Deal Manager

What's New?

Use Case Scenarios

Creators of SalesBuilderPRO

Deal Manager – What's New?

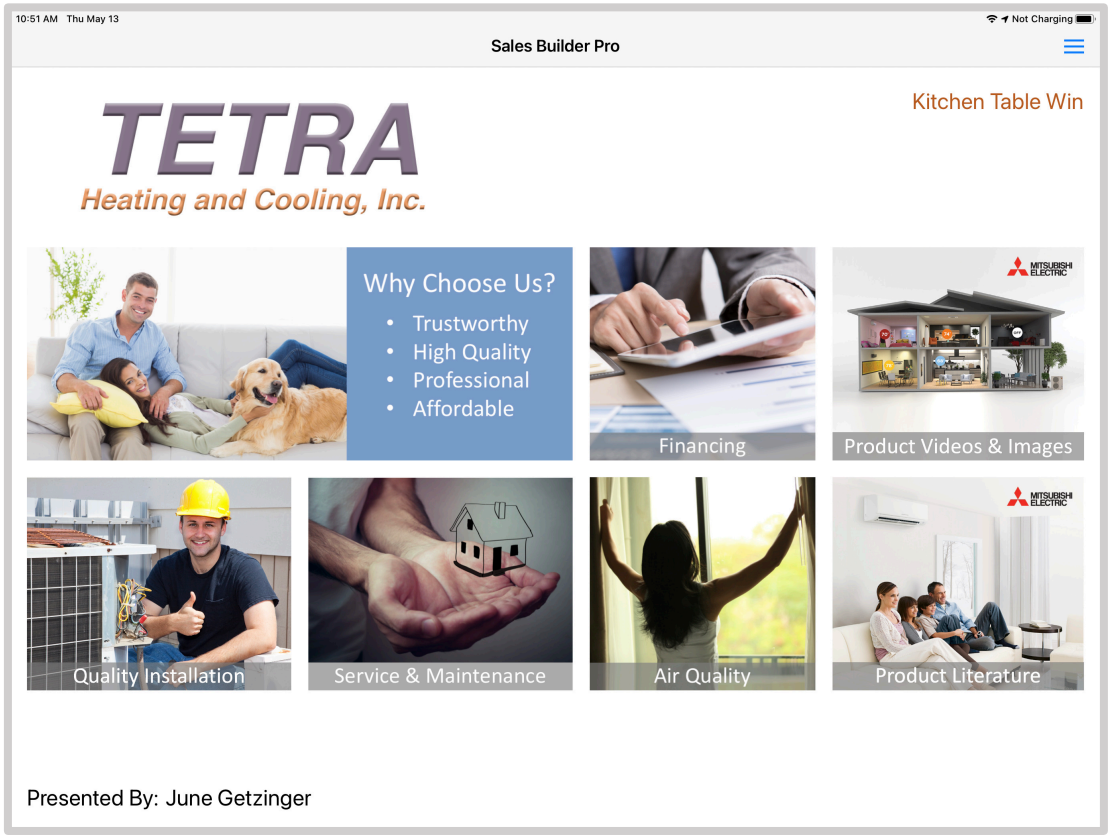
Remote Deal Acceptance

Enhanced Search Capabilities

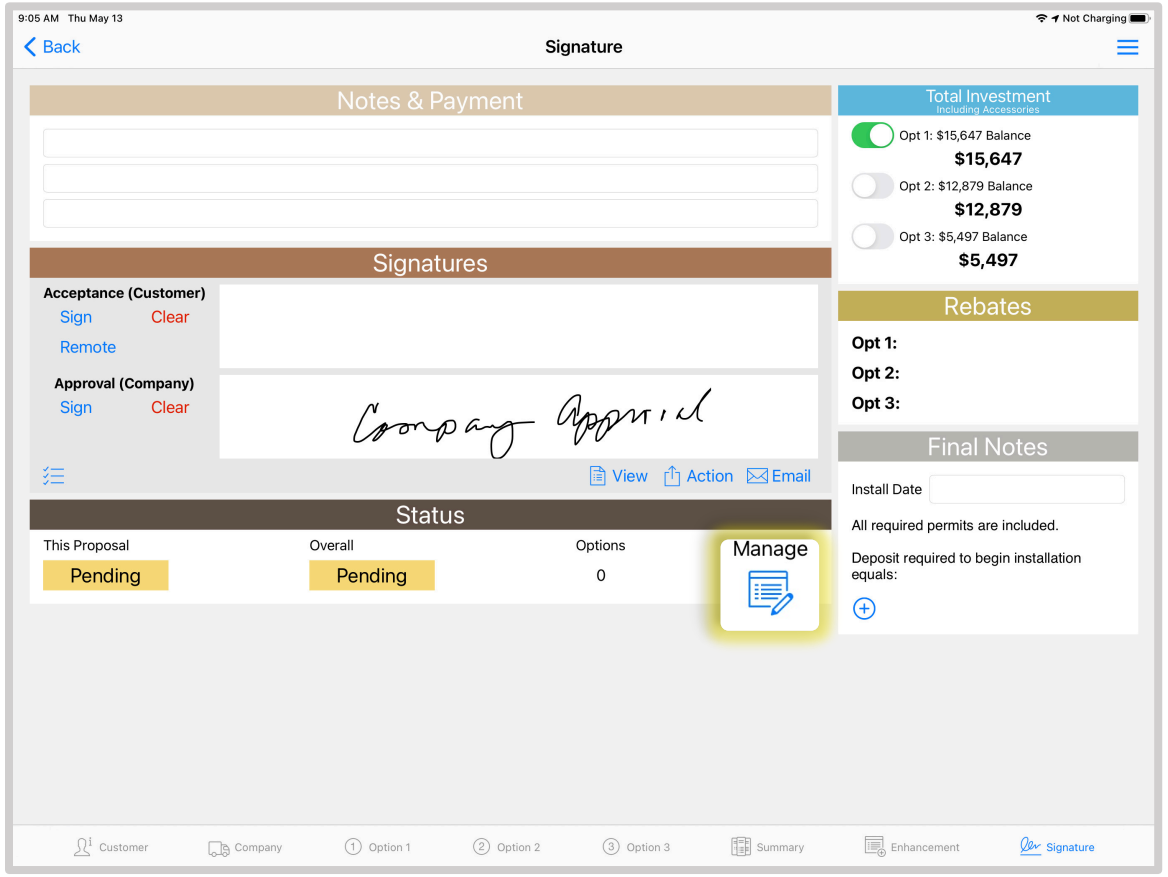
Office User Deal Management

Deal Manager Use Case Scenarios

- Kitchen Table Win
- Remote Customer Acceptance
- Office User Manage the Deal



Kitchen Table Win



- Build a 3 option Quote
- Select an Option
- Company Approval Signature
- Proposal and Overall Deal Status Pending
- Manage the deal - Add Notes

