



Global (Keyword) Search

Dashboard

Product Catalog

Document Repository

Email (3)

Accounts

Prospects

Leads

Opportunities

Activities

Org Chart

Work Flow

Contacts

Calendar

Reports

Activities

Search Accounts

New Activity

Delete Activity

Account Prospect ▼	Title ▼	Description ▼	Priority ▼	Start Date ▼	Due Date ▼	Status ▼	Notes
Deloitte Consulting ID 1244323254345766	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam sit amet eros nisl. Praesent fringilla sodales ...	High	10.12.2010	10.22.2010	In Progress <div><div></div><div></div><div></div><div></div><div></div></div>	+
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Activity :: Lorem ipsum dolor sit amet, consectetur adipiscing elit.

In Progress

Print

Customer Information

Deloitte Consulting

1234 Main Street
Chicago, IL 60601
U.S.A.
www.deloitte.com

Contact

Jennifer Horton
312-555-2012
jhorton@deloitte.com

Social Media

FB | TW | LI

Activity Details

Activity Title

Activity ID

Transaction Type

Start Date

Due Date

End Date

Status

Importance

Category

Territory

Activity Description | Notes

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SOCIAL MEDIA

Search Social Media

Feeds

Search Results /
Selected Feed



Monday 10.11.2010 at 2:45pm
Laura Jones via Facebook (icon)

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Monday 10.11.2010 at 12:11am
Kristina Rupert via Twitter (icon)

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Friday 10.08.2010 at 1:22pm
Jenny Campbell via LinkedIn (icon)

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Social Media Options

Phone Book PHONE ▼

Address Book CHAT ▼

TODAY'S ACTIVITIES

Options

NOTES: Dashboard - Leads

In order to view a note, user will simply select one of the records from the list. A new note blank area will appear in the same "view note" area if the New Note button is selected

BRANDING



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New Activity Delete Activity

Account Prospect ▼	Title ▼	Description ▼	Priority ▼	Start Date ▼	Due Date ▼	Status ▼	Notes
Deloitte Consulting ID 1244323254345766	Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam sit amet eros nisl. Praesent fringilla sodales ...	High	10.12.2010	10.22.2010	In Progress ■■■●●●	+
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Activity :: Lorem ipsum dolor sit amet, consectetur adipiscing elit.

In Progress ■■■●●●

Print

Customer Information

Select Customer

Deloitte Consulting ▼

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U.S.A.
www.deloitte.com

Contact

Jennifer Horton
312-555-2012
jhorton@deloitte.com

Social Media

FB | TW | LI

Activity Details

Activity Title

Activity ID

Transaction Type

▼

Start Date

Day 31

Due Date

Day 31

End Date

Day 31

Status

▼

Importance

▼

Category

Territory

Activity Description | Notes

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SOCIAL MEDIA

Search Social Media

Feeds

Search Results /
Selected Feed



Monday 10.11.2010 at 2:45pm

Laura Jones via Facebook (icon)

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Kristina Rupert via Twitter (icon)

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Jenny Campbell via LinkedIn (icon)

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Social Media Options

Phone Book

PHONE

Address Book

CHAT

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Office Max ID 76345676576356711	Praesent feugiat orci quis dui posuere a facilisis dolor dignissim.	Quisque rhoncus nunc id est scelerisque eleifend.	Medium	09.12.2010	09.14.2010	Pending <div><div></div><div></div><div></div><div></div><div></div></div>	+

New Activity

In Progress

Print

Customer Information

Select Customer

Customer details will auto populate here once a customer has been selected. If a new customer needs to be created, the user will be taken to the Prospect/Account tab, then will come back here to finish the Activity creation process. "New" will be one of the drop-down options.

Activity Details

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Activity ID

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Due Date

End Date

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Territory

Activity Description | Notes

New note...



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