2017

Event Tone Wireless

Making Wireless Easy

Account Executive Training Manual

Welcome Aboard!

On behalf of all of us at EventTone Wireless, I'd like to say "thank you" for joining us. We pride ourselves in hiring great people who are committed to growing our company while improving their own lives. We all appreciate your participation.

The following manual was designed to serve two purposes. The first is to introduce you the Account Executive position. The first place you will start is with our rental sales. At EventTone Wireless we're fond of saying "as rentals go, so goes the company." That means your position, and your success in that position, has a direct effect on the growth and success of our company. Rest assured we're here to work with you in any way to help you succeed, grow, benefit and reach both your and our company's goals.

To help you learn about this position, a large part of this manual is instructive. It includes explanations of the services we offer, the equipment we rent, the paperwork we generate, the CRM management system we use and more. We have tried to be as clear and descriptive as possible, but we know you'll have questions. As you review this material, know we are here to answer any questions you may have and to provide clarity where you are unsure.

The second part of this manual is designed as a "day to day" primer on how to do your job. It includes everything from phone & email scripts to instructions on how to fill and deliver orders.

This manual is meant to be used as a reference during your entire time here at EventTone. Keep it handy. Refer to it often. It was designed to be used.

Also, as with most training and operations manuals, it is a living document. As our company grows and you grow in your position, this text will need supplementation. If there is additional information you feel we should include, please feel free to let us know. We want your input.

Thanks again. We hope you find your new position challenging and enjoyable. We look forward to working with you.

Job Description: Business Development Executive

Reports To:

Principal/Partner

Primary Objective:

The Business Development Executive is accountable for gaining new business in line with the company's growth strategy. The role also provides the crucial link between new and established clients to ensure a smooth relationship between all current and future business contacts.

Key Responsibilities

- Sell the benefits of EventTone Wireless goods and services.
- Plan, schedule and initiate sales calls to potential corporate clients and report on a weekly basis.
- On site sales appointments and presentations
- Gain credibility and reliability with future clients by understanding their requirements for service and cost and developing strategies to win the business.
- Achieve sales goals.
- Actively promote EventTone Wireless in the market place by attending industry functions, following sales leads provided by internal and utilizing all networks.
- Report on a weekly basis to manage the status of existing and new leads.
- Respond quickly to sales leads opportunities.

General Statements

EventTone Wireless is a company in its initial stages of growth and branding. Though the Business Development Executive primary responsibilities are stated above, it is expected that any employee will assist in daily operations if needed. These responsibilities include but are not limited to:

- Assisting with Daily Orders
- Staffing of Trade or Industry Shows
- General Operational Tasks

Remuneration

The Business Development Executive position is a base, plus commission position. The actual rate of pay will be determined by EventTone Wireless staff member and the candidate.

Technical Information & Inventory Description

Glossary of Two Way Radio Terms

Base Station
A Transmitter / Receiver sited in a fixed location

Lithium ion (Li-ion)
This is the battery technology used in most mobile phones. Li-ion batteries hold more energy than other batteries of the same weight. They do not suffer from the memory effect that can damage other batteries if charged incorrectly.

NiCad (Nickel Cadmium)

NiMH (Nickel Metal Hydride)

Community Repeater
A repeater base station which is shared by several separate user groups

CTCSS
Continuous Tone Controlled Squelch System. CTCSS codes are sometimes referred to as 'privacy codes' as they allow several groups of radio users to make use of the same channel without overhearing the other groups.

dB
Decibel

DTMF
Dual Tone Multi-Frequency

Duplex
Simultaneous two-way sending and receiving

ERP
Effective Radiated Power

FM
Frequency Modulation

Handie-Talkie
Became a trademark of Motorola for a hand portable radio in 1951

Hz (Hertz) –
1 cycle per second
KHz (Kilohertz)
1,000 cycles per second

Lone Worker

A safety feature that is available on some radios for those who work alone. At pre-set intervals the lone worker will receive an audible alert from his radio to press a button. By pushing the button he is letting his control centre know that he is ok. However should the user continue to ignore the audible alerts then the radio will go into Emergency Mode and alert the control centre accordingly.

Manned Based Unit

Desk mounted radio with power supply and fist or desktop microphone

Man-Down

This is a safety feature available on some radios. A tilt-switch within the radio automatically sends an alarm signal when the radio is tipped on its side for longer than the pre-set period. However, the radio will first bleep to alert the user that the alarm signal will be sent if the radio is not repositioned upright. This feature alerts the other radio users to the possibly that the lone worker may have been, for example, overcome by a sudden illness or attacked.

MHz (Megahertz)

1,000,000 cycles per second

Mobile Radio

Radio installed in a vehicle

PMR

Private Mobile Radio or Professional / Personal Mobile Radio

PTT

Press-To-Talk or (Push-To-Talk)

This is the button on the radio that is held down to make the radio transmit and then released to receive.

RF

Radio Frequency

Repeater Base Unit

Unmanned fixed base unit with external antenna providing enhanced site coverage

RX

Receive

Sellcall

Selective Calling

Semi-Duplex or **Half Duplex**

This is when you can send and receive, but only one-way at a time, as with a two-way radio. The radio user is unable to interrupt the calling party and must wait until they finish before they can reply

Simplex
A one-way communications channel as used in paging systems

STS
Sequential Tone Signalling

Squelch
Electronic circuitry that mutes the radio speaker and controls the hissing 'white noise'

Talkthrough Repeater see (**Repeater Base Unit)**

TETRA
Terrestrial Trunked Radio

Transceiver
A radio that transmits and receives, the term being created by combining the words 'transmitter' and 'receiver'

Two Way Radio
A term used for any radio that transmits and receives

TX
Transmit

UHF
Ultra High Frequency (400 – 470 MHz) for business radios

VHF
Very High Frequency (136 – 174MHz) for business radios

Walkie Talkie
Is another reference for Two-Way Radio although the original name referred to a back pack radio.

Rental Equipment Description

Rental Equipment List

Analog

Motorola CP200 Analog Radio & Corresponding Accessories

Motorola CP200 Analog Radio

This radio is the workhorse of the industry. It is the most popular rental radio by far and fairly popular in most of the categories of business which use radios. Event production, construction, manufacturing, film and TV production, and more still request them. Motorola stopped manufacturing it in 2014 and has since, come out with a new version called the CP200D. It is basically the same radio, with the availability of a digital upgrade.

The radio offers 16 channel selection, with a consistent 4 watt output. The radio to radio coverage (also referred to as simplex or talk around) is from ½ mile to ¾ of a mile in the city and further in a location with less obstructions. They are also easy to program, extremely durable with an acceptable battery life of between 8-10 hours of average use.

Motorola CP200, 6, 12 & 18 Port Charging Stations

This is a multiple unit charging station. It holds up to 6 radios or spare batteries at a time and can charge them simultaneously. EventTone also uses multiple level chargers which have 12 or 18 ports allowing up to 18 radios charging in one unit.

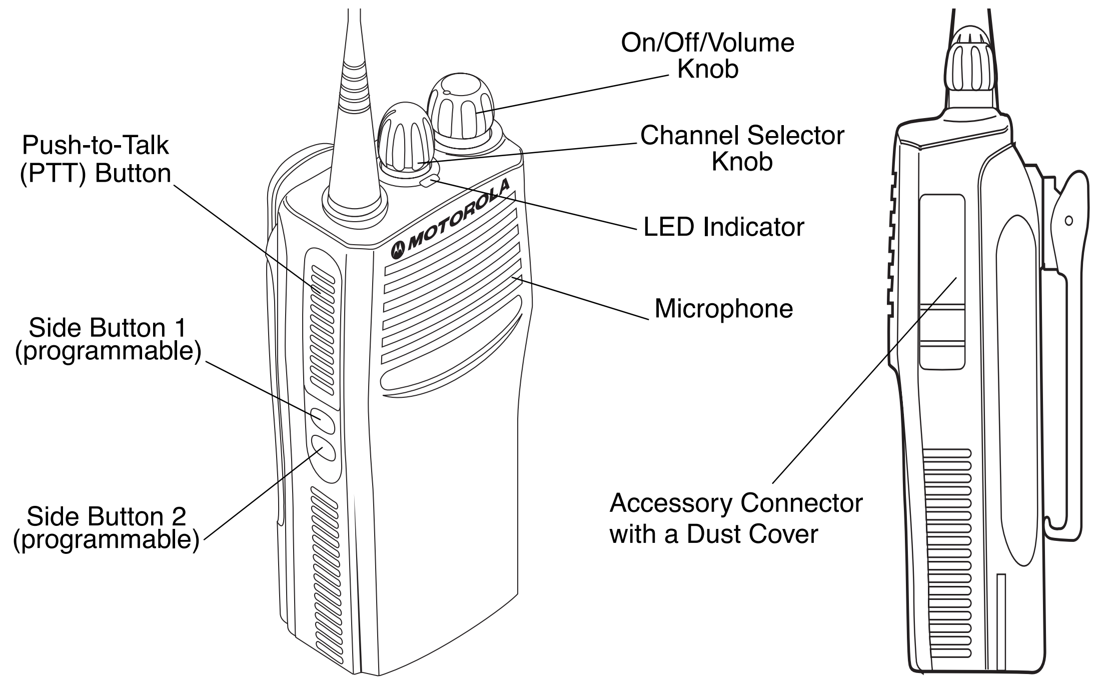
Motorola CP200 Battery

The batteries used for the CP200 are Lithium-Ion 2,500 mAh batteries. They are delivered with the belt clip attached.

RADIO OVERVIEW

PARTS OF THE RADIO

CP150/CP200 Models



Digital

Hytera PD562

EventTone began renting these digital portables in 2015 and they have become very popular.

They are light weight and smaller, but offer durability, long battery life and consistent output exceeding 4 watts. Also, they offer a stubby, shorter antenna is located at the center of the top of the radio making the radio much more comfortable to carry.

They are a great choice for, just about, every vertical. They are very popular with our female clients because they are smaller and much less cumbersome. They can be worn comfortably with dressier clothing. Also, since they are digital, they offer clearer audio, better coverage, can be programmed to work will with digital repeaters. They have a screen on the front of the radio to allow for channel labeling and texting, and, since they are digital, are designed to block out background noise.

The radio to radio coverage (also referred to as simplex) is from ½ mile to a mile in the city and further in a location with less obstructions. They can also be programmed with multiple zones, and can offer up to 512 channels.

Hytera 6, 12 & 18 Port Charging Stations

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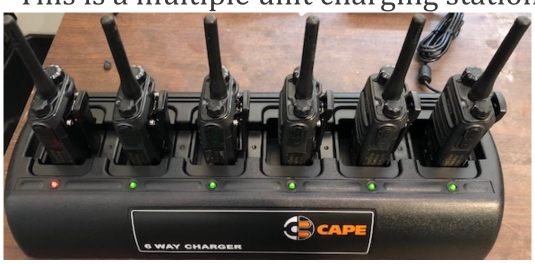

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Hytera PD562 Batteries

The batteries used for the Hytera PD562 is a Li-ion 1500mAh battery. It clips into the back of the radio.

Universal Accessories

Surveillance Microphone Kits



The headset accessories are our most popular. We stock hundreds of pieces because our clients request these headsets the most. They allow the user to communicate discreetly and easily whether you're in security or hospitality. The set includes a dual wire earpiece with a push to talk microphone and a clear acoustic tube with a soft acrylic ear bud for comfort during extended wear.

Speaker Microphones

These accessories have an assortment of different names. Though their proper name is "speaker microphones" you will hear clients refer to them as "hand mics", "fist mics", "brick mics" and more. These accessories are very popular in security, police work, contruction and other locations where privacy and discretion aren't as necessary. It attaches to the operator's clothing for louder audio and easier accessibility to the Push-To-Talk button. This mic makes it convenient to communicate by eliminating the need to remove the radio from your belt.

Light Headsets

These headsets are also referred to as "Madonna Mics" or "Singers Mics." They are not those kinds of microphones, but they do have that look.

They are simply a single ear head phone with a boom microphone attached. It allows the user to hear the communication while still hearing other stimuli. The boom mic allows for "hands free" communication.

These headsets are very popular in film and television production, along with live music and theatre shows.

"C" Rings and "D" Rings with Push To Talk Microphones

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The "C" or "D" Ring part is a label given to the part of the headset that sits **on** the ear instead of, like the surveillance microphone ear bud, sits **in** the ear. They are named for the shape of this part of the unit. They also have an "inline" "push to talk" microphone that the user can use to speak into.

"C" Ring Push To Talk

"D" Ring Push To Talk

Repeaters

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Analog Repeater

Digital Repeater

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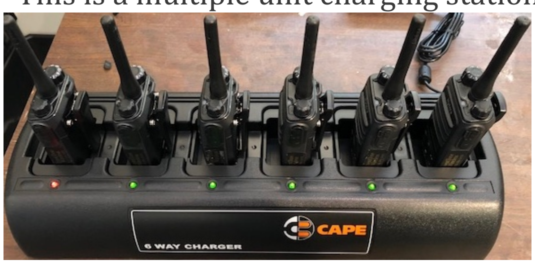

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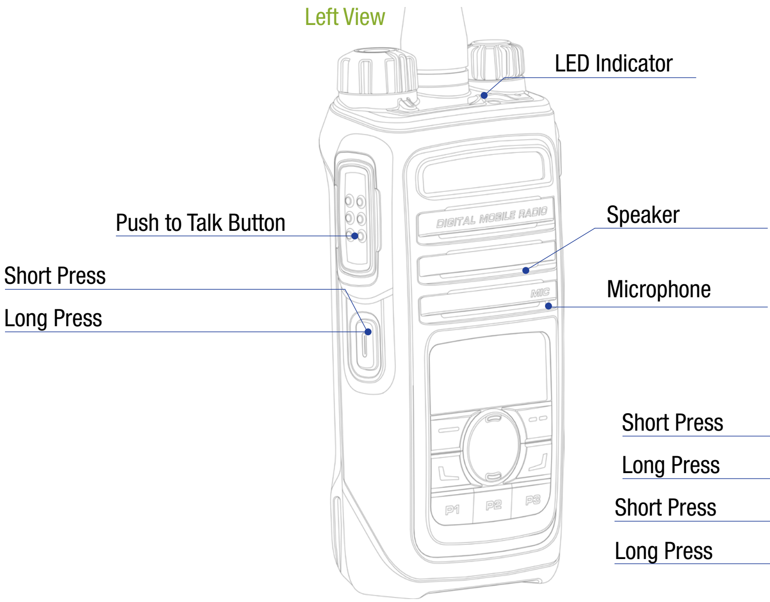
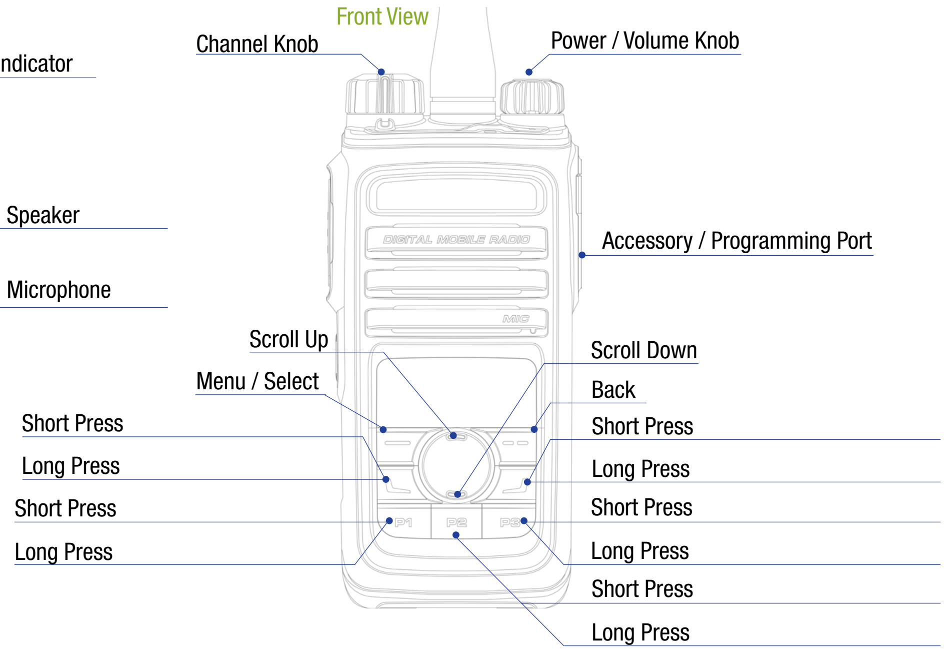
Radio Guide for





Radio Operation

Charging the Radio • Please ensure the radio is off when charging • Charging while the radio is on shortens the lifespan of your battery • Full charge may take up to 3 hours • The radio should be placed in the charger with the screen (front of radio) facing the front of the charger.	**Turning the Radio On** • Rotate the on / off volume knob to power on & set the volume • If the radio is tuned to a non-programmed channel it will emit a continuous error tone • Please reference the zone / channel list to select the appropriate channel
Viewing Text Messages • When the radio receives a text message it will beep, vibrate & display a mail icon • Pressing the select button will allow you to view the message • If multiple messages have been received, pressing the select button will display a list of messages • You can highlight the messages using the scroll button • Pressing the select button again will allow you to view the highlighted message	**Sending Text Messages** • To send a text, press the select button to display the menu • Use the scroll button to scroll down to the quick text option & press the select button • This will display the pre-programmed text messages • Use the scroll button to scroll until the desired message is highlighted then press the select button • Once completed, press the select button to confirm & select the send option, then select contact list • Use the scroll button to scroll to the desired contact & press the select button to send
Transmitting Voice Calls • To initiate a transmission hold the Push to Talk (PTT) Button • Once you press the PTT Button, the radio will emit a talk permit chirp • This talk permit chirp signals that you can begin to speak • When done speaking release the PTT Button • For a set period of time the system resources are held to allow immediate responses • If there is no response within this period the system will be released signaled by a call ended chirp	**Transmitting Voice Calls Out of Talkgroup** • To call outside your talkgroup press the contact list button to bring the list on the screen • Use the scroll button to highlight the desired contact • Press the PTT Button & you will transmit on the selected contact's talkgroup • The radio will stay on the selected group until a set time of inactivity or canceled via the home button
Receiving Voice Calls • Portables automatically receive transmissions on the Talkgroup • When receiving the screen will display the Talkgroup & the Radio ID / Alias of the transmitting unit	**Channel Controls** • There are zones • Each zone has channels programmed • To switch zones • To switch channels Turn the Channel Knob

Sprint Kyocera Direct Connect Cellular Phones

The Sprint Direct Connect phone is a solution for the client who needs to cover a large area and doesn't have access to a city wide, trunked, two-way radio repeater network. The phones are, for the most part, a hybrid between a cell phone and a two-way radio. It combines one on one instant communication with the benefits of using a cell tower network with nationwide coverage.

The downside to direct connect phones is that it only offers one to one communication. If, for example, you were a medical supervisor on a large event and you were required to contact your entire team on a single channel, you would be unable to do so. The only other option for this type of communication is the addition of an "all call" channel. There are, also, other options, but it requires additional programming and cost.

However, if your coverage area is large and instant coverage is required, Sprint Direct Connect phones are a great choice.

Mobile Units

These are vehicle mounted radios used to transmit within a local area, city or state. They are often installed into the dashboard of the vehicle and run off it's power source. Mobiles are perfect for someone who doesn't need to communicate away from their transportation.

Base Station

Base Stations are modified mobile units designed to be used as an onsite command center. They are plugged into the local power source and offer greater power and coverage than a portable.

Get Started

This section gives you all the information you need to set up your phone and Sprint service the first time.

Your Phone at a Glance

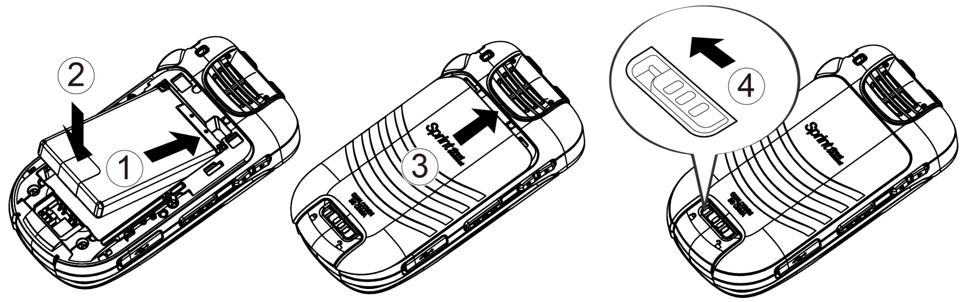
The illustration below shows the parts of your phone.

Set Up Your Phone

You must first install and charge the battery to begin setting up your phone.

1. Install the battery.

- Insert the battery into the battery compartment, making sure the connectors align (**1**). Gently press down to secure the battery (**2**).
- Position the back cover over the battery compartment, making sure the locking tabs align. Gently slide the cover upward with your thumbs until you hear a slight click (**3**).
- Slide the battery cover release latch to the locked position (**4**).



2. Charge your battery.
   - Plug the USB connector into the charger/accessory jack on the lower left side of your phone.
   - Plug the AC adapter into an electrical outlet.

Note: Your phone's battery should have enough charge for your phone to turn on and find a signal, set up your voicemail, and make a call. You should fully charge your battery as soon as possible.

3. Press END to turn the phone on.
   - If your phone is activated, it will search for Sprint service and enter standby mode.
   - If your phone is not yet activated, see Activate Your Phone for more information.

Activate Your Phone

Depending on your account or how and where you purchased your phone, it may be ready to use or you may need to activate it on your Sprint account.

- If you purchased your phone at a Sprint Store, it is probably activated and ready to use.
- If you received your phone in the mail and it is for a new Sprint account or a new line of service, it is designed to activate automatically.
- If you received your phone in the mail and you are activating a new phone for an existing number on your account (you're swapping phones), you can activate on your computer online or directly on your phone.

Activate on Your Computer

- Go to sprint.com/activate and follow the instructions to activate your phone.

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Analog Repeater **Digital Repeater**

Order Processing Paperwork

In this section, we will review a standard “Delivery Form.” This is the form you will be using to preview an order, understand the items in the order, fill and deliver the order.

The example we are using is of a more common order. They can be more or less complicated, but this example with represent most of the orders you should be handling.

Item 1. **EventTone Document QUO.20171215.486**
Date : 12/15/2017

Item 2. **Griffin Industries**
To : **Mr. Andy Muniz**
1401 Front Street
Yorktown Heights, NY 10598
United States

EventTone Wireless
Making Wireless Easy

Contact : James DeRosa
Phone : (855) 396-5450
Fax : (855) 224-0729
Mobile : (973) 801-6720

Item 3.

Rental: 12/15/2017 12:00 am To 12/15/2017 11:55 pm Item 4.

Description	Qty	Unit price	Line total
Client equipment rental includes the below mentioned date(s): Delivery Date: 12/15/2017 Return Date: 12/16/2017 Item 5. Total Days Rented: 1			
Motorola CP200 16 Channel/4 Watt Radio Replacement Cost: $500.00 Item 6.	70.00 *Day*	11.00	770.00
Motorola CP200 Battery Replacement Cost: $100.00 Item 7.	70.00 *Day*	0.00	0.00
Motorola CP200 Battery Replacement Cost: $100.00 Item 8.	35.00 *Day*	0.00	0.00
6 Port Multi Charging Station Replacement Cost: $450.00 Item 9.	5.00 *Day*	0.00	0.00
Surveillance Microphone Kit Replacement Cost: $125.00 Item 10.	70.00 *Day*	5.00	350.00
Heavy Duty Shipping and Travel Case Replacement Cost: $500.00 Item 11.	3.00 *Day*	0.00	0.00
Loss Protection Item 12.	50.00 *Day*	1.00	50.00
Estimated Delivery Fee Item 13.	1.00	75.00	75.00

Document number of items : 303

Notes :
Delivery Address:
Sheraton Times Square New York Hotel
811 7th Avenue
New York, NY 10019
Att: Andy Muniz

Item 14.

Item 15.

Total	**1,170.00 $**
Reduction (27.95%)	-327.00 $
Total after discount	843.00 $
Total shipping	75.00 $
Total	**918.00 $**
New York 8.88%	81.52 $
Total due	**999.52 $**

Item 16. Client signature :

Payment means : check, cash, direct debit, American Express, Visa, Mastercard, Discovercard

Check payable to : EventTone Wireless

Phone number : (917) 642-1224

Item 17.

