MH PE iPad Help File

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Welcome

Welcome

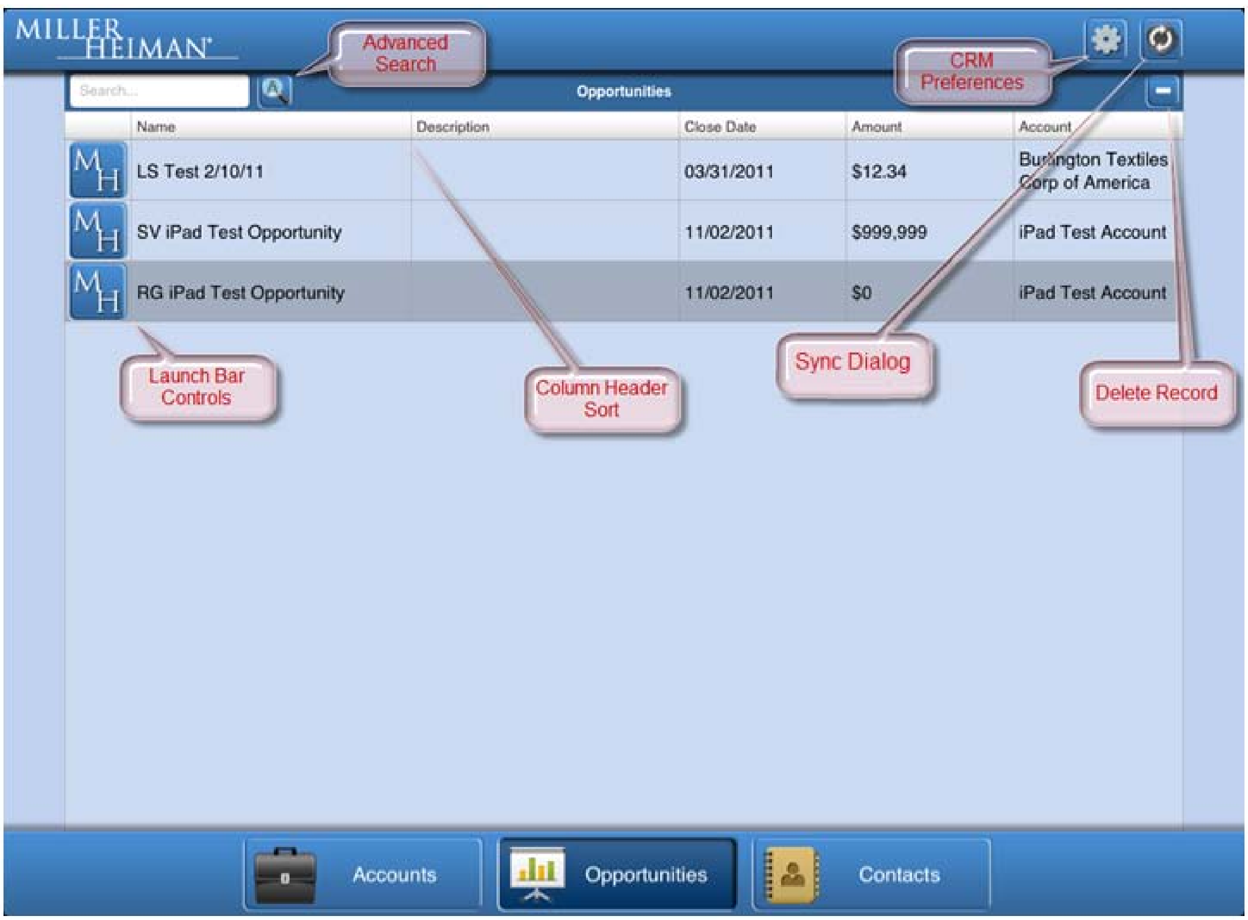
Miller Heiman's Sales Access Manager℠ Personal Edition iPad encourages interactive use of the Strategic Selling® process using an iPad device.

Utilization of the tool reinforces the processes learned in Strategic Selling®.

