CRM HANDBOOK
GETTING STARTED
ACTIVITY SYNC
Create Activity in Efficio from anywhere

1 New Email
Use your desktop, mobile or webmail

2 Add Contacts
add contacts just like any other email

3 Sync Efficio
CC or BCC sync@efficiosolutions.com

4 Send Email
Finish your subject & message then send

Once you send this email, an activity will be created for you in Efficio. This is one of the easiest ways to track tasks.

I am using Activity Sync by Efficio Solutions!

Sincerely,
The Efficio Team
877.333.4246

“IT’s an easy way to put that “next step” on your pending”

Use Activity Sync With
Microsoft Outlook
Google Apps
Hosted Exchange
Mac Mail & Calendar
& many others!
GETTING STARTED

EFFICIO MOBILE

1. Visit efficiosolutions.com
   A: select My Efficio Login

2. Login
   Just like the desktop
   B: your username
   C: your password
   D: select the Login button

3. Navigate
   Learn your way around
   E: mobile navigation menu
   F: quick add button

4. Create Shortcut
   Access Efficio quickly on the go
   G: select the share icon
   H: select the share icon

Use Efficio On The Go

View your Account List
Lookup Account details
Request new Accounts
Add and Edit Pending
Add Activity
View Contact Details
Add Contacts
View Rates
Touch to Call
Touch to Navigation

Follow our blog for mobile enhancements and updates

Screenshots are shown on an iphone, however Efficio Mobile works on all mobile devices
## Account Executives

### Manage Your Account List

- Click Account List in main navigation bar across the top to view your Account List.

- To add a new Account to Effocio, click Account List tab then click the Request New Account tab.

- Fields marked with a red * are required by your management team to ensure you’ve done your homework.

- Only Managers or Assistants can transfer Accounts to/from your list.

### Alerts Will Keep You On Track

- Heads Up summarizes your alerts and is located on the top right of your Home Page.

- Click any of the alerts to drill down and address the alert to make sure everything is in line.

- Red alerts affect your billing.

### Keep Accounts Moving Forward with Activity

- As you work, you can invite Effocio to your meetings or cc emails at sync@efficiosolutions.com. If you invite or cc Effcio and we don’t recognize the contact or Account, we will show a sync problem alert in your Heads Up.

- Click Account List tab, search for the account.

- Click the + on your Home Page calendar.

- When you edit your pending, don’t forget to add your next step activity if required.

### Keep Pending Current

- To Add Pending, start by going to your Account List tab, find the Account, then clicking the + in Pending column to add new Pending.

- Click Pending tab in the navigation bar to view a quick list of all of our Penders.

- When you edit your pending, don’t forget to add your next step activity if required.

### Collections

- Aging is found at the bottom of your Home Page. Click on any number to view detail.

- Click aging tab when viewing the Account Summary to view aging for a particular account.

- Click Financials on navigation bar, then accounts receivable to view summary by account.

### Update Account/Contacts

- Email your new contact vCard to sync@efficiosolutions.com.

- Add contacts from Account Summary, which can be found by clicking the name of the account from anywhere in Efficio.

- Quick update contacts using Contact List under the More navigation option.

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**TIP:** Create activity from your current email and calendar solutions just by inviting sync@efficiosolutions.com.

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**Login to Efficio efficiosolutions.com**

**Use your Desktop, Tablet or Mobile Phone**
**Account Executives**

**Prioritize Accounts**

Heads Up on home page will show any account priority issues. You can click there to determine the problems.

Click account list then go to tools (upper right) to find your account priority grid and how many accounts you have in each category.

Quickly update an account’s category from your account list by clicking the arrow in far left column.

**One-on-One**

Be prepared to talk about your financials as found on the home page, based on where you are to goal and how much pending you have to reach your goal.

Be prepared to talk about Keys and Targets.

Managers commonly use your home page so keep up with alerts.

**Billing Attrition**

New/Returning/Non-Returning report can be found under the Financials tab on the navigation bar, under Account Billing.

Top 10 information of Attrition and non returning can also be found on your Home Page and your Financials landing page.

**Keep your goals in sight**

To Add Pending, start by going to your Account List tab, find the Account, then clicking the + in Pending column to add new Pending.

Click Pendings tab in the navigation bar to view a quick list of all of our Pendings.

When you edit your pending, don’t forget to add your next step activity if required.

**TIP:** Keep an eye out for the account violation heads up alerts on your home page to keep your account list clean.