

New Contact Management Complete. Not Complex.

Getting Started Guide

Welcome to the new Contact Management. The login process has changed from classic Contact Management to the new. This guide will walk you through those changes and help you begin using the new Contact Management.



All of the following steps in the Getting Started Guide should be completed to finalize the transition to new Contact Management:

- What web browsers to use.
- Accessing new Contact Management.
- Logging in for the first time.
- Changing your password.
- Setting security questions.
- Completing the required interactive “Learn It Now!” training modules.
- Check My Settings on my device
- Updating your user profile.
- Viewing your new Contact Management email address.
- Setting up your signature block.
- Accessing the Interactive Training Tutorials.

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Web Browsers and Accessing the New Website

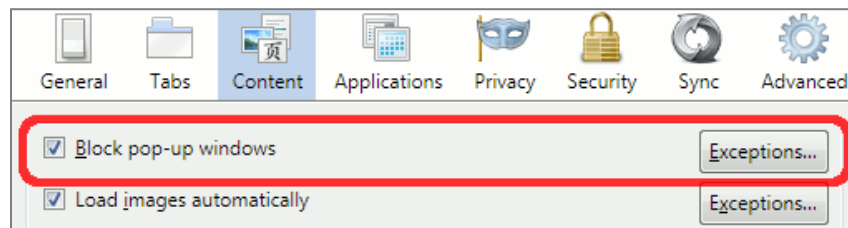
New Contact Management is designed to work with any modern, HTML 5 compatible web browser. This includes Google Chrome, Firefox, Safari, and Internet Explorer 10 or greater.

1. Make sure your computer or device has a compatible web browser. If you have a compatible browser already, skip to step 2.
 - a. If the device you will be accessing new Contact Management from does not have a compatible browser, type in one of these URLs to download one:
 - i. Google Chrome: <https://www.google.com/intl/en/chrome/browser/?brand=CHMO>.
 - ii. Firefox: <http://www.mozilla.org/en-US/firefox/all/>.
 - iii. Safari: <http://support.apple.com/downloads/#safari>.
 - iv. Internet Explorer: <http://windows.microsoft.com/en-us/internet-explorer/download-ie>.
 - b. Complete the following instructions that match your browser to allow pop-ups and experience new Contact Management as it was designed.
 - i. Google Chrome  users:
 1. Click the Menu icon  on the top right corner of the browser toolbar.
 2. Select "Settings."
 3. Click the "Show advanced settings..." link at the bottom of the screen.
 4. In the "Privacy" section, click the "Content settings..." button.
 5. Scroll down to the "Pop-ups" section and click "Manage exceptions..."
 6. Select the text box and type **[*.]dealer.reyrey.net** and click "Done."

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ii. Firefox users:

1. At the top of the Firefox window, click the Menu icon  and then select the Options Menu  Options
2. Select the “Content” panel option.



3. Uncheck “Block pop-up windows” to disable the pop-up blocker altogether.
4. Click “Exceptions...” to enable pop-ups for the new Contact Management site only.
5. In the “Address of web site:” textbox, type **dealer.reyrey.net**.
6. Click “Allow.”

iii. Safari users:

1. Skip to step 2.



iv. Internet Explorer 9 or greater users:

1. Click the “Tools” option from those displayed along the top left corner of the screen.
2. Point to “Pop-up Blocker” in the drop-down menu.
3. Click “Pop-up Blocker Settings.”
4. In the “Address of website to allow:” textbox, type **dealer.reyrey.net**.
5. Click “Add.”
6. Click “Close.”

- c. If the device you will be accessing new Contact Management from does not have Adobe Acrobat, type in the URL below to download it:

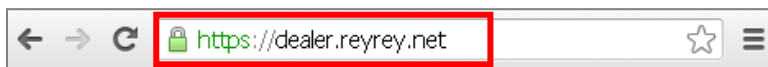
- i. <http://get.adobe.com/reader/>

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- d. Complete the following instructions that match your browser to allow Adobe Reader to be your browser's default PDF viewer.
- i. Google Chrome  users:
 - 1. In the Chrome address bar, type `chrome://plugins`
 - 2. Disable Chrome PDF Viewer.
 - 3. Enable the Adobe Acrobat/ Adobe Reader plugin.
 - ii. Firefox  users:
 - 1. At the top of the Firefox window, click on the Firefox button and then select Options
 - 2. Select the Applications panel.
 - 3. Find Portable Document Format (PDF) in the list and click on it to select it.
 - 4. Click on the drop-down arrow in the Action column for the above entry and select the PDF viewer you wish to use.
2. Double-click the compatible web browser icon on your device.



