## Functionality added by Adaxa for Sales management

## The Menu Items Added for Sales Management

Sales Management Sales Rep Dashboard Lead Customer Customer Sales Stage

## 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

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			Pa	rtner Na	ame Mils	om N	/IcGre	ogor N	Z																			
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		Lead S	tatus	Descr <u>i</u> p	tion <no< th=""><th>ne&gt;</th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th></no<>	ne>																						
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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

🖷 Lea	d erp001 ER	P system for Milsom	SuperUser@ADAX/	A Pty Ltd.Adaxa Pty Ltd [loo
<u>F</u> ile <u>E</u>	dit ⊻iew <u>G</u> o	<u>T</u> ools Window <u>H</u> elp		
5	) 📑 🗊 👼	× 🗐 🛯 🔍 🛛 🖓	🖸 🕲 🏠 🔶 🗭	<b>▲ ★ ★</b> 🗵 🗏 🛎 🌢
Lead	Activity Type	Description	Representa	ti∨e Sales Opportunity
	Phone call	Call to Peter Milsom	Steven Sack	kett 1000001_10,000.00
Activit	y Meeting	Meeting with Fred to discu	iss MM nee Steven Sack	kett 1000001_10,000.00

#### A single Activity record in a Lead

<u>F</u> ile	<u>E</u> dit	: ⊻iew <u>G</u> o <u>T</u> oo	Is Window <u>H</u> elp
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Le	ead	Client	ADAXA Pty Ltd Organisation Adaxa Pty Ltd
A	tivity	User/Contact	test
		<u>A</u> ctivity Type	Phone call
		<u>D</u> escription	Call to Peter Milsom
		<u>R</u> epresentati∨e	Steven Sackett Sales Opportunity 1000001_10,000.00
		<u>C</u> omments	needs more convincing that an ERP system is good for his needs
		S <u>t</u> art Date	16/05/2013 17:29:18 🗷 <u>E</u> nd 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.

#### <u>File Edit View Go T</u>ools Window <u>H</u>elp • 0 📑 🕞 🥁 📰 🛯 🖓 💽 🖉 📼 🐞 🔶 🗰 王 全 士 士 🗉 🔳 🛎 👗 🦳 🐂 🐱 Lead Client ADAXA Pty Ltd Organisation Adaxa Pty Ltd Search Key erp001 Activity Name ERP system for Milsom 🖶 Convert Lead × Process Now Convert Lead to BP and Opportunity Convert Lead into a Business Partner and (optional) Sales Opportunity 9876543 Create Opportunity 33 Expected Close Date Description Steven Sackett Sales Stage • Opportunity Amount 0.00 🛢 Lead So<u>u</u>rc Currency AUD • Sales Representative • Lead Statu X 🗸

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

🖶 Convert Lead		×	(							
Convert Lead to BP and	Convert Lead to BP and Opportunity									
Convert Lead into a Busine	Convert Lead into a Business Partner and (optional) Sales Opportunity									
	Create Opportunity									
Expected Close Date		×								
Description	My new opportunity Des									
Sales Stage		-								
Opportunity Amount		-								
Currency	Interest Lead									
Sales Representative	Proposal									
	Quotation									
1	Active Discussion									
	Preferred		1							
	Selected	-	1							

## **Conversion of Lead to an Opportunity**

5	Sales Opp	portunity 1000001	SuperUser@AD	AXA Pty Ltd.	Ada	axa Pty Ltd [loca	lhost{localh	nost-ad	аха-а [	_ 🗆 ×
<u>E</u> ilı	e <u>E</u> dit ⊻i	ew <u>G</u> o <u>T</u> ools Wind	ow <u>H</u> elp							
\$	0		🧟 🛛 🗇 🔳 (	< 💠 🏠	4	<b>▲ ♥ ⊻</b> ■		2	<b>-</b> } 🐼 🛯	
С	pportunity	Client	ADAXA Pty Ltd			Organisation	*			
G	Quote/Order	Document No	1000001							
		<u>B</u> usiness Partner	Milsom McGregor		8	<u>U</u> ser/Contact	Peter Milsom			-
	Order Line	<u>C</u> ampaign	Purchased List 2013	-03	-	<u>R</u> epresentative	Steven Sacket	t		-
	Activity	<u>S</u> ales Stage	Quotation		-	<u>P</u> robability			15.0	0 8
		Expected Close Date		04/02/2012	20	Opportunity Amount			10,000.0	0 8
		Weighted Amount		1,500.	00	Curre <u>n</u> cy	AUD			T
		<u>D</u> escription								
		Co <u>m</u> ments								
		Order			-					
		0.00.								
					_					
Red	cord saved									[ 1/1 ]

