



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.

The screenshot shows the 'Opportunities' section of a CRM. At the top, there's a header with 'Opportunities' and a sub-header 'Opportunities'. Below that, there's a filter for 'Arizona' with a dropdown arrow and a badge indicating '1 opportunity'. To the right, there are icons for grid/list view and a '+ Add opportunity' button. Below the filter, there are 'All' and '+ List' options. Further down, there are 'Advanced Filters' and 'Sort (1)' buttons. A search bar labeled 'Search Opportunities' and a 'Manage Fields' button are also present. The main content area shows four columns representing lead stages: 'To Be Contacted' (1 Opportunity, \$0.00), 'Contacted' (0 Opportunities, \$0.00), 'Contacted Scheduled' (0 Opportunities, \$0.00), and 'Quote Presented' (0 Opportunities, \$0.00). Below these columns, there's a card for 'Joe Schmoe' with a 'MC' tag and 'Opportunity Value: \$0.00'.

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

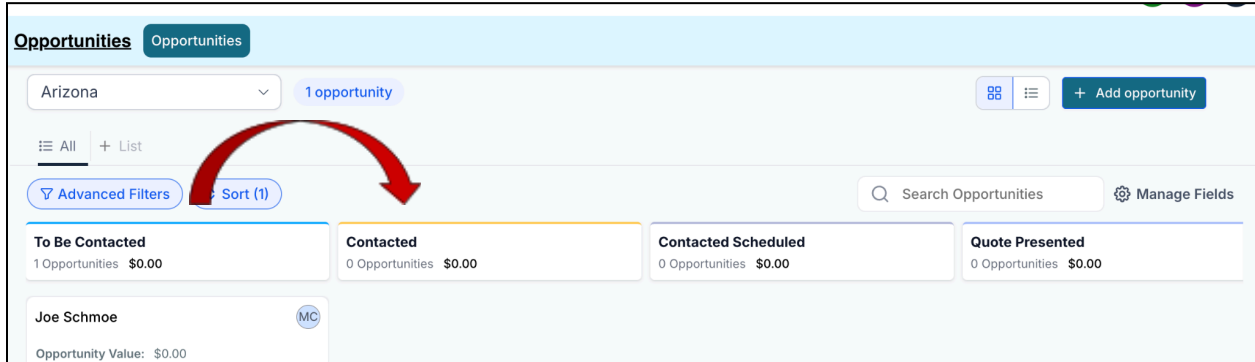
If the homeowner does **not answer** and you leave a voicemail:

- 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.

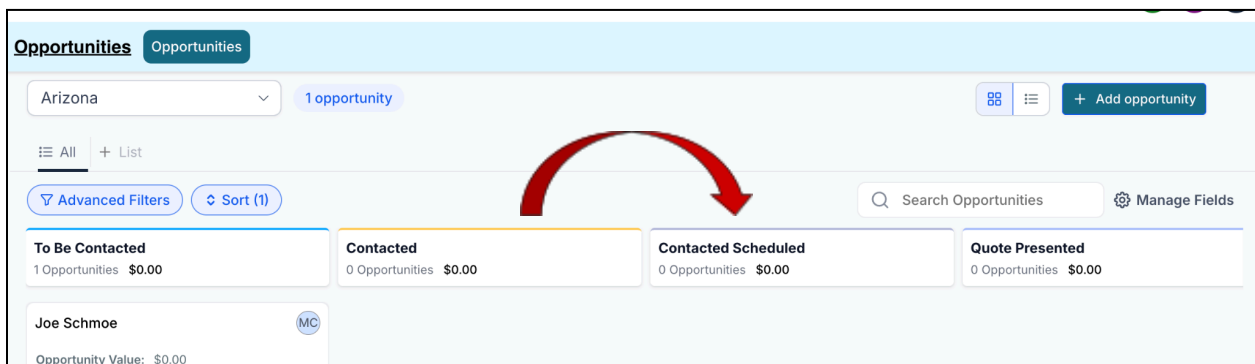


Step 3: Schedule the In-Home Appointment

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.



