EazeSales – Sales Management

User Guide

Updated – 25th August 2010

Legal Notices

Disclaimer

Preface

This document is meant to be used as a User Guide by users of Sales Management application.

Application Administrators will find useful information on how to configure Sales application and Users will find this guide handy to answer most of their queries.

Document Design

Each chapter is designed as a unit and contains all the information on that aspect of the application. Within the chapter are sections and sub-sections. Use the hyperlinks to go to any related topic to understand the other related aspects of the application design and use.

Conventions

Text Type	Description
Quick help on this	Maroon underlined text is used to highlight a hyperlink in the application which will take the User to another page or grid
www.eazework.com	Hyperlinked blue text will take the user to either some other section within the document or to the application page if the reader is online and has logged in
Add User Deactivate	Action buttons. These are buttons in the application which are used to perform actions.

Getting More Help

For support and assistance please email to support@eazework.com.

Feedback

We would like to hear from you. Please send us your comments and feedback on the application or any aspect to feedback@eazework.com. Please be as descriptive as possible while giving this feedback.

Table of Contents

Introduction to Sales Management

Welcome to EazeWork's Sales Management application. Understand the basic features and functionalities supported and how to start using it.

Welcome to EazeWork's Sales Management application. This application is designed to take care of the typical processes in a Sales function of a company. The application is built around four key processes – Contacts, Leads, Invoice and Collections. Products, Price Lists and Locations are aspects of underlying master data which need to be managed for full use of this application. You can read about each of these processes and features in this guide.

With the Sales Management application companies will now have access to all their Prospect, Lead and Customer data in one place. Products and Services being provided by the company can be modeled in the application and Sales regions can be defined. Multiple hierarchies are available for users to manage their data in a better manner.

Processes in Sales Management Application

In release 1.0

Contacts Management	- Y
Leads Management	- Y
Invoicing	- Y
Daily Sales Register	- Y
Credit Control	- Y
Payment Collections	- Y
Standard Reports	- Y
Email and Dashboard Alerts	- Y

Customizations available

Lead Attributes	- Y

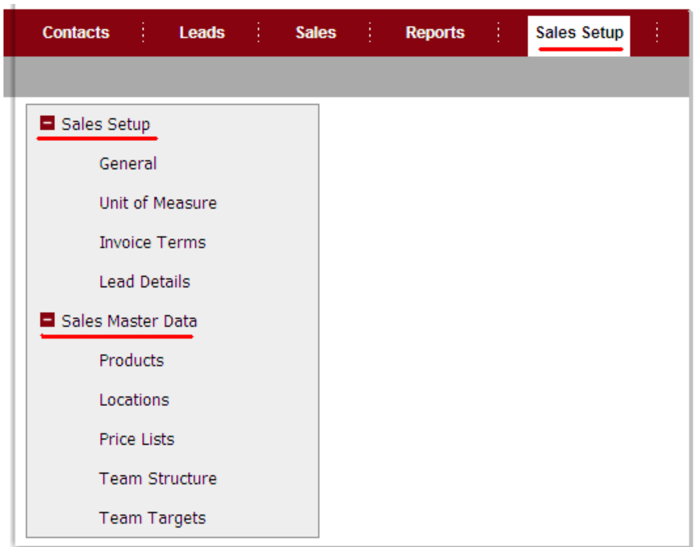
Planned for Future Release

Sales Order Capture
Sales Forecasting
Inventory Tracking
Customized Reports

See Also
Types of License
Setting up and Using Sales Application

Application Features

Setup and Configurability



All EazeWork applications can be configured to meet some specific business requirements. These configurations are specific to your setup and can be changed at any time. Most of the configuration is handled through Setup. Setup is an important activity which needs to be done upfront and also updated if there are changes in the requirements. See Sales Setup for more details on this important section.
Another important activity which can be done in Setup is Master Data creation. See Sales Master Data for more details.

Preferences

As a User you can setup your personal preferences and also manage your password through this section. See Preferences for more details.
Application Administrators can add / delete Users and control role based access from Manage Subscriptions section.

Mouse-over Commands

Mouse-over commands allow Users to perform some actions without going to the details page. This functionality should be used when Users do not want to view details but are sure of their actions and can complete them on the summary table itself.

Table Filters

Deve					
Department Name	**Employee Name**	**Employee Code**	**Designation**	**Location**	**Phone**
Development	Vivin	TPC9		TPC,Delhi	
Development	John	TPC2	Director-Application Dev	TPC,Delhi	
Development	Paul	TPC7		TPC,Delhi	
Development	Tony	TPC8		TPC,Delhi	

This feature allows to quickly narrow down the data from a bigger data set. You can enter a text string in the box on the top of the column and the table data will get filtered down to show only the rows which have the matching text (in the same column).

On Screen Help

Each page is provided with a context specific help which provides Users with basic information about the page. This can be accessed by clicking on Quick help on this page link. Additional information can be accessed through Related Topics.

New Button, Quick Links and Calendar

Possible Actions

- A New Request can be created from the button on the right pane
- Quick links can take Users to tasks which are frequently done
- Users can view Calendars which will show Holidays and Leaves applicable to them

Roles in Sales Application

Sales application mirrors the roles which are there in a typical company with a focus on direct sales. For any user an understanding of the various roles and their function is necessary before the application can be fully used. There are two types of roles – Unique Roles and Non-unique Roles. Unique Role can be given to only one User at a point of time while Non-unique Role can be given to multiple Users at any point of time.

User

This is the role given by default to all the subscribers of Sales including the Application Administrator. Unless you are a User you cannot log into the system. All other roles are in addition to User role. In a way the User role is same as a typical Employee in the company, first you have to be an Employee before you can be anything else. This is a Non-Unique Role.

Application Administrator

Application Administrator is the most important role. He is responsible for various tasks like – managing the Application setup, adding / deleting Users, managing roles and access of Users and interacting with the EazeWork Customer Manager for maintenance and other tasks. It is a Unique Role i.e. only one User can be Application Administrator at any point of time. This is a common role across applications, i.e. if you subscribe to Payroll and Sales also the Application Administrator role is handled by one person.

CEO

This role is given to the head of the company. As the CEO he is on the top of the organization hierarchy and responsible for some key processes. He also is able to view most of the data in the system through reports. This is a Unique Role.

Account Head

This role is used in Sales to ensure that the credit limits for customers are maintained properly. Any change in credit limit is done by the Account Head. This is a Unique Role.

Accountant

Accountant role is given to the persons who are responsible for collection of money from the customer either directly or through the Sales team. This is a Non-unique Role, i.e. there can be multiple Users mapped to Accountant role.

Sales Support

Sales Support role is given to a operations person who is working in the back end and helping the Sales team. Typically this role is used for Lead generation, Invoice creation and Customer support. In Sales application the Sales Support person can create Contacts, Leads and assign them to any Sales Executive. He can also fill up the Sales Register or create Invoices on behalf of the Sales team. This is a Non-unique Role, i.e. there can be multiple Users mapped to Sales Support role.

Types of Licenses

There are two types of licenses for Sales application trial and paid. A trial license is useful for startups and small companies and also for larger companies who want to try out the application before deciding to buy. For Sales two different editions are available for paid users, these are Lite and Standard editions – Enterprise edition will be launched soon.

Features which are available in the various editions and differences are detailed below.

	Trial	Lite	Standard
General			
Number of Users	5	No limits	No limits
Space per User	5 MB	15 MB	25 MB
Bandwidth per User (download and upload per month)	10 MB	20 MB	30 MB
Common Features			
Configurability	Y	Y	Y
Customizable Workflow	N	N	Y
Multiple Users with System Roles	N	N	Y
Email alerts	N	N	Y
Dashboard alerts	Y	Y	Y
Standard Reports	Y	Y	Y
Custom Reports	N	N	Y
Export, Print Reports	Y	Y	Y
Sales Processes			
Multiple Units of Measure	N	Y	Y
Multiple Prices	N	Y	Y
Discounts	Y	Y	Y
Multiple Locations	3 Locations max	No limits	No limits
Product Groups and Products	10 Products max	No limits	No limits
Product Document Mgmt	N	N	Y
Sales Hierarchy	Y	Y	Y
Define and Track Sales Targets	Y	Y	Y
B2B and B2C Contact Management	20 Contacts max	No limits	No limits
Customize Contact fields	N	N	Y
Customize Lead Properties	N	Y	Y
Lead Teams and Task Assignment	Y	Y	Y
Lead Document Management	N	N	Y
Cross Location assignment of Leads	Y	Y	Y
Daily Sales Register	Y	Y	Y
Credit Control	N	N	Y
Invoicing	N	N	Y
Collection Management	Y	Y	Y

Besides these differences there also are differences in services and other aspects. For more details you can refer to http://wwww.eazework.com/apps/sales.aspx.

See Also
Application Features
Setting up and Using Sales Application

For Application Administrators – Application Setup and Account Management

Welcome to EazeWork's Sales management application. As an Application Administrator you have a critical role to play, understand how to start using this application.

Setting up and Using Sales Application

This section explains how to manage the initial Setup and adding Users.

Three activities have to be completed before Sales application can be used by the Users. These activities can be completed by Application Administrator or can be done by EazeWork Customer Manager also. Please email us at support@eazework.com to find out who is the Customer Manager for your company (only available to paid users).

Application Setup → Master Data Creation → Adding Users and Assigning Roles

1. Sales Setup

During this activity the Application Administrator of the company configures the Application with the help of EazeWork Customer Manger. This configuration ensures that the application is mirroring the business process of the company to the extent possible.

Application Setup can be changed at any point of time in future but if the change has an impact on the data or transactions then the associated changes have to be managed.

2. Sales Master Data Creation

Products, Locations, Sales Hierarchy, Price Lists are some examples of Master Data which needs to be created by the Application Administrator before the end users can start using the application.

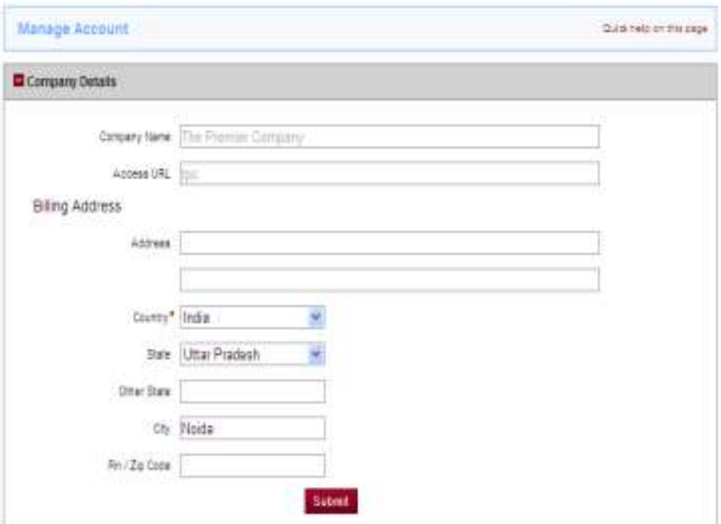
3. Adding Users and Role Assignment

In the final step the Application Administrator adds Users and gives appropriate roles to these Users. The Users need to validate their accounts after which they can start using the application.

Account Management

Manage Account section is accessible only to Application Administrator. Using this section the Application Administrator can add or delete users and maintain the company profile.

Account Summary

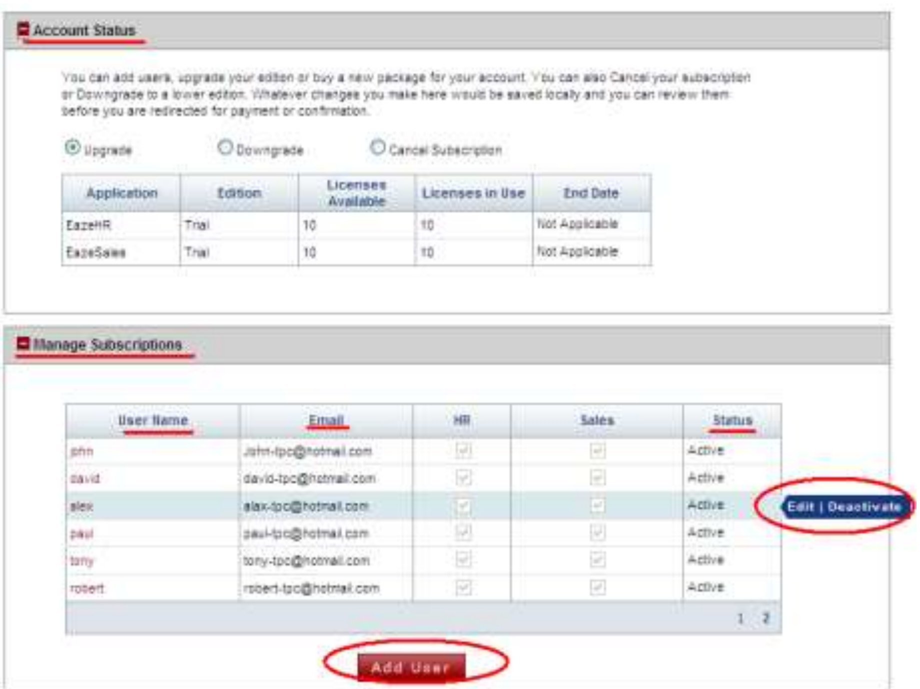


Possible Actions

- You can update the billing address for your Company and view the access URL from this page.

Manage Subscriptions/ Add Users

In this Section Administrator can manage the subscription and roles of all the Users of the Company. By default all the roles of Sales application are inherited by the Administrator when he activates the subscription the first time. After that he needs to complete two critical tasks of Adding Users and Defining Roles



Possible Actions

- You can review the Subscription details like Applications and License subscribed to, Number of Users, End date of Subscription
- You can Add Users by clicking on the Add User button
- You can Deactivate an existing User by using the mouse-over action Deactivate
- You can Edit an existing User and manage roles which have been assigned to him Edit

Adding Users

1. Enter the email id of the User
2. Define the roles which the User is supposed to perform. By default all Users will have the User role, this cannot be removed. Any additional role can be given to them based on their profile. Refer to Section Roles in Sales for more details on the different types of role.
3. Click on Save. The User gets added to the Company but his status is Not Validated. Only when he completes the Account Validation process will his status change to Validated.

Deactivating Users

As an Administrator if you Deactivate any User, the deactivated Users will not be able to access their EazeWork account. Use this feature if you want to prevent some User from accessing the application. This is a reversible process and when you Activate the User again he can start using the application.
Deactivating a User does not remove any role or links in the application, in fact except the Administrator and the User no one else gets to know that an User has been Deactivated. So all work flows where this User is linked can be initiated but will stop where action from him is required.

Role Assignment

Possible Actions

- Select the Common Roles you want to give to the User. If you select any one common role automatically the user will get access to all the applications the company has subscribed to. If there are not enough licenses available in any application then this action will not be allowed.
- Select the Application Roles you want to give to the User. Like Common roles these roles are also to be given across all the Applications where the role is available.

- You can remove an existing role from a User by deselecting the checkbox – removing the access to the application will also remove all the Application Roles which have been given to the user.

A Unique Role cannot be removed from the User to which it is assigned. Instead of this the role has to be assigned to the New User and automatically it will get removed from the previous User to which it was assigned. Refer to the section on Roles in Sales Application for more information.

