SIMPLIFYING THE SALES PROCESS

RFMS Webinar Series 2019

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SIMPLIFYING THE SALES PROCESS

RFMS SALES TOOLS

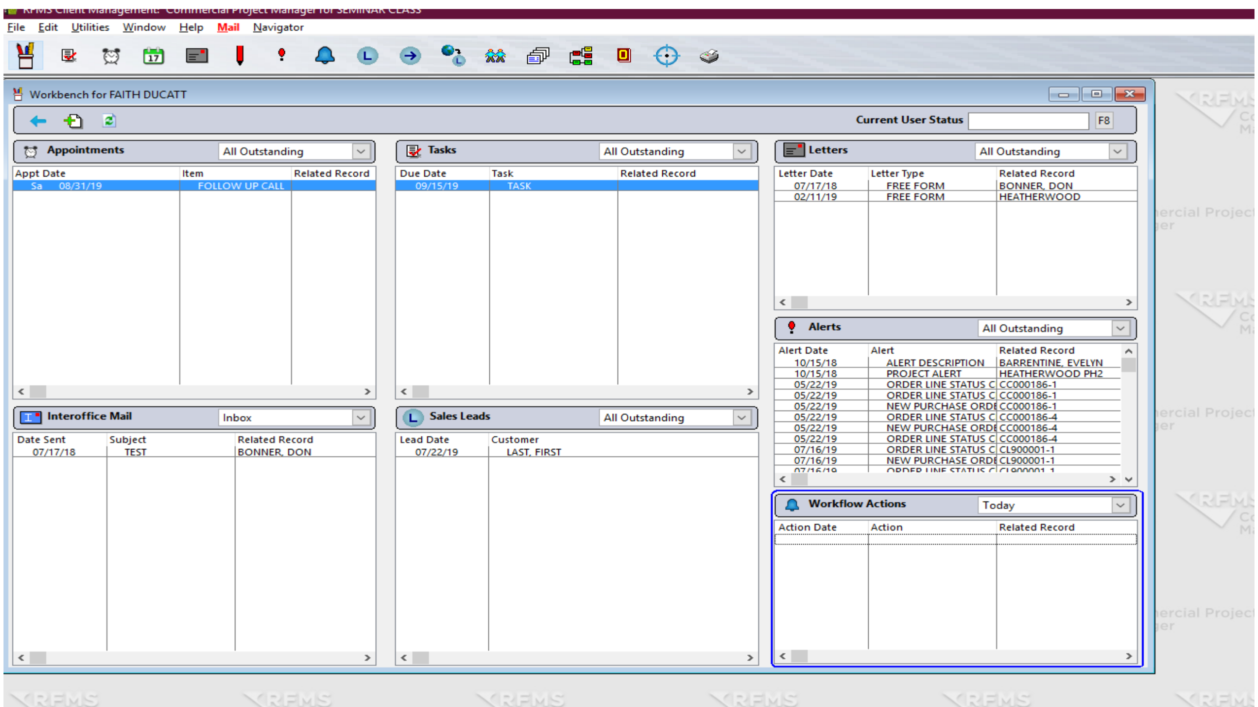
1. **CMM** *for Customer Relationship Management/Lead Handling and Prospecting/Analytics*
2. **Measure Mobile/RFMS Mobile**
3. **Email Integration**
4. **Barcoding**
5. **Using Quotes and Bid Copy Options**
   Associated Bundles
6. **Product Templates**
7. **Line Grouping**
8. **Special PO Info**
9. **Additional Information Tab**
10. **Locking Fields**
11. **Baselines**
12. **Billing Groups**
13. **Overages**
14. **Express Checkout**
15. **My Commission**
16. **Dashboard**
17. **Open Orders/ Copy Browse**
18. **Available Inventory**

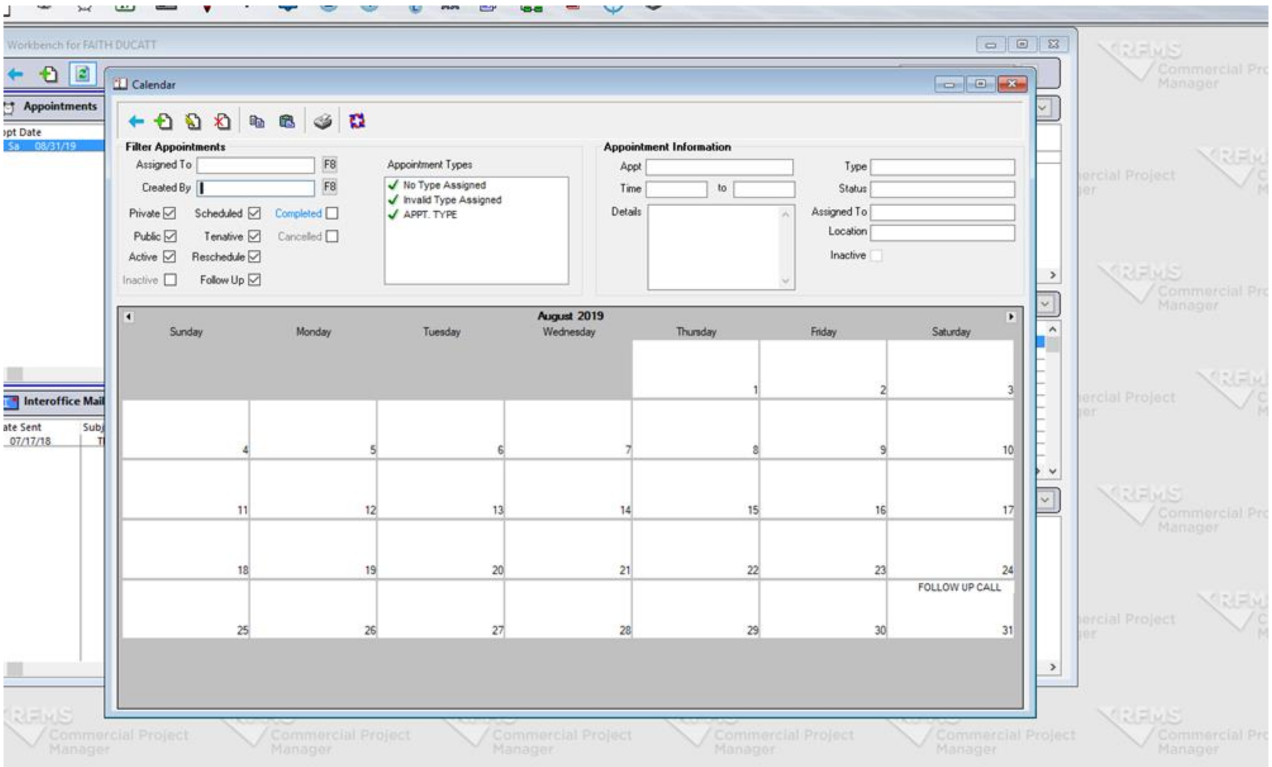
Client Management Module *Integrates with RFMS core for central Client management.* Customer relationship management (**CRM**) program designed to work for you.

This contact management tool provides everything you need to take your sales from start to finish. Convert more prospects into customers and turn one-time customers into repeat clients. Organize all your contact information into a single location. Nurture your Sales to build relationships at every stage.

Salespeople can use this tool to *manage time effectively, prioritize urgency, administer follow up.* Find out more about a prospect before a meeting or call. These include identifying the prospect's interest, previous conversations with the company, or the most recent purchase by checking the associated items attached to the contact record. This module gives you what you need to build a lasting relationship with your customer(s). *

WORKBENCH: The Client Management Workbench is like a user's master to-do list. No more lost notes or missed appointments. And CMM can be integrated with Microsoft Outlook.





The Workbench gives you different quadrants to track:

Appointments: An appointment differs from a task in that it has a start and end time, which must be entered. Appointments also have a location and show on the calendar.

Tasks: Task to be done with the ability to set up a reminder, can set up a list of tasks for tasks that are typically done together.

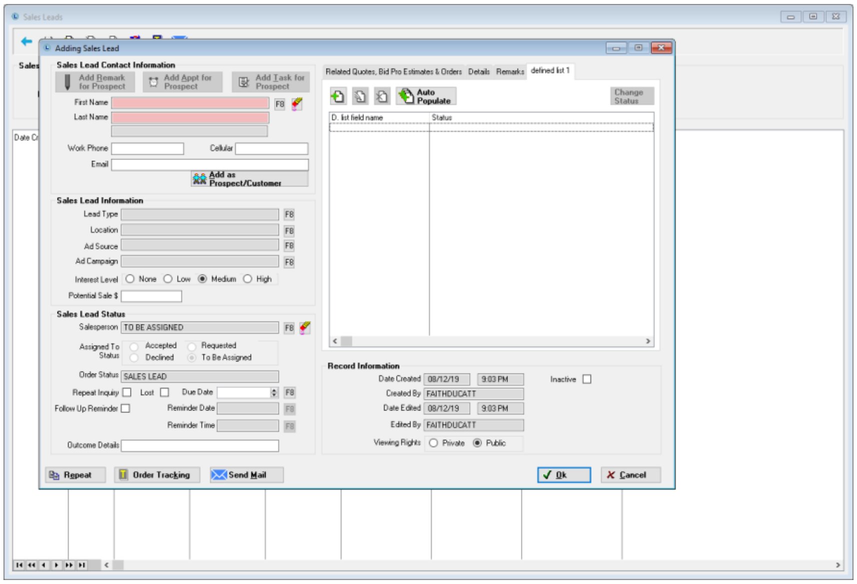
Letters: Enter information or use the Import Template Button to pull information from a previously created template.

Interoffice Mail: *C*lick the mail menu option on any RFMS screen. Inbox, Deleted Items or Sent Items can all be viewed from this same screen.

