



GUIDE FOR SALES AGENTS

The new CNC Factory website now makes it easier to:

- Share product information & communicate with prospects/customers
- Store notes on customers
- Access CNC Factory resources & bulletins

Getting Started: Setting up an Agent Account

This shows the interface for the **desktop** version. Some items may look different on tablet or mobile.

1. Open your browser to **www.cncfactory.com**



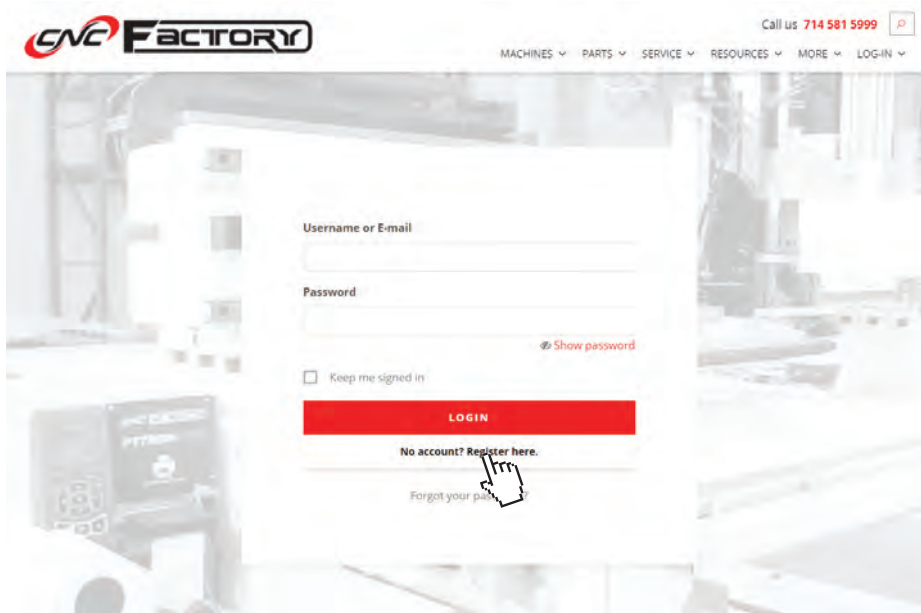
Under the LOG-IN Menu, click on “Agent”.



OR
In the footer, under CUSTOMERS, click on “Create a CNCFactory.com Account”.

GET STARTED	MACHINES	Thermofoil Press	SERVICE	RESOURCES	COMPANY	CUSTOMERS
Know what to ask when CNC Shopping Router Comparison Chart See Machines in Action Shop Parts	CNC Routers Viper XP Sidekicker XPR Python XPR CNC Insertion Scorpion LDR Scorpion X Scorpion Sidekick Edgehandlers Badger 3000 Badger 4000 Badger 5000	Cyclone 4898 Vacuum Pumps V300 Mover Return Conveyor Robotic Arm	Financing Sales Hotline Create a Tech Ticket Open Knowledge Center Support	Download Center CNC Tech CNC Factory in the news	About Us Careers Terms of Use Privacy Policy	Create a CNCFactory.com Account

2. Once this screen appears, click on the “No account? Register here.” button.



3. You will then be asked to provide the following information:

Username
joewoods

First Name
Joe

Last Name
Woods

E-mail Address
joewoods.wurth@gmail.com

Password

Confirm Password

[Show password](#)

- Must be atleast 8 Characters.
- Must have 1 Uppercase letter, 1 Lowercase letter & 1 Number.

Join as:
Choose account type

REGISTER

If you already have an account, log-in here.

Once set, this cannot be changed without reseting/deleting your account.

Your name will appear publicly on your referral links (to be explained later). Make sure to use one your customers will easily recognize.

This will also appear publicly so customers can contact you.

In the “Join as” dropdown, choose: “I’m a CNC Sales Agent”

Join as:

I want to subscribe to newsletters only

I'm a CNC Sales Agent (may need later verification by admin)

