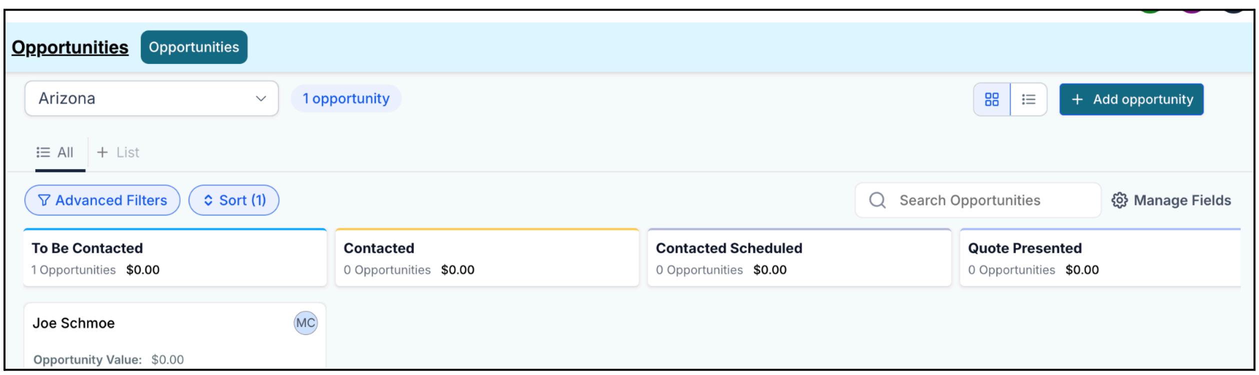
Select Remodeler CRM – Managing & Filtering Leads

Step 1: Understand the Lead Stages

When a new lead is assigned to you, it will appear in the **"To Be Contacted"** stage. The CRM uses stages to help you track where each lead is in the sales process and keep both you and your Territory Manager aligned.

Each stage represents a specific point in your follow-up or sales process, and leads are moved forward as progress is made.



Step 2: Contact a New Lead

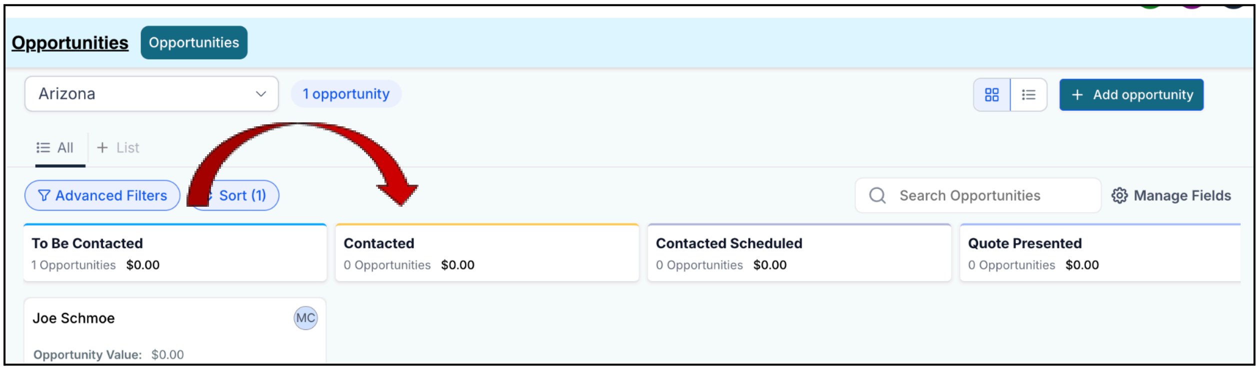
1. Locate the lead in the **"To Be Contacted"** column
2. Open the contact card to view phone number and email
3. Reach out to the homeowner

If the homeowner does **not answer** and you leave a voicemail:

- Leave the lead in the **Contacted** stage until you successfully reach them

Once you have made contact, click, drag, and drop the lead into the **Contacted** stage.

