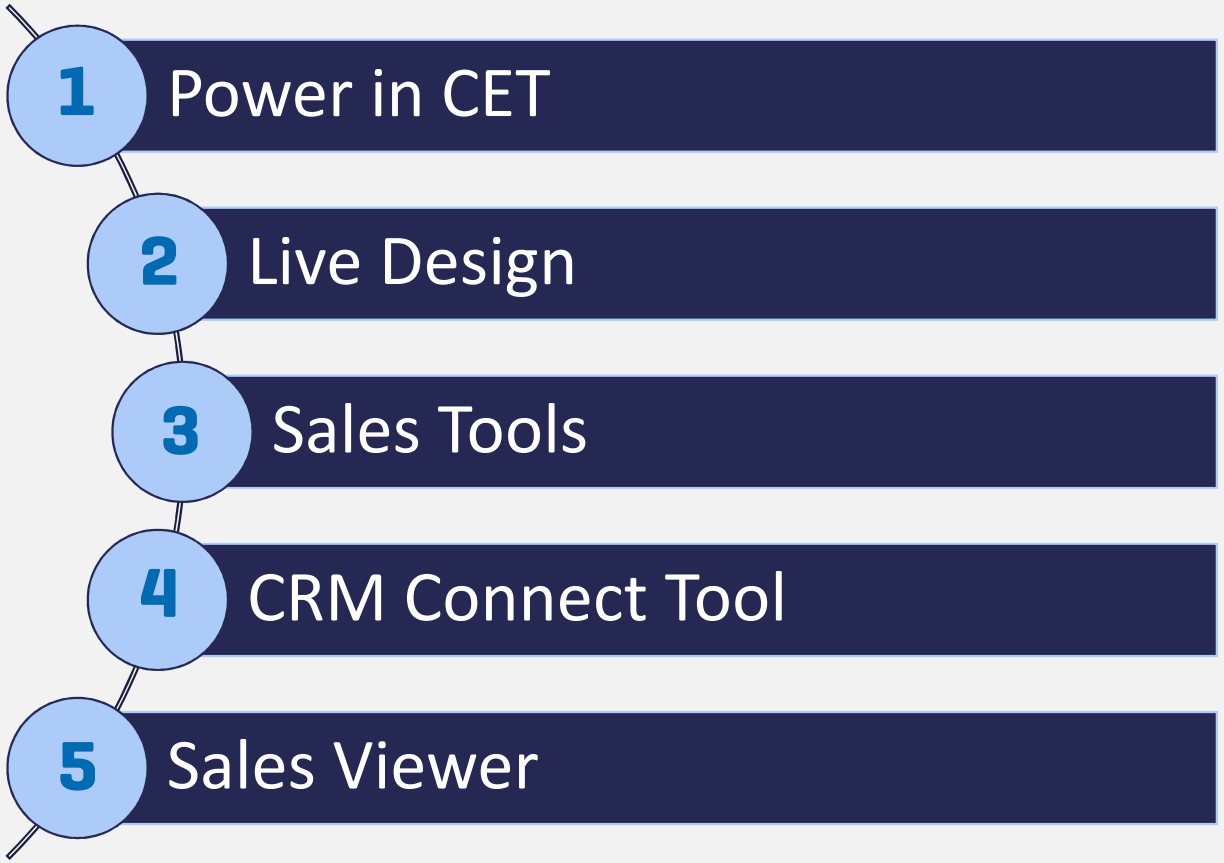
CET DESIGNER USER AND DEVELOPER CONFERENCE

CET Designer for Sales

Brooke Snow
Configura

AGENDA


1
Power in CET
2
Live Design
3
Sales Tools
4
CRM Connect Tool
5
Sales Viewer

POWER in the **TOOL**
Not just for the pretty pictures
Take advantage of the full **ALL IN ONE** tool

LIVE Design

#1 investment your co
Laptops!

More details: Jason Lund's & Donald Stratton

Spec requirements on website

Talk to our support staff for help!

Take your laptop out to the client

Work *TOGETHER* with your client

Overall better dynamic of the design

Make it **FUN**

Lorna – "Close the deal with live design"

Take advantage of the **ALL** the tools…

10 CET DESIGNER USER AND DEVELOPER CONFERENCE

SCHEMES

Schemes

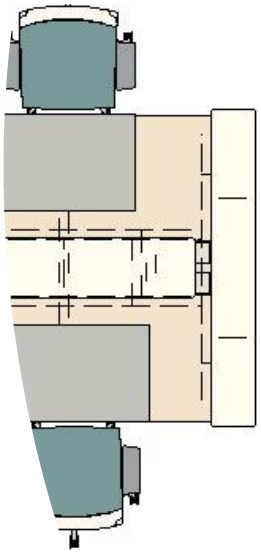
Light, dark, pop of color?

