



About Miller Heiman Group

Miller Heiman Group is the global leader in providing organizations the sales methodology plus technology to drive revenue. The organization consults with successful brands, both large and small, to implement training, technology and coaching that drastically changes business outcomes. Through a combination of system innovation, unique industry research, and proven learning approaches, Miller Heiman Group is future-proofing clients through the next wave of sales disruption. For more information, visit www.millerheimangroup.com.

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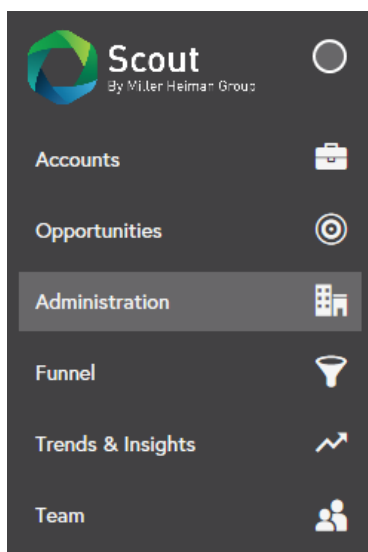
Contents

Overview	1	Account Management	37
		Create an Account	37
Organization Setup	4	View Accounts and Associated Opportunities	39
Organization Details	5	Search/Filter/Sort	40
Editing the Fiscal Year	7	Basic Search	41
<i>Large Account Management Process</i> SM (LAMP®): Gold Sheet	7	Filter	41
CRM Mapping	9	Sort	41
Custom Funnel Stage	14	Edit an Account	42
Customize or Edit Sales Stage		Change an Account Owner	43
Names and Probability	15		
Select Report Mapping	15	Opportunity Management	44
Add a New Sales Stage	16	Create an Opportunity or Blue Sheet	44
Scorecard Templates	17	View Opportunities	45
Scorecard Name	18	Filters/Sort and Search	46
Section	18	Basic Search	46
Title	18	Team Filter	46
Criteria Definition	19	Sales Stage Filters	47
Point Value	19	“Show” Filters	48
Custom Fields	19	Sort By	48
		Saving a Filter in the Opportunity	
User Management	22	List or Funnel	49
Basic Sequence	22	Pagination	50
Scout Roles	22	Filter for Opportunities in the Funnel	50
Sales Representative Role Description		Edit an Opportunity	51
and Permissions	23	Delete an Opportunity	51
Global Collaborator Role and Permissions	25	Change an Opportunity Owner	52
Team Collaborator Role and Permissions	25	Change the Account to Which an	
Global Viewer/Editor Role and Permissions	26	Opportunity Is Assigned	53
Customer Administrator Role and		Export Opportunity Data	53
Permissions	27	Export Funnel Data	54
Create a New User	29		
Edit/View User Profile Details	33	Rules	55
Disable/Enable User Account	34		
Export User List	35	Roles	56
Export Performance Stats	36		



Overview

As a Scout customer administrator, you have access to areas in the Scout application that are dedicated to administering the application. These functions are accessed from the left-hand menu in Scout, via the “Administration” menu.



The functions include:

Organization Details	The first tab in the “Administration” section of Scout is “Organization Details.” The “Organization Details” tab allows customer administrators (CA’s) to view the organization details that the Miller Heiman Group administrator has used to create your customer organization.
Users	CA’s are responsible for creating users in Scout. Each username, email, and password configuration must be established by the organization’s CA.
CRM Mapping	The “CRM Mapping” tab is used for CRM integration within Scout.
Custom Funnel Stage	CA’s can create custom Funnel stages in Scout.

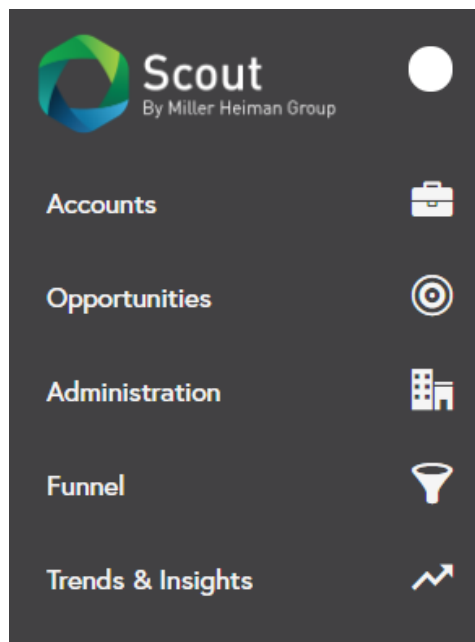
Scorecard Templates	CA's can create custom scorecards for their organization to use in Scout.
Rules	Rules are initially set up by the Miller Heiman Group administrator for each organization. There is a basic set of rules available in Scout, which are the mechanism for sending specific prompts and alerts to users. CA's can customize or create new rules in Scout.
Roles	CA's can create new Roles, or edit existing Roles, in Scout. Details for the creation and editing of Roles are covered in the Scout Roles Administrator Guide.
Custom Fields	CA's have the ability to create custom fields on the Blue Sheet header and in the Single Sales Objective card of the Blue Sheet.

Customer administrators also have access to most of the main functional areas of the application.

Accounts 	CA's have the ability to create and edit accounts. They also have the ability to edit or disable/enable accounts they do not own.
Opportunities 	CA's have the ability to create and edit opportunities. They also have the ability to edit and view opportunities they do not own.
Funnel 	CA's can view the Funnel for the entire organization. All filter functions are available.
Trends & Insights 	CA's can view all "Trends & Insights" reports for an organization.

CUSTOMER ADMINISTRATOR USER GUIDE

All of these functions are available via the left-hand navigation menu in Scout:

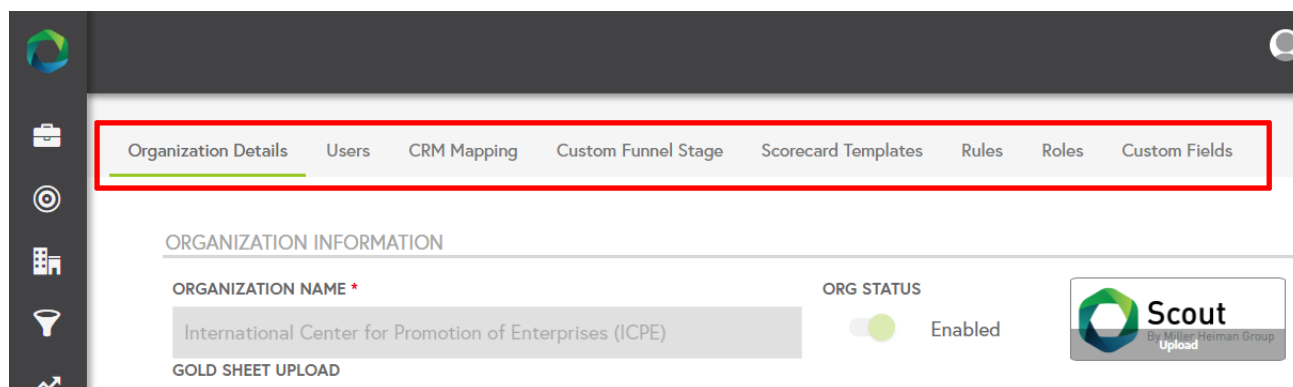


Organization Setup

Before adding users to an organization, you will need to review the organizational setup in Scout. Organizational setup includes:

- Organization Details
- CRM Mapping
- Custom Funnel Stage
- Scorecard Templates
- Custom Fields

These options are visible in the “Administration” menu in Scout, in persistent tabs along the top of the page. The other tabs—“Users,” “Rules,” and “Roles”—will be covered later in this document and in additional guides.



Organization Details

Many of the organization details are entered by the Miller Heiman Group administrator when your organization is created in Scout.

The Miller Heiman Group administrator will be working with your organization at the start of your implementation in order to enter the information.

Customer administrators have the ability to update key information in the “Organization Details” tab:

- “Organization Information” section
 - Preferred Language (default language is displayed)
 - Currency
 - Industry
 - Fiscal Year Start Date
- “Organization Contacts” section
 - Customer Admin
 - CRM Admin
 - Sponsor Contact
- Password complexity criteria

CUSTOMER ADMINISTRATOR USER GUIDE

Review the details in this section; if any information needs to be updated, please contact scout.support@millerheimangroup.com.

Organization Information * Editable by customer administrator	• Organization name • Contract start and end dates • Language preference* (English only in 2018) • Currency (all currencies will be converted to this currency equivalent in Scout) • Industry* • Fiscal calendar year* (fiscal calendar year is editable by the customer administrator; please see the editing instructions that follow this table)
Organization Contacts * Editable by customer administrator	• CRM admin* (required if Scout is integrated with CRM) • Customer admin* (contact information) • Direct seller (the sales representative from Miller Heiman Group for your organization) • Sales consultant (the Miller Heiman Group consultant working with your organization) • Sponsor contact* (the sales leader from your organization who is the primary sponsor for Scout)
Password Complexity* * Editable by customer administrator	Work with your Miller Heiman Group administrator to determine the level of password complexity required for your organization. This will determine the complexity of all passwords used to log in to Scout. • Minimum number of upper case characters • Minimum number of alpha and numeric characters • Minimum number of special characters • Minimum password length • Password expiration days

Editing the Fiscal Year

Fiscal year information may be edited using the drop-down selectors in the “Fiscal Year Start Date” portion of the “Organization Details” page.

Simply click on the drop-downs to select the desired month and day, and then click “Save.” This fiscal year will determine the “current year” dates for any filters used in Scout.

The screenshot shows the Scout Customer Administrator interface. The top navigation bar includes 'Organization Details', 'Users', 'CRM Mapping', 'Custom Funnel Stage', 'Scorecard Templates', 'Rules', 'Roles', and 'Custom Fields'. The 'Organization Details' page is active, displaying 'ORGANIZATION INFORMATION'. The 'ORGANIZATION NAME' is 'Feb QA Test2'. The 'ORG STATUS' is 'Enabled'. The 'Scout' logo is visible. The 'CONTRACT START DATE' is '02/15/2019' and the 'CONTRACT END DATE' is '03/31/2019'. The 'PREFERRED LANGUAGE' is 'English' and the 'CURRENCY' is 'United States Dollar'. The 'INDUSTRY' is 'Finance'. The 'FISCAL YEAR START DATE' is highlighted with a red box, showing a dropdown for 'January' and a dropdown for '1'. The 'ORGANIZATION TYPE' is also visible.

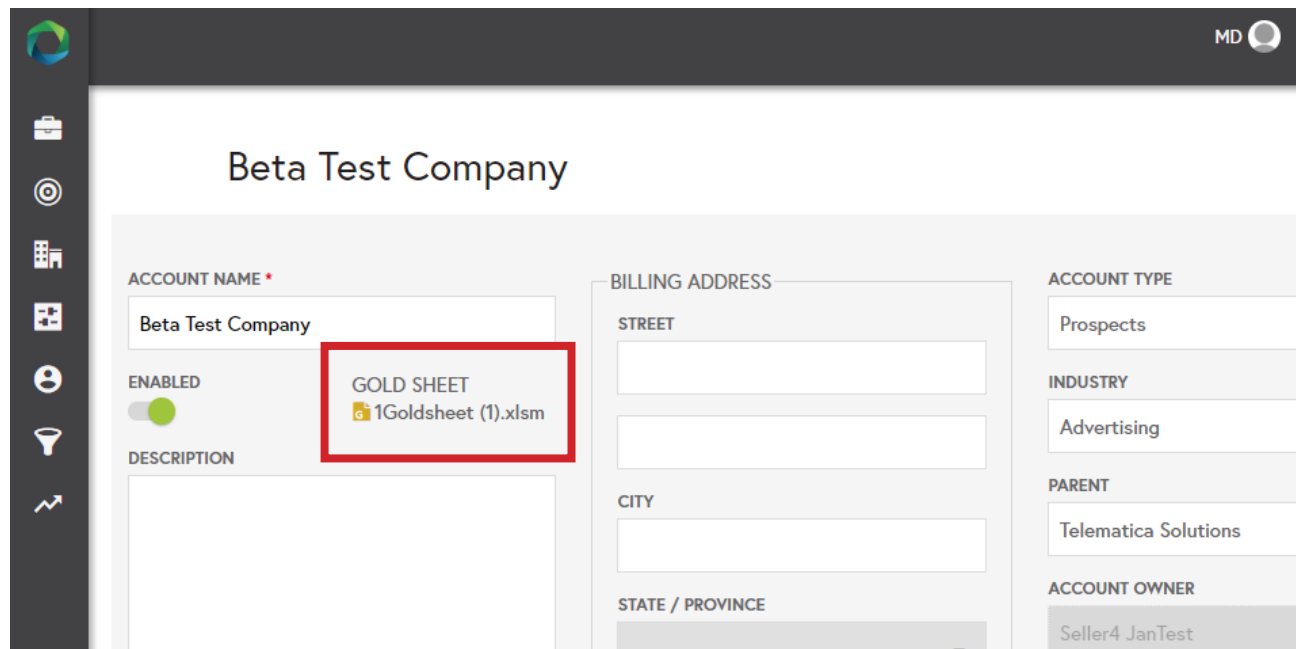
Large Account Management ProcessSM (LAMP[®]): Gold Sheet

In our January 2019 release, we provided a Gold Sheet Excel file for organizations that utilize Miller Heiman Group’s *Large Account Management ProcessSM* (LAMP[®]).