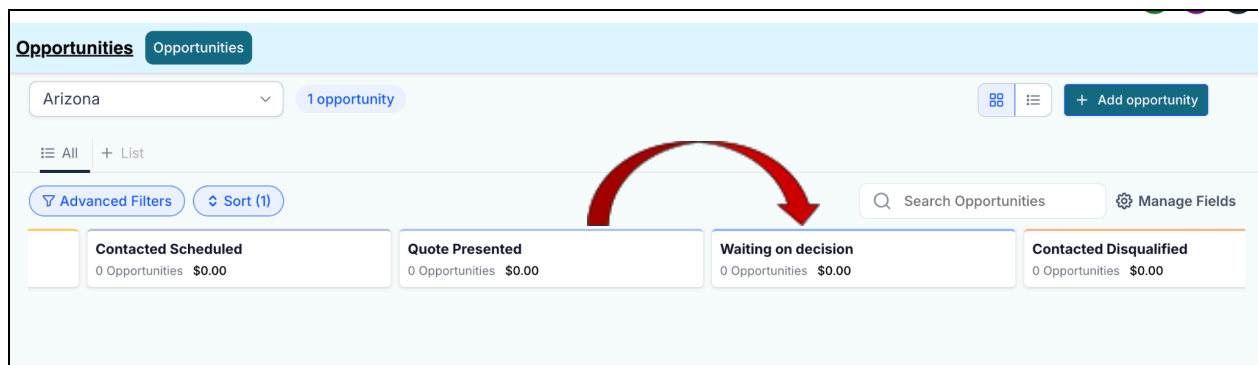
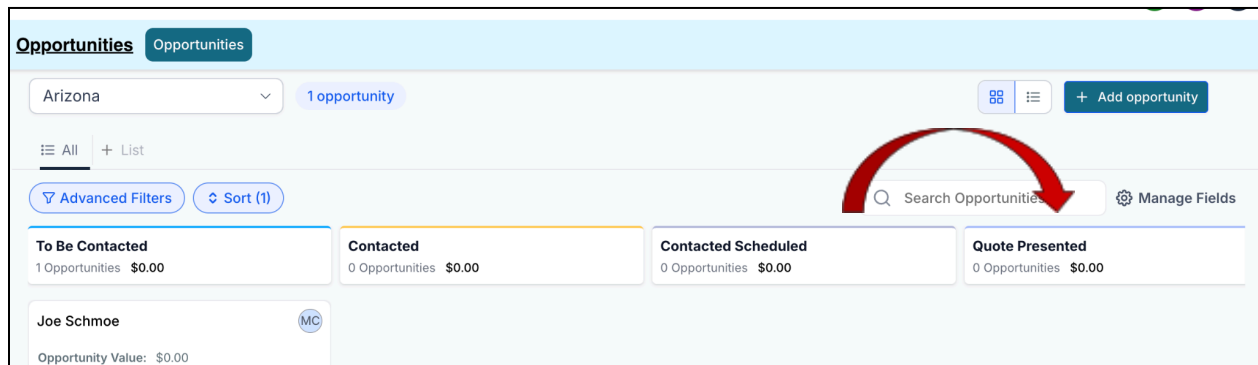
Step 4: Present the Quote

