



# CRM Handbook

Notes:

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# CRM App Workflow

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1. Search/Create Customer with Orange plus sign
2. Opportunity Overview
3. Contact Stage
4. Products Stage
5. Measure Stage
6. Quote Stage
7. Won

[ FOR HELP: ]

Support Site:

[www.rfmsapps.zendesk.com](http://www.rfmsapps.zendesk.com)

Email:

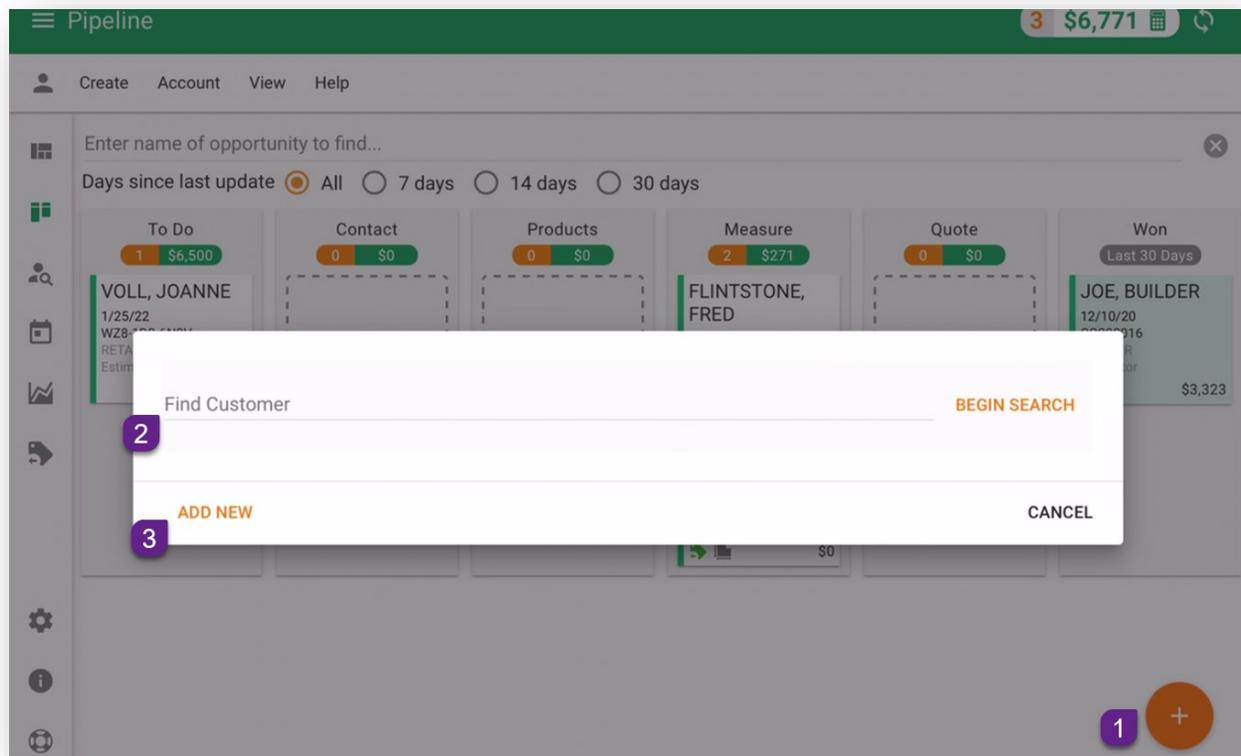
[help@rfms.com](mailto:help@rfms.com)

# Step by step: Opportunity creation to Sale

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1. Select the orange plus sign from the Pipeline screen.
2. Search for an existing customer or choose to enter information for a new one.
3. Under the Opportunity Overview tab select your Ad Source, enter private notes, and any other necessary information for the opportunity.
4. Switch to the Pipeline tab and start chat.
5. Add products and room names under the Product section of the Pipeline.
6. Create measure
7. When the project from Measure Mobile is published back to CRM move to the quote stage.
8. Share quote with the customer via text message or email with My Flooring Link.
9. When the customer has approved the proposal, create an order and move the opportunity to the Won stage.

