

VO Sales Management

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Disclaimer: The screen shots below is for training purposes, it might be not exactly the same as yours.

Chapter 1: Virtual Office Sales Management

Virtual Office Sales Management provide the features for:

- ✓ Leads Management - record, distribute and allocate sales leads
- ✓ Opportunity Management - process sales prospects by products/services
- ✓ Sales Analysis - Forecast, pipeline, sales history, activity reporting and defining rules for calculating probability and weighted values for sales prospects
- ✓ Sales Forecast - measure productivity and estimate future sales
- ✓ Sales Management - Handling of sales teams
- ✓ Quotation Management - Issuing and handling of quotation
- ✓ Customer Relationship Management (CRM) - Storing customers data and history
- ✓ Progress Reporting - Multiple sales processes/activities and overview of factors that influence sales
- ✓ Scheduling - Appointment/event scheduling management
- ✓ WorkFlow - Automating work and business processes to complete/deliver a business transaction

Tips:

Follow the sequence as below, you will able to learn how to manipulate Virtual Office Sales Management:



Chapter 2: Admin Settings

Sales Management is divided into 3 main settings: **Sales**, **Manager** and **Admin**.

For a start, the preliminary step is to configure the Admin Settings.

Go to: Virtual Office > BizApp > Sales Management > Admin

Note: Before a user is able to configure the Admin setting, this user must ensure that him/her has the access right to the setting. The setting can be done within the VOAdmin Control Panel (**avomaster** > **UCAR**). (Please refer to your account administrator for the UCAR setting)

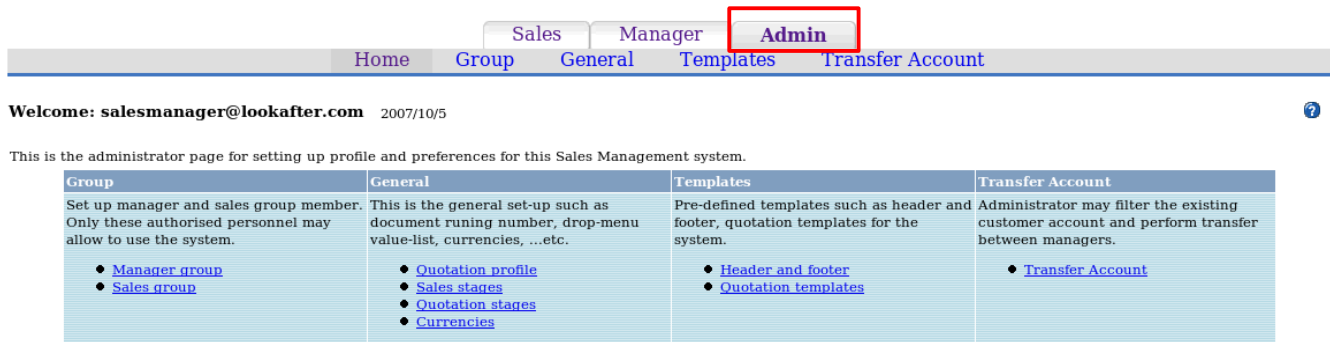


Figure 2.1

- Group** To select the users of Sales Management
- General** Allow Sales Management User to Manage Quotation profile, Sales and Quotation Stages setup and Currencies setup
- Template** Quotation Template Management
- Transfer account** Transfer an ongoing account from Person A to B

Group Setting

Add a Manager:

Group
Set up manager and sales group member. Only these authorised personnel may allow to use the system.

- [Manager group](#)
- [Sales group](#)

Home Group Sales Manager Admin
General Templates Transfer Account

Welcome: salesmanager@lookafter.com 2007/10/5
Group: **Manager group**

<input type="checkbox"/> abc.name.2dots	<input type="checkbox"/> admen	<input type="checkbox"/> agasthiar
<input type="checkbox"/> ahbeng	<input type="checkbox"/> ahmed	<input type="checkbox"/> akow
<input type="checkbox"/> alexloy	<input type="checkbox"/> alicia	<input type="checkbox"/> alson
<input type="checkbox"/> alvinkum	<input type="checkbox"/> andrea	<input type="checkbox"/> andy
<input checked="" type="checkbox"/> philipteh	<input type="checkbox"/> pmwong	<input checked="" type="checkbox"/> pojen
<input type="checkbox"/> Queenie	<input type="checkbox"/> qwas	<input checked="" type="checkbox"/> salesmanager
<input type="checkbox"/> salesperson	<input type="checkbox"/> salim	<input type="checkbox"/> sam
<input type="checkbox"/> scss	<input type="checkbox"/> sctai	<input type="checkbox"/> sctan
<input type="checkbox"/> shaharudin	<input type="checkbox"/> sharon	<input type="checkbox"/> sherene
<input checked="" type="checkbox"/> sjng	<input type="checkbox"/> smlim	<input type="checkbox"/> smtsou
<input type="checkbox"/> soong	<input type="checkbox"/> soonheng	<input checked="" type="checkbox"/> sschan
<input type="checkbox"/> steve	<input type="checkbox"/> tansl	<input checked="" type="checkbox"/> teckkhen
<input type="checkbox"/> test	<input type="checkbox"/> test1	<input type="checkbox"/> testing
<input type="checkbox"/> thloke	<input type="checkbox"/> tungkm	<input checked="" type="checkbox"/> weechong
<input type="checkbox"/> yew	<input type="checkbox"/> yian	<input type="checkbox"/> yong
<input type="checkbox"/> yoongyoong		

Update Now

Figure 2.2

1. Click Manager Group to select Sales Manager(s) from the user list
2. Click **Update Now** to update the Sales Manager Group List

Note: In this manual, *salesmanager* acts as a Sales Management **Admin** and **Manager**.

Add a Sales Person:

Group
Set up manager and sales group member.
Only these authorised personnel may allow to use the system.

- [Manager group](#)
- [Sales group](#)

Home Sales Manager Admin
Group General Templates Transfer Account

Manager group **Sales group**

Group: Sales group

<input type="checkbox"/> abc.name.2dots	<input type="checkbox"/> admen	<input type="checkbox"/> agasthiar
<input checked="" type="checkbox"/> ahbeng	<input type="checkbox"/> ahmed	<input type="checkbox"/> akow
<input type="checkbox"/> alexloy	<input type="checkbox"/> alicia	<input type="checkbox"/> alson
<input type="checkbox"/> alvinkum	<input type="checkbox"/> andrea	<input type="checkbox"/> andy
<input type="checkbox"/> andy888	<input type="checkbox"/> andylau	<input type="checkbox"/> andylim
<input checked="" type="checkbox"/> philipteh	<input type="checkbox"/> pmwong	<input checked="" type="checkbox"/> pojen
<input type="checkbox"/> Queenie	<input type="checkbox"/> qwas	<input type="checkbox"/> salesmanager
<input checked="" type="checkbox"/> salesperson	<input type="checkbox"/> salim	<input type="checkbox"/> sam
<input type="checkbox"/> scss	<input type="checkbox"/> sctai	<input type="checkbox"/> sctan
<input type="checkbox"/> shaharudin	<input type="checkbox"/> sharon	<input type="checkbox"/> sherene
<input checked="" type="checkbox"/> sjng	<input type="checkbox"/> smlim	<input type="checkbox"/> smtsou
<input type="checkbox"/> soong	<input type="checkbox"/> soonheng	<input checked="" type="checkbox"/> sschan
<input type="checkbox"/> steve	<input type="checkbox"/> tansl	<input checked="" type="checkbox"/> teckkhen
<input type="checkbox"/> test	<input type="checkbox"/> test1	<input type="checkbox"/> testing
<input type="checkbox"/> thloke	<input type="checkbox"/> tungkm	<input checked="" type="checkbox"/> weechong
<input type="checkbox"/> yew	<input type="checkbox"/> yian	<input type="checkbox"/> yong
<input type="checkbox"/> yoongyoong		

Update Now

Figure 2.3

1. Click Sales group to select the Salesperson(s)
2. Click **Update Now** for update the salesperson group list.

Note: In this manual, *salesperson* acts as a Salesperson for the Sales Management.

General Settings

Quotation Profile:

General

This is the general set-up such as document running number, drop-menu value-list, currencies, ...etc.