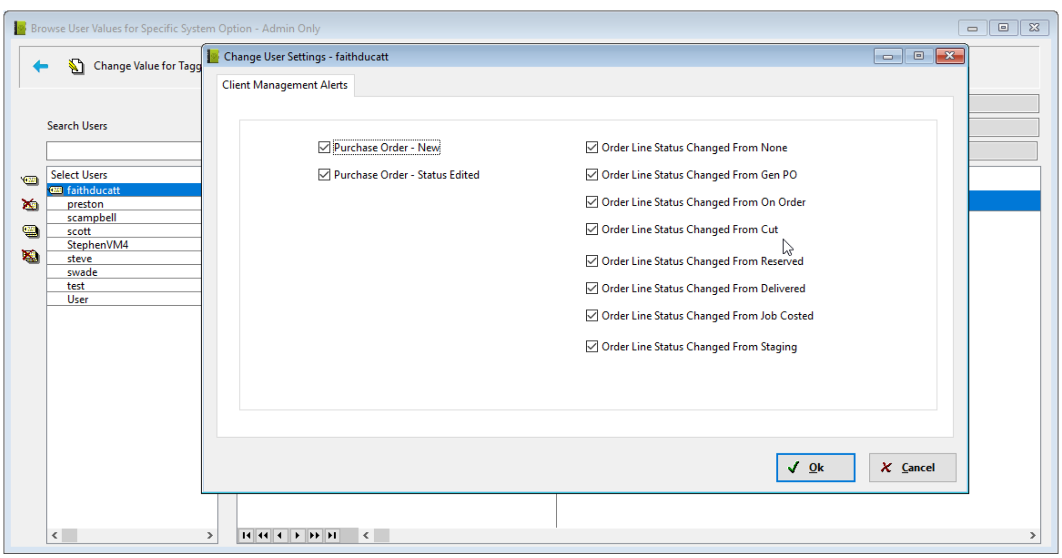
*

- Mange Rotation of incoming Sales Leads
- Collect demographic details
- See your lead conversion rates
- Identify trends
- See Advertising Results *

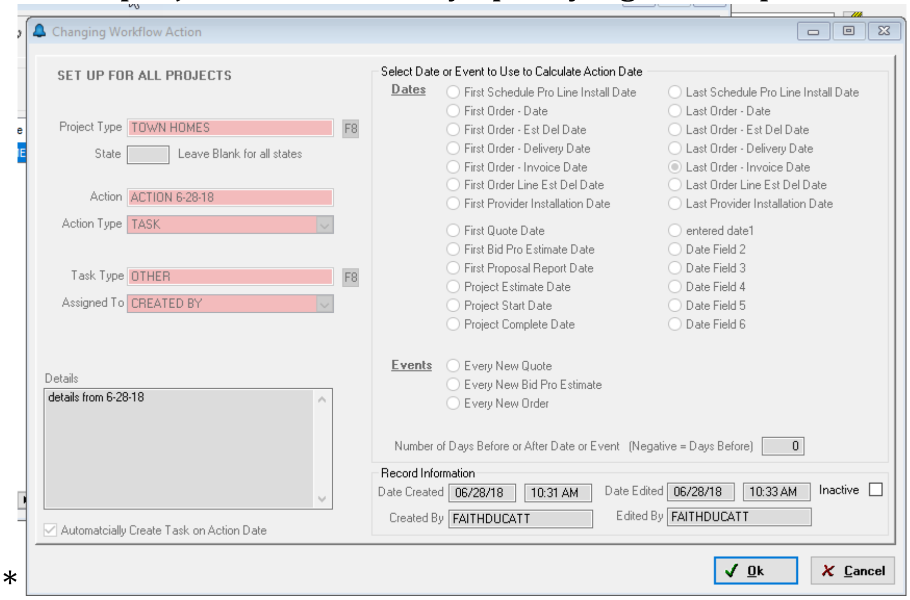
Sales Leads: Not only does CMM give you a central location to track your leads, record details, and remarks, you can also develop lead follow up tools with customized Sales Lead actions and statuses. *



Alerts: These keep salespersons abreast of the progress of orders or to serve as reminders. *System-generated alerts are defined in set up. Receive alerts with line status changes, purchase order updates. And an alert can also be manually entered as well.*



Workflow Actions: Workflow actions do more than “remind” the user; they drive a project’s workflow by specifying when specific actions should take place.



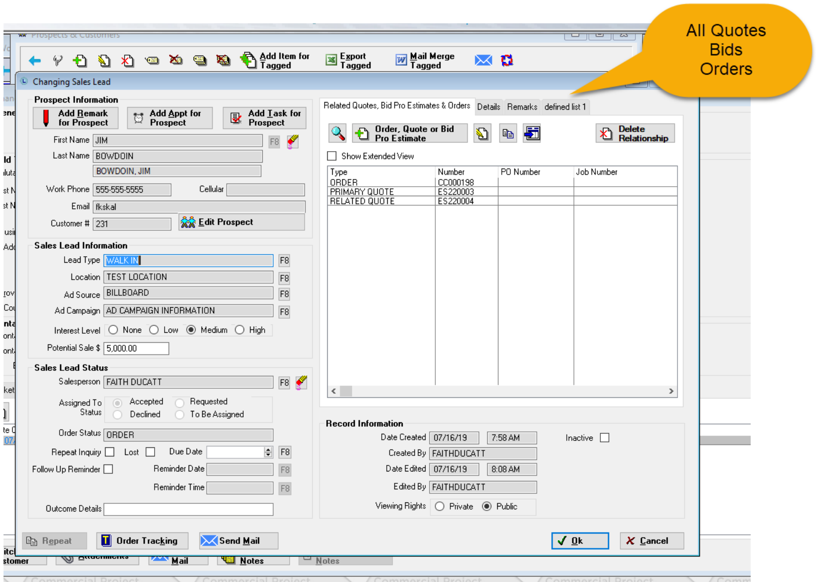
*

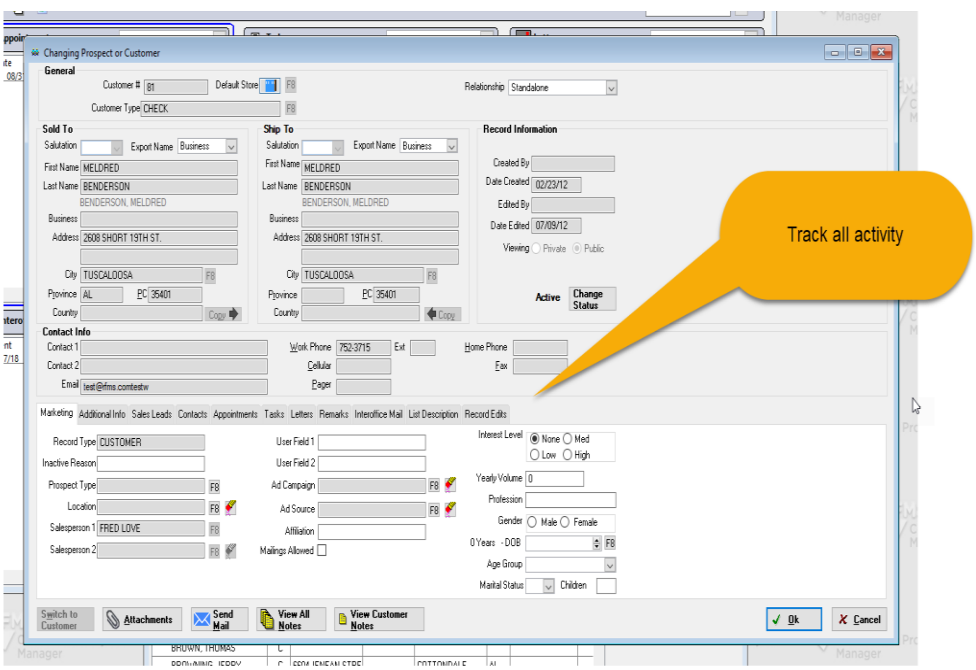
Set up actions triggered by a date or event. Such as

- New Quote
- Last Order Invoiced
- First Schedule Pro line Install Date
- And much more. *

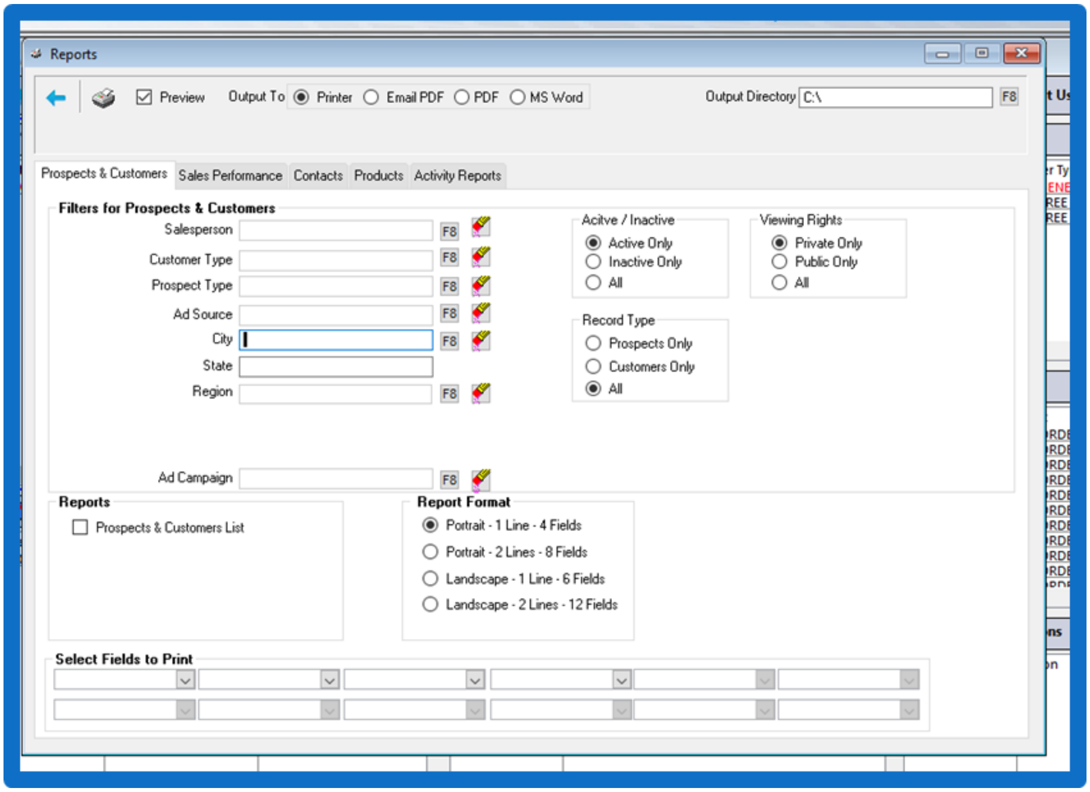
This Module Optimizes Customer Relationship Management Track and manages everything from emails, meetings, files, tasks, alerts, notes, contact history, advertising campaigns, and much, much more. *

Also, once your sales force closes the sale, turn the prospect into a customer in RFMS with the click of the mouse and have all customer interactions, bids, orders, etc.. on one centralized screen. Hard to compare to any other Customer relationship management (**CRM**) program outside of RFMS.





