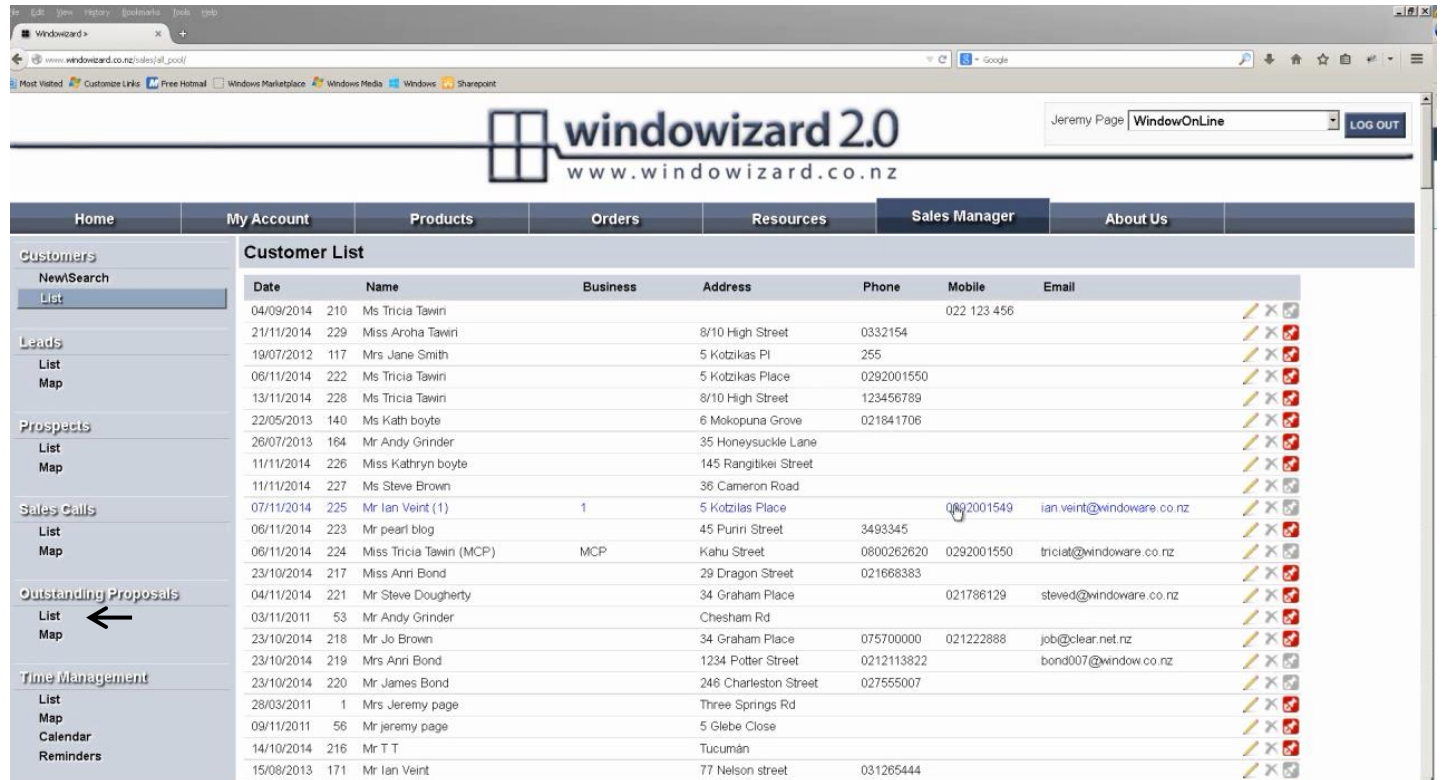


Fabric Swap

Go to the **Outstanding Proposals** tab and select **List**