In the Summer Q3 release, we are providing an integrated Gold Sheet. This is accessible from the account list, by clicking on the Gold Sheet icon. This will launch a Gold Sheet that is fully integrated with Scout, much like the Blue and Green Sheets.

The integrated Gold Sheet will launch from a CRM account record, if Scout is integrated with an organization’s CRM.

This is an example:



Beta Test Company

ACCOUNT NAME *
Beta Test Company

ENABLED
☒ GOLD SHEET
1Goldsheet (1).xism

DESCRIPTION

BILLING ADDRESS
STREET

CITY

STATE / PROVINCE

ACCOUNT TYPE
Prospects

INDUSTRY
Advertising

PARENT
Telematica Solutions

ACCOUNT OWNER
Seller4 JanTest

CRM Mapping

The Miller Heiman Group Implementation Team will assist you and your organization's CRM administrator in the setup of a Scout CRM integration.

There are several items that will need to be configured in order for Scout to be integrated with your CRM:

CRM Credentials	• Instance (CRM) URL • Client ID • Organization name in Scout • User name • Slug • System type • Client password • Salesforce Security Token
CRM Values and Mappings	These settings determine the editing access to fields that are mapped from the CRM into Scout, and vice versa. Your organization can specify certain fields to be written to or mapped with Scout.
User Profiles	User profiles in the CRM will need to be mapped to roles in Scout. See the section on roles in this document to learn more.

Each of these configurable items has a section in the "CRM Mappings" tab of the "Customer Administrator" menu.

For details on the CRM integration process, please see the "Scout-Salesforce Integration Process Overview" administration document.

For standalone or non-CRM integration customers, the default setting for "Instance URL" will be "Null." If you would like to restrict the ability of users to edit certain fields, please contact scout.support@millerheimangroup.com for assistance.

CUSTOMER ADMINISTRATOR USER GUIDE

Organization Details Users **CRM Mapping** Custom Funnel Stage Scorecard Templates Rules Roles Custom Fields

CRM CREDENTIALS CRM VALUES AND MAPPINGS

CRM CREDENTIALS

SYSTEM TYPE *	SSO URL *
INSTANCE URL *	OAuth URL *
CLIENT ID *	CLIENT PASSWORD *
NAME *	SALESFORCE SECURITY TOKEN *
USERNAME *	PASSWORD *
SLUG *	API VERSION

Gretchen's Q3 Release Test Org 1
42.0

PreSync Save

Organization Details Users **CRM Mapping** Custom Funnel Stage Scorecard Templates Rules Roles Custom Fields

CRM CREDENTIALS CRM VALUES AND MAPPINGS

CRM VALUES AND MAPPINGS

SCOUT	CRM	MAPPING	PERMISSIONS
Account *	☐ +	☐ Write To CRM	☐ Skip Field ☐ Create ☐ Edit ☐ Include in Bulk Sync ☐ Include in inbound stream
City	☐ Edit ☐ + Select	☐ Add Value	☐ Write To CRM ☐ Skip Field
Country	☐ Edit ☐ + Select	☐ Add Value	☐ Write To CRM ☐ Skip Field
Billing Address 1	☐ Edit ☐ + Select	☐ Add Value	☐ Write To CRM ☐ Skip Field
Postal Code	☐ Edit ☐ + Select	☐ Add Value	☐ Write To CRM ☐ Skip Field
State	☐ Edit ☐ + Select	☐ Add Value	☐ Write To CRM ☐ Skip Field
Name *	☐ Edit ☐ + Select	☐ Add Value	☐ Write To CRM ☐ Skip Field
Description	☐ Edit ☐ + Select	☐ Add Value	☐ Write To CRM ☐ Skip Field
Industry	☐ Edit ☐ + Select	☐ Add Value	☐ Write To CRM ☐ Skip Field

CUSTOMER ADMINISTRATOR USER GUIDE

Phone	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
Website	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
Contact *	+			☐ Write To CRM	☐ Skip Field ☐ Create ☐ Edit ☐ Include in Bulk Sync ☐ Include in inbound stream
City	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
Country	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
Address Line 1	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
Postal Code	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
State	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
First Name *	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
Phone	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
Last Name *	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
Salutation	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field

Title	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
Opportunity *	+			☐ Write To CRM	☐ Skip Field ☐ Create ☐ Edit ☐ Include in Bulk Sync ☐ Include in inbound stream
Amount *	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
Bluesheet Last U...	☒ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
Business Score	☒ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
Custom Filter 3	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
Close Date *	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
Custom Filter 2	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
Custom Filter 1	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
Description	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
Name *	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
Opportunity Score	☒ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field

CUSTOMER ADMINISTRATOR USER GUIDE

Stage Name *	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
Total Score	☒ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
User *		+		☐ Write To CRM	☐ Skip Field
				☐ Create	☐ Edit
				☐ Include in Bulk Sync	☐ Include in inbound stream
Email	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
First Name	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
Home Phone	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
Last Login	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
Last Name	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
Title	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
Buying Influence Role		+		☐ Write To CRM	☐ Skip Field
				☐ Create	☐ Edit
				☐ Include in Bulk Sync	☐ Include in inbound stream
Buying Influence ...	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
Competition		+		☐ Write To CRM	☐ Skip Field
				☐ Create	☐ Edit
				☐ Include in Bulk Sync	☐ Include in inbound stream

Name	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
Possible Action		+		☐ Write To CRM	☐ Skip Field
				☐ Create	☐ Edit
				☐ Include in Bulk Sync	☐ Include in inbound stream
Action Priority Ty...	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
Action Status Type	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
Action Type	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
Description	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
Due Date	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
Record Access		+		☐ Write To CRM	☐ Skip Field
				☐ Create	☐ Edit
				☐ Include in Bulk Sync	☐ Include in inbound stream
Modify Access F...	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field
Read Access Flag	☐ Edit	+ Select	Add Value	☐ Write To CRM	☐ Skip Field

CUSTOMER ADMINISTRATOR USER GUIDE

USER PROFILES

SCOUT ROLES	SALESFORCE PROFILES
Global Collaborator	Choose ▾
Team Collaborator	Choose ▾
Sales Representative -Gold Sheet Testing	Choose ▾
Sales Representative	Choose ▾
Sales Rep- Team Collaborator Test	Choose ▾
Customer Admin	Choose ▾

Custom Funnel Stage

Scout has a default set of sales stages, based on the *Strategic Selling® with Perspective* program: “Prospect,” “Qualify,” “Pursue,” “Close,” “Closed Lost,” and “Closed Won.”

In the “Custom Funnel Stage” tab in the customer admin menu, you will see a number of elements related to the Funnel stages:

- Name
- Probability
- Report Mapping

The sales stages serve multiple functions:

- They serve as filters for the opportunity list and Funnel—across the top of the list and in the opportunity criteria filter. Users can determine the sales stages for which they are filtering the opportunity list.
- During opportunity creation, users select the sales stage from a drop-down menu.
- They provide visual indicators for the Funnel view, and also filter criteria in the “Show” filter in the Funnel.
- They trigger rules that are based on the sales stage.
- They can be mapped to performance stats and other reports.

The stage probability setting assigned to each stage determines the factored revenue that is calculated for each stage in the Funnel.

As customer admin:

- You have the ability to customize the names of sales stages, the probability, and the report mapping.
- You have the ability to add new sales stages and assign their probability and report mapping.
- You also have the ability to delete sales stages that do not apply to your organization.

Customize or Edit Sales Stage Names and Probability

To customize or edit the sales stage name and probability, simply click on the cell to begin editing.

Once you click on the cell, the “Cancel” and “Save Updates” options will appear at the bottom of the page.

Code	Name	Stage Probability	Report Mapping
PS	Prospecting	1 %	Early Stage
Q	Qualify	10 %	Mid Stage
PR	Pursue	50 %	Mid Stage
C	Close	80 %	Late Stage
CL	Closed Lost	100 %	Select Report Mapping
CW	Closed Won	100 %	Closed Won

+ Add New Stage Cancel Save Updates

Once you are done editing, click “Save Updates.”

Select Report Mapping

There are three choices for report mapping—“Early Stage,” “Mid Stage,” and “Late Stage.”

These stages appear in the “Performance Stats” report, and serve as a way for the organization to spot trends across sales stages, based on the *Strategic Selling*® methodology.

Stage	Blue Sheets	Revenue	Min Score	Max Score	Without Best Actions
EARLY STAGE:	1	1.262M	20	67	3
MID STAGE:	1	8.900k	67	67	1
LATE STAGE:	2	8M	67	67	2

Add a New Sales Stage

To add a new sales stage, select “Add New Stage.”

You can add as many sales stages as needed. If your organization uses multiple sales processes, you will want to instruct users on how to save a filter in the opportunity dashboard and Funnel so that they are filtered for only sales stages the users utilize.

Organization DetailsCRM MappingCustom Funnel StageScorecard Templates

Custom funnel Positions

Code	Name	Stage Probability	Report Mapping
PS	Prospect	1 %	Early Stage
Q	Qualify	10 %	Mid Stage
PR	Pursue	50 %	Mid Stage
C	Close	80 %	Late Stage
CL	Closed Lost	100 %	Select Report Mapping
CW	Closed Won	99 %	Closed Won
+ Add New Stage			

A blank sales stage row will appear at the bottom of the table.

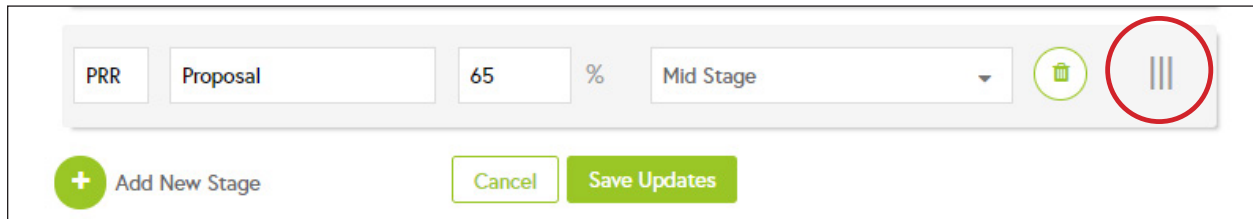
CW	Closed Won	99	%	Closed Won		
		100	%	Mid Stage		

+ Add New Stage

Cancel

Save Updates

Simply add a “code” in the first field (two to four letters; do not duplicate an existing code). Then type in the sales stage name and the probability percentage. Use the drop-down to select the report mapping.



