



1. To make sure the homeowner is involved in the creation of their comfort system, **have them sit next to you as you work.**
2. **Open laptop bag** - (Look for a location near an outlet, on a table, and relatively free of glare.)
3. **Turn on Printer** - (Be sure to do this before starting up the laptop.)
4. **Turn on Laptop** - (is printer on?)
5. **Start up Opportunity Manager** - (Double click the icon on the desktop.)
6. **Make Browser “full screen”** - (Push F11 key on the top row of the keyboard.)
7. **Open page** - move the cursor over **Start Proposal**, then click on **Retrofit**.
8. **Homeowner Search page** – choose **step (a.) to add a customer** or **step (b.) to search for an existing customer**:
 - a. **Add a New Customer** – click on **Add New** and input the customer’s information. Boxes marked by a red asterisk must be filled in, but others are not necessary.
 - b. **Search for an existing customer** - select the category by which you wish to search, enter the customer’s information under the appropriate field, then click **Search**. (Entries don’t have to be complete in order to retrieve customers, but the more specific you can be, the more specific your results will be.) Select the customer’s entry under the Home Owner Search Results list. To view any previous proposals, click on the **number** to the left of the **CNP** (Create New Proposal) link. This leads to the Proposal Search Results screen, where you can select from a list of previously created proposals, and from there, view, modify, or delete them. Otherwise, click on the **Customer ID Number** or **CNP** (Create New Proposal) links. This will take you to the Proposal Setup page where you begin setting up the proposal details.
9. **Proposal Setup page**:
 1. Verify/edit customer details
 2. **Select Comm No** from the dropdown box. The letters represent different gross profit margins and commission rates, and should be preset by your manager.
 3. **Select Sales Person Name**: click on the dropdown box and select your name. Your name should have been pre-entered by your manager, as well as assigning you a **Sales Person ID** number. The number should change automatically whenever the name is changed.
 4. In the right column, you will see 11 links: **Add/Edit System, Comfort Builder, Import Load Calc, Load Calc, Load Calc Summary, Existing System Sheet, Quick Product Selection, Wheel, Cyber Showroom, Comfort Concerns, and Confirm Selection**.
 - a. The **Add/Edit System** link allows you to change the system name to something other than the default, “SYSTEM1”. This link is optional.
 - b. The **Comfort Builder** link is the starting point for developing a system for your customer, and accordingly, we’ll look at it in greater depth further down the page. To navigate through the Comfort Builder series, simply click on the **Next** link when





you're finished with each individual page.

- c. The **Import Load Calc** link allows you to import a load that you've done on the Comfort Optimizer hand held load calc software.
- d. The **Load Calc** link allows you to run a load for your customer's house.
- e. The **Load Calc Summary** allows you to view the results of a load that you've previously imported. If this load was run on Comfort Optimizer, do not attempt to make any changes or serious errors could result.
- f. The **Existing Systems** link will allow you to enter site conditions for a.
- g. The **Quick Product Selection** link is where you select the components - scenarios used to comprise a system. It's an abbreviated form of the Comfort Builder series, and accordingly, is discussed there in more depth at 10 g. **Please note:** if you want to bypass an in-depth sales presentation and simply select products directly, click on this link. Otherwise, go through the Comfort Builder series.
- h. The **Wheel** and the **Cyber Showroom** allow your customers to get information about you, your company, and some of the products you offer.
- i. Finally, **Comfort Concerns** allows you to get a little more information about your customer's needs and goals for their system. Comfort Concerns is actually the first page in the Comfort Builder series of pages, although this independent link is provided so that you can record the information without needing to proceed directly to the system selection.

10. Comfort Builder series –

- a. The **Comfort Concerns** page is the first page in the Comfort Builder series. It provides an opportunity for you find out what the customer considers important in a system. This section has 15 questions for you to ask them, and a priority rating regarding how important they feel each question to be. Space is provided for you to include any additional notes that you feel may be helpful in addressing their concerns. Your manager will select some possible solutions based on these answers, which will then be available through the **Solutions** links at the right of the page.
- b. **Company Resume** gives your customer an opportunity to learn a little more about your company, and why you are their best choice for their business.
- c. **Installation Value** takes the customer through some common problems that plague poorly installed systems, and how a more efficient system will benefit them.
- d. **Quality Control Audit** lets you show your customer the value of making sure the work is done correctly.
- e. **Installation Packages** shows your customer the comprehensiveness of your company and its installation process.





