Course 1
With Opportunity Tracking

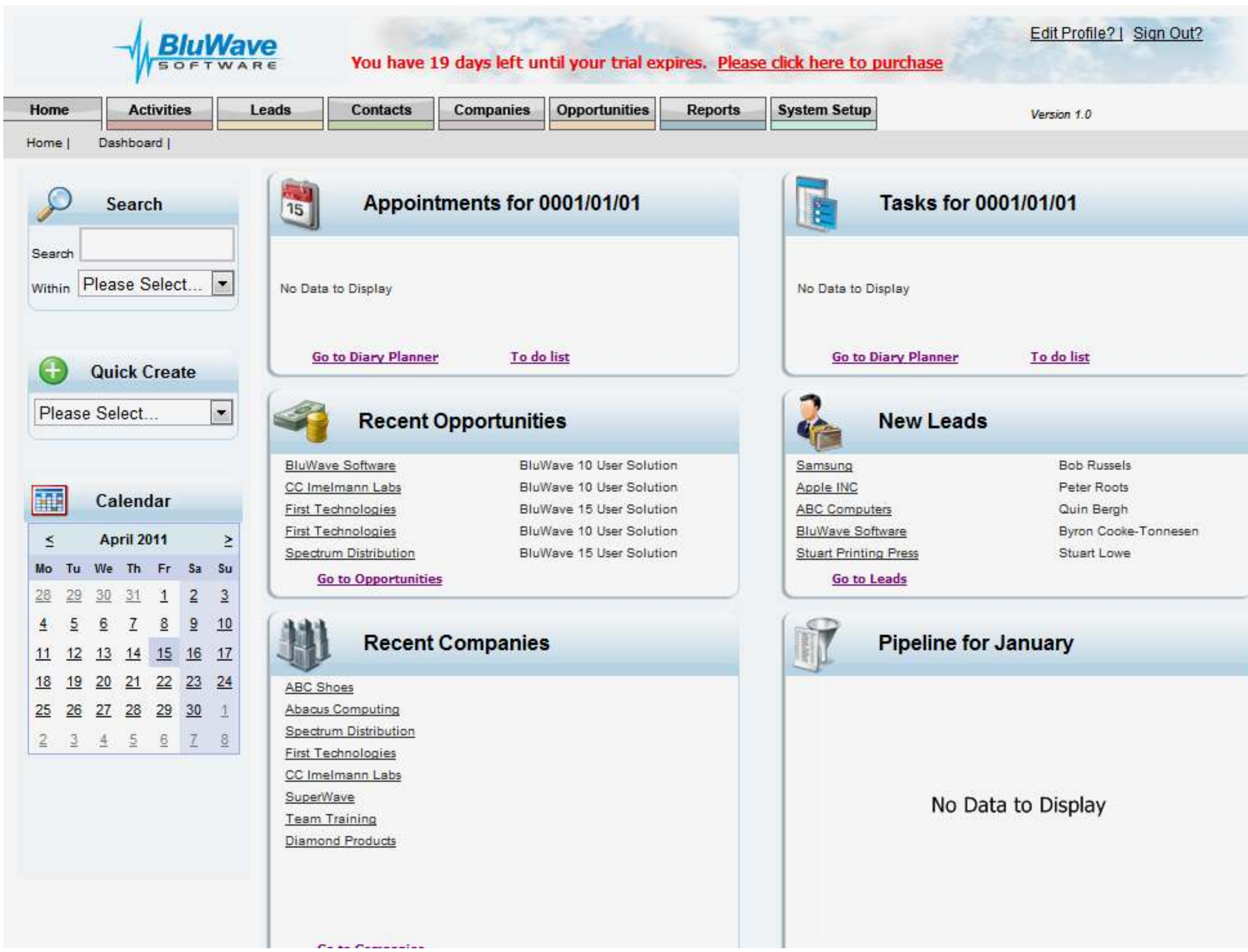
Training

Time: 2 hours

COURSE CONTENT

1. System Overview

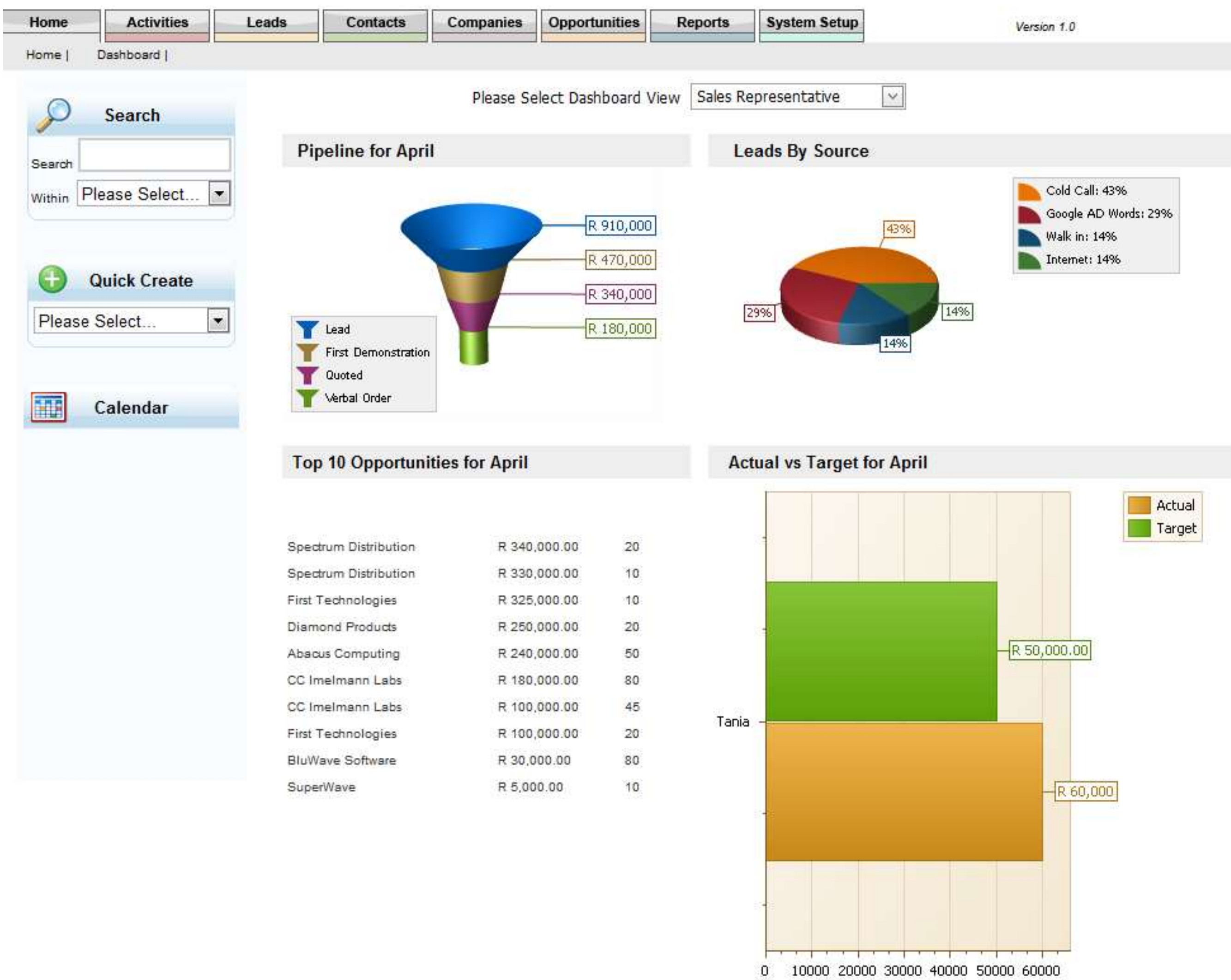
When you login you will land on the Home page.

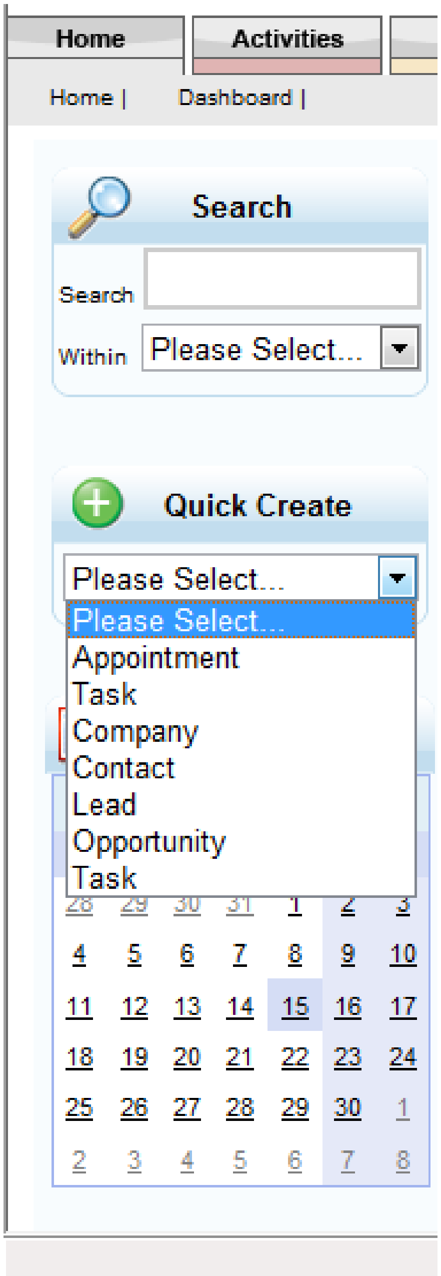


You can navigate to appointments, tasks, and opportunities from here. You can also view companies added recently and view a graphic display of your pipeline.

