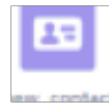




## CREATE NEW CONTACTS

- Open Contacts in Salesforce
- Select "new"
- Enter



1. First Name, Last Name
  - Always check for Company BEFORE choosing "FirstName LastName Company"
  - Check- email signature, Slated.com/manage, imdb, linkedin etc.
3. Email Address
4. Phone
5. Role/Title
6. Overview- quick reference details
7. Also Avail- Website, locations

The screenshot shows the 'Create Contact' form in Salesforce. The 'Name' field is split into 'First Name' (containing 'Leif') and 'Last Name (required)' (containing 'Strand'). The 'Email' field contains 'leif@happycompany.com'. The 'Account Name' dropdown is set to 'Happy Company'. Other fields like 'Department', 'Phone', and 'Email 2' are empty. 'Cancel' and 'Save' buttons are at the bottom right.

The screenshot shows the 'Create Contact' form with more fields filled out. The 'Role' dropdown is set to 'Executive'. The 'Title' field contains 'VP of Development'. The 'Overview' field contains 'Used to be at Sad Company.'. The 'Website' field contains 'www.happycompany.com'. The 'Mobile' field contains '(123) 456-7890'. The 'Contact Owner' is 'Jillian Stein'. The 'Reports To' dropdown is set to 'Select Contact'. The 'Listed Projects' field contains 'Funny Movie, Thoughtful Movie'. The 'Slated Score' field contains '1235'. 'Cancel' and 'Save' buttons are at the bottom right.

# CREATE NEW COMPANIES

- Open Companies in Salesforce
- Select "new"
- Enter



1. Account Name
  - Always check for Company BEFORE choosing "FirstName LastName Company"
  - Check- email signature, Slated.com/ manage, imdb, linkedin etc.
2. Type of Company
3. Investment level
4. Financing Style
5. Investing Trigger
6. Glengarry
7. Email Address
8. Phone
9. Overview- quick reference details
10. Also Avail- Website, locations, role, Genre Preference, Production Stage Preference

The screenshot shows the 'Create Company' form in Salesforce. The 'Account Information' section includes the following fields:

- Account Name\*: Happy Company
- Overview: Invests in Family Sims
- Type: Investor
- Account Owner: Jillian Stein
- Investment Level: Copper (\$100k+)
- Phone: (123) 456-7890
- Investor Type: --None--
- Email: Let@happycompany.com
- Glengarry:
- Investor Status Verified: --None--
- Website:
- Slated ID:

Buttons: Cancel, Save

The screenshot shows the 'Create Company' form in Salesforce, continuing from the previous section. The 'Financing Style' section includes the following options:

- Equity
- Gap
- In-Kind
- Pre-sales

The 'Investing Trigger' section includes the following options:

- Talent is attached

The 'Genre Preference' section includes the following options:

- Any Genre
- Action
- Comedy
- Drama

The 'Production Stage Preference' section includes the following options:

- Packaging
- Pre-Production
- Production
- Post-Production

Buttons: Cancel, Save

# CREATE NEW OPPORTUNITY:

- Open Opportunities in Salesforce
- Select “new”
- Enter
  1. Opportunity Name “EPS \_\_\*: Contact Name/Company Name”

\* Two letter code for project

## 2. Account Name

- Always check for Company BEFORE choosing “FirstName LastName Company”

- Check email signature, Slated.com/manage, imdb, linkedin etc.

3. Closing date
4. Stage of Project
5. Documents sent (if any)

- Shift Click for multiple

6. Amount- estimated value of investment

A screenshot of the Salesforce 'Create Opportunity' form. The form is titled 'Create Opportunity' and is displayed in a browser window. The form fields are as follows: Opportunity Name (EPS LX: Leif Strand/ Happy Company), Opportunity Owner (Jillian Stein), Account Name (Happy Company), Close Date (2/26/2016), Type (--None--), Stage (Legal Documents Sent), Primary Campaign Source (Select Campaign), Documents Sent (Script, PPM, Subscription Questionnaire, Subscription Agreement), Amount (25,000), and Loss Reason. A dropdown menu for the Stage field is open, showing options: --None-- (checked), Target, Engaged, Legal Documents Sent (highlighted), Signed Subscription Agmt, and Closed Lost/Pass. The form has 'Cancel' and 'Save' buttons at the bottom right.

