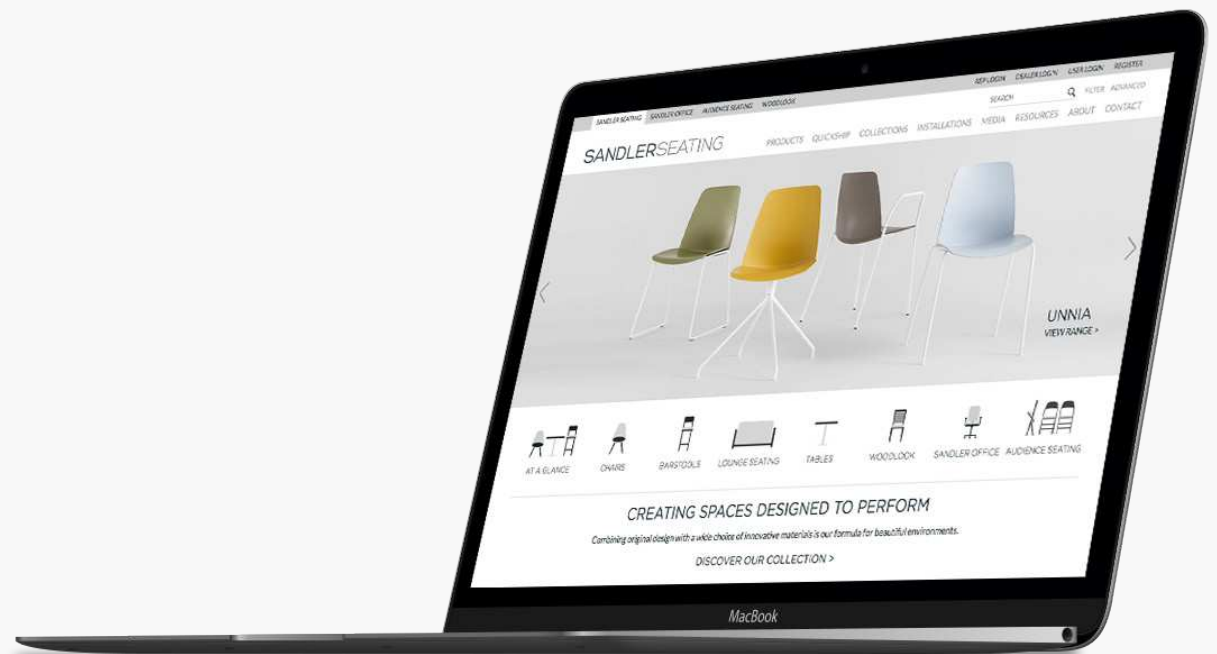


Reps / Rep Group Principals

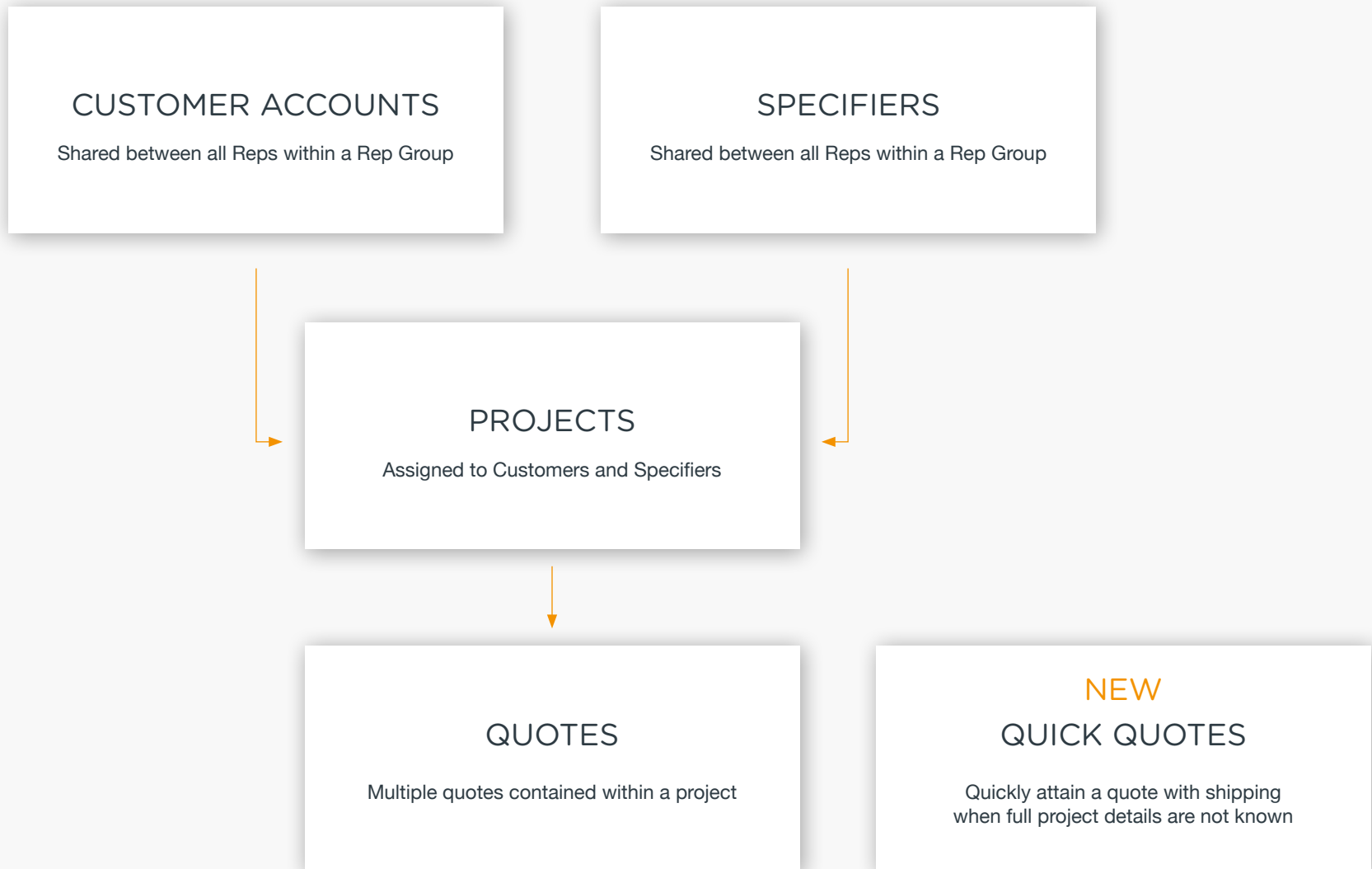
CRM USER GUIDE

September 2019



SANDLERSEATING

OVERVIEW



CUSTOMER ACCOUNTS

Full Customer list available to all Reps within a Group

Which Rep in the Group added the Customer

Any Rep within a Group can create a Customer Account

View full customer details (next page)

ADD NEW CUSTOMER

Company Name	Contact Name	Email	Country	State	Rep		
Apple	Apple Core	dummy@apple.com	USA	GA	Mark Ashmore	View/Edit	Delete
Hilton	Mr Hotelier	dummy@hilton.com	USA	GA	Mark Ashmore	View/Edit	Delete
McDonalds	Ronald Mac	dummy@mcdonalds.com	USA	GA	Mark Ashmore	View/Edit	Delete
Grand Hyatt	Grant Hy	dummy@grandhyatt.com	USA	GA	Mark Ashmore	View/Edit	Delete
Marriott	Mr Marriott	dummy@marriott.com	USA	GA	Mark Ashmore	View/Edit	Delete
Westin	Willy Westin	dummy@westin.com	USA	IL	Rosie May	View/Edit	Delete
MGM Grand	Betty Winnings	dummy@mgmgrand.com	USA	NV	Ted Pupster	View/Edit	Delete