Manage Deal

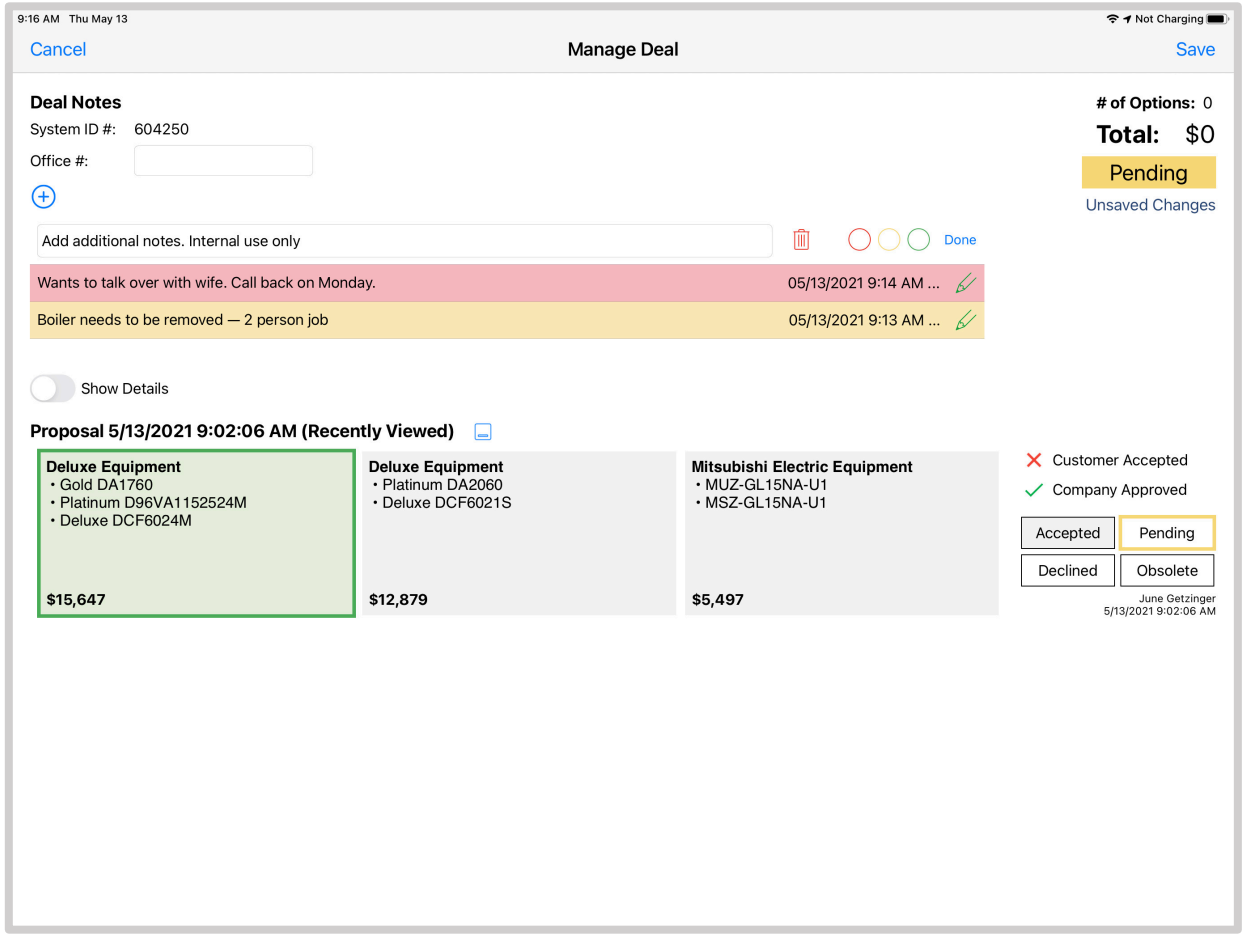
Additional Notes

- Add Color Coded Notes
- Internal visibility

Sales follow-up

Installation team

Accounts receivable team



Remote Customer Acceptance

Simple Search

- Customer Name
- Narrow results with date range, proposal status and/or Advanced Filters
- Open the proposal

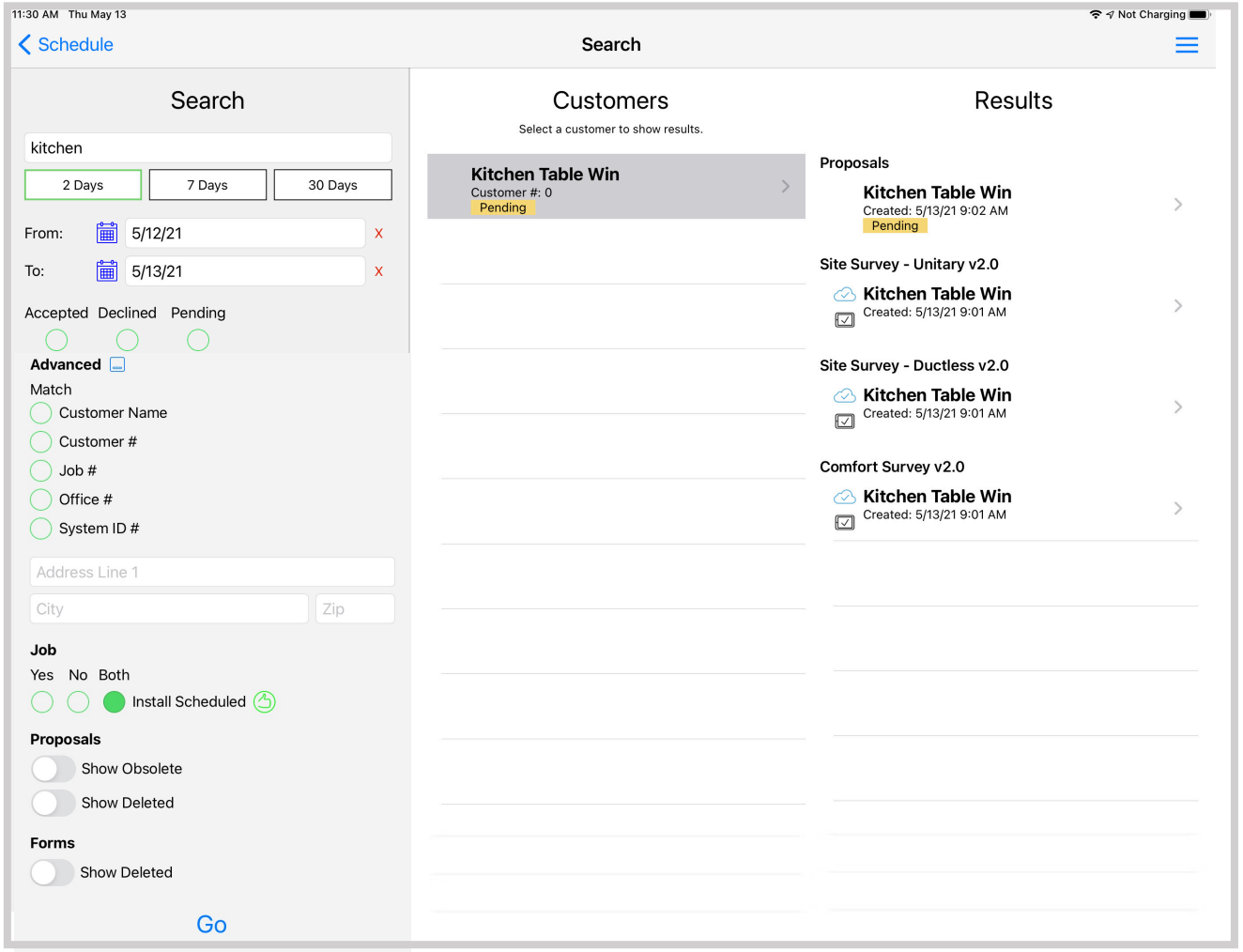
Build Weekly To Do List

Date filter:

2 days: "HOT"

7 days: "WARM"

30 days: "COLD"



Remote Customer Acceptance

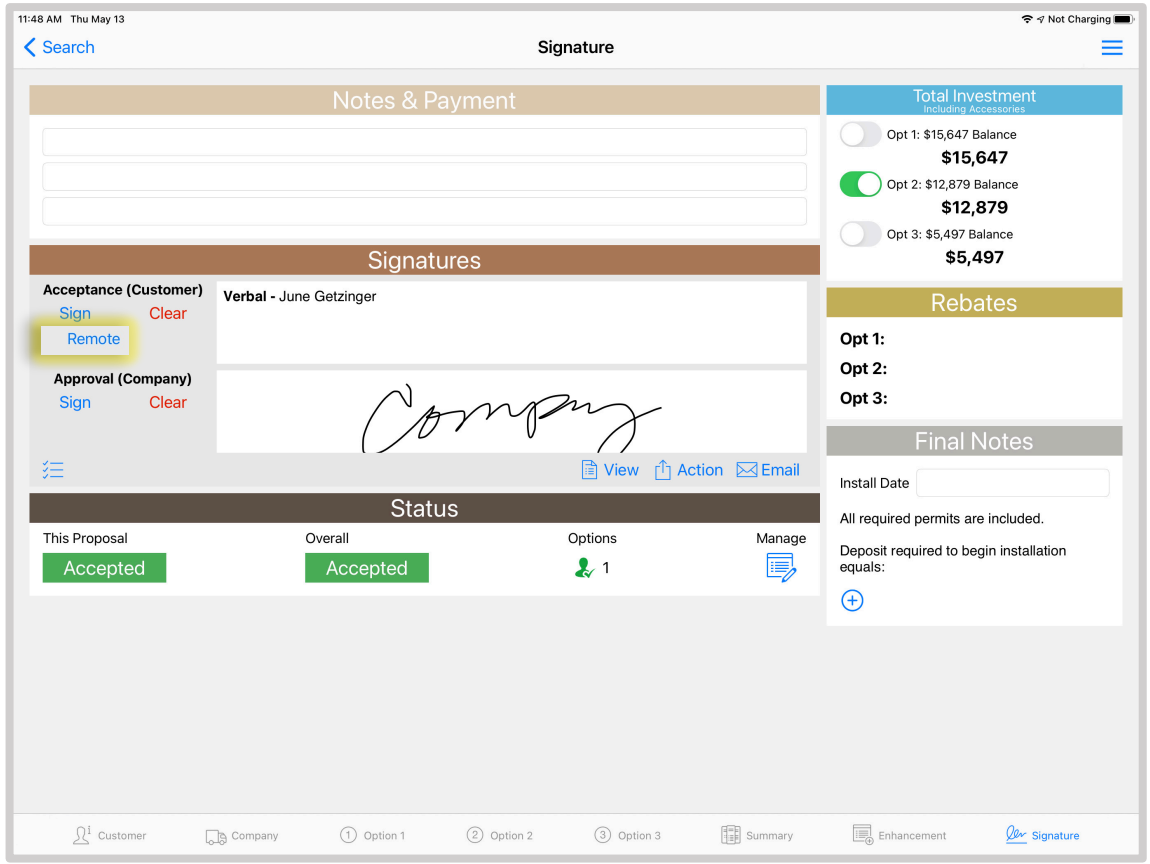
Remote Acceptance

- Customer calls verbally accepts Option 2
- Select Option 2
- Original quote becomes obsolete
- Revised quote is pending

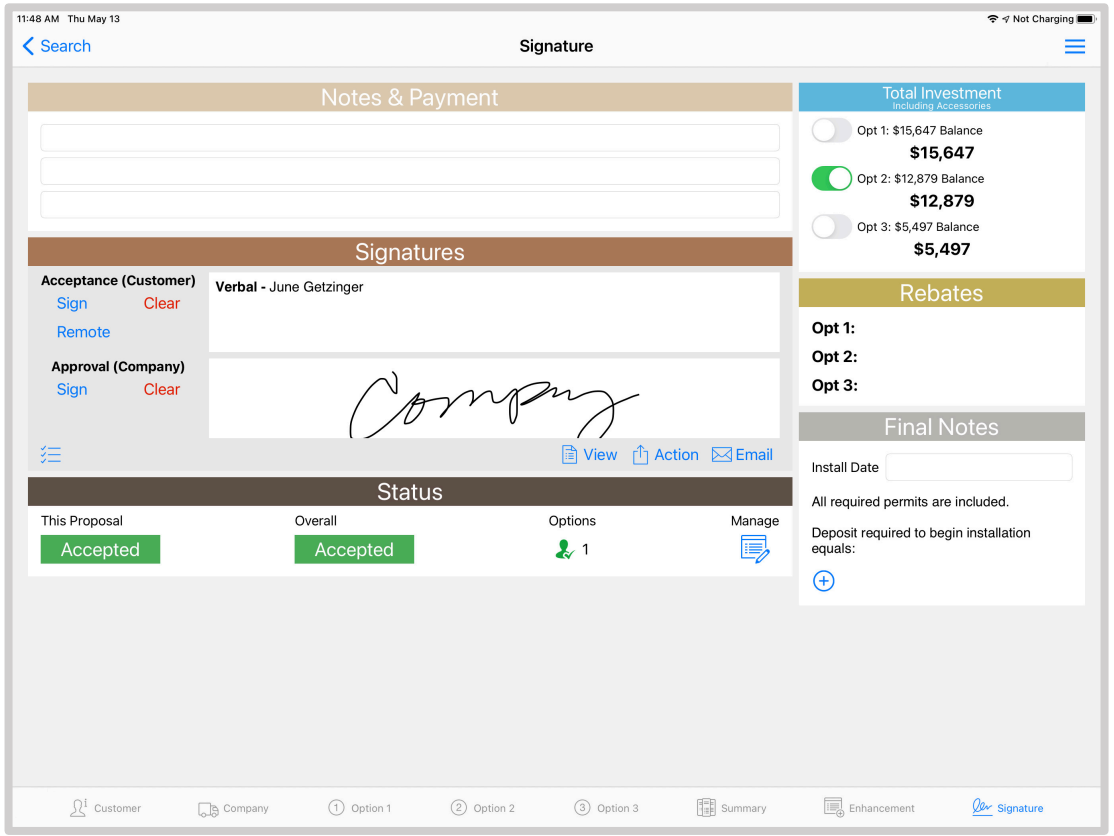
Remote

Select mode of Acceptance:

- Signature on File
- Email/Written
- Verbal



Remote Customer Acceptance



- Customer Acceptance displays ”how” and “who”

