

# American Brokerage Services Agent Affiliate Practice User Manual

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## **Registering an Account**

1. On the ABS Homepage, click 'Agent Login' on the bottom right side of the page
2. On the left side, click the 'Register' button
3. Fill out all fields and click 'Create My Account' at the bottom
4. Once an administrator approves your account, your password will be sent to the email address you provided in the registration form

## **Logging into your new Account:**

1. On the ABS Homepage, click 'Agent Login' on the bottom right side of the page
2. On the right side, fill in your username and password, then click 'Submit'
3. You will be taken to the Welcome page, from which you can navigate to any page you wish to edit

## **Editing your Account:**

1. About us Page
  - 1.1. Changing your photo
  - 1.2. Click on the 'Browse...' button and select a picture
  - 1.3. Pictures must fit the following criteria:
    - 1.3.1. Format (extension): .jpg (not .jpeg or .jpe)
    - 1.3.2. Maximum Size: 100KB
    - 1.3.3. Maximum Dimensions: 500 x500
  - 1.4. Brief Description
    - 1.4.1. Enter text that you want to be viewed in the top banner next to your picture
    - 1.4.2. The maximumlengthofthissectionis600 characters
  - 1.5. Full Description (See Text Editor section below)
  - 1.6. When finished editing, click the 'Save My Profile' button at the bottom. You can go back and edit
2. Contact Page
  - 2.1. Enter the required information in each text box. All fields are required.
  - 2.2. Phone and fax numbers must be typed in one of the following formats
    - 2.2.1. ##### (ex. 2223334444)
    - 2.2.2. (###) ##### (ex. (222) 3334444)
  - 2.3. Do not enter the number 1 at the beginning of your phone or fax number
  - 2.4. Your phone number will appear in the header of each page under your picture.
  - 2.5. It will always be in the format ##### regardless of the format you enter it in
3. Products and Services Page
  - 3.1. Enter text that you want to display under the text 'Products and Services' in the introduction field
  - 3.2. Check the boxes next to items you want to display on this page
  - 3.3. You can add and edit your own products and services by entering a title and description in the 'My Custom Product and Services' section
  - 3.4. Click the 'Save My Product & Services' button when you have finished

4. Manage Left Navigation
  - 4.1. To remove a link from the left navigation bar, uncheck its corresponding checkbox
  - 4.2. To remove an entire menu, uncheck the menu's checkbox
  - 4.3. The first menu that is checked will be expanded by default
  - 4.4. You can add links to a menu (up to 3) by clicking 'Add up to 3 Sub-links'
  - 4.5. Editing a Link
    - 4.5.1. The Menu Text is the link text that appears in the left navigation for this page
    - 4.5.2. Page Content (See Text Editor section below)
    - 4.5.3. Before clicking "Save Details" be sure that you've set "Publish" to Yes (it is set to No by default)
  - 4.6. Once you've finished, click the "Update My Menu Settings" button. You can go back and edit this section at anytime.
5. What's New
  - 5.1. This is your event calendar. Select a date and you can enter event information that will be visible on your What's New page
6. The Home, and Free Guide pages are managed by ABS
7. Using the Text Editor
  - 7.1. Formatting Text
    - 7.1.1. To make text bold or italic, select the text then click the respective button (**B** for bold; **I** for italic) on the editor toolbar
    - 7.1.2. To create an ordered (i.e. numbered) list, click the button with 1, 2, and 3 stacked vertically and a line next to each. You can change the order type (i.e. numbers, letters, Roman numerals) by right clicking on the text in your list and clicking 'Numbered List Properties' then selecting a type from the dropdown list
    - 7.1.3. To create an unordered (i.e. bulleted) list, click the button with three squares stacked vertically and a line next to each. You can change the bullet type (i.e. discs, circles, squares) by right clicking on the text in your list and clicking 'Bulleted List Properties' then selecting a type from the dropdown list.
  - 7.2. Links
    - 7.2.1. Creating/Removing Links
      - 7.2.1.1. To make an image or text linked, select it and click the Insert/Edit Link button (the left globe with a chain link)
      - 7.2.1.2. To edit a link at anytime, select it and either click the Insert/Edit Link button or right-click it and select 'Edit Link'
      - 7.2.1.3. To remove a link, select the text or image and click the Remove link button (the right globe with a broken chain link). You can also remove a link by selecting it, right-clicking on it, and clicking 'Remove Link.'
    - 7.2.2. Link Info Tab
      - 7.2.2.1. If linking to another webpage, make sure the link type is set to URL and the Protocol is set to the same protocol as the linked page's URL (usually http://)
      - 7.2.2.2. Copy and paste the link into the URL box, and make sure to remove the protocol (i.e. http://)
      - 7.2.2.3. If linking to a spot on the page (i.e. an image or a link), set the link type to 'Anchor on the page' and select the ID or Name of the place you want to

link to. NOTE: in order to create this type of link, you must give a link or image on that page an ID or a Name (in the Advanced Tab)

