

# Closing Unsuccessful Proposals (Cold)

Find the 'Outstanding Proposals' tab near the bottom on the left side of the screen.

Select 'List'

www.windowizard.co.nz/sales/proposals/?st=jeremy

Date of Call	#	Customer	Job No	Address	Phone	Assigned To	Actual Call Date	Sales Value
21/11/2014	210	Ms Tricia Tawin	Test			nigelb		
19/11/2014	222	Ms Tricia Tawin	practice	5 Kotzikas Place	0292001550	kath	Thu 20 Nov (12:00-13:00)	
18/11/2014	210	Ms Tricia Tawin	Job1			kath		
14/11/2014	223	Mr pearl blog	blog 3	45 Puniri Street		karenj		
11/11/2014	228	Miss Kathryn boyte	test	145 Rangitikei Street		kath	Wed 12 Nov (10:00-11:00)	
11/11/2014	227	Ms Steve Brown	SteveD	36 Cameron Road		steved	Tue 11 Nov (15:30-16:30)	
07/11/2014	225	Mr Ian Veint (1)	123	5 Kotzikas Place		ianv	Fri 07 Nov (10:00-11:00)	\$1,000
06/11/2014	224	Miss Tricia Tawin (MCP)	Friday task	Kahu Street	0800262620	triciat	Fri 14 Nov (10:00-11:00)	
28/10/2014	53	Mr Andy grinder	Grinder#2	Chesham Rd		hugovs		
23/10/2014	218	Mr Jo Brown	Brown	34 Graham Place	075700000	kath		
23/10/2014	220	Mr James Bond	JOB007	246 Charleston Street	027555007	andrew		
16/10/2014	1	Mrs Jeremy page	test:ineing Interchange	Three Springs Rd		jeremy		
15/10/2014	56	Mr jeremy page	PageJ	5 Glebe Close		steved		\$2,500
22/09/2014	215	Mrs Sandra Rowlinson	test	1/681 Poutakataka Road		andreim		
12/09/2014	15	Mr ian vient	12345/ian	97 Tanner St		kath	Thu 11 Sep (11:00-12:00)	
12/09/2014	140	Ms Kath boyte	copy 2 Boyte	6 Mokokuna Grove		kath		
11/09/2014	140	Ms Kath boyte	123456	6 Mokokuna Grove	021841706	brennap		
02/09/2014	209	steph adding	adding	8 cecil road,	0211506160	peter		
01/09/2014	56	Mr jeremy page	test5	5 Glebe Close		andreim		
28/08/2014	129	Serious Sam	Hey	28 Danger Lane		andrew		
11/08/2014	207	Ms Kath boyte	Boyte123	Thorndon Quay		kath	Tue 12 Aug (10:00-11:00)	

The list of proposals will be displayed,

The system will automatically default to the persons list that is logged in, if you want to change person, click on the 'Consultant Filter' drop down box and select relevant name, this persons list will then be displayed.

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Date of Call	#	Customer	Job No	Address	Phone	Assigned To	Actual Call Date	Sales Value
16/10/2014	1	Mrs Jeremy page	test:ineing Interchange	Three Springs Rd		jeremy		
10/03/2014	191	Mr tara test	tara 2	5 Kotzikas Place		jeremy		
12/02/2014	194	Mr Andy Training	Test	35 Honeysuckle		jeremy		
20/12/2013	121	Mr Steven McGinness (MCP NZ)	test	3/3 London St	0800 262620	jeremy		
30/05/2013	137	Mr jeremy page	test	14 Arawa Street		jeremy		
07/06/2012	112	Mrs jo page	privacy Blinds	14 Cassidy Ave	3253421	jeremy		
26/01/2012	19	Mr Nigel Burson	Test	5 Kotzikas Pl	039628510	jeremy		
19/12/2011	60	Mr Aimee Page (Fairlie construction)	School	School Rd		jeremy	Tue 20 Dec (13:00-14:00)	\$5,000
03/12/2011	1	Mr Jo page	test22	5 Glebe Close		jeremy		
05/10/2011	46	Mrs Vicky muru	bedroom3	73 Brooker Ave		jeremy	Thu 06 Oct (12:30-15:00)	\$6,000
30/09/2011	43	Ms Charlotte Page	Australia	Three Springs Rd		jeremy		
30/09/2011	43	Ms Charlotte Page	bedroom	Three Springs Rd		jeremy		\$500
21/09/2011	43	Ms Charlotte Page	test5	Three Springs Rd		jeremy		
21/09/2011	43	Ms Charlotte Page	tesandrew	Three Springs Rd		jeremy		
25/05/2011	26	Mr Page JHeremy	Test for Andrew	5 Glebe Close		jeremy	Fri 27 May (14:00-17:00)	\$5,000
03/05/2011	6	Mrs densie burson (Adobe Builders)	Denise	23 Muntai Crescent	03 8704327	jeremy	Thu 05 May (11:00-13:00)	
30/03/2011	12	Mr & Mrs A&B Bosch	Bosch	264 Lowes Rd	3698741	jeremy		\$1,500

To close a proposal, select the **red X symbol** on the right hand side next to the 'Sales Value' column

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Jeremy Page WindowOnLine LOG OUT

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Consultant Filter: jeremy

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20/12/2013	121	Mr Steven McGinness (MCP NZ)	test	3/3 London St	0800 262620	jeremy			✖ ✖
30/05/2013	137	Mr jeremy page	test	14 Arawa Street		jeremy			✖ ✖
07/06/2012	112	Mrs Jo page	privacy Blinds	14 Cassidy Ave	3253421	jeremy			✖ ✖
26/01/2012	19	Mr Nigel Burson	Test	5 Kotzikas Pl	039628510	jeremy			✖ ✖
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30/03/2011	12	Mr & Mrs A&T Bosch	Bosch	264 Lowes Rd	3698741	jeremy		\$1,500	✖ ✖

Select a reason from the drop down box and then select 'Cold'

You will then be taken back to the previous screen

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03/05/2011	6	Mrs densie burson (Adobe Builders)	Denise	23 Munitai Crescent	03 8704327	jeremy	Thu 05 May (11:00-13:00)		✖ ✖
30/03/2011	12	Mr & Mrs A&T Bosch	Bosch	264 Lowes Rd	3698741	jeremy		\$1,500	✖ ✖

Cold? Please select a reason... Cold Go Back