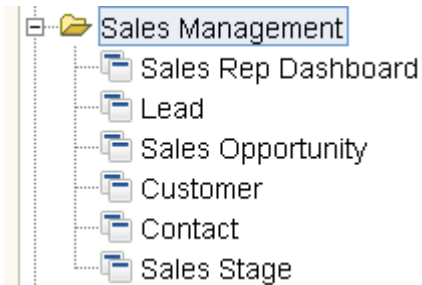
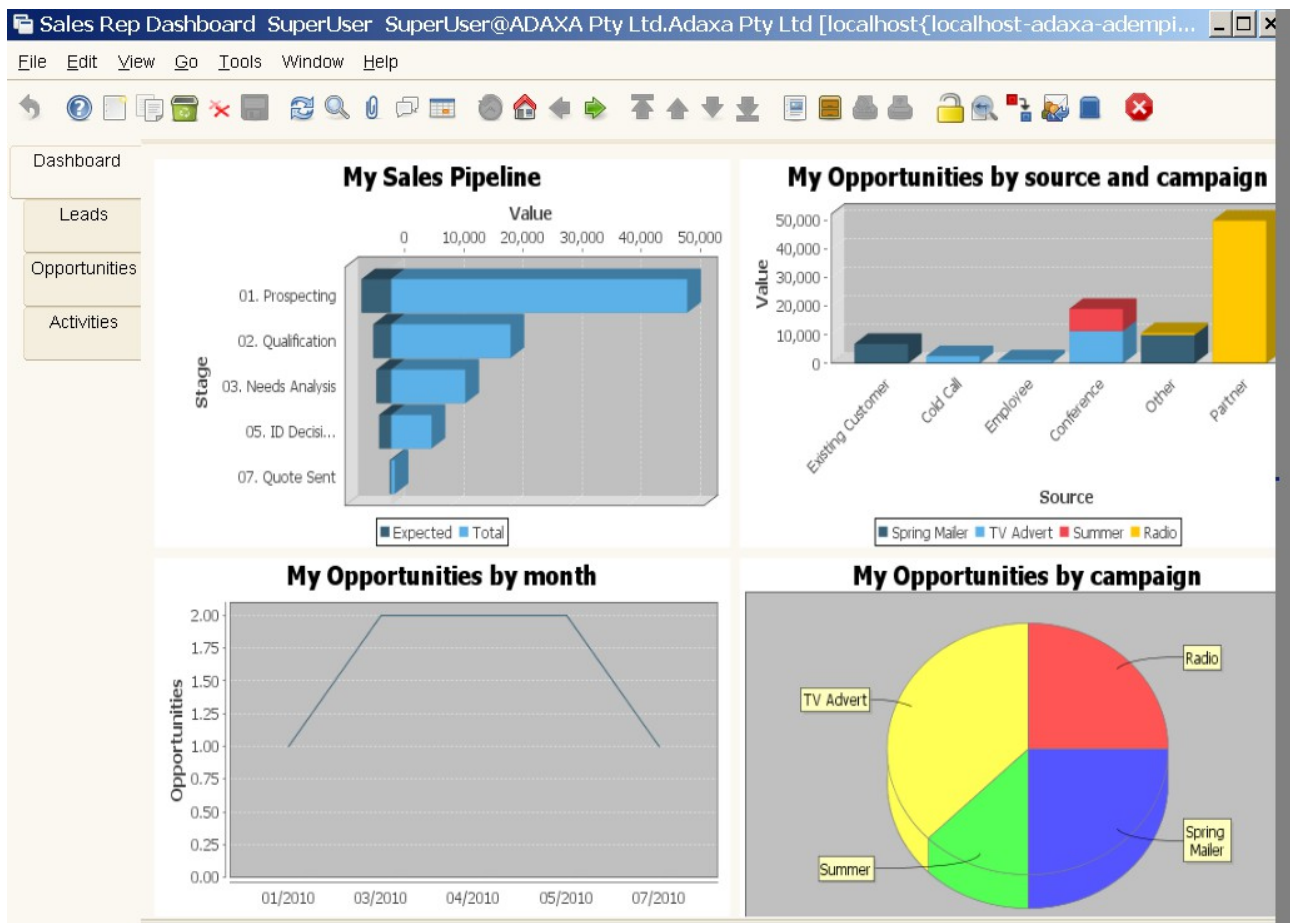