- 7.2.2.4. If linking to an email address, set the link type to 'Email' and fill in the email address you would like the email to be sent to. When a user clicks this link, a new email message will automatically open with the user's default email client. The email will have the email address, subject and message body that you created filled in automatically.
- 7.2.3. Target Tab
  - 7.2.3.1. To change where the link opens, select where you want it to open in the Target dropdown list
  - 7.2.3.2. If you leave the Target as '<not set>' the link will open in the same window by default
  - 7.2.3.3. If making a popup window, check any items you want the pop-up to have and leave any items you do not want the window to have unchecked. The left and top positions describe the position of the top left corner of the popup box on the screen.
- 7.2.4. Advanced Tab
  - 7.2.4.1. If you want another link on this page to jump to this link, set an ID or a Name
  - 7.2.4.2. If you have knowledge of CSS, you can edit the style of the link in the 'Style' textbox. Text that is entered in this box will appear in the link's style attribute exactly as typed. For example, if you enter: color: #009900; the link's style will appear: style="color: #009900;" and the link color will appear green. For more information, visit <http://www.w3schools.com/css/>
- 7.3. Images
  - 7.3.1. To insert an image, click and drag any image from your browser into the editor box
  - 7.3.2. To edit an image, right-click and click 'Image Properties'
  - 7.3.3. Image Info Tab
    - 7.3.3.1. To change the image, change the URL manually, or click 'Browse Server'. Now you can add images to the server by clicking "Browse..." at the bottom of the new window, selecting an image from your computer, and clicking "Upload". Click the image's name in the middle of the screen to change the image to this one.
    - 7.3.3.2. Enter "Alternative Text" for users that have images disabled or have poor eyesight and use a program to read an image's alt. text for them.
    - 7.3.3.3. You can resize the image by entering a new width and/or height (this only makes the image look smaller on the page and does not actually change the image file)
    - 7.3.3.4. You can change the thickness of the image's border (set to 0 to have no border) by entering a number in the "Border" textbox. You can do the same for HSpace and VSpace (these are the space any images or text are pushed away from the image horizontally or vertically).
    - 7.3.3.5. Changing the "Align" dropdown will determine the alignment of the image relative to elements around it
  - 7.3.4. Link Tab

- 7.3.4.1. You can create a link around an image through this tab, see the Links section above
- 7.3.4.2. You have more editing options for linking an image by selecting the image and creating a new link instead of using the Link Tab in the Image Properties dialog box
- 7.3.5. Advanced Tab
  - 7.3.5.1. If you want a link on this page to jump to this image, fill in an ID and make a link to “Anchor on this page” with this image’s ID
  - 7.3.5.2. If you have knowledge of CSS, you can edit the style of the image in the ‘Style’ textbox. Text that is entered in this box will appear in the image’s style attribute exactly as typed. For example, if you enter: bordercolor: #009900; the link’s style will appear: style=“bordercolor: #009900;” and the image’s border color will appear green. For more information, visit <http://www.w3schools.com/css/>

### **Viewing Your Published Site:**

1. On the Product and Services, About Us, or Contact page, click the “View this published page” link at the top
2. Alternatively, you can add your username to the URL  
[http://build.exclusiveconcepts.com/abs/\[add\\_your\\_username\\_here\]](http://build.exclusiveconcepts.com/abs/[add_your_username_here])

### **Accessing Your CRM:**

1. Go to [www.absagents.com](http://www.absagents.com)
2. Click ‘CRM’ at the bottom of the page
3. If you are already signed in, you will go directly to the CRM. If not, enter the username and password that you received after registering in the ABS Agent Affiliate Practice to gain access to your CRM.

### **Importing Client Data:**

Navigate to the CRM by clicking ‘CRM’ at the bottom of your website or the absagents.com home page. If you have not already signed in, you will be prompted to enter your username and password before reaching the CRM.

