HANSAWORLD

Demo – SERP – Digital Office (long demo)

Preparation

1. Import UK Demo Data
2. Login with:
   Standard ID: samuel@hansaworld.com
   Password: Sample99

Script

Good day everyone. Welcome to this demonstration of the Standard ERP Digital Office.

> **ACTION:** Open the landing page for the Digital Office:
> https://www.hansaworld.com/en/products/lp-digital-office

What I want to do is talk a little bit about how Hansa World can help You in Your ability to adapt, or rather, improve working remotely. The reason I say improve is because we are over a year and a half into the pandemic and most of us have adapted in some way or another, so this is not about adapting anymore, this is about winning, because we know that the current environment is going to linger. Some of you are watching this from home but others are back at the office so we need to make sure we have a mix of both to keep the work efficient.

Let's start with a little bit of perspective. We know that in the past few years businesses have been looking for ways to improve automation. This is not unfamiliar to us. This is a trend known as Digital Transformation.

Now, Digital Transformation is imperative for most businesses from small to enterprise, regardless of the industry and the pandemic has been the biggest accelerator for this need.

> **ACTION:** Open the article scroll down to the chart:
> https://www.ey.com/en_us/supply-chain/how-covid-19-impacted-supply-chains-and-what-comes-next

I won't bore you with statistics, I'll just say this - many surveys and articles speak of the same trend: Covid-19 has speeded the adaptation of digital technologies by several years - and many of these changes are here to stay. Impacts of Covid-19 on business today show that efficiency, visibility, and responsiveness are the top priorities over the next few years.

When I said we want to win, I meant that we want to win in these 3 areas.

Efficiency of operational processes as well as better service to customers is a key that will lead to customer loyalty and better market share.

You can see from this Ernst&Young article that Managing/reducing costs - is not a priority during covid times, but willingness to spend money in the short term is what many companies are doing and they are driven by the following two questions:

- How do You remain relevant during the pandemic?
- How do You help Your customers remain relevant?

So what exactly is Digital Office all about? The Digital office is a tool to help you improve the processes and efficiency internally, on the assumption that you're using it to good capacity it will help improve customer service, as well as broaden your market.

Digital Office primarily is a collaborative digital work environment that allows employees to perform business critical functions related to these areas here (Digital Office landing page):

- Communication;
- Workflow Overview that improves operational processes;
- Planning with Multi User built-in Calendar and Task Manager;
- and Business Approvals and Alerts.

These areas are common to all businesses so any company in any industry can benefit from them.
Let's go into Standard ERP and see what Digital Office is all about.

ACTION: Open your demo client with imported demo data. Login: SJ, Password: Sample99

Digital Office integrates Standard ERP features such as the Calendar, the Email, the Task Manager, the Conferences, Business Alerts, Document Management, and the Workflow Overview. All of this in one easy to use module that some of you are well familiar with.

I will now show you how all of these components come together. Let's start with the Workflow Overview.

ACTION: Open Workflow Overview, point to the relevant areas as you mention them (Headings, Amounts)

The Workflow Overview in Standard ERP is a must have feature for any sales team. What it does is - it outlines all opportunities in a single window, giving the sales person or team an instant overview. The opportunities are classified based on the stage of the process and we are able to see the value of Leads and Prospects, Quotations, whether we have won the business, what's on ice and these headings are all easily configurable and can be tweaked to the way your business likes to run things.

ACTION: Show the 'View' field (top left corner, show drop down menu)

I must also note that this Workflow Overview is not limited to be used only by the sales teams, it can be used by any department. Some examples of these are Project Management, Debt Collection in Finance, Human Resources for hiring stages, Marketing for promotional campaigns, Real Estate…..the possibilities are endless…

ACTION: Close Workflow Overview, back to Navigation Centre window

Let's now look at a very normal sales situation. I receive an email suggesting a new lead.

> ACTION: Open Mailbox, open email ''Music instruments for All that Jazz Academy''

I open up my mailbox that is inbuilt in Standard ERP. The email says that a potential customer would like to meet tomorrow at 11:00 to discuss this. Now the very first thing I do is a little victory dance, and then I would need to register this new lead in the CRM.

> ACTION: Create new Activity from email top right corner > Create >> Workflow Activity

See how easy it is to do straight from the email. Right from the email I go to Workflow Activity and tell the system I have got a new Lead.

> ACTION: Add type: LEAD, link customer > Contact: search for number 057 > Save

I link the customer to the record and hit save. Just like that in a few simple steps, if I now open up Workflow Overview I will see that I have a new lead from this company as of today.

> ACTION: Open Workflow Overview, show the last entry in the LEADS column

So that was the first step.

My next step is to plan this meeting for tomorrow.

> ACTION: Same Workflow Overview > duplicate > change date to tomorrow > change type to
> MEETING > put CALENDAR instead of TASK

I am going to create a new activity and what I also would like to do is invite my colleague Audrey, who happens to be an expert on this particular product line.

> ACTION: Press Cmnd+M > open Calendar > open tomorrow > check SJ,AM together (make
> sure you have calendar entries so it's not an empty calendar and so does Aubrey but
> nothing at 11-12 for the meeting day)

To do that I will open the shared Calendar to see if she is available at that time and it seems she doesn't have anything for 11 o'clock, so I am going to add her to the invite.

> ACTION: Close Calendar, go back to the Activity you were editing

I am also going to set a reminder both for myself and for Audrey 30min before the meeting via SMS.

> **ACTION: Set Alarm > Reminder 30min > SMS**

This Activity will now show up on both mine and Audrey's calendars.

After the meeting what I like to do is put my notes into the system.

> **ACTION: Open Activity again >> add text below in the matrix: Quote for 10 violins**

After the meeting has taken place I know that their interest is genuine so I can move them to the Prospects column in my Workflow Overview.