Users must be an alumnus of one of the Miller Heiman methodology in order to utilize the Sales Access Manager℠ Personal Edition strategic planning sheets. Your alumni history is recognized by Miller Heiman with the creation of an alumni account. If you have not created one, then please click here.

Getting Started

Press the “Opportunities” button to display the MH PE Opportunities Dashboard screen.



Opportunities Dashboard

Search & Advanced Search

Search by typing any part of the column fields in the search field to filter the display of iPad opportunity records. Clear the Search field to view all iPad opportunities again.

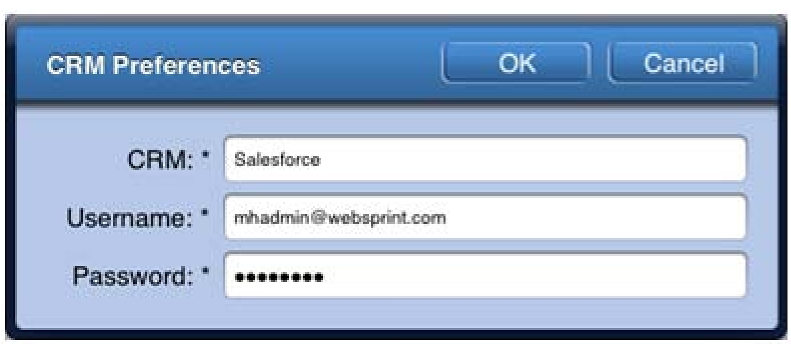
Click the Advanced Search icon to search currently displayed CRM records by criteria entered for any columns of the opportunities table.

Search & Advanced Search

CRM Preferences

Click the CRM Preferences icon to launch a dialog to set CRM login details. This information needs to be filled in prior to downloading any opportunities, so the iPad can connect with the CRM.

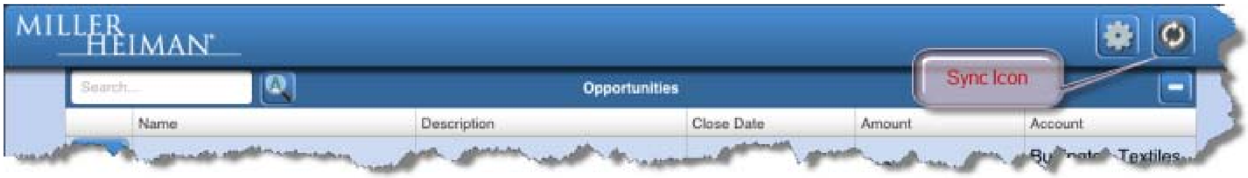
CRM Preferences Icon



CRM Preferences Dialog

Sync - Download / Upload

Click the Sync icon to launch a dialog window to either download Sheet data to the iPad from the CRM, or upload Sheet data to the CRM from the iPad.