See Also
Preferences
Sales Setup
Sales Master Data Creation
Adding Users
Role Assignment
Account Validation

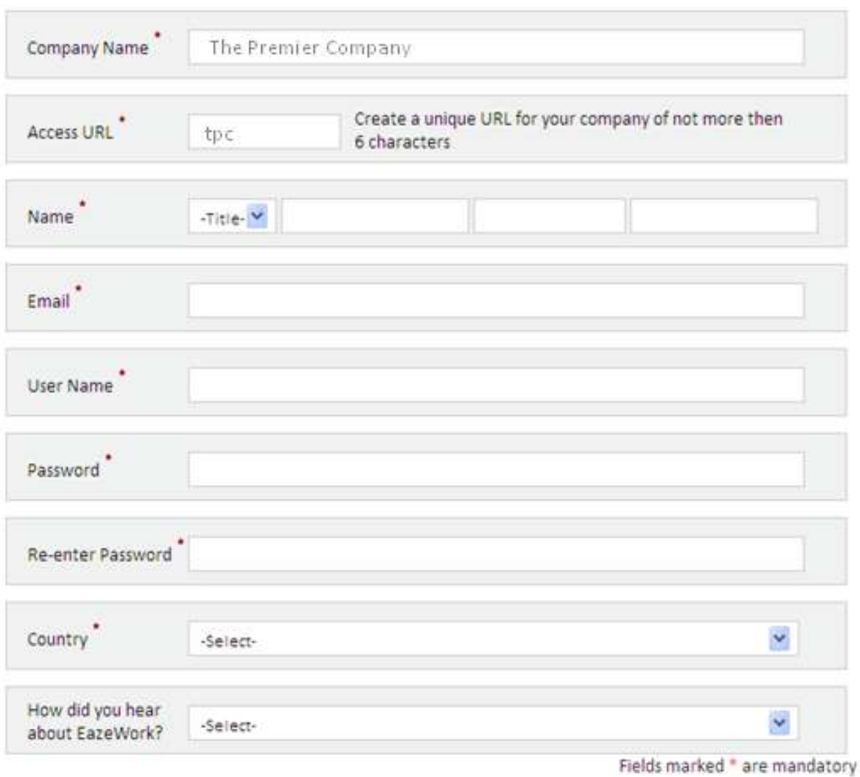
For Users – Account Validation, Application Access and Preferences

Users of the applications should read this section to understand how to validate their account, access the application and setup their preferences.

Account Validation

Access to all EazeWork applications are controlled through the unique user name which each User is asked to create. This user name is associated with a primary email which is validated during the registration process. The sequence of activities to be followed is –

1. You will receive an email in your mail box from either your Application Administrator or EazeWork Customer Manager.
2. When you click on the validation link you will be taken to the Registration page



Actions to be completed

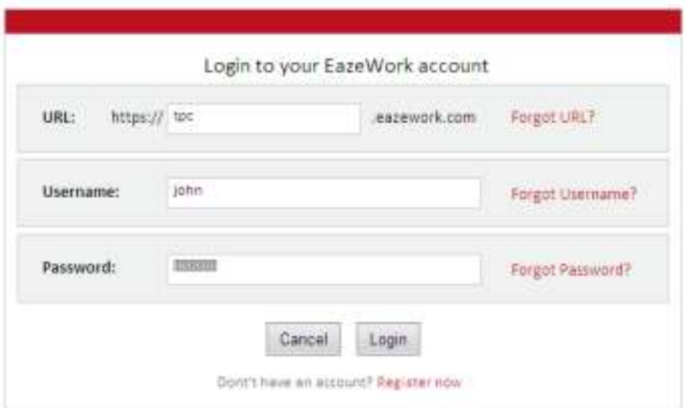
- Create a unique User name for yourself
- Enter and reconfirm the password. Please remember this password and keep it in a safe place.
- Accept the Terms of Use and Privacy and Security Policy. You can read the documents available on the website.

3. When you have filled up the Registration details you will be redirected to your dashboard from where you can start using the application.

EazeWork

Logging In

Logging on to Sales application has to be done through https://www.eazework.com/login page. When you go to this page you will see a login window.



You can enter your User Name and Password and login.

Auto time-out

You will get timed out if there is no activity for a period of 15 minutes. This is done to ensure safety of your information.

Force Login

You cannot login to the application from two different browsers or two different locations – only one active session can be maintained at any point of time. If you have an active session from one location or you have been not logged out from the session for any reason and you try to login again you will get an error message "You are already logged into the application or your previous session would not have closed properly. If you click on Force Login you will be logged out from the other session. Any unsaved work there will be lost." In such a scenario you will get a Force Login button using which you can log out from the other session and login.

Password Retrieval

If you have forgotten your password you can request a password reset. This link is available to you on the login page. You will be sent a hyperlink to your registered email using which you can reset your password.

Registration for first time Users

The sections explained above work for a User who has already been added by the Application Administrator to be a part of the application setup. If you are a new User and do not have an EazeWork registration you can go to www.eazework.com/registration and register.

Accessing the Application

Application can be accessed through multiple methods. This section explains the various application access mechanisms available to a user.

Using the Website

The default method for logging is through the website. This is explained in the previous section on Logging In.

From email alerts

Emails are sent to users as notifications when certain actions take place in the application. For example, when an employee raises a leave request his manager gets an email with links to certain actions. On clicking on these action buttons / links the manager will be routed to the application page for completion of the action. If you are using latest browsers and have saved your login / password details you will be automatically routed to the page where the action has to be completed.

From Mobile phones

Mobile phones can be used in to access the application as a browsing device – if you have a mobile through which you can browse the internet you can use it to also browse the application.

Preferences

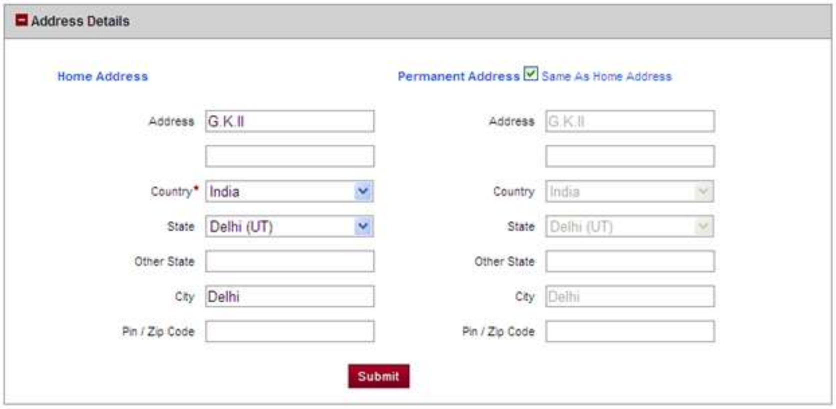
Preferences Module allows Users to manage their profile and password. Users can also see the roles they have access to in the Sales application.

User Profile

Update and manage the User Profile from this section.

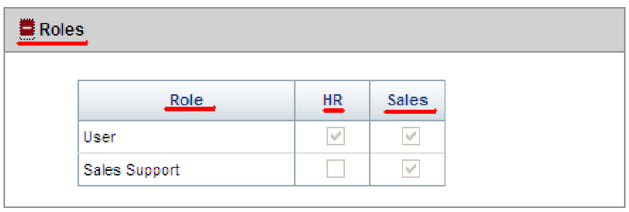
Possible Actions

- Update your Personal details, upload your photograph, update your contact details

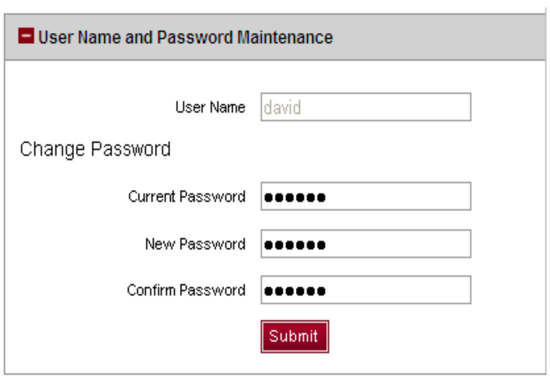


Here you can update your home and permanent addresses.

Applications / Roles



You can view the Roles you have within Sales application in this section. You cannot make any changes to this table and if you need any roles added or removed from your profile you should get in touch with the Application Administrator of your company.



Here you can view your User Name and update the Password. You cannot change your User Name.

See Also

Sales Setup

Sales Master Data Creation

Account Management

Products

> Defining and managing Product information is one of the most important tasks in this application. This section gives an overview of the Product definition and maintenance.

Products and Services are the items which are sold by a company. In this application Service has not been modeled separately but the option to model a typical service unit of measures have been designed which can be used to create Service offerings.

Products are linked to Price lists and also assigned to Locations, these associations help in defining the price and whether a product is available for sale in a location or not.

Attributes which make a Product are given below

- Product Code / Description: both are used to refer the product in various places.
- Product Group: each product belongs to a Product Group. Read here to understand about Product Hierarchy.
- Unit of Measure: the unit on which the Product is sold is known as Unit of Measure. It could be liters, kgs, mtrs, each, case. Standard units of measure are predefined and available as a drop down. You can create a custom unit of measure for your use in the Setup Section.
- Base Price: the default price which is automatically added to the Base Price List. Read here to understand about the Price Lists.
- Maximum Discount (%): Discount available to Sales Executives which they can give to the end customer without any additional approvals.

Product Group

Product Group is a logical grouping of products with similar attributes. Product Groups are used to control the access, prices, availability or even discounts at an aggregate level and doing so helps in reduction of effort to manage.

Unit of Measure

Products are stocked and sold in a pre-defined set, this is called as Unit of Measure. This might be different from the production or purchasing unit of measure. For example if an importer is purchasing large quantities his purchasing might be in crates or in tones and the same product if after some value add is being sold in the wholesale or retail market the unit of measure will be in dozens or pieces.
Each Product can have only one unit of measure so if the company wants to have multiple units of measure for the same Product the recommendation is to create a different Product with the second unit of measure.

Base Price

Base price is the default price which is used when no other price is associated with the Product. This can be thought of the basic price which is agreed upon with the finance / senior management and variations due to regional costs or competitive activity is managed through the Price Lists.

Maximum Discount

Each Product can have a maximum discount percentage which can be allowed to the Sales Executive to be given to the customer. This discount percentage is common across all Locations and Sales Executives. This discount can be changed at any point of time but the change will be only applicable to the leads or invoices which are created after the change.

Sales Period

Products have a period in which they can be sold by the Sales team. This period is called as the Sales period and defined by the Sales Start and Sales End dates. No invoice can be created before the Sales Start date or after the Sales End date.

Product Status

A product has three statuses – Draft, Active and Inactive. Each status is explained below
Draft: Product is not visible to any other part of the application and Application Administrator can make any changes or delete it without any issue.
Active: Product is available to be added to Price Lists and Locations and is visible in drop downs in Leads, Sales Register or Invoices. This is the status when the Product is in the Sales period.
Inactive: Product is not visible anywhere in the application and it is no longer available to users. This is the status when the Product is outside the Sales period.

Note: A product once created cannot be deleted.

See Also
Adding Products
Product Hierarchy
Mapping across Objects
Price Lists

Price Lists

Information of Product pricing is captured in Price Lists. Price Lists are used to implement the desired pricing strategies across regions and product groups and can also be used to provide time bound schemes.

Sales Management application has a pre-built Price List which is known as Base Price List. All Products have a base price which is stored in the Base Price List. Using this Base Price List you can create multiple Price Lists, typically Price Lists would be used in the following scenarios

- Company wants to follow a uniform pricing policy across the country but there are different taxes or freight costs which when added to the price lead to different sales price. Prices can be back calculated to account for this difference, places with higher tax or freight would have lower prices. These prices can be stored in region specific price lists
- Company wants to sell the same product at different prices to different channels as the channel discount structures vary. In this case also the price would be calculated taking into account the final price at which the products have to be sold. Note – the discount in this example is different from the Maximum Discount available to the Sales Executive as a part of Sales process.
- Raw material prices for one set of products have gone up and company wants to pass on part of the increase only to some regions. A new Price List with the increased price can be created which can then be applied to the locations falling in the region.

Future Effective Date

Prices can only be changed in future. Application Administrator has the flexibility of creating a new variant of an existing price list which can capture the information of the future date and price which will be applicable in the future.

Deleting Price Lists

To delete a Price List you will have to do the following

1. Remove the Price List from all the Locations where it is currently being referred to.
2. When this is done the Products which are linked to this Price List in the locations will also be removed automatically.
3. This has a cascading effect and the Product information which is listed in in-process Leads or draft Invoices will be removed.
4. If the Product is to be added back to the Lead / Invoice then first the Product information is updated with a new Price List at the Location and then added to the Lead / Invoice

See Also
Adding Price Lists

Locations

Location is a geographical territory which can be equated to the concept of either a retail point or a sales territory.

Sales Locations (called Locations in short) are very important for a Sales Organization. Locations are used to

- Define and manage the geographical territory over which a Sales Executive has direct control
- Map Prospects, Customers and Channel Partners
- Define prices and sale-ability of Products across regions

A location is defined and maintained in Setup by the Application Administrator and is mapped to

- Sales Executive
- Products and Price Lists

A location can be made inactive and removed from all future transactions but we cannot delete a location once created.

See Also
Adding Locations

Understanding Hierarchies

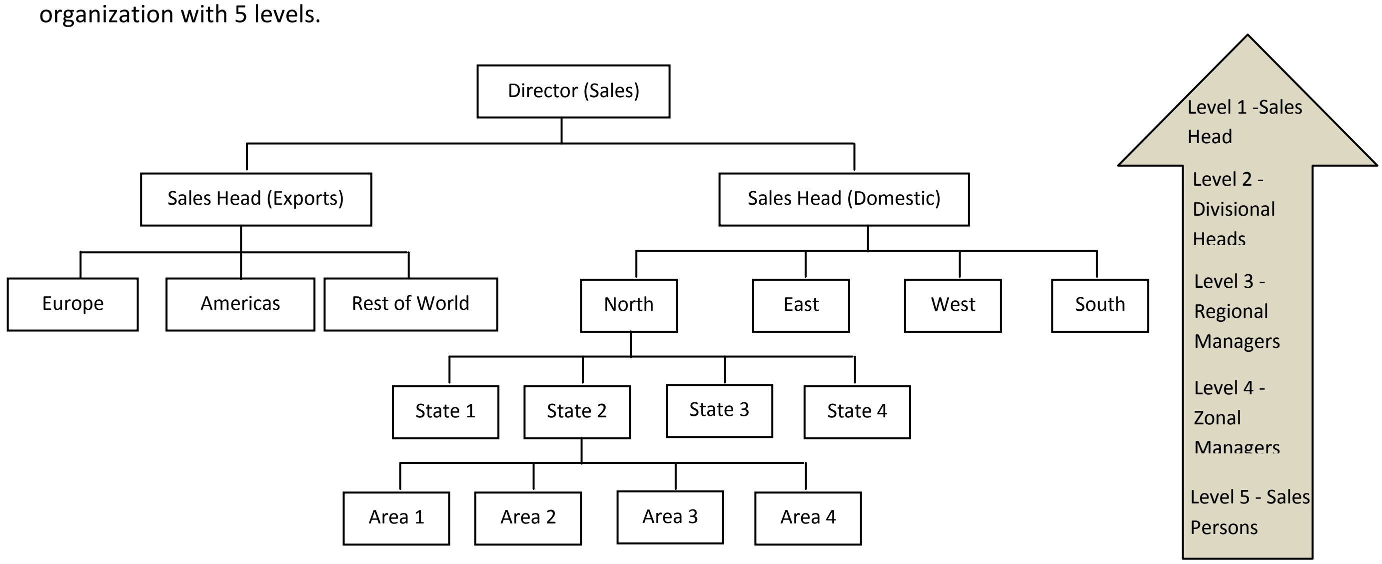
Hierarchies are used in various places to aggregate and group objects. Read this section to gain an understanding of hierarchies used in Sales Management application.

Sales Hierarchy

Reporting relationship across the Sales team are key to defining the Sales hierarchy. In any organization as we move from the frontline up the seniority chain the Sales focus and responsibilities change. In Sales management application we use the Sales hierarchy for two reasons

- It helps to define the reporting relationships and in Setup the access control can be managed by reporting teams
- Reporting of closures, pipelines and losses can be done at any level and performance across various verticals can be compared.

