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Getting Started Guide

A practical guide to setting up your Mothernode CRM Account

Getting Started Guide

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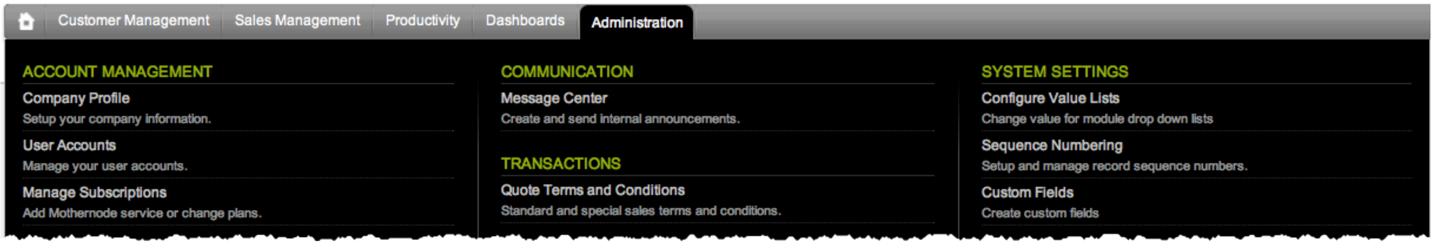
A quick guide to help you fine-tune your Mothernode CRM Account



Make the most of your experience by configuring your Mothernode Account.
Access your Administration Control Panel at anytime to get started.

☐ Less than 2 minutes

Manage Your Subscription

Growing? Downsizing? Or just wanting to use the shiny new credit card you received in the mail? You can make all of the adjustments to your payment method and number of active subscribers you need at any time by visiting the Manage Subscriptions section.

Edit your subscription information

- ✓ Add subscriptions
- ✓ Remove subscriptions
- ✓ Update credit card information

☐ Less than 2 minutes

Setup Company Profile

If you registered your account online you've already started this process by adding the basic information required. Take a few seconds to complete the rest of your company profile, which includes adding your billing and shipping information, and uploading your company logo.

Edit your company profile

- ✓ Upload your logo
- ✓ Change your billing address
- ✓ Set your SMTP information

☐ Less than 2 minutes

User Accounts

Need to add more users? You can add as many as you like, edit existing user information, disable accounts or delete users entirely. When you add a new user be sure to dispatch their login information to them. This will let them confirm their account and choose their own password. Go to the Manage Subscriptions screen to add more user accounts if you need to add users.

Manage your user accounts

- ✓ Add and manage user accounts
- ✓ Send users their passwords
- ✓ Set user monthly sales goals

☐ Less than 10 minutes

Setup Value Lists

Mothernode lets you customize your configurations in many of the drop-down list or options available in various records throughout the application. Consider configuring value lists to include standard options that adhere to your internal process or industry.

Setup record options and selections

- ✓ Customize your drop-down lists
- ✓ Configure options that match your processes and industry

☐ Less than 5 minutes

System Defaults

Creating new records, like customers and contacts, is fast and easy. But Mothernode *system defaults* make adding information even faster by auto filling your most common selections when creating new records.

Apply your most common defaults

- ✓ Assign default choices for new customer records
- ✓ Set your most common preferences

☐ Less than 10 minutes

Custom Fields

Mothernode allows you to make custom fields in each of its modules. You can make multiple choice lists, checkboxes, paragraphs, and even date fields. But before you consider creating some custom fields you should determine whether or not you need them. Acclimate yourself to Mothernode before adding custom fields.

Add your own fields

- ✓ Create custom fields
- ✓ Add fields to correspond with your business needs

☐ Less than 15 minutes

Terms and Conditions

Plan on using Quotes? Good, then you'll want to add your common and even uncommon terms and conditions. Select the default terms and conditions that will typically appear on of all your quotes.

Setup your terms and conditions

- ✓ Create terms and conditions for quotes
- ✓ Add conditions for special circumstances

Sales Process Flow

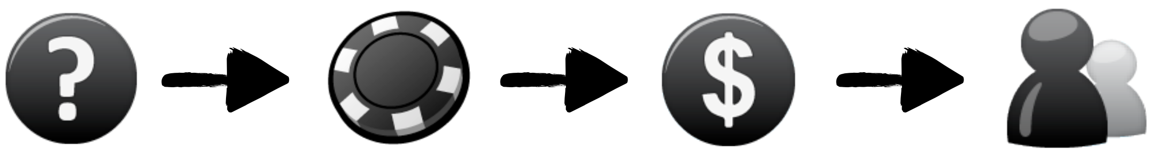
Maximize your potential using your Mothernode Account

Sales Process Overview

Regardless of your business industry, size or annual revenue, everyone relies on the same core business components; sales and customers. Mothernode adheres to world-class sales processes that are proven to help you effectively manage your sales process and increase your conversion ratio, converting more prospects into real customers. Because not every sale is the same, it may not start at the same place in the sales process. New business may begin as a lead, while existing customers may begin as an opportunity with a quote. That's why Mothernode CRM offers you the agility you need to progress the sale, no matter the situation.

1. Developing New Business

Mothernode follows this process when developing a new business relationship. While most occasions start as leads they do sometimes begin in the opportunity stage. This is the most common process when prospecting new business.



Lead

Your new leads are unqualified business opportunities that have the potential of becoming new business. New leads may come in the form of an inquiry, request for more info from your website, referral or other sources.

Opportunity

An Opportunity is a qualified lead that has expressed interest in your products or services and the possibility of doing business with you. It's during this process that the needs are defined, the relationship is built and trust is established.

Quote

Once the opportunity expresses interest in doing business with you, the quoting process is used to present them with an official proposal that addresses their overall needs and requirements.