I/We hereby rent the above listed equipment subject to following terms & conditions

1. Client is renting equipment specific to the dates stated on the above contract. Client understands fees stated are for those dates. If client retains equipment longer than dates stated above, the rental fees may continue to be charged until all equipment is returned to EventTone Wireless.
2. Product sales estimates are based on pricing pertinent to the date requested. If client delays purchase for 30 days or causes delays in delivery or installation increased costs may be incurred.
3. Client is fully responsible for all lost or damaged equipment caused by Client, based on the rates stated above and will be charged those costs immediately upon determination of lost or damaged equipment. If it is determined returned equipment is unrepairable, or if there are damages or losses missed on initial assessment, EventTone has the right to collect additional charges up to 30 days after equipment return date. Further, client understands they are completely responsible for all equipment until it is returned to EventTone Wireless or its representatives. This includes equipment left in the possession of hotels, shipping companies, warehouses, etc. Client understands and agrees EventTone Wireless has the right to charge for late returned, damaged or missing equipment. If, at any time, Client disputes the late, damaged or missing charges with credit card companies, merchant services providers or bank, and the dispute is found to be without merit, the Client may be charged an additional $200.00 to cover costs incurred by EventTone Wireless.
4. For rental orders, if equipment is not returned within 7 days of "Return" date stated above EventTone will consider equipment lost and unreturnable and client will be charged for the full value of all lost equipment. Late fees are assessed on all equipment, regardless of if the client was initially provided the equipment at no cost. Late fees may also include "loss of business" fees. "Loss of business" fees may be incurred if rental is not returned within 7 days of return date. The discount only covers technician fee. Any additional fees for room, board or travel expense may be charged to the client.
5. Based on inventory, EventTone may provision the order with different equipment than what is stated. Equipment will be comparable and of the same quality. All rented equipment cannot be taken out of the contiguous United States unless previously agreed by EventTone or it's agents.
6. Client agrees to indemnify EventTone or any of it's employees or agents and hold harmless from any claims, actions, suits, proceedings, costs, expenses or damages incurred or connected with from the equipment for the company or personnel provide hereunder.
7. Client understands a 50% deposit will be charged upon approval and the balance of the full payment is due 10 days before the start of rental period by cash, check or credit card and no terms are offered unless previously agreed to by EventTone Wireless. If client cancels rental within 21 days of rental start date, deposits are non-refundable. Any contract which total less than $500.00 may be collected in full. If client is renting for a term longer than one month and is being billed monthly, client understands EventTone has the right to increase fees by ten percent semi-annually based on any additional costs incurred by EventTone for said rental. Any lost or damaged equipment costs will be assessed and billed after the rental is completed. Client furthers understands that, based on certain equipment rented such as direct connect phones, tablets or satellite phones, additional fees may be incurred based on service requirements or enhancements.
8. If Client chooses to pay for rental by check or cash, a credit card is required to be kept on file. Credit card will be used to pay for lost or damaged equipment.
9. Long term rental client contracts (60 days or longer) allow for 1 service/maintenance call per month. Any additional "non-emergency" calls within the month will be billed at $95.00 per hour. Upon signing a long term rental contract, EventTone requires first and last month's payment. Upon cancellation, EventTone requires 30 days notice. If client choses to cancel an active, on going agreement with EventTone, said Client agrees to give EventTone right of first refusal before changing vendors in an effort to retain said contract. If Client cancels contract and fails to do so for any reason, EventTone has the right to charge client total due for balance of contract as damages for breach of contract. Long term contracts automatically renew at 6 months. Agreements are potentially subject to an increase at that time, not to exceed 10% to cover increased costs.
10. Client understands and agrees all items rented to be the sole property of EventTone Wireless and that the failure to return said items to EventTone Wireless may result in additional fees.
11. EventTone retains the right to alter the final amounts provided of non chargeable items such as chargers and batteries based on inventory and other requirements. If client rents any item requiring cellular service, whether voice or data, and provider of service increases rates for any reason, the additional cost will be added.
12. Based on payment or damage history, or if you are a new client, EventTone retains the right to initially collect an additional "security deposit" payment to cover damage and/or lost equipment that may equal up to 10% of the overall cost of equipment replacement. If all equipment is returned without damage, security deposit will be refunded within 7 days or rental return.
13. Shipping and delivery costs are estimates. EventTone Wireless retains the right to increase or decrease the rate based on circumstances. Additional shipping costs may be charged after rental period has concluded if it is determined extra costs were incurred by shipper. EventTone Wireless will provide proof of additional costs at client's request.
14. Additional Missing/Damaged Equipment Replacement Costs: Surveillance Microphones: Ear Tubes: $75.00. 2 Way Radio Belt Clips: $40.00. 2 Way Radio Antenna: $25.00.
15. If items rented by client are deemed to be malfunctioning in any way upon receipt of said items, it is the client's responsibility to notify EventTone Wireless within a 24 hour period. It is EventTone's responsibility to replace any malfunctioning equipment at it's expense. If client does not notify EventTone within that 24 hour period, it will be assumed by EventTone that equipment was damaged by client and client will be charged the

replacement costs for said equipment.
16. EventTone Wireless will deliver equipment to client clean, properly assembled, properly prepared and in good order. Client must return rented equipment to EventTone Wireless in the same condition or client may be charged an additional fee to cover labor charges required to do so.

Explanation of Estimate Form

As stated previously, the delivery form is the main form used by the Rental Department in the process of understanding, processing, delivering and reclaiming rental orders.

Each section to be explained is either numbered or highlighted.

Item 1.

This is the document numbering system. There are three documents in the order chain. The first is the Estimate or Quote which is written up by the sales representative. Once the Estimate or Quote is approved by the client, two more documents are generated. The first is the Invoice, which is created for collection of payment. The second is the Delivery Form which is used the fill the order.

Reviewing this section, you will see the Delivery Form number and, just above it is the "Parent Document" which is the originating Estimate or Quote number.

Just under these numbers is the date the document was created.

Item 2.

This is the client's name and the main company address.

Item 3.

This is the Sales Person's information.

Item 4.

This information is extremely important. It is the dates and duration of the rental agreement. The first date is the first day of the rental and the second is the last day of the rental.

Item 5.

This information is the delivery date and return date of the equipment. The date of delivery is, usually, the day before the first day of the rental period. The return is the day after the last day of the rental period. The "Total Days Rented" field is there for the client to fully understand the number of days they are being charged for.

Item 6.

This is the first item on the rental order. It is usually a two-way radio of some model. Here it is a Motorola CP200 Radio. It could also be a Hytera PD562 or some other radio we rent.

Item 7.

This line is an accounting of the radios attached to the radio listed above it. Understand, the client is responsible for every item they have rented until everything is fully returned. Sometimes the client removes the radio from the battery and we just receive one or the other back. If the client rents a certain number of radios, they are responsible for the radios and the batteries attached to them. Even though they are delivered connected, they are listed separately.

Item 8.

Along with the radios, the client also receives a number of extra, charged batteries in case one of the batteries already attached to the radios fail. These are accounted for here.

Item 9.

This line item accounts for any single or multi chargers the client receives as part of the rental.

Item 10.

This line item is for any accessories they should rent.

Item 11.

This line item covers any shipping or delivery cases used to transport the rental equipment.

Item 12.

Loss Protection is designed to offer the client a way of buying down the cost of replacing the equipment is it is lost or damaged. Without Loss Protection, they will be responsible for the full retail value of the lost or damaged equipment. With Loss Protection, they will be responsibe for the current value of the equipment allowing for wear and tear and depreciation.

This is NOT insurance. Insurance is regulated by the state and the federal government and you need proper licensing to sell or, even, offer it.

Item 13.

This is the cost of delivery. It is always an estimate until the order is processed.

Item 14.

This is a section for notes. Most times we input the delivery address here.

Item 15.

This is a listing of total charges including any discounts, sales tax and shipping.

Item 16.

Upon delivery of the order, the client should affix their signature here acknowledging full receipt of the equipment stated above on the Delivery Form.

Item 17.

This section includes all of our Terms and Conditions. This is the fine print. You should also read and understand them so you can offer an explanation if the client requests any.

Highlighted Fields

The highlighted items represent a statement of charges to be incurred by the renter if items rented are lost, damaged or malfunctioning when returned to us after the rental period has concluded.

For example, if the client loses or damages a Motorola CP200, the replacement cost is $500.00. The cost for the battery attached to that radio is $100.00. If they lose the radio and battery attached the total fee charged for replacement is $600.00.

Each line item listed on the Delivery Form is listed along with its replacement. That cost is also listed on the Quote and Invoice.

EventTone Wireless Sales Training Scripts

Before we begin, I just want to take this opportunity to say "thank you" for joining our team and we look forward working with you to help you achieve your goals. At EventTone Wireless we believe coaching and training offer our partners and employees the best opportunity to reach the kind of success they strive for.

In this manual, we have put together a series of telephone scripts to help you reach and interact with the proper decision maker for the different industries we serve.

You will notice much of the scripting is the same across most of the industries. Other than the point of contact and details that are industry specific, much of the conversation with the different clients will be similar. Your goal with each call is to reach the decision maker, connect, uncover if there is a need, offer information if they have nothing coming up immediately or a quote if there is, and to close the business.

Also, remember, these scripts are guidelines. Read through them first. Get the important points, then make them your own. NO ONE wants to hear from a caller just reading a script. That's why everyone hangs up on robocallers! Be personable. Integrate the scripting into your call and be conversational. Be accurate to the points, but engage the prospect. That's very important.

We have also included follow up email scripts to help with follow up, marketing, quote enclosures, gatekeepers and much more. We hope you find these scripts helpful.

If you have any questions, please feel free to call us at 855-396-5450. We are here to help.

Rental Scripts

Trade Show and Conventions

The first point you need to be aware of when it comes to this industry, is the size of the show. Many smaller shows do not require our type of rental service. They may use cell phones, or may own a cheap set of walkie talkies they purchase at a large box store.

Most trade show & convention rentals tend to be smaller rentals. There requests fall between 15-20 radios. As always, there are exceptions to this rule. Many of the larger conventions held in major convention centers such as New York, Las Vegas and Los Angeles, can be enormous. Do your research before you reach out. It will help to understand the size of the event when you are speaking with the prospect.

"Hello, my name is ___________________________ and I'm calling with EventTone Wireless. We provide two-way radio, direct connect phone and wireless equipment. One of our specialties is the trade show and convention industry and we work with large productions all over the country. May I ask who is responsible for procuring your wireless communications equipment?"

(Most of the time, the person who procures this equipment is either the Production or Operations Manager. With smaller companies, it's the owner. If the person who answers is not the person in charge, they will switch you. If you get a voice mail, leave a message and call back. Ask the receptionist for that person's email. Once you have it refer to the email scripts in this manual. If you do make contact proceed to the next part of the script.)

"Hello Mr./Ms. ______________________ (always use their formal name unless they tell you to be less formal), my name is ____________________________ with EventTone Wireless. We provide two way radio and wireless communications equipment for trade shows and conventions. The reason I'm calling is I'm wondering if you use this type of equipment for your productions, and if so, if we may be able to help you with that need?"

(Listen to the client. If they say "no we are happy with who we have" simply say, "I understand, ok no problem. What is it about them you like?" At this point, they may just be too busy and hang up, or they may tell you. Most of the time it's because the equipment is offered at a good price or your competitor is just doing a good job and they are happy. If the client is genuinely happy with the service, we believe you shouldn't belabor the point. Just say "thank you" and ask if you can send some information about you and the company. They will, almost always, say "yes." At this point, refer to one of the email scripts, attach a virtual business card and put them in your tickler file for 3-6 months out.)

(If they tell you it's a pricing issue move on the next part of the script.)

"Ok, so you believe their pricing is competitive. Can I just ask you something? If I can offer you comparable or better service at a lower price, would you be interested?" (They will, almost always, say "yes") Ok, great, let's start there. Can you provide me with a copy of your last order, or just tell me your equipment needs for an upcoming event so I can send you a quote? (They will either just tell you, or send you a previous quote via email.) One last question, can I just ask what your budget is for radios? We're pretty flexible and we want to win your business, but, if there are companies that provide a cheaper, less powerful and less durable radio than we do so they can offer much cheaper pricing. I just want to make sure we are comparing apples to apples."

At this point, it becomes a negotiation and it helps to have some idea where their price point is. Remember we have to make a profit so it helps if the prospect's pricing is reasonable. Once you have this information, you're on your way.

Sporting Events & Marathons

The most unique aspect of the industry is the enormous range of the need. If your prospect is only doing a 5K or small sporting event, the order could be very small. On the other hand, we have done work with large 26.2 mile marathons and large, international sporting events, and the need can run into the thousands of pieces.

With the larger events, they will not give you the contract over the phone. The goal is to set up a meeting or presentation.

"Hello, my name is __________________________ and I'm calling with EventTone Wireless. We provide two-way radio, direct connect phone and wireless equipment. One of our specialties is the sporting events and marathons and we work with both small and large events all over the country. May I ask who is responsible for procuring your wireless communications equipment?"

(Most of the time, the person who procures this equipment is either the Production, Communications or Operations Manager. With smaller companies, it's the owner. If the person who answers is not the person in charge, they will switch you. If you get a voice mail, leave a message and call back. Ask the receptionist for that person's email. Once you have it refer to the email scripts in this manual. If you do make contact proceed to the next part of the script.)

"Hello Mr./Ms. ____________________ (always use their formal name unless they tell you to be less formal), my name is __________________________ with EventTone Wireless. We provide two way radio and wireless communications equipment for sporting events and marathons. The reason I'm calling is I'm wondering if you use this type of equipment for your productions, and if so, if we may be able to help you with that need?"

(Listen to the client. If they say "no we are happy with who we have" simply say, "I understand, ok no problem. What is it about them you like?" At this point, they may just be too busy and hang up, or they may tell you. Most of the time it's because the equipment is offered at a good price or your competitor is just doing a good job and they are happy. If the client is genuinely happy with the service, we believe you shouldn't belabor the point. Just say "thank you" and ask if you can send some information about you and the company. They will, almost always, say "yes." At this point, refer to one of the email scripts, attach a virtual business card and put them in your tickler file for 3-6 months out.)

(If they tell you it's a pricing issue move on the next part of the script.)

"Ok, so you believe their pricing is competitive. Can I just ask you something? If I can offer you comparable or better service at a lower price, would you be interested?" (They will, almost always, say "yes") Ok, great, let's start there. Can you provide me with a copy of your last order, or just tell me your equipment needs for an upcoming event so I can send you a quote? (They will either just tell you, or send you a previous quote via email.) One last question, can I just ask what your budget is for radios? We're pretty flexible and we want to win your business, but, if there are companies that provide a cheaper, less powerful and less durable radio than we do so they can offer much cheaper pricing. I just want to make sure we are comparing apples to apples."

At this point, it becomes a negotiation and it helps to have some idea where their price point is. Remember we have to make a profit so it helps if the prospect's pricing is reasonable. Once you have this information, you're on your way.

Construction

Constructions rentals can be great. Most of the time, they will rent for longer periods of time and, long term rentals, are less work and more profitable.

However, there is a down side to construction rentals. They are extremely abusive to the equipment. Honestly, it's just the nature of their business. The area is dirty, the work is dangerous at times, and the rental equipment takes a beating. Understand this when you are quoting.

"Hello, my name is ___________________________ and I'm calling with EventTone Wireless. We provide two-way radio, direct connect phone and wireless equipment. One of our specialties is the construction industry and we work with large and small companies all over the country. May I ask who is responsible for procuring your wireless communications equipment?"

(Most of the time, the person who procures this equipment is the individual project manager. Most large construction companies have several projects going at once and the person procuring the equipment is the person in charge of the specific project. With smaller companies, it's the owner. If the person who answers is not the person in charge, they will switch you. If you get a voice mail, leave a message and call back. Ask the receptionist for that person's email. Once you have it refer to the email scripts in this manual. If you do make contact proceed to the next part of the script.)

"Hello Mr./Ms. ______________________ (always use their formal name unless they tell you to be less formal), my name is ____________________________ with EventTone Wireless. We provide two way radio and wireless communications equipment for construction projects. The reason I'm calling is I'm wondering if you use this type of equipment for your projects, and if so, if we may be able to help you with that need?"

(Listen to the client. If they say "no we are happy with who we have" simply say, "I understand, ok no problem. What is it about them you like?" At this point, they may just be too busy and hang up, or they may tell you. Most of the time it's because the equipment is offered at a good price or your competitor is just doing a good job and they are happy. If the client is genuinely happy with the service, we believe you shouldn't belabor the point. Just say "thank you" and ask if you can send some information about you and the company. They will, almost always, say "yes." At this point, refer to one of the email scripts, attach a virtual business card and put them in your tickler file for 3-6 months out.)

(If they tell you it's a pricing issue move on the next part of the script.)

"Ok, so you believe their pricing is competitive. Can I just ask you something? If I can offer you comparable or better service at a lower price, would you be interested?" (They will, almost always, say "yes") Ok, great, let's start there. Can you provide me with a copy of your last order, or just tell me your equipment needs for an upcoming event so I can send you a quote? (They will either just tell you, or send you a previous quote via email.) One last question, can I just ask what your budget is for radios? We're pretty flexible and we want to win your business, but, if there are companies that provide a cheaper, less powerful and less durable radio than we do so they can offer much cheaper pricing. I just want to make sure we are comparing apples to apples."

At this point, it becomes a negotiation and it helps to have some idea where their price point is. Remember we have to make a profit so it helps if the prospect's pricing is reasonable. Once you have this information, you're on your way.

Music and Theatrical Touring

These types of rentals are also great to get. They are usually long term, last months and, sometimes, years. However, like construction, they are abusive to the equipment. Many of the workers on these projects are contractors and they have less of an interest in making sure the equipment is well maintained.

However, long term rentals such as these are delivered and picked up once, and get billed every month. They are guaranteed income for the run contract.

"Hello, my name is ____________________________ and I'm calling with EventTone Wireless. We provide two-way radio, direct connect phone and wireless equipment. One of our specialties is the music and theatrical touring and we work with some of the larger production companies. May I ask who is responsible for procuring your wireless communications equipment?"

(Most of the time, the person who procures this equipment is the individual tour manager. The tour manager is in charge of everything to do with the needs of the tour. If the person who answers is not the person in charge, they will switch you. If you get a voice mail, leave a message and call back. Ask the receptionist for that person's email. Once you have it refer to the email scripts in this manual. If you do make contact proceed to the next part of the script.)

"Hello Mr./Ms. _______________________ (always use their formal name unless they tell you to be less formal), my name is ____________________________ with EventTone Wireless. We provide two way radio and wireless communications equipment for touring companies. The reason I'm calling is I'm wondering if you use this type of equipment for your productions, and if so, if we may be able to help you with that need?"

(Listen to the client. If they say "no we are happy with who we have" simply say, "I understand, ok no problem. What is it about them you like?" At this point, they may just be too busy and hang up, or they may tell you. Most of the time it's because the equipment is offered at a good price or your competitor is just doing a good job and they are happy. If the client is genuinely happy with the service, we believe you shouldn't belabor the point. Just say "thank you" and ask if you can send some information about you and the company. They will, almost always, say "yes." At this point, refer to one of the email scripts, attach a virtual business card and put them in your tickler file for 3-6 months out.)

(If they tell you it's a pricing issue move on the next part of the script.)

"Ok, so you believe their pricing is competitive. Can I just ask you something? If I can offer you comparable or better service at a lower price, would you be interested?" (They will, almost always, say "yes") Ok, great, let's start there. Can you provide me with a copy of your last order, or just tell me your equipment needs for an upcoming event so I can send you a quote? (They will either just tell you, or send you a previous quote via email.) One last question, can I just ask what your budget is for radios? We're pretty flexible and we want to win your business, but, if there are companies that provide a cheaper, less powerful and less durable radio than we do so they can offer much cheaper pricing. I just want to make sure we are comparing apples to apples."

At this point, it becomes a negotiation and it helps to have some idea where their price point is. Remember we have to make a profit so it helps if the prospect's pricing is reasonable. Once you have this information, you're on your way.

Event Production

The Event business is a very large net. It encompasses everything from fundraisers and galas, to awards ceremonies and corporate events. With most of these events, instant and private communication is key. Most event producers are looking for light weight, durable two-way radios with a headset. Usually this is either a surveillance microphone or an ear piece with a "push to talk" in line microphone.

Most of these rentals are smaller, only one or two nights, and most will only use between 10-30 radios.

"Hello, my name is ___________________________ and I'm calling with EventTone Wireless. We provide two-way radio, direct connect phone and wireless equipment. One of our specialties is the event production industry and we work with large productions all over the country. May I ask who is responsible for procuring your wireless communications equipment?"

(Most of the time, the person who procures this equipment is the individual project manager. Most large event production companies have several projects going at once and the person procuring the equipment is the person in charge of the specific project. With smaller companies, it's the owner. If the person who answers is not the person in charge, they will switch you. If you get a voice mail, leave a message and call back. Ask the receptionist for that person's email. Once you have it refer to the email scripts in this manual. If you do make contact proceed to the next part of the script.)

"Hello Mr./Ms. ______________________ (always use their formal name unless they tell you to be less formal), my name is ___________________________ with EventTone Wireless. We provide two way radio and wireless communications equipment for event production. The reason I'm calling is I'm wondering if you use this type of equipment for your productions, and if so, if we may be able to help you with that need?"

(Listen to the client. If they say "no we are happy with who we have" simply say, "I understand, ok no problem. What is it about them you like?" At this point, they may just be too busy and hang up, or they may tell you. Most of the time it's because the equipment is offered at a good price or your competitor is just doing a good job and they are happy. If the client is genuinely happy with the service, we believe you shouldn't belabor the point. Just say "thank you" and ask if you can send some information about you and the company. They will, almost always, say "yes." At this point, refer to one of the email scripts, attach a virtual business card and put them in your tickler file for 3-6 months out.)

(If they tell you it's a pricing issue move on the next part of the script.)

"Ok, so you believe their pricing is competitive. Can I just ask you something? If I can offer you comparable or better service at a lower price, would you be interested?" (They will, almost always, say "yes") Ok, great, let's start there. Can you provide me with a copy of your last order, or just tell me your equipment needs for an upcoming event so I can send you a quote? (They will either just tell you, or send you a previous quote via email.) One last question, can I just ask what your budget is for radios? We're pretty flexible and we want to win your business, but, if there are companies that provide a cheaper, less powerful and less durable radio than we do so they can offer much cheaper pricing. I just want to make sure we are comparing apples to apples."

At this point, it becomes a negotiation and it helps to have some idea where their price point is. Remember we have to make a profit so it helps if the prospect's pricing is reasonable. Once you have this information, you're on your way.

Sales Scripts

Health Care & Senior Facilities

"Hello, my name is ___________________________ and I'm calling with EventTone Wireless. We provide two-way radio, direct connect phone and wireless equipment. One of our specialties is to design and install two way and wireless communications networks for health care facilities. May I ask who is responsible for procuring your wireless communications equipment?"

(Most of the time, the person who procures this equipment is the facilities or IT manager. With Health Facilities and Senior Facilities, communications are extremely important. Their concerns will be complete coverage with no dead spots. They are dealing with life and death situations, so efficient communications are imperative. When you speak with the point of contact, work that point.

If the person who answers is not the person in charge, they will switch you. If you get a voice mail, leave a message and call back. Ask the receptionist for that person's email. Once you have it refer to the email scripts in this manual. If you do make contact proceed to the next part of the script.)

"Hello Mr./Ms. ______________________ (always use their formal name unless they tell you to be less formal), my name is ___________________________ with EventTone Wireless. We provide two-way radio and wireless communications equipment for facilities like yours. The reason I'm calling is I would like the opportunity to speak with you about improving your wireless communications network. May I ask what kind of wireless communications system you are currently using?"

(Listen to the client. If they say "no, we are happy with what we have", or, "we don't currently have a budget for new equipment right now", simply say, "I understand, ok no problem. May I ask what you are currently using?" At this point, they may just be too busy and hang up, or they may tell you. Facilities like this live and die by budgets. If they have the money, they'll be interested. They get funding and they want to spend it. If they don't have the funds, you can talk until you're blue. They will not move forward. If this is the case, we believe you shouldn't belabor the point. Just say "thank you" and ask if you can send some information about you and the company. They will, almost always, say "yes." At this point ask for their email, refer to one of the email scripts, attach a virtual business card and put them in your tickler file for 3-6 months out.

Another angle to get your equipment in their hands is to ask if any of their current radios are not working and, instead of repairing it, purchase one or two to integrate into their current network. We can program our equipment to work with theirs. If we can get a few in their hands and they like them, they will continue to purchase more as their old fleet begins to die.

Also, remember, these types of calls are designed to find the need. It is different from the rental calls. With rental calls you are hoping to get information and a quote into their hands. With a sales call you are trying to find potential clients who have the budget to make the purchase. Our products are not impulse buys. If the client needs it, they will want to take the next step. If they don't, they won't.)

(If they tell you they are have the funds)

"Ok, great. Our first step is to meet with you and your staff and do an onsite walk through of the facility. We need to see the lay of the land and we need to speak with you all about your needs and preferences. Let me get my calendar. Which day next week would be good for you?"

For facilities such as these, the orders are larger and will take time to put together. Your goal for this initial phone call is to get an appointment and a meeting

Warehouse and Manufacturing Facilities

"Hello, my name is ___________________________ and I'm calling with EventTone Wireless. We provide two-way radio, direct connect phone and wireless equipment. One of our specialties is to design and install two way and wireless communications networks for facilities such as yours. May I ask who is responsible for procuring your wireless communications equipment?"

(Most of the time, the person who procures this equipment is the facilities or security manager. With these facilities, their concerns will be complete coverage with no dead spots. They are concerned with security. When you speak with the point of contact, work that point.

If the person who answers is not the person in charge, they will switch you. If you get a voice mail, leave a message and call back. Ask the receptionist for that person's email. Once you have it refer to the email scripts in this manual. If you do make contact proceed to the next part of the script.)