Use the buttons at the top of the page to navigate.

Dashboard



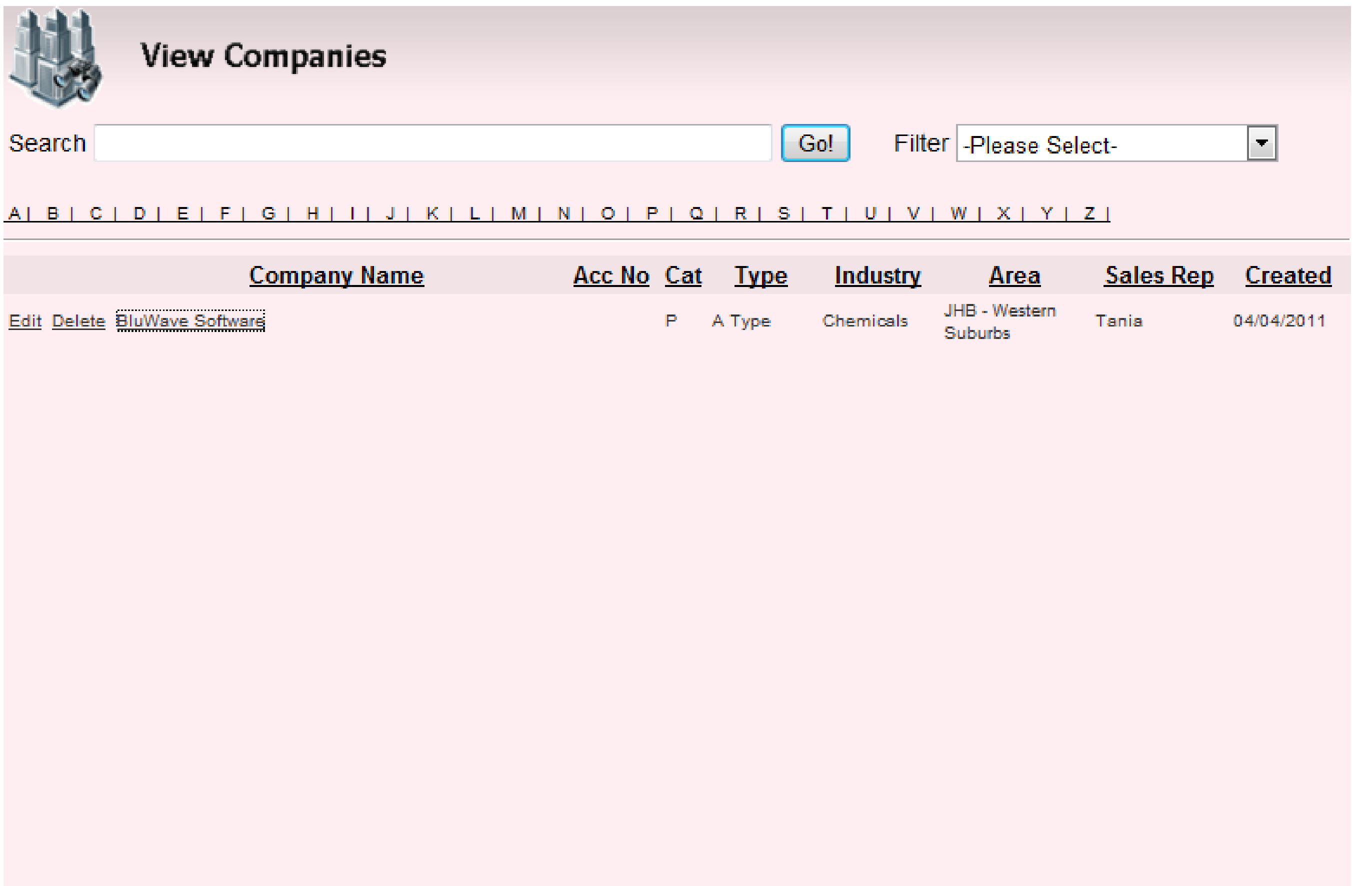


You can use Quick Create to jump to the relevant screen to create a new Appointment, Task, Company, Contact, Lead or Opportunity.

2. View Companies

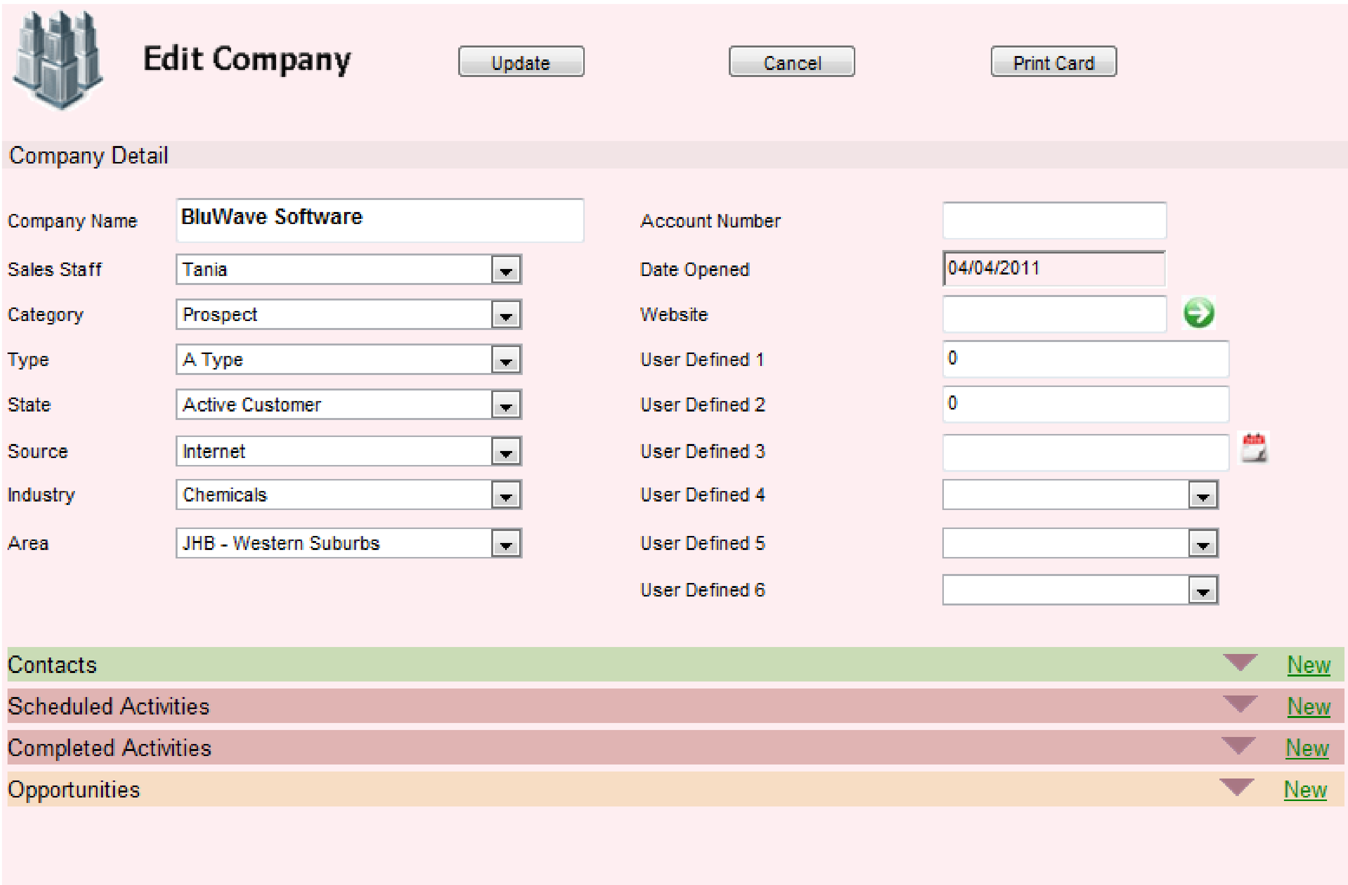
<u>Use View Companies Screen to:</u>

- Search for the company name to view the details of that client.
- Add new Clients to the database. Note: Only Administrators can delete Clients from the database.