# Functionality added by Adaxa for Sales management

## The Menu Items Added for Sales Management

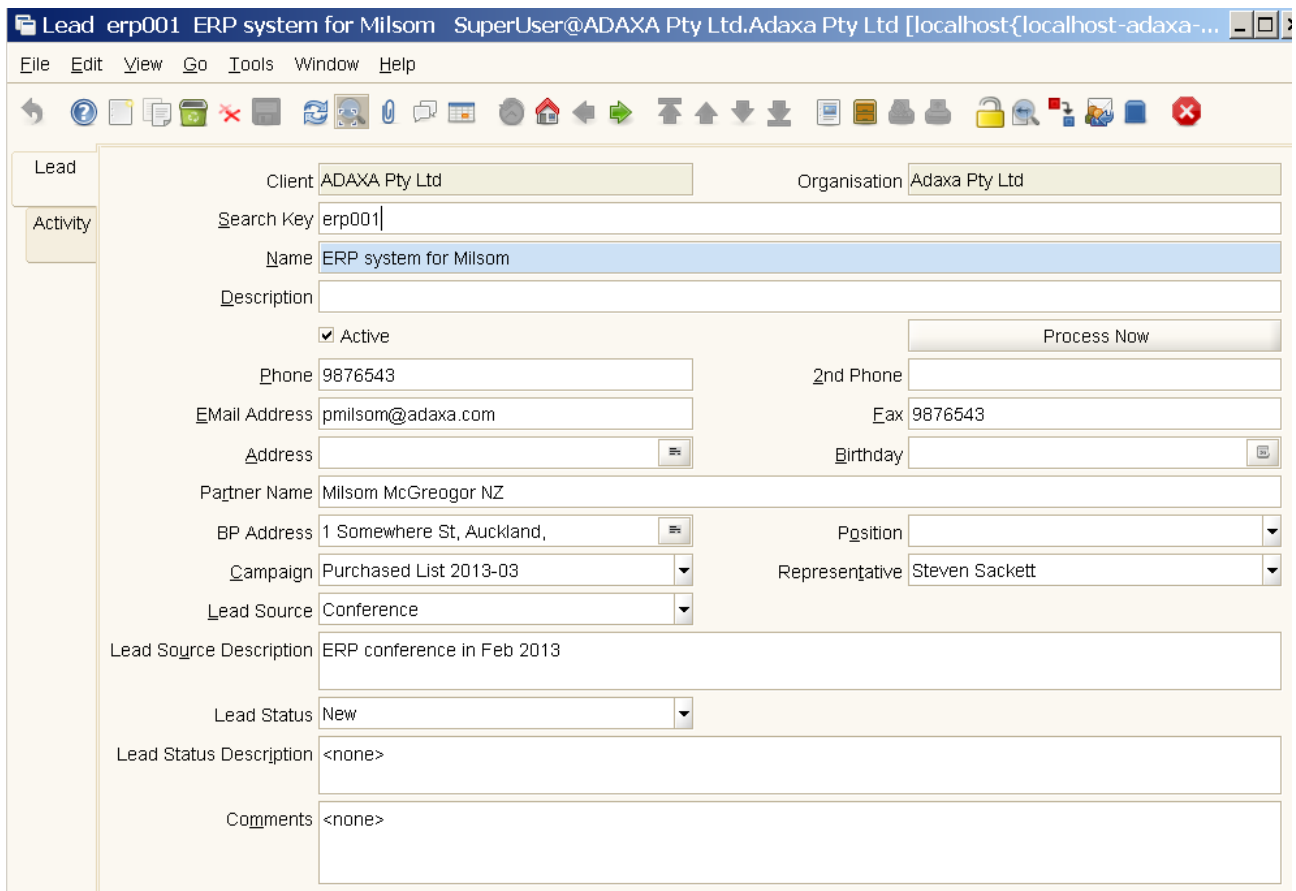


## Sales Rep Dashboard Window



The Leads, Opportunities and Activities are a summarisation of records either entered here or in the other windows shown below.