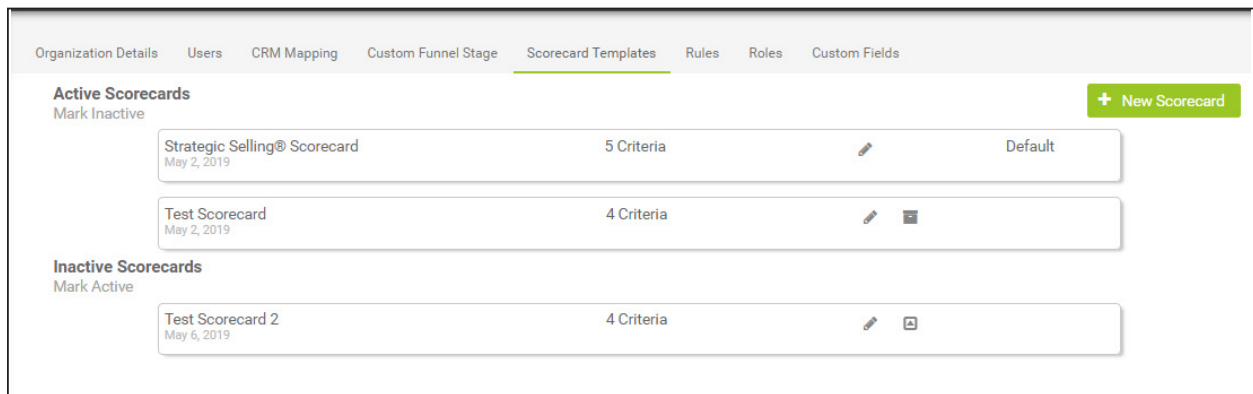
To move the stage to the desired order in the Funnel, click on the three-line indicator on the right side of the row. This will allow you to move the row into any position.

To delete a sales stage, simply click on the trash can icon.

Scorecard Templates

As customer administrator, you have the ability to create multiple Opportunity Scorecards for your organization to use.

Scout has a default Opportunity Scorecard, which is based on the scorecard from *Strategic Selling® with Perspective*.



The Opportunity Scorecard provides a dynamic and objective process for sales teams to evaluate opportunities.

Your sales leadership may work with Miller Heiman Group consultants to develop a scorecard that is custom to your organization. Please contact your Miller Heiman Group sales consultant for more information on our *Funnel ScoreCard®* program.

To create a new Opportunity Scorecard, click on “New Scorecard.”

This will open up a panel where you can enter a name for the scorecard, determine the section or criteria type (“Opportunity” or “Business”), enter the criteria title and criteria definition, and determine point values for each criteria.

The screenshot shows the 'Scorecard Templates' tab in a navigation bar. Below the navigation bar is a form to create a new scorecard. At the top, there is a text input field labeled 'Enter Scorecard Name' with 'Cancel' and 'Save' buttons to its right. Below this is the 'Scorecard Criteria' section, which includes a note: 'Responses for all questions are yes, unknown and no.' To the right of this note, it says 'Point Total :0' with a red triangle icon and 'Point total must equal 100'. The main form area has four columns: 'Section *', 'Title *', 'Criteria Definition *', and 'Point Value'. The 'Section *' column has a dropdown menu labeled 'Select Criteria Type'. The 'Title *' column has a text input field labeled 'Title'. The 'Criteria Definition *' column has a text input field labeled 'Question definition'. The 'Point Value' column has a text input field with the value '0' and a 'Delete' button. At the bottom left, there is a green plus icon and the text 'Add New Criterion'. At the bottom right, there are 'Cancel' and 'Save' buttons.

Scorecard Name

The name for the scorecard should be descriptive enough for users to know when that is an appropriate scorecard for their opportunity type, region or team. Simply click in the “Enter Scorecard Name” field and type in the name.

Section

To select the section in which the criteria will appear, click on the drop-down and select “Business” or “Opportunity.”

Business criteria include the demographics and psychographics of the buying organization. They are often measurable and assessed early in the sales cycle.

Opportunity criteria relate to the opportunity and the selling organization’s positioning. These are often measured or assessed as you move through the Sales Funnel.

Title

This is the title or name of the criterion. Click on the field to type in the name.

Criteria Definition

The definition provides detail for the user to know how the organization defines the criterion. The definition should be easily understood and applied.

Point Value

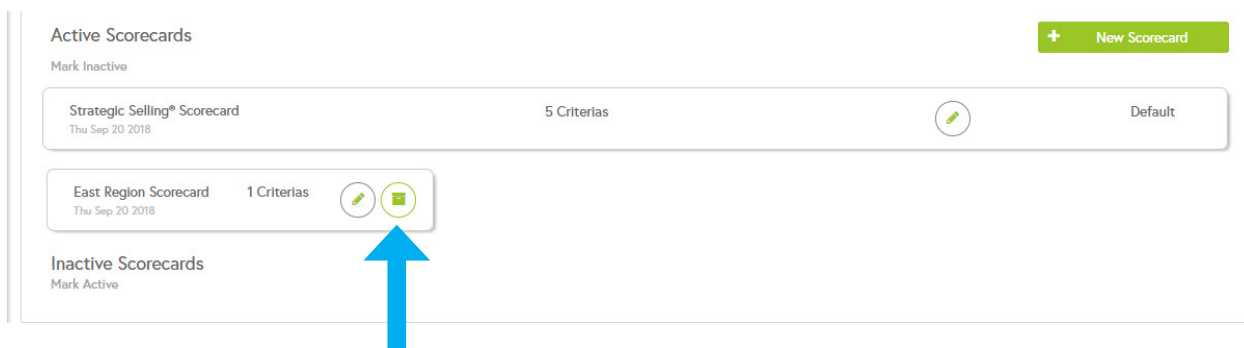
This is the “ranking” for each criterion. The total must equal 100 or the “Save” button will not be enabled.

To delete a criterion, click on the “Delete” check box.

Once you have entered all your criteria and scored appropriately, click “Save.”

Your new scorecard will be listed with the default *Strategic Selling*® scorecard in the scorecard template menu.

To make a scorecard inactive, simply click on the “file box” icon, to the right of the pencil icon.



To edit a scorecard, click on the pencil icon and then click in the fields to edit.

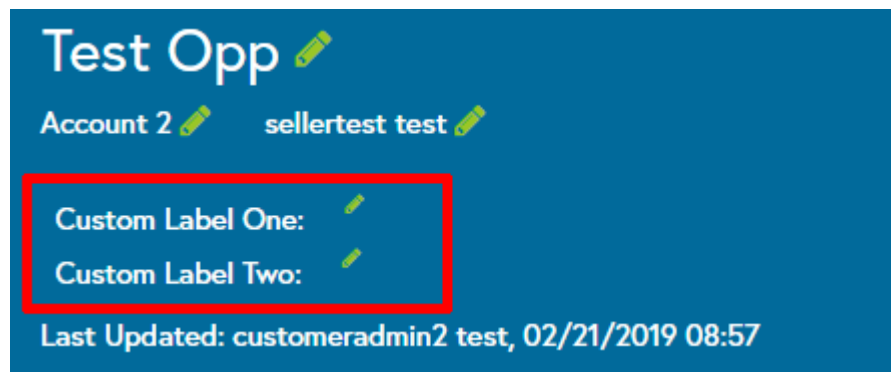
Custom Fields

Customer administrators have the ability to add custom fields to the Blue Sheet header and to the “Single Sales Objective” card in the Blue Sheet.

This enables an organization to enter specific information on the Blue Sheet and “Single Sales Objective” card to provide additional opportunity data that is not captured on the Blue Sheet.

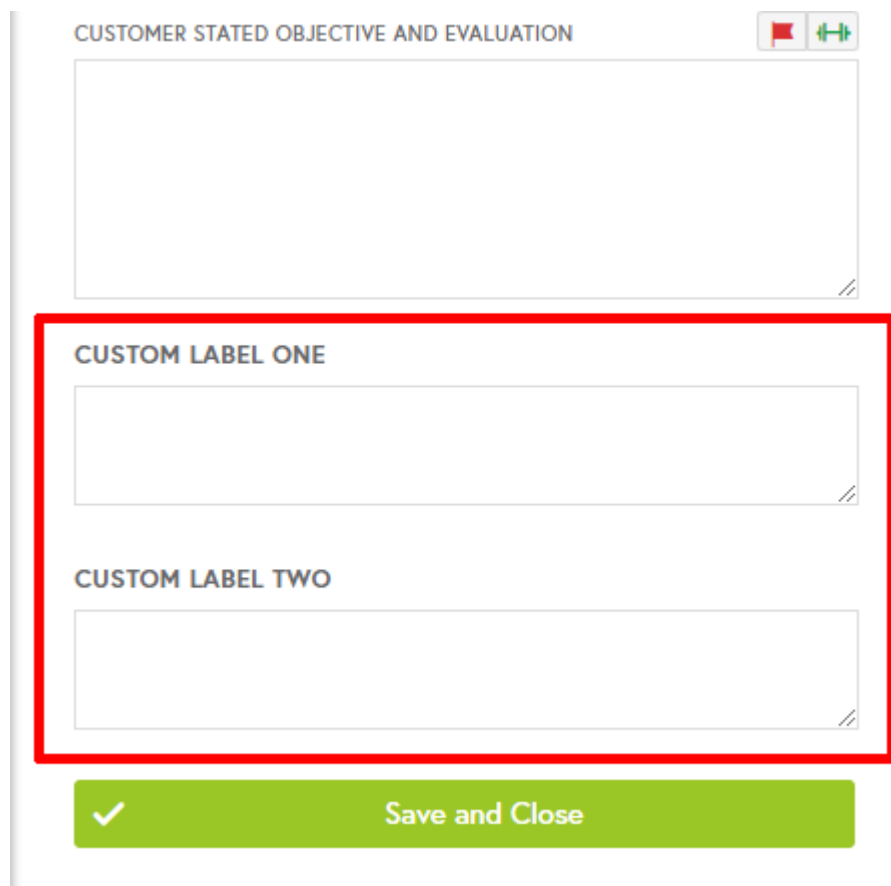
Two open text-entry fields may be added in either location.

Custom label example for the Blue Sheet header:



The image shows a blue header bar for a 'Test Opp' record. It includes the text 'Account 2' and 'sellertest test'. A red rectangular box highlights two lines of text: 'Custom Label One:' and 'Custom Label Two:'. Below this box, the text 'Last Updated: customeradmin2 test, 02/21/2019 08:57' is visible.

Custom label example for the Blue Sheet Single Sales Objective card:



The image shows a form titled 'CUSTOMER STATED OBJECTIVE AND EVALUATION'. It contains a large text area for the objective. Below this, there are two sections: 'CUSTOM LABEL ONE' and 'CUSTOM LABEL TWO', each with a text input field. A red rectangular box highlights these two sections. At the bottom of the form is a green button with a checkmark icon and the text 'Save and Close'.

To add these fields in the “Administration” function, click on the “Custom Fields” tab.

Custom Header Fields

☒ Custom Text Field Label 1

Custom Label One

☒ Custom Text Field Label 2

Custom Label Two

Custom Single Sales Objective Fields

☒ Custom Text Field Label 1

Custom Label One

☒ Custom Text Field Label 2

Custom Label Two

Save

Click on the check box next to the label you want to add, and then type the label name into the text field.

When you are done, click “Save.”

User Management

One of the first tasks for the customer administrator is to create users and to assign their roles. This will provide access to users for the organization.

Scout can send a registration link to users and allow them to create their own passwords, or a customer administrator can set up a user name and password for a user.

Basic Sequence

1. Determine the roles in your organization and manager assignments.
2. Determine the method of login (automated link or manual password creation by the customer administrator).
3. Add a new user by creating a user profile, creating manager users first.
4. Add other roles/users to the organization.

Let's take a look at Roles first, so you can understand how the hierarchy will work in Scout.

Scout Roles

Roles are extremely important to the way the participants in your organization will experience Scout. A user's role will determine what features are available to them and what (or whose) opportunities they can view or edit. Therefore, the user's roles should be carefully considered based on what permissions are desired. As customer admin, you have the most visibility and access in your organization. As you set up your organization's users, it is helpful to understand the permissions of the different Scout roles, and to map out your organization accordingly, to ensure the right users have the right access and visibility.

Your Scout organization will be set up with default roles, which are described in this section. You have the ability to create custom roles for your organization; however, it is best to understand how the default roles are defined before creating custom roles. There is a separate administrator's guide for custom role creation: "Scout: Custom Role Guide," available on the Scout Support page.