💡 *Best Practice:*
It's strongly recommended to contact new leads **within 24 hours** of receiving them. The longer a lead waits, the more likely they are to move on.

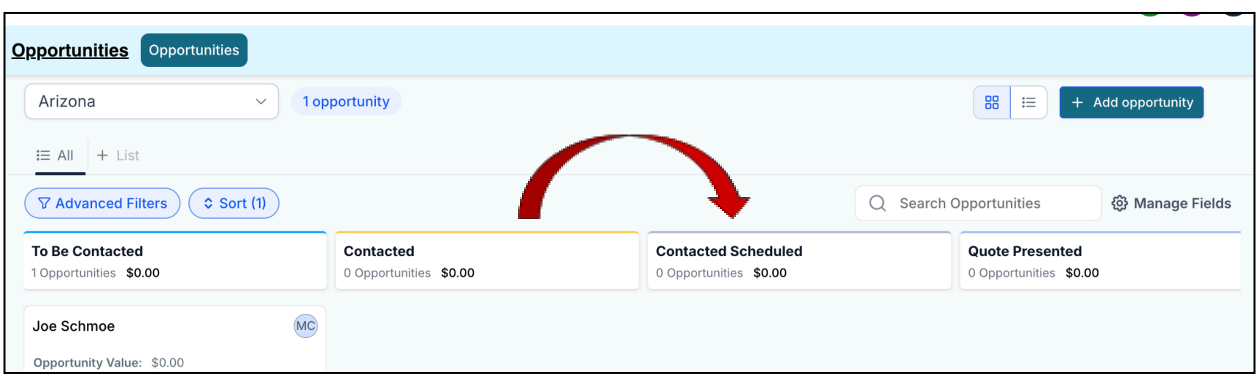


Step 3: Schedule the In-Home Appointment

Once you have successfully spoken with the homeowner and scheduled an in-home appointment:

- Click and drag the lead into the **Contacted** stage (if not already there)

This lets your Territory Manager know the lead has been acknowledged and is actively being worked.