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.

## The Opportunity Window

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

🖷 Sales Opp	ortunity 20001 Sup	erUser@ADAXA Pty Ltd.Ada	xa Pty Ltd [localhos	t{localhost-adaxa-ade
<u>F</u> ile <u>E</u> dit ⊻ie	ew <u>G</u> o <u>T</u> ools Window	<u>H</u> elp		
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Opportunity	Client	ADAXA Pty Ltd	Organisation	Adaxa Pty Ltd
Quote/Order	Document No	20001	Order Reference	
Order Line	<u>D</u> escription			
Activity	<u>T</u> arget Document Type	Proposal 👻		Self-Service
	D <u>a</u> te Ordered	04/02/2012 🗷		
	<u>B</u> usiness Partner	Milsom McGregor 🔒	<u>I</u> nvoice Partner	milsom-Milsom McGregor
	Partner <u>L</u> ocation	Newmarket Auckland 🗸	I <u>n</u> voice Location	Newmarket Auckland
	<u>U</u> ser/Contact	Peter Milsom 🔻	Invoi <u>c</u> e Contact	Peter Milsom
	Delivery			
	<u>W</u> arehouse	HO 🗸		
	⊡ Invoicing			
	Price List	Sales Price List (AUD) 🔹	Currency	AUD
	Representative	Steven Sackett 🗸 👻		Discount Printed
		🗟 On Credit	Payment Term	7 Days
	Promotion Code			
	E Deference			

## Lines are added to the Quote in usual way

<u>E</u> ile <u>E</u> dit ⊻i	ew <u>G</u> o <u>T</u> ools Win	dow <u>H</u> elp			
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Opportunity	Order	Line No Product	Charge	Ordered Quantity	Deli
	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

### Choices in a new Activity

🖶 Lead	erp001_ERP sy	stem for Milsom - S	SuperUser@ADAXA Pt	y Ltd.Adi
<u>F</u> ile <u>E</u> di	t ⊻iew <u>G</u> o <u>T</u> oo	s Window <u>H</u> elp		
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Lead	Client	ADAXA Pty Ltd		Orga
Activity	User/Contact	test		
	<u>A</u> cti∨ity Type		-	
	<u>D</u> escription	Email		
	<u>R</u> epresentative	Meeting Phone call		<u>S</u> ales Opp
	<u>C</u> omments	Task		
	S <u>t</u> art Date		16/05/2013 17:38:04 🔳	E
		Complete		

## **The Customer Window**

#### Grid view

Customer	milsom Milsom Mo	Grego	r SuperUser	@ADAXA Pty Ltd.Adax	a Pty Ltd [loc	alhost{localh
<u>F</u> ile <u>E</u> dit ⊻ie	w <u>G</u> o <u>T</u> ools Window	v <u>H</u> elp				
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Customer		Active	Credit Status	Open Balance ACN/ABN	ASIC Code	Business Partne
	istralia Pty Ltd	~	No Credit Ch	0.00		Customer
Opportunities	less Pty Ltd		No Credit Ch	0.00		Customer
	reatment Solutions	~	Credit OK	-247.50		Customer
Contacts			Credit OK	0.00		Customer
	agement Group		Credit OK			Customer
Activities	hagement Services Pt		Credit OK	0.00		Customer
	ו - PQ Lifestyles Pty Ltd	~	Credit OK	0.00		Customer
Locations	Ltd	~	Credit OK	0.00		Customer
	Holdings Pty Ltd	~	Credit OK	34,262.25		Vendors
Contract	Ltd		Credit OK	0.00		Customer
Prices	erprises Inc	~	Credit OK	0.00		Vendors
Requests		✓	Credit OK	0.00		Vendors
	Australia Pty Ltd (now	~	Credit OK	0.00		Customer
Orders	or	~	Credit OK	52,088.27		Vendors
	cted NZ debts at Bala	~	Credit OK	0.00		Milsom Custome
	h Fellowship		Credit OK	0.00		Customer
			Credit OK	0.00		Customer
	.td	•	Credit OK	0.00		Customer
	Svetame I trl		Credit OI/	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)

