



Global (Keyword) Search

Dashboard

Product Catalog

Document Repository

Email (3)

Accounts

Prospects

Leads

Opportunities

Activities

Org Chart

Work Flow

Contacts

Calendar

Reports

## Prospects

New Prospect Import Prospects

Prospect	Description	Address	Contact	Value	Source	Phase	Notes
Deloitte Consulting	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam sit amet eros nisl. Praesent fringilla sodales ...	1234 Main Street Chicago, IL 60601 U.S.A.	Jennifer Horton Email   Call	\$214,000	Source	In Progress	
New York Times	Aliquam sit amet eros nisl. Praesent fringilla sodales nisl at tempus.	3434 Finley St. New York, NY 12001 U.S.A.	Gabriela Stewart Do Not Call   Email   Call	\$120,090	Source	In Progress	
Office Max	Quisque rhoncus nunc id est scelerisque eleifend.	11 N. Michigan Chicago, IL 60601 U.S.A.	Victoria Welden Do Not Call	\$30,000	Source	In Progress	

## Deloitte Consulting :: 360° Prospect View

Overview	General Info	Activities	Notes	Products	History	Attachments
Current Opportunities	New Opportunity	LEADS	OPPORTUNITIES - NO OVERVIEW			
Title	Value	Quality	Stage	Date Created	Due Date	Notes   Description
Electronics for Deloitte	\$66,000	Hot	Presenting	10.22.2010	10.31.2010	
Services request for New York Times	\$120,090	Warm	Presenting	10.22.2010	10.31.2010	
Services request for Optoma	\$212,000	Warm	Presenting	10.22.2010	10.31.2010	

### Opportunity Contact Information

<div><div>Deloitte Consulting</div><div>Prospect <u>Convert to Account</u></div><div>1234 Main Street</div><div>Chicago, IL 60601</div><div>U.S.A.</div><div>www.deloitte.com</div></div> <div><div>Contact</div><div>Jennifer Horton</div><div>312-555-2012</div><div>jhorton@deloitte.com</div></div> <div><div>Social Media</div><div>FB   TW   LI</div></div>		Title ▼	Stage ▼	Priority ▼	Due Date ▼	Notes   Description
		Title	Stage...	Priority	10.22.2010	<div><div></div><div>+</div></div>
		Title	Stage...	Priority	10.22.2010	<div><div></div><div>+</div></div>
		Title	Stage...	Priority	10.22.2010	<div><div></div><div>+</div></div>
		Title	Stage...	Priority	10.22.2010	<div><div></div><div>+</div></div>
		Title	Stage...	Priority	10.22.2010	<div><div></div><div>+</div></div>
		Title	Stage...	Priority	10.22.2010	<div><div></div><div>+</div></div>

## SOCIAL MEDIA

Search Social Media

Feeds

Search Results/  
Selected Feed

Monday 10.11.2010 at 2:45pm  
**Laura Jones via Facebook** (icon)  
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Duis dignissim velit ac enim lacinia blandit. Pellentesque eu nisl metus. Sed cursus risus eget tellus sagittis vitae laoreet dolor rhoncus.

Monday 10.11.2010 at 12:11am  
**Kristina Rupert via Twitter** (icon)  
Ut malesuada commodo sem, eget laoreet quam placerat ultrices. Nullam gravida sollicitudin ligula, id commodo orci laoreet pharetra.

Friday 10.08.2010 at 1:22pm  
**Jenny Campbell via LinkedIn** (icon)  
Cras commodo iaculis dictum. In hac... Neque porro quisquam est qui dolorem ipsum quia dolor sit amet, consectetur,

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

Global (Keyword) Search 

Dashboard

Product Catalog

Document  
Repository 

Email (3)

## Prospects

Search Prospects 

New Prospect

Import Prospects

Assign

Prospect	Description	Address	Contact	Value	Source	Phase	Notes
Deloitte Consulting	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam sit amet eros nisl. Praesent fringilla sodales...	1234 Main Street Chicago, IL 60601 U.S.A.	Jennifer Horton <a href="#">Email</a>   <a href="#">Call</a>	\$214,000	Source	In Progress	
<a href="#">Promote to Account</a>   <a href="#">Edit</a>							
New York Times	Aliquam sit amet eros nisl. Praesent fringilla sodales nisl at tempus.	3434 Finley St. New York, NY 12001 U.S.A.	Gabriela Stewart Do Not Call <a href="#">Email</a>   <a href="#">Call</a>	\$120,090	Source	In Progress	
<a href="#">Promote to Account</a>   <a href="#">Edit</a>							
Office Max	Quisque rhoncus nunc id est scelerisque eleifend.	11 N. Michigan Chicago, IL 60601 U.S.A.	Victoria Welden Do Not Call	\$30,000	Source	In Progress	
<a href="#">Promote to Account</a>   <a href="#">Edit</a>							

## Deloitte Consulting :: 360° Prospect View

Overview

General Info

Activities

Notes

Products

History

Attachments

Account Information

**Deloitte Consulting**  
**Prospect [Convert to Account](#)**  
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



Sales Data

Total Orders	19
Average Order Cost	\$22,000
Gross Margin	62.66

Options

## 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)

Ut malesuada commodo sem, eget laoreet quam placerat ultrices. Nullam gravida sollicitudin ligula, id commodo orci laoreet pharetra.



