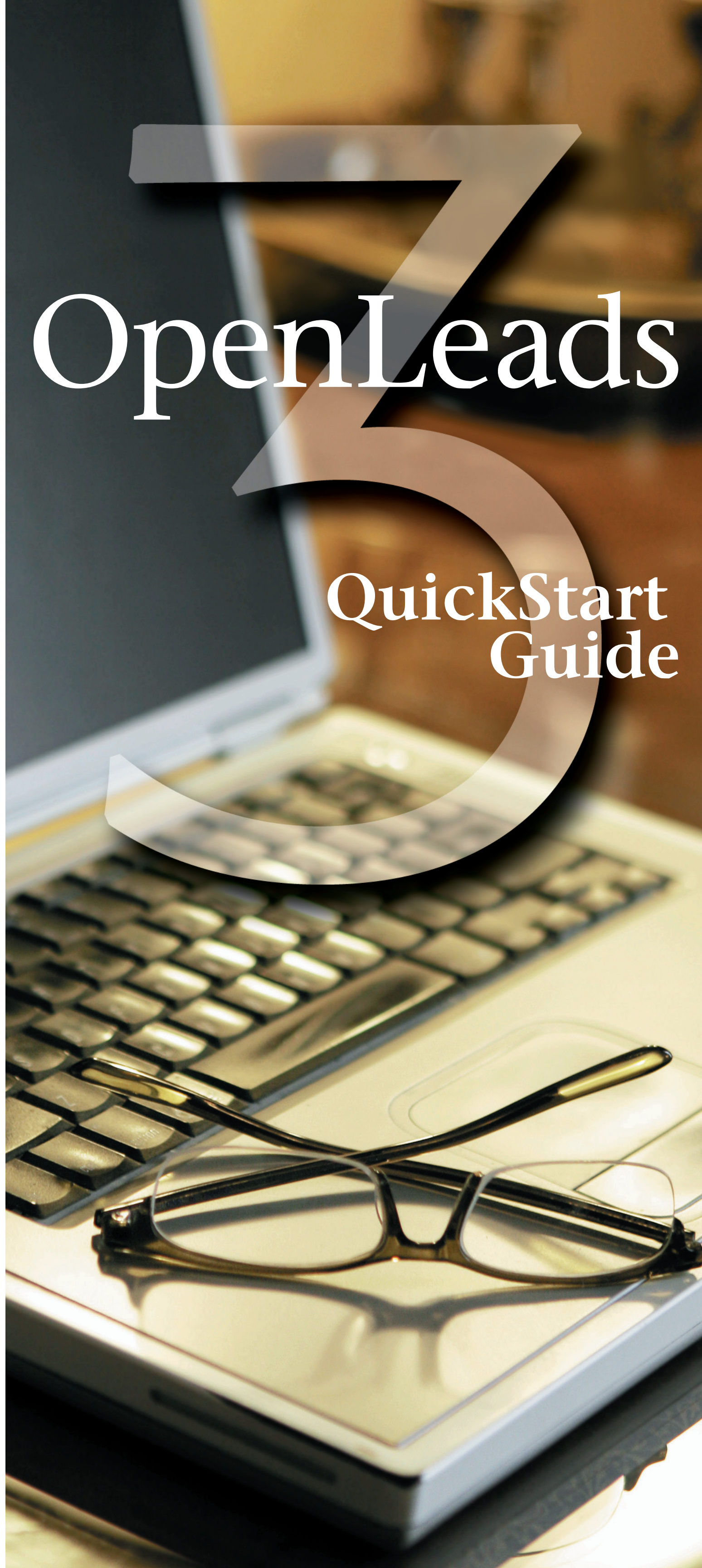


Leads 3 keeps track of every email sent to every customer.

ABOUT WORKFLOWS

Your Open Leads 3 account comes configured with a standard sales workflow. This is attached automatically to each incoming lead. You can edit this workflow to better suit your own business practices, or write new workflows from scratch and apply them to any or all leads.

The standard workflow includes the following steps: 1) Email response (this is handled automatically through the autoresponder feature). 2) Make initial contact call. 3) Send sales literature. 4) Make follow-up call. 5) Send follow-up satisfaction survey (this is a timed feature set to be completed 15 days after the lead comes in).



OpenLeads 3

QuickStart Guide

Getting started in Leads 3

SETTING UP YOUR ACCOUNT

To set up a new account, go to www.myopenleads.com and enter your email address in the field given. An email message will be sent instantly to that address, containing instructions allowing you to complete your registration. Registered users simply go to www.openleads.com, and sign in.

