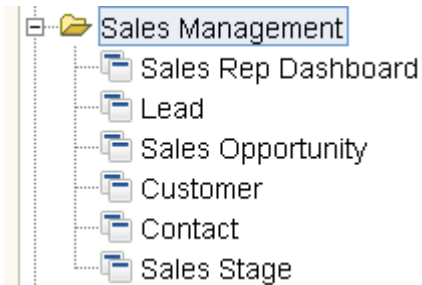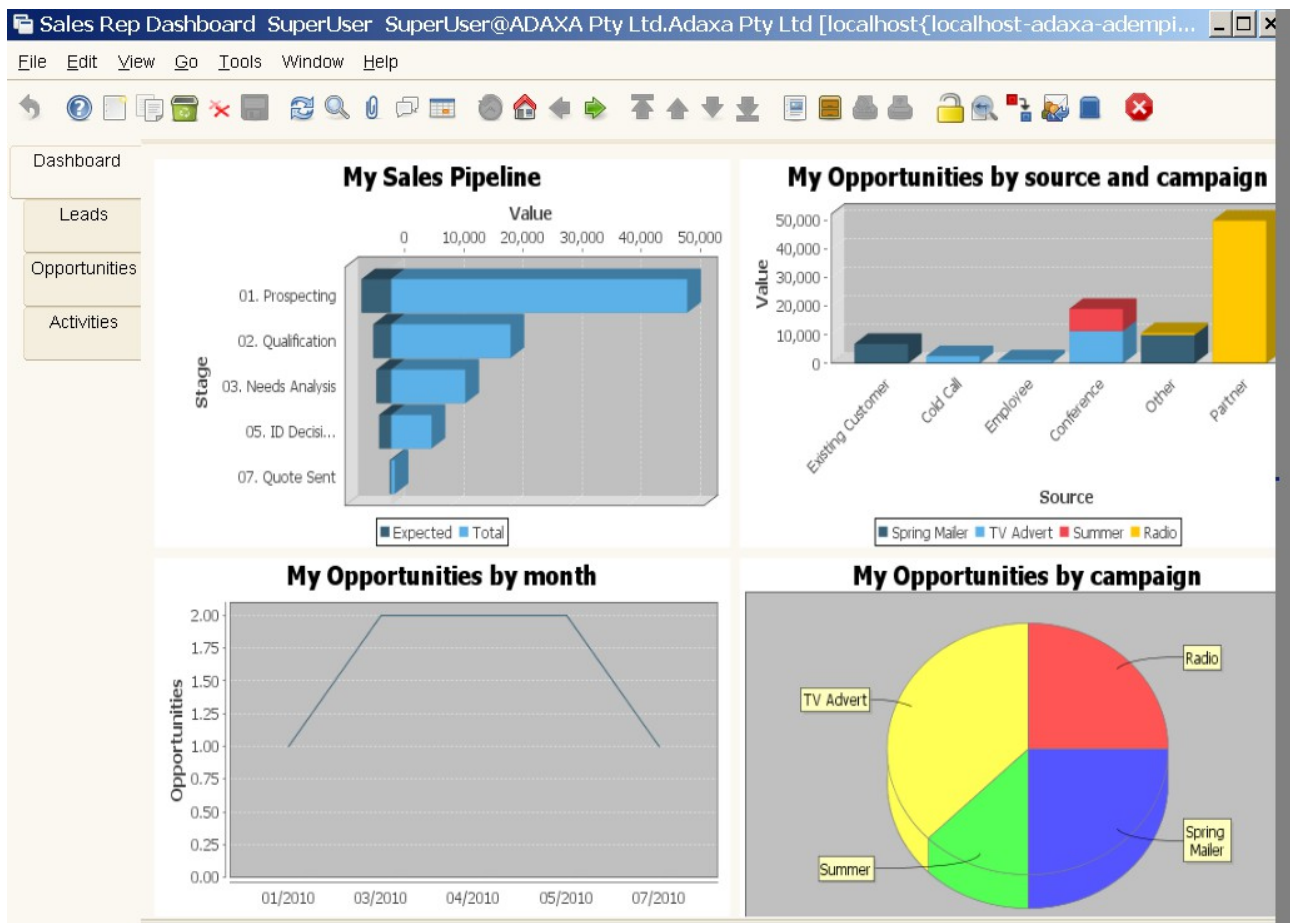# Functionality added by Adaxa for Sales management

