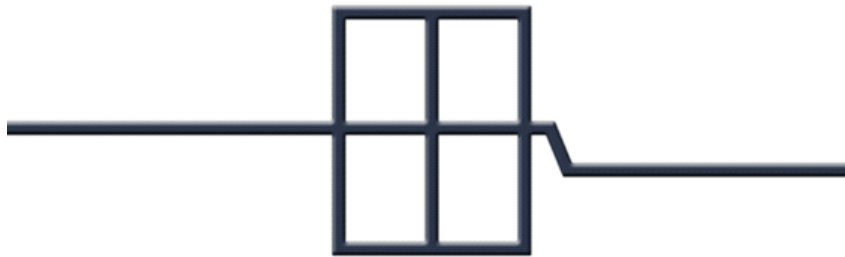


Training Manual for Sales Manager



Sales Manager

Create a new sales lead

Select '**Orders**' tab

On the left side, select '**Client Proposal**'

The screenshot shows the Windowizard 2.0 website interface. At the top, there is a logo and the text 'windowizard 2.0' and 'www.windowizard.co.nz'. On the right, there is a user profile 'Kath (MCP NZ Ltd) WindowOnLine' and a 'LOG OUT' button. Below the header is a navigation bar with tabs: 'Home', 'My Account', 'Products', 'Orders', 'Resources', 'Sales Manager', and 'About Us'. The 'Orders' tab is selected. On the left, there is a sidebar with 'My Orders & Proposals' and 'Client Proposal' (indicated by an arrow). The main content area shows 'MCP New Zealand Ltd Orders' with a table of statistics: Sent Orders (32), Saved Orders (285), and Order Templates (2). Below this is 'Windowizard Proposals' with a table: Saved Proposals (77), Previous Proposals (317), and Sent Orders Queue (0). At the bottom, there is a 'Freight Tracker' link.

A window will pop up; enter client details in relevant boxes. Once you have entered an address, select '**Search**' and select correct address

The screenshot shows the Windowizard 2.0 website with a 'Details' pop-up window open. The window has a 'Contact' dropdown set to 'Ms', a 'Telephone' field with '0800262620', a 'Cust No.' field, and an 'Account Name Business' field. There are 'New Lead', 'Save', and 'Close' buttons. The 'First Name' field contains 'test' and the 'Email' field contains 'test@windoware.co.nz'. The 'Surname' field contains 'test' and the 'Mobile' field is empty. The 'Address' field contains '5 Kotzikas Place Christchurch'. A 'Search' button is highlighted with an arrow, and a 'validate address now' button is visible below it. The 'Notes' field is empty. Below the 'Details' window is a 'Map' section with a 'History' button.

windowizard 2.0 Kath (MCP NZ Ltd) WindowOnLine **LOG OUT**

Details

Contact: Ms Telephone: 0800262620 Cust No.:
 First Name: test Email: test@windoware.co.nz Account Name Business:
 Surname: test Mobile:
 Address: 5 Kotzikas Place Christchurch **Search**
 Notes:
 Select Address: 5 Kotzikas Place, Wigram, Christchurch 8042, New Zealand
Map
History

Once you have selected the correct address, select the map button if you want to see where the property is located

windowizard 2.0 Kath (MCP NZ Ltd) WindowOnLine **LOG OUT**

Details

Contact: Ms Telephone: 0800262620 Cust No.:
 First Name: test Email: test@windoware.co.nz Account Name Business:
 Surname: test Mobile:
 Address: 5 Kotzikas Place Wigram Christchurch 8042 New Zealand **Search**
 Notes:
Map
History

Select any of the magnifying glass symbols to see if it is an existing customer or a new customer.

If existing, select the customer and select **'New Lead'**

If new customer, select **'New Lead'** this will create a new record

Details

Contact: Ms Telephone: 0800262620 Cust No. [] → **New Lead**

First Name: test Email: test@windoware.co.nz Account Name Business: []

Surname: test Mobile: []

Address: 5 Kotzikas Place, Wigram, Christchurch 8042, New Zealand [Search]

Notes: []

