



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.

The screenshot shows a web browser window with the URL "https://sierrapacificremodeler.com/homeowners/". The page features the Sierra Pacific Windows Select Remodeler logo on the left. The main content is a form titled "SCHEDULE YOUR FREE IN-HOME ESTIMATE". Below the title, it says "Please fill out the form below and we'll get back to you with available dates and times." The form includes fields for First Name*, Last Name*, Phone Number*, Email*, Street Address*, City*, State*, and Zip Code*. At the bottom, there is a section titled "What are you looking for?" with checkboxes for Replacement Windows, Replacement Doors, New Construction Windows & Doors, Window & Door Service, and Installation (Replacement products only. Not offered for new construction).

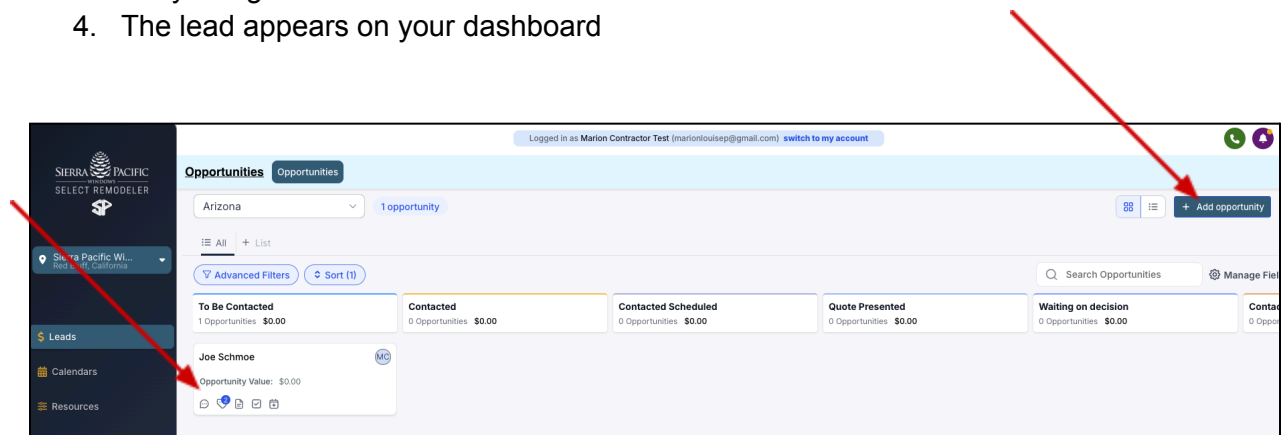
Option 2: Leads Added by a Territory Manager

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

The screenshot shows a dashboard titled "Opportunities" with a sub-tab "Opportunities". A location filter is set to "Arizona" with a count of "1 opportunity". Below this are navigation options: "All" (selected) and "+ List". There are also buttons for "Advanced Filters" and "Sort (1)".

The dashboard is divided into four main categories:

- To Be Contacted:** 1 Opportunities \$0.00
- Contacted:** 0 Opportunities \$0.00
- Contacted Scheduled:** 0 Opportunities \$0.00
- Quote Presented:** 0 Opportunities \$0.00

A detailed card for "Joe Schmo" is shown under the "To Be Contacted" category. It includes a profile picture with initials "MC", the name "Joe Schmo", and "Opportunity Value: \$0.00". At the bottom of the card are icons for chat, a notification badge (2), a document, a checkmark, and a calendar.

