

Home Office Pro User Guide

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Home Office Pro Getting Started Guide Members Edition

Welcome to Home Office Pro! Get ready to change the way you do business. Home Office Pro will help you manage your prospects and simplify the membership process. This guide references the default Home Office Pro set up. Your team founder may have additional features or changes to the default set up that will not be represented in this guide.

Legend

 Tip!	This Light Bulb highlights a tip, explanation or Important point about the section you are reading.
 Stop!	This stop sign will appear if there is something important you should make sure you have done or understand before continuing to the next section.

Section I: The Getting Started Check List

The Getting Started Checklist has been provided by your Team Founder as a way to help get you started on your path to success. It shows you the recommended steps you should take as a new member of the team. To view a step, click on the title of the step. To close the step, click on the Home Control Panel link in the Navigation Bar on the left. Follow the instructions provided in the step, and then place a checkmark in the box beside the step to complete it. Completing steps helps you to track your progress.



There is no time limit on completing your tasks. Take as much time as you need to complete the task. The important part is understanding each step and completing them with the confidence to move on to the next step!

You can review a step at any time by clicking on its title. You can also mark a completed step as incomplete by un-checking the box beside it. The Getting Started Checklist will always be available for you to review. Your team founder can also add new steps to your list which will appear as new incomplete tasks.

Section II: Build My Contact List

The Build My Contact List module displays your team website addresses that you can use to obtain contacts. These are the website addresses you would use on internet advertisements, business cards and other marketing avenues. People become contacts in your account by filling out the “Get More Information” form found on your website. When they fill out this form, they will be placed into your Contacts module as a New Prospect. There is also an “Add a Contact” button. This button will allow you to add a contact manually to your account if you have obtained their information from a non online source, such as through a business card.

Section III: Setting Appointments

In your Setting Appointments module, you will find a list of contacts that require a “new action”, such as Call Back or Presentation. All new contacts who have filled out the Get More Information Form on your website but who have not yet been contacted will be listed under the “New Prospects” tab.



If you have purchased leads from an approved provider, or if leads have come to you through your team’s lead rotator, they will also appear under this Tab as a New Prospect. The Origin of the prospect will be shown beside the name. If the contact was manually added, the Origin will be blank.



Figure 1 Setting Appointments



When you are ready to contact your new prospects for the first time, click on the “Contact” button. This will bring up your Outcomes pop-up. In this pop-up window, you tell the system how your call went. Based on the outcome, you choose a list of Recommended Next Actions and a Tip will be displayed. These recommendations and tips are created by the team founder to help guide you as you work with the prospect. Here are some of the possible Recommended Actions that may appear:

Table 1 Possible Recommended Actions

 <p>Send an Instant Follow Up email!</p>	<p>This option will allow you to choose an email to send to the contact immediately. You will be given a list of pre-created follow-up emails to choose from. After you choose an email, your default email program, such as Outlook Express, will open. You will be able to edit the email and then send it to the prospect. If you do not have a default email program set up, here are some websites you can visit for assistance: http://www.mozilla.com/en-US/thunderbird/ www.microsoft.com/outlook/ http://www.eudora.com/</p> <p>Please note that Platinum Synergy Technical Support can not offer assistance in setting up your default mail client.</p>
 <p>Add Prospect to Auto Responder List</p>	<p>This option will allow you to change the Autoresponder list this contact is currently in. By default, all new prospects are placed into the New Prospect list. These autoresponder lists have emails which have been provided by your team founder. The emails will be sent out automatically to the prospect in a defined sequence every few days or weeks, depending on how your founder chose to set them up. These emails can not be changed before they are sent.</p>

 <p>Change the Prospect's Status</p>	<p>Changing the prospect's status is how you move a prospect through the system. When you change the status, the pop up, tips, outcomes and recommended actions will change the next time you work with the contact. It will also change where the contact is stored in your back office. If you change a contact from a New Prospect status to Called, it will remove them from the New Prospects list in the Set Appointments module.</p>
 <p>Schedule a Follow Up Action</p>	<p>If you choose to schedule a follow up appointment, you will be taken to your Home Office Pro calendar after you hit the Complete button. This will allow you to schedule your next appointment.</p>

The Setting Appointments module also has a **lead transfer** function. This function will allow you to give leads to another member in your organization. If you wish to transfer a lead, place a checkmark next to their name, insert the member's website username (for example, www.teamsite.com/username) and click on Transfer.



Please note that the lead transfer is **Non Reversible!** Once you choose to transfer the leads to another person, you are giving up ownership of that lead. The lead will become the property of the member to whom it was transferred. Platinum Synergy can not remove or return leads from a person's account.