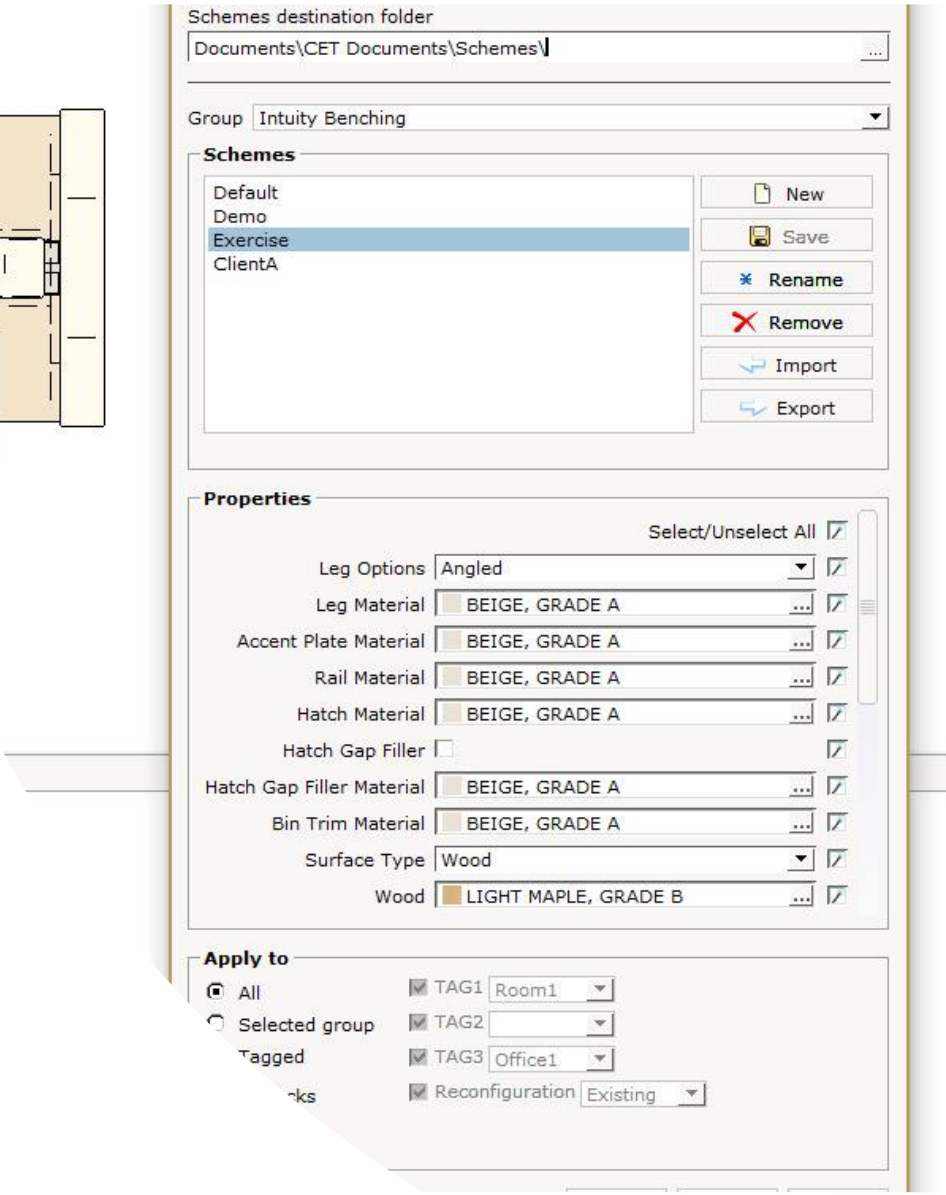
- Have it pre-set
- This turns over business quickly!
- Toggle through the options with your client
- Think what would bring emotion to your client

Reusable file

- Set up a client folder and save these there

Manufacturers schemes might look different, but function the same





10 CET DESIGNER USER AND DEVELOPER CONFERENCE

FAVORITES

Favorites

Pre-load “idea starters”