An example of a typical company engaged in Exports and Imports is shown below. This is an example of a Sales organization with 5 levels.



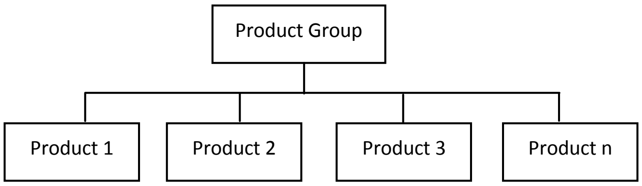
This hierarchy can be modeled using the Sales Executive – Manager relationship in the Sales Team Structure section. This can be done only by the Application Administrator. Sales Executive is a generic term used to refer any Sales user in this hierarchy.

The important things to note are

a) Each Sales Executive is mapped to one and only one manager, except the senior most person who also has the CEO role
b) As you go up the hierarchy the data of the team below you is visible to you in the application and you can also perform some actions like lead assignment
c) There is no limit and you can have any number of levels in this hierarchy

Product Hierarchy

In the application Products are mapped using a two level hierarchy. When you define a Product Group in setup you will have to create and assign Products under this Product Group.

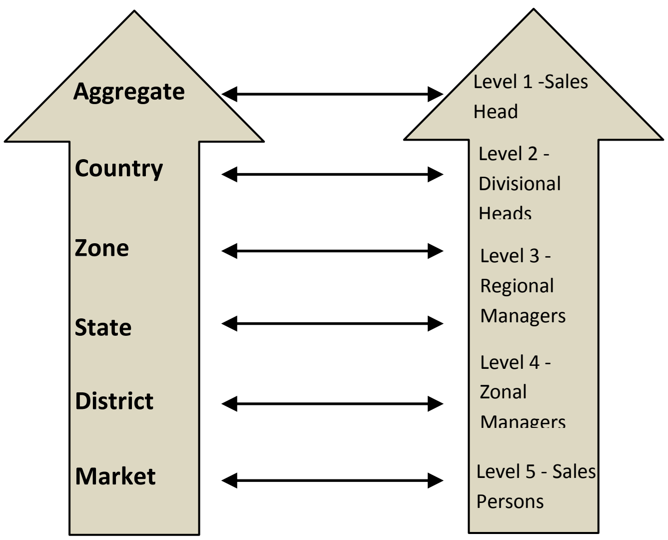


The important things to note are

a) There is no linkage across different Product Groups
b) Products within one Product Group should have some uniform attribute which makes it a logical grouping

Location Hierarchy

At this stage in the application there is no location hierarchy and you can model only level of locations. We plan to introduce a hierarchy of locations at a later date. The concept of location hierarchy is similar to Sales hierarchy and each level of hierarchy will be equivalent to a sales territory and should map to a level in Sales hierarchy.



See Also
[Products]
[Price Lists]
[Locations]

Mapping across Objects

Understanding the relationships between various aspects of Sales management application can be gained easily by understanding the basic objects and inter-relationships between them.

Objects in Sales Management Application

The main objects which are used in Sales Management application are

Contacts

A detailed description of Contacts is given in the Contacts section; in brief these are all the Prospects and Customers which are managed through the application.

Leads

A detailed description of Leads is given in the Leads section; in brief Leads are the opportunities for selling products or services to the Prospects or Customers.

Invoice

Invoice captures the details of a Sale which has been made and the products / services are ready for delivery.

Sales Executive

Sales executive is the user of this application; he can be at any level of the Sales hierarchy.

Location

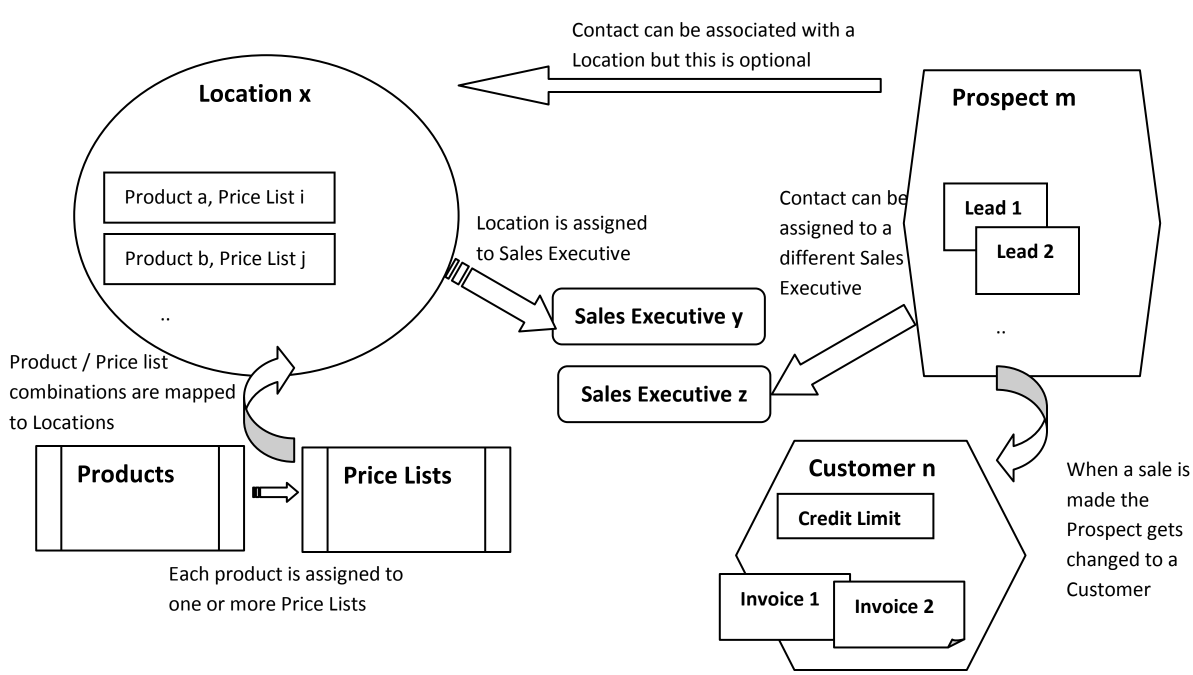
Location is a geographical territory which can be equated to the concept of either a retail point or a sales territory.

Products

Products are used to define both the Products and Services which are being sold by the company.

Price Lists

A price list has a set of products and a price.



The graphic above highlights the various mappings between the data objects. The important ones are

- Sales Executives are mapped to Locations. Each Sales Executive is mapped to one or more locations and each location should have one and only one Sales Executive.
- Each Prospect or Customer can be mapped to a Location but this is not compulsory.
- Each Location has clearly identified Products and Price Lists which tells which Products can be sold at which Locations at what Price.
- A Product can have multiple Prices but these have to be captured in different Price Lists. One Price List can have only Price for a Product.
- A Prospect or Customer can have multiple Leads and multiple Invoices. If the Prospect or Customer
- Each Lead can be assigned to only one Location - this will be the same location as the location assigned to Contact (if that has been done)

See Also
Products
Price Lists
Locations
Contacts
Leads
Sales Register
Sales Invoices

Setup

This section explains the process of Setup which is managed by Application Administrator. Setup gives the flexibility to map application processes in line with the Company requirements.

Setup section allows the Administrator to access the Setup of all applications which they have subscribed to. If you have subscribed to only one application Sales then only Sales will be visible from the Sub-menu. Setup for Sales is divided into two parts

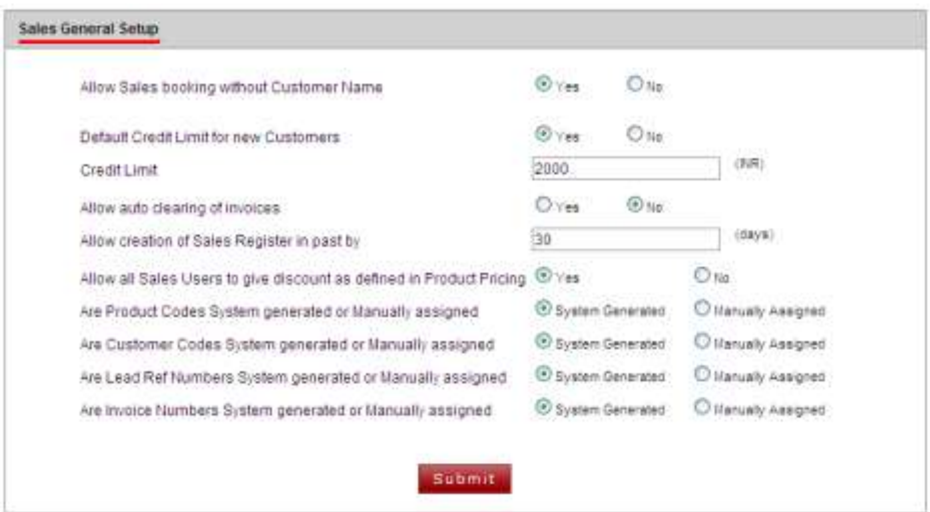
1. Sales Application Setup: Here all the necessary Application Setup tasks are completed.
2. Sales Master Data: Here all the required Master Data is created and maintained.

Sales Setup

Menu Path: Sales > Sales Setup
Accessible to: Application Administrator

Sales Setup is divided into multiple sections. Each section is a group of activities which have mapping to a module or behavior of the application.

General Setup



Allow Sales booking without customer name in Sales Register
- Yes: sales can be booked without a customer name in Sales Register
- No: sales can be booked only against a customer in Sales Register

Default Credit Limit for new customers
- Yes: a default credit limit can be set here which gets automatically updated for all new customers
- No: a default credit limit of zero gets automatically updated

Auto clearing of invoices: Once an invoice is stuck due to insufficient credit limit it can be released either by increasing the credit limit by the Account Head or by realization of sufficient payment over time. Auto clearing of invoice would help in clearing invoices which are stuck automatically once the payment is realized and if this is not selected then the Account Head will have to go and clear the invoice from a “Credit Hold” status manually but only after sufficient payment has been realized.

Allow creation of Sales Register in past: Sales register is meant to capture daily cash based sales which are typically not associated with a customer. If this option is selected then the Sales Executives can create a Sales Register with a past date otherwise they don’t have this flexibility.

Allow all Sales Users to give discount as defined in Product Pricing: if this is selected as No then the Sales Executives cannot give any discount and will have to sell as per the price in the price list. If this is selected as Yes then the Sales Executives can give the maximum discount as specified in Product Master.

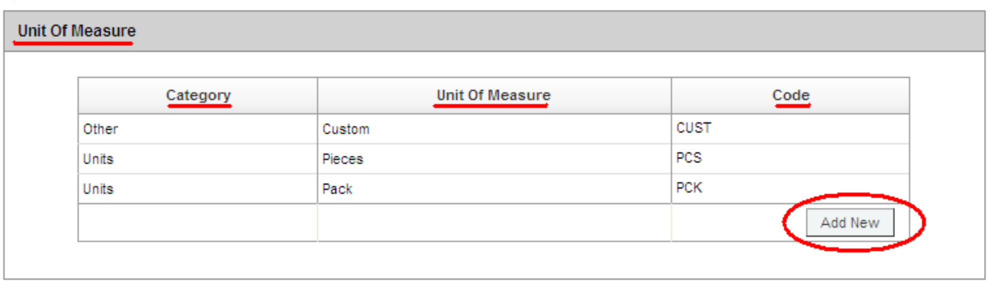
System Generated Vs Manually Assigned Codes

If System Generated codes / numbers are selected then all the numbers will be automatically generated whenever a new record is created. If Manual Assignment is selected then the number will have to be inputted manually, these codes/ numbers could be as per the numbering convention your Company wants to follow. We strongly recommend that you use “System Generated” setting but if you want to use special codes / numbers which follow your company’s standard you can select “Manually Assigned”

Note: The above features provide the Administrator with immense flexibility and should be setup after discussions with the person heading the Sales function.

Unit of Measure

Unit of measure is a Product attribute and is used to define the unit in which products are bought and sold. For more details please read the section on Unit of Measures.
You can select unit of measures from a set of system defines values. Only if a Unit of measure has not been used in a product it can be deleted.



Category	Unit Of Measure	Code
Other	Custom	CUST
Units	Pieces	PCS
Units	Pack	PCK

To create a custom Unit of measure you need to select Other in Category dropdown and enter the text you want to create in the Unit of Measure column.

See Also
Sales Master Data
Setting up Lead Details
Application Setup and Account Management

Setting up Lead Details

Setting up lead details involves defining various lead parameters which are to be used by the company. There are four different setups in this section

- Lead stages
- Lead actions
- Win criteria
- Lead source

The system comes with a set of default values in these categories which can be modified by the Application Administrator.

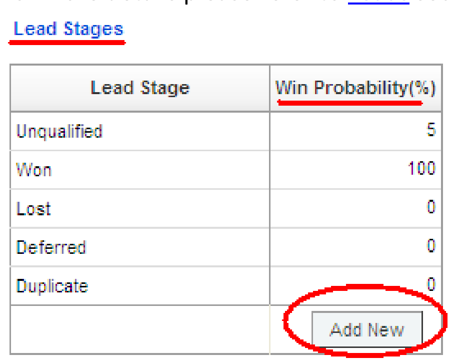
Lead Stages

There are four pre-defined Lead Stages which the Application Administrator cannot edit or delete, these are

- Unqualified : this is the first stage for all leads
- Won: this is the final stage used to close a lead as won
- Lost: final stage used to close a lead as lost
- Duplicate: used if the lead has been created twice and one needs to be closed
- Deferred: used if the customer has deferred the purchasing decision

Besides this the application comes with preconfigured lead stages which can be deleted or edited by the Application Administrator. Lead Stages are also linked to win probability which can be edited by the Application Administrator. But he cannot edit the win probability of last 4stages i.e. Won, Lost, Duplicate and Deferred probabilities can only be 100% or 0%, for Unqualified win probability % can be edited.

For more details please refer to [Leads] section.



Possible Actions

- Add and Edit Lead stages
- Delete saved drafts
- Manage the win probabilities

Lead Actions

There are a number of activities which need to be completed from the time a lead is identified to its successful closure. Tracking and successfully executing these activities is critical for a high lead conversion rate. Lead Actions are a set of actions available to the Lead Owner and Team Members which they can select for the lead and assign responsibility to the right person for completion. The list of Lead Actions is maintained and can be customized by Application Administrator in Setup.

Win Criteria

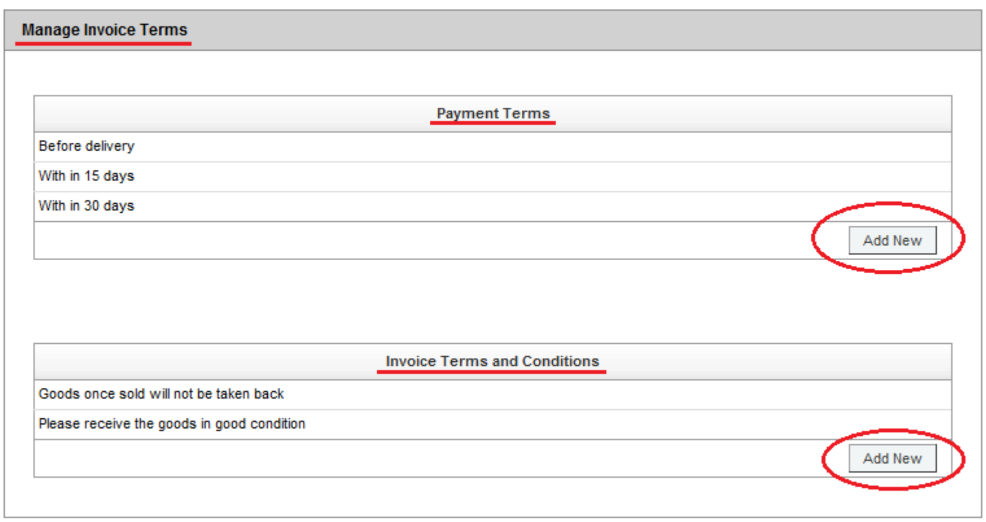
Each opportunity has a primary condition which when met would be instrumental in winning the deal. This is captured as a part of the lead as Win Criteria. The objective of including it as a part of the lead is that everyone associated with the lead and the Sales leadership should be aware of it.