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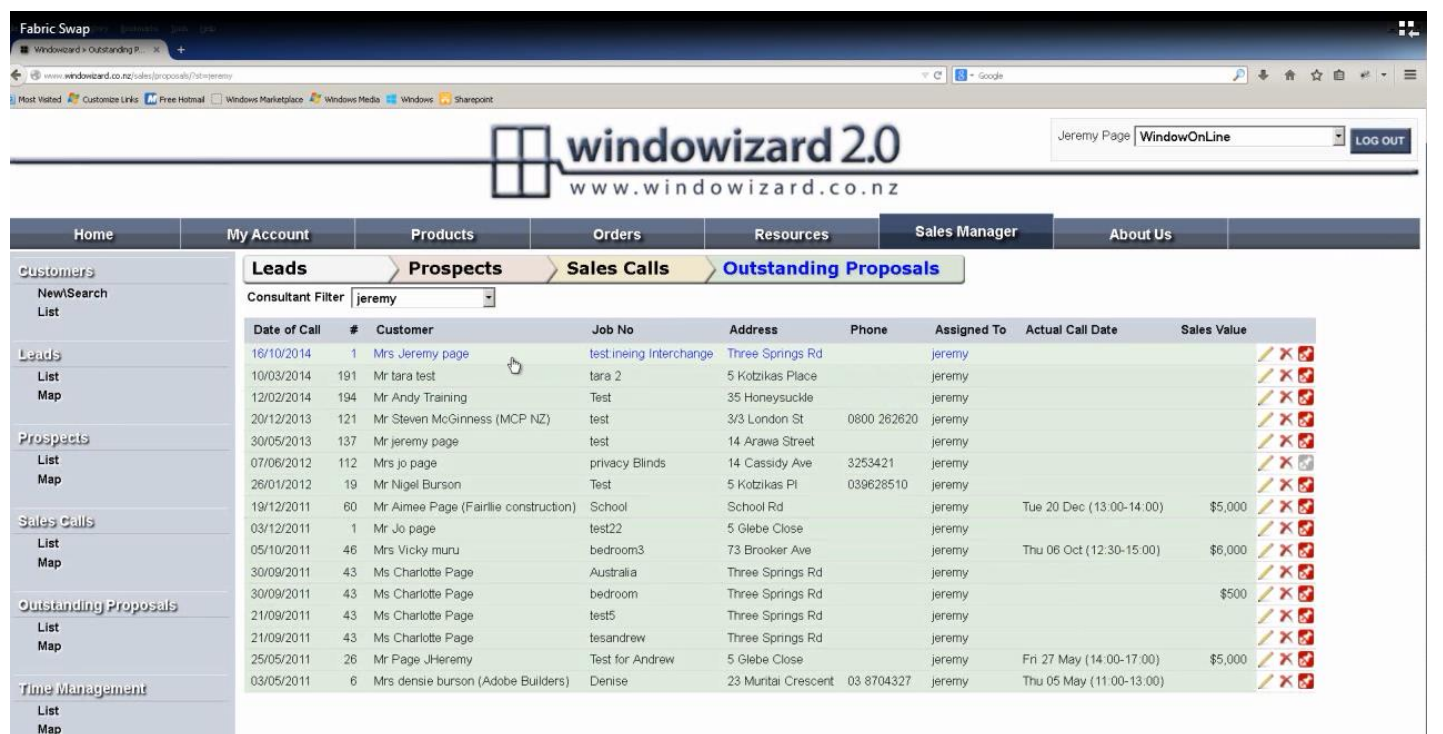
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Customer List