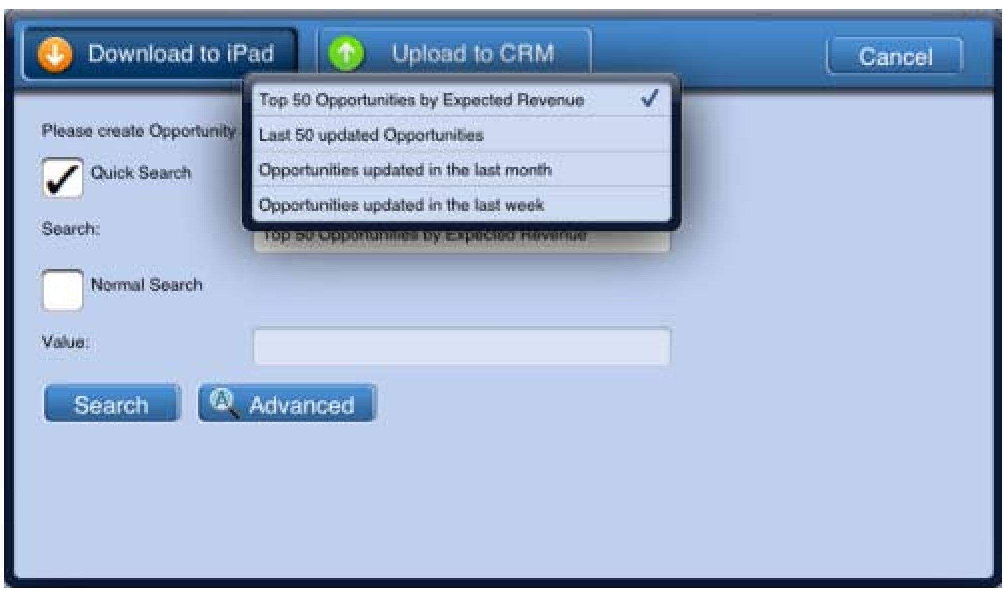


Sync Icon

o Blue Sheet data needs to be downloaded to the iPad before it can be accessed & edited.

o Basic Search

- Quick Search defaults to “Top 50 Opportunities by Expected Revenue”, however tapping in the input field displays the pick list of options. Tap any row to select.
- Normal Search will search all CRM Opportunities for the value you type in on all of the CRM Opportunity fields.



Download / Upload Dialog

o Advanced Search – allows you to select the following:

- Choose the maximum number of records you wish to be returned.
- Choose the field you would like to search by.
- Choose the condition (which is specific to the field type i.e. a Date Field shows conditions relevant to a date, but not conditions relevant to a string).

- Choose the value you wish to search by (which is specific to the field type, i.e. when a Date field is selected a date picker will show when the value field is selected. When a currency field is selected, the value will format as a currency).
- Tap Search to begin searching for opportunities once you have entered the desired search criteria.
- Once the search has completed, a list of opportunities will display in a table; tap any of the opportunities to select for download. A check mark will appear to the right for all selected rows. Note that a maximum of 10 opportunities may be downloaded at once.

Download Dialog Opportunity List

o Press the “Download” button when finished selecting opportunities. A status message will appear while downloading.

Downloading Opportunities Status Message

o Downloaded opportunities display in the Opportunities Dashboard when downloading is finished. Note that if a downloaded opportunity is associated with an account, then the account and all associated contacts will also be downloaded to the iPad.

Opportunities Dashboard

o In the event that any CRM updates are made to downloaded opportunities, a red dot will appear in the MH launch logo indicating the record is out of date.

Downloaded Opportunities Out-of-Date indicator

- Launching an out-of-date opportunity will display a dialog prompting you to Launch the Blue Sheet without downloading the latest version, Download the latest version, or Cancel launching the Blue Sheet.

Opportunity Out-of-Date Dialog

- Downloading the latest version will overwrite any Blue Sheet updates you have made on your iPad with the latest CRM data, and will display a progress bar of the download status. If you choose to upload your iPad version to the CRM before downloading the latest CRM version, than any Blue Sheet updates made in the CRM will be overwritten with your iPad version.

Downloading Opportunity Status Message

o Tap to highlight any row and tap the blue arrow on the far right to view opportunity data. In the dialog shown, postal and website addresses are shown in blue; bold text and can be tapped to launch either a map view of the address or a browser showing the website.
o Blue Sheet data needs to be uploaded back to the CRM when editing is completed.

- Tap the “Sync” button to launch the “Download/Upload” dialog.
- Tap the “Upload to CRM” button to switch dialog to upload mode.
- Tap any opportunities to select for upload. A check mark will appear to the right for all selected rows. Up to 10 Blue Sheets/Opportunities can be uploaded at one time.
- Press the “Upload” button to begin uploading data. A status message will appear while uploading.
- Once the upload is completed – the selected records are displayed in a table in the dialog along with their upload success status. Note, the records are sorted by Last Updated date in descending order.

Upload Dialog - Opportunity List

Delete Record

Click the Delete Record icon to remove the currently highlighted opportunity from the iPad.