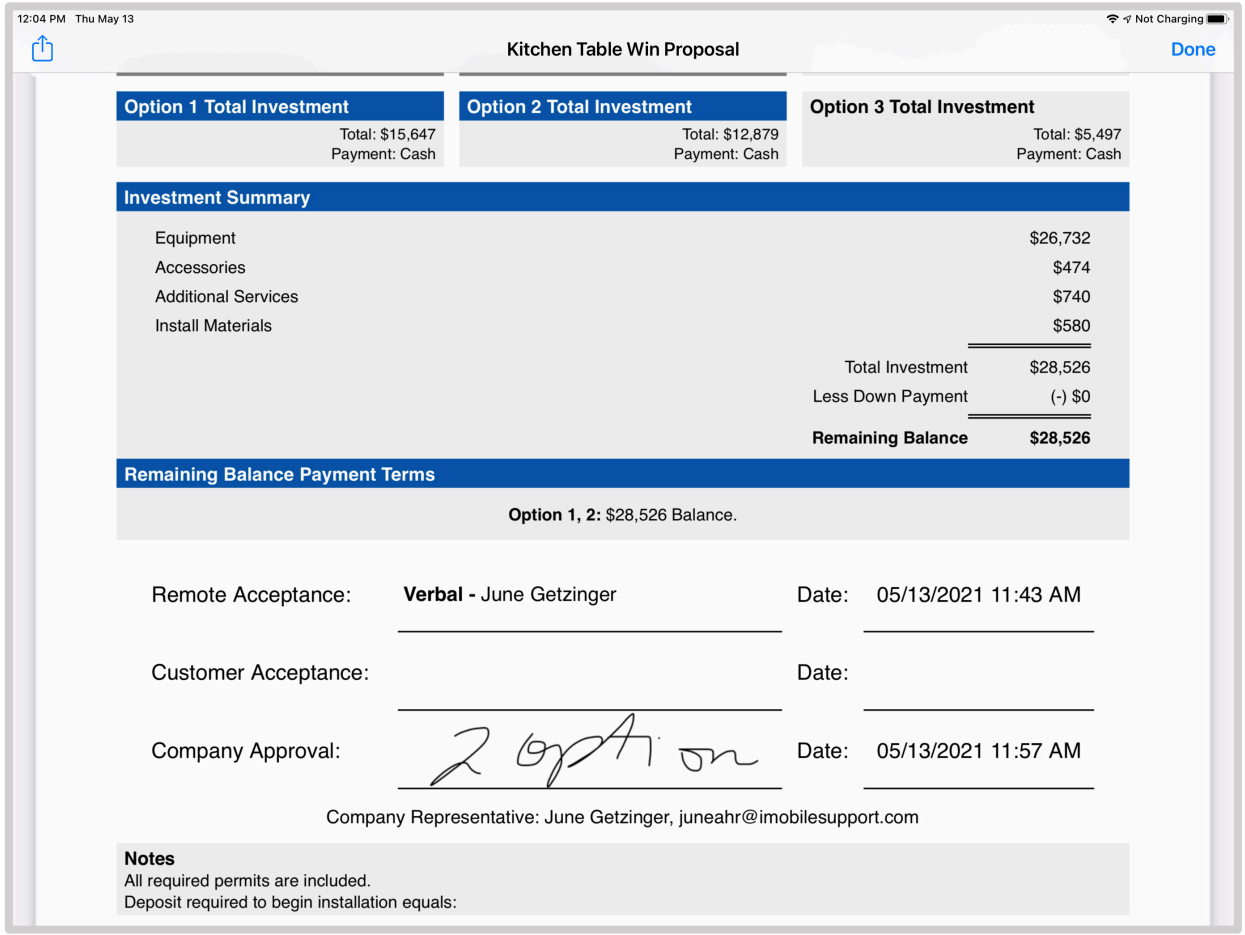
Status

- Accepted displays for the Proposal and Overall deal Status.
- Options displays the number of options selected

Note: Verification is required when more than one option is selected. “Tap” Manage to verify options.