"Hello Mr./Ms. ______________________ (always use their formal name unless they tell you to be less formal), my name is ___________________________ with EventTone Wireless. We provide two-way radio and wireless communications equipment for facilities like yours. The reason I'm calling is I would like the opportunity to speak with you about improving your wireless communications network. May I ask what kind of wireless communications system you are currently using?"

(Listen to the client. If they say "no, we are happy with what we have", or, "we don't currently have a budget for new equipment right now", simply say, "I understand, ok no problem. May I ask what you are currently using?" At this point, they may just be too busy and hang up, or they may tell you. Facilities like this live and die by budgets. If they have the money, they'll be interested. They get funding and they want to spend it. If they don't have the funds, you can talk until you're blue. They will not move forward. If this is the case, we believe you shouldn't belabor the point. Just say "thank you" and ask if you can send some information about you and the company. They will, almost always, say "yes." At this point ask for their email, refer to one of the email scripts, attach a virtual business card and put them in your tickler file for 3-6 months out.

Another angle to get your equipment in their hands is to ask if any of their current radios are not working and, instead of repairing it, purchase one or two to integrate into their current network. We can program our equipment to work with theirs. If we can get a few in their hands and they like them, they will continue to purchase more as their old fleet begins to die.

Also, remember, these types of calls are designed to find the need. It is different from the rental calls. With rental calls you are hoping to get information and a quote into their hands. With a sales call you are trying to find potential clients who have the budget to make the purchase. Our products are not impulse buys. If the client needs it, they will want to take the next step. If they don't, they won't.)

(If they tell you they are have the funds)

"Ok, great. Our first step is to meet with you and your staff and do an onsite walk through of the facility. We need to see the lay of the land and we need to speak with you all about your needs and preferences. Let me get my calendar. Which day next week would be good for you?"

For facilities such as these, the orders are larger and will take time to put together. Your goal for this initial phone call is to get an appointment and a meeting.

Real Estate and Property Managers

"Hello, my name is __________________________ and I'm calling with EventTone Wireless. We provide two-way radio, direct connect phone and wireless equipment. One of our specialties is to design and install two way and wireless communications networks for facilities such as yours. May I ask who is responsible for procuring your wireless communications equipment?"

(Most of the time, the person who procures this equipment is the property manager. With these facilities, their concerns will be the best coverage they can get. They are concerned with security and communications between the office and maintenance. When you speak with the point of contact, work that point.

If the person who answers is not the person in charge, they will switch you. If you get a voice mail, leave a message and call back. Ask the receptionist for that person's email. Once you have it refer to the email scripts in this manual. If you do make contact proceed to the next part of the script.)

"Hello Mr./Ms. ______________________ (always use their formal name unless they tell you to be less formal), my name is __________________________ with EventTone Wireless. We provide two-way radio and wireless communications equipment for facilities like yours. The reason I'm calling is I would like the opportunity to speak with you about improving your wireless communications network. May I ask what kind of wireless communications system you are currently using?"

(Listen to the client. If they say "no, we are happy with what we have", or, "we don't currently have a budget for new equipment right now", simply say, "I understand, ok no problem. May I ask what you are currently using?" At this point, they may just be too busy and hang up, or they may tell you. Facilities like this tend to buy small amounts unless it's a new development. If they have the money, they'll be interested. They get funding and they want to spend it. If they don't have the funds, you can talk until you're blue. They will not move forward. If this is the case, we believe you shouldn't belabor the point. Just say "thank you" and ask if you can send some information about you and the company. They will, almost always, say "yes." At this point ask for their email, refer to one of the email scripts, attach a virtual business card and put them in your tickler file for 3-6 months out.

Another angle to get your equipment in their hands is to ask if any of their current radios are not working and, instead of repairing it, purchase one or two to integrate into their current network. We can program our equipment to work with theirs. If we can get a few in their hands and they like them, they will continue to purchase more as their old fleet begins to die.

Also, remember, these types of calls are designed to find the need. It is different from the rental calls. With rental calls you are hoping to get information and a quote into their hands. With a sales call you are trying to find potential clients who have the budget to make the purchase. Our products are not impulse buys. If the client needs it, they will want to take the next step. If they don't, they won't.)

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"Ok, great. Our first step is to meet with you and your staff and do an onsite walk through of the facility. We need to see the lay of the land and we need to speak with you all about your needs and preferences. Let me get my calendar. Which day next week would be good for you?"

For facilities such as these, the orders are larger and will take time to put together. Your goal for this initial phone call is to get an appointment and a meeting.

Retail and Warehouse Stores

"Hello, my name is ___________________________ and I'm calling with EventTone Wireless. We provide two-way radio, direct connect phone and wireless equipment. One of our specialties is to design and install two way and wireless communications networks for facilities such as yours. May I ask who is responsible for procuring your wireless communications equipment?"

(Most of the time, the person who procures this equipment is the store manager or the administration manager. With these facilities, their concerns will be complete coverage. They are concerned with security and with immediate communications. Also, these locations are notoriously cheap. They, most likely, will not purchase any "high end" equipment. If you try to sell them those, you'll have a short conversation. Focus on value, value, value!!! When you speak with the point of contact, work that point.

If the person who answers is not the person in charge, they will switch you. If you get a voice mail, leave a message and call back. Ask the receptionist for that person's email. Once you have it refer to the email scripts in this manual. If you do make contact proceed to the next part of the script.)

"Hello Mr./Ms. ______________________ (always use their formal name unless they tell you to be less formal), my name is ___________________________ with EventTone Wireless. We provide two-way radio and wireless communications equipment for facilities like yours. The reason I'm calling is I would like the opportunity to speak with you about improving your wireless communications network. May I ask what kind of wireless communications system you are currently using?"

(Listen to the client. If they say "no, we are happy with what we have", or, "we don't currently have a budget for new equipment right now", simply say, "I understand, ok no problem. May I ask what you are currently using?" At this point, they may just be too busy and hang up, or they may tell you. Facilities like this live on funding. They are given funds to operate and they have to be smart with them. They get funding to use on a monthly basis, usually. If they don't have the funds, you can talk until you're blue. They will not move forward. If this is the case, we believe you shouldn't belabor the point. Just say "thank you" and ask if you can send some information about you and the company. They will, almost always, say "yes." At this point ask for their email, refer to one of the email scripts, attach a virtual business card and put them in your tickler file for 3-6 months out.

(Another angle to get your equipment in their hands is to ask if any of their current radios are not working and, instead of repairing it, purchase one or two to integrate into their current network. We can program our equipment to work with theirs. If we can get a few in their hands and they like them, they will continue to purchase more as their old fleet begins to die.)

(Also, remember, these types of calls are designed to find the need. It is different from the rental calls. With rental calls you are hoping to get information and a quote into their hands. With a sales call you are trying to find potential clients who have the budget to make the purchase. Our products are not impulse buys. If the client needs it, they will want to take the next step. If they don't, they won't.)

(If they tell you they are have the funds)

"Ok, great. Our first step is to meet with you and your staff and do an onsite walk through of the facility. We need to see the lay of the land and we need to speak with you all about your needs and preferences. Let me get my calendar. Which day next week would be good for you?"

For facilities such as these, the orders are larger and will take time to put together. Your goal for this initial phone call is to get an appointment and a meeting.

Schools and Education

"Hello, my name is ___________________________ and I'm calling with EventTone Wireless. We provide two-way radio, direct connect phone and wireless equipment. One of our specialties is to design and install two way and wireless communications networks for health care facilities. May I ask who is responsible for procuring your wireless communications equipment?"

(Most of the time, the person who procures this equipment is either the facilities, IT, security or operations manager, or the principal of the school. With these facilities, communications are extremely important. Their concerns will be complete coverage with no dead spots. They are dealing with life and death situations, so efficient communications are imperative. When you speak with the point of contact, work that point.

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Restaurants and Catering

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Email Scripts

Introductory Email

This script is best used after you have spoken to the prospect for the first time and they are asking for information.

____________________-

Thanks so much for the kind words before. I really appreciate it.

Below is my contact information. All of us at EventTone are working hard to make things easier and more convenient for our clients. We offer the finest equipment at a lower price point than our competitors, but it's our service that sets us apart. We're here 24/7/365 to support you. If you need a last minute delivery, help with a current rental or on site planning and consulting to make sure everything go smoothly, we're here to help.

I've attached my personal signature with all my contact information. My cell is __________. Feel free to call me at anytime.

To better serve our clients we've expanded our website considerably. If, in the future, it is easier for you to send us an order request on line, you can do that right from our website by clicking here. We also offer a "Client Access" password protected page with instructional information, educational videos, equipment descriptions and, if you need any tax or business documentation from us, links to our W9 form, certificate of insurance and more. The password is "Client123". However, if you'd rather call our offices we'd love to hear from you. Give us a call at 855-396-5450.

For the sake of thoroughness, could you please reply and let me know you received this.

I really look forward to working with you.

____
EventTone Wireless
Office: 855-396-5450
Cell: ______________________
________________@eventtone.com
www.eventtone.com

Post Meeting Thank You Email Script

I just wanted to take a moment and express a sincere thank you for taking the time to speak with me. I know how busy you are and I appreciate the time you took. We understand you have choices and we will work our hardest to make sure you are happy if you choose EventTone Wireless.

Please let me know if there is anything we can help you with that we did not discuss. Our company is expanding it's inventory constantly and are adding new equipment, services and consulting. If you have your own equipment, we also have repair technicians ready to help.

We've also expanded our website considerably. If, in the future, it is easier for you to send us an order request on line, you can do that right from our website by clicking here, or you can just call us if you'd like. Our toll free number is 855-396-5450.

We also offer a "Client Access" password protected page with instructional information, educational videos, equipment descriptions and, if you need any documentation from us, links to our W9 form, certificate of insurance and more. The password is "Client123".

Again, thank you very much for everything. We're here because of you and I promise, all of us genuinely appreciate your consideration.

____

EventTone Wireless
Office: 855-396-5450
Cell: ________________________
_________________@eventtone.com
www.eventtone.com

“Checking In” Email Script

This is an email designed as a follow up email to someone you’ve spoken with once and have been unable to connect with again.

________________________________-

We spoke about a month ago and discussed communications needs for upcoming project. I just wanted to take a moment and reconnect. I know, in the flurry of activity that comes with putting everything together, many times your wireless needs are the last thing on your mind. With that in mind, I thought I would just shoot you an email and remind you we're here.

If you find you have a need for 2 way radios, direct connect phones, repeaters, satellite phones, or any other wireless communications, please give me a call anytime. We try to be reachable when it's convenient for you. Our toll free number is 855-396-5450.

If it's more convenient for you to do it online, you can send us a rental request from our website by just clicking here.

I look forward to working with you and for helping to make your projects a little easier to put together.

Thanks for your time and consideration.

Quote Enclosure Email Script

This email should be included with each quote you send. It explains the process to the client completely and offers them additional information if they need it.

Attached, please find the quote we spoke of.

If everything is in order, please fill out the forms, sign and email them back to me here. I will follow up with you to go over everything and answer any questions you may have.

To better serve our clients we've expanded our website considerably. If, in the future, it is easier for you to send us an order request on line, you can do that right from our website by clicking here. We also offer a "Client Access" password protected page with instructional information, educational videos, equipment descriptions and, if you need any tax or business documentation from us, links to our W9 form, certificate of insurance and more. The password is "Client123". However, if you'd rather call our offices we'd love to here from you. Give us a call at 855-396-5450.

For the sake of thoroughness, can you please acknowledge receipt of this quote. Simply a “got it” or words to that affect, would be greatly appreciated.

Again, thanks for trusting EventTone Wireless.

Marketing Email

This email is designed as an insert into a follow up email to a prospect who is asking for more information. It's a bit wordy, but it is complete.

Thanks for your interest in our company and for taking the time to talk. I truly enjoyed it.

EventTone Wireless new voice in wireless equipment sales, rental and service solutions that's been around for years! The staff from Eventtone has years of experience providing solutions for small and large companies all over the US. Our staff of systems engineers have designed solutions for Amazon, Walgreens, Trader Joes, and many of America's finest companies. Our rental team have designed, produced and executed communications plans for some the largest one-day and multiple day marque events in the world along with hundreds of smaller and mid size experiences. We understand wireless communications and have the experience to help you design every step of your communications plan.

We offer a wide range of communications solutions including:

- Top Quality Hytera Digital and Analog Portables
- A Full Line of Motorola Mototrbo and Analog Equipment
- Our most popular Motorola CP200 Series Analog Radios
- Intrinsically Safe Industrial Grade 2 Way Radios
- Full Range of Accessories and Headsets
- Mobile Units for Buses & Taxis
- Motorola Digital and Analog Repeaters
- Sprint Direct Connect Phones
- Satellite Phones & International Minutes
- Sprint mobile broadband and MiFi cards

We offer monthly, weekly, and even daily rates for rentals, as well as 24/7 customer service, staffing, and technical support. Our dedicated professionals are also available to ensure your rental application is set up and fully supported for optimal performance.

Applications

Some of the more common applications for our equipment include:

- Police and EMT
- Healthcare
- Large and Small events
- Film and Television Production
- Touring Music and Theatre Productions
- Fairs and festivals
- Sporting events

- Concerts
- Petrochemical refinery turnarounds
- School and church outings
- Corporate events
- Security operations
- Transportation companies
- Travel services
- Industry associations

www.eventtone.com

We've also expanded our website considerably. If, in the future, it is easier for you to send us an order request on line, you can do that right from our website by heading to our “Online Catalog & Ordering” page. From that page you can see our entire catalog and request a quote 24 hours a day, 7 days a week.

Give us a call at 855-396-5450. We’ll be happy to show you how you can get the finest equipment for your needs with the kind of service and attention that will make you a lifetime customer.

Sorry for being so long winded, but I really did want to cover everything. I never know which service or item a client may need so I wanted to make sure I cover all the bases.

Again, it was really a pleasure speaking with you and I do hope to work with you soon.

Gatekeeper Email

This email script was designed as a way to get to the prospect when they have a "gatekeeper" such as a receptionist or assistant that won't put you through to them.

I have left a few voicemails but your office explained just how busy you are so I thought an email might be more efficient.

My name is _______________. I was the __________manager for the for EventTone Wireless. We offer two way radios and wireless communications for some of the largest companies in your industry. We have a combined experience of over 3 decades serving companies like yours. We specialize in offering the finest equipment, and the most committed customer service at the very best price available anywhere.

I know you have projects coming up and I would like the opportunity to prove to you how EventTone can fulfill your communications needs and offer a much improved service experience with better overall value.

If you have a minute, please give me a call at 855-396-5450 or just let me know what's convenient for you and I'll call you back. I guarantee the conversation will be brief and can save you hundreds and possibly, thousands of dollars.

Thank you for your consideration. I look forward to speaking with you.

EventTone Wireless
making wireless easy 855-396-5450

The Benefits of Long Term Rentals

Many companies have an ongoing need for quality, industrial grade 2 way radios. Two way Radios can be an indispensable tool, helping your company do its job more profitably and efficiently. Unfortunately, purchasing high quality radio equipment may not always be the best option for your business. Buying involves large capital expenditures, daily maintenance, upkeep and ongoing needs for expensive replacement parts such as batteries, antennas, and accessories. Also, if you need your radios reprogrammed, fees could exceed $200 per hour. Finally, a specific capital expenditure only has a limited deductibility. After a short time the cost will no longer be a tax benefit.

Solution

For many companies, renting two-way radios could be the way to go. Our radio rentals will provide all the features your company needs at pricing that is much easier on your budget. We offer monthly rates that are easy on your budget and can include ongoing repair, replacement for damaged parts, annual upgrading of equipment as necessary and all your reprogramming needs free of charge.

When you work with EventTone Wireless for your radio rental, not only will you get the best rental pricing on quality Motorola & Hytera equipment, you also get a dedicated account manager so you always have one point of contact for everything. In addition to these benefits, we also offer first class technical support to make sure you get the most out of your rental!

Benefits of Long Term Rental

The benefits to a long-term radio rental for your business are numerous. Along with the obvious enhancement to your communications needs, renting your equipment offers several smart features including:

- Easy To Afford Monthly & Yearly Rates
- No Large Capital Outlay
- Ongoing Equipment Maintenance
- Replacement of Damaged or Broken Parts
- Easy Upgrading of Outdated Equipment
- Free Programming
- Continued Tax Deductibility
- Full Time Customer Support
- Free Loaners…No Down Time
- No Hassles

Applications for Long Term Rentals

- Music & Theatre Tours
- Sporting Events Tours
- Hospitals & Nursing Facilities
- Petro Chemical Security & Turnarounds
- Security
- Retail
- Trade Show Organizers
- Event Planners
- Facility Managers
- Maintenance

Would you like to know how a long term radio rental can help your business? Let one of our communication consultants show you how EventTone Wireless can help your company. Call our offices today @ **855-396-5450**

The Next Big Question: Analog or Digital?

Over the past few years, 2 way radio technology has been migrating from, the long time standard of analog radios, to the new technology of digital. Though the technology in digital is superior to analog in many ways, we at EventTone Wireless have not yet jumped on the digital bandwagon. We are not in the analog or digital business. We are in the solutions business. We offer a full array of digital "Mototurbo" portable, 2 way radio equipment, but, the simple truth is, for the vast majority of our clients digital offers many challenges that make it confusing and expensive. In this offering we will try to clear the fog and give you a better idea of the differences between to two systems and which is better for your needs.

Digital Technology

Digital technology offers several advantages to the established analog technology. Many of the digital radios debuting can best be described as a hybrid of a 2 way radio and a cell phone. The signal is digital, meaning it is usually cleaner and can reduce background noise. The transmission is binary, meaning, like a computer, it is in "1's" and "0's." Unlike an analog signal, it can offer more talk paths. Where an analog signal can get more static as you reach the outside edges of coverage, a digital signal will stay clear then just drop out when it reaches its boundary.

There are features such as texting, and unit ID are also available which is helpful with large staff requirements

A digital system can also be programmed to work with a city wide bridging system for wide area coverage that would be difficult with analog technology.

However, there are challenges with digital. First, it is much more expensive, and the technology does require experience the casual user may not have or may not have the time to learn. Also in situations where there may be interference, instead a static signal, as with analog, there is no signal at all.

Analog Technology

If your communications needs do not require city-wide coverage or your staffing is under 75-100 people, then analog is still the best solution for your communications challenges. The technology has been the standard for decades. Most users are familiar with their operation and the coverage, and it is a fast, efficient and cost effective way to communicate.

Also, analog offers many enhanced features. The standard analog coverage is approximately a 1 mile circumference (based on the environment), but it is easy to boost that signal with an analog repeater. It is a simple, inexpensive add on that can help you double your coverage.

Also, due to its lengthy tenure, engineers have developed many tools and devices to improve functionality. If there is something you need your radio to do, it's safe to assume there is a solution to be found.

Conclusion

At EventTone, we've always believed that the right communication is the one that works for you. Our consultants will review your needs with you to determine the right choice for you and your company. We do not have an agenda. We are trying to offer our clients the best solution.

Digital is a great new technology, but it may be too much for you. We are fond of saying it may be like buying a Ferrari because you need to go to the grocery store for a quart of milk. It'll certainly get you there, but it's much more than you may need or want to pay for.

Give us a call @ 855-396-5450 and speak with one of our representatives. They are here to help and make sure you make the right choice for your wireless communications needs.

EventTone Wireless
making wireless easy 855-396-5450

Why Rent???

For the first time ever, you're in charge of the 30 volunteers working your semiannual cross-country club event. With one week to go, you're wondering how you'll be able to communicate with them all, spread out across a 150-acre course- not to mention trying to pay for expensive communication devices on a limited budget.

A security firm has just landed a lucrative contract at several convention centers spread across the United States, but needs a way to share important information with any or all of its officers at a moment's notice.

What is the solution to all of these challenges?

Two way radio rental!

One of the biggest financial drains on any company is its investment in equipment that depreciates or becomes obsolete within the space of 3-5 years, regardless of the amount of money thrown at said assets.

With regard to communication equipment, some items- such as phones, computers and paging systems- must be purchased for use on a permanent basis. But unless Purchasing can reinvent the wheel, these purchases still represent money down the drain.

In addition, how does a company address business-driven fluctuations in staff, and the resultant security, safety, and customer service issues? Purchasing communication equipment that will be used for one week, then set aside for months afterward- only to be misplaced, damaged or stolen before it can be used again- is an expensive way to run a business.

There are few things more vital to an organization's well-being and security than effective and efficient communication. Schools, public safety agencies, hospitals, the agriculture industry, stores, construction sites, and airports are only a few of the many entities that rely on rapid communication for the very existence.

Given the unstable state of the economy, equipment rental has become the best of all possible solutions for companies with shrinking budgets.

- State-of-the-art equipment.
- Small to large area coverage options
- Multiple channel/frequency options
- Calibration of frequencies to match your existing equipment.
- Local and/or coast-to-coast capability, depending on your business needs.
- Temporary repeater installation in buildings where dead spots normally occur.
- Zero maintenance cost.

Two-way radio has come a long way since its first use by police departments in the early 1930's. In equal measure, the more recent transition from analog to digital signal represents a quantum leap forward in features, capability and efficiency.

In much the same way, two-way radio rental offers businesses and individuals' substantial savings in money, time and resources that equipment ownership never will.

Let EventTone show you the options you have available. Give us a call today @ 855-396-5450 or check out our website @ www.eventtone.com

Sellsy
CRM Manual

Managing your business contacts

Sellsy is a comprehensive tool to manage your business contacts: clients, prospects, suppliers, contacts...

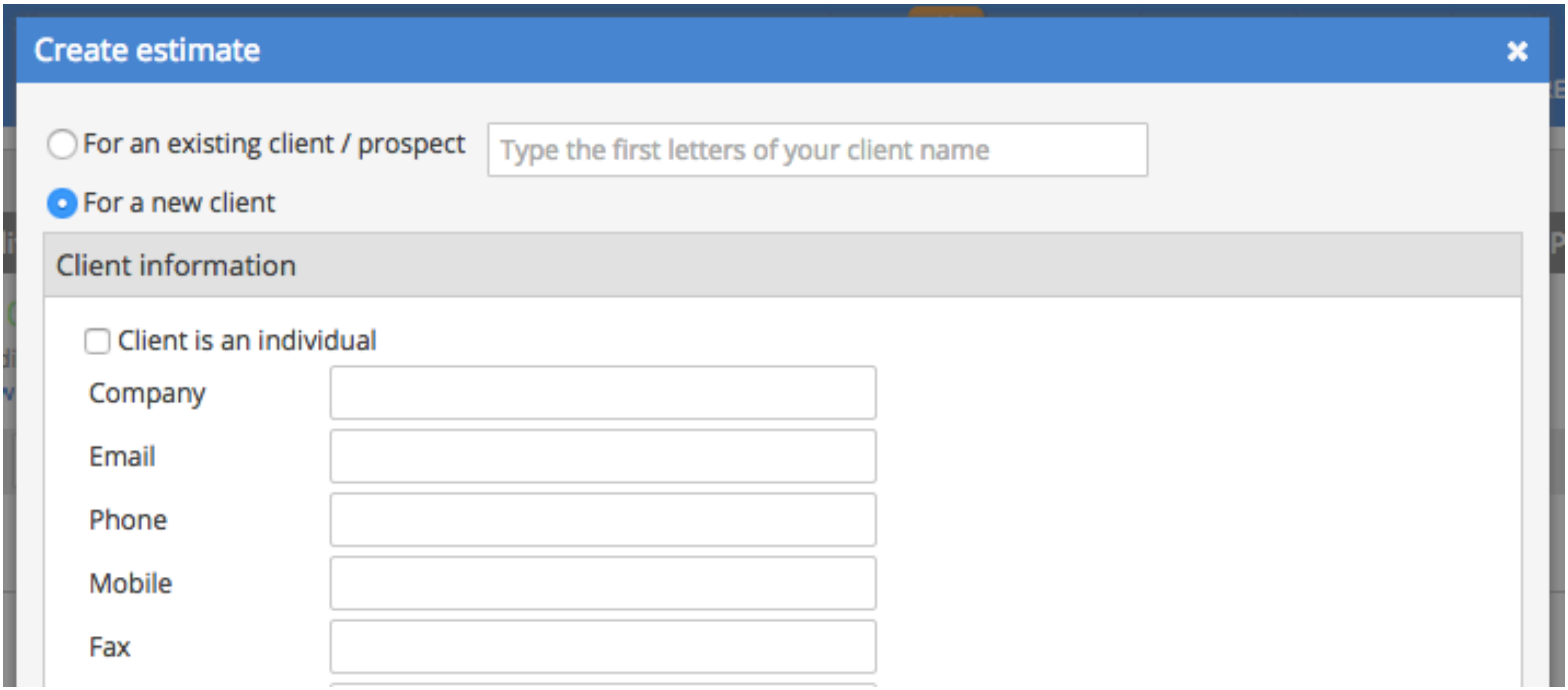
You can easily track your customers, set reminders, and store notes about the contact history of each customer.

This section gives you directions on how to optimize your customer relationships with Sellsy's powerful features.

How do I add a client?

You have two options for adding a new client.

First, when you **Add a new document**. You can directly create a new client in the window that appears,:



You can also click on **Contacts,** then **Add client**. Complete the form and save it at the bottom of the page.

