



Batchbook

Your Social CRM

Batchbook for Beginners

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Set Up and Adding Users

Configure Your Dashboard

Getting Started

Getting Started

We're glad to have you aboard! There are a couple things you'll want to do to customize your new Batchbook account before you get started.

Where in the world are you?

Set Time Zone: (GMT-05:00) Eastern Time (US & Canada) ▼

Your Country: Choose a country... ▼

Default Currency: USD ▼

Date Format: MM/DD/YYYY DD/MM/YYYY

[Save](#)

Customize your Dashboard


You can customize your Dashboard by clicking on the "Customize Dashboard" link on the right and selecting what information you want to display. Move the widgets around by clicking on them then dragging them to their desired location. Please note that certain widgets, such as FreshBooks, Zendesk, and Sales Overview, are only available on paid accounts.

Connect your social media accounts

Keep up to date with your contacts activity on the social web.

[Login with Facebook](#) [Log in with LinkedIn](#) [Sign in with Twitter](#)

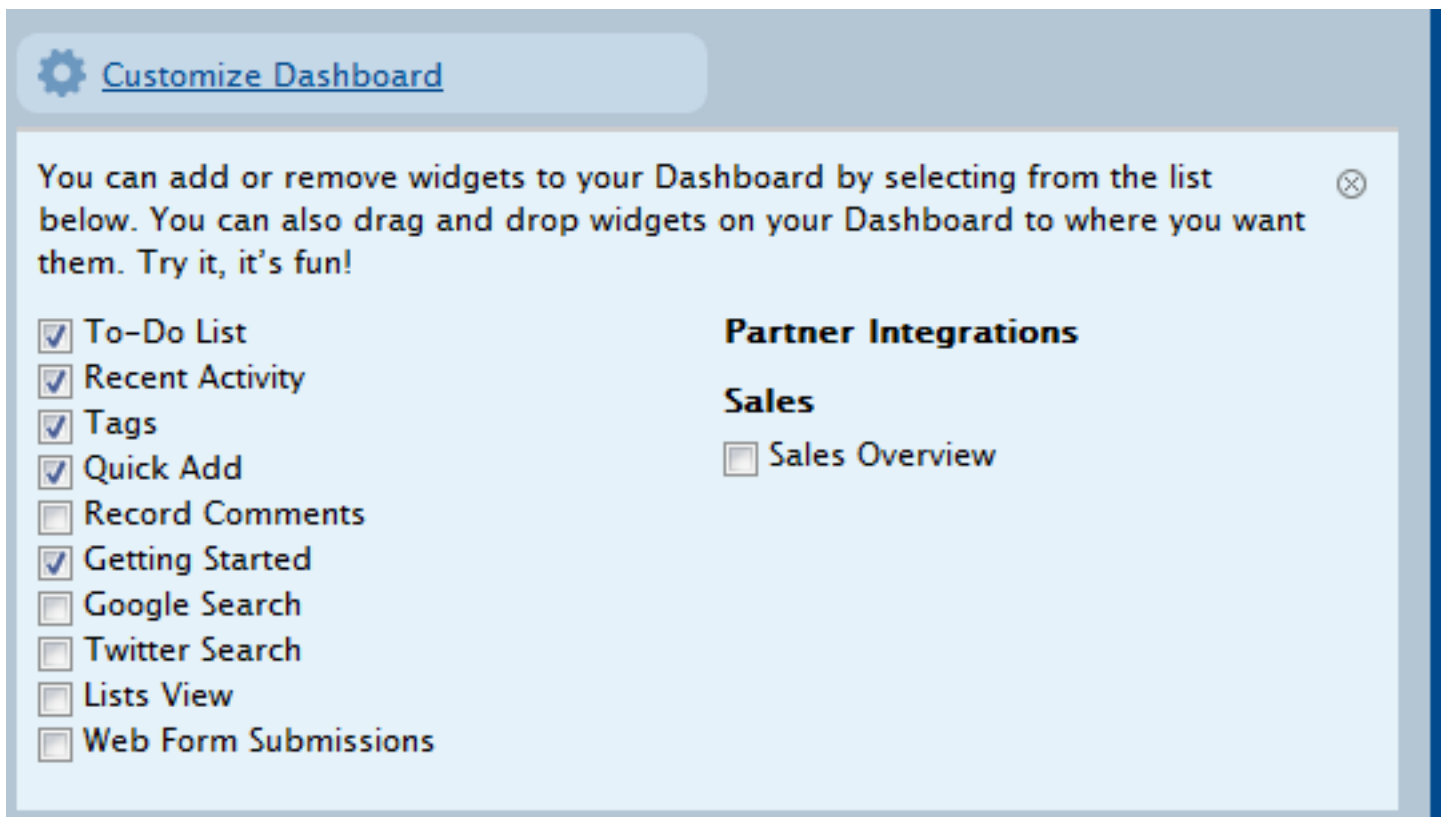
Want help getting started?

 **Customer Onboarding**

All paid accounts are entitled to two free hours with one of our talented Onboarding Specialists. To schedule a session to talk about importing, customization, tagging, etc., write to onboarding@batchblue.com and we'll get it

When you first visit Batchbook, you will open the Dashboard. There, you will be greeted by this Getting Started widget. Here, you can change some settings in Batchbook, learn how to customize your dashboard, connect your social media accounts and get links to more in depth information about using Batchbook.

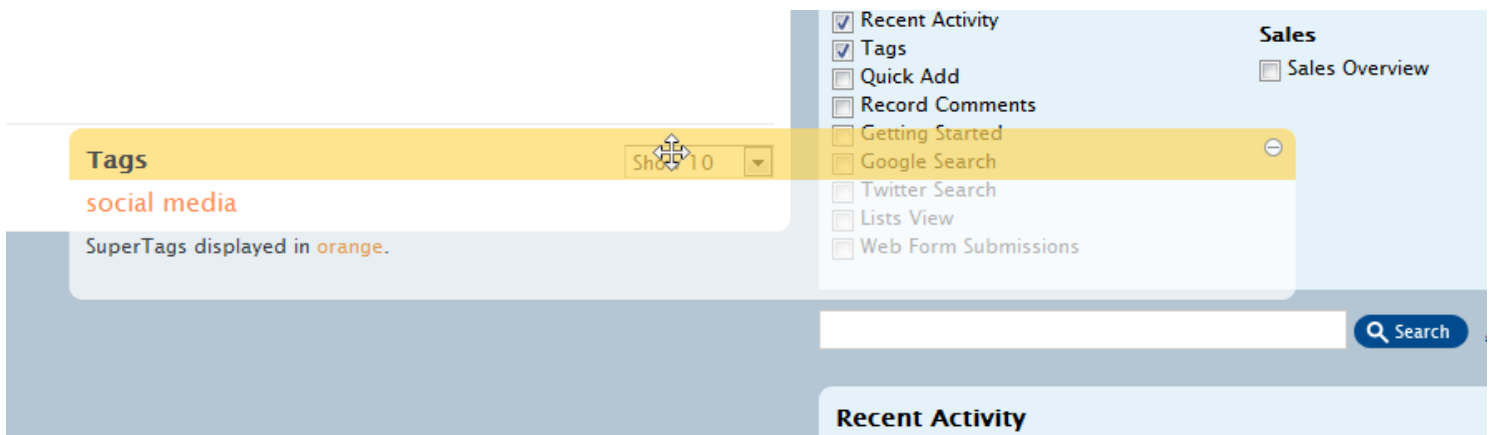
Add and Remove Widgets on Your Dashboard



By clicking on the link to 'Customize Dashboard' you can select which widgets will show up on your dashboard. Uncheck any widgets you do not want to show up. If you have integrations set up, any corresponding widgets will show up as an option here.

Note: The widgets you have access to will depend on your user level.

Drag the Widgets Around



On the Dashboard, you can move your widgets around by clicking and dragging. This lets you put the information that is most important to you right on top!

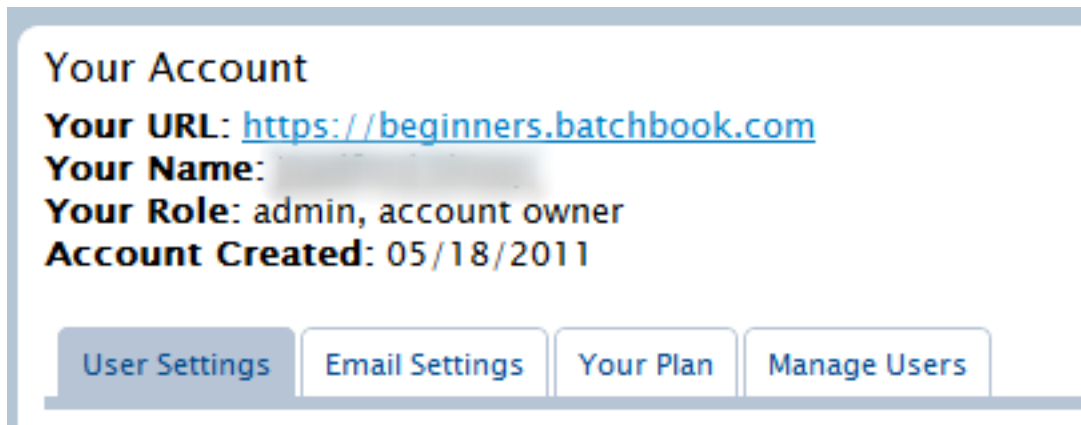
Exploring 'Your Account'

Manage Your Account



Access your account information by clicking the link at the top right.

View your settings in tabs






When you visit 'Your Account', you can see some account settings on all pages. You can view and change specific settings by clicking on the tabs in 'Your Account'.

Note: If you want to log in directly to Batchbook without visiting the BatchBlue website, you can use 'Your URL' to do so.

The right hand menus

Connect Your Social Networks

Authorize Batchbook to connect to your social networks to provide deeper integration with your contacts.

Service	
Facebook	 Login with Facebook
LinkedIn	 Log in with LinkedIn
Twitter	 Sign in with Twitter

Account Stats

Feature	Used
Contacts	3
Storage	Less than 1 percent of storage used.
Users	1
SuperTags	1

Integration

Your Batchbook API Key: **qTrbiwOphQ**

Your Batchbook API Key can be used to share your Batchbook data with third party applications.

[Reset Your API Key](#) | [API Documentation](#)

You can connect your social networks from the 'Your Account' page. This allows you to bring social media information into your contact records and to interact with contacts right from Batchbook.

Here you can also view vital account stats and access your API key (which may be used for some integrations with Batchbook).

Make Changes to Your Credit Card or Your Plan

Your Plan tab

User Settings	Email Settings	Your Plan	Manage Users		
Upgrade/Downgrade Plan		Users	Storage	Contacts	SuperTags
Super Indigo (\$199.95) Select (30 days free)	100	Unlimited	Unlimited	Unlimited	
Indigo Blue (\$149.95) Select (30 days free)	50	Unlimited	Unlimited	Unlimited	
KingFisher Blue (\$69.95) Select (30 days free)	20	25GB	Unlimited	Unlimited	
Royal Blue (\$49.95) Select (30 days free)	10	10GB	Unlimited	Unlimited	
Deep Blue (\$29.95) Select (30 days free)	5	5GB	Unlimited	Unlimited	
Navy Blue (\$14.95) Select (30 days free)	1	2GB	Unlimited	Unlimited	

Change your plan from this page if you need to add more users. You can also change your credit card information from this tab if you are the account owner.










Adding New Users


The Manage Users Tab

Your Account
Your URL: <https://bshimptest.batchbook.com>
Your Name: Brad Shimp
Your Role: admin, account owner
Account Created: 08/18/2010

User Settings | Email Settings | Your Plan | **Manage Users**

Block non-admins from:
 Deleting records and exporting lists? Creating web forms?

Name	Roles	Username (Email)	Action
			
			 
			 
			 
			 

 [Add](#) [Change Account Owner](#)

[What's the difference between an account owner, an admin, an advanced user and a basic user?](#)

Click on 'Your Account' at the top right from any page in Batchbook. From there, you can visit the Manage Users tab.

On this tab, you can add, edit, or remove users, as well as choose some additional permission settings.

Click Add to create a new user

Your Account

Your URL: <https://bshimptest.batchbook.com>

Your Name: Brad Shimp

Your Role: admin, account owner

Account Created: 08/18/2010

User Settings | Email Settings | Your Plan | **Manage Users**

First Name:

Last Name:

Email (login):

Admin:

Advanced User:

Basic User:

Set Time Zone: (GMT-05:00) Eastern Time (US & Canada)

When you add a new user, you can fill in their name and log in email address, pick their user level, and set their time zone.

Once you click Save, your new user will receive an email where they will be instructed on setting up a password for their account.

Users set up their own password

Welcome to BatchBook.

You've been added to a new Batchbook account. Batchbook helps you get organized by managing and tracking your contacts and communications.

Your Batchbook address is: <https://bshimptest.batchbook.com>

Your account has been created with the email address: [REDACTED] You'll need to set a password before you can access your new account.

To set a password, visit here:

[\[REDACTED\]](#)

Get started

Ready to start using Batchbook and experience the Zen-like calm that comes with an organized life? Log on and check out the Dashboard page, which gives tips and tricks to get you going.

Feedback and support

We take your feedback very seriously. Feel free to send us your thoughts on your experience with Batchbook to feedback@batchblue.com. Have questions or need help? Write to support@batchblue.com.

Have fun!

The BatchBlue Staff

Organize your business. Live your life.