Proposal PDF

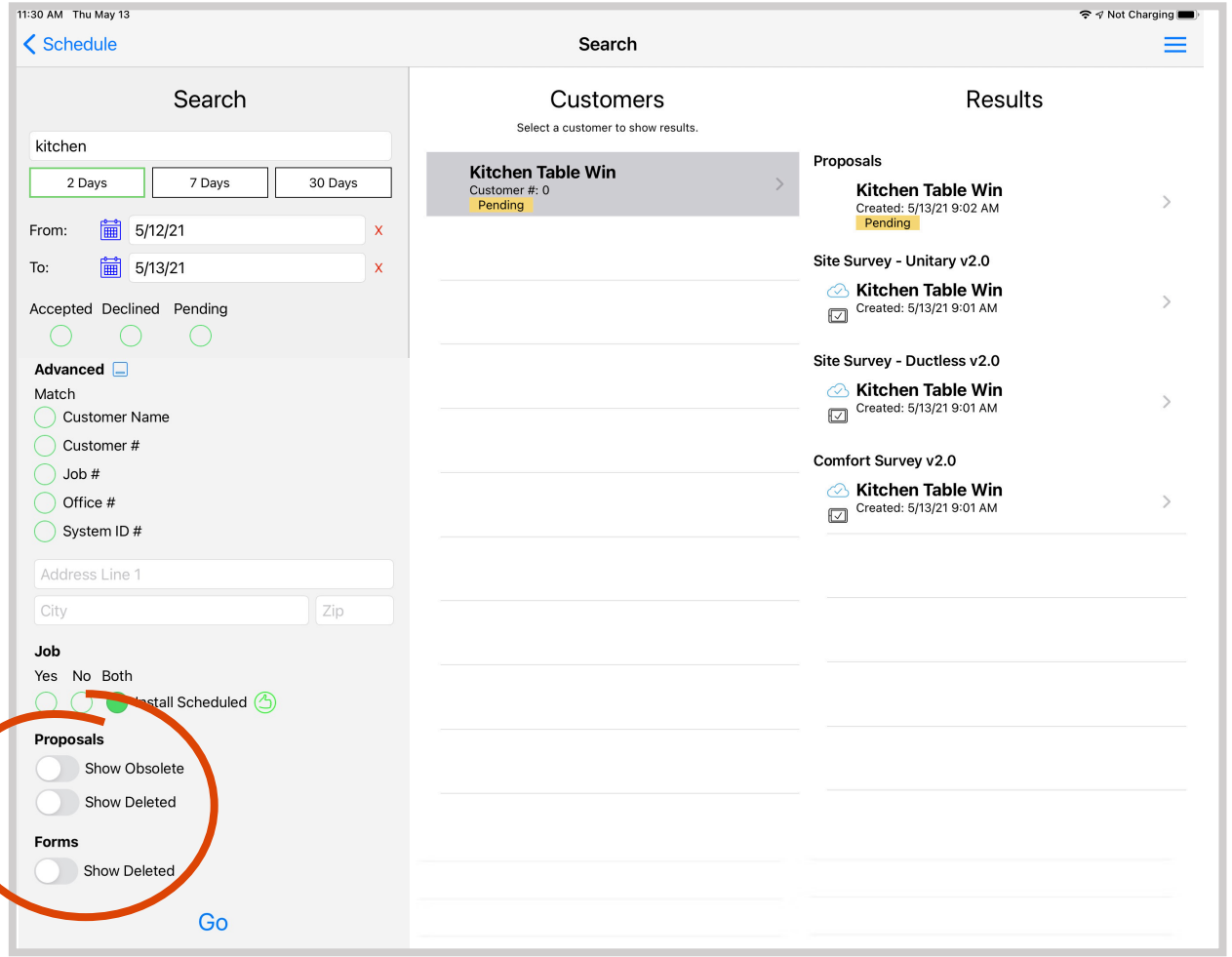
- Remote Acceptance Line



Advanced Search

Advanced Search

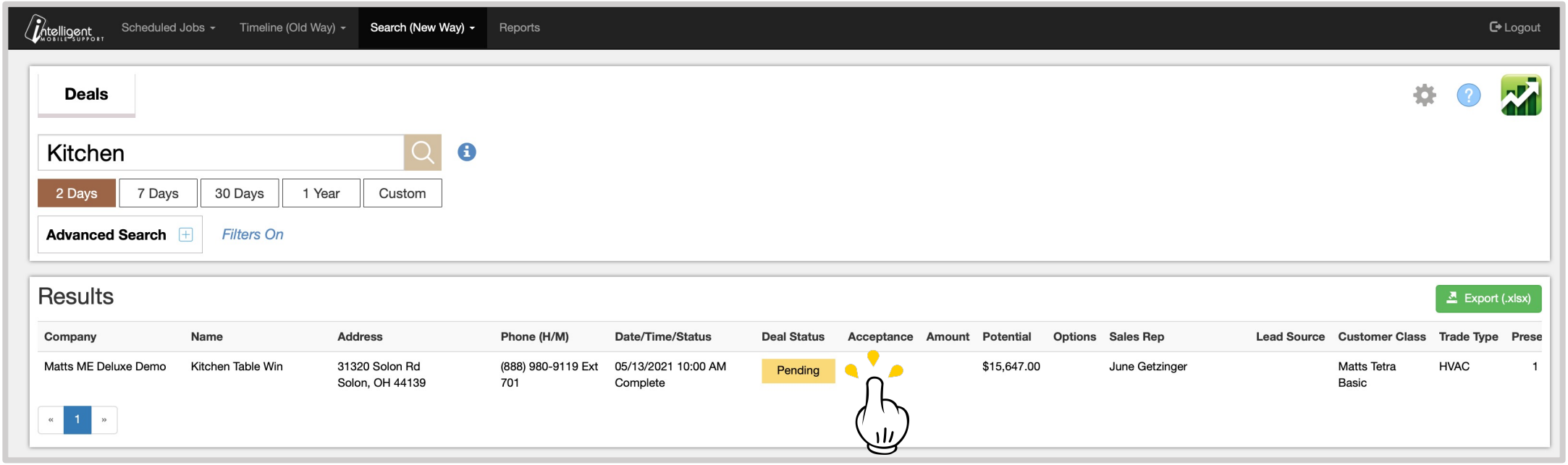
- Narrow results Advanced Filters
- Enter Customer Name, Customer #, Job#, Office #, System ID #, Address
- Select date range
- Obsolete and Deleted Proposals will not display
- Turn On “Show Obsolete/Deleted to reopen obsolete and deleted proposals
- Open the proposal



Office User

Remote Win in the Office

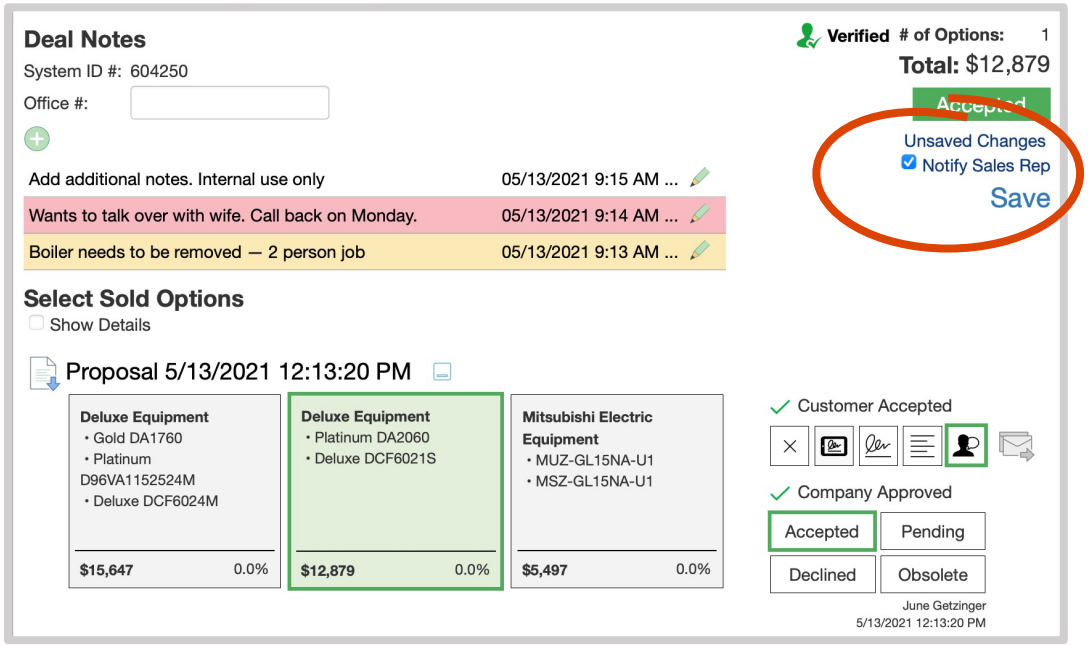
- Sales Management Tools > Search (New Way) Tab
- Deal Search
- Customer Name, Date Range or narrow results with Advanced Search
- Select the deal to open the Deal Manager

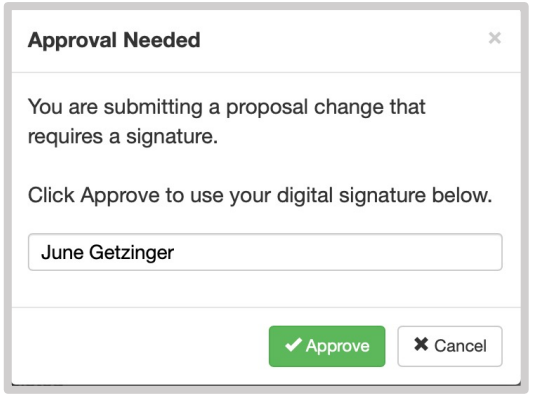


Remote Win in the Office

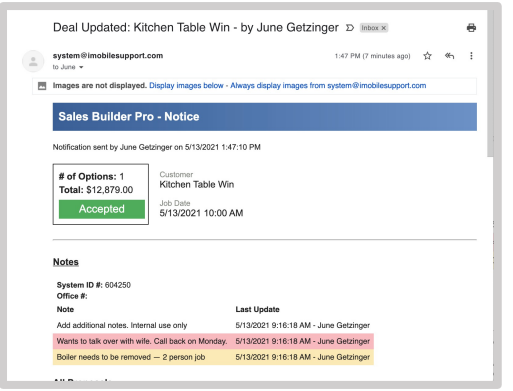
- Select Option
- Select Customer Acceptance
  - Signature on File
  - Email/Written
  - Verbal
- Enter Office #, Notes
- Save
- Approve digital signature
- Notify Sales Rep Email

