Veloxity CRM
Quick Start Guide

Version 2.0

Veloxity CRM: The New Force in CRM

New User Edition | 2020

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Getting Started

1. ***Use Veloxity CRM as your DESKTOP.***
   Imagine sitting down at your desk and setting up your supplies to start working. Now imagine that Veloxity is your desktop. With Veloxity CRM, the supplies you need for work are located within Veloxity.

2. ***ACTIVITIES function as your daily to-do list.***
   While we cannot control the outcome of the sales process, we are in control of the activities we pursue related to our opportunities. As soon as you complete an activity, be sure to schedule the next step.

3. ***Use CHARTS to answer your most important questions at-a-glance.***
   Charts are powerful and easy to use. Take the time to save the charts that matter most to you. Access them quickly, anytime. Use charts to easily visualize your important data:
   - What have I closed?
   - How am I tracking against my quota?
   - What do I have to do to get to my quota?

4. ***Use the SALES PIPELINE to quickly visualize the stages of all your open Opportunities.***
   Quickly analyze large amounts of data, and keep opportunities from falling through the cracks, by tracking your sales pipeline using Veloxity's dynamic visualizations.

5. ***Update CONTACTS to reflect their current roles in the sales process.***
   Manage contact roles and always know the best contact to reach at each stage of the sales process.

6. ***Track and nurture your LEADS through the qualification process.***
   Follow the steps in the lead process to ensure best practice.

7. ***Generate QUOTES using your company's logo quickly and easily within Veloxity CRM.***
   Manage products, create product bundles, generate professional quotes, and quickly attach them to email within Veloxity. Link quotes to opportunity records and have all the information you need on one page.

8. ***COLLABORATE with your team.***
   Share your records with other users. Control the security of your data by setting controls to determine who can view, edit, read, or have full administrative control of your data records.

Getting Started

Velozity CRM is a customer relationship management (CRM) application. Because Veloxity is cloud-based, getting started is easy. All you need to begin is a computer, an internet connection, and a web browser. Windows and Mac operating systems are both compatible.

How might you use Veloxity CRM? Consider how you currently manage your sales process:

- How do you maintain current contact information?
- Where are your notes on new opportunities?
- Where do you find the most current product pricing?
- How are you tracking each opportunity through the sales pipeline?
- What is your sales process?
- Are you focusing on the right opportunities?
- Can you quickly see all completed activities and what still needs to be done to close a sale?
- How do you share current and accurate data with your team?
- How are you tracking against your quota?

Veloxity helps you quickly answer these questions by organizing your data within an intuitive and modern CRM application.

Analyze and share your data with a suite of powerful out-of-the-box charts.

Nothing gets lost.
Nothing falls through the cracks.
The information is accessible from anywhere.

BEFORE you begin learning Veloxity CRM, take a few minutes to focus on why you are learning the application. Being clear about why you are doing something can improve your learning process.

CRM Glossary

Accounts represent the companies with which you have a relationship.

Activities are the actions you perform throughout the sales process.

App Setup is the configuration area for the Veloxity platform.

Calendar integrates with Google Calendar allowing you to see all your activities in one place.

Contact Roles define the role a contact plays within a specific opportunity.

Contacts are people. Contacts are often involved in the purchasing of your product.

CRM Setup is a powerful interface allowing users to customize company information and automate standard sales processes.

Email and Calendar Setup syncs your current email and calendar account with Veloxity CRM.

Favorites save the location of your favorite data in Veloxity CRM.

The Hub centralizes your data and activities enabling quick access to the information you need all in one place.

Inbox integrates your Gmail account with Veloxity CRM's innovative email features.

Leads are unqualified sales opportunities.

Linked Records connect related data from a single record view without duplicating information.

My Profile is a record of your preferences and personal details.

News Feed provides current international, national, and local news about your accounts.

CRM Glossary

Notifications function as an internal chat system.

Opportunities represent potential sales to qualified prospects you are working to close.

Opportunity Kanban tracks your Opportunities through each stage of the sales pipeline.

Product Bundles are custom-defined sets of Products often sold together at a discount.

Query by Example (QBE) models the structure of the documents for which you are searching. Enter the values you wish to search directly into the form.

Quick Search enables searching for Data Records and Documents across the entire system.

Quick Theme quickly changes the look and feel of Veloxity CRM by changing the color scheme.

Quote Maker enables you to create and send quotes directly from Veloxity CRM.

Recent Places keeps a chronological history of the last 15 Veloxity CRM web pages visited.

Sales Pipelines visualize the sales stages within your sales process.

Sales Quotas are the minimum sales goals for a set forecast period.

Theme Manager enables detailed changes the color scheme along with other graphical appearance customizations.

Timeline displays updates and activities related to your opportunities.

User/Group Roles grant record-level privileges to users including viewing and editing data.