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





Global (Keyword) Search

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## Prospects

New Prospect Import Prospects Assign

Prospect	Description	Address	Contact	Value	Source	Phase	Notes
Deloitte Consulting	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam sit amet eros nisl. Praesent fringilla sodales ...	1234 Main Street Chicago, IL 60601 U.S.A.	Jennifer Horton Email   Call	\$214,000	Source	In Progress	
New York Times	Aliquam sit amet eros nisl. Praesent fringilla sodales nisl at tempus.	3434 Finley St. New York, NY 12001 U.S.A.	Gabriela Stewart Do Not Call Email   Call	\$120,090	Source	In Progress	
Office Max	Quisque rhoncus nunc id est scelerisque eleifend.	11 N. Michigan Chicago, IL 60601 U.S.A.	Victoria Welden Do Not Call	\$30,000	Source	In Progress	

## Deloitte Consulting :: 360° Prospect View

Overview General Info **Activities** Notes Products History Attachments

### Account Activities

Title   Description	Status	Priority	Due Date
Nunc convallis tristique arcu placerat auctor. Maecenas id leo est. Ut tortor ligula, laoreet sed rhoncus sed...	Fir...	High	10.22.2010
Maecenas tempor quam at enim bibendum volutpat. Proin accumsan lacus lectus. Mauris ac mi quis risus...	Fir...	Medium	10.24.2010
Sed odio justo, cursus vel tempor eu, viverra a lorem.	Sec...	Medium	10.24.2010
Maecenas tempor quam at enim bibendum volutpat. Proin accumsan lacus lectus. Mauris ac mi quis risus...	Fir...	Medium	10.24.2010

### Activity Title

☒ Owner  
  
Status  
  
Start Date  
  
Due Date  
  
Stage  
  
Priority

### Activity Description | Notes

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam sit amet eros nisl. Praesent fringilla sodales nisl at tempus. Vestibulum interdum volutpat massa, nec egestas turpis fermentum a. Etiam egestas fringilla feugiat. Duis vestibulum venenatis urna a molestie. Quisque rhoncus nunc id est scelerisque eleifend. Suspendisse potenti. Nulla vestibulum, sem quis fringilla mattis, lorem dolor tempus magna, id condimentum metus leo pulvinar leo. Sed libero ipsum, mollis id tincidunt quis, iaculis sit amet est.

Save Cancel

## SOCIAL MEDIA

Search Social Media

Feeds Search Results / Selected Feed

Monday 10.11.2010 at 2:45pm  
**Laura Jones via Facebook** (icon)  
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Duis dignissim velit ac enim lacinia blandit. Pellentesque eu nisl metus. Sed cursus risus eget tellus sagittis vitae laoreet dolor rhoncus.

Monday 10.11.2010 at 12:11am  
**Kristina Rupert via Twitter** (icon)  
Ut malesuada commodo sem, eget laoreet quam placerat ultrices. Nullam gravida sollicitudin ligula, id commodo orci laoreet pharetra.

Friday 10.08.2010 at 1:22pm  
**Jenny Campbell via LinkedIn** (icon)  
Cras commodo iaculis dictum. In hac... Neque porro quisquam est qui dolorem ipsum quia dolor sit amet, consectetur,

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



Global (Keyword) Search

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## Prospects

Search Prospects

New Prospect Import Prospects Assign

Prospect	Description	Address	Contact	Value	Source	Phase	Notes
Deloitte Consulting	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam sit amet eros nisl. Praesent fringilla sodales ...	1234 Main Street Chicago, IL 60601 U.S.A.	Jennifer Horton <a href="#">Email</a>   <a href="#">Call</a>	\$214,000	Source	In Progress	+
New York Times	Aliquam sit amet eros nisl. Praesent fringilla sodales nisl at tempus.	3434 Finley St. New York, NY 12001 U.S.A.	Gabriela Stewart Do Not Call <a href="#">Email</a>   <a href="#">Call</a>	\$120,090	Source	In Progress	+
Office Max	Quisque rhoncus nunc id est scelerisque eleifend.	11 N. Michigan Chicago, IL 60601 U.S.A.	Victoria Welden Do Not Call	\$30,000	Source	In Progress	+

### Deloitte Consulting :: 360° Prospect View

Overview General Info Activities **Notes** Products History Attachments

Current Notes	New Note
<div>Note ▼</div> <div>Nunc convallis tristique arcu placerat auctor. Maecenas id leo est. Ut tortor ligula, laoreet sed rhoncus sed...</div> <div>Maecenas tempor quam at enim bibendum volutpat. Proin accumsan lacus lectus. Mauris ac mi quis risus scelerisque...</div> <div>Sed odio justo, cursus vel tempor eu, viverra a lorem. Nunc vel...</div>	<div>Creted On ▼</div> <div>10.22.2010</div> <div>10.24.2010</div> <div>10.24.2010</div>