BatchBlue blog: <http://blog.batchblue.com/>

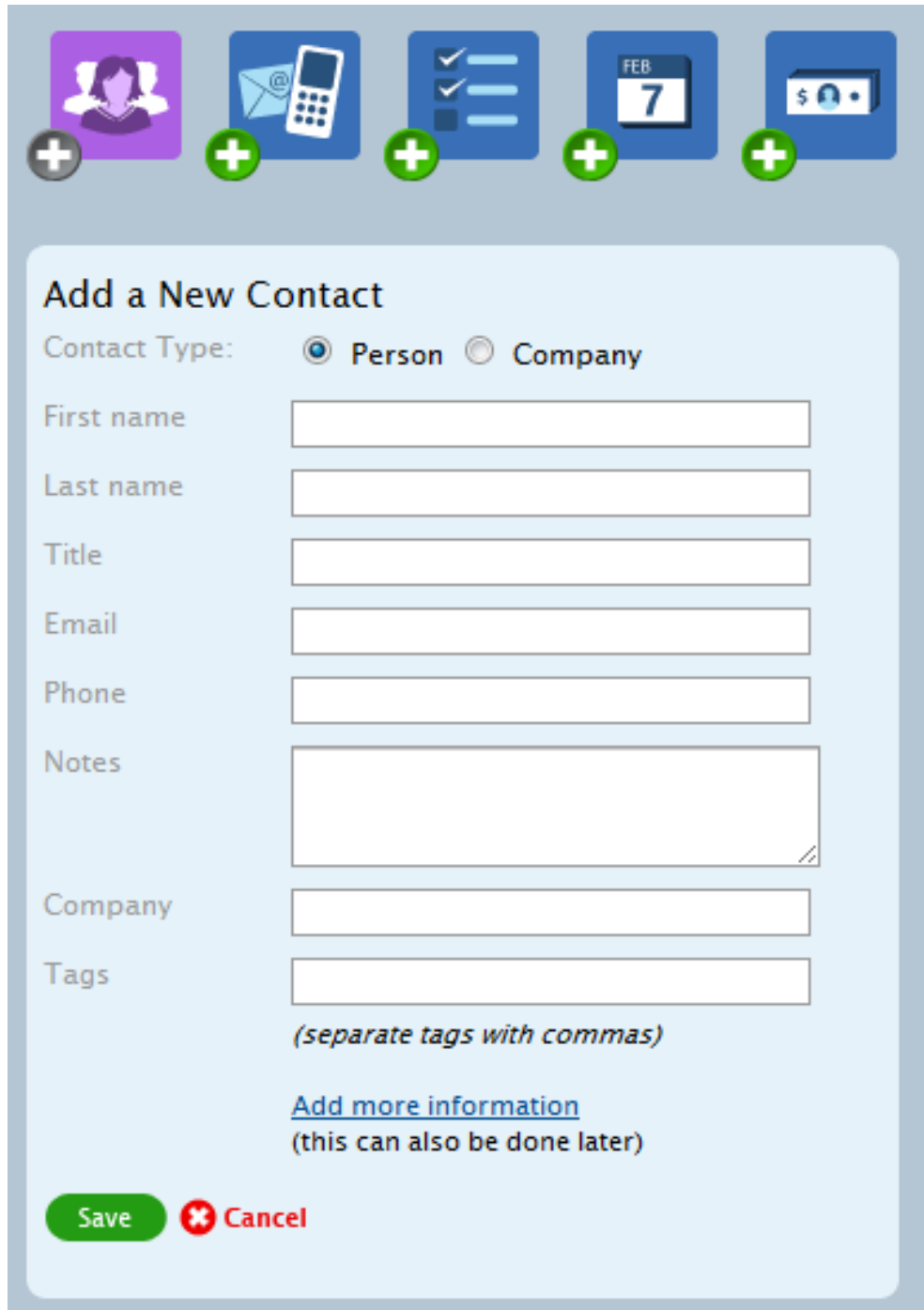
Each user you set up will get an email with instructions on setting up their own password. Be sure to tell new users to be on the lookout for an email from noreply@batchblue.com.

Adding Contacts

Adding a New Contact

To create a contact record, click the Add New Contact button in the sidebar of any Batchbook page, and follow the directions below:

Quick Add a new contact

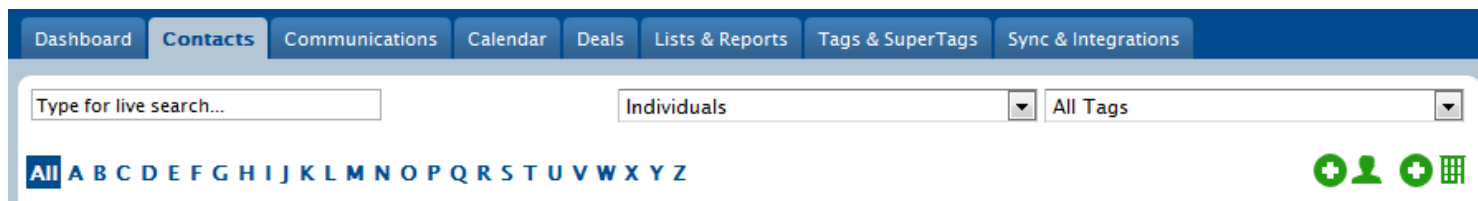


The screenshot shows a 'Quick Add a new contact' interface. At the top, there are five icons with green plus signs: a person, an envelope and phone, a checklist, a calendar, and a wallet. Below these is a light blue form titled 'Add a New Contact'. The form includes a 'Contact Type' section with radio buttons for 'Person' (selected) and 'Company'. Below this are input fields for 'First name', 'Last name', 'Title', 'Email', 'Phone', 'Notes' (a larger text area), 'Company', and 'Tags'. A note below the tags field says '(separate tags with commas)'. At the bottom of the form, there is a link that says 'Add more information (this can also be done later)'. At the very bottom are two buttons: a green 'Save' button and a red 'Cancel' button with a white 'X' icon.

Click either the Person or Company radio button. Enter the information you wish to capture (only first name / company name are required). To add more detailed information--like fax, website, and addresses--click Add more information. Click the Save button to save changes and create the new

record.

Add a Contact from the Contacts Tab

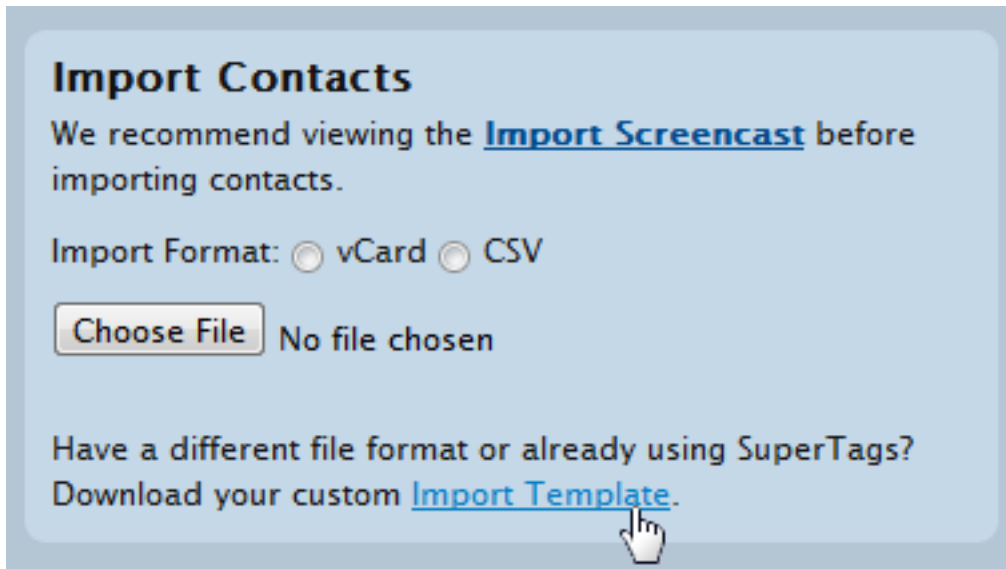


A full-add contact form can be accessed via the main Contacts tab by clicking the appropriate green add (+) button at the top of the contacts list, depending on whether you want to add a company record or a record for an individual person.

NOTE: When you enter a new Individual contact and fill in the Company field for that individual, Batchbook automatically creates a new Company contact record for you (just name, no other info).

Importing Contacts with the Import Template

Download the Import Template



You can find the Import Template by going to the Contacts tab and looking in the right hand column for this Import Contacts box. Just click to download the template.

Add your information to the import template

	A	B	C	D	E	F	G	H	I	J	K
1	firstname	lastname	jobtitle	company	tags	web_page	email	business_street	business_street_2	business_city	business_state
2				Harris Toys				759 Hollis Street		Denver	CO
3	Philip	LaBelle	Buyer	Harris Toys			plabelle@harristoys.net				
4				Mountain and Valley				9239 Crestview Drive		Homer	NY
5	Harriet	Caves	President	Mountain and Valley			harriet@mandv.com				
6				Roger and Sons, LLC				50 Sodgrass Road		Plainview	NV
7	Roger	Arrington	VP of Sale	Roger and Sons, LLC			roger3@rogerandsons.com				
8											

The import template will help you get all of your information to the right place in Batchbook.

Since Batchbook creates a separate record for company and individual, a best practice is to add the company specific information on its own line, above the individual specific information. In this example, the address will be stored on the company record, whereas the email and other person specific information will be stored on the individual record.

Upload a CSV file

Import Contacts

We recommend viewing the [Import Screencast](#) before importing contacts.

Import Format: vCard CSV

No file chosen

Tag Import?

Remove Duplicates?

Merge Duplicates?

Have a different file format or already using SuperTags?
Download your custom [Import Template](#).

To upload a spreadsheet, first save it as a .csv file. On the Import Contacts box, choose CSV as your import format and then click Choose File to locate the file stored on your computer. Click Go to import the file.

View contacts

Select: This Page All None			Showing 1 - 9 of 9 contacts.
<input type="checkbox"/>	 Roger Arrington III	VP of Sales Roger and Sons, LLC	
<input type="checkbox"/>	 Harriet Caves	President Mountain and Valley	
<input type="checkbox"/>	 Harris Toys	Personnel (1) Philip LaBelle	
<input type="checkbox"/>	 Philip LaBelle	Buyer Harris Toys	
<input type="checkbox"/>	 Mountain and Valley	Personnel (1) Harriet Caves	
<input type="checkbox"/>	 Roger and Sons, LLC	Personnel (1) Roger Arrington III	

As you can see, the information gets imported as two different types of records. Individuals are linked to companies as personnel.

Individual records will show company info

Contact Information

email: plabelle@harristoys.net (work)
web: <http://harristoys.net> (company)

phone: 1-800-545-9874 ext 17 (work)
1-800-545-9874 (company)

mobile:
fax:

address: 759 Hollis Street (company)
Denver, CO 64548
[map](#)

PRIMARY LOCATION:

When you have a person as an employee of a company, you will be able to see the company information on their record as well as their own information. Here, you can see that the company information is labeled as 'company'.

Using the Quick Add Buttons

What are the Quick Add buttons?

The Quick Add buttons



The Quick Add buttons are available on many of the pages in Batchbook. They allow you to quickly create new contacts, communications, to-dos, events, and deals.

If you use a Quick Add button when you have a contact open, the contact name will auto-fill into the appropriate Quick Add field.

Quick Add a New Contact

Quick Add a new contact

Add a New Contact

Contact Type: Person Company

First name

Last name

Title

Email

Phone

Notes

Company

Tags

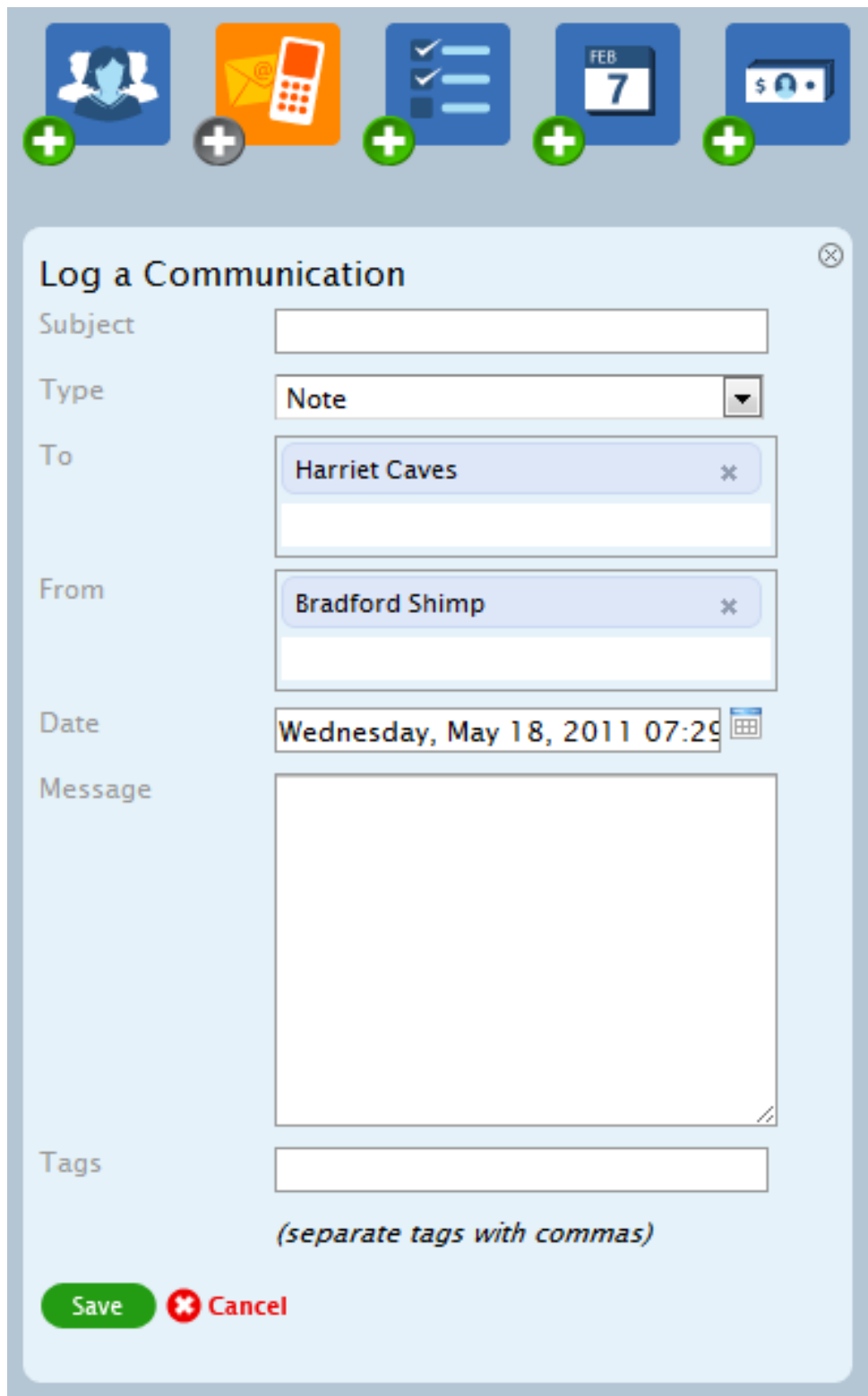
(separate tags with commas)

[Add more information](#)
(this can also be done later)

Click either the Person or Company radio button. Enter the information you wish to capture (only first name / company name are required). To add more detailed information--like fax, website, and addresses--click Add more information. Click the Save button to save changes and create the new record.

Quick Add a Communication

Click the Communication button



The screenshot shows a 'Log a Communication' dialog box with the following fields and values:


- Subject:** Empty text input field.
- Type:** Dropdown menu set to 'Note'.
- To:** Tagged contact 'Harriet Caves' with a close button (x).
- From:** Tagged contact 'Bradford Shimp' with a close button (x).
- Date:** 'Wednesday, May 18, 2011 07:29' with a calendar icon.
- Message:** Large empty text area.
- Tags:** Empty text input field.

Below the Tags field, the instruction *(separate tags with commas)* is displayed. At the bottom of the dialog are two buttons: a green 'Save' button and a red 'Cancel' button with a white 'x' icon.

You can select from multiple communication types, or add your own. The To: and From: fields are for you to track who the communication is between. These fields will autofill if you Quick Add the communication from a contact page.