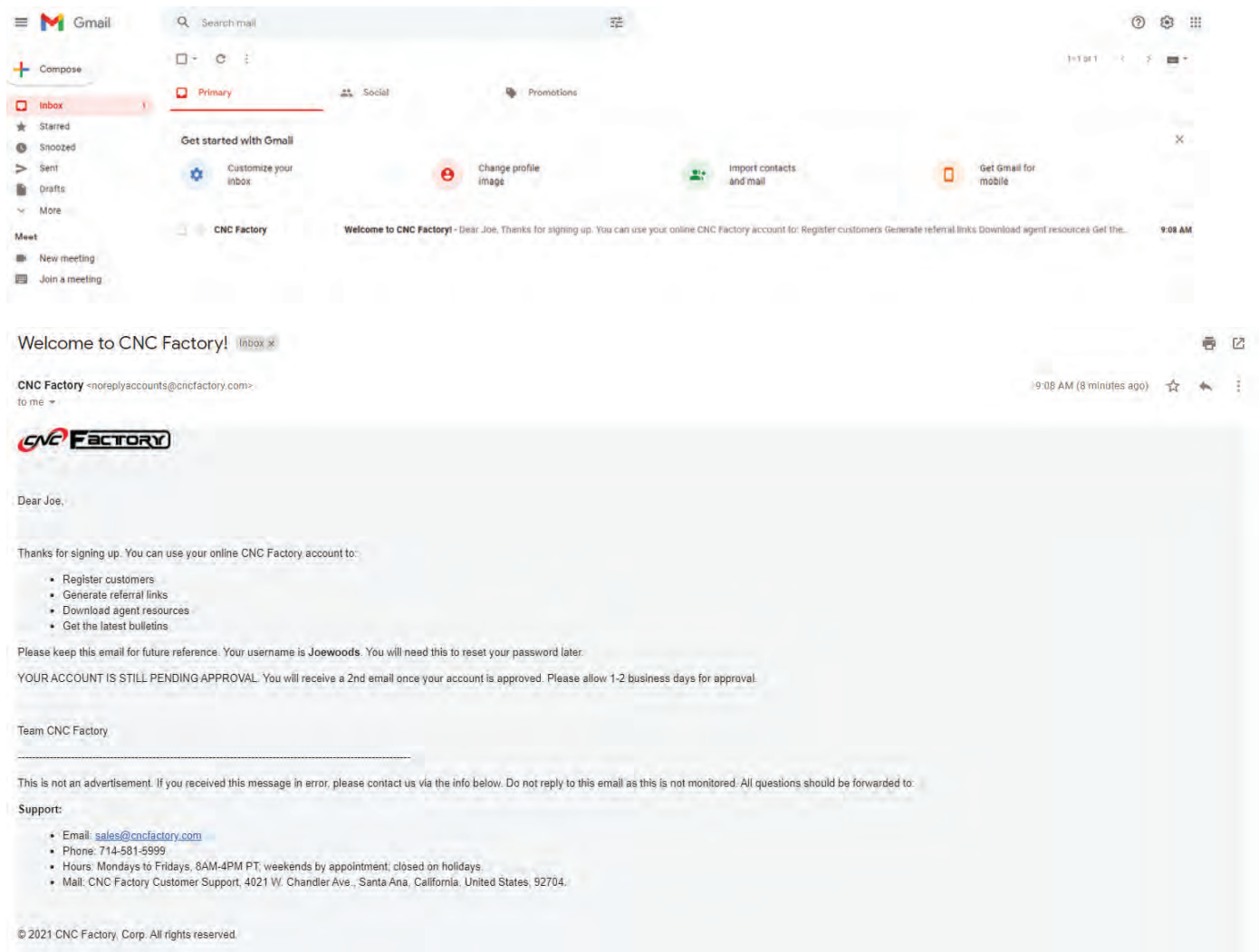
I want to create a CNCFactory.com account (recommended for clients)

Choose account type

4. After clicking the REGISTER button, you will receive this confirmation. Please allow us 1-2 business days to approve your account. If you need urgent approval, contact us at 714-581-5999.



You should also get a Welcome Email upon registration:



5. Once approved, you should get a second email notification.

Your account at CNC Factory is now active [Inbox](#)

CNC Factory <noreplyaccounts@cncfactory.com>
to me

9:11 AM (6 minutes ago) ☆ ↶ ⋮



Hi Joe,

Your CNC Factory Account has been approved! You may now [login here](#).

We look forward to serving you.

Team CNC Factory

This email is not monitored. For any concern, please contact [714-581-5999](tel:714-581-5999) or support@cncfactory.com

6. Log-in to your account.



Call us **714 581 5999**

[MACHINES](#) [PARTS](#) [SERVICE](#) [RESOURCES](#) [MORE](#) [LOG-IN](#)

Username or E-mail

joewoods.wurth@gmail.com

Password

[Show password](#)

☐ Keep me signed in

LOGIN

[No account? Register here.](#)

[Forgot your password?](#)

7. You will then see your Agent Dashboard. We will discuss each tab one-by-one in the next pages.

Home Tab Profile Tab My Customers Tab Resources Tab Social Media Links

Log in/Out Options

The screenshot shows the CNC Factory Agent Dashboard. At the top, the CNC Factory logo is on the left, and a navigation bar contains 'MACHINES', 'PARTS', 'SERVICE', 'RESOURCES', and 'MORE'. A 'Call us 714 581 5999' button is on the right. Below the navigation bar, a large banner says 'Welcome, Joe Woods!'. Underneath the banner are four tabs: 'HOME' (highlighted with a red underline), 'PROFILE', 'MY CUSTOMERS', and 'RESOURCES'. On the 'HOME' tab, there are two buttons: 'REGISTER A NEW CUSTOMER' and 'GENERATE A REFERRAL LINK'. Below these is a dark box containing a masked referral link 'XXXXXXXXXXXX' and two buttons: 'COPY' and 'VIEW PAGE'. On the right side of the dashboard, there is a 'YOUR BULLETIN' section with social media icons (YouTube, Instagram, Facebook, Twitter) and a welcome message. Below this is a 'No Bulletins to show' message. At the bottom right, there is a 'Bulletin Board' section with the text 'For any announcements related to your online account' and a link that says 'Click here if you need a copy of this guide.'