Possible Duplicate, please select from below

- This is a new customer
- 44. mr test, 80 Marshland Rd. (phone:) (mobile:) (email:)
- 48. testy test, 80 Marshland Rd. (phone:) (mobile:) (email:)
- 105. Mr test test, 14 Arawa St. (phone:) (mobile:) (email:)
- 106. Mr test test, 14 Arawa St. (phone:) (mobile:) (email:)
- 107. Mr test test, 14 Arawa St. (phone:) (mobile:) (email:)
- 122. Miss test test, 5 Kotzikas Pl. (phone:) (mobile:) (email:)
- 131. test test, 8 Queen Street. (phone: 0800262620) (mobile:) (email:)
- 133. Kim test, 6 Mokopuna Grove. (phone:) (mobile:) (email:)
- 134. Ms test test, 5 Kotzikas Place. (phone: 0800262620) (mobile:) (email: test@windoware.co.nz)
- 121. Mr Steven McGinness, 3/3 London St. (phone: 0800 262620) (mobile: 021 786129) (email: steve.mcginness@windoware.co.nz)
- 4. Mr nichola traack, 5 Kotzikas Pl. (phone: 347 4289) (mobile:) (email: nichola@xrt.a.co.nz)

Map

This will open a lead page. In the sales process the lead is where you gather information and sales history.

You may also enter a customer reference or job number. This will be saved with the customers details. Select **'Prospect'**

Lead > Prospect > Sales Call > Outstanding Proposal

Lead Information for: Ms test test (#135)

Cust Ref/Job No: residential build -Customer Te Telephone: 0800262620 Date: 07/05/2013

Mobile: [] Type: []

Contact Name: Ms test test Initial Consultant: kath

Delivery Address: 5 Kotzikas Place, Wigram, Christchurch 8042, New Zealand [Search]

Notes: New Build. Follow up in 3 months

Map

Prospect Details

Sales Call

Buttons: Cold, Lead, Prospect, Sales Call, Proposal, Save

The details screen will open. This is where you assign the job to the consultant who will be handling this prospect customer or lead

If the customer is ready for a house call at their property, select **'Sales Call'**

Otherwise, you can set a reminder. A calendar will open, set a date and time for you to follow up

The screenshot shows the 'windowizard 2.0' interface. The top header includes the logo and a user dropdown menu for 'Kath (MCP NZ Ltd) WindowOnLine' with a 'LOG OUT' button. The left sidebar contains navigation links: Home, My Orders & Proposals, Client Proposal, Place Orders (Order, MTM Track Order, MTM Blind Order), Edit (Saved Orders, Saved Proposals, Order Templates), and Freight (Freight Tracker). The main content area is titled 'Prospect Details' and contains the following fields: 'Cust Ref/Job No' (residential build -Customer Te), 'Telephone' (0800262620), 'Date' (07/05/2013), 'Contact Name' (Ms test test), 'Mobile' (empty), 'Type' (Website), 'Initial Consultant' (kath), 'Delivery Address' (5 Kotzikas Place, Wigram, Christchurch 8042, New Zealand), and 'Notes' (New Build. Follow up in 3 months). The 'Job Assigned To' is set to 'kath'. The 'Sales Value' and 'Potential' fields are empty. The 'Reminder' section is active, showing a calendar for August 2013 with the date 07/08/2013 and time 9:00 a.m. selected. A black arrow points to the 'Sales Call' button in the right-hand action menu.

Select **'Save'**

The screenshot shows the 'windowizard 2.0' interface. The top header includes the logo and a user dropdown menu for 'Kath (MCP NZ Ltd) WindowOnLine' with a 'LOG OUT' button. The left sidebar contains navigation links: Home, My Orders & Proposals, Client Proposal, Place Orders (Order, MTM Track Order, MTM Blind Order), Edit (Saved Orders, Saved Proposals, Order Templates), and Freight (Freight Tracker). The main content area is titled 'Prospect Details' and contains the following fields: 'Cust Ref/Job No' (residential build -Customer Te), 'Telephone' (0800262620), 'Date' (07/05/2013), 'Contact Name' (Ms test test), 'Mobile' (empty), 'Type' (Website), 'Initial Consultant' (kath), 'Delivery Address' (5 Kotzikas Place, Wigram, Christchurch 8042, New Zealand), and 'Notes' (New Build. Follow up in 3 months). The 'Job Assigned To' is set to 'kath'. The 'Sales Value' and 'Potential' fields are empty. The 'Reminder' section is active, showing a calendar for August 2013 with the date 07/08/2013 and time 9:00 a.m. selected. A black arrow points to the 'Save' button in the right-hand action menu.

