redlienAccountExecutive
personal edition

Quick Start Guide

A Quick Guide for Redlien Account Executive

Contents

Getting Started with Redlien Account Executive

Thank you for using Redlien Account Executive, the premier Customer Relationship and Sales Account management application for Apple Macintosh OS X. Redlien Account Executive is extremely user-friendly, with an inviting and intuitive user interface and features that work with "common sense." Nonetheless, due to its depth of features and functions, this quick start guide will help you get going.

Starting Redlien Account Executive for the first time

The first time you start Redlien Account Executive (RAE), and after you accept the End User License Agreement, an initial preferences window will guide you through the basic settings required. These include your name and company information, default contacts folder, integration options with Apple's iCal and Address Book, and type of e-mail delivery you would like to use.

Setting your Initial Preferences

Setting your Default Contact Database location

The Default Contact Database location is the folder where your contact database will be stored. By default, this location is in your user directory's Document folder, and named "Account Executive." By clicking on the "Select Location" folder, you can choose another place to store your database if you want. The Database Name is optional, and allows you to name your database anything you like.

Publishing your Redlien Account Executive schedule to iCal

Redlien Account Executive allows you to publish your sales calendar with Apple's iCal. To publish to iCal, select the button "Publish to iCal Calendar". Once selected, you can choose which calendar to publish your RAE events to. If you like, you may also create a new calendar dedicated specifically to your RAE event data.

Importing and Synchronizing your contacts from Address Book

Redlien Account Executive can import, and synchronize with, your existing Apple Address Book contacts. To enable this, select the "Yes" button.

Synchronization of your Address Book and Redlien Account Executive data allows you to make updates to your Address Book contact from within Redlien Account Executive. Changes made to RAE contacts will be sent to Address Book. RAE will not delete any of your Address Book contacts, however. To enable this synchronization, select the "Sync Address Book to Redlien Account Executive data" checkbox.

Setting your e-mail preferences.

Redlien Account Executive can send e-mail using either Apple Mail.app, Microsoft Entourage, or directly from RAE. If you choose to send e-mail from Redlien Account Executive, you will need to enter your name, e-mail address and server information you wish to use.

If you chose to import your Address Book contacts, Redlien Account Executive will now import your contacts and open up the Main Window.

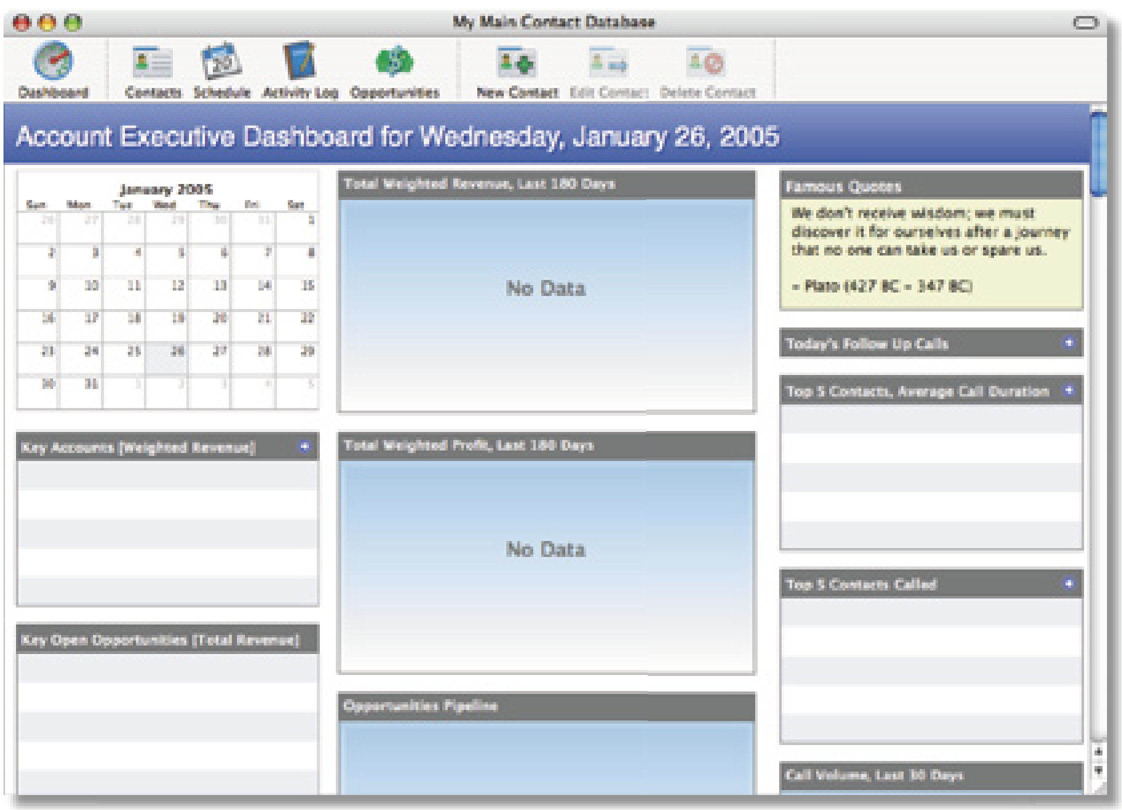
Navigating the Main Window

Redlien Account Executive's Main Window consists of five different sections, all designed to help you get the most out of your contact data. Dashboard, Contacts, Schedule, Activity Log and Opportunities.

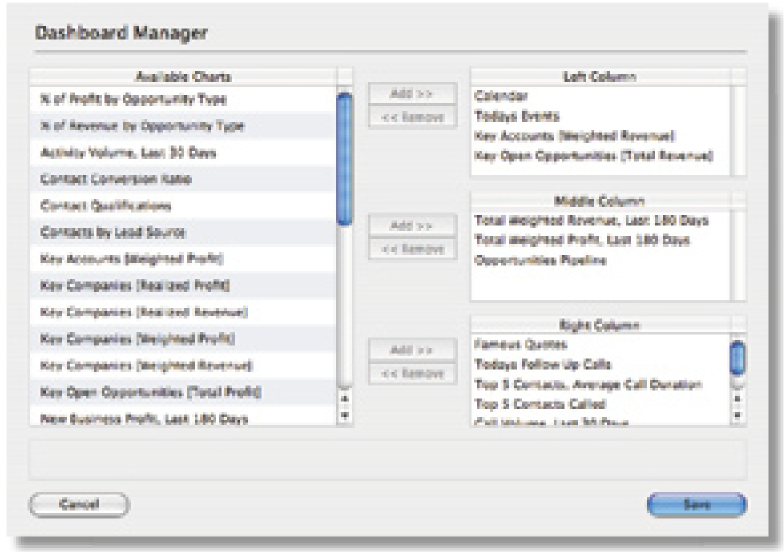
Dashboard View

The Dashboard view shows you what's happening with your contact database. With 37 different graphical components to choose from, you can customize this view to suit your particular interests. By default, The dashboard will show you:

- Monthly Calendar
- Key Account by Weighted Revenue
- Key Open Opportunities by Total Revenue
- Total Weighted Revenue in the last 180 days
- Total Weighted Profit in the last 180 days
- Opportunities Pipeline
- A random "Famous Quote"
- Today's follow up calls
- The top 5 contacts by their average call duration
- The top 5 contacts by amount that you call them
- Your call volume for the last 30 days.



You can change any of these components by either selecting (while in the Dashboard view) Tools > Dashboard Manager... from the menu, or by right-clicking anywhere on the dashboard itself.



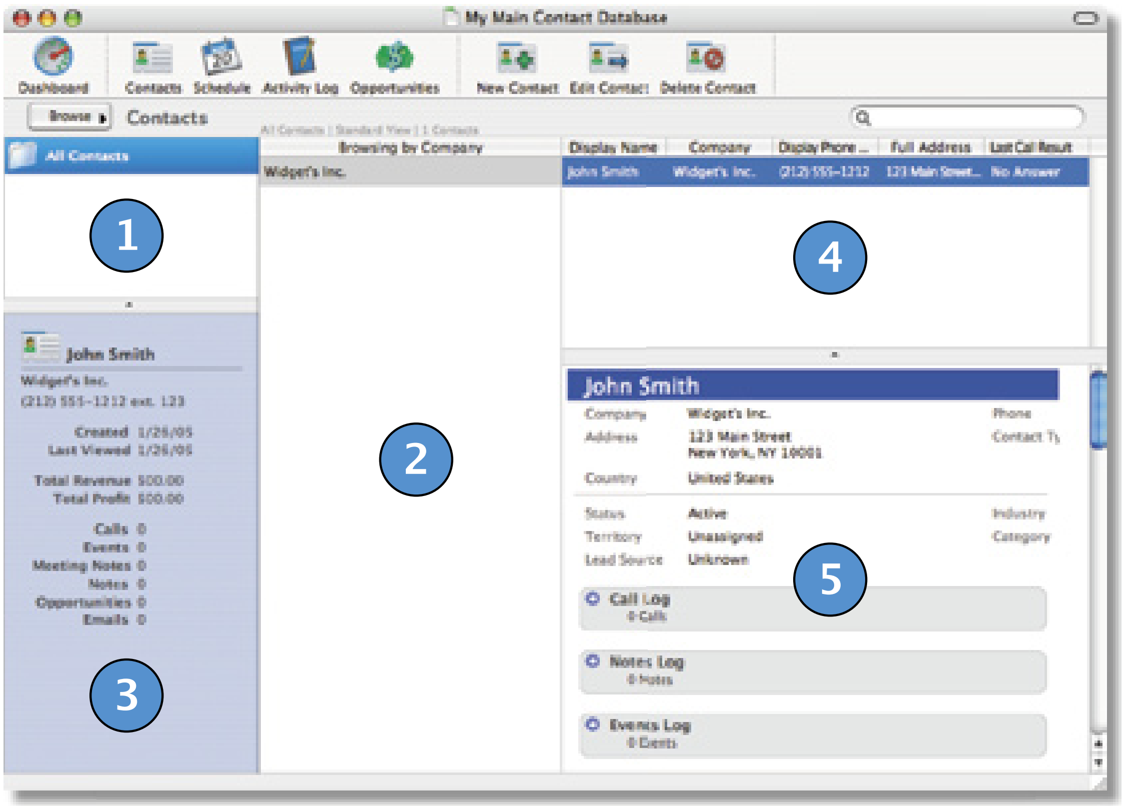
To add a Dashboard component, select one of the available components on the left hand side of the window, and click any one of the three “Add >>” buttons in the middle. To re-arrange how components will be displayed in their respective columns, select the component you wish to move in one of the right-hand listings, and drag it within its column to set its location. To remove a component from a column, select that component from one of the column listings on the right, and click the appropriate “Remove>>” button.