Customer

When the quote is won, the the opportunity becomes a customer and is removed from the sales pipeline. From this point forward the sale begins the process of being executed, delivered and invoiced.

2. Selling to Existing Customers

Mothernode follows the opportunity process when developing an existing relationship. Opportunities are generally new sales possibilities within an existing customer account.

Customer

When the quote is won, then the opportunity becomes a customer and is removed from the sales pipeline. From this point forward the sale begins the process of being executed, delivered and invoiced.

Opportunity

An Opportunity is a qualified lead that has expressed interest in your products or services and the possibility of doing business with you. It's during this process that the needs are defined, the relationship is built and trust is established.

Quote

Once the opportunity expresses interest in doing business with you, the quoting process is used to present them with an official proposal that addresses their overall needs and requirements.

Sales: Best Practices

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Fine-tune your Sales Processes and generate the results you want every time

1. Prospecting

Business development begins with looking for or attracting new customers. Depending on your business model, you can cultivate business in a variety of ways that will develop leads and opportunities.

- Advertising
- Cold Calling
- Direct Mail
- Email Marketing
- Existing Customers
- Inbound Marketing
- Referrals
- Resellers or Distributors
- Search Engines
- Social Media
- Special Events
- Tradeshows

2. Qualification

This is the first critical step in determining whether or not your are the right fit for a prospect and they are the right fit for you. The qualification stage will determine if a business opportunity actually exists. Consider this customer due diligence. Asking the wrong questions can mis-qualify an opportunity and asking too few questions may not properly uncover a great opportunity.

Questions you should ask

- Identify the source of the need
- What other solutions have they looked at?
- Who is the decision maker?
- What is the budget?
- What is the scope of work?
- Does your product or solution fit the need?
- What is their buying stage? (Shopping/Ready to buy)
- When will they buy?
- Which products or services are the best fit?
- What other problems can you assist with?

3. Relationship Building (Trust)

More often than not, sales are not always immediate and take time. This is where YOU should take the time to deliver value to your prospect and demonstrate to them the type of commitment you make to your customers and what they can expect from you above and beyond the typical sale.

- Share information
- Present case studies
- Stay in front of them (ticklers + marketing)
- Become an authority in your industry
- Ignite interest

4. Presentation & Persuasion

If you've listened to your prospect throughout the sales process so far and you understand their needs, then you can effectively communicate and present your solution and make them understand how it will benefit their organizational challenges. This is a critical juncture where you will need to 'walk the walk'.

- Demonstrate benefits
- Highlight competitive advantages
- Empathize with your prospect's need
- Educate your prospect
- Build motivation to move forward

5. Pre-close

This is the beginning of the end. Polish the sale and determine the loose ends. Make the necessary advancements to push the sale across the finish line.

- Get approval to move forward
- Get a written agreement to move forward
- Make additional concessions that you can fulfill
- Ask closing questions

6. Overcoming Objections

Get ready for them, they are bound to be around the corner. Your prospect may want to buy, but they don't like to be sold. Sometimes it's a slam dunk and other times they may not be comfortable and need more information.

- Ask questions, never assume
- Listen carefully and feedback what you heard
- Address the objection

7. Close

This is the end of the sales process. This is where you transition you prospect to a customer and do so by making good on your commitments to them. This process should be easy and professional. It should paint a positive picture of your business and customer loyalty and prove to your prospect they made the right decision in choosing you to fulfill their solution.

- Ask for the sale
- Simplify the buying process
- Prepare to negotiate final terms
- Eliminate fear and uncertainty
- Eliminate buyer's remorse

7. Account Maintenance

Now that you've won the sale you have to make good on all of your promises, including the one about servicing your customers. They trusted you and that means you need to deliver throughout the life of your relationship.

- Delivery and fulfillment
- Customer service and support
- Resolve new or outstanding issues promptly
- Stay in touch with them
- Add them to marketing lists
- Survey their experience (demonstrate your commitment to quality)

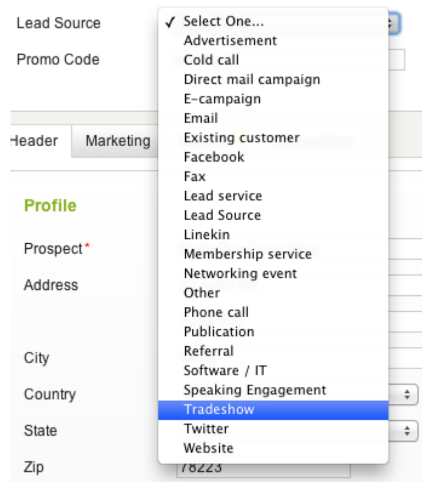
Configuring your Account

Configure Mothernode to work for your users, business and industry

The are many different things you can do to configure Mothernode to work for your business and your industry. The most prominent feature is the use of value lists. Value lists are selections and choices that users make throughout the application that help define record details. Drop-down lists are used instead of fields to ensure accuracy for reporting purposes.

Why use value lists?

Whether you're searching on screen or creating reports, value lists ensure consistent results by preventing users from making errors when entering data. For example, when running a report that will show how many leads came from a tradeshow, a value list is used as opposed to an arbitrary field. This prevents inconsistent entries and errors that users could make when entering data, in this case typing tradeshow, trade-show, trade show or even misspellings like tade-show. Inaccuracies will skew reporting on the tradeshows. The same principles could be applied in other areas, like country; United States, USA, US or states; Texas vs. TX.



leads and opportunities; selecting lead source: tradeshow.

is for value lists we highly recommend you setup BEFORE you begin using Mothernode

USER ACCOUNTS

Departments
Each user is assigned to a Department. Add and modify the list of departments available in your company. Some departments such as Accounting and Sales give users access to special features related to those roles. You should enter the most common "Departments" in your company and use the "Other Departments" field in the user accounts for future rare positions.