Click on the Company name to edit that company or click on the word Edit. Click on the work Delete to remove the company from the database.

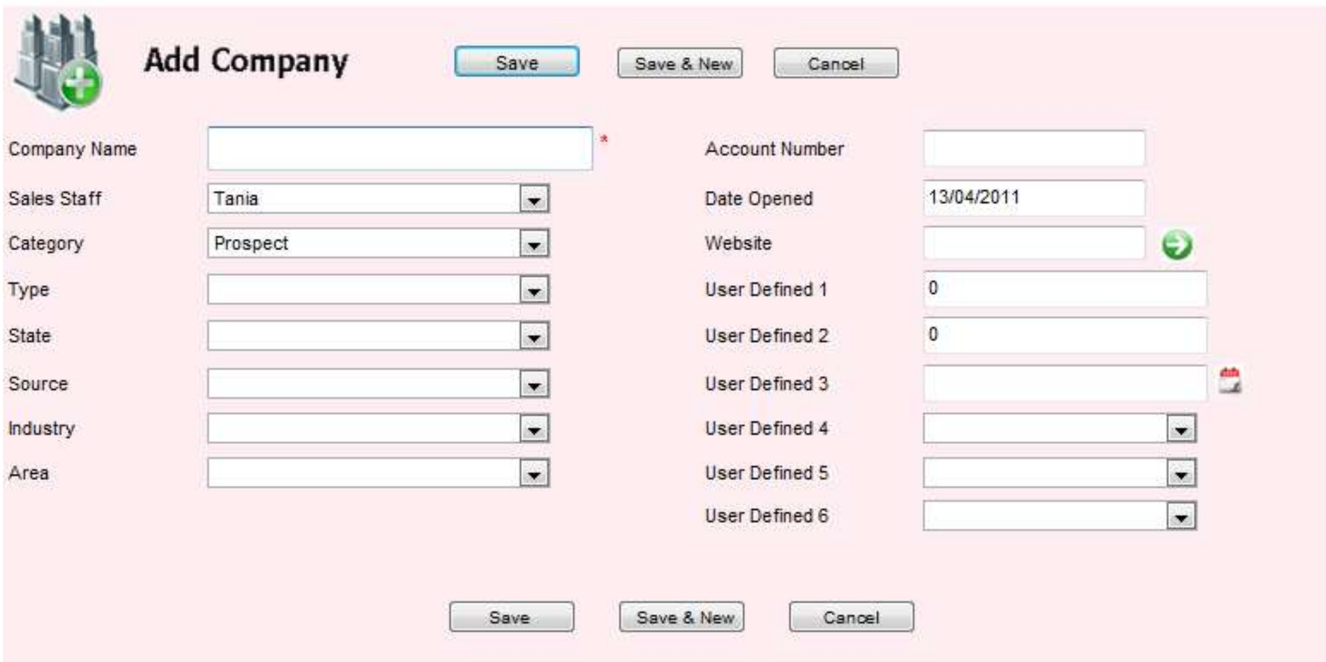
Edit Company



- Make the necessary changes to the company details and click the Update button.
- You can view the contacts, activities and opportunities assigned to this company by clicking on the down arrow.
- You can also add new contacts, activities and opportunities by clicking on the word New.

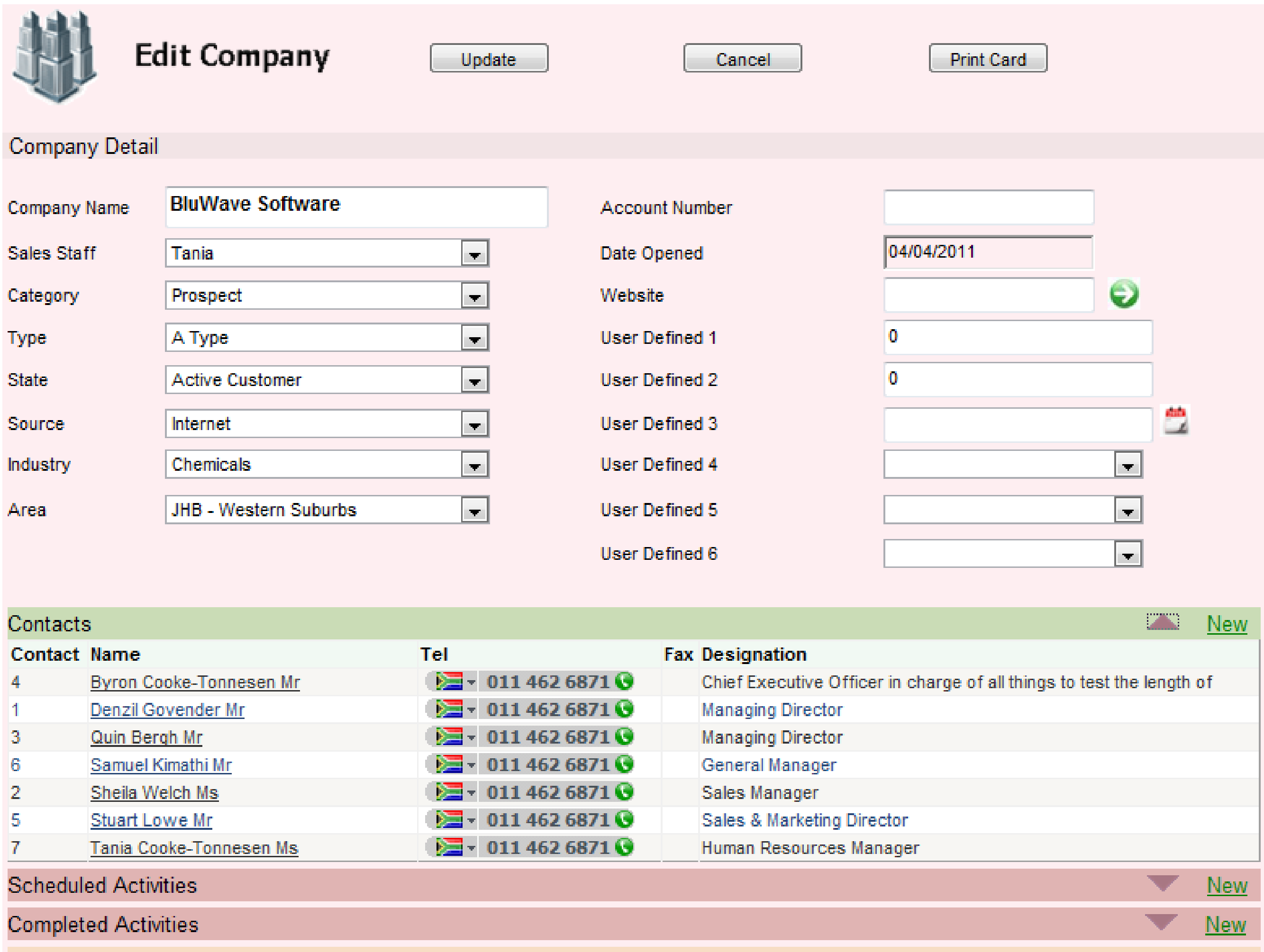
Add Company

Click on Add New Company to add a new prospect or customer.



