



CRM Navigation:

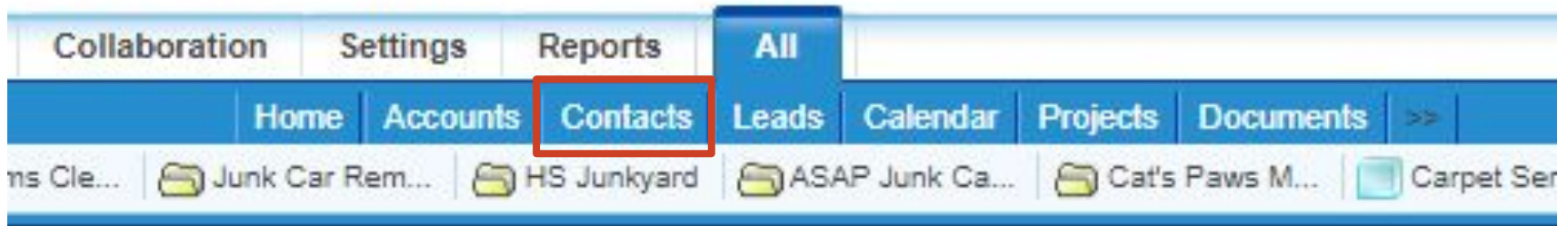
Creating a Contact

CREATING A CONTACT

- This is done when we are creating a new account for a new customer.
- Make sure that there is no existing account associated with that contact yet.
 - Try searching for an account using the customer's details. (Name, Phone Number, Email, or Company Name)

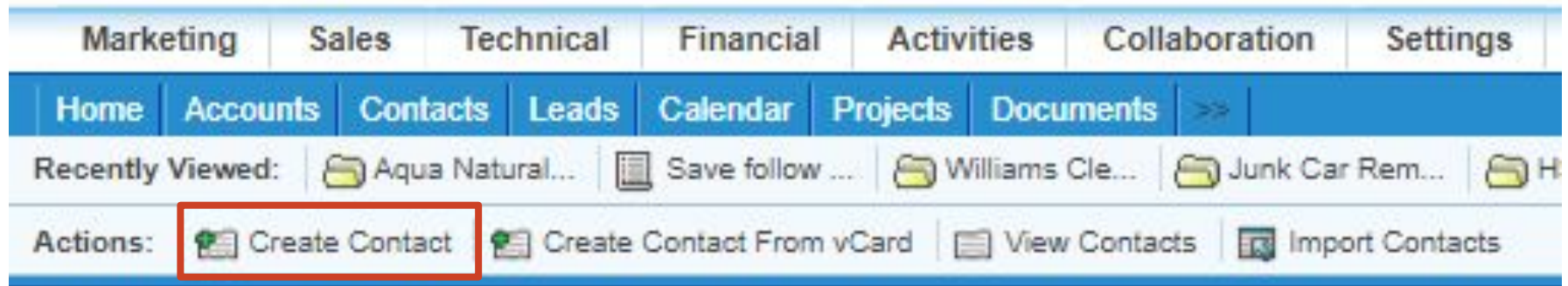
CREATING A CONTACT

1. In your CRM Menu Bar, hover your mouse pointer over ALL and click on CONTACT in the submenu.



CREATING A CONTACT

2. Click on CREATE CONTACT in the ACTIONS section.



Search Contacts

CREATING A CONTACT

3. Enter the customer's NAME, PHONE AND EMAIL and click on SAVE.

Create

Save Cancel

Overview

Contact Owner: Jef Morgan

First Name: * Ms. JANE

Title:

Phone: * 8663910622

Mobile:

Fax:

Email: + JANE.DOE@GMAIL.COM Primary Opted Out Invalid

Mailing Street:

Mailing State:

Primary Address City:

Primary Address State:

Deal: ☐

Referral Leads:

Preferred Language: English

NCH Referral Leads:

Account Name:

Last Name: * DOE

Alternative Contact:

Other Phone:

Contact Number:

Extra Phone Number:

The Date:

Mailing City:

Mailing Zip:

Primary Address Postal Code:

Primary Address

Primary Address Street:

Primary Address City:

Primary Address State:

Primary Address Postal Code:

Primary Address Country:

CREATING A CONTACT

4. If there are similar names, a reminder will show on the next page. Just click on save if you're sure that cust does not have an existing account yet. You will then be directed to the contact page where you can create an account.

Save Contact

The contact record you are about to create might be a duplicate of a contact record that already exists. Contacts records containing similar names are listed below.

Click Save to continue creating this new contact, or click Cancel to return to the module without creating the contact.