Lead Source

Administrator can define the various sources through which the lead has originated. A set of pre-configured lead sources are available as default.

Invoice Terms

Administrators can define the Payment Terms and General Terms and Conditions that should be sent with every invoice in this section.



The Payment Terms defined here can be selected in the invoice but there is no linkage between these terms and the Payment due date which has to be entered manually while creating the Invoice.

Any changes in the Payment Terms and General Terms and Conditions would not impact submitted Invoices.

See Also
Sales Master Data
General Setup
Application Setup and Account Management

Sales Master Data

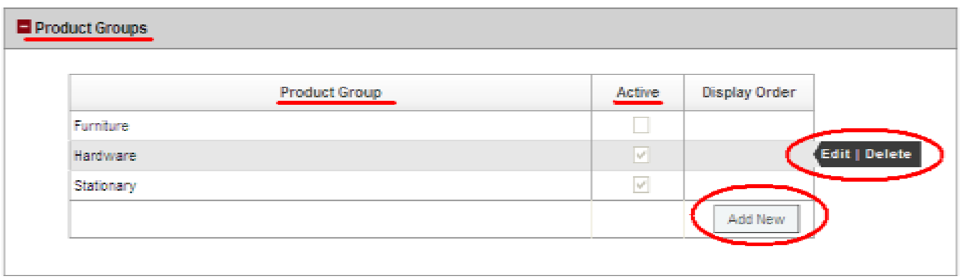
Products, prices, locations and sales team structure are all important data which needs to be maintained accurately for the Sales application to work properly. This section explains how to manage this master data.

Adding Products

Products and Services can be created and maintained for your company in this section. We have not kept a different section for Services but using an appropriate unit of measure and attributes you can model any service which your company is offering. To get a better understanding please read Products section.

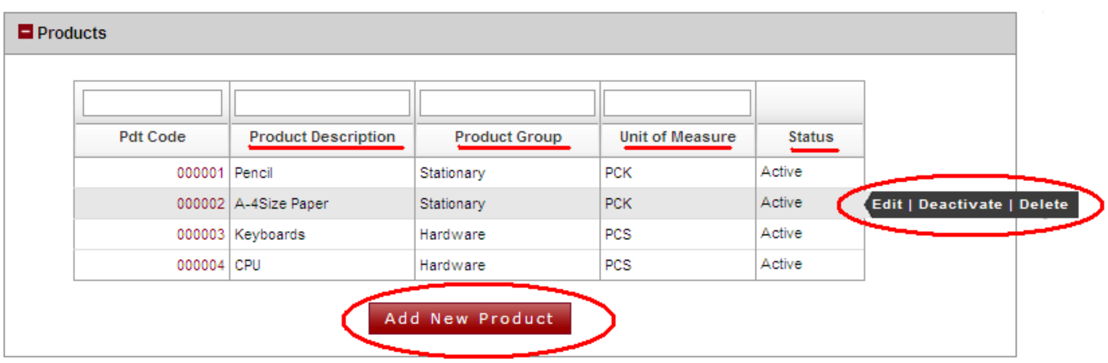
Product Groups

Products in Sales application are grouped under Product Groups. Any number of Product Groups can be created and maintained for a Company.



Possible Actions

- Add and Edit Product Groups using the Add New button or the mouse over Edit command
- Activate and Deactivate Groups
- Manage the display order
- Delete unused Product Groups (those in use cannot be deleted)

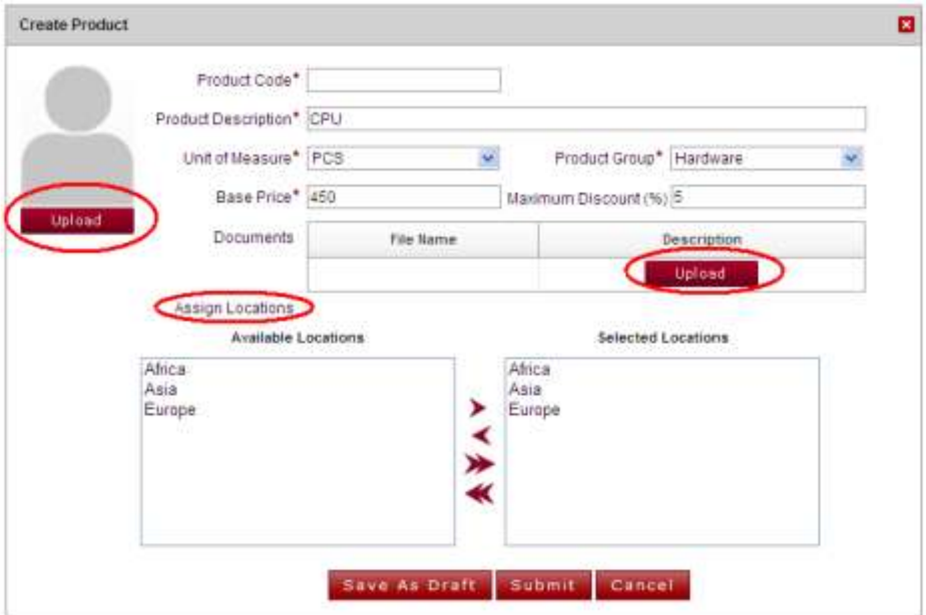


Possible Actions

- Add and Edit and Delete the Products through Add New Product button and Edit mouse-over command
- Activate and Deactivate products
- Delete unused Products (those in use cannot be deleted)

Add New Product

Creating a Product is a critical activity and needs to be done carefully with the help of the department responsible for maintaining the Product details. For Services companies this needs to be done with the help of the Services design department.



Products Table

Field	Input	Explanation
Upload Photo	Optional	Product picture
Product Code	Compulsory	Product code
Product Description	Compulsory	Detailed description of product
Unit of Measure	Compulsory	Defines the unit of sale for this product. In this application if a product has multiple Saleable units it should be modeled as different products.
Product Group	Optional	Group to which this product belongs
Base Price	Compulsory	Default price which gets stored in the Base Price List
Maximum Discount (%)	Optional	Maximum discount available to Sales Executives
Sales Start Date	Optional	If entered then this date controls the date from which the product can be sold
Sales End Date		If entered then this date controls the date till which the product can be sold
Documents	Optional	Application Administrator can upload product documentation which can be viewed by Sales Executives when they view product information.
Assign Locations	Compulsory	Locations where this product is available for sale

If you are not sure of your entries you can save the record by clicking on Save as Draft, with this record will get saved but not submitted and once you have completed the details you can click on Submit.On submission the Product will become **Active**.

Activate and Deactivate Products

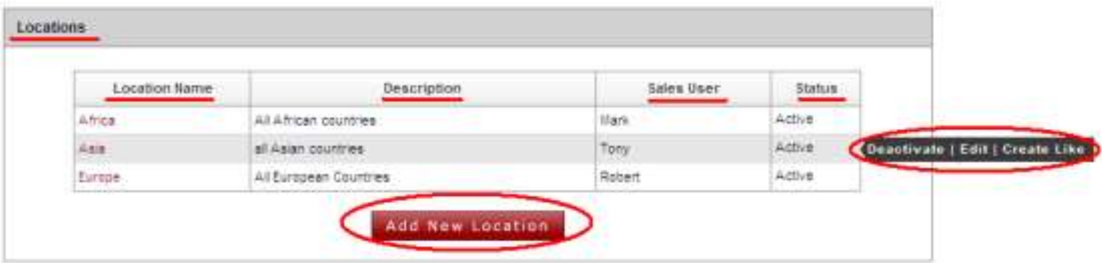
When a record is Deactivated it is not deleted from the database but is only removed from viewing. This allows the Administrator the flexibility of removing a record from User’s view but retaining it in the database. Only when the record is again Activated it would become visible in drop-downs or forms.

When a Product is deactivated it would be removed from the list and cannot be seen in any new Invoices or Leads. It will also be removed from existing Leads which are ***Active*** and Invoices which are not yet ***Submitted***.

See Also
[Sales Setup]()
[Adding Locations]()
[Adding Price Lists]()
[Maintaining Sales Team Structure]()
[Defining Sales Targets]()
[Application Setup and Account Management]()

Adding Locations

Location is a geographical territory which can be equated to the concept of either a retail point or a sales territory. To create a Location you need to specify only a text based description which captures the Location description. Each location is assigned to one and only one Sales Executive.

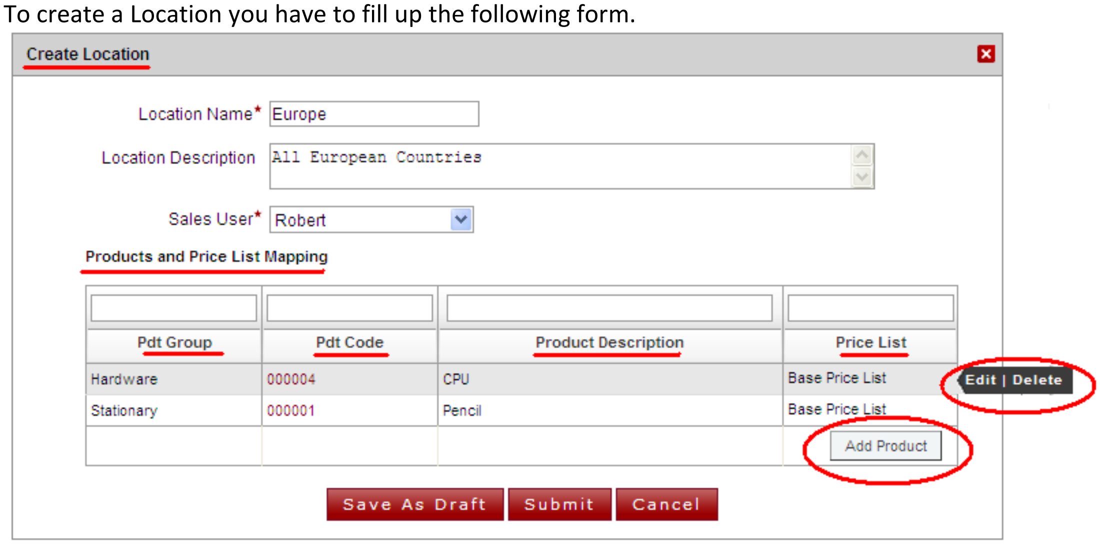


Possible Actions

- Add, Edit and Delete the Location through Add New Location button and Edit , Delete mouse-over commands. Only location in draft status can be deleted.
- You can duplicate all the products in a location in a new location by using the Create Like mouse-over command
- Activate and Deactivate Locations

Create Location

To create a Location you have to fill up the following form.



Location Table

Field	Input	Explanation
Location Name	Compulsory	Name of location
Location Description	Optional	Description of the location
Sales User	Compulsory	Assign this location to a Sales User (this should be a Sales Executive who is responsible for making sales in this location)
Product Group	Compulsory	Identifies the Product Group which is being added to the location
Product Code	Optional	Products which are to be sold in this location
Product Description	System	Description of the product
Price List	Compulsory	Select the price list which is applicable for this product in this location

Possible Actions

- Add , Edit and Delete the Products through Add Product button and Edit, Delete mouse-over command

If you are not sure of your entries you can save the request by clicking on Save as Draft, with this your request will get saved but not submitted and once you are sure of your entries you can click on Submit. On submission the Location will become **Active**.

If a Product Group is selected and Add Product is clicked then all the Products within this Product Group which have not been selected so far will be added and the Base Prices for all the Products will be also added. The user can go and change the Price List from the drop down and delete any product which he does not want to add.

Deactivating Locations

When a Location is deactivated it is not removed from the database, it also continues to be linked with all existing transactions. But it is not available for any new assignment, i.e. a new Sales Executive or a new Product cannot be assigned to it. Deactivation is like a temporary removal from the application and the action can be reversed by activating it again.

See Also
Sales Setup
Adding Products
Adding Price Lists
Maintaining Sales Team Structure
Defining Sales Targets
Application Setup and Account Management

Adding Price Lists

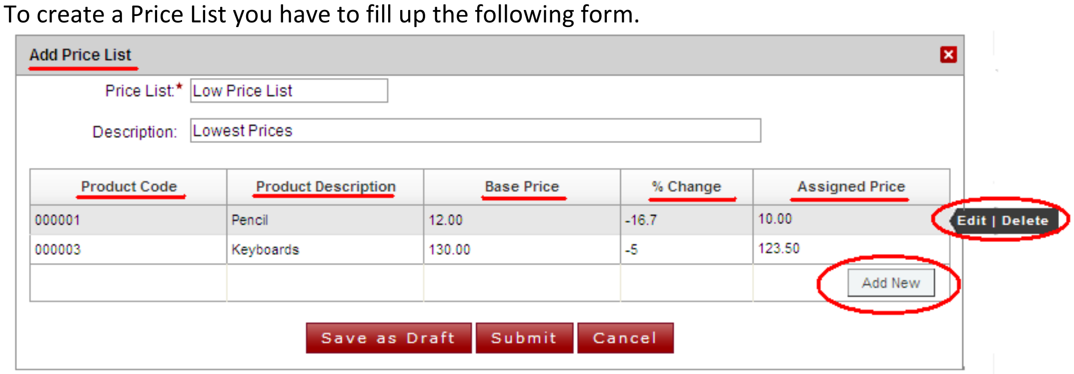
Price Lists are used to capture the pricing information for a product. Base price of a product is by default a part of the Base Price List but you can also create additional Price Lists and add products to it. The three way combination of Product, Price List and Location actually defines which product at what price is being sold at a particular location.

Possible Actions

- Edit and Delete the Price List through Edit Delete mouse-over commands
- Add New Price List through Add New Price List button

Add Price List

To create a Price List you have to fill up the following form.



Price List Table

Field	Input	Explanation
Price List	Compulsory	Name of price list
Description	Optional	Description of the price list
Effective Date	Compulsory	Date from which this price list will become effective
Product Code	Compulsory	Products which are part of this price list
Product Description	System	Description of the products
Base Price	System	Base price of the product as defined in the Base Price List
% Change	Optional	% change from the Base Price List price
Assigned Price	Optional	You can enter this directly or if you have entered the % change then this price is automatically filled up

Possible Actions

- Add , Edit and Delete the Products through Add Product button and Edit Delete mouse-over command

If you are not sure of your entries you can save the request by clicking on Save as Draft , with this your request will get saved but not submitted and once you are sure of your entries you can click on Submit . On submission the Price List will become **Active**.

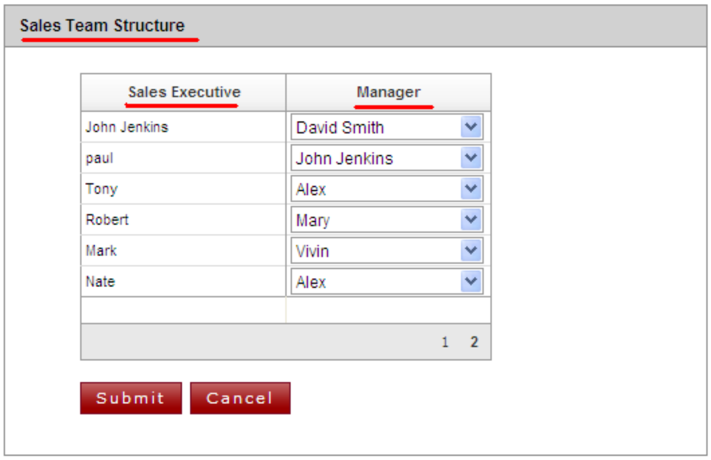
If a Product Group is selected and Add Product is clicked then all the Products within this Product Group which have not been selected so far will be added and Base Prices of these Products will also be added. The user can go and change the Price List from the drop down and delete any product which he does not want to add.