Date	Name	Business	Address	Phone	Mobile	Email
04/09/2014	210	Ms Tricia Tawiri			022 123 456	
21/11/2014	229	Miss Aroha Tawiri	8/10 High Street	0332154		
19/07/2012	117	Mrs Jane Smith	5 Kotzikas Pl	255		
06/11/2014	222	Ms Tricia Tawiri	5 Kotzikas Place	0292001550		
13/11/2014	228	Ms Tricia Tawiri	8/10 High Street	123456789		
22/05/2013	140	Ms Kath boyte	6 Mokopuna Grove	021841706		
26/07/2013	164	Mr Andy Grinder	35 Honeysuckle Lane			
11/11/2014	226	Miss Kathryn boyte	145 Rangitikei Street			
11/11/2014	227	Ms Steve Brown	36 Cameron Road			
07/11/2014	225	Mr Ian Veint (1)	5 Kotzikas Place		0692001549	ian.veint@windoware.co.nz
06/11/2014	223	Mr pearl blog	45 Puriri Street	3493345		
06/11/2014	224	Miss Tricia Tawiri (MCP)	MCP Kahu Street	0800262620	0292001550	triciat@windoware.co.nz
23/10/2014	217	Miss Anni Bond	29 Dragon Street	021668383		
04/11/2014	221	Mr Steve Dougherty	34 Graham Place		021786129	steved@windoware.co.nz
03/11/2011	53	Mr Andy Grinder	Chesham Rd			
23/10/2014	218	Mr Jo Brown	34 Graham Place	075700000	021222888	job@clear.net.nz
23/10/2014	219	Mrs Anni Bond	1234 Potter Street	0212113822		bond007@window.co.nz
23/10/2014	220	Mr James Bond	246 Charleston Street	027555007		
28/03/2011	1	Mrs Jeremy page	Three Springs Rd			
09/11/2011	56	Mr jeremy page	5 Glebe Close			
14/10/2014	216	Mr T T	Tucuman			
15/08/2013	171	Mr Ian Veint	77 Nelson street	031265444		

Select an existing proposal by clicking on the relevant name



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Leads Prospects Sales Calls Outstanding Proposals

Consultant Filter jeremy

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 J-Heremy	Test for Andrew	5 Glebe Close		jeremy	Fri 27 May (14:00-17:00)	\$5,000
03/05/2011	6	Mrs dense burson (Adobe Builders)	Denise	23 Murtai Crescent	03 8704327	jeremy	Thu 05 May (11:00-13:00)	

Click on the **pen symbol** next to proposal

Lead **Prospect** **Sales Call** **Outstanding Proposal**

Lead Information for : Mrs Jeremy page (#1)

Cust Ref/Job No: testineing Interchange Telephone: Date: 16/10/2014

Proposal: ← Mobile: Type: TV Advertisi

Contact Name: Mrs Jeremy page Initial Consultant: jeremy

Delivery Address: Three Springs Rd, Kimbell 7987, New Zealand. Search

Notes:

Map

Prospect Details

Job Assigned To: jeremy

Sales Value: Samples: ☐ Taken ☐ Returned

Potential: Cold Lead Prospect Sales Call Proposal

Reminder: Date Time Notes

Select which fabrics you want to change by checking or unchecking the corresponding boxes

Select **Swap Fabric**

Create Client Proposal [Option 4 of 4]

Job Location: Three Springs Rd, Kimbell 7987, New Zealand. Contact Person: Mrs Jeremy page. Supplier: N/A

S. Manager: Customer Reference: testineing Interchange. Save Details Report

Notes for Proposal: Options: testineing Interchange #4

Inc.	Room	Windows	Qty	Retail (inc GST)	Discount	Total Retail (inc GST)
Base line	-	add window				
✓		Chicane Bonny - Curtain Only	1.00	\$572.31	\$0.00	\$572.31
✓		Chicane only - Curtain Only	1.00	\$467.74	\$0.00	\$467.74
✓		w3 - Blind V2	1.00	\$305.50	\$0.00	\$305.50
✓		Chicane Megaline - Curtain Only	1.00	\$803.58	\$0.00	\$803.58
✓		Chicane Megaline - Curtain Only	1.00	\$572.31	\$0.00	\$572.31
new Swap	-	add window				
✓		w3 - Curtain Only	1.00	\$392.74	\$0.00	\$392.74
✓		w3 - Curtain Only	1.00	\$392.74	\$0.00	\$392.74
✓		Installation	1.00	\$609.50	\$0.00	\$609.50
				\$3,916.42	\$0.00	\$3,916.42

Swap Fabric

Proposal Tools: Installation

Gross Retail \$ 3,916.42
Discount \$ 0.00

Select which fabric you would like from the drop down box,

If your choice is not there, select '**Choose a different fabric**'

Create Client Proposal [Option 4 of 4]

