

Create an New Customer

Definitions

- **Freedom SOS CRM:** This is the site that tracks all leads and clients. The site is located at <http://dealers.freedomsos.com>.
- **System:** This refers to the **Freedom SOS CRM** website.
- **Lead:** This is a person that has shown interest in our products and services.
- **Customer:** This is a person that has purchased on of our products and services.
- **Monitored Party:** This is a person who wears the monitored device and for whom Freedom SOS is responsible to monitor.

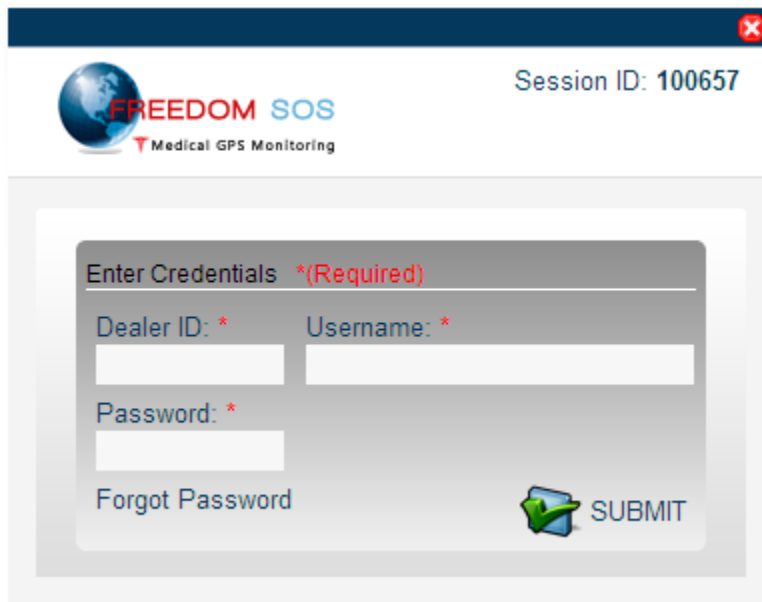
Description

This manual will describe how a user **Freedom SOS CRM** can create a new customer in the system.

Assumptions

For this user manual to work below is a list of assumptions the manual makes:

- Valid credentials to the **Freedom SOS CRM**. The user should be able to authenticate. En order to do this the user should have the following three items:
 - Dealer ID
 - Username
 - Password



Session ID: 100657


FREEDOM SOS
Medical GPS Monitoring

Enter Credentials *(Required)

Dealer ID: * Username: *

Password: *

Forgot Password

 SUBMIT

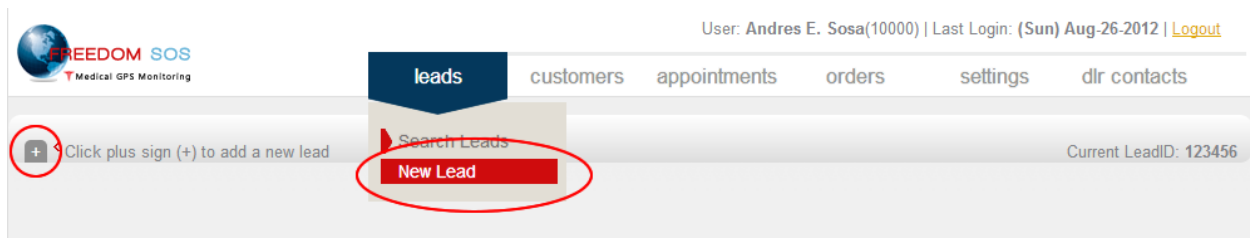
If you have forgotten your credentials to the site please contact the administrator via email. Please use the email address that you registered as a dealer.

Steps

In order to understand how things work. It must be understood that before a new customer can be created, the user must create a lead in the **System** first.

Create a Lead

There are two ways to create a lead. The first is by clicking on the New Lead from the main menu under leads. The second is from the plus sign on the tabs. See image below, the areas are circled in red.



1. Source and Disposition

Select the source of the lead and what is the leads disposition.

Drag
Window

New Lead -- Source and Disposition


Lead ID:

Source of the Lead *(Required)

Lead Source: *

Disposition: *

Date Generated: *

 NEXT

- Commision Junction
- Friend
- Internet Brochure Request
- Internet Info Request
- Mailer
- News Paper
- Radio
- Referral
- Webs

- Appointment Canceled
- Appointment Set
- Call Back
- Interested
- No Demo
- Not Interested
- Sold

Please note that the fields marked with the red asterisk (*) are required.

2. Personal Information

This section is asking for the information on the person that is interested in the system. It is preferred that the name of the person that will wear the device.

Drag Window

New Lead -- Personal Information

Lead ID: [New Lead]

Enter Personal Information *(Required) §(Business Rule 1) ‡(Business Rule 2)

Salutation:	Birth Date:	Home Phone: ‡
First Name: *		Mobile Phone: ‡
Middle Name:	Gender: *	Work Phone: ‡
Last Name: *	Male <input type="button" value="v"/>	
Suffix:	Email: §	
	Language: *	
	English USA <input type="button" value="v"/>	

PREV NEXT

Please note the Business Rule 1 and Business Rule 2.

