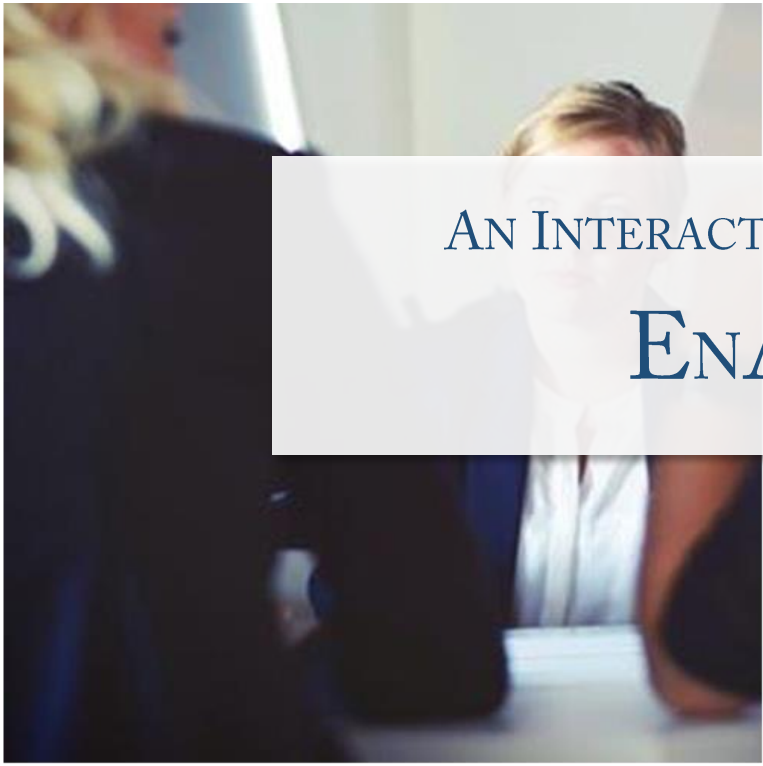
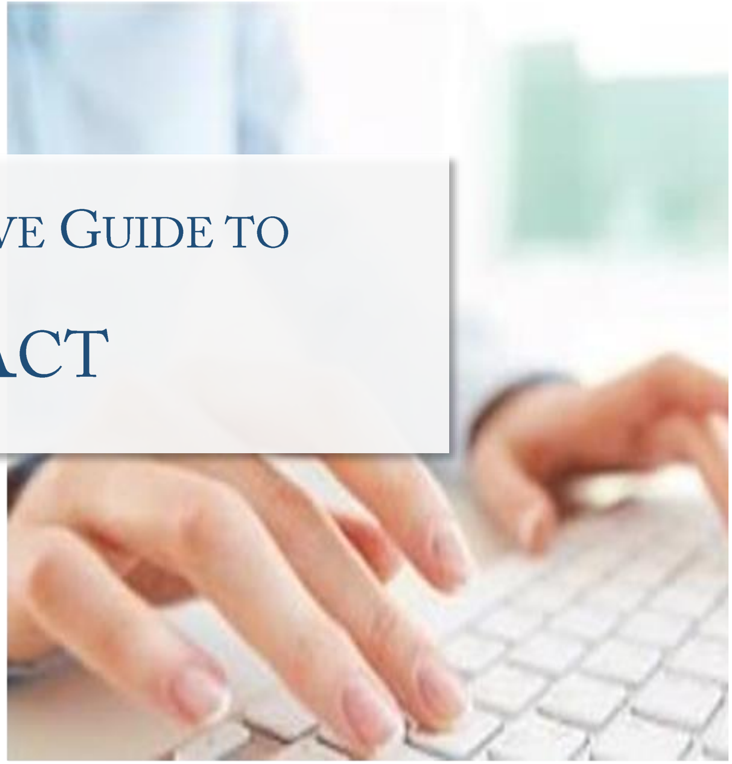
An Interactive Guide to