The principle is the same for Prospects (if you use the CRM unit) and Suppliers (if you use the Purchase and Margins unit).

You can always change your clients' data, add an address or an additional contact from the **Contacts** menu.

How do I import client records?

Sellsy offers a powerful interface to manage your data imports.

To import companies or contacts, click **Settings** then **Data Imports**.

You then arrive in the import management page, which will give you access to the history of your imports. Click **Import Data**.

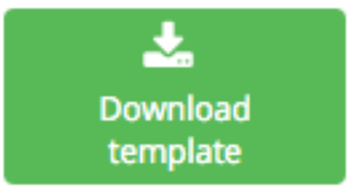
You can then choose what type of data you want to import:

- Companies: Billable legal groups
- Individuals: Billable legal individuals
- Contacts: that can be connected (or not) to a company

When you choose the desired type of import, the system will display all kinds of fields that can be imported:

#	Column	Required?	Value
Company data			
1	Sellsy company id	No	Free, unique id from a Sellsy export.
2	**Company type**	**Yes**	**Value : 'client', 'prospect', 'supplier'**
3	**Company name**	**Yes**	**Free**
4	Company reference	No	Free, email format
5	Company legal form	No	Free, email format

Note: fields in bold are required fields for import.
Important: to simplify the preparation of your file, you can download a blank template containing all the expected columns in your account.



In the next window, you can configure your import.

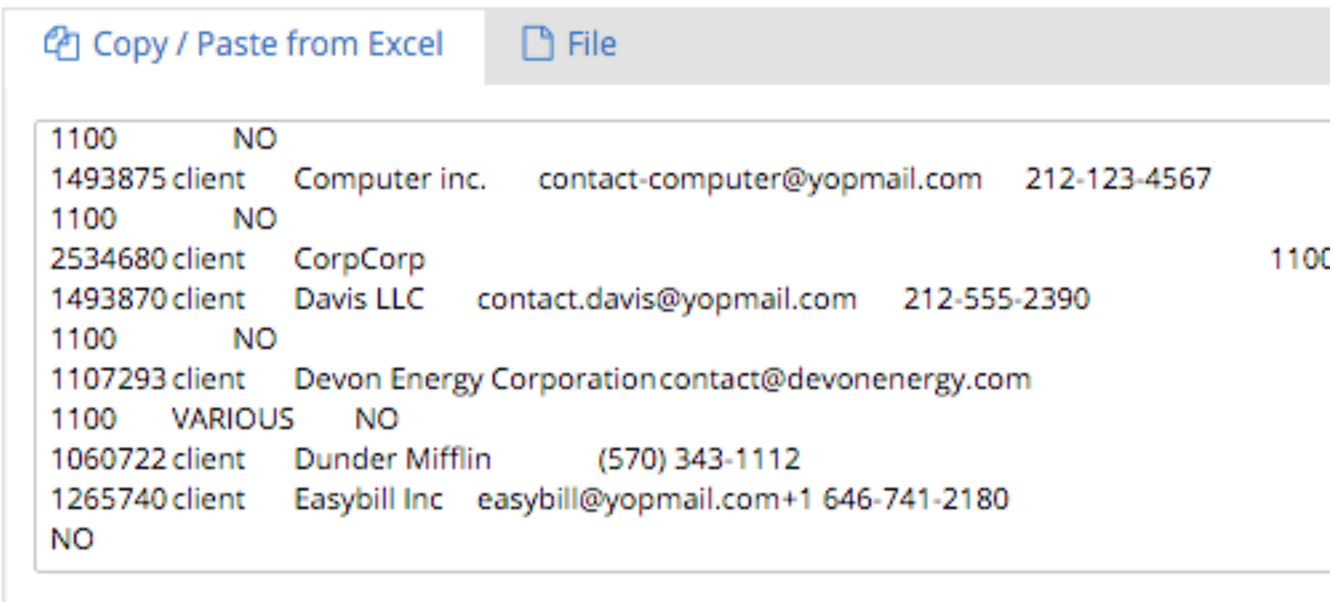
Import your data in the interface

You have two options to upload your file:

Copy / paste from Excel:

This is the preferred solution because it avoids any risk of error with file encoding. If your file is okay in Excel (or other spreadsheet), it will be okay in Sellsy.

To use this feature, just select your data in Excel and then paste it into the box that is presented to you:



Right after you paste it, it will be unclear and unstructured, but do not worry, this is normal. It will display correctly after it is saved in Sellsy.

Import a CSV file

The alternative is to import a file that you have prepared in CSV format.
In that case you can choose the type of file column separator (usually the comma in English versions of Excel) as well as encoding (we advise you to always favor UTF-8 encoding for your imports).

Preparing your data for import

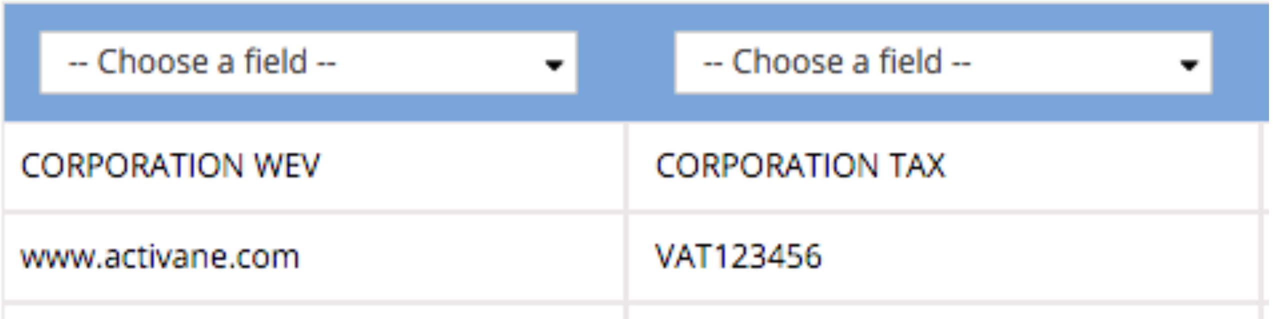
Once your data ready, click **Analyze Data**.

Your data is displayed in columns.

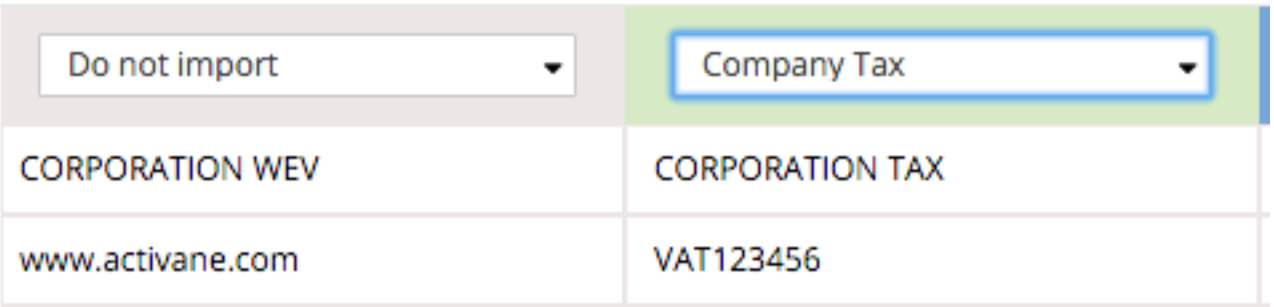
Display 10 elements

Sellsy company id	Company type	Company name
ID	CORPORATION TYPE	CORPORATION NAME
1003989	client	Activane
1886708	client	AMWPR
1493874	client	Brown Corporation

The **green** columns were directly recognized by the system; there is nothing more to be done.
When a column is **blue** it means that the data was not recognized:

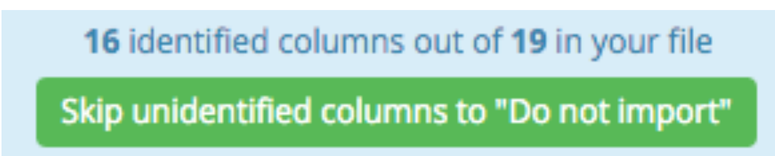


By clicking on the drop down menu you can choose not to import the column (which is displayed in **gray**). You can also choose one of your existing fields in Sellsy, and the column will then turn **green**.



When all your columns are **green** or **gray**, you can import your file.

Note: You can manage the selection of the columns with one single click, above listing, if you are okay with only importing the columns that ready.

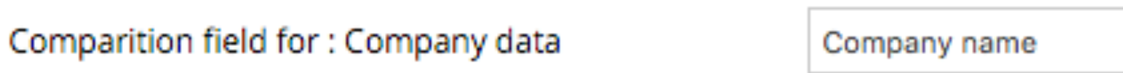


Advanced options: updates, conflicts...

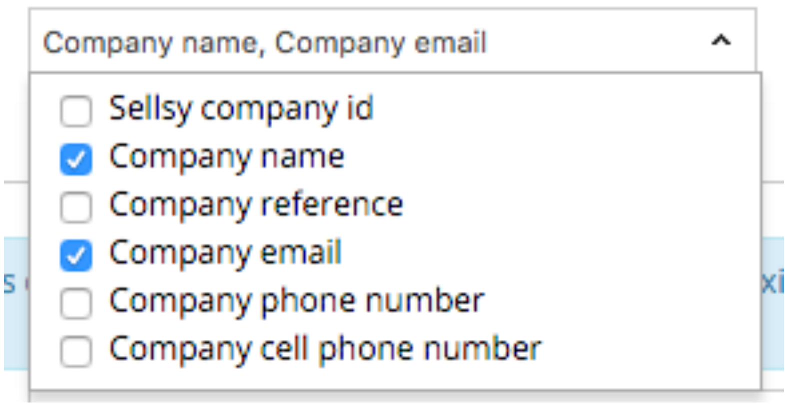
Before importing your data, you can set a number of parameters if your file is an update of your existing Sellsy file.

Select the comparison fields

The comparison fields allow you to check if data already exist in your account and update it accordingly. For example, if you want to update the company ACTIVANE, you can tell the system to recognize it:



Several types of comparison fields are available:

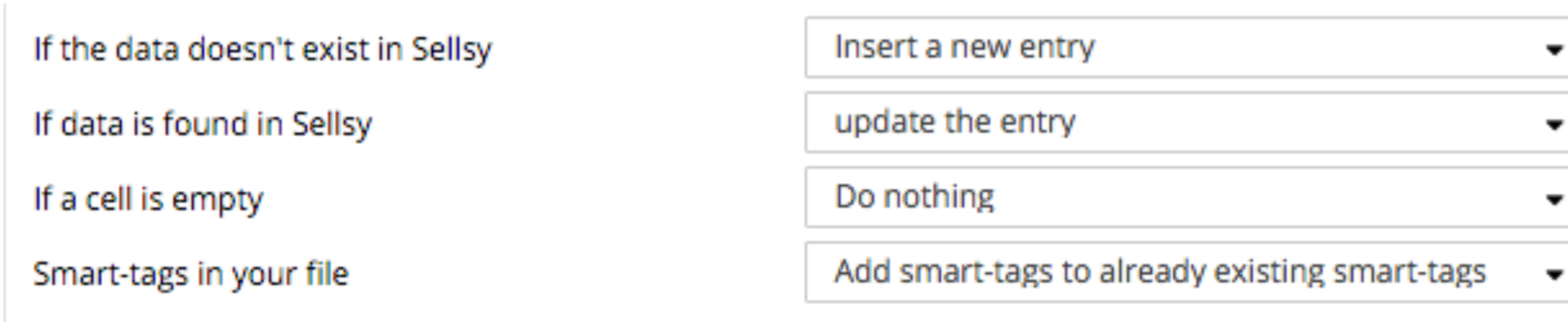


Important: If you choose several comparison fields, the system will find comparisons only if all the fields are found. Otherwise, a new record is inserted.

For example, if you changed the name of a company, do not choose this field for comparison.
Good to know: Sellsy identity numbers are automatically created when the object itself is created in Sellsy. So you can only recover that information with an existing data export. Do not fill this column when you import new data.

Update Actions

These actions allow you to choose what to do when a match is found.



If the data does not exist in Sellsy, you can choose to insert a new record or not.
For example, if you import an update and the file contains a company that does not already exist in your account, you can choose to create it or not.

If the data is found in Sellsy, you can choose to update the record or not.

If a cell in your file is empty, you can choose to overwrite the value or not.

For example, if a phone number has been entered in the Sellsy contact but not in your update file, you can choose not to change existing data in your account.

Finally, **for smart tags**, you can choose either to merge smart tags in your file with existing smart tags on Sellsy, or replace them completely.

Custom fields import options

Similarly, you have options on what to do for custom fields.

If a mandatory custom field is empty, you can choose to import the line leaving the required field empty or not to import the line.

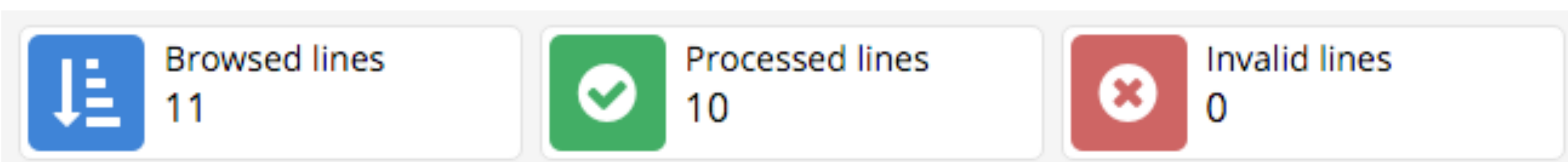
If a list type value does not exist, you can choose to create it or not.

For example, if you have a custom field list containing the values North, South, and East on Sellsy and your import contains the value West you can choose to automatically add the value to your custom field.

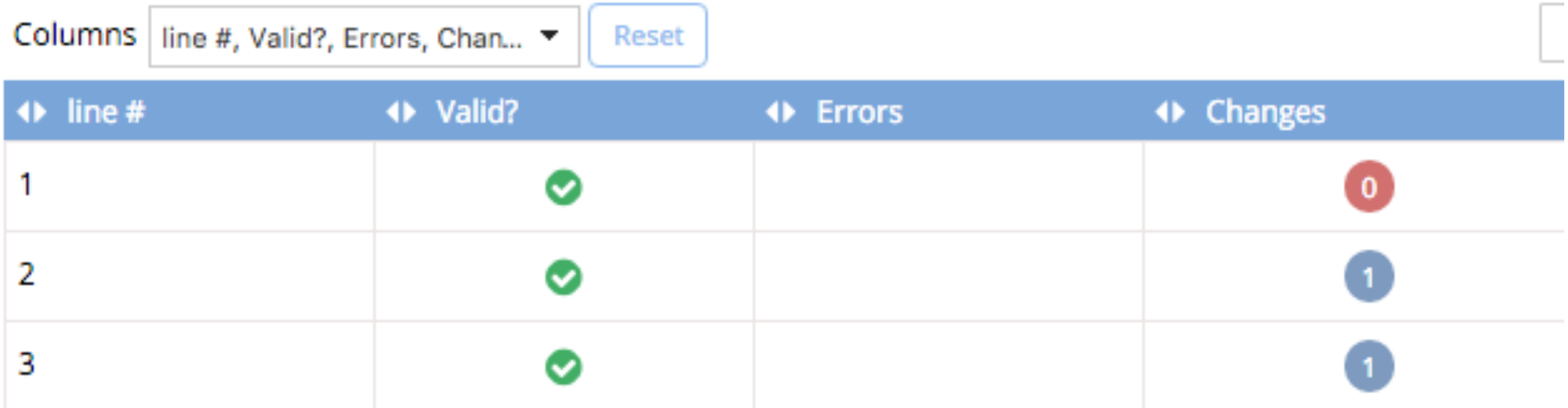
If a custom field cell in your file is empty, you can choose to automatically add the default value defined in your account, or do nothing.

Track your import and possible actions

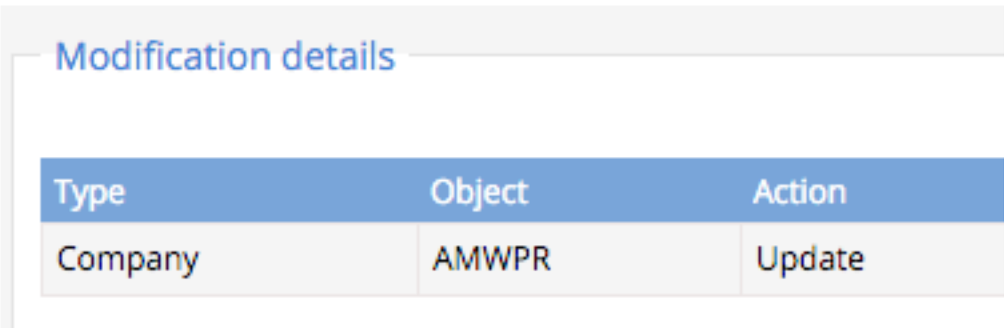
Your import is now running, you are redirected to preview your import.
During treatment, your import is marked as waiting for processing.
In the same place you will find the characteristics of your import.
When your import is processed, you receive an email alert and import result data is displayed:



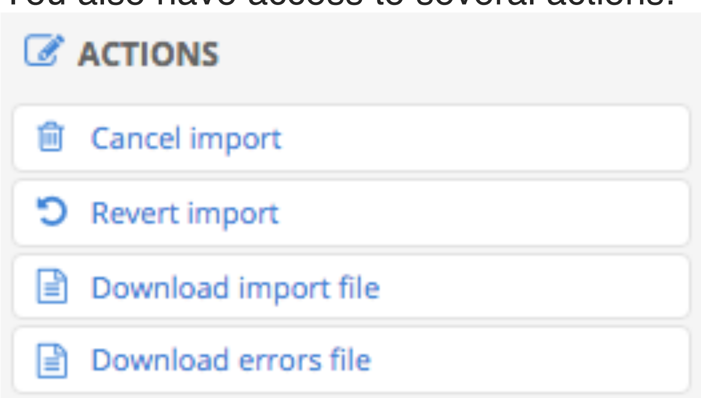
The **Changes** tab lets you check the actions for each line:



If you right-click on a line you can access the details of the changes for the line:



You also have access to several actions:



The first button allows you to **cancel the import** before it is processed by the system.

The second allows you to **cancel the changes** and roll back to the original state before import.

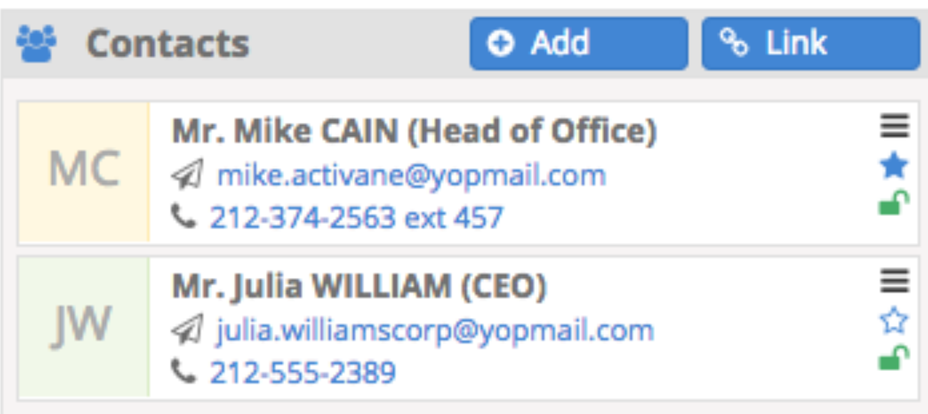
The third allows you to **download the import file** in Sellsy format.

Finally you can **download the error file** to check lines that have problems.

How do I add a contact to a client?

To add a contact to a client's record, click **Contacts**, then **Clients list**, select the client record to which you want to add one or more contacts.

The client's record appears. The contacts are located in the left bar.



Click **Add** and fill in the fields provided.

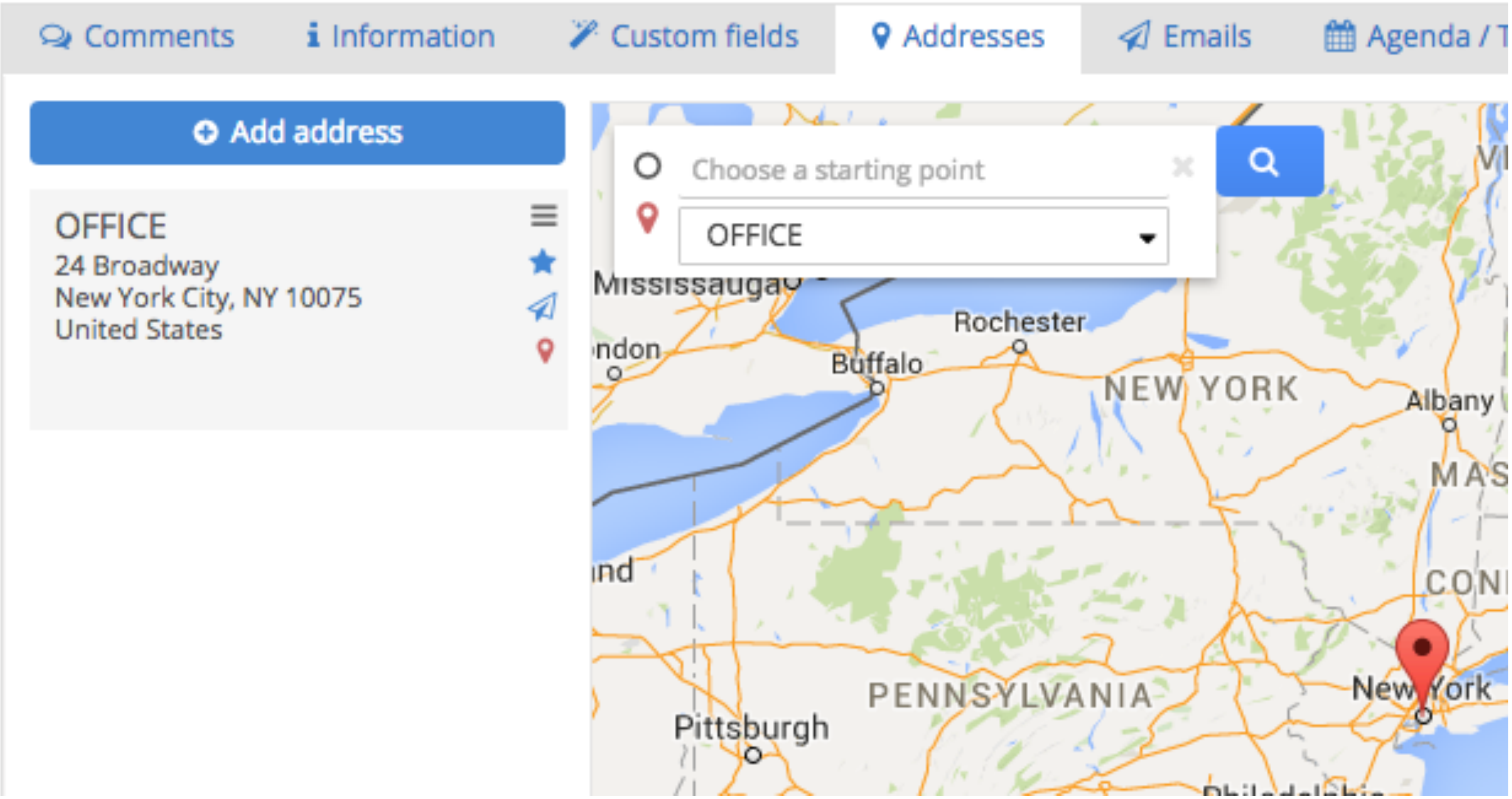
If you want to add multiple contacts, select **Add** again and repeat as many times as necessary. Save the changes, and the record is up to date!

Note: You cannot add contacts to a record created as an individual.

How do I add an address to a client?

To add an address to a customer record, click **Contacts**, and then in the list, select the customer record on which you want to add one or more addresses.