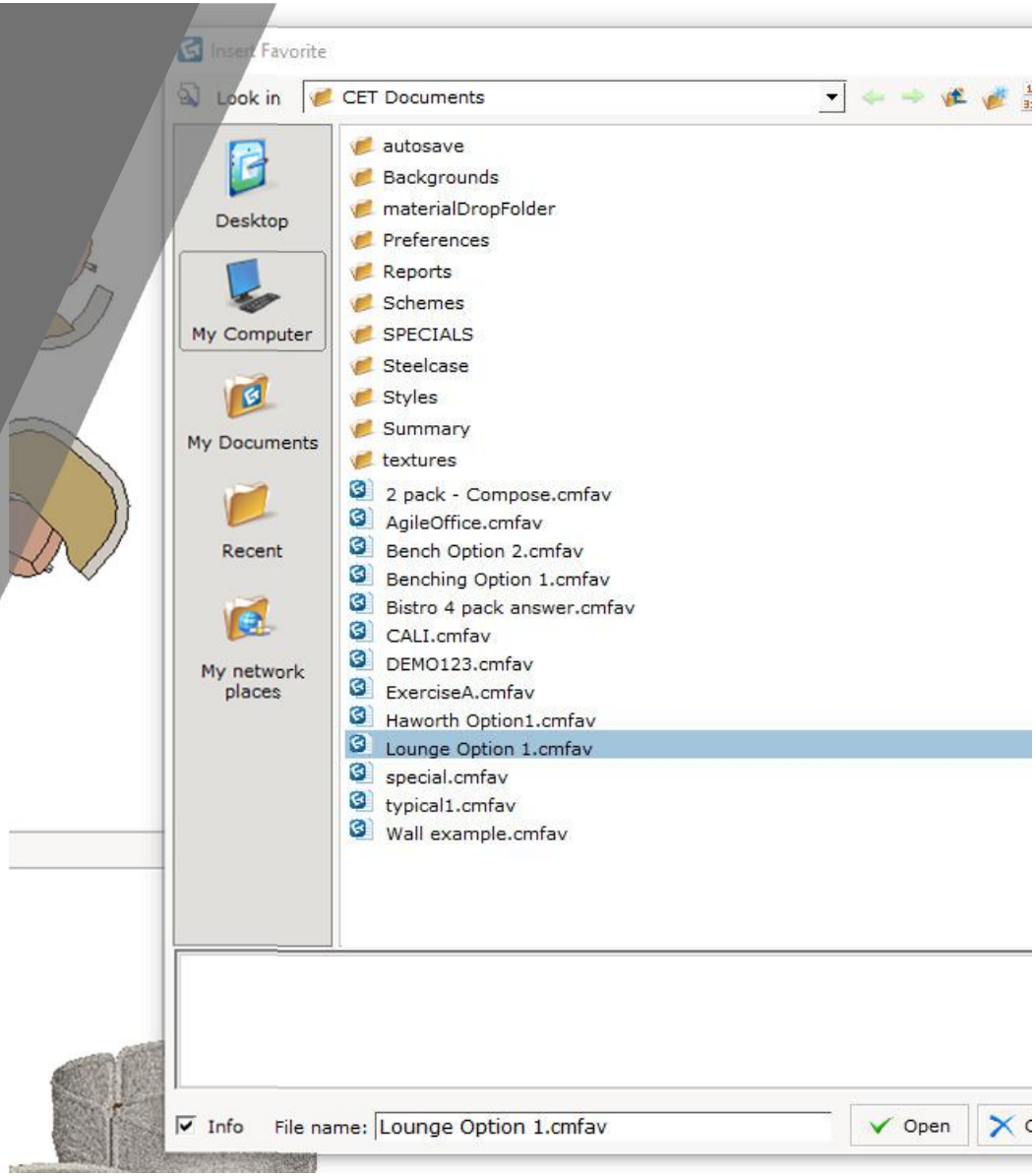
Reusable file

- Save to that client folder

Client Standards – Typical A, Typical B or Typical C… with mirroring –TADA!

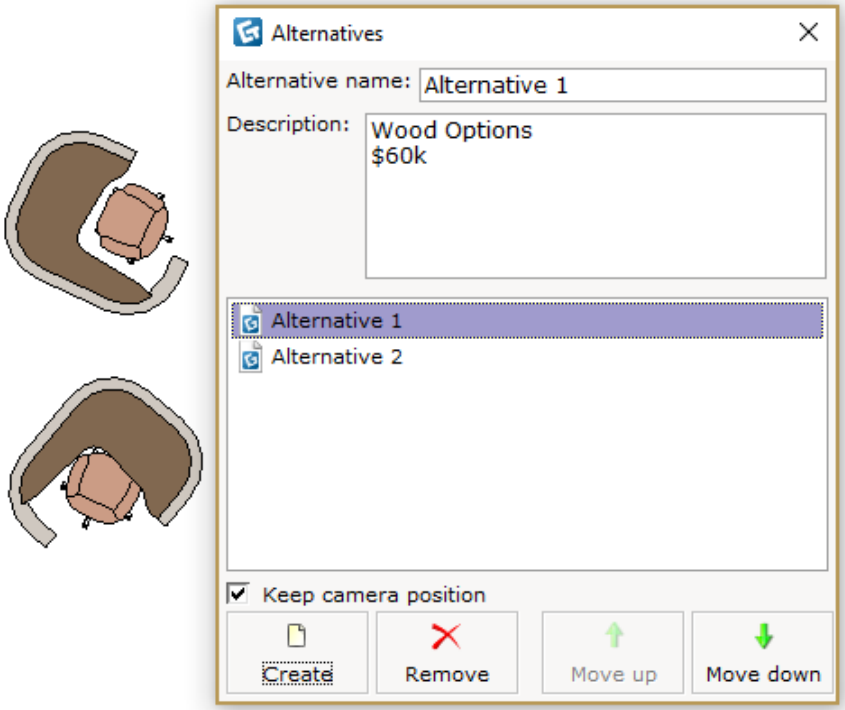
Literally anything & everything in the drawing can be a fav:

- Specials
- Edit Graphics
- Custom Shapes
- Picklist
- Sketchup Symbols… not always connected to the internet, no problem



10 CET DESIGNER USER AND DEVELOPER CONFERENCE

ALTERNATIVES



Alternatives

Can quickly give options to client

- ALL saved in one drawing
- Dialog box will pop up when load drawing

See different price points per alternative

Can take notes from the client

Can be used in many ways…

- Separate multiple floors on different alternatives - work around from multi-floors
- Phases - can show same floorplan just phased out
- Reconfigurations

CET DESIGNER USER AND DEVELOPER CONFERENCE

Utlizing Calculations

Utilizing Calculations

Set up templates for your dealership…

- “Demo template” for live design
- Can turn off summary in Calculation View

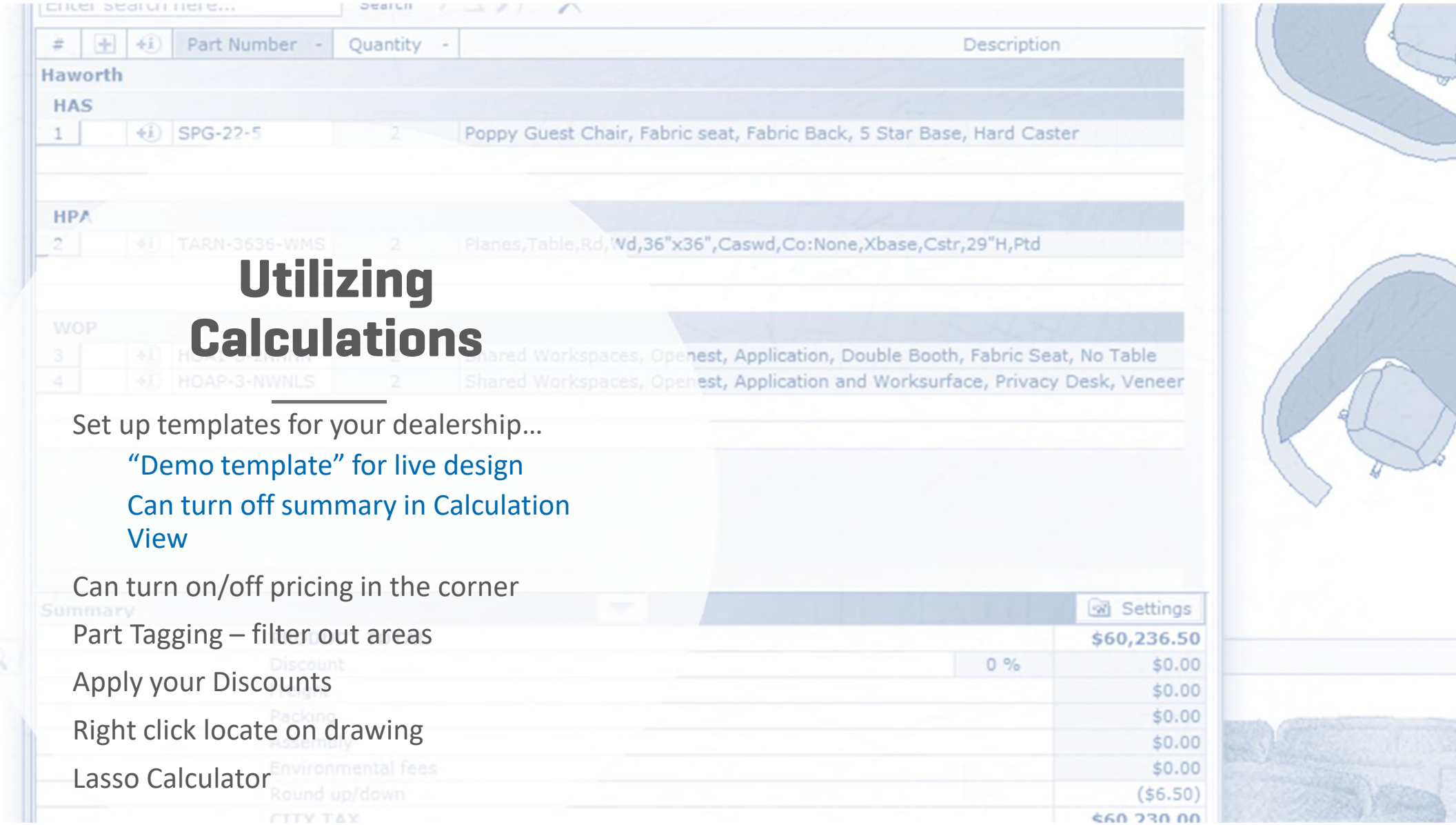
Can turn on/off pricing in the corner

Part Tagging – filter out areas

Apply your Discounts

Right click locate on drawing

Lasso Calculator



CET DESIGNER USER AND DEVELOPER CONFERENCE

Stay In 3D

Stay in 3D

Make it **FUN**

- Bring out the emotion in the client. This is what they want to see!

