

Protocol for Cold Calls

Leads will be made available by brain or Samuel in the system based on industry requested by individuals making calls.

Manage Lead

[+ Add Lead](#) [Quick Entry](#) [Print](#) [Export To Excel](#) [Import Lead](#) [Delete](#)

Lead Name	Company	Phone	Primary Email	Sales Person	Status	Created Date	Action	
Unknown Unknown	Zarvou Enterprises LLC	(972) 573-5700	Not specified.	Allison Kennedy,	Not specified.	March 25, 2015	Q X	
Unknown Unknown	Zamora 7 Electric Svc	(972) 236-9341	Not specified.	Allison Kennedy,	Cold	March 25, 2015	Q X	
Unknown Unknown	Zachary Electrical							

All leads uploaded need proper Status and comments added to the lead section once a contact is made on a lead in edit section

Lead Status : *

Last Contact Date :

- Hot
- Cold
- Warm
- Contacted
- Contact in Future
- Junk Lead
- Lost Lead
- Not Contacted
- Attempted to Contact

 **Unknown Unknown**

- **Lead Details**
- Schedule Event
- Campaign
- **Comment**
- Convert Lead
- Document

Created By : Brian Cotton on March 25, 2015


Once a Lead converts to a opportunity it needs to be converted in the system as well


Unknown Unknown

- **Lead Details**
- Schedule Event
- Campaign
- Comment
- **Convert Lead**
- Document

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CRM Home screen will show all calls made on a given day(Only if they are made using sip clients or our phone system) and that is the only way for us to track progress. Dashboard allows checking voicemail, deleting voicemail and seeing list of calls where were they made ,when and how long were the calls. This portion will sync to leads, contacts and customers in the weeks to come so its important to use our system to call out.


Call Quota

Sales Commission for Jan, 2015 - Mar, 2015

From Date : 03/31/2015
Go

Call Quota -

Sales Structure :
Commission

Sales Person Type :
Residual

Commission On :
Per Invoice Payment

Commission Type :
Quarterly

Commission Tier and Territory :
Range Territory

Accelerator :
No

Total Sales Amount :
444.95 USD

Sales Commission :
88.99 USD

Target Achieved:
2%

Once a quote is created and customer is ready to move forward then quote stage needs to be changed to accepted

Subject	Quote Stage	Valid Till	Amount	Currency	Created Date	Action
test 17nov test	Created	26 Nov, 2014	95.00	USD	10 Mar, 2015	Send Quote

Entry Type: One Time

Subject: test 17nov test

Type: Customer

Quote Stage: Created

Carrier: Created

Assigned To: Marketing

Delivered

Reviewed

Accepted

Rejected

Once the quote stage is accepted then the option to convert the quote to sales order will be available

Manage Quotes » Edit Quotes

Convert to Sales Order Back

Quote Information

Entry Type: One Time

Subject: test 17nov test

Type: Customer

Quote Stage: Accepted

Customer: Abhishek Dosad

Valid Till: 2014-11-26

This will move the quote from quote section to sales order and can be accessed under the main dashboard under sales and sales order



Once a sales order is created please inform kevin to get it invoiced etc.

Sales Process is a nutshell will be

Import Leads->Cold Calls->Update Leads->Convert
Potential Opportunity->Convert Opportunity to Quote-
>Convert Quote ->Sales Order