  Subject Line: Deal Updated: Kitchen Table Win - by June Getzinger



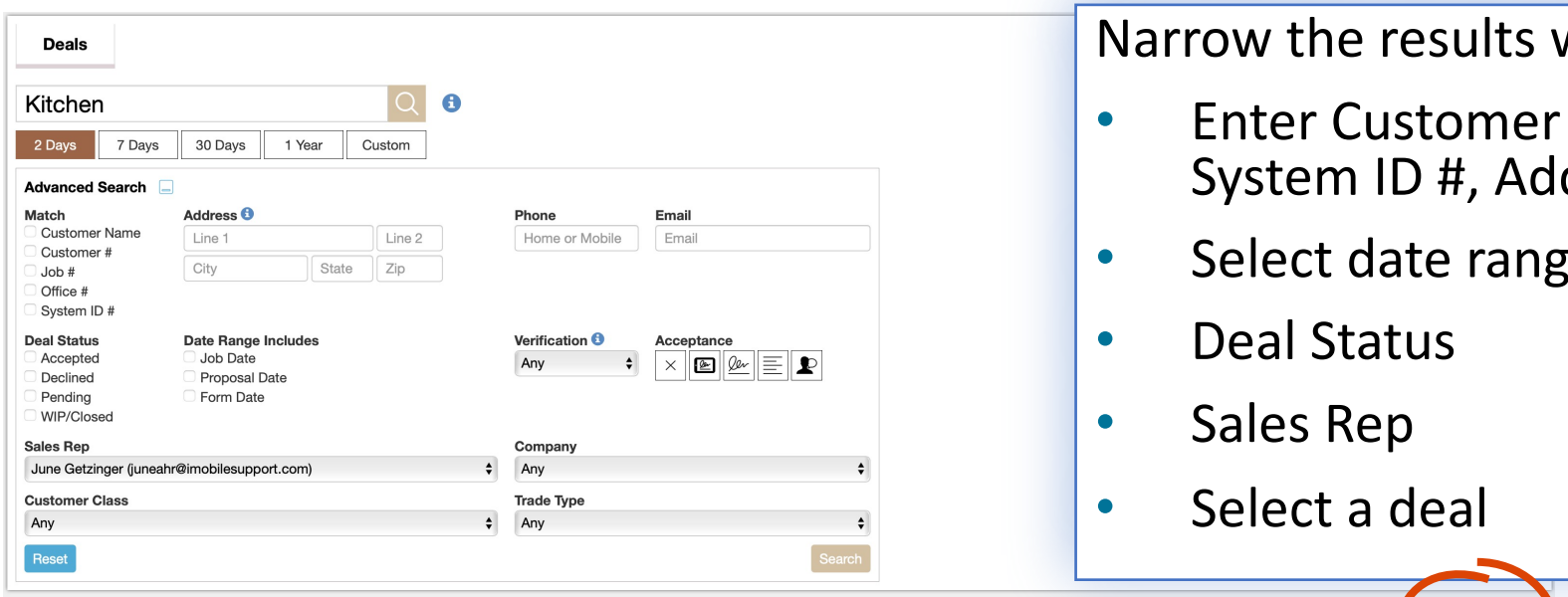


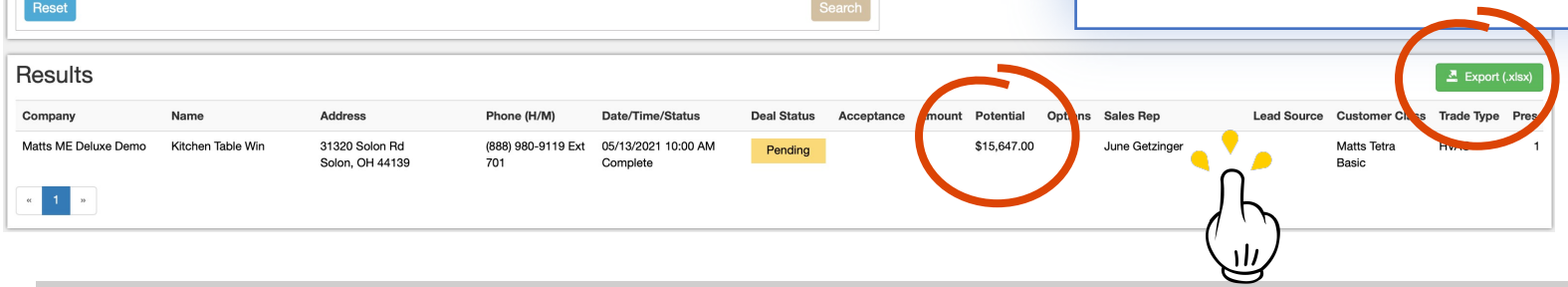
Admin digital signature



SBP Notice Deal Updated

Advanced Deal Search





Narrow the results with Advanced Filters

- Enter Customer Name, Customer #, Job#, Office #, System ID #, Address in text box
- Select date range
- Deal Status
- Sales Rep
- Select a deal

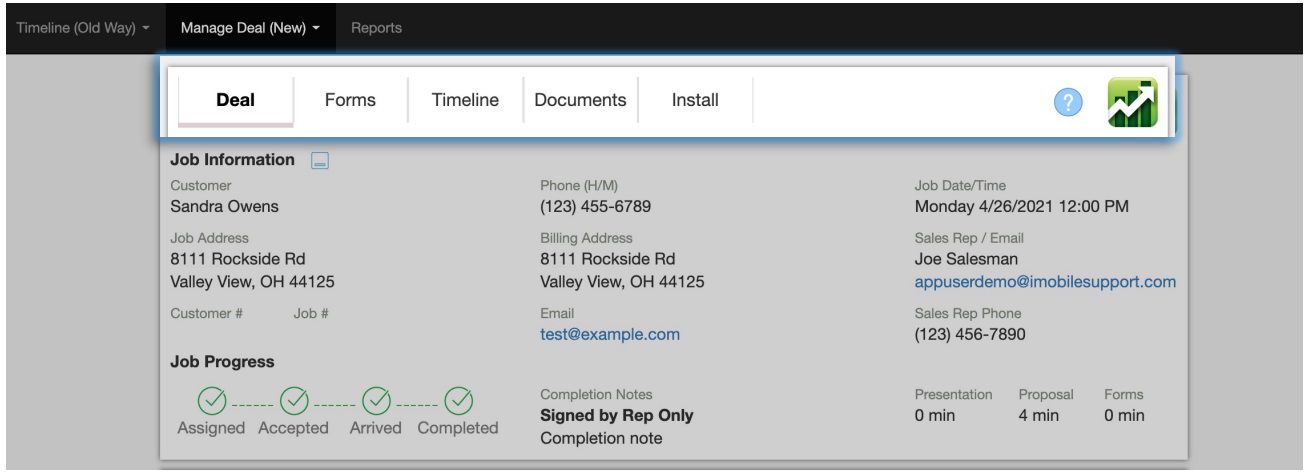
Sales Managers:

Use 2, 7, 30 Day filters to build list of "HOT", "WARM" and "COLD" deals; export the lists.