To ensure you are up to date with follow ups, you can check your reminder.

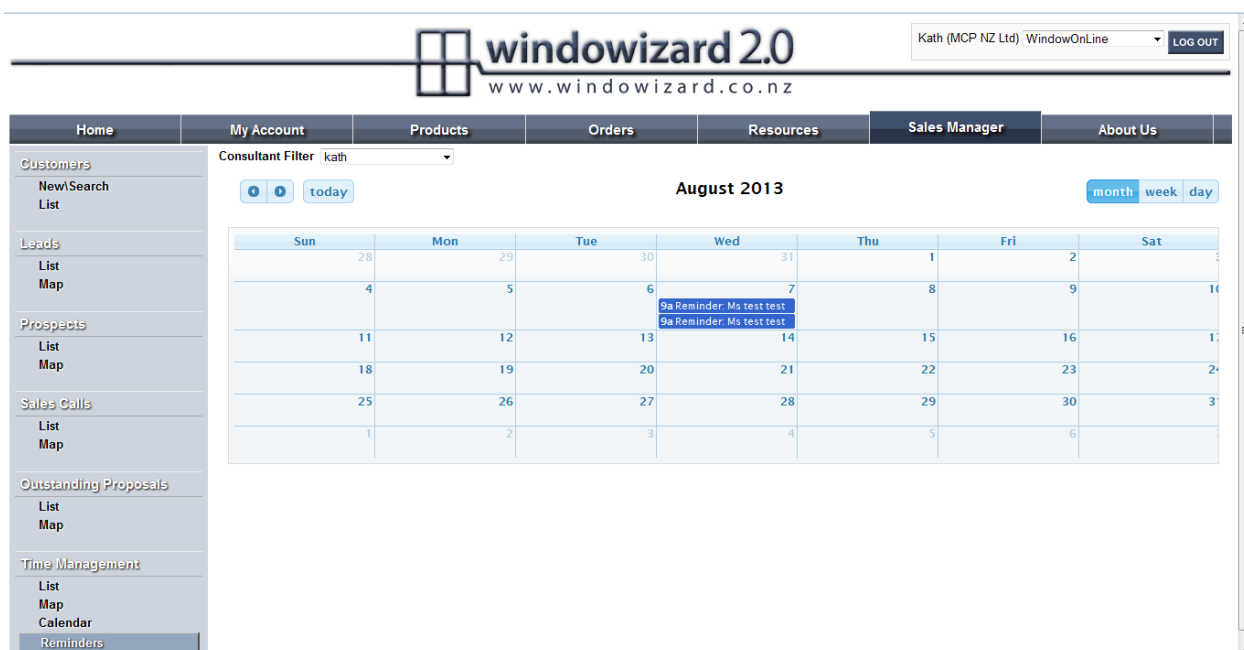
Select the 'Sales Manager' tab

'Time Management'

'Reminders'



This will open the calendar and show you your reminders. Click on a reminder and it will re-open the customer you saved so you can contact them to arrange a sales call. If they aren't ready then you can set another reminder for a later date



Enter any samples you will be taking in the samples box

Once you have selected '**Sales Call**' a diary will open up. Click on the day and time you have set for the call and the client information will appear in the time slot

[illegible]

If you click on the appointment it will open up all information from sales manager.

Select 'Save'

Windowizard 2.0
www.windowizard.co.nz

Home | My Account | Products | Orders | Resources | **Sales Manager** | About Us

Customers: New/Search, List
Leads: List, Map
Prospects: List, Map
Sales Calls: List, Map
Outstanding Proposals: List, Map
Time Management: List, Map, **Calendar**, Reminders

Consultant Filter: kath

Aug 11 — 17 2013 month week day

	Sun 11/Aug	Mon 12/Aug	Tue 13/Aug	Wed 14/Aug	Thu 15/Aug	Fri 16/Aug	Sat 17/Aug
6am							
7am							
8am							
9am							
10am							
11am							
12pm			11:30 - 12:30 residential build -Customer Te Ms test				
1pm							
2pm							
3pm							
4pm							
5pm							

Windowizard 2.0
www.windowizard.co.nz

Home | Customers | Leads | Prospects | Sales Calls | Outstanding Proposals | Time Management | **Calendar** | Reminders

Lead Information for : Ms test test (#134)

Cust Ref/Job No: residential build -Customer Te Telephone: 0800262620 Date: 07/05/2013
Contact Name: Ms test test Mobile: Type: Other
Initial Consultant: kath