3. Type **`https://dealer.reyrey.net`** in the browser's address bar, and press "Enter" to access the new Contact Management website.



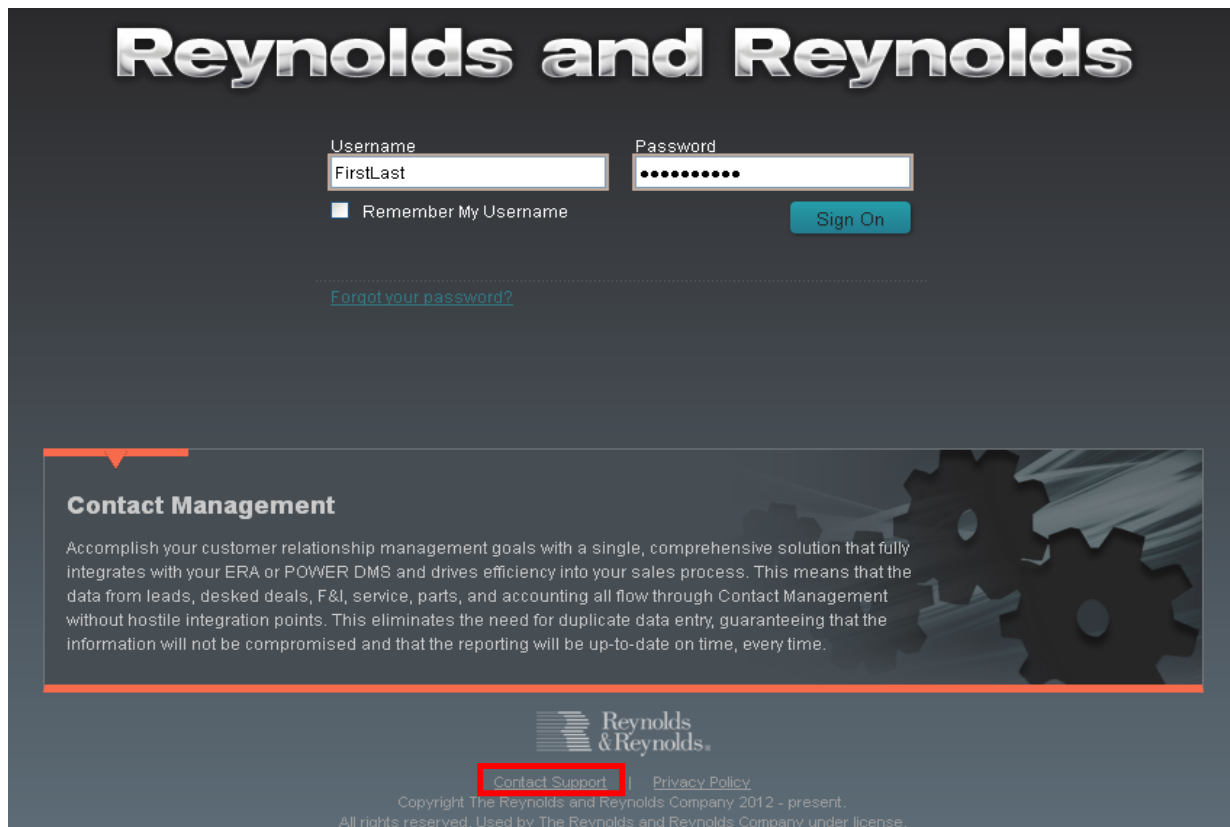
4. Please contact your IT professional if you require assistance with any of the above instructions.

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Logging into New Contact Management

1. Type in the new username and password you received, and click the blue “Sign On” button.

*Note: The password **is** case sensitive.*

The image shows the login interface for Reynolds and Reynolds' New Contact Management system. At the top, the company name "Reynolds and Reynolds" is displayed in a large, bold, white font. Below the name are two input fields: "Username" with the placeholder text "FirstLast" and "Password" with masked characters. A "Remember My Username" checkbox is located below the username field. A blue "Sign On" button is positioned to the right of the password field. Below the login fields is a link that says "Forgot your password?". A horizontal line separates the login section from a "Contact Management" section below. This section contains a paragraph of text describing the system's capabilities. At the bottom of the page, there is a footer with the Reynolds & Reynolds logo, a red-bordered link for "Contact Support", a link for "Privacy Policy", and copyright information: "Copyright The Reynolds and Reynolds Company 2012 - present. All rights reserved. Used by The Reynolds and Reynolds Company under license."