CMM Reports



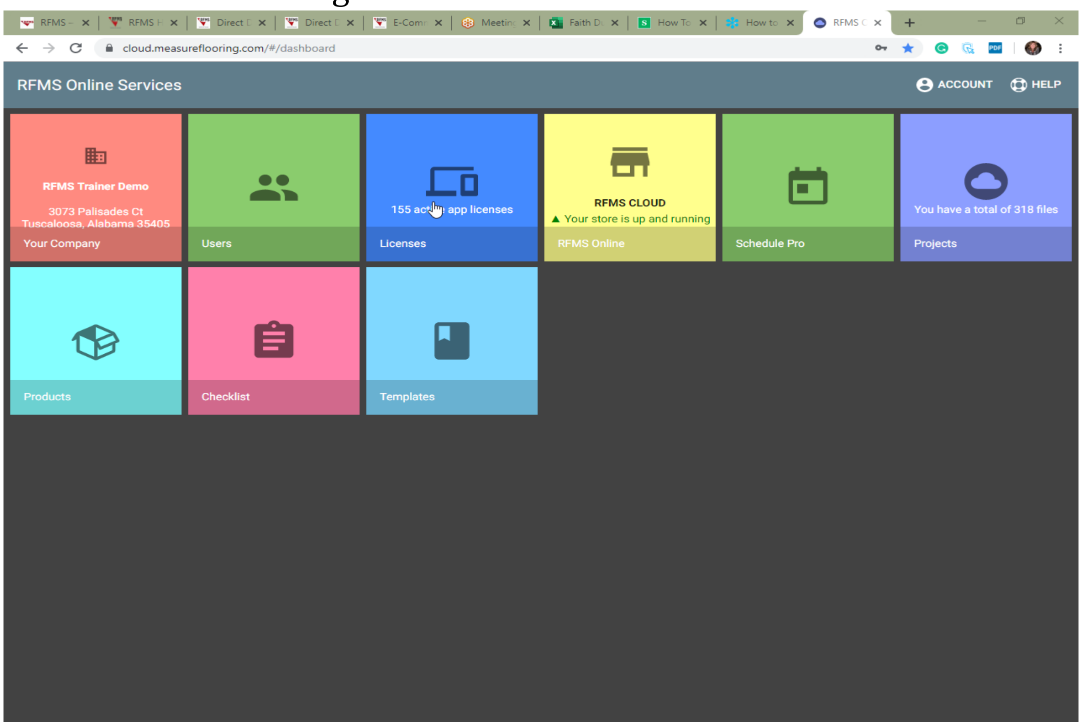
- Prospects & Customers where you can customize report output
- Sales Performance (Conversion Reports)/ Status Reports and Summary reports by sales reps.
- Contacts and Products
- Activity Reports where you can obtain all activity on a specified customer/prospect. *

Go Mobile:

No PC required, interact with the client on the salesroom floor or onsite. All from your mobile device

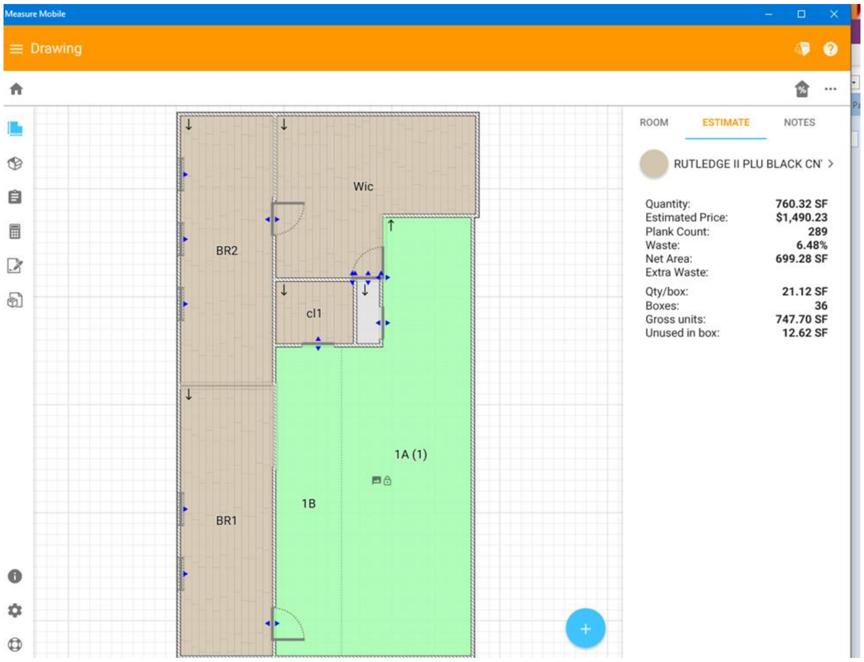
The RFMS Mobile Apps provides direct access to RFMS Order Entry, Products, Pricing, Inventory, and even Schedule Pro. Estimate the quantity of specific products needed on a project, see necessary add on's and services to create a quote, obtain an acceptance signature, close sale, take payment and export to an Order in Core. –RFMS Mobile Apps give sales professionals the ability to stay up to date with their existing quotes and orders at all times and generate new ones whenever and wherever! *

RFMS Online Services (cloud) is the link between mobile apps and RFMS Core. It contains your projects, product information, checklists, templates, etc.
cloud.measureflooring.com *



Measure Mobile

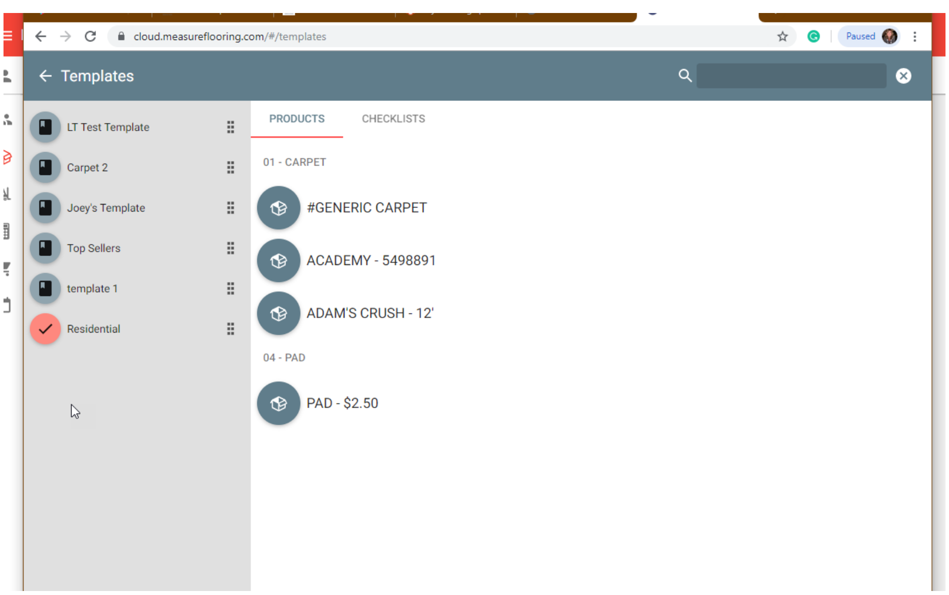
From Mobile apps, you can search, create, update, or edit Sales Leads and Customers. "If you encounter a prospect during an event- use your mobile device to quickly access the contact management tool and key in crucial details."



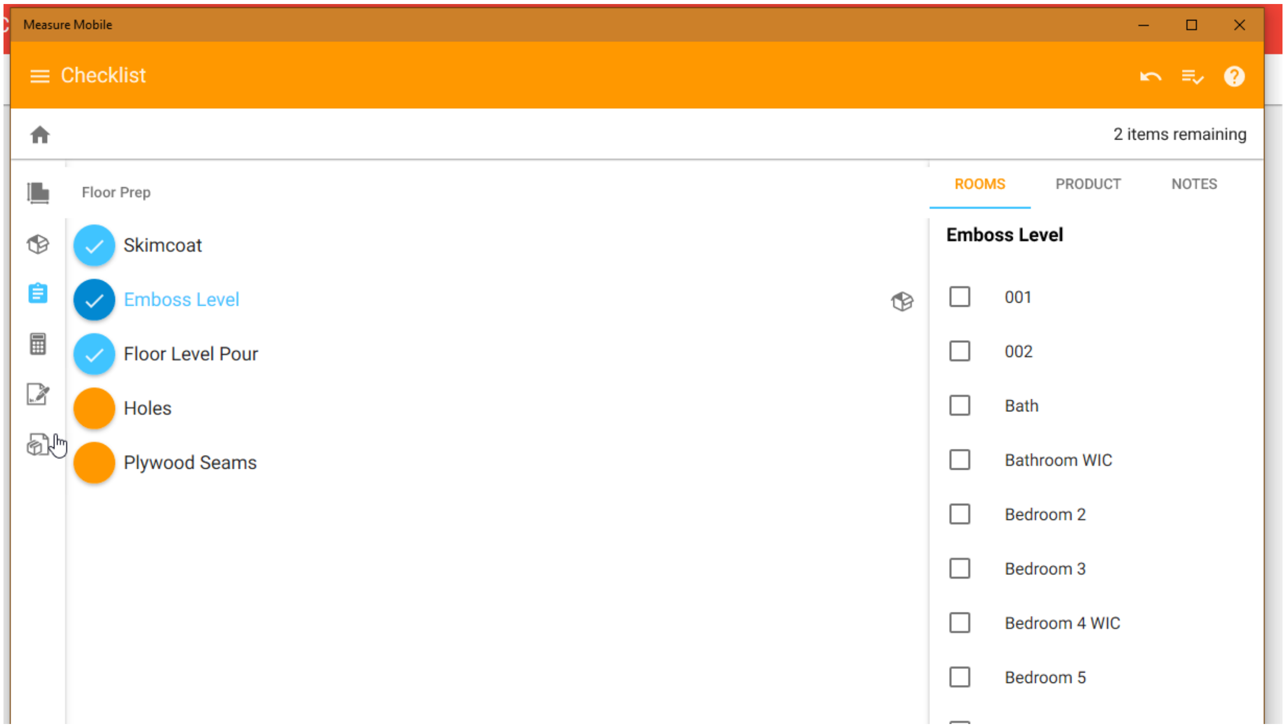
From Measure Mobile Draw: Use Rooms, Line Draw, Touch draw, add cut outs, transitions, stairs. A Blue Tooth measuring tool integration available, add in waste factors, Upload Blueprints, attach pictures, note special circumstances for installation. And 3D art available to produce impressive drawings for your potential client.

