Select Remodeler CRM – Introduction to the CRM

Step 1: Understand How Leads Enter the CRM

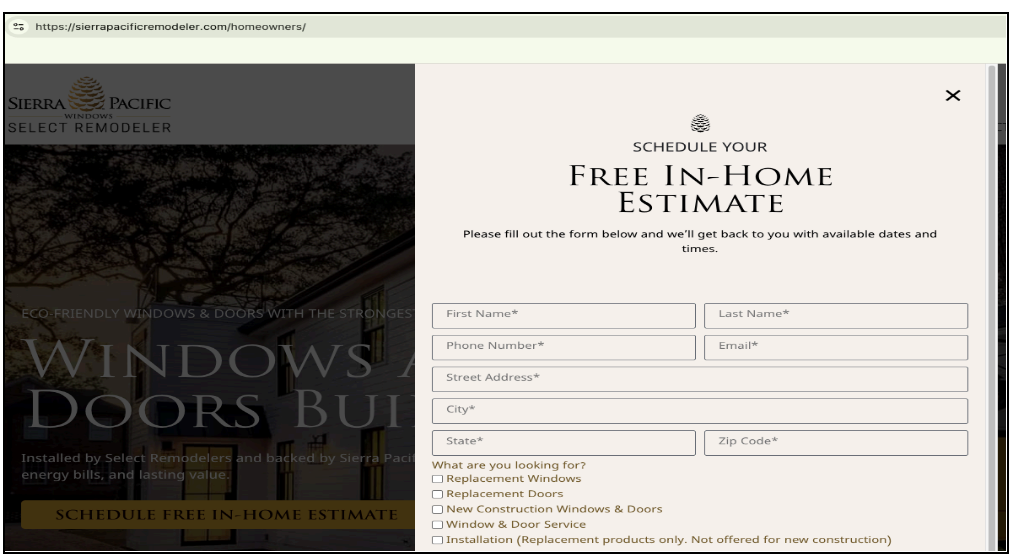
Leads can enter the CRM in **two primary ways**:

Option 1: Leads from the Select Remodeler Website

Most leads will enter the CRM directly from the **SierraPacificRemodeler.com** website. When a homeowner visits the site, they select the **“I am a Homeowner”** pathway, where they can learn more about the Select Remodeler Program and Sierra Pacific Windows products.

Throughout the site, homeowners are prompted to schedule a **free in-home estimate**. When they click this call-to-action, a short form appears requesting their contact information, project details, and where they are in the buying process. Homeowners also have the option to include any additional notes about their project.

Once the form is submitted, the lead is automatically sent into the CRM. The system uses the homeowner’s ZIP code to route the lead to the appropriate region, where a **Territory Manager reviews and assigns the lead** to a Select Remodeler. After assignment, the lead will appear directly on your CRM dashboard.



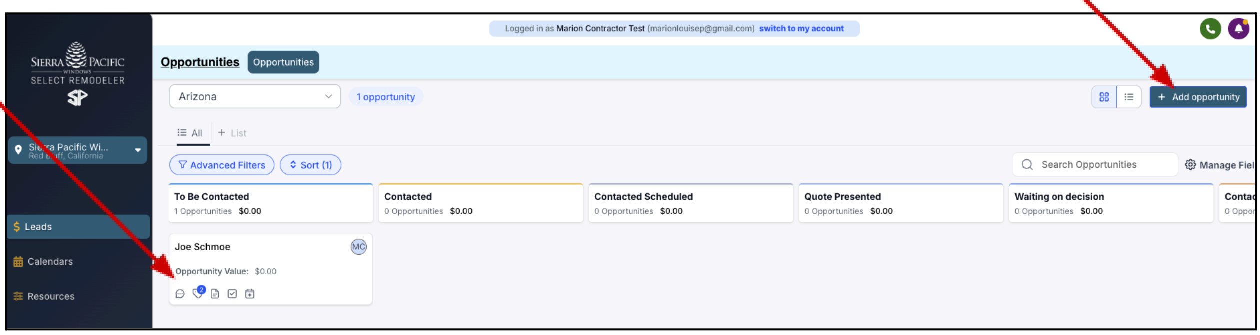
Option 2: Leads Added by a Territory Manager

