

Starting a Client Proposal in Sales Manager

Select Orders page from the main screen, select Client Proposal on the right hand side

The screenshot shows the Windowizard Sales Manager interface. At the top right is the Windowizard logo and the website URL www.windowizard.com. Below the logo is a navigation bar with tabs for Home, Setup, Products, Orders (highlighted), and Resources. On the left is a sidebar menu with sections: My Orders & Proposals (with Client Proposal highlighted), Place Orders (with Order, MTM Track Order, and MTM Blind Order), Edit (with Saved Orders, Saved Proposals, and Order Templates), and History. The main content area is titled 'My Orders & Proposals' and features a filter bar for 'MCP NZ Ltd.' with other filters for James Dunlop, Charles Parsons, Basford, Nettex, Textilia, Unique, and Villa Textiles. Below the filter bar is a 'Quick Find' search box with the text 'Search here...' and a red 'SEARCH' button, with a checked 'Proposals' checkbox. Underneath is a table titled 'MCP New Zealand Ltd Orders' with three rows: 'Sent Orders' (258), 'Saved Orders' (949), and 'Order Templates' (12), each with a magnifying glass icon. At the bottom of the main area is the heading 'Windowizard Proposals'.

Fill in name, address, email and phone number fields. For the address, type the first line and press search to use Google Maps. Press New Lead when complete

The screenshot shows the 'Details' form for a new lead. The form is divided into several sections: 'Contact' (with a dropdown for 'Ms'), 'Telephone' (0123456789), 'System No.', 'First Name' (Sarah), 'Email' (sarah.field@gmail.com), 'Cust No.', 'Surname' (Field), 'Mobile', and 'Account Name Business'. The 'Address' section contains '94 Stoddard Road', 'Wesley', and 'Auckland 1041', with a 'Search' button next to it. The 'Notes' section is empty. On the right side of the form, there are three buttons: 'New Lead' (highlighted in yellow), 'Save', and 'Close'. Below the form are sections for 'Map' and 'History'.

Enter an order reference of your choice or select Generate Reference for Wizard to allocate one. Select the Type which is how the lead came to contact the retailer. Press New Lead to move on

Lead Information for : Ms Sarah Field (#705)

Cust Ref/Job No: Telephone: 0123456789 Date: 06/06/2024

Email: sarah.field@gmail.com Type: Google Sear

Contact Name: Ms Sarah Field Mobile: Initial Consultant: autumn123

Delivery Address: 94 Stoddard Road Wesley Auckland 1041

Notes:

Map

Prospect Details

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

In the orange section, use the dropdown to allocate the job/lead to the relevant consultant. Select Proposal on the right hand side

Job Assigned To: -blank-

Sales Value:

Potential:

Reminder: Date Time

Notes:

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

You are now in the proposal/quote screen and can proceed to adding a room and then a product within the room

Create Client Proposal - Window Online Demonstration Account

Job Location: 94 Stoddard Road, Wesley, Auckland 1041
Contact Person: Ms Sarah Field
Contract: No Contract
Customer Reference: Order Ref Here
Options: Order Ref Here
Notes for Proposal: [Text Area]
Buttons: S. Manager, Save, Details, Workroom, Fitting, cust no: -missing-

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

Summary:
 Gross Retail \$ 0.00
 Discount \$ 0.00
 Total Retail \$ 0.00

Buttons: Cancel, Save, Create Order

Proposal Tools:
 + Add Room
 Installation
 What if...
 Re-Cost
 View Client Proposal
 View Margin Report
 Details Report
 Workroom Instructions
 Fitting Instructions