Titles
Each user is required to have a Title. Transactions such as Quotes and Orders will often include the users title when adding their name to a document. You should enter the most common titles in your company and use the "Other Title" field in the user accounts for future rare positions.

CUSTOMERS & CONTACTS

Lead Times
"Lead Times" are available in Quotes and Orders (on screen and in print) and communicate to your customers how long it will take to fulfill their orders. Depending on your business, you may have several Lead Time options to account for a variety of Products and Services. Lead Times are best communicated in ranges such as 1-2 weeks, 2-3 weeks, etc.

Quote Type
Use the "Quote Type" to categorize your Quotes. Classifying Quotes differently can provide a good visual reference to the type of pricing situation. For example, a BID would indicate that the customer will be receiving multiple quotes from competing companies.

Ship Methods
Each Quote and Order requires a method of shipment that lets each customer know how they will receive their products and services. Most common ship methods are with carriers such as FEDEX or UPS, however, depending on your business you can also include options such as Installed or Electronic.

File Categories
When uploading files to your Mothernode account, you can tag them with a File Category. Depending on the needs of your business, you can assign various categories for ease of identifying and filtering. Some suggested categories could be Contracts, Artwork, RFPs, etc.

Products and Service
Mothernode keeps services separate from inventory. You can categorize your services and group your offerings for reporting purposes. KPIs and reports will display the sale revenue generated within the categories.

Unit types
Products and services typically depend on "Unit Types" that communicate the quantity of a unit purchased. This is commonly known as Unit of Measurement (UOM). Products may have UOMs of; each, lot, dozen, etc., while services could have; hours, days, trips, etc.

Payment Terms
"Payment Terms" are used in variety of transactions such as Quotes and Orders; to communicate the expectation of payments to the customer. Different classes of customers or products may be assigned different payment terms. Some examples of payment terms would be Net 30, COD or Net 30 + 1/2 Deposit.

Deposit Requirements
In instances where deposits are applicable to orders, users can use the "Deposit Required" field to communicate an amount due upon signing before the order process can commence.

Hold Notices
Users are restricted from creating transactions for customers that are on hold. "Hold Notices" are used to communicate information about why the client is on hold. Some examples of hold notices would be; Past Due Payments, Payment Dispute or Delinquent Payments. THE DEFAULT STATUS MUST BE "OK" for any transaction to be created.

Market Segments
Assign "Market Segments" to customers and/or transactions and track where your sales activity occurs. Examples would be Healthcare, Education, Urban, Northeast or Southwest.

Source
Use the "Source" list to track where your lead and customer activity are coming from. This will help you determine where to best focus your sales efforts. Some examples of sources are: Magazine Ad, Lead Service, Networking Event, etc.

Groups
You can use "Groups" to establish categories for your customers. This will help separate customers for filtering and reporting purposes. For example, you can make groups for different classifications of customers, such as Preferred Customer Status or Platinum Customers.

Relationships
You can categorize your "Relationship" with each customer. This offers an additional filter you can use to manage your customer database and track revenue sources. Examples of different types of relationships would be End-Users, Partners, Distributors, Wholesale, etc.

Roles
Use "Roles" to define your contacts position in their company. This not just a department or title, but rather who they are relative your relationship to them. Examples would be; Decision Maker, Buyer, Influencer, etc.

FOB
Freight on Board (FOB) is used in quotes and orders to communicate the delivery destination for each particular order. Typically, FOB is limited to Shipping Point or Shipping Destination, but you can add to this list if needed.

Pricing Level
This describes the pricing level of the inventory item.

LEADS AND OPPORTUNITIES

Collateral requested
For businesses that have a library of marketing materials that they typically distribute to inquiring customers or leads and opportunities, the "Collateral Requested" list lets you inventory those items. Examples could be; Fall Catalog, Course Overview, Product Catalog or Price List.

Topics of interest
Companies that offer a variety of services or expertise can list them in "Topics of Interest". This communicates the interest of new prospects and allows Sales Reps to follow-up with leads according to their needs. Topics of interest could include Product Availability, Scope of Service or Service Coverage.

Competitors
Mothernode lets you list your most common "Competitors" so you can keep track of who you run up against. We recommend you populate this list with up to 10 competitors.

Project Phase (Buying Stage)
Leads and Opportunities can be tagged in different "Phases" so that you know the maturity of each project. Understanding phases can help you craft your approach with a customer. Example phases would be; Planning, Discussions, Development, etc.

Selling Stage
Leads and Opportunities can be tagged in different "Stages" so you know where each prospect is in the buying process. Understanding stages can help you craft your approach with the customer. Example stages would be; Discovery, Analysis, Negotiation, Buying, etc.

Opportunity Type
There are different types of leads that may help categorize criteria for a contact. You can classify leads as Referrals, Cold Call, Existing Client, etc.

Value Lists

Let Mothernode work the way you do

... LEADS AND OPPORTUNITIES

Action Type
Each Lead and Opportunity requires some sort of action to pursue it. "Action Type" defines the next step actions that must be taken in order to further advance the sale. Some examples of actions are; Meetings, Submit RFP, Make Call or Setup Appointments.

Territory
Territory is used to classify the territory of Records.

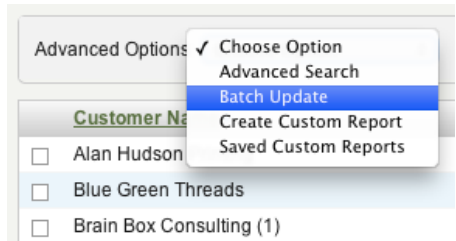
CAMPAIGNS

Campaign Type
Mothernode allows you to take control of your campaigns by creating and tracking different "Types" of marketing campaigns as well as managing the user list that goes along with them; You can create lists for; email, post card, or quarterly campaigns.

