PERQ | CRM

HOW TO's

HOW TO:

COLORED STAGES AND FLAGS

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Leads in the Blue stage are:

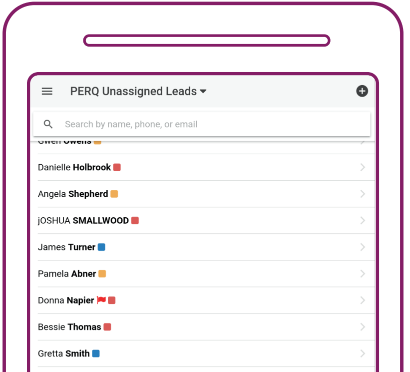
- Higher in the purchase funnel
  - Not ready to talk just yet
- What should I do?
  - Allow Automated Email Nurture System to follow-up & convert into a “better” lead for you to follow up with.

Leads in the Yellow stage are:

- Expressing buying signals
  - Complete multiple experiences, timeline to purchase is soon, etc.
  - Did not ask a question on the website
- What should I do?
  - Allow Automated Email Nurture System to follow-up & engage with a human touch
  - Try to get a question asked so it can move into the next phase of the buying cycle

Leads in the Red stage are:

- Low in the purchase funnel
  - Asked a question via website or follow-up on “Yellow Lead” process
  - Ready for human touch and fast follow up is key to revenue conversion
- What should I do?
  - Follow your store’s process for handling “Digital ups”



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HOW TO:

CLOSE AN ACTIVE DEAL

PERQ | CRM

START Find and open the contact

Steps:

1. Click on the deals tab
2. Click on the 3-dot menu next to the deal
   Select “Edit”
3. Change the status to reflect the sale
   Active, Won, or Lost
4. Update the stage, if necessary
   Pre-lead, Active Lead, Hot Lead, or Won/Lost
5. Tag the type of merchandise the customer is looking for
6. Project the sale amount
7. Slide the purple dot to indicate the customer’s probability to purchase
8. Add any additional notes
9. Set a projected close date END

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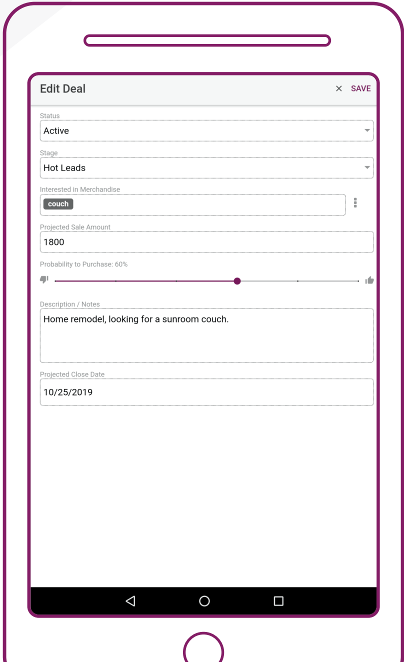


HOW TO:

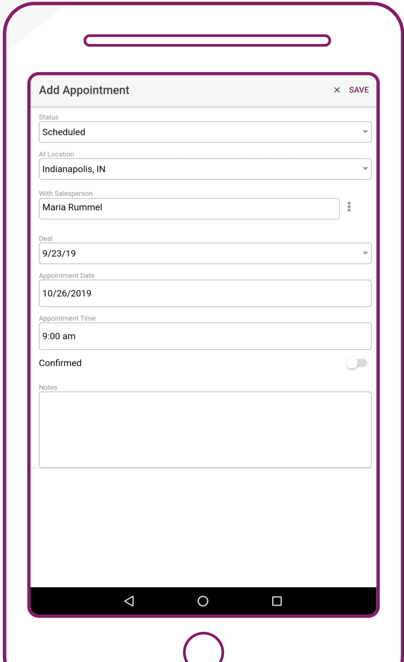
USE THE APPOINTMENTS TAB

PERQ | CRM

Contact with logged appointments in PERQ CRM will receive a reminder 2 days before their appointment.

Steps:

1. Open the contact record
2. Click on the appointments tab
3. Check for any existing appointments
4. If not appointments have been scheduled, click “+ Add”
5. Select a Status*, Location, Salesperson, and Deal.
6. Fill in the date and time of the appointment
7. Add notes
8. Hit Save from the upper right corner END



*After the contact, confirms, shows, no-shows, or cancels, return to this screen and update the appointment status.

