

CRM

Making the most of the CRM

Update Contact

Title: Mr
 First Name: Andrew
 Last Name: Millard
 Position: Chief Financial Officer
 Company: Admiralty Charts Limited
 Address: The United Kingdom Hydrographic Office, Admiralty Way, Taunton, Somerset
 Postcode: [redacted]

Telephone: [redacted]
 Website: [redacted]
 Email: [redacted]

Projects: Project Example 1
 Project Example 2
 Project Example 3

Buttons: Update CRM Contact

Events will appear in your GOOGLE or OUTLOOK calendar per your selection in the setup menu

Automatically Open PDF in separate pop-up pane

Calendar Integration: Google Outlook

Events are programmed here .

Add Event

Select date: 2022-03-11
 Event: Zoom Call

Buttons: Close, Add

Events that suit your business pattern are defined here .

Events

Send NDA in post
 Telephone
 Zoom Call

Event Name: [input]
 Button: Add

Projects are managed here

Projects

Last Import
 Working List
 Project Example 1
 Project Example 2
 Project Example 3

Project Name: [input]
 Button: Add

Contacts can be selected from USP Data, entered directly into a project or selected from the find a firm side tab.

Add Note

Notes: This is an example of a note

Buttons: Close, Add

A series of notes can be recorded for any contact

CRM

Company Records

Search for company name, event dates, type of Event, pe

Contacts : Project Example 3 - 24 contacts found

Company	Name	Telephone	Email	Website	Address1
Admiralty Charts Limited	Mr Andrew Millard				The United Kingdo
B.cooke & Son,limited	Mrs Sheena Paddison			http://bcookeandson.uk/	58/59 Market Plac
Charity & Taylor (Electronic Services) Limited					
Euronav Limited					

Notes: [No Notes found]

Programmed Events: [No Events found]

Ultimate Parent (UP), Parent (P), Subsidiaries (S)

Directors & Company Sec.

Shareholders

Address: The United Kingdom Hydrographic Office, Admiralty Way, Taunton, Somerset, TA1 2DN

Project lists can be exported as a spreadsheet with your data where it exists or default USP Data

Project Project Example 3

Select Address Type: Registered Office Address Trading Address

Sort order of Director chosen: Director with Largest Number of Shares Director with Shares Director Level 1 (MD, CEO, CE) Director Level 2 (FD, SD, VP) Oldest Director Youngest Director

Buttons: Close, Export List

Organise your data in a PROJECT. You can make calendar appointments, edit your own data, add notes & link your data to the latest USP information. The CRM is where you save any list you are working on, enabling incremental advances in refinement and focus.

Search listings from the workspace can be saved into or retrieved from any CRM project

USP DATA

Industry Sector Selector

Last Import
 Project Example 1
 Project Example 2
 Project Example 3
 Working List

Sector Criteria Selected: Project Example 3

Buttons: Add to report, Exclude from report

Company Count: 5,039,477