# Search or Create New Customer



1. Select the orange plus sign to add an opportunity 
2. Enter the customer name to begin search of existing customers
3. Add a new customer to your RFMS directory

# View Opportunity

## Overview Tab

NELSON, LARRY (12/10/20)

OVERVIEW PIPELINE ACTIVITIES CHAT QUESTIONNAIRE HISTORY

Sold To

LARRY NELSON  
989 THIS STREET  
THAT CITY, AL 35006  
123-555-5555  
NELSONL@NELSON.COM

Ship To

LARRY NELSON  
989 THIS STREET  
THAT CITY, AL 35006

Opportunity Name  
1 NELSON, LARRY

Opportunity Number  
Z1Y-041-DGCF

Source  
2 DRIVE BY

Store  
3 MAIN STREET FLOORING ("9")

Estimator  
Sarah Swinney

Measure Date  
11/27/2020

Time  
3:00 PM

Estimated Delivery  
12/28/2020

PO Number

Job Number

Private Notes  
4

Stage  
To Do

Estimated Value  
\$0.00

Salesperson  
Estimator (estimator@webmoe.com)

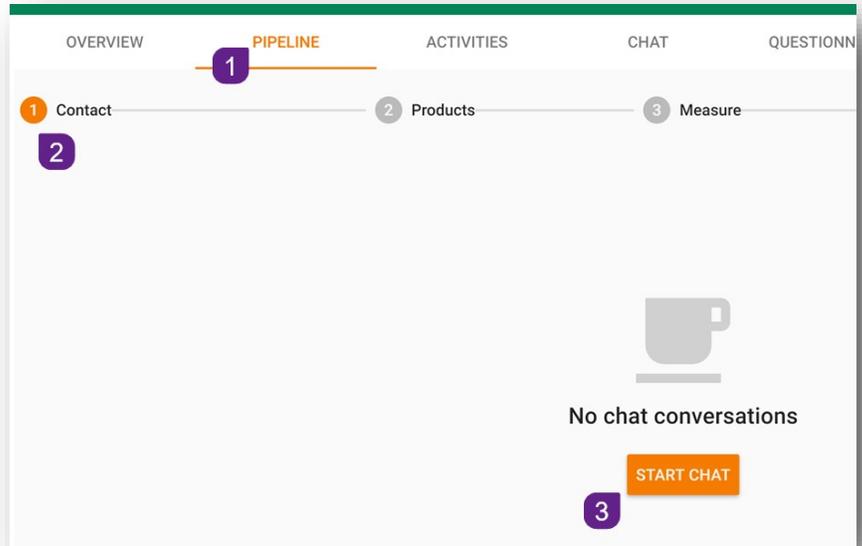
OPEN CUSTOMER DELETE CANCEL SAVE

1. Edit opportunity name
2. Enter ad source
3. Adjust associated store
4. Enter private notes

# Contact Stage

## Opportunity Pipeline

1. Switch to the opportunity **Pipeline** tab
2. Select **Contact** stage
3. Choose **Start Chat**



**Start Chat**

Your Company  
The Flooring Pros

Your Phone  
949-■■■■

Your Name  
Estimator

1 Message

2 Mobile number

Use one of these numbers:

1 ■■■■

CANCEL **3** START

1. Enter a message to the customer
2. Enter a mobile number (or use one listed below)
3. Send the message to start the chat

# Products Stage

## Add Products and Rooms

NELSON, LARRY (2/7/22)

OVERVIEW PIPELINE ACTIVITIES CHAT QUESTIONNAIRE HISTORY

1 Contact — 2 Products — 3 Measure — 4 Quote — 5 Order

OPTION 2

ALL DAY LONG I - 742Z6 - TO BE DETERMINED  
12' - PC: 01 - Supplier: SHAW INDUSTRIES - Manuf: QUEEN 65 \$4.58 / SF

BR1 x BR2 x + Room

ALPINE OAK RUSTIC 3/8X61/2 35.56 - 80737 - TO BE DETERMINED  
7' x 0' - PC: 07 - Supplier: BUILDING PLASTICS, INC. - Manuf: BBOSS \$7.78 / SF

LR x Kit x + Room

Stage Estimated Value Salesperson  
Products \$0.00 Estimator (estimator@webmoe.com)