Section IV: Working with Contacts






You can work with your contacts in two places: Contacts on the Home Office Navigation menu and in the Setting Appointments module. Contacts are given 2 statuses. One status is set by you (such as New Prospect, New Member, Called Not Interested) and the other status is set by the system, (such as Active, Bounced or Inactive) based on the email campaign list they are part of.

The first status, called a Contact Status, is set or changed by you when you are working with the contact. This can be done from the Contact's detail sheet (found when you click on the Contact's name) or from the Contact pop-up.


When you complete a call or presentation with a contact and are on the Contact Pop-up, you are given the option of changing the contact's status.

The second status is set by the system and is displayed as colored circles next to the contact's name. The statuses are set and are changed according to the Email Sequence (also called an Autoresponder list) that the contact belongs to. There are 5 statuses:

Table 2 Contact Statuses

	<p>Active Active contacts are currently receiving the emails you have in your autoresponder list that this contact belongs to.</p>
	<p>Archived/Inactive Archived contacts were once active contacts, but they have finished receiving the sequenced emails in the autoresponder list they are on. You can still email these contacts and set appointments with them. You can also reactivate them, or move them to a different list to begin receiving a new set of autoresponders.</p>
	<p>Bounced Bounced contacts have invalid email addresses. You can go to the contact's detail sheet to correct their email address. You will be unable to email bounced contacts until a valid email address is entered.</p>
	<p>Pending Pending contacts are required to opt in to receiving your emails before they will become active contacts. A contact may be placed into your account if they have not come from your website or have come from a non-approved lead provider.</p>
	<p>Opt-Outs Opt-Outs are contacts that have chosen to no longer receive your emails. You can not contact this person by email or re-add them to your system as an active contact.</p>

Bonded Contacts

Contact who are Bonded are contacts that have officially agreed to receiving emails from you. These contacts will be sent email through a special server that raises the deliverability of your emails to that contact's ISP. This means that the email is less likely to be placed into the Junk Mail folder by the contact's ISP. If you have a contact who is Bonded, a  will appear next to their Status Icon. To bond an unbonded contact, click on their name to view their details page, then click on the "Send Bonding Request Email" button.

Section V: Appointments

The Appointments module has 2 sections: Scheduled Appointments and Enrollment Score. Under your Appointments, a list of your scheduled activities will be displayed three at a time. When you click on the Complete button beside the appointment, a follow up pop up window will appear. This will allow you to write notes about the appointment you had with the contact as well as take a next action, such as sending a follow up email.

Your Enrollment Score will help you keep track of your New Prospect to Membership progress. It will show you how many Calls and Presentations you are making to New Prospects. It will then give you a percentage of how many of those you have called and presented to have become fully enrolled members to your team. It will give you an average of how many calls to you have to make to obtain an enrolment.



Don't get discouraged if your return ratio is low! These numbers are meant to help guide you. Remember, working with prospects is a learning process. Follow up with your prospects and use the Home Office Pro tools that your founder has provided to help increase your return ratio. Also, be sure to participate in your team's workshops and team conference calls. You **can** do it!

Section VI: Current Co-op Campaigns

The Lead Co-op module is an **optional** upgrade that your team leader can choose to use with Home Office Pro. If you do not have this module in your back office, it means that your team leader has not yet chosen to begin a lead co-op. This module will allow you to purchase shares in a co-op campaign that your founder is running or view the shares you have already purchased. It will show you the price of the share, how many shares you purchased, the name of the co-op and its status. **Active** (green) are campaigns that are currently running, **pending** (orange) are campaigns that have not yet started or have not yet been approved and **fulfilled** (red) are campaigns that have completed.













Purchasing a share in a lead campaign is purchasing a **time slot** on the campaign. The receipt of leads during that time period is not guaranteed. Platinum Synergy does not sell or provide leads to the lead rotator. We are not responsible for the handling of leads or for the payments of the co-op campaign. We **can not** offer technical support for payment issues regarding the campaign or for leads not received.

Section VII: Home Office Navigation Bar

The Home Office Navigation bar is split into two sections. The first section, Home Office, lets you navigate the built in features of Home Office Pro. The second section, Resources, includes the member's area content that your team founder has provided. There is a table for quick reference starting on the next page.