## The Lead Window



Lead erp001 ERP system for Milsom SuperUser@ADAXA Pty Ltd.Adaxa Pty Ltd [localhost{localhost-adaxa-...]

File Edit View Go Tools Window Help

Lead

Activity

Client ADAXA Pty Ltd Organisation Adaxa Pty Ltd

Search Key erp001

Name ERP system for Milsom

Description

Active Process Now

Phone 9876543 2nd Phone

Email Address pmilsom@adaxa.com Fax 9876543

Address Birthday

Partner Name Milsom McGreogor NZ

BP Address 1 Somewhere St, Auckland, Position

Campaign Purchased List 2013-03 Representative Steven Sackett

Lead Source Conference

Lead Source Description ERP conference in Feb 2013

Lead Status New

Lead Status Description <none>

Comments <none>

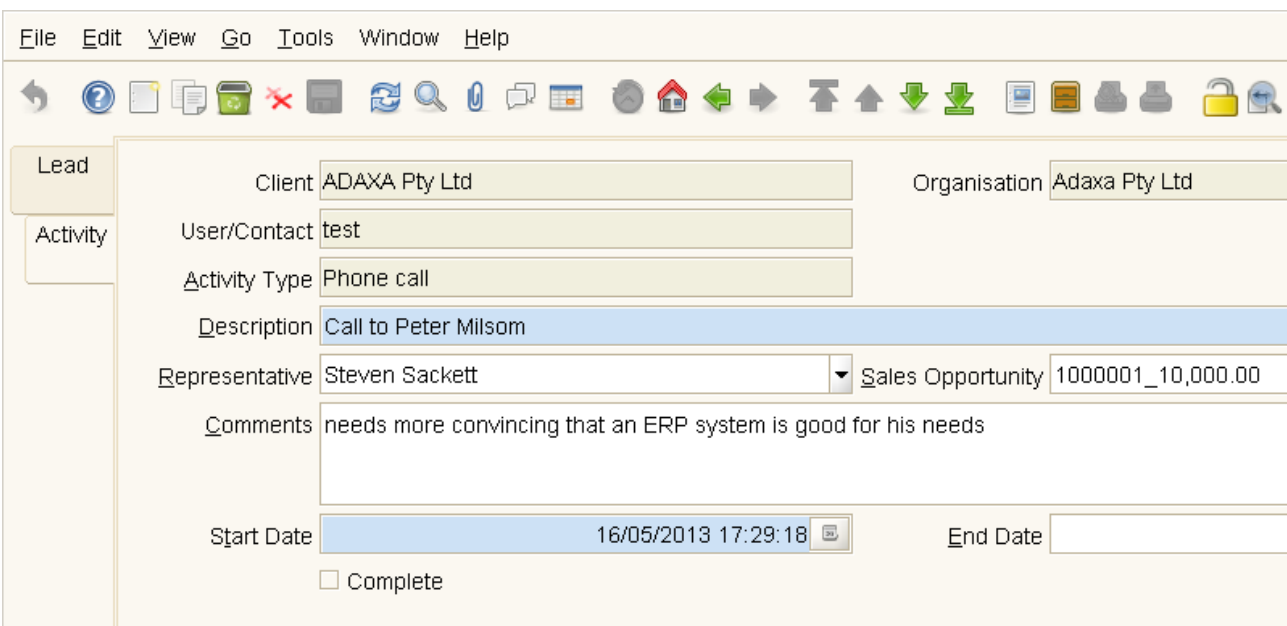
A Lead is an unqualified Opportunity. We are still gathering data here and have not created a Business Partner record etc.