Delivery Address: 5 Kotzikas Place, Wigram, Christchurch 8042, New Zealand Search

Notes: Customer looking to build new house. Follow up in 3 months

Map

Prospect Details

Job Assigned To: kath

Sales Value: Samples: ☐ Taken ☐ Returned

Potential: Medium

Reminder: Date: 07/08/2013, Time: 9:00 a.m., Notes: New build. follow up for sales call

Notes: Cold, Lead, Prospect, Sales Call, Proposal, Save

After returning from the sales call

'Sales Manager'

'Sales Calls'

'List'

Find the customer and select the pencil icon next to their details

The screenshot shows the Window Wizard 2.0 web application. The top navigation bar includes links for Home, My Account, Products, Orders, Resources, Sales Manager, and About Us. The Sales Manager section is active, and the 'Sales Calls' tab is selected. A table lists sales calls with columns: Date of Call, #, Customer, Job No, Address, Phone, and Taken by. The first entry is dated 08/05/2013, for customer 'Ms test test' at '5 Kotzikas Place'. A pencil icon is visible next to the 'Taken by' field 'kath'. An arrow points to this pencil icon.

Date of Call	#	Customer	Job No	Address	Phone	Taken by
08/05/2013	134	Ms test test	residential build -Customer Te	5 Kotzikas Place	0800262620	kath

This will open up the customer and you can start creating the proposal by selecting
'Proposal'

The screenshot shows the 'Lead Information for : Ms test test (#134)' page. It contains fields for Cust Ref/Job No, Telephone, Date, Contact Name, Initial Consultant, and Delivery Address. A 'Map' section is also present. Below the map, the 'Prospect Details' section shows 'Job Assigned To' as 'kath', 'Sales Value' as 'Medium', and a 'Reminder' set for 07/08/2013 at 9:00 a.m. On the right side, there is a vertical menu with buttons: Cold, Lead, Prospect, Sales Call, and Proposal. An arrow points to the 'Proposal' button.

Give the proposal to your customer

Create Client Proposal

Job Location	5 Kotzikas Place Wigram Christchurch 8042 New Zealand	Contact Person	Ms test test	Supplier	N/A
		Customer Reference	residential build -Custom		
Notes for Proposal			Options	residential build -Customer Te	

Inc.	Room	Qty	Retail (inc GST)	Discount	Total Retail (inc GST)
	Windows				
No rooms on proposal					
			\$0.00	\$0.00	\$0.00

Proposal Tools

- Installation
- What if...
- Re-Cost
- View Margin Report
- View Client Proposal

Gross Retail	\$ 0.00
Discount	\$ 0.00
Total Retail	\$ 0.00

Cancel Save Create Order

Keep on top of proposals by checking under

‘Sales Manager’

‘Outstanding Proposals’

Follow up proposals under

‘Order’ Tab

‘Saved Proposals’

windowizard 2.0
www.windowizard.co.nz

Kath (MCP NZ Ltd) WindowOnLine

Home	My Account	Products	Orders	Resources	Sales Manager	About Us
------	------------	----------	--------	-----------	---------------	----------

Customers

- New/Search
- List

Leads

- List
- Map

Prospects

- List
- Map

Sales Calls

- List
- Map

Outstanding Proposals

- List
- Map

Time Management

- List
- Map
- Calendar
- Reminders

Leads **Prospects** **Sales Calls** **Outstanding Proposals**

Consultant Filter kath

Date of Call	#	Customer	Job No	Address	Phone	Assigned To	Actual Call Date	Sales Value
07/05/2013	134	Ms test test	residential build -Customer Te	5 Kotzikas Place	0800262620	kath	Tue 13 Aug (11:30-12:30)	
13/03/2013	131	test test	Harcourts 1234	8 Queen Street	0800262620	kath		
20/02/2013	105	Mr test test	test	14 Arawa St		kath	Tue 19 Feb (09:00-10:00)	

If it has gone cold go to **'Sales Manager'** tab, select **'Outstanding Proposals'**

Open the job and select **'Cold'** and enter reason. This will close the job

windowizard 2.0

Kath (MCP NZ Ltd) Window

Lead

Prospect

Sales Call

Outstanding Proposal

Lead Information for : Ms test test (#134)