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HOW TO:

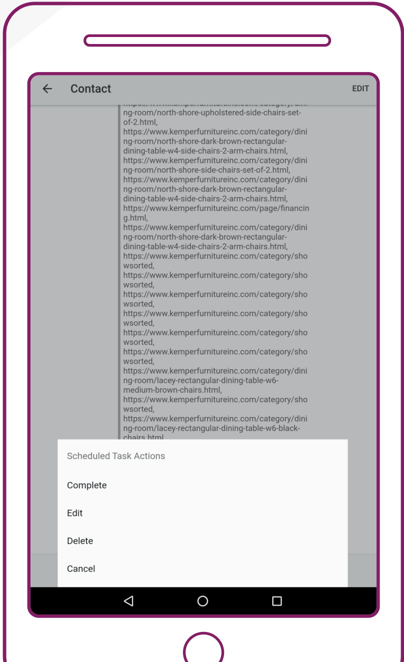
CLOSE A TASK

PERQ | CRM

START Find and open the contact.

Steps:

1. Select “Tasks” from the tabs at the bottom of the screen.
2. Scroll to find the task
3. Click on the 3 dot-menu, just right of the task.
4. Click complete END



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HOW TO:

LOG PHONE CALLS

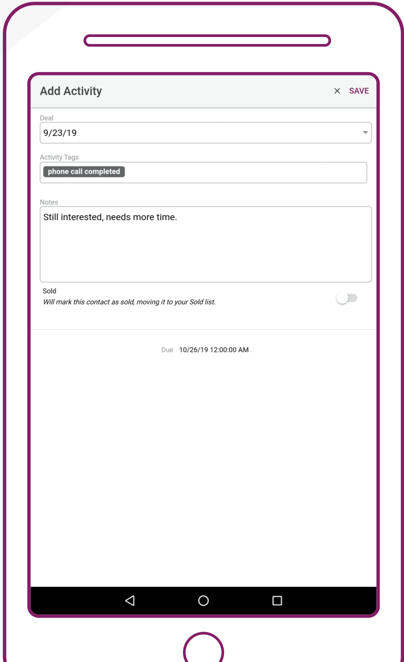
PERQ | CRM

With PERQ CRM, you can log and keep track of activities that take place outside of the CRM.

Steps:

1. Click on the history tab
2. Next to "Show Logs" click on "+ Add"
3. Select the deal for the activity

   Find the details of each deal under the "Deals" tab
4. Add tags for the type of activity and status, such as "phone call completed"
5. Add any notes from the follow-up
6. If this activity resulted in a sale, turn the Sold toggle on
7. Hit "Save" from the upper right corner END



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HOW TO:

TEXT A LEAD USING A TEMPLATE

PERQ | CRM

START Find and open the contact.

Steps:

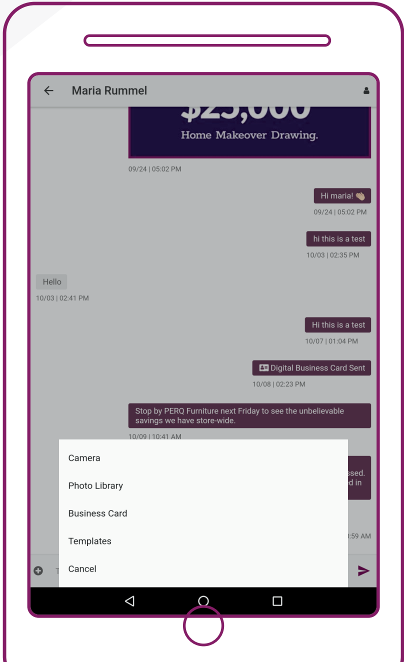
1. Click the texting icon under the contact name

   The message history will open

2. Click on the "+" icon next to the text field
3. Select "Templates"
4. Pick a template

   The text will populate the text message field

5. Add any necessary customizations
6. Proofread the text
7. Hit the send icon from the right side of the text field **END**



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HOW TO:

SEND AN EMAIL USING A TEMPLATE

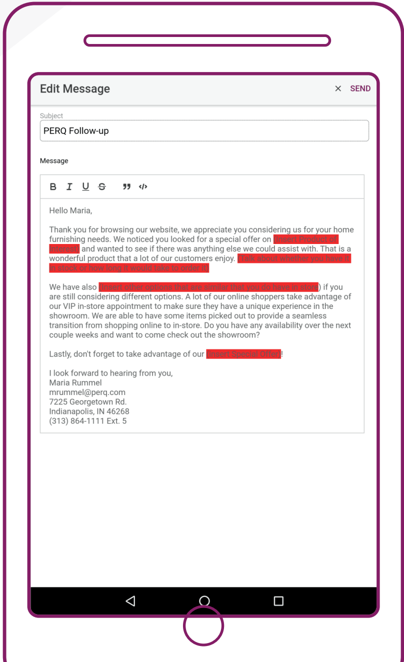
PERQ | CRM

START Find and open the contact.