- [Quotation profile](#)
- [Sales stages](#)
- [Quotation stages](#)
- [Currencies](#)

[General](#) | [Sales stage](#) | [Quotation stage](#) | [Currency](#)

Welcome: **salesmanager@lookafter.com** 2007/10/8

General:

Quotation:

*Ref. number: **100015**
100015 (Only numeric entry)
This number will be assign to the next new quotation created

*Delete account notify: Yes
Full email separate with a coma ",":
avomaster@lookafter.com

To set or Reset the running number for your quotation

If this option is unchecked, the person added below will not be able to receive any report notification.

The user added here will be notified if any account within this module is being deleted. This is to ensure there is no abuse of usage.

Click **Update Now** for saving the changes

Figure 2.4

Sales Stages:

General

This is the general set-up such as document running number, drop-menu value-list, currencies, ...etc.

- [Quotation profile](#)
- [Sales stages](#)
- [Quotation stages](#)
- [Currencies](#)

General | **Sales stage** | Quotation stage | Currency

Welcome: salesmanager@lookafter.com 2007/10/8
 General: **Sales Stage List (Value List)**

IMPORTANT: Quotes are NOT allow (' or ")

	Current Use	Default
Required	Prospecting	Prospecting
<input checked="" type="checkbox"/>	Qualification	Qualification
<input checked="" type="checkbox"/>	Need Analysis	Need Analysis
<input checked="" type="checkbox"/>	Value Proposition	Value Proposition
<input checked="" type="checkbox"/>	Identified Decision Maker	Identified Decision Maker
<input checked="" type="checkbox"/>	Perception Analysis	Perception Analysis
<input checked="" type="checkbox"/>	Proposal/ Price Quote	Proposal / Price Quote
<input checked="" type="checkbox"/>	Negotiation/ Review	Negotiation / Review
Required	Close Won	Close Won
Required	Close Lost	Close Lost

Use Default

Save Setting

Figure 2.5

To define your Sales Stage options here. You will need to define the Sales Stage while you create a new Opportunities. The defined stages will be shown in the drop down menu of **Create New Opportunity** page.

Amount: MYR 5000

Expected close: 2007/10/31 YYYY/MM/DD

Sales stage: **Prospecting**

Probability:

- Prospecting
- Qualification
- Need Analysis
- Value Position
- Identified Decesion Maker
- Perception Analysis
- Proposal / Price Quote
- Negotiation / Review

Figure 2.6

After you have defined the options for the Sales stage, you will see them under the create new opportunity page

Notes: There is no fix values for the Sales Stage. It varies with your company policy

Quotation Stages:

General

This is the general set-up such as document running number, drop-menu value-list, currencies, ...etc.

- [Quotation profile](#)
- [Sales stages](#)
- [Quotation stages](#)
- [Currencies](#)

General | Sales stage | **Quotation stage** | Currency

Welcome: salesmanager@lookafter.com 2007/10/8
General: Quotation Stage Setting (value list)

IMPORTANT: Quotes are NOT allow (' or ")

	Current using	Default
Required	Draft	Draft
Required	Confirmed	Confirmed
Required	Submitted	Submitted
<input checked="" type="checkbox"/>	Negotiation	Negotiation
<input checked="" type="checkbox"/>	On Hold	On Hold
<input checked="" type="checkbox"/>	Keep In View	Keep In View
<input type="checkbox"/>		Nil
<input type="checkbox"/>		Nil

Use Default

Save Setting

Figure 2.7

This is the setting allowing you to define the stages of the quotation, whether is Pending , Draft , Submitted etc. Draft , Confirmed and Submitted are the system default stages for the quotation. You may add on as you deemed fit.

Confirmed A confirmed copy of the quotation

Draft Draft copy of the Quotation

Submitted A quotation which has been submitted to the customer

Currency Settings:

General

This is the general set-up such as document running number, drop-menu value-list, currencies, ...etc.

- [Quotation profile](#)
- [Sales stages](#)
- [Quotation stages](#)
- [Currencies](#)

General | Sales stage | Quotation stage | **Currency**

Welcome: salesmanager@lookafter.com 2007/10/8

Currency:

* Required!:

	Country	Currency* (Unique entry)	Exchange rate with the principle currency (Only numeric entry)
Principle currency	Ringgit Malaysia	MYR *	
	Euro	EUR	5
	Japan Yen	JPY	0.03
	China Renminbi	CNY	0.5
	Taiwan New Dollars	TWD	0.1
	US dollar	USD	3.5
	Singapore Dollars	SGD	2.3

Enter the business currency details here (country, rate)

Update Now

Click **Update Now** for saving the changes

Figure 2.7

Notes: If your business is running in more than one country, you may set the currency rate here in order to allow the salesperson to choose a foreign currency for foreign sales.

Chapter 3: Manager & Salesperson Settings

After the Admin settings, the Admin/Manager may proceed to setup the Virtual Office Sales Management Users settings. (This included Salesperson and Manager settings)

The sequence needed:

- Select sales team (Only Managers are allowed to perform this task)
- Add Accounts/ Leads (add prospect/customer)

Select Sales Team (For Manager Only)

Go to Virtual Office > BizApp > Sales Management > Manager Tab > Setting

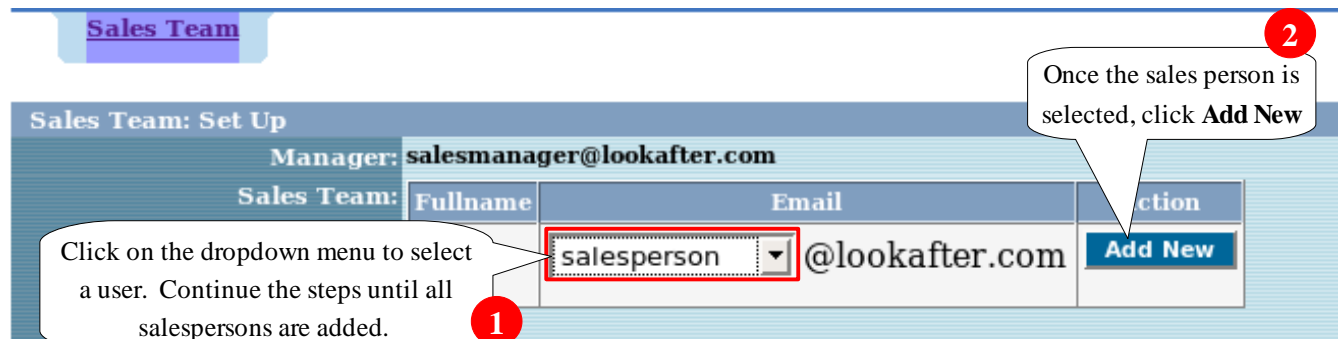


Figure 3.1

Note: For selecting a salesperson, the user must be added into the sales group before you select from the dropdown menu. Please see “Add a Sales Person” page.

Fullname	Email	Action
-	ahbeng @lookafter.com	Add New
salesperson	salesperson@lookafter.com	<input type="checkbox"/> Delete

Figure 3.2

User salesperson@lookafter.com is now added into the sales team of the manager, salesmanager@lookafter.com.

Add a new Customer Database(Lead) Both Manager and Salesperson are allowed

To add a new customer, Go to Virtual Office > BizApp > Sales Management > Manager/Sales Tab > Leads

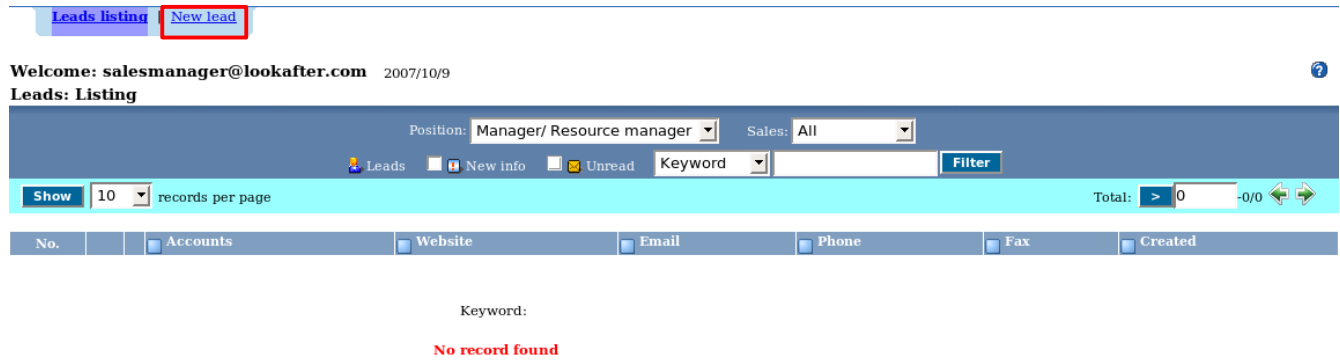


Figure 3.3

Total: 0-0/0

Click on **New lead** (figure 3.3), for adding new customer database.