Note: Use caution to avoid loss of data by deleting any Sheet data before it has been properly saved and uploaded back to the CRM.

Delete Record Icon

Sort Table Rows

Sort any table by clicking on one of the table column headers. Opportunities can be sorted by Name, Description, Close Date, Amount, or Account.

o Sorting is possible on all table columns except the Ideal Customer Criteria table.

o Tap the column header once to sort rows in ascending order, tap the same column header a second time to sort rows in descending order, and tap the same column header a third time to remove the sorting.

Sort Table Rows by clicking Column Header

Launch Bar Controls

Tap the "MH" logo to launch the Blue Sheet in a tab.

MH Logo to Launch Sheet

A Silver Bar will appear on the left with the following controls:

o  Right arrow : maximizes the Blue Sheet.

o  Left arrow : minimizes the Blue Sheet.

o  “X” : closes the Blue Sheet.

o Silver Bar : drag right/left to show portion of the Blue Sheet.

o Touch/hold Silver Bar to “wiggle”, then bar can be moved to other side of screen if desired.

o Two Blue Sheets can be viewed simultaneously by dragging each Blue Sheet’s silver bar tab to the middle, then scrolling within each Blue Sheet

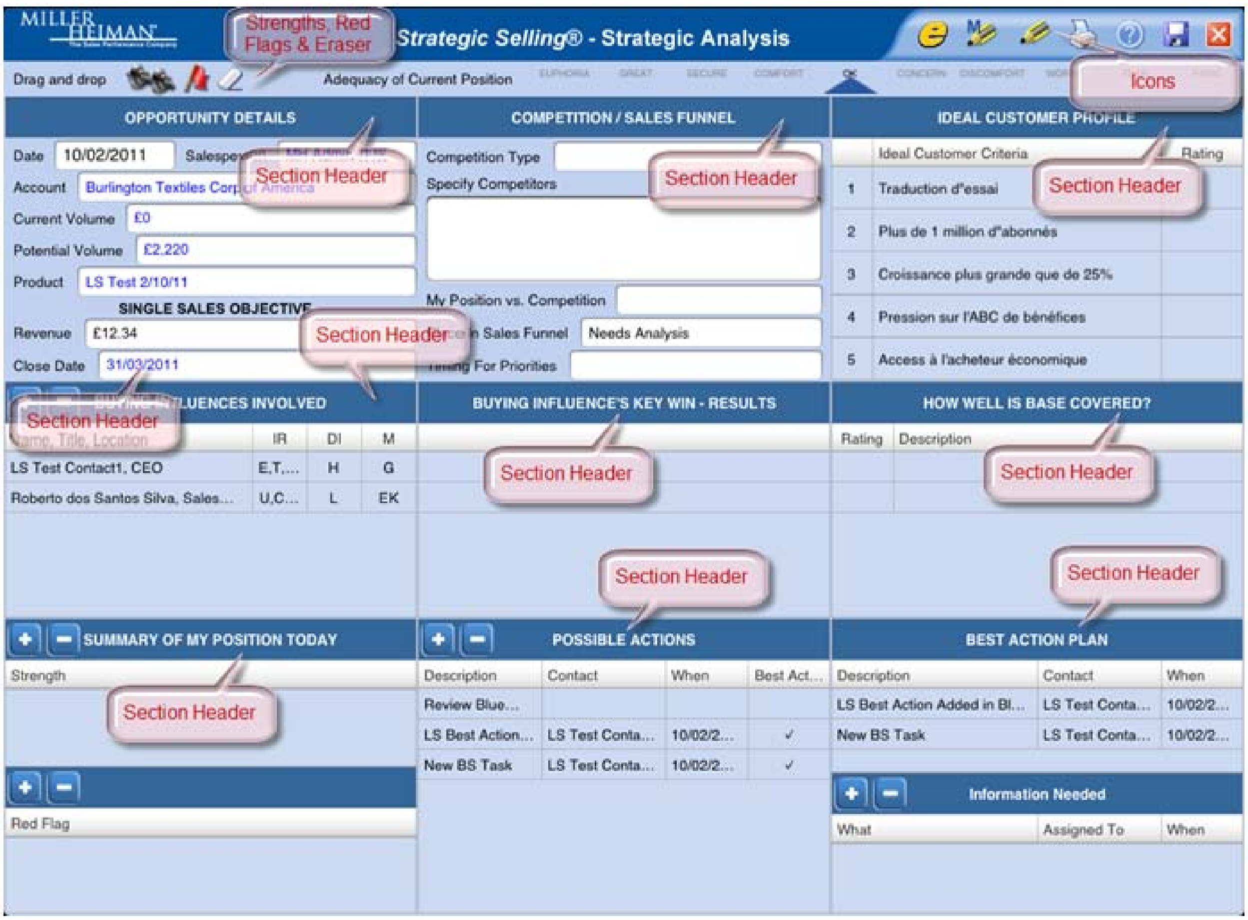
o Four opportunities can be open simultaneously (two tabs per side).