Territory Managers can also manually add leads, such as:

- Walk-ins
- Call-ins
- Showroom leads
- Referrals

Steps:

1. Territory Manager clicks **Add Opportunity** in the CRM
2. They enter the homeowner's information
3. They assign the lead to a Select Remodeler
4. The lead appears on your dashboard

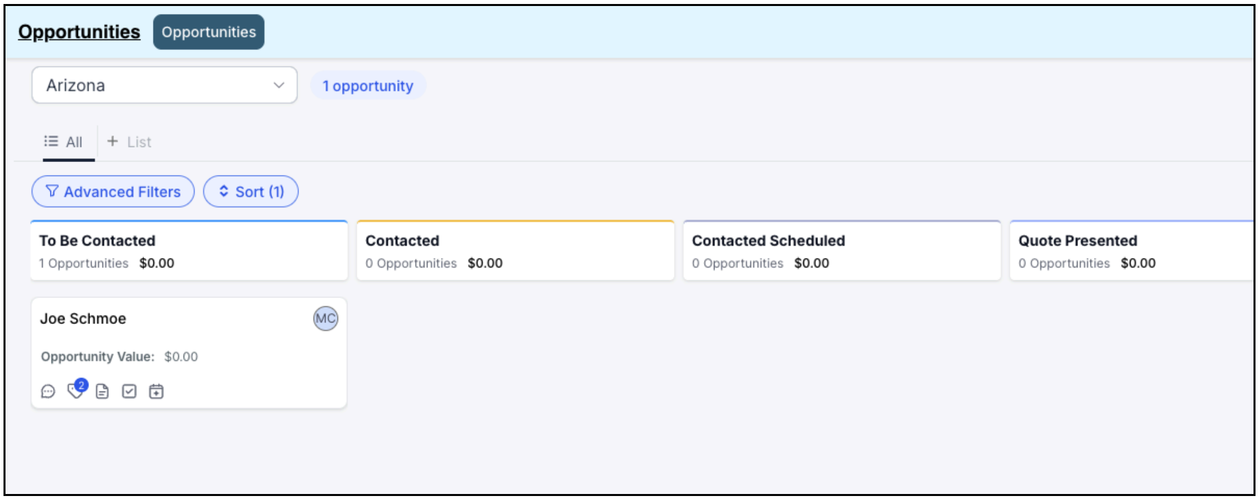


Step 2: View Your Assigned Leads

1. Log into the CRM
2. You will land on the **Dashboard** by default
3. All newly assigned leads appear in the **"To Be Contacted"** stage

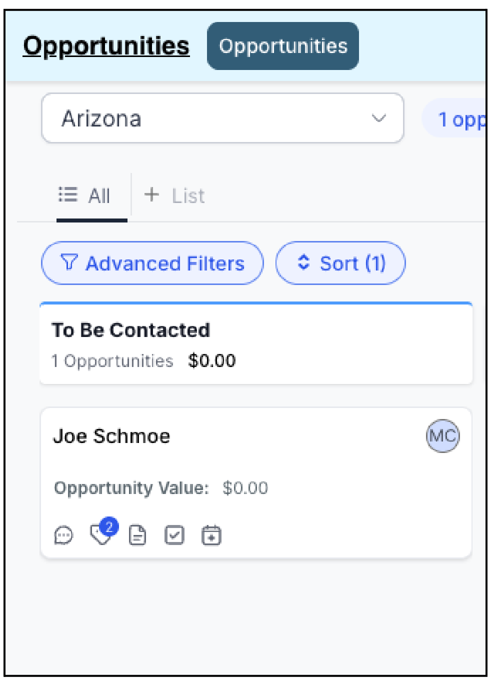
Each column represents a **stage in the sales process**, helping you:

- Stay organized
- Track lead progress
- Share visibility with your Territory Manager



Step 3: Identify New Leads

- Any lead in **"To Be Contacted"** is a **new lead**
- Each lead appears as a **contact card**
- This card contains basic homeowner information and project details