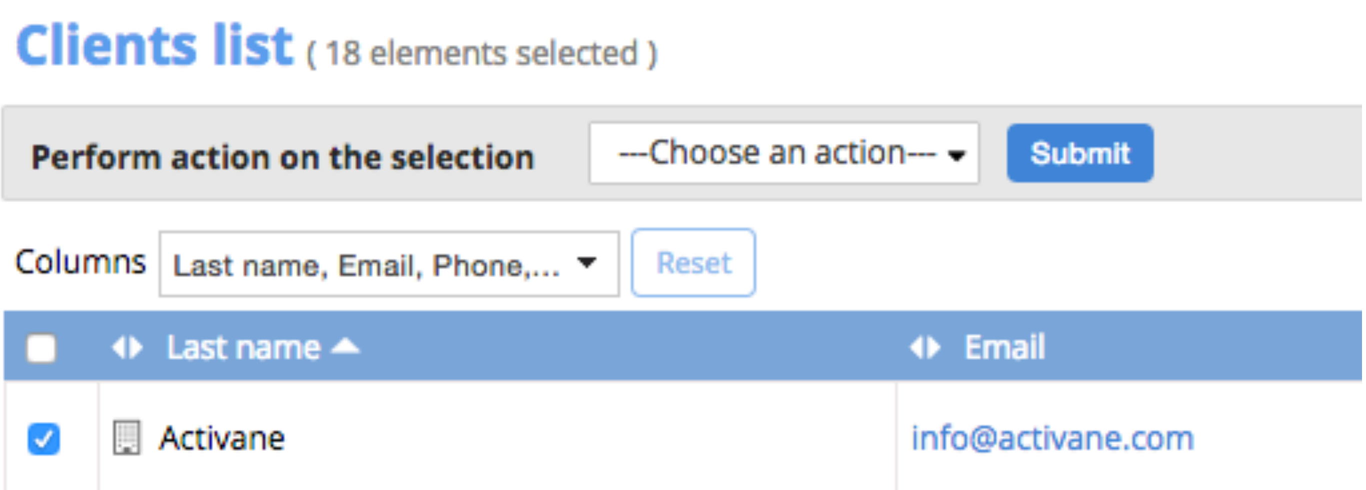
The customer record appears. Locate the Addresses tab:



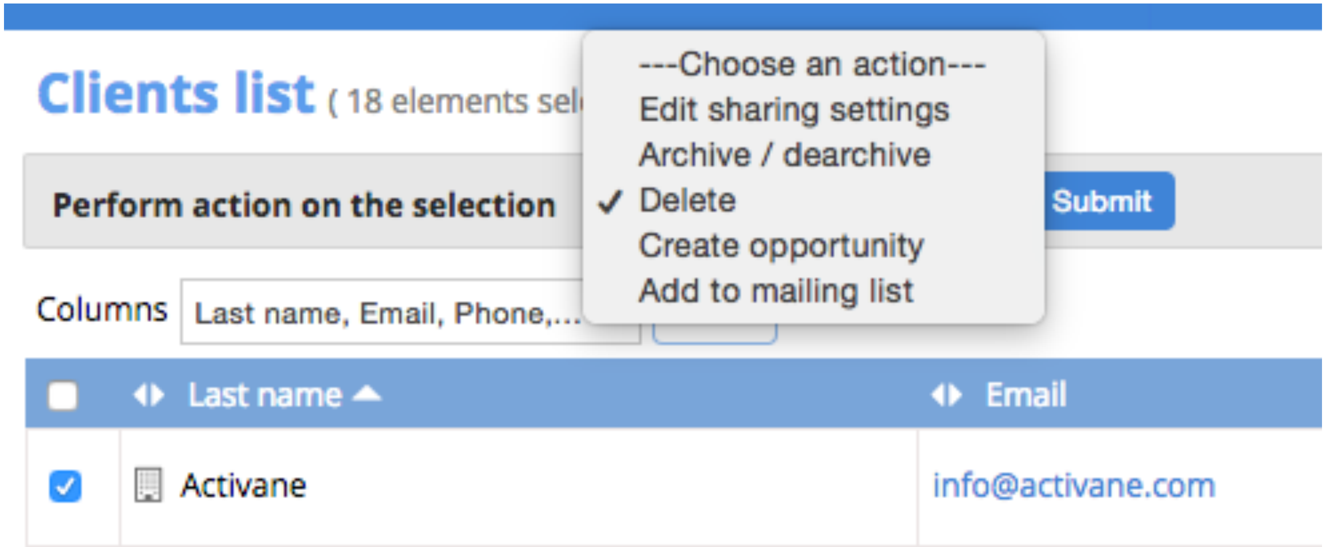
Click **Add address** and fill in the fields provided.
If you want to add multiple addresses, select **Add address** again and repeat as many times as necessary.
Save your changes and the record will be up to date!

How to delete contacts?

If your account has inactive clients or if, for example, you imported contacts by mistake, you can easily delete them in bulk.
To do so, go to the right list (clients, prospects, suppliers, contacts...).
Check the right box on the left of the list:



Note: you can select the entire page by checking the box on top of the list.
Then click on **Delete**:



Confirm, and your clients will then be deleted.

CRM (Sales Opportunities) unit

The CRM unit allows you to easily manage and keep track of your business opportunities.

Create opportunities/prospects, and define the stages of your sales pipeline so you never miss a deal.

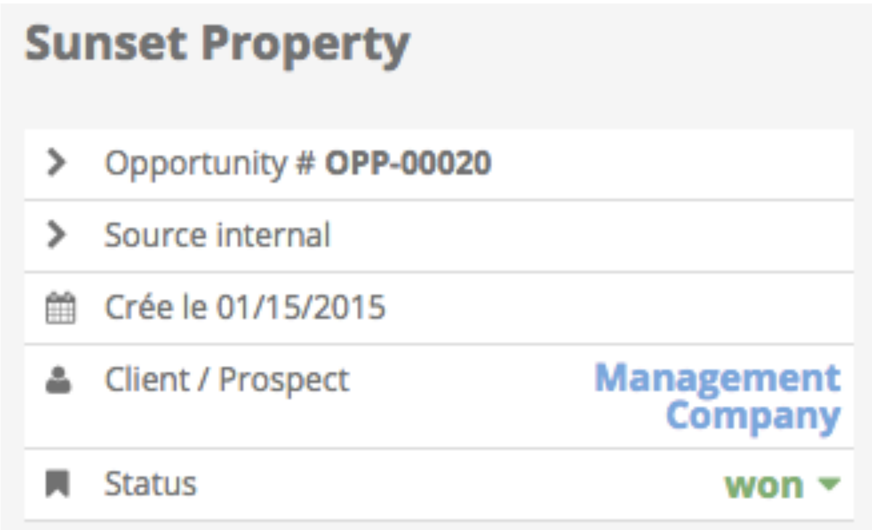
Easy to implement and fully integrated with your billing system, the CRM unit allows you to substantially increase your business performance.

CRM general concepts

The CRM add-on allows you to manage your business opportunities while prospecting for potential customers with whom you have yet to start a business relationship.

This module is based on the concept of an opportunity. An opportunity consists of the following information:

Retail opportunity:



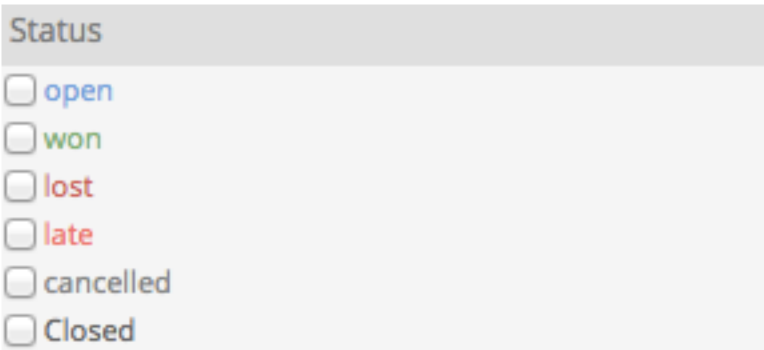
Segmentation

A contact, which can be either a prospect or a client.

A prospect is a potential business partner. **At any time, you can turn a prospect into a client** (by creating their first invoice, for example).

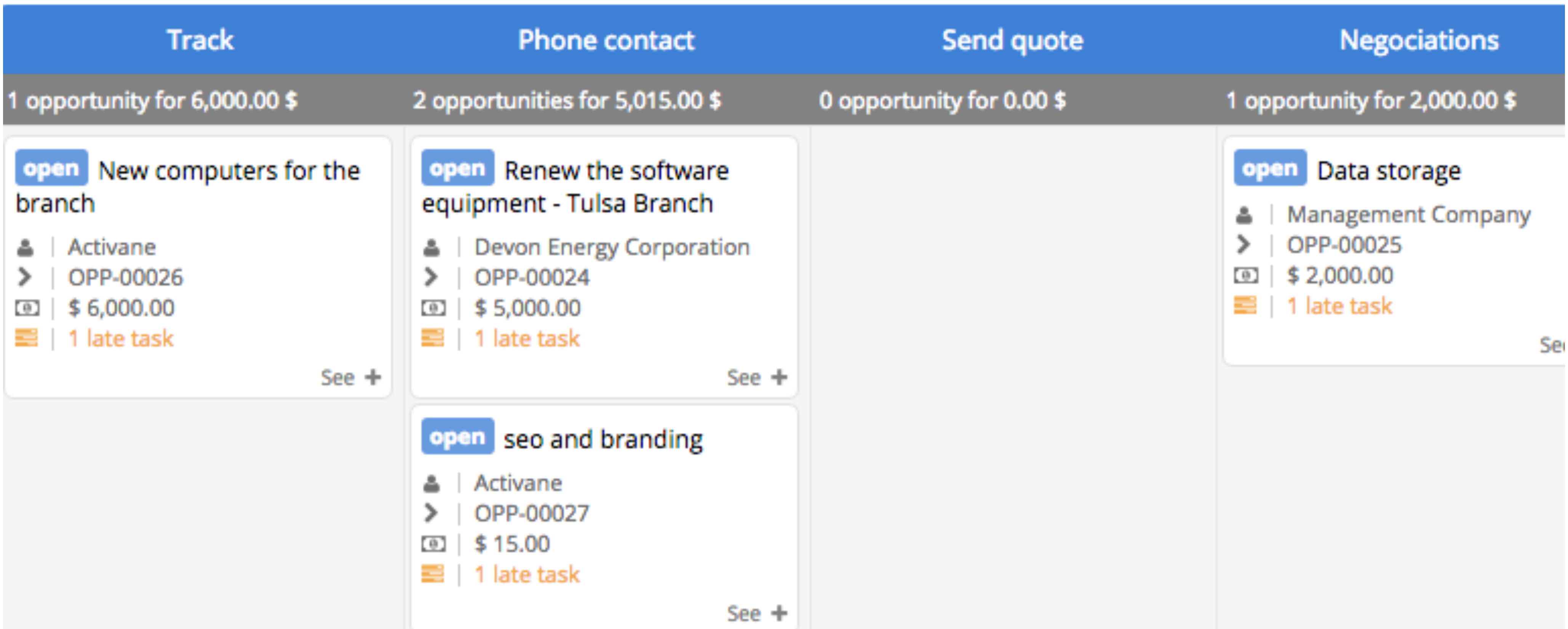
Source: This is the origin of your prospect in the file. Examples of sources include but are not limited to: by email (email outreach you originally made with them), the contact form from your website, or a conference.

Status: The status of an opportunity can be open, won, lost or cancelled.

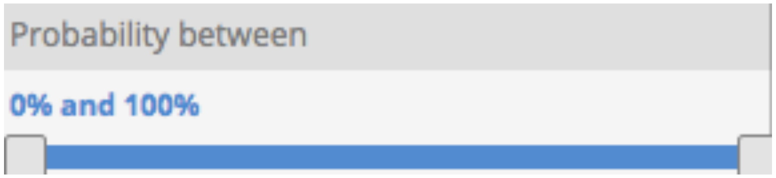


Potential: This is the amount of potential revenue a contact would represent either before or after tax.

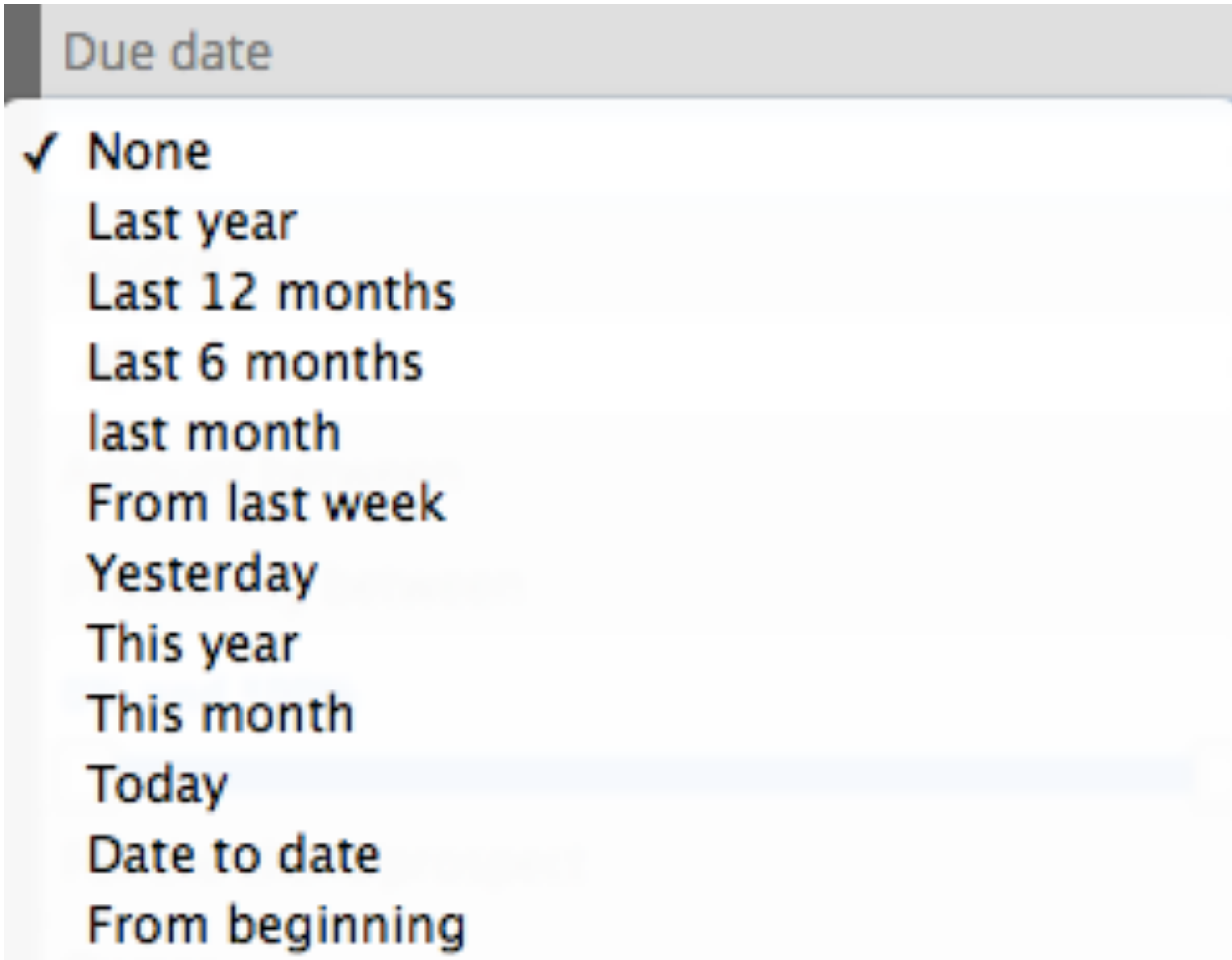
Pipeline: A series of steps that visually represents your sales process. You can create multiple pipelines. For example, you can create a pipeline based on your sources.



Probability: Percent probability of a closed sale at each step of your pipeline.



Due date: The projected completion date of the opportunity.



Creating a sales pipeline

A sales pipeline is determined by the training that your company follows for their sales channels. If a sales process or protocol is already in place at your company, it is advised to create the same steps as pipeline tabs in the CRM add-on. A small example of a pipeline (with few tabs) is:

Call > Sending brochure > Sending quote

Each (opportunity) step is associated with a probability, all which allow you to easily filter opportunities by degrees of probability later.

To create your first pipeline, click **Settings > Sellsy Add-on > Opportunities.**

Select the **Pipelines** item. The only pipeline in the list is the default pipeline.

When you modify the "default" pipeline, you can see the different steps:

Click **Add a pipeline**.

In the next window, set your steps and probabilities:

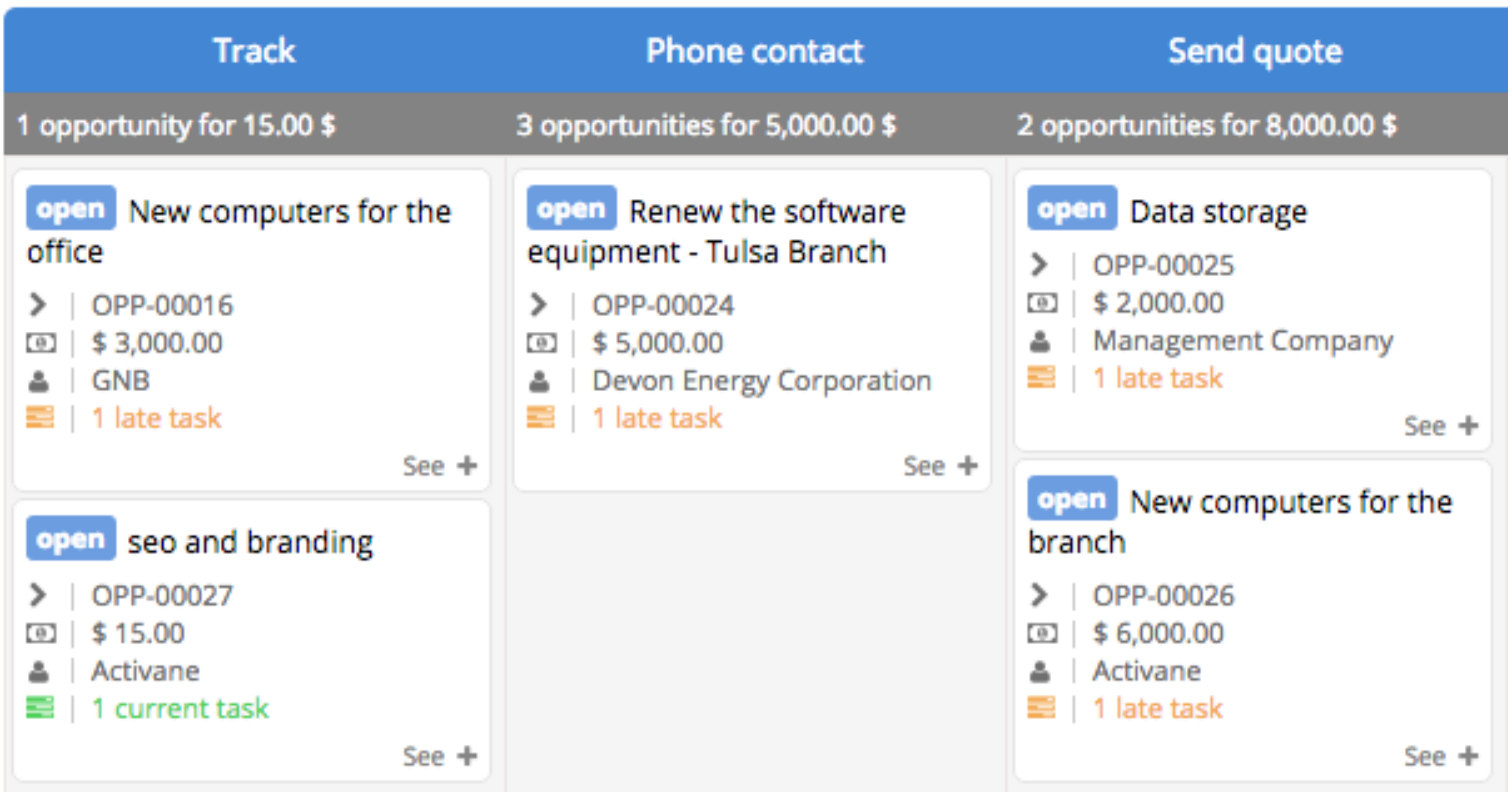
Save your pipeline and set it as the default pipeline.

Now you will find your pipeline in **New Opportunities:**

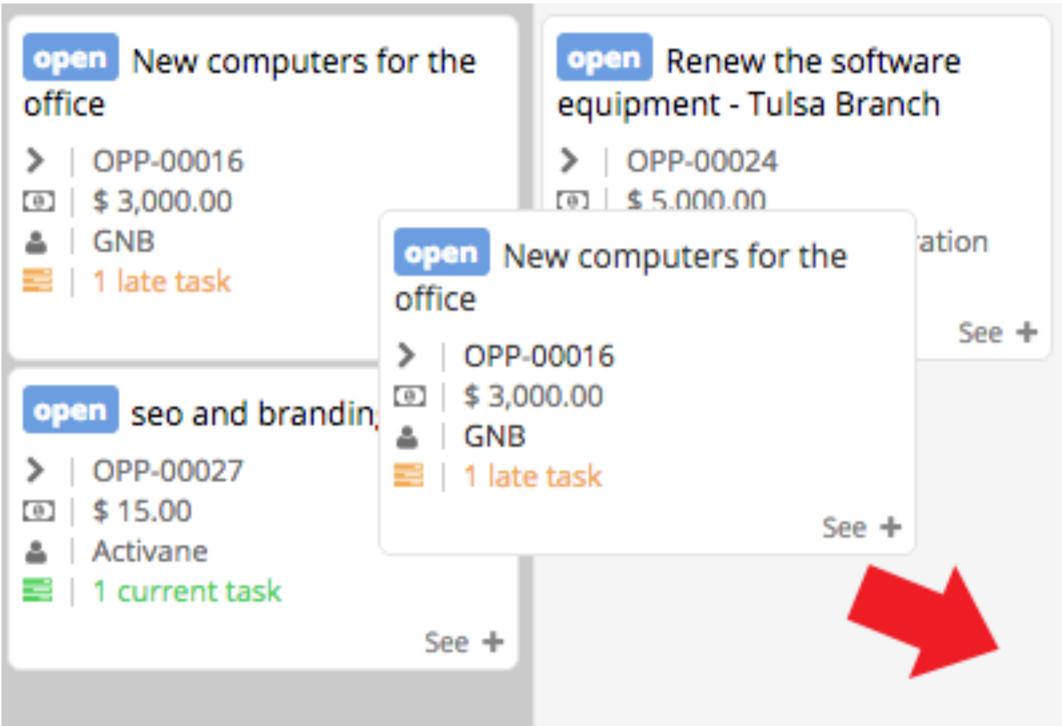
You can simply move from step to step and maintain your customer follow-up efficiently.

How do I use the pipeline view?