Quick Tips

USE VELOXITY AS YOUR DESKTOP

Imagine sitting down at your desk, getting out your supplies, and setting up your workspace. Now imagine that Veloxity is your desktop. With Veloxity CRM, the supplies you need for work are located within Veloxity. Send emails, generate quotes, track your activities, manage documents, and much more.

ACTIVITIES ARE YOUR DAILY STRATEGY

While we cannot control the outcome of the sales process, we are in control of the activities we pursue related to our opportunities.

- Create activities for all of your open leads and opportunities.
- Once you complete an activity, be sure to schedule the next step immediately.
- Add due dates to each activity.
- When you open Veloxity, navigate to the Calendar and visualize today's TODOs.

USE CHARTS TO ANSWER YOUR MOST IMPORTANT QUESTIONS

Charts are robust and easy to use. Charts process large quantities of complex data quickly. Use Chart Builder to create and save the charts that matter most to you.

Start by defining 2-3 essential questions. What are the questions you ask every day?

- What have I closed?
- How am I tracking?
- What do I have to do to get to my quota?

Create and save charts that answer your questions. Using Saved Charts, you can visualize and analyze data related to your key questions with just one click.

HOW CAN I ADD AN OPPORTUNITY?

1. Navigate to the Hub.

2. Click **+ Add Opportunities**.

3. Enter *Opportunity Data.*

4. Click **Add Opportunity.**

HOW CAN I CONVERT A LEAD INTO AN OPPORTUNITY?

1. On the Main Menu, click **Leads**.

2. Click **List All Leads**.

3. Select the *Lead Record* you want to convert.

4. Click **Create Opportunity**.

Veloxity automatically prompts you to add Contact Records, Opportunity Records, and sometimes Account Records (depending on your business process) when the Lead is converted. You do not need to enter these records separately.

HOW CAN I MOVE AN OPPORTUNITY THROUGH THE SALES PIPELINE?

1. Navigate to the *Opportunity Kanban*.

2. Drag and drop the *Opportunity* from one sales stage to the next.

3. Veloxity automatically updates the sales stage and moves the Opportunity through the Sales Pipeline.

HOW CAN I VIEW MY ACTIVITIES?

Access Calendar from the Main Menu.

Activity Tracking with Calendar View allows you to see all your Activities from a day, week, or month view.

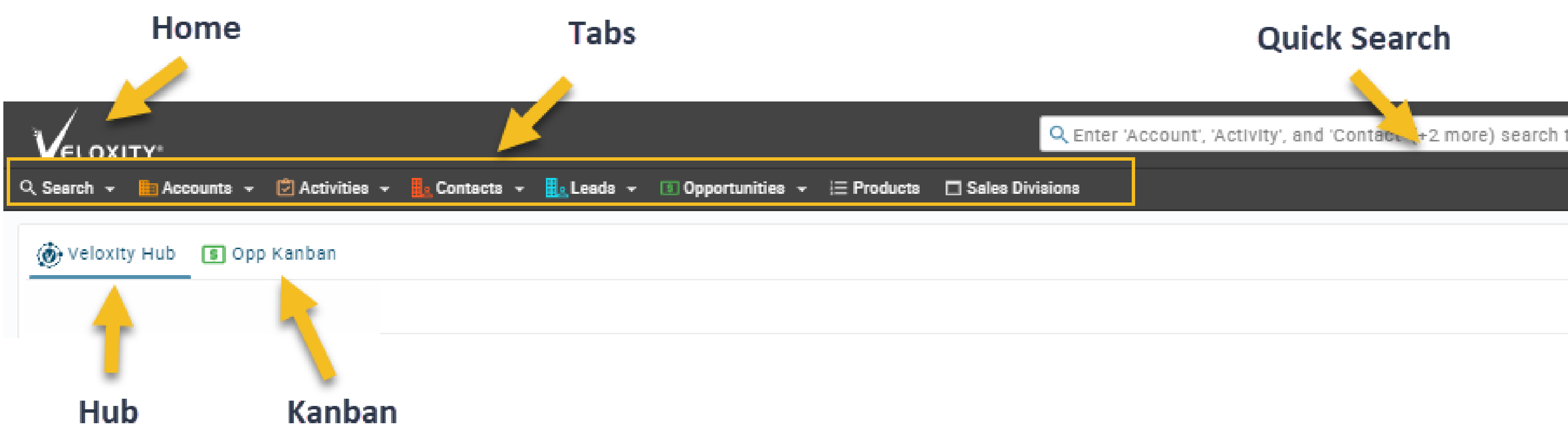
Start your day by reviewing your Activities. Quickly visualize what needs to be done.

Schedule an activity for each of your open Leads and Opportunities. Once an activity is completed, be sure to schedule the next activity. Assign dates to activities.

HOW CAN I ADD AN ACTIVITY?

Quickly add Activities from the Hub or Opportunity Kanban by clicking the activity symbol.

Main Menu



Main Menu Features

Home: Click the Veloxity logo to return to the Home Page.

Hub: Find all the information you need in one place. The Hub centralizes your data and activities.