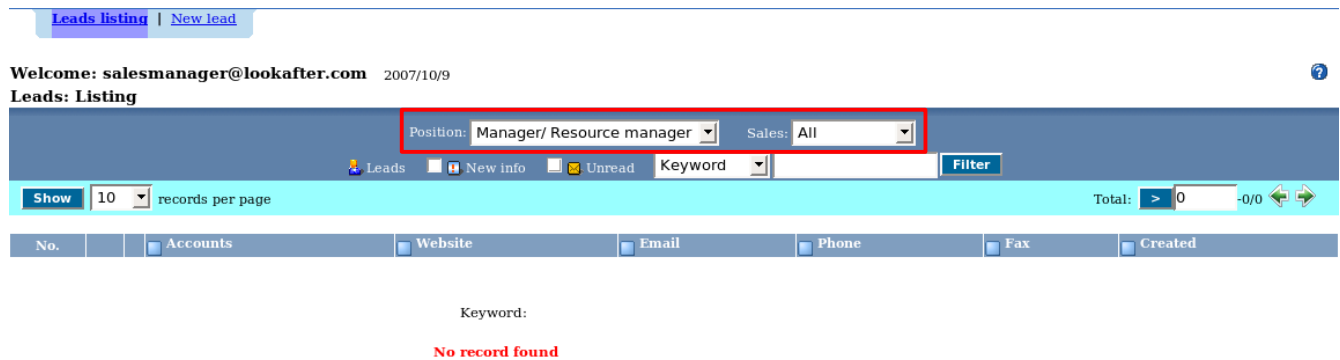


Figure 3.3a

Total: 0-0/0

Tips ⚡

The circled part (figure 3.3a) **only** available under **Manager page**. This is a function to allow Manager to search a record by position and by salesperson, while a Salesperson can only search within his/her own database.

Add New Lead page: [Leads listing](#) | [New lead](#)

Lead - prospective customer Account existing customer/closed lead Active customer Active customer KIV For future consideration (Keep In View)

Add New Lead:

Account Information

*Stage: LEAD ACCOUNT

*Condition: ACTIVE KIV

*Account name:

Registration No.:

Website:

Industry: --None--

Type: Prospect

*Status: Warm

*Currency: Ringgit Malaysia - MYR

Phone:

Fax:

Email:

Employees:

Annual Revenue:

Mailing Information

Street:

City:

Postal code:

State/ Province:

Country:

Contact Information

Fullname	Email	Phone	Position
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Management Information

Start date: 2007/10/09

*Manager: salesmanager@lool

*Sales:

Resource manager:

1	2	3	4
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
email notify of this assignment? <input type="radio"/> Yes <input type="radio"/> No	email notify of this assignment? <input type="radio"/> Yes <input type="radio"/> No	email notify of this assignment? <input type="radio"/> Yes <input type="radio"/> No	email notify of this assignment? <input type="radio"/> Yes <input type="radio"/> No
		<input checked="" type="checkbox"/> Comment to sales rep.	<input checked="" type="checkbox"/> Receive sales rep. email notify.
		<input checked="" type="checkbox"/> Comment to sales rep.	<input checked="" type="checkbox"/> Receive sales rep. email notify.

Remark:

Submit Now **Reset**

Figure 3.4

Once the form has been filled up, click **Submit Now** to save the details.

Note: *Lead* is the new prospective customer for the business. Once this leads is closed, it will become a customer and the information will be moved to *Account*. (*Account* = existing customer)

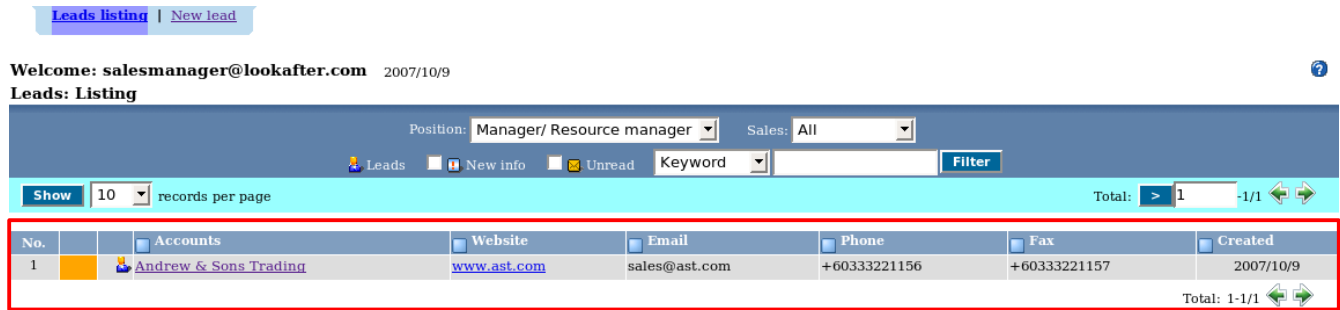


Figure 3.5

New lead added to lead list.

Tips

- * You **need not** to add this lead to account again because once a salesperson closed a transaction, this lead will **automatically** become a customer within Account.
- * If you have existing customer, you may add the customer **directly** through Account
- * **how-to** Add a new account? Repeat the steps for Add a new customer (lead) for adding an existing customer (Figure 3.4 3.5), Go to **Virtual Office > BizApp > Sales Management > Manager/Sales tab > Accounts**

To setup a Calendar

The calendar within the Sales Management is a quick link for you to access and manage your schedule. Please ensure that you have subscribed to the Calendar module in order to access it. To start, go to your Calender to build your calendar name and define the setting. Please see Calender User manual.

Build Calendar from the Sales Management

For selecting a calendar as your sales calendar, you may go to:

Virtual Office > BizApp > Sales Management > Manager/Sales tab > Home (left panel)