Silver Bar – Sheet Controls

Features & Functions

Features & Functions

This section covers the Features & Functions of the Miller Heiman PE iPad Blue Sheet:



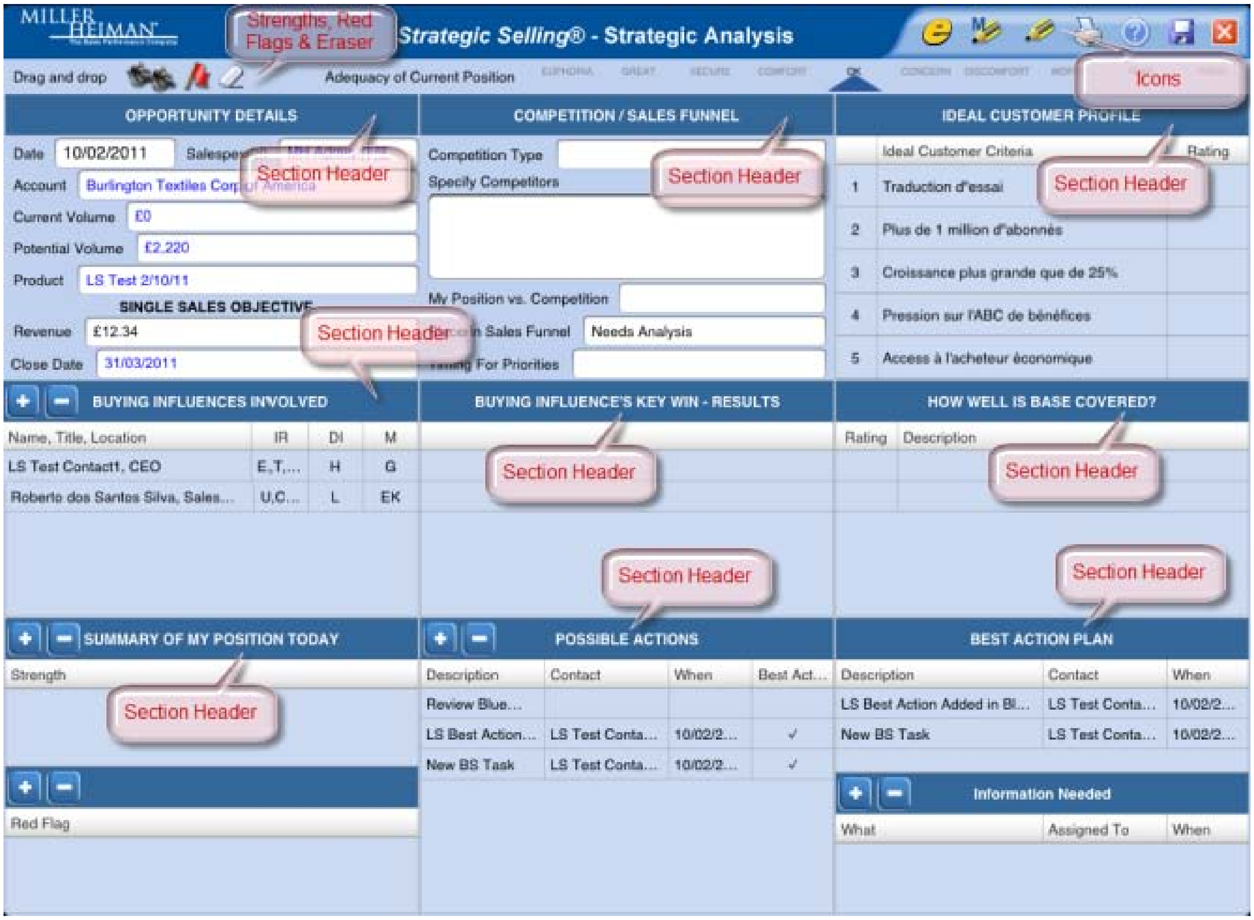
Blue Sheet

Section Headers

Tap any section header to launch eLearning specific to that section. There are a total of nine separate eLearning URL's:

- o Opportunity Details
- o Competition / Sales Funnel
- o Ideal Customer Profile
- o Buying Influences Involved
- o Buying Influence's Key Win - Results
- o How Well Is Base Covered?

- o Summary of My Position Today
- o Possible Actions
- o Best Action Plan



Blue Sheet Sections which launch specific eLearning content

eLearning Sample from the Blue Sheet "Opportunity Details" Section

Full Screen Dialogs

Any table dialog can be viewed in full screen mode by pressing & holding the section header containing the table.

Example of Full Screen Dialog for the Possible Actions section

Strengths & Red Flags

One Strength or Red Flag icon can be applied to each field of the Blue Sheet.