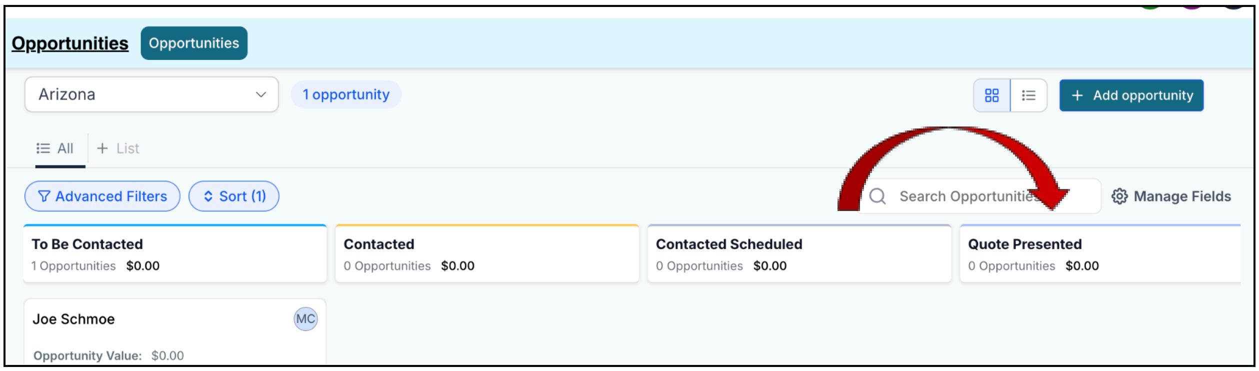
Step 4: Present the Quote

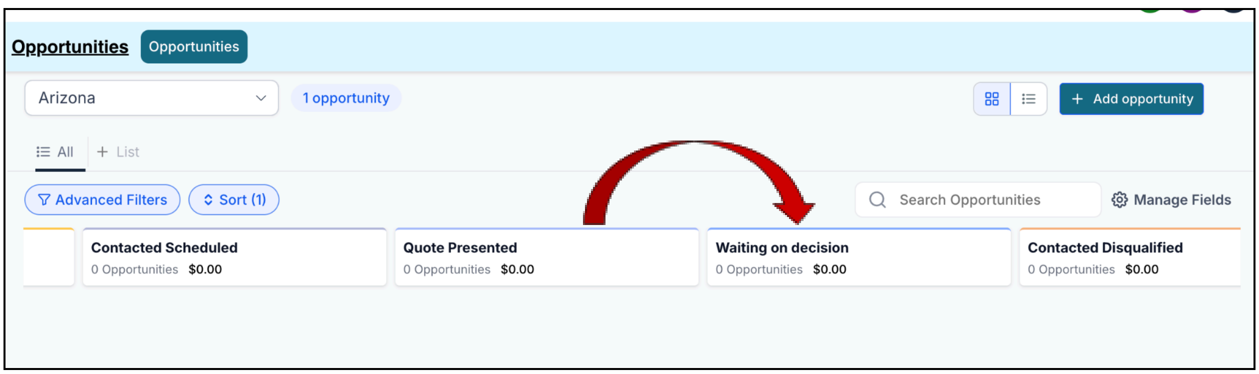
After you've completed the in-home visit and presented pricing:

1. Move the lead into **Quote Presented**
2. Leave it in this stage while the homeowner reviews their options

If the homeowner needs additional time to decide:

- Move the lead to **Waiting on Decision**





Step 5: Close Out a Lead

There are **three stages** that close out a lead:

Won

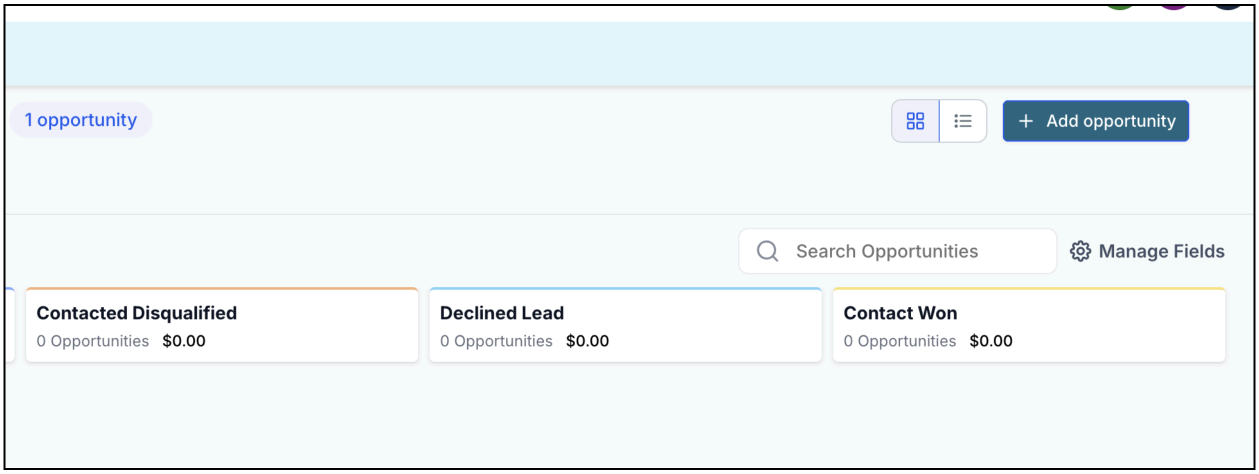
- Use when you successfully close the sale

Contacted – Disqualified

- Use when the project does not qualify for the Select Remodeler Program (Example: screen repair or non-covered service)

Declined Lead

- Use when *you* choose not to take the project, such as:
  - Outside your service area
  - Outside your product focus
  - Better suited for another Select Remodeler