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

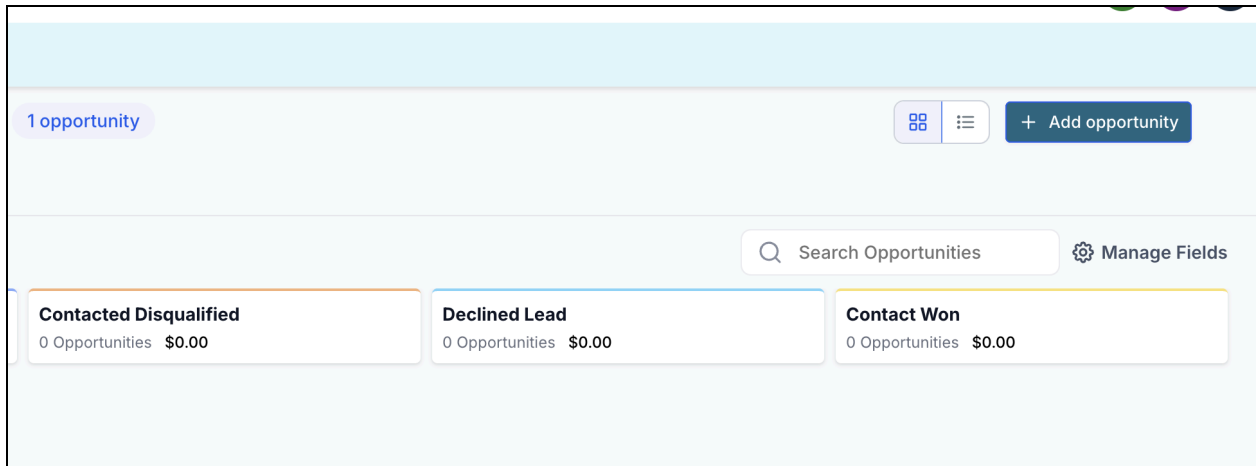
- Use when you successfully close the sale

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

Arizona 1 opportunity

All + List

Advanced Filters Sort (1)

To Be Contacted	Contacted	Contacted Scheduled
1 Opportunities \$0.00	0 Opportunities \$0.00	0 Opportunities \$0.00

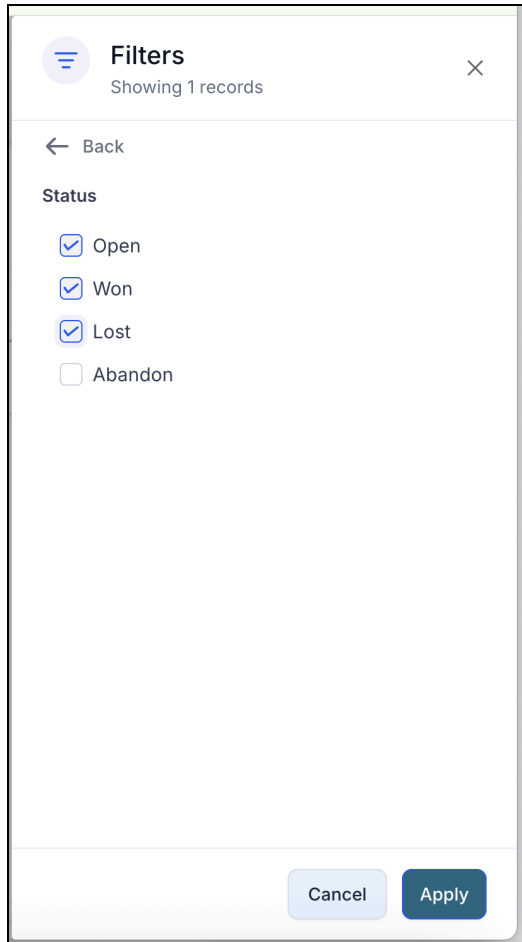
Filters Showing 1 records

Clear all filters AND OR

Status: is Open

+ AND





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

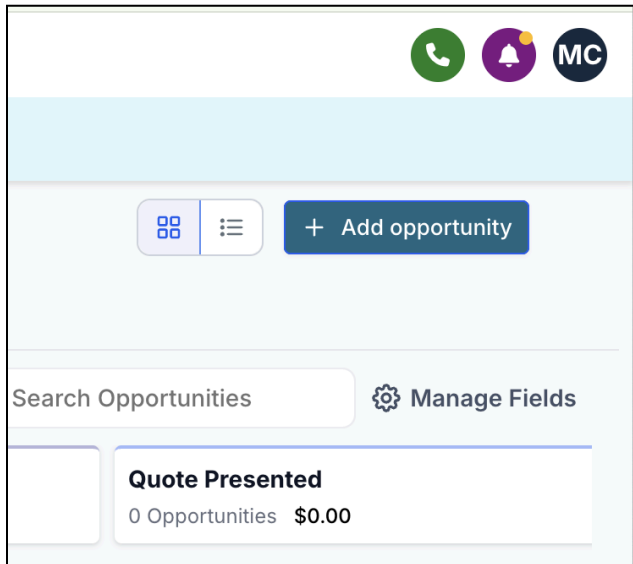
- Displays leads in a table format
- Same information, different layout