New Fabric [choose a different fabric](#) ←

Bulk Maintenance

Type	Inc.	Fabric	Drapes	Fullness	Drops to Make	R.Width	Drops/Cuts to Order	Making Instructions
Base line - Chicane Bonny								
Fabric	✓	James Dunlop Textiles TAFFY BEETLE	1	1.805	2.50	3750	3	
Lining		James Dunlop Textiles MEGALINE 150 CTD IVORY			2.50		3	
Base line - Chicane only								
Fabric	✓	James Dunlop Textiles TAFFY BEETLE	1	1.805	2.50	3750	3	1 x 3 Drops
Chicane Megaline - Chicane Megaline								
Fabric	✓	James Dunlop Textiles TAFFY BEETLE	1	1.805	2.50	3750	3	
Lining		James Dunlop Textiles BONNY 3 PASS BLACKOUT BLUESTONE			2.57		3	
Chicane Megaline - Chicane Megaline								
Fabric	✓	James Dunlop Textiles TAFFY BEETLE	1	1.805	2.50	3750	3	
Lining		James Dunlop Textiles MEGALINE 150 CTD IVORY			2.50		3	

Enter fabric name in search box and click **search**

Product Index James Dunlop Textiles

[Back](#)

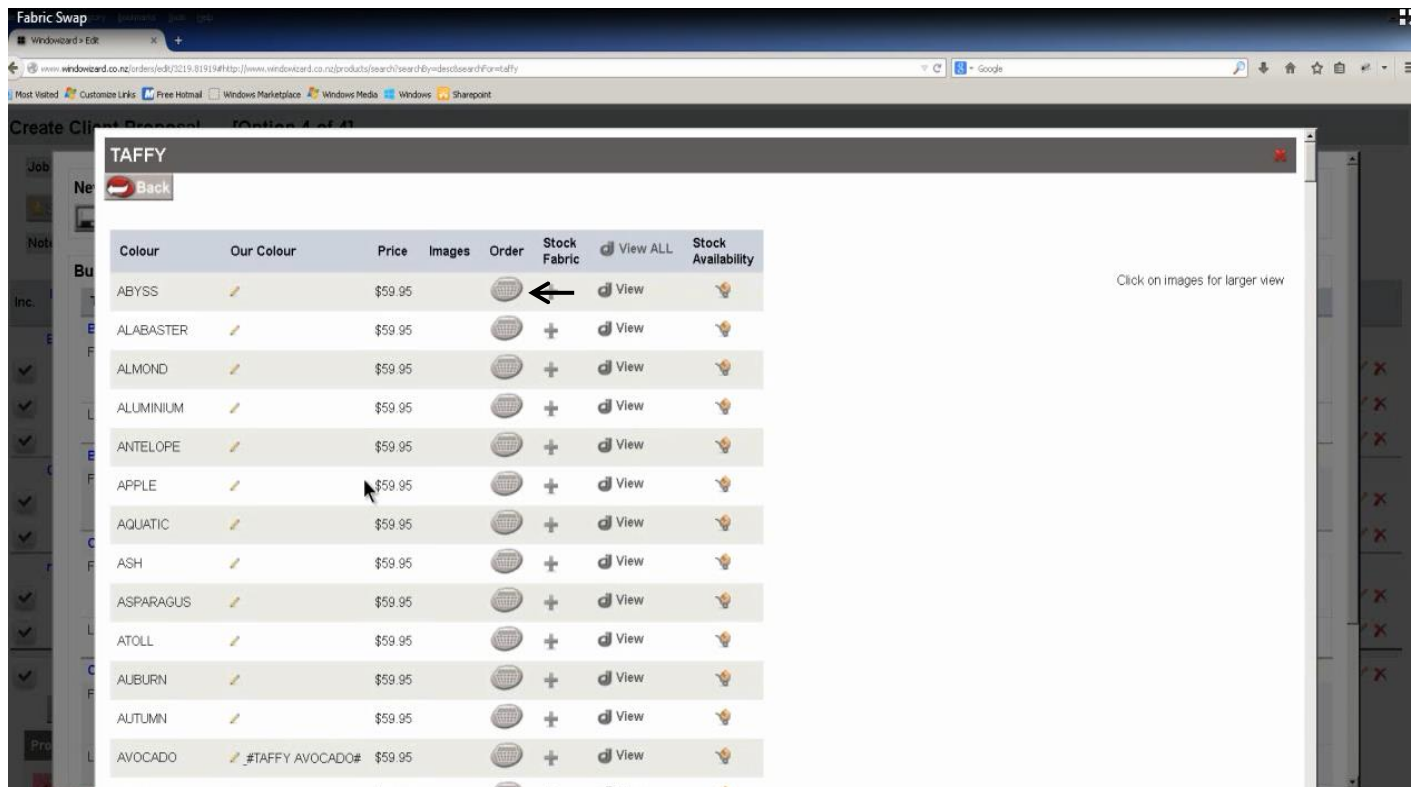
Keyword: [Search](#) ←

Editor

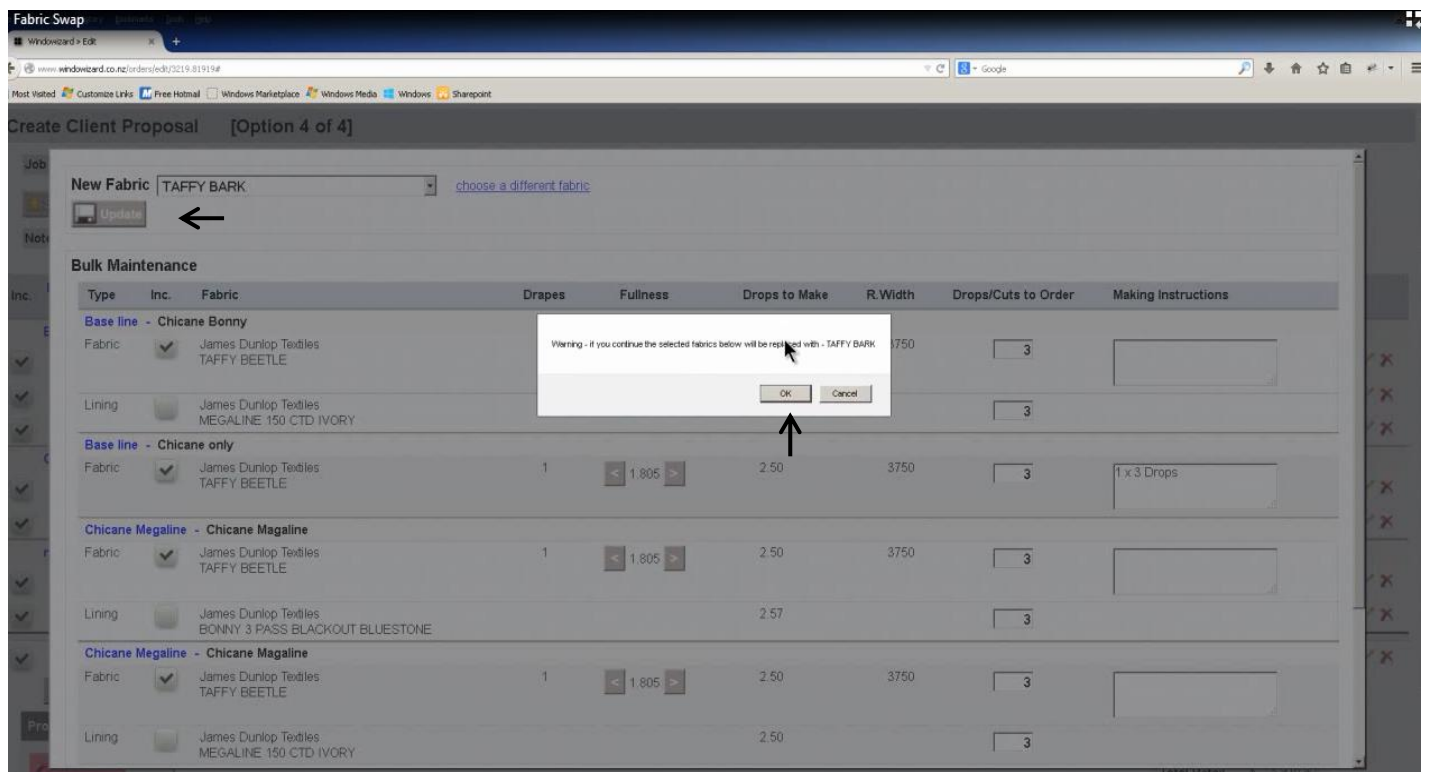
Estate

- INTERNATIONAL**
 - Baumann
 - Collier Campbell
 - D.O.T.T.
 - Designtex
 - Fischbacher
 - FR One
 - Lorient Decor
 - Neisha Crosland
 - SMD
 - Sundry
 - Villa Nova
 - Voyage
 - Wilman
 - ZINC
- James Dunlop**
 - James Dunlop