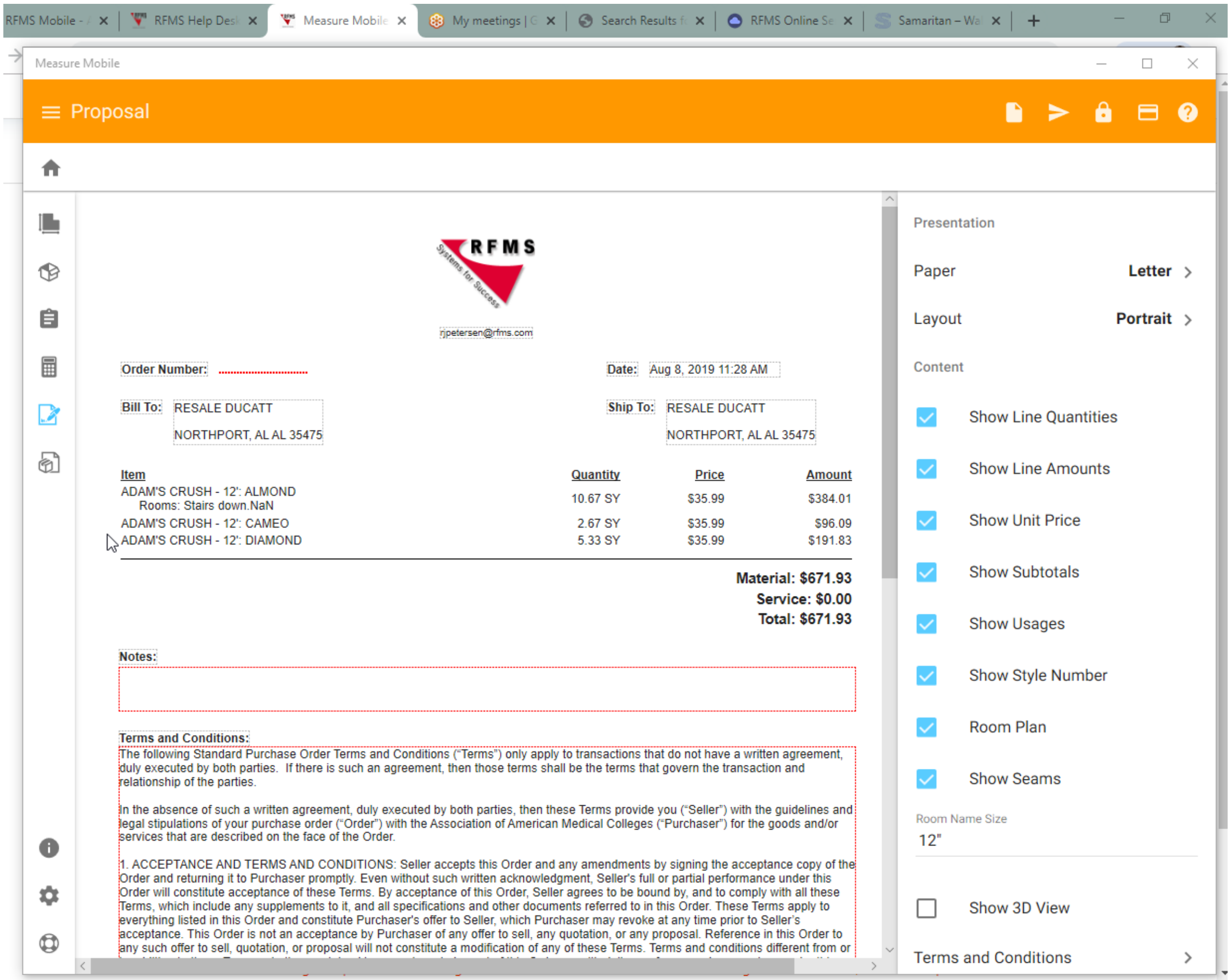
Assign material to drawing to estimate quantities needed, product information pulled from your Core RFMS Products module, as well as pricing information. Barcode samples and simplify the addition of products to the project. *

Use customizable **Templates** to make product selections easier. For example, have a template on top sellers, a template on popular carpet selections, or a template with products you carry in your "shop at home van," etc.



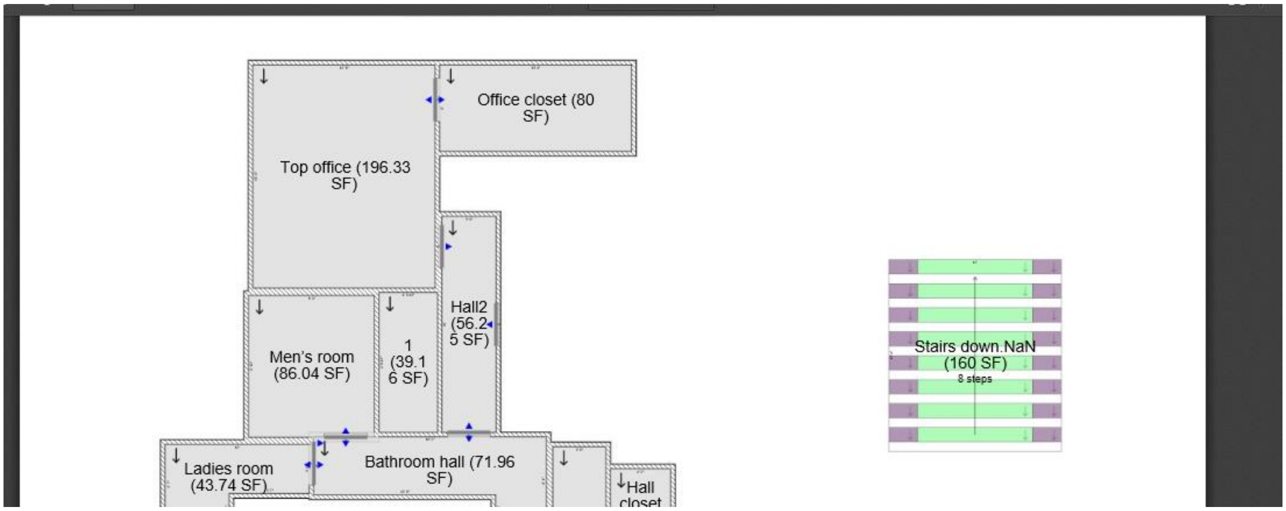
Assign customized **Checklist** items created in the cloud. A checklist can be assigned to specific products, be selected from a list, or set to be selected automatically. Both Templates and Checklist do not require internet service to be used. *





Produce a **Proposal/Presentation** with terms and conditions that can be emailed or printed. **Apply Discounts, Take Payment**, then **export** to RFMS Mobile from the worksheet.
Create in RFMS Mobile a **new Quote, Order or Bid or Merge with an existing Quote, Order, Bid.** These documents are all visible through Core and well as Mobile Apps.

Create, or Edit a Worksheet, Change Price Level, check pricing, check inventory levels, check out samples.
You can even reserve and cut inventory lines from Measure Mobile App. *



Create **Installation documents** with customized notes with drawings that can be printed or emailed to the installation coordinator.
Mobile Work Orders give your installers access to these installation documents via a mobile device and gives them a calendar to view their upcoming installations. *

Email:

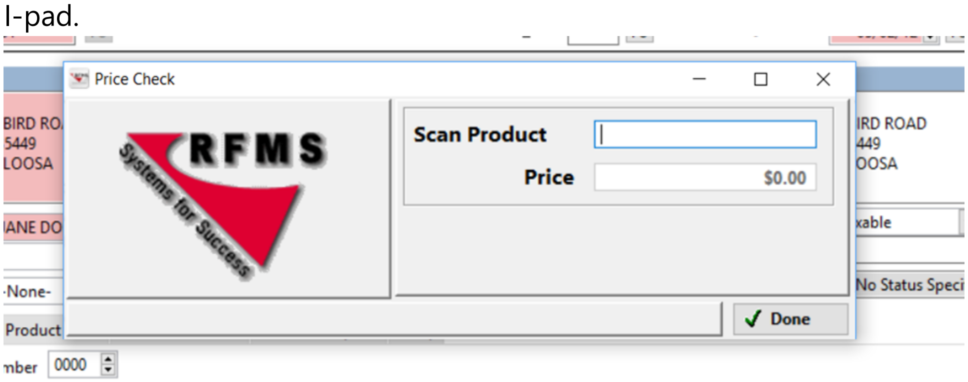
Use emailing directly from RFMS program to send Quotes/Invoices/Receipts. Outgoing emails from RFMS will show in your email outbox.