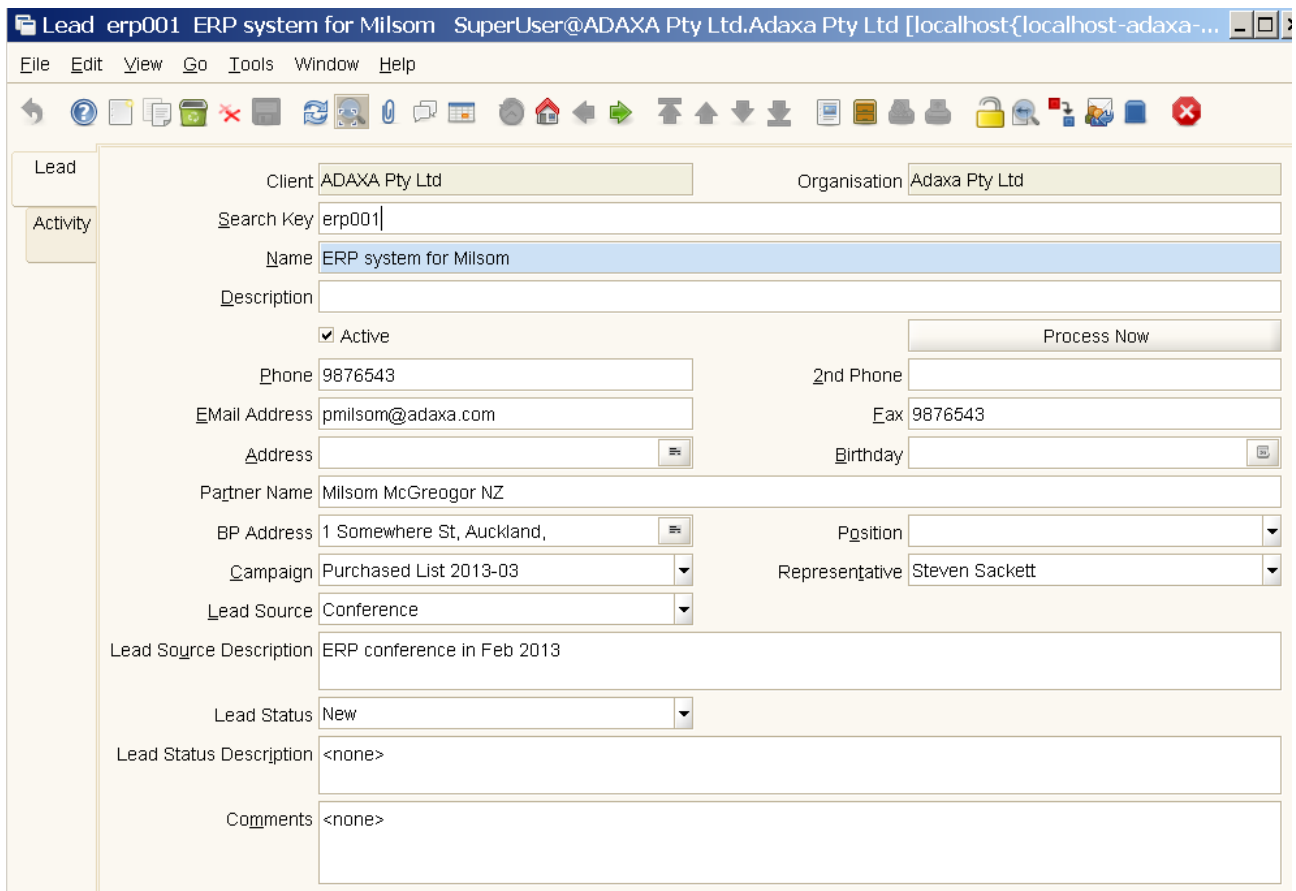## The Menu Items Added for Sales Management