New Note

Vestibulum a nisl sapien, sit amet varius odio. Aliquam mattis, quam in ornare congue, nibh enim congue ante, vel placerat lacus nunc in nulla. Etiam varius enim sit amet nisl malesuada vel laoreet ligula mollis. Donec aliquet elementum diam, ac convallis nulla luctus quis. Ut elementum est in felis sollicitudin ut ultricies nulla fringilla. Integer et arcu urna. Donec in diam non urna faucibus fermentum non eget felis. Maecenas ultricies, lectus et convallis dignissim, nulla erat pulvinar erat, ac mattis neque velit at augue. Etiam mauris massa, fermentum sit amet mollis vel, fringilla a elit. Proin ligula turpis, sagittis in cursus nec, gravida ut tortor. Fusce sapien quam, scelerisque eget viverra ac, luctus sit amet purus. Donec consequat, diam quis sollicitudin volutpat...

Save

Cancel

## SOCIAL MEDIA

Search Social Media

Feeds Search Results / Selected Feed

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

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Duis dignissim velit ac enim lacinia blandit. Pellentesque eu nisl metus. Sed cursus risus eget tellus sagittis vitae laoreet dolor rhoncus.

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**Kristina Rupert via Twitter** (icon)

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**Jenny Campbell via LinkedIn** (icon)

Cras commodo iaculis dictum. In hac... Neque porro quisquam est qui dolorem ipsum quia dolor sit amet, consectetur,

Social Media Options

Phone Book PHONE ▼

Address Book CHAT ▼

## TODAY'S ACTIVITIES

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New Prospect

Import Prospects

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Prospect	Description	Address	Contact	Value	Source	Phase	Notes
Deloitte Consulting	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam sit amet eros nisl. Praesent fringilla sodales ...	1234 Main Street Chicago, IL 60601 U.S.A.	Jennifer Horton <a href="#">Email</a>   <a href="#">Call</a>	\$214,000	Source	In Progress	
<a href="#">Promote to Account</a>   <a href="#">Edit</a>							
New York Times	Aliquam sit amet eros nisl. Praesent fringilla sodales nisl at tempus.	3434 Finley St. New York, NY 12001 U.S.A.	Gabriela Stewart Do Not Call <a href="#">Email</a>   <a href="#">Call</a>	\$120,090	Source	In Progress	
<a href="#">Promote to Account</a>   <a href="#">Edit</a>							
Office Max	Quisque rhoncus nunc id est scelerisque eleifend.	11 N. Michigan Chicago, IL 60601 U.S.A.	Victoria Welden Do Not Call	\$30,000	Source	In Progress	
<a href="#">Promote to Account</a>   <a href="#">Edit</a>							

## Deloitte Consulting :: 360° Prospect View

Overview General Info Activities Notes **Products** History Attachments

New Order

Products of Interest

	<b>Product Name</b> Product Number: XYZ1234512101	<a href="#">Product Details</a>	Qty	x	\$199.01	<a href="#">Add to Cart</a>	
	<b>Product Name</b> Product Number: XYZ1234512101	<a href="#">Product Details</a>	Qty	x	\$12.99	<a href="#">Add to Cart</a>	
	<b>Product Name</b> Product Number: XYZ1234512101	<a href="#">Product Details</a>	Qty	x	\$55.99	<a href="#">Add to Cart</a>	
	<b>Product Name</b> Product Number: XYZ1234512101	<a href="#">Product Details</a>	Qty	x	\$44.99	<a href="#">Add to Cart</a>	
	<b>Product Name</b>						

Total items: 22  
Tax: \$562.22  
Promotional Code: 2344325BVD  
Total: \$7,522.99 [Check Out](#)

## SOCIAL MEDIA

Search Social Media

Feeds

Search Results/  
Selected Feed

Monday 10.11.2010 at 2:45pm  
**Laura Jones via Facebook** (icon)  
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Duis dignissim velit ac enim lacinia blandit. Pellentesque eu nisl metus. Sed cursus risus eget tellus sagittis vitae laoreet dolor rhoncus.

Monday 10.11.2010 at 12:11am  
**Kristina Rupert via Twitter** (icon)  
Ut malesuada commodo sem, eget laoreet quam placerat ultrices. Nullam gravida sollicitudin ligula, id commodo orci laoreet pharetra.

