Learning Your SalesNexus Menu Bar

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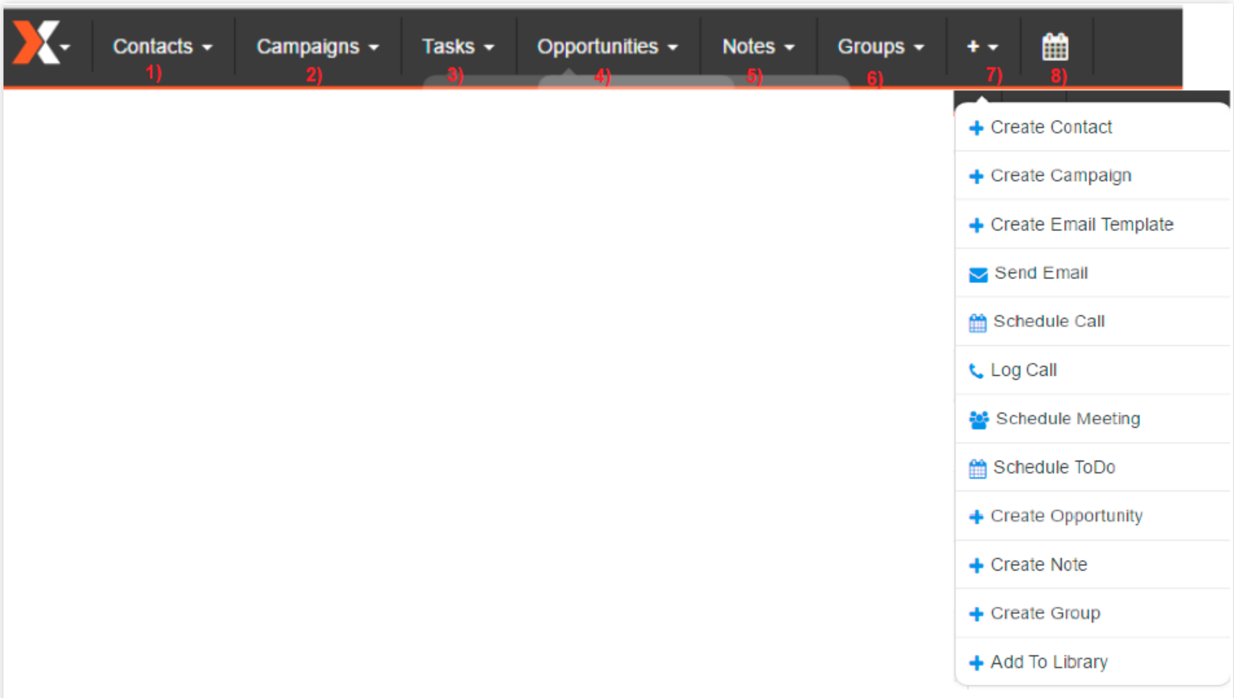

Description

1) To view your contacts or other actions in line with your contact records, you can choose this option. Several choices then should be available such as creating new contacts and doing look-ups.

2) The Campaigns tab brings us a couple of options in managing key pieces of our campaigns. You can setup a campaign, create email templates, manage subscriptions and upload file attachments for your emails in this section.

3) Tasks in the system can be viewed and managed here; there are a couple of options such as scheduling calls, meetings, to-dos, view our calendar and enable/disable the pop-up alarms.

4) Sales related items and opportunities are located under this tab. You can create sales opportunities, reports and also have the ability to send a quote over to customers.

5) Creating/Viewing and generating notes report can be accessed through this tab.

6) Managing Groups and Sub-Groups can be done under this tab.

7) The plus sign gives us a couple of quick pre-set shortcut actions that is commonly used in the system.

8) You can access the calendar icon to view and manage your scheduled items such as to-dos, meetings and calls. Under this option, you also have the choice to switch your display to either Monthly, Weekly or Daily view.