

Contact Information

Company

First Name

Last Name

Job Title

Phone

Mobile

Preview

Contact Information

Company:

First
Name:

Last

Html Code To Copy

```
<script language="javascript" src="k
```

Files

 ▼

Name



Wind and Wave Proposal

Wind and Wave Proposal.pdf | 0B



Needs Analysis Template (Updated 2016)

Needs Analysis - Template.docx | 12.4KB



Needs - Analysis (Sun Core) June 8

Needs Analysis - Sun Core - June 8.docx | 12.4KB

 ▼

Tasks

<input type="checkbox"/>	Name	Status	Due Date	%
<input type="checkbox"/>	Review draft proposal	In Progress		0
<input type="checkbox"/>	Prepare and send proposal	In Progress	Nov 03	0
<input type="checkbox"/>	Review Needs Analysis	In Progress	Nov 04	0
<input type="checkbox"/>	Prepare proposal	Completed	Oct 26	0

Twitter

With over 75 million Twitter users, you're bound to find conversations from all over about your industry, competitors and you.

- Monitor & Respond to Tweets about your Company, Industry or Competitor.
- Engage Twitter users for initial sales and follow-on customer support.
- Automatically create new Leads based on a Tweet or Conversation.
- Share Knowledge with others on Twitter.

Search Term	Miles	Location
architecture		
historic architecture	50	Vancouver

To narrow your search, specify a location around it in miles. Otherwise, leave it blank.

Filter	Type
modern architecture	TweetText
modernarch	FromUserScreen

Filter out any repetitive or unwanted tweets that match either a word/phrase or username.



Rooftop Architecture Film Series: My Playground, 2010 <http://t.co/ptEKfrqtjY> 4/24 8 pm @AMOA_Arthouse \$10

AustinFreeEvent. 23 Apr 12:50 AM GMT | | Search Term: architecture

[Reply To](#) | [Direct Message](#) | [Re Tweet](#) | [Convert to Lead](#) | [Delete](#)



RT @JustArch: +1RT #Architecture #Design - Our Exclusive ILMA Interview with @Abadi_Access cc @AIANational @ladyaia @Parthenon1 <http://t.co/XJXPERSaTM>

Parthenon1. 23 Apr 12:50 AM GMT | | Search Term: architecture

[Reply To](#) | [Direct Message](#) | [Re Tweet](#) | [Convert to Lead](#) | [Delete](#)



Okai, I love architecture, I love buildings, and I am in deep love with art, with beauty, creativity! But still not completely convinced!

ShadvaAlaa. 23 Apr 12:50 AM GMT | | Search Term: architecture

[Reply To](#) | [Direct Message](#) | [Re Tweet](#) | [Convert to Lead](#) | [Delete](#)



compare and contrast: <http://t.co/KaUFHsFI3X> & <http://t.co/ibxCtwq8KA>

locks. 23 Apr 12:50 AM GMT | | Search Term: architecture

[Reply To](#) | [Direct Message](#) | [Re Tweet](#) | [Convert to Lead](#) | [Delete](#)



ReelRandi You should check out <http://t.co/foWKj9gugX> They are architecture pics w/ funny captions about the photo. You might #lol!

mattlangevin. 23 Apr 12:51 AM GMT | | Search Term: architecture

[Reply To](#) | [Direct Message](#) | [Re Tweet](#) | [Convert to Lead](#) | [Delete](#)



@MayralejaU Sadly, is a result of bad architecture.

igonzalez93. 23 Apr 12:51 AM GMT | | Search Term: architecture

[Reply To](#) | [Direct Message](#) | [Re Tweet](#) | [Convert to Lead](#) | [Delete](#)

- Meeting
- Call
- Email
- Milestone
- Follow Up
- Expected Close

day ▼ 10/30/2016 - 11/5/2016

Sun, 30	Mon, 31	Tue, 1	
Follow Up with Karamu Holdings Ltd	Client Meeting - Maxville Road Works		Expect Winds
Proposal Review - Windsor Aggregates			Follow Road
27	28	29	30
Expected Close with Karamu Holdings Ltd			

[EXPORT TO PDF](#)[EXPORT TO EXCEL](#)[EXPORT TO WORD](#)