Friday 10.08.2010 at 1:22pm  
**Jenny Campbell via LinkedIn** (icon)  
Cras commodo iaculis dictum. In hac... Neque porro quisquam est qui dolorem ipsum quia dolor sit amet, consectetur,

Social Media Options

Phone Book **PHONE** ▼

Address Book **CHAT** ▼

## TODAY'S ACTIVITIES

Options

NOTES: Dashboard - Leads

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Global (Keyword) Search

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Prospects

Search Prospects

New Prospect

Import Prospects

Assign

Prospect	Description	Address	Contact	Value	Source	Phase	Notes
Deloitte Consulting	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam sit amet eros nisl. Praesent fringilla sodales ...	1234 Main Street Chicago, IL 60601 U.S.A.	Jennifer Horton Email   Call	\$214,000	Source	In Progress	
New York Times	Aliquam sit amet eros nisl. Praesent fringilla sodales nisl at tempus.	3434 Finley St. New York, NY 12001 U.S.A.	Gabriela Stewart Do Not Call   Email   Call	\$120,090	Source	In Progress	
Office Max	Quisque rhoncus nunc id est scelerisque eleifend.	11 N. Michigan Chicago, IL 60601 U.S.A.	Victoria Welden Do Not Call	\$30,000	Source	In Progress	

Deloitte Consulting :: 360° Prospect View

Overview General Info Activities Notes Products History Attachments

Description	Date Created	Date Updated	Partner Involved
Cras magna enim, posuere sed malesuada ac, porttitor in enim. Praesent ac leo eget risus faucibus egestas. Nunc ornare gravida sem non adipiscing.	10.19.2010 2:33pm	10.21.2010 11:13am	Sarah Carter
Donec egestas diam vitae velit consectetur quis aliquam arcu lobortis. Nulla facilisi. Maecenas cursus lobortis mauris, sit amet porta urna lobortis a. Integer ac varius erat.	10.12.2010 4:33pm	10.13.2010 8:52 am	Jamie Stewart
Praesent sit amet nibh neque. Nulla vitae dui enim. Integer nec lacus ut orci congue sagittis vitae sed purus.	09.09.2010 11:19am	10.21.2010 11:13am	Sarah Carter
Proin faucibus ante in sapien hendrerit eleifend. In malesuada, ante tristique pretium	08.30.2010 7:52am	09.10.2010 4:19pm	Sarah Carter

Search Social Media

Feeds

Search Results/  
Selected Feed



Monday 10.11.2010 at 2:45pm

Laura Jones via Facebook (icon)

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Duis dignissim velit ac enim lacinia blandit. Pellentesque eu nisl metus. Sed cursus risus eget tellus sagittis vitae laoreet dolor rhoncus.



Monday 10.11.2010 at 12:11am

Kristina Rupert via Twitter (icon)

Ut malesuada commodo sem, eget laoreet quam placerat ultrices. Nullam gravida sollicitudin ligula, id commodo orci laoreet pharetra.



Friday 10.08.2010 at 1:22pm

Jenny Campbell via LinkedIn (icon)

Cras commodo iaculis dictum. In hac... Neque porro quisquam est qui dolorem ipsum quia dolor sit amet, consectetur,

Social Media Options

Phone Book PHONE

Address Book CHAT

TODAY'S ACTIVITIES

Options

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



Global (Keyword) Search

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Document Repository

Email (3)

- Accounts
- Prospects
- Leads
- Opportunities
- Activities
- Org Chart
- Work Flow
- Contacts
- Calendar
- Reports

### Prospects

New Prospect

Import Prospects

Assign

Prospect	Description	Address	Contact	Value	Source	Phase	Notes
Deloitte Consulting	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam sit amet eros nisl. Praesent fringilla sodales ...	1234 Main Street Chicago, IL 60601 U.S.A.	Jennifer Horton Email   Call	\$214,000	Source	In Progress	
New York Times	Aliquam sit amet eros nisl. Praesent fringilla sodales nisl at tempus.	3434 Finley St. New York, NY 12001 U.S.A.	Gabriela Stewart Do Not Call   Email   Call	\$120,090	Source	In Progress	
Office Max	Quisque rhoncus nunc id est scelerisque eleifend.	11 N. Michigan Chicago, IL 60601 U.S.A.	Victoria Welden Do Not Call	\$30,000	Source	In Progress	

Deloitte Consulting :: 360° Prospect View

Overview

General Info

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File Name	Notes	File Type	Date Created
File 1	Note...	PDF	10.19.2010 2:33pm
File 2	Note...	PDF	09.09.2010 11:19am
File 3	Note...	Video	10.12.2010 4:33pm
File 4	Note...	MS Word	10.19.2010 2:33pm
File 5	Note...	PDF	09.09.2010 11:19am
File 6	Note...	PowerPoint	10.19.2010 2:33pm

### SOCIAL MEDIA

Search Social Media

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Search Results / Selected Feed

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Laura Jones via Facebook (icon)

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Duis dignissim velit ac enim lacinia blandit. Pellentesque eu nisl metus. Sed cursus risus eget tellus sagittis vitae laoreet dolor rhoncus.

Monday 10.11.2010 at 12:11am

Kristina Rupert via Twitter (icon)

Ut malesuada commodo sem, eget laoreet quam placerat ultrices. Nullam gravida sollicitudin ligula, id commodo orci laoreet pharetra.

