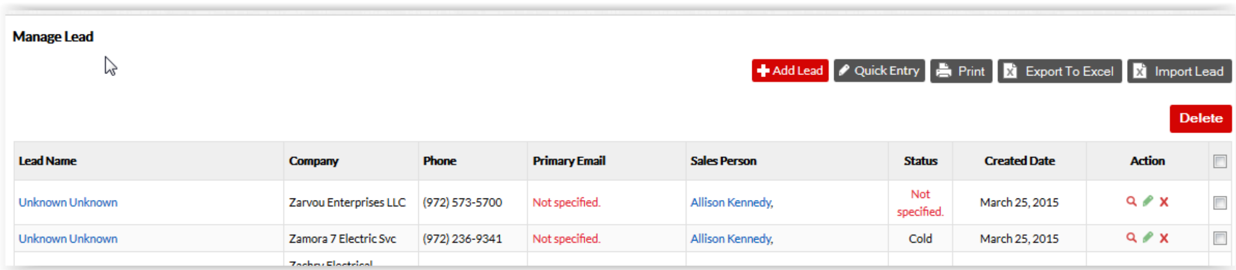
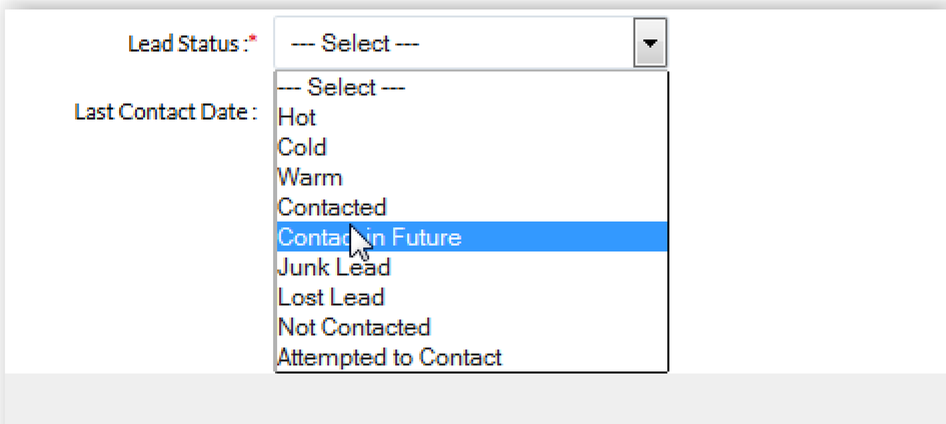
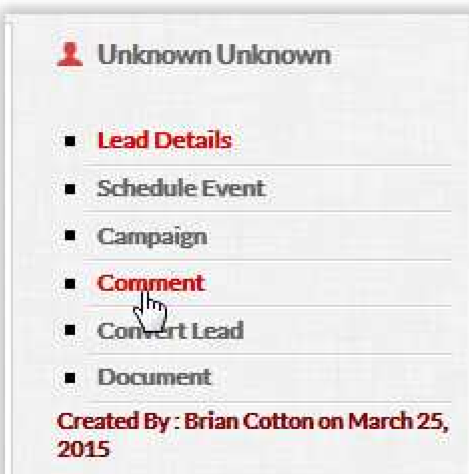
Protocol for Cold Calls

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

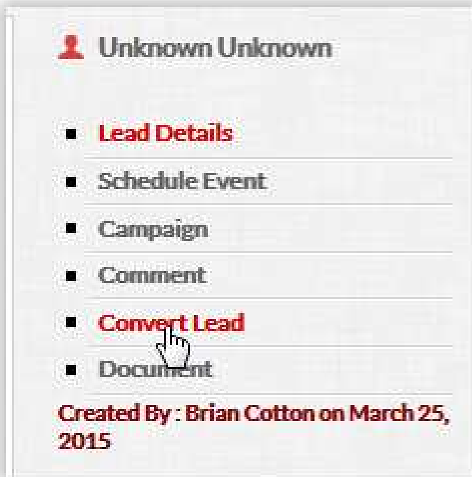


All leads uploaded need proper Status and comments added to the lead section once a contact is made on a lead in edit section