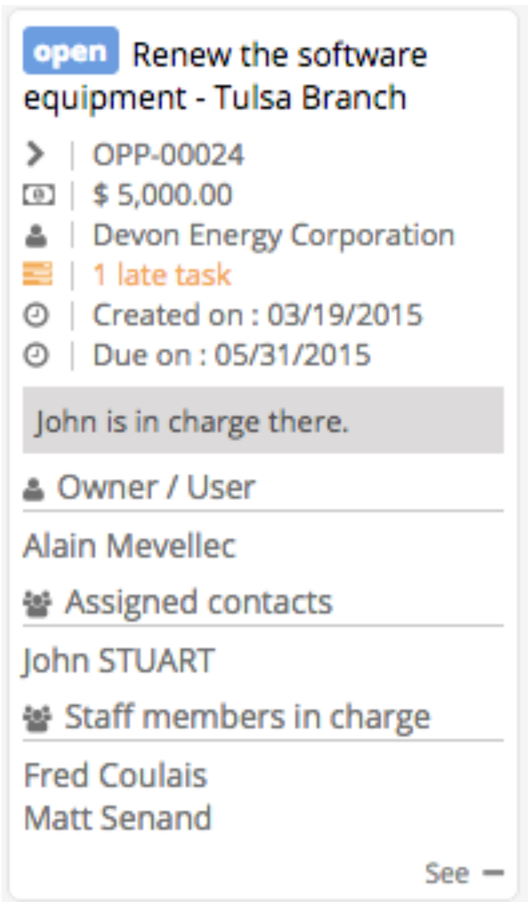
Sellsy offers a view of your pipeline to help you easily manage your opportunities.
To access it, click on **Opportunities** and then **Pipelines view**.
The pipeline view will then appear:



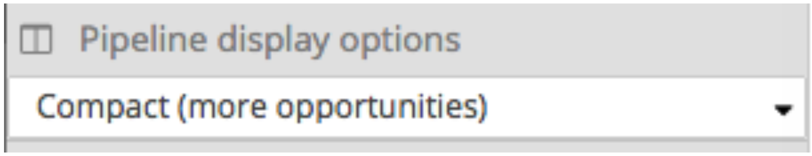
For every step of your pipeline, you can see the opportunities in progress.
The total of each step is calculated and a summary of each opportunity will be displayed.
You can move an opportunity from one stage to another by simply dragging-and-dropping:



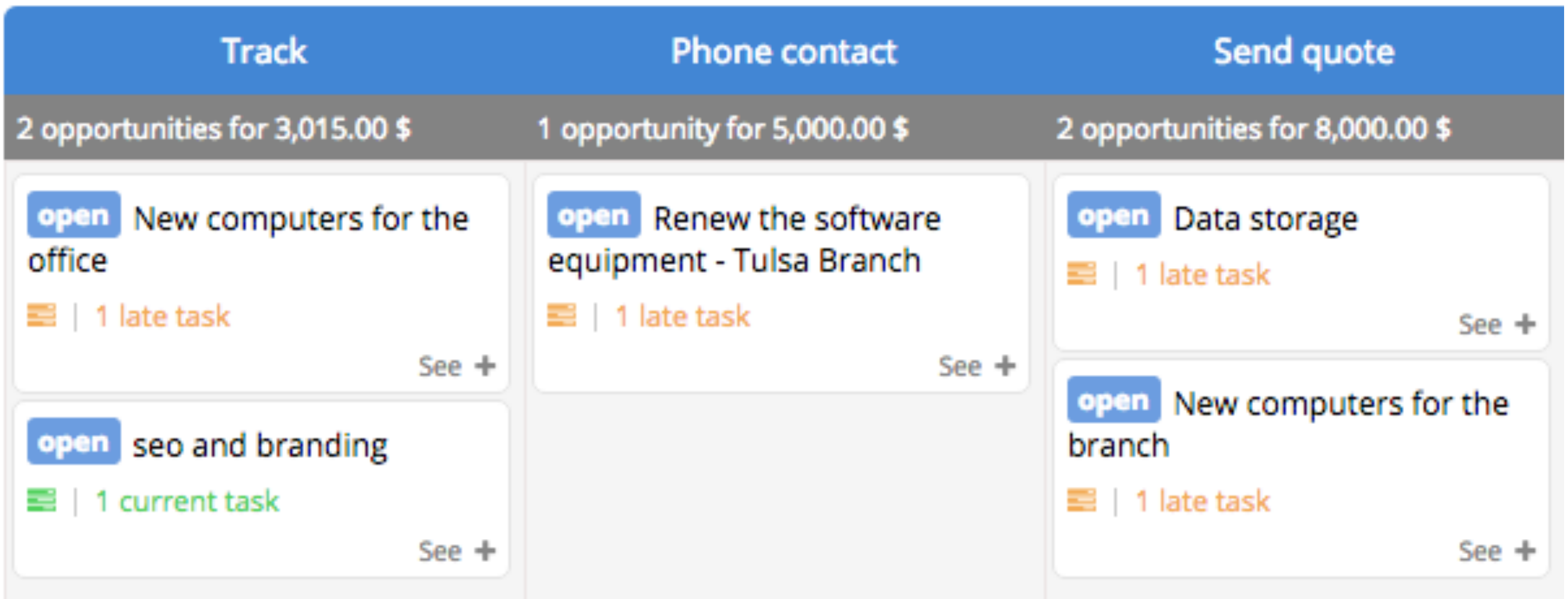
A task's status is displayed for each opportunity.
By clicking on See + you'll get even more details:



To display the detailed record of an opportunity, click on the name and a summary will appear.
If you want a less detailed view to show more opportunities, you can do so with the filters on the left of your screen:

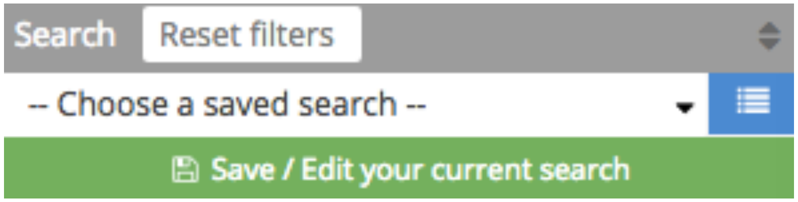


The display will then be simplified:

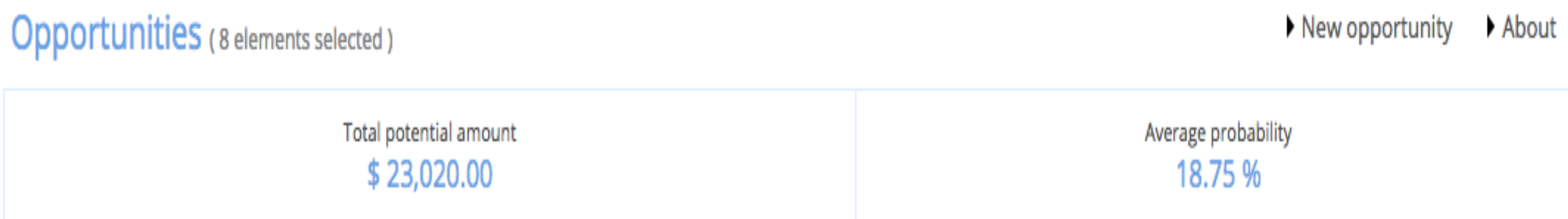


How do I filter opportunities?

The power of opportunity management lies in the ability to quickly filter and isolate a specific type of opportunity for marketing purposes (callbacks, email campaigns, etc.). Filtering is done in the same manner as all other Sellsy lists (from the search module on the top left of the page):



You can easily filter your opportunities by status, date, prospect, client, source, pipeline, and staff. Two buttons allow you to select a range of probability percentages.
The opportunities list is updated in real-time and dynamically displays the total potential revenue on the right of the screen:

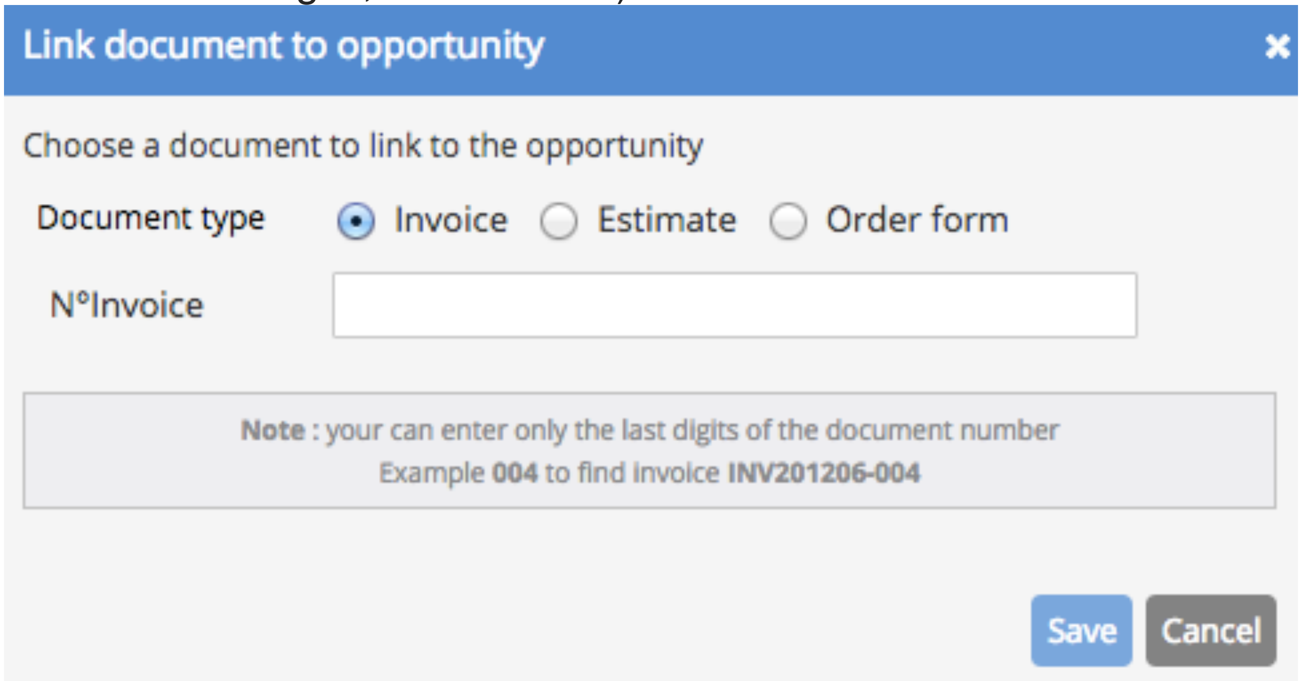


How do I attach documents to opportunities?

Sellsy allows you to attach documents to your opportunities so you can directly find invoices and estimates concerning the opportunity. Another advantage to attaching documents is that it gives you the ability to **control the difference between the actual amount on the invoice and the initial estimation**.

To attach a document, click on **Link sales document** in the opportunity form.

In the following window, please choose the document type and enter the document number. (Tip: you can enter the last digits, such as 010).



The document is then linked to the opportunity:

Document	Status	Document number	Date	Client	Amount Excl. Tax
Invoice	Paid	INV-20150319-00219	03/19/2015	Management Company	$ 2,250.00

The total amount given by document type will appear and can be compared to the initial potential.

Using tasks to manage opportunities

To efficiently manage your business opportunities, you need to keep track of them over time with reminders and actions.

To be able to view the status of your various tasks and opportunities that are unfinished, a status code is displayed on the list of opportunities:

10

Due date	Proba	Potential		Owner / User	
06/30/2015	0 %	$ 0.00		Nick Claquin	
01/31/2015	70 %	$ 10,000.00		Nick Claquin	
06/30/2015	0 %	$ 5.00		Nick Claquin	
N/C	0 %	$ 0.00		Nick Claquin	
05/31/2015	40 %	$ 5,000.00		Alain Mevellec	
06/30/2015	0 %	$ 2,000.00		Matt Senand	
07/31/2015	0 %	$ 6,000.00		Nick Claquin	
07/24/2015	20 %	$ 15.00		Matt Senand	

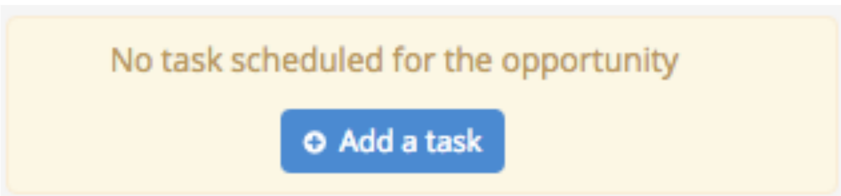
A legend of color codes can be found as follows:

- **Green circle:** A task is defined and still needs to be completed
- **Red circle:** A task has been defined, and it is now considered late/delayed
- **Warning:** No upcoming task has been defined

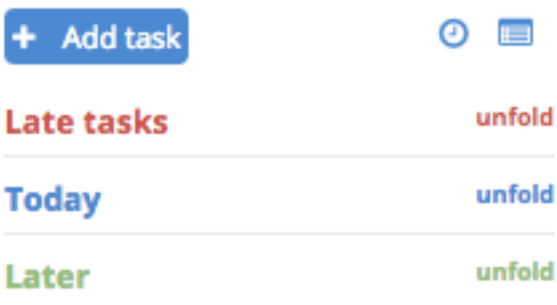
With these indicators, you can easily see what opportunities require action.

How do I add a task?

To add a task to your opportunity in alerts, you can click the alert icon directly in the listing. Otherwise, from your opportunity page, click **Add Task** on the right-hand panel.



A calendar view is available with task overview :



Estimates, invoices, and business documents

Sellsy allows you to do much more than just create invoices. Sellsy can meet a variety of needs.

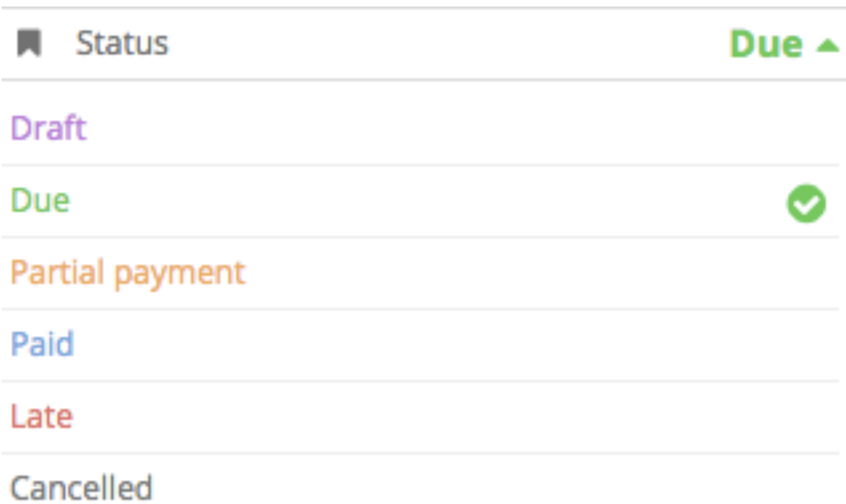
In this section, discover the many possibilities of customization allowed by Sellsy.

You'll also find tips that can save you time in your every day usage.

How do the documents status work?

Every sales documents on Sellsy has its own range of status based on their progress within the sales process.

Those status are different from one document to the other. Here are the status available for an invoice:



The main advantage of the status is to get the information quickly and easily. A common example is to be able to filter the late invoices to send a reminder to your clients.

Most of status change are automatic. For example:

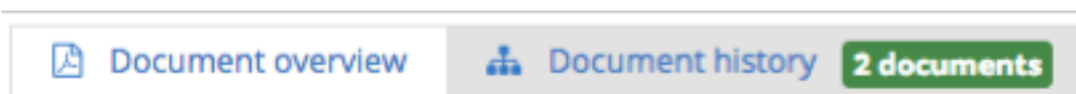
-Recording a total payment in an invoice will change the status to **Paid**.

-Sending an estimate by email will change the status to **Sent**.

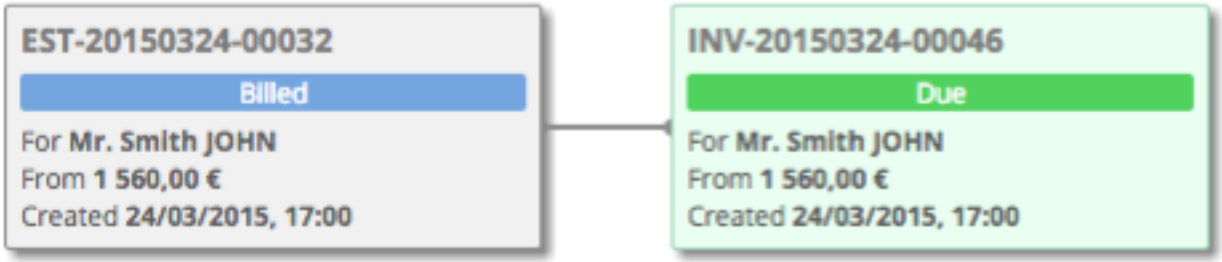
-Canceling an invoice with a credit note will change the status to **Canceled**.

On the same note, the change of status between two linked documents are also made automatically.
A simple example is the transformation of an estimate to an invoice, which will change the status to **Billed**.

At any moment, you can check the links between the documents and their status by clicking on **Document history** from the document overview:



The tab will then display all the documents and their status:



Specific cases and complex scenarios

In some cases, the system can't determine by itself the status of the parent documents, as the concept of status is solely based on the notion of balance.

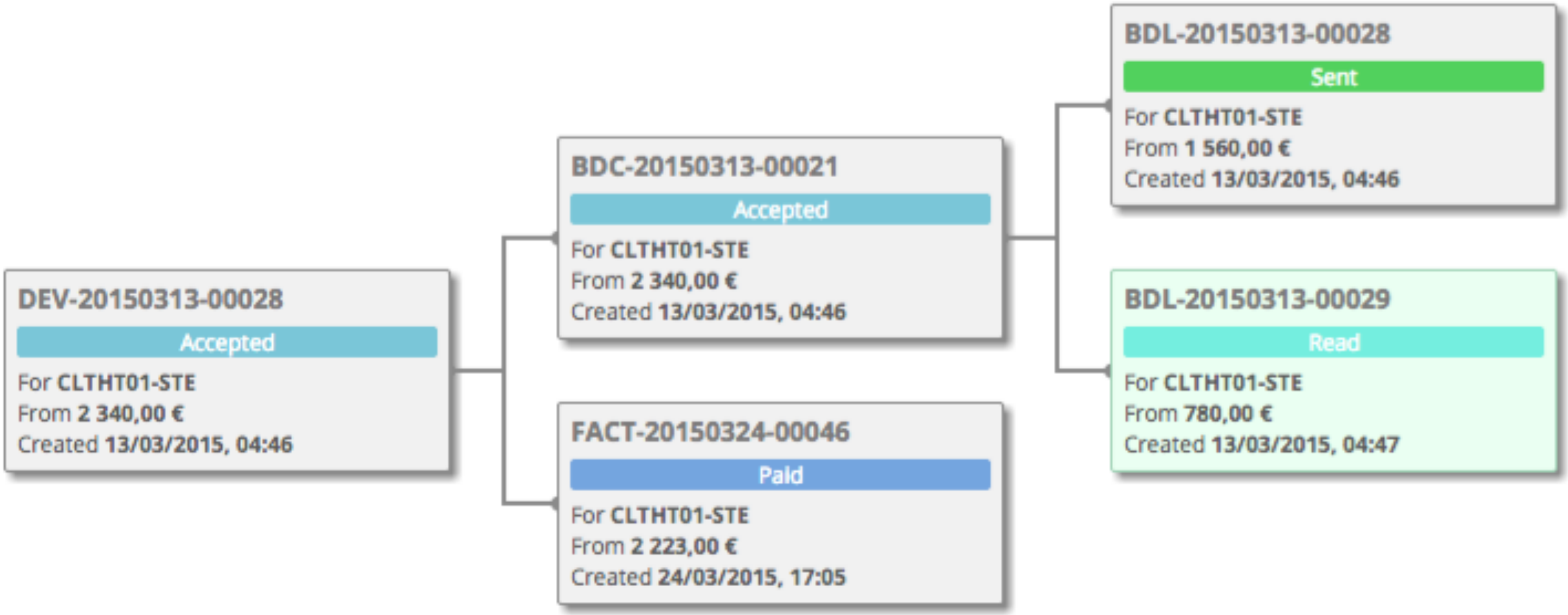
For example, if an estimate was converted into slightly different invoices (with a discount, for example), the total of the invoices is different from the estimate amount.

In that particular case, the system will ask you which status do you want to give to the initial documents.

Note: this alert will be displayed if the total amount if the total amount if lower or exceeds the amount of the parent document (the estimate in this example). These rules apply for the entire chain of documents.

You can also, from one single estimate, generate several delivery forms, then several invoices.

Once again, for a clear overview of your documents chain, click on the **Document history** tab.

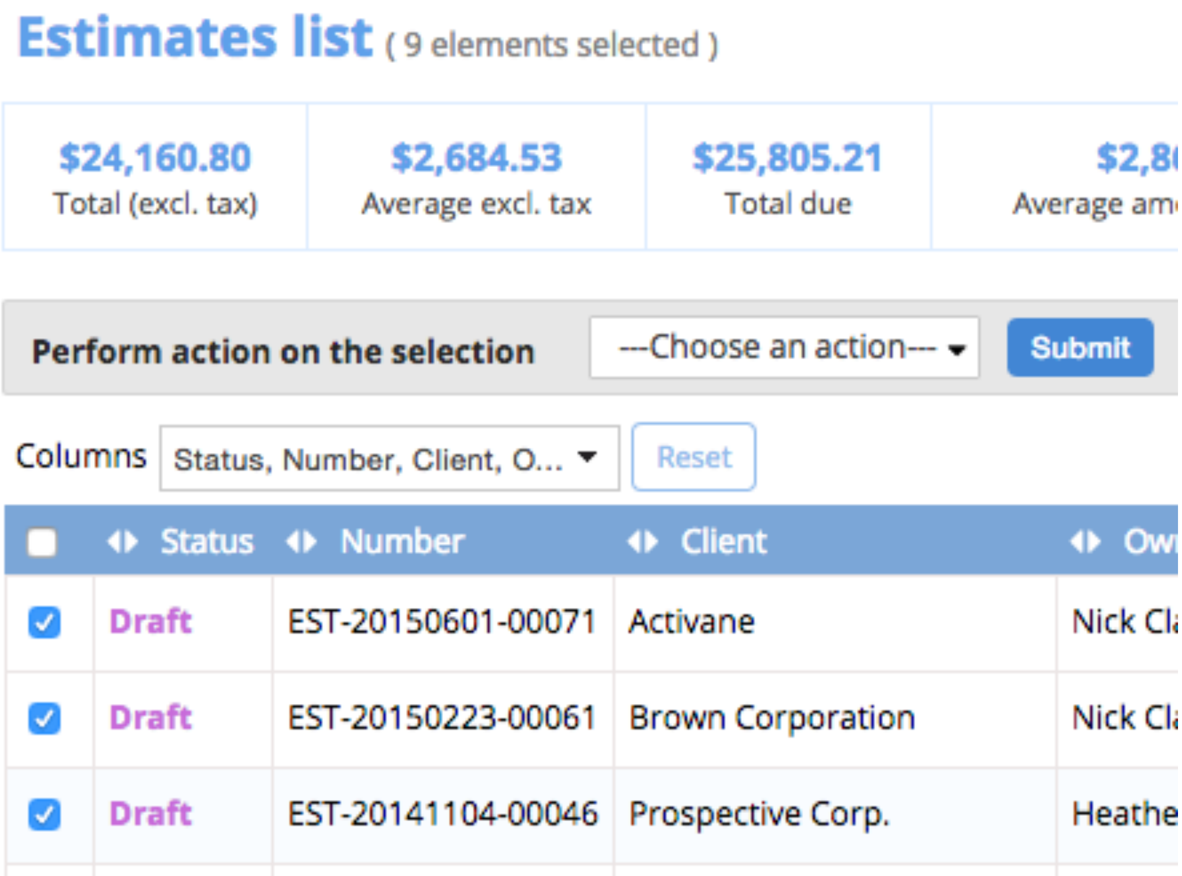


Edit documents status in bulk

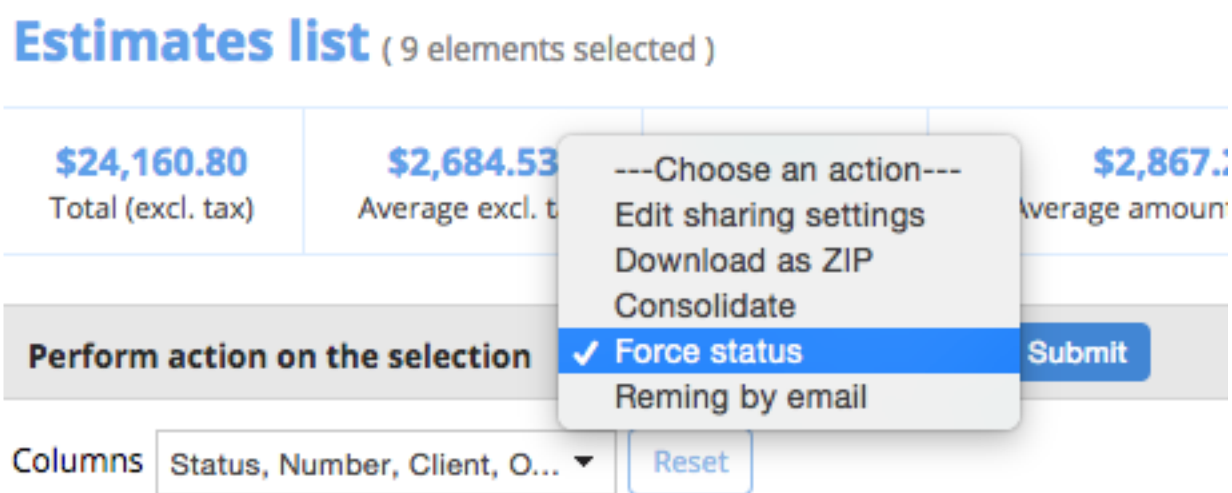
Sellsy allows you to edit the status of your documents in bulk.

Example: you can switch several estimates from the **Sent** status to **Accepted**

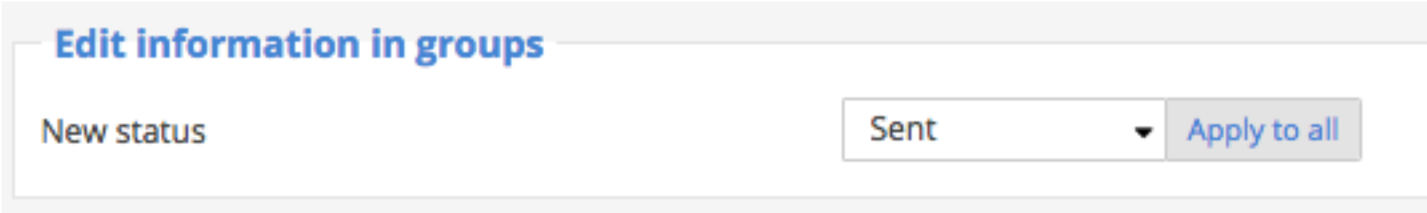
To edit the status of several documents at once, you have to select them from the right listing, here the estimates:



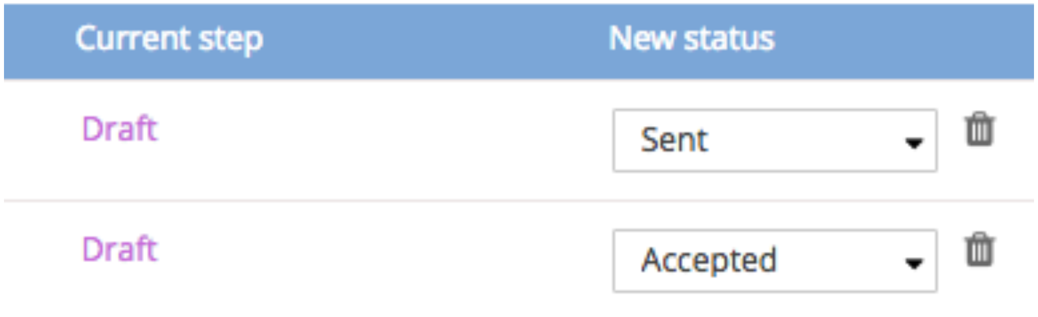
Then click on :



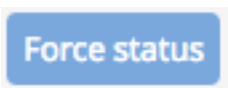
If the documents have the same status, you edit them all at once:



Otherwise, or if the status is not the same, you can edit the status for each document:



Then click on Force status:

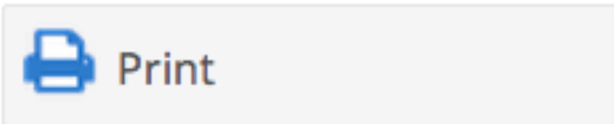


The status of your documents is now updated.

