

Quaker CRM

Login

Website - <https://quakerportal.force.com/QuakerCRM/s/>

Userid –

Password –

Overview

Home:

- Shows recent opportunities, quotes and projects.
- See today's tasks
- Dashboard Access

Accounts:

- Search for specific accounts and see opportunities related to them specifically.

Projects:

- Place where all incoming projects will get logged either via a request from a customer or sales rep or from Dodge.

Opportunities:

- Create an opportunity for a specific project. A specific account will be selected when at the opportunity level.

Opportunity Stage Management:

Project Review – In this stage you are reviewing project details and specifications and determining if we are going to bid and if we bid what product.

Quote Creation – In this stage a Q1 quote is being produced.

Quote Management – In this stage the initial quote has been submitted to the customer. Any quote modifications or new versions will happen in this stage. An opportunity will stay in this stage until we get a verbal commitment or learn that we will not be landing this job.

Verbal Commitment – This is the stage between getting the verbal commitment and a PO.

Closed – An opportunity can be either closed won or closed lost. If we lose an opportunity we want to mark as closed lost. When we receive a PO it can be marked as closed won.

Project Stage Management:

Bidding – A project will default to the bidding stage until a PO is received.

PO Received – When an opportunity is marked closed won a project will move to the PO received stage. In this stage shop drawings are submitted, samples approved, and kick off meetings scheduled.

Final Approvals – Signed shops received, credit review and approval, lock in production schedule, and finalize delivery schedule.

Ready for Manufacturing – All documents are signed off. Orders are placed and ready for purchasing and manufacturing processes. This is the final stage.

A project will show that work is still to be done until it is moved to the ready for manufacturing stage.

Flow

Order of Events:

1. Create Project
2. Create Opportunity for a specific account
3. Create a Q1 quote

In order to have a quote you must have an opportunity associated to an account and in order to have an opportunity you must have a project.

Add New Project:

Before adding a new project always search projects to ensure it doesn't already exist.

Click on Sales on top ribbon bar, then select Projects

New

Add project information

New Project: Project - Open

Project Address			
* Project Name	<input type="text" value="Test Project"/>	* Address	<input type="text" value="101 First Street"/>
* City	<input type="text" value="Dallas"/>	* State	<input type="text" value="TX"/>
* Zip	<input type="text" value="75001"/>	Country	<input type="text" value="United States"/>

Project Details			
* Building Type	<input type="text" value="Business - Multi-Use/Office/Commerc..."/>	* Project Stage	<input type="text" value="Bidding"/>
# of Floors	<input type="text" value="3"/>	DP Rating	<input type="text" value="50"/>
Project Type	<input type="text" value="--None--"/>	Water Rating	<input type="text" value="10"/>
Basis of Design	<input type="text" value="--None--"/>	STC Rating	<input type="text" value="--None--"/>
Status	<input type="text"/>	OITC Rating	<input type="text" value="--None--"/>
Quaker Bid Date	<input type="text" value="3/13/2020"/>	ADA Compatible	<input type="checkbox"/>
Projected Start Delivery Date	<input type="text" value="6/12/2020"/>	Major Hotel Brand	<input type="text" value="--None--"/>
		Requires Dealer Approval	<input type="checkbox"/>

Dodge Related Information	
Dodge Project	<input type="text" value="Search Dodge Projects..."/>
Market Segment	<input type="text"/>

Save

Add New Opportunity and Quote:

While in the project click the Related tab, then click New Opportunity

On the opportunity pop up screen you will choose the following

- Account you will be bidding to
- Estimated opportunity amount
- Close Date (Date a decision will be made on who is awarded project, or the date to do a follow up)

New Opportunity

* Account Name G2 ARCHITECTUAL PRODUCTS LLC	Opportunity Owner Nick Berhorst
Project Test Project	* Close Date 4/27/2020
* Opportunity Name Test Project	* Stage Project Review
* Amount \$125,000.00	Probability (%)
Glazer Input & Opportunity Notes	Architect Input & Expectations
Competition	
Available	Chosen
All Weather	
Alside	
Andersen	
Atrium	
Cascade	

Cancel Save

Save

Click on opportunity name on related tab of project.