1. Once you have signed in to the CRM, click ‘Import Client’ from the right hand side of the screen.
2. Click ‘Download Template Format,’ which gives you the template that must be followed to import your existing client data.
3. Click ‘Save’ and select the location in which you would like to save the template.
  - 3.1. Make sure that the excel document is being saved with the ‘.xls’ ending NOT ‘.xlsx’
4. Fill out the excel spreadsheet with your current client data
  - 4.1. The Template is setup to use drop down menus wherever they are used within the CRM
  - 4.2. Specific financial data is not importable at this time
  - 4.3. The following fields are required for a successful import into the CRM
    - 4.3.1. First Name
    - 4.3.2. Email Address

- 4.3.3. Client Date of Birth
- 4.3.4. Self Employed
- 4.3.5. Pre or Post Review Needed
- 4.3.6. Annual Review Needed
- 4.3.7. Rating
- 5. Save the spreadsheet
- 6. Back in the CRM, click 'Browse...' and select the spreadsheet that you completed in step 5
- 7. After selecting the appropriate spreadsheet, click 'Import'
  - 7.1. Once the import is complete a message will appear stating the number of successful records imported.
  - 7.2. To view the clients that are now in your CRM, click 'Client Search'

### **Adding Client Data:**

1. Entering information for a new client
  - 1.1. If you are adding data for a client that is not already in your CRM, click 'Add Client,' and a blank Client Profile Summary will open.
  - 1.2. Fill out Client Profile Summary, and click 'Next' to move to the next page which is Family Information
  - 1.3. At the end of each page, click 'Next' to continue to the next page until all that particular client's information has been completed.
  - 1.4. If you would like to skip pages, rather than go through each and every page, look at the right menu and click the page from the list that you would like to update.
  - 1.5. Each page, except client profile summary, lists the 'Client Name' at the top
2. Navigating to existing client data
  - 2.1. Click 'Client Search' from the right menu of the CRM
  - 2.2. Select the client that you would like to edit. This can be done in two ways
    - 2.2.1. A list of clients appears after clicking the 'Client Search,' behind the name of the client that you would like to update, click 'Edit'
      - 2.2.1.1. If the Client's name you are looking for does not appear on the first page of the list, then in the lower left hand corner click the next page to see the next set of names.
    - 2.2.2. Above the list of names are search fields to enter specific details about the client you are searching for
      - 2.2.2.1. Enter one or more of the details of the client you are searching for and click 'Search'
  - 2.3. After selecting the client who's data needs to be updated, click the page from the right hand menu that needs to be updated
3. Client Profile Summary Page
  - 3.1. The fields on this page cover basic contact information.
  - 3.2. Any fields that are shaded in light blue are calculation fields – these fields reference other pages to provide a summary and data cannot be entered directly into the fields
4. Family Information Page
  - 4.1. This page covers spouse and children info if applicable
5. Life Insurance Page

- 5.1. This page scrolls horizontally
  - 5.1.1. Enter the data in each field moving from left to right.
  - 5.1.2. After the data is entered for the first life insurance policy, click 'Add' to have that insurance information added for that particular client
  - 5.1.3. If there are more insurance policies to enter, continue steps 5.1.1 & 5.1.2 until all life insurance policies have been entered
6. Auto Insurance Page
  - 6.1. This page scrolls horizontally
    - 6.1.1. Enter the data in each field moving from left to right.
    - 6.1.2. After the data is entered for the first auto insurance policy, click 'Add' to have that insurance information added for that particular client
    - 6.1.3. If there are more insurance policies to enter, continue steps 5.1.1 & 5.1.2 until all auto insurance policies have been entered
7. Homeowners Insurance Page
  - 7.1. This page scrolls horizontally
    - 7.1.1. Enter the data in each field moving from left to right.
    - 7.1.2. After the data is entered for the first homeowners insurance policy, click 'Add' to have that insurance information added for that particular client
    - 7.1.3. If there are more insurance policies to enter, continue steps 5.1.1 & 5.1.2 until all homeowners insurance policies have been entered
8. Nonqualified Investments/Savings
  - 8.1. Stocks
    - 8.1.1. Fill out all data fields.
    - 8.1.2. The market value field will calculate
    - 8.1.3. Click 'Add' to save the stock info
    - 8.1.4. Continue the steps above until all NonQualified Stocks have been entered
  - 8.2. Mutual Funds
    - 8.2.1. Fill out all data fields.
    - 8.2.2. The market value field will calculate
    - 8.2.3. Click 'Add' to save the mutual fund info
    - 8.2.4. Continue the steps above until all NonQualified Mutual Funds have been entered
  - 8.3. Bonds
    - 8.3.1. Fill out all data fields.
    - 8.3.2. The market value field will calculate
    - 8.3.3. Click 'Add' to save the bond info
    - 8.3.4. Continue the steps above until all NonQualified Bonds have been entered
  - 8.4. REIT's
    - 8.4.1. Fill out all data fields.
    - 8.4.2. The market value field will calculate
    - 8.4.3. Click 'Add' to save the REITs info
    - 8.4.4. Continue the steps above until all NonQualified REIT's have been entered
  - 8.5. ETF's
    - 8.5.1. Fill out all data fields.
    - 8.5.2. The market value field will calculate

