



Intra Call and After Call Work

Webforms

- There are some products that require a webform for the technicians to work on it once it is sold.
- Failing to do the webform is an auto fail from QA

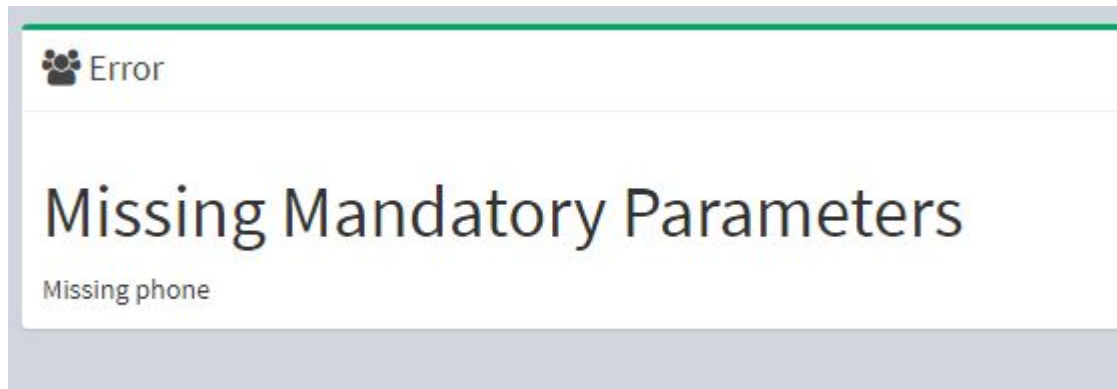
Listing Webform

- Click on the WEBFORM link just below the locked view.

	Local Time	The Customer
Active:	Yes	
Account Number:	280676 Checker	Webform
Company Name:	Williams Cleaning and Healthcare, LLC	
Account Owner:	Amber Lowe	

Listing Webform

- Sometimes clicking the webform link will show you an error. In this case, just inform your TL to have the webform loaded and all you need to do is close the tab, refresh the locked view, and try clicking on WEBFORM again.



Listing Webform

Account number: 280676 Phone: 7573764406

Client first name

Lekeisha

Client last name

Williams

Contact first name

Larry

Contact last name

Williams

1. What are all the services you offer?

Answer: Cleaning and Healthcare, House cleaning, office cleaning, Apartment cleaning, nursing services and focusing more on doctors office cleaning and move in and move out Created by: KatherineCzarinaRamos Created at: 2020-11-23 16:45:54

1.1. What services, that could be related to your line of work, you don't offer?

Answer: Csrpet Cleaning Created by: KatherineCzarinaRamos Created at: 2020-11-23 16:45:54

Activate

Listing Webform

2. Which one of these services is your main service - the one that generates you the most revenue? (If more than two are provided, please rank them from 1 to 5 where 1 is the highest importance for the customer and 5 is the lowest.)

Answer: Cleaning, nursing services, office cleaning Created by: KatherineCzarinaRamos Created at: 2020-11-23 16:45:54

3. Do you work with Residential or Commercial customers or both?

Answer: Both Residential and Commercial Created by: KatherineCzarinaRamos Created at: 2020-11-23 16:45:54 ☒ Residential customers ☐ Commercial customers ☐ Both Residential and Commercial

4. Do you work alone or do you have employees?

Answer: Has Employees Created by: KatherineCzarinaRamos Created at: 2020-11-23 16:45:54 ☐ Working Alone ☒ Has Employees

5. How many years of experience do you have in your industry?

Answer: 15 Created by: KatherineCzarinaRamos Created at: 2020-11-23 16:45:54

5.1. What year was your company founded?

Answer: 2005 Created by: KatherineCzarinaRamos Created at: 2020-11-23 16:45:54

6. Do you have any additional selling points such as: certified, bonded, insured, awards, diplomas, BBB accredited, warranties, special equipment? Give details for each of them.

Answer: certified,bonded,insured,awards,warranties Created by: KatherineCzarinaRamos Created at: 2020-11-23 16:45:54

Note: If something is wrong there will be a time frame of 24 hrs to correct the problem

☐ certified ☐ bonded ☐ insured

☐ awards ☐ diplomas ☐ BBB accredited ☐ warranties ☐ special equipment

Note

6.1. Do you have a business license? Please ask the customer to send a photo of the business license number and put in the notes how and when it will be sent.