You are now in the opportunity.

Gather quote requirements and update opportunity or project data as received.

Once ready for quoting change state to Quote Creation

* Account Name SIERRA GLASS COMPANY	Opportunity Owner Deriek Braun
* Project OB#0343852 - THE HAVEN AT MARKET PLACE	* Close Date 6/30/2020
* Opportunity Name OB#0343852 - THE HAVEN AT MARKET PLACE	* Stage Project Review
* Amount \$108,841.10	Probability (%) 0%

Additional Information

Click Create Quote

You are now seeing Q1 inside Quaker CRM, quote as you typically would.

Once finished with the quote select print and the actual dollar amount will be updated on the opportunity to

Click Go To Opportunity to exit quote and land back on the opportunity

Adding Dealer Contacts To an Opportunity

Go to the account the contact works for. Click New contact and fill in the necessary fields and save.

The screenshot shows the Quaker CRM interface. At the top, there is a navigation bar with the Quaker logo and menu items: Home, Dodge PipeLine, Dodge Companies, Accounts, Projects, Opportunities, Q1 Quotes, Reports, Dashboards, and Forecas. A search bar is located on the right. Below the navigation bar, the account details for 'SOFTER LITE WINDOW CO.' are displayed, including the phone number 773-774-6400, billing address (5800 N. NORTHWEST HWY, CHICAGO, ILLINOIS 60631, United States), and account owner Rich Kuras. A message states: 'We found no potential duplicates of this account.' Below this, the 'Contacts' tab is active, showing one related contact: Mark Kane, with roles, title, and email (markkane@softerlite.com) listed. Buttons for 'New Contact' and 'Add Relationship' are visible.

On the Opportunity

The screenshot shows the Quaker CRM interface for an opportunity. The opportunity name is '6840 N. Sacramento'. Below the name, the account name is 'SOFTER LITE WINDOW CO.', the close date is '5/22/2020', and the amount is '\$493,673.26'. The opportunity owner is 'Andre Struempfl'. A progress bar shows the stages: 'Quote Creation' (completed), 'Quote Management', and 'Verbal Commit'. Below the progress bar, the 'Contacts' tab is active, showing 'Contact Roles (0)'. Buttons for 'Add Contact Roles' and 'Edit Contact Roles' are visible.

Add quotes that are not project related:

Use the project named Unassigned Projects. This will allow you to consistently enter quotes through Salesforce, but will not incorrectly curve close rates. This will also save setup time. Freight on these quotes will use the dealer location.

Project Unassigned Project

Address: 504 US Highway 63, City: Freeburg, State: MO, Zip: 65035, Building Type: Replacement, # of Floors: 1

Details | Tasks | Documents

Project Address

Project Name	Unassigned Project	Address	504 US Highway 63
City	Freeburg	State	MO
Zip	65035	Country	United States

Project Details

Market/Project Type	Commercial	Project Stage	Bidding
Building Type	Replacement	DP Rating	2D
Project Type	Replacement	Water Rating	0
# of Floors	1	STC Rating	
Quaker Bid Date		OTC Rating	
Projected Start Delivery Date	3/2/2040	ADA Compatible	<input type="checkbox"/>
Basis of Design		Major Hotel Brand	
Protected Project	<input type="checkbox"/>		

Opportunities (3-)

- Allison**
Account Name: MILLER GLASS OF ROLLA, LLC
Stage: Quote Management
Amount: \$5,066.82
- Jackson Glass**
Account Name: IMPERIAL MFG
Stage: Quote Management
Amount: \$336.41
- Priscilla Standish Apts.**
Account Name: DORGLASS INC
Stage: Quote Management
Amount: \$637.98

Activity | Chatter

New Task | New Event | Log a Call | Email

Create a task... **Add**

Keystone Protection:

This operates the same as keystone protections previously did in Jobdata. If you enter a project in a protected keystone accounts territory and are not quoting to the keystone account, you will receive the message in grey below when moving to a new stage.

Opportunity Project 80921

You encountered some errors when trying to save this record. Approval is required to move to the next stage. Please submit for approval by selecting the Submit for Approval button on the Opportunity record.

