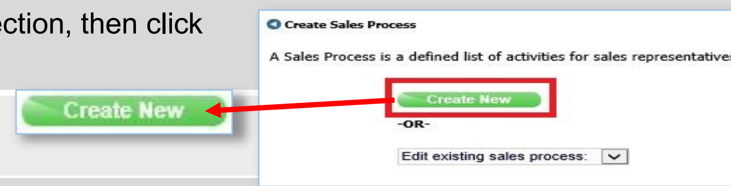
Web Control Creating and Assigning Sales Processes

Sales Processes in Web Control allow Manager Users to create automated steps for generating prospect contacts for salespeople. Sales Processes can be used to create follow up reminders on the Organizer or as Automated Emails. Sales Processes can contain up to 25 steps.

Initially, Manager Users would need to create a process with the desired steps (Page 1) then assign the processes to trigger from desired criteria (Page 2).

CREATING A SALES PROCESS

1 Click the **Tools** tab and from the *Sales Processes* section, then click **Create/Edit Sales Process**.



2 Click **Create New**.

3 In the *Enter a Sales Process name* block, enter a title for the process.

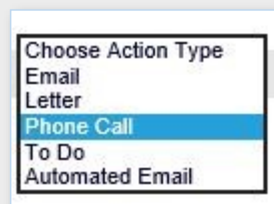
4 The *Enter a brief sales process description* block allows for a description of the process (optional). Click **Submit**.

CREATING SALES PROCESS STEPS (NON-AUTOMATED EMAILS)

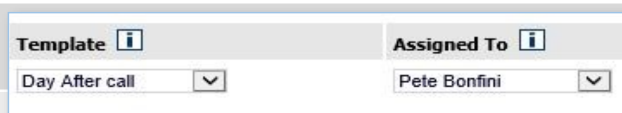
1 Enter the *Timing* interval and select min(s), hr(s), day(s) or month(s) from the list. Timing defines when the action is scheduled.

2 Select the **Action Type.**

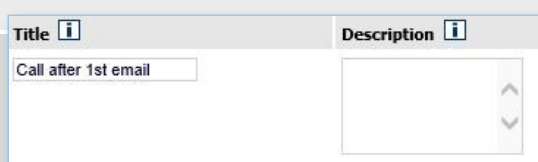
- *Email* schedules a manual email on the Organizer
- *Letter* schedules letter on the Organizer.
- *Phone Call* schedules a call on the Organizer.
- *To Do* schedules a general reminder on the Organizer.
- *Automated Email* schedules an automated email to be sent (See the **Automated Email** guide for more information).



3 Select a *Template* to be used with the process (optional).



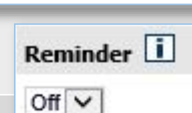
4 Select the rep the action is *Assigned To*. The Default Salesperson is the salesperson who owns the prospect.



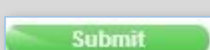
5 The *Title* will appear in the Organizer as a reminder of the activity.

The *Description* (optional) further defines the reason for the action.

6 *Reminder* would generate a pop-up before the action. This is *Off* by default.



Click **Submit** to add the step.



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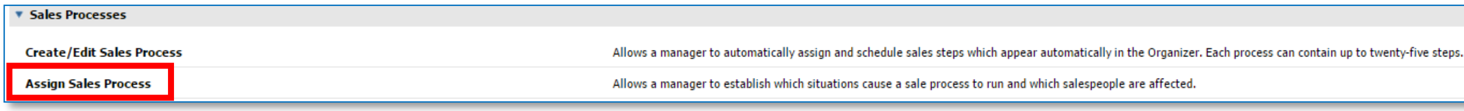
Once a Sales Process has been created, the **Assign Sales Process** function allows you to define the situations that will "trigger" processes to run.

TO ASSIGN SALES PROCESSES

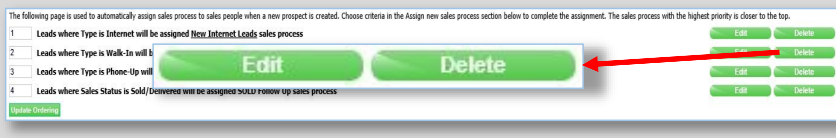
1 Click the **Tools** tab.

2 From the *Sales Processes* section, click **Assign Sales Process.**



3 In the *Assign Sales Process* page, processes already assigned will be listed to the top.

The **Edit** and **Delete** buttons to the right allow for changes to the assignments.

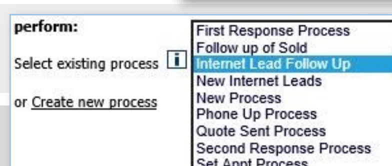


4 The *Add New Assignment Criteria For Sales Process* area to the bottom allows for additional processes to be assigned.

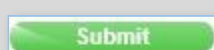
From the *All leads where* list, select the desired criteria in which the process should apply — e.g.,, *Makes* for the VOI, *Source* for the provider from where the prospect originated, *Type* for the type of prospect created (Walk-In, Phone, Internet, etc.), *Sales Status* for the status folder in which the Prospect Record is placed.

5 In the *is equal to* list, select an item to further define the assignment criteria. For example, if you want to trigger a sales process when a new Internet Prospect is created, you can select *Type* from the *All Leads Where* list and then *Internet* from the *is equal to* list.

6 In the *perform* section, select an existing process from the list.



7 Clicking **Submit** assigns the process to the criteria selected.



Notes:

- Multiple criteria cannot be selected in one process assignment. If you need to assign one process to multiple criteria (e.g., one process assigned to Phone and Walk-in prospects), you would need assign the process to one criterion, then assign again to the other criterion.
- Once processes are assigned they will be in a numbered order. If you assign processes off of criteria that could negate each other (e.g., off of lead **Type** and to the **Sales Status** of *New*), you will want to number the assignments in order of importance to the dealership and **Update Ordering**.
- Only dealerships with the Advanced package of Web Control can assign processes to the Sold Sales Statuses.