View the Communication

Activity Log ⊖

 [Met at Toy Fair Austin](#) 05/18/2011
Note from [Bradford Shimp](#) to [Harriet Caves](#)

When you add a communication and attach it to a contact, it will show up in the activity log on that contact's page.

Quick Add a To-Do

Click the to-do button

Create a To-Do ⓧ

Do this thing:

Due Date:

***Example:** 4/1/2008, today, tomorrow, in two weeks ([see more](#))*

Set Time?

Details:

Attach To: ✕

Tags:

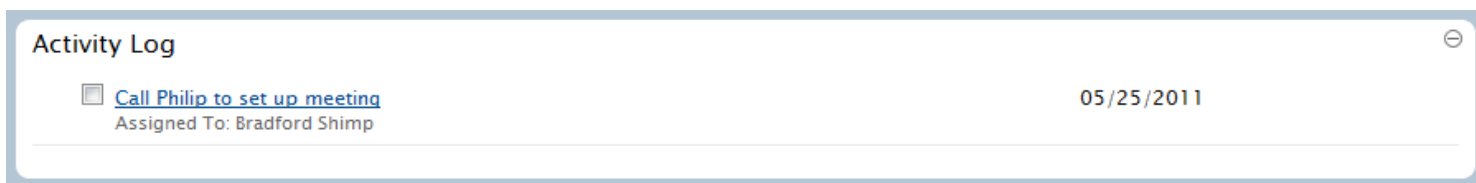
(separate tags with commas)

Flagged:

Fill out the required fields and any other information regarding your task.

If you click the Quick Add button while viewing a contact record, the contact name will automatically be filled in to the Attach To: field.

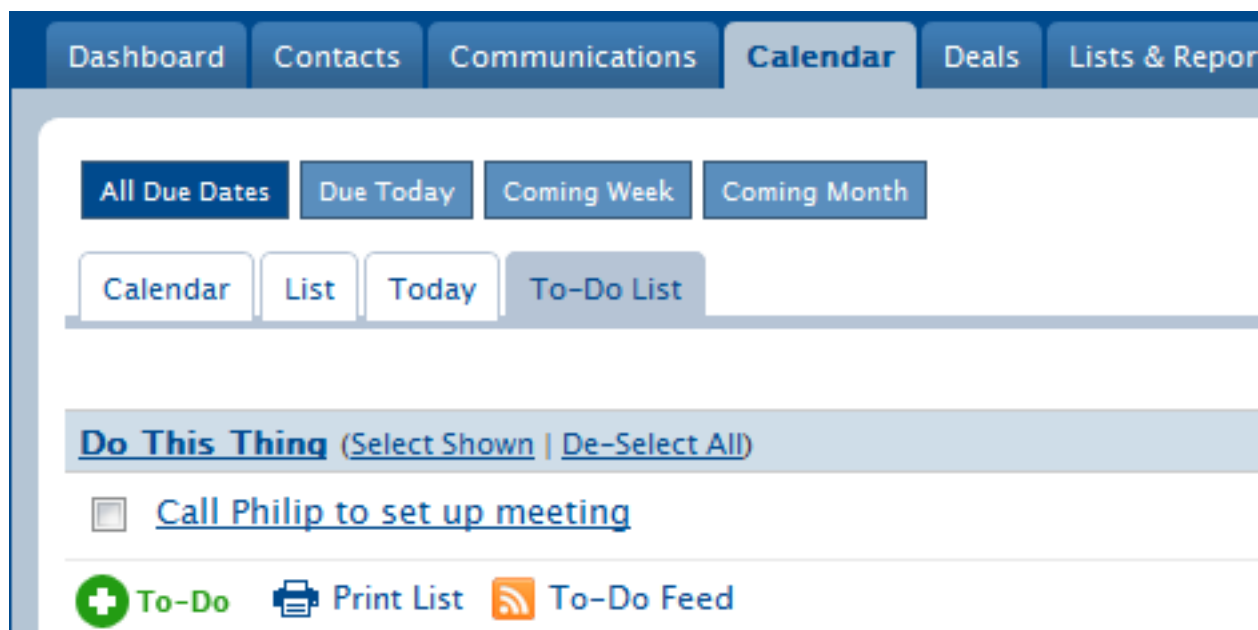
View the to-do in the Activity Log



The screenshot shows a single entry in an 'Activity Log' window. The entry is a to-do item: 'Call Philip to set up meeting', which is a blue hyperlink. Below the link, it says 'Assigned To: Bradford Shimp'. To the right of the entry, the date '05/25/2011' is displayed. The window has a title bar 'Activity Log' and a close button in the top right corner.

When a To-Do is attached to a contact, it will show up in the Activity Log for that contact.

Use the To-Do List

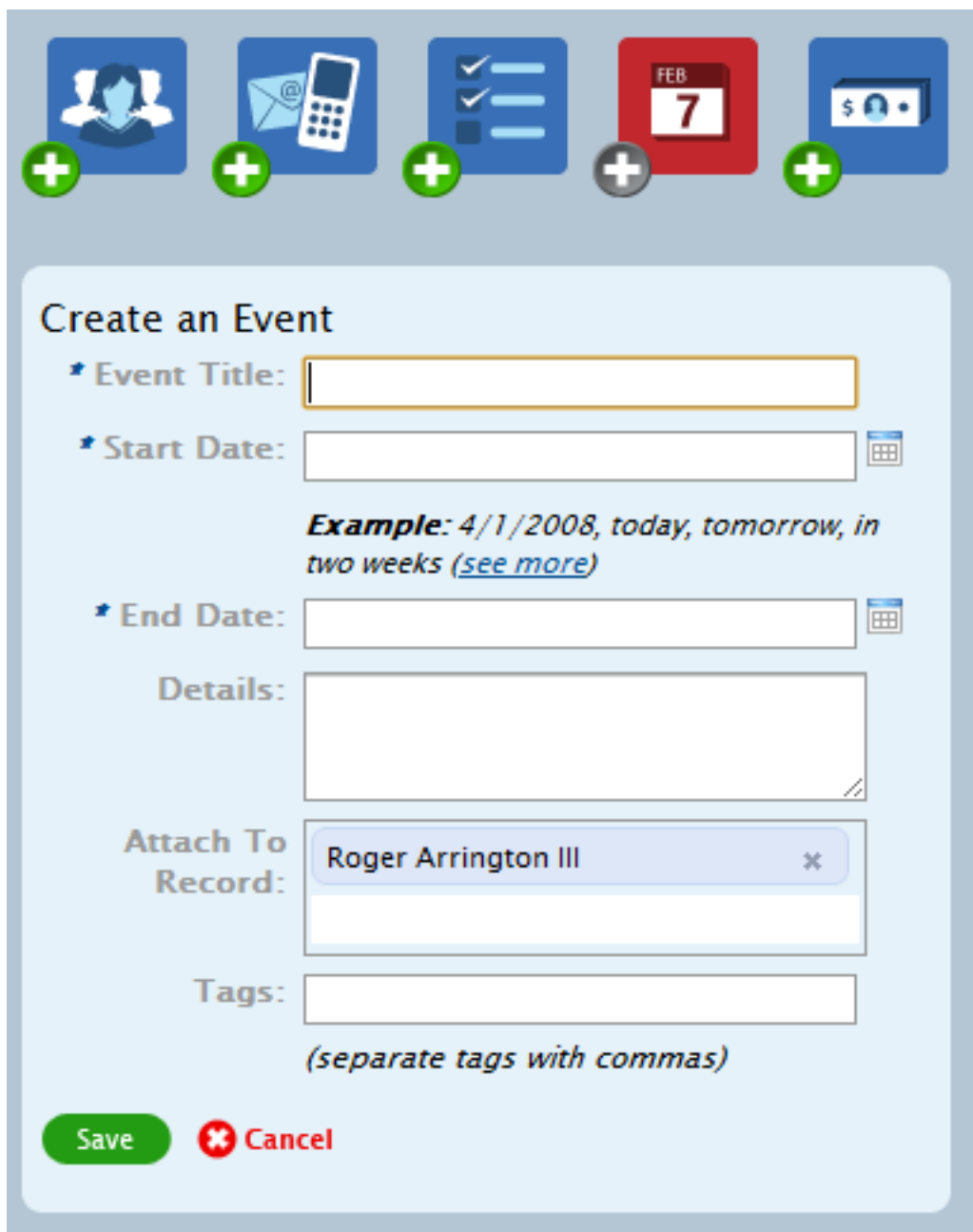


The screenshot shows the 'Calendar' tab selected in a navigation menu. Below the navigation menu, there are several filter buttons: 'All Due Dates', 'Due Today', 'Coming Week', and 'Coming Month'. Underneath these are more filter buttons: 'Calendar', 'List', 'Today', and 'To-Do List', with 'To-Do List' being the active selection. Below the filters, there is a header for the list: 'Do This Thing (Select Shown | De-Select All)'. The main content area shows a single to-do item: 'Call Philip to set up meeting' with a checkbox to its left. At the bottom of the list, there are three action buttons: 'To-Do' (with a green plus icon), 'Print List' (with a printer icon), and 'To-Do Feed' (with an RSS icon).

You can view all of your tasks in the To-Do List, which you can access on the Calendar tab or with the Dashboard widget.


Quick Add an Event

Click the event button




Create an Event


* **Event Title:**

* **Start Date:** 

***Example:** 4/1/2008, today, tomorrow, in two weeks ([see more](#))*

* **End Date:** 

Details:

Attach To Record: 

Tags:


(separate tags with commas)


Fill in all the required fields, and any other fields you wish to fill out.

When you Quick Add an event from a contact page, the contact will automatically be filled into the Attach To Record: field.

View the event

Activity Log ⊖

 [Presentation Meeting](#) 07/13/2011

 [Print All](#)

When an event is attached to a contact, you can view it in that contact's activity log.

Use the calendar

« June July 2011 August »

Tue Wed Thu

27	28	29	30
4	5	6	7
11	12	13 <div style="background-color: #d9ead3; padding: 2px;">Presentation Meeting</div>	14
18	19	20	21

Your events will also show up on your calendar in Batchbook.

Quick Add a Deal

Click the deal button

Add New Deal

Deal Name

Description

Who is this deal with?

Status:

Assigned To:

Amount:

Tags:

(separate tags with commas)

When you create a deal, you need to give it a name and choose a status. You can also add other information as needed.

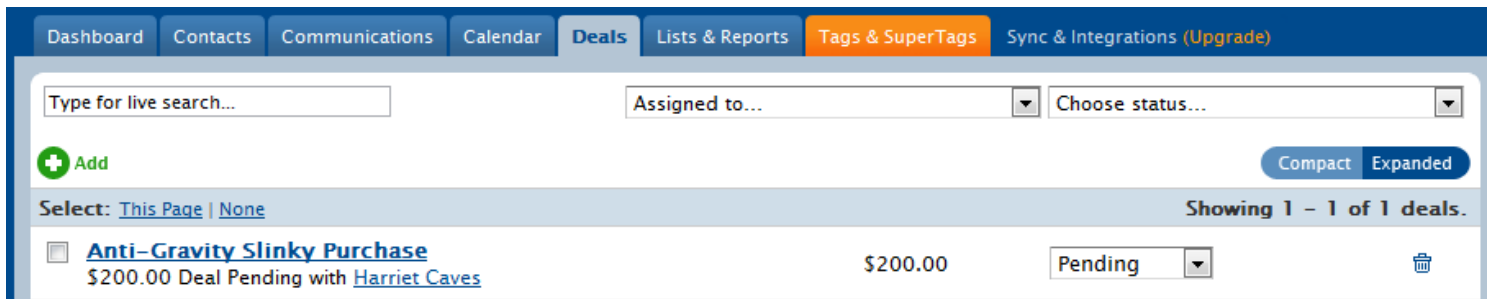
When you Quick Add a deal from a contact page, the contact name will automatically be filled in the Who is this deal with? field.

View a link to the deal



When you have a deal with a contact, you will see a link to the deal from that contact's page.

View the Deals tab



All the deals that you create can also be accessed from the Deals tab.

Organizing with SuperTags and Lists

What is a SuperTag

A SuperTag allows you to group similar records together in the same way that a tag does, with one important distinction: SuperTags not only tag a record with a certain word or phrase but also allow you to add additional fields and relevant information to that record.

For example, a flower shop owner might want to know what season certain nurseries are open, so s/he might add a "Nursery" SuperTag on all records for nurseries. S/he can then add a "Season" custom field to that SuperTag, along with any information s/he might want to track for each nursery. Or, a real estate agency might wish to add information about which hours properties can be shown and whether there are pets on the premises.

Click the **Tags & SuperTags** tab in the main navigation bar to [start creating SuperTags](#). You can choose from a number of field types to create and further customize your SuperTag data:

Text (long or short)

Number

Yes or No

Phone

E-mail

Website

Date

Recurring Date (monthly or yearly)

Feed Reader


Multiple Choice (radio buttons, check boxes, or pull-down menu)

Currency



Assigned To

[Check out the screencast showing off the power of SuperTags.](#)


Example: Flower Shop

Green Toe Nursery and Rock and Roll Shop 

Record Created: Apr 20, 2011
Last Updated: Apr 20, 2011
Total Comms: 0
Last Comm: Never

nursery   Tag

Search for Green Toe Nursery and Rock and Roll Shop's social network accounts [Search social network](#)

SuperTags 

NURSERY [SAVE](#) [CANCEL](#)


Season

- Winter
- Spring
- Summer
- Fall



[Save](#) [Cancel](#)

With a SuperTag, the flower shop owner can select to show which seasons a specific nursery is open.