- f. **Peace of Mind** lets you provide your customer with some visual information about other systems which may be helpful when choosing their package.
- g. The **Product Selection** pages are the pages on which you actually determine which components will comprise the customer's system. Later screens offer opportunities to change the quantities of parts already selected, or to go back to earlier pages to include a part you may have forgotten to add. Product Selection consists of 10 major categories: **Equipment Selection, Other Equipment, Equipment Accessories, Gas Appliances, Add-ons Selection, Additional Components, Venting, Duct Work, Miscellaneous,** and **Labor Matrix**. To navigate through these pages, click on **Next** whenever you've made all your selections from a given page.
 - i. To select a component, click on its link (sub-category) on the far left-hand side. The available types of that component will appear on the right. Sometimes, there will be two or three selection criteria you'll have to navigate in order to find individual parts.
 - ii. Individual models - parts will appear along the right-hand side, with a description next to them. To select one of these models - parts, click on them. The models - parts will then appear in the drop-down menus next to the initial links. If you select more than one model - part in a major sub-category (Trane Furnaces, for example), you can view them all by clicking on the drop-down menu – although selecting something from the drop-down menu has no effect.
- h. On the **Inclusions** page, you are provided with a list of inclusions that you can select to add to the system. You may select up to 28 from the list.
- i. Likewise, the **Exclusions** page allows you to select 13 exclusions to the system.
- j. On the **Confirm Selection** page, you'll be presented with an overview of the system as you've selected it so far. To change the quantities of the items you've selected, click on the appropriate Quantity field and alter its number, then click save. If you wish to delete an item, or make it optional, click the appropriate checkbox and then click save. To go back to the **Product Selection** pages, click on the Equipment drop-down menu and select the category under which the missing items lie. (After you go back to the appropriate page, use the **Confirm Selection** button to return to the Confirm Selection page. If you need to add products from more than one category, first go to the earliest category and work your way forward.) When finished, click the **Save** link.
- k. The Save link will take you to a second **Confirm Selection** page, which will allow you to include photos of some of the products you're selling to your customer. At the bottom of the page, select one or two of the items in the customer's system under the Item Photo 1 and Item Photo 2 drop-down menus. This done, click the **Proposal Preview** link.
- l. The **Existing Systems** page of the Proposal Preview series shows you the pictures you selected on the previous page. Clicking the **Proposal Preview** button will take you to the first page of the three-page **Proposal Summary Preview** page which will include a list of all of the products you're selling and will also give you a chance to include some installation





- instructions for the installers (“Don’t let the cat out,” for example). Click the **Next** button again, and you’ll be taken to the pricing page, which will provide subtotals, sales tax, down-payment, and finance information. Clicking **Next** one final time will display the proposal preview. This has a field in which you can type any explanations or information not contained on the previous pages. At the bottom of this page, you will find a **Save & Print** link. **Please note:** in order to return to this proposal later, the Save & Print link must be clicked. Exiting the program before this is done will result in the proposal not being saved in memory, and a value of all zeroes being assigned to it. It’s always possible to return to the proposal later and modify it, but if it’s not saved on this screen, there will be nothing to return to.
- m. Finally, we come to the **Proposal**. Again, the proposal appears in three separate pages. Once you click through to the final page, you’ll find a **Print Proposal** link which will consolidate all three proposal pages into a single page, and open it in a new window. Click this link, and then click on the **Print** link in the new window.
11. **Don’t close the program** until you’re ready to walk out the door. If the customer decides they want a slightly different proposal, it will save you some time.
12. **Synchronize** daily, at the office.
- Connect your network cable
 - Start your laptop
 - Open Opportunity Manager
 - Under the Administration tab, select **Synchronize**.
 - Click on each of the 8 links, one at a time, until you’ve synchronized all of them. If synchronization is successful, you’ll see a message letting you know that you’ve succeeded, and that you can move on to the next synchronize link. But if there’s been a problem – for example, if you or your manager’s computer has been disconnected from the network – you’ll see a “The page cannot be displayed” message. Either way, hit the back button on your browser to return to the main **Synchronize** page.