To switch views:

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

You can still:

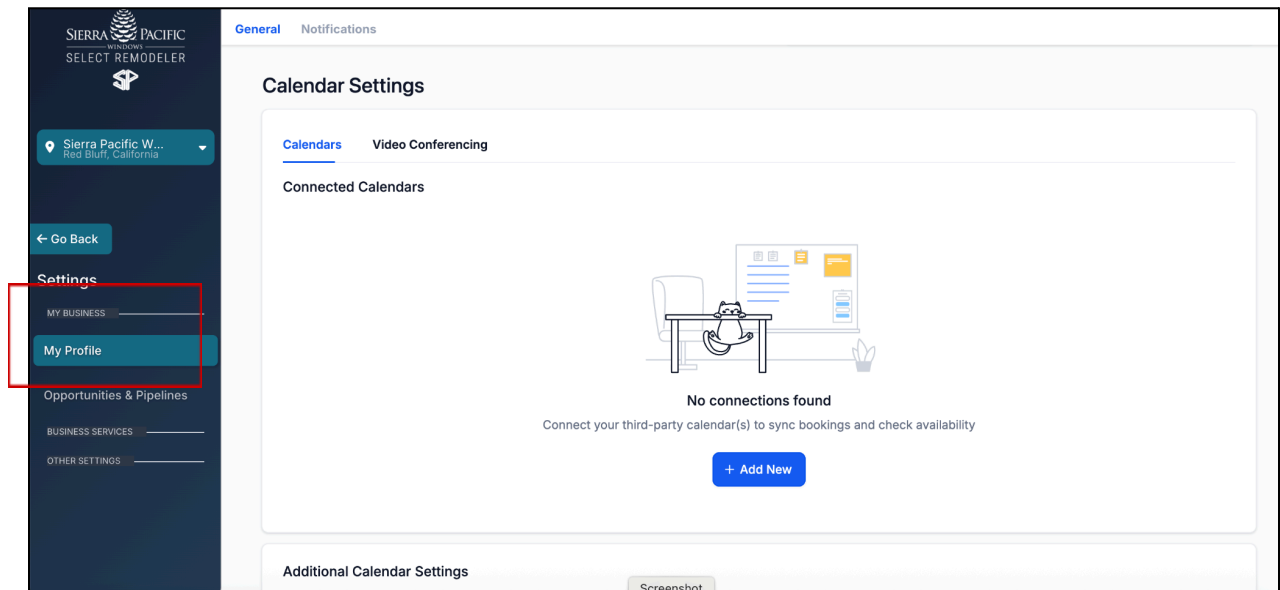
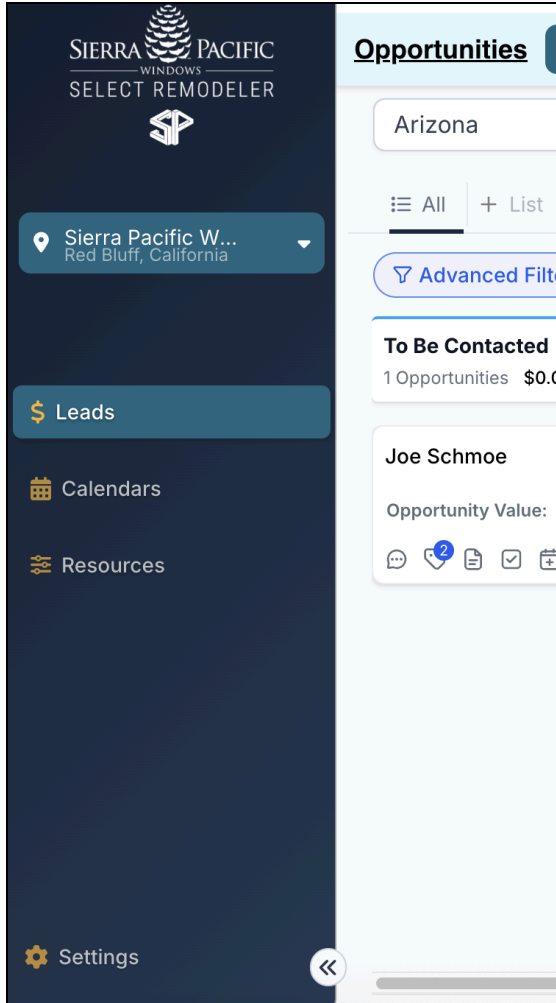
- Open lead details
- Edit stages
- Update information in either view