Strength, Red Flag & Eraser Icons

Touch and drag the Strength or Red Flag icon to the desired field. When the flag target area is red, then the flag cannot be applied. When the flag target area is white or clear, then the flag can be applied.

Examples of when a Strength or Red Flag icon cannot be applied (Red) and when it can (white or clear)

Touch and drag the Eraser icon over any Strength or Red Flag icon to remove it from the Blue Sheet..

Icons

Tap to select any of the following icons:

eLearning – launches the MH eLearning courses login page.

Manager's Notes – launches the Manager's Notes dialog; scroll down to view all inputs, along with the Manager Review Date.

Additional Notes – launches the Additional Notes dialog.

Print PDF – launches the Print dialog.

Help – launches the user help file.

Save – saves the Sheet data to the iPad; a message displays when data has successfully saved.

Close – closes the Sheet.

Add – adds a row to a table.

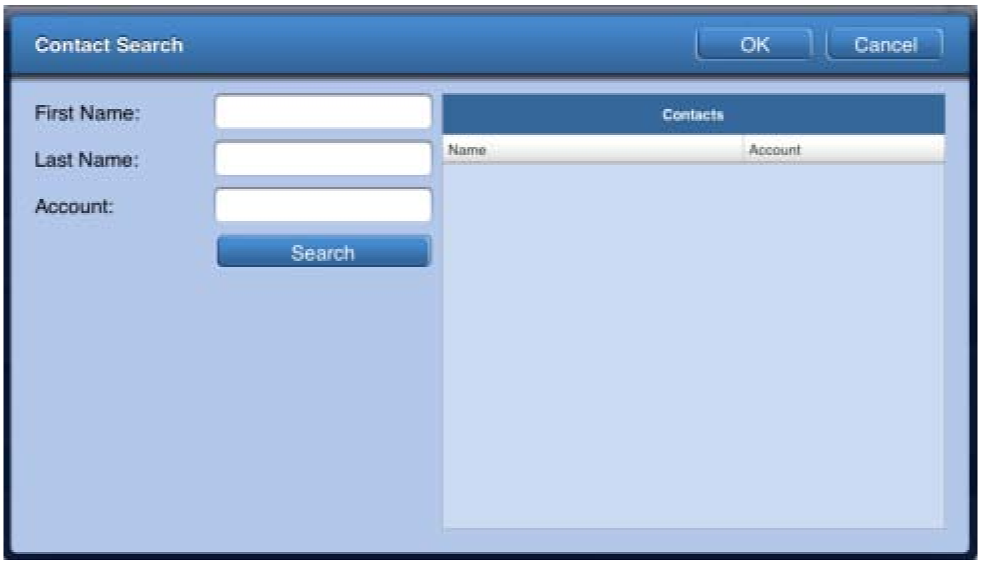
Remove – removes a row from a table.