Account Name: ARCHITECTURAL PRODUCTS LLC, Close Date: 6/5/2020, Amount: \$75,000.00, Opportunity Owner: Nick Berhorst

Details | Tasks | Contacts | Quaker Team | Documents | Approval History

Account Name	G2 ARCHITECTURAL PRODUCTS LLC	Opportunity Owner	Nick Berhorst
Project	Project 80921	Close Date	6/5/2020
Opportunity Name	Project 80921	Stage	Project Review
Amount	\$75,000.00	Probability (%)	10%

Opportunity Analysis

Glazer Input & Opportunity Notes | Architect Input & Expectations

Additional Information

Competition | Loss Reason

System Information

Created By: Nick Berhorst, 4/14/2020 6:23 AM | Last Modified By: Nick Berhorst, 4/14/2020 6:23 AM

Q1 Quotes (0)

Activity | Chatter

New Task | New Event | Log a Call | Email

Create a task... **Add**

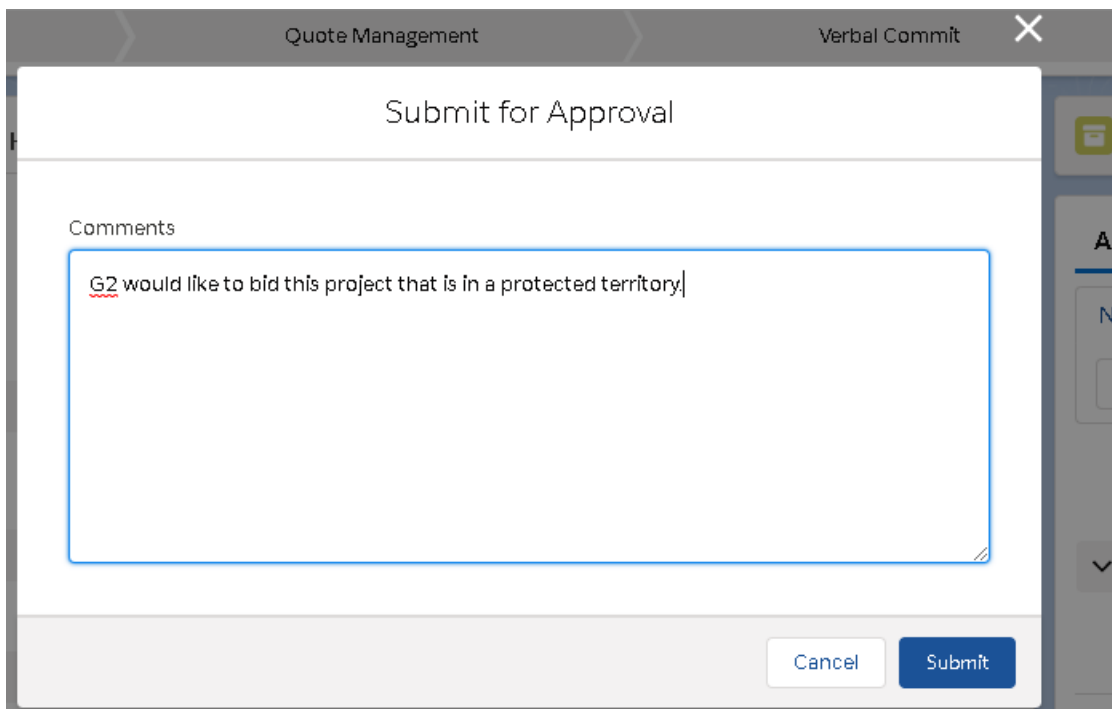
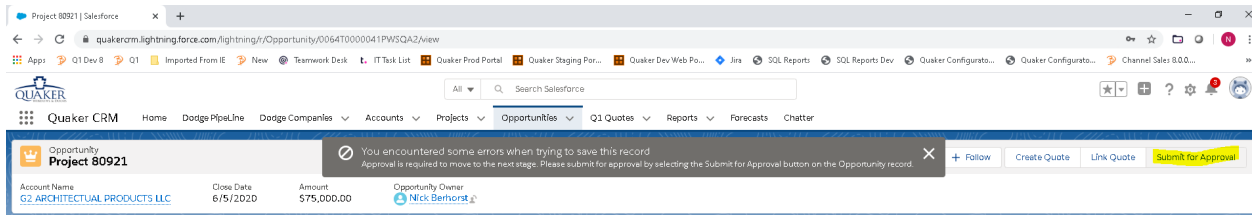
Filters: All time • All activities • All types

Upcoming & Overdue

No next steps
To get things moving, add a task or set up a meeting

No past activity. Past meetings and tasks marked as done show up here.