## Activities Associated with this Lead



Lead	Activity Type	Description	Representative	Sales Opportunity
	Phone call	Call to Peter Milsom	Steven Sackett	1000001_10,000.00
Activity	Meeting	Meeting with Fred to discuss MM nee...	Steven Sackett	1000001_10,000.00

## A single Activity record in a Lead



Client: ADAXA Pty Ltd      Organisation: Adaxa Pty Ltd

User/Contact: test

Activity Type: Phone call

Description: Call to Peter Milsom

Representative: Steven Sackett      Sales Opportunity: 1000001\_10,000.00

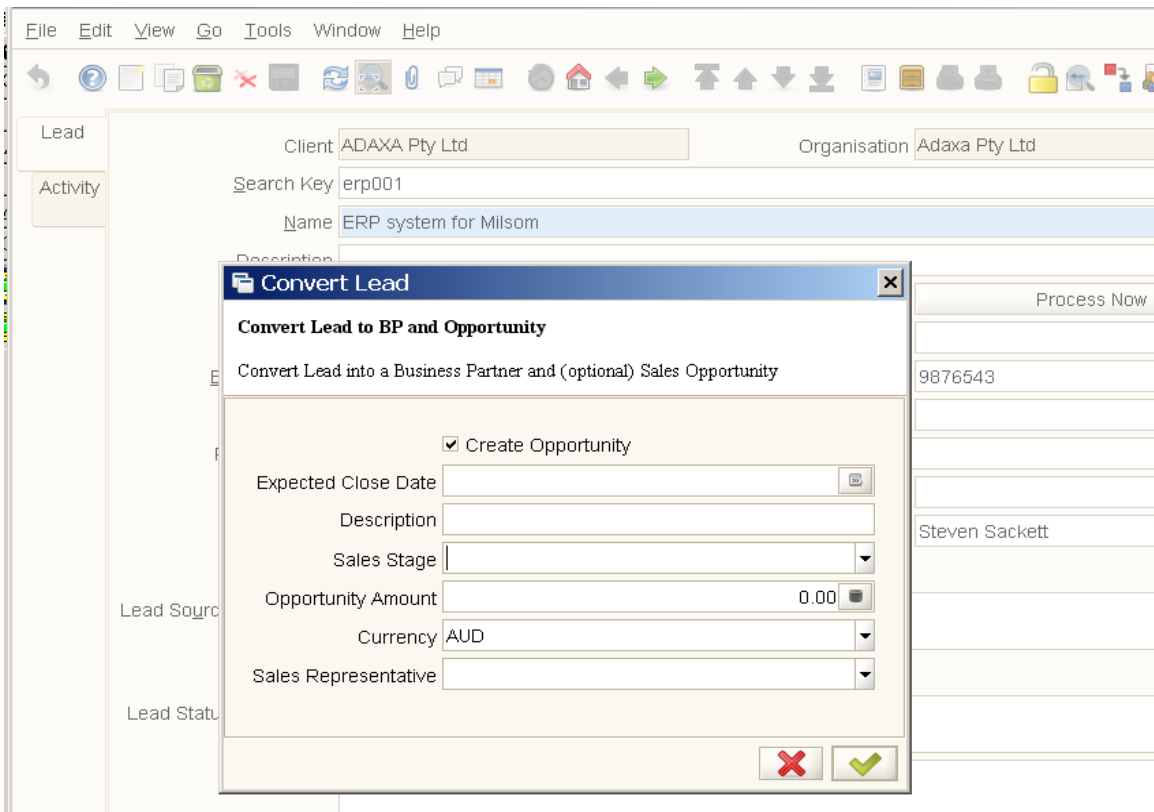
Comments: needs more convincing that an ERP system is good for his needs

Start Date: 16/05/2013 17:29:18      End Date:

Complete

Note: Another option is to use Requests to store Activities (or Leads) so that they can have follow-up times and all the other capabilities that Requests bring. The other side of the argument is that if it is not very simple it won't be used. This was designed to be simple.

