

BUZ Manage Quote Follow ups



Manage Follow ups

Better Manage your pending quotes/follow ups and improve your customer service

Its hard enough remembering personal appointments, your children's appointments, writing down the dates and times why not make it easier for yourself by using our quote follow up feature!

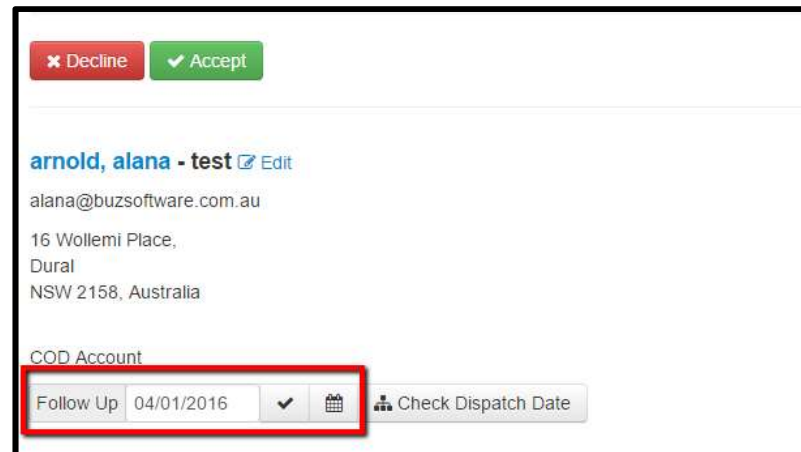
BUZ allows you to manage your pending quotes by creating “follow up” appointments In your calendar so that you are reminded you need to follow up with the customer on this day/time.

Manage Follow ups

Once a quote is created you have the ability to Accept or Decline this quote, but what if the quote is pending and requires a follow up?

To create a follow up

1. Select the date you would like to set your follow up appointment for
2. If you change the date from what is already existing click the tick (✓) to confirm the new follow up date

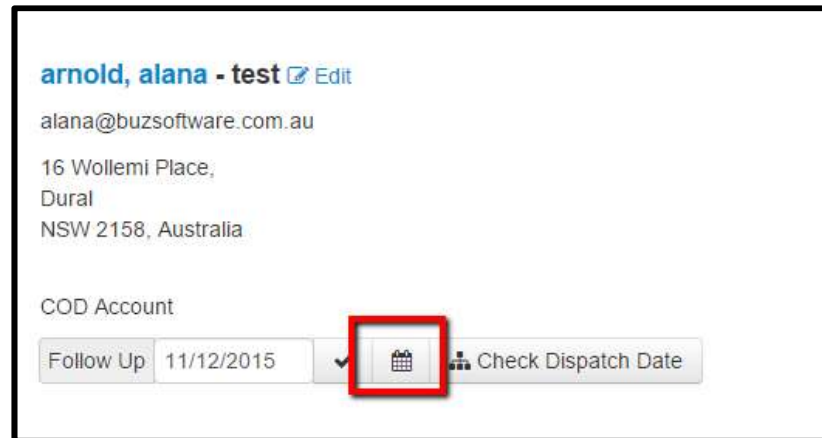
A screenshot of a software interface for managing quotes. At the top, there are two buttons: a red "Decline" button with a white 'x' icon and a green "Accept" button with a white checkmark icon. Below these is a horizontal line. Underneath the line, the name "arnold, alana - test" is displayed in blue, followed by a small blue "Edit" icon. Below the name is the email address "alana@buzsoftware.com.au" and the address "16 Wollemi Place, Dural, NSW 2158, Australia". Below the address is the text "COD Account". At the bottom, there is a "Follow Up" section with a date field containing "04/01/2016", a checkmark icon, a calendar icon, and a "Check Dispatch Date" button. A red rectangular box highlights the date field, the checkmark icon, and the calendar icon.