Available Dashboard Components:

- % of Profit by Opportunity Type (Chart)
- % of Revenue by Opportunity Type (Chart)
- Activity Volume, Last 30 Days (Chart)
- Contact Conversion Ratio (Chart)
- Contact Qualifications (Chart)
- Contacts by Lead Source (Chart)
- Key Account by Weighted Profit (List)
- Key Companies by Realized Profit
- Key Companies by Realized Revenue
- Key Companies by Weighted Profit
- Key Companies by Weighted Revenue
- Key Open Opportunities by Total Profit
- New Business Profit, last 180 Days
- Open Tasks
- Opportunities Pipeline by Probability
- Profit by Lead Source
- Profit by Territory
- Repeat Business Profit, Last 180 Days
- Repeat Business Revenue, Last 180 Days
- Revenue by Lead Source
- Revenue by Territory
- Top Selling Products
- Total Realized Profit, Last 180 Days
- Total Realized Revenue, Last 180 Days
- 30 Day Calendar
- Today’s Events
- Key Accounts by Weighted Revenue
- Key Open Opportunities by Total Revenue
- Total Weighted Revenue, Last 180 Days
- Total Weighted Profit, Last 180 Days
- Opportunities Pipeline
- Famous Quotes
- Today’s Follow Up Calls
- Top 5 Contacts by Average Call Duration
- Top 5 Contacts called
- Call Volume, Last 30 Days

Contacts View

Contacts view is your primary listing of the contact data stored in your database. Using the "View" menu, you can set various options like listing colors, contact icon, the columns of the list and more. This view is made up of 5 different sections which include a group listing, browser panel, info pane, contact listing and preview pane.



The Main Window Contact View showing an open Info Pane, Browser Panel and Preview Pane

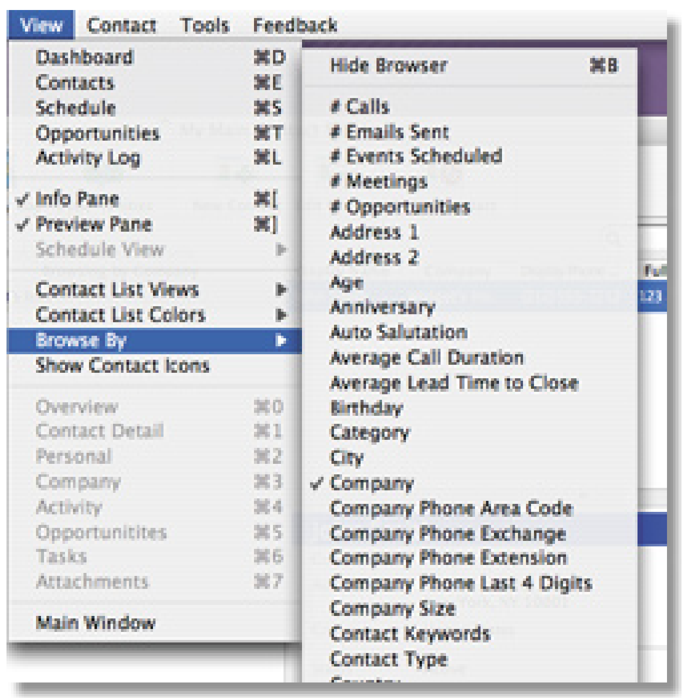
1. **Group Listing**
2. **Browser Panel**
3. **Info Pane**
4. **Contact Listing**
5. **Preview Pane**

Group Listing

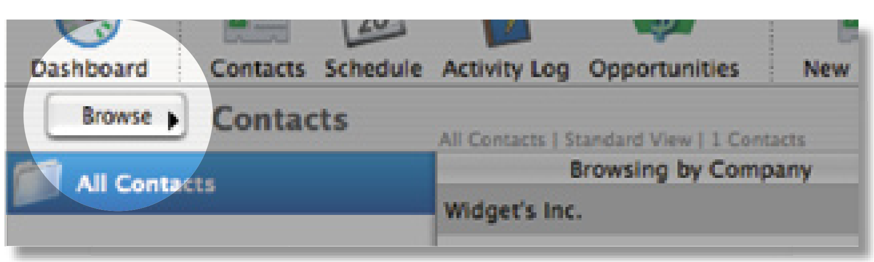
The group listing is always available to all views except dashboard. When you select a particular group within the listing, Redlien Account Executive filters all other data views (contact listing, schedule, activity log and opportunities) to use only the contacts within that group. You may edit your groups under the Edit menu.

Browser Panel

The browse panel is one of the more powerful features of Redlien Account Executive. Using this, you can filter your contacts (and their data) by any of 85 unique fields. Combined with the info and preview pane and a custom list view, you can easily see just about anything you wish to on a contact in a very easy and quick manner. Activate the browser panel by selecting a browse category from either the Browse button on the Main Window (except in Dashboard) or from the View > Browse By menu item. The browser panel is accessible from all Main Window views except Dashboard. When you select a browse category, all of the Main Window data is filtered accordingly. This includes your contact listing, schedule, activity log and opportunities. To close the browse panel, either double-click on a Group, right-click within the browse pane and select "Hide Browser" or use the View > Browse By > Hide Browser menu item.



Showing the Browse Panel available options.
85 fields to browse your contacts with!

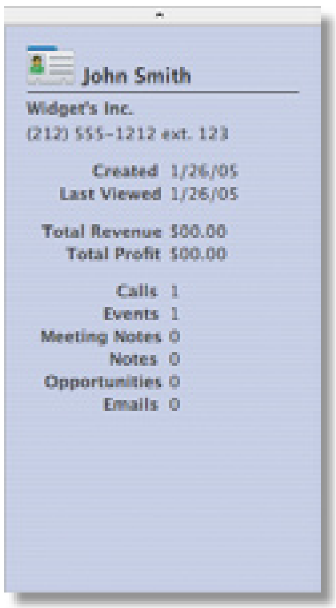


Use the "Browse" button at the top right of the Main Window to browse through all of your contacts however you like.

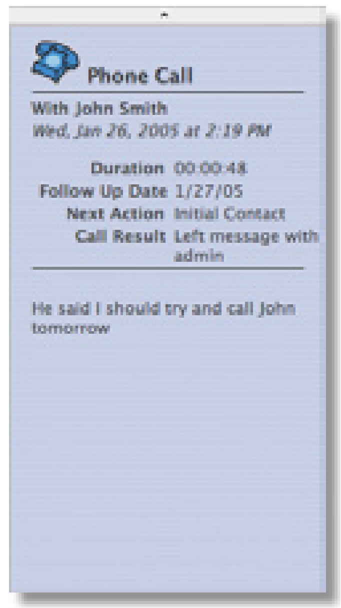
Info Pane

The info pane gives an overview of whatever item is selected in the right hand side of the Main Window. It can be opened either by clicking and dragging on the resize "dimple" at the bottom left of the main window, or by using the View > Info Pane menu item.

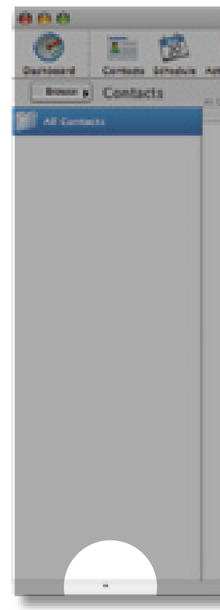
When you click on an item in the Main Window (i.e. contact, opportunity, etc.), Info Pane will show relevant data for that item This pane is available to all views except dashboard. Right-clicking on this panel will allow you to print whatever is in this pane or toggle between a white background and the color of the contact selected (or contact's color of an item selected).



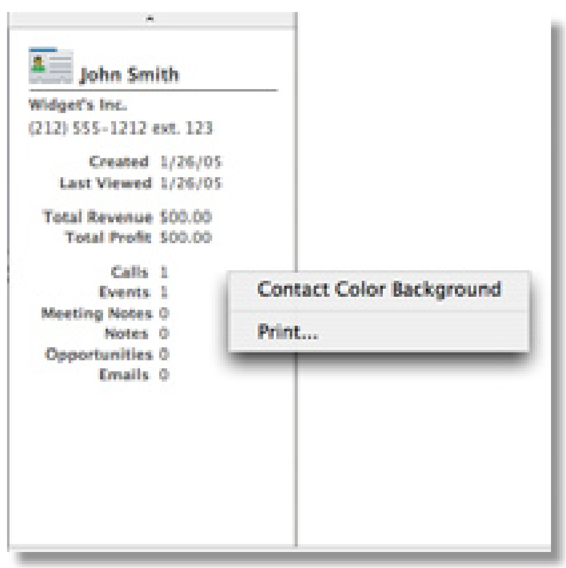
Info pane showing a contacts overview information