WELCOME, *Joe Woods!*

HOME PROFILE MY CUSTOMERS RESOURCES

REGISTER A NEW CUSTOMER

GENERATE A REFERRAL LINK

XXXXXXXXXXXX

COPY VIEW PAGE

YOUR BULLETIN

Welcome to CNC Factory! Please read [this](#) for a quick guide on using your dashboard. If you need help at any time, contact support@cncfactory.com or 714-581-5999.

No Bulletins to show

Bulletin Board
For any announcements related to your online account

Click here if you need a copy of this guide.

The HOME TAB lets you register customers and generate referral links. We'll get back to that in a bit.

THE PROFILE TAB

Contains controls for your Account Settings. Here you can:

- **Update your name & email**

Usernames can only be changed by the site admin. If you need to change this, we will need to reset your account. Contact us at 714-581-5999 to reset your account.

- **Change your password**

- **Edit privacy settings**

The screenshot shows the CNC Factory website's user profile page. At the top, the CNC Factory logo is on the left, and a navigation bar on the right includes links for MACHINES, PARTS, SERVICE, RESOURCES, and MORE, along with a phone icon and the text 'Call us 714 581 5999'. Below the navigation bar, a large banner area displays 'Welcome, Joe Woods!' on the left and a 'YOUR BULLETIN' section on the right. The bulletin section contains a welcome message and social media icons. A horizontal menu below the banner has four tabs: HOME, PROFILE (which is highlighted with a red underline), MY CUSTOMERS, and RESOURCES. The main content area of the PROFILE tab is a white box containing an 'Account' section. This section has a sidebar with icons for profile, password, and security. The main form fields include 'Username' (joewoods), 'First Name' (Joe), 'Last Name' (Woods), and 'E-mail Address' (joewoods.wurth@gmail.com). A red 'UPDATE ACCOUNT' button is at the bottom of the form.

CNC FACTORY

Call us **714 581 5999**

MACHINES ▾ PARTS ▾ SERVICE ▾ RESOURCES ▾ MORE ▾

Welcome, Joe Woods!

HOME PROFILE MY CUSTOMERS RESOURCES

Account

Username
joewoods

First Name
Joe

Last Name
Woods

E-mail Address
joewoods.wurth@gmail.com

UPDATE ACCOUNT

YOUR BULLETIN

Welcome to CNC Factory! Please read [this](#) for a quick guide on using your dashboard. If you need help at any time, contact support@cncfactory.com or 714-581-5999.

No Bulletins to show

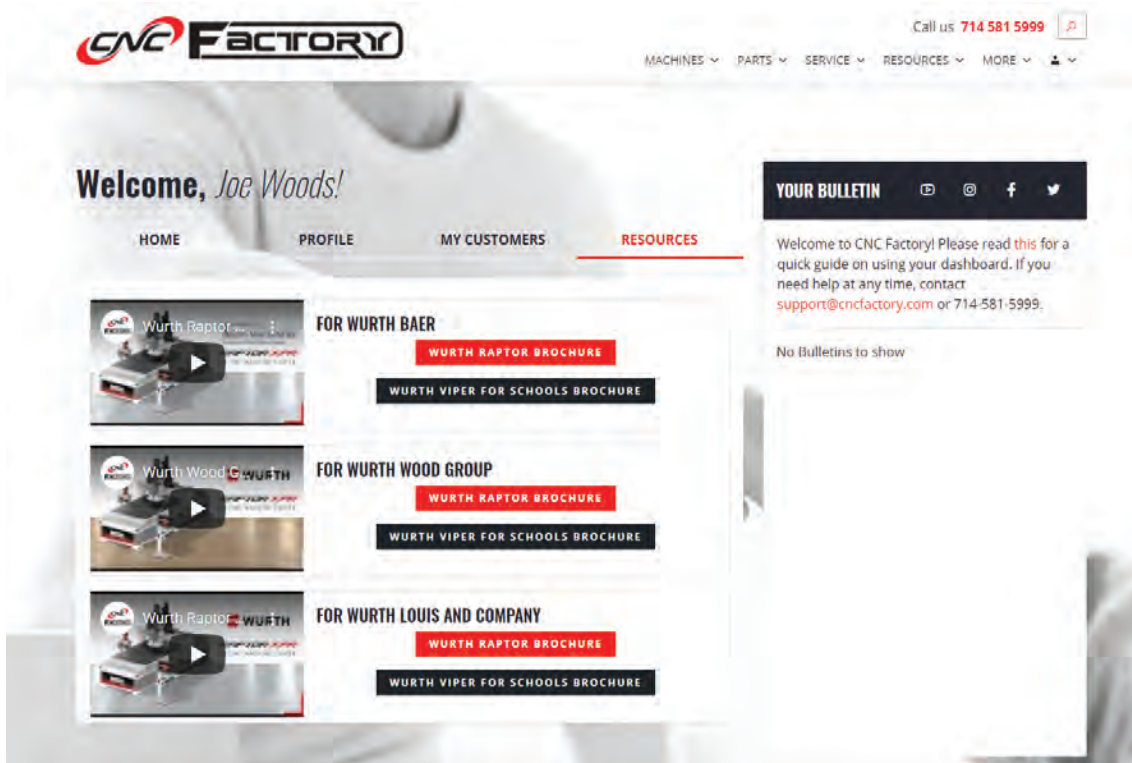
MY CUSTOMERS TAB

- Stores all information on your registered customers.
- Allows you to edit/delete customers.