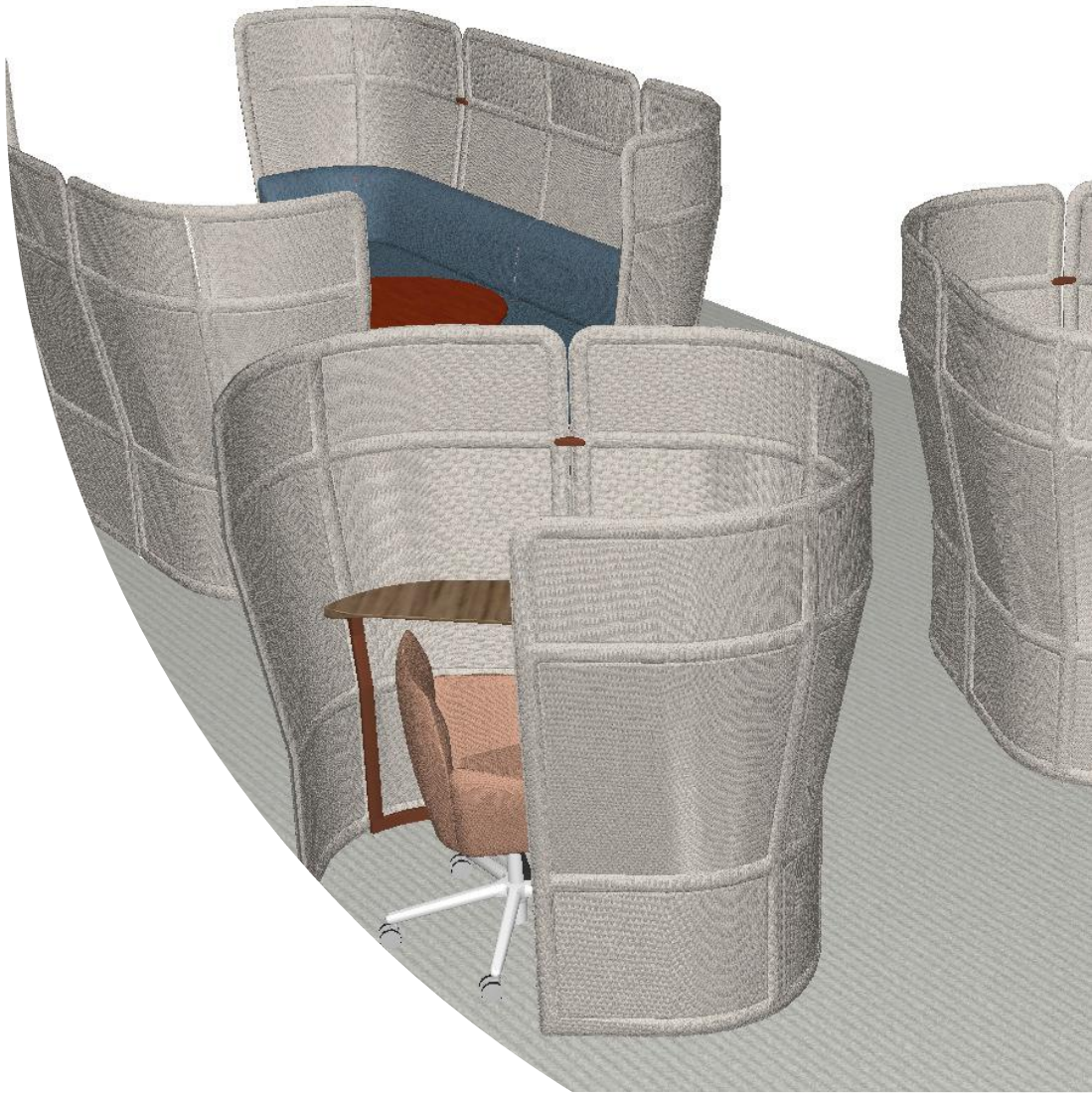
Quick… *but not too quick*

Utilize the freeze command

DEMO view mode

- Customize & get rid of everything

Pop out a 3D view



CET DESIGNER USER AND DEVELOPER CONFERENCE

Pretty Pictures

Pretty Pictures

Renderings

- Set up multiple angles ahead of time
- Utilize simple
- Advance? Save settings as preset
- Quick rendering in 3D View