Info Pane showing a phone call selected in the Activity Log



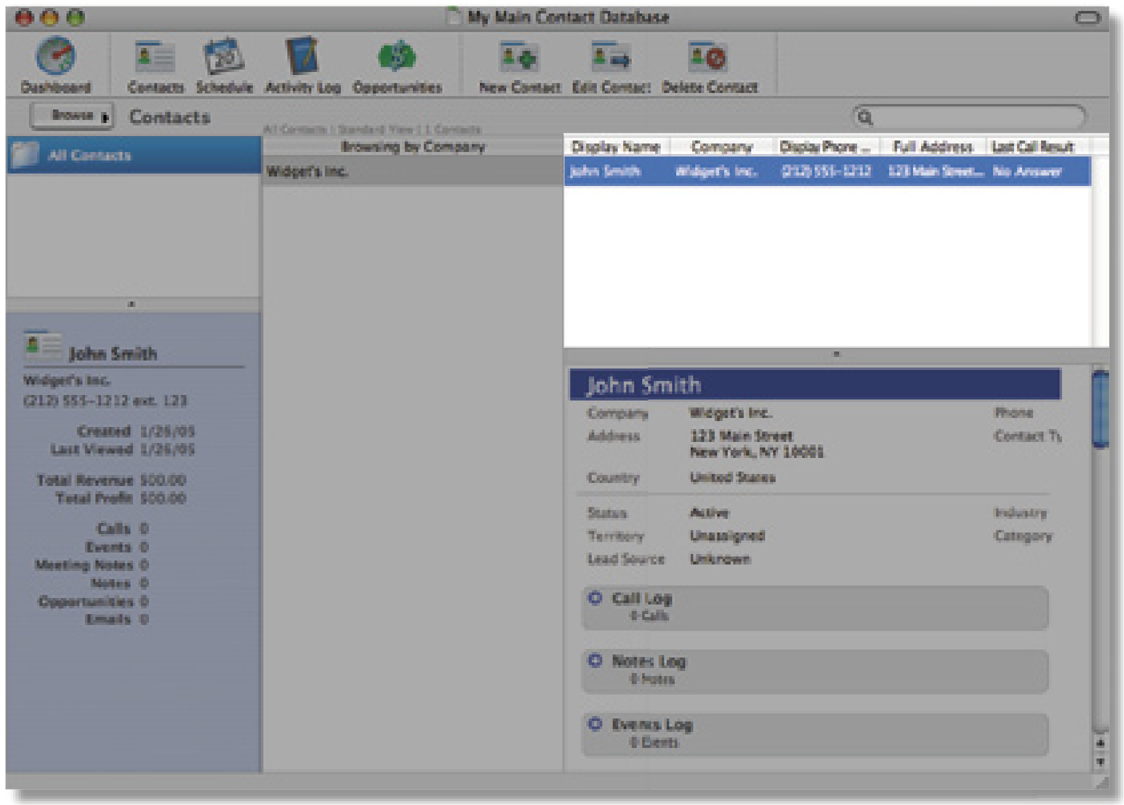
The Info Pane resize "Dimple" when closed



Info Pane without the Contact Color Background Selected, showing the Right-Clicked menu .

Contact Listing

This is the main contact listing where you select and manage your contacts. The contact listing has many ways to display your data. Under the "View" menu item, you can create new list views (presets which allow you to show different columns in your contact listing), set how color is applied to your contact list and display a color-coordinated contact icon. Right-clicking on a contact will also allow you to access your available activity options in a convenient manner.

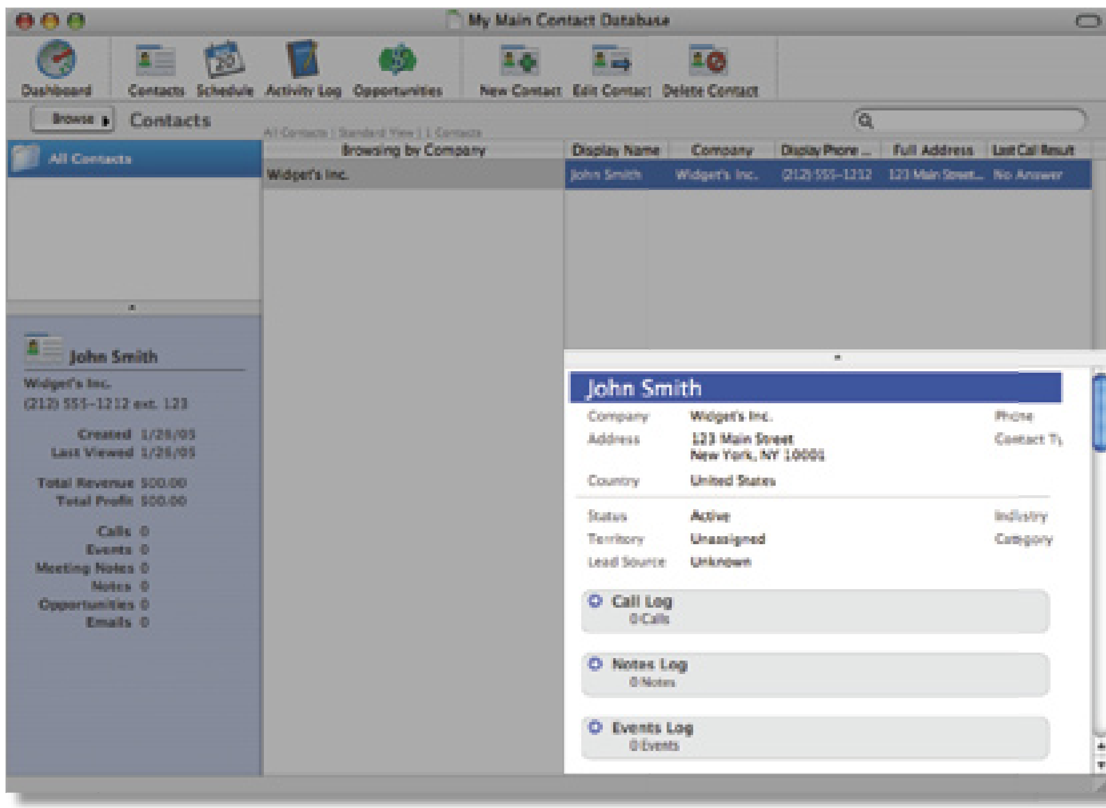


The Contact Listing

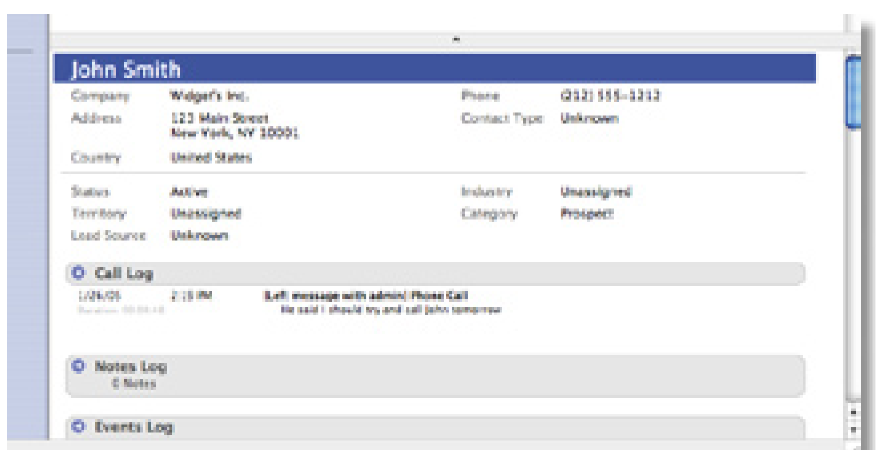
Preview Pane

The preview pane is another innovative feature of Redlien Account Executive that helps you work with your contacts quickly and easily. To activate this, click and drag the "dimple" at the bottom-middle of the Contacts view upward, or select the View > Preview Pane menu item.

The preview pane shows select activity information for any single contact you have selected in the Contact Listing. The activity logs displayed are: Calls, Notes, Events, Tasks and Opportunities. Preview Pane will also show basic contact information like address, phone numbers and categorization data. You can control how Preview Pane presents its information by right-clicking anywhere on the Preview Pane data.



The Preview Pane



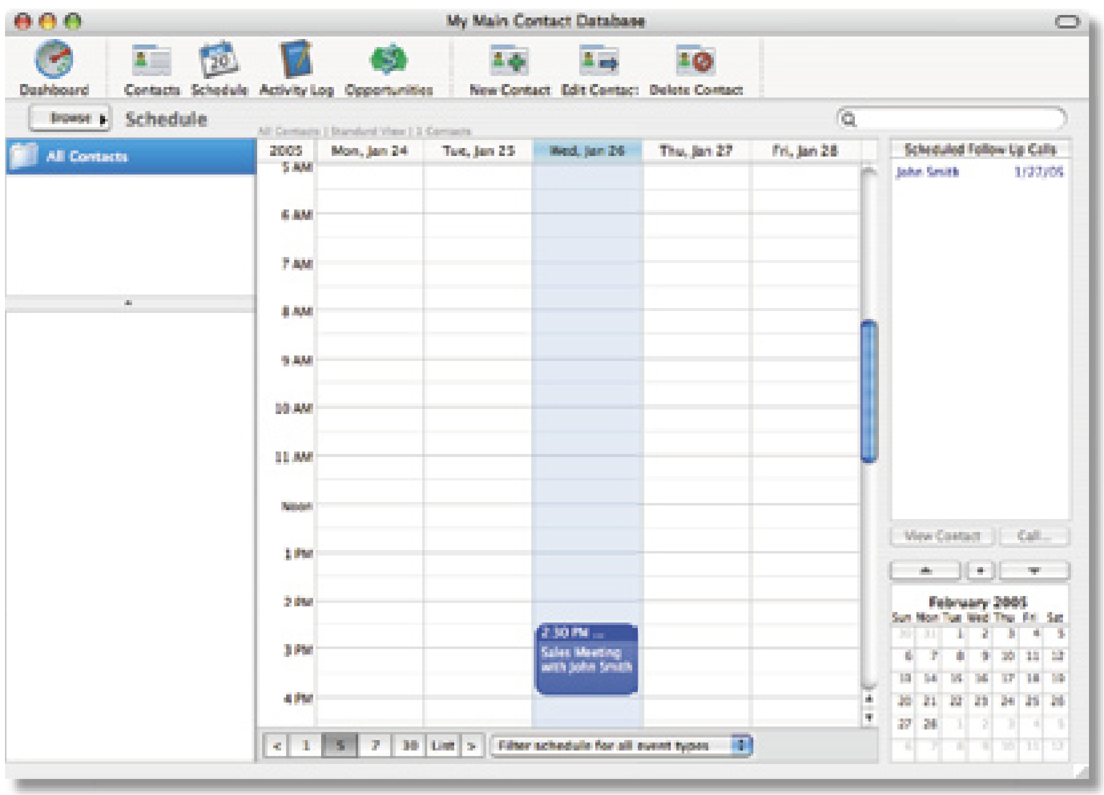
The Preview Pane showing the contacts call log

Schedule View

Schedule view includes several options for seeing what's on your schedule, including tasks, as well as upcoming follow up phone calls. All contact events that you create in Redlien Account Executive, as well as follow-up phone calls and tasks, show up in this pane. All task and scheduled events viewed are filterable by which group / browse by filter you have applied.