Opportunity Kanban: Visualize your open opportunities, and update sales progress on the kanban.

Quick Search: Easily search data records and documents across the entire Veloxity CRM system.

TABS

Search: *Access Saved Search, Advanced Search, Query by Example, Audit Log, and Recent Searches*

Accounts: *Add Accounts, List All Accounts, Search Accounts*

Activities: *List All Activities, Search Activities*

Contacts: *Add Contacts, List All Contacts, Search Contacts*

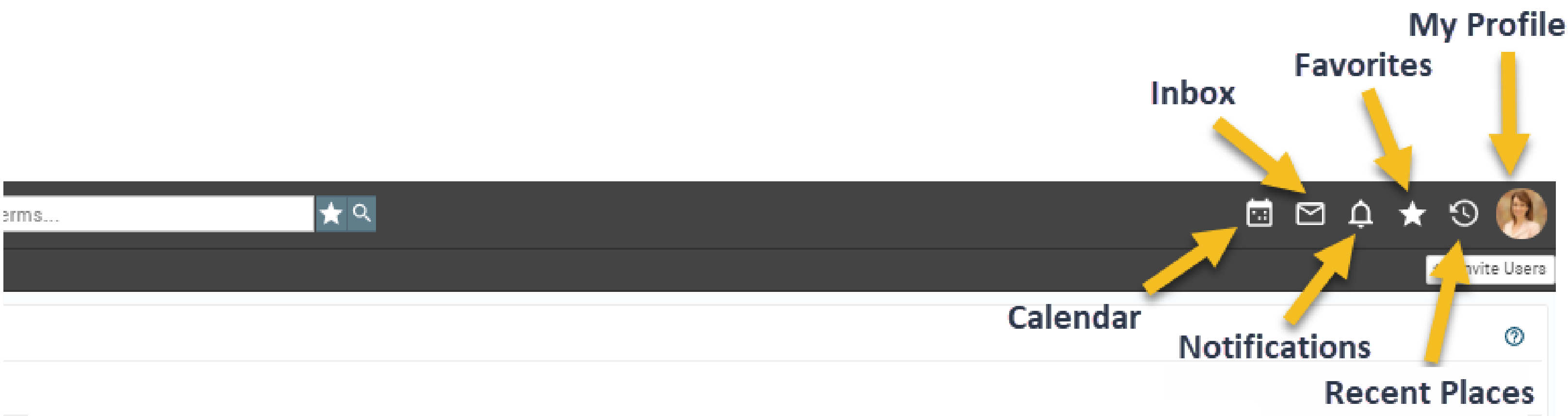
Leads: *Add Leads, List All Leads, Search Leads*

Opportunities: *Add Opportunities, List All Opportunities, Search Opportunities*

Products: *Access Product Management, Products, Product Bundles*

Sales Divisions: *Access Sales Division Hierarchies, Quotes, Forecasts, and more*

Main Menu



Main Menu Features

Inbox: Integrate your Gmail account with Veloxity CRM's innovative Inbox features designed to save you time and increase productivity.

Favorites: Quickly save the location of your favorite data in Veloxity CRM.

My Profile: Record your preferences and personal details. Configure email, calendar, meetings, change your password, access groups, open administrator settings, and more.

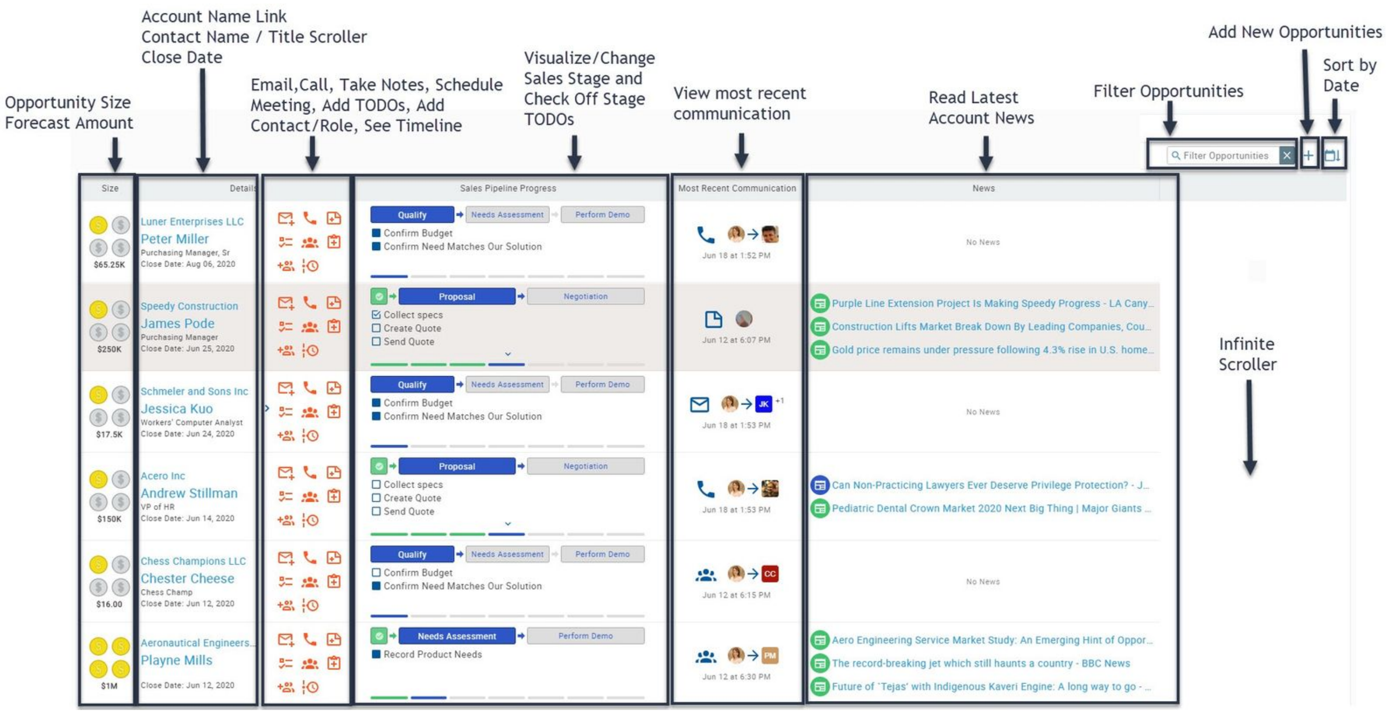
Calendar: Integrate with your Google Calendar to track and visualize your activities in one place.