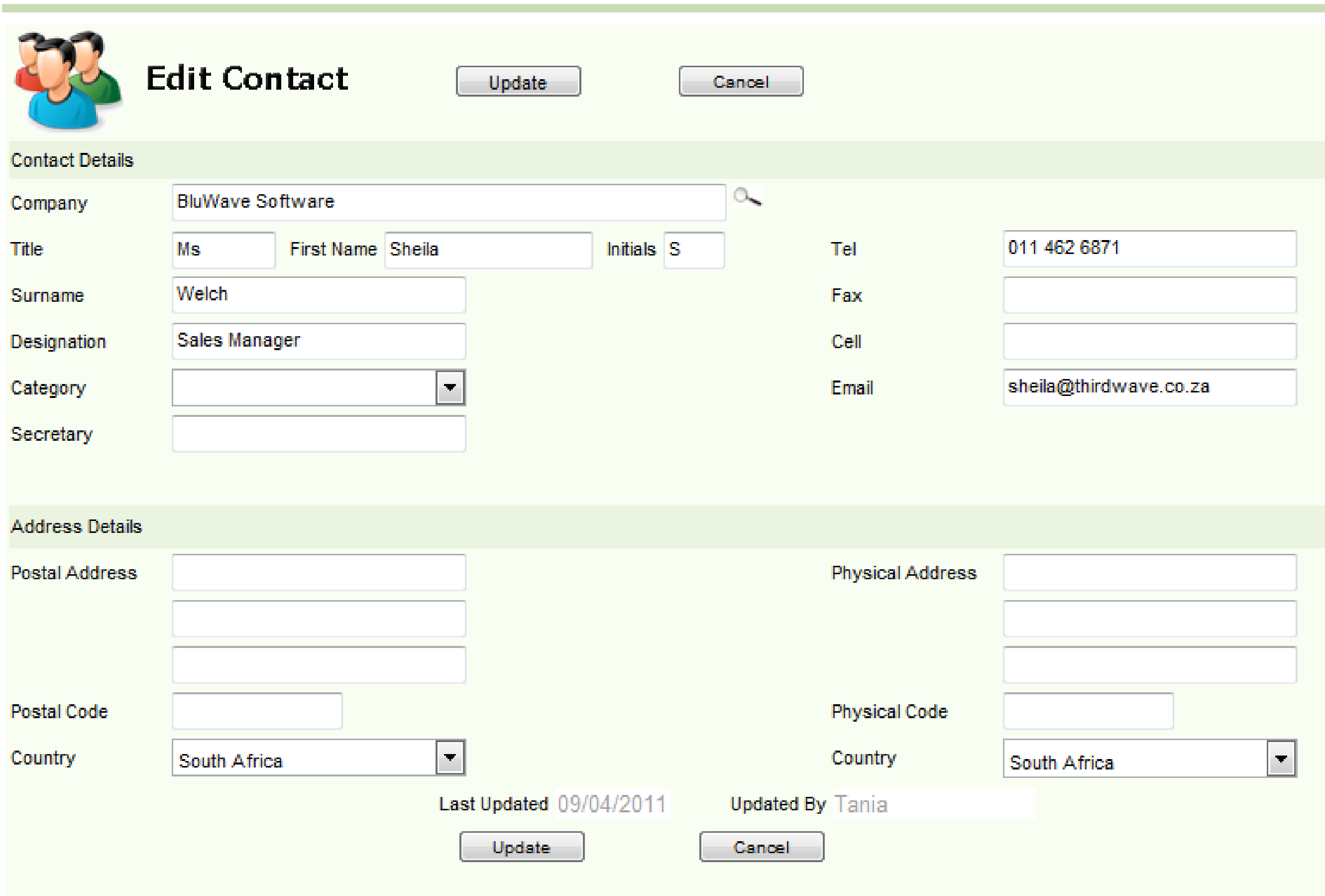
- Indicate whether this Client is a <u>Prospect</u> or a <u>Customer</u> .by using the category field
- There are 6 user defined fields. These fields are indicated and set-up by your Administrator.
- NB! Categorise a client database using the category field. Customers should be broken down by value or potential value into for example: A, B and C type customers and VARs and distributors.

2.1 The Contact List



- Expand the Contact list by clicking on the down arrow in the same line.
- Click on the contact in order to open the contact editing form.
- Click on the new button to add a new contact.

2.2 Edit the Contact

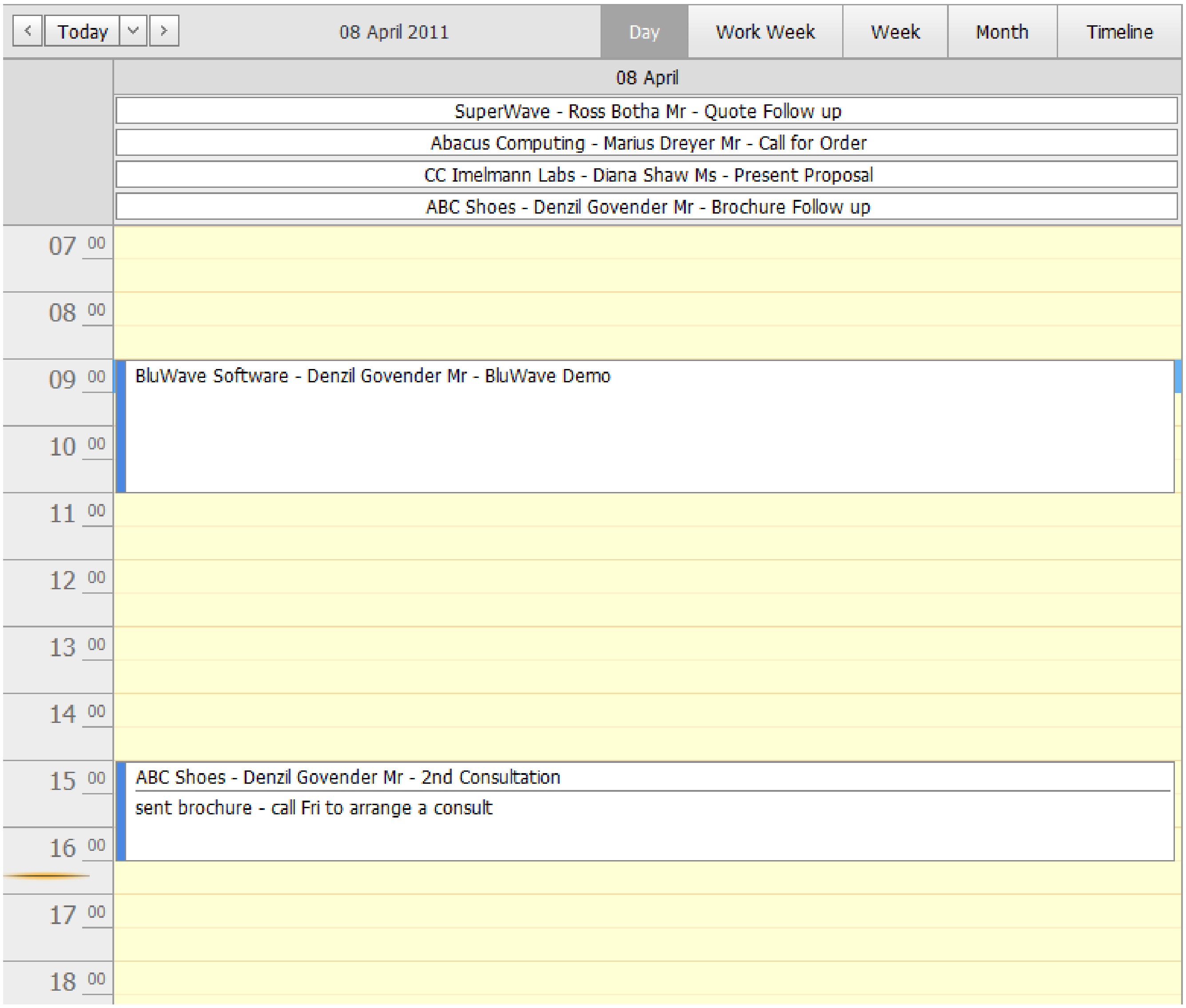


- Make your changes to the contact and click on the Update button.