Calendar

The calendar can be viewed in either monthly, 1 day, 5 day (work week - Monday - Friday), 7 day (Sunday - Saturday) or Listview. To switch between views, either select one of the buttons at the bottom of the calendar, or use the View > Schedule View > menu options. In addition, by pressing Apple-Left arrow or Apple-Right arrow, you can navigate through the graphical calendar views (1,5,7 or Month view). A drop-down list at the bottom of the screen allows you to filter the calendar for specific event types and to show tasks or not.



The Schedule View, showing the 5 day Calendar (Monday - Friday)

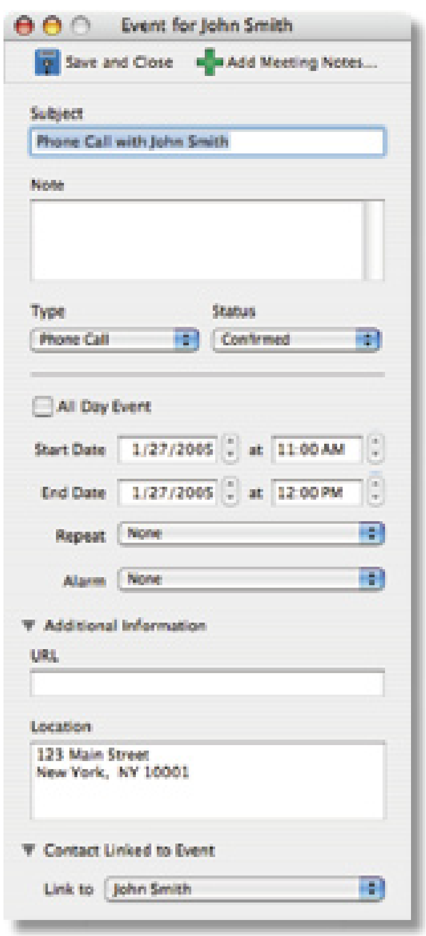
Scheduled Events

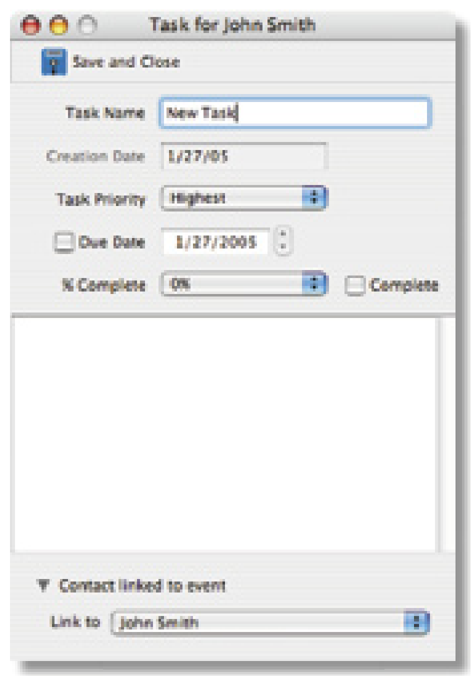
There are few different ways to add a new event to Redlien Account Executive. The easiest method is to select a contact in the Contact Listing, then select the Contact > New Scheduled Event... menu item. This will bring up the Event Window, allowing you to set start and end times, enter notes, URL's and address information as well as a few other options. If you have selected to synchronize your calendar with iCal, you will also be able to set repeating and alarming options for this event.

In addition to the above method, you may also add a new event by right-clicking on the monthly calendar and selecting "Create New Event...". This will bring up the New Event Window. If you have a "My Contact Record" selected, or if you have a contact selected in the Contact Listing, this event will be automatically linked to a contact. If no contact is selected, and you do not have a "My Contact Record", then the New Event will not be linked to any particular contact. To link the event to a contact, select a contact from the "Contact Linked to Event" option at the bottom of the New Calendar Event window. Clicking on a event will bring up a overview on the Info Pane (if open). Right-clicking on an event will allow you to edit the event, view the contact, or delete the event.

Tasks

Open tasks with due dates are automatically added to the calendar system when you create them. This allows you to see upcoming tasks that are open with a definite due date. Selecting a task in the calendar view will show an overview in the Info Pane (if open). Double clicking on the task will open up the task for editing.

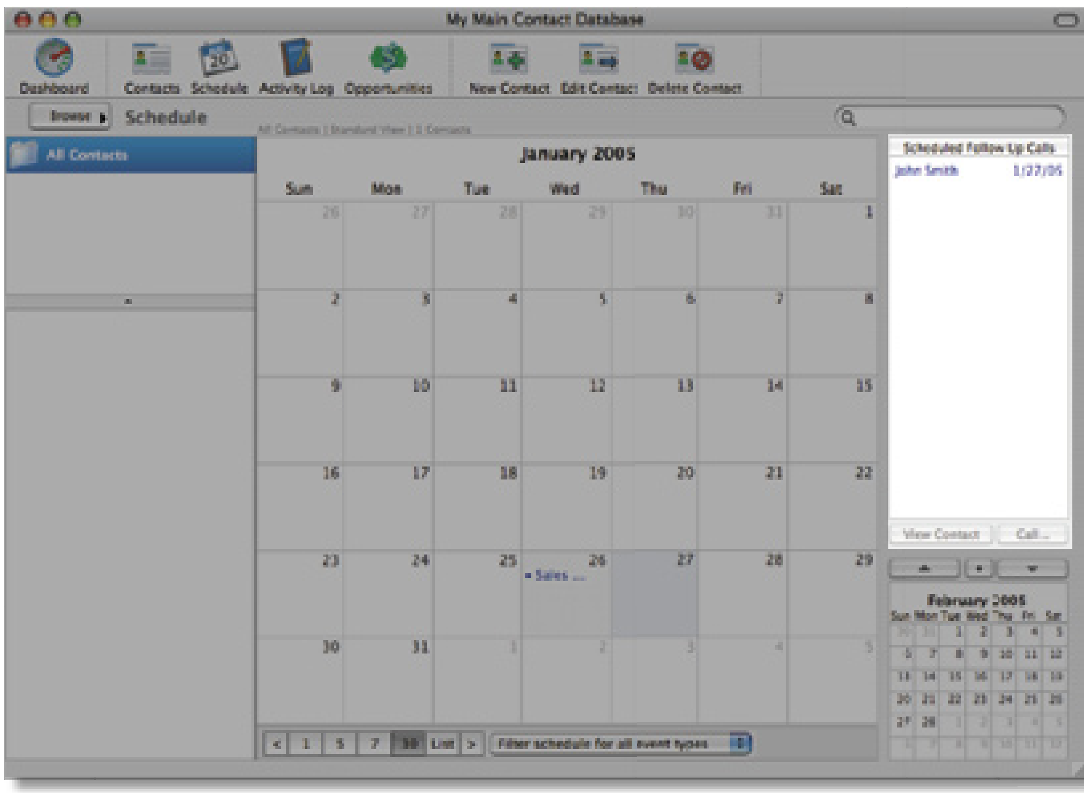




The Contact Event and Task Window.

Follow up Calls

In the course of your sales work, making phone calls is a central part of your life. Redlien Account Executive creates a separate section for follow up phone calls to reflect the importance of them. The top right listing of follow up calls allows you to see who you've scheduled to call *after* you have already called them once. To schedule calls to contacts you are approaching for the first time, or other types of calls like conference calls, we recommend creating them as New Events. All follow-up calls can be seen here, color coded according to their date. Follow up calls that you have not done by today's date will be shown in red, calls scheduled for today are shown in blue, and calls scheduled in the future are shown in grey. You may toggle showing missed follow up calls on and off by right-clicking in the Follow Up calls listing and selecting the "Show Follow Up Calls from Before Today" option. To make a new call, either double-click on one of the names in the list, or press the "Call..." button at the bottom of the listing. You can also view that contact by selecting the "View Contact" button.



The Schedule View, highlighting the Follow Up Calls listing

Follow up calls scheduled for today are marked in Blue.
Past (missed) follow up calls are marked in Red.
Future follow up calls are marked in Grey.

Toggle showing Past follow up calls by right-clicking on the Follow Up Calls listing

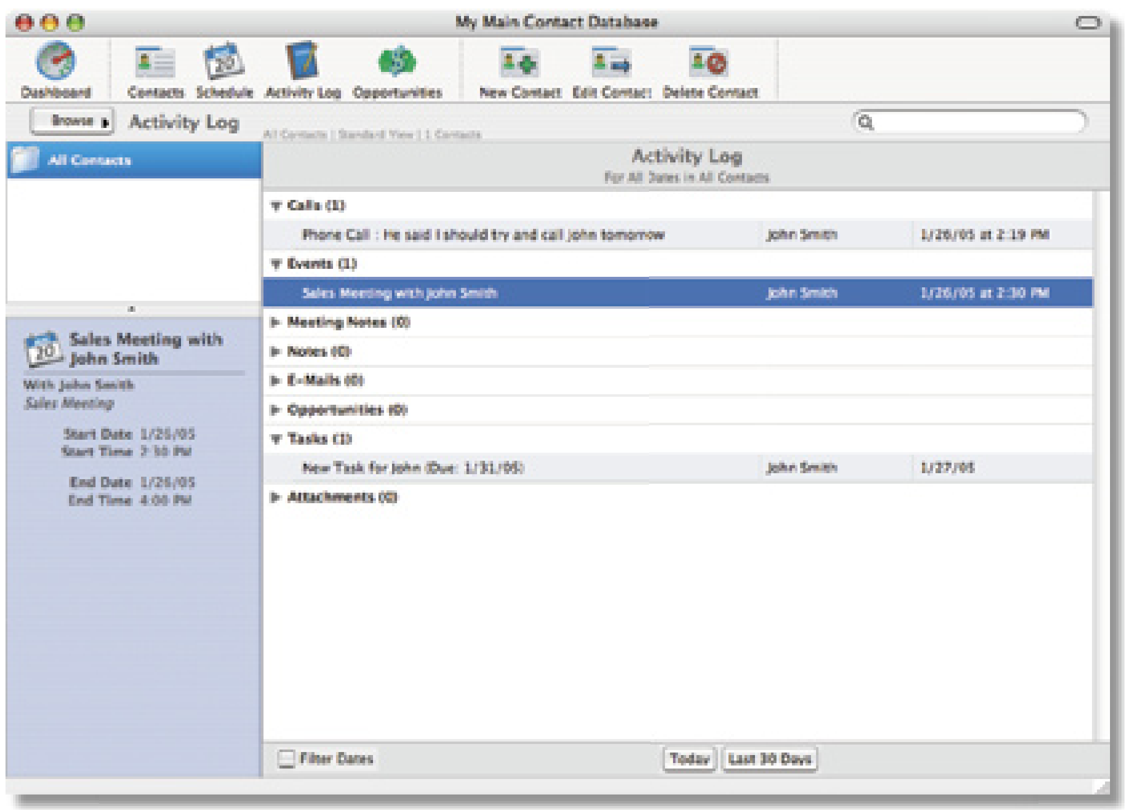
Activity Log

The activity Log shows everything that you have done with your contacts, including: Calls, Events, Meeting Notes, Contact Notes, E-mail's, Opportunities, Tasks and Attachments. This view allows you to filter by date range using the controls at the bottom of the listing. To filter by a date range, simply click on the Filter Dates box, select which dates you would like to view, and the log will automatically update itself. Two "quick date" buttons show what you did in the last 24 hours (today) and the last 30 days.