Notifications: An internal chat system enabling easy collaboration within the Veloxity CRM system.

Recent Places: A chronological history of the last 15 Veloxity CRM web pages you visited.

Click the VELOXITY logo to return home.

The Hub



What is the Hub?

Find all the information you need in one place. The Hub centralizes your data and activities. View and add Opportunities, update information, and create activities all from the Hub.

Velоxity Hub centralizes your sales data and activities all in one place.

How Can I Use the Hub?

- View Account Information (B2B)
- View Opportunity Information (B2C)
- Create Activities
- Add New Opportunities
- View and Edit the Close Date
- View and Update Contact Information
- View and Edit Forecast Amount
- Read the Latest Account News
- View the Most Recent Communication
- Visualize the Opportunity Size
- Quickly Filter Opportunities
- View and Update Sales Stage Progress
- Sort Opportunities by Close Date
- Sort on Any Column
- and more

The Hub

How can I...	Step-by-Step Instructions

Add an Opportunity?

1. On the **Hub Toolbar**, click +.
2. Enter Opportunity details.
3. Click **Add Opportunity**.

Update the Close Date?

1. Navigate to the Opportunity where you want to update the Close Date.
2. Click the **Pencil** to the right of the close date.
3. Edit the Close Date.

Update the Sales Stage?

1. Navigate to the Opportunity where you want to update the Sales Stage.
2. On the process view, directly click the *Sales Stage* to update the Opportunity.

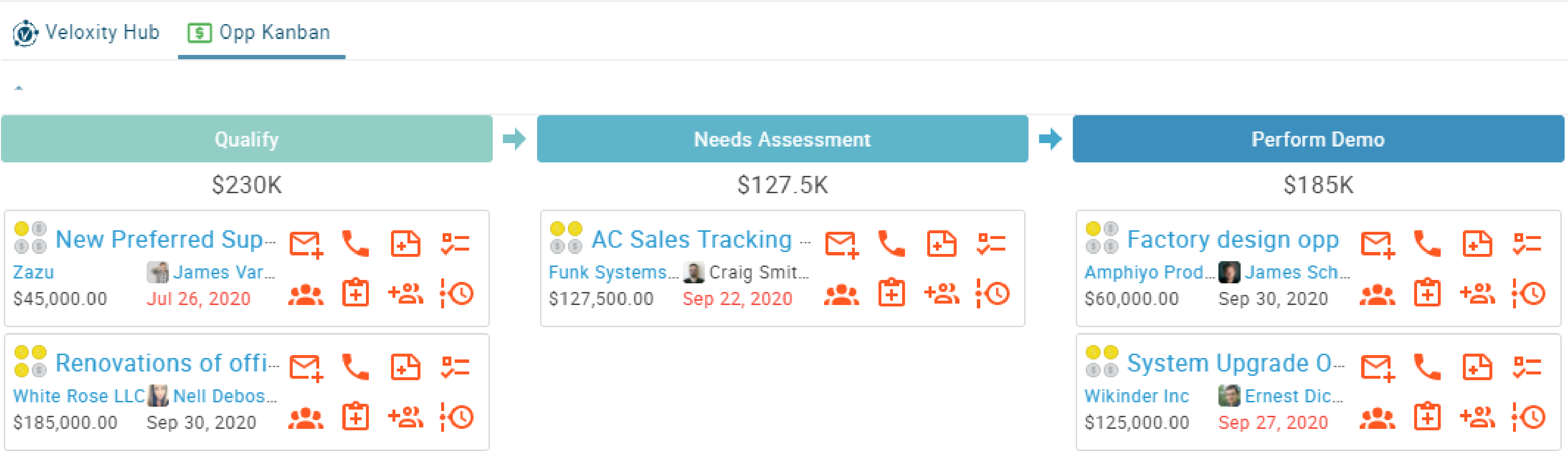
Create an Activity?