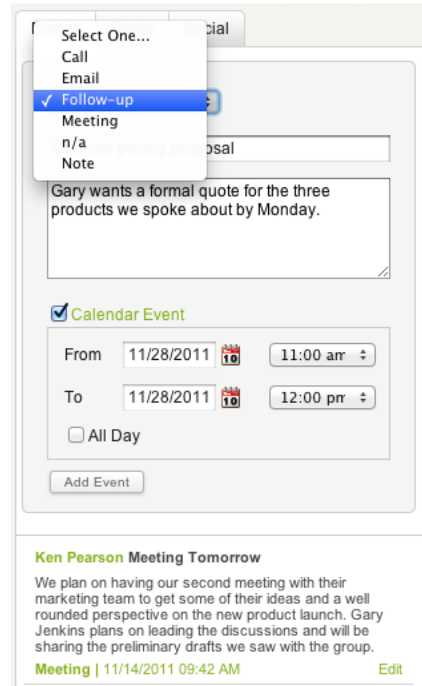
List Category
Mothernode lets you categorize your List so you can quickly identify members, groups of lists sources.

Make it your own
Mothernode includes its own default value lists right out of the box so you can get started immediately. For best results, you should adjust your value lists sooner rather than later to make the most of your Mothernode experience and to make sure your records are continuously consistent.

Adding or modifying value lists 'later' rather than sooner
Historical values in existing records are not automatically updated when new or changed values are added to make sure record history is preserved. If you want to make changes to previous values in specific records you should use the "batch update" function available in the advanced options in the relative record listing.

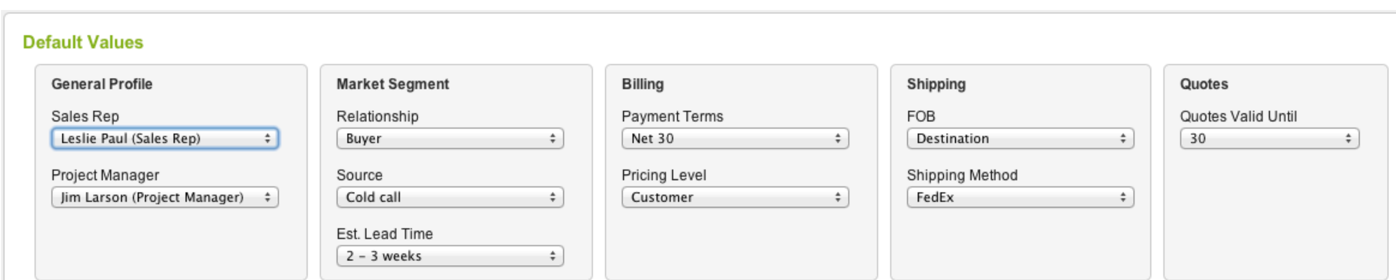


Plan before you begin
Personalize value lists to tailor Mothernode to adhere to your internal processes, policies and procedures. You can even consider incorporating existing options into your daily operations. Review the defaults and get inspired.



Applying your system defaults

As you begin to use your Mothernode Account you'll find that creating new records like customers, contacts and leads and opportunities is fast and easy. However, applying your system defaults can make theses processes even quicker. Mothernode system defaults let you assign values to your most common selections when creating new records. Using some or all of the system defaults is optional. Before you begin you should make sure to adjust the applicable value lists available in the system defaults to your liking. You can override all of these values at the record level at any time.



Sales Rep
For smaller organizations or individuals, you can automatically assign every new customer, lead and opportunity and contact to a designated user and make them the default sales rep.

Project Manager (Or Account Manager)
As with the sales rep default, smaller organizations can assign a default person as a PM on each new record. You can assign the same user as the default SR or PM.

Relationship
If you typically deal with the same relationship like buyers, distributors or end-users, you can set your most common relationship

Source
Source defines where the lead has come from. If you have one source that is dominant over all others, like cold-calls or referral, you can set it as your default.

Est. Lead Time
Lead times are used to note your standard delivery times from quote to fulfillment. While your lead times may be consistent you may have some circumstances that warrant longer lead times; such as distance or volume. Set your typical lead times as your default.

Payment Terms
Set your standard payment terms for your customers, like net 30, as a default setting and apply your special payment terms to applicable customers, like deposit required or COD.

Pricing Level
If you have different types of buyers (defined in relationships) and you offer different pricing levels, then you would set your pricing level default to match that of your *default relationship*.

FOB
Depending on your business, services and/or industry you may have one or more FOB option, like shipping point or destination. Set your most common FOB as your default.

Shipping Method
You may have several courier accounts, like FedEx, USPS or UPS. You should set your preferred carrier as your default.

Quotes Valid Until
Most quotes may be valid for 30 days, and that is most likely a good reason to make this option as your default. You can always give customers their own unique set of terms at the record level.

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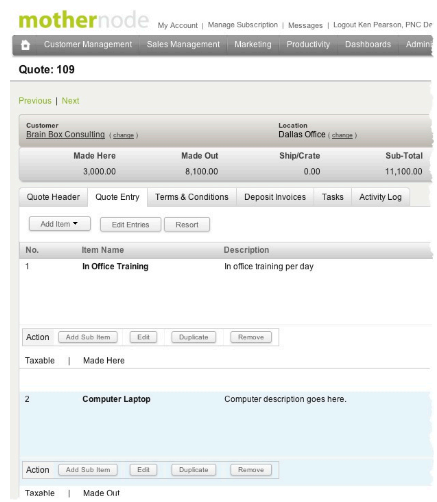
Making quotes even easier to create

Deciding to use quotes? Good idea. Mothernode CRM delivers a full service quoting suite that delivers professional quotes in minutes. Unlike most other CRMs, Mothernode gives users a variety of powerful quoting options that traditionally are only available in ERP (Enterprise Resources Planning) software. If you plan to use quotes, then you will want to setup supporting configurations to help produce quotes quickly and easily.