Email Templates: Filter Order Entry for jobs that meet criteria of your choice and send an email from template you develop for those standard email communications.

Text Messaging capabilities are coming soon. *

Barcoding:

- Barcode samples for easy price check (f7) with bar code scanner attached to PC or from an I-pad.



- **Sample Checkout In quotes**, this is an easy way to scan products for the customer to check out. Check the Sample box and fill in the Sample Info dates
- **Quotes and Order Entry** Entering order lines by scanning the barcode into the Product Code field. This will populate all of the areas into your line. You can adjust your Systems Options to auto-advance to the next line.
- And you can Check existing inventory *

Quotes/Bids:

In both Quotes and Bid Pro, RFMS offers various copy routines. This makes entering changes and updates to an existing bid merely a click of a few buttons.

Enter a Bid once and save as a template to be used repeatedly. Estimate data can be exported directly to RFMS Order Entry or can be merged with other estimates to create an unlimited number of combinations.

Create sub-estimates for a quick and easy method of changing specific portions of a larger estimate.

Quotes can be even be exported to append an existing Order *

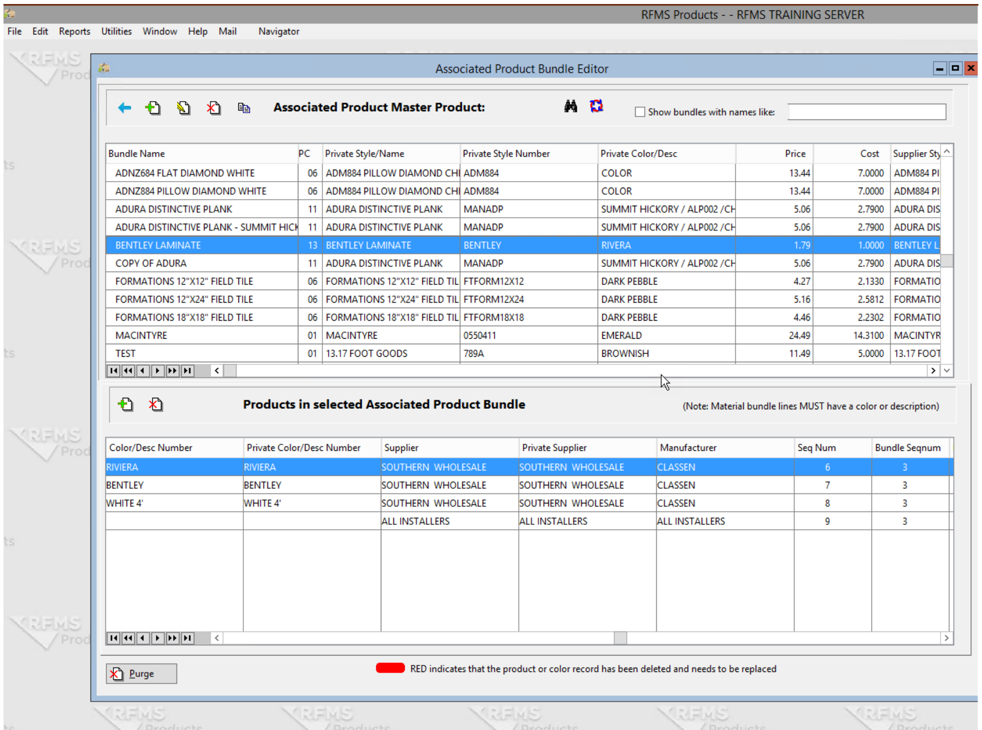
Bid Pro goes a step further by allowing you to **Copy Estimate Lines**, Or **Copy Line Info** which allows copying information onto all tagged or specified lines. *

Associated Bundles:

Build Orders in lightning speed with associated bundles. (also available in Mobile Aps)

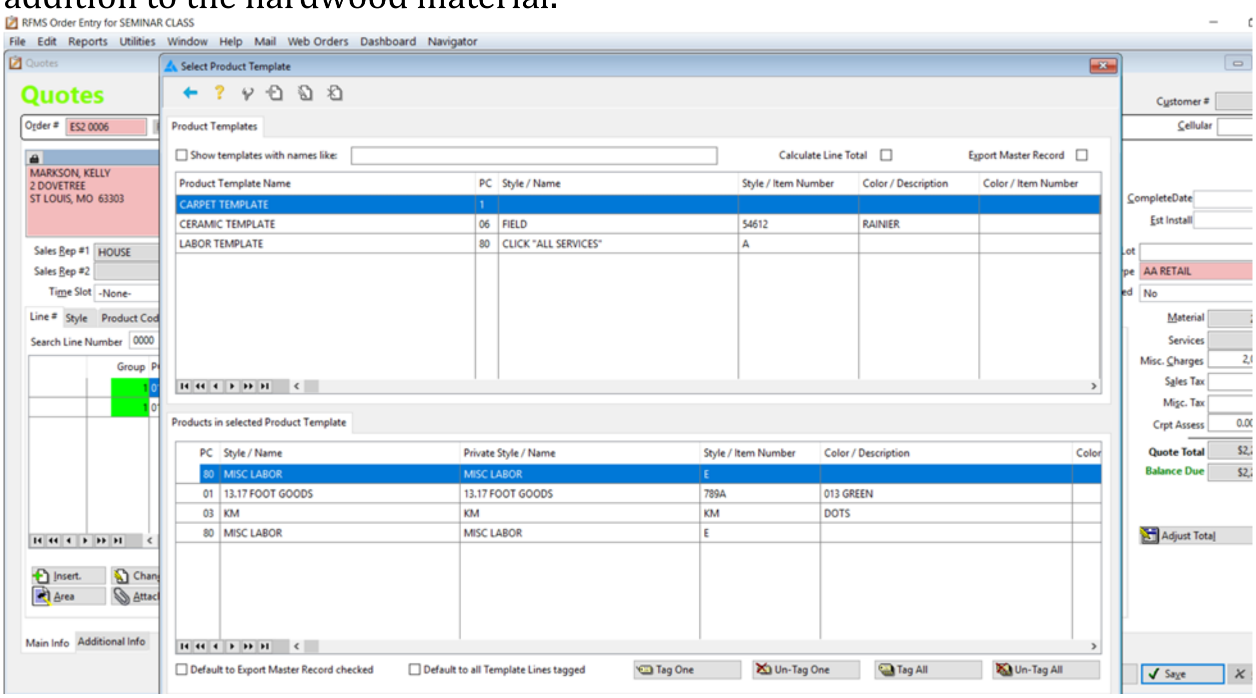
Product records are bundled together, making order building highly efficient. For example, a wood product can be attached to its specific trim piece. When a bundled product is pulled to an order line, RFMS will prompt the user to select, and add those extra bundled items if needed.

Product Bundling allows the entering of multiple products from your Products module together in a specified group. Using this feature makes data entry in the Order Entry, Bid Pro, and Mobile Apps much easier because all products for associated product can be pulled into the Customer Order and lines automatically populated. *



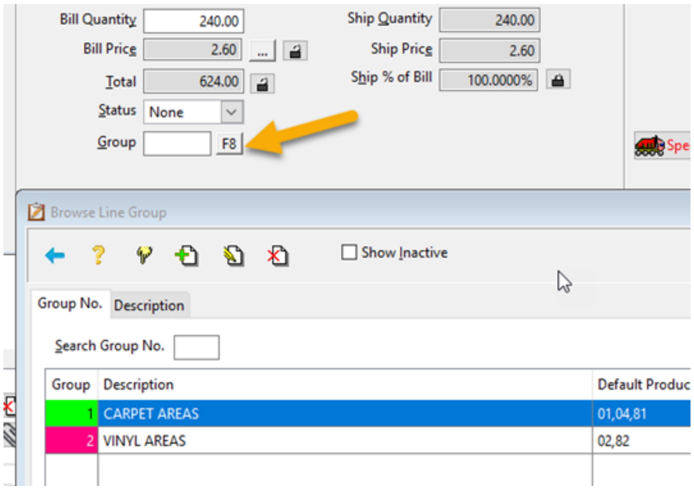
Product Templates:

Efficient order building. The Product Templates feature allows creating product groupings for specific types of jobs. This feature can be used to assist the order entry employee by bringing up required items for a job type that otherwise may be possibly forgotten or overlooked. One example is a Hardwood Install Template created that consists of transitions, glue, and quarter round, in addition to the hardwood material. *



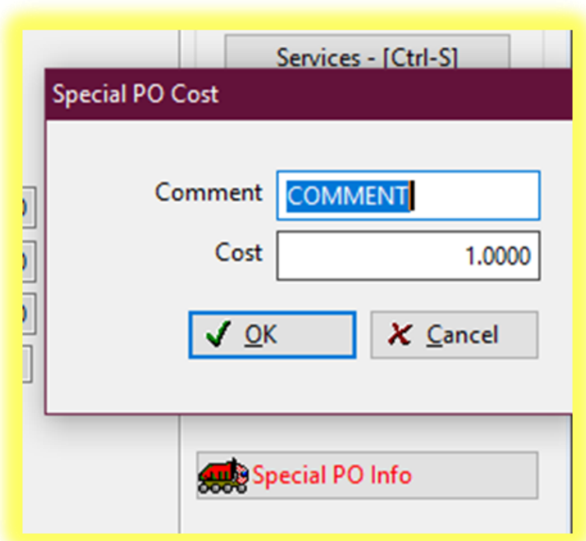
Line Grouping

Allows the printing of an Invoice/Acknowledgement, Estimate, or Claims with Sub Total by each line group.