360's

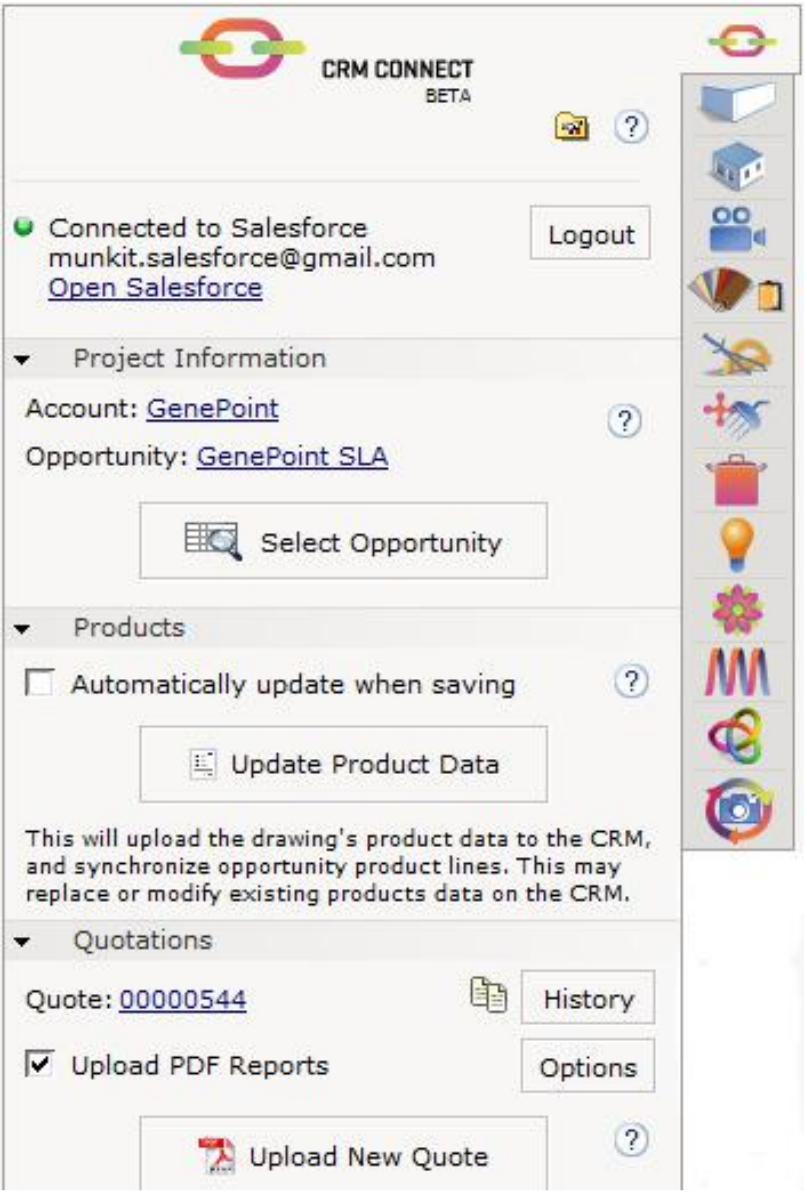
- Yulio – 30 day free trial

Virtual Reality – Oculus Rift & HTC Vive

AR?! Cooool stuff!