# LOGGING ACTIVITIES

## Call/Meeting (after the fact)

1. In Contact, Company or Opportunities, select "Log a Call"
2. Enter a subject "CALL (or MTG)"
3. Select name of contact(s) on call
4. Select related to Contact, Company or Opportunities
5. Click Save

## Scheduling Call/Meeting

1. In Contact, Company or Opportunities, select "New Event"
2. Enter a subject "CALL (or MTG)"
3. Add description of event
4. Select Start Date and Time & End Date and Time
5. Select name of contact(s) connected to Event
6. Select related to Contact, Company or Opportunities
7. Click Save

The screenshot displays the Salesforce interface for an Opportunity record titled "EPS MV: Leif Strand/Happy Company". The record is owned by Jillian Stein and has an amount of \$25,000.00, with a close date of 2/26/2016. The opportunity is currently in the "Legal Documents..." stage, with previous stages being "Signed Subscripti..." and "Won". The "Mark Stage as Complete" button is visible.

The "Log a Call" form is open, showing the following fields:

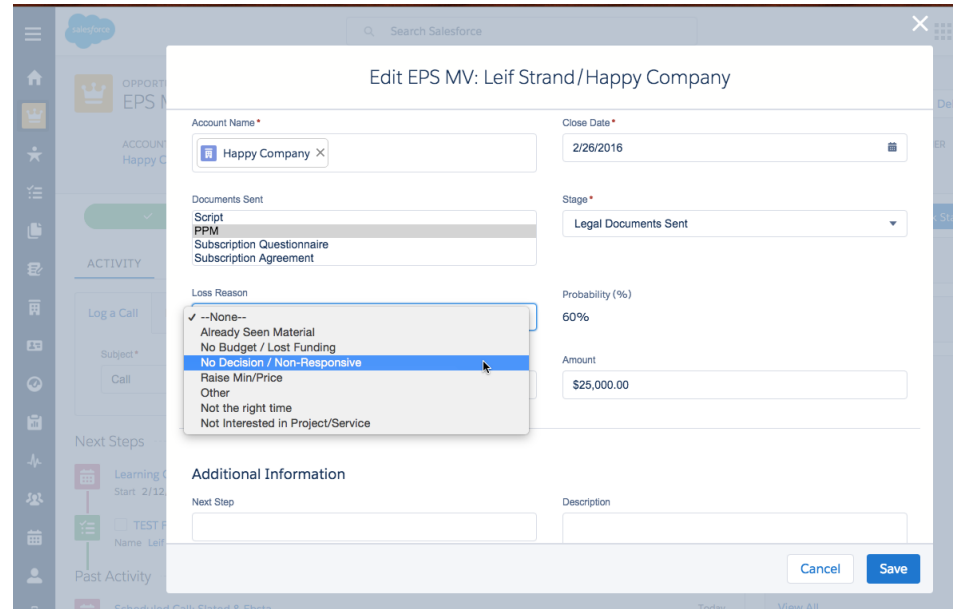
- Subject:** CALL: Leif about PPM
- Description:** check if Leif read PPM
- Start:** Date: 2/11/2016, Time: 12:00 PM
- End:** Date: 2/11/2016, Time: 12:30 PM
- Location:** (Empty field)
- Name:** Leif Strand (Selected)
- Related To:** EPS MV: Leif Strand/Happy Co... (Selected)

The "Save" button is located at the bottom right of the form. On the right side of the interface, there are panels for "Files (0)", "Notes (0)", and "Contact Roles (1)", with the contact role for Leif Strand listed as Executive, VP of Development.

# UPDATING AN OPPORTUNITY



- Enter the name of the Opportunity in the search bar
- Click “Edit”
- Update
  1. Documents sent
  2. Stage
  3. Amount
  4. Loss Reason
  5. Also avail: Next steps, Descriptions
  6. Click Save