Note the $ Potential of a deal

Improved Deal Management

- Improved layout to Deal Information
- Same information as the Timeline (Old Way)
- Manage Deal (New) organizes the information into Separate Tabs
- Job information at the top of each tab streamlines communication with your team and the customer

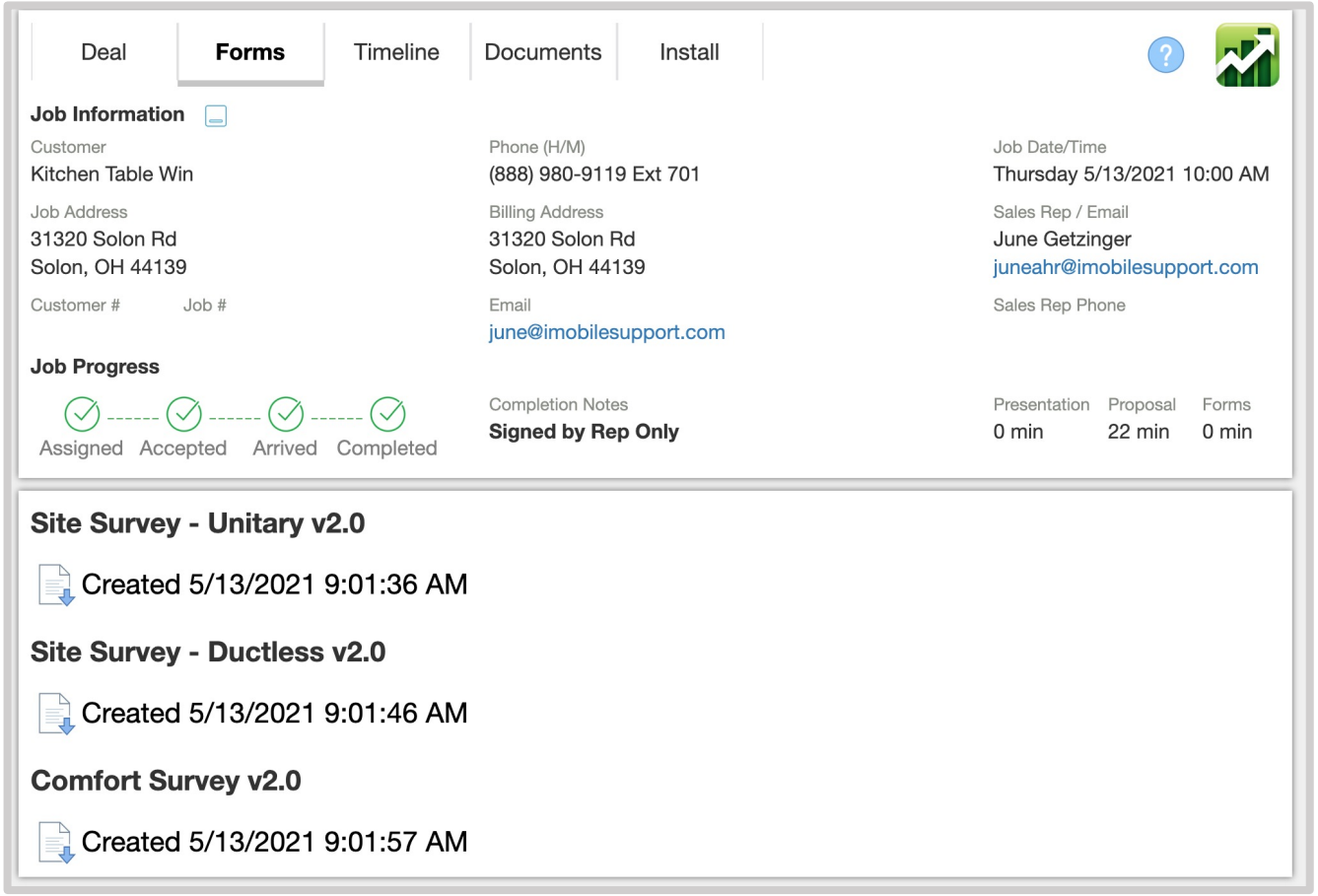


Use the email links to quickly communicate with customers and sales rep

Deal Management

Forms

Download SBP forms associated with the deal.

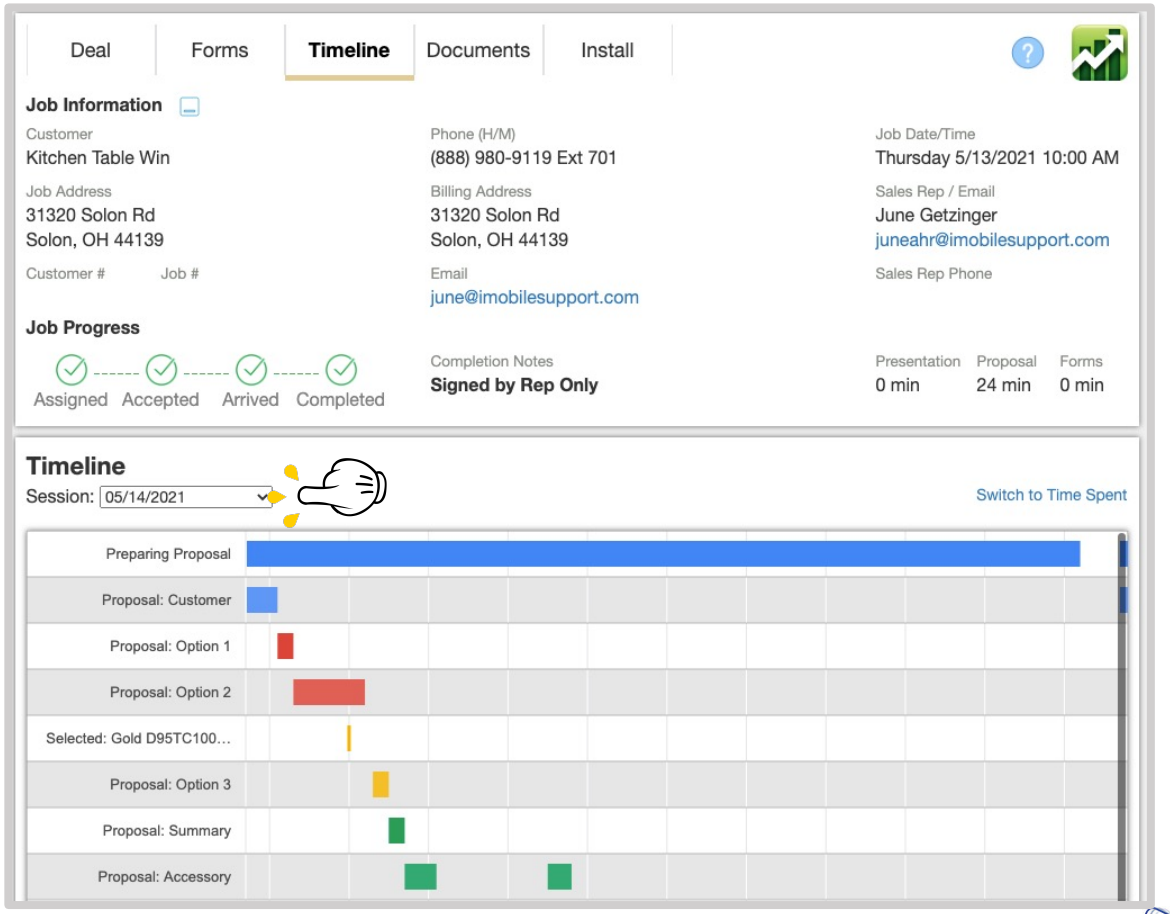


Deal Management

Timeline

New functionality:

Session drop-down allows Managers to select specific sessions.