If successful you will receive a pop up message as per below

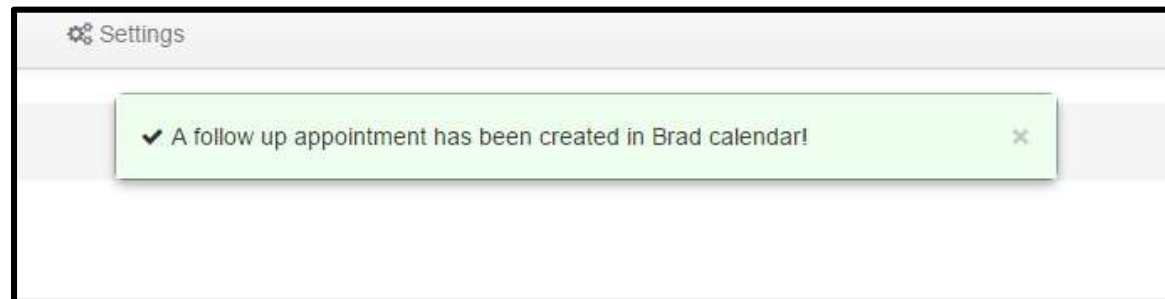


Manage Follow ups

3. Once the date has been confirmed, click the calendar to add the follow up appointment to your calendar



If successful you will receive a pop up message as per below "A follow up appointment has been created)



Manage Follow ups

Your follow up appointment will be added to your calendar as per below

Leads

[+ New Lead](#) [New Private Appointment - Lead](#) [New Private Appointment - Installation](#)

Sales Representatives

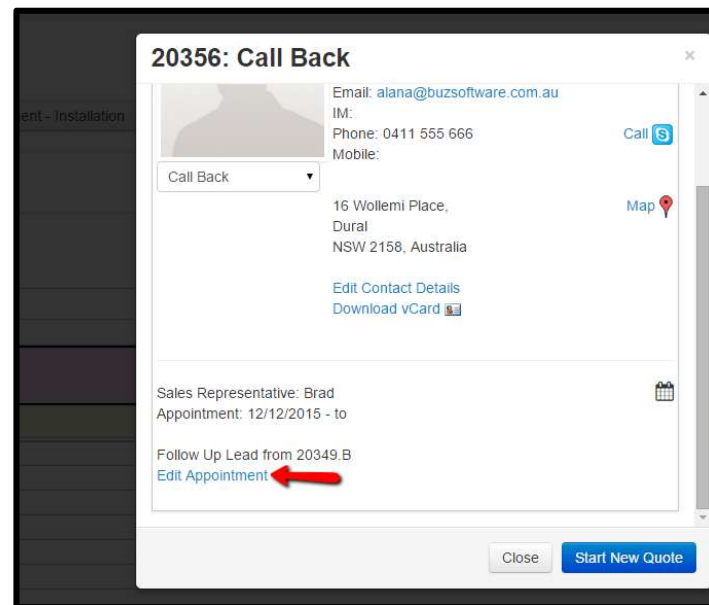
- Adam
- Anne
- Bill
- Brad
- Bruce
- Cindy
- Dale
- Jade
- Jess

Today 12 December 2015

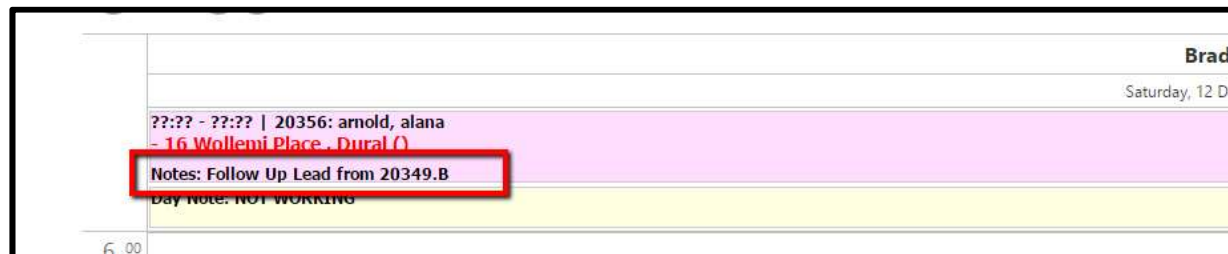
Brad	
Saturday, 12 December	
6:00	???? - ????: 20356: arnold, alana - 16 Wollemi Place , Dural () Notes: Follow Up Lead from 20349.B Day Note: NOT WORKING

Manage Follow ups

Once added you can edit your appointment to allocate the correct times and add any notes if needed. This is done like any other lead, open the lead and edit appointment