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Social Media Options

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## Accounts

New Account

Account	Description	Address	Contact	Value	Employee Responsible	Notes
Deloitte Consulting ID 1244323254345766	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam sit amet eros nisl. Praesent fringilla sodales ...	1234 Main Street Chicago, IL 60601 U.S.A. <span>map</span>	Jennifer Horton <span>Email   Call</span>	\$214,000	John Smith	<span>+</span>
New York Times ID 3548654768688954	Aliquam sit amet eros nisl. Praesent fringilla sodales nisl at tempus.	3434 Finley St. New York, NY 12001 U.S.A. <span>map</span>	Gabriela Stewart Do Not Call <span>Email   Call</span>	\$120,090	Barbara Lauren	<span>+</span>
Office Max ID 76345676576356711	Quisque rhoncus nunc id est scelerisque eleifend.	11 N. Michigan Chicago, IL 60601 U.S.A. <span>map</span>	Victoria Welden Do Not Call	\$30,000	Janice Stewart	<span>+</span>

## Deloitte Consulting :: 360° Account View

Overview

General Info

Activities

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Products

History

Attachments

Fact Sheet

Current Opportunities

New Opportunity

## LEADS OPPORTUNITIES - NO OVERVIEW

Title	Value	Quality	Stage	Date Created	Due Date	Notes   Description
Electronics for Deloitte	\$66,000	<div><div></div><div></div><div></div></div> Hot	<div><div></div><div></div><div></div><div></div><div></div></div> Presenting	10.22.2010	10.31.2010	<span>+</span>
Services request for New York Times	\$120,090	<div><div></div><div></div><div></div></div> Warm	<div><div></div><div></div><div></div><div></div><div></div></div> Presenting	10.22.2010	10.31.2010	<span>+</span>
Services request for Optoma	\$212,000	<div><div></div><div></div><div></div></div> Warm	<div><div></div><div></div><div></div><div></div><div></div></div> Presenting	10.22.2010	10.31.2010	<span>+</span>

## Opportunity Contact Information

Opportunity Contact Information		Opportunity Activities				
		Title	Stage	Priority	Due Date	Notes   Description
<b>Deloitte Consulting</b> <b>Prospect Convert to Account</b> 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				
		Title	Stage...	Priority	10.22.2010	<span>+</span>
		Title	Stage...	Priority	10.22.2010	<span>+</span>
		Title	Stage...	Priority	10.22.2010	<span>+</span>
		Title	Stage...	Priority	10.22.2010	<span>+</span>
		Title	Stage...	Priority	10.22.2010	<span>+</span>

## 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



Global (Keyword) Search

Dashboard

Product Catalog

Document  
Repository

Email (3)

## Accounts

Search Accounts

New Account

Account ▼	Description ▼	Address ▼	Contact ▼	Value ▼	Employee Responsible ▼	Notes
<b>Deloitte Consulting</b> ID 1244323254345766	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam sit amet eros nisl. Praesent fringilla sodales ...	1234 Main Street Chicago, IL 60601 U.S.A.	Jennifer Horton <a href="#">Email</a>   <a href="#">Call</a>	\$214,000	John Smith	+
<b>New York Times</b> ID 3548654768688954	Aliquam sit amet eros nisl. Praesent fringilla sodales nisl at tempus.	3434 Finley St. New York, NY 12001 U.S.A.	Gabriela Stewart Do Not Call <a href="#">Email</a>   <a href="#">Call</a>	\$120,090	Barbara Lauren	+
<b>Office Max</b> ID 76345676576356711	Quisque rhoncus nunc id est scelerisque eleifend.	11 N. Michigan Chicago, IL 60601 U.S.A.	Victoria Welden Do Not Call	\$30,000	Janice Stewart	+

## Deloitte Consulting :: 360° Account View

Overview

**General Info**

Activities

Notes

Products

History

Attachments

Fact Sheet

## Account Information

**Deloitte Consulting**  
**Prospect [Convert to Account](#)**  
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

## Total Orders by Type



## Total Orders by Revenue



## Sales Data

**Total Orders**  
19

**Average Order Cost**  
\$22,000

**Gross Margin**  
62.66

## 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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Social Media Options

Phone Book PHONE

Address Book CHAT

## TODAY'S ACTIVITIES

Options

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BRANDING



Global (Keyword) Search

Dashboard

Product Catalog

Document Repository

Email (3)

Accounts

Prospects

Leads

Opportunities

Activities

Org Chart

Work Flow

Contacts

Calendar

Reports

## Accounts

New Account

Account	Description	Address	Contact	Value	Employee Responsible	Notes
Deloitte Consulting ID 1244323254345766	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam sit amet eros nisl. Praesent fringilla sodales ...	1234 Main Street Chicago, IL 60601 U.S.A. <span>map</span>	Jennifer Horton <span>Email   Call</span>	\$214,000	John Smith	<span>+</span>
New York Times ID 3548654768688954	Aliquam sit amet eros nisl. Praesent fringilla sodales nisl at tempus.	3434 Finley St. New York, NY 12001 U.S.A. <span>map</span>	Gabriela Stewart Do Not Call <span>Email   Call</span>	\$120,090	Barbara Lauren	<span>+</span>
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## Deloitte Consulting :: 360° Account View