RESOURCES TAB

- Contains the latest videos, brochures, and other media for Agents.



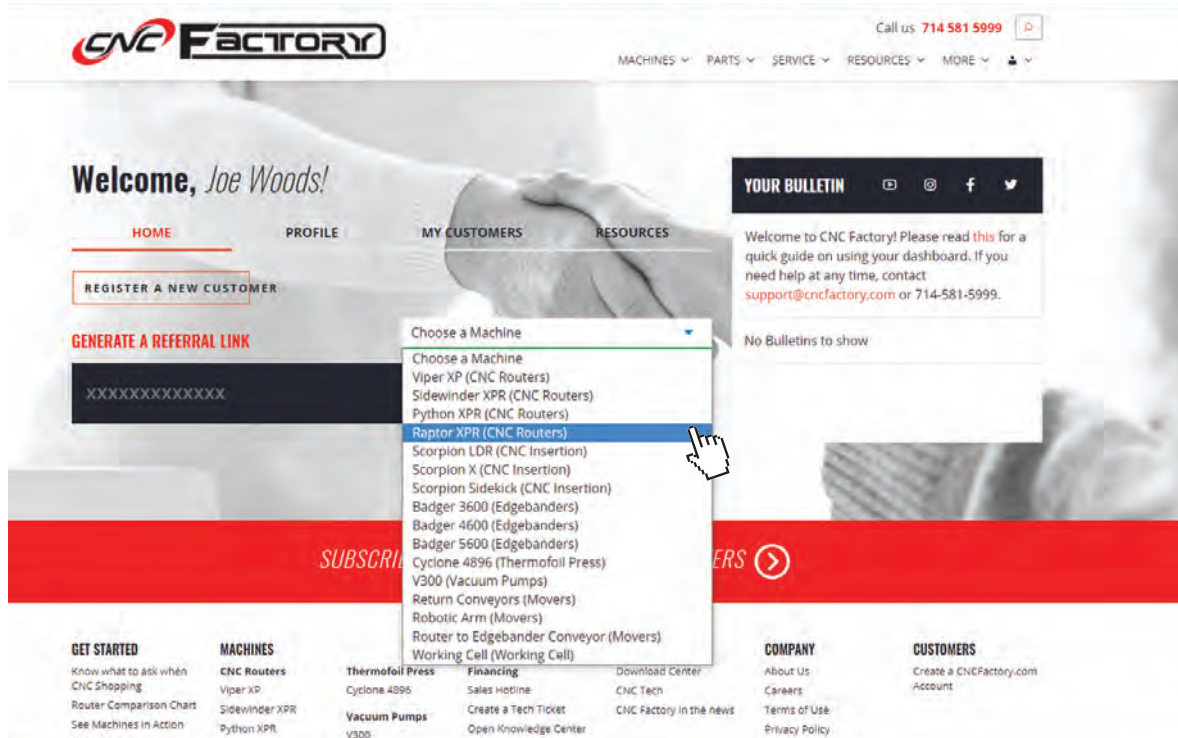
HOME TAB

Referral links

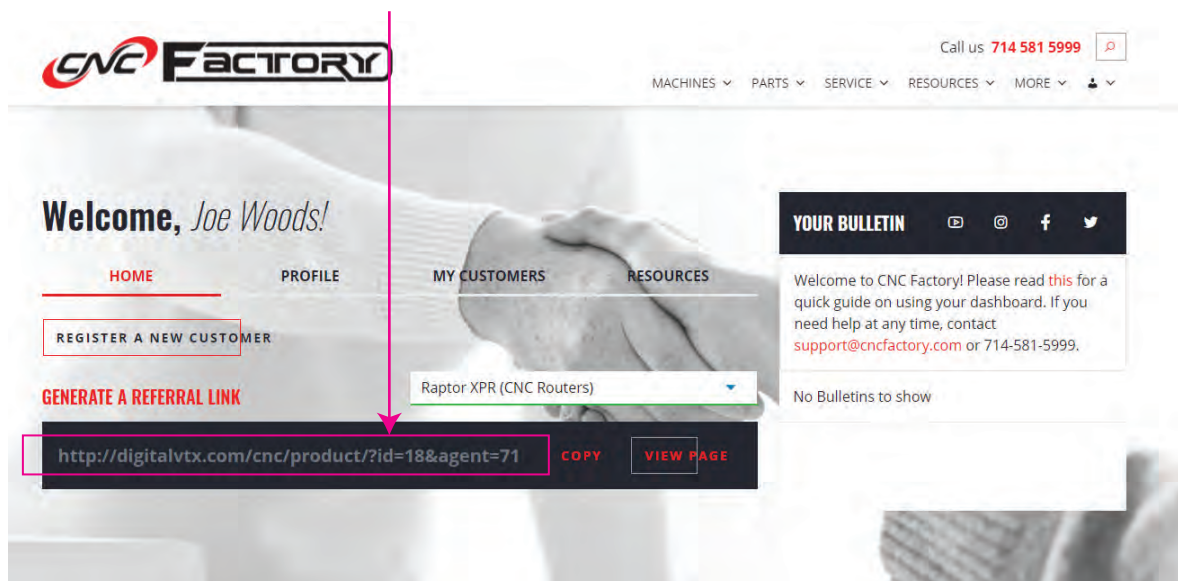
Referral links create customized product pages with your contact information, so prospects/customers you share them with are easily referred back to you.

