**Custom Training & Professional Consulting – Build your Agenda**

**Improveit 360 Enterprise**

**Prospects, Lead Sources and Marketing Opportunities**

**Suggested Attendees:** Lead Entry, Marketing Manager, Office Manager and Schedulers

**Lead Entry – Creating New Prospects**

* Search and Create – weighting
* ‘Create New’ for existing Prospects creates a new Lead Source
* Open Items
* Creating New Prospects, Prospect & Appointment
* Adding Fields to Lead Entry page ‘+ more details’ sections
* Assigning the Marketing Opportunity and setting a due date
* Source and Source Type – choosing the correct Source
* New Prospect Screen
* Prospect Information and Fields
* Related Lists
* Prospects Tab – List Views
* Sending emails 25 at a time
* Marketing Restrictions – flagging Prospects, setting Not Qualified Reasons
* Merge Prospects Tab – Merging and Deleting Prospects

**Marketing Opportunities**

* Working Marketing Opps
* Home page Tiles – My Opps – when to Assign Opportunities
* Marketing Opportunities Page
* Create New – Marketing Opps
* Assigning
* Type and Type Detail – when to use custom Type or Type Detail
* Due Date
* Comments
* Do Not manually complete Marketing Opportunities
* Marketing Opportunities Tab – List Views
* Settings > Marketing Opportunity Delay

**Call Campaigns**

* Campaign Settings
* Recall Durations
* Auto-Release Call Limit and Age Limit
* Campaign Filter Criteria / Build Campaign Structure
* Sort Order

**Call Queue – Working Marketing Opps using Call Dispositions**

* Dispositions
	+ Prompt a Recall
		- No Answer
		- Left Message
		- Busy Signal
		- Return Call Later
	+ Completed
		- New Appointment
		- Remarket
		- Not Qualified
		- Wrong Number

**Appointments**

**Suggested Attendees:** Office Manager, Scheduling Manager, Schedulers & Confirmers

**Scheduling Appointments**

* Prospect – Create New Appointment
* Search and Create – Prospect and Appointment
* Marketing Opportunities –Create New Appointment
* Types – New vs Rehash vs Reset
* Comments – sent to Sales Rep[s] assigned
* Appointment Address
* Setting the Date and Time
* Scheduling Calendar
* Find Available Time
* Staff Calendar
* Interests – Product Categories
* Automated Emails
* Appointment Confirmation to Prospect
* Appointment Cancelation to Prospect
* Appointment Notification to Rep[s]

**Assigning Appointments**

* Selecting a Sales Rep[s]
* Automated emails to Reps
* Scheduling Calendar
* Find Available Time
* Staff Calendar
* Staff Colors
* Unassigned
* ***Set On*** and ***Set By***
* Appointment Views
* Home Page Tiles

**Confirming Appointments**

* ***Confirmed On*** and ***Confirmed By***
* Appointment Views
* Home Page Tiles

**Canceling Appointments**

* Resulting Appointments as ***Canceled***
* Automated Cancel emails to Prospects
* Creating a Reset Marketing Opportunity or Appointment

**Rescheduling Appointments**

* Do I result the appointment as ***Canceled***?
* Changing the date and time?
* Automated emails to Sales Reps
* Automated emails to Prospects

**Time Blocks and Appointment Manager**

* Additional Scheduling Tools
* Assign a Time Block rather than a Rep
* Use Appointment Manager
* Assign Reps using Tool

**Reviewing your Appointments**

* Appointment Views
* Creating custom List Views
* Home Page Tiles
* The Staff Calendar
* Views – Day, Week, Month, by Staff
* Staff Filters
* Type, Product Category and Market Segment Filters
* Scheduling Calendar
* Print
* Email