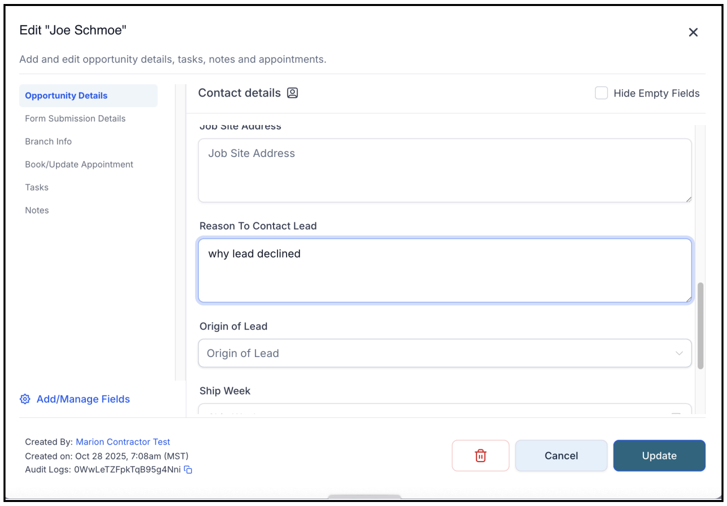


Step 6: Add a Reason When Declining or Disqualifying

When moving a lead to **Disqualified** or **Declined Lead**:

1. Open the contact card
2. Enter the reason in the **open text field**
3. Save your changes

This information is required and ensures your Territory Manager understands why the lead was not pursued.



Step 7: Understand Why Leads Disappear from the Board

By default, the CRM only shows **open leads**.
When a lead is moved to:

- Won
- Disqualified
- Declined

…it is marked as **closed** and removed from the dashboard to keep your view clean.

Step 8: Show Closed Leads Using Advanced Filters (Optional)

If you prefer to continue seeing closed leads:

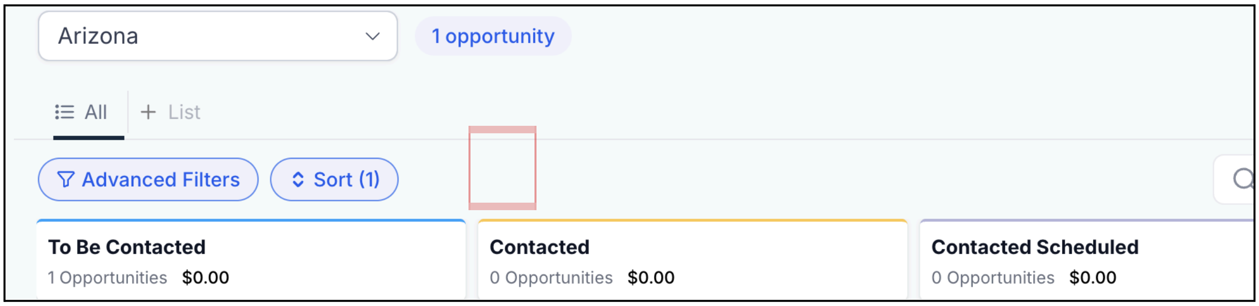
1. Click **Advanced Filters**
2. Select **Edit** (pencil icon)
3. Check the status you want to see (Won, Closed, etc.)
4. Click **Apply**

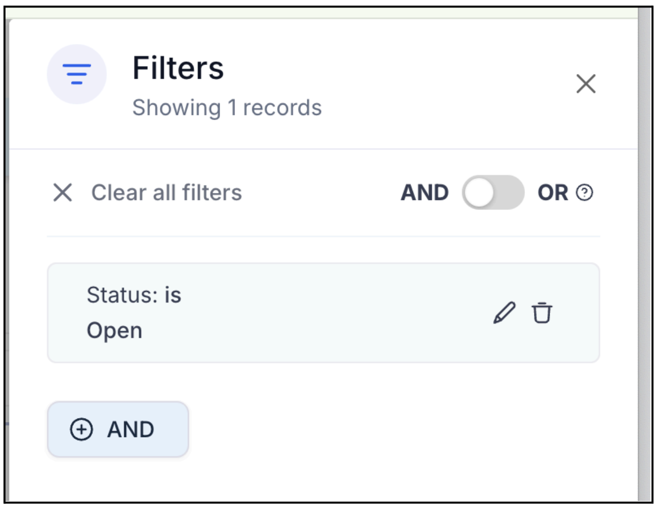
The lead will now remain visible on your board.