Save	Cancel
First Name	Last Name
Jane	Doe
Save	Cancel

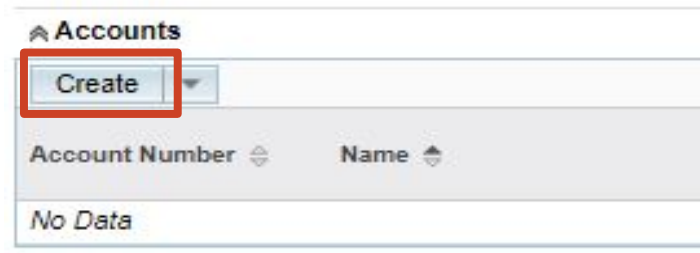


CRM Navigation:

Creating an Account

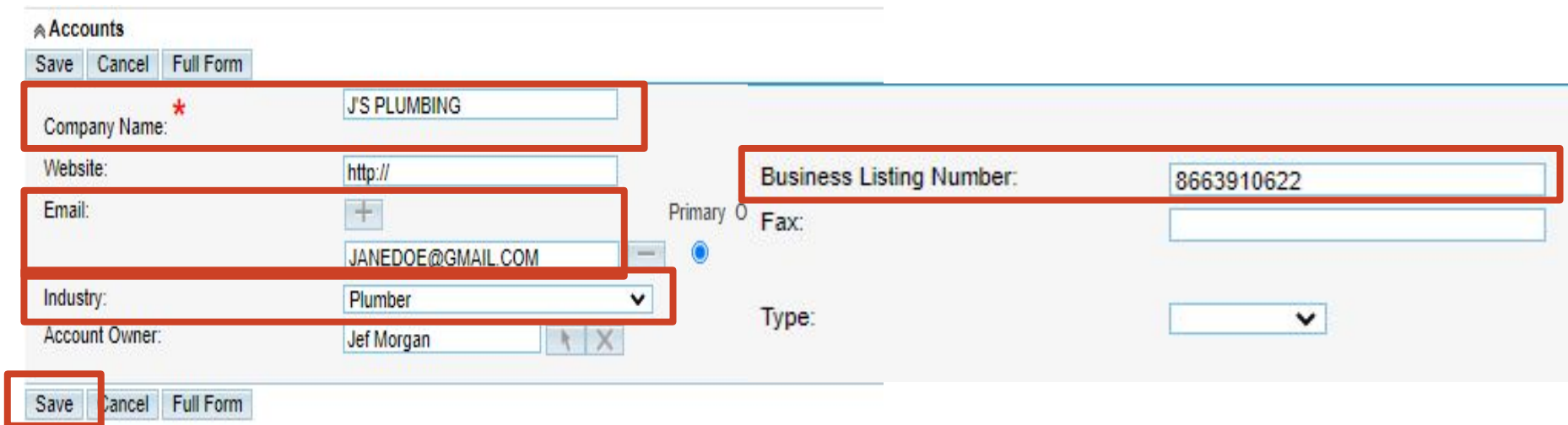
CREATING A CONTACT

1. Open the CONTACT page, scroll down to the ACCOUNTS SECTION. Click on CREATE.



A screenshot of a web interface showing the 'Accounts' section. A table with columns 'Account Number' and 'Name' is visible, containing the text 'No Data'. A 'Create' button is highlighted with a red rectangular box.

2. Fill in the COMPANY NAME, EMAIL, PHONE AND INDUSTRY then click SAVE.



A screenshot of a web form for creating an account. The form includes fields for 'Company Name' (J'S PLUMBING), 'Website' (http://), 'Email' (JANEDOE@GMAIL.COM), 'Industry' (Plumber), 'Business Listing Number' (8663910622), 'Fax', and 'Type'. The 'Save' button is highlighted with a red rectangular box. The form also includes 'Cancel' and 'Full Form' buttons.

CREATING A CONTACT

3. You should now be able to see the new account you created with the account number. Clicking on the ACCOUNT NAME will route you to the account locked view.

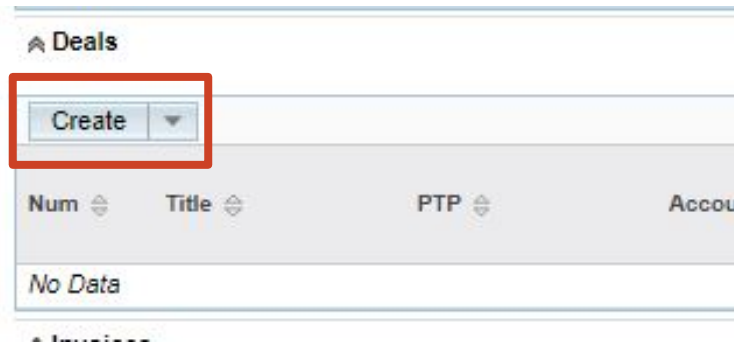
Accounts			
Create ▾			
Account Number	Name	Active	Customer Status
283121	<u>J'S PLUMBING</u>	No	New Customer