Steps:

1. Click the email icon under the contact name
2 Select the template
3. Customize your email

   TIP: Ensure that you've replaced all instructional text, such as "insert product name here"
4. Proofread the email
5. Hit send from the upper right hand corner END



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HOW TO:

CREATE A NEW PENDING TASK

PERQ | CRM

START Navigate to the menu on the left side of the screen, then select "Contacts"

Steps:

1. Select "Tasks" from the tabs at the bottom of the screen.

   See any pending tasks already listed

2 Click the "+ ADD" Button

3.Select a Deal for the Activity

   Most contacts will only have 1 deal. If multiple are listed, visit the Deals section to identify the date of the deal you're following up on.

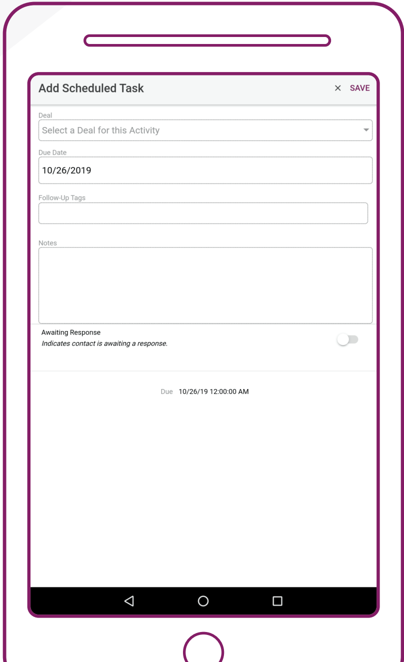
4. Select a Due Date

5. Add tags

   How will you follow-up?

6. Add any notes

7. If the customer is awaiting a response, switch the toggle on.



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HOW TO:

FIND A CONTACT'S WEBSITE HISTORY

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Website History is available in 2 places in the CRM. The PERQ Tab, and the History tab. Start by opening the contact record.

For the most recent data:

Click on the PERQ tab

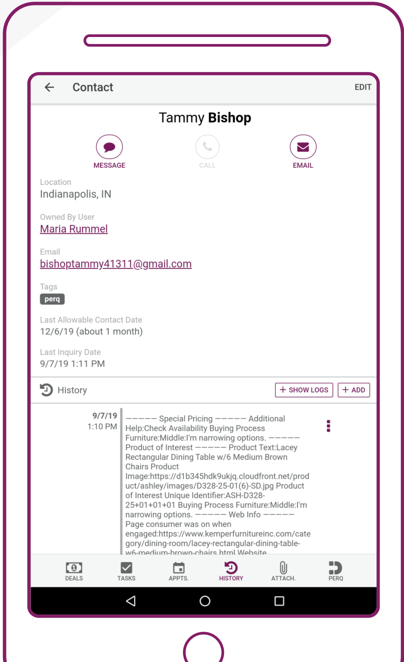
Read for experience info, the most recent product of interest, and any questions the customer has asked.

To see previous web engagement:

Click on the History tab

Click "+ Hide Logs"

Scroll to see engagement information as well as any previous follow-up activity



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HOW TO:

RE-ASSIGN A CONTACT

PERQ | CRM

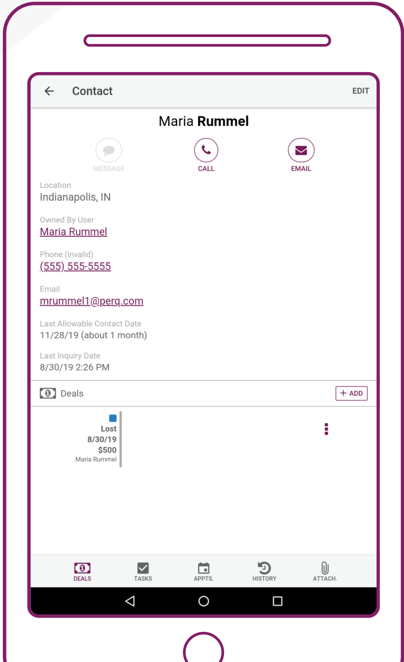
START Open the record for the contact you'd like to re-assign.