For each role, there are a set of permissions which control the rights for that role.

The following list shows the intended functions and the permissions that are needed for each role.

Note: Additional permissions can be disabled if your organization is using Scout with a CRM integration, and if the CRM interface defines the “edits” or “creates” which are not allowed. In Scout, the customer admin CRM integration function can disable the “edit” or “create” function of any CRM object.

Sales Representative Role and Permissions

The Sales Representative (Sales Rep) role can create opportunities and accounts. A Sales Rep can view, edit, and create Blue Sheets and Green Sheets that are associated with opportunities they own. A Sales Rep can share their opportunities, comment on their Blue Sheets, and see all reports for their user profile.

The Sales Rep role can be used for both individual sellers as well as sales managers. The difference for sales managers will be that they will see all items related to their reporting hierarchy: the Team View, the Team Filter, the opportunities for their reporting hierarchy, as well as any opportunities they own.

Here are the detailed permissions that are defaulted for the Sales Rep role:

Scout Function:	Sales Representative Permission:
Accounts	Create account
	Edit account I created
	View account details
	View account list
Opportunities	Create opportunity
	View opportunity dashboard
	Edit opportunity data in Blue Sheet and any shared Blue Sheets
Blue Sheet	Create Blue Sheet
	Edit Blue Sheet
	View Blue Sheet
	Create Blue Sheet comment
	Reply to Blue Sheet comment
	View Blue Sheet comments
	Share Blue Sheet—edit or view mode
	Export PDF of Blue Sheet

Green Sheet	Create Green Sheet
	Edit Green Sheet
	View Green Sheet
Gold Sheet	Create Gold Sheet
	Edit Gold Sheet
	View Gold Sheet
	Share Gold Sheet—edit or view mode
	Export PDF of Gold Sheet
Funnel	View Funnel of seller opportunities
Trends & Insights	View reports for seller opportunities
Team View – will appear for users with reporting hierarchy	View team profiles
	Edit user ratings
	View user revenue quota
	Edit user revenue quota

Global Collaborator Role and Permissions

The Global Collaborator role provides view access to opportunities across the organization. The Global Collaborator can also comment and reply to comments within the Blue Sheet.

Scout Function:	Global Collaborator Permission:
Opportunities	View “Opportunities” dashboard for all opportunities
	Edit “Opportunities” data in Blue Sheet (if shared Blue Sheet with edit access)
Blue Sheet	View Blue Sheet
	Create Blue Sheet comment
	Reply to Blue Sheet comment
	View Blue Sheet comments
	Export PDF of Blue Sheet
Green Sheet	View Green Sheet
	Edit Green Sheet if Blue Sheet is shared with edit access

Team Collaborator Role and Permissions

The Team Collaborator role provides view access to all data within a Manager’s team. The Team Collaborator role is also allowed to comment and reply to comments within any Blue Sheet that is within the team. The Manager’s team is defined by the assignment of the Manager to all the Manager’s direct reports.

Scout Function:	Team Collaborator Permission:
Opportunities	View “Opportunities” dashboard for team opportunities
	Edit opportunity data in Blue Sheet (if it is shared with edit access)
Blue Sheet	View Blue Sheet
	Create Blue Sheet comments
	Reply to Blue Sheet comments
	View Blue Sheet comments
	Export PDF of Blue Sheet
Green Sheet	View Green Sheet
	Edit Green Sheet (if Blue Sheet is shared with edit access)

Global Viewer/Editor Role and Permissions

The Global Viewer permission provides view or edit access to any opportunity sent via Salesforce or Scout link to another user. This allows a Scout user to send a link to a Blue Sheet to another Scout user without using the Blue Sheet share function.

Global Viewer by Link Permission:	Description:
	If a user has the “Global Viewer by Link” permission and receives a link to a Blue Sheet via Scout or Salesforce, they will be able to view the associated Blue Sheet. The recipient must be logged in to Salesforce or Scout to view the Blue Sheet. If the link is from Salesforce, it must have the external key. This is different from the Blue Sheet share function. When using the Global Viewer role, the opportunities that can be viewed will not appear in the recipients’ opportunity list, Funnel, or reports. The Global Viewer by Link permission only applies to the Blue Sheet.
Global Editor by Link Permission:	Description:
	If a user has the “Global Editor by Link” permission and receives a link to a Blue Sheet via Scout or Salesforce, they will be able to view and edit the associated Blue Sheet. The recipient must be logged in to Salesforce or Scout to gain access to the Blue Sheet. If the link is from Salesforce, it must have the external key. This is different from the Blue Sheet share function. When using the Global Editor permission, the opportunities that can be viewed will not appear in the recipients’ opportunity list, Funnel, or reports. The Global Editor by Link permission only applies to the Blue Sheet in this release.

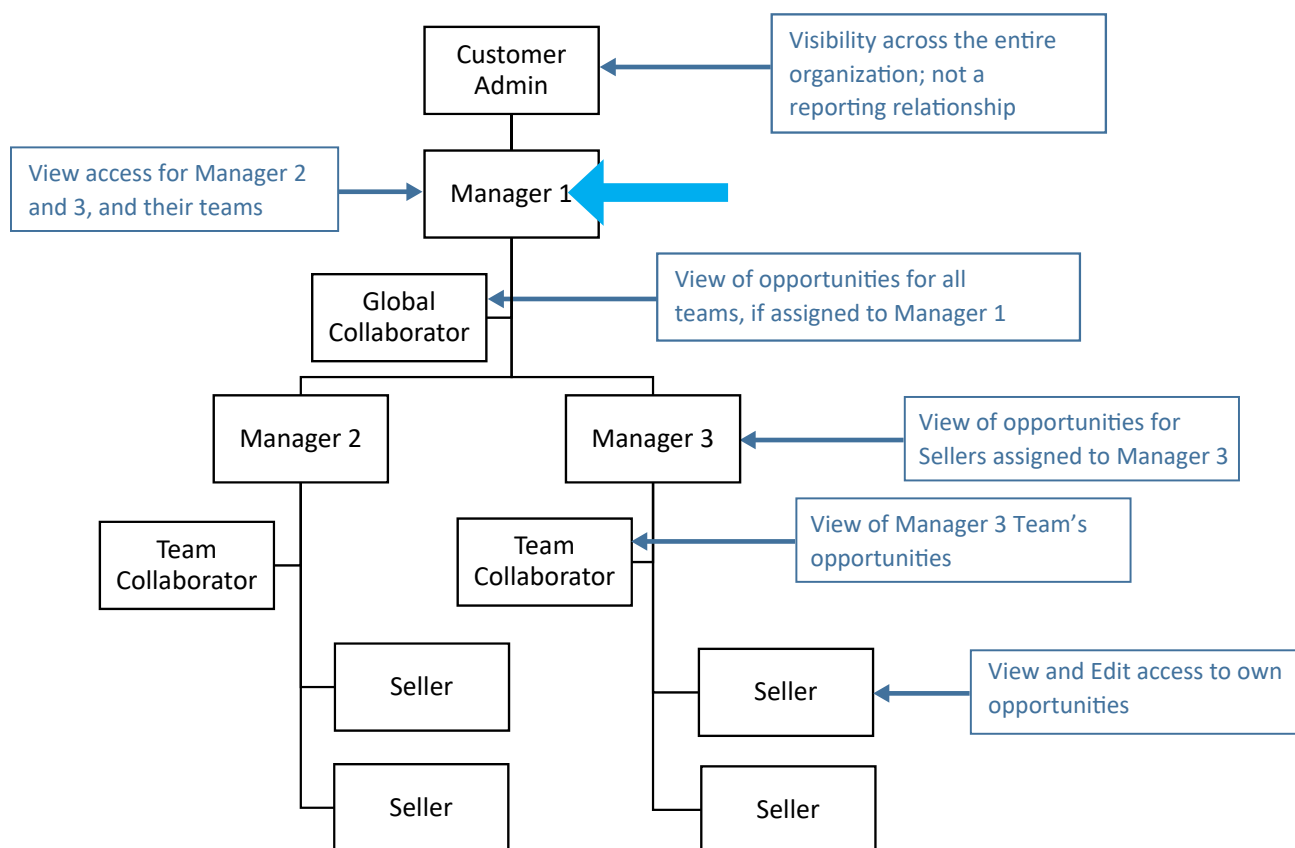
Customer Administrator Role and Permissions

The Customer Administrator role can be considered a “super user” for the organization. The Customer Administrator has access to add, edit, and change all opportunities, Blue Sheets, Green Sheets, accounts, and contacts that are within their assigned organization. In addition, the Customer Administrator role can configure a number of the features of the Scout application at an organizational level.

Scout Function:	Customer Administrator Permission:
Accounts	Create account
	View account details
	Edit account details
	View account list
	Disable/enable account
Opportunities	Create opportunity
	View “Opportunities” dashboard (for all Manager hierarchies)
	Edit opportunity data in Blue Sheet for all opportunities
Blue Sheet	Create Blue Sheet
	Edit Blue Sheet
	View Blue Sheet
	Create Blue Sheet comment
	Reply to Blue Sheet comment
	View Blue Sheet comments
	Share Blue Sheet—edit or view mode
	Export PDF of Blue Sheet
Green Sheet	Create Green Sheet
	Edit Green Sheet
	View Green Sheet (for all Manager hierarchies)
Gold Sheet	Create Gold Sheet
	Edit Gold Sheet
	View Gold Sheet
	Share Gold Sheet—edit or view mode
	Export PDF of Gold Sheet
Funnel	View Funnel of all opportunities in the organization
Trends and Insights	View reports for all manager hierarchies in the organization

Organization: Scout Administration	Add user
	Create password for users
	Reset user password
	Create password complexity for organization
	Create and edit roles
	Enable/disable users
	Edit standard rules
	Create new rules
	CRM mapping for CRM integration
	Create custom Funnel stages, scorecards, and fields on Blue Sheets

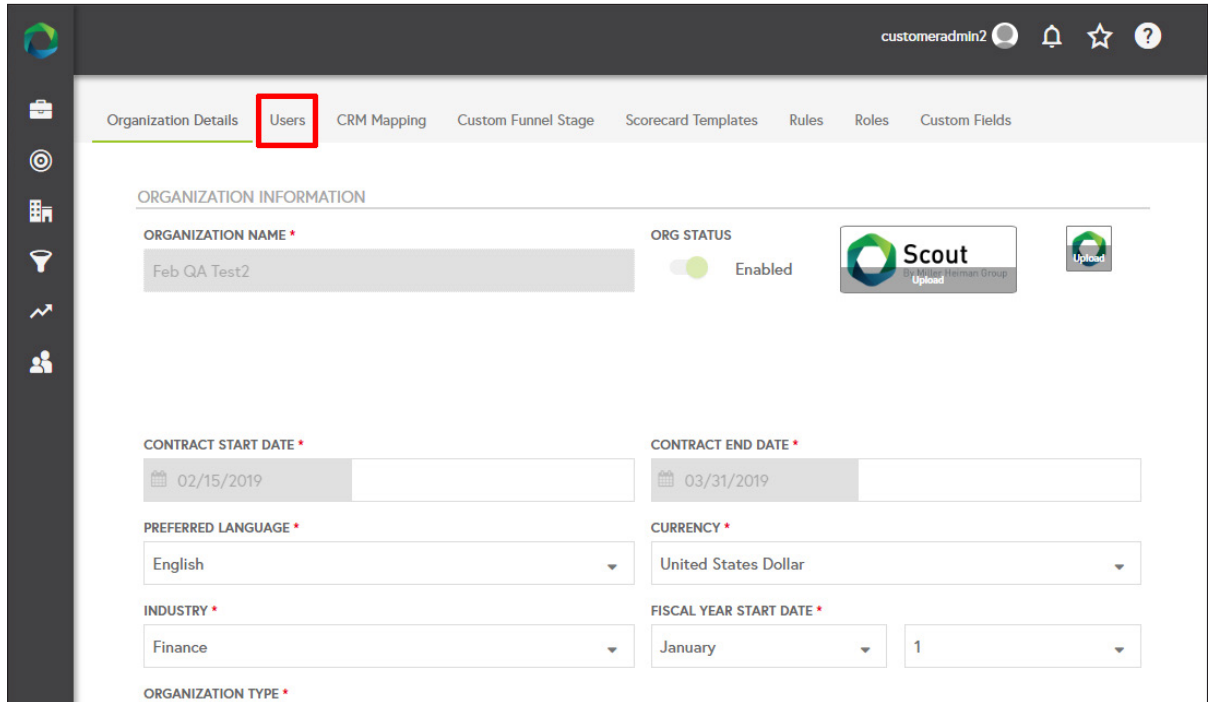
Here is an example organization chart based on Scout roles:



Create a New User

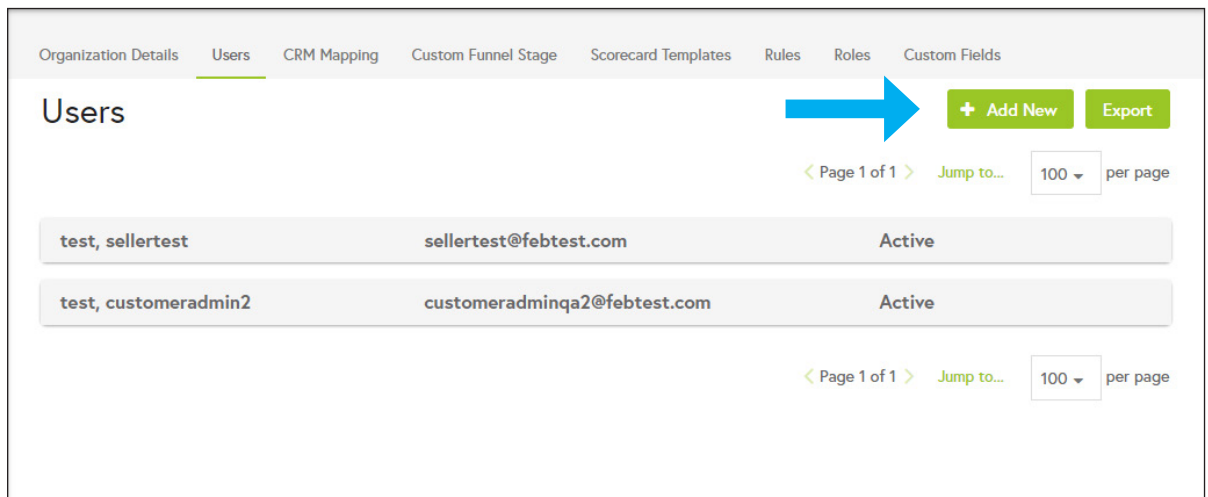
To create a new user, you will have to access the “Users” tab in the “Administration” function:

1. Click the “Users” tab.



The screenshot shows the Scout CRM Administration interface. The top navigation bar includes tabs for Organization Details, Users, CRM Mapping, Custom Funnel Stage, Scorecard Templates, Rules, Roles, and Custom Fields. The 'Users' tab is highlighted with a red box. Below the navigation bar, the 'ORGANIZATION INFORMATION' section is visible, containing fields for Organization Name (Feb QA Test2), Org Status (Enabled), Contract Start Date (02/15/2019), Contract End Date (03/31/2019), Preferred Language (English), Currency (United States Dollar), Industry (Finance), and Fiscal Year Start Date (January).

2. Click the “Add New” button.



The screenshot shows the Scout CRM Users page. The top navigation bar includes tabs for Organization Details, Users, CRM Mapping, Custom Funnel Stage, Scorecard Templates, Rules, Roles, and Custom Fields. The 'Users' tab is highlighted. Below the navigation bar, the 'Users' section is visible, containing a table of users. A blue arrow points to the '+ Add New' button. The table lists two users: 'test, sellertest' and 'test, customeradmin2', both with email addresses and 'Active' status. The page also includes pagination controls showing 'Page 1 of 1' and a 'Jump to...' dropdown set to '100 per page'.

Name	Email	Status
test, sellertest	sellertest@febtest.com	Active
test, customeradmin2	customeradminqa2@febtest.com	Active

3. In the “Add New User” window, fill out the unique user information (important notes are shown on the pages that follow):



Add New User

Name *

Email *



Personal Phone





Work





Manager

Organization *

Preferred Language

Expiration Date



Status

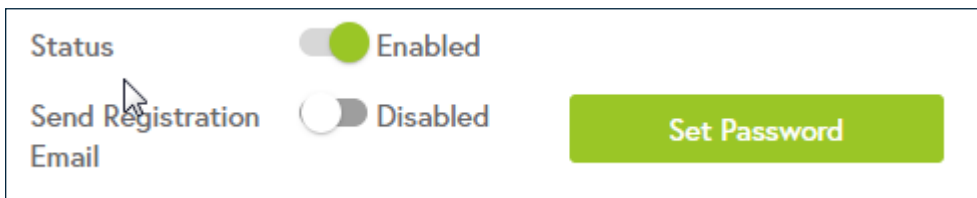
☒ Active

Send Registration Email

☒ Enabled

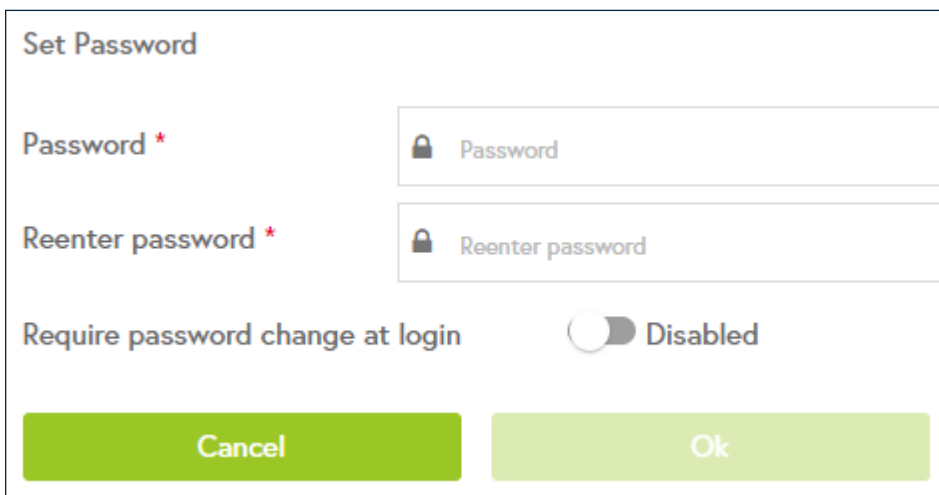
Important Notes:

1. Manager users must be set up prior to their direct reports, so that you may assign them as managers when you create the direct report users.
2. To select a Manager assignment for a user, start typing their name in the text box for the list to populate.
3. Administrators can assign a preferred language for a particular user if it is different than the organization's preferred language. Users can also choose a preferred language in their user profile.
4. If you plan to give a manual user name and password, under "Send Registration Email," toggle to "Disabled." Then click "Set Password":



This screenshot shows a configuration panel for a user. It includes two toggle switches: 'Status' is currently 'Enabled' (indicated by a green circle), and 'Send Registration Email' is currently 'Disabled' (indicated by a grey circle). A green button labeled 'Set Password' is positioned to the right of the 'Send Registration Email' toggle.

- *If this option is selected, users will not receive an email notification.*



This screenshot shows a 'Set Password' dialog box. It contains two input fields: 'Password' and 'Reenter password', each with a lock icon. Below these fields is a toggle switch for 'Require password change at login', which is currently 'Disabled'. At the bottom are two buttons: a green 'Cancel' button and a light green 'Ok' button.

5. Next, assign the roles for the user. Click the pencil next to "Assigned Role(s)."



This screenshot shows a text field labeled 'Assigned Role(s)'. To the right of the text is a circular icon containing a pencil. A large green arrow points from the right towards the pencil icon, indicating where to click.

6. Check the boxes next to the role the user will be assigned.
 - a. Users can have more than one role selected.

Assign Role(s)

☐ Customer Admin
 ☐ Global Collaborator

☐ Sales Representative
 ☐ Team Collaborator

Cancel
Save

7. Once all the information has been populated for the New User, click “Save.”
8. *Assigning a revenue target or sales quota:* When you have created a user and assigned a role, you have the option to assign the user a revenue target. This target will be visible to the user in their profile, but they will not be able to edit it. Managers also have the ability to edit the target in the team view, in the individual user profile.
You can also access this revenue target from the user list by opening the user profile.

Edit User

Name *

Email *

Personal Phone

Work

Manager

Title

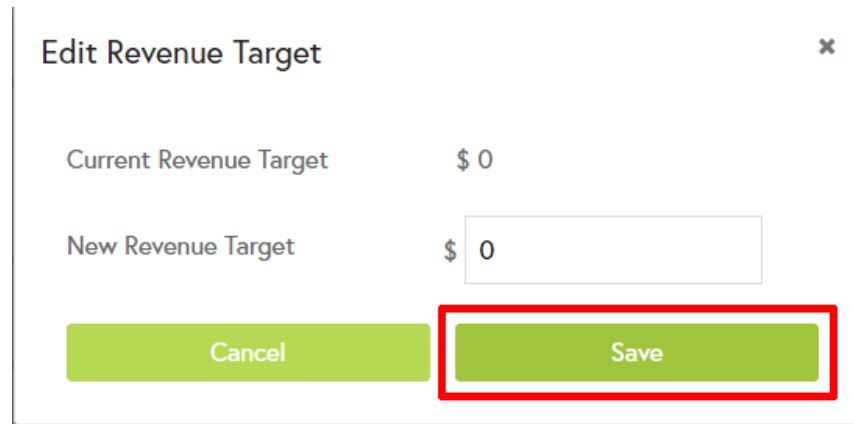
Assigned Role(s)*

Sales Representative

Revenue Target

\$0

Click on the pencil icon to open up the “Edit Revenue Target” window, and enter the value in the “New Revenue Target” field. Then click “Save.”



Edit Revenue Target ✕

Current Revenue Target \$ 0

New Revenue Target \$ 0

Cancel Save

9. Once back on the “Edit User” page, click “Save” again.
 - a. Emails are automatically generated if “Send Registration Email” is enabled.

Edit/View User Profile Details

To edit a user, start from “Users.”

1. In the “Administration” menu, select the “Users” tab.
2. Click on the user’s name in the list to open the user profile.

Suspend/Activate User Account

To suspend or activate a user, start from the “Users” menu.

1. In the “Administration” menu, select the “Users” tab.
2. Click on the user’s name to open the user profile.
3. Move the “Status” toggle to “Suspended” or “Active.”
4. Click “Save.”

Edit User

Name *

Email *

Personal Phone

Work

Manager Title

Organization *

Preferred Language

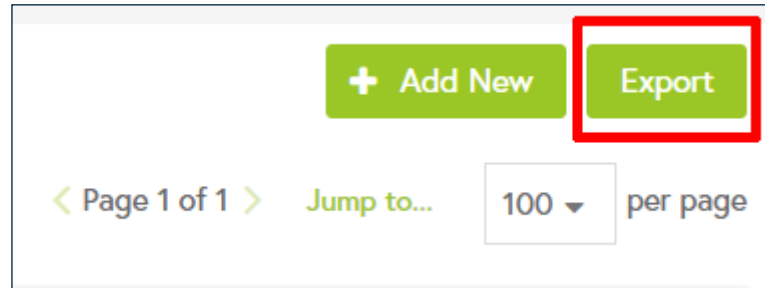
Expiration Date

Status ☒ Active ☐ Suspended

Send Registration Email ☐ Enabled ☒ Disabled

Export User List

Customer administrators can export a list of users in their organization by clicking on the “Export” button on the user list dashboard.