Setup Actions

These are areas of setup you will need to attend to make the most of your quoting process.

Value lists
These will be used to tag and categorize your quotes accordingly.

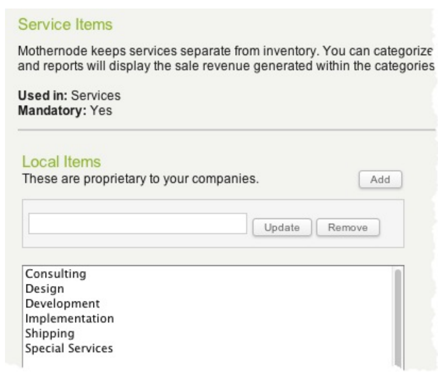
Products and Services
Adding service items will let you quickly add preset line items to your quotes.

Terms and Conditions
Are optional ordering policies you can add to your quote.

Value Lists

The following value lists are used in quotes, but may also be available in other Mothernode CRM Modules. Consider configuring these modules before creating quotes. Most of these value list will be inherited from their parent record, like the customer or the lead and opportunity the quote was create for, but you can override them at the quote level. See the section on value lists for more information about these value lists.

Products & Services	Lead Times	Quote Type
Unit Types	Payment Terms	Ship Methods
Deposit Requirements	Market Segments	FOB
Ship Methods		



Create categories for your service items

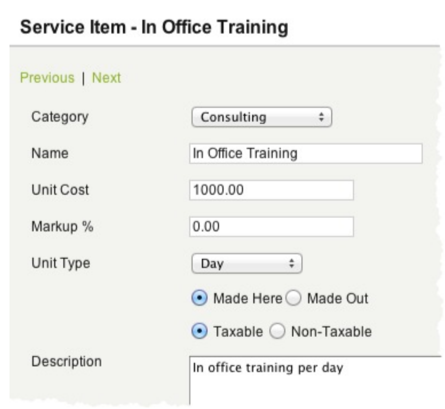
Products & Services

Products and Services are predefined line items that you offer. You can categorize your goods and services, add descriptions, costs, markups and much more. And you can determine which services should always be added when new quotes are created. Each of the variables in the item can be adjusted in the quote record to meet the customer's needs. Adding a library of offerings makes building your quotes a snap, every time.

Products and Service Value List
Before you setup your goods, you need to assign the item categories in the value lists section. The 'products and services' value list will represent the categories of types of items you offer. The items you create will be filed under those categories. Thinks of the category as a kind of 'folder' you would file corresponding items in.

Properties
These fields are used in each service item record.

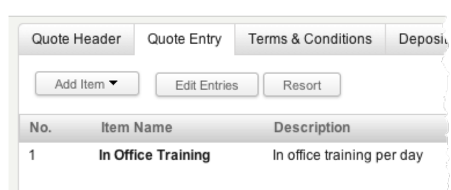
Categories – Assigns a service item to a category. Service categories are setup in the value lists
Name – Gives your service a unique name that differentiates it from other services
Unit Cost – is the base cost for the service
Markup % – is the standard price increase you add to your items to make a profit
Unit Type – is the unit of measurement (UOM), which the item is sold in; each, hours, lbs, etc.
Made Here/Made Out- determines whether the service is bought out or provided as an in-house product
Taxable/Non-Taxable – determines whether or not the item should be exempt from tax calculations
Description – a description of the product or service you are offering



Add or manage your service items

Adding Products and Services

You can add service items to quotes in the 'quote entry' tab, by clicking the add button.



Add a new line item

Terms and Conditions

Everyone has a set of conditions a customer will need to understand and agree to when ordering from you, that's why Mothernode CRM let's you file those policies in the Terms and Conditions module. Mothernode already understands that not all terms and conditions are relevant to every order and you may have some unique requests. That's why you can stock as many of your T&Cs as you need to and select which ones should be assigned as defaults for each new quote.

FAQs About Your Accounts

*Some FAQs may not be applicable with certain promotions

Q: What if I want to add new users and increase my number of subscribers?
A: You will first need to modify your subscription to include the number of subscribers you want to add. You can do this in the Manage Subscription screen. After you've made that change go to the User Account module where you can create the new user accounts.

Q: What if I want to remove users and downsize my subscribers?
A: Delete the user account(s) you want to close first from the User Accounts module. Then, in the Manage Subscriptions, screen remove the corresponding quantity of users.

Q: Can I reassign a user account (or seat) to another person if someone leaves my company?
A: Yes. After the previous employee has left, you can repurpose their account by updating their record with the new user's information. Be sure to update their login email address and dispatch their invite so they can choose new password for the account.

Q: If I repurpose an existing account to a new user can the old user still access that account?
A: No. As long as you changed the login name and a new password is used.

Q: Can we share an account? Why do I need multiple users?
A: You can only share an account if you will not be logged into Mothernode at the same time. Mothernode will not allow simultaneous sessions with the same user account.

Q: Can I cancel my account at any time?
A: Yes. Just note that if you've subscribed for a monthly subscription you will pay for the entire month. If you've subscribed for a year your account will remain active until the subscription has expired. There are no refunds for paid subscriptions.

Q: What happens to my data after I cancel?
A: Your Mothernode CRM subscription will remain inactive for 3 months after you close your account. This gives you the opportunity to return to where you left off if you choose to resume your account. It's also a precaution in the event your account was closed unintentionally.

Q: Who can manage subscriptions for my account?
A: Any user with administrative privileges can manage subscriptions.