1. Navigate to the *Opportunity* where you want to create an activity.
2. On the Activities Panel, click the *Activity* you want to create.
3. Enter *Activity Details*.

View the Timeline?

1. Navigate to the *Opportunity* where you want to view the Timeline.
2. On the Activities Panel, click the **Timeline** symbol.

Opportunity Kanban



Drag and Drop Opportunities on the Opportunity Kanban to move them to the next stage on the Sales Pipeline.

What is the Opportunity Kanban?

What is an Opportunity?
An Opportunity represents a potential sale to a qualified prospect that you are trying to close.

What is Kanban?
A Kanban system visually organizes your work process by using digital tiles to represent work items. The cards move from left to right through each stage of the sales process. An Opportunity Kanban allows you to quickly visualize your Opportunities as they move through your sales stages.

What is the Opportunity Kanban?
The Opportunity Kanban is made up of a series of different sales stages. Veloxity CRM comes preconfigured with the following sales stages:

1) Qualify
2) *Needs Assessment*
3) *Perform Demo*
4) *Proposal*
5) *Negotiation*

These are the stages a prospect goes through before committing to becoming a customer. Your CRM Administrator can customize these stages to best fit your sales process.

Opportunity Kanban

How Can I Use the Opportunity Kanban?

How can I open an Opportunity Record?
Click an *Opportunity Link* on the Kanban to open an Opportunity Record.

How can I move an Opportunity to the next sales stage?
Click an Opportunity tile to select the Opportunity.
Drag and drop Opportunities to move them between stages.

Regularly updating the stage of your Opportunities is essential for forecasting accuracy, identifying where each prospect is in the sales pipeline, and for collecting data to analyze your sales process.

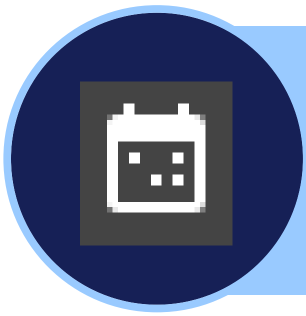
How can I close an Opportunity as Won or Lost?
- Click **Closed** on the Opportunity Kanban.
- Select either **Won** or **Lost**.
- Veloxity CRM automatically records the closing date.

How can I create an activity from the Kanban?
- Navigate to the Opportunity where you want to create an Activity.
- On the Activities Panel, click the *Activity* you want to create.
- Enter *Activity Details*.

Activities

Using Calendar

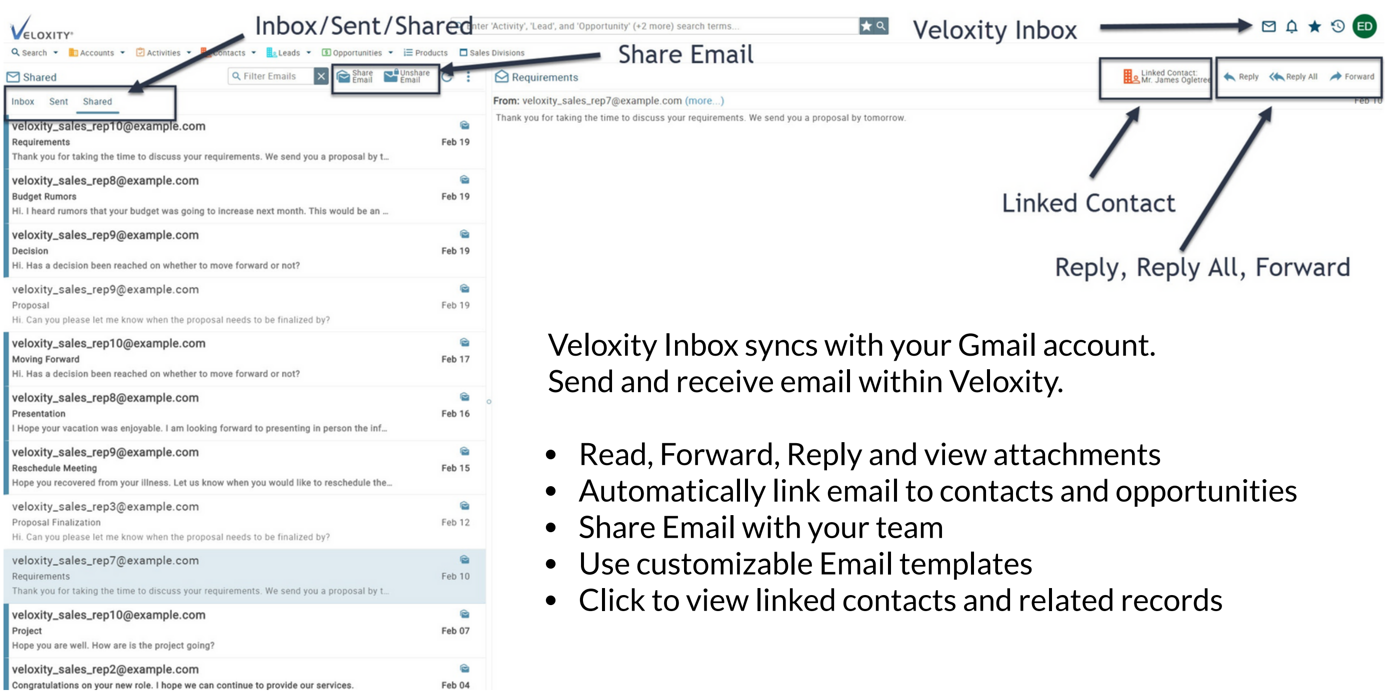
Velozity Calendar integrates with Google Calendar. See all of your activities in one place.
Google Calendar activities are color coded to easily visualize events that originate outside of the CRM.