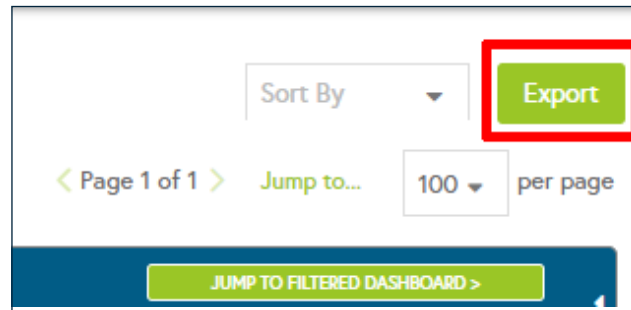
The export will download as a CSV file containing:

- First and last name
- Email
- Phone numbers as entered on the user creation form
- Organization assignment
- Language preference
- Status
- Roles (up to three)
- Expiration date

Export Performance Stats

All users can export data from the Performance Stats dashboard.

This is done by clicking on the “Export” button located at the top right of the performance stats report list.



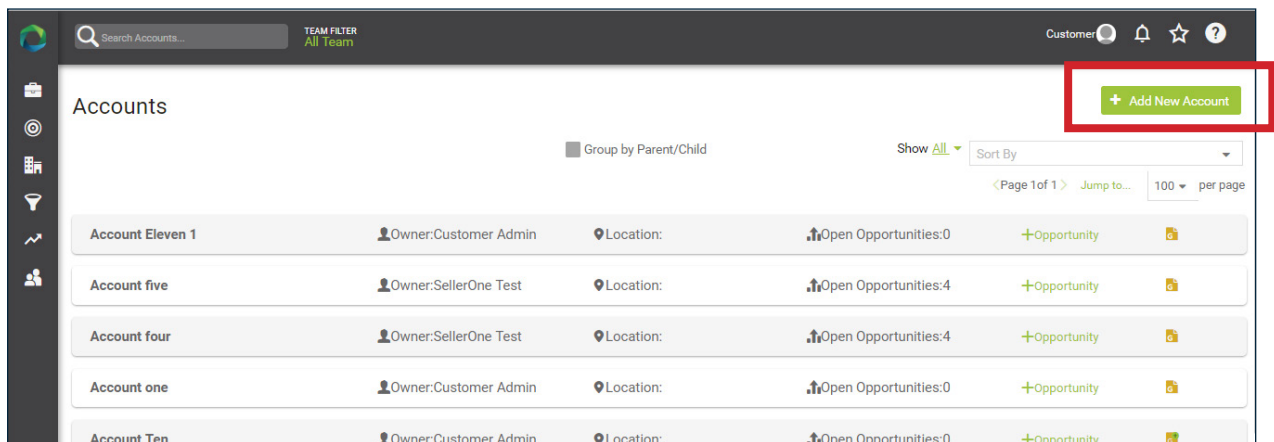
The export will download as a CSV file containing:

- First and last name
- Number of opportunities
- Number of Blue Sheets
- Number of Green Sheets
- Number of alerts
- Number of Best Actions
- Early stage, Mid stage and Late Funnel stage data, broken out by item

Account Management

Customer administrators have the ability to create and edit accounts. If your organization is using Scout integrated with a CRM, accounts may be imported into Scout from the CRM.

Sales Representative roles in Scout also have the ability to create and edit accounts. The “Accounts” list is available in the left-hand menu.



Create an Account

To create a new Account, click on “Add New Account.”

This will open the “Create New Account” form:

The 'CREATE NEW ACCOUNT' form is displayed with the following fields and sections:

- ACCOUNT NAME:** Includes a text field for 'Enter Account Name', an 'ENABLED' toggle switch, and a 'DESCRIPTION' text area.
- BILLING ADDRESS:** Includes text fields for 'STREET', 'CITY', 'STATE / PROVINCE', 'ZIP / POSTAL CODE', and 'COUNTRY'.
- ACCOUNT TYPE:** Includes dropdown menus for 'ACCOUNT TYPE' (set to 'Prospect'), 'INDUSTRY', and 'PARENT'.
- ACCOUNT OWNER:** Includes a text field for 'Enter Website'.
- PHONE:** Includes a text field for 'Enter Phone Number'.

A '+ Save' button is located at the bottom right of the form.

To create a new account, complete the following:

Enter the Account Name:	Simply click on the field and type in the name.
Enter the Description:	Simply click on the field and type in any desired description.
Enter the Billing Address:	Enter the business address for the account.
Select the Account Type:	Select the account type from the drop-down: "Prospect," "Customer," "Partner," or "Individual."
Select the Industry:	Select from the industry type drop-down.
Select the Parent Account:	Select a parent account as appropriate; this will populate from account names in Scout. If the parent account has not been entered yet, it will not appear here.
Account Owner:	The owner will automatically default to the user creating the account.
Website:	Enter the URL for the account's website.
Phone:	Enter a primary contact number.

Accounts can also be added by entering the account name in the "Add New Opportunity" form, and then entering the details for the account on the account detail page.

View Accounts and Associated Opportunities

Once accounts are entered into Scout, and opportunities are created that are associated with the accounts, you can view the account data in the “Accounts” list.

When you click on an account from the account list, you will see several tabs associated with accounts: “Account Details,” “Associated Opportunities,” and “Buying Influences.”

American Airlines

Account Details | Associated Opportunities | Buying Influences

ACCOUNT NAME

Account Name

DESCRIPTION

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

BILLING ADDRESS

Street

123 Main St.

Ste 4400

City

Realtown

State / Province

ST

ZIP / Postal Code

43290

Country

United States of America

ACCOUNT TYPE

Type

INDUSTRY

Industry

PARENT

Parent Account

ACCOUNT OWNER

Creator Name

WEBSITE

www.accountnameurl.com

PHONE

(917) 312-6049

Save Changes

The “Account Details” tab contains the details displayed above.

“Associated Opportunities” displays a list of opportunities associated with the account:

American Airlines

Account Details

Associated Opportunities

Buying Influences

Search

ASSOCIATED OPPORTUNITIES (2)

sellertest test

contact test opp

Account 2

\$ 75k

April 24, 2019

Scorecard None

sellertest test

Opp one test

Account 2

\$ 50k

April 25, 2019

Scorecard 40

The “Buying Influences” tab contains a list of the Buying Influences associated with the account, and also contains a list of the opportunities they are aligned with as Buying Influences.

American Airlines

Account Details

Associated Opportunities

Buying Influences

Search

Smith, Joanna

Account Manager

Alabama, US

Number of Opportunities: 3

UI Revamp Demo

\$30M

Stage: Pursue

Roles: E T

High

Growth

+3

UI Revamp Demo

\$30M

Stage: Pursue

Roles: E T

High

Growth

+3

UI Revamp Demo

\$30M

Stage: Pursue

Roles: E T

High

Growth

+3

Search/Filter/Sort

From the account list, you have several ways to filter and sort and search for accounts.

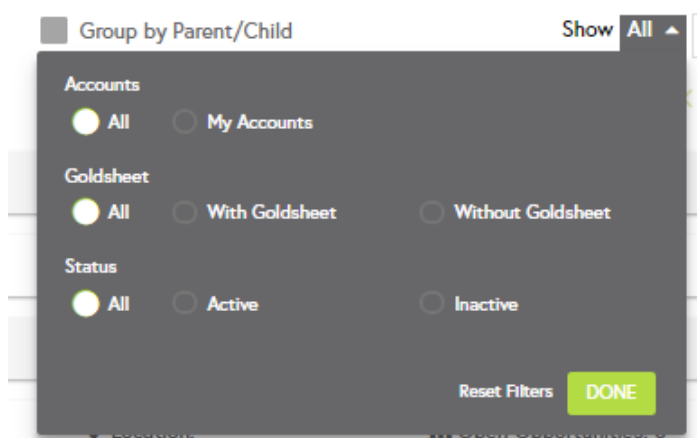
Search Accounts...		Basic Search		Rich	
Accounts		Filter/Sort		+ Add New Account	
		☐ Group by Parent/Child		Without Gold Sheet Account Name	
		Page 1 of 1		Jump to... 100 per page	
CC Test	Owner: Rich Miller	Location:	Open Opportunities: 1	+ Opportunity	
Cybage Software Private Limited	Owner: Rich Miller	Location: Riau Kepulauan, ID	Open Opportunities: 1	+ Opportunity	
Demo	Owner: Rich Miller	Location: Auvergne, DE	Open Opportunities: 2	+ Opportunity	

Basic Search

To search for an account, simply enter at least three characters of the account name in the search box. The list will dynamically change as you type in the name. To remove the search, simply delete it from the search box.

Filter

There are several ways to filter accounts using the “Show” filter.



Filter by:

- Account ownership
- With or without Gold Sheets (if used by your organization)
- “Active” or “Inactive” status (inactive opportunities are ones that are “Closed Lost” or “Closed Won”)

Sort

Parent/Child Sort View

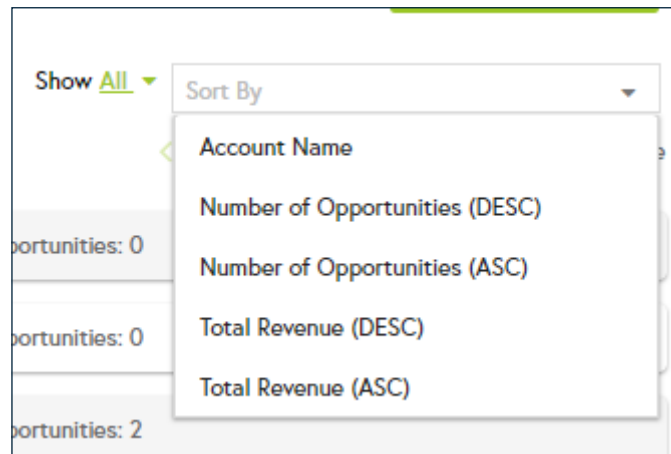
Users have the ability to view the account list by “Parent/Child” relationships.

Go to the “Accounts” function and check the box next to “Group by Parent/Child.”

This will sort the list according to the parent assignments that are entered into the account detail page.

Child accounts will be indented below the parent account.

The “Sort By” drop down allows you to sort the account list by a variety of options:



- Account Name
- Number of Opportunities (ascending or descending order)
- Total Revenue (ascending or descending order)

Edit an Account

From the account list, simply click on one of the accounts to view the details that have been entered. As a customer administrator, you can edit details on the account by clicking on the field and editing the data.

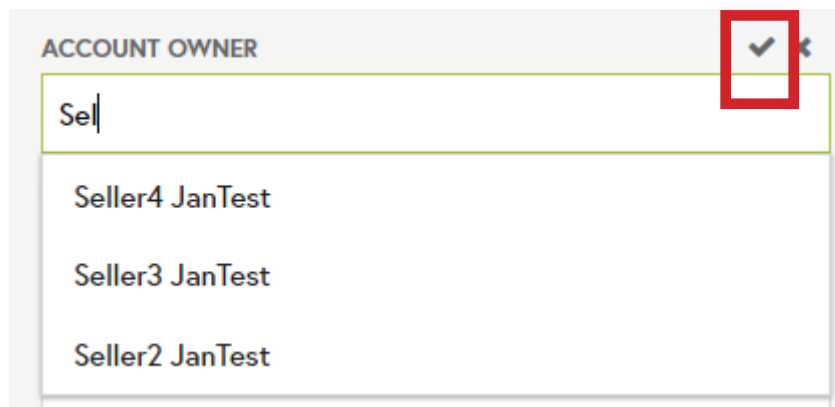
Change an Account Owner

Customer administrators have the ability to change the owner of an account. (Note: This only applies to non-CRM integrated organizations in Scout.)

To change the account owner, simply navigate to the account detail screen, and use the pencil icon to edit to the name of the account owner.



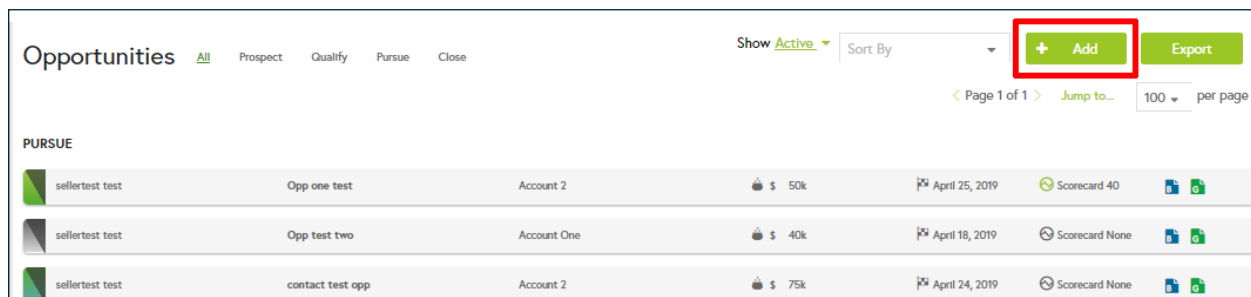
When you click into the owner name field, delete the current user name. Then type the new user's name and select it from the user list. Click the check mark to save.