1. Choose a Machine

From the dropdown, select a machine you'd like to share to a prospect.

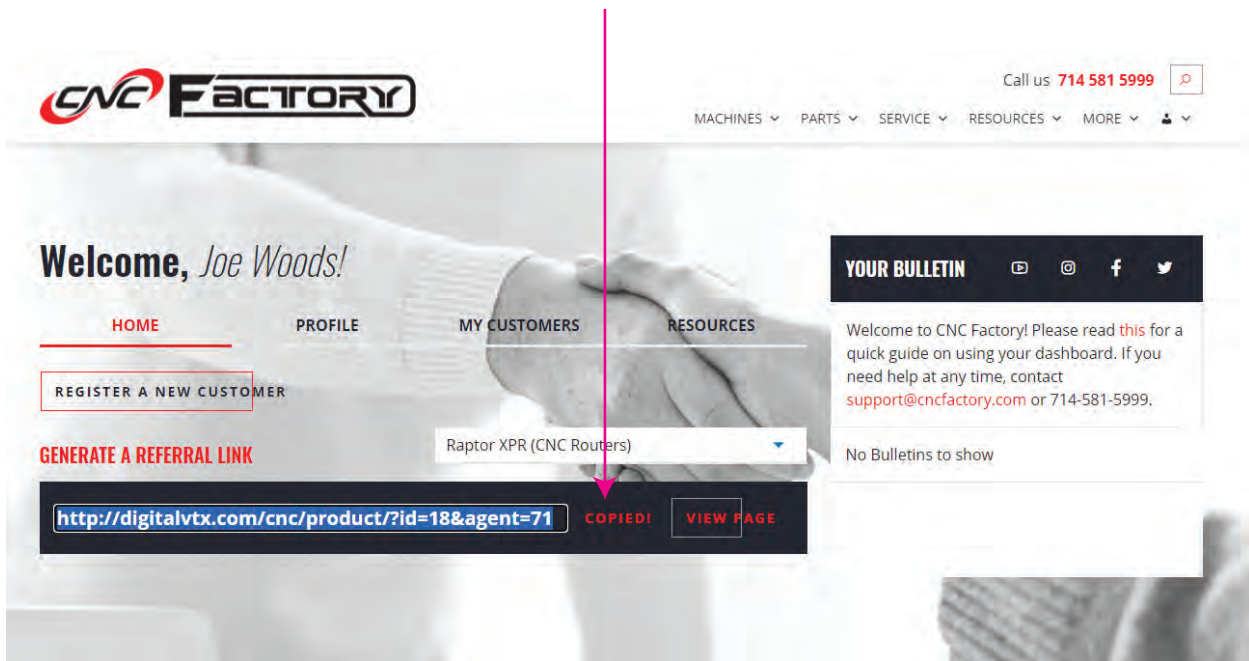


After selecting, a referral link is automatically generated



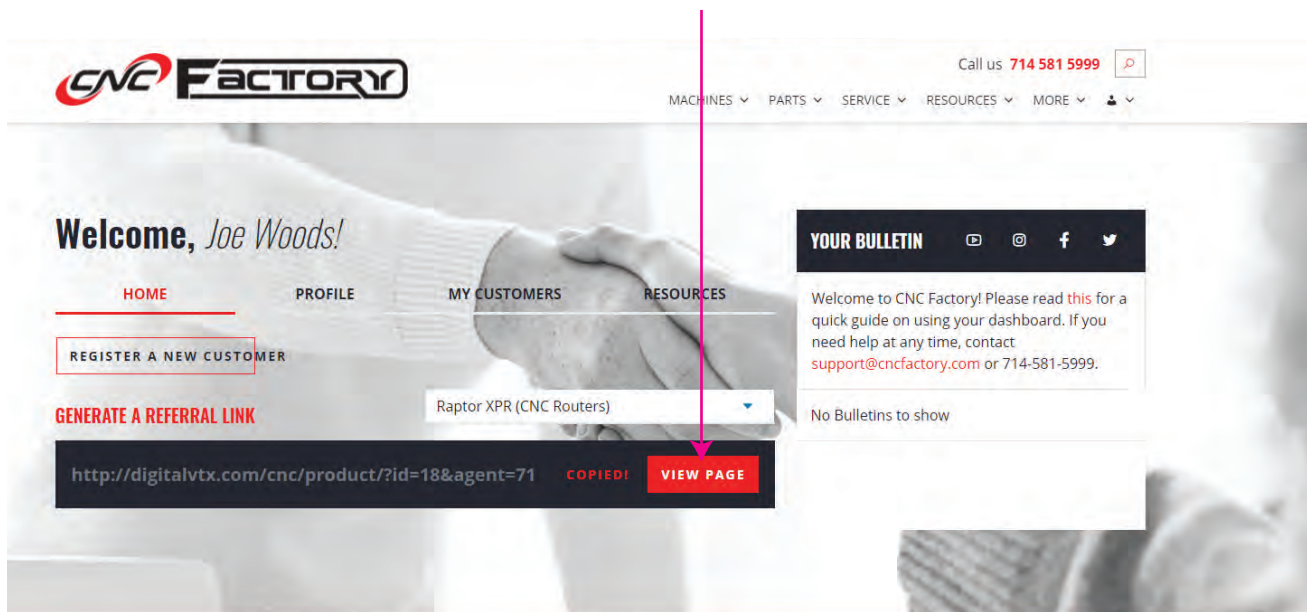
2. Copy the link

Click on COPY to copy the link. You may now share this link to your prospects via email or wherever you are pasting the link to.