Use Calendar as your TODO list.

- Switch between month, week, and day view to see your schedule.
- Filter the calendar based on activity type to quickly see all activities of a certain type.

Using Inbox



Velozity Inbox syncs with your Gmail account.
Send and receive email within Velozity.

- Read, Forward, Reply and view attachments
- Automatically link email to contacts and opportunities
- Share Email with your team
- Use customizable Email templates
- Click to view linked contacts and related records

Before using the email and calendar integrations, you must authorize Velozity to sync with your Google Calendar and Gmail accounts.
Click **My Profile** > **Profile Settings** > **Configure Email and Calendar** to set this up.

Activities

Using Timeline

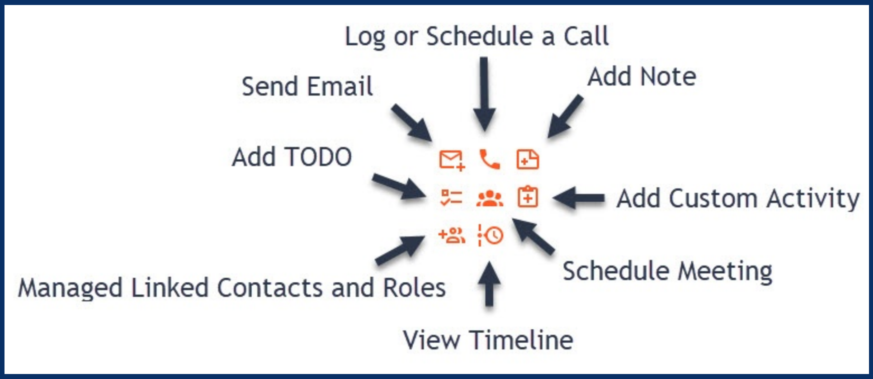
Timeline functions as a concise visual history allowing you to review updates and activities related to your data records.

- Time and date stamps automatically generate when Timeline events take place.
- Read short descriptions of changes made to the data record.
- View activities related to the data record.
- Click the icons and highlighted text to be redirected to those items.
- Hover over links for more details.
- Overdue activities are colored red.