5	Custon	ne <b>r</b> n	nilson	n Mils	som Me	cGre	gor s	Supe	erUser	@A	DAX.	A Pty	/ Lto	d.Ac	laxa	Pty Lto	d [loo	alho	ost{lo	calh	ost-a	idax	a-ad.	[
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(	Opportuni	ties		5	earch K	ey m	ilsom																	
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	Contact	5			Name	2																		
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					<u>F</u> irst Sa						03/02/	2009												
					Price L	ist S	ales Pr	ice Li	st (AUD	)			-		Dis	count Sc	hema							-

#### **Opportunities for this Customer**



## **Contacts of this Customer**

🖶 Customer	1000001 milso	m Peter Mil	som S	uperUser@ADAXA	Pty Ltd.Adaxa Pty	Ltd [localh
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Customer	Business Partner	Name	Active	EMail Address	Partner Location	Phone
	Milsom McGregor	Peter Milsom	~	pmilsom@adaxa.com	Newmarket Auckland	9876543
Opportunities						
Contacts						

## Activities happening with this Customer

Ę	Customer	1000001 milsom Milsom McGregor SuperUser@ADAXA Pty Ltd.Adaxa Pty Ltd [loc
	<u>F</u> ile <u>E</u> dit ⊻ie	w <u>G</u> o <u>T</u> ools Window <u>H</u> elp
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	Customer	Client ADAXA Pty Ltd Organisation Adaxa Pty Ltd
	Opportunities	Representative
		Activity Type Email
	Contacts	Description send email to request meeting
	Activities	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	

Ę	Customer	milsom Newr	narket .	Auckland	SuperUser	@ADAXA	Pty Ltd.Adax	a Pty Ltd [l	ocalhost{loc	alhost	_ 🗆 ×
E	ile <u>E</u> dit ⊻i	ew <u>G</u> o <u>T</u> ools V	Nindow <u>H</u>	<u>H</u> elp							
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	Customer	Client	ADAXA Pt	.y Ltd			Organisatior	Adaxa Pty Lto	1		•
	Opportunities	<u>R</u> equest Type	Enhancer	ment Reques	it	-	Document No				
	Contonto	<u> </u>				-	<u>C</u> ategory	/ cat 1			-
	Contacts	<u>S</u> tatus				-	R <u>e</u> solutior	1			-
	Activities	<u>P</u> riority	Medium			•	<u>U</u> ser Importance	e Medium			-
	Locations	Represe <u>n</u> tative Su <u>m</u> mary		ackett o some work	here!	-					
	Contract Prices										
	Requests	Date last action				8					
	Orders	Last Result									
	0.0010	Due <u>t</u> ype	Due			T	D <u>a</u> te next actior	1	17/0:	5/2013 0:00	:00 🗷

## **Requests re this Customer**

## Orders from This Customer

🖶 Customer	10000001 milso	om Milsom Me	Gregor SuperUser@ADAXA Pty	y Ltd.Adaxa Pty I	Ltd [locall	nost{loc 🗕
<u>E</u> ile <u>E</u> dit ⊻ie	w <u>G</u> o <u>T</u> ools Win	idow <u>H</u> elp				
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Customer	Order	Date Promised	Product	Ordered Quantity	Price	Qty to deli∨er
	20001_02/04/2012	16/05/2013	ProjMgt_Project Management Services	100	170.00	100
Opportunities	20001_02/04/2012	16/05/2013	Quick Start_Quick Start Package	1	5,000.00	1
Contacts Activities Locations						
Contract Prices Requests						
Orders						