As with the Schedule view, any filters applied to the contact listing also apply for the Activity Log. For example, if you wish to see all the calls made to a particular company in the last 30 days, you can Browse By Company, select the company you wish to view, and click on the Last 30 Days button at the bottom of the Activity Log view. Click on the grey triangle to the left of "Calls" in the Activity listing, and it will show you all the phone calls made to that company, including to which contact within that company.

Selecting any of the activities in the log will show an overview in the Info Pane (if open). Double clicking will open that activity, and by right-clicking, you can edit the activity, view the contact associated with the activity, or delete the activity.

The Activity Log can be printed. To do so, simply have the Activity Log view showing and go to File > Print. This will print whatever is shown in the current listing.



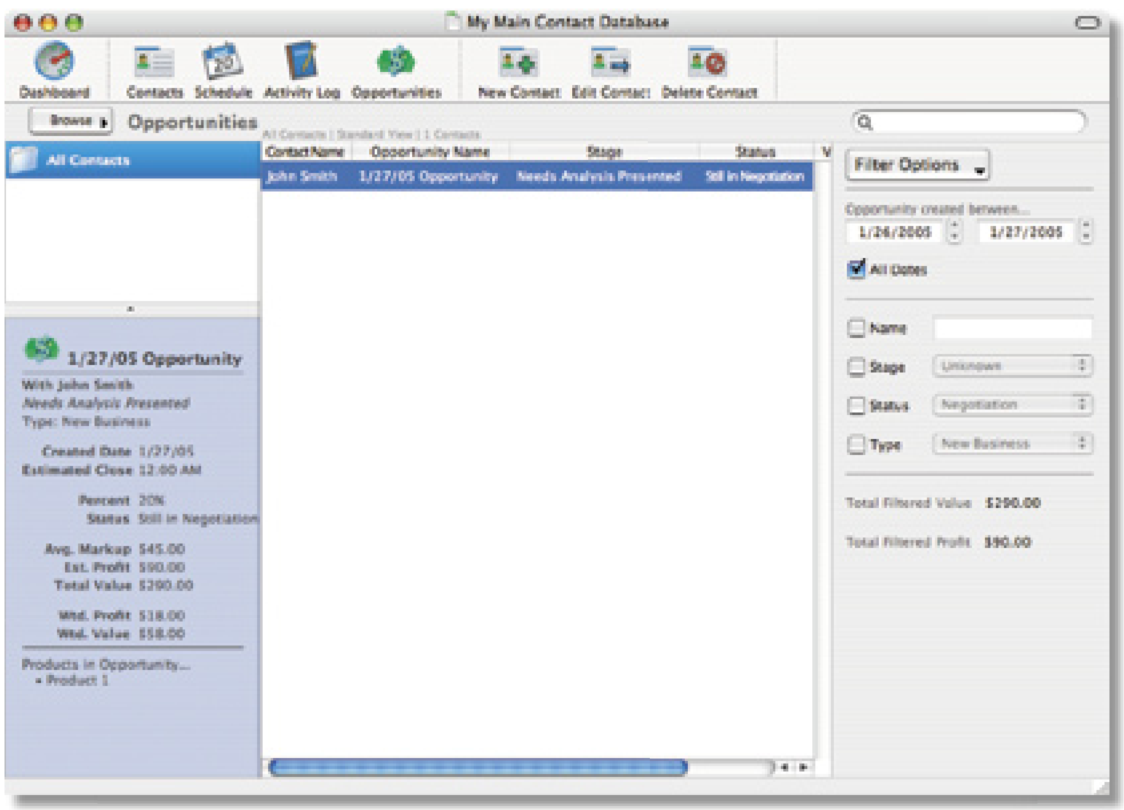
The Activity Log View, with no date or browser filter applied, and an event selected showing in the Info Pane .

Opportunities

This screen provides you with a view into your sales opportunities. As with the Schedule and Activity Log, for whatever contacts you have filtered for using Browse By, Group selection, or Find, only those contacts with opportunity data will show up in the Opportunities listing.

There are two different ways to view your opportunities: A Simple and Extended view. To toggle between them, click on the button "Filter Options" to the right of the opportunities listing. In addition you may export as a tab-delimited text file the data that is shown in the opportunities listing from that button as well. Using the filter options to the right of the opportunities listing, you can fine tune the opportunities viewed.

Double clicking on any of the opportunities will open up that opportunity for edit. As with the other views, selecting an opportunity from the list will show an overview in the Info Pane (if open).



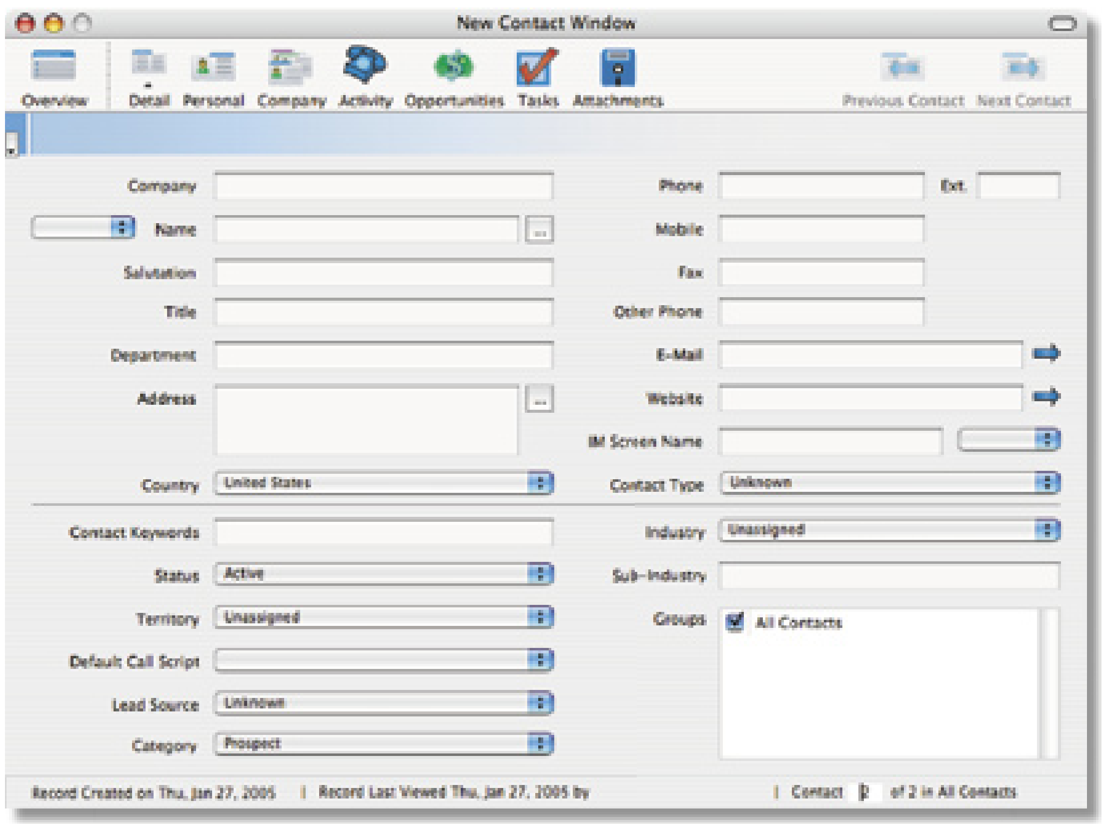
The Opportunity view, with no filters applied, showing a selected opportunity in the Info Pane

Creating and Working with Contacts

Creating a new contact

Creating a new contact for use in Redlien Account Executive is easy and quick! Simply click on the button “New Contact” at the top of the Main Window, or select the Contact > New Contact menu item.

When you create a new contact, you’ll be presented with the Contact Window, shown below. This window provides you with several options to help you categorize, manage and perform activities with that contact. The sections available are: Overview, Detail, Personal, Company, Activity, Opportunities, Tasks and Attachments.

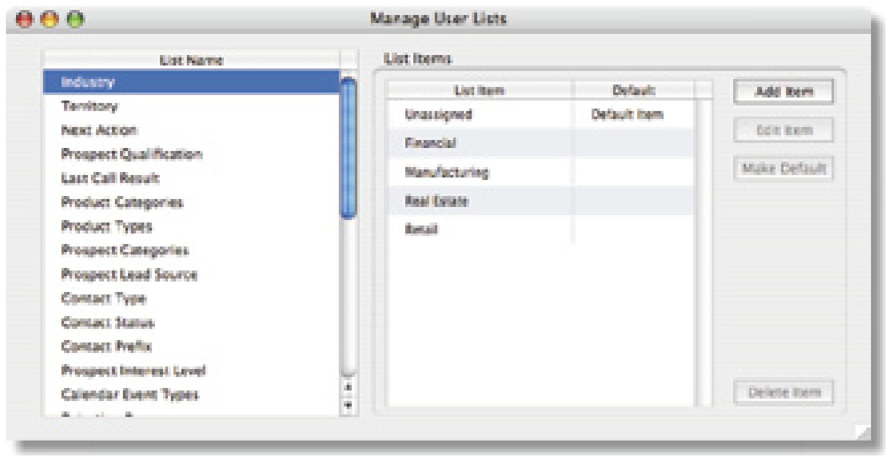


A new Contact Window, shown with no data entered.