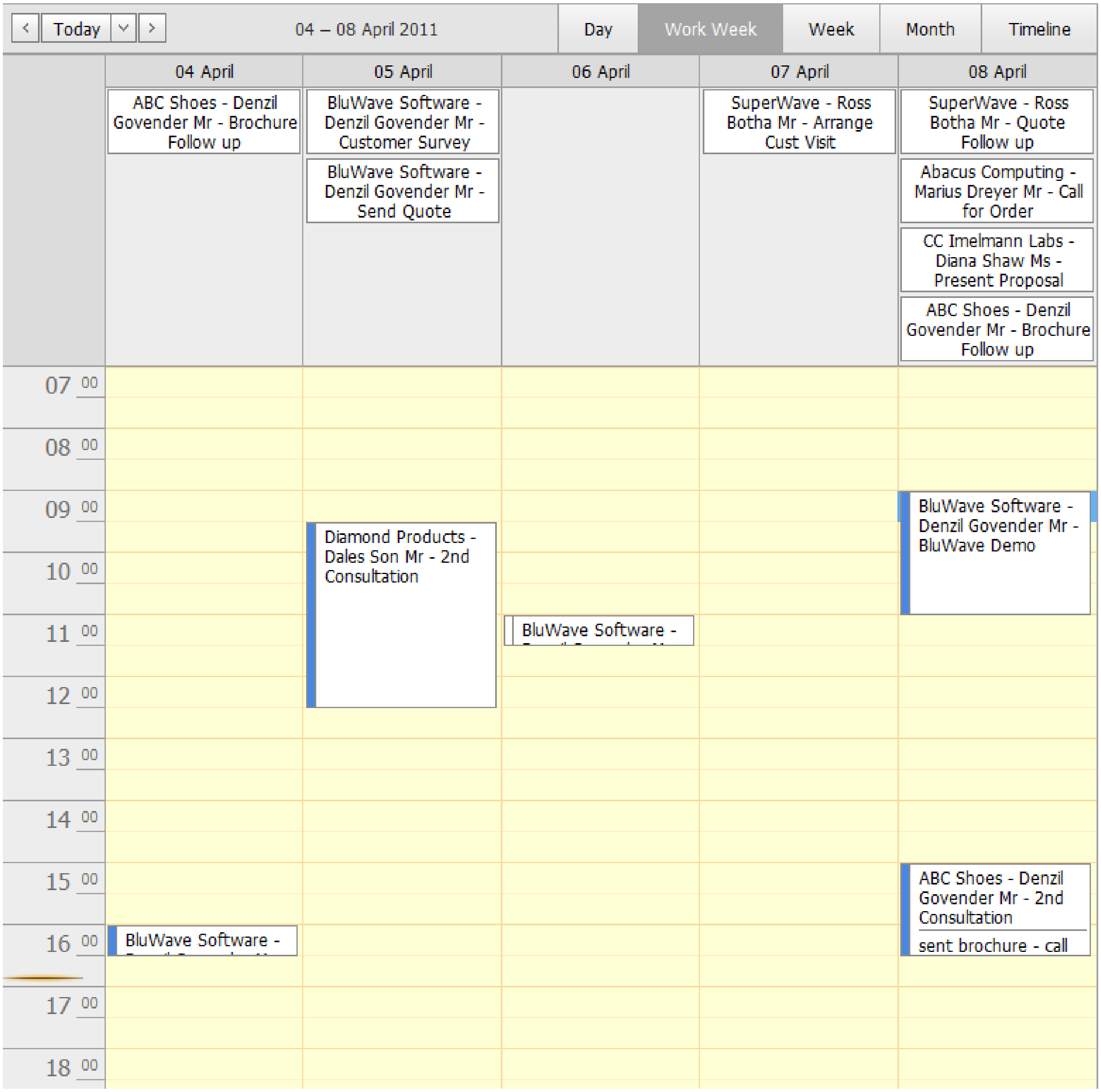
3. Diary Planner

These views show the appointments for the day in the yellow section and the tasks at the top in the grey section. You can view your diary for a day, week or month.

Day View



Week View


Today
04 – 08 April 2011
Day
Work Week
Week
Month
Timeline
04 April
05 April
06 April
07 April
08 April
ABC Shoes - Denzil Govender Mr - Brochure Follow up
BluWave Software - Denzil Govender Mr - Customer Survey
BluWave Software - Denzil Govender Mr - Send Quote
SuperWave - Ross Botha Mr - Arrange Cust Visit
SuperWave - Ross Botha Mr - Quote Follow up
Abacus Computing - Marius Dreyer Mr - Call for Order
CC Imelmann Labs - Diana Shaw Ms - Present Proposal
ABC Shoes - Denzil Govender Mr - Brochure Follow up
07 00
08 00
09 00
10 00
11 00
12 00
13 00
14 00
15 00
16 00
17 00
18 00
Diamond Products - Dales Son Mr - 2nd Consultation
BluWave Software -
BluWave Software - Denzil Govender Mr - BluWave Demo
ABC Shoes - Denzil Govender Mr - 2nd Consultation
sent brochure - call
BluWave Software -

Month View


Today
April – May 2011
Day
Work Week
Week
Month
Timeline
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday/Sunday
04 April
ABC Shoes - Denzil Govender Mr - Brochure Follow up
16:00 16:30 BluWave Software Denzil Govende Mr - Call t Demo (Bryanst
5
BluWave Software - Denzil Govender Mr - Customer Survey
BluWave Software - Denzil Govender Mr - Send Quote
09:30 12:30 Diamond Products Dales Soi Mr - 2nd Consultat
6
11:00 11:30 BluWave Software - Denzil Govende Mr - BluWave Demo (Office)
7
SuperWave - Ross Botha Mr - Arrange Cust Visit
8
SuperWave - Ross Botha Mr - Quote Follow up
Abacus Computing - Marius Dreyer Mr - Call for Order
CC Imelmann Labs - Diana Shaw Ms - Present Proposal
ABC Shoes - Denzil Govender Mr - Brochure Follow up
Show more
9
Show more
10
11
BluWave Software - Sheila Welch Ms - BluWave Demo
14:30 16:00 Abacus Computir Marius Dreyer M 2nd Consultat
12
13:30 15:30 BluWave Software - Samuel Kimathi Mr - BluWave Demo
13:30 15:30 BluWave Software - Samuel Kimathi Mr - BluWave Demo
13
14
09:00 11:00 First Technolc - Byron Cooke M 2nd Consultat
15
16
17
18
BluWave Software - Byron Cooke-Tonnesen Mr - Call for Demo
19
20
21
22
23
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25
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01 May
2
3
4
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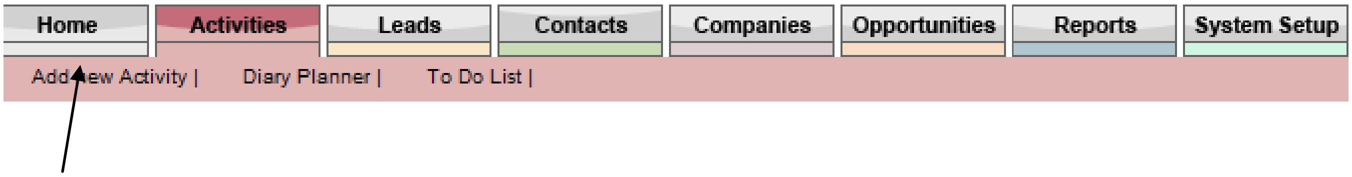
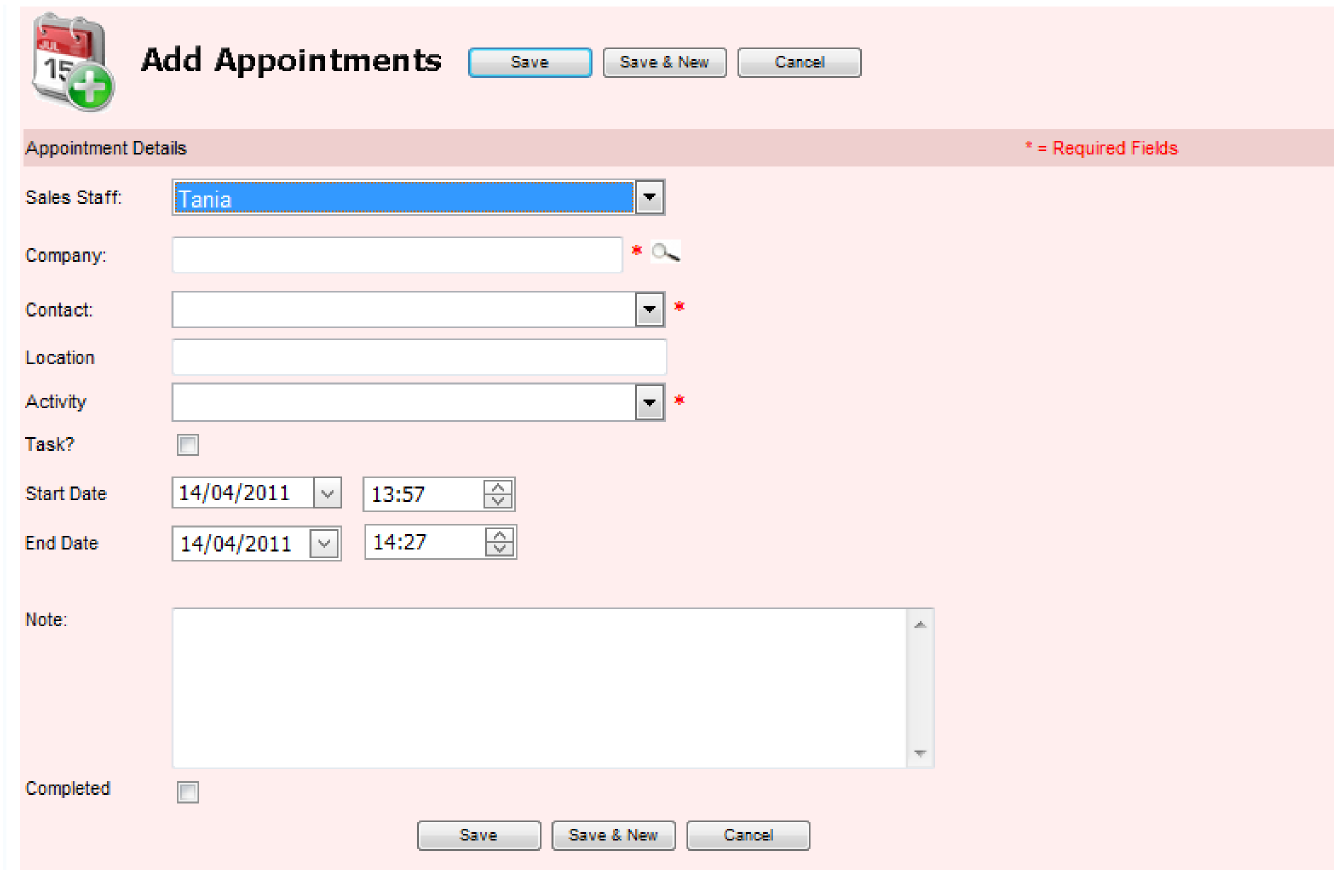
7
8