Overview **General Info** Activities Notes Products History Attachments Fact Sheet

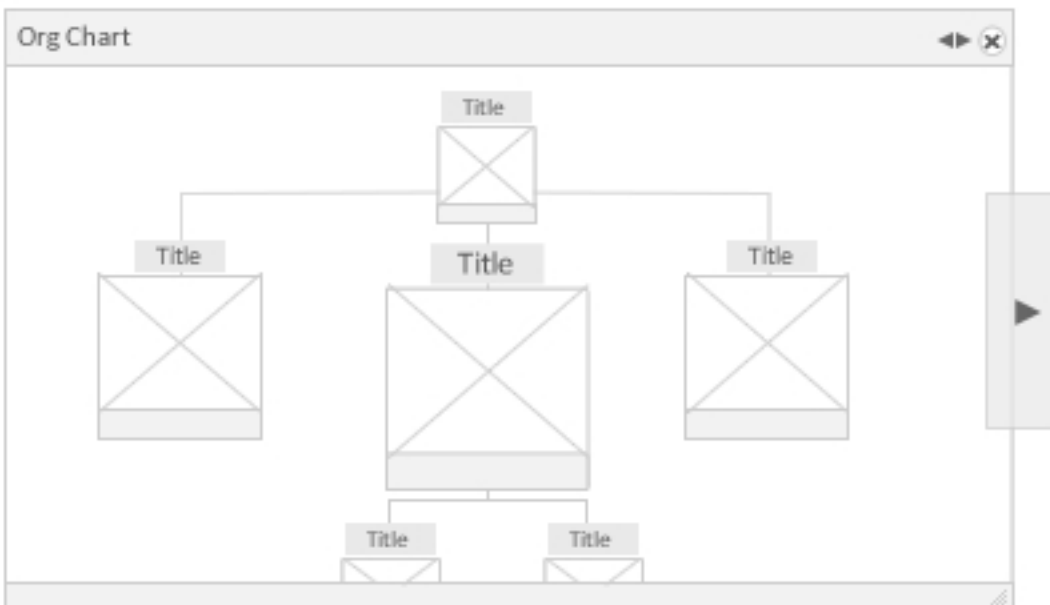


**Sales Data**

Total Orders  
19

Average Order Cost  
\$22,000

Gross Margin  
62.66



## SOCIAL MEDIA

Search Social Media

Feeds

Search Results/  
Selected Feed

Monday 10.11.2010 at 2:45pm  
**Laura Jones via Facebook** (icon)  
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Duis dignissim velit ac enim lacinia blandit. Pellentesque eu nisl metus. Sed cursus risus eget tellus sagittis vitae laoreet dolor rhoncus.

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Social Media Options

Phone Book PHONE

Address Book CHAT

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Global (Keyword) Search

- Dashboard
- Product Catalog
- Document Repository
- Email (3)

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- Calendar
- Reports

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#### Deloitte Consulting :: 360° Account View

Overview

General Info

**Activities**

Notes

Products

History

Attachments

Fact Sheet

Activities = stages - system generated

Account Activities

Title | Description ▼

Status ▼

Priority ▼

Due Date ▼

Nunc convallis tristique arcu placerat auctor. Maecenas id leo est. Ut tortor ligula, laoreet sed rhoncus sed...

Fir...

High

10.22.2010

Maecenas tempor quam at enim bibendum volutpat. Proin accumsan lacus lectus. Mauris ac mi quis risus...

Fir...

Medium

10.24.2010

Sed odio justo, cursus vel tempor eu, viverra a lorem.

Sec...

Medium

10.24.2010

Maecenas tempor quam at enim bibendum volutpat. Proin accumsan lacus lectus. Mauris ac mi quis risus...

Fir...

Medium

10.24.2010

Activity Title

☒

Activity Description | Notes

Owner

Status

Start Date

Day 31

Due Date

Day 31

Stage

Priority

Save

Cancel

### 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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**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

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Global (Keyword) Search

- Dashboard
- Product Catalog
- Document Repository
- Email (3)

- Accounts
- Prospects
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- Calendar
- Reports

### Accounts

New Account

Account ▼	Description ▼	Address ▼	Contact ▼	Value ▼	Employee Responsible ▼	Notes
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<b>New York Times</b> ID 3548654768688954	Aliquam sit amet eros nisl. Praesent fringilla sodales nisl at tempus.	3434 Finley St. New York, NY 12001 U.S.A.	Gabriela Stewart Do Not Call <div>Email   Call</div>	\$120,090	Barbara Lauren	+
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### Deloitte Consulting :: 360° Account View