- 8.5.3. Click 'Add' to save the ETF info
- 8.5.4. Continue the steps above until all NonQualified ETF's have been entered
- 8.6. Variable Annuities
  - 8.6.1. Fill out all data fields.
  - 8.6.2. The market value field will calculate
  - 8.6.3. Click 'Add' to save the Variable Annuity info
  - 8.6.4. Continue the steps above until all NonQualified Variable Annuities have been entered
- 8.7. CD's
  - 8.7.1. Fill out all data fields.
  - 8.7.2. The market value field will calculate
  - 8.7.3. Click 'Add' to save the CD info
  - 8.7.4. Continue the steps above until all NonQualified CD's have been entered
- 8.8. Money Market
  - 8.8.1. Fill out all data fields.
  - 8.8.2. The market value field will calculate
  - 8.8.3. Click 'Add' to save the money market info
  - 8.8.4. Continue the steps above until all NonQualified Money Markets have been entered
- 8.9. Annuities
  - 8.9.1. Fill out all data fields.
  - 8.9.2. The market value field will calculate
  - 8.9.3. Click 'Add' to save the annuities info
  - 8.9.4. Continue the steps above until all NonQualified Annuities have been entered
- 8.10. Treasuries
  - 8.10.1. Fill out all data fields.
  - 8.10.2. The market value field will calculate
  - 8.10.3. Click 'Add' to save the treasuries info
  - 8.10.4. Continue the steps above until all NonQualified treasuries have been entered
- 8.11. Cash Equivalents
  - 8.11.1. Fill out all data fields.
  - 8.11.2. The market value field will calculate
  - 8.11.3. Click 'Add' to save the cash equivalents info
  - 8.11.4. Continue the steps above until all NonQualified cash equivalents have been entered
- 9. Qualified Investments
  - 9.1. 401-k
    - 9.1.1. Within this category you can enter stock info, annuity info and bank info.
    - 9.1.2. Enter whatever data applies and click add at the end of each line of data
    - 9.1.3. Any fields that are shaded blue are calculated automatically
  - 9.2. 403-b
    - 9.2.1. Within this category you can enter stock info, annuity info and bank info.
    - 9.2.2. Enter whatever data applies and click add at the end of each line of data
    - 9.2.3. Any fields that are shaded blue are calculated automatically
  - 9.3. 501-c
    - 9.3.1. Within this category you can enter stock info, annuity info and bank info.
    - 9.3.2. Enter whatever data applies and click add at the end of each line of data