Answer: Yes Created by: KatherineCzarinaRamos Created at: 2020-11-23 16:45:54

Note: email

☐ Yes ☒ No

Activate \
Go to Setting

Note

Listing Webform

6.2. Do you provide free estimates?

Answer: Yes Created by: KatherineCzarinaRamos Created at: 2020-11-23 16:45:54 ☐ Yes ☐ No

Note

6.3. Discounts. What kind of discounts do you offer (e.g. senior, military, new customers, referral discount)? What is the amount /percent of the discount?

Answer: senior,referral discount Created by: KatherineCzarinaRamos Created at: 2020-11-23 16:45:54

Note: senior / referral discount / 10%

☐ senior ☐ military ☐ new customers

☐ referral discount ☐ other

Note

7. Hours of operation - Do you offer emergency services, and is your business available 24/7?

Monday	from: 07:00 am to: 08:00 pm
Wednesday	from: 07:00 am to: 08:00 pm
Friday	By_appointment from: 07:00 am to: 08:00 pm

Created by: KatherineCzarinaRamos Created at: 2020-11-23 16:45:54

Monday

Type: From: To:

Tuesday

Type: From: To:

Wednesday

Type: From: To:

Thursday

Type: From: To:

Listing Webform

Friday

Type: From: To:

Saturday

Type: From: To:

Sunday

Type: From: To:

Note

8. Do you have a physical shop, offer mobile services, or both?

Answer: Mobile services only Created by: KatherineCzarinaRamos Created at: 2020-11-23 16:45:54 ☐ Physical Location/Shop only ☐ Mobile services only ☐ Both - physical location and mobile services

Note

9. What colors and font styles would you like us to use in the website?

Answer: Pink,Blue Created by: KatherineCzarinaRamos Created at: 2020-11-23 16:45:54 ☐ No preferences ☐ Green ☐ Yellow ☐ Pink ☐ Grey ☐ White ☐ Black ☐ Red ☐ Violet ☐ Orange ☐ Blue

Note

10. Do you have a picture of the company logo, before and after pictures, or pictures of your work? If yes - please send them via email.

Answer: Yes Created by: KatherineCzarinaRamos Created at: 2020-11-23 16:45:54 ☐ Yes ☐ No

Note

Activate V
Go to Settings

Listing Webform

11. What forms of payment should your business accept?

Answer: Cash Created by: KatherineCzarinaRamos Created at: 2020-11-23 16:45:54 ☐ Cash ☐ Checks ☐ Visa ☐ MC ☐ AMEX ☐ Discover ☐ Diners Club ☐ All Major CC ☐ Debit Cards ☐ Invoice ☐ PayPal ☐ Insurance ☐ Money Order ☐ Apple Pay ☐ Google Pay ☐ Venmo ☐ Cash App ☐ Worldpay ☐ SecurePay ☐ N/A

Note

12. What languages can your business accommodate?

Answer: English Created by: KatherineCzarinaRamos Created at: 2020-11-23 16:45:54 ☐ English ☐ Spanish

Note

12.1. (If Spanish is mentioned) Thank you, and what language would you prefer we use to communicate with you in the future as we also pride ourselves in being bilingual?

Answer: English Created by: KatherineCzarinaRamos Created at: 2020-11-23 16:45:54

☐ Spanish ☐ English

Notes

Submit

Custom Logo

- Create a HISTORY NOTE and click on the CUSTOM LOGO SURVEY button.

History

Save Cancel Full Form

Contact: JANE DOE

Subject: *

RM Subject Line:

Attachment: Choose File No file chosen

Note:

Related To: Account J'S PLUMBING

Assigned to: Jef Morgan

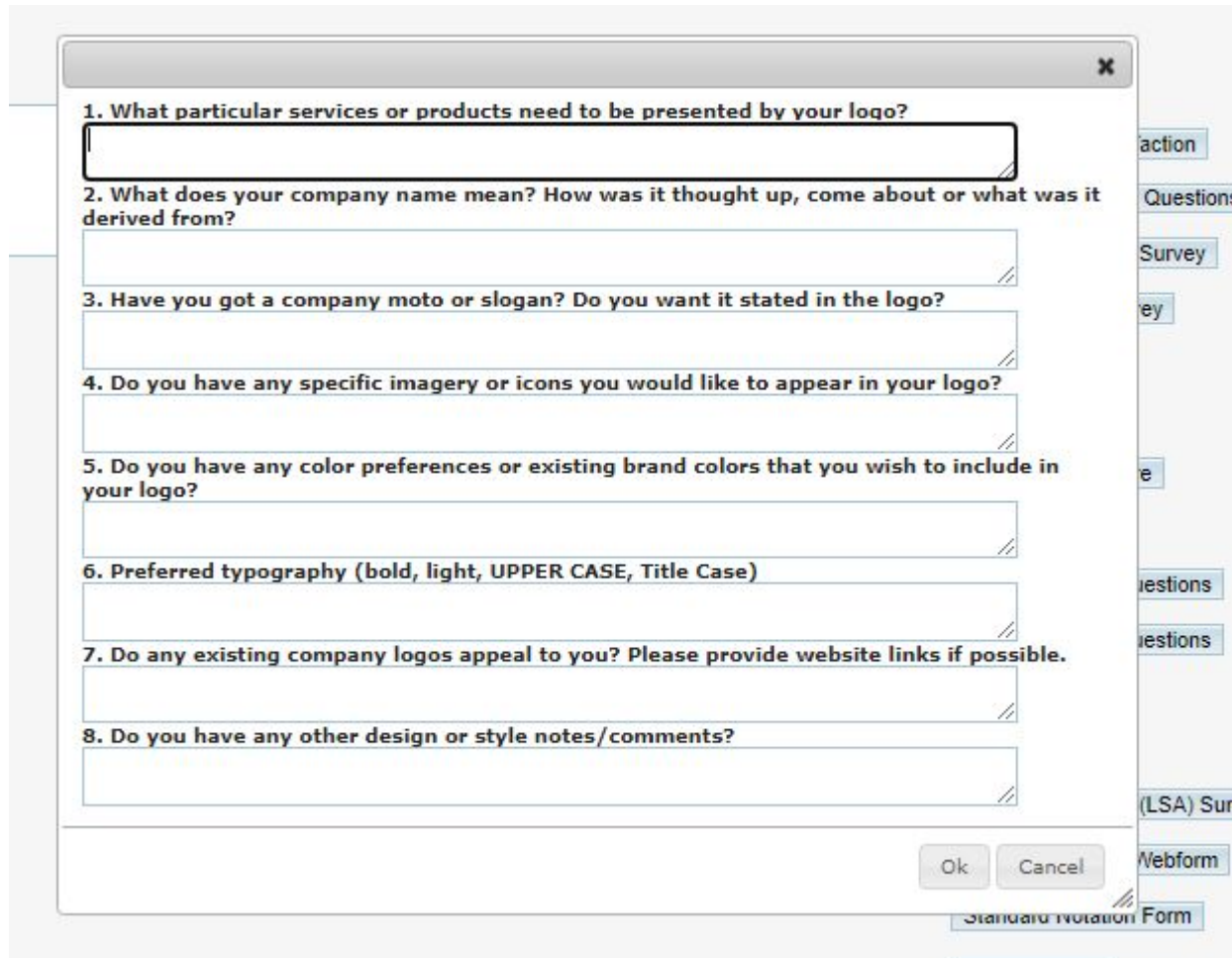
Show Web Form:

- Show Form- Satisfaction
- Account Research Questions
- Customer Attitude Survey
- Custom Logo Survey**
- Checklist
- Marketing Form
- Net Promoter Score
- WB Omotenashi
- Booking system questions
- Animated Video questions
- Coupon
- WB Sale
- Local Service Ads (LSA) Survey
- Response Scribe Webform
- Standard Notation Form
- Upsale Survey
- QA Notes (Deals)

Save Cancel Full Form

Custom Logo

- Fill in all the information and click on OK.