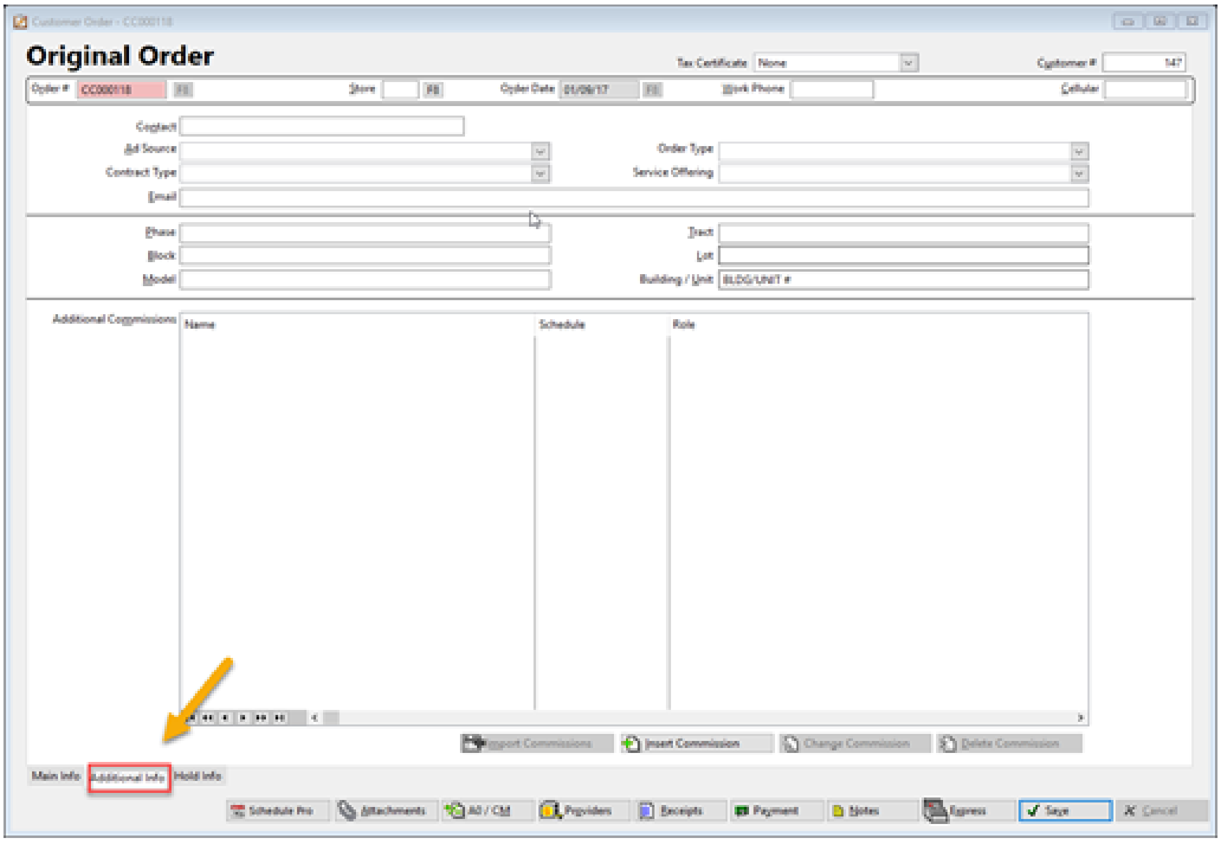
Special PO Info

A Special PO Info box on the right lower side of the Order Line screen when a Roll/Item is pulled from Products. The user will select that box to enter a special cost received. Then, that cost alerts the order desk that a special cost has been negotiated. *



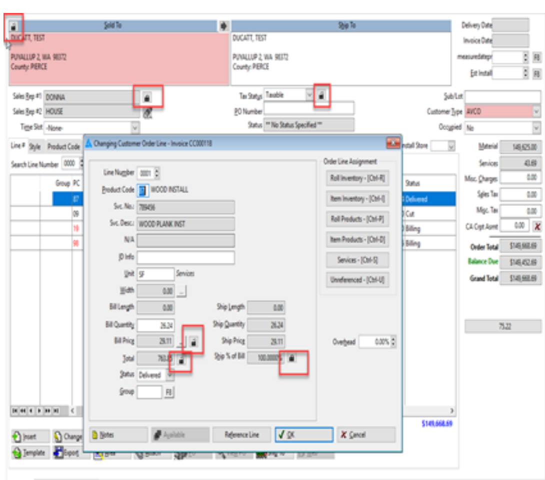
Additional Information Tab

These fields allow users to specify more information on each order and will enable you to run reports based on that information. These fields are user-defined by their drop-down choices. Titles of all except ad source can be changed from system options.



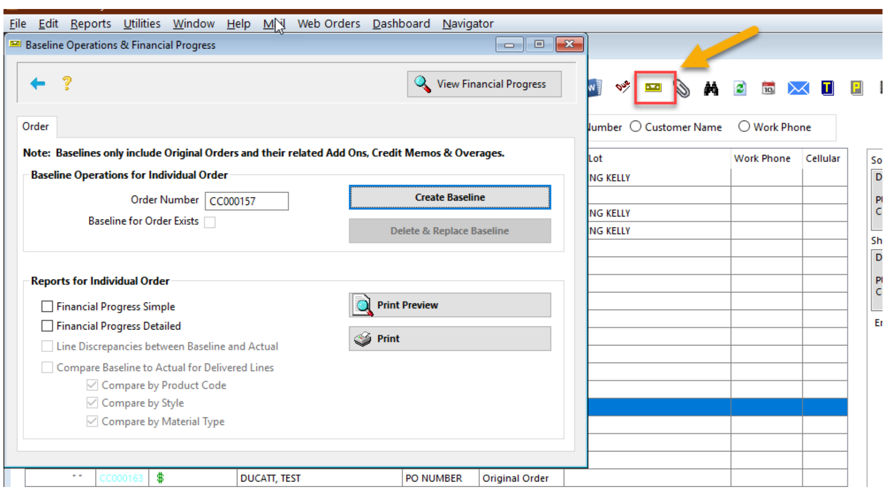
Locking Fields

Sold to, Sales Reps, Tax Status, and Line Total/Unit Price can all be locked by using the padlock icon. Locking the field prevents it from being changed either directly or by changing another aspect of the record. *



Baseline

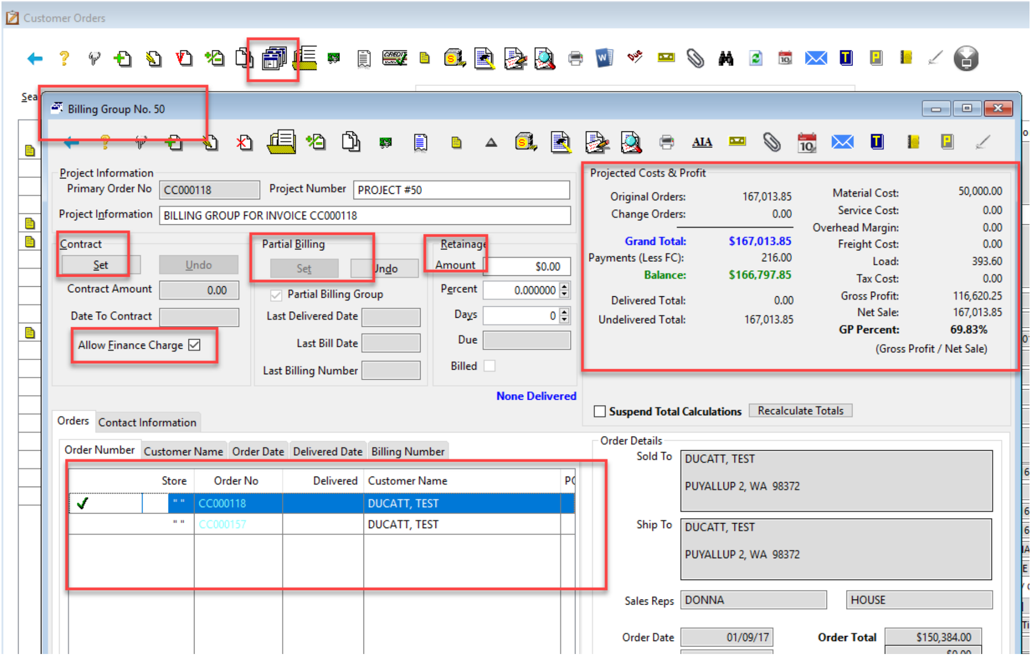
This screen allows you to create a baseline for the highlighted customer order or the billing group that order is a part of. The baseline is a "snapshot" of the order at that moment in time. You may also print a report that compares a previous baseline with the order in its current status. You can use your baseline points to compare how a job is doing over a period of time and the final quantity, cost, selling price, and gross profit percentage. *

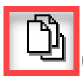


Billing Groups

New or existing customer orders can be linked together by Billing Groups. Set Contract Amount, Partial and Percentage Bill out Orders, Finance Charge, and Retainage information are all contained in a billing group. Projected Costs & Profit information available for all orders within a Billing Group.

