PERQ CRM HOW TO's

HOW TO: COLORED STAGES AND FLAGS



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

PERQ|CRM

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"

\equiv PERQ Unassigned Leads $ imes$	0
Q Search by name, phone, or email	
GMCH CHERS -	
Danielle Holbrook	
Angela Shepherd 📒	
JOSHUA SMALLWOOD	
James Turner 📕	
Pamela Abner 📒	
Donna Napier 🎮 📕	

HOW TO: CLOSE AN ACTIVE DEAL







Steps:

- 1. Click on the deals tab
- 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





Edit Deal			× SAV
Active			
Stage			
Hot Leads			
Interested in Mercha	ndise		:
Projected Sale Amou			
1800			
Probability to Purcha		•	
Probability to Purcha Probability to Purcha Description / Notes Home remodel	e: 60%	e couch.	
Probability to Purcha		•	

HOW TO: USE THE APPOINTMENTS TAB



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

PERQ CRM

8. Hit Save from the upper right corner



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

Add Appointment V CAM Scheduled Indianapolis, IN Maria Rummel 9/23/19 10/26/2019 9.00 am Confirmed ⊲ 0

HOW TO: CLOSE A TASK





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



← Contact		EDIT
	ne process most the down applications and adds e shafts sete of 2 html, https://www.kemigerfurniturence.com/category/dm https://www.kemigerfurniturence.com/category/dm https://www.kemigerfurniturence.com/category/dm https://www.kemigerfurniturence.com/category/dm https://www.kemigerfurniturence.com/category/dm https://www.kemigerfurniturence.com/category/dm https://www.kemigerfurniturence.com/category/dm https://www.kemigerfurniturence.com/category/dm https://www.kemigerfurniturence.com/category/dm https://www.kemigerfurniturence.com/category/dm https://www.kemigerfurniturence.com/category/dm weated, https://www.kemigerfurniturence.com/category/dm weated, https://www.kemigerfurniturence.com/category/dm weated, https://www.kemigerfurniturence.com/category/dm weated, https://www.kemigerfurniturence.com/category/dm weated, https://www.kemigerfurniturence.com/category/dm weated, https://www.kemigerfurniturence.com/category/dm weated, https://www.kemigerfurniturence.com/category/dm weated, https://www.kemigerfurniturence.com/category/dm weated, https://www.kemigerfurniturence.com/category/dm weated, https://www.kemigerfurniturence.com/category/dm weated, https://www.kemigerfurniturence.com/category/dm weated, https://www.kemigerfurniturence.com/category/dm weated, https://www.kemigerfurniturence.com/category/dm weated, https://www.kemigerfurniturence.com/category/dm kewided, https://www.kemigerfurniturence.com/category/dm kewided, https://www.kemigerfurniturence.com/category/dm kewided, https://www.kemigerfurniturence.com/category/dm kewided, https://www.kemigerfurniturence.com/category/dm kewided, https://www.kemigerfurniturence.com/category/dm kewided, https://www.kemigerfurniturence.com/category/dm kewided, https://www.kemigerfurniturence.com/category/dm kewided, https://www.kemigerfurniturence.com/category/dm kewided, https://www.kemigerfurniturence.com/category/dm kewided, https://www.kemigerfurniturence.com/category/dm kewided, https://www.kemigerfu	
Scheduled 1		
Complete		

	Complete				
	Edit				
	Delete				
	Cancel				
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HOW TO: LOG PHONE CALLS



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



Add Activity	× s/
Deal	
9/23/19	
Activity Tags phone call completed	
prone can completed	
Notes	
Still interested, needs more time.	
Sold	
Will mark this contact as sold, moving it to your Sold list.	0
Due 10/26/19 12:00:00 AM	



HOW TO: TEXT A LEAD USING A TEMPLATE





Steps:

- 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





HOW TO: SEND AN EMAIL USING A TEMPLATE





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



Edit M	lessage		×
Subject			
PERQ	Follow-up		
Message			
в	t⊻ e	55 ()>	
Hello	Maria,		
are s our \ show trans coup Last	ill considerin IP in-store aj room. We ar ition from sh ie weeks and , don't forge	ing different options. A lot of our online opointment to make sure they have a i e able to have some items picked out opping online to instore. Do you have I want to come check out the showrout to take advantage of our	e shoppers take advantage o unique experience in the to provide a seamless e any availability over the nex am?
Mari mrur 7225	forward to h Rummel mel@perq.c Georgetown tapolis, IN 4	Rd.	

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HOW TO: CREATE A NEW PENDING TASK



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

PERQ CRM

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

Add Scheduled Task × SAVE 10/26/2019 Awaiting Response Indicates contact is awaiting a response Due 10/26/19 12:00:00 AM ⊲ 0

HOW TO: FIND A CONTACT'S WEBSITE HISTORY



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



HOW TO: RE-ASSIGN A CONTACT



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



← Contact					EI
	Maria	Rumm	el		
MESSAGE		CALL		EMAIL	
Location Indianapolis, IN					
Owned By User Maria Rummel					
Phone (invalid) (555) 555-5555					
Email mrummel1@perq.com					
Last Allowable Contact Date 11/28/19 (about 1 month)					
Last Inquiry Date 8/30/19 2:26 PM					
0 Deals					+ AD
Lost 8/30/19 \$500 Mario Rummel				:	
DEALS TASKS		APPTS.	HISTORY	ATTAI	 сн.
4		0			

HOW TO: SORT & FILTER MY CONTACT LIST



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..."
- Fill in the criteria of the leads you want to see, such as: Location, Sales Person, Tags, Deal Status, Probability to Purchase, etc.
- 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

Filter Contacts	CANCEL APPL
Location	
All	
Period	
All	
Salesperson	
Maria Rummel	
Sold	
All	
Passtive / Existing	
All	
With Contact Tags	
	1
Without Contact Tags	
	1
Deal Status	
Deal Closed Date	
All	
Stage	
Probability to Purchase	
All	
Interested in Merchandise Tags	
	:
Awaiting Response	

HOW TO: FIND A CONTACT



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



≡	My Contacts 👻	
۹	Search by name, phone, or email	
Donna	a Adkins 🎮 🛢	
lynda	amburgey 🔳	
Tamm	iy Bishop 🎮 📕	
Ashle	y Combs 🍽 🛢	
Scott	Hill	
Kelly	Disen 📕	
Maria	Rummel	
Maria	Rummel 🎮 🛢	
maria	test Rummel	
Tena	Filters	
Muh	Recent Contacts	- 1
	My Contacts	- 1
	PERQ Unassigned Leads	- 1
	Sold	- 1
	Filter Criteria	- 1
	Cancel	- 1

HOW TO: ASSIGN A CONTACT



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 "PERO 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

PERQ CRM

Your contact has been assigned



← Contact			E
N	ancy Mullins		
MESSAGE Location		EMAIL	
Indianapolis, IN			
Owned By User Unassigned			
Email ncmullins@hotmail.com			
Tags			
perq			
Last Allowable Contact Date 12/3/19 (about 1 month)			
Last Inquiry Date 9/4/19 1:35 PM			
Deals			+ AI
Active 20% 9/4/19			:
DEALS TARKS A		Ω.	
	PPTS. HISTORY	ATTACH.	PERQ