4. Managing your Activities



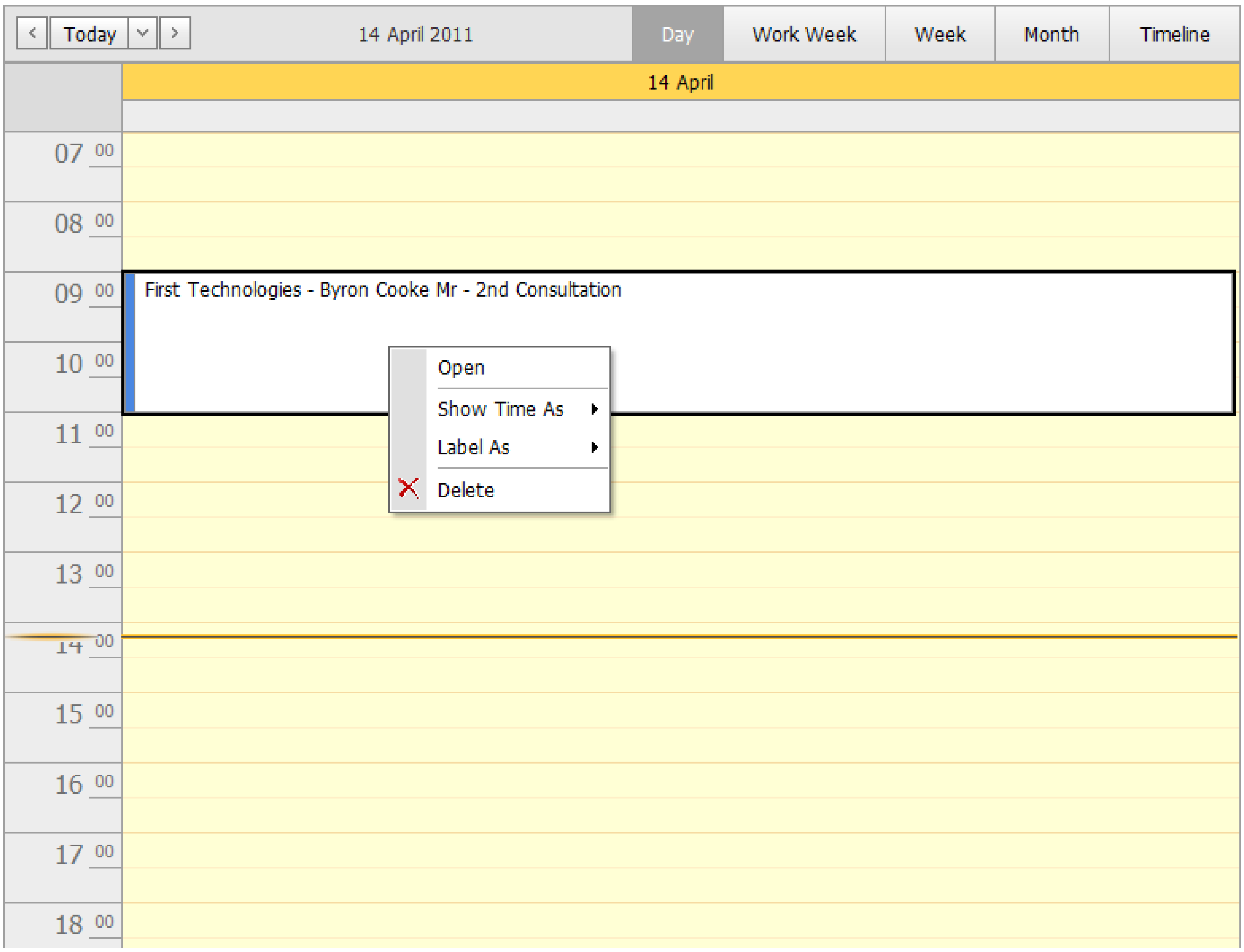
Click on Add New Activity to schedule a task or appointment.



- Select the company and contact person the activity relates to.
- Type the location of the activity.
- Select the type of Activity
- Tick the task box if this is a task and not an appointment. If this is an appointment, select the date and time.
- Type a note for the activity if required.
- Click on the save button. If you wish to create another activity click on the save & close button.

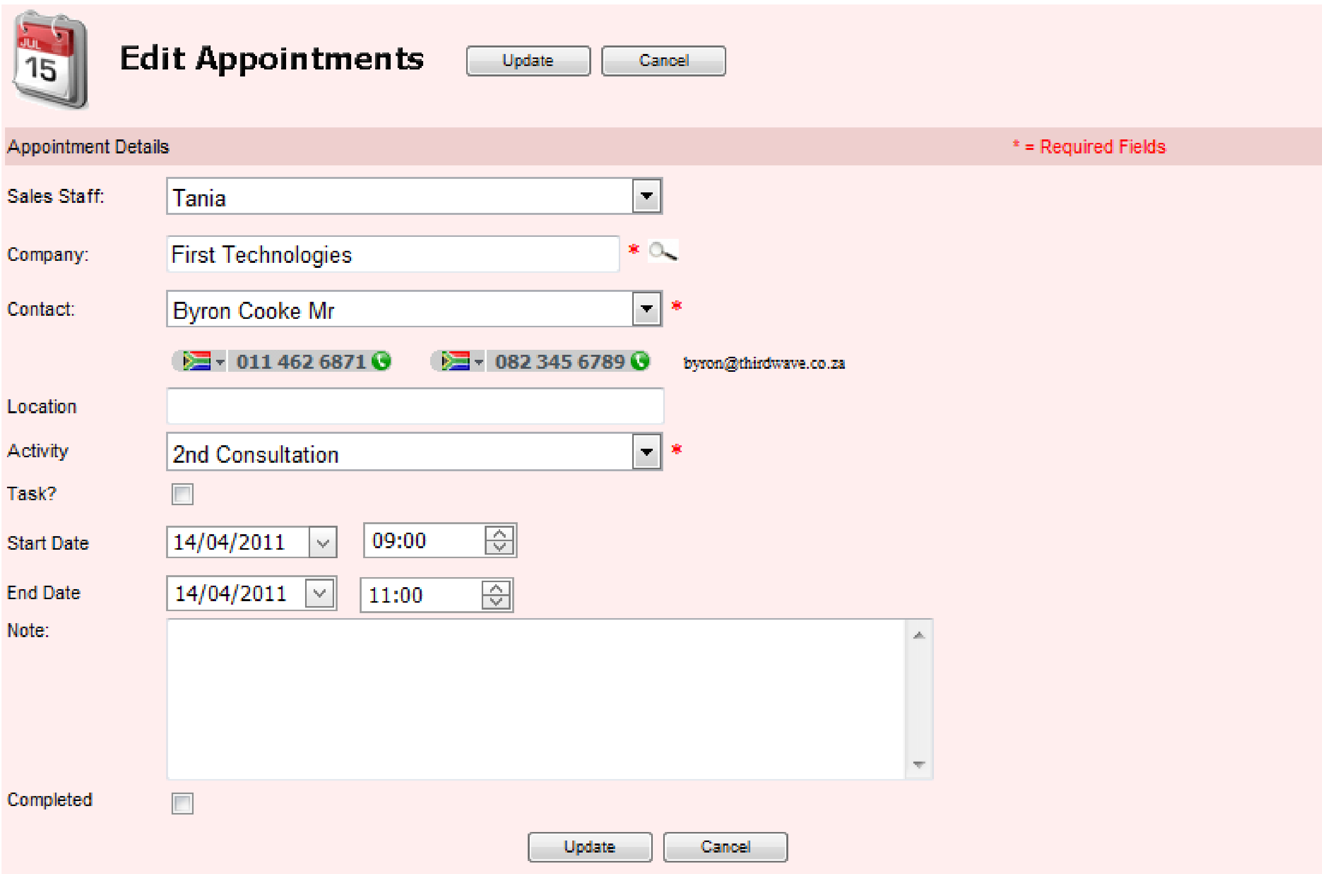
Edit an Activity

Click on Diary Planner to edit a task or appointment.