 - JD INDENT
- Linings**
 - Linings
- Loop**

Scroll down to select desired colour and select the **order** icon



Select 'Update' then 'OK'



Adjust making instructions to suit by selecting the arrows

FabricSwap

Windowcard > Edit

www.windowcard.co.nz/orders/edit/3219-819194

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Create Client Proposal [Option 4 of 4]

New Fabric choose a different fabric

Update

Bulk Maintenance

Type	Inc.	Fabric	Drapes	Fullness	Drops to Make	R.Width	Drops/Cuts to Order	Making Instructions
Base line - Chicane Bonny								
Fabric	<input checked="" type="checkbox"/>	James Dunlop Textiles TAFFY BARK	1	< 1.805 >	2.50	3750	3	
Lining	<input type="checkbox"/>	James Dunlop Textiles MEGALINE 150 CTD IVORY			2.50		3	
Base line - Chicane only								
Fabric	<input checked="" type="checkbox"/>	James Dunlop Textiles TAFFY BARK	1	< 1.805 >	2.50	3750	3	1 x 3 Drops
Chicane Megaline - Chicane Megaline								
Fabric	<input checked="" type="checkbox"/>	James Dunlop Textiles TAFFY BARK	1	< 1.805 >	2.50	3750	3	
Lining	<input type="checkbox"/>	James Dunlop Textiles BONNY 3 PASS BLACKOUT BLUESTONE			2.57		3	
Chicane Megaline - Chicane Megaline								