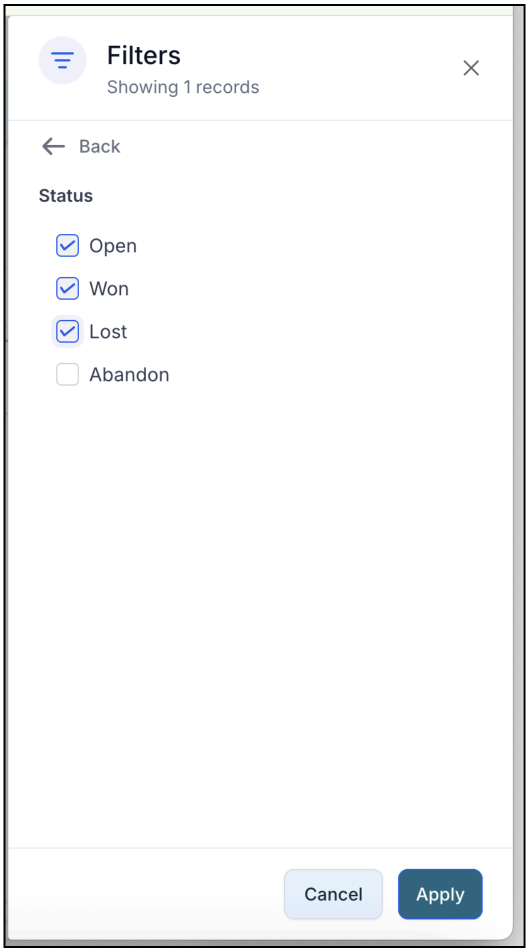
To revert:

- Return to Advanced Filters

- Uncheck the status
- Click Apply







Step 9: Change How You View Your Leads (Icon vs. List View)

The CRM offers two viewing options:

Icon View (Default)

- Visual, column-based
- Best for drag-and-drop lead management

List View

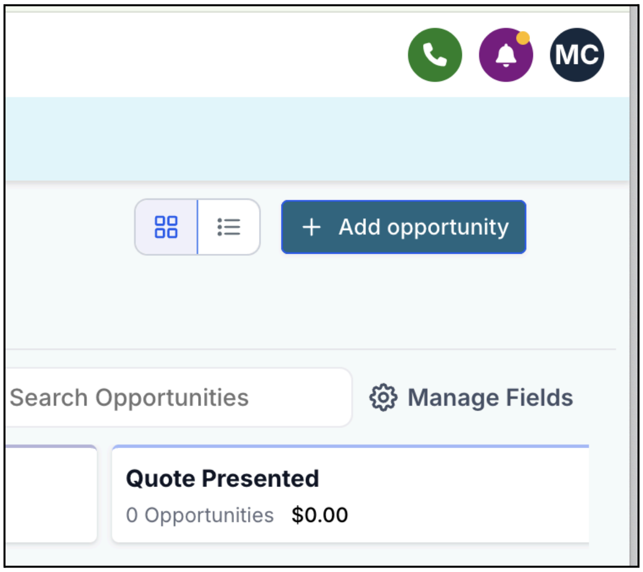
- Displays leads in a table format
- Same information, different layout

To switch views:

1. Use the view icons next to **Add Opportunity**
2. Select your preferred view

You can still:

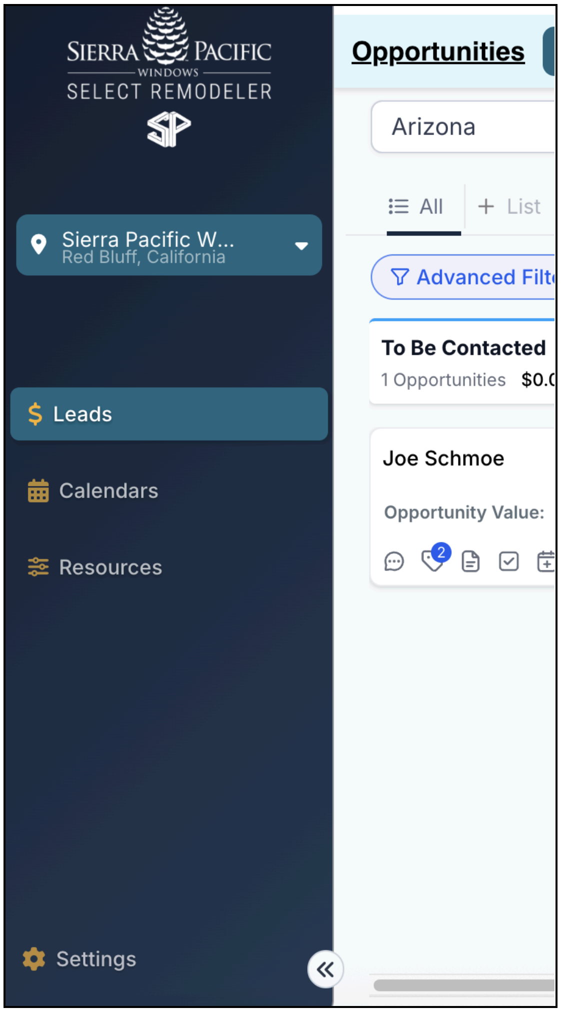
- Open lead details
- Edit stages
- Update information in either view



Step 10: Schedule Appointments Using the CRM Calendar (Optional)