- 9.3.3. Any fields that are shaded blue are calculated automatically
- 9.4. 457
  - 9.4.1. Within this category you can enter stock info, annuity info and bank info.
  - 9.4.2. Enter whatever data applies and click add at the end of each line of data
  - 9.4.3. Any fields that are shaded blue are calculated automatically
- 9.5. IRA
  - 9.5.1. Within this category you can enter stock info, annuity info and bank info.
  - 9.5.2. Enter whatever data applies and click add at the end of each line of data
  - 9.5.3. Any fields that are shaded blue are calculated automatically
- 9.6. Other
  - 9.6.1. Fill out all data fields.
  - 9.6.2. Click 'Add' to save the info
  - 9.6.3. Continue the steps above until all Qualified other investments have been entered
- 10. Roth Investments/Savings
  - 10.1. Stocks
    - 10.1.1. Fill out all data fields.
    - 10.1.2. The market value field will calculate
    - 10.1.3. Click 'Add' to save the stock info
    - 10.1.4. Continue the steps above until all Roth Stocks have been entered
  - 10.2. Mutual Funds
    - 10.2.1. Fill out all data fields.
    - 10.2.2. The market value field will calculate
    - 10.2.3. Click 'Add' to save the mutual fund info
    - 10.2.4. Continue the steps above until all Roth Mutual Funds have been entered
  - 10.3. Bonds
    - 10.3.1. Fill out all data fields.
    - 10.3.2. The market value field will calculate
    - 10.3.3. Click 'Add' to save the bond info
    - 10.3.4. Continue the steps above until all Roth Bonds have been entered
  - 10.4. REIT's
    - 10.4.1. Fill out all data fields.
    - 10.4.2. The market value field will calculate
    - 10.4.3. Click 'Add' to save the REITs info
    - 10.4.4. Continue the steps above until all Roth REIT's have been entered
  - 10.5. ETF's
    - 10.5.1. Fill out all data fields.
    - 10.5.2. The market value field will calculate
    - 10.5.3. Click 'Add' to save the ETF info
    - 10.5.4. Continue the steps above until all Roth ETF's have been entered
  - 10.6. Variable Annuities
    - 10.6.1. Fill out all data fields.
    - 10.6.2. The market value field will calculate
    - 10.6.3. Click 'Add' to save the Variable Annuity info
    - 10.6.4. Continue the steps above until all Roth Variable Annuities have been entered

- 10.7. CD's
  - 10.7.1. Fill out all data fields.
  - 10.7.2. The market value field will calculate
  - 10.7.3. Click 'Add' to save the CD info
  - 10.7.4. Continue the steps above until all Roth CD's have been entered
- 10.8. Money Market
  - 10.8.1. Fill out all data fields.
  - 10.8.2. The market value field will calculate
  - 10.8.3. Click 'Add' to save the money market info
  - 10.8.4. Continue the steps above until all Roth Money Markets have been entered
- 10.9. Annuities
  - 10.9.1. Fill out all data fields.
  - 10.9.2. The market value field will calculate
  - 10.9.3. Click 'Add' to save the annuities info
  - 10.9.4. Continue the steps above until all Roth Annuities have been entered
- 10.10. Treasuries
  - 10.10.1. Fill out all data fields.
  - 10.10.2. The market value field will calculate
  - 10.10.3. Click 'Add' to save the treasuries info
  - 10.10.4. Continue the steps above until all Roth Treasuries have been entered
- 10.11. Cash Equivalents
  - 10.11.1. Fill out all data fields.
  - 10.11.2. The market value field will calculate
  - 10.11.3. Click 'Add' to save the cash equivalents info
  - 10.11.4. Continue the steps above until all Roth Cash Equivalents have been entered
- 11. Home/Mortgage
  - 11.1. Current Mortgage
    - 11.1.1. Enter the data into the fields from left to right then click 'Add'
    - 11.1.2. Repeat the step above if there are multiple homes
  - 11.2. Vacation
    - 11.2.1. Enter the data into the fields from left to right then click 'Add'
    - 11.2.2. Repeat the step above if there are multiple vacation homes
- 12. Planning Concerns
  - 12.1. Enter the information for that particular client's planning concerns in the areas outlined on the page.
- 13. Maturity Savings/Investments/Annuity
  - 13.1. CD
    - 13.1.1. Enter the data that applies and click 'Add'
    - 13.1.2. Repeat the step above if there are multiple CD's
  - 13.2. Annuity
    - 13.2.1. Enter the data that applies and click 'Add'
    - 13.2.2. Repeat the step above if there are multiple annuities
  - 13.3. Other
    - 13.3.1. Enter the data that applies and click 'Add'

13.3.2. Repeat the step above if needed

### **Understanding the Dashboard:**

1. The dashboard is available to look at client assets based on different categories. It uses a pie chart to show the breakdown of assets in the following categories:
  - 1.1. High Risk Assets
  - 1.2. Cash Equivalents
  - 1.3. Low Risk Assets
  - 1.4. Bonds
  - 1.5. Assets by Tax Qualification
  - 1.6. Total Assets
2. Click 'Dashboard'
3. Use the search feature at the top of the screen to select the customer's dashboard that you would like to look at
4. Click the client to bring up the dashboard
5. Under Retirement Analysis, click the different tabs to see the pie chart for that particular analysis
6. There is a Dashboard Comment section below the pie chart
  - 6.1. The comment section records all the categories of the pie charts and give the dollar amount and percentage of that section compared to the investments
  - 6.2. There is a question regarding whether there is interest in repositioning assets
  - 6.3. The comments boxes are simply there to type text. The box is setup so that you can keep adding text. After changing, updating or adding text, you must click 'Save' for each box updated