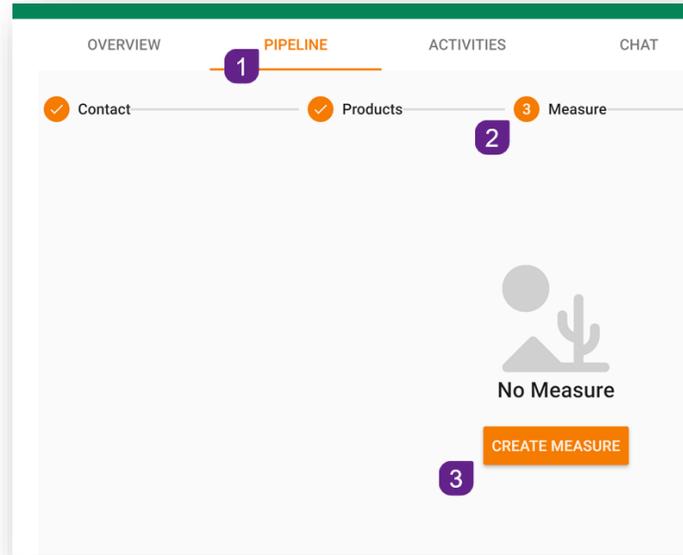
ADD PRODUCT SHARE PRODUCTS CREATE MEASURE CREATE QUOTE CANCEL SAVE

1. Select **Products** stage of the pipeline
2. Begin by adding products
3. Add rooms to the product
4. Edit the Option name if desired
5. Create additional options if needed
6. Check Out/In a product sample
7. Assign product to option(s)
8. Remove product
9. Attach image to product

# Measure Stage

## Opportunity Pipeline

1. Go to the **Pipeline** tab
2. Select the **Measure** stage
3. Choose **Create Measure**



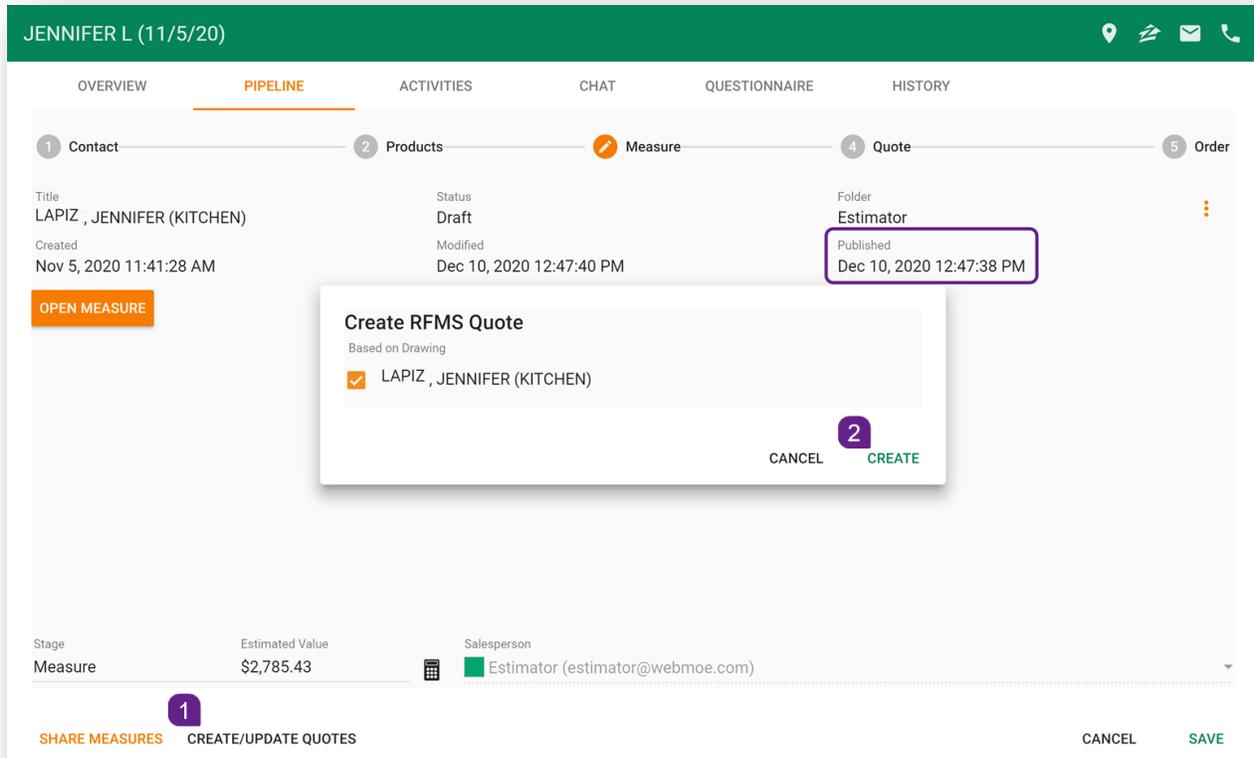
The 'New Measure' form contains the following fields and options:

- Name:** NELSON, LARRY
- Ship To Address:** (dropdown menu)
- Estimator:** Sarah Swinney (highlighted with a purple circle and the number '1')
- Measure Date:** 11/27/2020 (highlighted with a purple circle and the number '2')
- Time:** 3:00 PM (highlighted with a purple circle and the number '3')
- Estimated Delivery:** 12/28/2020
- PO Number:** (text input)
- Job Number:** (text input)
- Private Notes:** (text area, highlighted with a purple circle and the number '5')
- Based on Template:** (radio button selected, highlighted with a purple circle and the number '4')
  - TOP SELLERS
  - ALL PRODUCTS
  - CARPET
- Buttons:** CANCEL and CREATE (highlighted with a purple circle and the number '6')

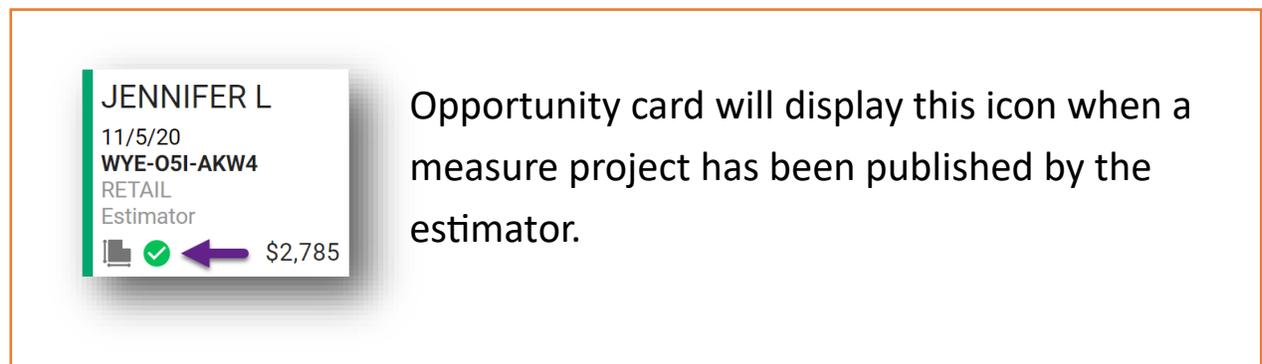
1. Select estimator
2. Select Measure date and time
3. Check estimator availability
4. Select template for project
5. Enter private notes only the estimator will see
6. Create project

# Quote Stage

Create quote after a Measure has been published

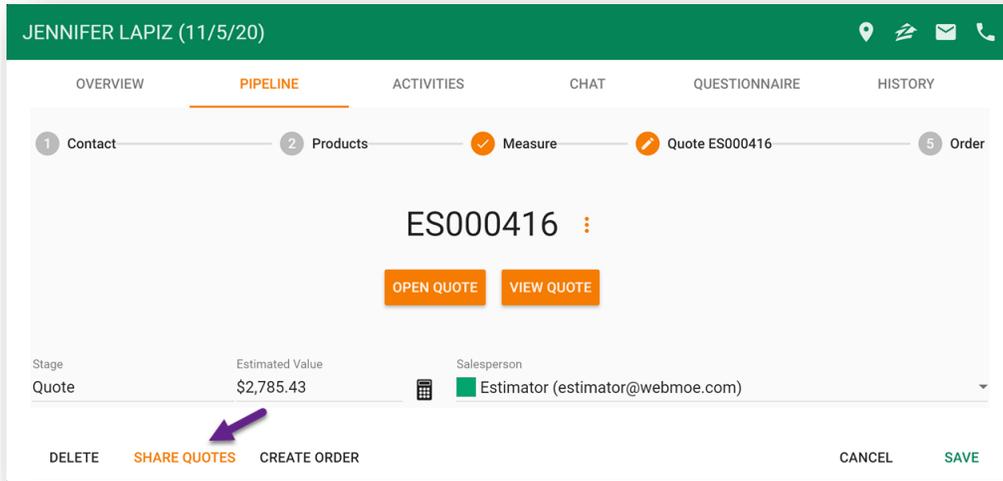


1. From the Measure stage select **Create/Update Quotes**
2. Select the quote you want to turn into an order and choose **Create**