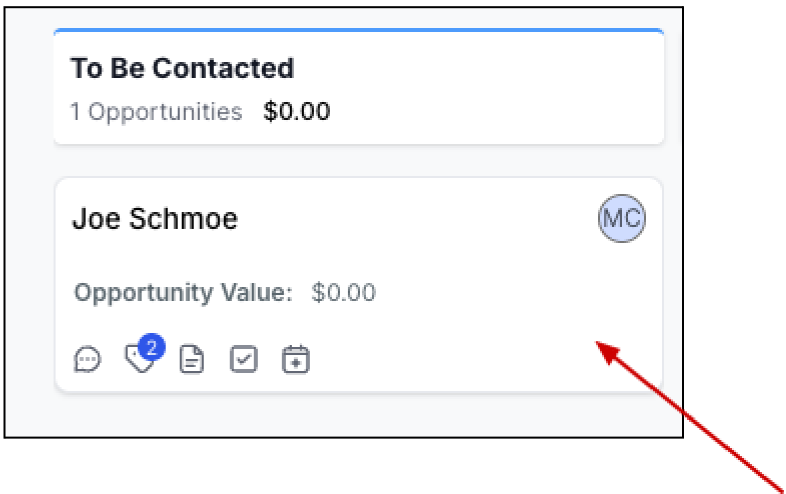


Step 4: Open a Lead (Contact Card)

1. Click **anywhere on the contact card**
    - ❗ Do **not** click directly on the homeowner's name
2. Clicking the card opens the **Opportunity Details**

If you accidentally click the name and see a "no permission" message:

- Simply navigate back to **Leads** on the left-hand menu

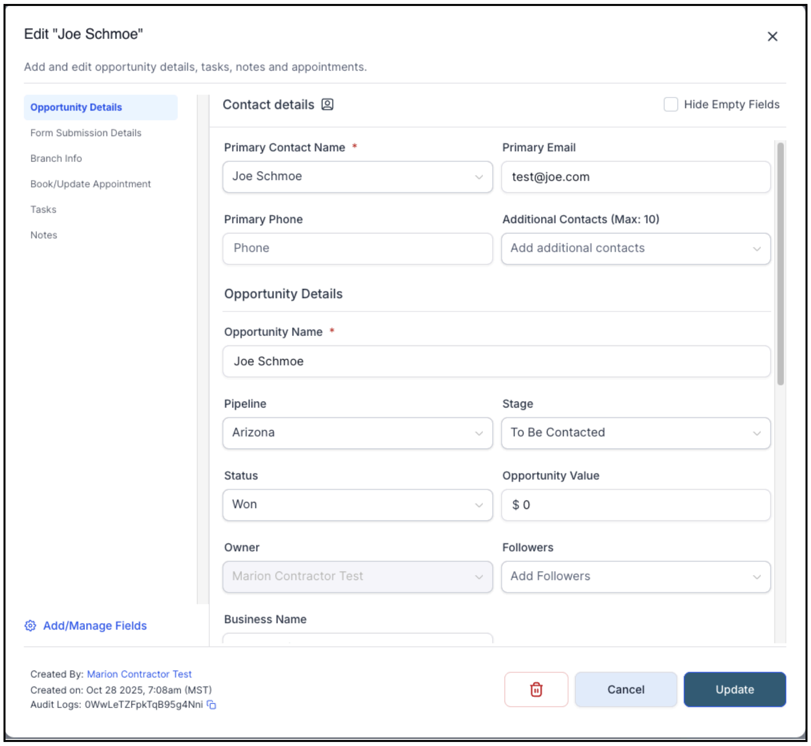


Step 5: Review Opportunity Details (Main Contact Info)

Inside the Opportunity Details, you'll see:

- **Primary Contact Name**
- **Email**
- **Phone Number**
- **Opportunity Name** (usually the homeowner's name)
- **Pipeline** (your region/area)
- **Stage** (where the lead is in the process)
- **Lead Status** (auto-updates based on stage)
- **Opportunity Value**
    - Estimated *product value only* (not install)
- **Owner**
    - Assigned by the Territory Manager (not editable)
- **Job Site Address**
- **Open Notes Field**
    - Can include homeowner notes or internal notes
    - Required if declining a lead

- **Origin of Lead**
  - Automatically filled if from website
  - Manually entered if added by Territory Manager
- **Ship Week**
  - Entered by the Territory Manager