Q: Can I export my data?
A: Yes. Every record in every module is exportable to Microsoft Excel.

Q: Can I import records like customers and contacts?
A: Yes. We recommend you thoroughly review the documentation that outlines the import process for the best results.

Q: How do I assign a password for a new user?
A: For security reasons each user is responsible for selecting their own password. In their user account profile click the *dispatch user login* and they will receive instructions in their email to create a new password. They can modify this in their account later on as well.

Q: What happens if I cannot remember my password to login?
A: You can retrieve your password at the login screen be clicking the *forgot password* tag. Mothernode will send you an email with instructions on how to access your account. Or an administrator can re-dispatch your login to you.

Q: Can I make other users administrators?
A: Yes. You can make as many users administrators as you want to by tagging the user as an Administrator in their User Account profile. Just remember, all Administrators have access to make modifications to any application setting and also have the ability to cancel accounts.

Everyone can use a little help sometimes.

1-800-928-6055 or **support@mothernode.com**

View Our Tutorials
Get started by watching helpful tutorials. Check our YouTube channel for Mothernode CRM 'How to'
http://tinyurl.com/d36fdzs

Glossary of Fields

Account ID
Unique account identifier given to customer records.

Account Team
One or more individuals designated as sales and service agents to a customer and/or locations.

Active (Customer)
A tag used to identify customers who have recent and current transactions. Active = No is used to classify dormant customers.

Assigned To
Indicates who a lead or opportunity is assigned to. You can reassign to someone else. This is a required field and will also be used in the process of dispatching a lead or opportunity.

Associate Contact
A third-party contact you want to associate with one of your existing customers.

Bid Date (Time)
A deadline that the proposal is due for a specific lead or opportunity.

Billing Address
The customers designated billing address and contacts.

Buying Stage
An indication of where the prospect is during their buying stage, such as 'shopping' or deciding.

Check No.
The number of the check from your customer that was used to issue a deposit on a quote.

Client Since
When the customer first became a client. This is automatically set for new records.

Contact Owner
This is the sales rep or user who owns the relationship with the contact.

Customer Contact
One or more individuals who represent the customer company or who are the customer themselves.

Customer Satisfaction Recipient
Determines whether or not the contact should be the one who received any customer satisfaction services.

D&B Number
Customers Dun & Bradstreet number (if applicable).

Decision Maker
Indicates if the contact is a decision maker for the customer.

Deposit Received
The amount of money received for the deposit.

Deposit Required
The necessary deposit required to initiate an order.

Discount
Refers to any price reductions offered in the quote in a line item or for the entire quote.

Do Not Call
Indicates the contact does not wish to be contacted via telephone.

Est. Close Date (Quote)
Indicates a relative timeframe the prospect will make a decision to execute a purchase.

Est. Close Date (Lead/Opportunity)
Indicates the relative timeframe the prospect intends to make a buying decision.

Est. Invoice Date
Helps forecast possible dates an invoice will be issued for the sale.

Event
An activity that is recorded to demonstrate progress, actions or notes that coincide with a contact, customer or lead and opportunity.

Exclude from Lists
Indicates the contact would like to be excluded from any marketing lists.

Extended Price
Is a calculation of number of units X unit cost + markups - Discounts to determine the sale price of a good or service in a line item.

FOB
Freight on board used to determine the shipping point.

Group
Used to classify a user

Lead Description
A general description used to summarize a lead or opportunity.

Lead Priority
A priority used to determine the urgency of the lead or opportunity

Lead Source (or source)
Indicates where the lead originated from.

Lead Times
Indicates the time it will take to fulfill the entire order.

Location
Represents a physical location, division or separate office for a customer record. Multiple locations are file under one record.

Made Out
Defines a product or service that is bought out, purchased from a third-party vendor for resale.

Market Segment
Represents the industry a customer is in.

Marketing Campaign Recipient
Indicates whether or not the contact should be added to any marketing campaigns.

Markup
The extended price added to the unit cost of a good to make a profit.

Next Steps
Notes the what the next sales steps are in the process.

Opportunity Type
Classifies the type of opportunity.

Opportunity Value
The estimated value of revenue predicated from a successful sale to an opportunity.

Other Address
Allows for a fourth address for a customer, beyond the standard billing and shipping.

Payment Terms
Conditions of payment applied to the sale. This can vary by customer.

Potential Value
The overall long term potential revenue opportunity from future sales to a prospect.

Pricing Level
Indicates standard or favorable pricing to a customer.

Probability
Indicates the probability the sales will be a success.

Product and Service Category
A parent category used to group several similar services, like Shipping or Consulting.

Profile Address
The primary street address for a customer. This is the default address and can also be assigned to the shipping and billing address if they're the same.

Project Manager
The person responsible for fulfilling the order and servicing the account after the sale.

Promo Code
A promotional code used to measure the success of a campaign or source of a lead.

Prospect
The name of the company or person your lead or opportunity is for.

Quantity
The number of UOM purchased.

Quote Type
Is used to classify a quote and type of sale, i.e. bid, proposal, normal, etc.

Reference (Quote)
An identification used to summarize the contents or purpose of the quote.

Relationship
A classification that defines the contact's relationship with your company.

Responsibility
The user's responsibility within their organization.

Sales Rep
The individual ultimately responsible for the sale, assigned to a prospect or customer.

Selling Stage
The stage in which you have entered the sale process.

Ship Method
Used to define how the goods or services will be delivered to the customer.

Shipping Address
The customer or contact address where all goods and services should be delivered.

Task
A single action or list of actions that have been assigned to a user to be completed.

Tax Exempt
A customer identifier that indicates they should not be charged taxes.

Tax Rate
State, county or municipal taxes applied to each transaction.

Territory
Assigns the lead or opportunity to a geographical sales territory.