Fabric	<input checked="" type="checkbox"/>	James Dunlop Textiles TAFFY BARK	1	< 1.805 >	2.50	3750	3	
Lining	<input type="checkbox"/>	James Dunlop Textiles MEGALINE 150 CTD IVORY			2.50		3	

Select 'Update' and 'OK'

FabricSwap

Windowcard > Edit

www.windowcard.co.nz/orders/edit/3219-819194

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Create Client Proposal [Option 4 of 4]

Fabric	<input checked="" type="checkbox"/>	James Dunlop Textiles TAFFY BARK	1	< 2.180 >	3.00	4500	3	1 x 3 drapes
Lining	<input type="checkbox"/>	James Dunlop Textiles MEGALINE 150 CTD IVORY			3.00		3	
Base line - Chicane only								
Fabric	<input checked="" type="checkbox"/>	James Dunlop Textiles TAFFY BARK	1	< 1.805 >	2.50	3750	3	1 x 3 Drops
Chicane Megaline - Chicane Megaline								
Fabric	<input checked="" type="checkbox"/>	James Dunlop Textiles TAFFY BARK	1	< 1.805 >	2.50	3750	3	
Lining	<input type="checkbox"/>	James Dunlop Textiles BONNY 3 PASS BLACKOUT BLUESTONE			2.57		3	
Chicane Megaline - Chicane Megaline								
Fabric	<input checked="" type="checkbox"/>	James Dunlop Textiles TAFFY BARK	1	< 1.805 >	2.50	3750	3	
Lining	<input type="checkbox"/>	James Dunlop Textiles MEGALINE 150 CTD IVORY			2.50		3	

Save Fullness, Drops and Instructions to the Proposal

Update

Back to Proposal