Example: Real Estate

645 West Hill Street 

Record Created: Apr 20, 2011
Last Updated: Apr 20, 2011
Total Comms: 0
Last Comm: Never

property details   Tag

Search for 645 West Hill Street's social network accounts [Search social network](#)

SuperTags 

PROPERTY DETAILS [SAVE](#) [CANCEL](#)

Available Days

- Sun
- Mon
- Tues
- Wed
- Thurs
- Fri
- Sat

Available Hours

- Morning
- Afternoon
- Evening

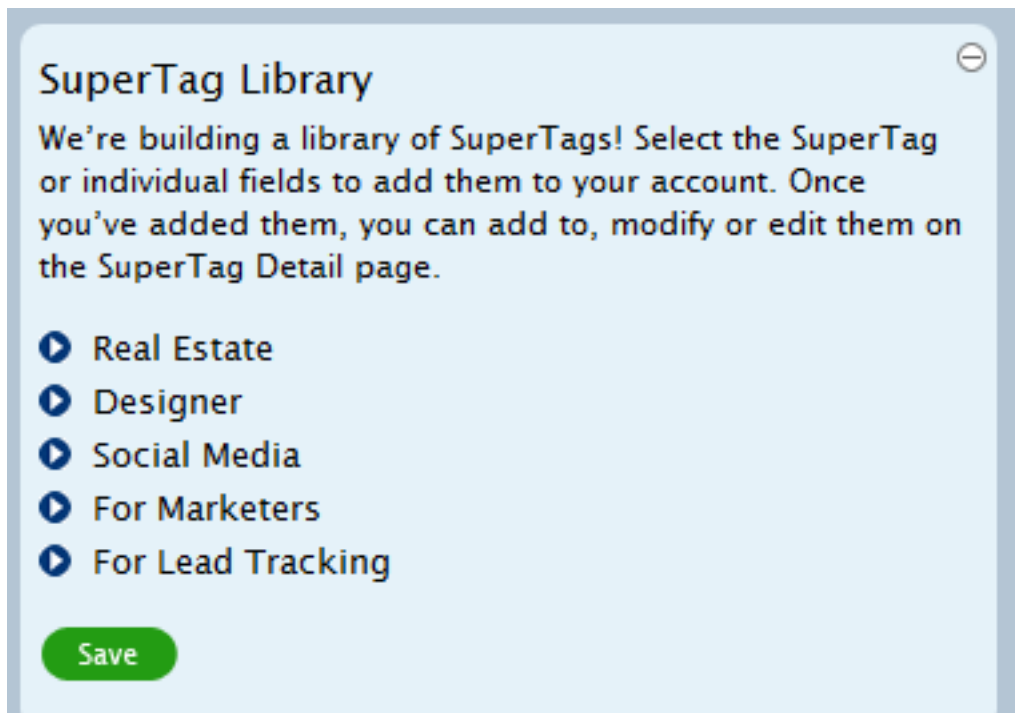
Pets On Site

- yes
- no

[Save](#) [Cancel](#)

A real estate agent can track property details, such as when the property can be shown and if there are any pets on premises.

Choose a Starter SuperTag



We have developed a few starter SuperTags that you can get started with. Each of these can be edited to meet your specific needs. Check them out to get an idea of the kind of information you can track with a SuperTag. Access the SuperTag library from the Tags & SuperTags tab.

Select which field sets to use

SuperTag Library

We're building a library of SuperTags! Select the SuperTag or individual fields to add them to your account. Once you've added them, you can add to, modify or edit them on the SuperTag Detail page.

▼ Real Estate
[\(Toggle All\)](#)

- Agent (2 fields)
- Property (10 fields)
- Inspector (1 fields)
- Potential Client (2 fields)
- Client (8 fields)
- Mortgage Broker (2 fields)
- Contractor (2 fields)
- Birthday (2 fields)

▶ Designer

▶ Social Media

▶ For Marketers

▶ For Lead Tracking

Save

When you click on the category, you will be given options for which field sets to use. To choose your SuperTags from the library, check the box next to the field sets you want and click save.

How to Create a SuperTag

What is a SuperTag?

Creating a SuperTag is easy. Below you will find a step by step tutorial on how to do it.

Before you build a SuperTag, it is always good to think about all the information you want to collect. This is especially important while creating multiple choice fields, as you can't rearrange the order of the choices after you add the field.

Step One

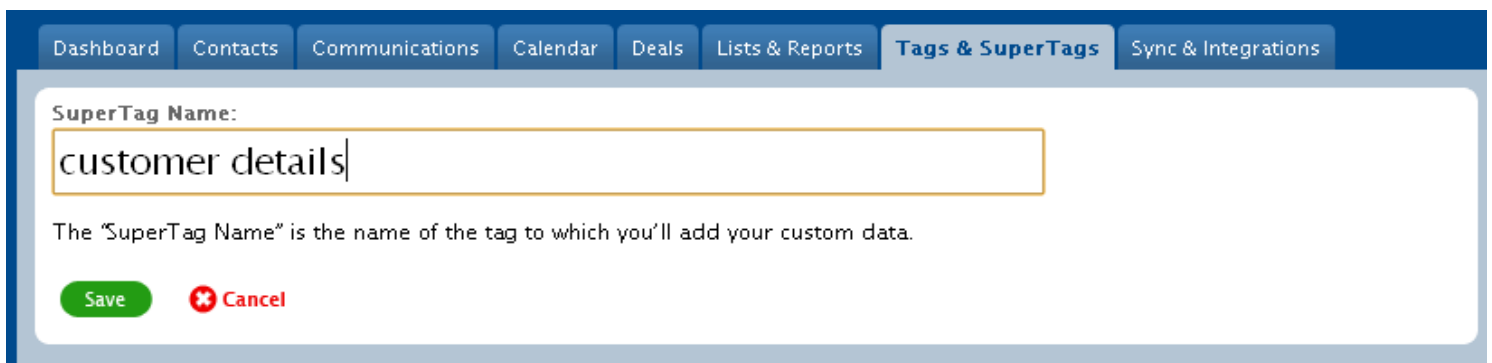


1. Go to the Tags & SuperTags tab
2. Make sure you are in the Manage SuperTags sub-tab
3. Click on Add

You can also turn any existing tag into a SuperTag. To do this, go to the Manage Tags tab and click SuperTag It next to the tag you want to convert.

Note: Only Admin level users can access the Tags & SuperTags tab. Basic and Advanced users can still use Tags and SuperTags, but they cannot create them.

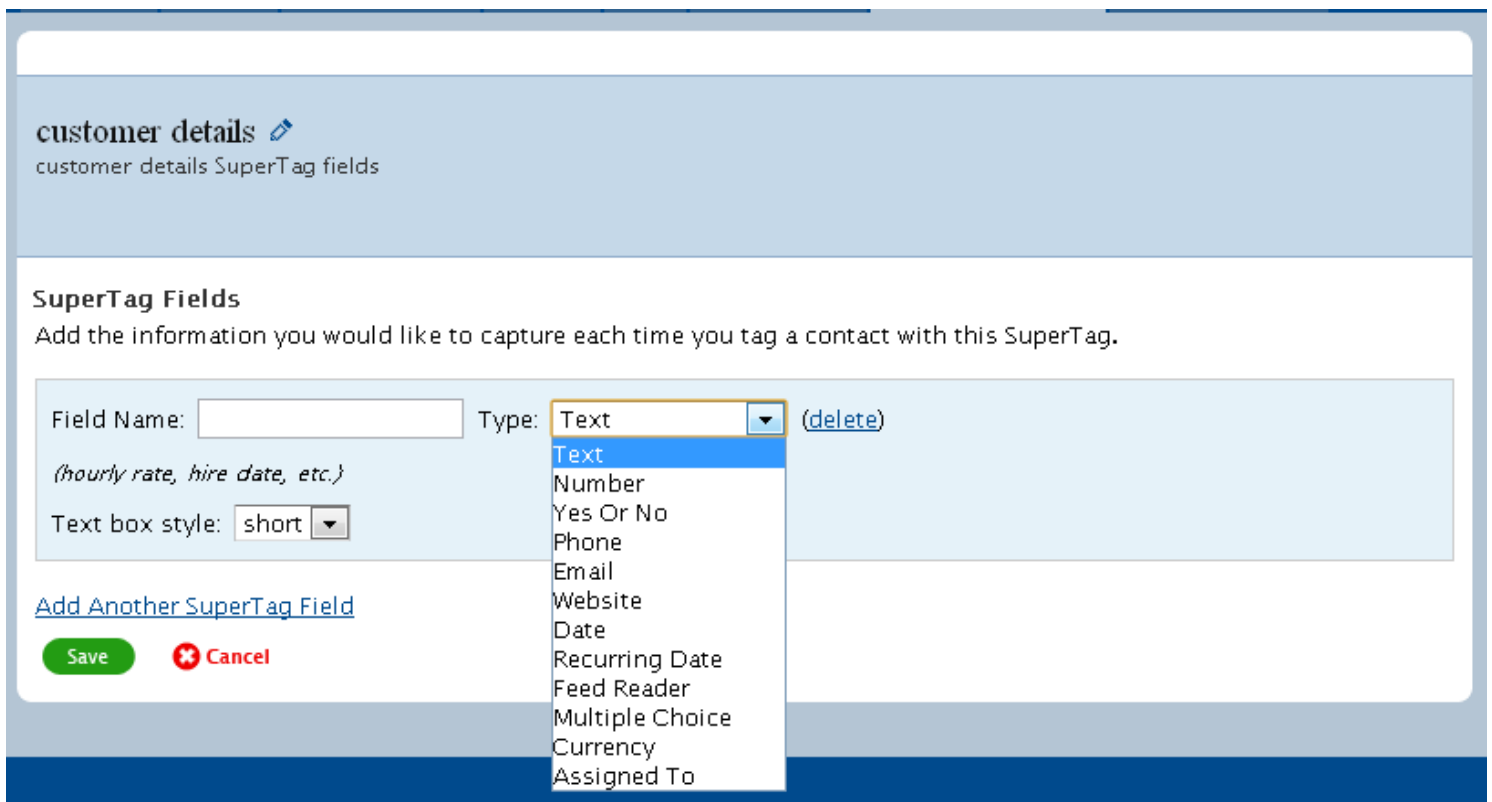
Step Two



The screenshot shows a navigation bar with tabs: Dashboard, Contacts, Communications, Calendar, Deals, Lists & Reports, **Tags & SuperTags**, and Sync & Integrations. Below the navigation bar is a form titled "SuperTag Name:". The input field contains the text "customer details". Below the input field is a descriptive sentence: "The 'SuperTag Name' is the name of the tag to which you'll add your custom data." At the bottom of the form are two buttons: a green "Save" button and a red "Cancel" button with a red 'x' icon.

Give your SuperTag an easy to remember name

Step Three



The screenshot shows the "customer details" SuperTag configuration page. At the top, it says "customer details" with an edit icon and "customer details SuperTag fields". Below this is the "SuperTag Fields" section with the instruction: "Add the information you would like to capture each time you tag a contact with this SuperTag." There is a form for adding a field with the following elements: "Field Name:" followed by an empty input box; "Type:" followed by a dropdown menu currently set to "Text" and a "(delete)" link; a note "(hourly rate, hire date, etc.)"; "Text box style:" followed by a dropdown menu set to "short". A list of field types is shown in a dropdown menu: Text, Number, Yes Or No, Phone, Email, Website, Date, Recurring Date, Feed Reader, Multiple Choice, Currency, and Assigned To. At the bottom left are "Save" and "Cancel" buttons. A link "Add Another SuperTag Field" is also visible.

You can add fields to any SuperTag (that is what makes them Super!). These fields can be used to store any custom information, and they are great for displaying the info in the contact or deal as well as for filtering your search results.

1. Give your field a name, this will show up as the label for the field.
2. Choose which field type you want to use. We provide a lot of helpful options.
3. You can further customize some field types, for instance a text field can be set to short or long.
4. When you need another field, just click to add. You can add as many fields as you need to a SuperTag.
5. Don't forget to click Save!

Note: If you are planning to use the SuperTag fields in a web form, we suggest avoiding date and number fields, using text fields to collect that information instead. This is because if someone types Ten instead of 10, it can cause an issue with your form.

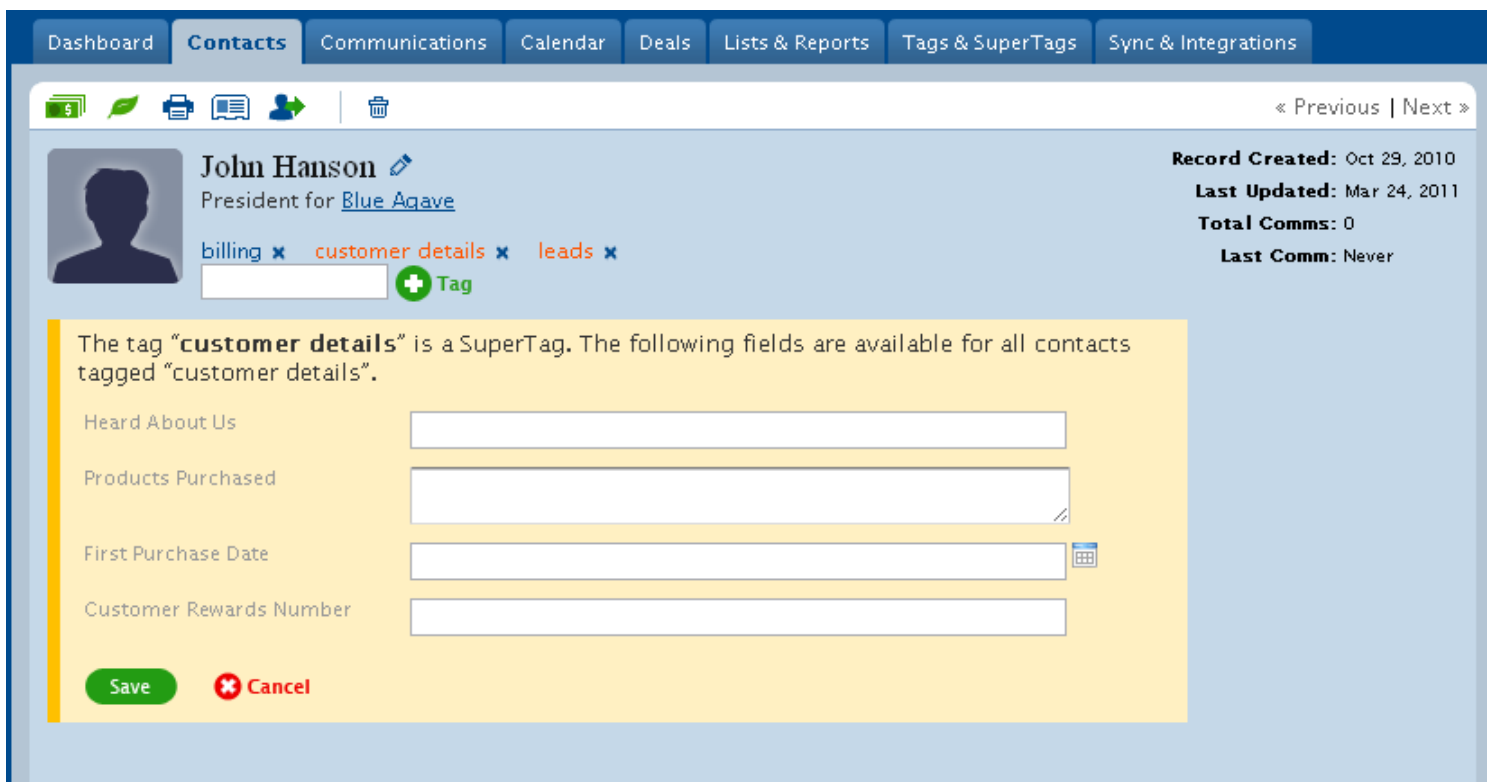
Step Four



The screenshot shows a contact record for John Hanson, President for Blue Agave. The record was created on Oct 29, 2010, last updated on Mar 23, 2011, with 0 total communications and no last communication. A search bar at the bottom allows finding John Hanson's social network accounts. In the tag area, the text "customer details" is entered into a text box, and a green "+ Tag" button is visible next to it.

To add a SuperTag to a Contact or Deal, type the name of the SuperTag into the Tag box and then click the + Tag button.