**Resulting Appointments**

**Suggested Attendees:** Office Manager, Sales Manager and Sales Reps

**Appointment Results**

* [Result Definitions](https://support.improveit360.com/hc/en-us/articles/360052614793-Appointment-Result-Reporting-Count-Fields-). Why can’t I change them?
* Result Details – how to leverage custom Details
* How are these results represented in reports?
* Issue, Demoed, Sold “count” fields
* Disregard in Statistics - What does this mean?
* Why is the box defaulted when selecting ***Follow-Up***?
	+ Is your process a Two-step close?
* Price Quoted
* Taking Next Steps
* Creating a new Appointment
* What is the Appointment Type field used for?
* Automated confirmation email?
* Resulting Appointments as *Canceled*
* Automated Cancel Emails to Prospects
* Creating a ‘Reset’ Marketing Opportunity or Appointment
* Demoed, Not Sold - Creating a ‘Rehash’ Marketing Opportunity
* Assigned To – who works this Opportunity?
* Assigned Marketing Opportunities - do not fall into the Call Queue
* Due Date
* Comments
* New Lead Source won’t close Opportunity.
* Flagging the Prospect
* Not Qualified Reason[s]
* How do I stay on top of my appointments that need resulted?
* Appointment Views
* Home Page Tiles
* Un-Resulting Appointments – if Result is Sold, deletes Sale, Project, and all related records
* When is it appropriate to use Un-Result?
* Best Practices & Sales Reps accountability for Resulting

**Quotes**

**Suggested Attendees:** Office Manager, Sales Manager and Sales Reps

**Creating Quotes**

* Adding Quote Items
* Selecting Products and Product Categories
* Generating Quote PDF’s
* Using the Quote with Signature
* Sending Emails
* Cloning Quotes

**Quote Templates**

* Saving Quotes as Templates
* Products and Product Configurator
* **Add-On consideration**\*: Products & Materials
* Creating new Quote Templates

**Importing Quotes**

* Importing Quotes into Appointments/Sales

**Reviewing Your Quotes**

* Quote Views

**Sales**

**Suggested Attendees:** CFO, Office Manager, Sales Manager and Sales Reps, Accounting

**Creating Sales**

* Resulting Appointments as Sold
* Sold Price vs. Price Quoted
* Importing Quotes
* Payment Types
* Using a Lender

**Tracking Sales**

* Sale Statuses
* Sold On
* Net On
* Paid In Full – automated email
* Final - automated email
* Status Details
* Sale Items
* Products and Product Categories
* Change Orders
* Tax
* Edit Sold Price Checkbox
* Completing Sales
* Setting a ***Final On*** date
* Auto-Creation Marketing Opportunity and Closed Loop Marketing – 180 Days after ***Final On*** date

**Reviewing your Sales**

* Sales Tab - Views
* Homepage Tiles
* Sale Name
* The Prospect is now a customer!

**Receipts and Adjustments**

* Adjustments vs. Deposits
* QuickBooks
* How does this information get integrated?
* Generating a Sales invoice PDF

**PaySimple Real-time Payment processing**

* Review Integration
* Referral to PaySimple team

**Commissions and Commission Rules**

* Base Commission Earned vs Base with Rep Split
* Flat Percentage Rule vs Over/Under
* Applying Commission Rule to a Sale
* 50% at Net / 50% at Final

**Staff Account Transactions**

* Transfer Commission to Account Balance
* Debit from Staff Account when they get paid
* Add Credits like Bonuses

**Lenders, Loans and Loan Programs**

* Loan Programs / Templates
* Lenders = Accounts w/ Type of Lender
* Loan records are created from the Sale page

**Projects**

**Suggested Attendees:** Office Manager, Project Manager, Warehouse Manager and Install Chiefs

**Creating Projects**

* Creating a new Project from a Sale
* Installation Crews and Project Managers
* What do I use these fields for?
* Product Categories
* Project Statuses
* Completing Projects
* LSWP/RRP Compliance
* Project Start Date & Project Completed Date

**Scheduling Project Appointments and Tasks - Project Activities**

* Types – Appointment vs. Tasks
* Start & End Dates vs Reminder & Due Dates
* Completed Dates
* Automated Emails
* 14 Day limit
* Assigning
* Using the calendar
* Project Templates
* Creating new Templates
* Days until next
* Generating Work Order PDF’s

**Tracking Project Costs**

* Creating new Project Cost from a Project
* Project Cost Totals and Profit

**Purchase Orders**

* Creating new Purchase Orders
* Importing Sale Items
* Creating ad hoc Purchase Order Items
* Bill To and Ship To Addresses
* Received Date
* Automated Project Cost
* Generating Purchase Order PDF’s