Overview

General Info

Activities

**Notes**

Products

History

Attachments

Fact Sheet

Current Notes

New Note

Note ▼	Credited On ▼
Nunc convallis tristique arcu placerat auctor. Maecenas id leo est. Ut tortor ligula, laoreet sed rhoncus sed...	10.22.2010
Maecenas tempor quam at enim bibendum volutpat. Proin accumsan lacus lectus. Mauris ac mi quis risus scelerisque...	10.24.2010
Sed odio justo, cursus vel tempor eu, viverra a lorem. Nunc vel...	10.24.2010

New Note

Vestibulum a nisl sapien, sit amet varius odio. Aliquam mattis, quam in ornare congue, nibh enim congue ante, vel placerat lacus nunc in nulla. Etiam varius enim sit amet nisl malesuada vel laoreet ligula mollis. Donec aliquet elementum diam, ac convallis nulla luctus quis. Ut elementum est in felis sollicitudin ut ultricies nulla fringilla. Integer et arcu urna. Donec in diam non urna faucibus fermentum non eget felis. Maecenas ultricies, lectus et convallis dignissim, nulla erat pulvinar erat, ac mattis neque velit at augue. Etiam mauris massa, fermentum sit amet mollis vel, fringilla a elit. Proin ligula turpis, sagittis in cursus nec, gravida ut tortor. Fusce sapien quam, scelerisque eget viverra ac, luctus sit amet purus. Donec consequat, diam quis sollicitudin volutpat...

Save

Cancel

### 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

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BRANDING



Global (Keyword) Search

Dashboard

Product Catalog

Document Repository

Email (3)

Accounts

Prospects

Leads

Opportunities

Activities

Org Chart

Work Flow

Contacts

Calendar

Reports

## Accounts

Search Accounts

New Account

Account	Description	Address	Contact	Value	Employee Responsible	Notes
Deloitte Consulting ID 1244323254345766	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam sit amet eros nisl. Praesent fringilla sodales ...	1234 Main Street Chicago, IL 60601 U.S.A.	Jennifer Horton <a href="#">Email</a>   <a href="#">Call</a>	\$214,000	John Smith	+
New York Times ID 3548654768688954	Aliquam sit amet eros nisl. Praesent fringilla sodales nisl at tempus.	3434 Finley St. New York, NY 12001 U.S.A.	Gabriela Stewart Do Not Call <a href="#">Email</a>   <a href="#">Call</a>	\$120,090	Barbara Lauren	+
Office Max ID 76345676576356711	Quisque rhoncus nunc id est scelerisque eleifend.	11 N. Michigan Chicago, IL 60601 U.S.A.	Victoria Welden Do Not Call	\$30,000	Janice Stewart	+

## Deloitte Consulting :: 360° Account View

Overview General Info Activities Notes Products & Services History Attachments Fact Sheet

Products of Interest

Opportunity

Create a Quote

Place an Order

Previous Orders



Product Name

Product Number: XYZ1234512101

[Product Details](#)

Qty

x \$199.01

[Add to Cart](#)



Product Name

Product Number: XYZ1234512101

[Product Details](#)

Qty

x \$12.99

[Add to Cart](#)



Product Name

Product Number: XYZ1234512101

[Product Details](#)

Qty

x \$55.99

[Add to Cart](#)



Product Name

Product Number: XYZ1234512101

[Product Details](#)

Qty

x \$44.99

[Add to Cart](#)



Product Name

## Pipeline

Marketing Materials  
- Pull in PP  
- Presentations  
- etc  
- Contracts  
- Other, etc.  
- Import  
- All under Attachments  
- Keyword Search  
-

Total items: 22

Tax: \$562.22

Promotional Code: 2344325BVD

Total: \$7,522.99

[Check Out](#)

## 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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[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

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Global (Keyword) Search

- Dashboard
- Product Catalog
- Document Repository
- Email (3)

- Accounts
- Prospects
- Leads
- Opportunities
- Activities
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- Work Flow
- Contacts
- Calendar
- Reports

### Accounts

New Account

Account ▼	Description ▼	Address ▼	Contact ▼	Value ▼	Employee Responsible ▼	Notes
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<b>New York Times</b> ID 3548654768688954	Aliquam sit amet eros nisl. Praesent fringilla sodales nisl at tempus.	3434 Finley St. New York, NY 12001 U.S.A.	Gabriela Stewart Do Not Call <div>Email   Call</div>	\$120,090	Barbara Lauren	+
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### Deloitte Consulting :: 360° Account View