Cust Ref/Job Noresidential build -Customer Te

Telephone0800262620

Date08/05/2013

Proposal

Mobile

TypeWebsite

Contact NameMs test test

Initial Consultantkath

Delivery Address

5 Kotzikas Place
Wigram
Christchurch 8042
New Zealand

Search

Notes

Map

Prospect Details

Job Assigned To

kath

Sales Value

Potential

Medium

Samples:

Taken

Returned

Cold

Lead

Prospect

Sales Call

Create Client Proposal

Job Location5 Kotzikas Place
Wigram
Christchurch 8042
New Zealand

Contact PersonMs test test

SupplierN/A

S Manager

Customer Referenceresidential build -Custom

Save

Print

Notes for Proposal

Optionsresidential build -Customer Te

Inc.

Room

Qty

Discount

Total Retail (inc GST)

Add Room

Proposal Tools

Installation

Window

Re-Order

View Margin Report

View Client Proposal

Cancel Proposal?

Please select a reason for this cancellation

Too expensive, not within budget

Requirements changed

Delayed project

Gone elsewhere, Range Value

Unhappy with service

No follow-up

Error

Go Back

\$0.00

\$0.00

Gross Retail \$ 0.00

Discount \$ 0.00

Total Retail \$ 0.00

Cancel

Save

Create Order

Finding Customer History

'Sales Manager'

'Customer New/Search' or 'List'

If you select '**Search**' you can enter details and it will search the database for that customer

Customer

Details

Contact: Ms Telephone: 0800262620 Cust No.: 134

First Name: test Email: test@windoware.co.nz Account Name Business:

Surname: test Mobile:

Address: 5 Kotzikas Place, Wigram, Christchurch 8042, New Zealand

Notes:

Map

History

Type	Date	Job No	Consultant	Amount	Status	Supplier	Actions
Outstanding Proposal	07/05/2013	residential build -Customer Te	kath	\$0.00	Open		

Copy a Previous Proposal

Sometimes we will need to open a previous proposal to re order or change something. To re-open an order, do the following

'Previous Proposals'

Find the proposal and select the copy symbol next to it

My Orders & Proposals

Previous Proposals

Status	Copy	Consultant	Cust Name	Cust Ref	Date	Lines	Documents
		Jeremy Page	Mr jeremy page	test	23 April 2013	4	
		Jeremy Page	Mr fred dag	test	17 April 2013	14	
		Vince (MCP New Zealand)	Mrs Louise hanson	0001	20 March 2013	22	
		Jeremy Page	test test	test	14 March 2013	2	
		Vince (MCP New Zealand)	Miss test test	test	07 March 2013	12	
		Vince (MCP New Zealand)	Miss test test	test	07 March 2013	0	
		Jeremy Page	Mr John Smith	te3st	05 March 2013	0	
		Ian Veint (MCP NZ Ltd)	Mr John Smith	Smith	04 March 2013	0	
		Jeremy Page	Mrs shanna oniell	test	26 February 2013	16	
		Jeremy Page	Mrs shanna oniell	house	25 February 2013	16	
		Dave	bob parker	Test	22 February 2013	2	
		Dave	Mr bob parker	Test	22 February 2013	2	

This will re-open the sales manager. The customer will be back in the leads section or under Customer List

www.windowizard.co.nz

LOG OUT

Home

My Account

Products

Orders

Resources

Sales Manager

About Us

Customers

New/Search

List

Leads

List

Map

Prospects

List

Map

Sales Calls

List

Map

Outstanding Proposals

List

Map

Leads

Prospects

Sales Calls

Outstanding Proposals

Consultant Filter

kath

Date of Suspect	#	Customer	Address	Phone	Taken by
08/05/2013	122	Miss test test	5 Kotzikas Pl	kath	 
08/05/2013	122	Miss test test	5 Kotzikas Pl	kath	 
24/04/2013	133	Kim test	6 Mokopuna Grove	kath	 

Select the pencil of the one you have copied. It will re-open the job. Enter in a new customer reference and lead type

www.windowizard 2.0

LOG OUT

Home

Customers

New/Search

List

Leads

List

Map

Prospects

List

Map

Sales Calls

List

Map

Outstanding Proposals

List

Map

Time Management

List

Map

Calendar

Reminders

Lead

Prospect

Sales Call

Outstanding Proposal

Lead Information for : Miss test test (#122)