3. Viewing the page

You may paste the link on your browser to view the page or click this VIEW PAGE button.



Driverless. Expandable. Longest CNC Warranty.

SHARE THIS



FAQ

It's designed to work in tandem with post-processing machines/conveyors under a complete CNC working cell.

Includes:

- V300 12HP Smart Vacuum Pump

©2011, All Rights Reserved. CMC Packer



The referral link you share will open to the page of a machine you selected....

...It will look like any standard page in the website, except for this part which contains your personal information.

The referral page will have a contact form for customers containing your information.

DO YOU HAVE ANY QUESTIONS?
Feel free to reach us:
Your Sales Agent is:

Agent Name: Joe Woods
Email ID: joewoods.wurth@gmail.com


First Name

Phone Number

Email Address

Company Name

Message

☐ I'm not a robot 

SUBMIT

All submissions to this form will go directly to the email you provided.

DO YOU HAVE ANY QUESTIONS?
Feel free to reach us:
Your Sales Agent is:

Agent Name: Joe Woods
Email ID: joewoods.wurth@gmail.com


First Name
Kyle

Phone Number
7141234567

Email Address
kylewoodcrafts@gmail.com

Company Name
Kyle Wood Crafts

Message
I want to discuss more how this machine can be setup in my shop. Please call me

☒ I'm not a robot 

SUBMIT

New query from your CNC Factory agent account inbox

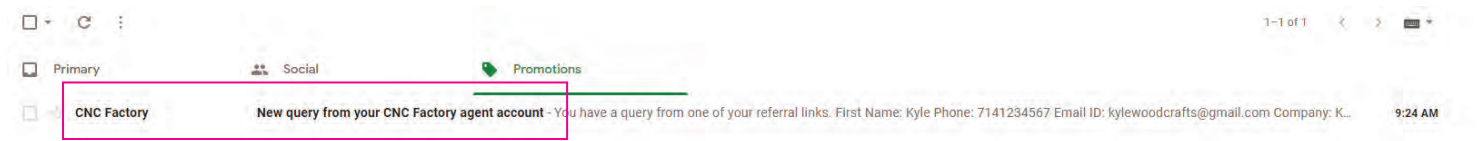
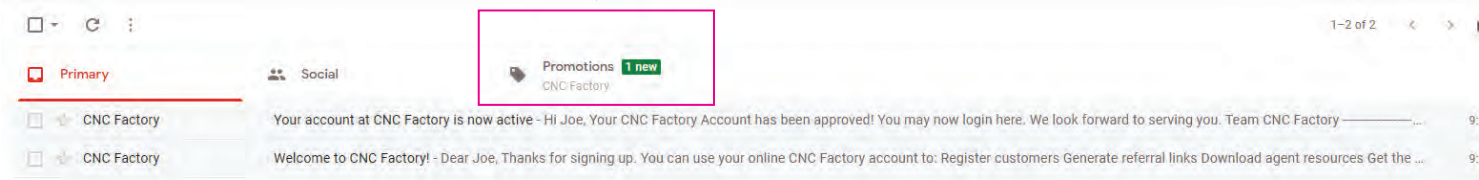
CNC Factory <noreply@cncfactory.com>
to me

9:24 AM (7 minutes ago) ☆ ↶ ⋮

You have a query from one of your referral links.

First Name: Kyle
Phone: 7141234567
Email ID: kylewoodcrafts@gmail.com
Company: Kyle Wood Crafts
Message: I want to discuss more how this machine can be setup in my shop. Please call me

Depending on your email provider, the submissions may go to your Promotions or Spam folder. Make sure to check them and mark these messages as Not Spam.