Connect Your Calendar

1. Go to **Settings** in the left-hand menu
2. Select **Calendar Settings**
3. Connect your Gmail, Outlook, or other calendar
4. Save and return to the CRM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WINDOWS
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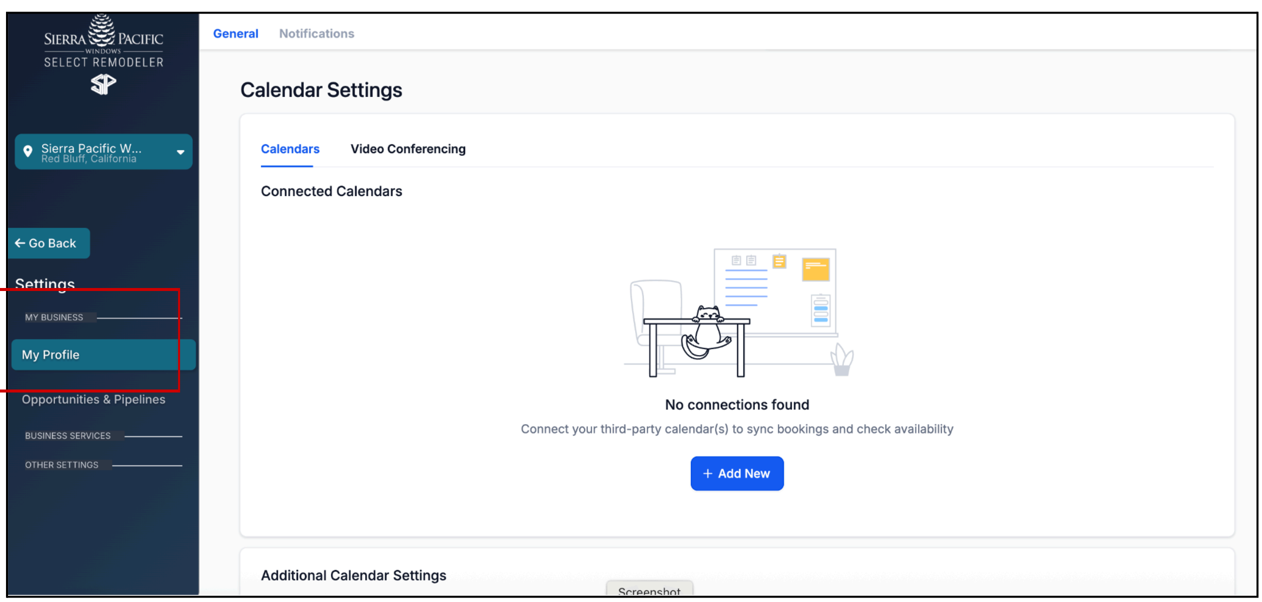
SIERRA PACIFIC
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Settings
MY BUSINESS
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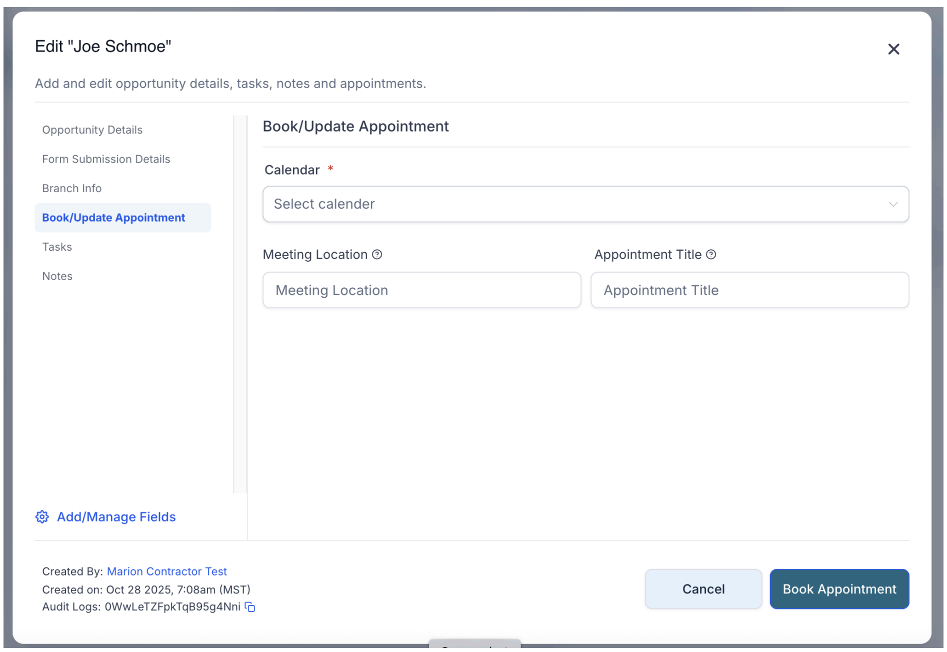
Opportunities & Pipelines
BUSINESS SERVICES
OTHER SETTINGS
General
Notifications
Calendar Settings
Calendars
Video Conferencing
Connected Calendars
No connections found
Connect your third-party calendar(s) to sync bookings and check availability
+ Add New
Additional Calendar Settings
Screenshot

Book an Appointment from a Lead

1. Open the lead
2. Select **Book or Update Appointment**
3. Choose:
    - Calendar
    - Date & time
    - Location
    - Appointment title
4. Click **Book Appointment**

The appointment will:

- Appear on your connected calendar
- Display directly on the lead card for easy reference