A Price List once created cannot be deleted.

See Also
Sales Setup
Adding Products
Adding Locations
Sales Team Structure
Maintaining Sales Team Structure
Defining Sales Targets
Application Setup and Account Management

Maintaining Sales Team Structure

To define the Sales Team Structure you need to select the Sales Executives who are part of the Sales teams and map their Manager. This mapping has to be completed for all the levels and only the overall Head of Sales team who is given the role of CEO in the application will not have any one mapped as the manager.



Possible Actions

- Edit to change the Manager for any Sales Executive
- Add to add a new Sales Executive and define his Manager in the table

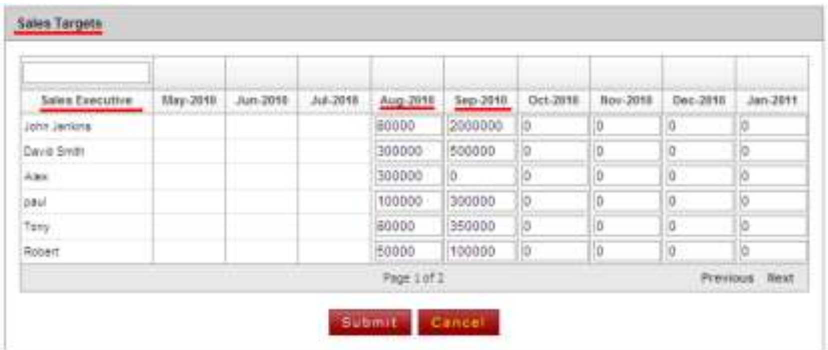
You can change this mapping at any point of time and this will impact the structure of the Team immediately. If a sales executive is not assigned a manager the system will still work but his data will not be visible to anyone above him in the hierarchy.

Note: If EazeWork's HR application is also subscribed to then the mapping of Sales Executive to Manager is managed in HR for all the common users. This is done to all the control of the process of changing Managers with HR.

See Also
Sales Setup
Adding Products
Adding Locations
Adding Price Lists
Defining Sales Targets
Application Setup and Account Management

Defining Sales Targets

Monthly Sales Targets for all Sales Executives can be defined in this section. This feature is useful if you want to track Month to Date performance against target. The application allows you to view the target and achievement for past three months and define targets for next 6 months.



Possible Actions

- You can enter modify the Sales Target for any Sales Executive by entering the value in the table

Note: Sales targets can be modified only for the current and future months.

See Also
Sales Setup
Adding Products
Adding Locations
Adding Price Lists
Defining Sales Targets
Application Setup and Account Management

Contacts

> Contacts are persons or companies with which your organization has a business relationship. A contact can be of many types – in Sales application Prospect and Customer contact types are available.

Categories of Contacts

Prospects
A potential customer is called a Prospect. Prospects can be of two types B2B or B2C, this depends upon your business model – this application is able to manage both B2B and B2C prospects and customers. While defining a Prospect there are some compulsory fields but a majority of data is optional.

Customers
After we successfully close a sale the Prospect migrates to become a Customer automatically in the application. We can also create customers directly into the system. Like Prospects, Customers also can be B2B or B2C. Information of orders, invoices, credit history, payments gets associated with the customer record.

Person Contact
Both B2B and B2C contacts have actual persons behind them with which the Sales Executives interact, in case of B2C this person contact is same as the B2C contact but in the case of the B2B there can be multiple person contacts. One of these multiple person contacts is identified as the Primary contact for a B2B contact.

Adding Contacts
Contacts can be added by anyone who has access to the application; this Contact is not visible to anyone else unless it is Submitted but once submitted the information is available to all. This access can be controlled through General Setup.

Editing Contacts
Only the Sales Support person or the Sales Executive assigned to the contact or his Manager can edit the Contact information. If the Contact is not assigned to a Sales Executive then anyone can edit it.

Deleting Contacts
There are two scenarios when under which a Contact can be deleted

1. Till it is not submitted or even after submission no dependent records have been created like Leads, Invoices or Sales Register entries then the Contact can be deleted by the person who is assigned as the Contact Owner
2. After Leads, Invoices etc have been created then the Contact cannot be deleted unless the Leads, Invoices etc are deleted. The option of deleting Leads, Invoices which have been closed is not given in this application as of now.

Viewing Contacts

Menu Path: Sales > Contacts
Accessible to: Sales User

On this page the user can view all the Contacts of the company. These Contacts can be seen as a list or as a card. In the list view you can filter the values to narrow the search down by any parameter which is listed in the table.
You can also Edit existing Contacts or Add new Contacts from this page in the list view. In the card view you get a snapshot of all the contacts in one page but you cannot edit from this view.

List of Contacts Table

Field	Input	Explanation
Company Name	System	Name of the B2B contact (this is empty in case of a B2C contact)
Person Name	System	Name of the person contact associated with this contact
Email	System	Email of the person contact
Office Phone	System	Office phone of the employee
Category	System	Category of the contact
Sales Executive	System	Name of the sales executive who has added the contact
Location	System	Location to which this contact is mapped

Possible Actions

- Edit and Delete the contacts through Edit and Delete mouse over command
- View Details: Click on hyperlink Company Name/Person Name to see the details of Contacts

To add a new contact you can click on the Add Contact button on the right hand side.

Mapping of Sales Executive to Contact

Each Contact can be assigned to a Sales Executive. This is not a compulsory requirement but if this is done then all the activities of that Contact are taken care by this Sales Executive.

Adding and Editing B2B Contacts

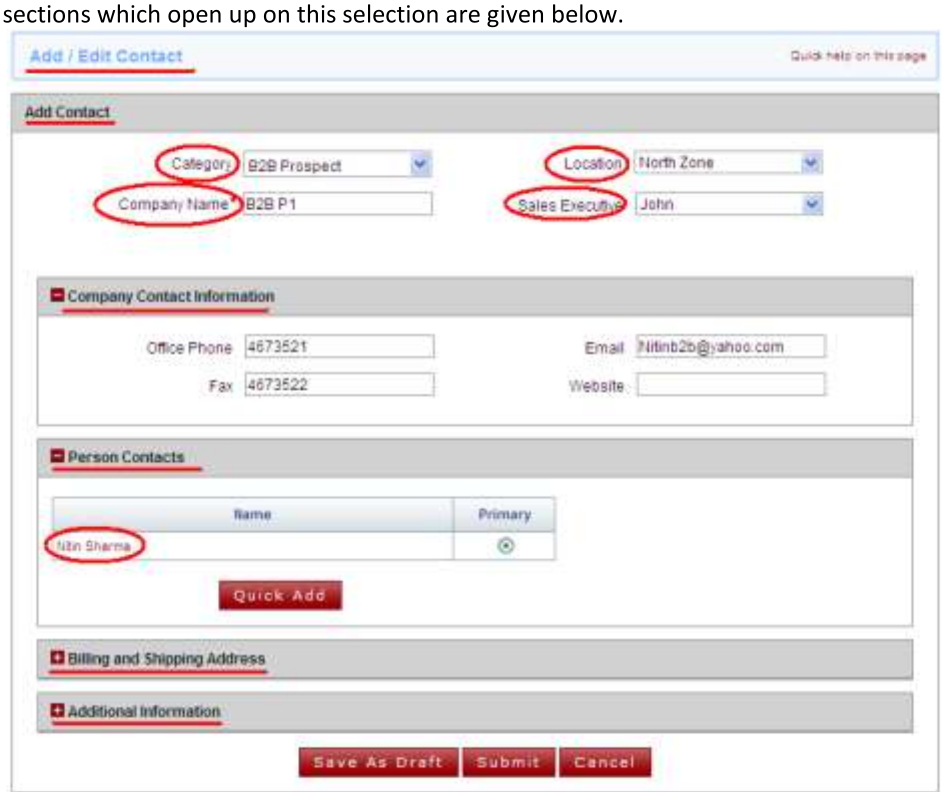
Menu Path: Sales > Contacts > Create
Accessible to: Sales User

Through this section you can add and edit both B2B and B2C Prospects or Customers. You need to fill all required details in the form. This form is divided into 4 sections:

- Company Contact Information
- Person Contact
- Billing and shipping Address and
- Additional Information

Adding B2B Prospect or B2B Customer

To add a B2B Prospect or B2B Customer select the appropriate Category drop down in Add Contact page. The sections which open up on this selection are given below.



Add Contact grid

Field	Input	Explanation
Category	Optional	Select contact category from drop down
Location	Optional	Select the location of the sales executive from the drop down
Sales Executive	System	Select the Sales Executive from drop down. This also get auto populated once Location is selected
Company Name	Compulsory	Enter name of the company whose details to be added

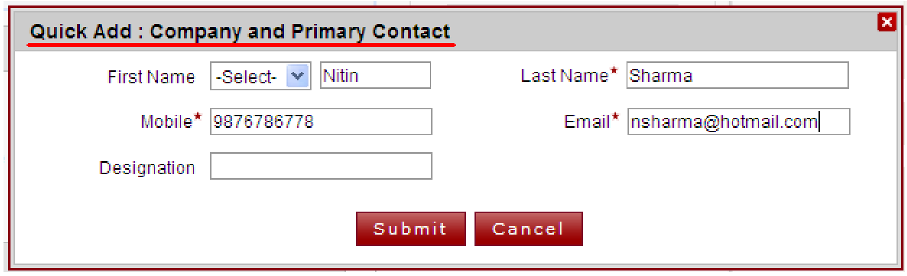
Company Contact Information

Field	Input	Explanation
Customer Code	Compulsory	This can be manually entered or can be auto-filled by system and is only needed when you are creating a Customer

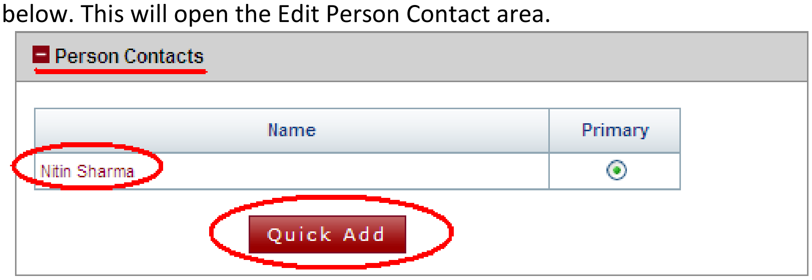
Office Phone	Optional	Enter Company's office phone number
Email	Optional	Company's email address
Fax	Optional	Enter company's Fax numbers
Website	Optional	Enter the name of company's website

Person Contacts

A B2B Prospect or Customer will have at least one person contact which will be marked as the Primary Contact. If you create more than one person contact you can change the Primary Contact.



You can add a person contact through the Quick Add button. This will open up a popup where you can enter the minimum details and at a later point of time add more details if you want to by clicking on the hyperlink as shown below. This will open the Edit Person Contact area.



Edit Person Contacts Table

Field	Input	Explanation
First Name	Optional	Enter the first name of the contact
Last Name	Compulsory	Enter the last Name of the contact
Mobile	Compulsory	Enter the mobile number of the contact
Email	Compulsory	Enter the email address of the contact (either this or mobile number is compulsory)
Phone(Off)	Optional	Enter the office phone number of the contact

Person Office Address and Home Address Table

Field	Input	Explanation
Office Address	Optional	Office address of the person contact, you can copy it from Company billing address
Street Address	Optional	Street number
Country	Optional	Enter the name of the country where company is located
State	Optional	Enter the name of the State where company is located
Other State	Optional	If the state name is not in the drop down then Other can be selected there and the name can be entered here
City	Optional	Enter the name of the city where company is located
Pin/Zip Code	Optional	Enter the Pin/Zip code of the country where company is located
Home Address	Optional	Click on check box if the home address is same as office address
Other Details	Optional	Same as office address

Person Additional Information Table

Field	Input	Explanation
Upload Photo	Optional	Provision is there to upload a photo of the person contact
Ratings	Optional	This rating gives an indication of the relationship shared with this person contact
Marital Status	Optional	Marital status of the contact
2nd Email	Optional	2nd email address of the contact
Phone(Residence)	Optional	Residence phone number of the contact
Birthday	Optional	Date of birth of the contact
Anniversary	Optional	Anniversary of the contact
Comments	Optional	Comments to capture any internal information on this person contact

Billing and Shipping Address

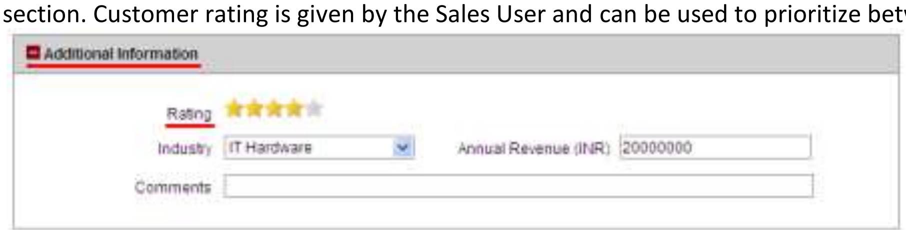
Billing and Shipping addresses are needed for Invoicing and Shipping of goods. This information is stored at the Contact level.

Billing and Shipping Address Table

Field	Input	Explanation
Billing Address	Optional	Billing address of the company
Street Address	Optional	Street number
Country	Optional	Enter the name of the country where company is located
State	Optional	Enter the name of the State where company is located
Other State	Optional	If the state name is not in the drop down then Other can be selected there and the name can be entered here
City	Optional	Enter the name of the city where company is located
Pin/Zip Code	Optional	Enter the Pin/Zip code of the country where company is located
Shipping Address	Optional	Click on check box if the address is same as billing address
Other Details	Optional	Same as billing address

Additional Information

Information on the industry, turnover, customer rating and internal comments about the contact are saved in this section. Customer rating is given by the Sales User and can be used to prioritize between customers.



Additional Information Table

Field	Input	Explanation
Industry	Optional	Select the type of Industry from the dropdown
Ratings	Optional	The higher the number of stars the higher is Customer rating
Annual Revenue	System	Annual revenue in the chosen currency in Setup
Comments	Optional	Comments about the customer for internal purposes

Adding and Editing B2C Contacts

Steps to be followed to create a B2B Prospect or Customer are similar to the steps to be followed in the previous section. For a quick reference see the section on Adding a B2B Prospect or Customer.

The differences are following

- There are no Company details in a B2C contact
- There is only one Person Contact

Converting a Prospect to a Customer

When the company successfully makes a sale to a Prospect it gets converted into a Customer. There are three ways of creating a Customer in this application

1. Winning a Lead: When you close a Lead with the status Won, the Prospect with which this Lead is associated automatically gets converted into a Customer. Refer to the section on Closing Leads for more details on how to close a Lead.
2. Manually creating a Customer: The process has been explained in the previous sections. When creating customer manually you will not be able to migrate his history of purchases but you can start using the application for subsequent activities.
3. Manually converting a Prospect: In case you have not entered a Lead in the system against a Prospect but there is a sale which you want to capture in the Sales Register or make an Invoice. In both the cases you will have to manually convert the Prospect into a Customer. Please refer to xxxx for more details.

See Also
Leads
Sales Register
Sales Invoices
Credit Limit
Collections

Leads

Leads are sales opportunities that come from a "Lead Source" and get associated with a "Contact". A Lead is managed by a team of Sales Executives with one of them have the role of "Lead Owner".

Lead Sources

Lead could be captured from multiple sources like

- Call center enquiry
    - Web site enquiry
    - Customer referral
    - Conference contacts
    - Sales man
    - Channel partners
    - Other …

These sources are pre-defined and can also be customized using Setup.

Lead Stages

Depending upon the nature of the business a typical Lead can go through one or many stages before it matures into a win or a loss. This application comes preconfigured with a set of Lead Stages which can be modified using Setup.