### **How to use the Marketing Wizard:**

1. Go to your CRM
2. Click the 'Marketing Wizard' Tab that is across the top
3. Select the Query that you would like to run on the client data that is in your CRM
4. Enter any other information that the query requires, then click 'Submit'
  - 4.1. If there are no clients that fit the query that has been run, a message will appear stating 'There does not exist any Client for selected Criteria'
  - 4.2. Any clients that fit the query that was run will appear
5. Table of clients and marketing actions
  - 5.1. All clients who fit the query appear in a table
  - 5.2. The table displays client name, address and provides check boxes to selected the marketing action to take (email, letter or phone call)
  - 5.3. The checkbox in the heading has the 'select all' functionality – so clicking the checkbox at the very top will select that marketing action for everyone in the list.
6. You can select more than one marketing actions for each client in the list
7. Selecting templates
  - 7.1. Email template selection
    - 7.1.1. Click 'Select Email Template' that is located at the bottom left under the table with the client names
    - 7.1.2. Viewing the templates available
      - 7.1.2.1. Click the template name to view the template in a larger format to read the



4.2. Click 'Contacts'

4.3. Click 'Edit' to the right of the contact which you would like to update information

### **Calendar:**

1. Click 'Calendar'
2. The calendar defaults to 'Table View,' click 'Calendar View' to view the current month's calendar.
3. 'Table View' vs. 'Calendar View'
  - 3.1. Table View
    - 3.1.1. Table View displays any appointments/events in the form of a table
    - 3.1.2. The table displays the date, title and detail as columns.
    - 3.1.3. This view also allows for marking things as completed and deleting events from the calendar
  - 3.2. Calendar View
    - 3.2.1. The 'Calendar View' shows an overview of the month with the calendar events appearing on the actual day they are scheduled
    - 3.2.2. This view is where adding calendar events takes place
    - 3.2.3. At the top of the calendar month, there are link to go to the 'Previous' or the 'Next' calendar month to review the history and schedule in the future
4. Adding a Calendar event
  - 4.1. Click the '+' symbol on the day in which you would like to add a calendar event or task
  - 4.2. A window showing the date, title and detail will appear
  - 4.3. The 'Title' field is what displays on the calendar after the event is saved. Fill out the title and the description.
  - 4.4. Click 'Save,' the event has been added and is displaying again in 'Table View'
5. Marking events as completed
  - 5.1. Go to the 'Table View' of the calendar
  - 5.2. Use the left check boxes to select the events that you have completed
  - 5.3. At this time the 'completed' button is not functional, but all check boxes selected will stay marked when you navigate away from the page.
6. Deleting calendar events
  - 6.1. Go to the 'Table View' of the calendar
  - 6.2. The check boxes to the right of the calendar events are to select the events to delete
  - 6.3. To select all of the events to delete
    - 6.3.1. Click the 'checkbox' at the very top right of the table view screen
  - 6.4. Select the events by checking the boxes next to the events that you would like to delete
  - 6.5. Once all events to delete are selected
    - 6.5.1. Click 'Delete' at the bottom right of the table view screen
    - 6.5.2. A message will pop up asking if you are sure that you want to delete the selected records.
    - 6.5.3. Click 'OK'

### **Notes:**

1. The notes section allows you to document any information you need to specific to each client
  - 1.1. There are two ways to access the notes section to add notes

- 1.1.1. Click 'Add Notes' – that is located on the bottom right hand side of the screen under the section that says 'Notes'
  - 1.1.1.1. Select the client name who's notes you would like to update from the drop down list
  - 1.1.1.2. Type whatever text you would like to add in the white box
  - 1.1.1.3. Click 'Add' and the text in the white box, will
- 1.1.2. The other way to add notes is at the bottom of any of the pages of the client data.
- 1.2. Each saved note is time and date stamped so that you know what the update was made.

### **ABS Affiliate Newsletter**

1. When you join the ABS Affiliate practice one of the great benefits of becoming an affiliate is the monthly newsletter. The newsletter is sent out to every affiliate's Online CRM clients as well as anyone who signs up on through your affiliate website.
  - 1.1. Click Here to view a sample newsletter.