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

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

A single Activity record in a Lead

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.
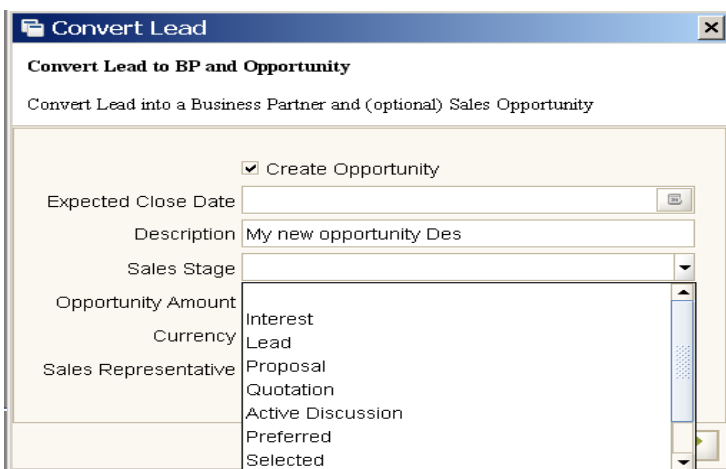
Conversion of Lead to an Opportunity
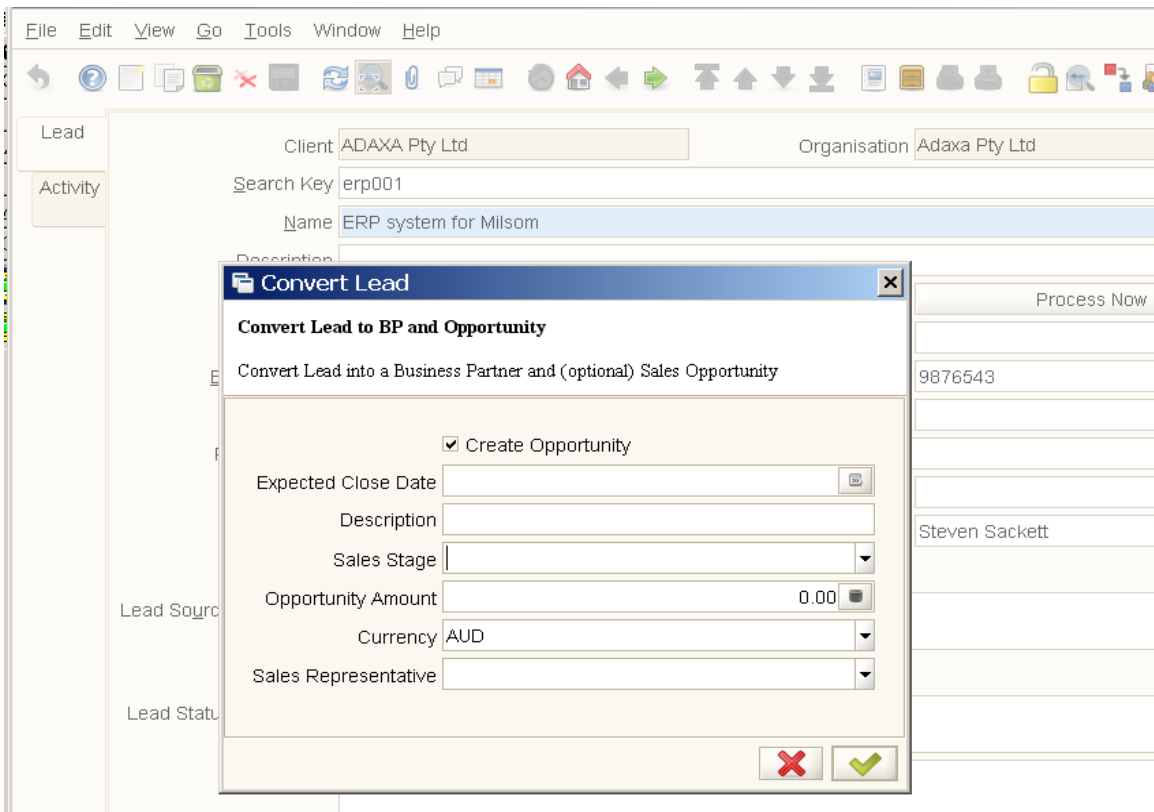
When the "Create Opportunity" process is run it will create
- The BP record,
- Contact(s)
- Locations
- Opportunity Record
- inherit ant Activity records