Cust Ref/Job No







Miss test test - version 2

Telephone

Date

08/05/2013

Pending

Mobile

Type

Contact Name


Miss test test

Initial Consultant

kath

Delivery Address

5 Kotzikas Pl
Wigram
Christchurch 8042
New Zealand



Notes

Cold

Lead

Prospect

Sales Call

Proposal

Save

Map

Prospect Details

Sales Call

Select 'Prospect'

'Assign Job'

'Proposal'

The screenshot shows the 'windowwizard 2.0' application window. The top bar includes the user 'Kath (MCP NZ Ltd)' and a 'WindowOnLine' dropdown, with a 'LOG OUT' button. The left sidebar contains a navigation menu with categories: Home, Customers (New/Search, List), Leads (List, Map), Prospects (List, Map), Sales Calls (List, Map), Outstanding Proposals (List, Map), and Time Management (List, Map, Calendar, Reminders). The main content area is titled 'Prospect Details' and contains several sections: 'Contact Name' (Miss test test), 'Initial Consultant' (kath), 'Delivery Address' (5 Kotzikas Pl, Wigram, Christchurch 8042, New Zealand), 'Notes', 'Map', 'Job Assigned To' (dropdown), 'Sales Value' (input), 'Potential' (dropdown), 'Samples' (Taken/Returned checkboxes), 'Reminder' (Date, Time, Notes), and a 'Sales Call' section. On the right, there are buttons for 'Cold', 'Lead', 'Prospect', 'Sales Call', 'Proposal', and 'Save'.

This will reopen the proposal with all the original information; however you are able to change what you need to

Create Client Proposal

The 'Create Client Proposal' form includes the following fields and sections:

- Job Location:** 5 Kotzikas Pl, Wigram, Christchurch 8042, New Zealand. Includes a 'S.I. Manager' icon.
- Contact Person:** Miss test test
- Supplier:** N/A
- Customer Reference:** Miss test test - version 2. Includes 'Save' and 'Details Report' buttons.
- Notes for Proposal:** Text area.
- Options:** Miss test test - version 2

Table:

Inc.	Room	Qty	Retail (inc GST)	Discount	Total Retail (inc GST)
	master				
<input checked="" type="checkbox"/>	a - Curtain and Track	1.00	\$1,177.34	\$9.63	\$1,167.71
<input checked="" type="checkbox"/>	a - Curtain and Track	1.00	\$1,106.50	\$0.00	\$1,106.50
			\$2,283.84	\$9.63	\$2,274.21

Proposal Tools:

- Installation
- What if...
- Re-Cost
- View Margin Report
- View Client Proposal

Summary:

Gross Retail	\$	2,274.21
Discount	\$	-274.21
Total Retail	\$	2,000.00

Buttons: Cancel, Save, Create Order

Create Multiple Proposals for Same Customer

On the proposal screen there is a copy button, select the copy button and it will create another option

Create Client Proposal [Option 2 of 2]

Job Location

5 Kotzikas Pl
Wigram
Christchurch 8042
New Zealand

Contact Person

Miss test test

Supplier

N/A

S. Manager

Customer Reference

Miss test test - version 2

Save

Details Report

Notes for Proposal

Options

Miss test test - version 2 #2

Miss test test - version 2 #1 : \$2,000.00

Miss test test - version 2 #2

Inc.	Room	Qty	Retail (inc GST)	Discount	Total Retail (inc GST)
	master				
	- add window				
<input checked="" type="checkbox"/>	a - Curtain and Track	1.00	\$1,177.34	\$9.63	\$1,167.71
<input checked="" type="checkbox"/>	a - Curtain and Track	1.00	\$1,106.50	\$0.00	\$1,106.50
			\$2,283.84	\$9.63	\$2,274.21

Proposal Tools

Installation

What if...

Re-Cost

View Margin Report

View Client Proposal

Gross Retail

\$

2,274.21

Discount

\$

-274.21

Total Retail

\$

2,000.00

Save

Create Order

Select the second option and build a second proposal for the customer by changing relevant information. This means you can print off as many copies as you need for the customer

Create Client Proposal [Option 2 of 2]

Job Location

5 Kotzikas Pl
Wigram
Christchurch 8042
New Zealand

Contact Person

Miss test test

Supplier

N/A

S. Manager

Customer Reference

Miss test test - version 2

Save

Details Report

Notes for Proposal

Options

Miss test test - version 2 #2

Miss test test - version 2 #1 : \$2,000.00

Miss test test - version 2 #2

Inc.	Room	Qty	Retail (inc GST)	Discount	Total Retail (inc GST)
	master				
	- add window				
<input checked="" type="checkbox"/>	a - Curtain and Track	1.00	\$1,177.34	\$9.63	\$1,167.71
<input checked="" type="checkbox"/>	a - Curtain and Track	1.00	\$1,106.50	\$0.00	\$1,106.50
			\$2,283.84	\$9.63	\$2,274.21

Proposal Tools

Installation

What if...

