LennoxPROs.com | Sales Tools Checklist

All the sales tools you need to WIN in your market. All in one place.

Get started on the Lead and Customer Management Dashboard and Proposal Builde easy-to-use. With so many handy options and time-saving functionalities, you can manage sales leads, build professional looking proposals, or setup your company profile, and so much more — all in one amazing tool.

Access	
☐	All admins in your company have access to proposal tool settings. If you are unable to access settings, simply ask your company Administrator to login to their account and click on Admin → search for your name →enable 1901 for tool admin access
☐	To access the tools simply go to Menu →Resources → Sales Tools → Lead and Customer Management or Proposal Builder
Setting up your Company	
☐	**Settings →My Company Setup** Setup your company name, address, tagline, logo and other details.
☐	**Settings →Terms & Conditions** Modify the 'Terms & Conditions' applicable for all proposals in your company.
☐	**Settings →Customize Lead Generator and Store Locator** Want to track your best lead generators/sales persons at different store locations? Add their information here to track during lead creation.
Setting up your Pricing	
☐	**Settings → Pricing → Gross Margins** Name your tiers and set your desired gross margin for each tier.
☐	**Settings → Pricing → Project Costs** Enter the desired percentage for each category under project costs which includes Variable Costs, Labor, Permit Rates, Misc. Costs and Optional Discount Tiers
☐	**Settings → Product Family Descriptions and Pricing Overrides→ Pricing Overrides** Want to override your default pricing? Simply search by catalog number and enter the new price here.
☐	**Settings → Consumer Financing** Select Service Finance or SNAP if you are part of those programs. Otherwise, you can also setup your financing option manually.
Setting up Rebates	
☐	**Settings → Rebates →Custom Rebates** Create instant and after sales rebates.
Setting up your Products & Services	
☐	**Settings → Manage Accessories and T-stats** Add and save default thermostats and accessories that can be added to your proposal.
☐	**Settings → Product Family Descriptions and Pricing Overrides → Product Descriptions** By default all products are selected. De-select products that you do not want listed in your offerings.
☐	**Settings→ Custom Products and Services** Create and save custom products and services that can be added to your proposal. Ensure

	you select “Services” under Type for search for custom services.
Lead and Customer Management	
☐	**Dashboard → Add Lead** To add a new lead, click on the ‘Add Lead’ button on the dashboard or Leads Table.
☐	**Dashboard → Add Lead → Template→ Choose File** To import your leads, download the excel template and input mandatory fields.
CAP Benefit: Opt in to receive leads	
☐	**Admin → Manage Leads Opt in** To opt in to receiving leads simply select at least one user in your company and opt in.
☐	Admin To receive proposal tool notifications, simply select a user and opt in to receive proposal tool sms option.

Contact us at 877-570-0123 or feedback@lennoxpros.com if you have questions. To log a defect, simply log into your LennoxPROs.com account and going to Help → Open a Support Ticket.