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

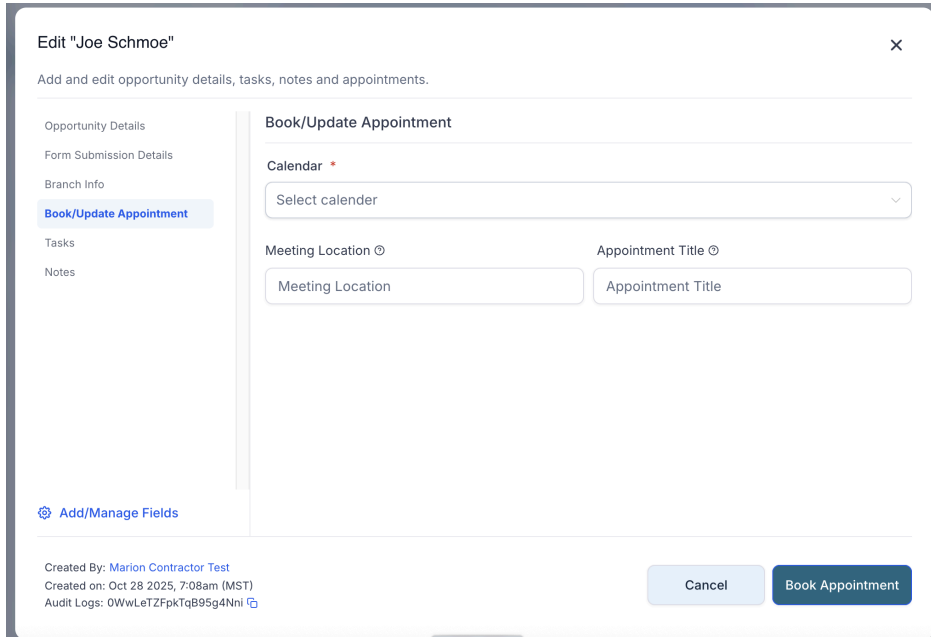


Book an Appointment from a Lead

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



The screenshot shows a web interface for editing an appointment for a lead named "Joe Schmoe". The interface is titled "Edit 'Joe Schmoe'" and includes a close button (X) in the top right corner. Below the title, there is a subtitle: "Add and edit opportunity details, tasks, notes and appointments." A left-hand navigation menu lists several sections: "Opportunity Details", "Form Submission Details", "Branch Info", "Book/Update Appointment" (which is highlighted in blue), "Tasks", and "Notes". The main content area is titled "Book/Update Appointment" and contains the following fields: a "Calendar" dropdown menu with a red asterisk and the text "Select calendar"; a "Meeting Location" input field with a circled 'i' icon; an "Appointment Title" input field with a circled 'i' icon; and a "Meeting Location" input field with a circled 'i' icon. At the bottom left of the form, there is a link "Add/Manage Fields" with a gear icon. At the bottom right, there are two buttons: "Cancel" and "Book Appointment". At the bottom left of the form, there is a footer section with the following text: "Created By: Marion Contractor Test", "Created on: Oct 28 2025, 7:08am (MST)", and "Audit Logs: 0WwLeTZFpkTqB9Sg4Nnl".