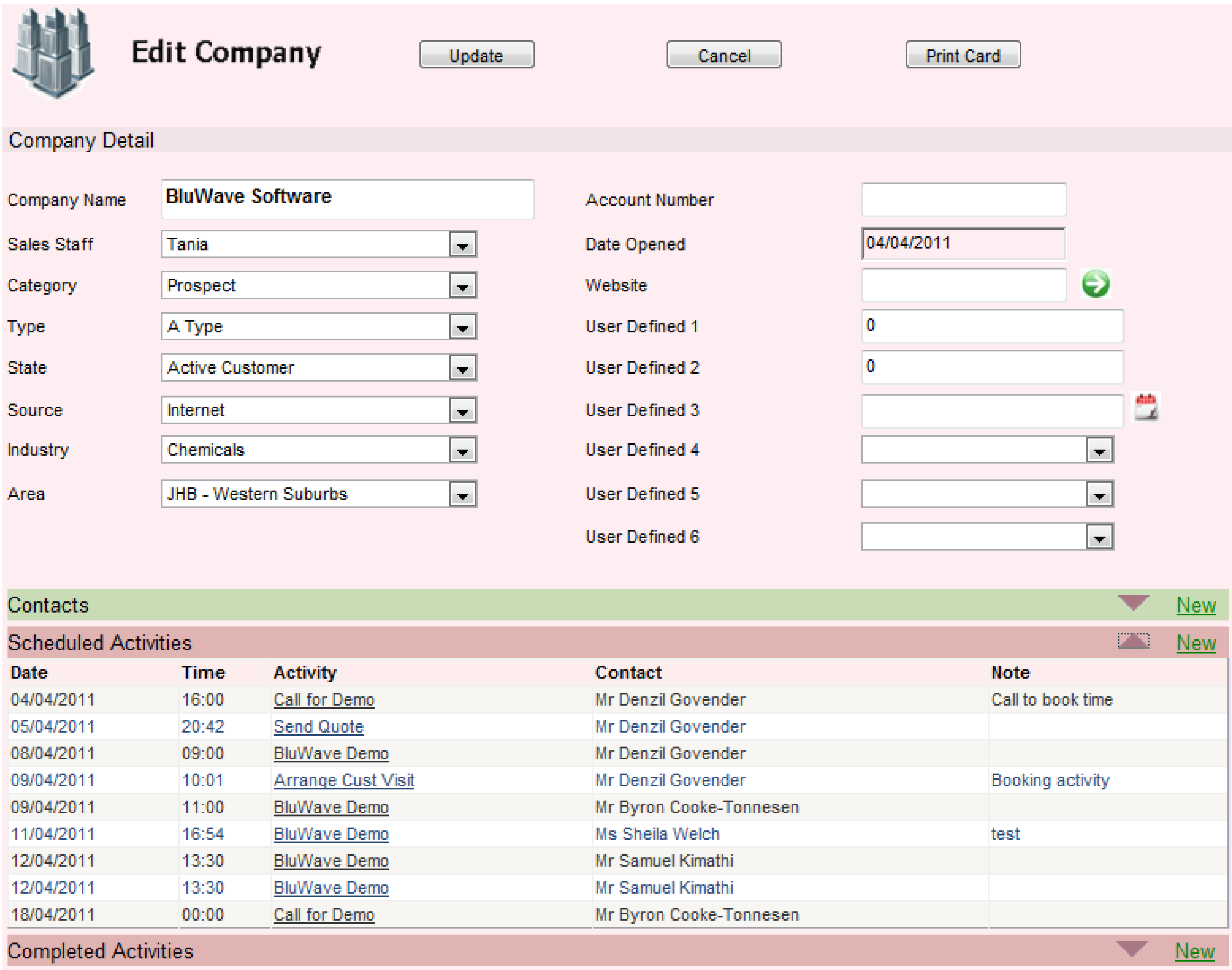


Right click on the activity and select Open

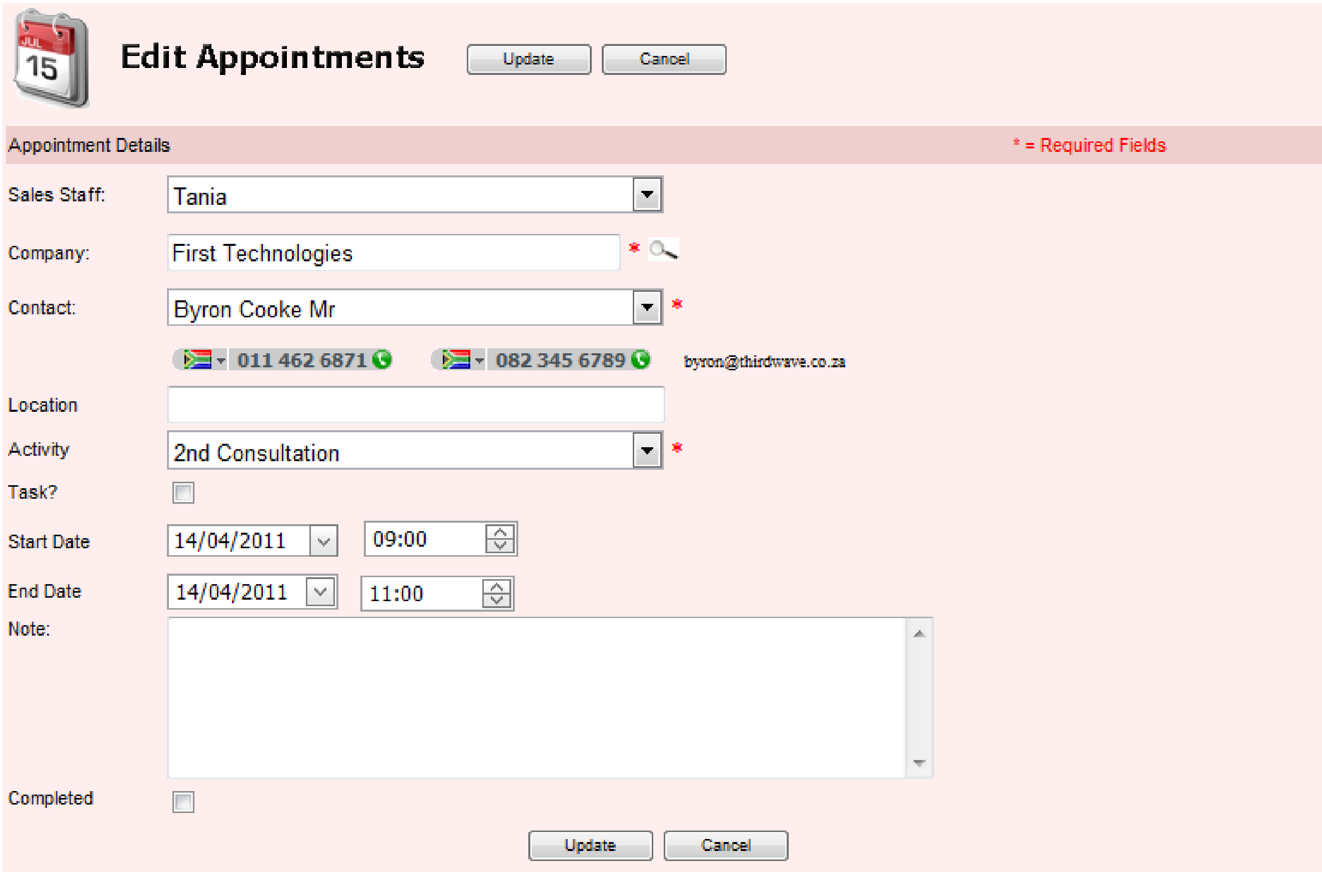
Make the necessary changes and click on the Update button.



You can also edit an activity from the company tab. Expand the Scheduled Activities list and click on the activity you wish to edit. It will open the same screen as above.



Completing your Activities



Edit the Activity in the usual way, tick the completed box and click on the Update button.

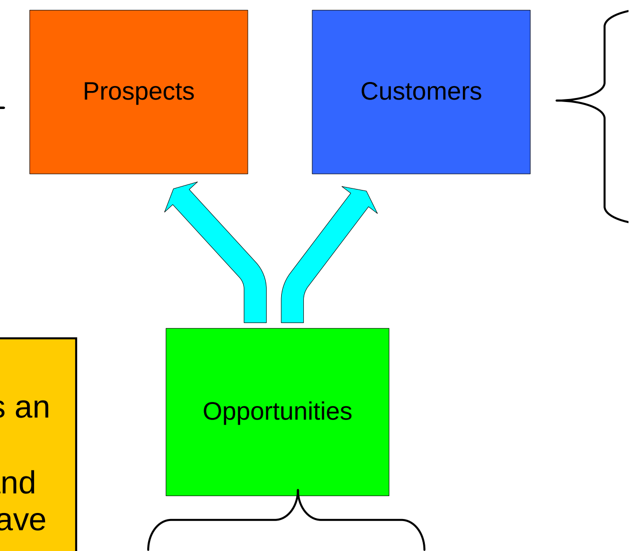
OPPORTUNITY TRACKING

Prospect - A Client you are trying to sell to.
Customer – A Client you have already sold to.
Opportunity – A deal which has a value and status which could be for a Prospect or a Customer.