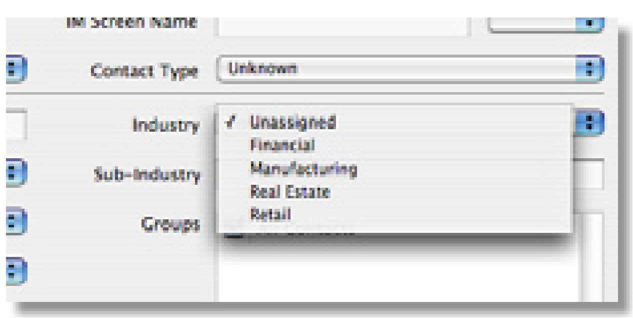
Entering and saving your contact data

Redlien Account Executive saves all the data you enter into your contact record automatically whenever you close (or otherwise move on from) the contact you're viewing. To register a change in a particular field (like Company or Name), you must also move away from that field before closing the Contact Window. You can do so by pressing Tab (which will move you off to the next field) or just click on another field. In addition, if you do not enter a name or company for a new contact window, Redlien Account Executive will ask you if you wish to save the record.

To change the drop-down lists (i.e.. Industry, Contact Type, etc.), you can use the Tools > Manage User Lists... menu item. This will allow you to select from 28 different drop-down lists that are used in Redlien Account Executive, and change the values that are presented to you. This helps you to maintain a data conformity within your contact database, so you can easily find and categorize your information.



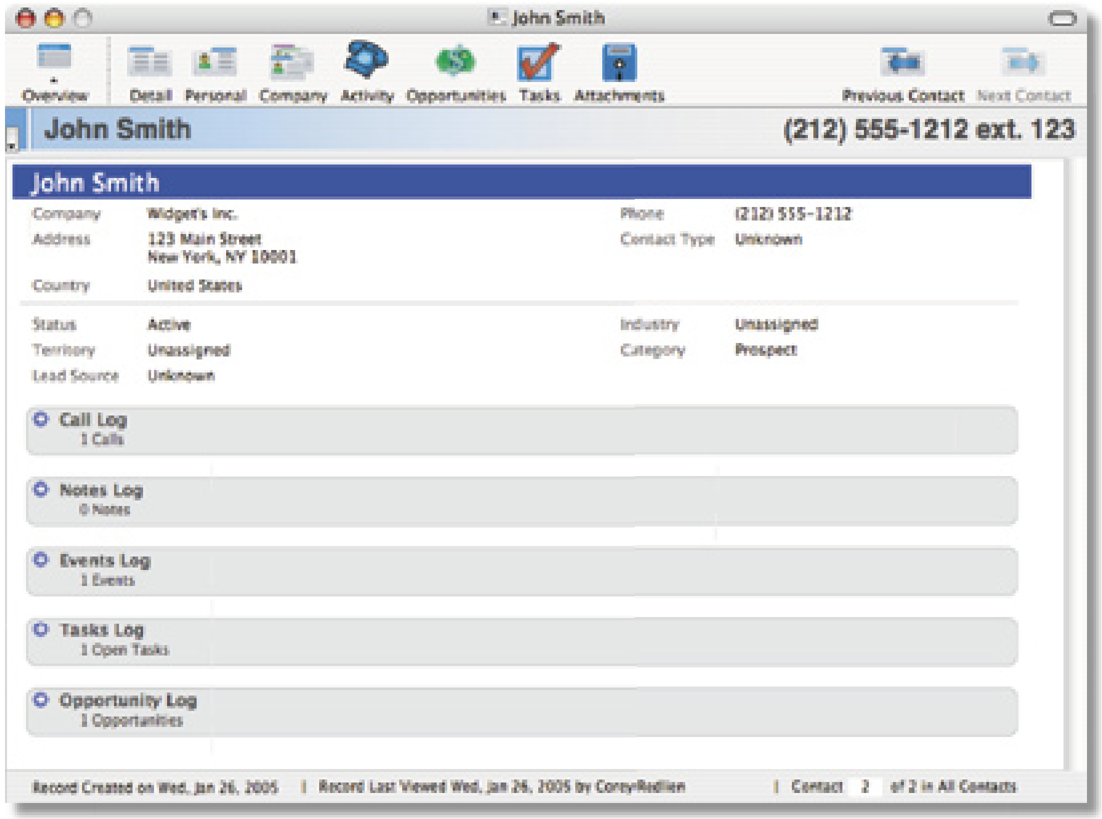
Manage User Lists window, selected from the Tools > Manage user Lists... menu allows you to change the drop-down lists data throughout Redlien Account Executive.



An example of a drop-down list,
the Industry listing from the Contact Window Detail Section.
Use the Manage User Lists tool to modify this list.

Contact Window Overview Section

The Overview section provides a quick snapshot of your contact's activity. Controlled in a similar method as the Main Window's Preview Pane, you may set its options by right-clicking directly on the Overview.



Contact Window Overview Section, with an open Opportunity Log

Contact Window Detail Section

The Details section is your main data input section for your contact record. This section contains items like name, company, telephone, title and other common information.
In addition, you can set categorization and grouping for your contact in this section.

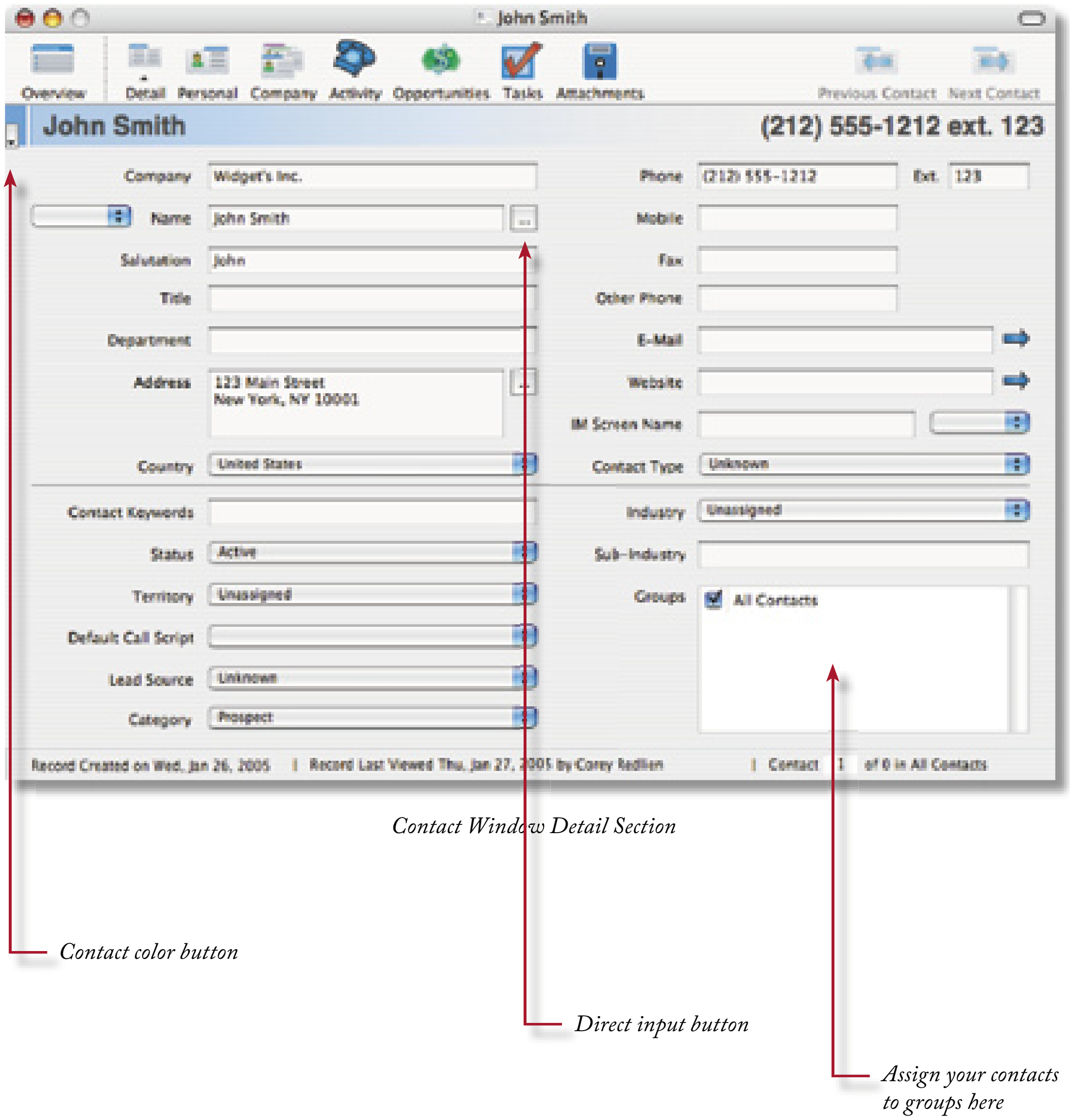
One of the automation features of Redlien Account Executive is detecting when you are entering a new contact with a company that you already have in your database. If you create a new contact with the same company name as another in your database, RAE will ask you if you wish to use that company data.

Name and Company Auto-Parsing

Redlien Account Executive will try to automatically "parse" names and address information that you enter. This allows you to search and/or filter by categories like First Name, Last Name, City and other discrete information points, while still providing a quick and simple user-interface. To check that Redlien Account Executive has parsed the name and address you entered correctly, you can click on the "..." button next to the appropriate field. This will bring up a dialog box that you can enter data directly into.

Contact Color

You can assign your contacts different colors by using the button at the left of the header on the Contact Window. You can choose from Blue, Teal, Orange, Red, Purple, Yellow and Green. To view your contact color in the Main Window contact listing, use the View > Contact List Colors > Contact Color menu item. You can sort your contacts by color in the Main Window contact listing by first enabling contact icons in the contact listing using the View > Show Contact Icons menu item, then pressing the heading at the top of the list.