Lead Stage	Win Probability	Description
Unqualified	5%	Default first stage of a lead
Validated	10%	Second stage and can be customized, deleted by Application Administrator
Price Quoted	20%	Third stage and can be customized, deleted by Application Administrator
First Negotiation	30%	Fourth stage and can be customized, deleted by Application Administrator
Demonstration	45%	Fifth stage and can be customized, deleted by Application Administrator
Final Negotiation	60%	Sixth stage and can be customized, deleted by Application Administrator
Won	100%	One o f the Final stages of a lead, cannot be deleted
Lost	0%	One o f the Final stages of a lead, cannot be deleted
Deferred	0%	One o f the Final stages of a lead, cannot be deleted
Duplicate	0%	System defined stage for a lead which was closed since it was already existing as another lead

Lead Owner and Lead Team

Each Lead is assigned to a Sales Executive who is known as the Lead Owner, besides the Lead Owner there can be other Sales Executives also assigned to the Lead as Lead Team Members.

Lead Qualification

A lead can move from Unqualified to a later stage only if some information is provided. This information is called as qualification details and is available in Qualification details section. Price, Win Criteria, Expected Closure Date are some of the fields which are to be entered. If the Lead is in an early stage and product and price information is not available then these details can also be captured at a summary level.

Action Points
A set of pre-configured action points can be added to a Lead. These can be customized using Setup. Each Action Point has a description, due date, action type and is assigned to one of the Lead Team Members.

Internal Discussion
Lead Team Members can exchange notes on the lead with each other in a confidential manner. This feature helps in keeping a track of critical information which at times gets lost in emails.

Documents
Presentations, Product brochures, Account plan and any other documents which are associated with the Lead can be added.

Managing the Lead Process

Sales Management application helps in keeping track of leads and ensuring that information on its progress is available to all the interested parties. Table below gives a snapshot of the access levels given in the default setup to various types of person who interact with the lead.

Activity	Lead Owner		Team Members		Managers		Sales Support	
	View	Add / Edit	View	Add / Edit	View	Add / Edit	View	Add / Edit
Lead Details section	Y	Y	Y	N	Y	Y	Y	Y
Additional Details section	Y	Y	Y	N	Y	Y	N	N
Lead Team section	Y	Y	Y	N	Y	Y	N	N
Qualification Details section	Y	Y	Y	N	Y	Y	N	N
Action Points section	Y	Y	Y	Y	Y	Y	N	N
Internal Discussions section	Y	Y	Y	Y	Y	Y	N	N
Documents section	Y	Y	Y	Y	Y	Y	N	N

Note: Option to delete a lead is not given directly but closing a lead as Duplicate is as good as deleting it. The information of a lead closed as duplicate is not used for any reporting or analysis.

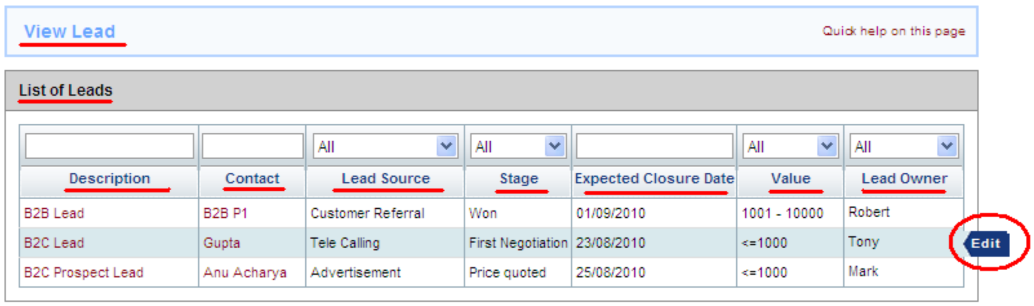
As the Lead matures the status of the Lead is to be updated and if required the ownership of the Lead can also be transferred to a different Sales Executive.

Viewing Leads

Menu Path: Sales > Lead>View Lead
Accessible to: Sales User

In View Lead sales user can view leads and its details.

View Leads



View Leads Table

Field	Input	Explanation
Description	System	Hyperlinked. Click on the hyperlink to see the details of the Lead
Contact	System	Company Name /Person Name
Lead Source	System	Can be multiple sources like, call center enquiry, customer referral
Lead Stage	System	Can be different lead stages as defined in setup by Application Administration
Exp Closure Date	System	Expected closure date for Lead
Value	System	Total expected value of this Lead
Lead Owner	System	Sales Executive who owns the Lead

Possible Actions

- Edit the Request: Click on hyperlink or the Edit mouse-over command.

See Also
Contacts
Sales Register
Sales Invoices
Credit Limit
Collections

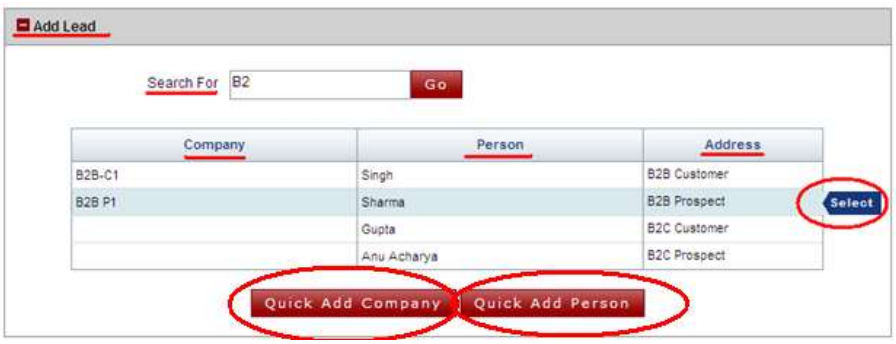
Adding or Editing Lead

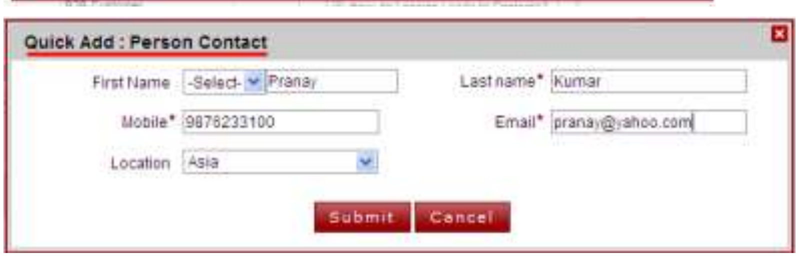
Menu Path: Sales > Leads>Add/Edit Leads
Accessible to: Sales User

To create a new Lead there are a recommended sequence of activities to be followed

1. Check the Leads to ensure that this opportunity is not already captured. This can be done by viewing the existing Leads mapped against the Contact in the View Lead page.
2. You can also do a search for the Contact with which you want to map this new Lead by using the Search For box which opens when you click on Add Lead . You need to only enter the name of the person or company against which you want to add this lead. An intelligent search will show you all the companies and persons in your database which match the input string. If you find your company / person in the results you can click on Select mouse-over command
3. If you don't find the company / person in the results you can either go to Contact section and add a new contact or use Quick Add Company button for a B2B contact or a Quick Add Person button for a B2C contact.

Search
Add Lead / Edit Lead



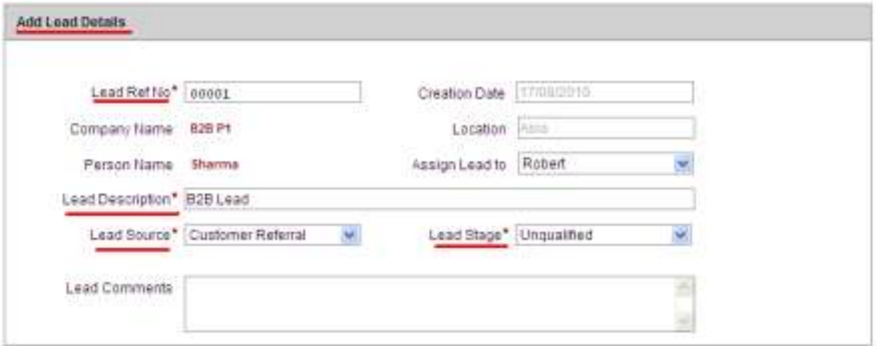


Search Box

Field	Input	Explanation
Search For	Compulsory	Click on the hyperlink on the Voucher No to view details
Company	System	Names of companies matching the search string
Person	System	Names of persons matching the search string
Address	System	Address of the contact

Lead Details

Information on Lead like date of creation, lead source, lead owner and lead stage is updated in this section.



Lead Details Table

Field	Input	Explanation
Lead Ref No	System	Reference number of the Lead
Creation Date	System	Date on which the lead was created
Company Name	Compulsory	Company to which this lead is belongs
Location	System	Location of the contact (this cannot be edited here)
Person Name	Compulsory	Primary person contact of a B2B contact or the B2C person contact
Assign Lead to	Optional	Select the sales executive from drop down
Lead Description	Optional	Enter lead description
Lead Source	Compulsory	Select the lead source from drop down
Lead Stage	Optional	Select the lead stage from the drop down
Other Source	Optional	If the lead source is not a part of the drop down you can add a new Source here

Lead Team

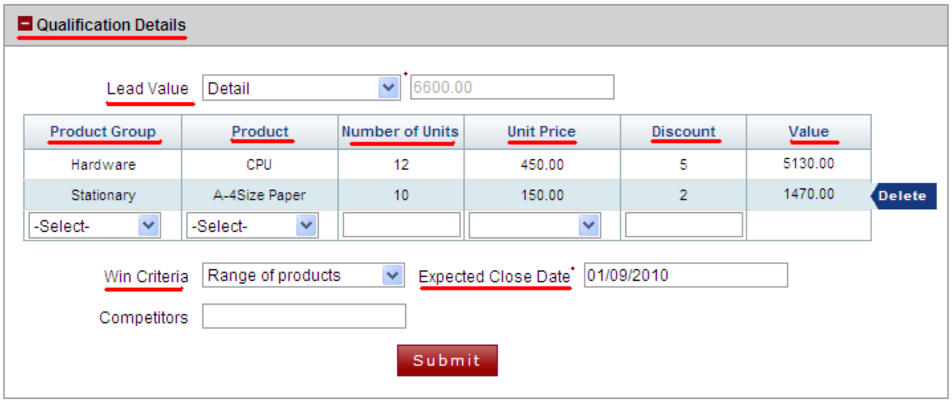
Lead Owner can add or remove Sales Executives from the Lead using this section.

Possible Actions

- Click on hyperlinked Remove from team through mouse over command to remove sales executive from the team
- Click on Submit button to add Sales Executives to the Lead Team

Qualification Details

Information on competition, win criteria, closure date and products and prices which are being discussed with the prospect are captured in this section. Lead Value can be captured at a Summary level or Detailed level, if Summary is selected then product and price details are not required to be added but if Detailed is selected then product and price information is to be added.



Qualification Details

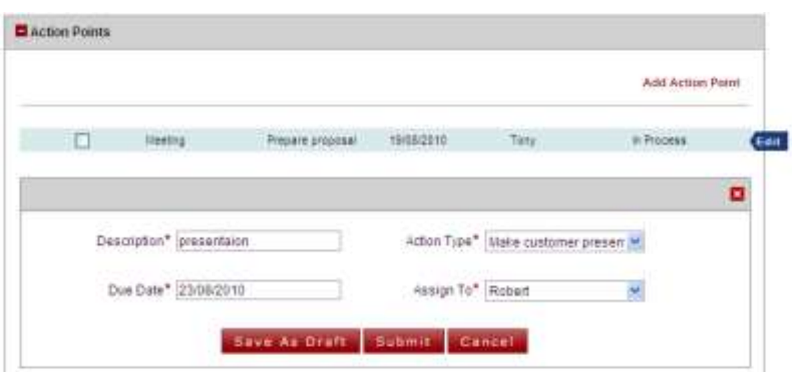
Field	Input	Explanation
Lead value	Compulsory	You can select either Summary or Detail from the drop down. If you select Detail then the information about the lead in terms of the product, units, discount has to be entered
Product Group	Compulsory	Select the product group from drop down
Product	Compulsory	Select the product from the drop down
No of Units	Compulsory	Enter the number of units
Unit Price	System	Gets updated automatically based on product
Discount	Optional	If you are discussing a discount with the customer you can enter that here. It has to be within the Maximum discount range for the product.
Value	System	Enter product value
Win Criteria	Optional	Select from drop down
Expected Close Date	Compulsory	Enter the expected closure date of lead
Competitors	Optional	Enter the names of the competitors if any

Possible Actions

- Click on Delete through mouse over command to delete the entry
- Click on Submit button to add Product Details

Action Points

A set of pre-configured action points can be added to a Lead. These can be customized using Setup. Each Action Point has a description, due date, action type and is assigned to one of the Lead Team Members.



Action Points

Field	Input	Explanation

Description	Compulsory	Enter the description of the action point
Action Type	Compulsory	Select action type from drop down
Due Date	Compulsory	Date on which this action is expected to be completed
Assign To	Compulsory	Select Team member to whom the action has to be assigned from the drop down

Possible Actions

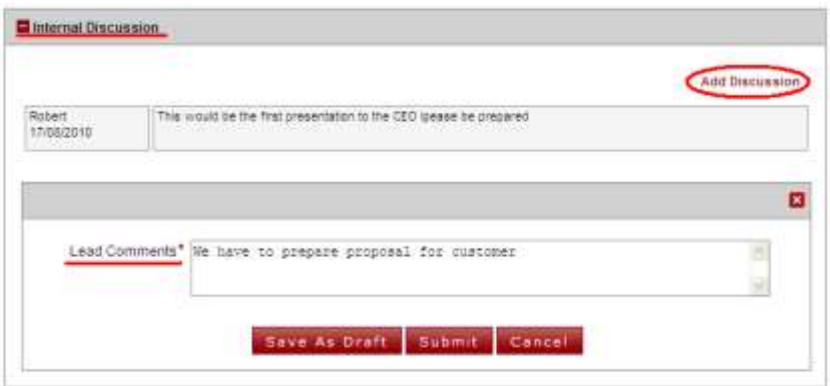
- You can Edit and Submit through mouse over commands Edit & Submit
- Only Lead Owner can delete the action though Delete mouse over command
- Click on Submit button to add Action Point

Updating Action Points

Only the Lead Owner or the Team member to whom the Action Point has been assigned can update it.

Internal Discussion

Lead Team Members can exchange notes on the lead with each other in a confidential manner. This feature helps in keeping a track of critical information which at times gets lost in emails.



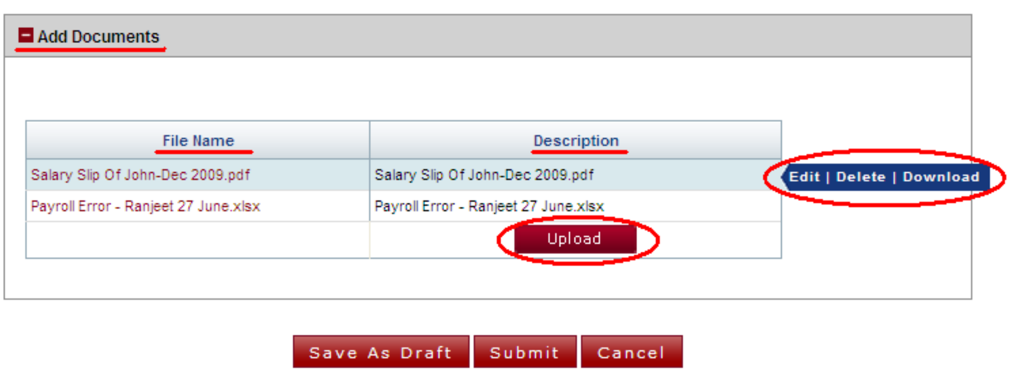
Possible Actions

- Click on Submit button to add a discussion point

Note: Once submitted the discussion cannot be edited or deleted.