Step Five



The screenshot shows the same contact record for John Hanson, but now with three tags: "billing" (blue), "customer details" (orange), and "leads" (blue). A yellow pop-up box is displayed, explaining that "customer details" is a SuperTag and listing available fields: "Heard About Us", "Products Purchased", "First Purchase Date", and "Customer Rewards Number". Each field has a corresponding input box. At the bottom of the pop-up are "Save" and "Cancel" buttons.

When a SuperTag is added to a record, it will be orange. Normal tags are blue.

When you first add a SuperTag, you will get this pop up box where you can input your information


Step Six

The screenshot shows a user profile for John Hanson, President for Blue Agave. The profile includes a name, title, and a 'customer details' tag. To the right, there are statistics: Record Created (Oct 29, 2010), Last Updated (Mar 23, 2011), Total Comms (0), and Last Comm (Never). Below the profile is a search bar for social network accounts. The SuperTags section is expanded to show customer details in a table format.

« Previous | Next »


John Hanson 
President for [Blue Agave](#)

Record Created: Oct 29, 2010
Last Updated: Mar 23, 2011
Total Comms: 0
Last Comm: Never

customer details   Tag

Search for John Hanson's social network accounts

SuperTags

CUSTOMER DETAILS 

Heard About Us	Farmer's Market - Clyde
Products Purchased	Toy Chest
First Purchase Date	Feb 03, 2011
Customer Rewards Number	34212

View any information you entered in the SuperTag in the SuperTags box under a Contact or Deal.

If you want to add or edit information, click on the blue edit pencil.

You can also minimize the SuperTag box by clicking on the - in the top right corner. If it is minimized, you can maximize it by clicking on the +.

Viewing SuperTag Info

The SuperTags Box

The screenshot shows a contact profile for Philip LaBelle. At the top, there are navigation icons (home, print, chat, share, trash) and a « Previous | Next » link. The contact's name is Philip LaBelle, with a pencil icon for editing. Below the name, it says "Buyer for Harris Toys". There is a "leads" tag with a close icon and a "Tag" button with a plus icon. To the right, there are statistics: "Record Created: May 18, 2011", "Last Updated: May 19, 2011", "Total Comms: 0", and "Last Comm: Never". Below this is a search bar for social network accounts with a "Search social network" button. The SuperTags section is titled "SuperTags" and contains a "LEADS" tag. The tag details are as follows:

Lead Status	Warm
Do Next	Phone Call
Region	West
Rep	Bradford Shimp

SuperTag information appears in the main section of your contact or deal view.

When there is no info filled in

The screenshot shows a SuperTag section titled "SuperTags" with a "LEADS" tag. The tag details are empty, and there is a blue edit pencil icon in the top right corner of the tag area.

If you have a SuperTag assigned, but haven't filled in any of the fields, this is what the SuperTag will look like. To access the fields and fill them out, simply click on the blue edit pencil.

SuperTag box can be minimized



The screenshot shows a CRM record for Roger Arrington III, VP of Sales for Roger and Sons, LLC. The record includes a profile picture, name, title, and company. A 'leads' tag is visible. On the right, there are statistics: Record Created: May 18, 2011; Last Updated: May 19, 2011; Total Comms: 0; Last Comm: Never. Below the record is a search bar for social network accounts with a 'Search social network' button. At the bottom, there is a 'SuperTags' box that is currently minimized, indicated by a plus sign icon in the top right corner. A red arrow points to this plus sign icon.

If you have a SuperTag assigned to a record (SuperTags show up in orange) but do not see them in the SuperTags box, you may have the box minimized. If so, just click the plus button in the SuperTags box to maximize it and view your SuperTag info.

How to Build a List

Lists are a great way to gather information to view, export, or even work from. Here is how you can build a list in Batchbook.

Step One

Lists	Contacts	Last Updated	
Deals	9	03/24/2011	View Report Edit Delete
Created in 2011	0	03/24/2011	View Report Edit Delete
Ice Cream Form	11 (2 pending)	03/24/2011	View Report Edit Delete

Go to the Lists & Reports tab and then click on + Contact List.

Step Two

Get started by giving your list a name and description.

List Name *

Hot Leads

Description

List of all hot leads, company-wide.

Save

Delete Contacts & List

Give your list a name. If you like, you can also give your list a description. Be sure to click Save.

Step Three

The screenshot shows a CRM interface with a navigation bar at the top containing 'Dashboard', 'Contacts', 'Communications', 'Calendar', 'Deals', 'Lists & Reports', 'Tags & SuperTags', and 'Sync & Integrations'. Below the navigation bar, there is a header for 'Hot Leads' with a list of all hot leads, company-wide. The header also displays 'Record Created: Mar 24, 2011' and 'Last Updated: Mar 24, 2011'. The main content area is titled 'Contact List' and asks 'How would you like to add records to your list?'. There are two radio button options: 'Add All Records' (unselected) and 'Add by Search Criteria' (selected). The 'Add by Search Criteria' option has a description: '(Build a list from searching tags, contact information, SuperTag data ... anything!)'. Below the options, there is a section titled 'Add or remove criteria below:'. It contains two search criteria: 'Record Type is: Individual' and 'Leads: Lead Status is: Hot'. A red arrow points to the '+' button after the first criterion. A black button with white text 'Add search criteria' is also visible. A 'Search' button is located at the bottom left of the search criteria section.

To pull a list of all records, select Add All Records.

Choose Add by Search Criteria to build a list of specific records. You can choose which field to search on, including SuperTag fields.

To add more criteria to the search, click the + after the first set of criteria. It is a good idea to do the broadest search first and then narrow the list down with additional search criteria. Click to Search.

Step Four

Contact List

How would you like to add records to your list?

Add All Records

(Build a list from all contacts to export to vCard or CSV, print labels, back up, etc.)

Add by Search Criteria

(Build a list from searching tags, contact information, SuperTag data ... anything!)

Add or remove criteria below:

Record Type is:

and Leads: Lead Status is:

Showing 1 – 7 of 7 records.

Hiram Appleby	Individual	Remove from list
Jill Diamond	Individual	Remove from list
Nancy Goodfellow	Individual	Remove from list
Janice Green	Individual	Remove from list
Jarvis Greenwood	Individual	Remove from list
John Hanson	Individual	Remove from list
Jake Longworth	Individual	Remove from list

All of the records found by your search will show up in the list. You can hover over the names to view details, click to go to the records or you can remove them from the list.

Step Five

List Data

Select the data you'd like to include by checking or unchecking the appropriate boxes below. When finished, click "save".

- Name
- Type
- Title
- Company
- Tags
- Notes
- Communications
- Id

Contact Information

- Primary
[\(Toggle All\)](#)
 - Email
 - Phone
 - Cell
 - Fax
 - Website
 - Address

- Home
- Work
- Other
- Main (companies only)

Deal Information

Only applied to exported deals.

[\(Toggle All\)](#)

- Title
- Description
- Deal With
- Amount
- Status

SuperTag Data

If these contacts are SuperTagged, choose the relevant fields below to include them in reports and CSV exports. [\(Select All\)](#)
[\(Deselect All\)](#)

- time tracking
- how did you hear about us
- close date
- sales process
[\(Toggle All\)](#)

- Level of interest
- Materials shared
- Meeting date

- social media
- status
- fda
- lists
- prospect qualifier
- experience
- vendor
- illinois businesses
- organization size
- organization details
- global locations
- fluid power
- reg-synd
- 11 hour_survey
- red
- affiliates
- batchbook customers
- test rsvp

If you want to export your list or view it as a report, you will need to select which fields to show. In the List Data section, click on the blue edit pencil to open up all of your field options. Check the boxes next to the fields you want shown in your report. You can even add SuperTag fields.

After you check the fields you want, be sure to click Save.

Note: Use Deal Information and Communication Information fields when you are creating a list of Deals or Communications. It is always a good idea to filter your list to include just Contacts (Individuals and Companies), just Deals, or just Communications, as these all have different fields and look differently when you export them. You can filter the list by choosing Record Type in the search filters.

Step Six

List Data

The following data will be included in your list (as well as the report for this list):

- *Name*
- *Company*
- *Primary Location (Email, Phone)*
- *Sales process SuperTag (Level of interest)*

 Print Labels  Export CSV  Export vCards  View Report

Include employees of companies in exports/report?:

Once you add some fields in the List Data section, you can do several things with your list. You can print labels, export as CSV (which you can open in any Spreadsheet program), export vCards, or View your Report. You can also view your lists on your Dashboard using the Lists View widget.

Note: If you look up companies in your list but also want to see employees, you can check the box here to pull them into your report.

Exporting Lists

View Your Lists

Lists & Reports

<u>Lists</u>	<u>Contacts</u>	<u>Last Updated</u>
Need to Call	3	05/18/2011
Customers	0	05/18/2011
New Leads	3	05/18/2011
Import 05/18/2011	6	05/18/2011

See all of your saved lists on the Lists & Reports tab.

The List View

Contact List

How would you like to add records to your list?

Add All Records
(Build a list from all contacts to export to vCard or CSV, print labels, back up, etc.)

Add by Search Criteria
(Build a list from searching tags, contact information, SuperTag data ... anything!)

Add or remove criteria below:

State contains: NY


Showing 1 - 56 of 56 records.

Hiram Appleby	Individual	Remove from list
Kristin Baker	Individual	Remove from list
Juliana Balestin	Individual	Remove from list
Tina Baltzer	Individual	Remove from list
Shadene Barosy	Individual	Remove from list
Isabel Blumberg	Individual	Remove from list
Lynn Branecky	Individual	Remove from list
Robin Brown	Individual	Remove from list
Catherine Carron	Individual	Remove from list

When you open a list, you will see all of the records which meet your list search criteria.





The List Data section

Nancy Ethridge	Individual	Remove from list
Vadim Govorov	Individual	Remove from list
Green Dynamics	Company	Remove from list
Torie Greenberg	Individual	Remove from list

List Data 

The following data will be included in your list (as well as the report for this list):


- *Name*
- *Company*
- *Primary Location (Email, Phone, Cell, Fax, Website, Address)*


 [Print Labels](#)  [Export CSV](#)  [Export vCards](#)  [View Report](#)

Include employees of companies in exports/report?:

Below the list of records, you will see the List Data section. This is where you can print labels, export to CSV or vCards, or you can view the report in Batchbook. Before exporting to CSV, you will want to edit the list data fields to export.


The Dashboard Lists Widget

Lists View 

Select List: 

1 - 7 of 7 contacts.


Name	Type
Hiram Appleby (Horace Treats)	Individual
Jill Diamond (Lily Pad Babies and Things)	Individual
Nancy Goodfellow	Individual
Janice Green (Klingon Biotech)	Individual
Jarvis Greenwood (Greenwood Farms)	Individual
John Hanson (Blue Agave)	Individual
Jake Longbottom	Individual

 [view report](#)

You can also view any of your lists from the Dashboard. Simply enable the Lists View widget and choose which list to view from the Select List dropdown.

Select which fields to export

Edit your List Data fields


List Data 

Select the data you'd like to include by checking or unchecking the appropriate boxes below. When finished, click the Save button.

<input checked="" type="checkbox"/> Name	SuperTag Data If these contacts are SuperTagged, click the appropriate boxes to include them in reports and CSV exports.
<input type="checkbox"/> Type	
<input type="checkbox"/> Title	
<input checked="" type="checkbox"/> Company	
<input type="checkbox"/> Tags	
<input type="checkbox"/> Notes	
<input type="checkbox"/> Communications	
<input type="checkbox"/> Id	
Contact Information	<input type="checkbox"/> time tracking
<input checked="" type="checkbox"/> Primary	<input type="checkbox"/> how did you hear about us
	<input type="checkbox"/> close date
	<input type="checkbox"/> sales process
	<input type="checkbox"/> social media
	<input type="checkbox"/> status
	<input type="checkbox"/> fda
	<input type="checkbox"/> lists

To choose which fields to export for a CSV file, click on the blue edit pencil in the List Data section. When you do, you will be able to select which fields to export (including SuperTag fields) by checking the box next to each field. Be sure to click save.

See which fields you have selected

List Data 

The following data will be included in your list (as well as the report for this list):

- Name
- Company
- Primary Location (Email, Phone, Cell, Fax, Website, Address)

[Print Labels](#) [Export CSV](#) [Export vCards](#) [View Report](#)

Include employees of companies in exports/report?:

You can see which fields you have selected for export by looking in the List Data section.

Send your list to a spreadsheet

Export to CSV

List Data

The following data will be included in your list (as well as the report for this list):

- *Name*
- *Company*
- *Primary Location (Email, Phone, Cell, Fax, Website, Address)*

 Print Labels  **Export CSV**  Export vCards  View Report

Include employees of companies in exports/report?:

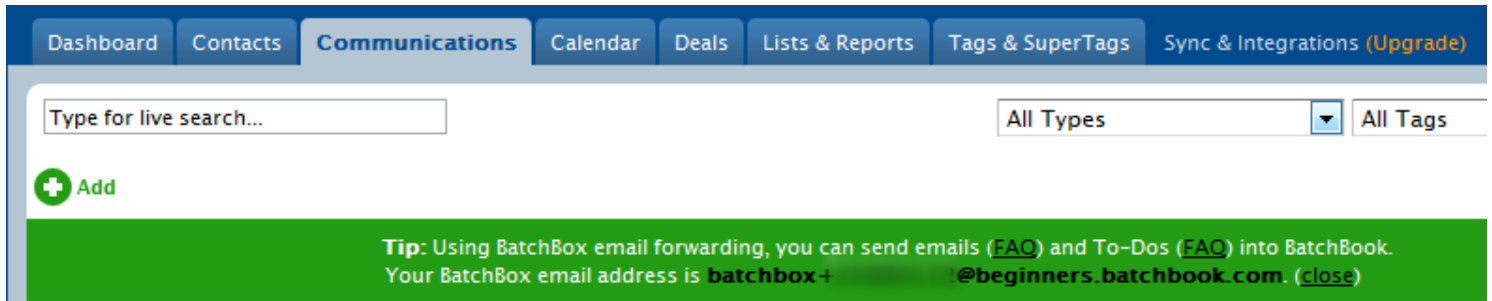
When you want to view your list in a spreadsheet, choose to export it to a CSV file. This will give you a file that can be opened in your spreadsheet program.

Adding Emails as Communications

What is Batchbox?

Batchbox is an e-mail forwarding address that's unique to your Batchbook account. Your Batchbox e-mail address lives both on the main Communications tab and in Your Account, under the E-mail Settings tab. When you e-mail your Batchbox address, a communication is logged in Batchbook and, when possible, associated with the correct contact(s).