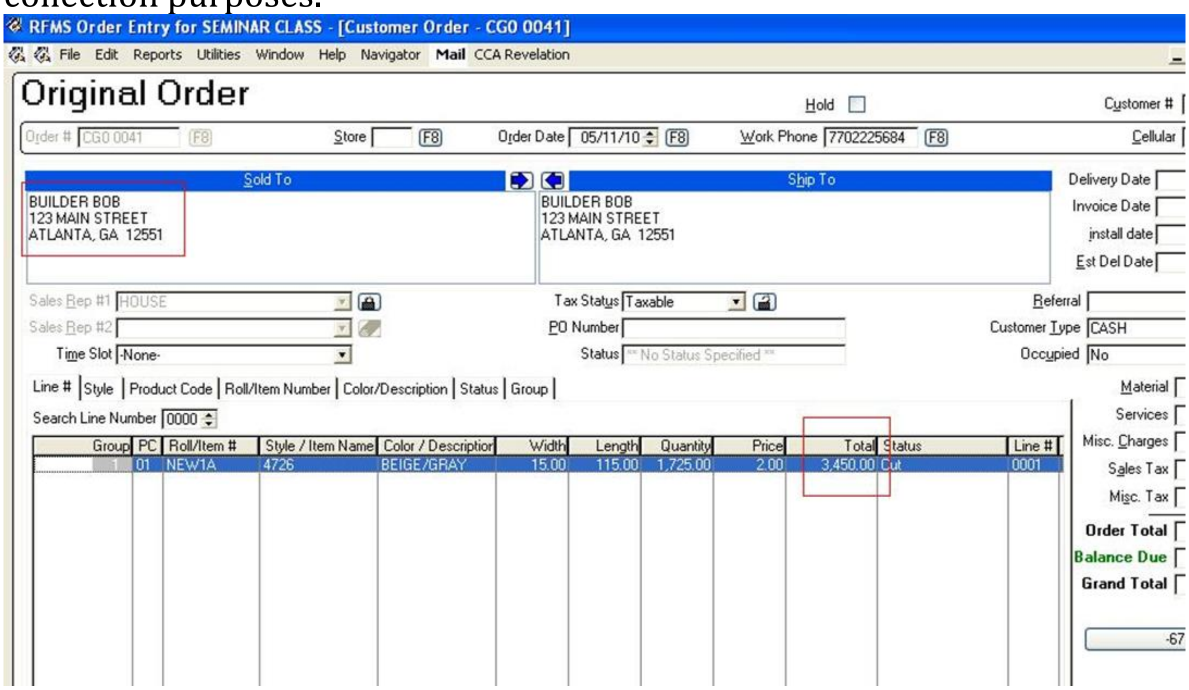
The overall concept works like a filing cabinet to put all related orders into one grouping. *

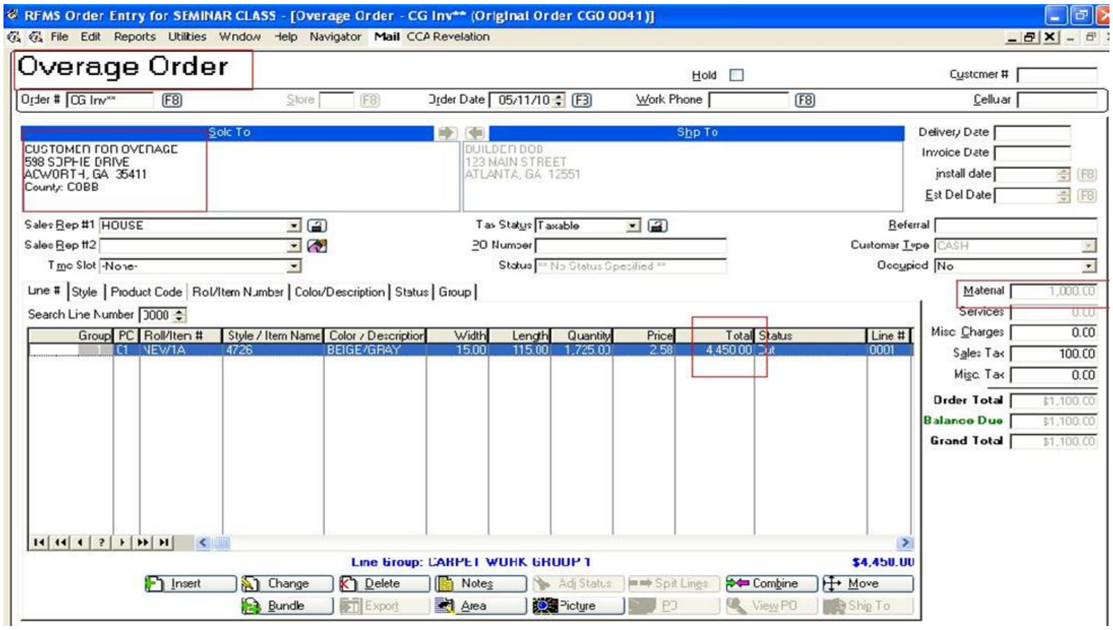


Overages

Allow for dividing the total dollars of order lines up between multiple Sold To customers.

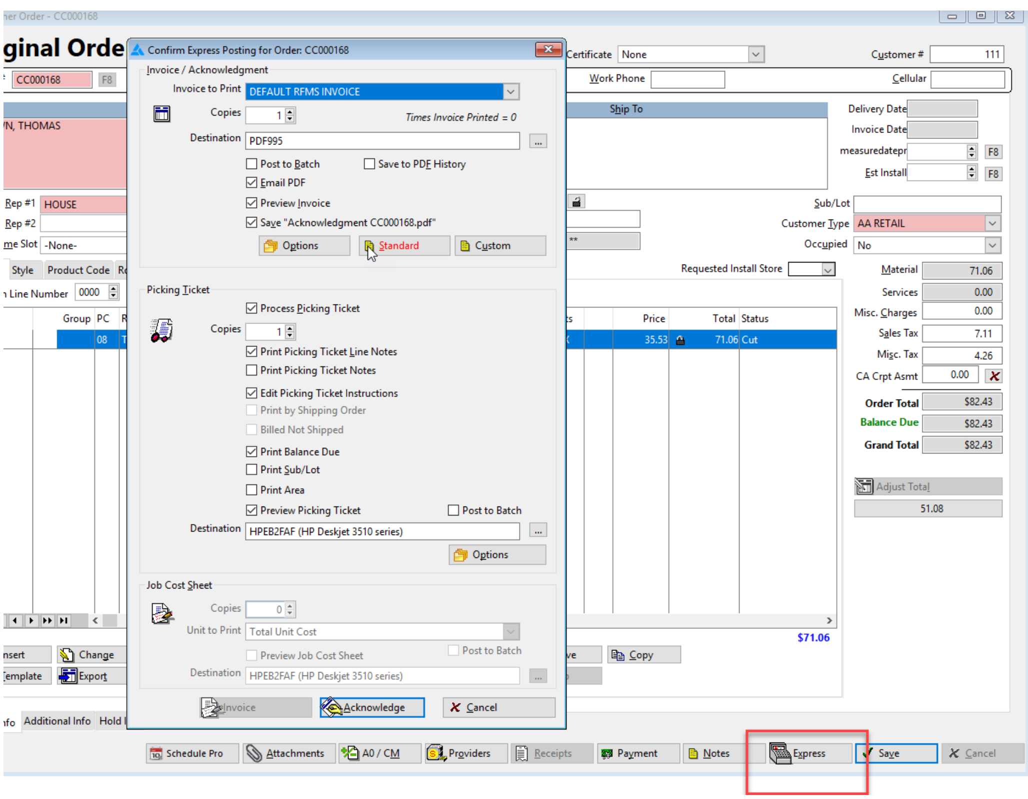
The typical use of the overage is in the builder environment. If a builder has given an allowance, $3450 in our example, and the homeowner chooses upgrades, $1000 in our case, the overage allows the management of the job with one series of lines for purchasing, cutting, etc. but with multiple headers for collection purposes.





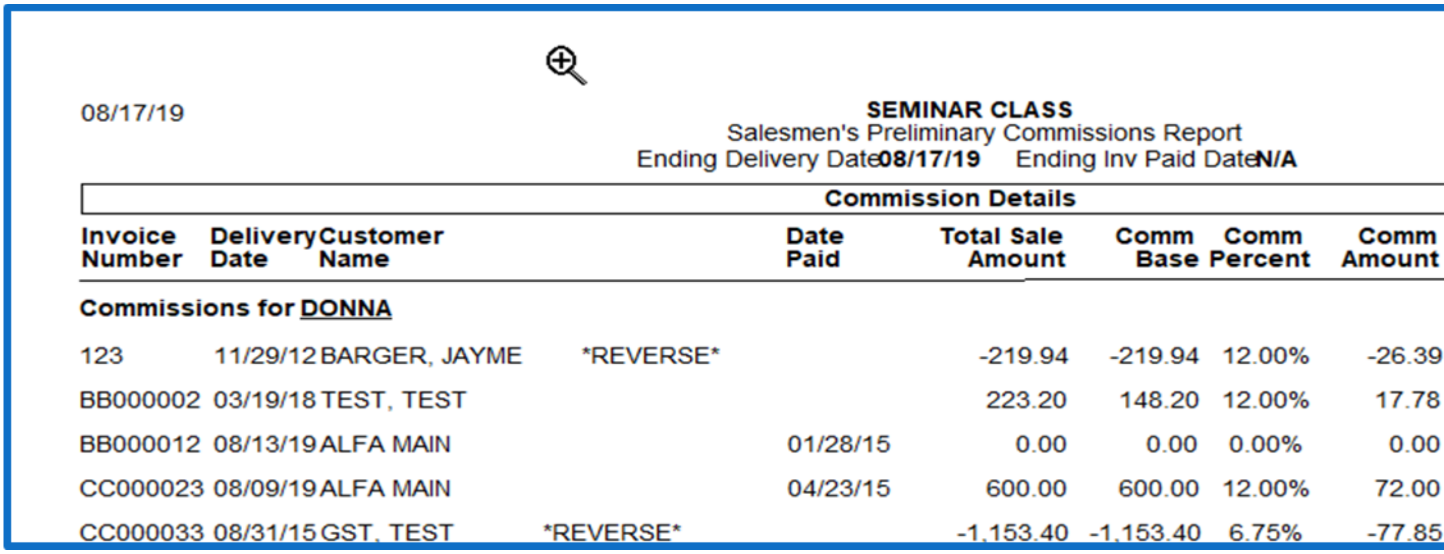
Express Checkout:

Allows printing all applicable customer documents and possibly job costing in one quick step. It is possible to specify a different printer for each document. For example, print the Invoice at front desk workstation, then print the Picking Ticket to the warehouse where the customer will pick up the material, then print the job cost sheet to the accounting desk. This is useful for Cash and Carry sales with no labor, and for use in the warehouse for supplies. *



My Commissions

Order Entry Report for a Sales Rep to print their preliminary commission report. It uses the same report routine as the preliminary commission's report from accounting but is limited to the sales rep, which is printing it.