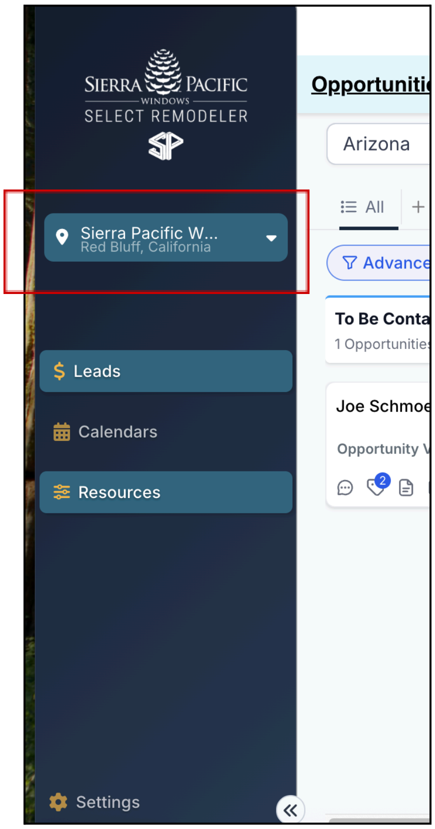
Step 11: Access Resources

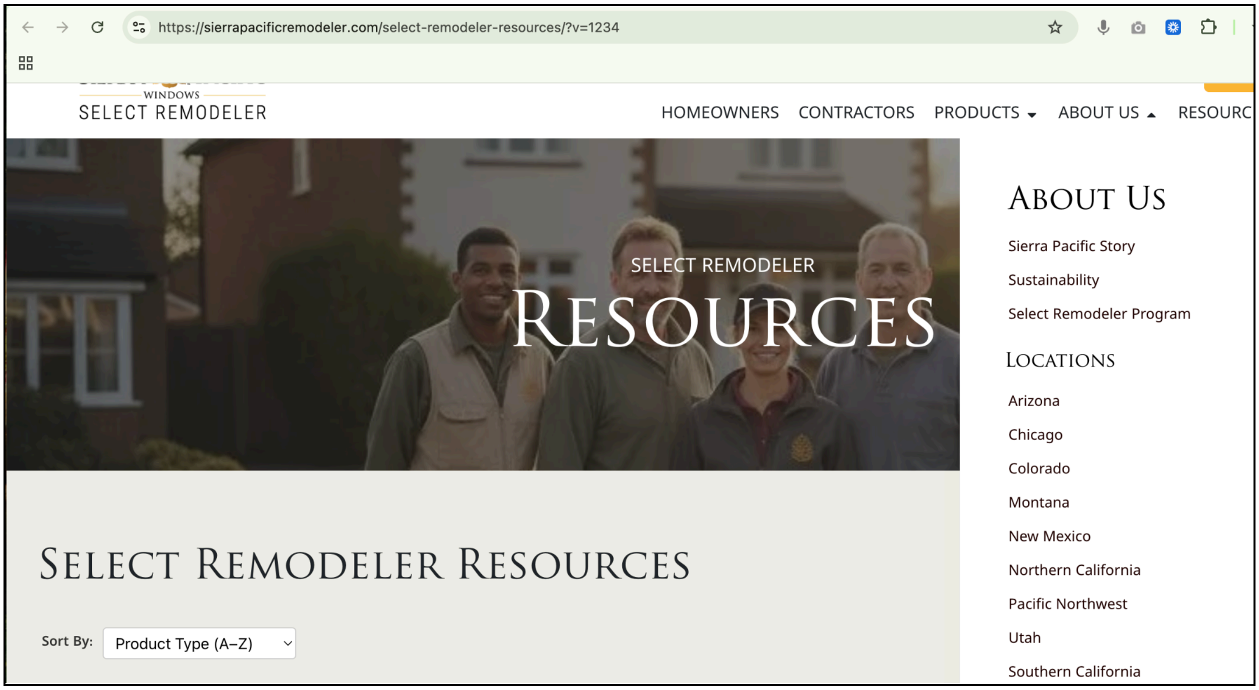
1. Click **Resources** in the left-hand menu
2. You'll be taken to an external resource page containing:
    - Installation guides
    - Architectural design manuals
    - Brochures
    - Spec sheets

Use filters to narrow results by:

- Product type
- Resource category

All resources are downloadable PDFs.





Main Menu Overview

- **Leads** – Default landing page and primary workspace
- **Calendar** – View and manage scheduled appointments
- **Resources** – Access Sierra Pacific reference materials