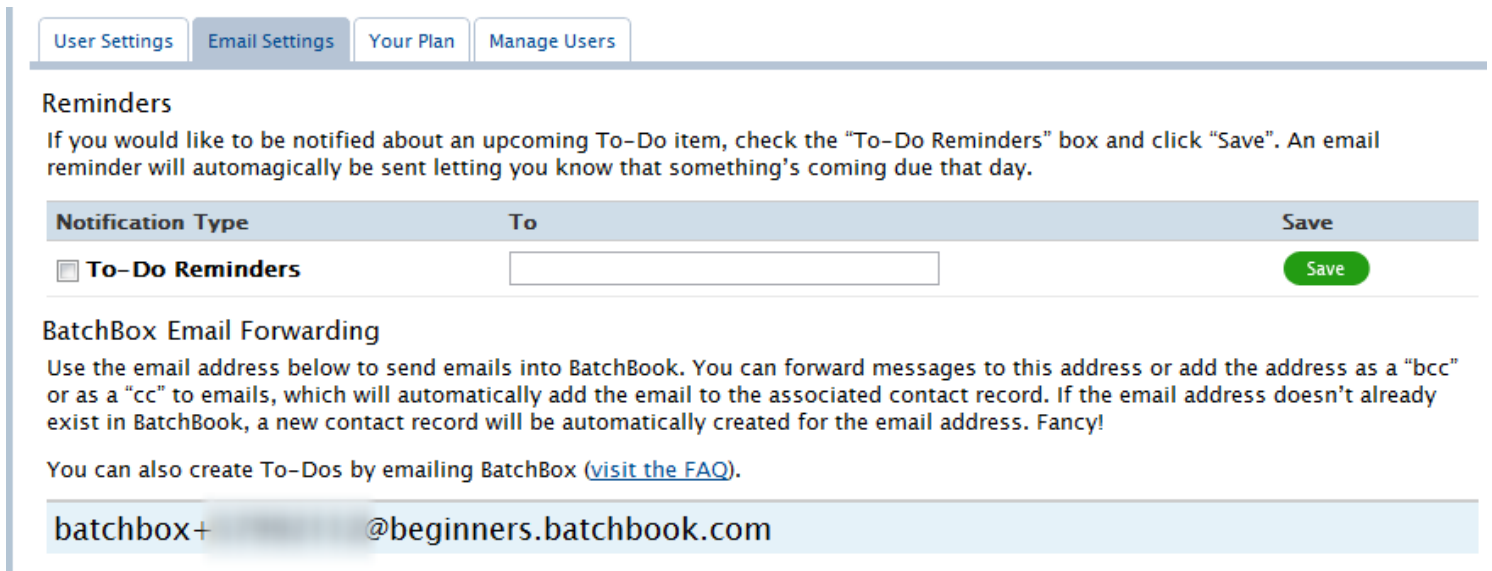
Find your Batchbox email address on your communications tab



The screenshot shows the Batchbook interface with the 'Communications' tab selected. At the top, there are navigation tabs: Dashboard, Contacts, Communications (active), Calendar, Deals, Lists & Reports, Tags & SuperTags, and Sync & Integrations (Upgrade). Below the tabs is a search bar with the placeholder text 'Type for live search...'. To the right of the search bar are two dropdown menus: 'All Types' and 'All Tags'. Below the search bar is a green '+ Add' button. A green banner at the bottom of the screenshot contains the following text: 'Tip: Using BatchBox email forwarding, you can send emails (FAQ) and To-Dos (FAQ) into BatchBook. Your BatchBox email address is batchbox+@beginners.batchbook.com. (close)'

When you first use Batchbook, you will see this banner on the Communications tab, which includes your unique Batchbox email address.

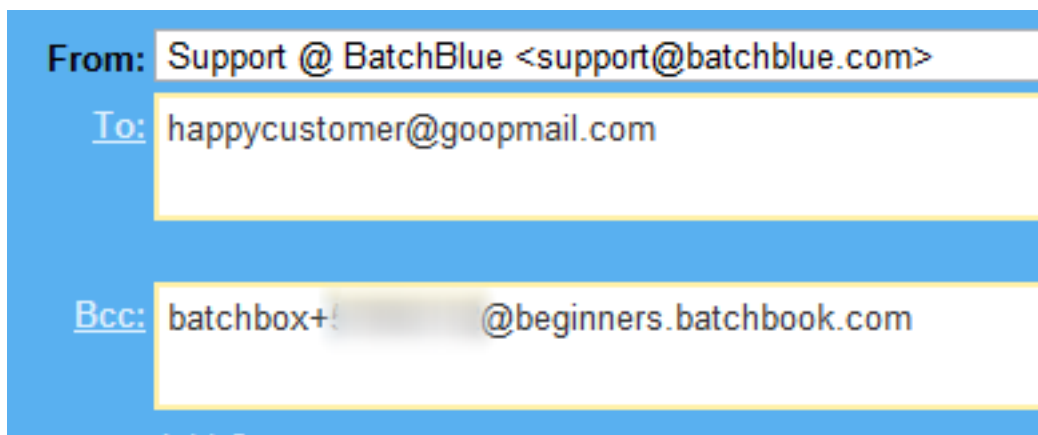
Or get it from 'Your Account'



The screenshot shows the 'Your Account' page with the 'Email Settings' tab selected. Below the tabs are four sub-tabs: User Settings, Email Settings (active), Your Plan, and Manage Users. The main content area is titled 'Reminders' and contains the text: 'If you would like to be notified about an upcoming To-Do item, check the "To-Do Reminders" box and click "Save". An email reminder will automatically be sent letting you know that something's coming due that day.' Below this text is a table with three columns: 'Notification Type', 'To', and 'Save'. The first row has a checkbox next to 'To-Do Reminders', an empty text input field, and a green 'Save' button. Below the table is the 'BatchBox Email Forwarding' section, which contains the text: 'Use the email address below to send emails into BatchBook. You can forward messages to this address or add the address as a "bcc" or as a "cc" to emails, which will automatically add the email to the associated contact record. If the email address doesn't already exist in BatchBook, a new contact record will be automatically created for the email address. Fancy!' and 'You can also create To-Dos by emailing BatchBox (visit the FAQ)'. Below this text is a light blue box containing the email address 'batchbox+@beginners.batchbook.com'.

You can also access your Batchbox address by clicking on 'Your Account' and going to the Email Settings tab. Once you find your Batchbox email address, we suggest adding it right to your contacts list in your email program.

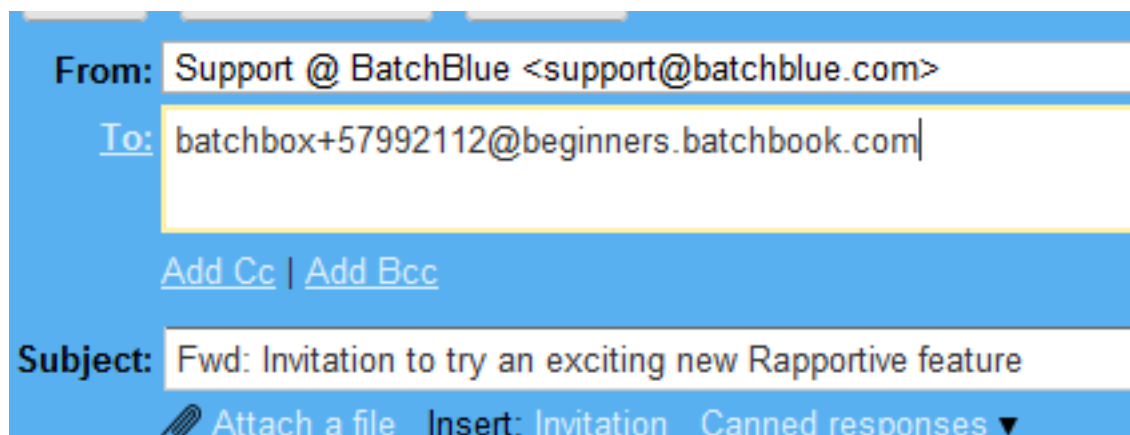
Send a new e-mail To: a contact (or a list of contacts) and Bcc: Batchbox



From: Support @ BatchBlue <support@batchblue.com>
To: happycustomer@goopmail.com
Bcc: batchbox+! @beginners.batchbook.com

This will create an e-mail From: you To: your contact (or contacts) in your Batchbook account. If the contacts don't exist in Batchbook, then we'll create them for you.

Forward an e-mail to Batchbox



From: Support @ BatchBlue <support@batchblue.com>
To: batchbox+57992112@beginners.batchbook.com
[Add Cc](#) | [Add Bcc](#)
Subject: Fwd: Invitation to try an exciting new Rapportive feature
Attach a file Insert: Invitation Canned responses ▼

This will create an e-mail in your Batchbook account, and the To: and From: contacts will be pulled from the header of the forwarded e-mail. If the contacts don't exist in Batchbook, then we'll create them for you.

Using To-Dos to Manage Your Tasks

How do I add, delete, or edit a To-Do List item?

Adding a new To-Do

Dashboard | Contacts | Communications | Calendar | Deals | Lists & Reports | Tags & SuperTags | Sync & Integrations

To-Do List

Search To-Dos: All Due Dates: All Tags: All My To-Dos:

[Do This Thing](#) (Select Shown | De-Select All) **Flag** **Due** **Done?**

<input type="checkbox"/>	Learn how to add a to-do	<input type="checkbox"/>	Apr 20, 2011	<input type="button" value="edit"/>	<input type="button" value="delete"/>	<input type="button" value="done"/>
--------------------------	--	--------------------------	--------------	-------------------------------------	---------------------------------------	-------------------------------------

The Create To-Do button is located on the Dashboard's To-Do List ...

Dashboard | Contacts | Communications | Calendar | Deals | Lists & Reports | Tags & SuperTags | Sync & Integrations

Show: Events To-Dos Communications SuperTag Dates All Items: All Tags:

< February **March 2011** April >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2

... on the Calendar tab ...



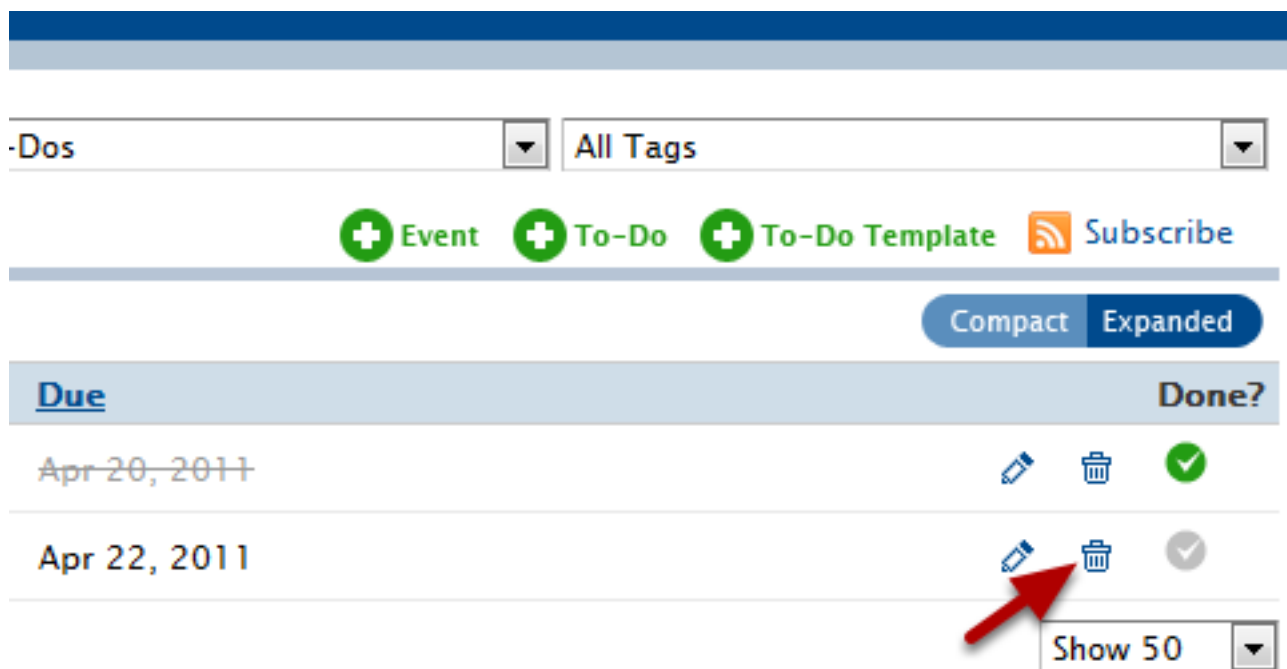
... and on the Quick Add sidebar, which is on almost every Batchbook page.

Marking a To-Do "done"

Do This Thing	Flag	Due	Done?
<input type="checkbox"/> Learn how to add a to-do	🚩	Apr 20, 2011	✔️
<input type="checkbox"/> Check a to-do as done	🚩	Apr 20, 2011	⊖

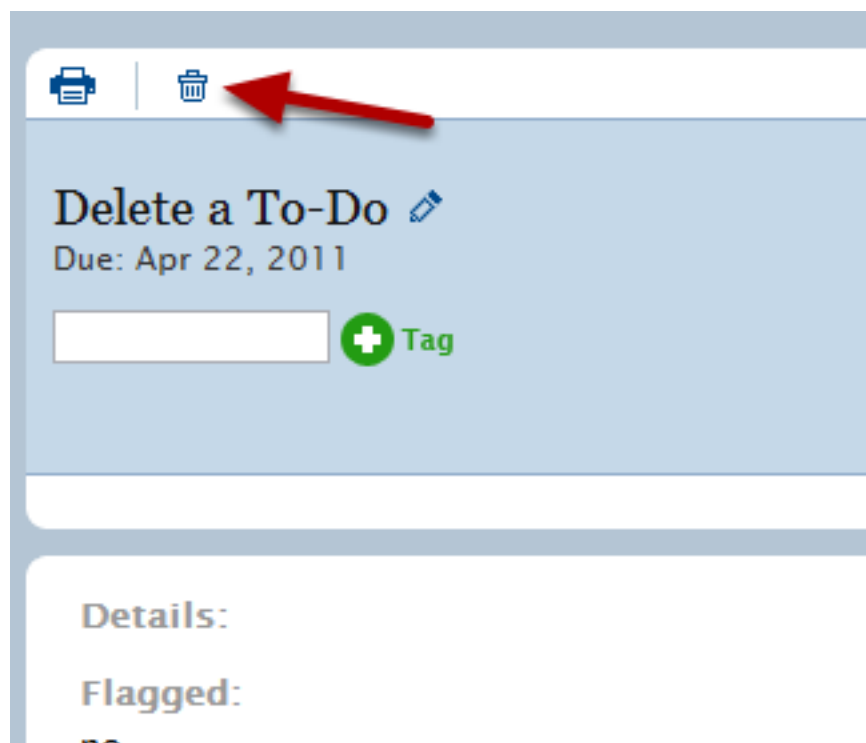
Click the checkmark icon next to the To-Do in the Done column on the Dashboard or Calendar To-Do List views. Pat self on back. To-Dos marked as "Done" are archived into a separate view on your To-Do List, so if you wish to see all of these items, simply select "My Completed To-Dos" from the filter pull-down menu.