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

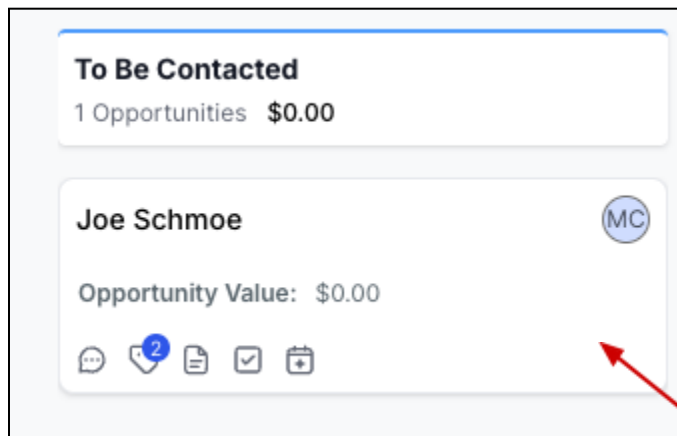
This zoomed-in view focuses on the "To Be Contacted" section. It shows the category header "To Be Contacted" with a count of "1 Opportunities \$0.00". Below this is the contact card for "Joe Schmo", which includes a profile picture with initials "MC", the name "Joe Schmo", and "Opportunity Value: \$0.00". The card also features a row of action icons: a chat bubble, a notification badge with the number "2", a document icon, a checkmark icon, and a calendar icon.

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

Edit "Joe Schmoe"
✕

Add and edit opportunity details, tasks, notes and appointments.

Opportunity Details

Form Submission Details

Branch Info

Book/Update Appointment

Tasks

Notes

[Add/Manage Fields](#)

Created By: Marion Contractor Test
Created on: Oct 28 2025, 7:08am (MST)
Audit Logs: 0WwLeTZfPkTqB95g4Nni

Contact details 🔗
 Hide Empty Fields

Primary Contact Name *
Joe Schmoe

Primary Email
test@joe.com

Primary Phone
Phone

Additional Contacts (Max: 10)
Add additional contacts

Opportunity Details

Opportunity Name *
Joe Schmoe

Pipeline
Arizona

Stage
To Be Contacted

Status
Won

Opportunity Value
\$ 0

Owner
Marion Contractor Test

Followers
Add Followers

Business Name

Created By: Marion Contractor Test
Created on: Oct 28 2025, 7:08am (MST)
Audit Logs: 0WwLeTZfPkTqB95g4Nni

🗑️
Cancel
Update

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

The screenshot shows a web form titled "Edit 'Joe Schmo'" with a close button (X) in the top right corner. Below the title is a subtitle: "Add and edit opportunity details, tasks, notes and appointments." On the left side, there is a vertical navigation menu with the following items: "Opportunity Details", "Form Submission Details" (highlighted in blue), "Branch Info", "Book/Update Appointment", "Tasks", and "Notes". The main content area is titled "Form Submission Details" and includes a "Hide Empty Fields" checkbox. The form contains several sections: "How Many Windows Do You Need?" with a numeric input field and minus/plus buttons; "How Many Doors Do You Need?" with a numeric input field and minus/plus buttons; "What are you looking for?" with a text input field; "How Soon Are You Ready to Purchase?" with a text input field; "Form Message" with a large text area; "Assigned User (DO NOT CHANGE)" with a dropdown menu; and "Assigned Location" with a dropdown menu. At the bottom left, there is a link "Add/Manage Fields". At the bottom right, there are "Cancel" and "Update" buttons. At the very bottom, there is a footer with the text: "Created By: Marion Contractor Test", "Created on: Oct 28 2025, 7:08am (MST)", and "Audit Logs: 0WwLeT2FpkTqB95g4Nni" with a link icon.