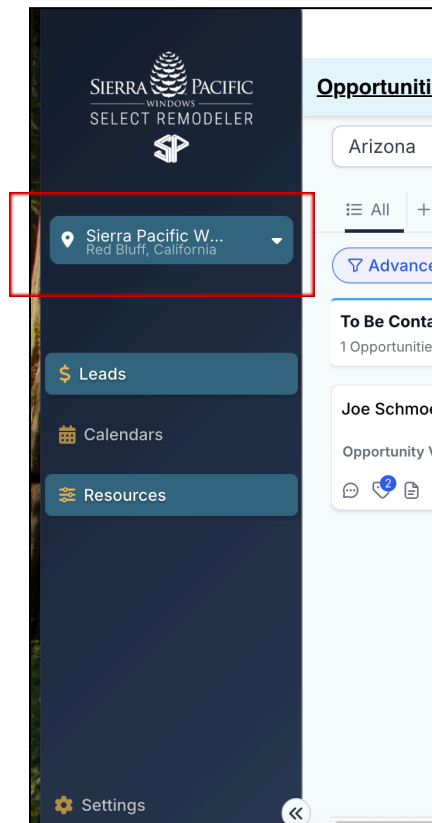
Step 11: Access Resources

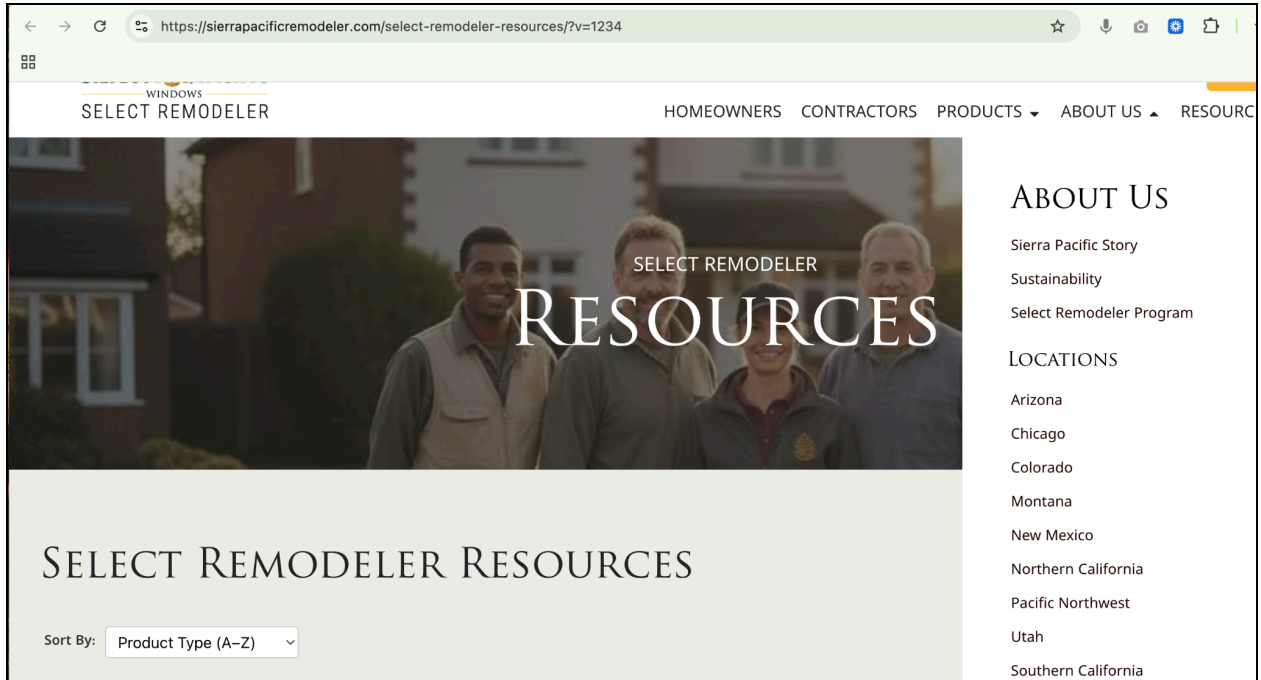
1. Click **Resources** in the left-hand menu
2. You'll be taken to an external resource page containing:
 - Installation guides
 - Architectural design manuals
 - Brochures
 - Spec sheets

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