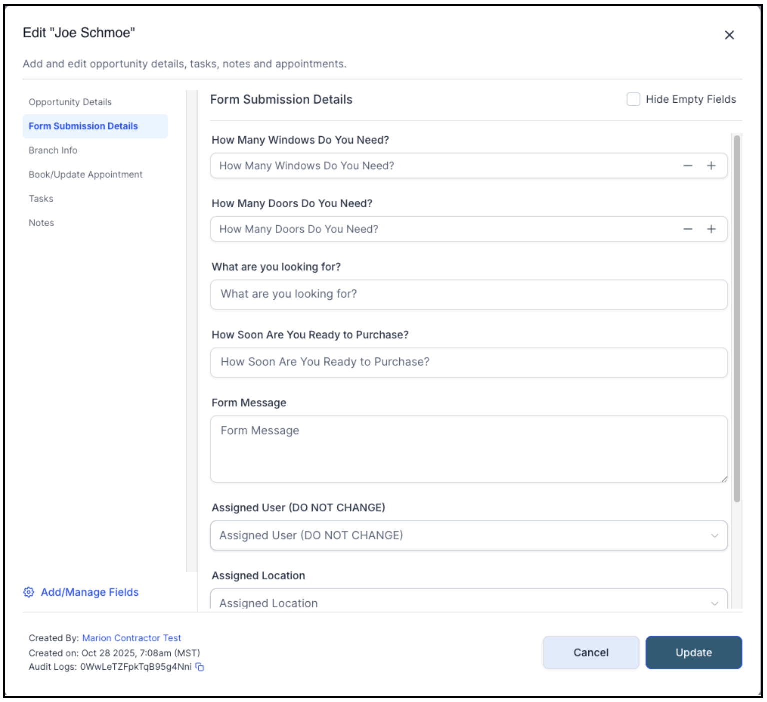


Step 6: Use Additional Lead Tools (Left Menu)

On the left side of the opportunity, you'll find additional tools:

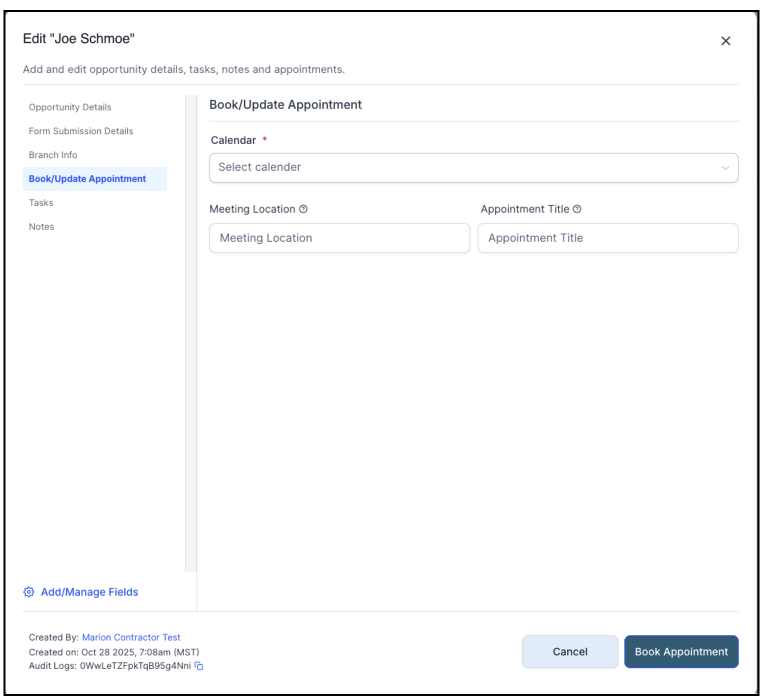
Form Submission Details

- Displays extra info from the website form:
  - Number of windows or doors
  - Product interest
  - Additional homeowner notes