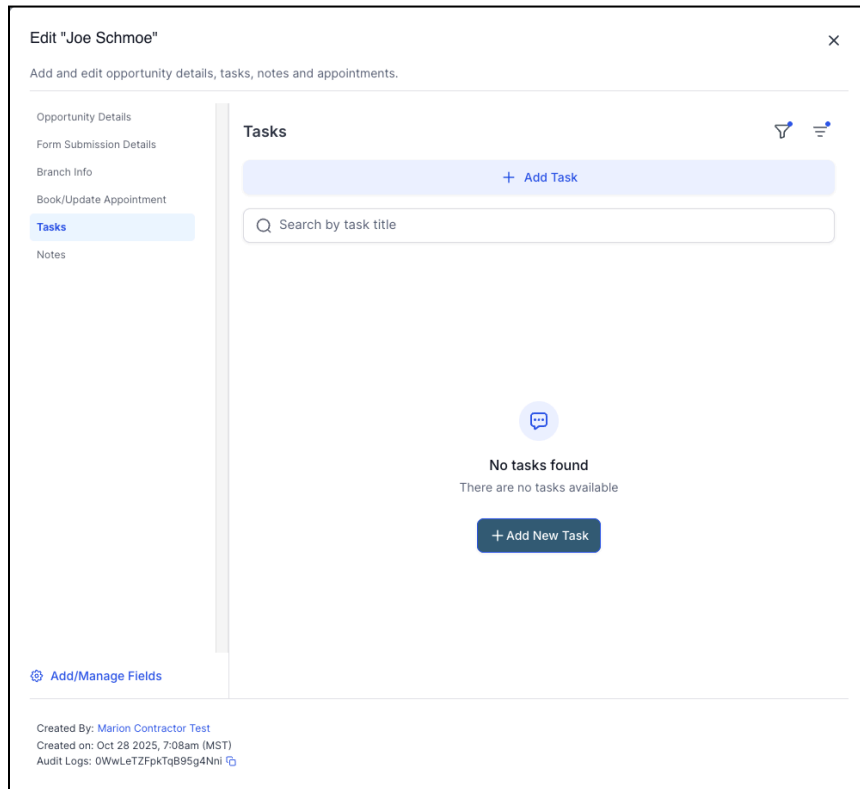
Book / Update Appointment

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

The screenshot shows the same "Edit 'Joe Schmo'" form, but with the "Book/Update Appointment" section selected in the left navigation menu. The main content area is titled "Book/Update Appointment" and includes a "Calendar" dropdown menu with a red asterisk and the text "Select calendar". Below this are two input fields: "Meeting Location" and "Appointment Title", both with a clear icon (X) to their right. At the bottom left, there is a link "Add/Manage Fields". At the bottom right, there are "Cancel" and "Book Appointment" buttons. The footer text at the bottom is identical to the previous screenshot: "Created By: Marion Contractor Test", "Created on: Oct 28 2025, 7:08am (MST)", and "Audit Logs: 0WwLeT2FpkTqB95g4Nni" with a link icon.

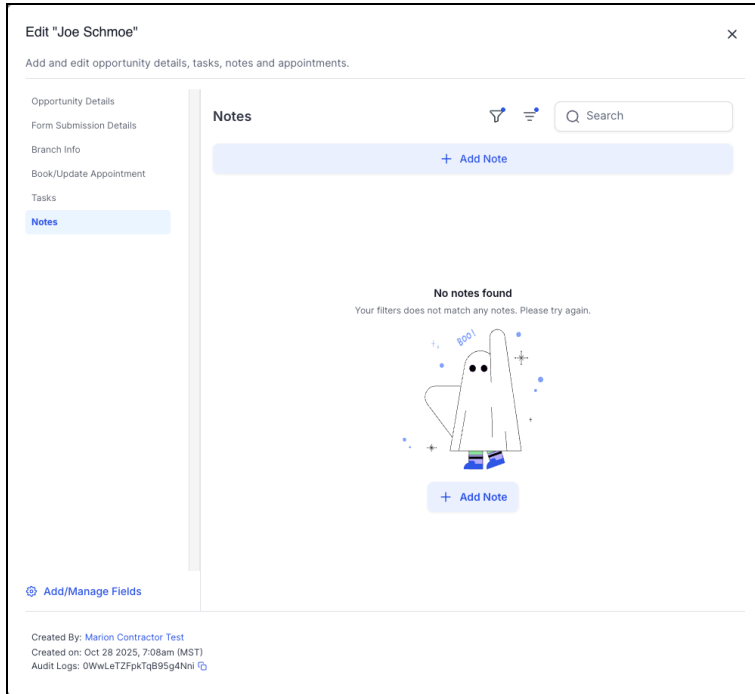
Tasks

- 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**