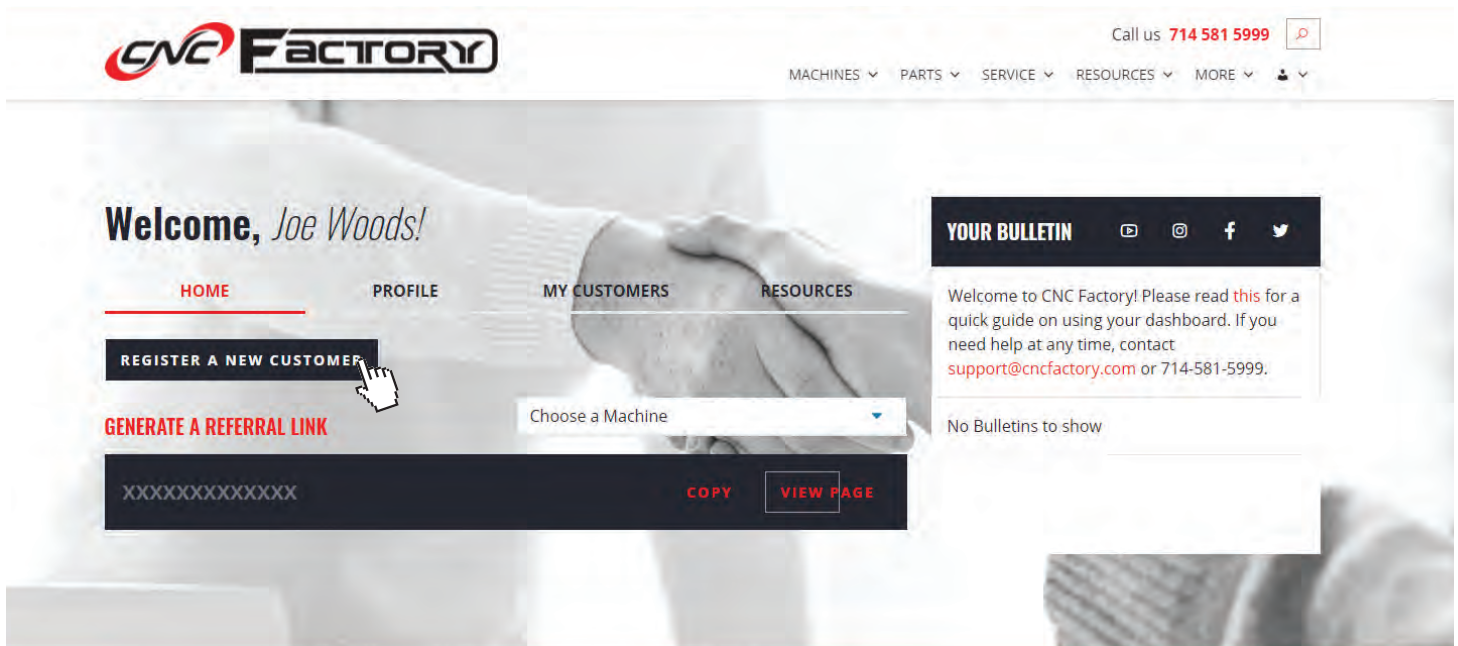


HOME TAB

Register a New Customer

This button lets you store information/notes about your prospects. Registering them also creates an online account for them so they can easily save online quotations on any of our machines.

1. Click on REGISTER A NEW CUSTOMER



10% OFF ON ALL PARTS WITH CODE "SHOWSPECIAL" [GO TO STORE](#)

ADD NEW CUSTOMER

First Name *	Kyle
Last Name *	Smith
Email Address *	kylewoodcrafts@gmail.com
User Login ID *	kylesmith
User Password *	*****
Phone *	7141234567

Notes

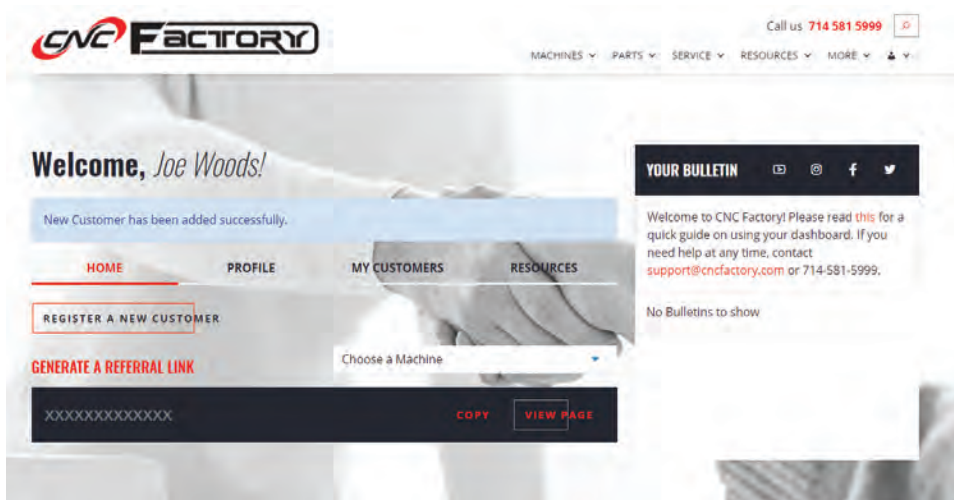
Interested in the Raptor XPR 4x10. Cuts mostly cabinets.
May need an extra vacuum pump due to high elevation.
Looking for lead time of 12 weeks.

[ADD](#) [CLOSE](#)

Enter your customer's info.

The User Login ID & User Password you set will be your customer's log-in credentials for their online account. Make sure to make note of these and send to them after. They will be able to change their passwords later.

Click ADD to submit.