Tip: The Contact Support link at the bottom of the screen can be clicked to display our support contact information if you experience difficulties logging in.

2. Once logged in, you will see the Security Settings screen. This screen will only need to be completed the first time a user logs in.

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3. Type the same temporary password used on the login screen in the “Current Password” field. Select a new password that is at least 7 characters long and contains 2 of the following 3 character types: letters, numbers, and symbols. Type the new password into the 2 corresponding fields.

Security Settings

Change Password

Current Password
.....

New Password
.....

Confirm New Password
.....

4. Select one security question from each of the three drop down menus, and type each answer in the corresponding “Security Answer” textbox. These questions will be used to recover your password if you select the “Forgot your password?” link on the login screen.

Change Security Questions

Security Question 1
On what street did you grow up? ▼

Security Answer 1
Type first answer here

Security Question 2
What was your first pet's name? ▼

Security Answer 2
Type second answer here

Security Question 3
Custom Question ▼

Question
Type custom question

Security Answer 3
Type third answer here

Note: If you select the “Custom Question” option, a new text field will appear for you to type in the question.

5. Once you have completed the screen, click the blue “Save” button  to proceed.

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Completing the required interactive “Learn It Now!” training modules

1. You will be required to complete 5 “Learn It Now” training modules when before you can proceed to accessing Contact Management.
2. Click on the module to complete the training.

WELCOME | INITIAL TRAINING

Training

Welcome to Customer!

We want you to have the best user experience possible, so please take a few minutes to learn about the features designed to help you hit the ground running.

Take a Tour!
We'll help you start learning your new Contact Management system!

Activity
How do I complete an activity?

Add Client
How do I add a new customer to the system?

Add Prospect
How can I view or add prospect records to an existing client record?

Daily Work Plan
How do I know what activities I need to complete today?

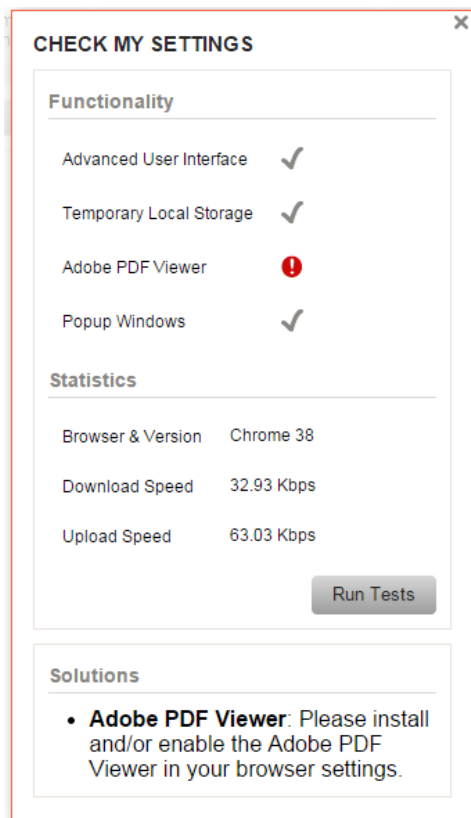
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Check My Settings

1. You can access the “Check My Settings” feature by clicking the “Help” link at the top right of the screen to access the Help menu options. This will ensure that your device is optimized for Contact Management.



2. Click the “Check My Settings” box. System tests will automatically be run and results related to those tests will be displayed for you.



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Updating Your User Profile and Setting Your Signature Block

1. Click the “My Profile” link in the top right corner of the screen to open the My Profile window, which contains the specific user’s profile information.



2. The Profile Information tab will appear, displaying the user's current entered information. Cell and work phone numbers can be added here as well as an external email address. An external email address should be entered since that is used if you forget your password.

First First	Middle	Last Last
Cell	Work	Email external@email.com
Department(s)	Published Job Title Sales Consultant	Language English - United States

3. Complete the desired fields and click the “Save” button  to proceed.
4. Click the “Shared Settings” tab.

Profile Information	General Options	Shared Settings	Customer
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5. Click the gray accordion labeled “Basic” to expand the section and view the user’s new Contact Management email address, displayed below the “CM Email Name” field.

▼ Basic

Note: You may want to use your new Contact Management email address when creating your signature blocks.