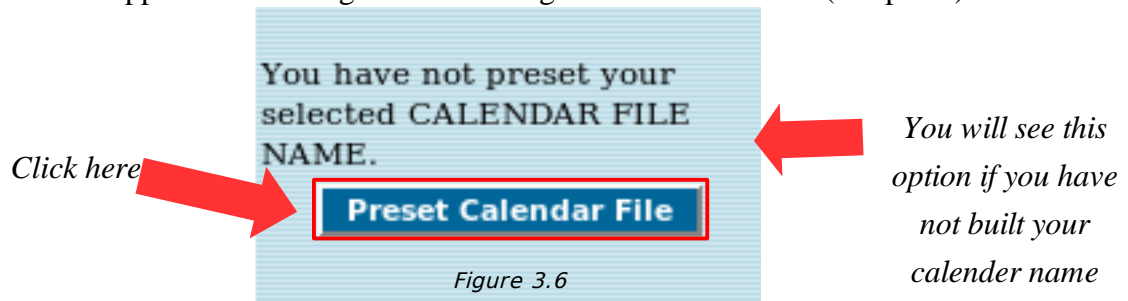


Figure 3.6

OR,

Virtual Office > BizApp > Sales Management > Manager/Sales > Calendar

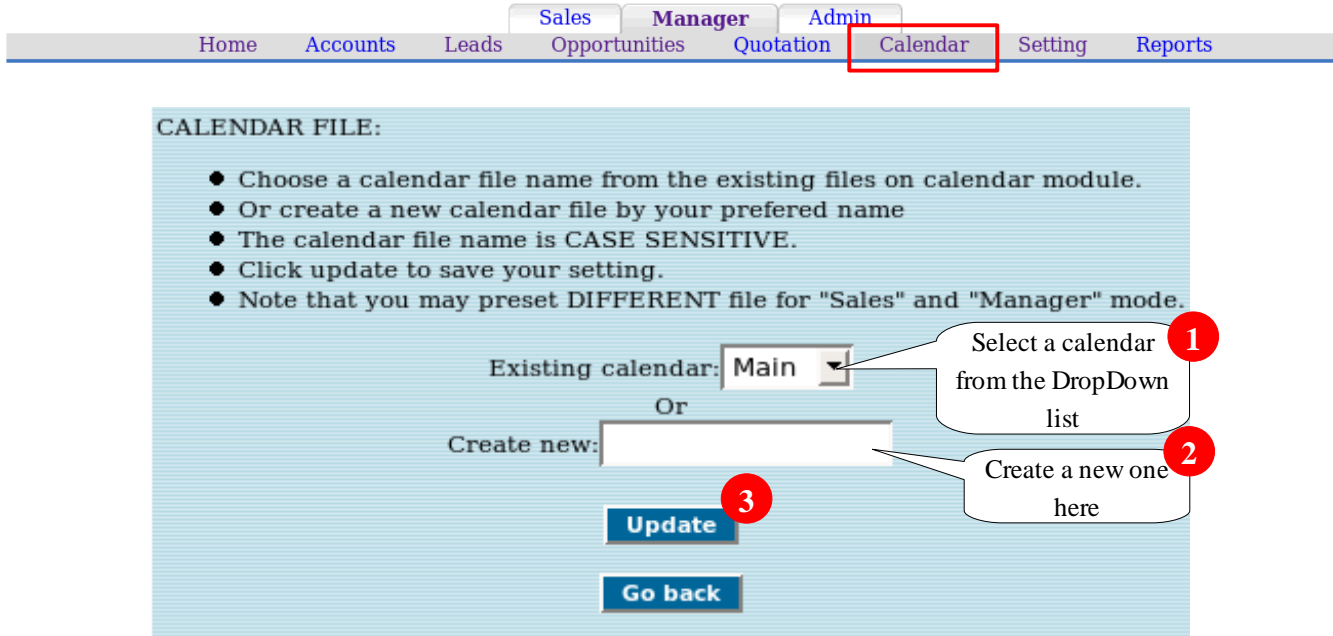


Figure 3.7

Virtual Office Sales Management Calendar is directly link with Virtual Office Calendar. You may update your event and view the content in either module.

User may click on their **Calendar tab** to view their events. The highlighted part (figure 3.8) will be your upcoming events or added events.

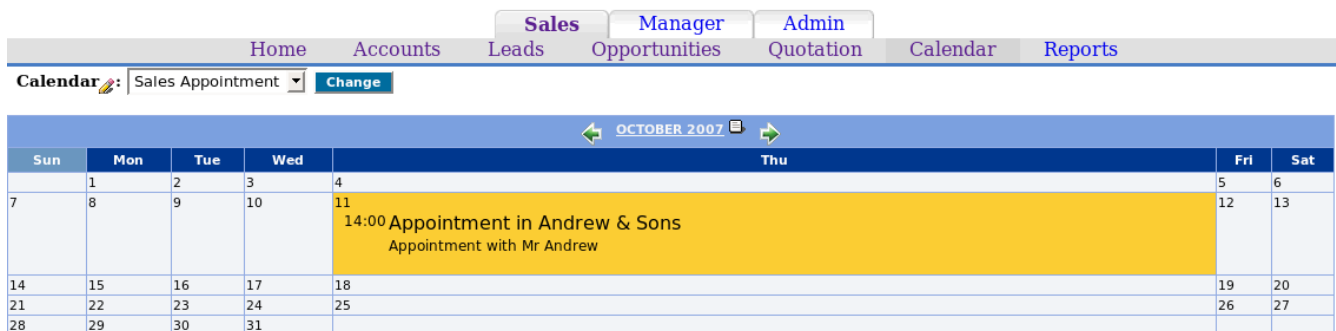


Figure 3.8

Note: Please ensure the calendar name has been created in your Virtual Office Calendar in order for the you to choose one. More information on Virtual Office Calendar, you may refer to Virtual Office Calendar User manual or visit to <http://www.afteroffice.com/guide/calendar.html>

Chapter 4: Sales Management

In this chapter, you will learn the steps to:

- Enter a Sales record
- How to issue a quotation
- Close a Sales (Close won or Close lose)
- View sales report

The screenshot shows the Sales Management dashboard with several key components and callouts:

- Information Panel:** Displays user details (salesperson@lookafter.com), date (2007/10/10), and statistics: Number of leads: 4, Number of opportunities: 0.
- Calendar:** Shows a calendar for October 2007. The 11th is highlighted with a red circle and a callout: "upcoming event (highlighted) Click to view the event details".
- My Selected Opportunities:** A section with a message: "You have not selected any opportunity! You may pick opportunities as your own selection to list here." A callout points to this area: "Your preset Calendar".
- My Top Opportunities:** A section with a message: "No top opportunity available! You do not have existing parent account to create opportunities under it." A callout points to this area: "This column display your selected Opportunities".
- Leads Table:** A table listing leads with columns: No., Account, Email, Phone, Fax, and Created. The first four rows are visible:

No.	Account	Email	Phone	Fax	Created
1	Andrew & Sons Trading	sales@ast.com	+60333221156	+60333221157	2007/10/9
2	Benjamin Foods	marketing@benfoods.com	+60386861212	+60386861213	2007/10/9
3	Muthu Nasi Kandar	info@mnasikandar.com	+6042353535	+6042353536	2007/10/9
4	Zainal SDN BHD	zainal@zainalsb.com	+6072356444	+6072356445	2007/10/9

 A callout points to the table: "The added Lead".
- Sales Status Summary:** A chart and summary for October 2007 showing: Progressing: 0.00, Close Won: 0.00, Close Lost: 0.00. A callout points to this: "Summary of your sales status".
- Quick Access:** A section for "Accounts / Leads" with a "Keyword:" field, a "Filter" button, and "Create new" buttons. A callout points to this: "Quick access for searching or adding a new lead".
- Priority Opportunities:** A callout points to the top of the page: "Display your priority opportunities".

Figure 4.1

Page above (figure 4.1) is the home page of Sales Management.

Enter a Sales Record

Leads: New						
No.		Account	Email	Phone	Fax	Created
1		Andrew & Sons Trading	sales@ast.com	+60333221156	+60333221157	2007/10/9
2		Benjamin Foods	marketing@benfoods.com	+60386861212	+60386861213	2007/10/9
3		Muthu Nasi Kandar	info@mnasikandar.com	+6042353535	+6042353536	2007/10/9
4		Zainal SDN BHD	zainal@zainalsb.com	+6072356444	+6072356445	2007/10/9

Select a lead **1**

Figure 4.2

Leads listing | [New lead](#)

Lead: Detail << Full detail >> [Set Reminder/ Appointment](#)

Account Information

*Stage: Lead	*Status: Warm
*Condition: ACTIVE	*Currency: MYR
*Account name: Andrew & Sons Trading A-123456	Website: www.ast.com
Address: 25, Industry Street, Kuala Lumpur 53000 Kuala Lumpur Malaysia	Email: sales@ast.com Phone: +60333221156 Fax: +60333221157 Manager: salesmanager@lookafter.com Sales: salesperson@lookafter.com

Contact

Full name	Email	Phone	Position
Andrew	sales@ast.com	+60333221156	Director

[Opportunities](#) **New Opportunity**

Opportunities
Sales stage: Progressing Filter

Opportunity	Amount	Created	Close	Sales Stage	Probability	Sales
No record found						

Create a New Opportunity **2**

} If there is any previous opportunity, it will display here

Figure 4.3

Sales Manager opportunity page

On the **Manager** page, there is an option for the manager to select the assignee to this opportunity, including the manager himself/herself.
 Note: Only able to select from the assigned salesperson(s) of this account. If the person he/she wish to assign the opportunity to is not within the available list, the manager will have to go back to the Account details to add the sales into this account.

Opportunities: Add New

Opportunity Information

*Account name: Andrew Sons Trading

Opportunity name: Sales of Packaging Mach

My Selection

Type: New Business

Manager: salesmanager@lookafter.com

Sales: salesperson@lookafter.com

Description: Customer would like to order a few machine for packaging purposes

Amount: MYR5000

Expected close: 2007/10/31

Sales stage: Prospecting

Probability: 85%

Submit

Back to lead detail

Figure 4.4

7 Sales Stage options:

There are a few options for Sales Stage. For defining this Sales Stage, you may refer back to Chapter 2. (Figure 2.5-2.6)

Probability - To estimate the probability for closing this opportunity. (ranging from 5%-95%)

*Note: If the lead is created by a **Manager**, he or she will have to assign the opportunity to a salesperson(s). A manager can assigned multiple salespersons to one lead, but only one salesperson to one opportunity. If the lead is created by a **Salesperson** or has already been assigned to him/her, he/she will automatically be the assignee of the opportunity.*

The sales manager can monitor the staff's results and activity levels, while the salesperson can follow up his/her own customers and the manager can monitor sales and forecast orders for relevant products.