CET DESIGNER USER AND DEVELOPER CONFERENCE

CRM Connect Tool



CRM Connect Tool

CRM = Customer Relationship Management

We support Salesforce & Zoho

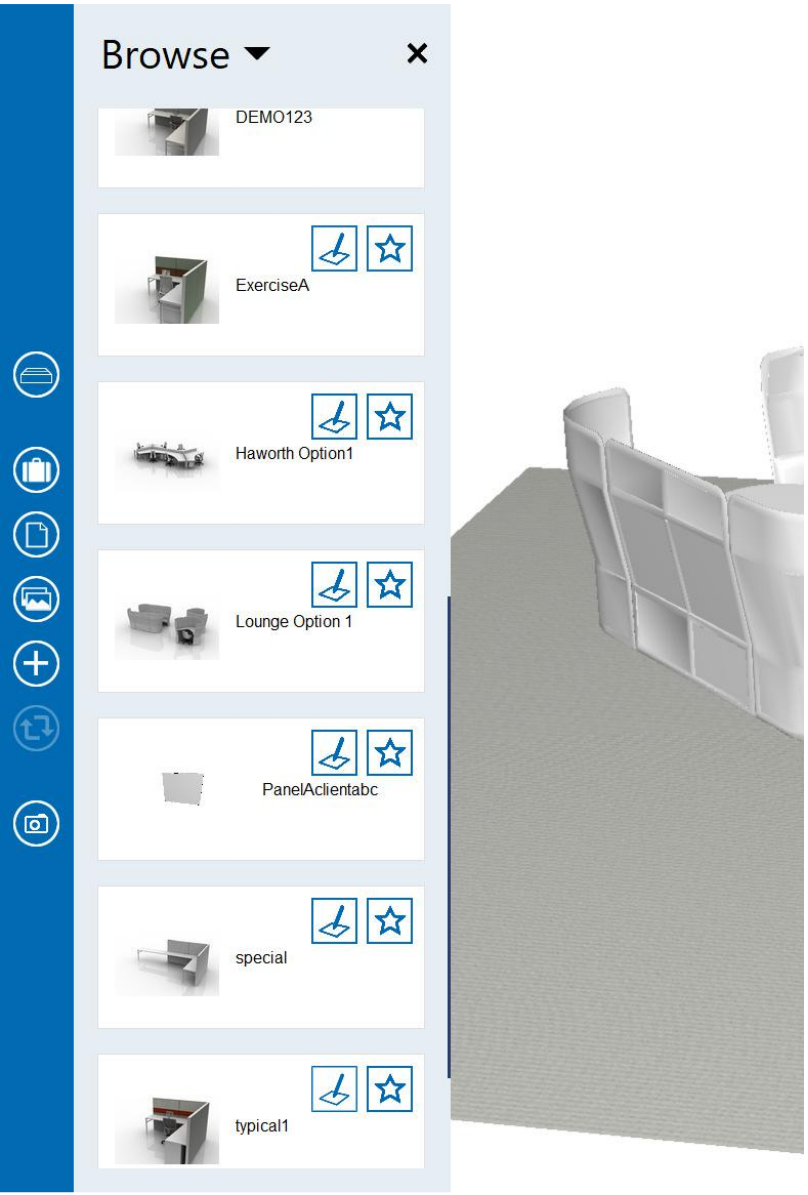
Features:

- Load latest project information from the CRM system
- Populate product databases in the CRM system
- Synchronize opportunities with product line items
- Automatically generating quotation numbers
- Upload reports generated in CET Designer to the CRM system

Getting Started:
https://www.configura.com/cet/support/getting-started-with-crm-connect/

CET DESIGNER USER AND DEVELOPER CONFERENCE

Sales Viewer



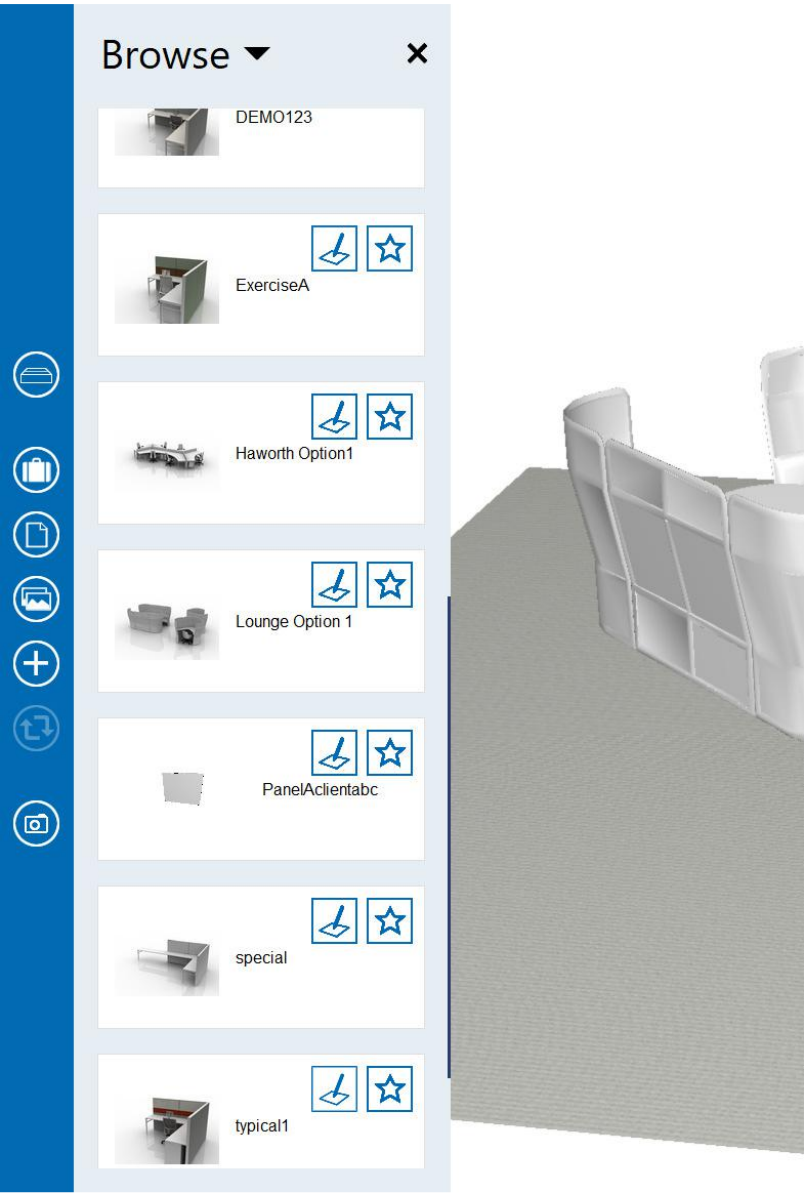
Sales Viewer

What is Sales Viewer?