Twitter
The customer's company or contact's twitter account.

Unit Cost
The base price for a single item (before Markup)

Working Title
A label or title used to summarize a lead or opportunity.

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Importing Records

IMPORTING: READ ME!

Before you import, read this section entirely and contact Mothernode if you have any questions

Know what you're importing! Read this section thoroughly to acclimate yourself with the importing process. First, we'll ask two simple questions that can break down the importing process.

1. What do you want to import?
2. Where do you need to import what you want to import?

Mothernode CRM let's you import records into three different modules in the application.

- ✓ Leads and Opportunities
- ✓ Customers
- ✓ Contacts

While that sounds simple enough, let's make sure that you understand how Mothernode interprets those records to ensure you import the right data into the correct module.

Leads and Opportunities

These are NOT your customers and NOT your contacts, at least not yet. While you can create opportunities for existing customers, the leads and opportunities module is used to house your new business activity.

Your leads and opportunities constitute prospective business possibilities that you are pursing or want to pursue in the sales process. This module is used to record activity, plan meetings and advanced the relationship toward a successful sale.

Customers

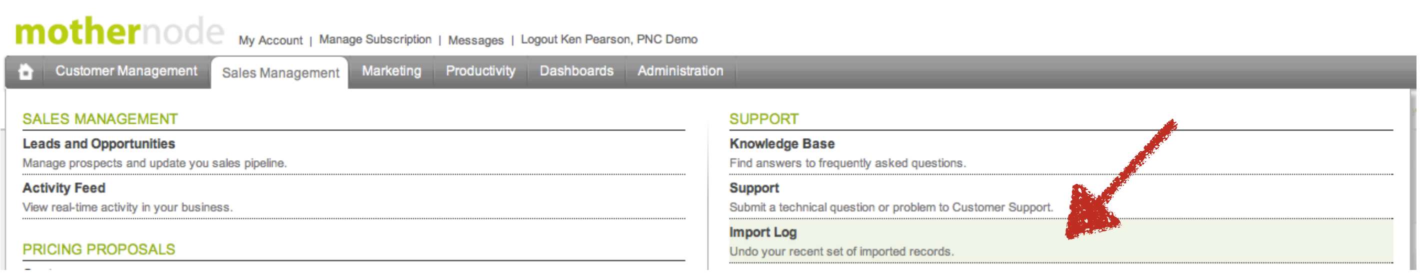
Your Mothernode accounts are the clients that you already do business with or have done business with in the past. These are the accounts that you currently service. Think of it this way; if they exist in your accounting software, then they're your customers.

Contacts

Your contacts can be attached to a lead and opportunity or can be attached to a customer. Contacts are 'people' that you transact with and leads, opportunities are the entities that they represent. Think of your contacts as one of the people you would see in Outlook (PC) or Address Book (Mac)

Undoing Imports

Nothing ever goes right the first time and that's why Mothernode gives you the ability to undo your previous imports. The import log is accessible from the main navigation, in both the customer management and sales manager tabs. You can preview the items that have been imported as well as execute the command to undo the import. Just remember that undoing a previous import is irreversible, and records in the import will be permanently be deleted.



Importing Records

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Learn how to import your data from existing sources into Mothernode CRM

Importing Customer and Contacts into Mothernode

One of the first things you'll want to do is import your existing customers and contacts into your Mothernode CRM. To do this, you'll need to export your customer and contact data from your existing CRM or database. See the user manual for your current software to find out how.

New to importing? Then keep reading, this guide will assist you in the process. Typically, you'll probably only do this once, but Mothernode makes the process easy enough if you plan on importing records on a regular basis. Here are a few helpful tips to get you started.

- For best results, download the **Mothernode Import Template** you need.
- You can only import an **XLS** file (NOT XLXS).
- T**he first row of the import is discarded** (this is usually the column titles).
- If you make a mistake, you can start again and undo your last import.
- Each field you are importing MUST be in its own column in Excel.

Importing Options

You have two options when it comes to importing your records. Use an existing template or use your own XLS file. Even if you use your own XLS file you can save your mapped fields during the import process and make your own template.

1. Use a Mothernode Template (Recommended)
2. Use an Excel file (you can make your own template)

Properly preparing your data for Import

No matter which of the above methods you use to import, you must map the fields from your existing data source to your destination data, Mothernode. This means each field has a 1:1 ratio.

Your Data Source		Mothernode
First Name	=	First Name
Last Name	=	Last Name
City	=	City

Sometimes your existing data source may NOT export fields into their own individual columns, and while it is rare, this could happen. If it does, you will need to split the columns manually or you can use the "Text to Column" function in Excel, although this may not always work and will depend on the information you are trying to split situation.

This is an example of a good file to import. Each field is in its own column.

	A	B	C	D	E	F	G	H
1	First Name	Last Name	Address 1	Address 2	City	State	Zip	Country
2	John	Smith	1234 Elm Street	Suite 200	Dallas	TX	74356	USA
3	Pam	Jones	5672 Oak Street	Suite 370	Irving	TX	78293	USA
4	Doug	Holden	728 Tree Street	Suite 100	Arlington	TX	78223	USA

This is an example of a bad file to import, because multiple fields are in one column.

	A	B	C	D
1	Name	Address		
2	John Smith	1234 Elm Street, Suite 200, Dallas, TX 74356, USA		
3	Pam Jones	5672 Oak Street, Suite 370, Irving, TX 78293, USA		
4	Doug Holden	728 Tree Street Suite 100, Arlington, TX 78223, USA		

Mothernode Import Process

We recommend you follow these steps for first time import. The basic process is outlined below, but if you are new to importing data you should review the additional information provided.