Blue Sheet Icons

Contact Search

In any dialog where there is a field allowing selection of a contact, tap the appropriate field to show a pick list of existing contacts and tap “Search” to launch the Contact Search dialog (online only).

All CRM org contacts can be searched while online & connected to the CRM.



Buying Influence – Contact Search dialog

Pick Lists

Tapping a field with an associated pick list will display the pick list. If the pick list allows only one item to be selected, tapping an item will select the item and then dismiss the pick list. If multiple items are allowed to be selected, tap to select the items and then tap outside the pick list to dismiss it.

Buying Influence – Role pick list

Calendar / Date Fields

Tap a date field to display the calendar and to select a date.

Date field – Calendar Select

Screen Shots

A screen shot can be saved to the iPad by pressing the Home & Power buttons simultaneously. The .PNG images can be accessed and copied when the iPad is connected to a computer.

Start-up Wizard

A start-up wizard automatically launches when MH PE is opened. The wizard can be disabled by either cancelling the wizard and choosing “No” on the following prompt, or by accessing the MH PE settings located in the “Settings” option of the iPad desktop.

The following options can be set in Settings:
o Start-up Video on/off

o CRM Login Username
o CRM Login Password

Crash Recovery

Because the MH PE application uses a significant amount of memory, especially when downloading & uploading data, the application may crash at times. When this occurs, it is recommended that you close the application from iPad memory so that it opens fresh and with the maximum memory available for the next time.

From the iPad desktop screen, where the icons are displaying, double press the Home button and a list will appear along the bottom. Press and hold the MH PE icon until it wobbles, then press the "-" to close it from memory. Press the home button again to close the list.

Custom Fields

Any of the custom Account, Opportunity, or Contact fields within your CRM org can be selected to download to the iPad. By default, none of the custom fields download, however this can be changed at any time by your system administrator. Whenever a change is made in the set-up by your administrator, any Opportunity record will need to be re-downloaded to the iPad for the custom field(s) to be included. Downloading the Opportunity also downloads the associated Account and Contact information.

To view any of the CRM custom fields, select an Account, Opportunity, or Contact record and then tap the  button on the right side of the row to display the Record View dialog.

Click the Record View Dialog Button to view the CRM Opportunity Record Details

Example of the CRM Opportunity Record Details

Tips & Troubleshooting

Tips

o <u>Copying/Pasting on the iPad</u>
Data can be copied & pasted on the iPad by doing the following:

> **Copy**: Press/hold the text you wish to copy, then a button group will appear prompting you to "Copy", "Select All" or "Exit/Cancel". Text selections can be edited by dragging the anchor points at the start or end of the highlighted selection. When satisfied, select the "Copy" option.
>
> **Paste**: First there must already be something copied (otherwise the Paste option is disabled), then double tap in the input field you wish to paste into, and select the "Paste" option from the button group.

o <u>iPad screen keyboard & Sheet functions</u>
Sometimes when the keyboard on the iPad screen is open or engaged, users may not be able to access all functions on the Sheet. For example, like pressing the "Create CRM Activity" button within the Information Needed section, or clicking the check box within the Possible Actions dialog. This is because the keyboard (when open) is covering all or part of the Sheet object. Dismiss the keyboard by clicking on the "keyboard" icon in the bottom right, which then allows access to all Sheet objects.

o <u>Screen Shots</u>
A screen shot can be saved to the iPad by pressing the Home & Power buttons simultaneously. The .PNG images can be accessed and copied when the iPad is connected to a computer.