Types of Statuses

Prospects

- Active
- Inactive



Customers

- A – Type
- B – Type
- C – Type
- Dormant
- Lost

Key Note:

- An Opportunity is an active Sale
- Both prospects and customers can have opportunities
- There can be multiple opportunities per prospect or customer

Opportunities

- Lead
- First contact
- Presented
- Quote Submitted
- Awaiting Budget Approval
- Verbal Order
- Ordered/Sold
- Lost
- Lost To Competitor

5. Opportunity Tracking

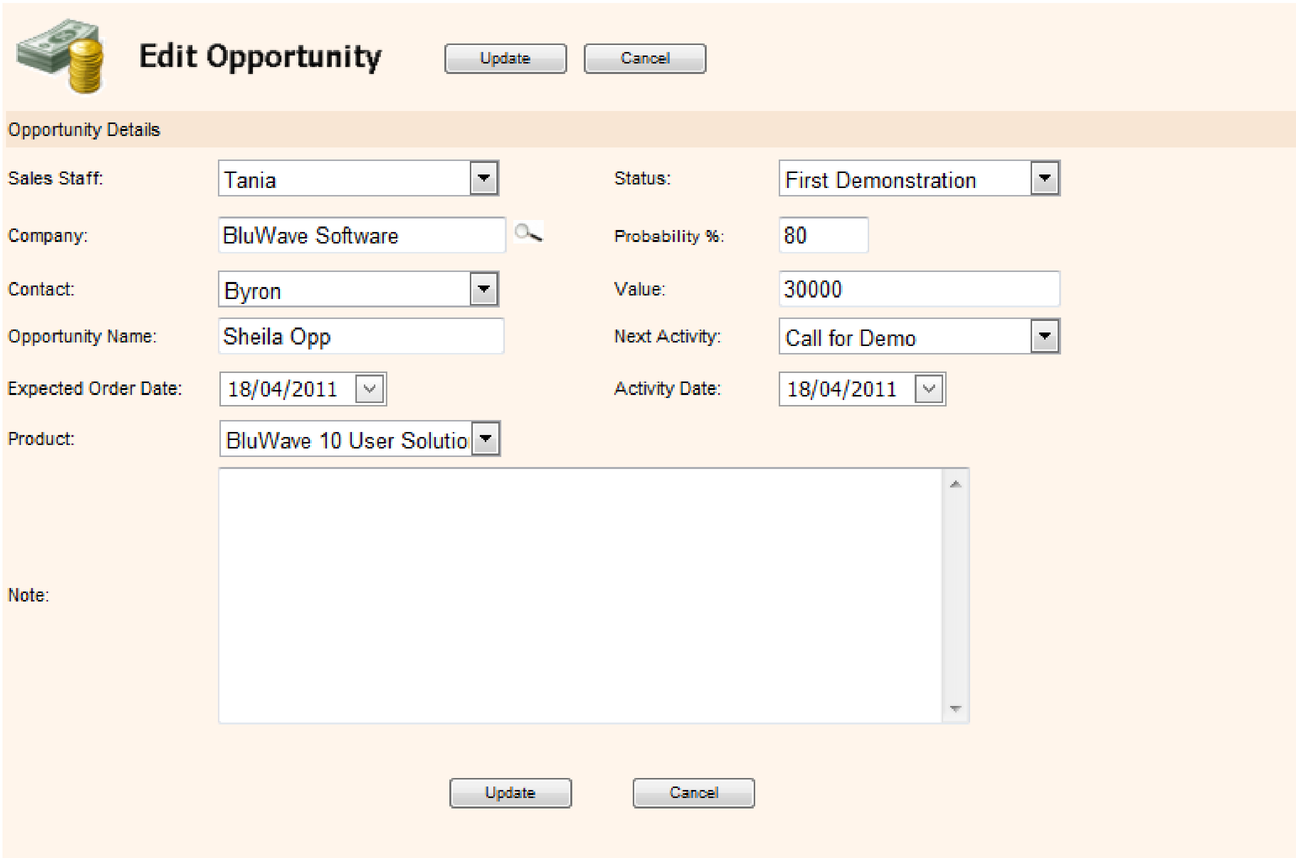
Begin by clicking on the Opportunity Tab. Start typing the company name in the Search box; you need to enter at least 2 characters. You can also select a letter in the alphabet to view a list of companies beginning with that letter. This will enable you to view your opportunities by Company.

Click on Add New Opportunity to create a new Sales Opportunity.

Click on View Opportunities to get a list of Opportunities.

Select Edit on the relevant opportunity to view those details.

Edit Opportunity



- In this screen you can select the expected order date, enter the potential sale value and probability of this opportunity.
- The status field is used to monitor your progress. This is very useful for status reports.
- Advantage will also enable you to attach files related to the opportunity.
- Click on the Update button to save the changes.

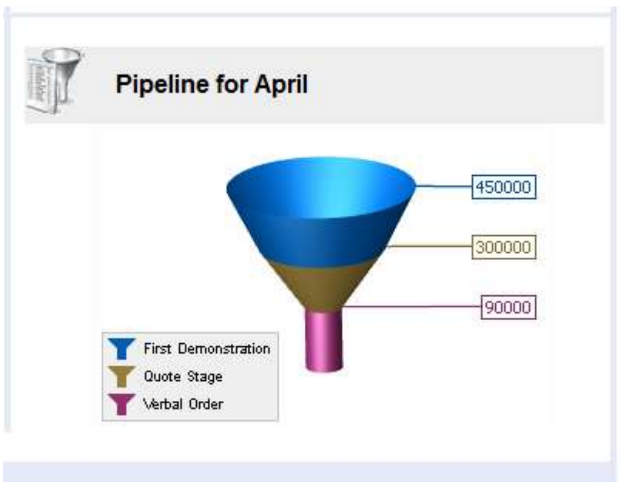
Opportunity Tracking (Managing the Sales Pipeline)

Use the Opportunity Tracking functions to manage new business acquisition.

• Define your own sales process for tracking the progress of your sales pipeline.

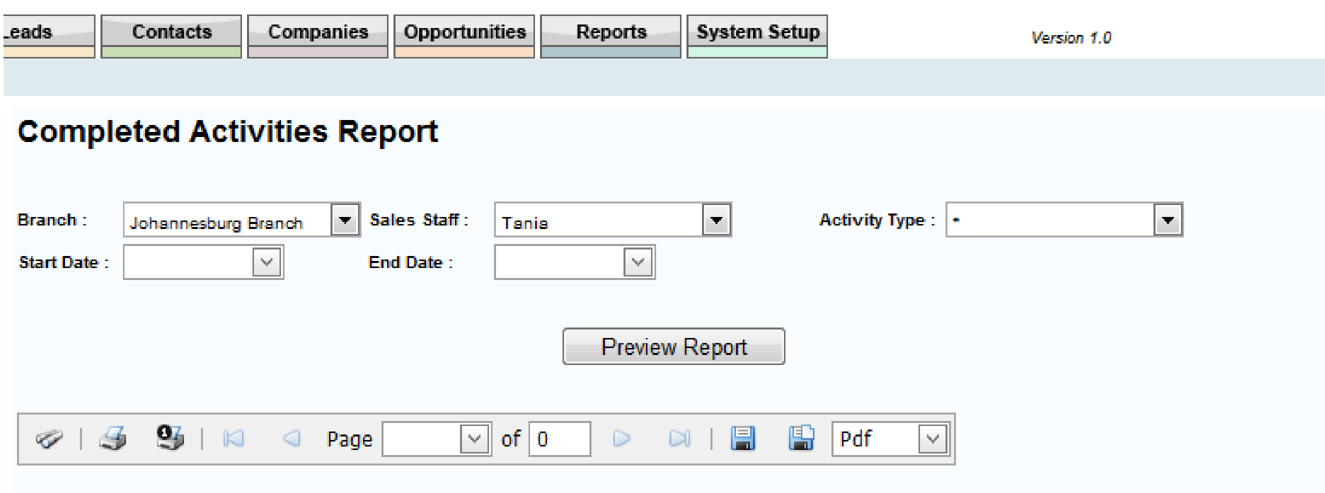
• The system generates a new business forecast based on expected order dates and sales probability percentages.

• Each sales person can view his pipeline visually on his homepage. Additional graphing on the sales person's dashboard details progress against target.



6. Reports

There are various reports to choose from.
Click on the report you wish view.



Select the relevant Branch, Sales Staff, Activity if required and date range. Click on Preview Report button.

Completed Activities Report

Branch : Johannesburg Branch

Salesperson : Tania

Activity Description : Arrange Cust Visit

07/04/2011	SuperWave	Mr Ross Botha

called and scheduled for next week

Total For Activity Type : Arrange Cust Visit 1

Activity Description : BluWave Demo

06/04/2011	BluWave Software	Mr Denzil Govender

Presented BluWave solution for sales and senior management as well as national sales team. Interest in I Pad - took that to demo as well. Market capital items - tenders - need to follow-up on tender awards.

Total For Activity Type : BluWave Demo 1

Activity Description : Customer Survey

05/04/2011	BluWave Software	Mr Denzil Govender

Called re project progress - opp tracking going well - foll up on quotes side. Installed but no training done yet on it.

Total For Activity Type : Customer Survey 1

Activity Description : Present Proposal

01/04/2011	Diamond Products	Mr Dales Son

Meet with Dale and Fin Dir go thru proposal reviewed - to start in May after Easter

Total For Activity Type : Present Proposal 1

Total For Salesperson : Tania 4

Total For Branch : Johannesburg Branch 4