Re-Cost

View Margin Report

View Client Proposal

Gross Retail

\$

2,274.21

Discount

\$

-274.21

Total Retail

\$

2,000.00

Save

Create Order

Once the customer has accepted the correct option, once you open the proposal, you can delete the options no longer needed

Select **'Create Order'** of the one you want to send

Create Client Proposal [Option 2 of 2]

Job Location

S. Manager

5 Kotzikas Pl
Wigram
Christchurch 8042
New Zealand

Contact Person

Miss test test

Supplier

N/A

Customer Reference

Miss test test - version 2

Save

Details Report

Notes for Proposal

Options

Miss test test - version 2 #2

Inc.	Room	Qty	Retail (inc GST)	Discount	Total Retail (inc GST)
	Windows				
	master				
<input checked="" type="checkbox"/>	a - Curtain and Track	1.00	\$1,177.34	\$9.63	\$1,167.71
<input checked="" type="checkbox"/>	a - Curtain and Track	1.00	\$1,106.50	\$0.00	\$1,106.50
			\$2,283.84	\$9.63	\$2,274.21

Add Room

Proposal Tools

Installation

What if...

Re-Cost

View Margin Report

View Client Proposal

Gross Retail

\$ 2,274.21

Discount

\$ -274.21

Total Retail

\$ 2,000.00

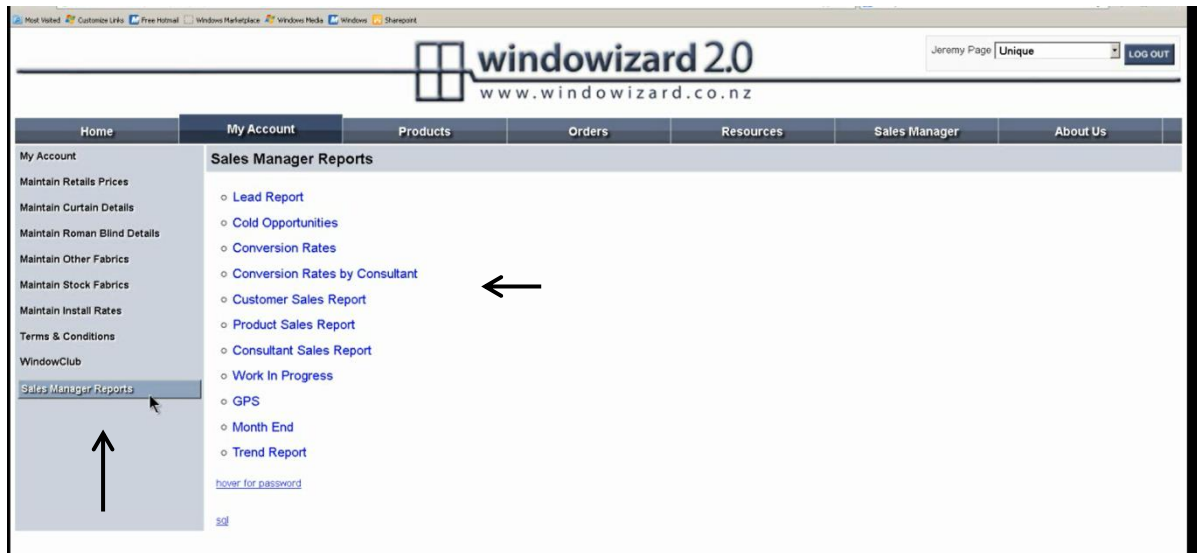
Save

Create Order

If you don't cancel the options you don't need, they will stay as a saved proposal until you have either ordered them off or cancelled them.

Sales Manager Reports:

Go to **'My Account'** and click on **'Sales Manager Reports'** on the left hand side and then choose from any of the reports listed in blue and **'Ok'**



Click on **'View Report'**