A screenshot of a web form titled "Custom Logo" with a close button (X) in the top right corner. The form contains eight numbered questions, each followed by a text input field:

1. What particular services or products need to be presented by your logo?
2. What does your company name mean? How was it thought up, come about or what was it derived from?
3. Have you got a company moto or slogan? Do you want it stated in the logo?
4. Do you have any specific imagery or icons you would like to appear in your logo?
5. Do you have any color preferences or existing brand colors that you wish to include in your logo?
6. Preferred typography (bold, light, UPPER CASE, Title Case)
7. Do any existing company logos appeal to you? Please provide website links if possible.
8. Do you have any other design or style notes/comments?

At the bottom right of the form are "Ok" and "Cancel" buttons. Below the form, there is a "Standard Notation Form" button. To the right of the form, a sidebar contains several buttons: "action", "Questions", "Survey", "ey", "e", "Questions", "Questions", "(LSA) Sur", "Webform", and "Form".

Custom Logo

- The information will populate in the note description section. Click on SAVE.

History

Save Cancel Full Form

Contact: JANE DOE

Subject: * Custom Logo Survey

RM Subject Line:

Attachment: Choose File No file chosen

Note: 1. What particular services or products need to be presented by your logo? - plumbing, installation, repair
2. What does your company name mean? How was it thought up, come about or what was it derived from? - based on the first letter of my name
3. Have you got a company moto or slogan? Do you want it stated in the logo? - none

Booking System


- Create a HISTORY NOTE and click on the BOOKING SYSTEM QUESTIONS button.

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Booking System

- Fill in all the information and click on OK.



The image shows a web form with a title bar containing a close button (X). The form has two text input fields. The first field is labeled "NAP" and the second field is labeled "Services". At the bottom right of the form are two buttons: "Ok" and "Cancel".

- The information will populate in the note description section. Click on SAVE.

Animated Video

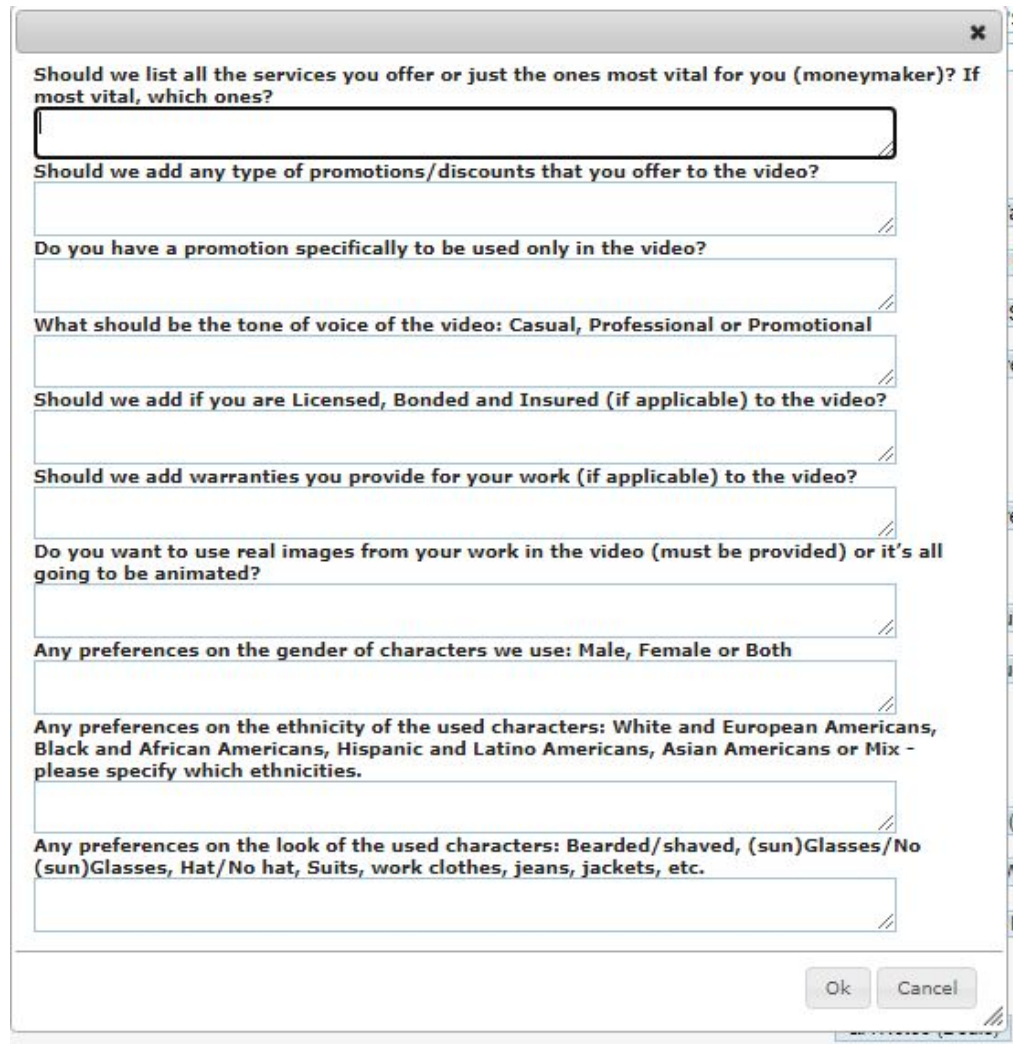
- Create a HISTORY NOTE and click on the ANIMATED VIDEO QUESTIONS button.