Sales Stage selection when creating Lead

The Opportunity Window

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

Lines are added to the Quote in usual way

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

Further Activities Entered under the Opportunity as Required

Choices in a new Activity

The Customer Window

Grid view

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)

Opportunities for this Customer

Contacts of this Customer

Activities happening with this Customer

Requests re this Customer

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

File Edit View Go Tools Window Help
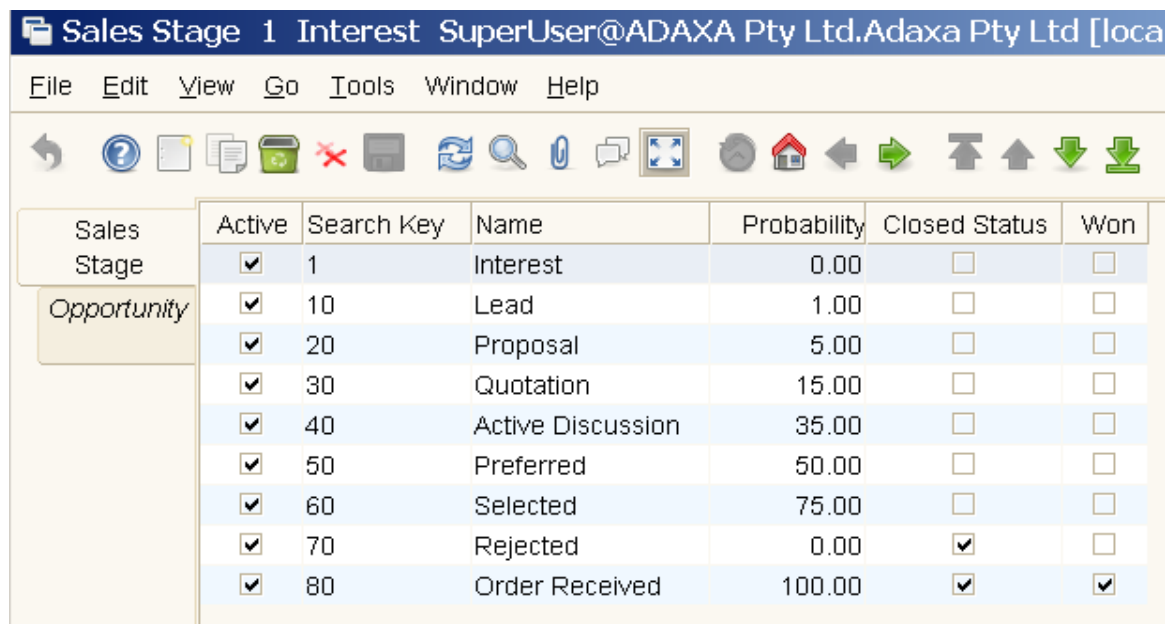
Field	Value	Field	Value
Client	ADAXA Pty Ltd	Organisation	Adaxa Pty Ltd
Request Type	Enhancement Request	Document No	
Group		Category	cat 1
Status		Resolution	
Priority	Medium	User Importance	Medium
Representative	Steven Sackett		
Summary	need to do some work here!		
Date last action			
Last Result			
Due type	Due	Date next action	17/05/2013 0:00:00

Tabs: Customer, Opportunities, Contacts, Activities, Locations, Contract Prices, Requests, Orders

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

Tabs: Customer, Opportunities, Contacts, Activities, Locations, Contract Prices, Requests, Orders

The Contact Window

(standard ADempiere information)

Activities for this Contact

Sales Stages Definition

Active	Search Key	Name	Probability	Closed Status	Won
✔	1	Interest	0.00	☐	☐
✔	10	Lead	1.00	☐	☐
✔	20	Proposal	5.00	☐	☐
✔	30	Quotation	15.00	☐	☐
✔	40	Active Discussion	35.00	☐	☐
✔	50	Preferred	50.00	☐	☐
✔	60	Selected	75.00	☐	☐
✔	70	Rejected	0.00	✔	☐
✔	80	Order Received	100.00	✔	✔

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.