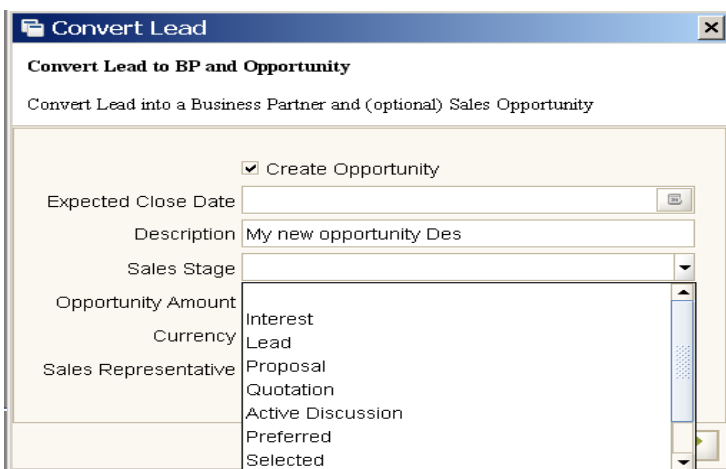
# Conversion of Lead to an Opportunity



When the “Create Opportunity” process is run it will create

- The BP record,
- Contact(s)
- Locations
- Opportunity Record
- inherit ant Activity records

## ***Sales Stage selection when creating Lead***



# The Opportunity Window

Client	ADAXA Pty Ltd	Organisation	*
Document No	1000001		
Business Partner	Milsom McGregor	User/Contact	Peter Milsom
Campaign	Purchased List 2013-03	Representative	Steven Sackett
Sales Stage	Quotation	Probability	15.00
Expected Close Date	04/02/2012	Opportunity Amount	10,000.00
Weighted Amount	1,500.00	Currency	AUD
Description			
Comments			
Order			

The probability % can be hand entered or defaulted from the Sales Stage table... depends what you want.

The order field contains a link to the proposal which is assessed as most likely to succeed or to the final order. If there are multiple quotes or proposals the one listed here is used for reporting.

## Quote(s) can be added under the Opportunity

Sales Opportunity 20001 SuperUser@ADAXA Pty Ltd.Adaxa Pty Ltd [localhost{localhost-adaxa-ade...]

File Edit View Go Tools Window Help

Opportunity Client ADAXA Pty Ltd Organisation Adaxa Pty Ltd

Quote/Order Document No 20001 Order Reference

Description

Order Line Target Document Type Proposal Self-Service

Activity Date Ordered 04/02/2012

Business Partner Milsom McGregor Invoice Partner milsom-Milsom McGregor

Partner Location Newmarket Auckland Invoice Location Newmarket Auckland

User/Contact Peter Milsom Invoice Contact Peter Milsom

Delivery Warehouse HO

Invoicing Price List Sales Price List (AUD) Currency AUD

Representative Steven Sackett Discount Printed

Promotion Code On Credit Payment Term 7 Days

Reference

## Lines are added to the Quote in usual way

File Edit View Go Tools Window Help

Opportunity	Order	Line No	Product	Charge	Ordered Quantity	Del
	20001_02/04/2012	10	Quick Start_Quick Start Package		1	
Quote/Order	20001_02/04/2012	20	ProjMgt_Project Management Services		100	

Order Line

Activity

Quote Document is then produced (not shown here – standard ADempiere functionality)

## Further Activities Entered under the Opportunity as Required

File Edit View Go Tools Window Help

Opportunity	Client	ADAXA Pty Ltd	Organisation	Adaxa Pty Ltd
Quote/Order	Sales Opportunity	1000001_10,000.00		
Order Line	Activity Type	Phone call		
Activity	Description	Call to Peter Milsom		
	User/Contact	ERP system for Milsom	Representative	Steven Sackett
	Comments	needs more convincing that an ERP system is good for his needs		
	Start Date	16/05/2013 17:29:18	End Date	
	<input type="checkbox"/> Complete			

## Choices in a new Activity

Lead erp001 ERP system for Milsom SuperUser@ADAXA Pty Ltd.Ad

File Edit View Go Tools Window Help


Lead	Client	ADAXA Pty Ltd	Orga
Activity	User/Contact	test	
	Activity Type		
	Description	Email	
	Representative	Meeting	
	Comments	Phone call	Sales Opp
		Task	
	Start Date	16/05/2013 17:38:04	E
	<input type="checkbox"/> Complete		

# The Customer Window

## Grid view

Customer milsom Milsom McGregor SuperUser@ADAXA Pty Ltd.Adaxa Pty Ltd [localhost:localhost]