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Animated Video

- Fill in all the information and click on OK.



Should we list all the services you offer or just the ones most vital for you (moneymaker)? If most vital, which ones?

Should we add any type of promotions/discounts that you offer to the video?

Do you have a promotion specifically to be used only in the video?

What should be the tone of voice of the video: Casual, Professional or Promotional

Should we add if you are Licensed, Bonded and Insured (if applicable) to the video?

Should we add warranties you provide for your work (if applicable) to the video?

Do you want to use real images from your work in the video (must be provided) or it's all going to be animated?

Any preferences on the gender of characters we use: Male, Female or Both

Any preferences on the ethnicity of the used characters: White and European Americans, Black and African Americans, Hispanic and Latino Americans, Asian Americans or Mix - please specify which ethnicities.

Any preferences on the look of the used characters: Bearded/shaved, (sun)Glasses/No (sun)Glasses, Hat/No hat, Suits, work clothes, jeans, jackets, etc.

Ok Cancel

- The information will populate in the note description section. Click on SAVE.

Coupon Functionality

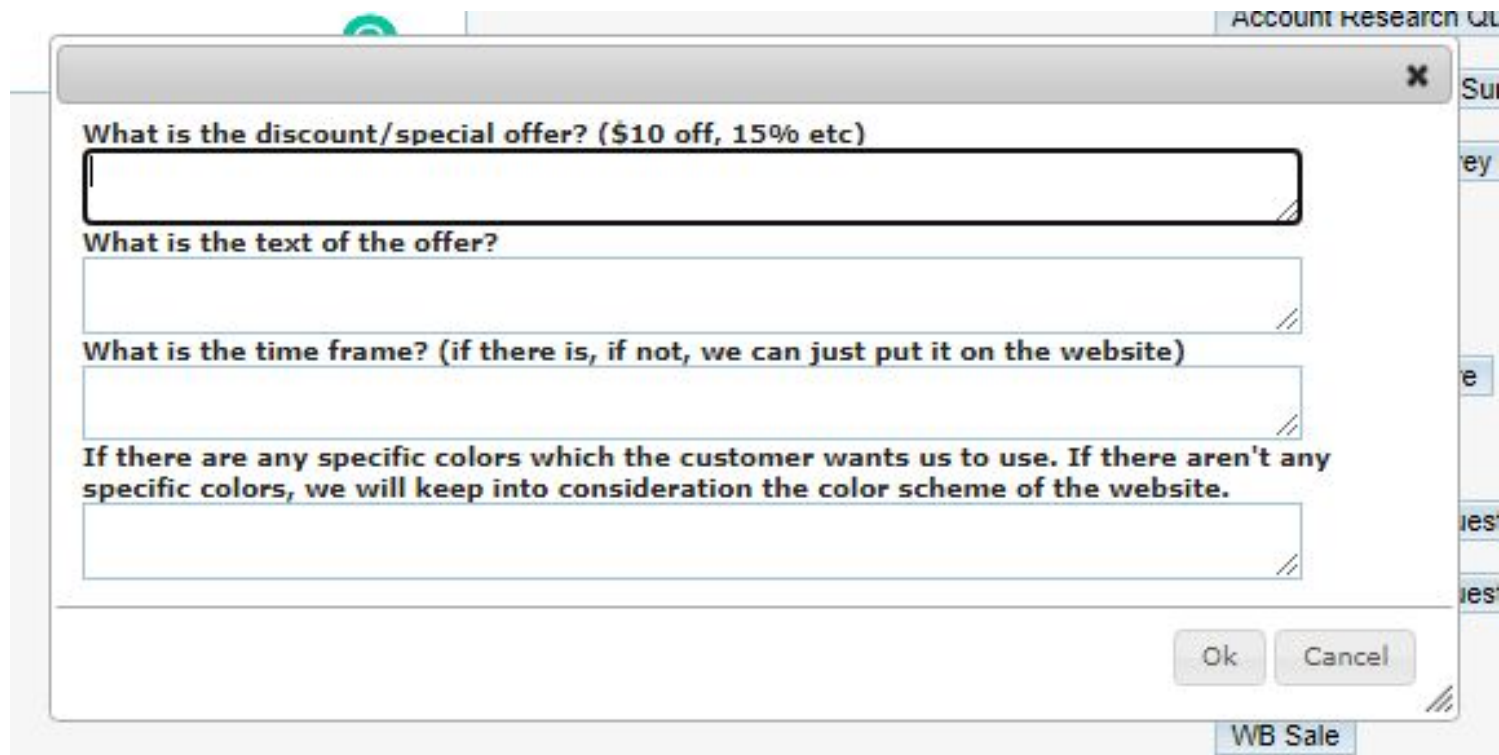
- Create a HISTORY NOTE and click on the COUPON button.