CUSTOMER ACCOUNTS

ADD NEW CUSTOMER

Company Name*

Contact Name*

Email Address*

Country*

State (USA only)*

Address*

Telephone

ADD CUSTOMER

CUSTOMER ACCOUNT PAGE

You can edit all details here

Multiple contacts can be added to each Customer

The preferred contact will be the default contact on new projects

All of your projects assigned to customer are listed here

+ Click to reveal quotes within the project

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EDIT CUSTOMER

Company Name*

Apple

Contact Name*

John Smith

Email Address*

jsmith@apple.com

Country*

USA

State*

GA - Georgia

Address

Global HQ
Street Name
Town Name

Telephone

07894561237

SAVE CUSTOMER

CONTACTS

John Smith ✓

jsmith@apple.com

GA, USA

7894561237

Global HQ
Street Name
Town Name

Edit Contact

Tom Jones

tjones@apple.com

GA, USA

45678912346

Regional Office
Street Name
Town Name

Edit Contact | Make preferred

ADD NEW CONTACT

PROJECTS FOR THIS CUSTOMER

Expand all | Collapse all

5 projects found

Project Name	▼▲	Customer	▼▲	Specifier	▼▲	Target Date	▼▲	Value	▼▲	Likelihood	▼▲	
Eastern Headquarters	✕	Apple		Design House One		12/12/2019		\$135,564		50%		View/Edit
<div><div>Quote Name</div><div>Value</div><div>Date</div><div>Status</div></div>												
SND00055123 - Boardroom	✓	\$94,245		2019-03-21 12:22:25		View / Edit / Delete		Live				
SND00054653-1 - Reception Area	✓	\$41,319		2019-02-12 16:25:25		View / Edit / Delete		Live				
SND00054653 - Reception Area	✓	\$65,854		2019-01-31 14:25:00		View / Edit / Delete		Live				
Western Headquarters	+	Apple		Design House One		02/12/2020		\$86,865		75%		View/Edit
Northern Headquarters	+	Apple		Design House One		05/31/2020		\$122,223		99%		View/Edit
Southern Headquarters	+	Apple		Design House One		06/10/2020		\$42,785		50%		View/Edit
Global Headquarters	+	Apple		Design House One		12/31/2019		\$251,996		75%		View/Edit

SPECIFIERS

Full Specifiers list available to all Reps within a Group

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ADD NEW SPECIFIER

Specifier Name ▼▲	Contact Name ▼▲	Email ▼▲	Country ▼▲	State ▼▲	
Design House One	Bob Smith	bob@designhouseone.com	USA	GA	View/Edit
American Office	Jenny Jones	bob@americanoffice.com	USA	FL	View/Edit
MM Squared	Marcia Mable	mm@mmsquared.com	USA	IL	View/Edit
Srong Dimension	Burt Strong	burt@strongdimension.com	USA	GA	View/Edit
Hospitality Heros	Ronny Johnson	ronny@hospitalityheroes.com	USA	AZ	View/Edit