File Edit View Go Tools Window Help



Customer	Active	Credit Status	Open Balance	ACN/ABN	ASIC Code	Business Partner
Australia Pty Ltd	<input checked="" type="checkbox"/>	No Credit Ch...	0.00			Customer
Opportunities less Pty Ltd	<input type="checkbox"/>	No Credit Ch...	0.00			Customer
Treatment Solutions	<input checked="" type="checkbox"/>	Credit OK	-247.50			Customer
Contacts	<input type="checkbox"/>	Credit OK	0.00			Customer
Management Group	<input type="checkbox"/>	Credit OK				Customer
Activities Management Services Pt...	<input type="checkbox"/>	Credit OK	0.00			Customer
Locations n - PQ Lifestyles Pty Ltd	<input checked="" type="checkbox"/>	Credit OK	0.00			Customer
Ltd	<input checked="" type="checkbox"/>	Credit OK	0.00			Customer
Contract Holdings Pty Ltd	<input checked="" type="checkbox"/>	Credit OK	34,262.25			Vendors
Prices Ltd	<input type="checkbox"/>	Credit OK	0.00			Customer
Requests erprises Inc	<input checked="" type="checkbox"/>	Credit OK	0.00			Vendors
Orders	<input checked="" type="checkbox"/>	Credit OK	0.00			Vendors
Australia Pty Ltd (now...	<input checked="" type="checkbox"/>	Credit OK	0.00			Customer
or	<input checked="" type="checkbox"/>	Credit OK	52,088.27			Vendors
ected NZ debts at Bala...	<input checked="" type="checkbox"/>	Credit OK	0.00			Milsom Custome
n Fellowship	<input type="checkbox"/>	Credit OK	0.00			Customer
	<input type="checkbox"/>	Credit OK	0.00			Customer
td	<input checked="" type="checkbox"/>	Credit OK	0.00			Customer
Systems Ltd	<input checked="" type="checkbox"/>	Credit OK	0.00			Customer

The displayed Customers would be optionally filtered to only those who belong to the Sales Rep. Information in all other tabs would be similarly filtered.



**Form View (this is just the usual BP information in a reorganised window)**

Customer milsom Milsom McGregor SuperUser@ADAXA Pty Ltd.Adaxa Pty Ltd [localhost-localhost-adaxa-ad...]

File Edit View Go Tools Window Help

Customer Client ADAXA Pty Ltd Organisation \*

Opportunities Search Key milsom

Contacts Name Milsom McGregor Name 2

Activities Description ABN 119 651 67028

Locations  Active  Customer

Contract Prices Credit Status Credit OK Open Balance 52,088.27

Requests Credit Limit 0.00 Credit Used 0.00

Orders Tax ID Tax Group

SO Tax exempt  PO Tax exempt

ACN/ABN Reference No

ASJC Code Rating

Business Partner Group Vendors Language English (Australia)

Representative

URL

Prospect

Potential Life Time Value 0.00 Actual Life Time Value 1,292.50

Acquisition Cost 0.00 Employees 0

Share 0 Sales Volume in 1,000 0

First Sale 03/02/2009

Price List Sales Price List (AUD) Discount Schema

**Opportunities for this Customer**

Customer 1000001 milsom Milsom McGregor SuperUser@ADAXA Pty Ltd.Adaxa Pty Ltd [localhost-localhost-adaxa-ad...]

File Edit View Go Tools Window Help

Customer	Document No	User/Contact	Campaign	Representative	Sales Stage	Expected Close	Opportunity Amount
	1000001	Peter Milsom	Purchased List 2013-03	Steven Sackett	Quotation	04/02/2012	10,000.00

Opportunities

Contacts

## Contacts of this Customer

Customer 1000001 milsom Peter Milsom SuperUser@ADAXA Pty Ltd.Adaxa Pty Ltd [localh

File Edit View Go Tools Window Help

Customer	Business Partner	Name	Active	Email Address	Partner Location	Phone
Milsom McGregor	Peter Milsom	<input checked="" type="checkbox"/>	pmilsom@adaxa.com	Newmarket Auckland	9876543	

Opportunities

Contacts

## Activities happening with this Customer

Customer 1000001 milsom Milsom McGregor SuperUser@ADAXA Pty Ltd.Adaxa Pty Ltd [localh

File Edit View Go Tools Window Help

Customer

Client ADAXA Pty Ltd Organisation Adaxa Pty Ltd

Opportunities Representative

Contacts Activity Type Email

Activities Description send email to request meeting

User/Contact Peter Milsom Sales Opportunity 1000001\_10,000.00

Locations Comments need to apply some pressure...

