Select Remodeler CRM – Managing Leads via Text & Email Notifications

This final section covers how you can interact with the CRM **without logging in**, using text message and email notifications to stay on top of leads.

Step 1: Understand How the CRM Communicates With You

When your CRM account is set up, it is connected to:

- Your **email address**
- Your **phone number**

This allows the CRM to:

- Notify you when a new lead is assigned
- Send reminders if a lead hasn't moved
- Let you update lead stages **by text message**

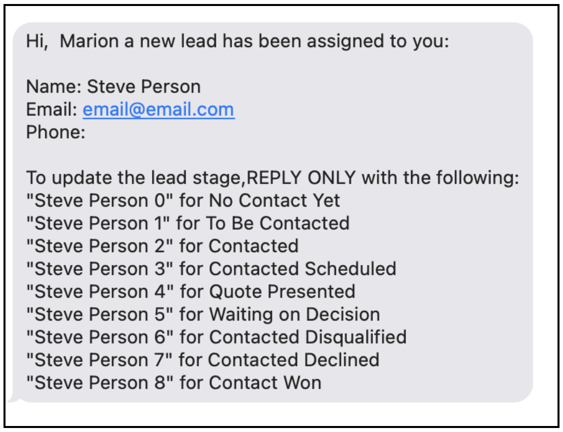
Step 2: Receive a New Lead Notification

When a lead is assigned to you:

- You'll receive a **text message**
- You'll also receive an **email notification**

The text message will confirm:

- A new lead has been assigned
- The homeowner's name
- Instructions for responding by text



Step 3: Update a Lead Stage by Text Message

You can move a lead through stages **by replying directly to the text message** — no login required.

How It Works

1. Reply to the CRM text message
2. Type the **customer's name exactly as shown**
3. Add the **stage number** you want to move the lead to

Example:

- Customer name: `StevePerson`
- Reply: `StevePerson 4`
- Result: The lead moves to **Quote Presented**

Once the text is received:

- The CRM automatically updates the lead stage

Step 4: Use Text Updates for Any Lead Stage

This text-based update works for:

- Contacted
- Quote Presented
- Waiting on Decision

- Won
- Declined
- Disqualified

As long as:

- The customer name is typed correctly
- The correct stage number is used

Step 5: Receive Follow-Up Prompts via Text

The CRM will also send **helpful reminder texts** based on lead activity.

Examples:

- When a lead is marked **Won**, you'll receive a prompt reminding you to:
    - Enter the **estimated product value**
- This helps you and your Territory Manager understand pipeline value

You can add the value the next time you log into the CRM.

Step 6: Declining a Lead via Text (Important)

If you move a lead to **Declined** or **Disqualified** by text:

- The CRM will send you a reminder text
- You'll be prompted to enter a **reason for declining**

What to Do:

1. Log into the CRM
2. Open the lead
3. Enter the reason in the **open text field**
4. Click **Update**

This ensures your Territory Manager understands why the lead was not pursued.

Step 7: Understand Automated Reminder Notifications

The CRM also sends **automatic text and email reminders** when leads sit too long in certain stages:

Notification Timing

- **To Be Contacted**
  - Reminder sent after **24 hours**
- **All other active stages**
  - Reminder sent after **1 week**
- **Quote Presented**
  - ❌ No reminders sent
  - This stage allows time for customer decision-making

Step 8: Use Notifications as Support (Not Pressure)

The notification system is designed to:

- Help you stay responsive
- Prevent leads from slipping through the cracks
- Support healthy follow-up habits

Quote Presented is intentionally excluded from reminders to respect longer decision timelines.

Step 9: Know Where to Get Help

If you have questions about:

- Notifications
- Lead movement
- CRM setup

Reach out to your **local Territory Manager** — they're your first line of support.