

CX TEAM

Estimating / Quoting

ACCOUNT MANAGER (AM) **or** ACCOUNT TEAM REP (ATR) receive RFQ

- Opens up OPPORTUNITY in Salesforce (SF) **or** does QUOTE and assigns to an OPPORTUNITY
- AM fills out Spec Sheet and CHATTER posts Spec Sheet and Plan PDF in SF Opportunity **or** provides to ESTIMATOR (EST) **or** ATR prepares quote
- EST **or** ATR CHATTER posts to AM in SF Opportunity **or** informs AM that quote is ready **or** sends directly to customer

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Select Salesforce OPPORTUNITY RECORD TYPE

- Single
- Multiple Account Tender
- Non-Pipeline Quotes
- Account Monthly

Select OPPORTUNITY TYPE

- Standard, Project or Project w/ installation

48 hour minimum return on quotes – unless an earlier date is agreed upon

Quote Review by Account Type

Volume Home Builder, Dealer

- ATR **or** AM sends to CUSTOMER, confirms details, revises, if needed, to produce a final quote for order

Custom Home Builder, Contractor, Commercial, Consumer

- AM responsible for presenting quote, confirms details, revises, if needed, to produce a final quote for order

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ATR ensures an OPPORTUNITY is in place prior to ORDER Upload, if no OPPORTUNITY

- ATR or AM creates an OPPORTUNITY assigns Quote prior to uploading

ORDER

AM **or** ATR responsible for preparing ORDER BUNDLE per WORKFLOW

- ATR uploads the order to Schedule
- ATR post ORDER BUNDLE in SF OPPORTUNITY in Notes & Attachments [Branches only]

Order to be analyzed within 48 hours

- AM and ATR monitors Orders not Processed email and responses accordingly

For ORDER RECAP select;

- Call Customer
- No call, Customer will call
- No call, schedule as requested

SHIPPING

Per Standard or Project Order WORKFLOW

SERVICE

AM, ATR or ACCOUNT sends in completed Service Request Form **or** sends a email to connectyou@durabuiltwindows.com – include all pertinent information

- Auto email sent with CASE number
- CONNECT YOU responsible for scheduling service calls
- Service to order parts for Technician, performs scheduled calls

CONNECT YOU closes CASE

- Auto email sent

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CONNECT YOU

ATR or AM to CHATTER email post pictures or other related information in the CASE

ATR or AM responsible for ordering chargeable products. SERVICE responsible for ordering chargeable parts

CASE Follow up

- ATR or AM to Chatter post in the CASE – include CASE owner name (@case owner name)
- Customer (Account), ATR or AM can also send an email to connectyougroup@durabuiltwindows.com
- **NOTE:** Do not send CASE follow up emails to connectyou@durabuiltwindows.com – this will open up another CASE
- CASE owner will reply back within 24 hours