1

of 1



Find | Next



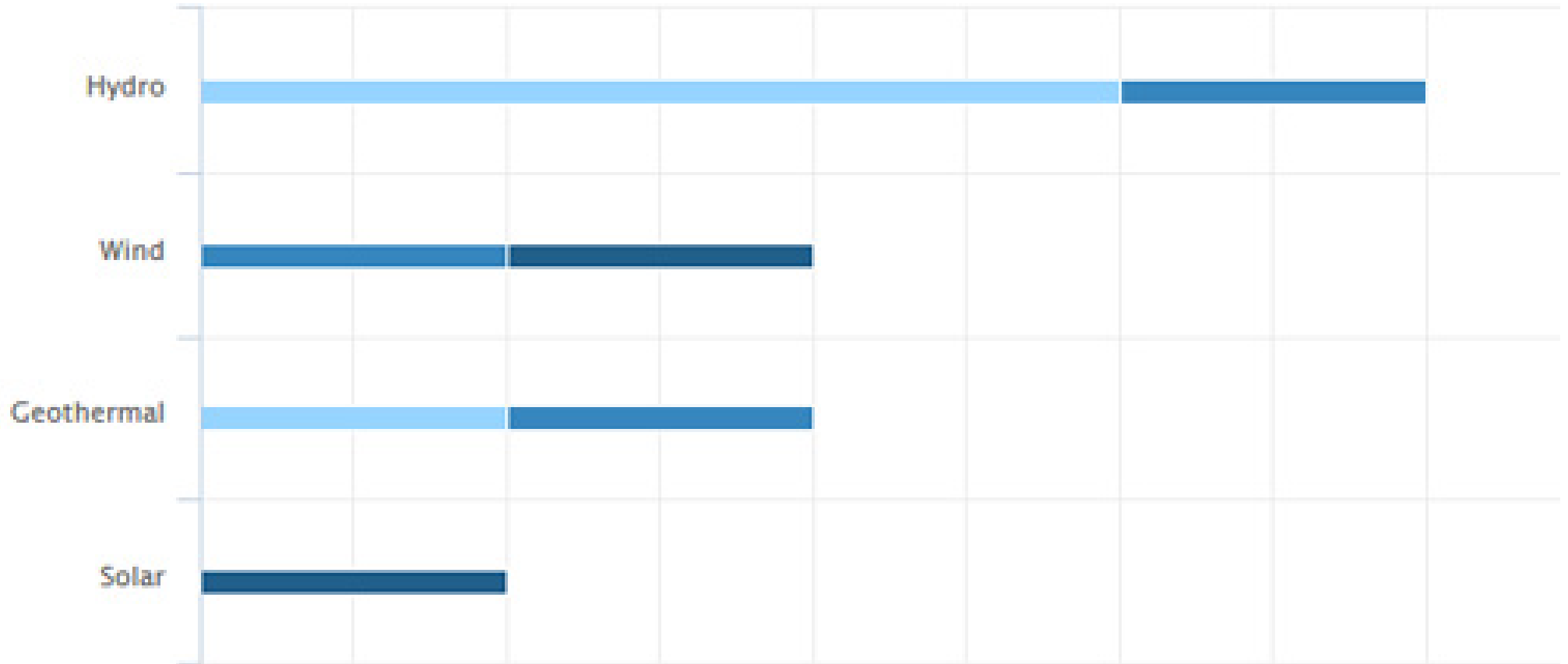
Opportunities



Custom Detailed Report

Name	Stage	Status	Scale	Source
Southridge Electrical Distributors	Negotiation	In Progress	Warm	
Back to Basics Offgrid	Proposal	In Progress	Warm	
Offgrid Ag Solutions	Proposal	In Progress	Warm	
Brightspark Supplies	Proposal	In Progress	Warm	
Northland Alternative	Needs Analysis	In Progress	Hot	
Downunder Mobile Power	Needs Analysis	In Progress	Warm	

Product Category



Total sales pipeline activity

Leads Opportunities Accounts

What are you working on?

Post

Adam Browning created a new Opportunity! [Northland Alternative](#). Posted 4 hours ago. [Comment](#) [Delete](#)

Adam Browning created a new Opportunity! [Downunder Mobile Power](#). Posted 4 hours ago. [Comment](#) [Delete](#)

Darin Echeverria created a new Opportunity! [Energy First Supplies](#). Posted 8 days ago. [Comment](#) [Delete](#)



Brandon Jasso Darin - Did you end up speaking with Juan at Energy First? Posted 8 days ago. [Delete](#)

Darin Echeverria created a new Account! [Whirl Energy Systems](#). Posted 8 days ago. [Comment](#) [Delete](#)



Adam Browning Nice, thanks for getting that setup Darin. Posted 8 days ago. [Delete](#)

Garry White created a new Lead! [Power on Demand Inc.](#). Posted 8 days ago. [Comment](#) [Delete](#)

thanks for the meeting earlier today

◀|CANCEL

|X|DELETE

To:

CC:

From: info@simplesalestracking.com

Date: Oct 22,

Owner: Otwell, Elaine

Subject: thanks for the meeting earlier today

Body: Hi April,

Thanks for the meeting earlier today. I'll get to work on getting you answers to your questions straight away.