1 Getting Started

1. First, determine what information you will import and download the XLS template you need.

DOWNLOAD A TEMPLATE
Mothernode XLS Templates
- Leads and Opportunities
- Customers
- Contacts

2. **EXPORT YOUR CURRENT DATA**
You will also need to export your data from the existing CRM or datasource into a format that you can open in Excel, like CSV, TAB or XLS. Ask your software provider how.

Some Useful Advice!

Now is the time to start 'Fresh!' Do you really want to import all your Customers and Contacts into Mothernode? If not, clean-up your Excel file before you proceed with your import. Here are some things we recommend.

- Scan the customers you exported and complete any missing information
- Check for duplicates
- Purge old or unwanted records, like customers no longer in business
- Consider only importing customers you've done business with in recent years

2 Prepare Your Data

1. Once you've exported your customer or contact data from your accounting software or other CRM, open it in Excel.

SOURCE: Your existing data

	A	B	C	D
1	First Name	Last Name	Customer Name	Addres 1
2	Tom	Howard	Fossil Fules, Inc	1234 Oak Rd.
3	Kevin	Johnson	Broken Arrow Media	456 Elm Street
4	Sarah	Halen	Castlerock, Inc	897 Jefferson

Open the Mothernode Template you downloaded from Step 1. Both Excel files need to be open.

DESTINATION: Mothernode Template

	A	B	C	D
1	Customer Name	First Name	Last Name	Addres 1
2				
3				
4				

Copy and paste the corresponding columns from your source file to the destination file. Leave out the fields that are not available in either file.

2. **COPY, PASTE IN DESTINATION**

	A	B	C	D
1	First Name	Last Name	Customer Name	Addres 1
2	Tom	Howard	Fossil Fules, Inc	1234 Oak Rd.
3	Kevin	Johnson	Broken Arrow Media	456 Elm Street
4	Sarah	Halen	Castlerock, Inc	897 Jefferson

	A	B	C	D
1	Customer Name	First Name	Last Name	Addres 1
2	Fossil Fules, Inc	Tom	Howard	1234 Oak Rd.
3	Broken Arrow Media	Kevin	Johnson	456 Elm Street
4	Castlerock, Inc	Sarah	Halen	897 Jefferson

3. Save your new Destination File.

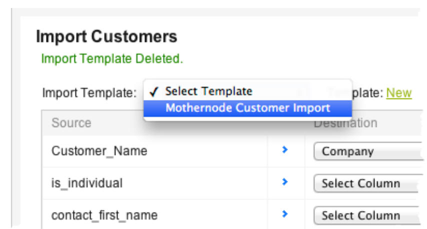
Some Useful Advice!

Complete as much information as you can! In this step, you will probably notice several columns in your Mothernode Import that you didn't have in your original file. You should take the time to fill in the empty columns (if you can provide the information) so it can be included in the import process. Remember, it's a lot quicker to make changes to the data in Excel than it is to the records after they've been imported.

3 Import Your XLS

Now that you've prepared your Import File, access the Import Screen to upload your Customers and Contacts. Before you do, here's what you can expect.

1. **SELECT YOUR IMPORT TEMPLATE**
Select Mothernode Customer Import from import template list. This will automatically map the field from your XLS file to Mothernode.



2. **REVIEW YOUR DATA**
You can review your data and how it is mapped in the right preview window. Be sure to check this before you begin your import.

Customer	Address_1	Address_2	City	State
Mothernode	8445 Freeport Parkway	Suite 100	Irving	TX

3. **IMPORT RECORDS**
When everything looks good, you can click the **Import Records** button to initiate the import process.

Some Useful Advice!

You're gonna be OK! Don't worry if you make a mistake, you've got options.

- If you make a mistake, you can undo your last import. This will clear out the records that you imported, preserving the rest.
- You can clear existing data before you import, directly from this screen. Just make sure to follow the instructions to backup your data

FAQs About Importing

Q: What file formats can I import?
A: You can only import XLS files. You can open TAB and CSV files in Excel, but you need to save them as XLS files.

Q: Can I undo an import if I make a mistake?
A: Yes, you can access the import log and undo recent imports. Just make sure you do so immediately before users begin working in those records.

Q: Should I use the Mothernode Import Template?
A: Yes, the import template will help you streamline your import process. Copy your data into the necessary column and save as an XLS.

Q: I often import from my business card scanner. Can I save my mapped fields so I don't have to do this every time?
A: Yes, once you map your fields for the first import, click the Make Template button and name your template accordingly. Next time you import from the same XLS file format select the template you saved and the fields will map accordingly

Q: What should I do with fields in my data that don't exist in the import template I am using?
A: Leave them out. Only use what is in the template. Other fields can be added later in the record.

Everyone can use a little help sometimes.

1-800-928-6055 or **support@mothernode.com**

View Our Tutorials
Get started by watching helpful tutorials. Check our YouTube channel for Mothernode CRM 'How to'
http://tinyurl.com/d36fdzs

TIPS FROM THE PROS!

STOP!!! We've given you the 'mechanical steps' on how to successfully import your records into Mothernode, but now for some practical tips that can make your experience a success right out of the gate! Live life with fewer regrets - read these!

Advice Worth Following

- Clean-up all of your data in your XLS file BEFORE you import anything into Mothernode.
- Before you import anything, try and complete as much of the data you are importing. For example, make sure that your customer addresses are complete, etc.
- Don't import hundreds of leads unless you have the resources to manage those! Start with a manageable amount, we recommend no more than 50.
- Spring clean! This is your opportunity to get rid of the garbage in your current database; customers and contacts you no longer do business with, etc.
- Think about who you want to import, everyone? In most cases not. Perhaps you want to consider customers and contacts you've done business with in the past 3 years.
- Use the Mothernode Import Templates to assist you in the import process.
- Your final Import File MUST be an XLS file, NOT an XLSX file.