Intended for use on the go, Sales Viewer is a demo and sales tool for designers and salespeople that enables you to create drawings using favorites, either on site with a customer or as a preparation step before a customer meeting

Focus lies on quickly presenting products in an appealing and interactive way, which is achieved through easy design, attractive photos and instant price calculation

Sales Viewer has been developed mainly for touchscreens and has been successfully tested on Surface Pro

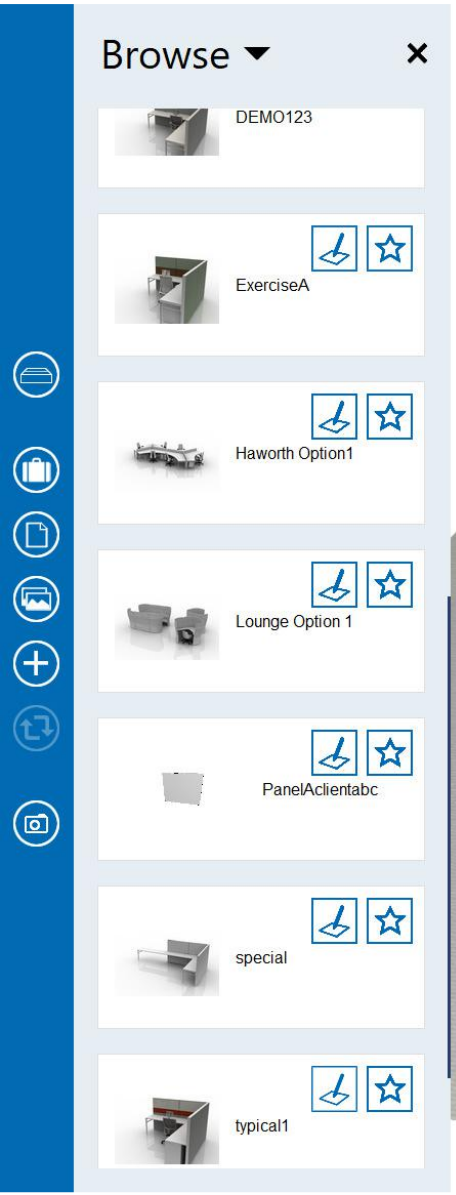


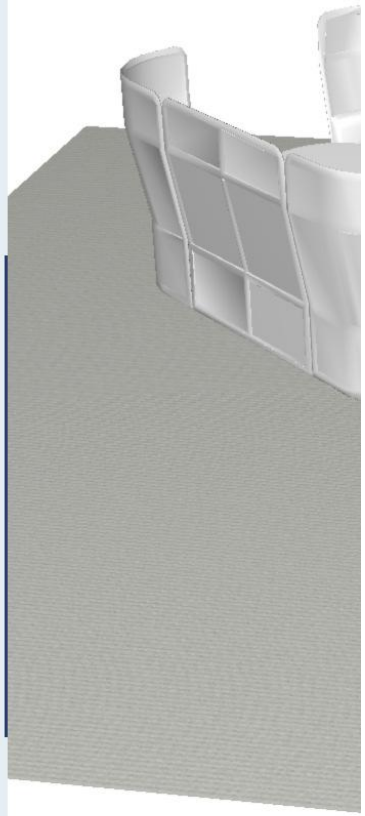
Sales Viewer

How does it work?

An administrator sets up a *Collection* of favorites in **CET Designer**, publishes the Collection on **MyConfigura**, and gives users access rights to the Collection. The administrator creates, edits and publishes Collections; a role that anyone with a Sales Viewer license can have. Collections cannot be edited or altered from within Sales Viewer.

In **Sales Viewer**, users can access their Collections and use the favorites in different customer projects – *Cases*. Each favorite can easily be bookmarked or commented; a great tool for remembering or taking notes on what the customer likes





Sales Viewer

What's Next?

A simplified BOM where you can see some prices and quantity of your drawing

Possibility to create a pdf of the BOM

Ability to save a rendering of a drawing

Filter on starred objects

Single install of Sales Viewer (so you cannot see CET if you only have Sales Viewer license)

Material on floor changed to white

Ability to change the name of a drawing

Ability to e-mail drawing

Q&A