Any Rep within a Group can create a Specifier

SPECIFIERS

ADD NEW SPECIFIER

Specifier Name*

Contact Name

Email Address

Country*

USA

State (USA only)*

-- PLEASE SELECT --

Address

Telephone

ADD SPECIFIER



View full Specifier details

PROJECTS

Rep Principals can see Projects from all Reps in their Group on this tab

Filter list by Customer or Specifier

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ADD NEW PROJECT

Expand all Collapse all

- Customer - - Specifier -

15 projects found

Project Name	Customer	Specifier	Target Date	Value	Likelihood	
Eastern Headquarters	Apple	Design House One	12/12/2019	\$135,564	50%	View/Edit
Hotel Number One	Hilton	American Office	02/12/2020	\$4,456	75%	View/Edit
Training Centre	McDonalds	MM Squared	05/31/2020	\$120,200	99%	View/Edit
Southern Headquarters	Apple	Design House One	06/10/2020	\$42,785	50%	View/Edit
Central Lobby	Grand Hyatt	Srong Dimension	12/31/2019	\$51,954	75%	View/Edit
East Dining Hall	Grand Hyatt	Srong Dimension	12/12/2019	\$105,564	50%	View/Edit
Western Headquarters	Apple	Design House One	02/12/2020	\$86,865	75%	View/Edit
Reception Refit	Marriott	Hospitality Heros	05/31/2020	\$77,223	99%	View/Edit
Suite Refurb	Westin	Hospitality Heros	06/10/2020	\$12,785	50%	View/Edit
Global Headquarters					75%	View/Edit
Eastern Headquarters					50%	View/Edit

PROJECTS

ADD NEW PROJECT

Project Name*

Customer*

-- Select --

[Add new customer](#)

Customer Contact

Specifier*

-- Select --

[Add new specifier](#)

Specifier Contact

Expected Date*

mm/dd/yyyy

Likelihood of becoming order
☒ 25% ☐ 50% ☐ 75% ☐ 99%

Project Status
☒ Live ☐ Ordered ☐ Lost

[SAVE NEW PROJECT](#) [CLEAR FORM](#)

Name the project

Assign to Customer

Select Customer Contact

Assign to Specifier

Select Specifier Contact

Select an Expected completion date (not visible on customer quote)

Select likelihood of order

Create a new Project

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ADD NEW PROJECT

Expand all | Collapse all

- Customer -

- Specifier -

15 projects found

Project Name	Customer	Specifier	Target Date	Value	Likelihood	
Eastern Headquarters	Apple	Design House One	12/12/2019	\$135,564	50%	View/Edit
<div>Quote NameValueDateStatus</div> <div>SND00055123 - Boardroom\$94,2452019-03-21 12:22:25View / Edit / DeleteLive</div> <div>SND00054653-1 - Reception Area\$41,3192019-02-12 16:25:25View / Edit / DeleteLive</div> <div>SND00054653 - Reception Area\$65,8542019-01-31 14:25:00View / Edit / DeleteLive</div>						
Hotel Number One	Hilton	American Office	02/12/2020	\$4,456	75%	View/Edit
Training Centre	McDonalds	MM Squared	05/31/2020	\$120,200	99%	View/Edit
Southern Headquarters	Apple	Design House One	06/10/2020	\$42,785	50%	View/Edit
Central Lobby	Grand Hyatt	Srong Dimension	12/31/2019	\$51,954	75%	View/Edit
East Dining Hall	Grand Hyatt	Srong Dimension	12/12/2019	\$105,564	50%	View/Edit
Western Headquarters	Apple	Design House One	02/12/2020	\$86,865	75%	View/Edit
Reception Refit	Marriott	Hospitality Heros	05/31/2020	\$77,223	99%	View/Edit
Suite Refurb	Westin	Hospitality Heros	06/10/2020	\$12,785	50%	View/Edit
Global Headquarters	Apple	Design House One	12/31/2019	\$251,996	75%	View/Edit
Eastern Headquarters	Hilton	American Office	12/12/2019	\$84,456	50%	View/Edit
Third Floor	Marriott	Hospitality Heros	02/12/2020	\$21,487	75%	View/Edit



Click to reveal quotes within the project

Previous versions ignored from full project value

Latest / preferred version of quote

Project value is combination of all preferred quotes within

CREATING QUOTES

Products added to basket as normal

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Item ID: ALTEA-2.0-EPX-GR1

 **Altea 2.8**
[Grade 1]

Frame Finish: Black
Seat Finish: Camira Gravity Tulip CPC25
Fully upholstered high back arm chair on column base.