Home Accounts Leads Opportunities Quotation Calendar Reports

Welcome: salesperson@lookafter.com 2007/10/10

Information
 ^custnumber: 0
 Number of leads: 4
 Number of opportunities: 1

OCTOBER 2007

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Sales status: Oct 2007

My Selected Opportunities

Opportunities	Accounts	Amount	Created	Close	Sales Stage	Probability
Sales of Packaging Machine	Andrew & Sons Trading	MYR5000.00	2007/10/10	2007/10/31	Prospecting	85%

My Top Opportunities

Opportunities	Accounts	Amount	Created	Close	Sales Stage	Probability
Sales of Packaging Machine	Andrew & Sons Trading	MYR5000.00	2007/10/10	2007/10/31	Prospecting	85%

Leads: New

No.	Account	Email	Phone	Fax	Created
1	Benjamin Foods	marketing@benfoods.com	+60386861212	+60386861213	2007/10/9
2	Muthu Nasi Kandar	info@mnasikandar.com	+6042353535	+6042353536	2007/10/9
3	Zainal SDN BHD	zainal@zainalsb.com	+6072356444	+6072356445	2007/10/9

Figure 4.5

On the Sales Management **Home Page** (figure4.5), the opportunity will be displayed on the top. If this opportunity is selected as **My Selection**, it will be displayed under **My Selected Opportunities**.

Opportunities listing

Welcome: salesperson@lookafter.com 2007/10/10

Opportunities: Listing

Sales Stage: All

Unread My Selection

Keyword

Show 10 records per page Total: 1 -1/1

No.	Opportunities	Account	Amount	Created	Close date	Sales stage	Probability
1	Sales of Packaging Machine	Andrew & Sons Trading	MYR5000.00	2007/10/10	2007/10/31	Prospecting	85%

Figure 4.6

On the **Opportunity** page (figure 4.6), you will be able to view this particular opportunity as well.

*Note: You may conduct a search of opportunities by sales stages, keyword, opportunities and account. You also may filter the record by **Unread** or **My Selection** opportunities as well.*

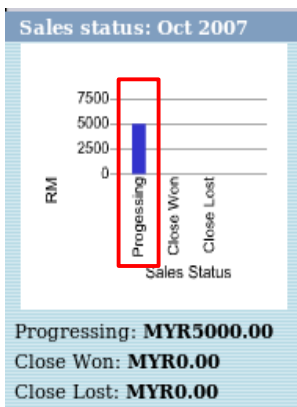


Figure 4.7

On the homepage, you will be able to view an immediate summary (figure 4.7) of the updated status report for this opportunity. The anticipated sales amount entered is now being added to **Processing** figure.

Manage An Opportunity

Journal Posting: *to make a new report on the account*

Go to Virtual Office > BizApp > Sales Management > Sales/Manager > Opportunities

Select any created opportunity and you will be able to view the details page (as per figure 4.8).

Opportunities listing

Opportunities: Detail [Event Calendar](#) | [Biz Process Flow](#)

Account Information

Account name: **Andrew & Sons Trading** A-123456 Website: [www.ast.com](#)

Open opportunities: **1** Email: [sales@ast.com](#)

Address: 25, Industry Street, Phone: +60333221156

Kuala Lumpur 53000 Fax: +60333221157
Kuala Lumpur
Malaysia

Contact	Full name	Email	Phone	Position
	Andrew	sales@ast.com	+60333221156	Director

Opportunity Information

Opportunity name: **Sales of Packaging Machine My Selection** Amount: MYR5000.00

Type: newbiz Expected close: 2007/10/31

Manager: [salesmanager@lookafter.com](#) Sales stage: **Prospecting**

Sales: [salesperson@lookafter.com](#) Probability: 85%

Description: Customer would like to order a few machine for packaging purposes

[Journal](#) | [Quotation](#) | [Biz Process Flow](#) | [Close Sales](#)

Figure 4.8

Journal [+ ^newpost:](#) Click here to add journal to this opportunity Prev | Next Total: 1-0/ 0

Click on NewPost and you will see (figure 4.9):

Journal + ^newpost: Prev | Next Total: 1-0/ 0

Account name: Andrew & Sons Trading

*^body: Please follow up the customer status

^empriority: ^high: Select the priority for this Opportunity

Followup: Select the action need to take

^phonecalled:

Visited:

Email:

Quotation: MYR|5000| You may enter the quotation price here if there is any changes

Enter any message here

Click here to submit the journal entry ^submitnow:

Figure 4.9

Journal can act as a space to capture the conversation between a salesperson and a sales/resource manager.

Journal [+ ^newpost:](#) Prev | Next Total: 1-1/ 1

2007/10/10 14:49:12

Sales Report By: [salesperson@lookafter.com](#) [+REPLY](#) Click here to reply the message

Followup Yes

Quotation MYR5000.00

Please follow up the customer status

Figure 4.10



The journal entry will be displayed at the bottom of the page (figure 4.10)

Issue Quotation:

click here to go to the quotation page



No record found
Figure 4.11

This (figure 4.11) is located at the bottom page of the opportunity's details. Select the opportunity to issue a new quotation to customer.



Figure 4.12

Select a quotation template to create the quotation.

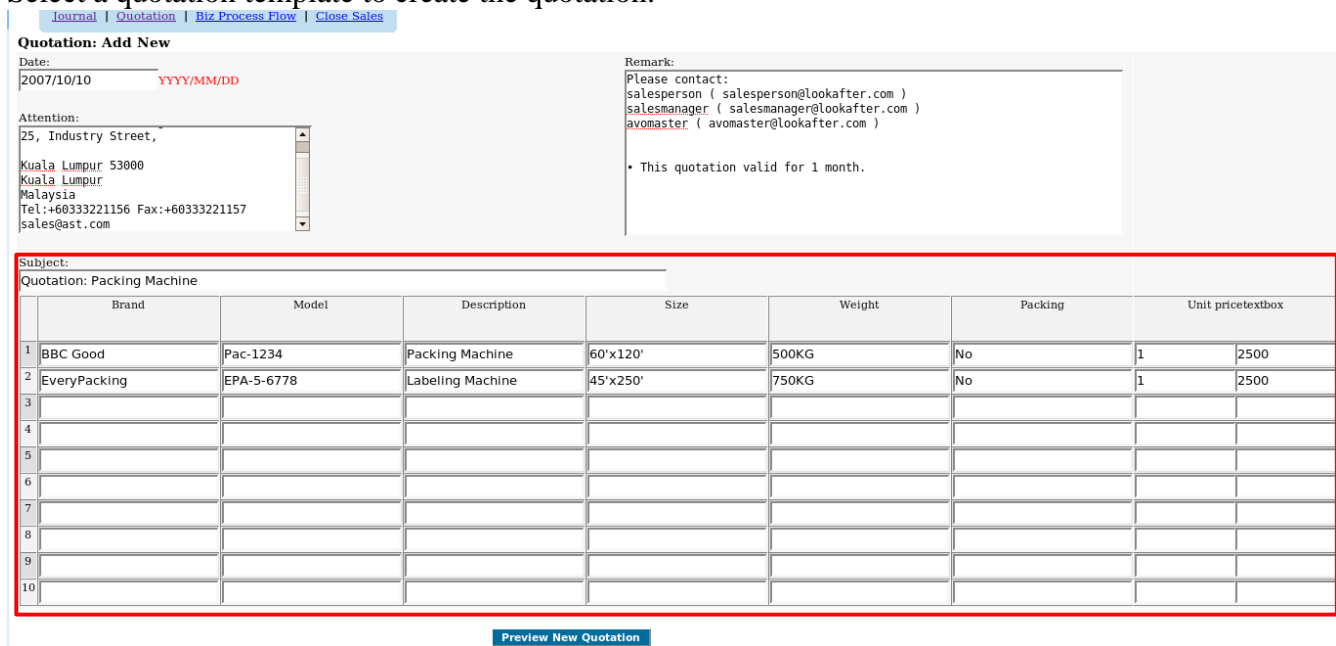


Figure 4.13

Date, Attention and Remark fields are auto generated (The system will grab the relevant information from customer details). You may amend the details as desired.

Once finished entering the data, click on **Preview New Quotation** to preview the Quotation (figure 4.14).