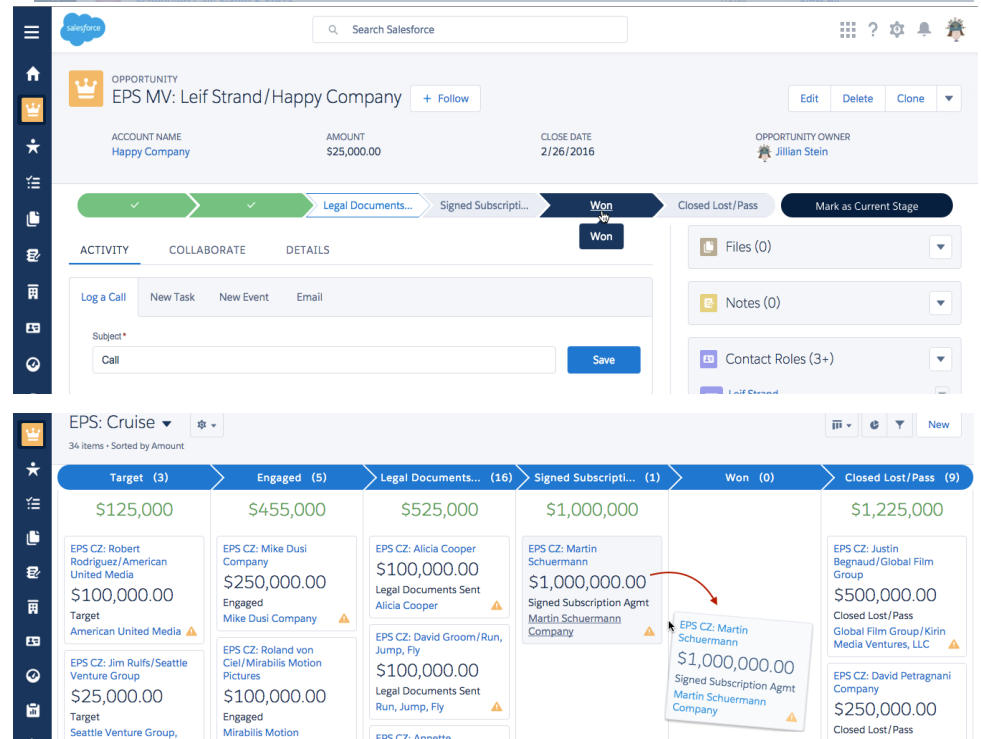


You can also quick update the stage

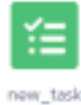
1. Click the appropriate stage on the Pipeline bar
2. Click “Mark Stage Complete”.

Or

Dragging the Card in Board View



# ASSIGNING AN EMAIL WITHIN SALESFORCE



Emails that cannot be connected to an existing record will be listed as "My Unresolved Items" under tasks.

- Open Tasks in Salesforce
- Select the Unresolved Item.
  1. Rename Subject (if applicable)
  2. Enter your name in "Assigned to"
  3. Enter the name of the contact(s) of the email
  4. Enter the related Opportunity name
  5. Scroll down and mark task as complete
  6. Click save

Note: if the contact is connected to a company then the email should show up in both places.

You can use the same steps to create a task for you, or another User, to do.

The screenshot shows the 'Edit Re: Your investor application on Slated' task form in Salesforce. The form is titled 'Edit Re: Your investor application on Slated' and contains the following fields:

- Subject \***: Re: Your investor application on Slated
- Assigned To \***: Jillian Stein
- Due Date**: 9/30/2015
- Name**: Leif Strand
- Related To**: EPS MV: Leif Strand/Happy Co...
- Comments**: Sue Devine, Head of Investors, Slated
- Additional Information**: (Empty)

At the bottom right of the form, there are 'Cancel' and 'Save' buttons. The background shows a list of tasks on the left and a sidebar on the right.

# CHANGE RECORD OR OPPORTUNITY OWNER

1. Open the Contact/Company/Opportunities in Salesforce
2. Select "details"
3. Select "Change owner"
4. Select the new owner
5. Click "Change Owner"

The screenshot shows the Salesforce interface for an Opportunity record. The record name is "EPS CZ: Michel Merkt/KNM" with a value of "+ Follow". The account name is "Michel Merkt Company / KNM", the amount is "\$100,000.00", and the close date is "3/4/2016". The opportunity owner is "Jillian Stein". The record is in the "Closed Lost/Pass" stage. The "DETAILS" tab is selected, showing fields for Opportunity Name, Account Name, Documents Sent, Loss Reason, Stated Score, Opportunity Owner, Close Date, Stage, Probability (%), Amount, Next Step, and Production Status. A red arrow points to the "Change Opportunity O..." link next to the current owner's name.

The screenshot shows the "Change Opportunity Owner" dialog box. It has a title bar with "ert/KNM + Follow" and a close button. The main content area has a text input field labeled "Enter new owner name" and a list of user avatars with names: Jillian Stein, Greg Gertmenian, Jay Burnley, Ryan Beeman, and Stephan Paternot. At the bottom, there are two buttons: "Cancel" and "Change Owner".