Documents

Presentations, Product brochures, Account plan and any other documents which are associated with the Lead can be added in this Section.



Possible Actions

- You can Edit, Delete or Download the documents through Edit , Delete , Download mouse over commands

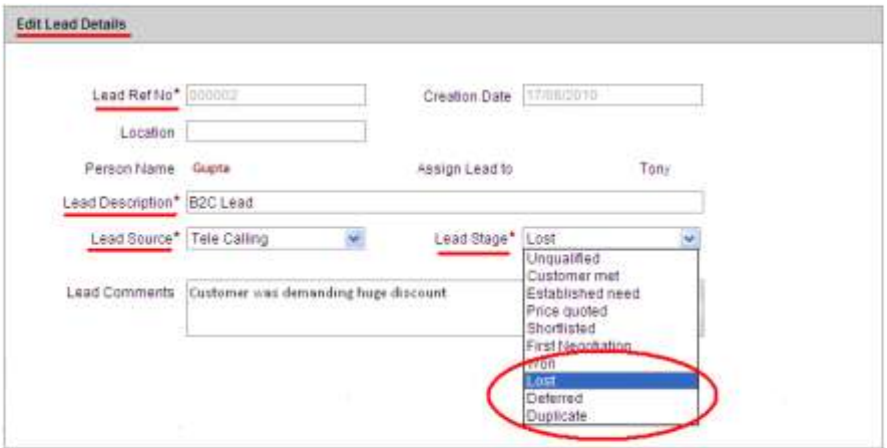
- After filling all the required fields in the form click on Submit button to complete the action

Closing Leads

When we assign the Lead one of the following stages

- Wong
- Lost
- Deferred
- Duplicate

Then the Lead is treated as “Closed”. A closed Lead cannot be edited or used again.



Close Leads Table

Field	Input	Explanation
Lead Ref No	System	Reference number of the lead
Close Date	System	Closing date of the lead
Description	System	Description of the leave
Lead Owner	System	On whose name the lead was first assigned
Lead Value	System	Can be multiple sources like, call center enquiry, customer referral
Current Status	System	Current status of the lead
Final Lead Stage	Compulsory	Select the final lead stage from drop down
Assign To	Optional	Select Employee name from drop down – this is applicable only when the Lead is closed as Won
Final Comment	Optional	Any comments which are to be put

Possible Actions

- If you are not sure of your entries please click on Save as Draft, with this your request will get saved but not submitted and once you are confirmed that your entries are valid click on Submit. On submission the lead will get closed successfully.

When you close a Lead as Won and assign it to someone this lead is stored as an Invoice in draft status on the View Invoice page. Refer to Creating an Invoice for more information on how to create an Invoice.

See Also
Contacts
Sales Register
Sales Invoices
Credit Limit
Collections

Sales Register

> Sales can be done against an invoice or against cash. Cash sales are typically done over a counter or with customers who do not need an invoice. Sales Register is a used to capture such cash sales.

Sales Register is meant to capture cash sales on a daily basis and the application also allows Sales Executives (or Sales Support or their Manager acting on their behalf) to update sales for some days in past. The number of days in past is customizable in Setup. For any given day the Sales Executives can update the sales any number of times.

Once the Sales Register is submitted for processing an alert goes to the Accountant who is responsible for collecting the cash from the Sales Executive and he is made aware of the sales done by the Sales Executive.

Allowing Sales without Customer name

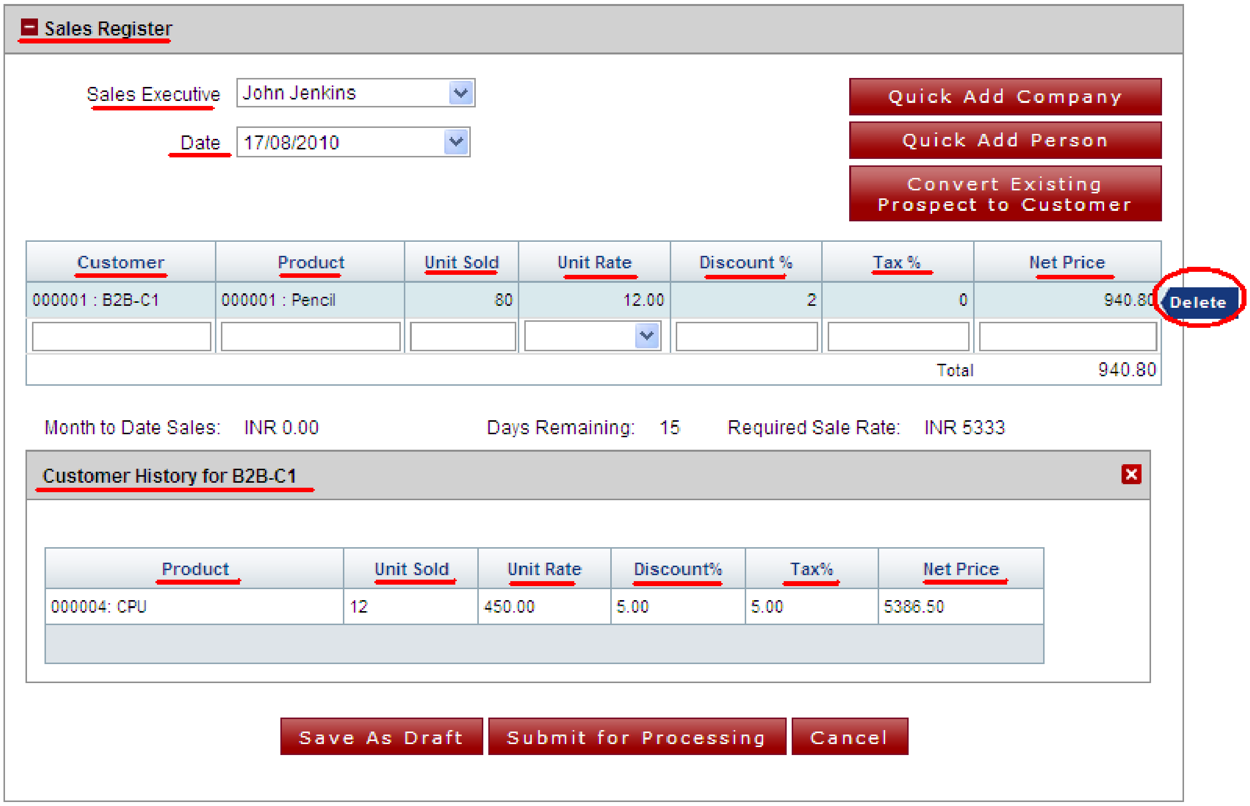
If in Setup the setting to allow booking sales without customer name is selected then the Sales Register can be created without a customer name – otherwise each sale has to be made against a customer.

Creating Sales Register

Menu Path: Sales > Sales > Sales Register
Accessible to: Sales User, Sales Support, Managers

To submit a Sales Register there are a recommended sequence of activities to be followed

1. If you are the Sales Support person select the Sales Executive for whom you have to create the Sales Register. If you are a Manager you can create the Sales Register for any Sales Executive in your team
2. Enter the Customer Name or Code if you want to but this is optional
3. If it's a new customer you can use Quick Add Company or Quick Add Person buttons to add a new B2B or B2C customer. If you want to select from existing list of Prospects you can use Convert Existing Prospect to Customer button
4. Enter the Product – you can enter the first few letters of the product description or product code and the options will come from where you can select the right product
5. Enter number of Units sold
6. Select the rate – there should be only one rate but sometimes Sales Executives is authorized to sell the same product at different rates in different locations
7. Enter the discount you want to pass on to the customer
8. Enter any tax which is to be added to the product price
9. You can repeat steps 2 to 8 for any number of times and once you have created multiple rows you can submit the Sales Register for processing



Sales Register Table

Field	Input	Explanation
Date	Compulsory	Select the date for which you want to create the Sales Register
Sales Executive	Compulsory	Name of the Sales Executive for whom the Sales Register is to be created
Customer	Optional	Provide the Customer Name or Code to select the Customer
Product	Compulsory	Provide the Product Description or Code to select the Product
Units Sold	Compulsory	Number of units sold (this should be in the units of measure as defined in setup)
Unit Rate	Compulsory	Price as per the Price Lists available to the Sales Executive
Discount %	Optional	Discount to be passed on to the customer
Tax %	Optional	Tax applicable on the sale
Net Price	System	System calculates the final price which is to be paid

Possible Actions

- If you are not sure of your entries please click on Save as Draft, with this your request will get Saved but not submitted and once you are confirmed that your entries are valid click on Submit for Processing. On submission the Sales Register will get transferred to Accountant.

Sales Target Information

As the Sales are updated the Sales figures for Month to date sales are also updated. This together with the number of days remaining in the month for sales will give the required daily rate of sale.

Reviewing Cash to be Submitted

Sales Cash to be submitted

Sales Executive: John Jenkins

Date	Total Sales Amount	Total Recieved Amount	Amount Pending
17/08/2010	6327.30	0.00	6327.30
Total	6327.30	0.00	6327.30

Sales Executives can also find out the amount of cash they need to deposit with the Accountant. To do this they can view the Cash to be Submitted table and find out the total amount which is pending on them for depositing. This feature can also be used by the Managers to find out the amount of cash which is pending with the Sales Executive for submission.

See Also
Contacts
Leads
Sales Invoices
Credit Limit
Collections

Sales Invoices

Sales Invoice is the document which indicates the shipment of goods or fulfillment of services by the Company. This is an important document which captures the commercial and legal terms between the Company and Customer.

Sales Invoices is a document which captures critical information about the sale which is made to a customer. Some companies require a Purchase Order from the customer and a Sales Order in their own system before they proceed to create an Invoice. In this application Sales Orders are not captured and Purchase Orders provided by the customers can be referred to in the Invoice.

Elements of an Invoice

Following information is needed to complete an Invoice.

Invoice Number and Date

These are system generated by default but Application Administrator can configure in Setup to allow for Invoice number to be manually created.

Customer Name

Each Invoice is created for one and only one customer.

Delivery Date

This is the date on which the customer is expecting the delivery. When the invoice is created this date is an estimate since at the time of invoicing it is not known with certainty as to when the Products will be delivered. This date can be updated when the delivery is made. A comparison of Invoice date and Delivery date can tell a company the time it takes for products to reach the customer.

Shipping and Billing Addresses

This information is inherited from the customer but if the addresses have to be changed at the Invoice level they can be changed. In other words, one customer can have one standard shipping and billing address but these can vary at Invoice level.

Payment Terms

Payment terms are standard terms which are allowed by the Accounts department of the company. The Application Administrator can customize these in Setup to meet your company's requirement. These cannot be modified by the Sales Executive at the Invoice level.

Payment Due Date

A target date for realizing 100% payment is entered here by the Sales Executive or Sales Support staff creating the invoice. This should be in line with Payment terms but since it is an independent manual entry there is no check as such.

Purchase Order Number

PO given by customer can be referred to in the Invoice.
If customer has given a Purchase Order then its number can be entered here. If there is a new PO then it can added

Product and Pricing Details
Number of units sold, unit rate, discount, tax, freight, insurance all these details have to be entered for every Product which is to be put in the Invoice.

Customer Notes
Any communication which has to be printed on the Invoice to inform to the customer can be captured.
Invoice

Internal Notes
Points for internal discussion can be entered here, for example instructions to the shipping team or to the accounts. These are not visible to the customer and can only be seen by the company people.

Payment Details
Payment against an Invoice can be collected in various ways - all these details including advance collections need to be captured. If the customer has an outstanding Credit Note it can also be adjusted against the Invoice.

Invoice Terms and Conditions
A set of standard terms and conditions which are associated with each Invoice can be maintained in the setup in Invoice Terms section. These are visible in the printed copy or the pdf of the Invoice.

Invoice Statuses

An Invoice can have the following statuses

Draft
This is when the Invoice is not submitted and is only available with the Sales Executive in a draft state.

Credit Hold
On submission of Invoice if there is insufficient credit balance in the customer's account the Invoice gets held up in the credit check process and its status is marked as Credit Hold.

Due
On submission and if the Invoice is not held up due to credit check the status of Invoice immediately becomes Due. This implies that the payments are expected against this Invoice.

Overdue
When the Payment due date is crossed the Invoice is assigned Overdue status. Overdue Invoices are tracked and reported in Aging analysis.

Paid
Invoice for which all payments have been made is shown in Paid status.

All these statuses are assigned automatically through the system as other events are captured. These statuses cannot be modified manually.

See Also
Contacts
Leads
Sales Register
Credit Limit
Collections

Creating an Invoice

Menu Path: Sales > Sales > New Invoice
Accessible to: Sales User

This page is used to create Invoice. An Invoice can be created in two ways

1. Using [Add New Invoice] button on the Sales > Invoice page
2. Converting an Invoice which is auto created with a draft status when a Lead is closed with the status Won

To create an Invoice there are a recommended sequence of activities to be followed

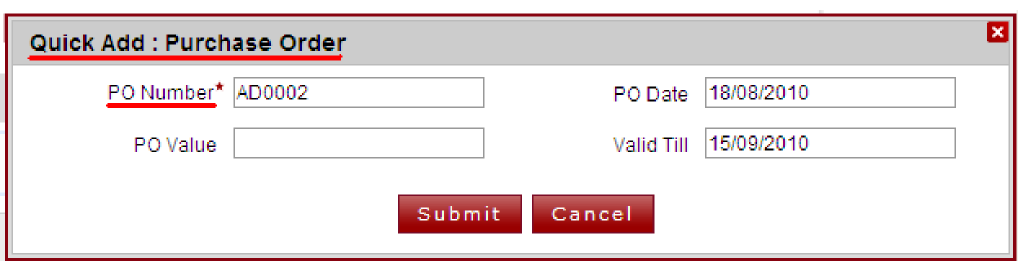
1. Click on Add New Invoice button or Edit an Invoice in draft state to go to Sales > Sales > New Invoice page
2. If it's a new Invoice first search for the Customers or Prospects for which you want to create the Invoice. This is done by entering the name or code of the Customer or Prospect in the Search For box.
3. If you want you can also add a new Customer by using [Quick Add Company] or [Quick Add Person] to add a B2B or B2C customer
4. Once the customer name is entered you are taken to a form where you can enter other invoice details like – delivery date, payment term, payment due date, shipping and billing address (if different from customer records), product details and payment details
5. Once all the information is entered you can submit the Invoice. On submission of the Invoice the automated Credit check process is carried out. Click on Credit Check to understand how credit check process works.

Changing Shipping and Billing Address

If the shipping or billing address have to be changed you can click on the hyperlink, this will open up a form where you can modify and save the new shipping or billing address. This change is done locally and does not impact the Customer's primary shipping and billing addresses.

Adding PO

If the customer has sent a PO and you want to refer to it in the Invoice then you can click on [Quick Add New PO] button to enter the details of a new PO.



Adding Product Details

All the details like Product Code, Units, Discount, Tax, Freight, Insurance have to be entered. These details cannot be modified once the Invoice is submitted.

Product Details

Product	Unit Sold	Unit Rate	Discount %	Tax %	Net Price
000004 : CPU	15	450.00	0	5	7087.50
				Total	7087.50
				Freight	200
				Insurance	4000
				Total	11287.50

Adding Payment Information

Any payment received before the Invoice is created as an advance needs to be recorded in this section.

Payment Details

Mode	Detail	Received Date	Amouunt
Cash		17/08/2010	3000
-Select-			
		Total	3000.00

Viewing or Editing an Invoice

Menu Path: Sales > Sales > Invoice
Accessible to: Sales User

Viewing an Invoice

All the Invoices can be viewed from this page.

View Invoice

Customer Code	Company	Person	Invoice Number	Sales Executive	Invoice Status
000002		Abhinav Gupta	000002	John	Credit Hold
000001	My Corp Gurgaon	Ashish Jain	000001	John	Paid

Editing an Invoice

The invoice can be edited at any time till it is released from Credit Check. After it is released it cannot be edited. To edit an Invoice you can click on the Invoice number or you can use the Edit mouse-over command.