## **The Contact Window**

(standard ADempiere information)

2	🖻 Co	onta	nct Pete <mark>r</mark> M	Milso	m Superl	Jser	@ADAX	A Pty L	td.A	daxa	a Pty	Ltd [l	ocalh	ost{	[localh	nost-	adaxa-a
r e	<u>F</u> ile	<u>E</u> dit	⊻iew <u>G</u> o	<u>T</u> oo	ols Window	<u>H</u> e	lp										
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ı	Cont	act		Client	ADAXA Pty	_td						0	rganisa	ation	*		
1 3	Acti	vity		<u>N</u> ame	Peter Milso	n											
ſ			<u>D</u> escr	ription													
			<u>C</u> om	ments													
-																	
5					✓ Active												
r			<u>E</u> Mail Ad	ldress	pmilsom@a	daxa	.com										
N 101			E	<u>Phone</u>	9876543								<u>2</u> nd Ph	ione	976543	8	
٦				<u>F</u> ax	9876548												
e II				<u>T</u> itle	Manager												
r			Business Pa	artner	Milsom McG	rego	r					Partne	er <u>L</u> oca	ation	Newmai	rket A	Auckland
s N			P <u>c</u>	sition	IT Manager						-		<u>B</u> irth	Iday			
E E			Last Co	ontact								l	Last Re	esult			

## **Activities for this Contact**

🖷 Co	onta	ct Peter	· Mil	som	Supe	erUs	er(	₫AD	AX/	۹ Pt	y Lt	d.A	daxa	a Pt	y Lt	d [l	ocal	host	{loc	alho	st-a	adaxa-
<u>F</u> ile	<u>E</u> dit	⊻iew <u>G</u>	<u>20 1</u>	<u>[</u> ools	Windo	OW	<u>H</u> el	р														
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Acti	vity	User/	'Cont:	act Pe	ter Mils	som																
		<u>A</u> ctiv	ity Ty	rpe En	nail																	
		Des	scripti	ion se	nd ema	ail to	req	luest	meet	ting												
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		<u>S</u> t:	art Da	ate						16/05	5/201	3 17	:57:3	8 🗉			<u>E</u> nc	l Date				
					Comple	ete																

Eile     Edit     View     Go     Tools     Window     Help       Image: Sales     Active     Search Key     Name     Probability     Closed Status     Work       Sales     Active     Search Key     Name     Probability     Closed Status     Work       Stage     Image: Ima	🖷 Sales Sta	ige 1	Interest Su	uperUser@ADAX	A Pty Ltd.A	Adaxa Pty Lt	d [loca
Sales StageActiveSearch KeyNameProbabilityClosed StatusWorStageIInterest0.00IOpportunityI10Lead1.00II20Proposal5.00II30Quotation15.00II40Active Discussion35.00I	<u>E</u> ile <u>E</u> dit ⊻	iew <u>G</u> o	<u>T</u> ools Wir	idow <u>H</u> elp			
Stage       Image: Image	5 💿 📑	Ē 🗊	🔆 📕 🔒	🔍 🛛 🗖 🔣	ی ک	🔶 🗄 🛧 :	♥ 👱
Opportunity       Image: Constraint of the second se	Sales	Active	Search Key	Name	Probability	Closed Status	Won
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Image: Second	Opportunity	•	10	Lead	1.00		
✓ 40 Active Discussion 35.00 □		~	20	Proposal	5.00		
		~	30	Quotation	15.00		
✓ 50 Preferred 50.00		~	40	Active Discussion	35.00		
		~	50	Preferred	50.00		
✓ 60 Selected 75.00 □		~	60	Selected	75.00		
✓       70       Rejected       0.00       ✓       □		~	70	Rejected	0.00	•	
✓ 80 Order Received 100.00 ✓			80	Order Received	100.00	✓	✓

## **Sales Stages Definition**

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.