Deleting a To-Do



The screenshot shows a web interface for managing To-Do items. At the top, there are filters for '-Dos' and 'All Tags'. Below these are buttons for '+ Event', '+ To-Do', '+ To-Do Template', and 'Subscribe'. A toggle switch is set to 'Compact'. The main table has two columns: 'Due' and 'Done?'. The first row shows a due date of 'Apr 20, 2011' and a 'Done?' status of a green checkmark. The second row shows a due date of 'Apr 22, 2011' and a 'Done?' status of a grey checkmark. A red arrow points to the delete icon (trash can) in the second row. At the bottom right, there is a 'Show 50' dropdown menu.

Click the delete icon in the To-Do List table ...



The screenshot shows the detail page for a To-Do item. At the top, there is a toolbar with a printer icon and a delete icon (trash can). A red arrow points to the delete icon. Below the toolbar, the title is 'Delete a To-Do' with a pencil icon. The due date is 'Due: Apr 22, 2011'. There is a text input field followed by a '+ Tag' button. Below this, there are sections for 'Details:' and 'Flagged:'. The 'Flagged:' section is partially visible at the bottom.


... or on the To-Do detail page ...

Dashboard Contacts Communications **Calendar** Deals Lists & Reports Tags & Super

All Due Dates Due Today Coming Week Coming Month

Calendar List Today **To-Do List**




2 records selected.

Choose a Batch Action... 

Do This Thing (Select Shown | De-Select All)

[Delete a To-Do](#)

[Delete more than one to-do at a time](#)

 To-Do  Print List  To-Do Feed


Select the Batch Action to Delete any items you have checked.

... or use batch actions to delete several To-Dos at once.




Editing a To-Do




To-Do List

Search To-Dos All Due Dates All Tags All My To-Dos

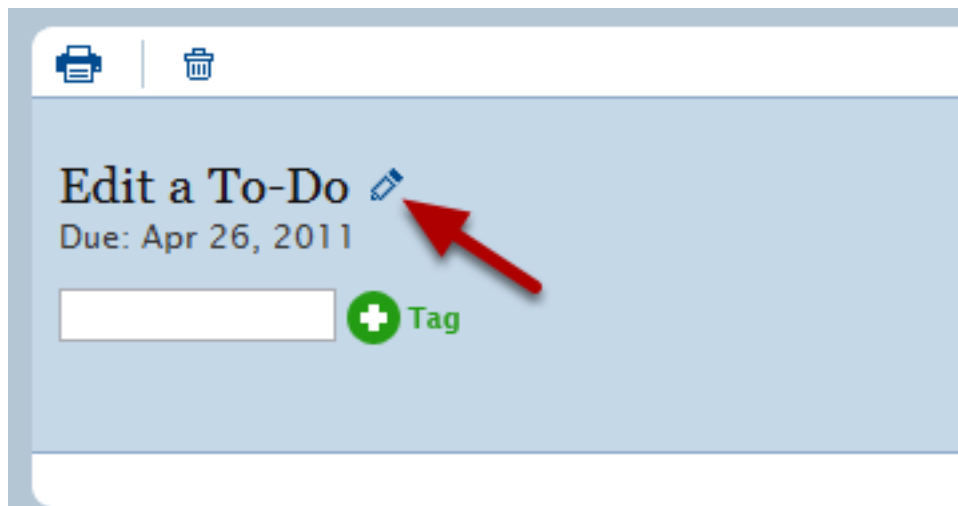
 To-Do Compact Expanded

Do This Thing (Select Shown | De-Select All) **Flag Due** Done?

[Edit a To-Do](#) Apr 26, 2011   

 To-Do  Print List  To-Do Feed Show 50

Click on the edit pencil from a To-Do list ...

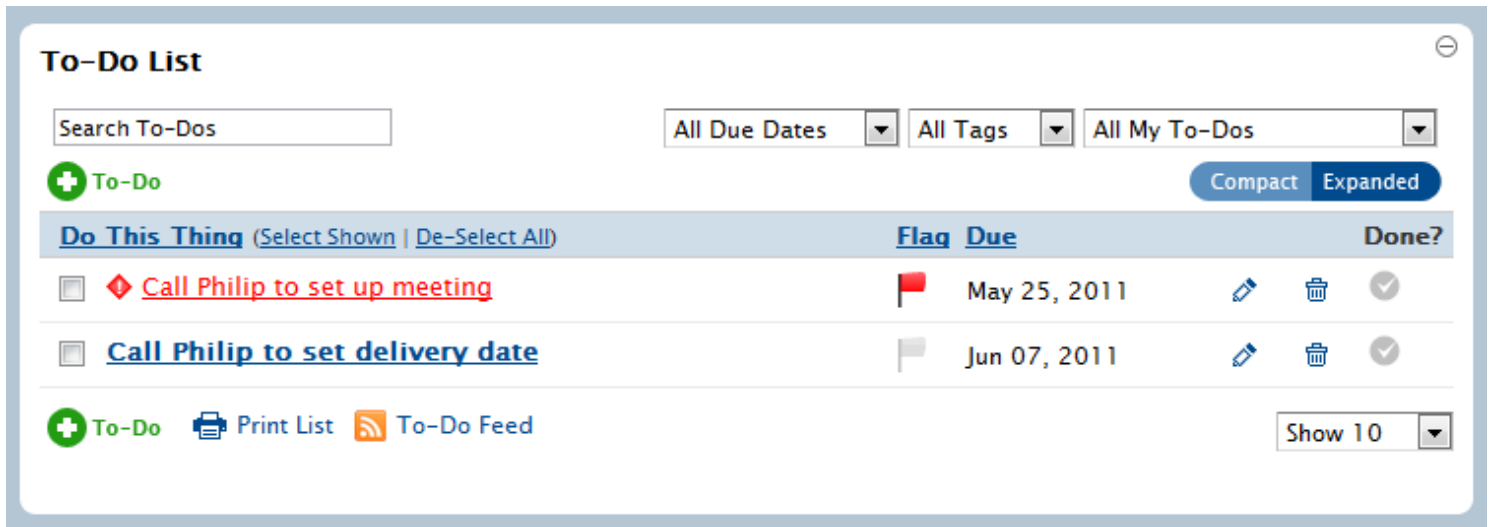


... or click the pencil next to the name of the To-Do when you have it open.

NOTE: If you would like a To-Do to be attached to a particular contact or communication, go to that record's detail page. Choose Create a To-Do from the Quick Add drop-down menu and complete the in-line form that loads. For Deals, choose Add in the Related To-Dos and Events box. The To-Do will automatically be attached to that record.

View and Complete your To-Do List

Use the Dashboard Widget



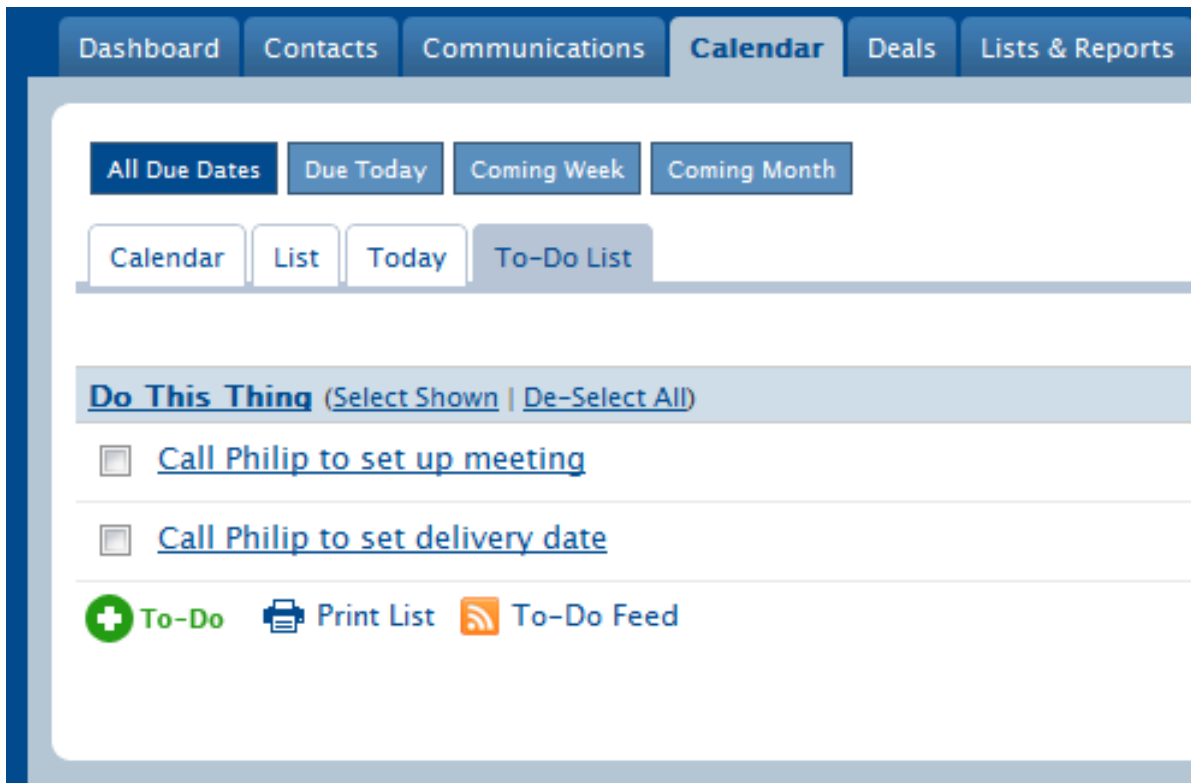
The screenshot shows a 'To-Do List' widget on a dashboard. At the top, there is a search box labeled 'Search To-Dos' and three filter dropdowns: 'All Due Dates', 'All Tags', and 'All My To-Dos'. Below these are two buttons: 'Compact' and 'Expanded'. The main area contains a table with the following structure:

Do This Thing (Select Shown De-Select All)		Flag	Due	Done?		
<input type="checkbox"/>	Call Philip to set up meeting		May 25, 2011			<input checked="" type="checkbox"/>
<input type="checkbox"/>	Call Philip to set delivery date		Jun 07, 2011			<input checked="" type="checkbox"/>

At the bottom of the widget, there are icons for '+ To-Do', 'Print List', and 'To-Do Feed', along with a 'Show 10' dropdown menu.

You can view all of your to-dos on your Dashboard. Just enable the To-Do List widget and you are good to go!

View Your To-Do List on the Calendar Tab



The screenshot shows the 'Calendar' tab selected in a navigation bar. Below the navigation bar, there are four filter buttons: 'All Due Dates', 'Due Today', 'Coming Week', and 'Coming Month'. Underneath these are four sub-tab buttons: 'Calendar', 'List', 'Today', and 'To-Do List'. The main content area displays a table with the following structure:









Do This Thing (Select Shown De-Select All)	
<input type="checkbox"/>	Call Philip to set up meeting
<input type="checkbox"/>	Call Philip to set delivery date


At the bottom, there are icons for '+ To-Do', 'Print List', and 'To-Do Feed'.

You can access your to-do list from your Calendar tab. Click on the sub-tab for your To-Do List.

Hint: You can also quickly get to your to-do list by using the shortcut key 't'.

Mark Your To-Do as Done

		Compact	Expanded	
<u>Flag</u>	<u>Due</u>	<u>Done?</u>		
	May 25, 2011			 
	Jun 07, 2011			

Show 10 

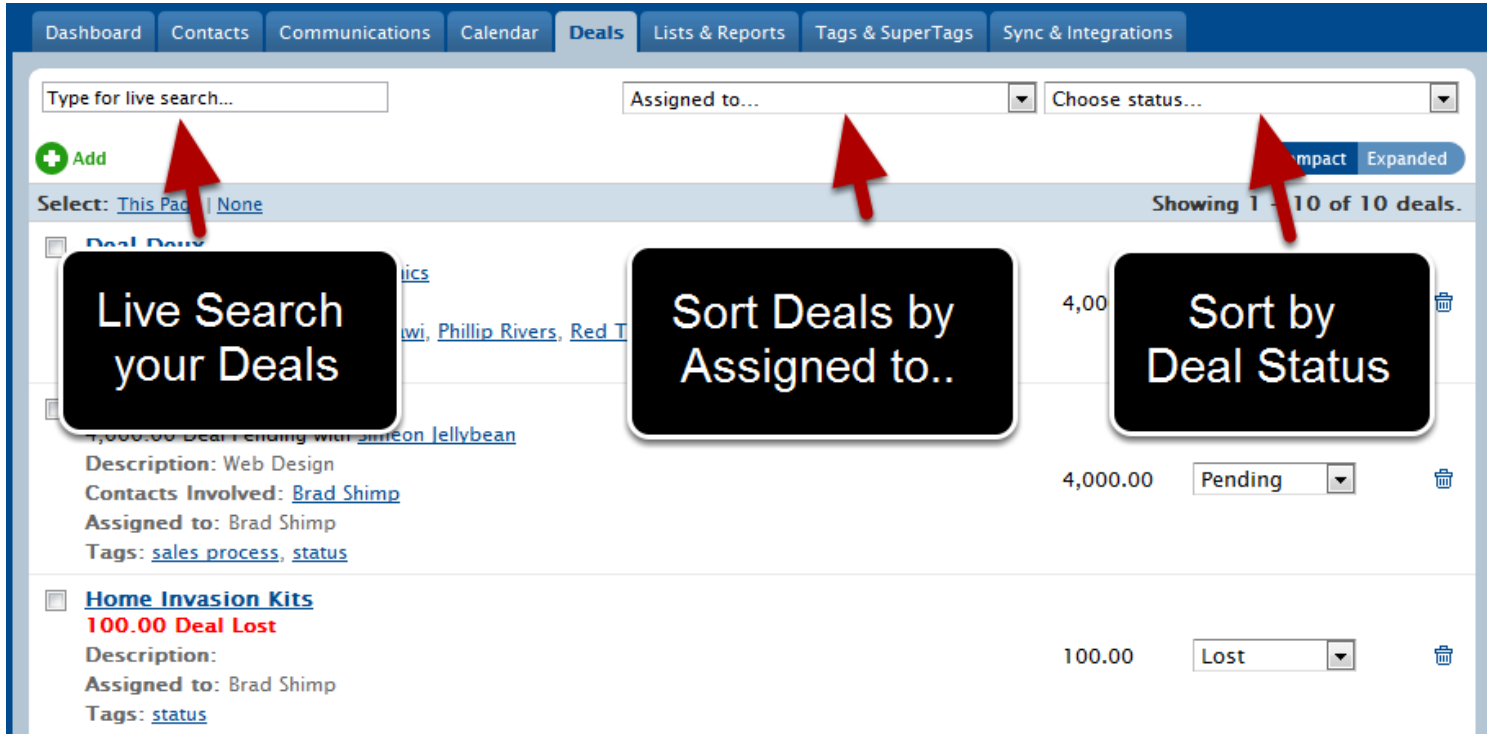
Done with your task? Just mark it as done!

Using Deals

What's the Deals Tab?