EnAct





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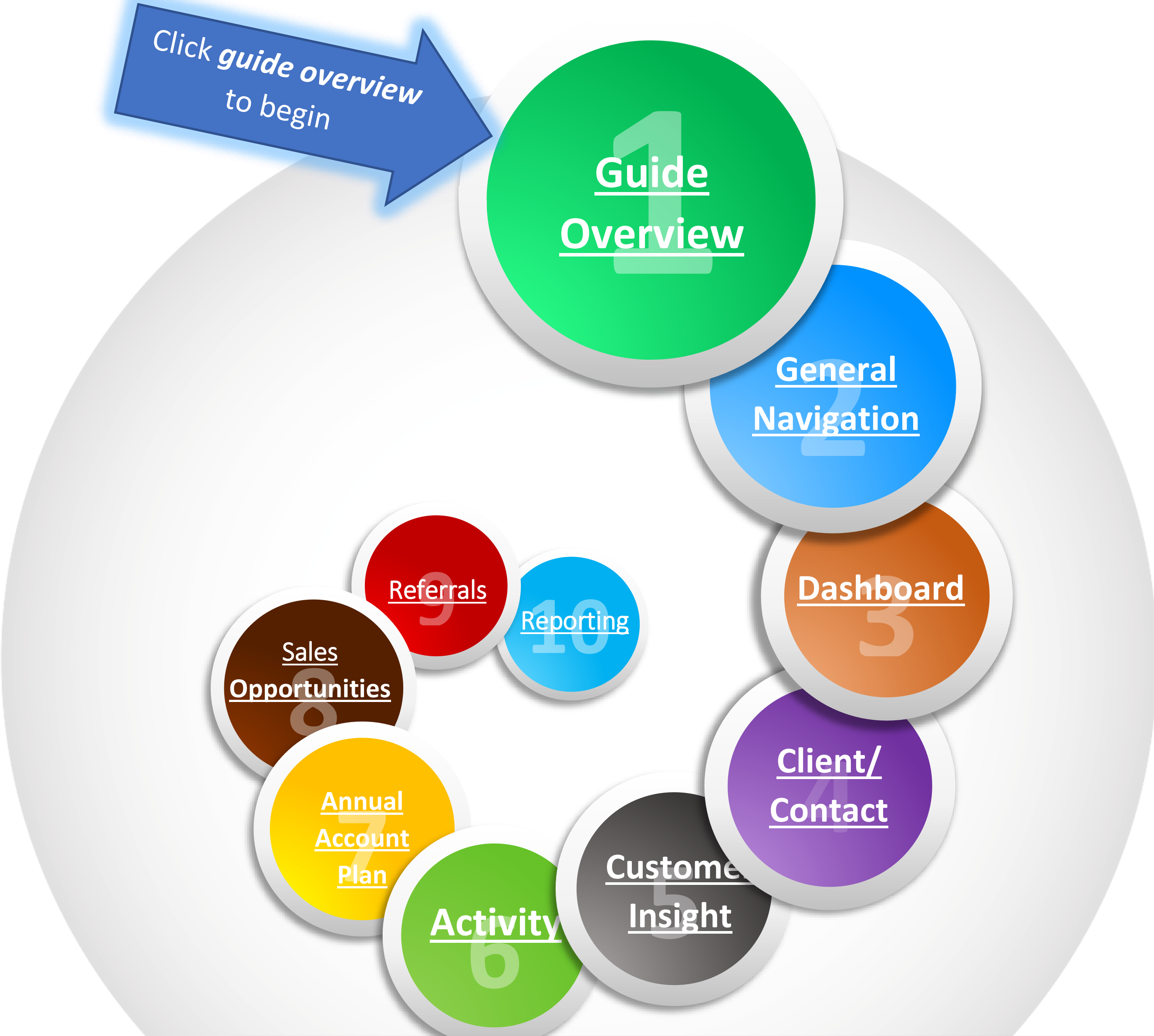

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1. GUIDE OVERVIEW

This guide is designed to be **interactive and engaging** and will provide you with information in a way that helps you get the most working knowledge in the **least amount of time**.

Let's take a look at what some of **your resources** in this guide.

Audio: Click this icon for a **short message** about the **page's category** and how it will **help you** and make **your role easier**.

Video: Whenever you see this icon you will be able to **watch a short, 2 minute instructional video** on how to perform the task. Simply click the icon to be directed to the video. After pressing play, the video ***may* take up to a minute to load** if there is high traffic and low bandwidth in your area.

Instructions: Click this icon for **step-by-step job aid** on how to complete the given task. Each step will be broken down with visuals and clear direction.