Contract Prices Start Date 16/05/2013 17:57:38 End Date

Requests  Complete

Orders

## Requests re this Customer

Customer milsom Newmarket Auckland SuperUser@ADAXA Pty Ltd.Adaxa Pty Ltd [localhost{localhost...]

File Edit View Go Tools Window Help

Client ADAXA Pty Ltd Organisation Adaxa Pty Ltd

Request Type Enhancement Request Document No

Group Category cat 1

Status Resolution

Priority Medium User Importance Medium

Representative Steven Sackett

Summary need to do some work here!

Date last action

Last Result

Due type Due Date next action 17/05/2013 0:00:00

## Orders from This Customer

Customer 10000001 milsom Milsom McGregor SuperUser@ADAXA Pty Ltd.Adaxa Pty Ltd [localhost{loc...]

File Edit View Go Tools Window Help

Order	Date Promised	Product	Ordered Quantity	Price	Qty to deliver
20001_02/04/2012	16/05/2013	ProjMgt_Project Management Services	100	170.00	100
20001_02/04/2012	16/05/2013	Quick Start_Quick Start Package	1	5,000.00	1

# The Contact Window

(standard ADempiere information)

The screenshot shows the 'Contact' window for Peter Milsom. The window title is 'Contact: Peter Milsom SuperUser@ADAXA Pty Ltd. Adaxa Pty Ltd [localhost{localhost-adaxa-...}]. The menu bar includes File, Edit, View, Go, Tools, Window, and Help. The toolbar contains various icons for navigation and actions. The main form is divided into two tabs: 'Contact' and 'Activity'. The 'Contact' tab is active, showing the following fields:

Client	ADAXA Pty Ltd	Organisation	*
Name	Peter Milsom		
Description			
Comments			
<input checked="" type="checkbox"/> Active			
Email Address	pmilsom@adaxa.com		
Phone	9876543	2nd Phone	9765438
Fax	9876548		
Title	Manager		
Business Partner	Milsom McGregor	Partner Location	Newmarket Auckland
Position	IT Manager	Birthday	
Last Contact		Last Result	

# Activities for this Contact

The screenshot shows the 'Activities for this Contact' window for Peter Milsom. The window title is 'Contact: Peter Milsom SuperUser@ADAXA Pty Ltd. Adaxa Pty Ltd [localhost{localhost-adaxa-...}]. The menu bar includes File, Edit, View, Go, Tools, Window, and Help. The toolbar contains various icons for navigation and actions. The main form is divided into two tabs: 'Contact' and 'Activity'. The 'Activity' tab is active, showing the following fields:

Client	ADAXA Pty Ltd	Organisation	Adaxa Pty Ltd
User/Contact	Peter Milsom		
Activity Type	Email		
Description	send email to request meeting		
Representative		Sales Opportunity	1000001_10,000.00
Comments	need to apply some pressure...		
Start Date	16/05/2013 17:57:38	End Date	
<input type="checkbox"/> Complete			

# Sales Stages Definition

Sales Stage	Active	Search Key	Name	Probability	Closed Status	Won
<input checked="" type="checkbox"/>	1	Interest	0.00	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	10	Lead	1.00	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	20	Proposal	5.00	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	30	Quotation	15.00	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	40	Active Discussion	35.00	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	50	Preferred	50.00	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	60	Selected	75.00	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	70	Rejected	0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	80	Order Received	100.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Defines the sales stages and the probability of an opportunity at this stage becoming a real order. Used for preparing sales forecasts using normalised percentages.