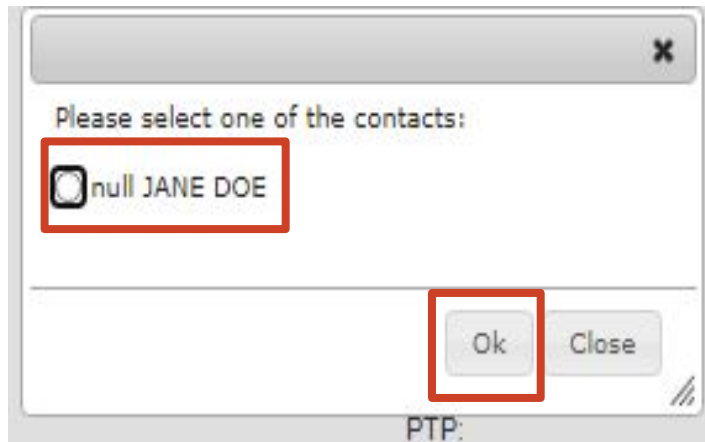
CRM Navigation: *Creating a Deal*

CREATING A DEAL

1. In the ACCOUNT page, scroll down to the DEALS section. Click on CREATE.



2. Select the CONTACT NAME and click on OK.



CREATING A DEAL

3. Enter the OPENERS name and YOUR NAME AS THE CLOSER. Tick the AGREEMENT RECEIVED button.

^

Title: * J'S PLUMBING

Cancel Date:

Valid Until: 01/18/2021

Assigned to: Jef Morgan

Billing State:

Approval Status: Approved

Opener: * Jef Morgan

Next Billing Date:

Quality Assurance:

Opportunity Name:

Promo Offer: * No Promo Offer

Agreement Received: ☒

Team Member Name:

Approval Issues:

Closer: * Jef Morgan

PTP:

CREATING A DEAL

4. Highlight the OFFICIAL DEAL TEMPLATE OLD ONE from the Deal template section and click on ADD A PRODUCT LINE.

Deal Template: *

- PPC
- SA Forgiveness
- Active Website SA
- Official Deal Template Old one
- Official Deal Template

▲ Purchasing Services

Purchasing Services: *

Add Product Line

Save Cancel

CREATING A DEAL

5. Enter the product with the set up fee and MRC. Then click on save.

▲ Purchasing Services

Purchasing Services: *

Product	Set Up	Recurring (USD \$)	Unit (USD \$)	Total (USD \$)	Total Setup
Online Presence Pack	1.00	99.99	99.99	99.99	1.00

Note :

Add Product Line

Save Cancel

CREATING A DEAL

6. To send the service agreement, click on the dropdown button beside the edit button on the upper left section. Click on SEND SMS.

J'S PLUMBING

Edit	Send Checkout Email	Send Checkout Email 1	Send C
------	---------------------	-----------------------	--------

Duplicate

Print as PDF

Email PDF

Send I Agree Email

Create Contract

Convert to Invoice

Send SMS

Send Yearly Renewal SMS

Send Calls Agreement SMS

View Change Log

Agent Passed:	
Rep fixed by:	
Title:	J'S PLUMBING
Assigned to:	Jef Morgan
Valid Until:	01/18/2021
Deal Stage:	Inactive
Team Member Name:	
Approval Status:	Approved
Account:	J'S PLUMBING
Waive Final Bill:	<input type="checkbox"/>
Opener:	Jef Morgan
Manager Opener:	Geo Anico
Current Billing Date:	

CREATING A DEAL

7. Make sure that the phone number is correct before hitting on SEND.

Create

Send Cancel

Contact: * JANE DOE [icon] [icon]

Phone: * 8663910622

Setup Fee: 1.00

Message: You agree to purchase services from 411 Locals for \$1.00 non-refundable setup fee. \$99.99 monthly fee is due in 30 days. Terms at <http://bit.ly/411Locals>

Deals: J'S PLUMBING [icon] [icon]

Assigned to: Jef Morgan [icon] [icon]

Recurring Fee: 99.99

Switch to Spanish Version

Checked: ☐

Send Cancel

Once you receive the I agree from the customer, you can proceed to the verification script. Once done, you can then charge the card.

CREATING A DEAL

8. You'll be routed to the DEALS page where you can process the payment for the deal

example:	invoice example		
	Product Name	Quantity	Setup Fee
	Online Presence Package B	1	\$1.00
	Total: \$1.00		

Sale:

Select a payment type	<input type="text" value="Credit card"/>
Credit Card Number*	<input type="text"/>
Expiration Date (ie. 0716 = July 2016)*	<input type="text"/>

**BUT FIRST, YOU HAVE TO GET THE CUSTOMER'S AGREEMENT
AND READ THE NECESSARY VERIFICATION SCRIPT!!!**



Questions?