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2. GENERAL NAVIGATION

Navigating through EnAct is **simple** and **intuitive**. There are sections broken out on your toolbar that allow you to easily navigate to the area you need to work within. **My Work** is your reporting and tracking home for Dashboard, Goals, and reports. The **Customers section** is where you'll find items such as Client and Contact records and where you enter Referrals. **The Sales area** is where you can access and enter Sales Opportunities. The **Marketing section** hosts marketing campaign information.

Click for more information

Finding EnAct in Outlook

Setting up Client and Contact Folders

Finding EnAct in Outlook

Setting up Client and Contact Folders

3. DASHBOARD

The Dashboard allows you to **view up to date information** on all of your Sales Opportunities, Referrals, and Activities right **from one screen**. Reviewing and managing your Dashboard is important because this is where you will **see all of the activity** that you will ultimately get credit for. Dashboards roll up data through various reporting lines to show how each team member, division, sales leader, region, and the company are proactively managing customer relationships.

Click for more information

Setting up Your Dashboard

Setting up Your Dashboard

4. Client / Contact

Creating and updating Client/Contact records within EnAct gives you a starting point to build out the customer relationship. Through the Client/Contact record you are able to **create Sales Opportunities**, **Referrals**, and **Activities** that will help you manage and expand your customer relationships.

Contact: Customer or prospect records for individuals.

Client: Business Customer's that have an E.I.N. number

Click for more information

- Creating a Client Record (PDF)
- Creating a Contact Record (PDF)
- Searching Clients and Contacts (PDF)
- Creating a Client Record (video)
- Creating a Contact Record (video)
- Searching Clients and Contacts (video)

5. Customer Insight

The **Customer Insight** is an in-depth **conversation guide** that will help you learn more about your customer, uncover additional needs, make better financial recommendations, and form deeper relationships. By utilizing the Customer Insight within EnAct anyone throughout the company can **update financial information** so we can proactively manage and **further grow relationships**.

Click for more information

Customer Insight

Customer Insight

6. ACTIVITY

Activities are a method of **storing information** from tasks, emails, phone calls, appointments, letters, and any other form of communication from our customers all in one place within EnAct. **Activities create a historical record** of your customer interactions and allows you **to take ownership of the sales conversation**. You will be able to show your manager how you are working the sales conversation through a review of the Activities you are completing for each customer.

Click for more information

Creating an Activity

Updating an Activity

Closing an Activity

Creating an Activity

Updating an Activity

Closing an Activity

7. ANNUAL ACCOUNT PLAN

An **Annual Account Plan** is a **framework of Activities** that will help you manage your customer's relationship in the coming year. Setting up an Annual Account Plan provides you with a **clear direction** of what you plan to accomplish with each customer. Creating Annual Account Plans for your customers will help you grow your relationships and add value to your customers and the company.

Click for more information

Creating an Account Plan

Creating an Account Plan

Use of Your Account Plan

8. SALES OPPORTUNITIES

Entering **deposit and loan Sales Opportunities** into EnAct allows you to **manage your pipeline** from the time you identify a prospect to when you close the deal. Sales Opportunities will **help you keep track of deals** as you work them through the various stages of your pipeline. Proactive and accurate management of Sales Opportunities allows you, your manager, and the company, to gauge and manage our pipeline.

Click for more information

Creating a Sales Opportunity

Finding a Sales Opportunity

Updating a Sales Opportunity

Closing a Sales Opportunity

Creating a Sales Opportunity

Finding a Sales Opportunity

Updating a Sales Opportunity

Closing a Sales Opportunity

9. REFERRALS

Entering Referrals into EnAct allows you to **manage partner opportunities** from the time you identify a need to when you close the deal. Referrals will help you **keep track of partner opportunities** as you work them through the various stages of your pipeline. Proactive and accurate management of Referrals allows you, your manager, and the company, **to gauge and manage our partner activity**.

Click for more information

Creating a Referral

Closing a Referral

Creating a Referral

Closing a Referral

Split Credit Process

Assigning Percentages

Split Credit Process

Assigning Percentages

10. REPORTING

EnAct provides in-depth reporting that **tracks your sales opportunities and referrals** as well as many other categories. Pulling reports and checking for completeness and accuracy is critical to receiving credit for the work you are doing. EnAct reporting **rolls up throughout the corporation** and is **used by management** for various tracking and reporting.

***Reporting is specific to user role**.

Click for more information

Generating a Report

Generating a Report

FFC Manager Pipeline Report

FFC Closed Deal Report

FFC Lost Deal Report