Steps:

1. Look at the location listed on the contact record
2. Click on the name of the current owner under "Owned by User"

   A "Reassign Contact" box will open, showing your locations
3. Select the location that was listed on the contact
4. Select the salesperson
5. Select the reason for re-assigning the contact
6. Add notes
7. Click "Reassign"

   Your contact has now been re-assigned END



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HOW TO:

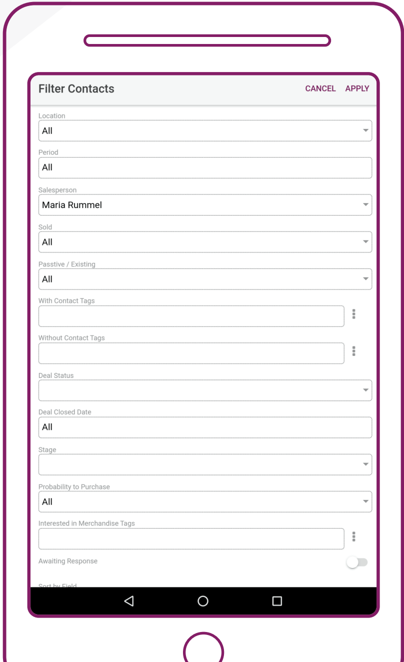
SORT & FILTER MY CONTACT LIST

PERQ | CRM

START Navigate to the menu on the left side of the screen. Click on “Contacts”

Steps:

1. Click on the drop down from the top of the screen
2. Click “Filter Criteria...”
3. Fill in the criteria of the leads you want to see, such as: Location, Sales Person, Tags, Deal Status, Probability to Purchase, etc.
4. Select how you want to sort the contacts and the direction. For example: Date Entered and Descending will show the newest contacts on top
5. Hit Save END



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HOW TO:

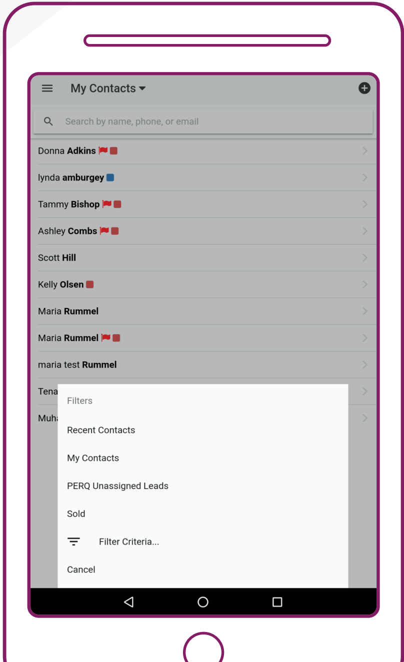
FIND A CONTACT

PERQ | CRM

START navigate to the menu on the left side of the screen.

Steps:

1. Select “Contacts”
2. Click on the drop down at the top of your screen to use a filter.
3. OR search directly for the contact by entering their name, phone, or email into the search box. END



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HOW TO:

ASSIGN A CONTACT

PERQ | CRM

START Navigate to the menu on the left side of the screen, then select "Contacts"

Steps:

1. Select the filter at the top of the screen

   Menu will open
2. Select "PERQ Unassigned Leads"

   These are your unassigned PERQ leads

   Use the search box to find a specific contact
3. Click on the lead you want to assign

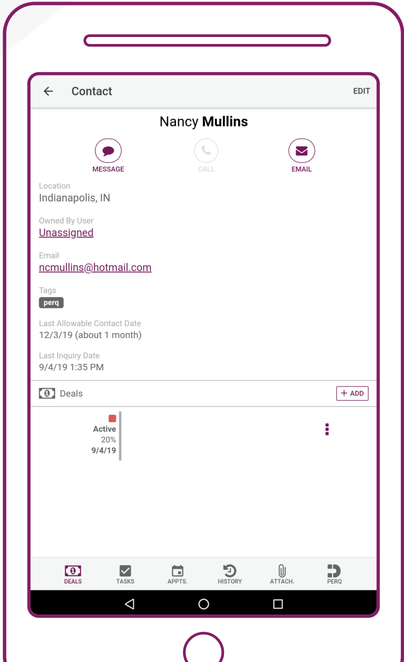
   The contact details page will open

   Look at the contact's listed location
4. Under "Owned by User" click "Unassigned"

   A **Reassign Contact** box will open, showing your locations

   Click the location that was listed on the contact
5. Select the salesperson

   Your contact has been assigned END



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