Preview of Quotation:

Quotation: **New (Preview)**

[Go back to edit](#)

Note: This is a preview of the quotation. [Confirm?](#)

LookAfter.com
 Plaza LookAfter.com, Jalan Look After
 123456, Town, State

Oct 10,2007

Andrew & Sons Trading
 25, Industry Street,

Kuala Lumpur 53000
 Kuala Lumpur
 Malaysia
 Tel:+60333221156 Fax:+60333221157
 sales@ast.com

Quotation: Packing Machine

Brand	Model	Description	Size	Weight	Packing	Unit price	textbox	textarea	textbox	textbox	textbox	textbox	Unit price (MYR)
1 BBC Good	Pac-1234	Packing Machine	60'x120'	500KG	No	12500							
2 EveryPacking	EPA-5-6778	Labeling Machine	45'x250'	750KG	No	12500							

Please contact:
 salesperson (salesperson@lookafter.com)
 salesmanager (salesmanager@lookafter.com)
 avomaster (avomaster@lookafter.com)

- This quotation valid for 1 month.

Computer generated document, no signatures needed.

[Confirmed Update](#)

Figure 4.14

Click **Confirmed Update** to save the changes made to the quotation.

[Journal](#) | [Quotation \(1\)](#) | [Biz Process Flow](#) | [Close Sales](#)

Quotation | [New Quotation](#)

Date	Ref. number	Subject	Stage
2007/10/10	100015 Updated!	Quotation: Packing Machine Updated!	Draft

Figure 4.15

Draft Quotation is created!



Confirmed a Quotation:

Once customer confirmed the quotation, you may set the quotation stage to **Confirmed**.

Home Accounts Leads Opportunities Quotation Calendar Reports

Welcome: salesperson@lookafter.com 2007/10/10

Quotation: Listing

Quotation Stage: All

Quotation Ref. no. Filter

Show 10 records per page Total: 1 -1/1

No.	Date	Ref.	Subject	Stage	Opportunities	Account
1	2007/10/10	100015	Quotation: Packing Machine	draft	Sales of Packaging Machine	Andrew & Sons Trading

Total: 1-1/1

Figure 4.16

Quotation: Edit

Stage: Draft

Date: 2007/10/10

Attention: Andrew & Sons Trading, 25, Industry Street, Kuala Lumpur 53000, Malaysia. Tel: +60333221156 Fax: +60333221157

Subject: Quotation: Packing Machine

Ref. number: 100015

Remark: Please contact: salesperson (salesperson@lookafter.com), salesmanager (salesmanager@lookafter.com), avomaster (avomaster@lookafter.com). This quotation valid for 1 month.

	Brand	Model	Description	Size	Weight	Packing
1	BBC Good	Pac-1234	Packing Machine	60	500KG	No
2	EveryPacking	EPA-5-6778	Labeling Machine	45	750KG	No

Figure 4.17

Note: To define quotation stage, please refer back to Chapter 2 (figure 2.7).

When quotation status set to **Confirmed**, you will found a banner appear on the top of the quotation page (figure 4.24).



Andrew & Sons Trading
 25, Industry Street,
 Kuala Lumpur 53000
 Kuala Lumpur
 Malaysia
 Tel:+60333221156 Fax:+60333221157
 sales@ast.com

Quotation: Packing Machine

	Brand	Model	Description	Size	Weight	Packing	Unit	Price
1	BBC Good	Pac-1234	Packing Machine	60	500KG	No	1	2500
2	EveryPacking	EPA-5-6778	Labeling Machine	45	750KG	No	1	2500

Please contact:
 salesperson (salesperson@lookafter.com)
 salesmanager (salesmanager@lookafter.com)
 avomaster (avomaster@lookafter.com)

• This quotation valid for 1 month.

Figure 4.18

*Note: Once the quotation stage changed to **Confirmed**, it is not editable.*

- Back** Allow you to go back to Quotation listing page
- Send** Fill the recipient(s)' email address(es) to send the quotation (Figure 4.19).
- Printable Format** To print the quotation.
- Edit** Edit the content of the Quotation. A **Confirmed** quotation can not be edited.
- Duplicate this as new quotation** Duplicate this quotation if need to make changes to the confirmed quotation.

Table 4.1

To send a quotation

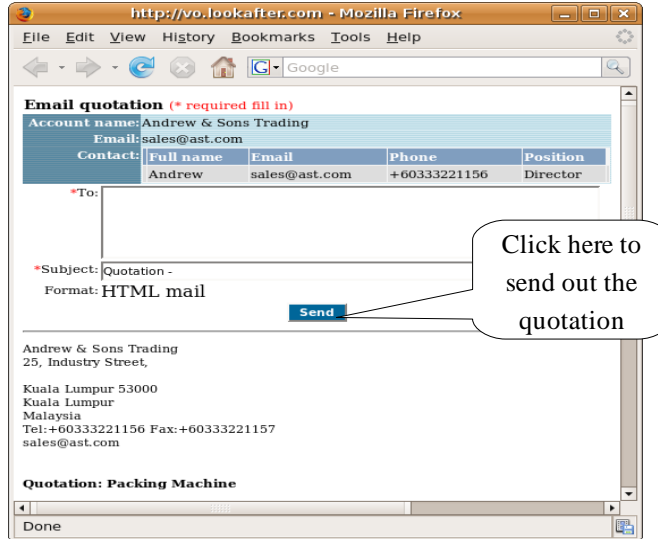


Figure 4.19

Search a Quotation

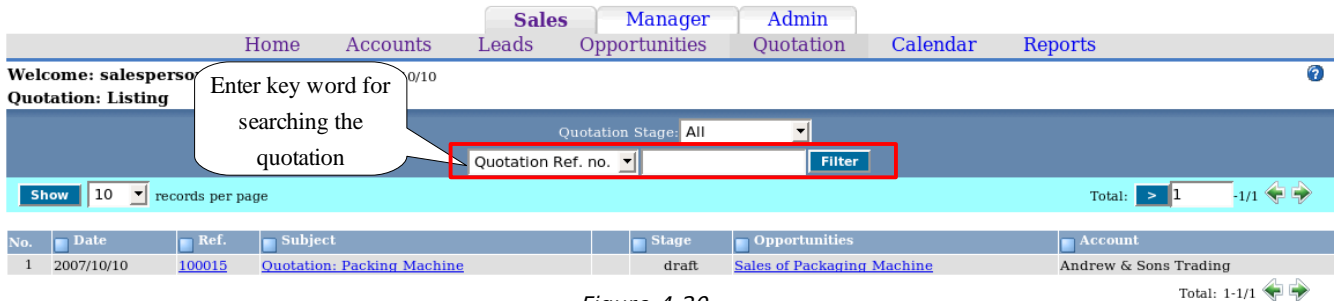


Figure 4.20

Search for the particular quotation (figure 4.20)

Close A Sales:

Opportunities: Detail [Event Calendar](#) | [Biz Process Flow](#)

Account Information

Account name	Andrew & Sons Trading A-123456	Website	www.ast.com
Open opportunities	1	Email	sales@ast.com
Address	25, Industry Street, Kuala Lumpur 53000 Kuala Lumpur Malaysia	Phone	+60333221156
Contact	Full name: Andrew Email: sales@ast.com Phone: +60333221156 Position: Director	Fax	+60333221157

Opportunity Information

Opportunity name	Sales of Packaging Machine My Selection	Amount	MYR5000.00
Type	newbiz	Expected close	2007/10/31
Manager	salesmanager@lookafter.com	Sales stage	Prospecting
Sales	salesperson@lookafter.com	Probability	85%
Description	Customer would like to order a few ma		

[Journal](#) | [Quotation \(1\)](#) | [Biz Process Flow](#) | **Close Sales**

Figure 4.21

Opportunities: Close Sales [Back to opportunity detail](#)

Opportunity Information

*Account name	Andrew & Sons Trading	Amount	MYR5000.00
Opportunity name	Sales of Packaging Machine	Close date	Today 2007/10/10
Close date	Today 2007/10/10	Close date	Today 2007/10/10
Preset	2007/10/31		

Close Won Close Lost

Close Sales

Figure 4.22

Click on **Close Sales** for closing a completed sales.

Note: The system will prompt you to create a flow now. This will discuss later in figure 4.27 & 4.28

Opportunity closed won!