Overview

General Info

Activities

Notes

Products

**History**

Attachments

Fact Sheet

Description	Date Created ▼	Date Updated ▼	Partner Involved ▼
Cras magna enim, posuere sed malesuada ac, porttitor in enim. Praesent ac leo eget risus faucibus egestas. Nunc ornare gravida sem non adipiscing.	10.19.2010 2:33pm	10.21.2010 11:13am	Sarah Carter
Donec egestas diam vitae velit consectetur quis aliquam arcu lobortis. Nulla facilisi. Maecenas cursus lobortis mauris, sit amet porta urna lobortis a. Integer ac varius erat.	10.12.2010 4:33pm	10.13.2010 8:52 am	Jamie Stewart
Praesent sit amet nibh neque. Nulla vitae dui enim. Integer nec lacus ut orci congue sagittis vitae sed purus.	09.09.2010 11:19am	10.21.2010 11:13am	Sarah Carter
Proin faucibus ante in sapien hendrerit eleifend. In malesuada, ante tristique pretium	08.30.2010 7:52am	09.10.2010 4:19pm	Sarah Carter

## 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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Social Media Options

Phone Book

PHONE

Address Book

CHAT

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Options

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BRANDING



Global (Keyword) Search

Dashboard

Product Catalog

Document Repository

Email (3)

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## Deloitte Consulting :: 360° Account View

Overview General Info Activities Notes Products History **Attachments** Fact Sheet

File Name	Notes	File Type ▼	Date Created ▼
File 1	Note...	PDF	10.19.2010 2:33pm
File 2	Note...	PDF	09.09.2010 11:19am
File 3	Note...	Video	10.12.2010 4:33pm
File 4	Note...	MS Word	10.19.2010 2:33pm
File 5	Note...	PDF	09.09.2010 11:19am
File 6	Note...	PowerPoint	10.19.2010 2:33pm

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Search Results/  
Selected Feed



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Address Book CHAT

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BRANDING



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## Deloitte Consulting :: 360° Account View

Overview

General Info

Activities

Notes

Products

History

Attachments

Fact Sheet

Order Guides

Order Tracking

Invoices

Balance Sheet

Cases

### Order Guide List

Name ▼	Created Date ▼	Total ▼	Product Details ▼

### Order Guide for Order Guide Name

Products	Item	Invoice	Last Item	Add-Ons
Product Name ▼	Product ID ▼	Product Price ▼	Product Quantity ▼	Total Price ▼

## 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



Global (Keyword) Search

Dashboard

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Leads

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Reports

## Accounts

Search Accounts

New Account

Account ▼	Description ▼	Address ▼	Contact ▼	Value ▼	Employee Responsible ▼	Notes
Deloitte Consulting ID 1244323254345766	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam sit amet eros nisl. Praesent fringilla sodales ...	1234 Main Street Chicago, IL 60601 U.S.A.	Jennifer Horton <a href="#">Email</a>   <a href="#">Call</a>	\$214,000	John Smith	+
New York Times ID 3548654768688954	Aliquam sit amet eros nisl. Praesent fringilla sodales nisl at tempus.	3434 Finley St. New York, NY 12001 U.S.A.	Gabriela Stewart Do Not Call <a href="#">Email</a>   <a href="#">Call</a>	\$120,090	Barbara Lauren	+
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## Deloitte Consulting :: 360° Account View

Overview

General Info

Activities

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Products

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Attachments

Fact Sheet

Order Guides

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Invoices

Balance Sheet

### Recent Orders

Order Number ▼	Order Date ▼	Order Total ▼	Order Status ▼	Product Details ▼
<a href="#">Track Order</a>   <a href="#">Export to Excel</a>				

### Product Details for Order Number 009900ABC

Item Number ▼	Product Description ▼	Category ▼	Price ▼	Quantity ▼	Total Price ▼

## 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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Invoice Number: 9009934568A

Invoice Total: \$2990.40

Invoice Date: 09.22.2010

Invoice Due Date: 11.22.2010

Invoice Aging: 3 days

Item Number ▼	Product Description ▼	Category ▼	Status ▼	Price ▼	Quantity ▼	Total Price ▼

Invoice Number: 3560548ASD

Invoice Total: \$4500.40

Invoice Date: 06.30.2010

Invoice Due Date: 08.29.2010

Invoice Aging: 14 days

Item Number ▼	Product Description ▼	Category ▼	Price ▼	Quantity ▼	Total Price ▼

Invoice Number: 45234543GHFH

Item Number ▼ Product Description ▼ Category ▼ Price ▼ Quantity ▼ Total Price ▼

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Monday 10.11.2010 at 2:45pm

[Laura Jones via Facebook](#) (icon)

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## Deloitte Consulting :: 360° Account View

Overview General Info Activities Notes Products History Attachments **Fact Sheet**

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Balance Sheet

Total Amount Paid: \$22,090.10    Credit Limit: \$50,000.00  
Total Outstanding Balance: \$2990.40    Credit Limit Used: \$40,000.00 (80%)

Make a Payment

Invoice Number	Clearing Doc Number	Account Number	Status	Due Date	Invoice Total	Amount Paid

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Make a Payment

Payment Method ▼	
CC Number	
Expiration Date	CC Security Code
mm ▼	yyyy ▼
First Name	Last Name
Company Name	
City	State ▼
Zip	
Submit	Cancel

Invoice Number	Clearing Doc N...	Account N...	Status	Due Date	Invoice T...	Amount Paid

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