The Deals tab is where you can live-search your Deals, set viewing filters, and perform batch actions (reassign, tag or SuperTag, update status, or delete) on multiple Deals at once.

Live Search or Filter from the Deals Tab



The screenshot shows the 'Deals' tab interface. At the top, there are navigation tabs: Dashboard, Contacts, Communications, Calendar, Deals (selected), Lists & Reports, Tags & SuperTags, and Sync & Integrations. Below the navigation, there is a search bar labeled 'Type for live search...' and two dropdown menus: 'Assigned to...' and 'Choose status...'. A green '+ Add' button is on the left. Below the search and filter options, there are buttons for 'Compact' and 'Expanded' views. The main area displays a list of deals. Two callout boxes with white text on a black background are overlaid on the interface: 'Live Search your Deals' points to the search bar, 'Sort Deals by Assigned to..' points to the 'Assigned to...' dropdown, and 'Sort by Deal Status' points to the 'Choose status...' dropdown. The deal list shows two items: 'Deal ending with gineon jellybean' with a value of 4,000.00 and status 'Pending', and 'Home Invasion Kits' with a value of 100.00 and status 'Lost'. Each deal entry includes a description, contacts involved, assigned to, and tags.

Like the Contacts tab, the Deals tab allows you to filter which Deals you show (by assigned to or status) and to do a quick live search of all of your deals.

Perform Batch Actions on Your Deals

The screenshot shows a CRM interface with a yellow header bar indicating "1 record selected." Below this, a dropdown menu is open, listing various batch actions. The menu items are: "Choose a Batch Action..." (highlighted), "Delete Selected Items", "Tag or SuperTag Selected Items", "Un-Tag Selected Items", "Add Permissions for Selected Items", "Remove Permissions for Selected Items", "Reassign", and "Update Status". To the right of the menu is a red "Cancel" button. Below the menu, two deal entries are visible, each with a checked checkbox. The first deal is "Green Dynamics Web Site" with a value of 4,000.00, description "Web Design", assigned to Brad Shimp, and tags "sales process" and "status". The second deal is "Home Invasion Kits" with a value of 100.00 (labeled "Deal Lost"), description "Home Invasion Kits", assigned to Brad Shimp, and tag "status".

1 record selected.

Choose a Batch Action... ✖ Cancel





Choose a Batch Action...


Green Dynamics Web Site
4,000.00 Deal Pending with [Simeon Jellybean](#)
Description: Web Design
Contacts Involved: [Brad Shimp](#)
Assigned to: Brad Shimp
Tags: [sales process](#), [status](#)

Home Invasion Kits
100.00 Deal Lost
Description:
Assigned to: Brad Shimp
Tags: [status](#)

You can select multiple deals on the Deals tab and perform batch actions on them, such as changing permissions, deleting deals, and tagging.

Manage Your Deal Statuses

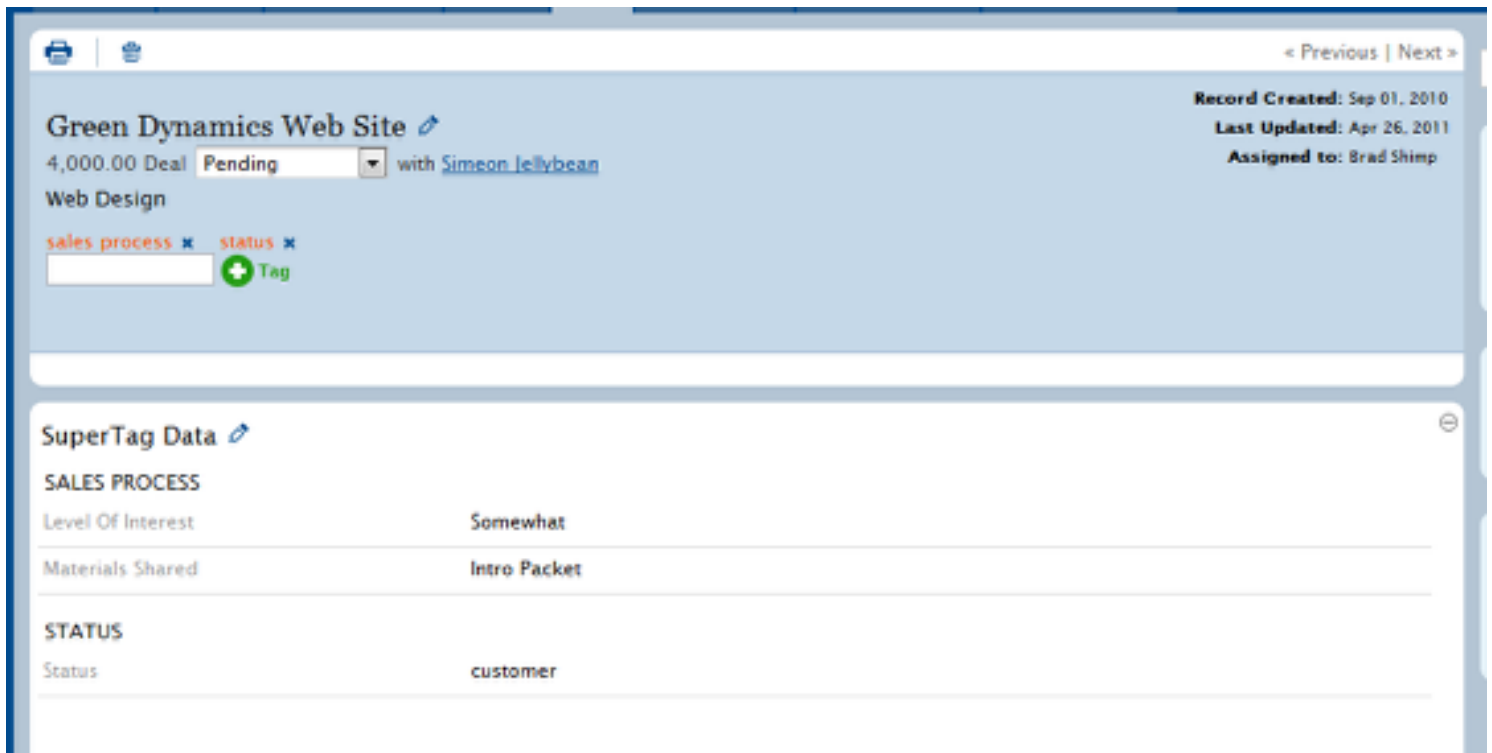
Manage Deal Statuses			
Name	Total Deals	Deal Totals	Delete Status
Lost	2	140.00	
Old	0		
Pending	5	16,010.00	
Won	1	9,000.00	

 Add

On the Deals tab, you can monitor your Deal Statuses, as well as Add new Statuses or delete current Statuses.

What is a Deal?

A Deal is a type of record



The screenshot shows a CRM interface for a deal record. At the top, there are navigation links for '< Previous' and 'Next >'. The main header displays the deal title 'Green Dynamics Web Site' with an edit icon, the amount '4,000.00 Deal', a status dropdown menu set to 'Pending', and the contact name 'with Simeon Jellybean'. Below this, the deal description 'Web Design' is visible. There are two tags: 'sales process' and 'status', each with a close icon. A 'Tag' button with a plus sign is also present. On the right side, there is a summary box with the following information: 'Record Created: Sep 01, 2010', 'Last Updated: Apr 26, 2011', and 'Assigned to: Brad Shimp'. Below the deal header, there is a 'SuperTag Data' section with a table of data:

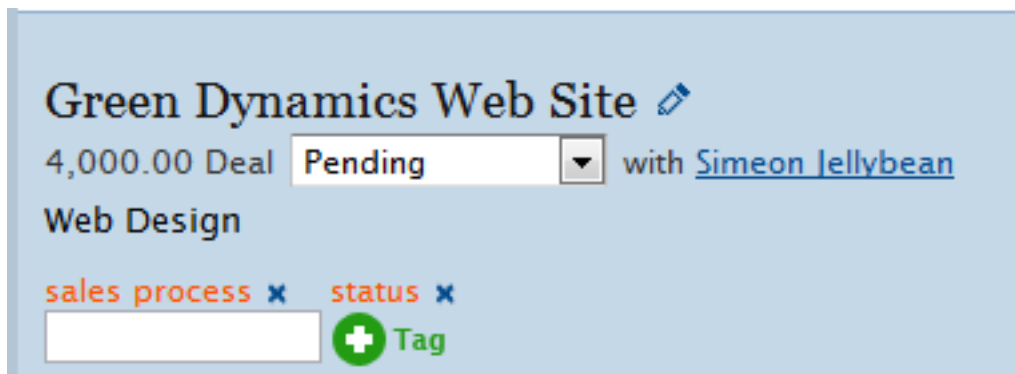
SALES PROCESS	
Level Of Interest	Somewhat
Materials Shared	Intro Packet

STATUS	
Status	customer

You can use Deals to store information that you want to keep separate from your Contact data. Deals are great for tracking multiple sales with a contact or for managing projects.

Deals can be searched, assigned to a Batchbook user, and included on reports and export files.

A deal can be assigned to a specific contact



This is a close-up view of the deal header from the screenshot above. It shows the title 'Green Dynamics Web Site' with an edit icon, the amount '4,000.00 Deal', the status dropdown menu set to 'Pending', and the contact name 'with Simeon Jellybean'. Below this, the deal description 'Web Design' is visible. There are two tags: 'sales process' and 'status', each with a close icon. A 'Tag' button with a plus sign is also present.

Each deal can be with a specific contact in Batchbook. The deal will be linked from that contact's detail page, and you will see who the deal is with from the deal detail page.

Deals also have some useful default fields. You can record the amount of the deal or its status. You can also add a description to a deal, along with tags and SuperTags.

Deals can have associated contacts



You can associate multiple contacts with a deal if they are involved in it. This is especially helpful when you bring together a team to work on a project or when you have multiple contacts for a sale. It is also useful when multiple people from different companies are all working on one deal.



Deals can have SuperTags, Communications, Comments, and can be used with Permissions


SuperTag Data

SALES



Stage	Written Agreement
Deliver Date	May 05, 2011
Steps	Received Signed Contract Received Artwork Sent Job Sheet and Artwork to Printer

Related Communications

 no subject <small>Note</small>	03/31/2011
 Test Call Phone from Brad Shimp to Green Dynamics	01/22/2011

 Add

Comments

 Add  Comments Feed

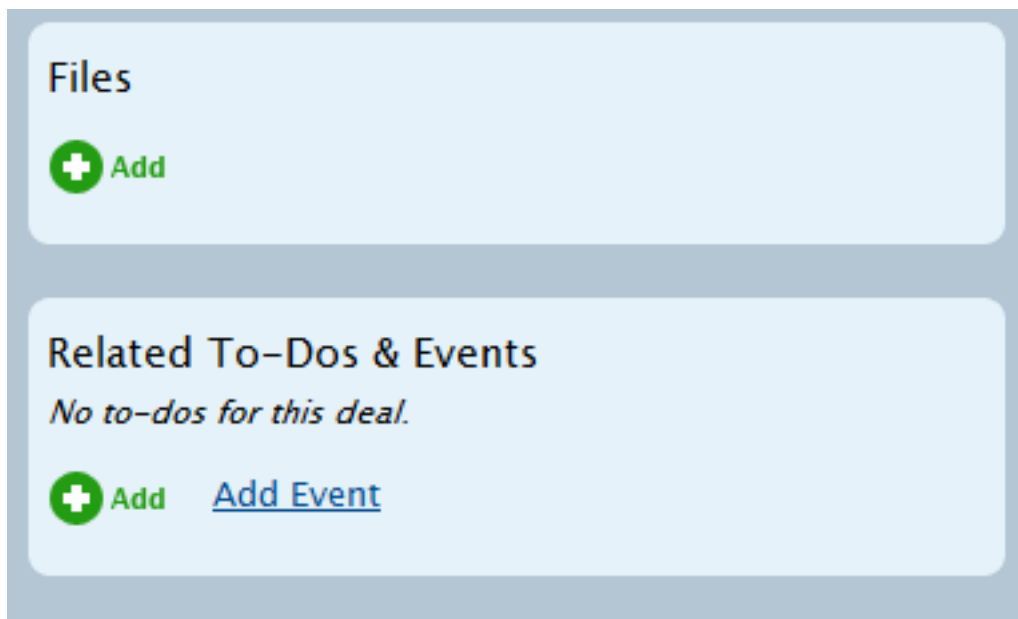
Permissions

Choose below who can see this record:

All Basic Users on Account Joe Nobody Fay Durham Richard Middleton

SuperTags make deals fully customizable to your unique needs. As with contacts, you can also track communications, add To-Dos and Events that are related to a deal, make comments on a deal, or assign permissions (if you have multiple users and some of them are Basic users).

You can add Files, To-Dos, and Events to Deals



Look for these boxes in the right-hand column to attach files to a deal or to add related To-Dos and Events.

Using Our Resources to Get More Information

Webinars give in depth info on using Batchbook

Batchbook Webinars

Sign up for a live training session or view our archived webinars below.

Upcoming Webinars

Join us! All webinar training sessions include a live product demo and Q&A so you can have your specific questions answered.

Harnessing the Super Power of SuperTags

Learn how to make the most out of your Batchbook account with the incredible customization power of SuperTags!

Thu, May 26, 2011 2:00 PM - 3:00 PM EST

[Register here](#)

















Stephanie (and Yoko) say
happy organizing!

Take part in a live webinar, or view a recorded session. Check out our webinars by visiting <http://batchblue.com/webinars/>

We have a bunch of short videos that highlight specific Batchbook features

Batchbook Screencasts

Seeing is believing! Watch a helpful screencast to see Batchbook in action.

-  Manage your contacts and social network
-  Social media integration with the Social Media SuperTag
-  Import contacts and custom data into Batchbook
-  Track your communications and to-dos
-  Customize your data with SuperTags
-  Send emails and to-dos to Batchbook with BatchBox
-  Creating web forms in Batchbook
-  Batchbook for Sales: Managing Deals
-  Building Lists and Reports
-  View and track your FreshBooks invoices in Batchbook
-  Send email newsletters to your Batchbook contacts with MailChimp
-  Integrate your Google Contacts with Batchbook
-  View Social Media in Email with Rapportive
-  Schedule Meetings in Batchbook Using Tungle

[Or view our Upcoming and Recorded Webinars](#)

See how our features and integrations work by watching our short screencasts. These are available at <http://batchblue.com/screencasts.html> or by clicking on the 'Support' link at the top right inside Batchbook.

We have answers to a lot of questions



Frequently Asked Questions

Here's where you'll find answers to common questions about BatchBook.

Need to know more about how something works in Batchbook? Check out our FAQs, which are available at support.batchbook.com/kb or by clicking the Support link at the top right in Batchbook.

Email Support

Email us any time



Email Support

Still have questions? Write to us at
support@batchblue.com.

When you're stuck, just email us at Support@batchblue.com. We provide all of our support via email and will get back to you quickly.