Important: some status changes are impossible or not compatible between them. In that case, you are warned by the confirmation window.

How do I print my documents?

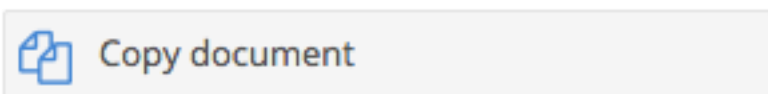
Open the document you want to print, then click **Print**.



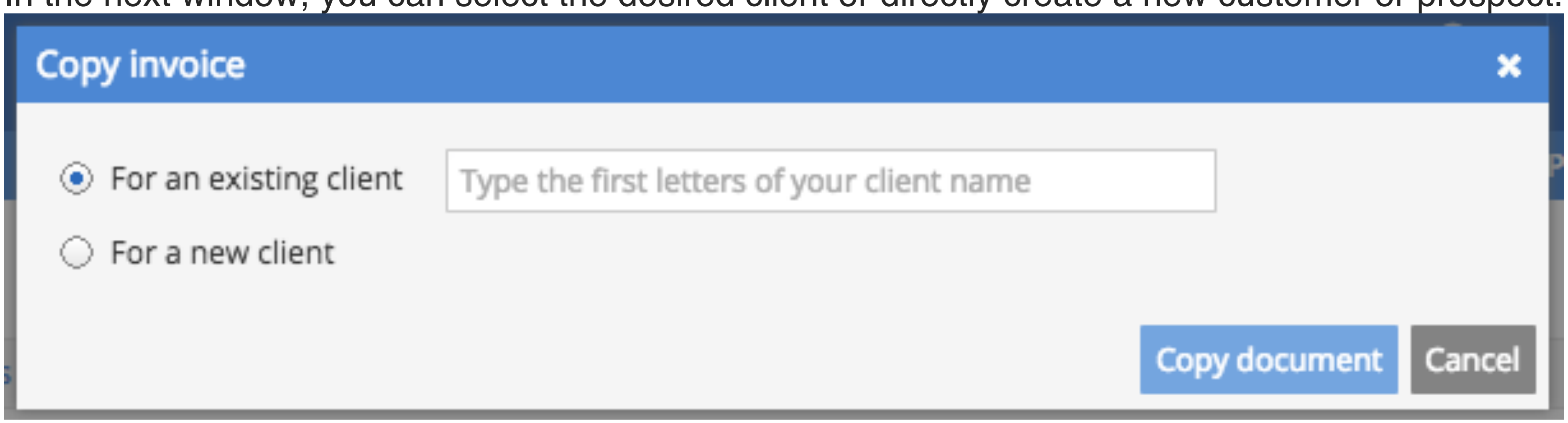
The document will be automatically generated in PDF (Portable Document Format), which allows for optimum print quality. Depending on your browser settings, the file will either open directly or it will be downloaded to your hard drive (usually in your **Downloads** folder).
On Macintosh, the PDF format is directly supported by the system; no installation of a PDF reader is required.

How to copy a document?

With Sellsy, it is very simple to create a copy of any document (estimate, invoice ...).
From the preview of your document, click **Copy document**:



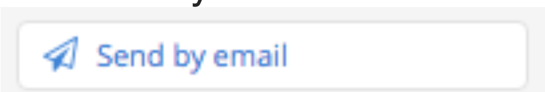
In the next window, you can select the desired client or directly create a new customer or prospect.



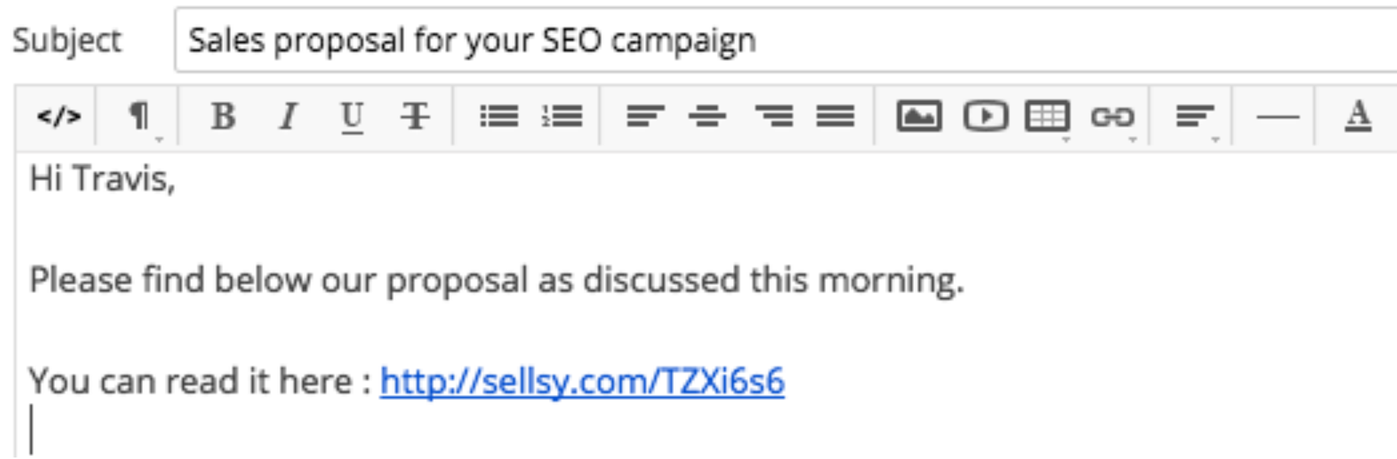
You are redirected to the editing window of your copied document. Make any adjustments and save your new document.

Business documents read tracking

When you send a document Redactor by email, you get a tracking of your contacts activity.
This is fully automatic. To start, from the document preview, click **Send by email**:



The sending windows that you're familiar with appears.

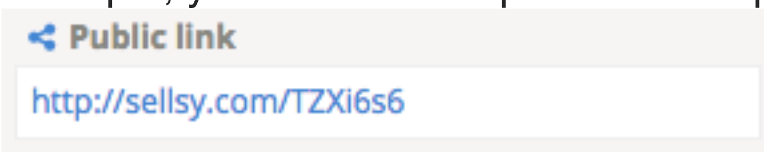


As you can see, a link your document is displayed.

Note : if you previously edited your email template, the link might not be displayed.
.

Important note:

If you wish to use the tracking feature accurately, do not check the box to attach the PDF document as an attachment. If your client directly reads the PDF, it will not be counted.
Tip: If you want to share your document without sending an email, in Skype or Google Hangouts for example, you can use the public link displayed in the overview:



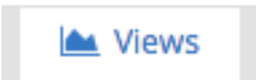
When your customer clicks on the link, they are redirected to the document preview.

Note: your client may also retrieve its documents in its client portal if you gave him access.

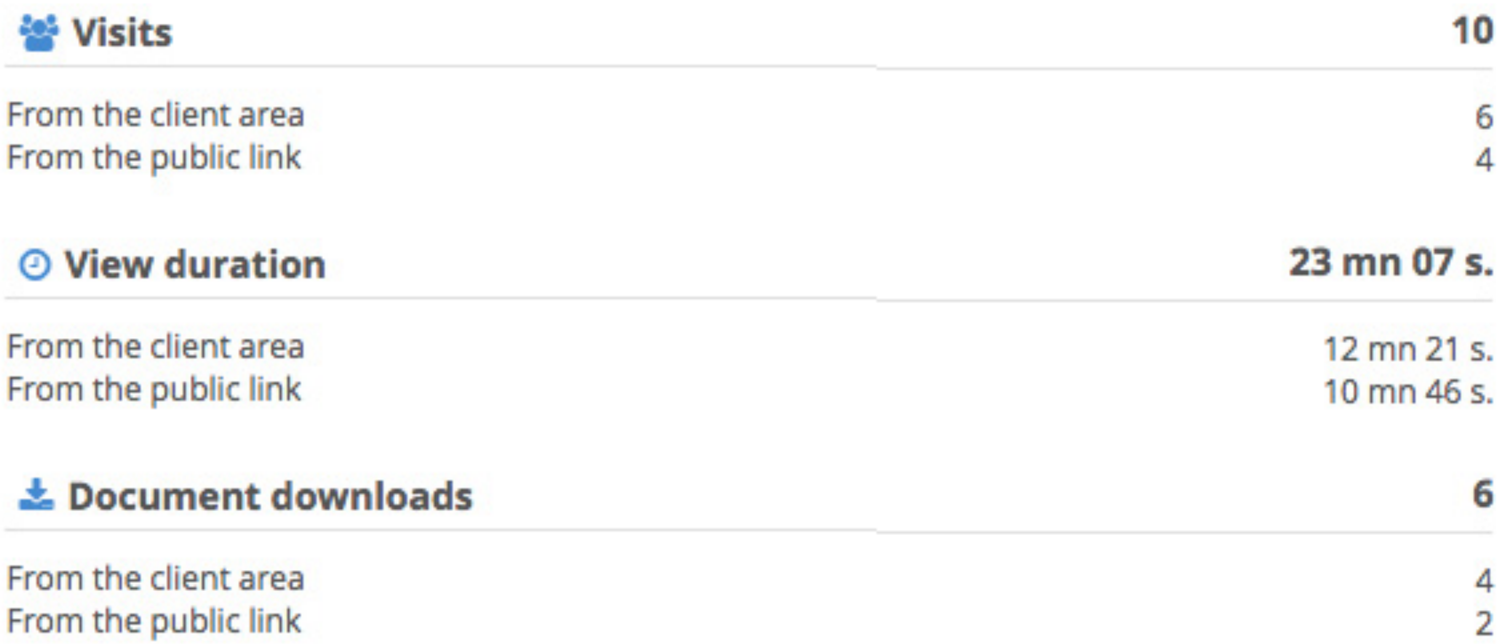
Views and reads tracking

When displayed to your clients, the time spent to consult your document is saved, like its clicks on the download link.

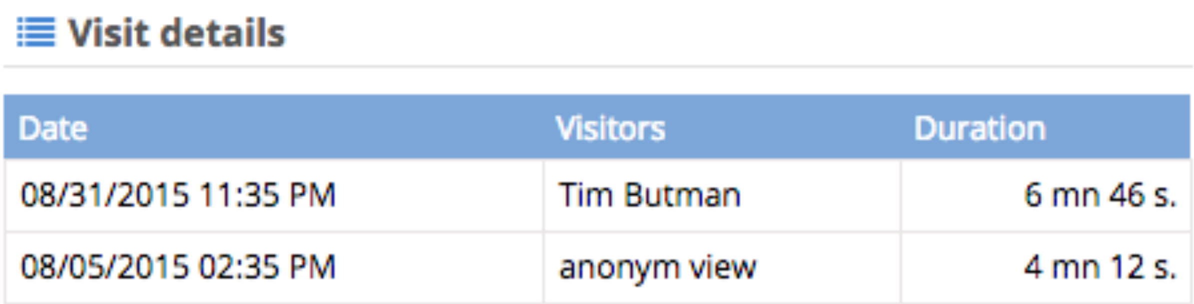
Then you will find this information in the **Views** tab from the document preview:



You now have statistics on the number and duration of visits:



You also have the details of the visits. In the case of users connected via the client area, their name is displayed.


Visit details

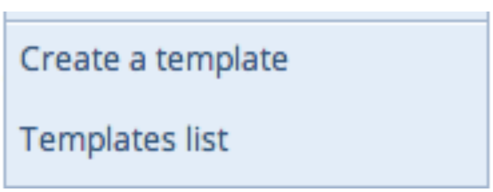
Date	Visitors	Duration
08/31/2015 11:35 PM	Tim Butman	6 mn 46 s.
08/05/2015 02:35 PM	anonym view	4 mn 12 s.

Using document templates

Document templates allow you to create pre-filled documents that you can easily reuse when creating a document.

This useful feature is also associated with the **Subscriptions management** add-on.

To create a template document, click on the **Documents** menu and click **Create template**.

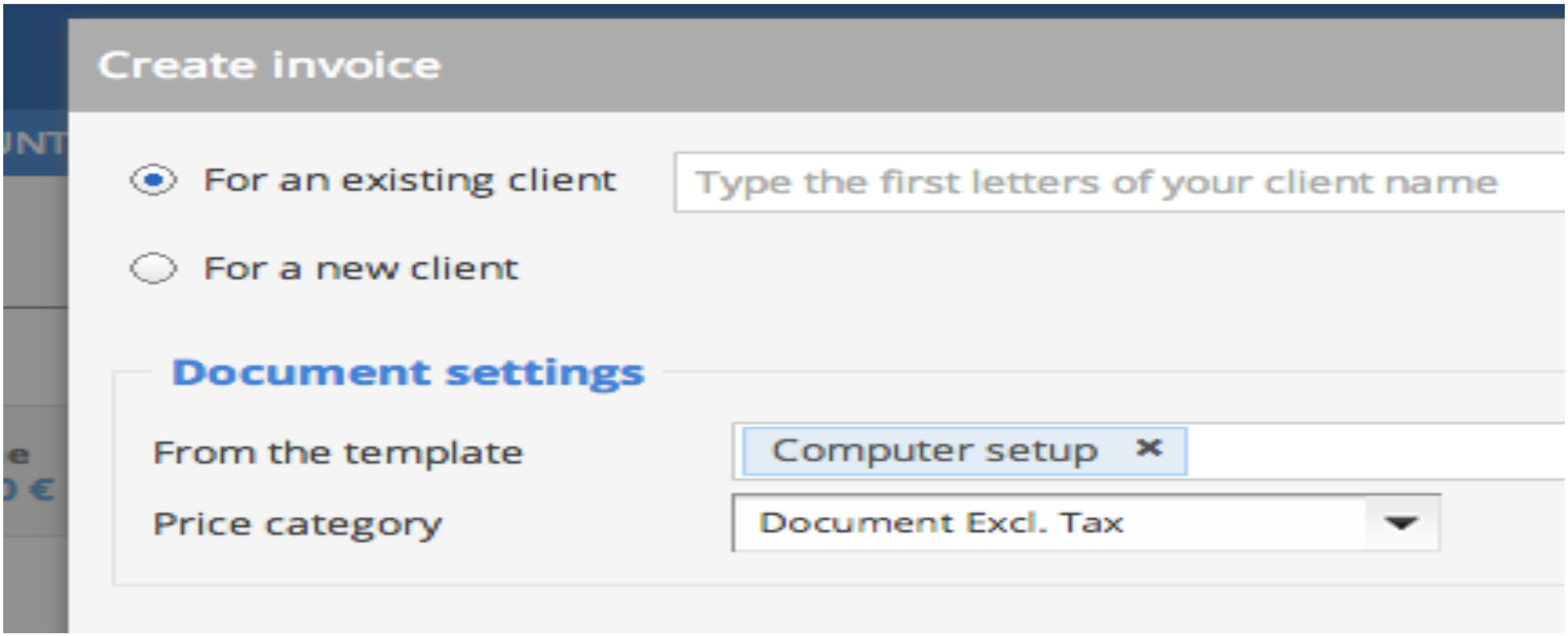


Choose the price category in the window that appears and fill in your document as you would a normal document.

The document is a model, so no customer information is displayed.

Remember to fill in a name for your template.

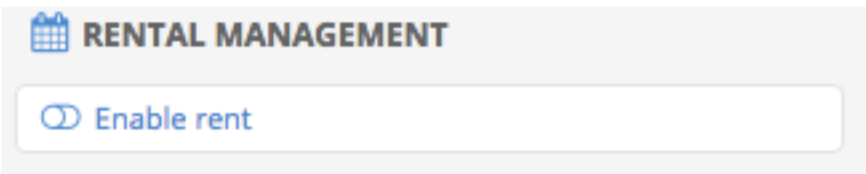
To use your template, simply select it when you create a document.



Prepare a product for rental

To rent a product, you must enable the rental option from the product page.

To do this, once the add-on enabled, go to the desired product's page and click **Enable rent**.



You will have to choose a method for managing your rental stock.

Three options are available.

No: no use of Rental stock

In this case, your product is considered unique; you can rent it only once at a given time. It is the choice to make for example a well-identified vehicle.

Yes: use Rental stock

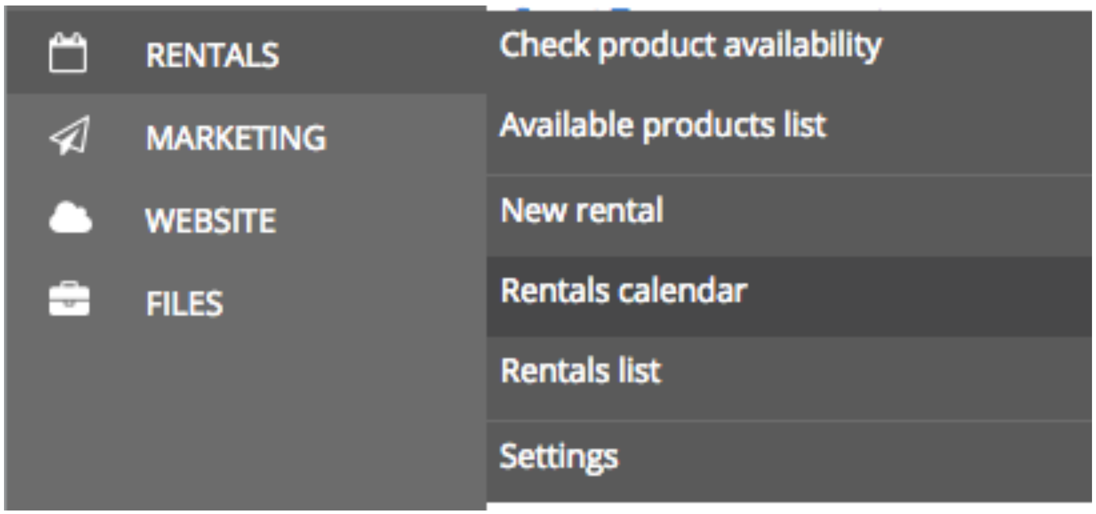
Ideal if you rent interchangeable products, such as dishes for example. In this case, you should set an available quantity (per warehouse if you have several defined in the add-on settings).

Infinite: use Rental inventory limitless

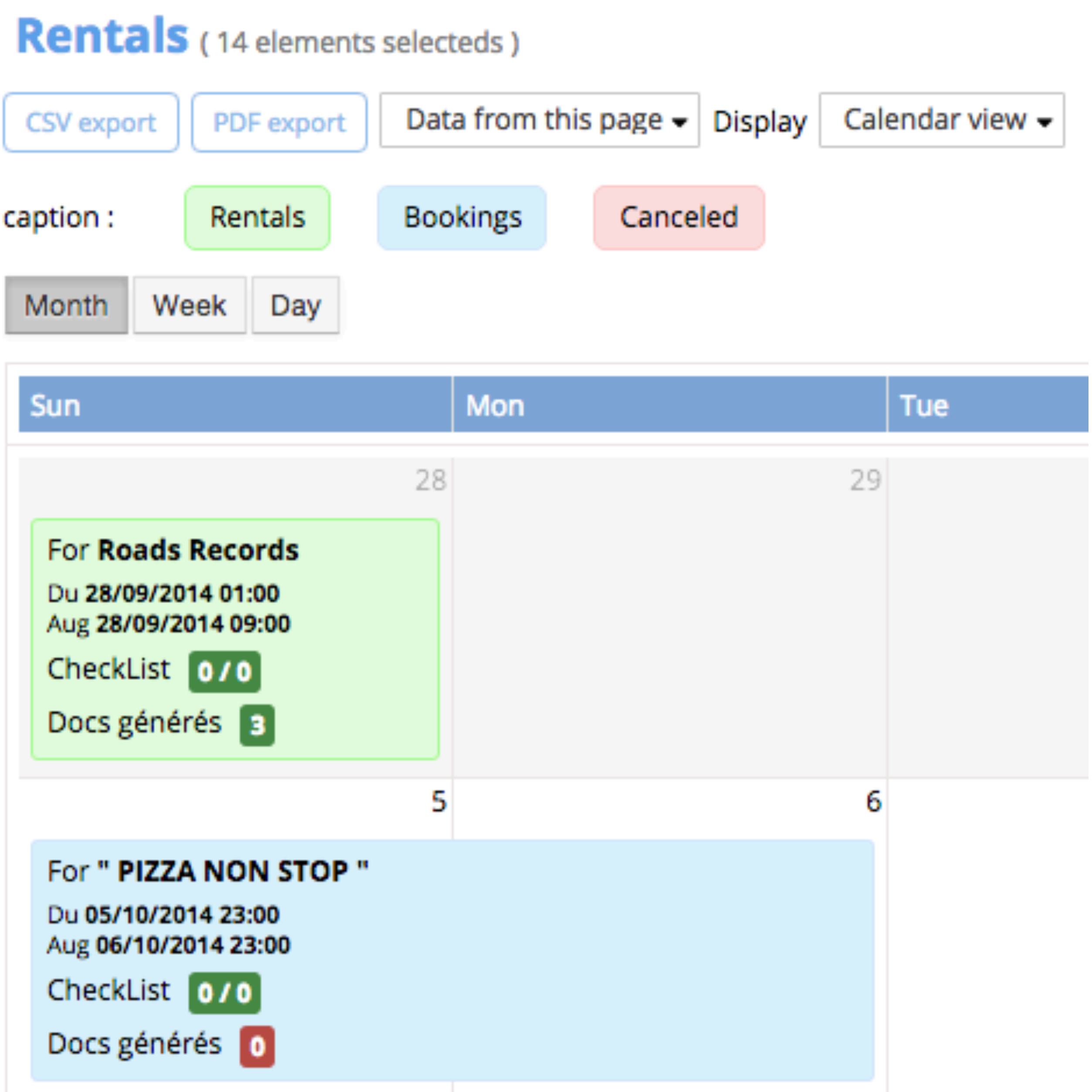
With this option, you manage availability yourself. Guests can rent the product without quantity limitation.
The next step is the creation of your pricing information, which is documented in the following article.
Important note: managing your rental stock is completely dissociated from sales inventory management. However, you can sell and rent the same product.

Using calendar view

The calendar view is a powerful tool for a snapshot of your rental forerecast overview. You can access it from the main **Rentals** menu:



The calendar view is displayed:

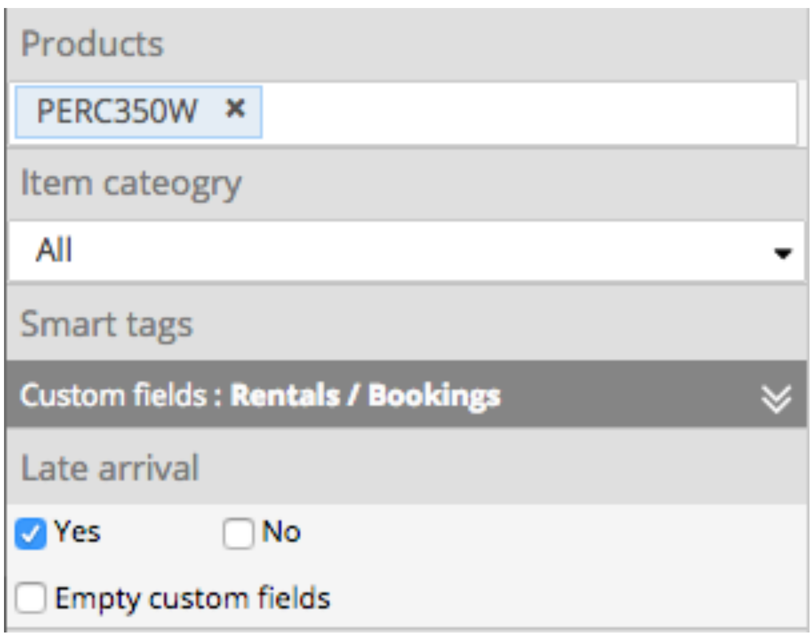

Rentals (14 elements selecteds)
CSV export
PDF export
Data from this page
Display
Calendar view
caption :
Rentals
Bookings
Canceled
Month
Week
Day
Sun
Mon
Tue
28
29
For Roads Records
Du 28/09/2014 01:00
Aug 28/09/2014 09:00
CheckList 0 / 0
Docs générés 3
5
6
For " PIZZA NON STOP "
Du 05/10/2014 23:00
Aug 06/10/2014 23:00
CheckList 0 / 0
Docs générés 0

You can then view your bookings (in blue) and your rentals (in green).

By clicking on a rental / booking, you go directly to the overview.

You can also move your rental with drag and drop (if the one of the products is unavailable, the system will alert you).