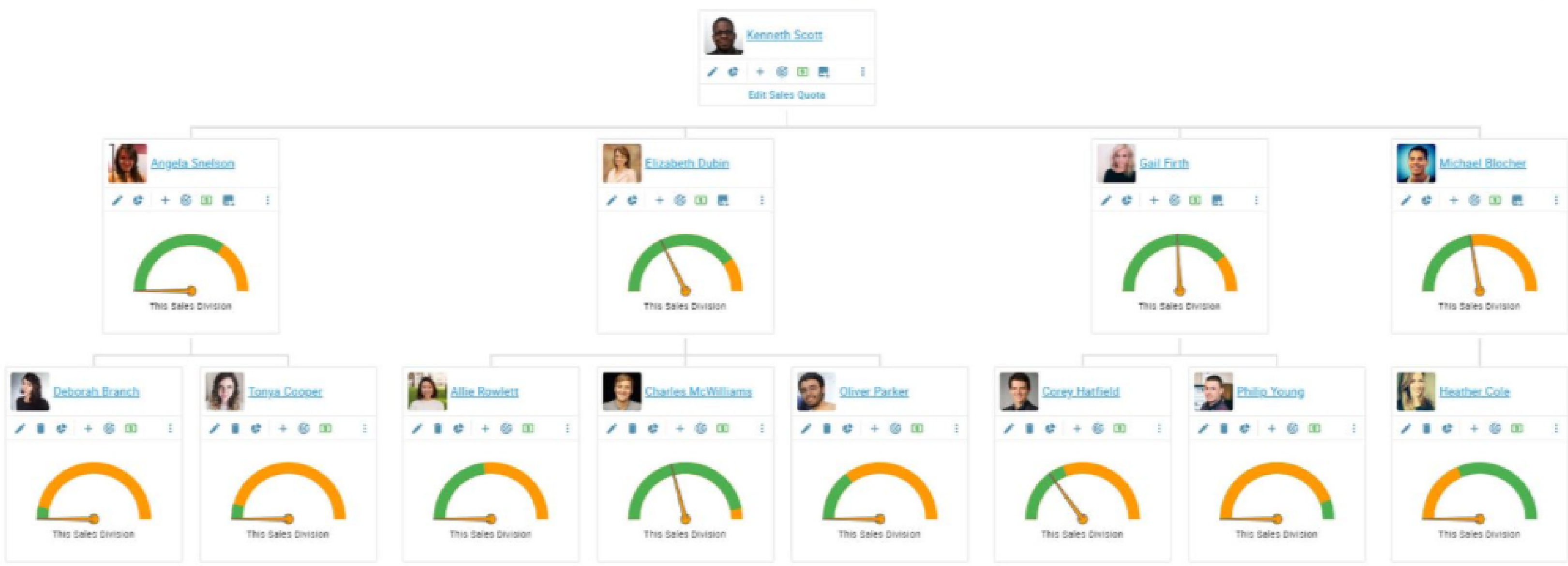
Create Activities

Locate the Activity Panel on the Hub, the Opportunity Kanban, Data Records, and Calendar.

- Click an activity symbol to create a new activity.
- Activities automatically sync with your Calendar.



Sales Divisions



Working with Sales Divisions

What can I learn from Sales Divisions?
Visualize and manage your Sales Divisions using the Sales Division hierarchy.

- For large territory-based organizations, you can view the sales stages at specific territories where all the sub-territories' data rolls up.

- In a direct reporting hierarchy, each account manager is defined as having a direct report sales manager who can view their direct reports and all the reports' data.

Toggle between total forecast charts and relative forecast charts to view data.

Show Relative Forecast Charts	Forecast charts that show only your individual forecast data.
Show Total Forecast Charts	Forecast charts that your forecast data + any data that rolls up to you.

Sales Divisions enable reps and managers to quickly answer the following questions:

- What have I closed? / What has the team closed?
- How am I tracking? / How is the team tracking?
- What do I have to do to get to my quota? / What do we have to do to get to our quota?

Forecasts allow you to predict sales growth and anticipate changing market trends. Forecasts are an important strategy to prepare your business for the future and make more informed business decisions regarding how your team manages resources.

Use the data in Sales Divisions to strategize your activities to meet your sales goals.

Sales Divisions

Working with Quotas and Forecasts

Using Forecasts
Sales Forecasts display your estimated sales income for a given time period based upon the Opportunity Stage, Sales Stage Probability, and the Opportunity Close Date.

Forecast View enables you to see the current progress for each level of your organization's sales structure within each forecast period.

Scroll through different forecast periods:

Using Quotas
Sales Quotas display your sales target for a specific forecast period.

Click  to set a new quota.

Use Veloxity-At-A-Glance charts on sales division records to measure how you are tracking against your quota.

Search

What is Search?
Search allows you to quickly find relevant data in your Veloxity CRM system. Search data is used to back charts, create reports, and locate information. Search is a central feature of Veloxity CRM analytics.

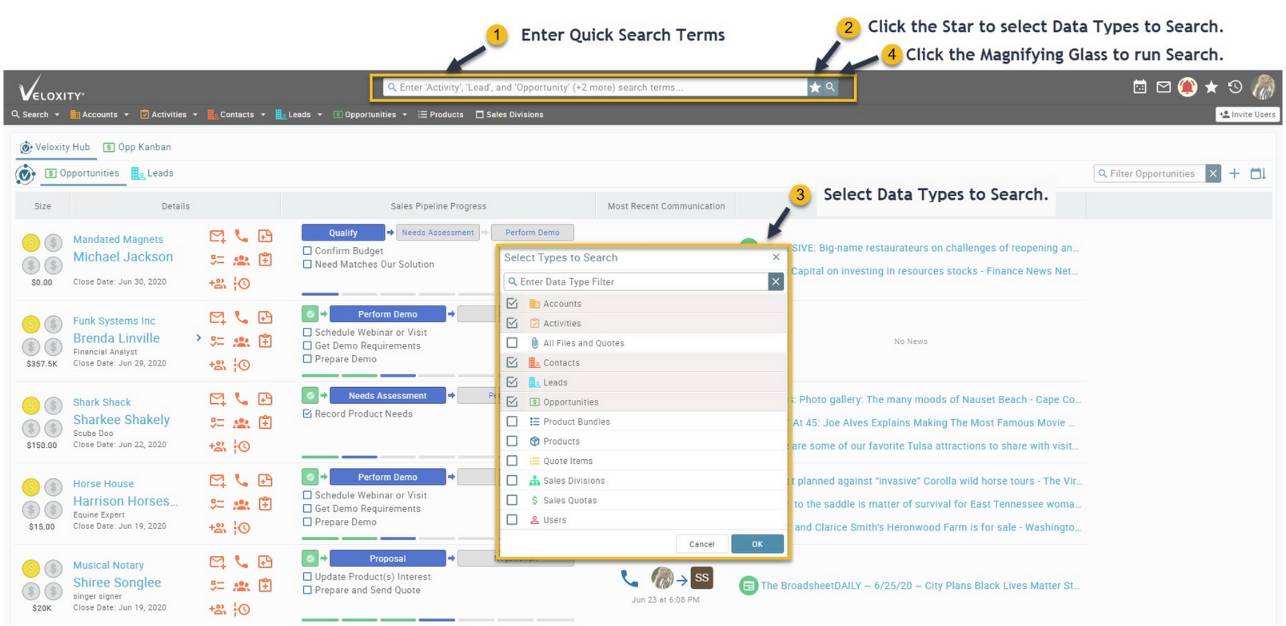
How can I use Search?
Veloxity CRM offers several ways to search:

- Quick Search
- Advanced Search
- Query by Example (QBE)
- Saved Search

Each search type is carefully designed to support non-technical users. Everyone can easily create and execute complex searches without requiring a database expert, programming knowledge, or external tools.

When searching a single data type, try using Target Your Search and *Show Linked Data* to quickly refine your results.

Using Quick Search



Charts

Charts are powerful tools used to analyze your data, find patterns, track goals, create reports, and gain insights into your sales process. Veloxity's At-A-Glance-Charts are quickly customized to visually answer complex questions, at any time, in real-time detail.

One of the keys to successful charting is planning.
- Take a few minutes to determine your most important and frequently asked questions.
- Learn how to create charts that produce answers to these questions.
- Once created, save relevant charts for future use.

Because charts quickly analyze large amounts of data and present the data in clear visualizations, charts make it easy to stay on top of important metrics.

The key to productive charting is asking the right questions.

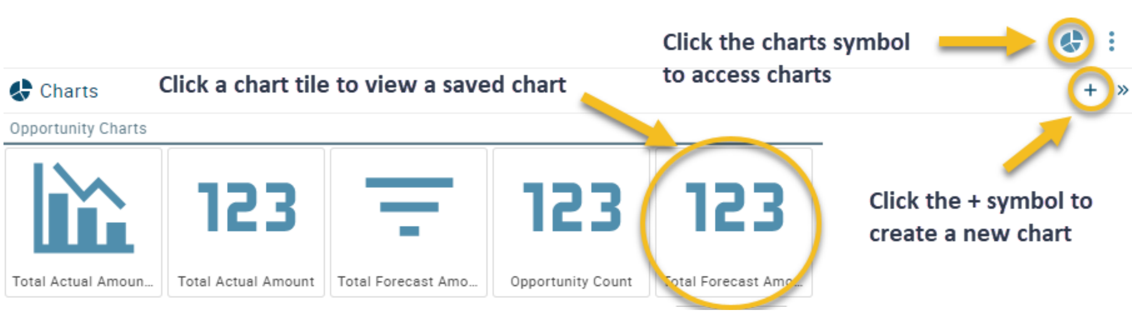
Using Charts

Creating Charts

Create individual, multi-series, and hierarchical charts from any data table. Click the chart symbol to create a new chart.

Using Saved Charts

Select and view saved charts easily. Click the chart symbol to open a suite of saved charts.



Contact Us

Goal Setting

BEFORE you begin learning Veloxity, take a few minutes to focus on why you are learning the application.

- What do you hope to gain from using Veloxity?
- What is the potential payoff of learning Veloxity?
- What problems do you currently face in your job?
- How will Veloxity help you to solve these problems?

Being clear about why you're doing something can improve your learning process.

- What are your sales goals?
- How will Veloxity CRM help you to achieve them?

Brain-based research suggests getting used to a new process takes about three weeks. The best way for most of us to learn new things is to spend shorter, more frequent periods of time studying and then applying the new material. Long stretches spent studying are not as effective.

Being clear about why you are learning this new process, setting goals, and seeing results will get you through the transition.

How do you learn best?

Do you learn by doing? Do you like to have someone show you? Do you prefer to read a manual? Do you prefer images to words?
Whatever your process, we are here to support you.

Whether you like to read, watch videos, study step-by-step instructions with visuals, or skim bullet points to figure things out on your own, we recognize everyone learns technology differently.

Whatever your experience and learning needs,
we are here to help you reach your goals.

VELOXITY

Contact Us

Visit Veloxity.com/support for access to live chat with Veloxity technicians, user forums, and our searchable knowledge base.

We look forward to working with you!

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