Look forward to meeting with you again on Friday.

Best,

Elaine

Elaine Otwell

PEAK ENERGY INTERNATIONAL INC.

elain@peak-energy.net

Opportunity Stages

Customize the Opportunity Stages for your entire team. Keep in mind they should be simple, and reflect the process you use in practice.

Opportunity Stages will be sorted based on % Probability. There's no need to add "Won" or "Lost" as Opportunity Stages, since this is already built in.

Name	% Probability		
Initial Meeting	20	✎ Edit	✕ Delete
Needs Analysis	40	✎ Edit	✕ Delete
Proposal	60	✎ Edit	✕ Delete
Negotiation	80	✎ Edit	✕ Delete
<input type="text"/>	<input type="text"/>	+ Add New	









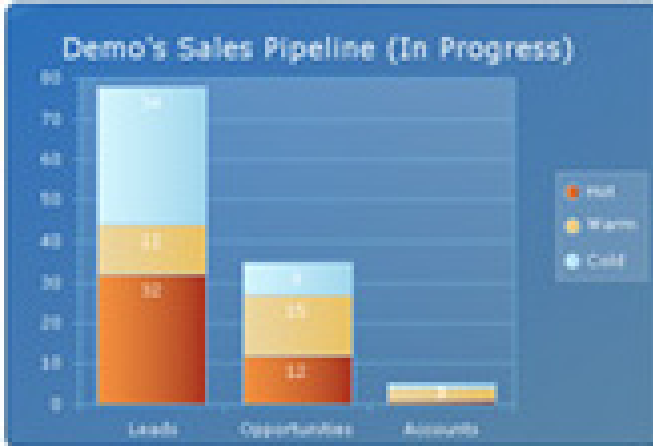
Welcome, **Demo User**

Latest Activity
Demo User created a new Lead! ABC Company Ltd. invited to their site.

Recently Viewed

- Windsor Aggregates
- Karamu Holdings Ltd
- task
- Send media kit
- test url
- Send report sample
- A New Task
- test
- Review requirements
- Windsor Aggregates
- Windsor Aggregates





-  **Create Lead**
Create a new sales lead
-  **Create Opportunity**
Create a new sales opportunity
-  **Create Account**
Create a new sales account
-  **Import Leads**
Import prospects from a file
-  **Import Opportunities**
Import current opportunities
-  **Import Accounts**
Import existing customers



Search

Calendar Reminders



-  Sales meeting with new prospect. Apr 15, 2013 09:00 AM
-  Follow up with Demo over coffee. Apr 15, 2013 11:00 AM
-  Weekly Sales Meet. Apr 16, 2013 09:00 AM

-  **Schedule Appointment**
Schedule a new appointment
-  **Create Task**
Create a new task
-  **Create Contact**
Create a new contact
-  **Menu**

Demos In Progress Sales, By Follow-up

Accounts	Opportunities	Leads
<input checked="" type="checkbox"/> Karamu Holdings Ltd	Warm	Aug 19, 2013 \$5,000.00
<input checked="" type="checkbox"/> Windsor Aggregates	Warm	Sep 15, 2013 \$1.00

Task Reminders

-  Send media kit. Thu 2013 12:00 AM
-  Prepare process plan and contract.

Mobile interface showing a menu:

- Accounts
- Opportunities
- Leads
- Messages
- Calendar
- Tasks
- Contacts

Bottom navigation: Start Page, Search, Recent, About




Manage Your Team Members

Add new users and manage existing ones.

To remove a user, email [support](#) with their email address or username. We will need to know if you

Any permissions you set here will work in conjunction with those you choose for the [Security Access](#)

 [Add New User](#)

	Name	Edit Permissions	Profile
	Ball, Deborah deborah@peak-energy.net Reset Password	<input checked="" type="radio"/> Edit any records <input type="radio"/> Edit only their own records <input type="radio"/> Read-Only	Active
	Browning, Adam adam@peak-energy.net Reset Password	<input checked="" type="radio"/> Edit any records <input type="radio"/> Edit only their own records <input type="radio"/> Read-Only	Active Manager Admin
	Echeverria, Darin darin@peak-energy.net Reset Password	<input checked="" type="radio"/> Edit any records <input type="radio"/> Edit only their own records <input type="radio"/> Read-Only	Active

Wright, April
MD at SunCore



Phone: 605-329-8816

Fax: 605-329-7716

Mobile: 605-329-6616

Email: april@suncore.io

Website: suncore.io

Owner: Otwell, Elaine

Physical Address

[view map](#)

1348 Elsie Drive
Frederick

Edit

Add a Note

Add a Note to this Contact

Save



[Start Page](#)
[Accounts](#)
[Opportunities](#)
[Leads](#)
[Messages](#)
[Calendar](#)
[Tasks](#)
[Files](#)
[Contacts](#)


Welcome,
Adam Browning

Latest Activity

Adam Browning created a new Opportunity! Southridge Electrical Distributors. Posted a few moments ago.