2 \$2,080.00 \$4,160.00

Discount 50/10 \$2,288.00

Total \$8,307.00

RESET SORTING UPDATE CONTINUE SHOPPING CLEAR BASKET GET QUOTE



Get quote

Select type of quote to create
PROJECT QUOTE or QUICK QUOTE

PROJECT QUOTE

These are assigned to a Customer and a Project. All quotes (including previous versions) are saved within the project. Project quotes include full details of Customer, Specifier and Shipping address.

QUOTE DETAILS

PROJECT QUOTE QUICK QUOTE

Please assign your quote to a customer and a project. If you have not yet created your shipping fields to allow us to calculate delivery costs.

Quote name*

Customer* [Add new customer](#)

Project* [Add new project](#)

QUICK QUOTE

The quick quote function can be used when you do not yet know the full customer, project and specifier details. Simply name your quote and complete the shipping fields to allow us to calculate delivery costs.

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QUOTE DETAILS

PROJECT QUOTE

QUICK QUOTE

Please assign your quote to a customer and a project. If you have not yet created your customers or shipping fields to allow us to calculate delivery costs.

Quote name*

Customer*

Project*

SHIP TO ADDRESS

☐ Use same details as customer address?

Contact name

Company name

Country*

State*

Delivery address

Telephone Number

Rep Name*

Rep Phone Number

GENERATE QUOTE

CLEAR FORM



A lot of the information on a Project Quote is carried through from the Customer and Project settings

Name the quote

Assign to Customer

Assign to Project

The customer address can be populated into the shipping fields if required

Fill in full shipping details including State to calculate shipping costs



View final quote

FINAL PROJECT QUOTE

Final quote retains familiar layout Addition of Customer and Shipping details



QUOTATION

Name of Project: Altea project
Quote No: SND00055940

CUSTOMER ADDRESS
Alex Testing
Alex's Testing Corp.
123 Test Street
Test County
Delaware
DELAWARE (DE), USA
123456789

SHIP TO ADDRESS
Alex Testing
Alex's Testing Corp.
123 Test Street
Test County
Delaware
DELAWARE (DE), USA
123456789

SANDLERSEATING
Sandler Seating Inc.
1201 Peachtree Street NE,
Suite 1625
Atlanta, GA 30361
USA
Tel: 404 982 9000
Fax: 404 321 7882
Date: 07 June 2019

IMAGE	PRODUCT	DESCRIPTION	QTY	LIST PRICE	DISCOUNT	NET PRICE	TOTAL PRICE
	Altea 2.3 [Grade 1] <small>Item ID: ALTEA-2.3-CHR-GR1</small>	Frame Finish: Polished Chrome Seat Finish: Camira X2 Multiply AK014 Arm chair on swivel base with chrome frame. Fully upholstered in Sandler Grade 1 Fabric	10	\$1,900.00	50/10	\$855.00	\$8,550.00
	Altea 2.1 [Grade 1] <small>Item ID: ALTEA-2.1-CHR-GR1</small>	Frame Finish: Polished Chrome Seat Finish: Camira X2 Multiply AK014 Arm chair on sled base with chrome frame. Fully upholstered in Sandler Grade 1 Fabric	10	\$1,600.00	50/10	\$720.00	\$7,200.00
Sub Total							\$15,750.00
Freight Charges							\$974.00
Total							\$16,724.00

ADDITIONAL INFORMATION
Rep Name: Mark Ashmore
Rep Phone Number: 7887996083

Standard lead-time is 8-10 weeks upon receipt of deposit and upholstery (or COM) fabric.
Inclass Collection requires 10-12 weeks.

Specifier: Alex's Test Specifier
Specifier Location: ARIZONA

PRICES VALID FOR:
30 Days from above date
BY: Online Quotation

TERMS

CREATE PDF CREATE DOC DOWNLOAD HTML SAVE QUOTE

Specifier assigned to Project

CREATING QUICK QUOTES

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QUOTE DETAILS

PROJECT QUOTE QUICK QUOTE

The quick quote function can be used when you do not yet know the full customer, project and spec details are known. Simply name your quote and complete the shipping fields to allow us to calculate

Quote name*

Specifier name

Contact name

Company name

Country*

State*

Delivery address

Telephone Number

Rep Name*

Rep Phone Number

GENERATE QUOTE

CLEAR FORM



Quick quotes only need minimal information to allow for a shipping cost to be calculated.