Business Rule 1

This rule says that in order for the system to send email notifications in the event of an emergency an email is required; preferably the email of the **Monitored Party**.

Business Rule 2


In order to be able to contact the **Monitored Party** in the event of an emergency, and as a secondary backup it is required that one of the three phone fields are filled.

3. Premise Address

This is the address in which the **Monitored Party** resides. This is the preferred address; however, if the Monitored Party resides in a convalescent home then the address could be the convalescent home or a responsible party's home or PO Box.

Please be sure to enter the correct time zone that the Monitored Party is residing in. This is critical so accurate monitored event times can be calculated and reported.

Drag
Window



New Lead

Lead ID: [New Lead]

Enter Home Address

*(Required) †(Business Rules)

Address: *

Postal Code: *


Line 2:


Country: *

City: *

Time Zone: *

State: *


PREV 

 NEXT

4. Products

This step tells us what product the lead was offered. At the moment there is only one product that is offered. There will be more to come.

Drag
Window



New Lead

Lead ID: [New Lead]


Select Products Offered


*(Required) †(Business Rules)

Choose Products Offered: *

Sales Rep:

Contact Date:

PREV 

 SAVE

Once you click on the Save button the lead process for creating a lead is initiated. After a few seconds the lead record is created and opened in the main pain. A message appears and shows the Lead ID created for this record. See image below.



Behind the message is the Lead card with all the information that was just entered. Also the account is noted with newly created lead.

Freedom SOS Medical GPS Monitoring

User: Andres E. Sosa(10000) | Last Login: (Sun) Aug-26-2012 | [Logout](#)

leads customers appointments orders settings dlr contacts

John Smith (LD-3000036) + Click plus sign (+) to add a new lead Current LeadID: 1000059

Personal Information

Full Name: John E Smith
 Date of Birth: Dec/13/1986
 Gender: Male
 Language: English USA

Source: Internet Brochure Request
 Disposition: Appointment Set
 Email: smith@me.com
 Home Phone: (801) 654-6546
 Generated Date: Aug/26/2012 11:08 PM (MDT)

Home Address

Street Address: 1184 N 840 E
 OREM UT 84097
 Time Zone: Mountain Standard Time

GPS Trackers

Product: S911- Bracelet Locator-HC
 Contact Date: 2012-08-26T23:08:34.003
 Sales Rep: Andres E. Sosa

Sales Rep Information

Rep ID: SosaWISE
 Full Name: Andres Sosa
 Recruited Date: Mar/31/2012
 Email: sosawise@gmail.com
 Home Phone: (801) 226-7067
 Mobile Phone: (801) 822-9323
 Company: WISE Architects Inc

Notes And Events

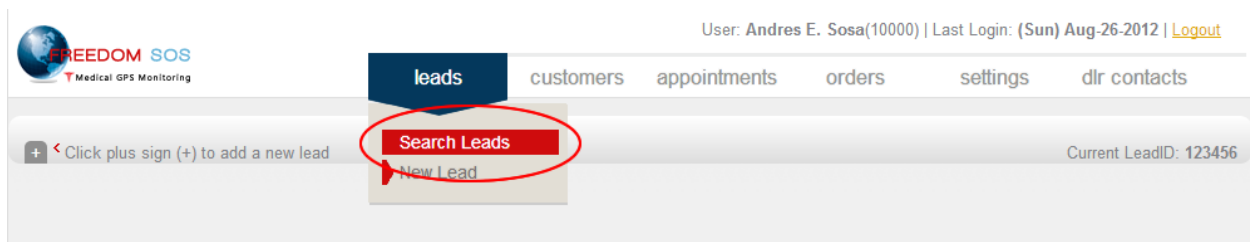
	Date Time	Entered By	Main Category	Sub Category	Description
132	Aug/26/2012 11:12 PM (MDT)	SosaWISE	Lead Access	Access Via Search	Lead was accessed.
131	Aug/26/2012 11:08 PM (MDT)	SosaWISE	Lead Access	Lead Created	Lead was created.

Create the Customer

Once the lead is created the next step is to convert the lead into a customer. In order to convert leads into a customer please follow the steps listed below:

Search the Lead

Go to the Leads search page. To do this go to the leads main menu and select the Search Leads submenu.



Enter any one of the fields to filter the result.

Lead ID	First Name	Last Name	Disposition	Source	Phone	Mobile	Work	Email
1 3000036	John	Smith	Appointment Set	Internet Brochure Request	(801) 654-6546			smith@me.com

Select the line that represents the lead that you want by clicking on it. Notice that if you place the mouse over the row it will turn yellow.

Click on the Purchase Button

Once the lead card is open, click on the Purchase button.



The conversion process begins.

1. Select Product

Select the product the new customer wants.



Select a Product for New Customer

ID: 1000059-3000036

Choose an Available Product

*(Required) †(Business Rules)

Choose a Product Offered: *

S911- Bracelet Locator-HC



Sales Rep:

Andres E. Sosa (SosaWISE)

Purchase Date:

Aug/26/2012 11:33 PM (MDT)



NEXT