[Do you want to create a business process flow?](#)

Figure 4.23

Home Accounts **Sales** Manager Admin Leads Opportunities Quotation Calendar Reports

Opportunities listing

Opportunity closed won!
[Do you want to create a business process flow?](#)

Opportunities: Detail Updated! [Event Calendar](#) | [Biz Process Flow](#)

Account Information				
Account name	Andrew & Sons Trading A-123456		Website	www.ast.com
Open opportunities	0		Email	sales@ast.com
Address	25, Industry Street, Kuala Lumpur 53000 Kuala Lumpur Malaysia		Phone	+60333221156
			Fax	+60333221157
Contact				
Full name	Email	Phone	Position	
Andrew	sales@ast.com	+60333221156	Director	
Opportunity Information				
Opportunity name	Sales of Packaging Machine			
Type	newbiz			
Manager	salesmanager@lookafter.com			
Sales	salesperson@lookafter.com			
Description	Customer would like to order a few machine for packaging purposes			
Amount	MYR5000.00			
Expected close	2007/10/31			
Sales stage	Close Won			
Probability	100%			

[Journal](#) | [Quotation \(1\)](#) | [Biz Process Flow](#) | [Close Sales](#)

Figure 4.24

When a sales is closed on the opportunity page, you will see a page similar as above (figure 4.24).

Welcome: salesperson@lookafter.com 2007/10/10

Information		My Selected Opportunities									
^ customer: 1		You have not selected any opportunity! You may pick opportunities as your own selection to list here.									
Number of leads: 3		My Top Opportunities									
Number of opportunities: 1		No top opportunity available! You must have existing parent account to create opportunities under it.									
OCTOBER 2007		Leads: New									
Sun	Mon	Tue	Wed	Thu	Fri	Sat	No.	Account	Email	Phone	Created
1	2	3	4	5	6		1	Benjamin Foods	marketing@benfoods.com	+60386861212	2007/10/9
7	8	9	10	11	12	13	2	Muthu Nasi Kandar	info@mnasikandar.com	+6042353535	2007/10/9
14	15	16	17	18	19	20	3	Zainal SDN BHD	zainal@zainalsb.com	+6072356444	2007/10/9
21	22	23	24	25	26	27					
28	29	30	31								

Sales status: Oct 2007

Progressing: MYR0.00
 Close Won: MYR5000.00
 Close Lost: MYR0.00

Close won amount added

Opportunity list removed (since there is no other opportunity)

Figure 4.25

Home Accounts Leads Opportunities Quotation Calendar Reports

Account listing | New account

Welcome: salesperson@lookafter.com 2007/10/10 Account: Listing

New info Unread Keyword Filter

Show 10 records per page Total: 1 -1/1

No.	Account	Website	Email	Phone	Fax	^crdate:
1	Andrew & Sons Trading	www.ast.com	sales@ast.com	+60333221156	+60333221157	2007/10/9

Figure 4.26

Total: 1-1/1

This particular Leads will move into Accounts (Customer) automatically after the sales is closed (figure 4.26).

Create Biz Process Flow (Link to Workflow):

After an opportunity is closed, the system will prompt the Salesperson to create a WorkFlow.

Opportunities listing

Opportunities: Detail [Event Calendar](#) | [Biz Process Flow](#)

Account Information		Website: www.ast.com	
Account name: Andrew & Sons Trading A-123456		Email: sales@ast.com	
Open opportunities: 1		Phone: +60333221156	
Address: 25, Industry Street,		Fax: +60333221157	
Kuala Lumpur 53000			
Kuala Lumpur			
Malaysia			
Contact			
Full name	Email	Phone	Position
Andrew	sales@ast.com	+60333221156	Director
Opportunity Information			
Opportunity name: Sales of Packaging Machine My Selection		Amount: MYR5000.00	
Type: newbiz		Expected close: 2007/10/31	
Manager: salesmanager@lookafter.com		Sales stage: Prospecting	
Sales: salesperson@lookafter.com		Probability: 85%	
Description: Customer would like to order a few machine for packaging purposes			

[Journal](#) | [Quotation \(1\)](#) | [Biz Process Flow](#)

Biz Process Flow **New Flow**

Status: Active Filter

Click here to create business flow (workflow)

Or, click here to create a new flow

User filtering option to search for all available flow

Note: Workflow should be created after an opportunity is closed

Not Available!
Figure 4.27

Work-flow Management

Alert!
External module: **Sales Management**
An external module is now interacting with this module to creating a new work-flow. This alert banner will disappear only after you've created the new work-flow. Click the "Discard" button only if you wish NOT to interact with the external module.

[Template listing](#) [Discard](#)

Welcome: salesperson@lookafter.com
Today is: 2007/10/10

Work-flow: New Flow [Create New Flow](#)

Subject	Description
1. gadadsds	adsadsa
2. Amerian Company	sdjlnfdkjkjhj
3. Sales proposal flow	dgffds dshjf jds fljd sf dsf ds fsdj fids fj dsfhj ds ds fds fds
4. Template	shdkjsadhksjahd
5. Web Design - Domain Name	Web Design Template
6. Testing	
7. Phone & email support	The flow for supporting customer on a phone call or sent in email.
8. Make a cup of coffee	To guide user how to make a cup of coffee

Done

Figure 4.28

Click on **New Flow** allows you to select a template to create a flow (figure 4.28). To learn more on Virtual Office Workflow, please refer to Virtual Office Workflow manual.

Note: Virtual Office Workflow help a salesperson on completing a sales process by following company standard procedures .

Chapter 5: Sales Report

Allowing salesperson and manager to have a summary report for daily, monthly and yearly closed sales, forecast sales and activities report.

Monthly Closed Sales Report

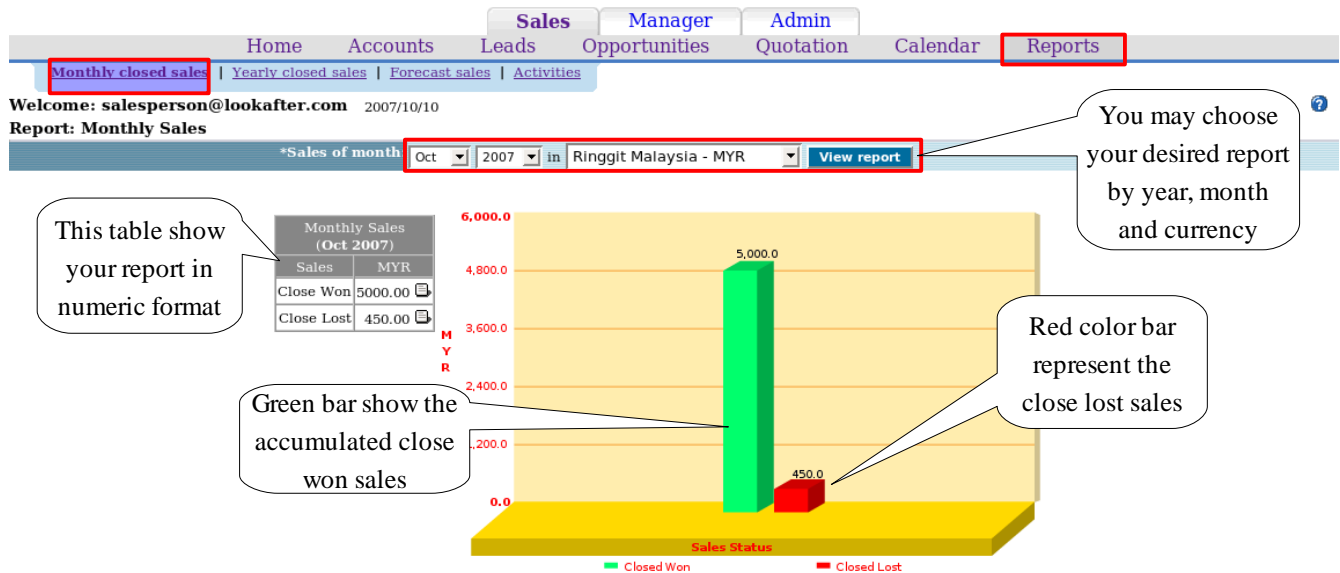


Figure 5.1

Go to Virtual Office > BizApp > Sales Management > Sales/Manager > Reports > Monthly Closed Sales

The report will have both Bar chart and table format.