[Create a New...](#)

New Opportunities

\$86,000

past 7 days (6 total)

\$176,000

past month (12 total)

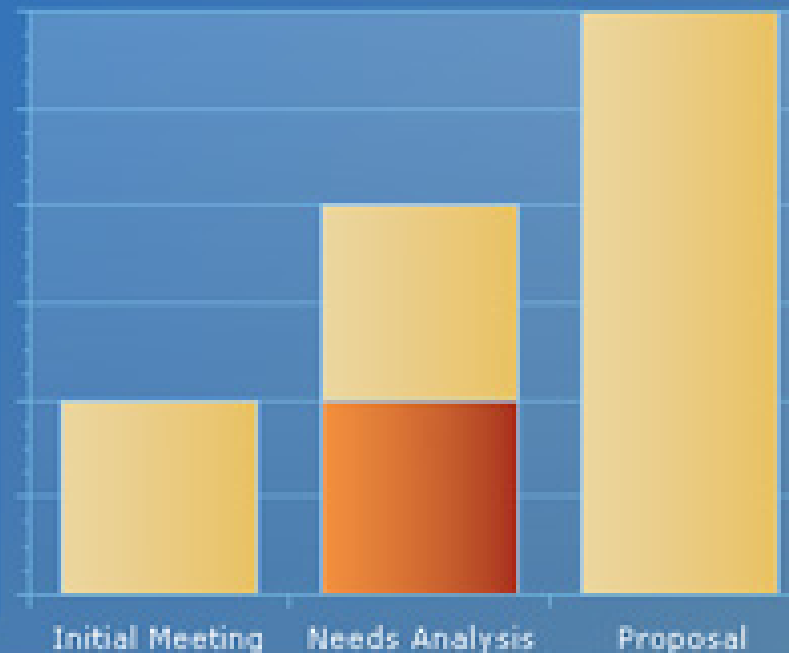
\$176,000

past year (12 total)

Most Recently Created Opportunities

Southridge Electrical Distributors	\$30,000.00	Browning, Adam a few moments ago
Back to Basics Offgrid	\$5,000.00	Browning, Adam 4 hours ago
Offgrid Ag Solutions	\$6,000.00	Browning, Adam 4 hours ago
Brightspark Supplies	\$5,000.00	Browning, Adam 4 hours ago
Northland Alternative	\$25,000.00	Browning, Adam 4 hours ago

Adam's Opportunities by Stage



[← Show Last Chart](#)

What are you working on?

Wind & Wave Electronics Ltd



Phone: 828-330-1912

Mobile: 828-330-2012

Email: jared@wind-wave-ltd.comWebsite: wind-wave-ltd.com

Stage: Proposal

Status: In Progress

Scale: Warm

Owner: White, Garry

Physical Address

[view map](#)

4683 Hannah Street
Charlotte
NC
28202
USA

Opportunity Details

Amount:
\$50,000.00

Estimated Amount Low:[Edit](#)[Cancel](#)[Clone](#)[Delete](#)[Won](#)[Lost](#)

Initial Meeting

Needs Analysis

Proposal

Negotiation

Add a Note

Add a Note to this Opportunity

[Save](#)Adam Browning uploaded a file: [Wind and Wave Proposal](#).

Oct 30, 2016



Adam Browning left a note.

[Edit](#) Oct 30, 2016

Well done Gerry & Team. What did you set as the project start date?



Garry White left a note.

[Edit](#) Oct 30, 2016

Met with Jared and the proposal was well received. Buying signal was strong and we closed the deal.

[Contacts](#)

Me, Jan
Primary C

[Appointments](#)

Meet with Jan
Oct 28, 2016

[Tasks](#)

Prepare prop
Oct 26, 2016
Completed

[Messages](#)

thanks for the call
Oct 30, 2016 12:11
support@simplex.com

To add an email to
abrowning+2088@simplex.com

[Files](#)

Wind and Wi