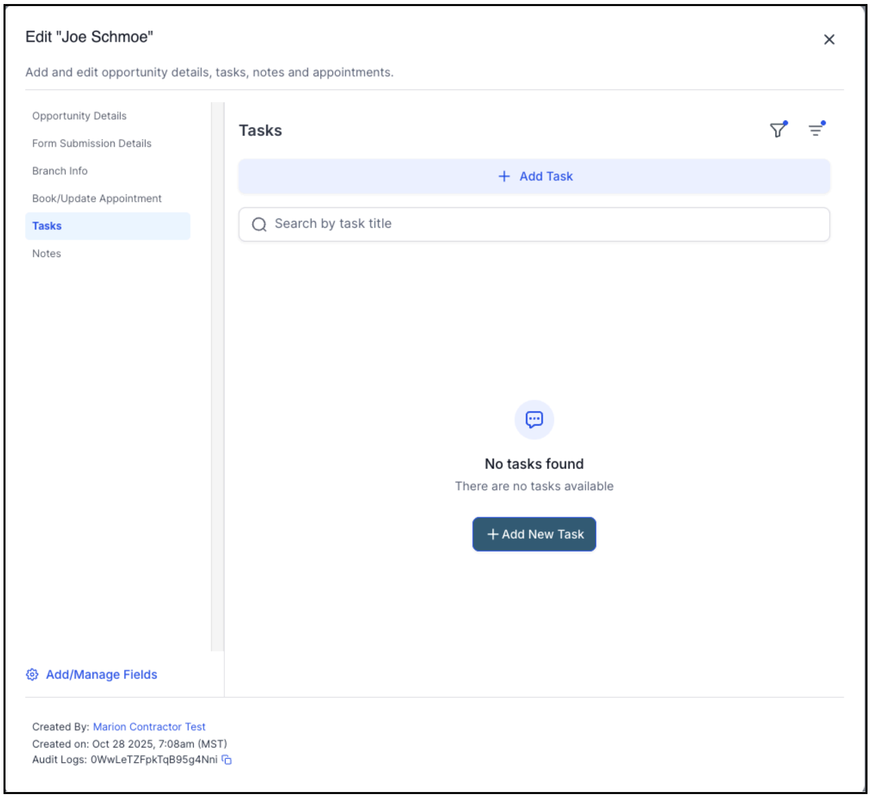
Book / Update Appointment

- Can be used if you connect your calendar to the CRM



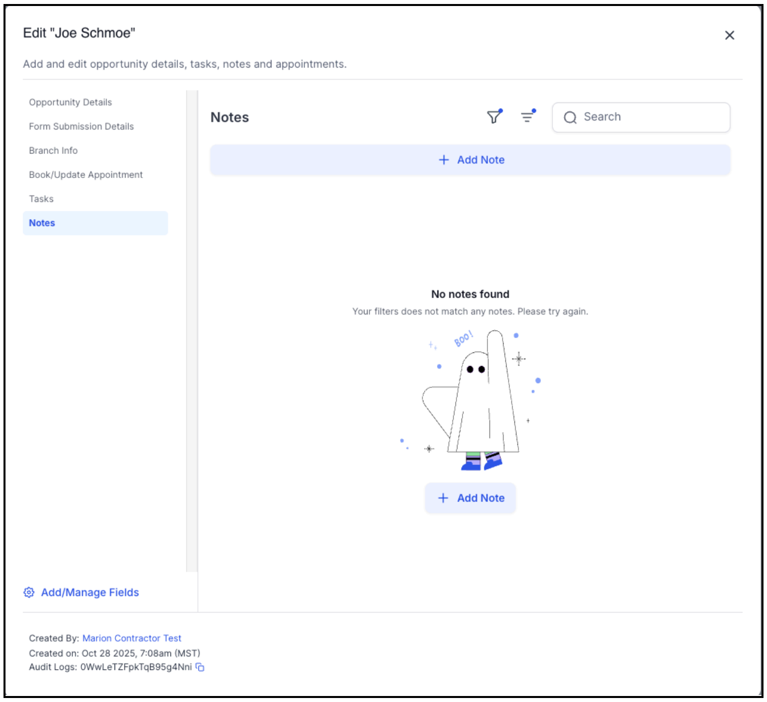
Tasks

- Create internal tasks for yourself or your team
- Helpful if multiple team members share one login



Notes

- Internal notes only
- Useful for:
    - Directions
    - Special requests
    - Customer preferences
    - Follow-up reminders



Step 7: Save Your Changes

- Any time you make a change, the CRM will prompt you to **Save**
- Click **Update** before leaving the screen
- If no changes were made, you can click **Cancel**