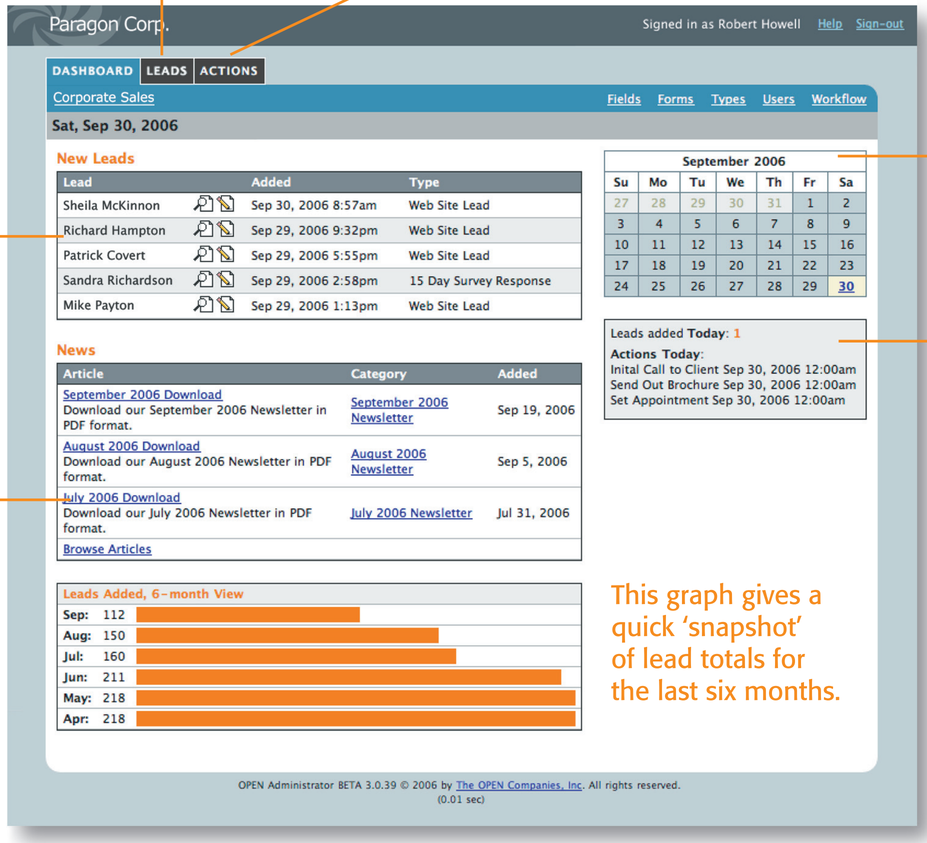
1 THE DASHBOARD

Click this tab to see ALL your leads.

Click this tab to see ALL Completed and Active actions. Actions are things you need to do in working the lead.

These are the leads added since the last time you signed in. Clicking on the magnifying glass icon allows you to see the lead details; clicking on the pencil icon allows you to edit the information.

Links to articles or marketing materials show up here.



The calendar feature shows dates on which actions are due to be completed. Click on any date for that day's list of actions.

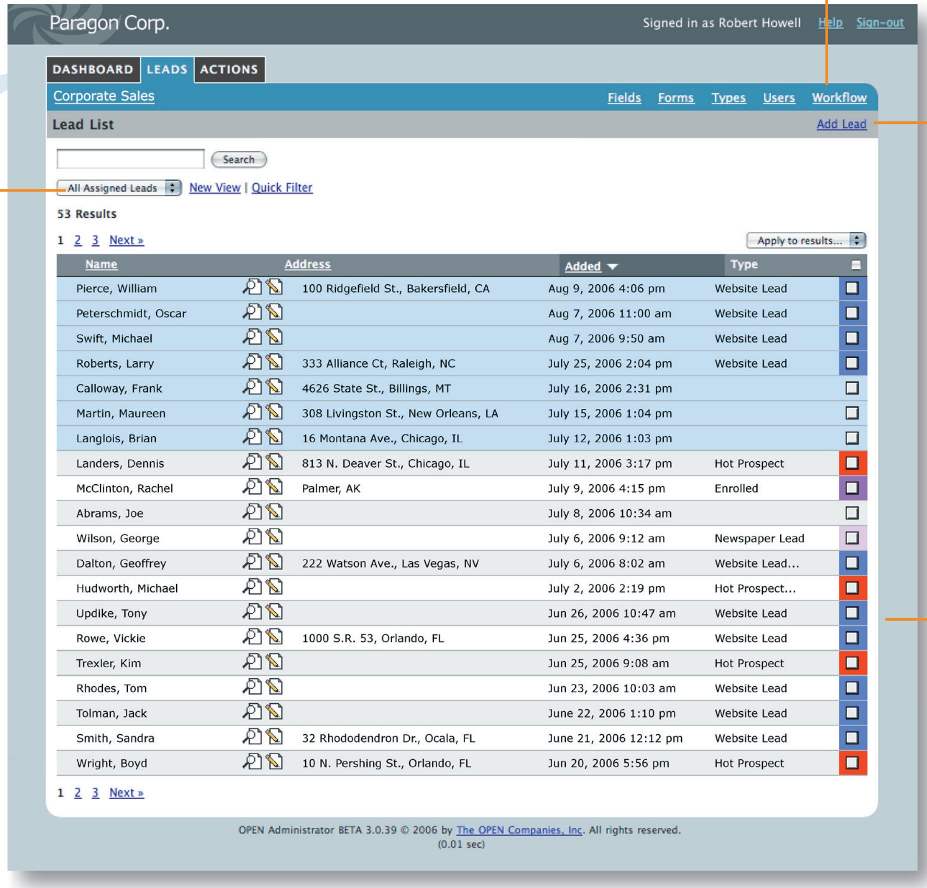
This is 'Today's' box. It keeps a running tally of leads added, and lets you know what actions are due.

This graph gives a quick 'snapshot' of lead totals for the last six months.

2 THE LEAD LIST

The blue menu bar shows links to administrative-level functions. Admin users will see the ones shown here: Fields, Forms, Types, Users, and Workflow. Other users will see links to those functions for which they have permission.

The way the lead information is displayed on the screen constitutes a 'view.' You can change the view by choosing which fields (such as name, company, email, and the like) should display. You can also change each different view, and toggle between them by choosing a view from the pull-down menu.



Links in the gray menu bar show what you can do directly from this screen. These are 'context-sensitive,' and change from one screen to another.

Leads are color-coded by type. Select leads by checking the box, then apply actions from the pull-down menu above.

Icons in Leads 3

VIEW …view lead info in read-only mode.

EDIT …change the content of the lead.

DELETE …permanently remove data.

DUPLICATE …make a copy of the lead.

MOVE …change the order of items in a list.

COMPLETE …finish an Action.