Name the quote

Optional text field for recording Specifier

Select country and state



View final quote

FINAL QUICK QUOTE

Final quote retains familiar layout

Quick Quotes just include Shipping details

QUOTATION

Name of Project: Altea test
Quote No: SND00055940



SANDLERSEATING

Sandler Seating Inc.
1201 Peachtree Street NE,
Suite 1625
Atlanta, GA 30361
USA
Tel: 404 982 9000
Fax: 404 321 7882

Date: 07 June 2019

SHIP TO ADDRESS

Company HQ
Streetname
Anytown
GEORGIA (GA), USA
45678913

IMAGE	PRODUCT	DESCRIPTION	QTY	LIST PRICE	DISCOUNT	NET PRICE	TOTAL PRICE
	Altea 2.3 [Grade 1] <small>Item ID: ALTEA-2.3-CHR-GR1</small>	Frame Finish: Polished Chrome Seat Finish: Camira X2 Multiply AK014 Arm chair on swivel base with chrome frame. Fully upholstered in Sandler Grade 1 Fabric	10	\$1,900.00	50/10	\$855.00	\$8,550.00
	Altea 2.1 [Grade 1] <small>Item ID: ALTEA-2.1-CHR-GR1</small>	Frame Finish: Polished Chrome Seat Finish: Camira X2 Multiply AK014 Arm chair on sled base with chrome frame. Fully upholstered in Sandler Grade 1 Fabric	10	\$1,600.00	50/10	\$720.00	\$7,200.00
Sub Total							\$15,750.00
Freight Charges							\$835.00
Total							\$16,585.00

ADDITIONAL INFORMATION

Rep Name: Mark Ashmore
Rep Phone Number: 7887996083

Specifier: Test Specifier

PRICES VALID FOR:

30 Days from above date
BY: Online Quotation

Standard lead-time is 8-10 weeks upon receipt of deposit and upholstery (or COM) fabric.
Inclass Collection requires 10-12 weeks.

Specifier names on quick quote

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SAVED QUOTES LIST

Quick Quotes and Project Quotes appear on the Saved Quotes list

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Order number / name

- Select Year -

SEARCH

158 quotes

Hide alternative versions

- Customer -

- Status -

Quote	Customer	Project	Value	Date		Status
SND00055940 - Altea test	Customer Name	Project Name	\$16,724.00	S: 2019-06-07 17:32:13	View / Edit / Reassign	Live
SND00055877 - tertert			\$2,490.00	S: 2019-06-06 09:16:20	View / Edit / Reassign	Lost
SND00055875-1 - xonfsf	✓ Customer Name	Project Name	\$7,770.00	S: 2019-06-06 09:08:31	View / Edit / Reassign	Live
- SND00055875 - xonfsf	✓ Customer Name	Project Name	\$7,768.00	S: 2019-06-06 09:04:20	View / Edit / Reassign	Live
SND00055833 - v-stack test			\$45,943.20	S: 2019-06-05 06:28:13	View / Edit / Reassign	Live
SND00055688 - Test GSA halving			\$40,543.00	S: 2019-05-31 11:26:36	View / Edit / Reassign	Live



Reassign

Quick Quotes can be converted to Project quotes by reassigning them to a Project



Once assigned to a Project, the quote will include all Customer and Specifier details that are included within teh project

REASSIGN QUOTE: SND00058590

Quote name*

Customer*

-- Select a customer --

Add new customer

Project*

-- Select a project --

Add new project

Rep Name*

Mark Ashmore

Rep Phone Number

7887996083

REASSIGN QUOTE

CLEAR FORM

Assign quote to Customer and Project