axis X (horizontal) Represent Close Won and Close Lost Sales

axis Y (Vertical) Represent the amount of Close Won and Close Lost Sales

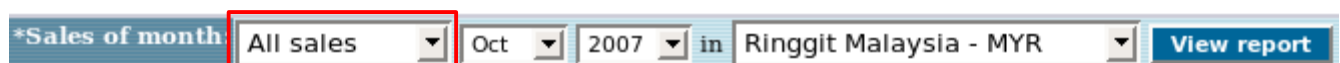


Figure 5.1a

*Note: Figure 5.1a is the option bar under Manager **Monthly** report page.*

Manager to view all or each individual salesperson's report

Salesperson to view own report only

Yearly Closed Sales Report

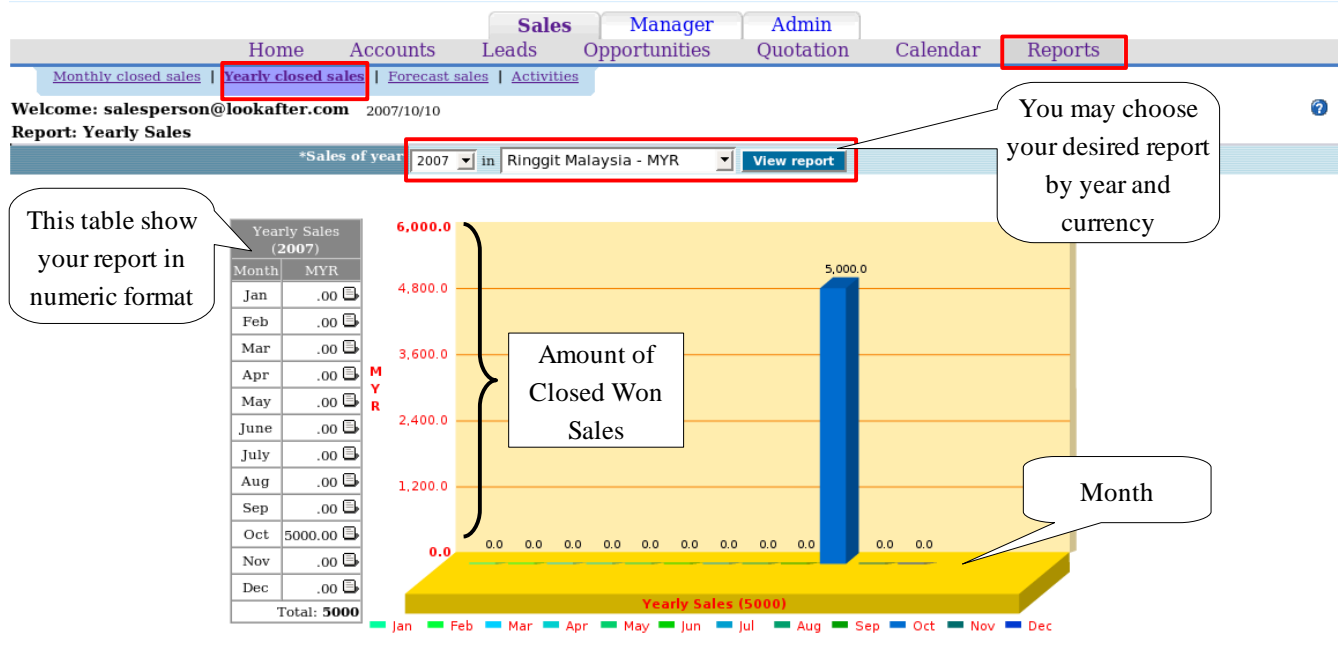


Figure 5.2

Go to Virtual Office > BizApp > Sales Management > Sales/Manager > Reports > Yearly Closed Sales
 The report has both Bar Chart and table format.

axis X (horizontal) Represent Month

axis Y (Vertical) Represent the amount of Close Won and Close Lost Sales



Figure 5.2a

Note: Figure 5.2a is the option bar under Manager Yearly report page.

Manager to view all or each individual salesperson report

Salesperson to view own report only

This is a consolidated report based on each salesperson's achievement of each particular opportunity and actual sales generated

Forecast Sales Report

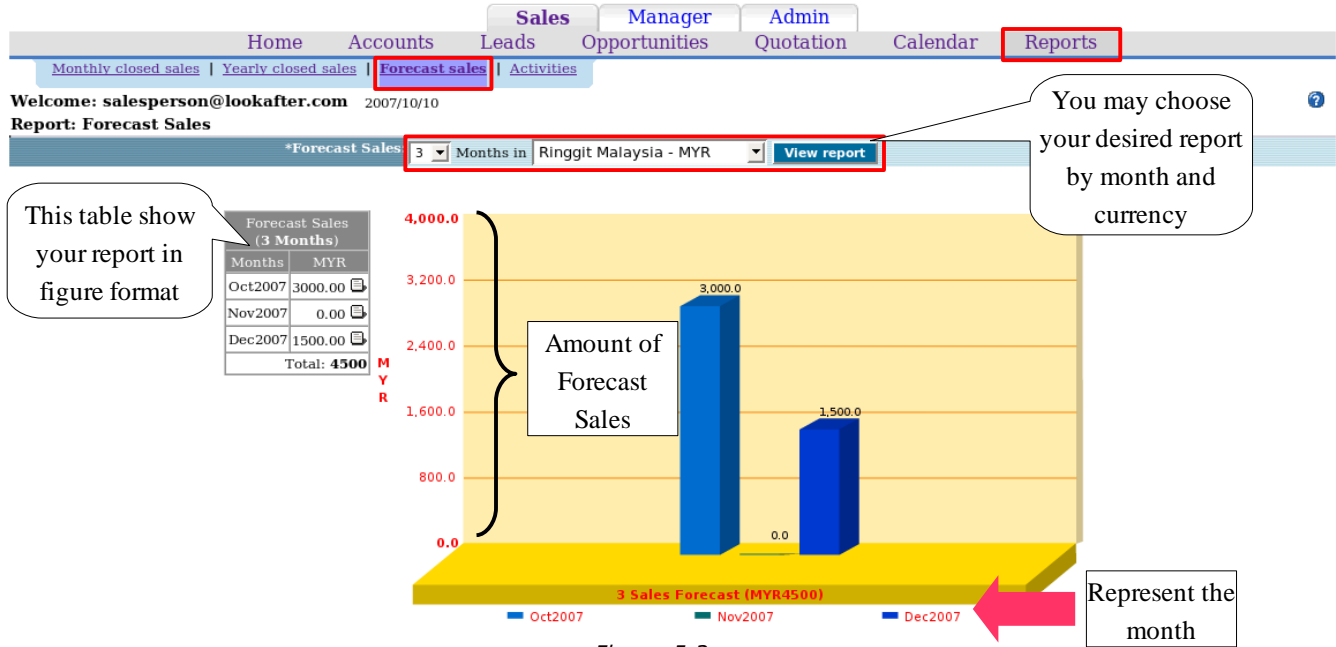


Figure 5.3

Go to Virtual Office > BizApp > Sales Management > Sales/Manager > Reports > Forecast Sales
The report has both Bar Chart and table format.

axis X (horizontal) Represent Month

axis Y (Vertical) Represent the amount of ForecastSales

Activities Report

Home Accounts Leads **Sales** Manager Admin Opportunities Quotation Calendar **Reports**

Monthly closed sales | Yearly closed sales | Forecast sales | **Activities**

Welcome: salesperson@lookafter.com 2007/10/10
Report: Sales Activities

Date of activities: 10 October 2007 in Ringgit Malaysia - MYR **View Report**

Date	Account	Sales	Remark	Action	Quotation	Sales closed	
1 2007/10/10 14:49:12	Andrew & Sons Trading	salesperson@lookafter.com	Please follow up the customer status	Follow up	MYR5000.00	MYR.00	
2 2007/10/10 16:18:15	Andrew & Sons Trading	salesperson@lookafter.com	Close sales: Close Won Amount: MYR5000.00 Date: 2007/10/31 By: salesperson@lookafter.com Position: Sales person	-	MYR.00	MYR5000.00	
3 2007/10/10 18:3:12	Benjamin Foods	salesperson@lookafter.com	customer has been follow up. customer would like to consider before purchase	Follow up Phone called Visited	MYR1500.00	MYR.00	
4 2007/10/10 18:6:40	Benjamin Foods	salesperson@lookafter.com	Close sales: Close Lost Amount: MYR1500.00 Date: 2007/11/09 By: salesperson@lookafter.com Position: Sales person	-	MYR.00	MYR1500.00	
5 2007/10/10 18:17:9	Muthu Nasi Kandar	salesperson@lookafter.com	Close sales: Close Lost Amount: MYR450.00 Date: 2007/10/12 By: salesperson@lookafter.com Position: Sales person	-	MYR.00	MYR450.00	
Total:				2	1	1	0 MYR6500.00 MYR6950.00

[Printable format](#)

Figure 5.4

Activity report consist of all the activities/journal entries within the search scope.

Sales Management addresses all phases in a sales process: from building the prospect details to the order, and completion of the delivery.