- ▼ Signature Blocks

▲ Signature Blocks

Email Signature

SourceFont▼Size▼B I U


First Last
Sales Consultant
Open Road Motors
(123) 456-7890
FirstLast@openroadsmtrs.cmdlr.com

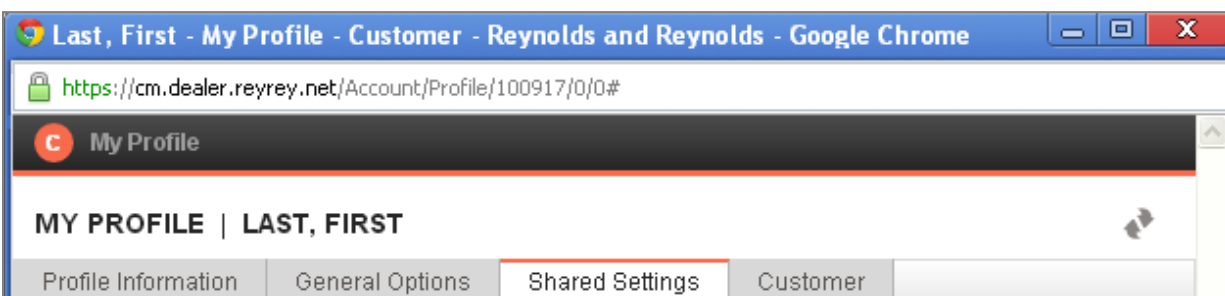
Letter Signature

SourceFont▼Size▼B I U

First Last
Sales Consultant
Open Road Motors
123 Road Way
Test, ST 12345
(123) 456-7890

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7. Once your signatures are complete click the “Save” button  at the bottom right of the screen.
8. Click the red “X” on the top right corner of the My Profile window to close the window and proceed.



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Accessing the Interactive Training Tutorials

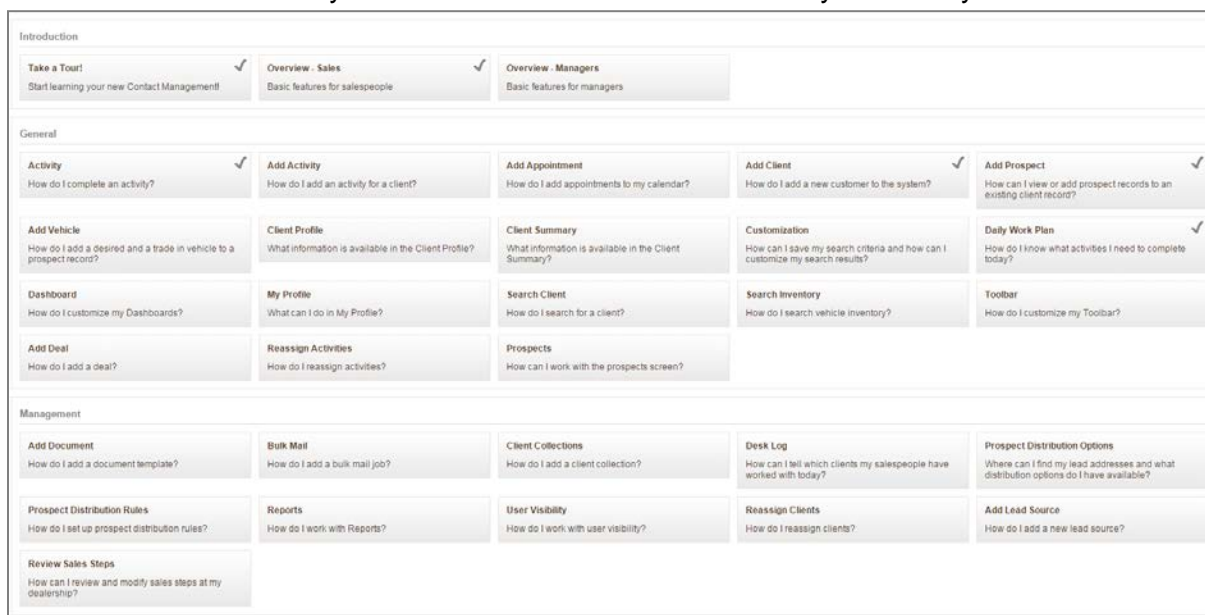
3. You can access additional “Learn it Now” modules by clicking the “Help” link at the top right of the screen to access the Help menu options.



4. Click the “Learn It Now!” box.



5. Select each Learn It from the menu of options for a 5-15 minute interactive tutorial on specific subjects. The Learn It tutorials are always available and can be taken as many times as you like.



R E Y N O L D S A N D R E Y N O L D S

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www.reyrey.com/newcm