Opportunity Management

Customer administrators have the ability to create and edit opportunities. If your organization is using Scout integrated with a CRM, opportunities may be imported into Scout from the CRM.

Sales representative roles in Scout also have the ability to create and edit opportunities. The opportunity list is available in the left-hand menu.



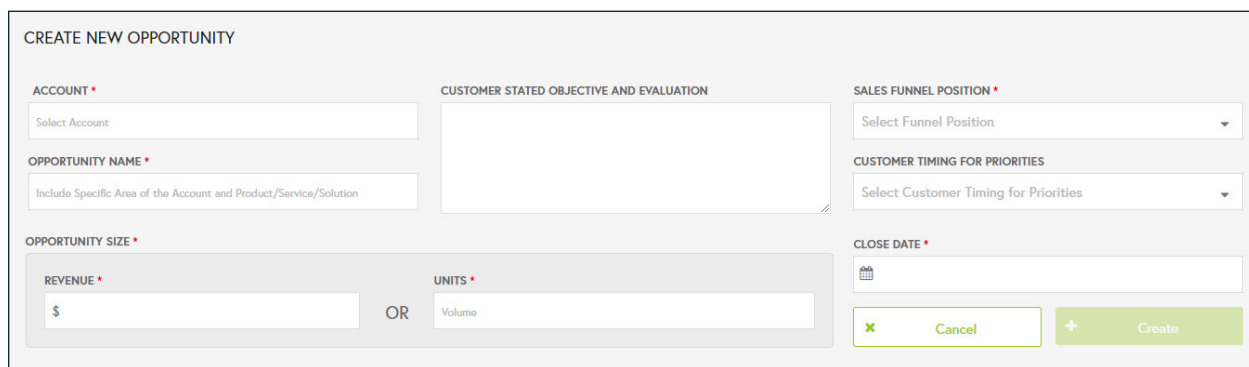
The screenshot shows the 'Opportunities' page in Scout. At the top, there are tabs for 'All', 'Prospect', 'Qualify', 'Pursue', and 'Close'. The 'Show' dropdown is set to 'Active'. To the right of the 'Sort By' dropdown, the '+ Add' button is highlighted with a red box. Next to it is an 'Export' button. Below the navigation bar, there is a table of opportunities under the 'PURSUE' tab. The table has columns for account, opportunity name, value, date, and scorecard.

Account	Opportunity Name	Value	Date	Scorecard
Account 2	Opp one test	\$ 50k	April 25, 2019	Scorecard 40
Account One	Opp test two	\$ 40k	April 18, 2019	Scorecard None
Account 2	contact test opp	\$ 75k	April 24, 2019	Scorecard None

Create an Opportunity or Blue Sheet

To create a new opportunity, click on “Add.” Select “Opportunity” or “Blue Sheet” from the drop-down.

This will open the opportunity/Blue Sheet creation form:



The screenshot shows the 'CREATE NEW OPPORTUNITY' form. It has several sections for input:

- ACCOUNT ***: A dropdown menu with 'Select Account'.
- OPPORTUNITY NAME ***: A text input field with placeholder text 'Include Specific Area of the Account and Product/Service/Solution'.
- OPPORTUNITY SIZE ***: A section with two options: 'REVENUE *' (with a '\$' symbol and a text input) and 'UNITS *' (with 'Volume' and a text input), separated by an 'OR'.
- CUSTOMER STATED OBJECTIVE AND EVALUATION**: A large text area for notes.
- SALES FUNNEL POSITION ***: A dropdown menu with 'Select Funnel Position'.
- CUSTOMER TIMING FOR PRIORITIES**: A dropdown menu with 'Select Customer Timing for Priorities'.
- CLOSE DATE ***: A date picker.

At the bottom right, there are two buttons: 'Cancel' (with a red X icon) and 'Create' (with a green plus icon).

To create a new opportunity, complete the following:

Enter the Account Name:	Simply click on the field and type in the account name. If the account exists, it will appear in the typeahead. A new account can also be added by simply typing in the name. Once you save the opportunity, the account will be saved in Scout.
Enter the Opportunity Name:	Click on the field and type in the description of the Single Sales Objective.
Enter the Revenue or Units:	Click on the fields and type in the numbers associated with revenue or units. If your organization is writing these in from the CRM, they may not be editable.
Enter the Customer's Stated Objective and Evaluation:	Click on the field and type in the description of the customer's stated objective and evaluation. Review the <i>Strategic Selling® with Perspective</i> Field Guide (on the Scout Support page) for details on this concept.
Select the Funnel Position:	Select the Sales Funnel position from the drop-down. If your organization is writing the sales stages in from the CRM, these may not be editable.
Select the Customer Timing for Priorities:	Select the customer timing for priorities from the drop-down. Review the <i>Strategic Selling® with Perspective</i> Field Guide on the Scout Support page for details.
Close Date:	Enter this date using the calendar widget. If your organization is writing close dates in from the CRM, these may not be editable.

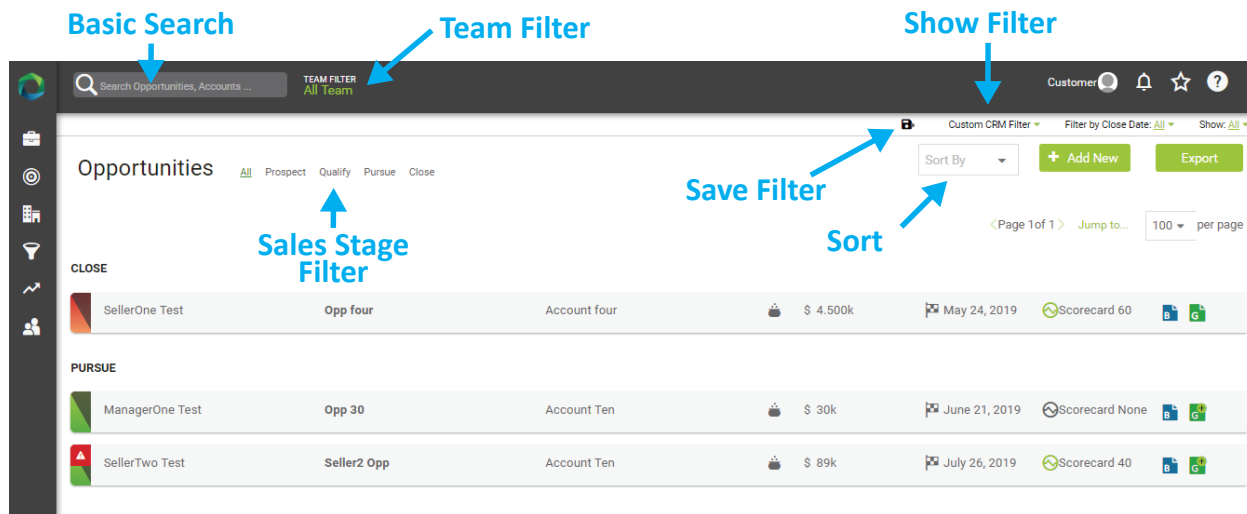
Once all the data is entered, click "Create."

View Opportunities

Once opportunities are entered into Scout, the opportunities will appear on the opportunity dashboard, which is the "home page" in Scout.

Filters/Sort and Search

From the opportunity list, you have several ways to filter, sort, and search for opportunities.



Basic Search

To search for an opportunity, simply enter at least three characters of the opportunity name in the search box. Then press “Enter.” The list will change and display the opportunities that contain the letters typed in the search box. To remove the search, delete it from the search box using the “X.”

Team Filter

The team filter provides a filter by opportunity owner name. Individual sellers will see their own name or names of colleagues they are assigned in Scout as collaborators.

Managers will see the names of the sellers or managers that report to them. Clicking on “Team Filter” opens the list of names which can be selected individually or as a team. Names can also be searched using the “Search” box.

TEAM FILTER
All Team

Select the team member(s) you'd like to focus on.

☒ See All [Show My Opportunities](#)

Search ☒ Individual ☐ Team

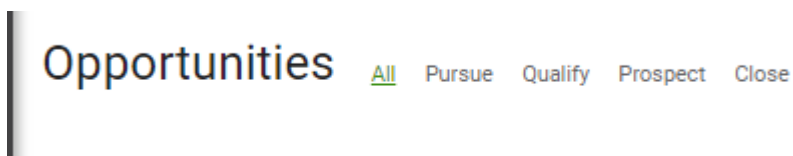
☒ Alyssa Lemboaugtest	☒ Andrew Heilmanaugtest
☒ Brendan Hawkinsaugtest	☒ David Helleraugtest
☒ GManager Porkertaugtest	☒ Global2 Collaborator2
☒ Gretchen QA1	☒ Joi Hagerty
☒ Julian Chu	☒ Justin Florianaugtest
☒ Lisa Ellisaugtest	☒ Mike Kerr
☒ Mine Testing	☒ New User
☒ NewUser Test	☒ Pamela Hammers
☒ Rachel Norkinaugtest	☒ Retest NewUser
☒ Rich Leeaugtest	☒ Rich Miller

DONE

When all the selections are made, select “Done.”

Sales Stage Filters

The opportunity list can be filtered to display a single sales stage, using the stage filter at the top left of the opportunity list. The opportunity list can also be filtered by several sales stages, using the “Show” filter (see next section).



“Show” Filters

The opportunity list can be filtered by several status criteria at once:

Opportunity Criteria

☒ All
 ☐ With Blue Sheets
 ☐ Without Blue Sheets
☒ All
 ☐ With Green Sheets
 ☐ Without Green Sheets
☐ All
 ☒ Active
 ☐ Inactive

☐ Deals With Alerts

☐ Days in Stage: to

☐ Revenue: to

☐ Scorecard:

☐ Score: to

☐ Account:

☐ Funnel Stage:

Reset Filters **DONE**

Choose any combination of the opportunity criteria. The filter defaults to “Active” opportunities.

Sort By

The opportunity list can be sorted by a number of opportunity-related criteria:

Sort by...

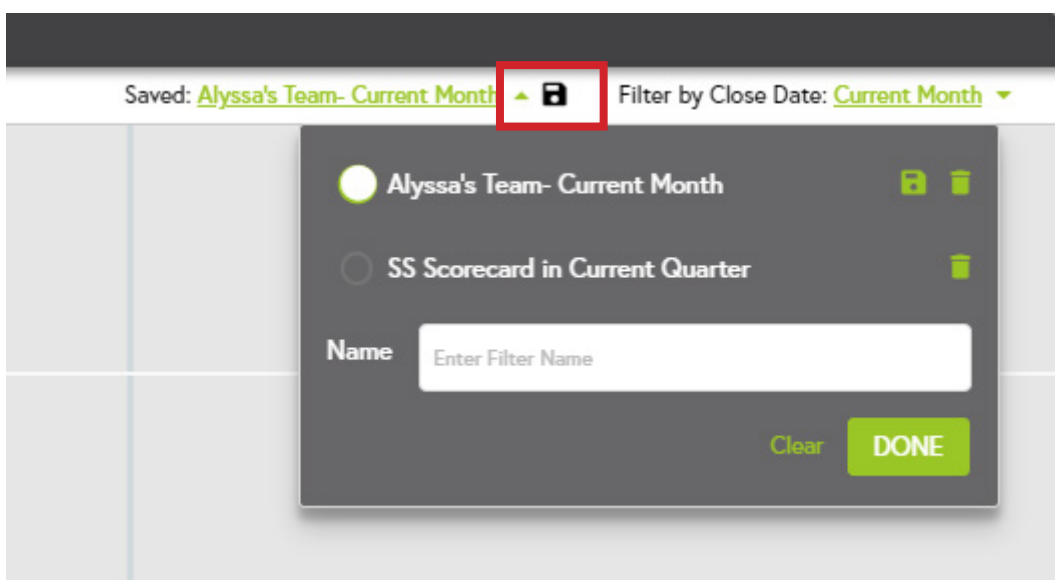
- Opportunity Name
- Revenue
- Quantity
- Close Date (ASC)
- Close Date (DESC)

The criteria for sorting include:

- Opportunity Name
- Revenue
- Quantity
- Close Date (Ascending order)
- Close Date (Descending order)
- Scorecard Score
- Account Name
- Update Time

Saving a Filter in the Opportunity List or Funnel

Filters can be saved in the opportunity list using the save (disk) icon located at the top of the opportunity list. A combination of filter criteria can be applied to the opportunity list and saved for reuse. After selecting a combination of filters ("Team," "Close Date," "Sort By" and "Show," filters), click on the "Save" icon to enter a name for the filter combination.