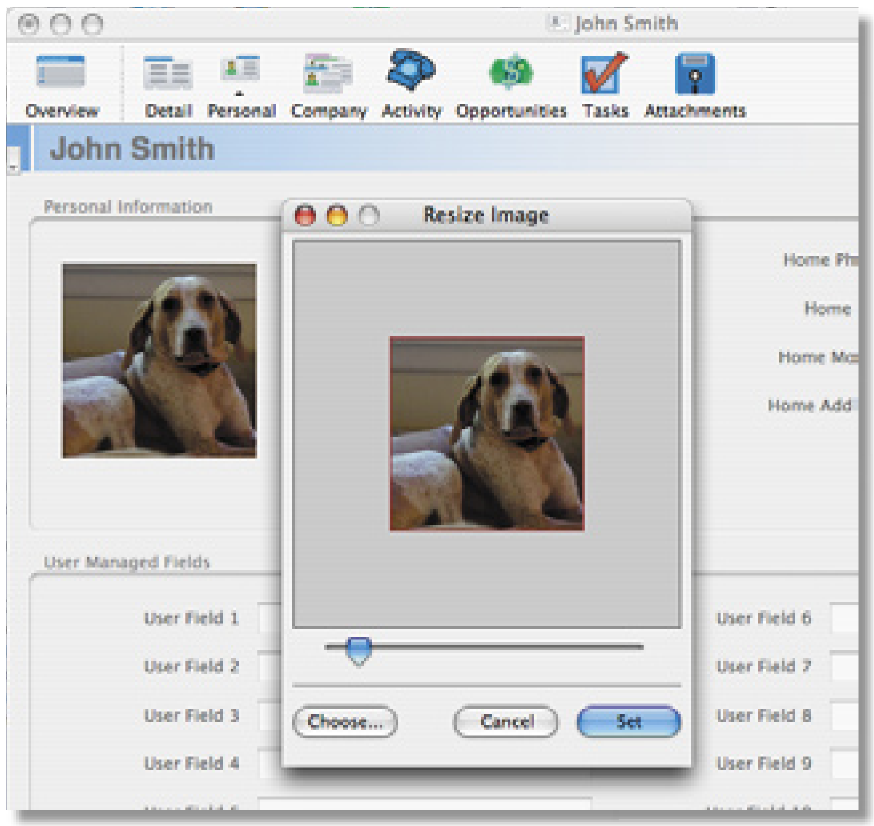


Contact Window Detail Section

Contact Window Personal Section

The Personal section of the Contact Window contains information relating to the contact's home address, picture, and the User Definable fields. To add a contact picture, you can drag a .jpeg (.jpg) picture on to the blank space to the left of the contact's home information, or use the Contact > Add / Edit Contact Picture menu item.

To modify the User Defined fields, use the Tools > Manage User Fields... menu item. You can set these fields to have a custom label, as well as a custom data type (such as Date, currency or integer only). When changing the data type of a user field, you must restart Redlien Account Executive to make those changes take effect.



Contact Window Personal Section, showing a contact picture being edited

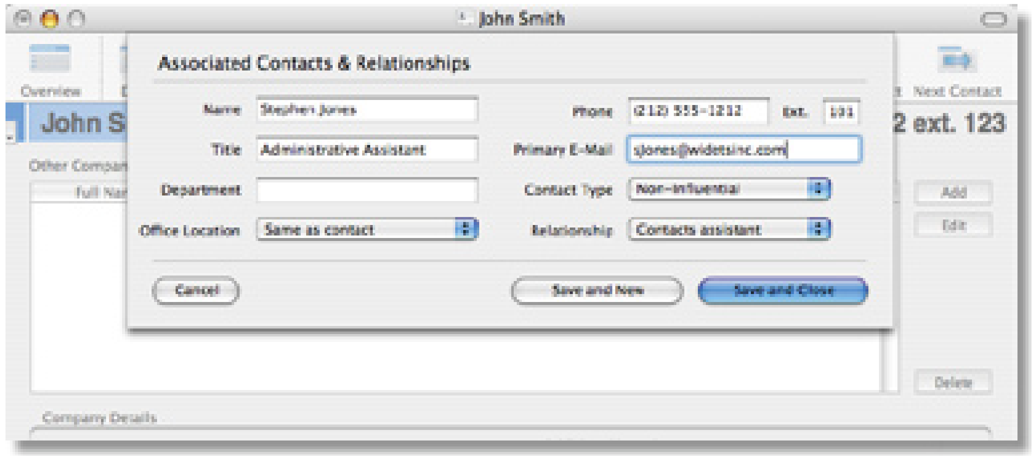
Contact Window Company Section

This section allows you to store company-specific data relating to your contact, additional contacts within the company, and additional address, phone and e-mail information.

Additional Contacts

This listing allows you to maintain a list of additional people, and their relationships, that are associated with contact you are currently editing. To add a new additional contact, click the "Add" button at the left of the Additional Contact listing. This will bring up a dialog window allowing you to enter the person's name, phone number, title and other pertinent data. In addition, you can keep track of their relationship to your main contact with the Relationship drop-down list. For instance, you can store your contact's administrative assistant's name in this section, and assign a relationship of "Contact's Assistant."

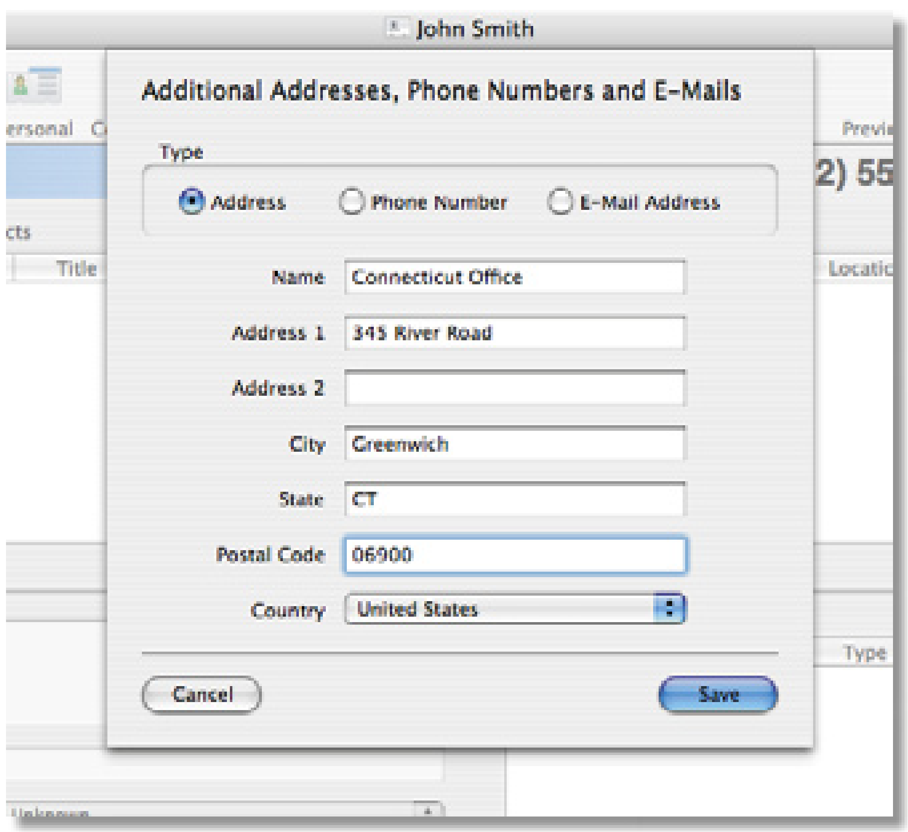
Redlien Account Executive will automatically place any contacts in your database of the same company name within the Additional Contacts listing. This allows you to "at-a-glance" see who else works for that particular company, as well as easily access their data, and provide relationship information as well.



Additional Contact dialog window

Additional Locations

This section allows you to store an unlimited number of e-mail, telephone and addresses for your contact. Also, addresses stored here are available to your Additional Contacts Office Location drop-down list. To add a new Additional Location, click on the "Add" button at the right of the Additional Location listing, select which type of location you wish to add, and enter the appropriate data.



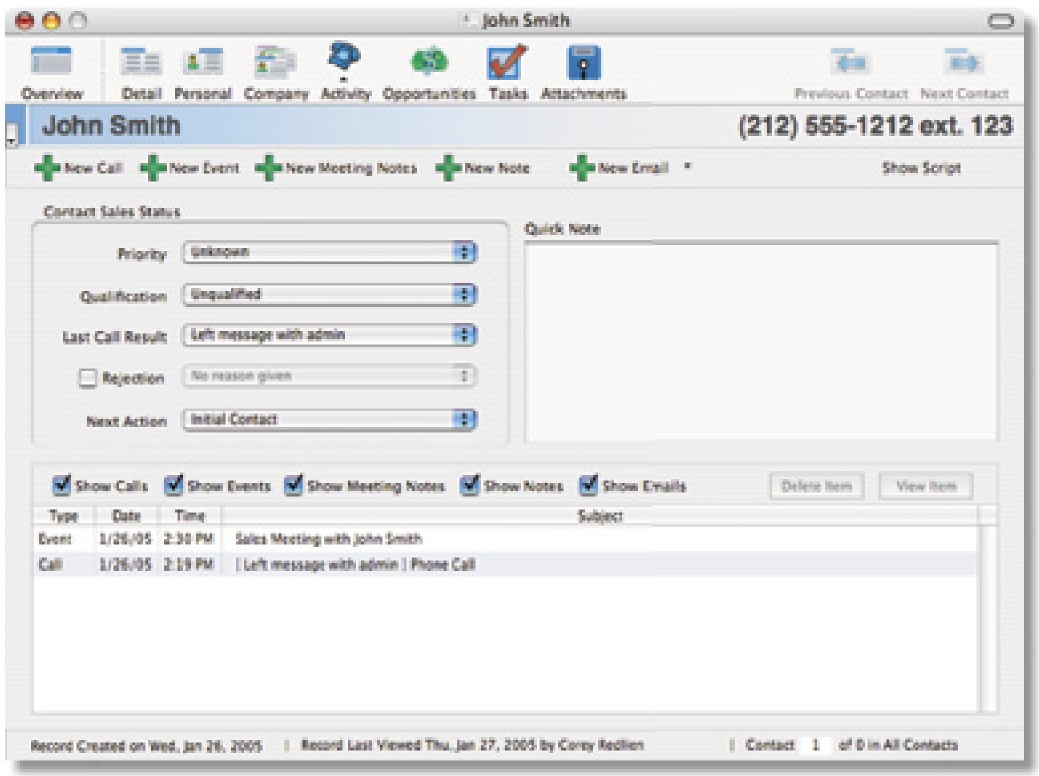
Additional Addresses dialog window

Contact Window Activity Section

The Contact Window Activity Section is your control center for everything that you do with a contact on a regular basis. From here, you can record new phone calls, events, meeting notes, contact notes and send e-mail's. A filterable listing of all your contact activity history is available, as well as sales categorization like priority, qualification, last call result and more.