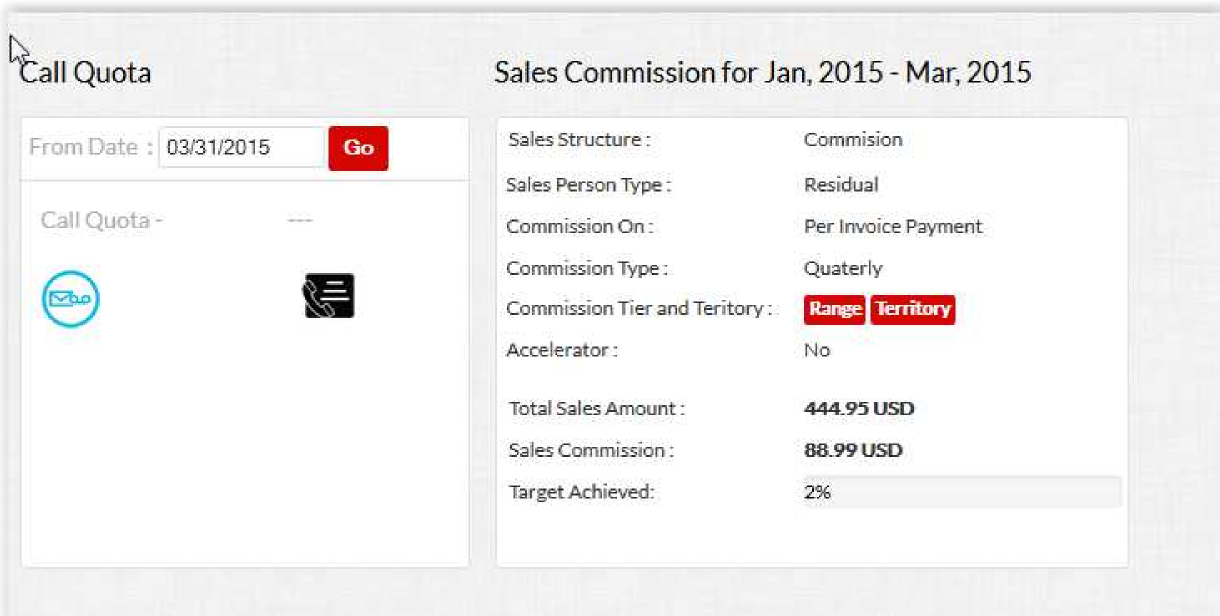




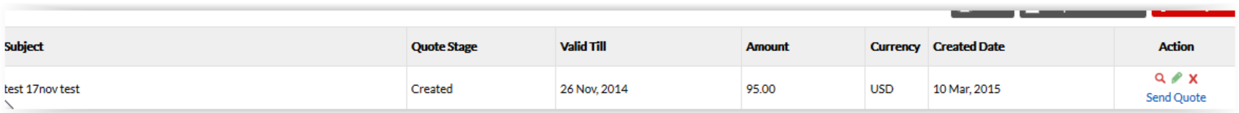
Once a Lead converts to a opportunity it needs to be converted in the system as well

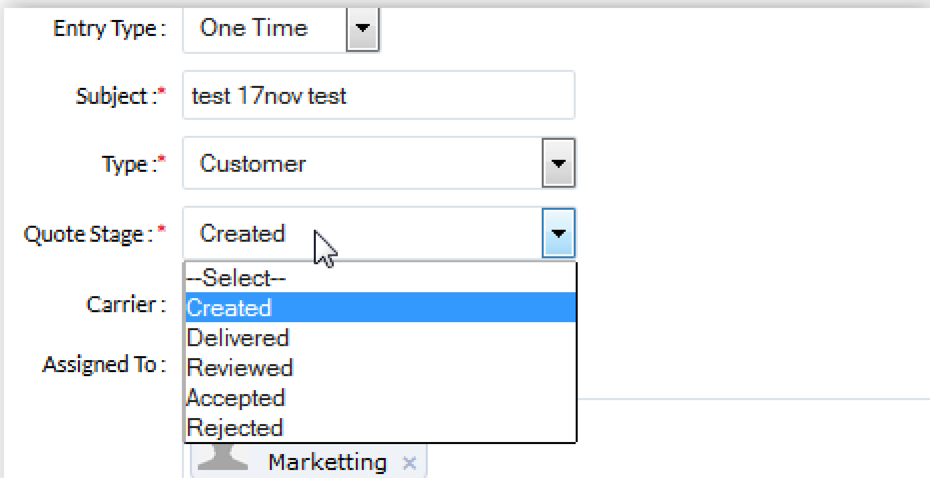


CRM Home screen will show all calls made on a given day(Only if they are made using sip clients or our phone system) and that is the only way for us to track progress. Dashboard allows checking voicemail, deleting voicemail and seeing list of calls where were they made ,when and how long were the calls.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



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





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

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