In order to move forward you will need to submit for approval.




Once approval has been granted or denied you will get a notification email.

Attaching Documents:


- On the Project or opportunity go to the related tab.
- Go to files and click upload files

 Approval History (0)

 Contact Roles (0)

Add Contact Roles

Edit Contact Roles

 Q1 Quotes (2)

Quote Name	Quote ID	Primary Quote	Status
COMCAST RICHMOND	SQKIE000005_1	<input checked="" type="checkbox"/>	Closed - Lost 
COMCAST RICHMOND/...	SQKIE000005_2	<input type="checkbox"/>	Closed - Lost 

[View All](#)

 Files (0)

Add Files

 Upload Files

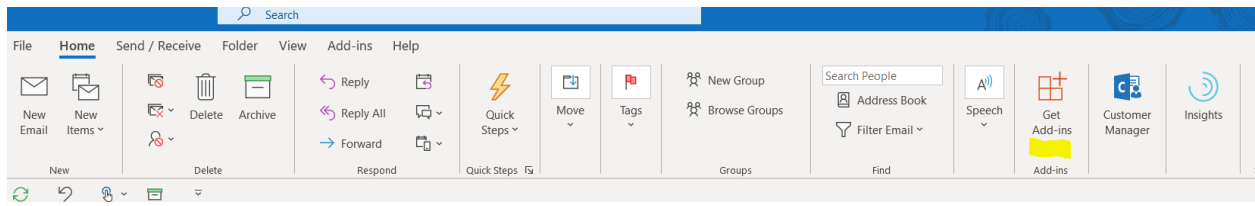
Or drop files

Mobile App:

- Download Salesforce from the mobile app store
- click use custom domain
- type in (case sensitive) quakerportal.force.com/QuakerCRM
- username (your email)
- password

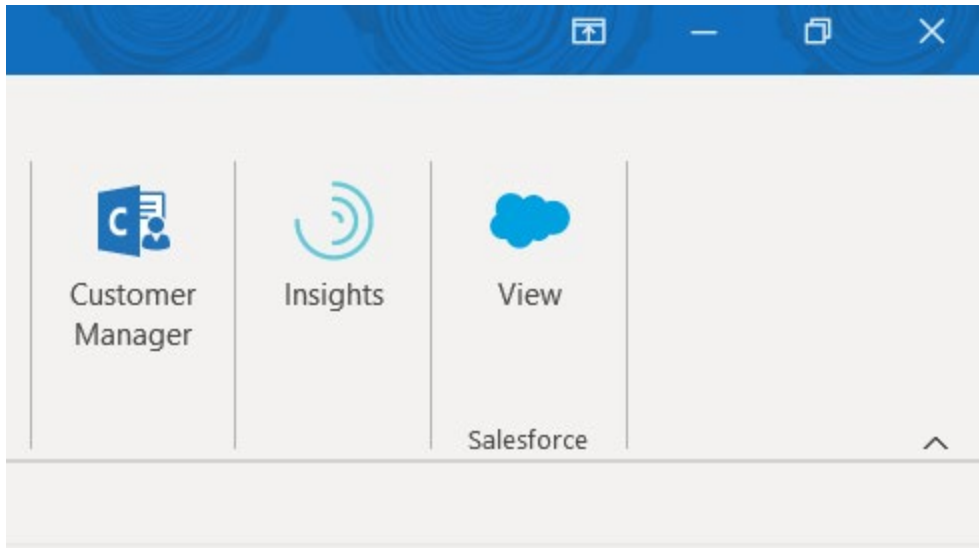
Email App:

Click Get Add-ins



Search for Salesforce

Add



Salesforce



+ Search



Related

Tasks

Log Email

People (1)

 Tim Wier  (2)