Of course, you can filter your rentals with the left panel:



Add a rental or a booking

To create a location, Sellsy offers two options:

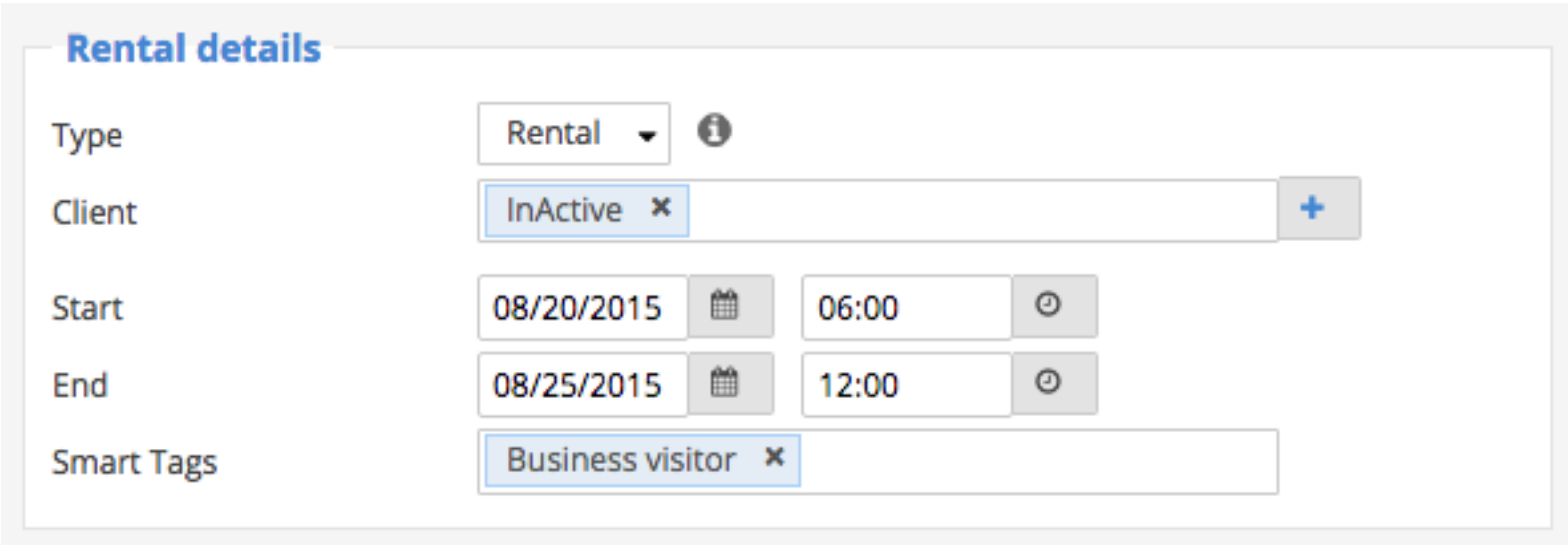
- creating a booking
- creating a rental
-

A booking is, as its name suggests, an option on a rental. This step can for example be used to send a quote to your customer and block his dates until receipt of the deposit.

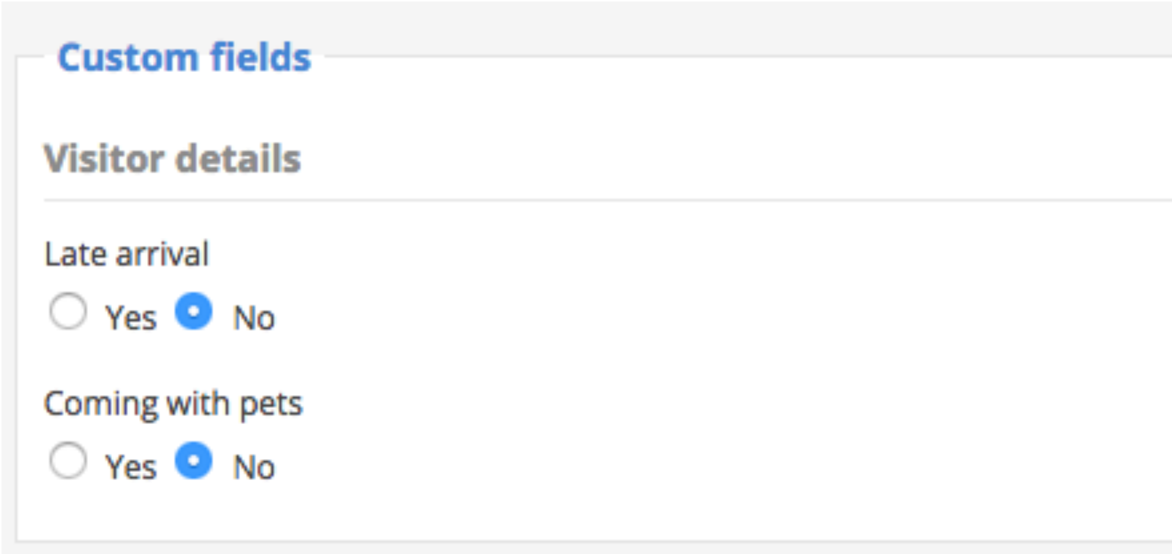
At any time, you can convert a booking to a rental.

To create your first rental, you can:
- create rental directly from the product record
- create rental from the **Rentals** menu

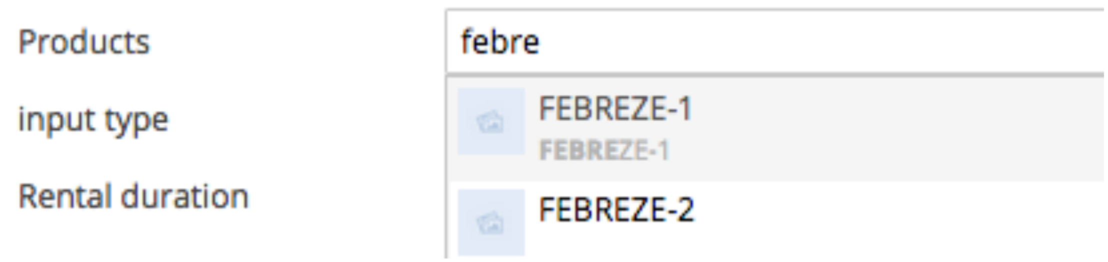
In the window, set the criteria for your rental:



First choose whether it is a rental or a booking, then the client.
Then set the start and end of rental.
You can also use smart tags if you wish.



Custom fields allow you to easily filter your rentals. They can also be displayed on the documents.
You can then select the product or products for rent:



Note: to appear, your products must be configured for rentals.
Your product appears.

Product	Price type	Price	Rental locations	Quantity	Amount Exc.Tax
PERC800W	Default price	Hourly price	City shop	1,00	60

You can then adjust the price, choose the rental place and possibly adjust the amounts manually.

You can also choose to display your prices including or excluding sales tax.

When you confirm, you are redirected to the rentals listing.

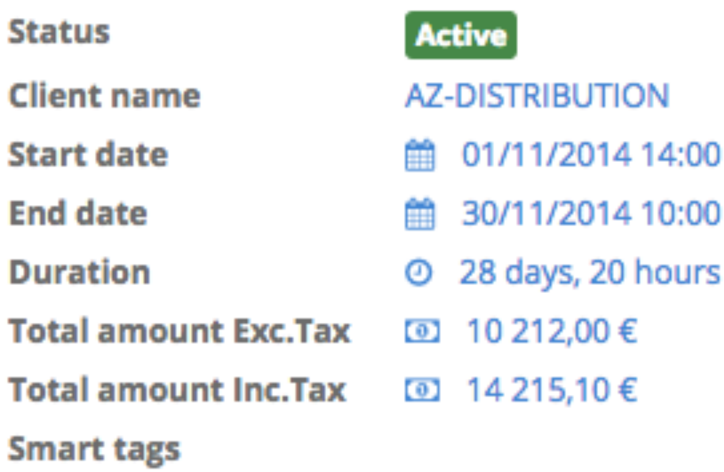
Creating estimates/invoices for rentals

Managing bookings and rentals

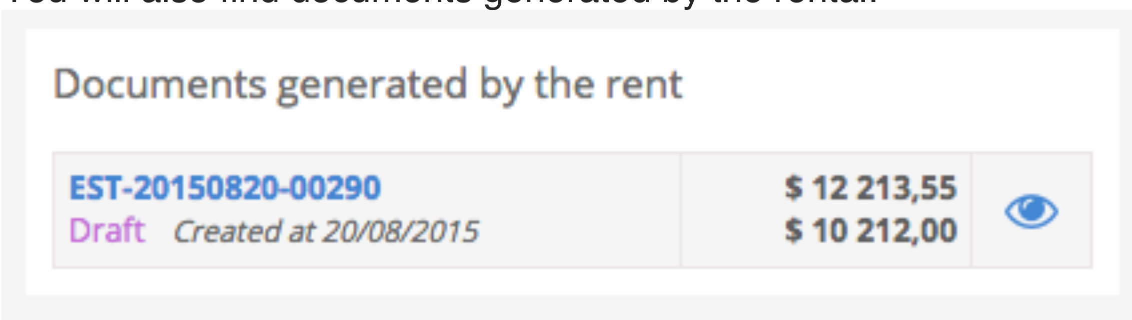
Once your booking or rental is created, you can access it in several ways:

- from the customer record in the **Rentals** tab
- from product records in the **Rentals** tab
- from the main **Rentals** menu
- from the calendar in the main **Rentals** menu

In all cases, click on the rental line to preview (right click also gives you access to other options). The overview of the booking or rental appears:



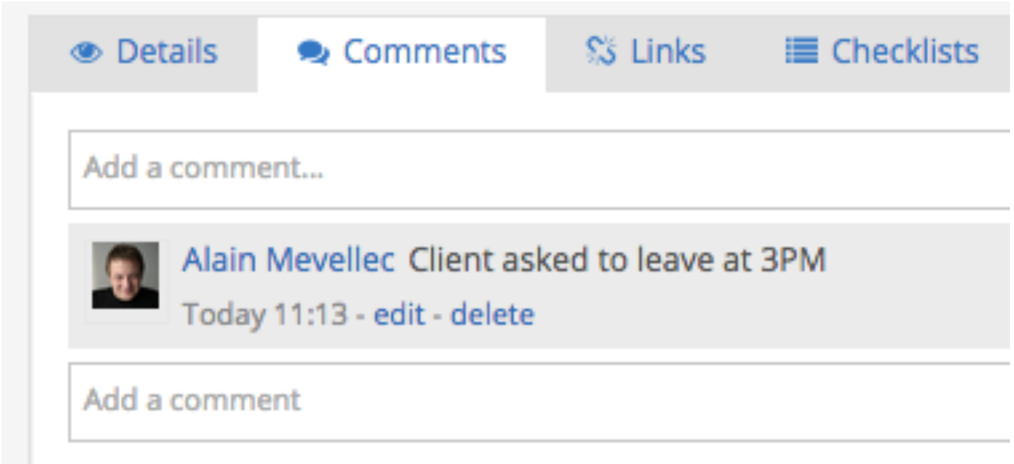
You will also find documents generated by the rental:



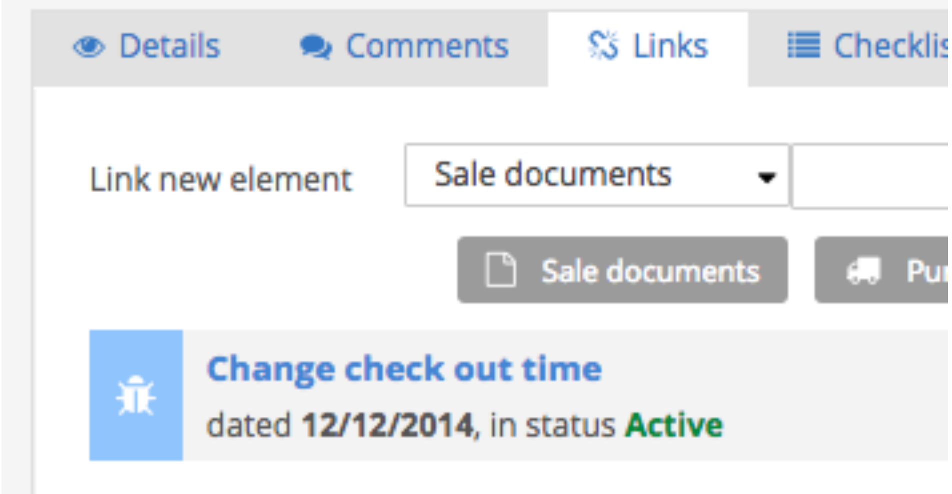
The right side allows you to find details of your rental products.

The tabs also allow you to store or share:

Comments with your team

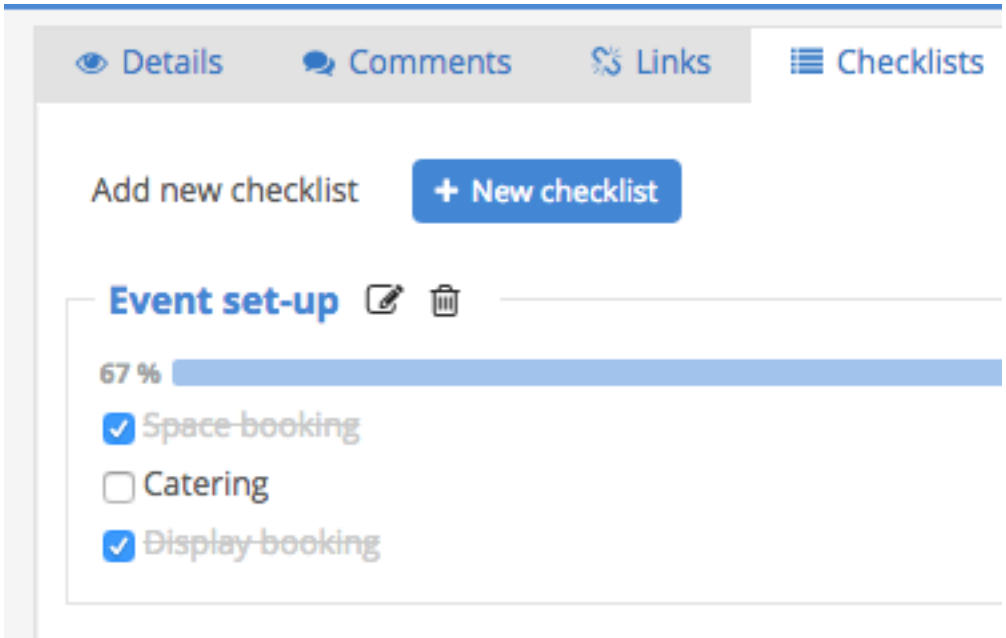


Links with Sellsy objects (documents, opportunities, support tickets).

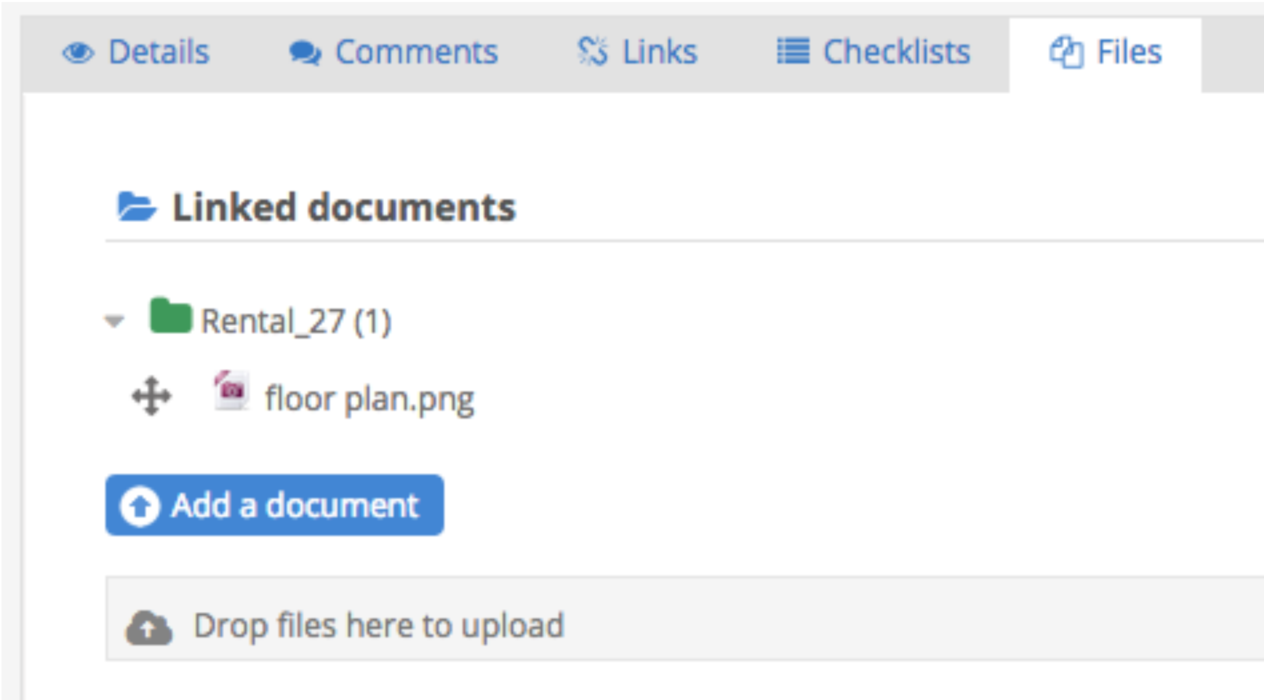


A very useful feature if for example you want to store the information requested by email to your support.

A checklist


Details
Comments
Links
Checklists
Add new checklist
+ New checklist
Event set-up
67 %
~~Space booking~~
Catering
~~Display booking~~

Files



Once rental is saved, it is very simple to create an estimate or an invoice.

To do this, open the preview of the rental. You can access it in several ways:

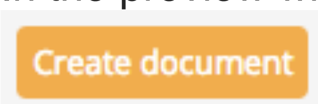
• from the customer record in the **Rentals** tab

• from the product record in the **Rentals** tab

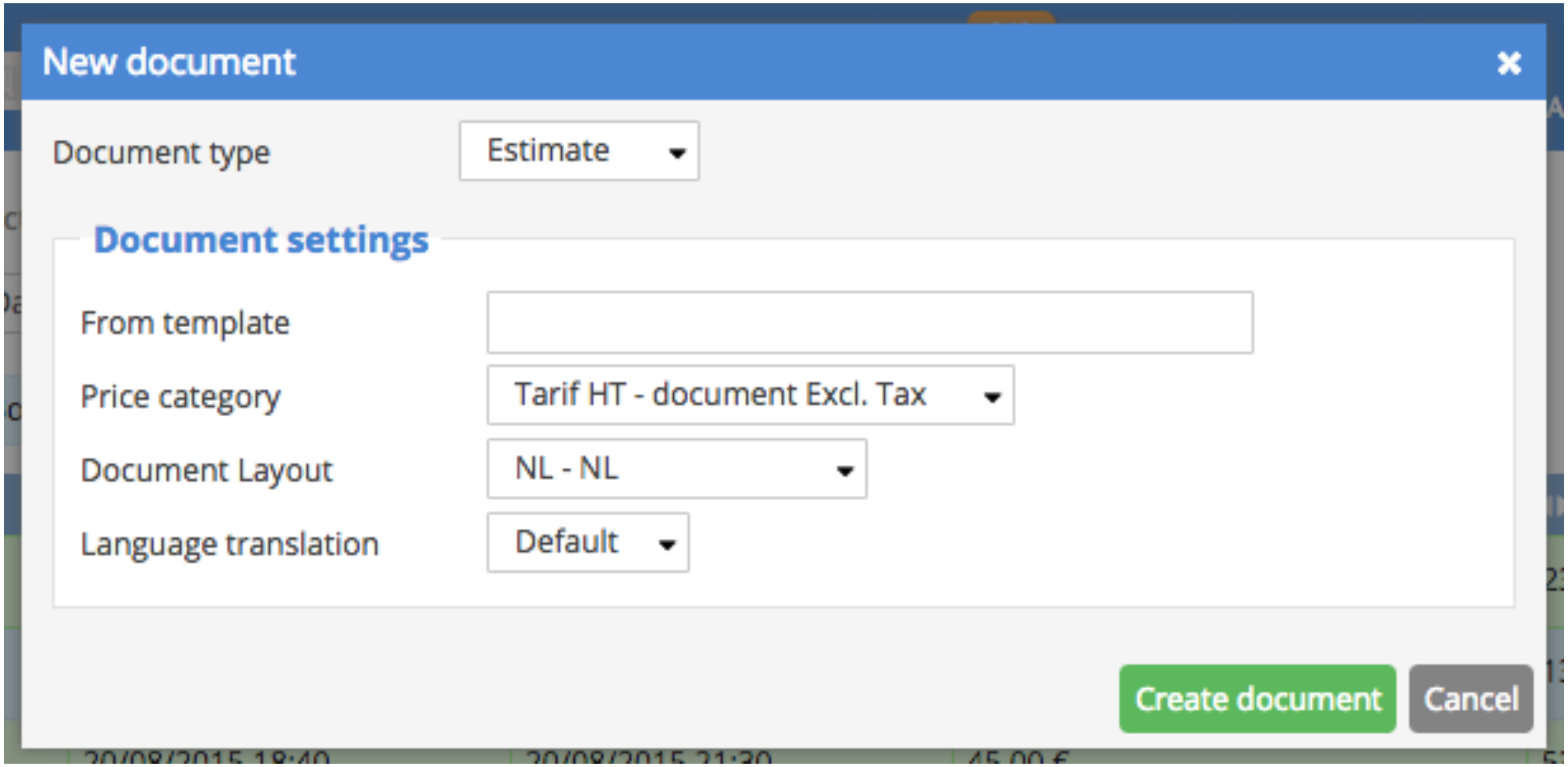
• from the list of available rentals from the main **Rentals** menu

• from the calendar view from the main **Rentals** menu

In the preview window, click **Create document**:



You can then choose the type of document you want created and the settings you used on Sellsy:



Your document appears in edit mode.

At this point, you can add additional services, such as city tax or shipping.

Save your document normally. You can then send it to your customer like any document on Sellsy.

Receiving and sending emails with Sellsy

Your email exchanges are an essential part of your sales management.

With Sellsy, you can easily receive and send professional emails and attach emails to your clients records.

Let's look at a real-world example.

EX: Your client validated your quote via email. Now, if you transfer this email to Sellsy, you can attach it to the client record.

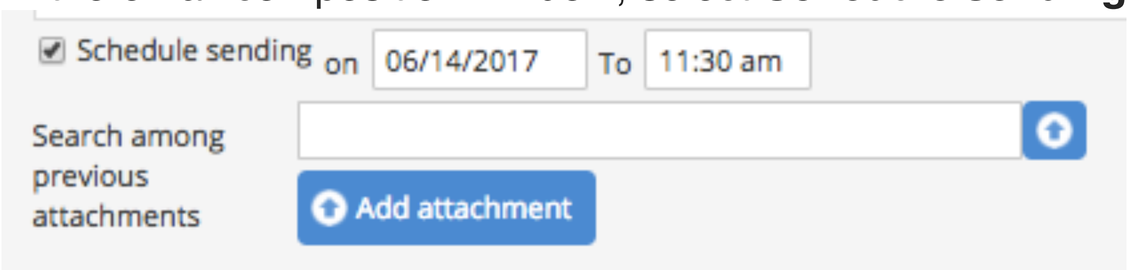
This way, you can keep track of exchanges for each client, and keep the exchange records easily accessible (without having to search in your email software).

How do I schedule an email?

Email management is an essential element when it comes to prospecting.

You can easily set a future send date when you send emails from within an opportunity.
To do this, click **New** from the **Emails** panel:

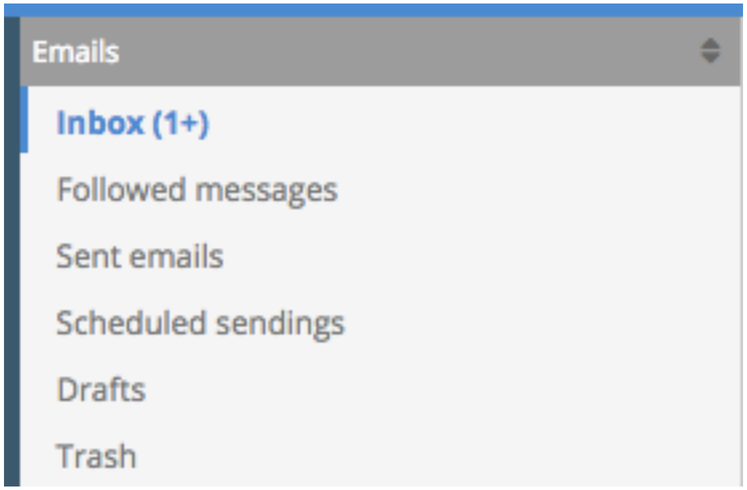
In the email composition window, select **Schedule sending**.



The scheduled email appears in the **Scheduled** section of the email panel.

Before delivery time, you have the option to edit or delete the email.

All your scheduled emails can be accessed from the **Scheduled sendings** section of your general mailbox:



How do I create custom e-mails templates?

With Sellsy, you can create custom email templates that you can use again in the future.

This feature is useful if you want to:

- Schedule an email reminder in the CRM
- Use different email templates depending on the kind of customer
- Define templates in different languages

To create a custom email template, click on **Settings**, then on **Custom email**.

Click on **Add template**.