Show Web Form:

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Coupon Functionality

- Fill in all the information and click on OK.



A screenshot of a web browser window showing a dialog box for creating a coupon. The dialog box has a title bar with a close button (X). It contains four text input fields with the following labels:

- What is the discount/special offer? (\$10 off, 15% etc)
- What is the text of the offer?
- What is the time frame? (if there is, if not, we can just put it on the website)
- If there are any specific colors which the customer wants us to use. If there aren't any specific colors, we will keep into consideration the color scheme of the website.

At the bottom right of the dialog box are two buttons: "Ok" and "Cancel". Below the dialog box, in the browser window, is a button labeled "WB Sale".

Coupon Functionality

- The information will populate in the note description section. Click on SAVE.

Response Scribe

- Create a HISTORY NOTE and click on the RESPONSE SCRIBE WEBFORM button.

Show Web Form:

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Response Scribe

- Fill in all the information and click on OK.

Customer Attitude 2

1. Do you have a facebook page for your business. (if yes, do you want us to respond to the reviews there). In case the customer want us to respond to the facebook reviews the agent should tell the customer that we will need managerial access to the facebook page and that we will send email with instructions how to give us access.

2. Do you have yelp, homeadvisor? Do you want us to reply the reviews there? In case yes, the customer should give us the login credentials.

Ok Cancel

Coupon

- The information will populate in the note description section. Click on SAVE.

- Just like webforms, tickets are needed by the technicians to work on products once it is sold.
- Failing to create a ticket is an auto fail from QA

Tickets

Ticket for	Assign to	Ticket Template
Sold Listing	Advertising	<p>1.) Please hide address - (type in the complete address here with zipcode)</p> <p>2.) Please purchase CF with call answering service</p> <p>3.) For webform - copy all the information from this account number (type in the main account number here)</p> <p>Thanks.</p>
Sold Listing if you offered discount	Accounting	Please provide 50% MRC discount for three months (December, January & February). Reason for discount: existing customer discount. Approved by Geo. Thanks.
Prepay CAS	Accounting	Please move the first billing date of this deal number (type in the CAS deal number here) to (type in the first MRC billing date of CAS) because customer is still under the free trial of call answering service. Approved by Geo. Thanks.
Referral Discount	Accounting	Please provide 50% MRC discount for 1 month (November). Reason for discount: customer referred this new customer (type in the new account number here). Approved by Geo. Thanks.
New Customer Discount	Accounting	Please provide 50% MRC discount for 1 month (November). Reason for discount: new customer. Approved by Geo. Thanks.
Sold 2 Corporate Email	Advertising	<p>- Customer purchased 2 corp emails</p> <p>- Please create 2 corp emails with the username below:</p> <p>1.) customer'schoice@domain.com</p> <p>2.) contactus@domain.com</p> <p>- Please update the contact form once the corp email is done & have it display on the website.</p>
Sold Custom Logo	Adwords (TT Type: Create Logo)	Custom Logo Survey done, please create one. Thanks.