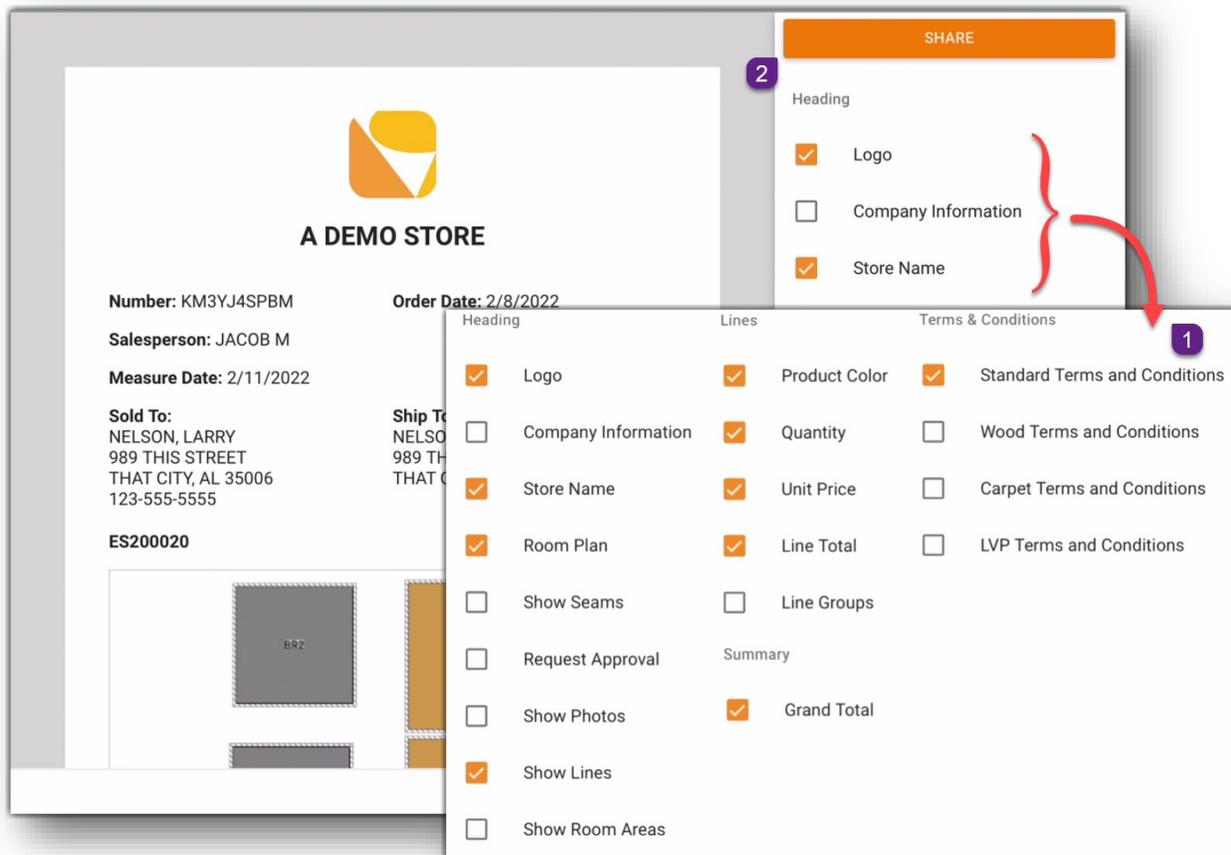


# Quote Stage

## Sharing the Quote for Approval



Select **Share Quotes** from the **Quote** stage of the pipeline.