> **ACTION: Change Type to PROS (Prospect)**

Even though I haven't quoted them yet, my experience as a sales person tells me the value is going to be somewhere around 4000.

> **ACTION: Add Amount >> 40000**

With that change, I now see that my Lead has progressed to a Prospect and there is a potential deal value of 4000.

> **ACTION: Close the Activity window and see Workflow Overview update the columns**

Nest step of course is to prepare a Quote. From the Operations Menu, I create a Quotation.

> **ACTION: Open the same Activity > Create: Quotation**

I add the items that I want, remember, it was 10 violins.

> **ACTION: Lookup Item 10116 > Quantity: 10 > Class: V > Save**

At this point, I'm going to send it out without any discounts. I save the quotation, and I email it to the customer directly from the quotation because the built-in email creates an email and adds the attachment automatically, and the customer now has it instantly.

> **ACTION: Create > Email > check attachment (NOTE: in demo version without an enabler the PDF file wont get created!)**

He comes back to me saying he's not too happy with the quote as there is no discount, he would like a 30% discount and he promises repeat orders coming up to 100 units by the end of the year to justify it. I am happy to do it, however, I do not have the authority, so I will add the discount first.

ACTION: Add discount of 30
            Open attachments > create a note > write: will order 100 by year end

Now if I try to print or email this quote the system will stop e because the discount has not been approved yet. So what do I do? I use the built-in Business Alerts feature to request approval from my manager.

ACTION: Operations Menu > Request Approval

Let's now log in as my manager - AM

ACTION: Log out and log in as AM, no password

As soon as she logs in there will be a message from the Task Manager saying that there is something in need of her attention. When she opens up the Activity she sees what it's about and can also open up the linked Quotation and the attachments in the Link Manager to help her make this decision.

ACTION: Open Task > open record > open Link Manager and Attachment, show note
            Close record > on the approval activity click on Approve

In the end, she chooses to approve it.

Now I will log in as myself again.

ACTION: Log out > log in with: SJ, password: Sample99 > open Register: Quotations (on your
            Personal Desktop)

Notice there's a tick next to the quotation meaning it is now approved.

ACTION: Circle/show the Approval tick

Via the Link Manager, we can also see all the relevant actions and attachments for this quotation, including who approved it and when giving us full traceability.

ACTION: Open the Quotation and show Attachment and Link Manager

The next thing that happened is the confirmation order comes in from the customer along with a letter of intent which means we won their business.

Now I would like these documents to be accessible to everyone in my team. So from the email directly I can copy this to a Conference called Signed Contracts and Agreements.

Now everyone who has access to this specific Conference can open it up and see the contents.

So you can see how convenient it is to have built-in conferences instead of keeping documents outside of the system.

This, in a nutshell, is how easy it is to bring different areas of the system together to make the daily processes much more efficient and make sure all of the information is in one place.

Let's look at the next part - improving our customer service by faster response times. It is very important to give our best customer experience because it leads to happy and loyal customers and also grows our business.

Another common situation - a customer calls us complaining about a delivery they haven't received. We are receiving this call from inside Standard ERP.

Immediately we see the benefit of having a built-in Telephony - you don't have to leave your space or pick up another device. As soon as the call comes in, and you answer it, you have already identified who the caller is.

As soon as you answer, you can pull up the Customer Status Report, that I'm sure you're familiar with if you are using Standard ERP. But, if you are using it with the CRM and all the other Digital Office components, it gets even better! The minute you answer the call you have the whole history of who the customer is, their Classification, Contact Persons, all of the interactions and engagements between your teams and their teams. You also have financial information including any outstanding Invoices and you can have an overview of the business they have given you over the last months or years and what items they are ordering from you in what quantities and margins.

It's literally a 360-degree overview of everything your Standard ERP knows about this customer and it's available to you in one screen. It means you can give really fast answers to the customer. Let's use an example.

Joseph who has just called us is complaining about a delivery that is missing and he's been calling about it for some time now.

ACTION: Scroll up to Activities and circle top comment

I can see from the logged activities that he is right, he has been calling previously and we have told him that there are outstanding Quotations hence the delivery is on hold.

So I tell him about that and he says he hasn't received the Invoice and asks to re-send it to him so he makes sure it gets paid but he needs his delivery ASAP.

ACTION: Scroll down to Invoices> open 2021 Invoice > email it to him

While still talking to him I open up the last Invoice and I send it out by email without telling him to wait or that I'll get back to him.

ACTION: Scroll to Orders > open one that says Not Shipped

Then I find the delivery in question and make it ready for dispatch.

ACTION: Create > Delivery > OK > Save > Create > Invoice > OK > Save

I also create an Invoice and he is happy now knowing his delivery will reach him in time. Now that we've fixed the pressing issue and he has relaxed it's time to talk to him about those quotations we have sent to him previously and he is he is willing to buy more.

ACTION: Open Quotation 21100049

He says yes but wants a better discount because they've been with us for so long, so if we up the discount to 10% he'll make sure it gets actioned.

ACTION: Enter discount amount 10

Once we've arrived at a discount, I send it for approval and the process goes on as you know.

ACTION: Operations Menu >> Request Approval >> close all windows except for Navigation Centre

So what have I done here? Without having to tell the customer I have to check with my team and get back to you, I've answered his questions, I made sure he received the Invoice for him to pay, I've actioned his delivery, and I've sold to him making sure all our approval processed are followed and he gets the discount he wants. He is now a happy customer once again.

We have just seen how business processes can be improved with the tools and the components of Digital Office and how they all come together allowing us not just to adapt to remote working but to increase efficiency, visibility, and responsiveness to give this kind of service to our customers.

Thank You for Your attention and enjoy the rest of your day!