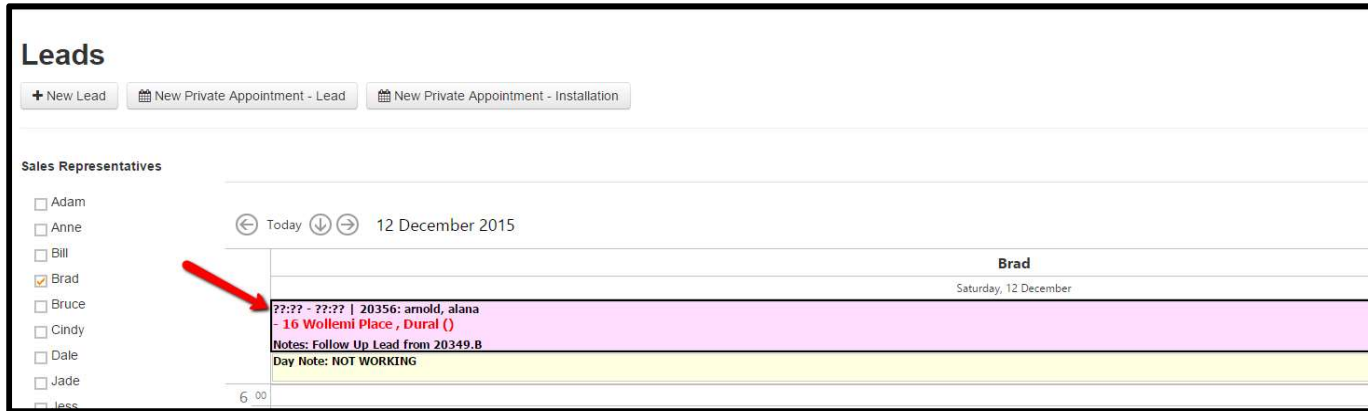


The notes are automatically set to "Follow up lead from 22222.A"



Manage Follow ups

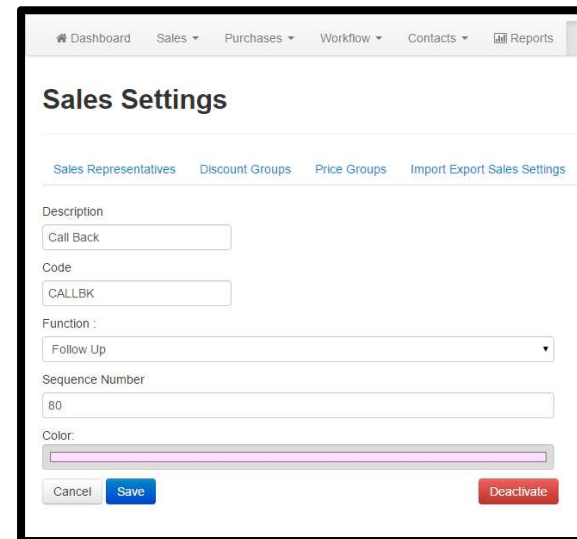
In this example the follow up appointment appears in pink and is set to “Call back” but this can be edited in settings (lead statuses) where you can edit the colours and status description



Editing follow up status

Settings-> Sales Settings-> Lead status

Note the function must be set to “Follow up”

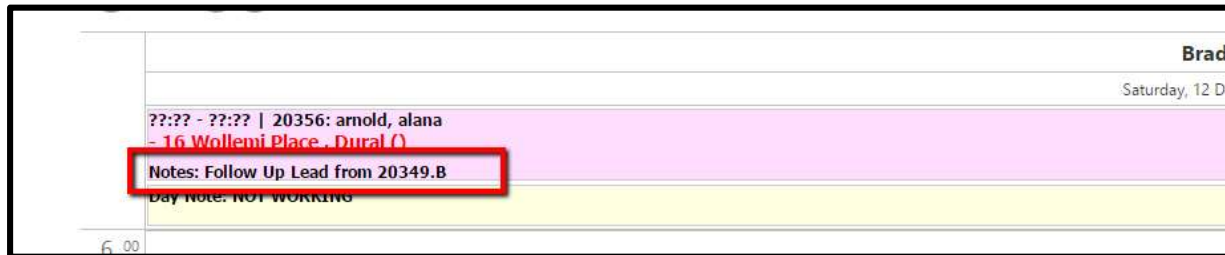


Manage Follow ups

Accepting the pending quote

If and when the customer wants to go ahead, you will need to accept the original order.

If you create a new quote from the follow up appointment your reporting will be skewed (Due to conversions being in accurate as the follow up appointment is not an actual hard lead)



Accept/Edit the original quote which is shown in notes for your reference.

If you cant find what your looking for in the help documentation let us know!

We will point you in the right direction or get something added to the documentation for you.

Email: support@busoftware.com.au



A background image of a sunset or sunrise with a warm orange and yellow sky and white clouds at the bottom.

Thank you

Any further questions please contact us at
support@buzsoftware.com.au