### **Frequently Asked Questions (FAQ's):**

- ▶ What if I have a data mining request I would like to run that is not available in the marketing wizard on the CRM?

*If there is a data mining request that you would like to see available in the Marketing Wizard of the CRM, please submit the details of your request to: [agentsupport@absagents.com](mailto:agentsupport@absagents.com). After submission the request will be evaluated for future inclusion.*

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- ▶ Can I upload my own templates to the marketing wizard?

*At this time, you are not able to upload your own templates to the marketing wizard. If you would like to use a letter or email that is not currently posted, you are welcome to submit a copy of the letter or email template to: [agentsupport@absagents.com](mailto:agentsupport@absagents.com). All letter and emails on the marketing wizard can be viewed and used by all users.*

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- ▶ Are the marketing wizard templates specific to each user on the CRM, or do all members see the same templates?

*With the current setup, every member of the ABS Affiliate Agent Practice sees the same templates. As mentioned in the previous question, you are able to submit new templates; however other users on the CRM will also be able to use the templates.*

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- ▶ Can I have my existing URL point to my new ABS Affiliate Agent website?

*In most cases, yes you may point your existing URL to your newly created ABS Affiliate Agent website. To make this change, you must contact the company that you have your domain name registered with and ask to have it redirected. We do offer a service to help with the URL redirection. If you would like assistance with URL redirection please send an email to: [info@absagents.com](mailto:info@absagents.com)*

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- ▶ Is there a fee to have help direct my existing URL to my new ABS Affiliate Agent website?

*We can assist with getting your existing URL to point to your new ABS Affiliate Agent website URL. There is a \$50 setup fee for this service. If you would like assistance with URL redirection please send an email to: [info@absagents.com](mailto:info@absagents.com)*

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- ▶ Can I get my own @absagents.com email address?

*Yes, we can offer you your own email address [you@absagents.com](mailto:you@absagents.com). The cost of an email address is \$20 for the first year and \$10/year for each year after. If you would like to setup an @absagents.com email address please email: [info@absagents.com](mailto:info@absagents.com).*

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- ▶ I can't open the letter that the marketing wizard created for me to print and mail, what should I do?

*The letters that are generated to print from the Marketing Wizard are in a PDF format. This is a common format, but if you are having trouble opening the letters to print try visiting this site to download or update your Adobe Acrobat Reader: <http://get.adobe.com/reader/>.*

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- ▶ Why did my client import fail?

*Please also reference the section of the manual dedicated to the specific instructions for completing a client import. A client import could fail for the following reasons:*

*-- > All required fields in the template were not filled out*

*---The required fields are: first name, email address, Client DOB, Self Employed, Pre/Post Review Needed, Annual Review and Rating*

*-- >The excel document is in the wrong format. In order for a successful import the excel document must end in '.xls'*

*-- >The name of the worksheet must remain named: 'ClientData'*

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- ▶ Can I import Outlook contacts to the business contact section of my CRM?

*This feature is not yet available in the CRM. We are continuing to enhance the website's features and are anticipating this feature being added in subsequent updates.*

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- ▶ How can I submit my ideas for enhancements to the ABS Affiliate Agent Practice?

*Please send your support request via email to: [agentsupport@absagents.com](mailto:agentsupport@absagents.com).*

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- ▶ Who can I contact for support with the ABS Affiliate Agent Practice?

*Please send your support request via email to: [agentsupport@absagents.com](mailto:agentsupport@absagents.com).*

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- ▶ My ABS Affiliate Agent website URL is too long, can this be shortened?

*There is no way to shorten your ABS Affiliate Agent URL; however, you may purchase a domain name of your choosing from any vendor that sells domain names. The domain name that you purchase can then be redirected to your ABS Affiliate website. (See other FAQ's for detail on how to redirect)*

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- ▶ What is the ABS Affiliate Newsletter?

*The ABS Affiliate Newsletter is part of the Affiliate Practice. The Newsletter is designed to put you the agent in front of your clients, by providing invaluable resources to your clients on topics of concern.*

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- ▶ Who receives the ABS Affiliate Newsletter?

*The ABS Affiliate Newsletter is sent out to all clients in your Online CRM as well as anyone who signs up to receive the newsletter on your personalized website.*

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- ▶ I have story ideas that I would like to see in the newsletter, how can I submit my ideas?

*Please submit any suggestions regarding the newsletter to:  
[agentsupport@absagents.com](mailto:agentsupport@absagents.com).*

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