Type in the name of the filter and click "Done." Filter names can be edited by simply clicking in the "Name" text field, editing, and clicking "Done."

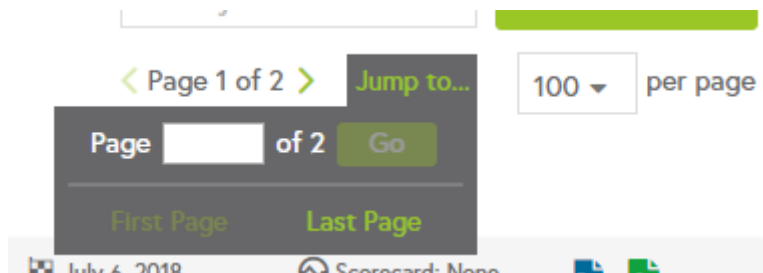
To access the saved filter, click on the drop-down next to the "Save" icon to see a list of saved filters. Select the radio button next to the desired filter view and click "Done."

Delete a saved filter by clicking on the trash can icon next to the filter name.

A filter parameter can be added to a previously saved filter by opening the saved filter, adding a new filter, and clicking "Done."

Pagination

The opportunity list can be viewed with a selected number of opportunities per page: 50, 100, or 250.



A particular page of opportunities can be selected by using the “Jump To...” option and entering the page number desired.

Filter for Opportunities in the Funnel

The Funnel can be filtered by several different filters, using almost the same criteria as the opportunity list. Filters can also be saved in the Funnel so that users can easily return to a filter setting that is used frequently, using the steps that were previously outlined.

Opportunity Criteria

☒ All
 ☐ With Blue Sheets
 ☐ Without Blue Sheets

☒ All
 ☐ With Green Sheets
 ☐ Without Green Sheets

☒ All
 ☐ Owned
 ☐ Shared

☐ Deals With Alerts

☐ Days in Stage:
 to

☐ Revenue:
 to

☐ Scorecard:

Choose

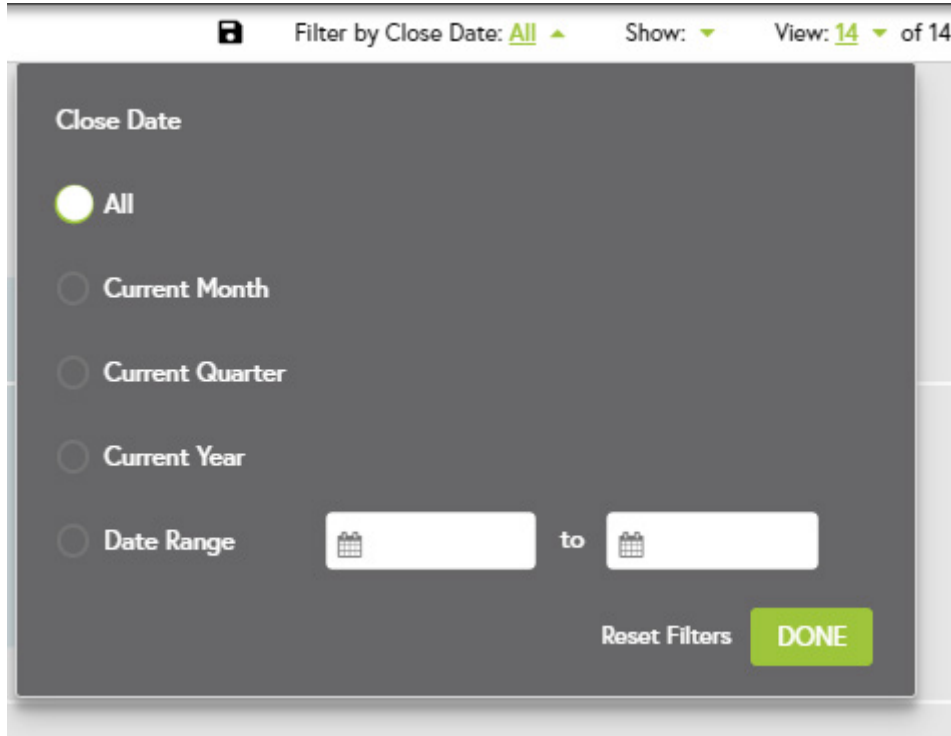
☐ Score:
 to

☐ Account:

☐ Funnel Stage:

Choose

Opportunities can also be filtered by close date using the “Filter by Close Date” filter.



Edit an Opportunity

Once an opportunity is created, the Single Sales Objective information can be edited in the Blue Sheet.

Please see the “Scout: Blue Sheet Basics” video on the Scout Support page for details on completing a Blue Sheet in Scout.

Delete an Opportunity

Customer administrators have the ability to delete opportunities.

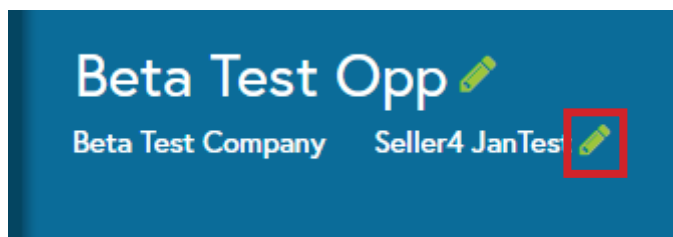
The delete function is accessed on the Blue Sheet, via the “Delete Opportunity” button.



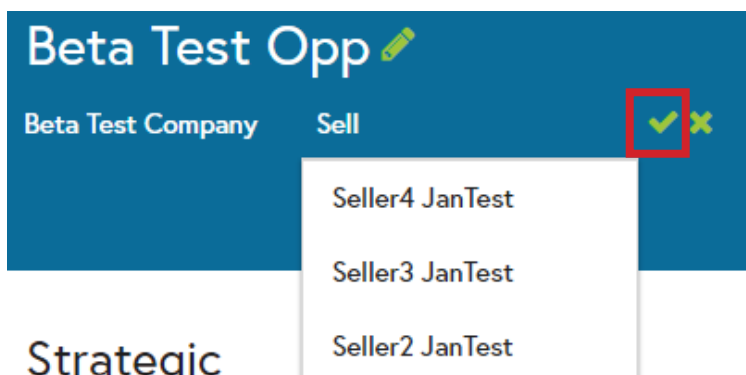
Change an Opportunity Owner

Customer administrators have the ability to change the owner of an opportunity.

To change the opportunity owner, simply navigate to the opportunity and open the Blue Sheet. Use the pencil icon next to the owner name in the Blue Sheet header to edit the name of the opportunity owner.



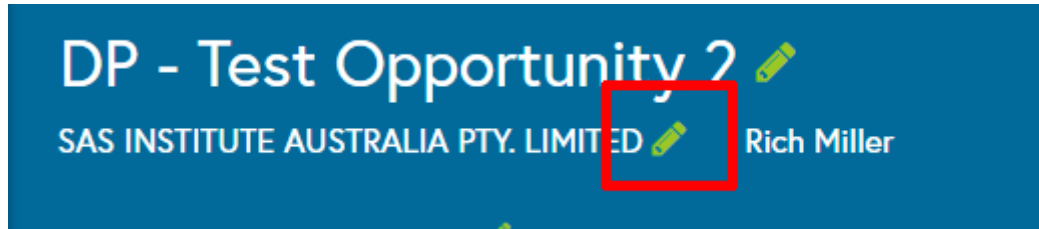
When you click into the owner name field, delete the current user name. Then type the new user's name and select it from the user list. Click the check mark to save.



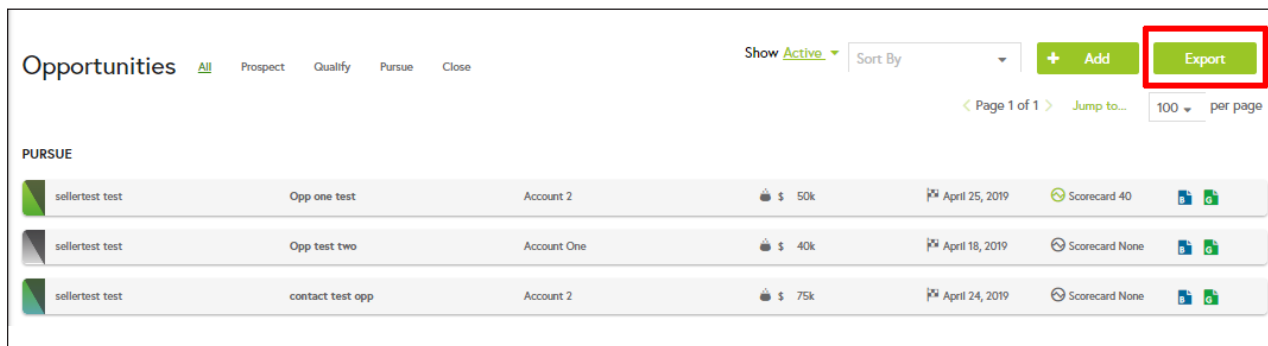
Change the Account to Which an Opportunity Is Assigned

As customer administrator, you will see a pencil icon next to the account name on a Blue Sheet. (Other users will not see the pencil icon.)

Clicking the pencil icon will allow you to change the account the opportunity is assigned to. Simply start typing the name of the account, and it will appear in the “type ahead” feature. Select the account name and then click on the check mark to save.



Export Opportunity Data



Users can export the data from the opportunity list by clicking on the “Export” button. The export will download as a CSV file, containing:

- Opportunity owner
- Opportunity name
- Account name
- Revenue
- Sales Stage
- Scorecard Score
- Close date
- Customer stated objective and evaluation

Export Funnel Data

Users can export data from the Funnel by clicking on the “Export” button. The export will download as a CSV, containing:

- Summary of all filters selected when data was exported
- Total and factored revenue
- Opportunity name
- Account name
- Revenue
- Opportunity owner
- Sales stage
- Days in stage
- Days open
- Number and type of Buying Influences
- Number of alerts
- Blue Sheet creation status

Rules

The Rules Engine has been created to extend the analytical capabilities of the Miller Heiman Group Scout application. Users can receive customized or personalized alerts, instructions, or content based on their recent interactions within Scout and from conditions satisfied within the Rules Engine.

For example, if a user selects a close date that is not within the customer-defined time period, they can receive custom content from Scout. The Rules Engine encapsulates not only the application logic, but also the creation and configuration of the conditions and resultant actions.

For detailed information on the Rules Engine, please see the “Scout Rules Engine User Guide.”

Roles

Administrators have the ability to modify the default roles or create new roles in Scout.

This provides flexibility for an organization to determine specific permission sets for specific users. For example, if you wanted to create an administrator role that did not have access to some of the tabs in the “Administration” section, you can “turn off” those permissions individually.

For detailed information on roles, please see the “Scout Roles Administrator Guide.” This can be found on the Scout Support page.

Revision History

September 2018 v1.0	First release of document.
October 2018 v1.1	Added “Editing the Fiscal Year” section; updated screenshots on pages 5, 7, 8, 9
November 2018 v1.2	updated screenshot on page 26; inserted a new page after page 20; TOC updated
January 2019 v1.3	made requested content insertions & updates
April 2019 v2.0	Made updates throughout for spring release
June 2019 v3.0	Made updates throughout for summer release



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