Tickets

Sold Booking System	Advertising	Booking system questions done. Please create one and upload it on our website and google listing. Thanks.
Sold Animated Video	Advertising	Animated video questions done. Please create one and upload it on our website. Thanks.
Sold Coupon	Advertising	Coupon webform done. Please create one and upload it on our website. Thanks.
Sold Blogging	Advertising	Customer purchased Blogging deal. Please create one and upload it on our website. Thanks.
Sold Photos	Advertising	Cust purchased additional 30more photos. Please upload it on the homepage of the website. As per customer he will just send the photos via email. Thanks
Website Domain Name Purchased	Advertising	Customer purchased website domain. Please transfer the ownership to the credentials below: Godaddy account ID or customer ID: Email address: Thanks.
Sold Chat Functionality	Advertising	Customer purchased chat functionality. Please add it on the website and this is the customer's mobile phone number _____. Thanks.
Sold Mirroring of website	Advertising	Customer purchased mirroring of website. Please mirror this website _____. Thanks.
Sold Job Application	Advertising	Customer purchased job application form deal. Customer will send the information needed for the job application via email. Please upload it on the website so that his applicants can upload resume. Thanks.
Sold 5 images slider on the website	Advertising	Customer purchased 5 images slider on the website. Kindly add it on the homepage of the website. Customer will just send the 5 photos via email. Thanks.

Tickets

RM / RS / ORM bundle TT template:

Sold Review Management	Link Building	Customer purchased online review manager, please send login credentials to (type in the customer's email address here). Thanks.
Sold Response Scribe	no TT needed	no TT needed
Sold ORM (bundle)	Link Building	Customer purchased online review manager, please send login credentials to (type in the customer's email address here). Customer purchased response scribe. Webform done. Thanks.

History Notes

CRM disposition (subject line)	When to use it:
SOLD/Account number	sold deal
UPSELL/Account number	pitch for any product but customer declined (no more pending callback)
NURTURE/Account number	pitch for any product but pending for callback
CR/Account number	wasn't able to pitch for any product at all
VM/Account number	voicemail / mailbox not set up / no answer / auto hang up
S2R/Account number	sent to retention
XFER/Account number	transfer to another team member / department

OPPORTUNITIES:

- Created to track and determine ownership on nurtured accounts
- Created for each product pitched
- Go to the OPPORTUNITIES section and click on CREATE.

Opportunities	
Create	
Name	Sale
No Data	

OPPORTUNITIES:

Fill in the following:

- Opportunity Name: Product-Weak/Strong. eg. Listing-Weak
-Weak- nurtured but cust has not really decided yet, needs callback for follow up
-Strong - Runcard
- Product: Select the CRM Deal Product Name
- Deal Stage: Pending if it is still nurtured, Closed if it was already sold, and Not interested if customer declined.
- Expected Close Date: Schedule it 10 business days from today.
- Type: Choose Upsales Opportunity

The screenshot shows a CRM 'Opportunities' form. On the left, the 'Opportunity Name' field is highlighted with a red box and marked with a red asterisk. Below it, the 'Product' dropdown is highlighted with a red box. Further down, the 'Sales Stage' dropdown is highlighted with a red box and marked with a red asterisk. On the right, the 'Account Name' field is highlighted with a red box and marked with a red asterisk. Below it, the 'Expected Close Date' field is highlighted with a red box. Further down, the 'Type' dropdown is highlighted with a red box. The form includes buttons for 'Save', 'Cancel', and 'Full Form' at the top and bottom. The 'Assigned to' field shows 'Jef Morgan'.

Opportunities

Save Cancel Full Form

Opportunity Name: *

Currency: US Dollars : \$

Product:

Pitch Price:

Sales Stage: *

Next Step:

Account Name: *

Expected Close Date:

Type:

Lead Source: Customer Service

Assigned to: Jef Morgan

Save Cancel Full Form



Questions?