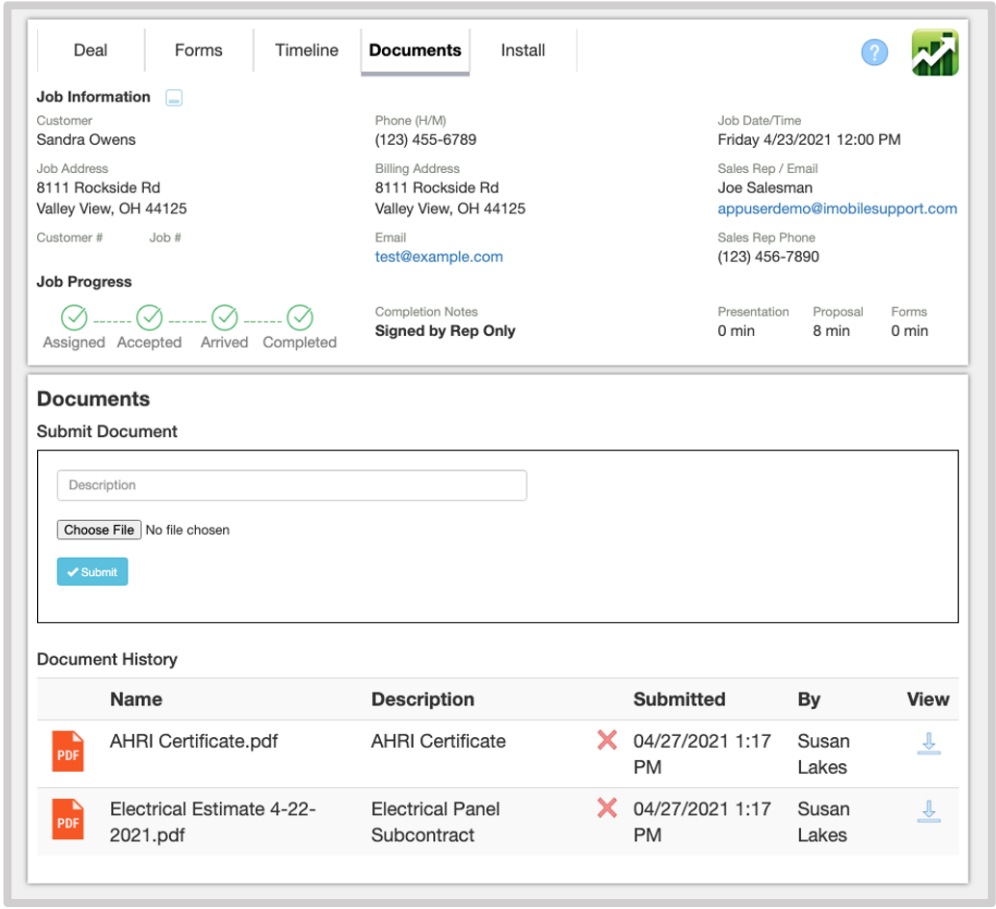


Deal Management

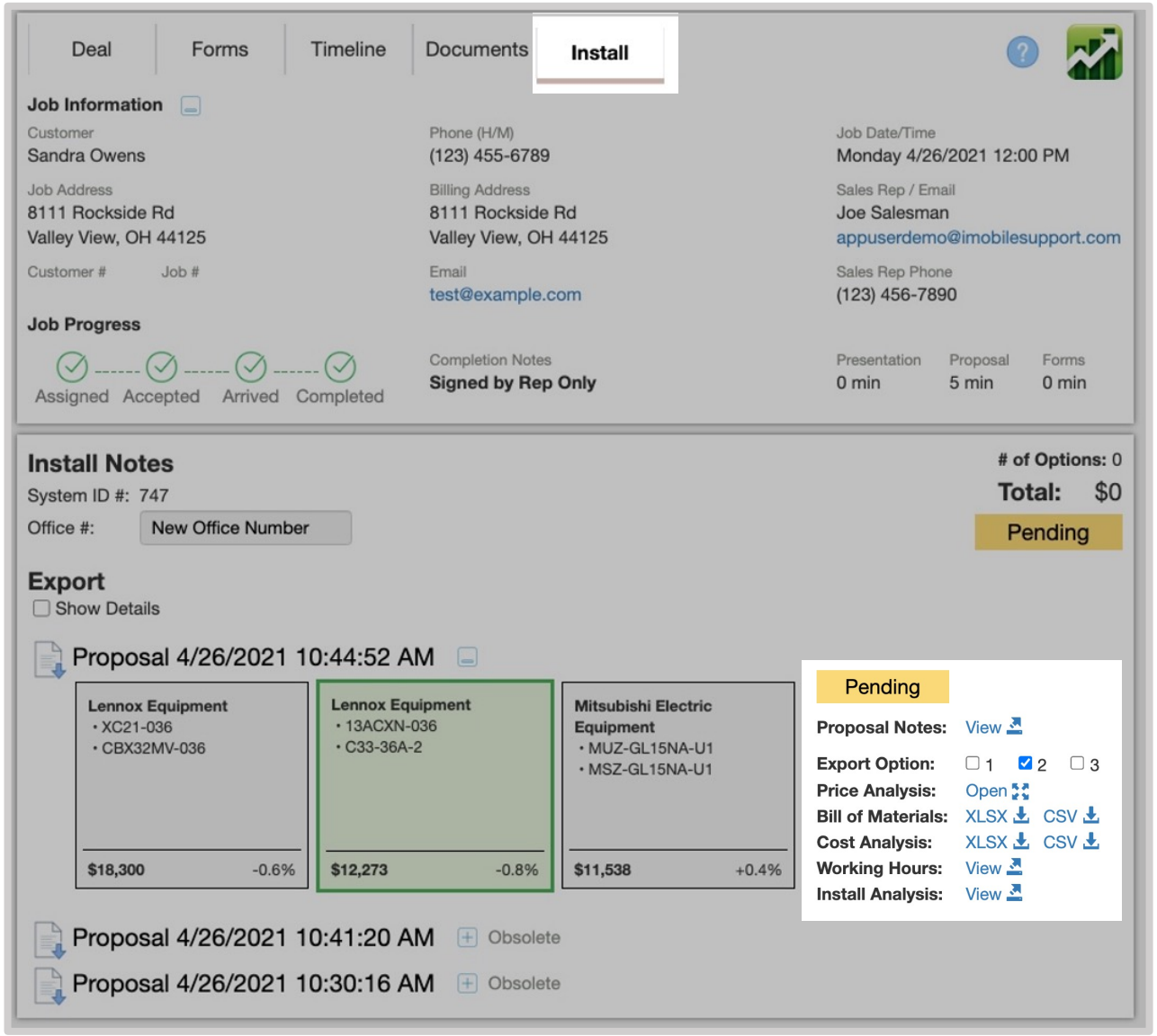
Deal Documents

Store all documents related to the deal in one place:

- AHRI certificates
- Warranties
- Financing Apps
- Customer acceptance docs
- Subcontractor estimates



Deal Management



Install

Download:

- Bill of Materials
- Cost Analysis

View:

- Pricing Analysis
- Proposal Notes
- Working Hours
- Install Analysis