Table 3 Quick Reference to Navigation Buttons under Home Office section




Home Office	
 Home Control Panel	The Home Control Panel button will take you back to the main page of your Home Office Pro account.
 Invite a Member	This button will provide you with an email template to send to refer your team members to Home Office Pro.
 My Contacts	This will take you to your Contacts page, also known as an Address Book. Here, you will find all of your contacts listed for your entire account. You can search for contacts from this page. You can also contact and schedule appointments with contacts here.
 Messenger	In this section you can communicate with other team members who are on line and logged in.
 My Calendar	The Calendar will take you to your main scheduling system page. You can view your calendar, schedule appointments, or complete appointments from this page. You can personalize your calendar by clicking on the preferences sub menu
 Team Calendar	On the Conference Calls page you be able to view all of your team’s scheduled presentations, meetings and conference calls.
 Website Analytics	The Website Analytics provides you with reports on how your website is doing.
 Message Board	The Message Board allows you to communicate with your team. You can post topics, reply to topics, edit your posts, delete your posts, and you can add polls and vote on existing polls. You can also see replies to your posts and how many people have viewed it.

 Report a Problem	<p>If you experience a technical error pop up message while you are using your account, you can use the Report a Problem form to tell us about it. This section is for reporting functionality problems with the website or the member's area. Technical support or billing related questions will not be answered. If you have a support related request a link is provide for you.</p>
 Configuration	<p>The Configuration Page allows you to change settings for your account. You can change the contact information on your website, view and upload your team's sequenced emails and request technical support. This section has six sub-menus.</p> <p>Synchronize My Emails - allows you to match your emails with your founder.</p> <p>Preview My Emails - lets you preview Instant Follow-up Emails, Auto-Responder Emails and emails in your lists.</p> <p>Log Into Response Magic - sends you to the login screen for Response Magic.</p> <p>Tech Support - sends you to a form to fill out to get support. Please make sure you fill out the form correctly to ensure a prompt and precise response.</p> <p>Edit My Website – let's you to edit ONLY your personal information and change or upload your image photo.</p> <p>Email Notification – let's you to check off if you want to be notified when new prospects fill out the form from your site. By default this notification is disabled.</p>



You just need to check of which lists you want synchronized. Then you click on the Download New Emails button. Once you do this it is permanent and cannot be undone. If you have modified your Auto Responders to suit your own needs, it may be in your best interest to exclude those Auto-Responder Lists from the Synchronization process.

Table 4 Quick Reference to Navigation Buttons under Resources section

Resources	
 Training	This section contains four modules to help enhance your skills.
 Business Tools	You will find tools here like Time Management
 Quick Links	The Quick Links button contains links to three critical activities to help you build your business.

Section VIII: Calendar

Your personal Home Office Pro calendar will allow you to set up appointments with contacts and for non contact-related events. It is important that you set up your calendar Preferences.

Initial View: How you would like your calendar to display by default

Default Reminder: How long prior to an appointment you would like an email sent to you.


Business Hours: This will determine what hour time periods are displayed when viewing your calendar in Day View. For example, if you select 9:00am to 5:00pm, only the hours in that time frame will be shown. **If you wish to have a 24 hour calendar, set the hours from 12:00am to 11:00pm.**

Time Zone: This selects your time zone. It is very important for scheduling and reminder purposes that this time zone is correct.

Section IX: Team Conference Call Scheduler

The Team Conference Call Scheduler is set up by your team leader to provide you with a list of days and times of available trainings, meetings, team calls, and presentations. You will not be able to add your own events or calls to this calendar. This calendar is viewable from the Navigation Bar. It is also viewable on the Contact Pop-up, allowing you to quickly reference when the available calls are and schedule an appointment for your contact to attend. To view the Conference Call Schedule from the Contact Pop-up, hit the Conference Calls Tab. See Table 5 on the next page.

Figure 2 Contact Pop Up




Make Notes Here:

CLOSE X

CONTACT
CONFERENCE CALLS

Choose a category: LIVE TRAINING SCHEDULE


Presenter	Date/Time
AMT 7 Steps/Open Q&A	May 8th, 2007 1:00pm
To Be Announced	May 8th, 2007 9:00pm
Appointment Setting Call	May 9th, 2007 2:00pm
Mastering Your Primary Call	May 9th, 2007 8:00pm
AMT 7 Steps/Open Q&A	May 10th, 2007 1:00pm
To Be Announced	May 10th, 2007 3:00pm
Appointment Setting Call	May 10th, 2007 8:00pm
Appointment Setting Call	May 11th, 2007 2:00pm
Saturday Morning Breakfast Call	May 12th, 2007 10:00am



Tiffany Conroy


9182666673

Pacific	Mountain	Central	Eastern	Atlantic
8:02am	9:02am	10:02am	11:02am	12:02pm



Please choose your next actions with this prospect.

Next Actions:




Instant

Send an Instant Follow-up Email:

No Instant Email

v

Send this email through my default mail client.




Automatic

Add Prospect to Autoresponder:

Leave as is...

v




Status

Set Prospect Status To:

Leave as is...

v



Follow-up

Schedule a follow-up call, appointment or webcast?

No Yes

COMPLETE