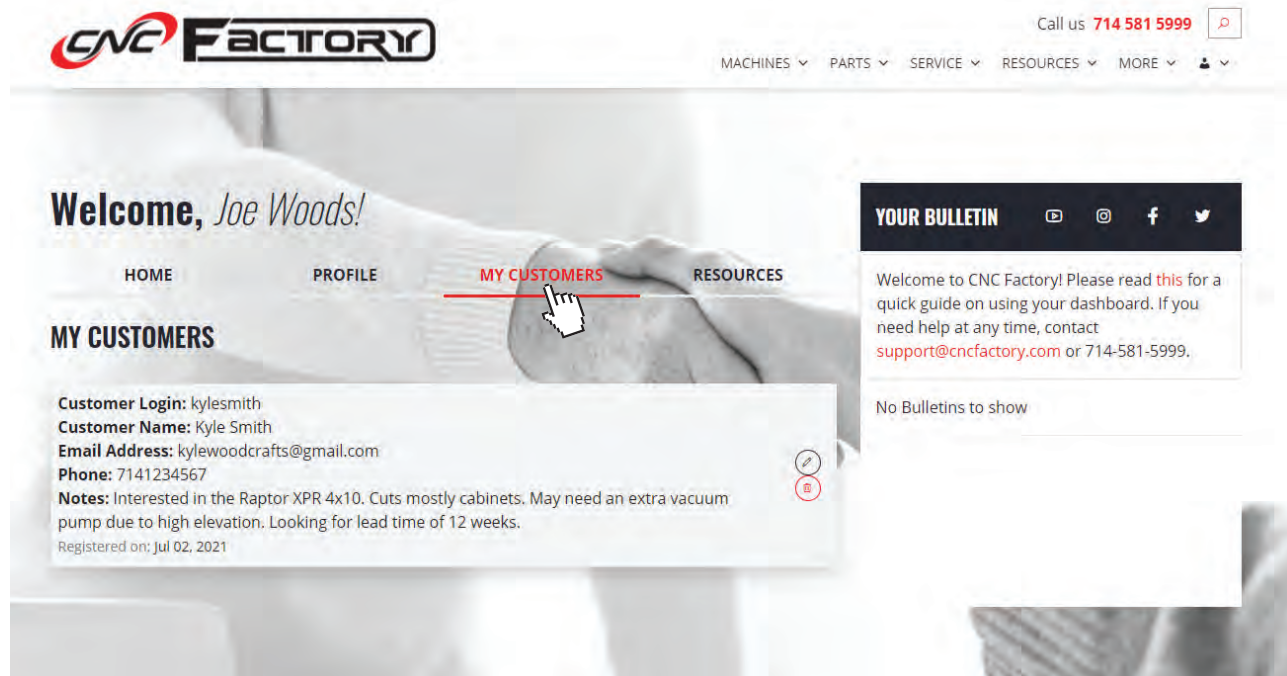


You will receive this success message after.

If your customer has already created an account with the email you provided, you will receive an error message since duplicate emails are not allowed.

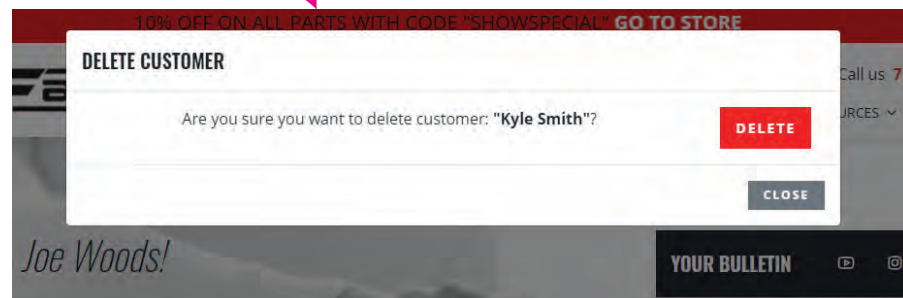
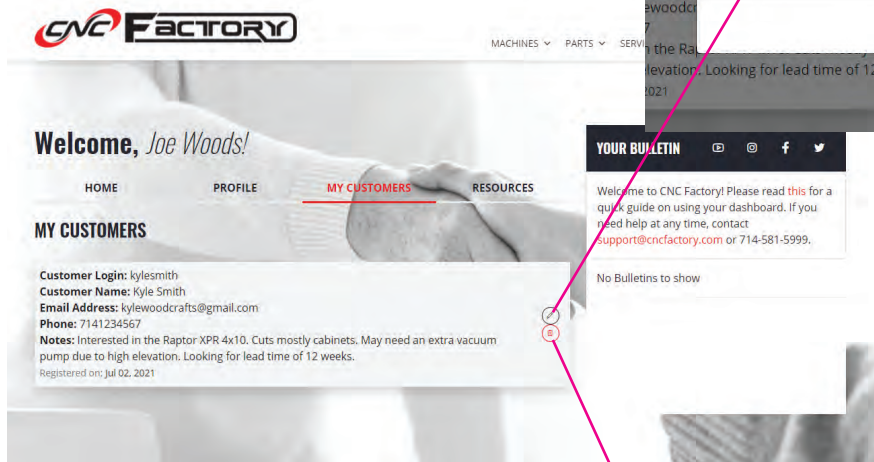
2. View Customer Info

Once added, go to the MY CUSTOMER Tab to view your registered customers.



3. Edit/Delete

Click on the buttons as shown to edit customer info or delete their accounts permanently.



3. Logging-out

Click on the account icon and the "Logout" link.