**Service and Warranty**

* How can I use Projects to track Service and Warranty work?
* Opening multiple Projects for one Sale
* Tracking separate product installations

**How do I track my Projects and Project Activities?**

* Project Tab – Views
* Project Activities Tab - Views
* Homepage Tiles and Task Views
* Project Name

***Add-On Package option* – Products and Materials**

* Allocated Materials Qty on every Product sold
* Foreman marks Installed Qty
* Compare Estimates with Actual Costs
* Auto-Creation of Project Cost records for Installed Materials

**System Administration Training**

**Suggested Attendees:** Operations Manager, Office Manager

**Settings**

* Sources
* Adding new Sources
* Ending Sources
* Source Costs
* Product Categories - Adding and Removing
* Emails & ics Calendar Invitation
* Organization Wide Email Address
* Verification Email
* Company Website
* Template Assignments
* Advanced
* Market Segments
* Drag and Drop Staff Calendar
* Appointment Conflicts
* Image Carousel options
* Marketing Opportunity Delay
* Existing Database Source Name
* Other Tasks
* System Integrity Check
* Mobile
	+ Set which User Profiles can View All Calendars
* Search Nearby

**Configuration**

* Create Public Groups
* Create List Views for specific Group of Users
* Edit Picklist Values (Deactivate unused Results)
* Create Custom Fields / Add to Field Set
* Configure Mini-Page Layout
* Add Fields to Related Lists
* Add Fields to Lookup Dialog window

**Users and Staff**

* Adding new Users
* Deactivating Users
* Profiles and Permission Sets
	+ Out-of-the-box Profiles
	+ Creating custom Profiles
* Add New Staff *then* Activate User
* Calendar Color
* Capabilities
* Email Address
* Linking Active Staff to Active Users
* Ending Staff Members
* Merging duplicate Staff
* End Dates

**Email Templates**

* What is offered out of the box?
* Customizing Existing Templates
* Creating Email Templates from scratch
* Methods of sending emails
* Workflows
* Print/Email
* 25 at a time – List View
* My Documents
* Template Images
* Company Logo

**Reports & Dashboards**

**Suggested Attendees:** Operations Manager, Office Manager, Sales Manager and Marketing Manager

**Reports**

* Out of the box reports
	+ Lead Source Performance
	+ Source cost Performance
	+ Appointment Performance
	+ Sales by Month by Rep
	+ Active Projects
* Date Ranges and Summaries
* Creating custom reports
* Understanding Report Types
* Adding fields to Report Types
* Date Ranges – relative date filters
* Show Details
* Field Filters and Filter Logic
* Formulas
* Report Formats
	+ Tabular
	+ Summary
	+ Matrix
	+ Joined
* Exporting Reports
* Scheduling future runs

**Dashboards**

**Dashboards**

* Out of the Box Dashboards
* Editing Existing Dashboards
	+ Components
	+ Data Sources
	+ Component Data and Formatting
* Dashboard Folder Security
* Run as logged in user
* Run as specific user
* Creating new Dashboards from scratch
* Add Dashboard Snapshot to Home page layouts
* Schedule future runs

**improveit 360 Go – Mobile App**

**Suggested Attendees:** Operations Manager, Office Manager, Production Manager, Sales Manager, Sales Reps and Install Chiefs

**Mobile App**

* Home Page and Sidebar Menu
* Searching for Prospects and Entering New Prospects
* Viewing All Attachments for a Prospect
* Scheduling an Appointment with a Prospect
* Viewing the Calendar
* Viewing “My Appointments”
* Can Users look at other’s Calendars?
* Creating a Quote
* Capturing an Electronic Signature on Quotes
* Resulting Appointments
* Uploading Photos
* How to Edit (from the Details page)
* How to find Related items (Related page)
* Sold! Adding Payments (Receipts & Adjustments)
* PaySimple real-time payment processing
* Using Search Nearby feature
* Viewing “My Tasks”
* Viewing “My Project Activities”
* Completing Project Activities
* Add new Project Activities
* Preferences
	+ Version
* Troubleshooting – Pending Actions