08/17/19

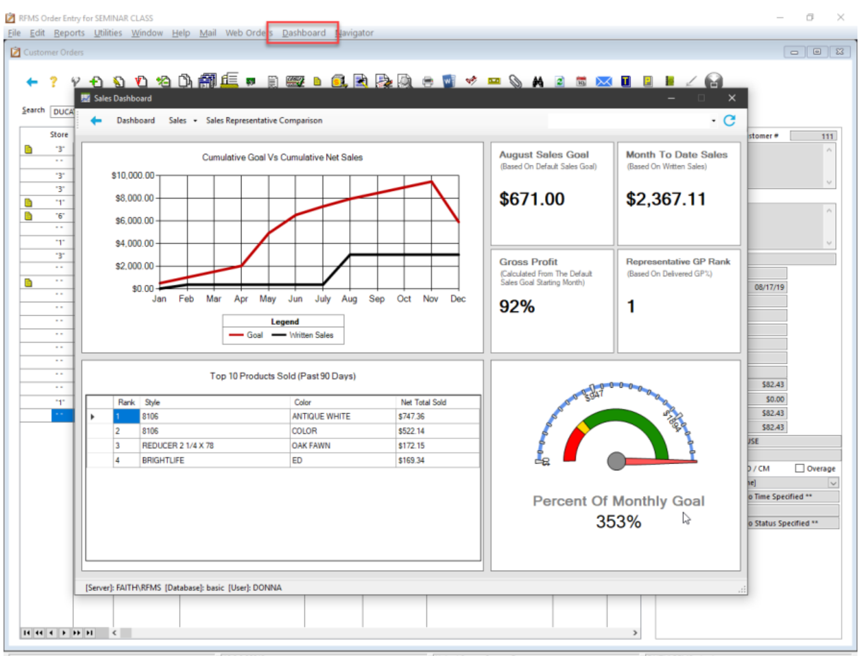
SEMINAR CLASS
Salesmen's Preliminary Commissions Report
Ending Delivery Date **08/17/19** Ending Inv Paid Date **N/A**

Commission Details

Invoice Number	Delivery Date	Customer Name		Date Paid	Total Sale Amount	Comm Base	Comm Percent	Comm Amount
Commissions for DONNA								
123	11/29/12	BARGER, JAYME	*REVERSE*		-219.94	-219.94	12.00%	-26.39
BB000002	03/19/18	TEST, TEST			223.20	148.20	12.00%	17.78
BB000012	08/13/19	ALFA MAIN		01/28/15	0.00	0.00	0.00%	0.00
CC000023	08/09/19	ALFA MAIN		04/23/15	600.00	600.00	12.00%	72.00
CC000033	08/31/15	GST, TEST	*REVERSE*		-1,153.40	-1,153.40	6.75%	-77.85

Dashboard Overview

This feature is an "at-a-glance" view of sales information by salesperson. Month and Year-to-Date totals sales, goal amounts, top products sold, rank for projected goals for the year, etc. *



Open Orders

From Order Entry Browse screen use black binoculars to sort for undelivered sales. To print sorted screen click on Ctrl>Alt>Shift>C then paste into an excel document.   This can be done to any browse screen throughout the program.

You could also utilize for past customer engagement to encourage repeat business and referrals. If you are CMM user, you can automate your customer follow up, but can also do a within order entry. Using the black binocular filter as well

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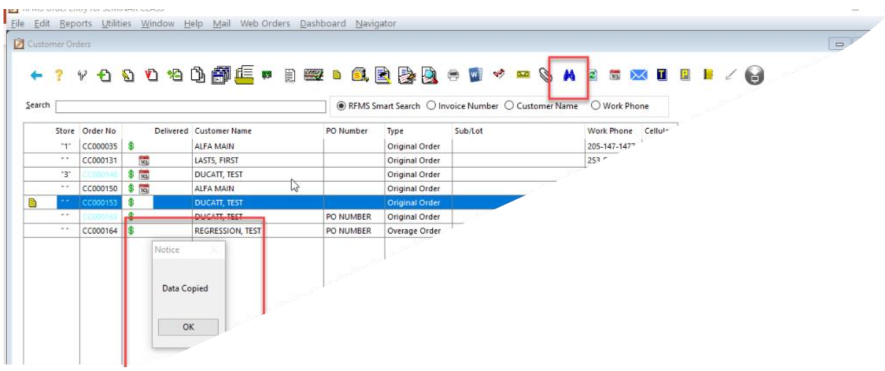
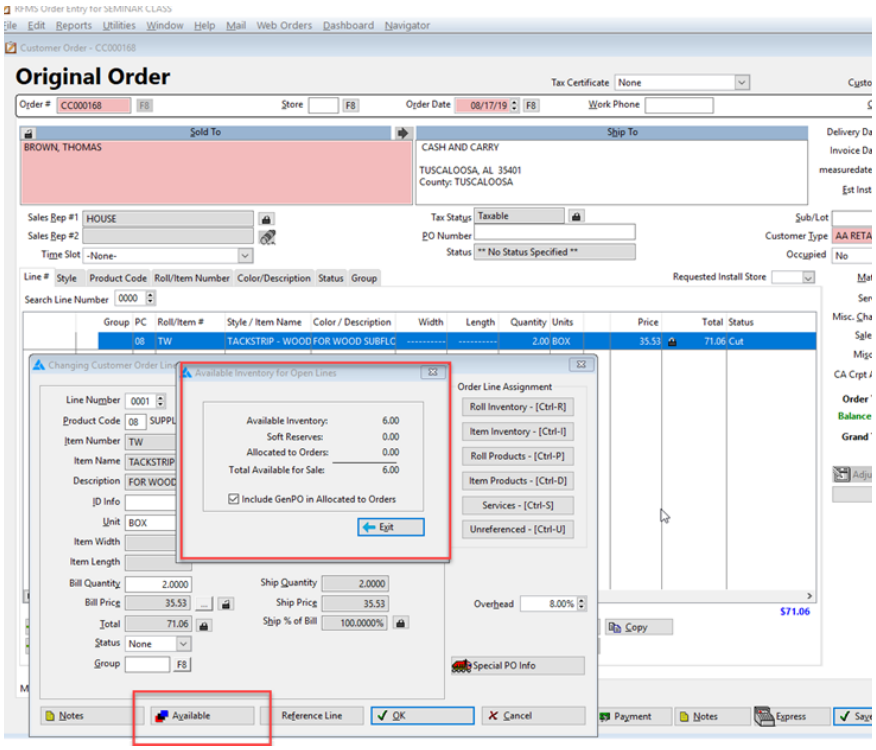
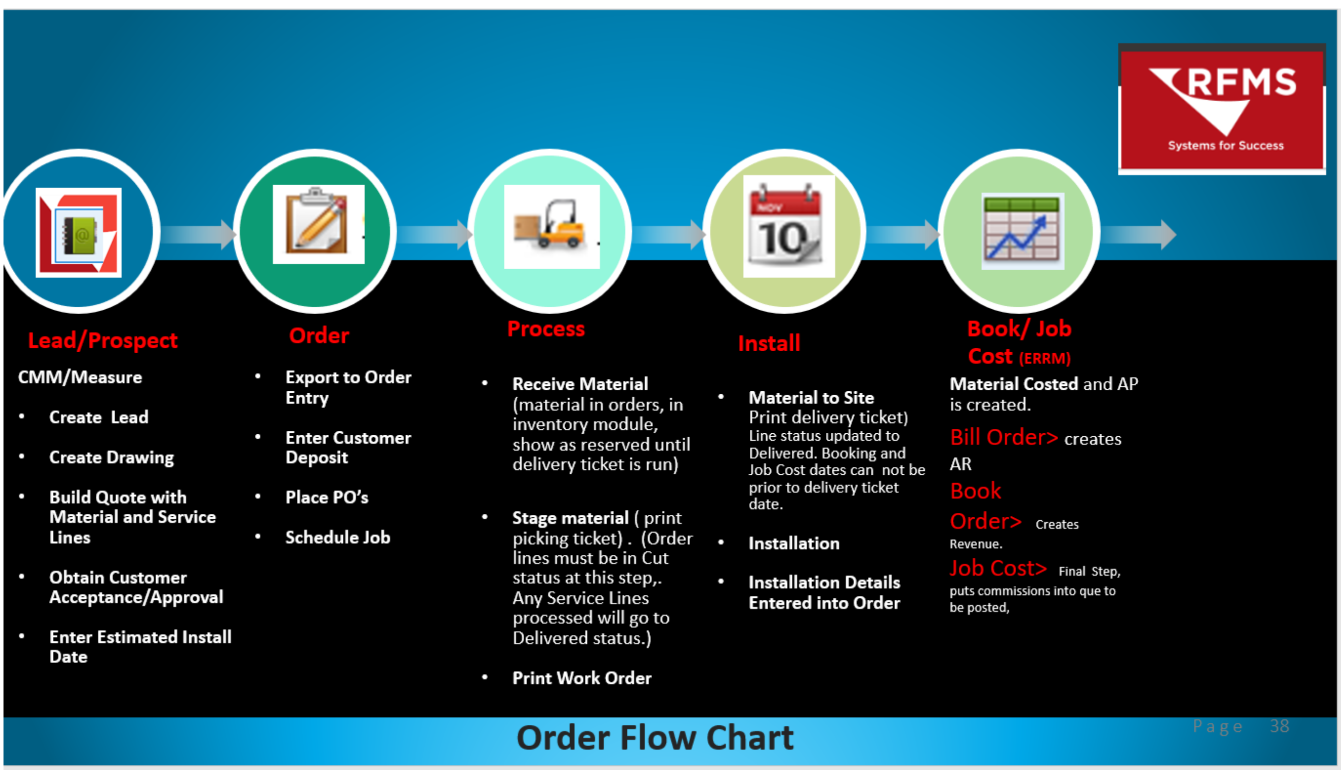


Available Inventory

This button allows you to access inventory amounts from Order Entry without accessing the Inventory module.
When creating an Order Line, the button will display if the order line is:

- pulled from Products
- has a Roll/Item Number, Roll/Item Name and Description*





Thank you for joining us today.