1. Select options to customize the quote document
2. Tap the **Share** button to send the document to the customer

# Quote Stage

## Sharing the Quote for Approval continued...

### Share

Include this identifying information:

**1** Your company: The Flooring Pros      Your phone: 205-██████████      Your name: JACOB M

Message to the customer with a clickable link to this proposal:

**2** Message: \_\_\_\_\_

**3** Send by:  Text message     Email     Copy link to clipboard

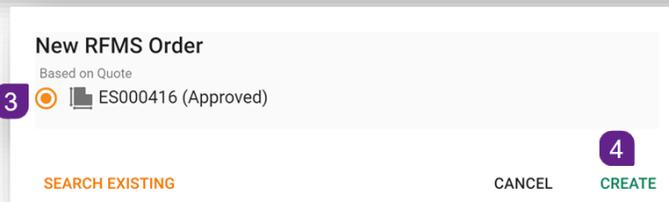
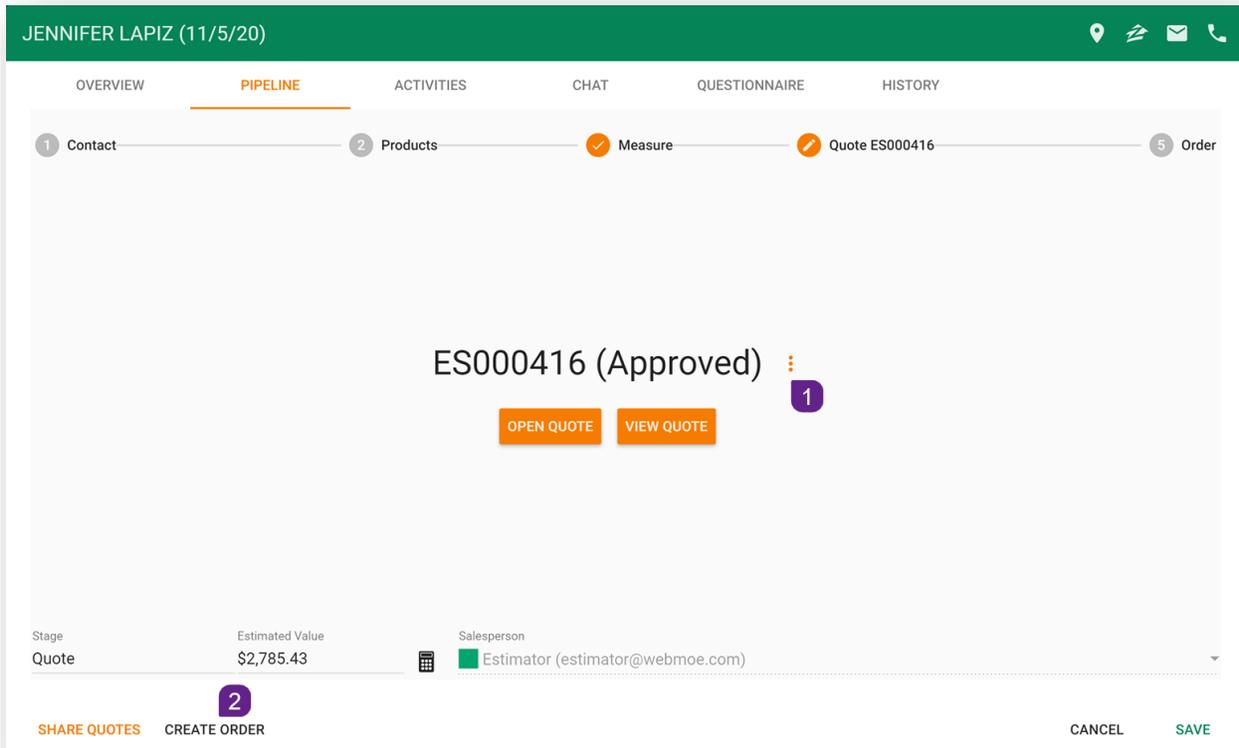
Mobile number: \_\_\_\_\_

Use number from proposal:

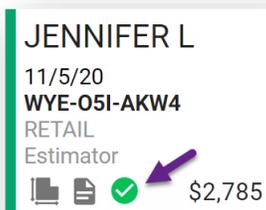
1. Choose to include identifying information to be included in the message
2. Add message to be delivered along with the quote
3. Elect to send through text or email
4. Send to customer

# Create Order

Create an order from approved quote



1. Detach quote or clear approval
2. Create order
3. Select quote to create order from
4. Create order in RFMS



Opportunity card will display this icon when a quote has been approved by customer.