See Also
Contacts
Leads
Sales Register
Credit Limit
Collections

Credit Limit

Credit Limits are used to control the financial exposure of a Company with a Customer. Supplies which are being made to customer are allowed as long as the total outstanding amount is less than the credit limit. Credit limit is defined and maintained by the Account Head for each customer.

A default credit limit is used to assign a value to a new customer. This default credit limit value is configurable and can be managed by Application Administrator in General Setup.

Invoices on Credit Hold

When an Invoice is submitted it goes through a credit check process. The process is illustrated with the following example.

Example

a) Credit Limit of customer A is 100,000
b) An invoice of 55,000 is submitted – there is no advance payment against this invoice. This invoice clears the credit check and available credit limit is reduced to 45,000
c) Another invoice of 80,000 is submitted. This invoice will not clear the credit check because
Credit required = 80,000 is greater than 45,000 (available credit limit)
d) Although the second invoice is held up due to insufficient credit the available credit limit remains at 45,000
e) A third invoice of 30,000 is submitted; this gets cleared as the credit required 30,000 is less than 45,0000 the available credit limit but now the available credit limit gets reduced to 15,000
f) The second invoice can be cleared only when
   a) payment of atleast 65,000 is collected against it

Note: if payment is collected as advance against an invoice – 40,000 against invoice 2 in the above example the invoice will only move out of credit hold when the Accountant updates this payment as realized in Collections section.

Releasing Invoice on Credit Hold

Release of Invoices on Credit Hold is governed by a setting in Setup “Allow auto clearing of Invoices”.

Auto clearance of Invoices

When “Allow auto clearing of Invoices” is selected as Yes, Invoices will get cleared on a first in first out basis as soon as payments are received and available credit limit goes up above the outstanding payment in invoice. This is shown with an example

Example

A regular customer would have multiple invoices at various stages of payment, suppose two of his invoices are in credit hold

1) Invoice 1 : Value 80,000 : dated 14-Mar-2010, payment received = 0
2) Invoice 2 : Value 90,000 : dated 18-Mar-2010, payment received = 0
3) Credit limit = 100,000 Available credit limit = 40,000
4) There are two possibilities now
   a) Suppose now a payment of 45,000 is received against some other invoices for this customer. The available credit limit goes upto 95,000. Since Invoice 1 is earlier and its value is less than the available credit limit this invoice will automatically get cleared. When more than one Invoice is eligible for clearance the earlier one gets the priority
   b) Instead of a) suppose the payment of 50,000 is received against Invoice 2 then Invoice 2 will get cleared automatically as its credit shortfall is 40,000 which is equal to the available credit limit

Manual clearance of Invoices

When “Allow auto clearing of Invoices” is selected as No, Invoices will have to be released manually. Taking the same example which is outlined above - whether a payment is received against another Invoice or against Invoice 1 or 2 the invoices will have to be released from credit hold by the Account Head. It is going to be his decision on which Invoice is to be released.

See Also
Contacts
Leads
Sales Register
Sales Invoices
Collections

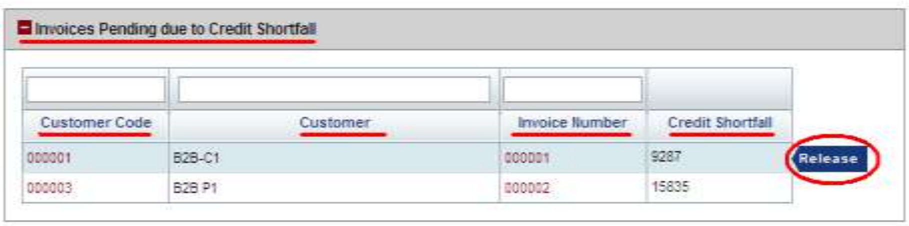
Managing Credit Limits

Menu Path: Sales > Sales > Credit Check
Accessible to: Account Head

There are two sections in this page – to review and release Invoices which are on credit hold and to review the payment history of a customer and change his credit limit. Both these functions are necessary to ensure that credit control is managed properly.

Review and Release Invoices

Use the table Invoiced Pending due to Credit Shortfall to see which invoices are on credit hold and release them.



Invoice Pending due to Credit Shortfall Table

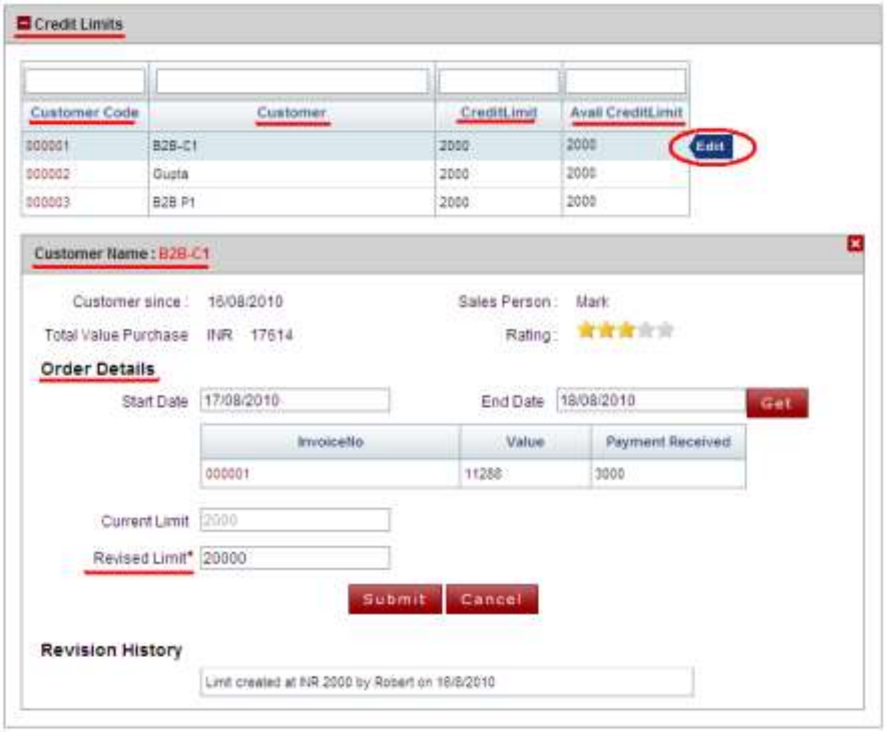
Field	Input	Explanation
Customer Code	System	Customer code
Customer	System	Customer name
Invoice Number	System	Invoice number
Credit Shortfall	System	Amount by which the invoice is held up

Possible Actions

- Account Head can release these invoices by using Release mouse-over command or clicking on Invoice number hyperlink. This command has different function whether the Setup of auto Invoice clearance is on auto or manual.

Increasing Credit Limit

Account Head can access the payment history for any customer through this section. Using this he can take a decision if the credit limit of a customer has to be increased, decreased or maintained at the same level.



Credit Limits Table

Field	Input	Explanation
Customer Code	System	Customer code
Customer	System	Customer name
Credit Limit	System	Current total credit limit
Available Credit	System	Currently available credit limit

Possible Action

- Edit a Credit Limit by clicking on the Edit mouse-over command, this will open up a new div which is shown below
- Clicking on hyper linked Customer Code you can view the details of Customer

By entering a Start date and End date the Account Head can do a query on all the orders received in this period and the total payment realized. Account Head can then enter a new value in Revised Limit field and save it.

See Also

Managing Collections

Collections

Payments are collected by the Sales Executives and updated in the company accounts through various methods. Once the payments are realized the records of Sales Register and Invoices are updated by the Accountant.

Companies have different processes when it comes to collecting money from the customers. Some assign this responsibility to Sales, some assign it to Accounts. In either case it's a two step process of collecting the money from the customer and then the company realizing it into its accounts. The gap between collection and realization is due to delays in checks or online payments being processed or even if cash is received the tallying of cash against sales records.

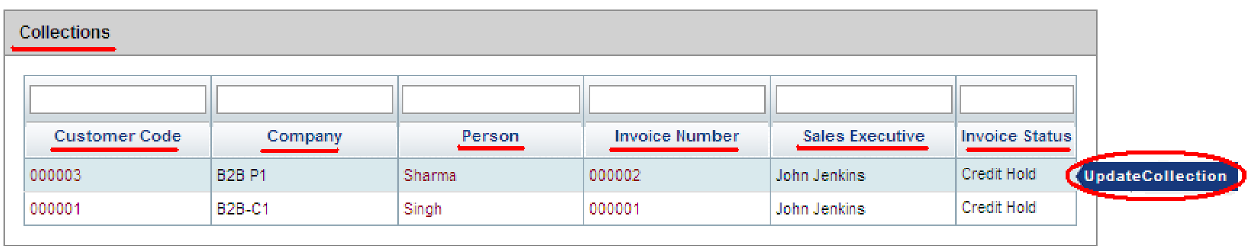
Collections are managed by the Accountant; multiple users can have this role.

Managing Collections

Menu Path: Sales > Collections
Accessible to: Accountant

Updating Payments against Invoices

Payment against an Invoice can reach the company from various channels. The responsibility of first recording the receipt of payment and then realization of the amount is with the Accountant. This section is used to update and maintain payments



Possible Action

- Use Update Collections mouse-over command, this will open up a new div which is shown below
- Clicking on hyper linked Customer Code you can view the details of Customer
- Clicking on hyper linked Invoice Numbr you can view the details of the Invoice

Use this form to update the collections which are received. Assigning collections to Invoices is very important since that allows tracking of payment at an Invoice level.

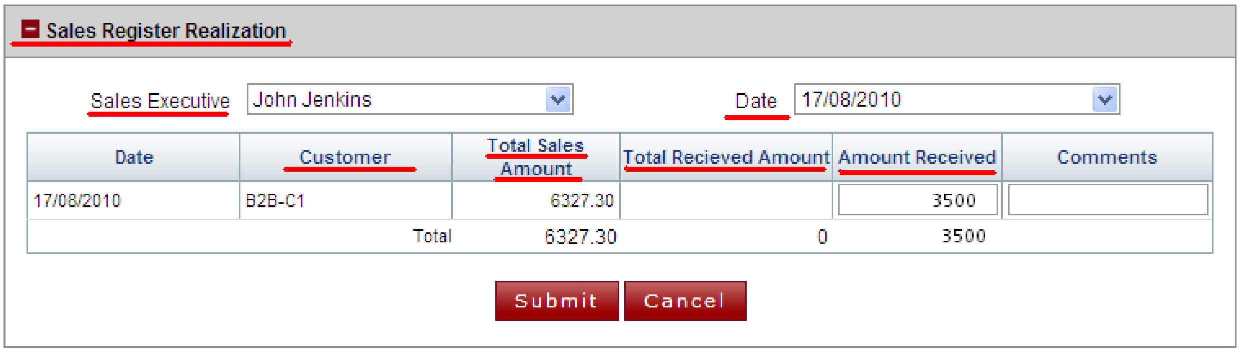
Possible Action

- Enter the details of mode of payment, details, receipt date, received amount, realized date, realized amount. These details can be edited and corrected till the Invoice is in Due or Overdue status. Once the Invoice is in Paid status these changes cannot be made.

Invoice status would change to Paid only when all the payment due agains the Invoice is realized.

Updating Payment against Sales Register

For Sales captured through the Sales Register the payments are received almost immediately. Sales Executives are responsible for collecting and transferring the money collected to the Accountant.



To update collections against sales captured through Sales Register there are a recommended sequence of activities to be followed

1) Select the name of the Sales Executive and the Date for which the collection is to be updated
2) A record of sales captured through Sales Register opens up with following details
   a) Total Sales amount as recorded by the Sales Executive
   b) Total Received amount – this is a sum of all the receipts updated by the Accountant so far
3) Accountant updates the Amount Received in a separate column. He has the option to enter this information for each row or to just enter the total value in the last row.
4) He can also enter the comments in the last column.
5) If the total value entered is less than the total amount which was to be received then the allocation against the records will be done from the top rows. The gap between total sales and total received amounts will remain in the bottom rows.
6) On clicking Submit the information is saved.
7) At any point of time Accountant can recall this page and update additional receipts. He can also edit and reduce the amount if there have been totaling errors but he cannot receive more than the sales value.

See Also

Contacts
Leads
Sales Register
Sales Invoices
Credit Limit

Sales Application Reports

Standard reports are available with EazeWork these reports are accessible from Reports Menu. All Users, Sales Support, Account Head, Accountant, Sales Managers, CEO can access these reports but can view only relevant data.

Reports in Sales application have the following features

- Export to Excel: reports can be exported and saved as a Microsoft Excel document
- Export to PDF: reports can be exported and saved as an Adobe Acrobat document
- Print: you can print the report locally
- Email : report can be emailed to your registered email id

Users can decide what is the level of aggregation which they want in numbers and reports can be generated in thousands, millions, lakhs, crores etc.

Standard Reports

There are 4 sections and 13 reports in total which are available as Standard Reports in Sales.

Custom Reports

At this stage the feature to create custom reports is not there.

<u>Sales Activity Reports</u>

Wins

This report shows the leads that have been won in a period and some summary information. This report is available to all Users to view, download and print.

Losses

This report shows the leads that have been lost in a period and some summary information. This report is accessible to

- Users: For their own leads
- Managers: to see leads of their teams
- CEO: can see all leads

Leads with No Activity

This report shows the leads that have had no activity for a certain number of days; the number of days is taken as an input. This report is accessible to

- Users: For their own leads
- Managers: to see leads of their teams
- CEO: can see all leads

Product Sales by Month

This report shows the monthly sales across all products. This report is accessible only to the CEO who can see all sales data.

Target Vs Achievement
This report will show the performance of Sales Executives on Target Vs Achievement. The period for the report can be selected by the user. Report is accessible to

- Users: For their own records
- Managers: to see records of their teams
- CEO: can see all records

Sales Funnel
Sales funnel is useful report to get a snapshot of the leads and their closure dates. The Sales funnel can be viewed for a Product, Product Group, Location, and Sales Executive. This report is accessible to

- Users: For their own records
- Managers: to see records of their teams
- CEO: can see all records

Summary Reports

Top Leads
This report shows the top leads by probable lead value. Probable lead value is a product of the lead value and win probability. This report is accessible to

- Users: For their own leads
- Managers: to see leads of their teams
- CEO: can see all leads

Top Customers
This report shows the top customers by sales. The report can be run for any time-period and sales booked only in the time-period will be considered in the report. This report is accessible to all.

Top Prospects
This report shows the top prospects. This is similar to Top Leads report but this is aggregated at the customer level. Report can be filtered for top x customers where x is entered by the user. Report is accessible to

- Users: For their own prospects
- Managers: to see prospects of their teams
- CEO: can see all prospects

Top Locations
This report shows the top locations in terms of sales for a period. Sale at a location is measured through sales recorded by the Sales Executive of that location. This report is accessible to all.

Top Sales Executives
This report shows the top performing Sales Executives on sales for a given period which can be entered by the user. This report is accessible to all.

Outstanding Payments

Customer Outstandings

This report shows the aging analysis of the accounts receivables. All the invoices which have pending payments against them are covered in this report but information is presented in an aggregate form. Report is accessible to

- Users: For their own customers
- Managers: to see customers of their teams
- Account Head and CEO: can see all customer outstandings

Outstanding Invoices

This report shows the outstanding by invoice and through this report users can track down invoices which are delayed. Report is accessible to

- Users: For their own invoices
- Managers: to see invoices of their teams
- Account Head and CEO: can see all outstanding invoices

Sales Masters

Product Location Price Report

This report shows the list of Products with their Sales Price available at a location for sale. Report is accessible to

- Users: For their own locations
- Managers: to see locations of their teams
- CEO: can see all locations

End of Document