History Listing.

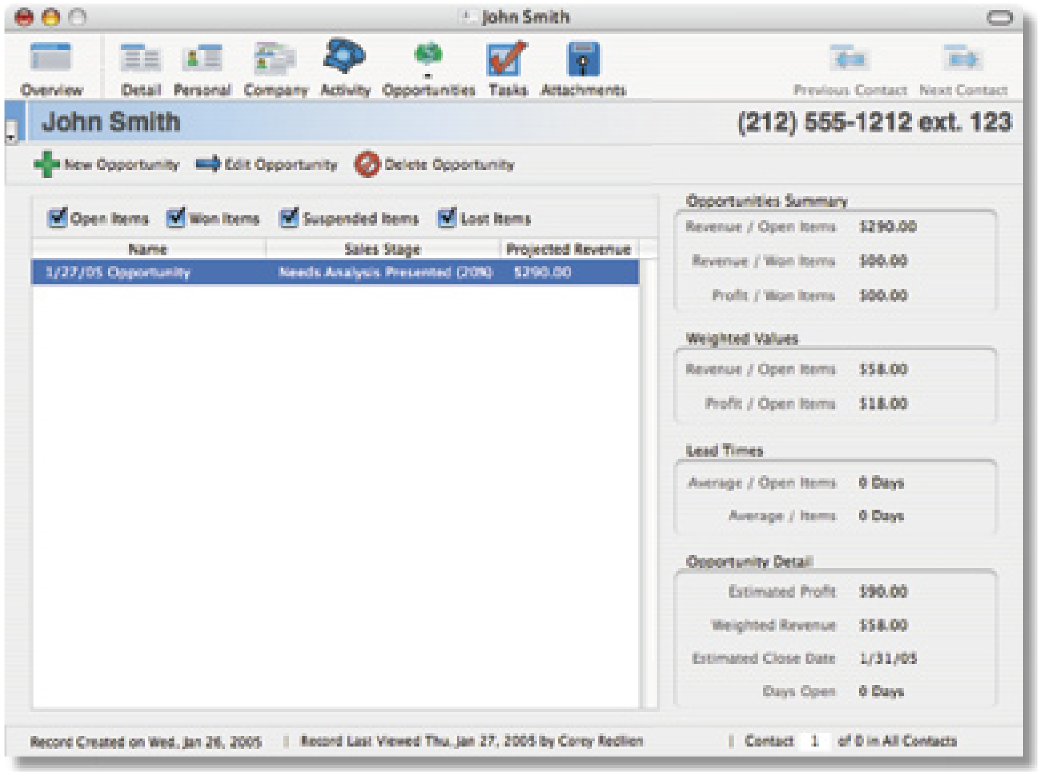
This window shows your activity history for the contact. By clicking on the checkboxes at the top of this listing, you can filter what types of information you see. To open an item for editing or viewing, double-click on the item or press the "View Item" button at the top right of the listing.



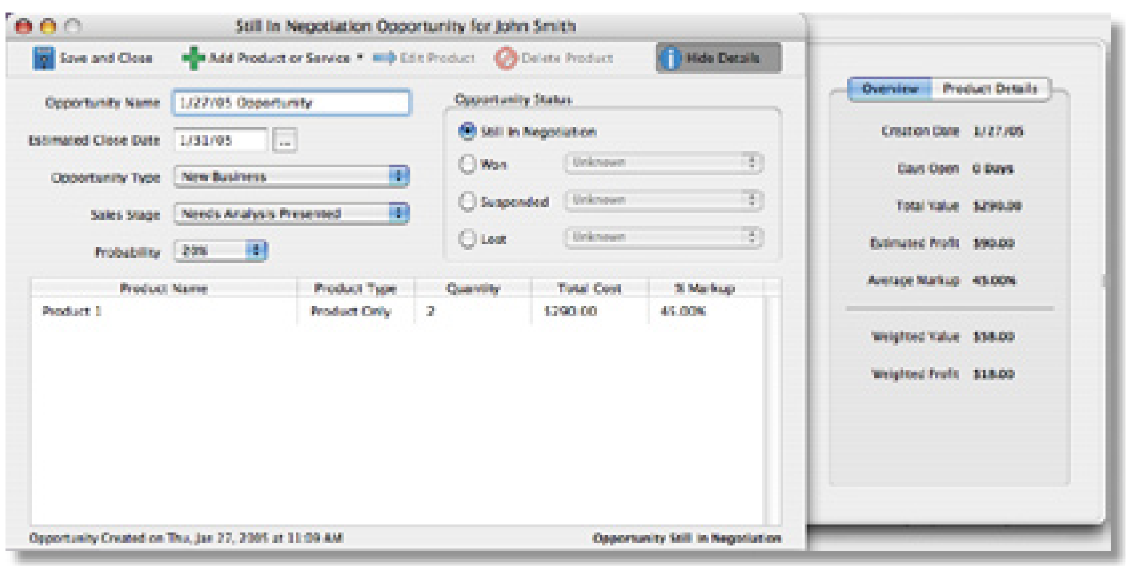
Contact Window Activity Section

Contact Window Opportunities Section

At the heart of any sales contact database is, naturally, sales opportunities. The Opportunities Section is where you create, view and edit new opportunities for your contact. You can filter the listing based on open, won, suspended or lost items, and get a overview of your visible opportunities at the right. Selecting an opportunity will show you an overview of that opportunities profit, revenue, estimated close date and how many days open the opportunity has been.



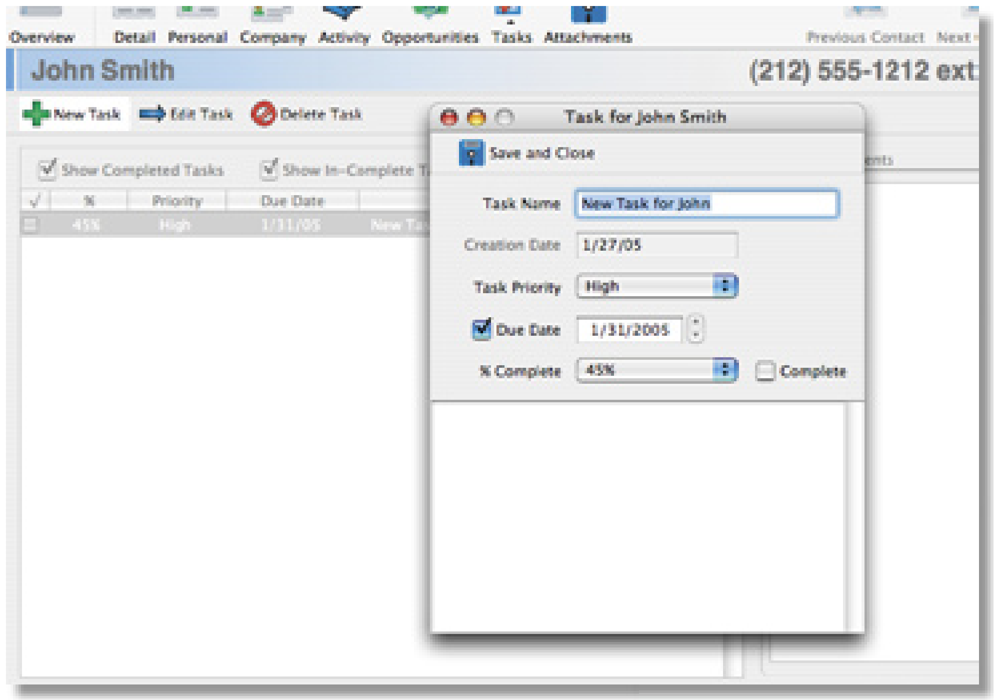
Contact Window Opportunity Section



Opportunity Window with 1 product added to the opportunity.

Contact Window Tasks Section

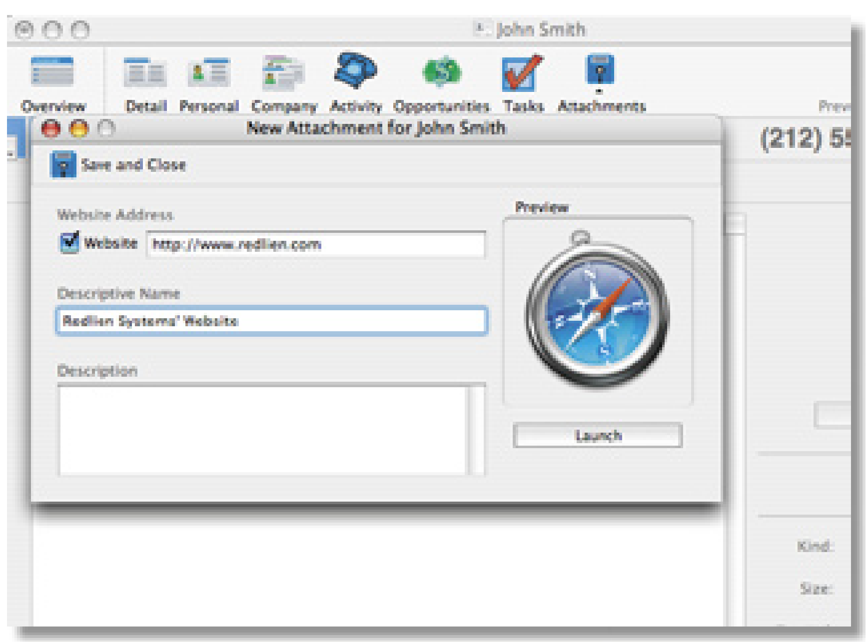
This section allows you store and modify your contact tasks. A listing at the right of the screen will show you all of your contacts upcoming events.



Contact Window Tasks Section, showing editing a task

Contact Window Attachments Section

Here you can store your contact's attachments, either internet or file based. In addition to this listing, you can view all of your contact attachments using the Tools > File Library menu item.



Contact Window Attachments Section, showing adding a new Internet attachment