

Demo - SERP - Digital Office

Preparation

1. Import provided Demo Data
2. Login with:
Standard ID: sample@hansaworld.com
Password: Sample99
3. In WO>>Quotations column, adjust the date of activities linked to quotations to today's date, so they show green in the WO.
4. For the day of the demo, create an activity in SJ's and one in AM's calendar in the afternoon (different colors)

Script

Any organisation, in any industry, can benefit from Standard ERPs Digital Office.

Digital Office integrates Standard ERP features such as Calendar, Email, Conferences, Business Alerts, Document Management, Task Manager and Workflow Overview in one easy to use module.

Let us show you how easy it is to use Standard ERPs Digital Office when you receive a new sales enquiry. The Workflow Overview in Standard ERP is a must have feature for any salesperson. It outlines all opportunities in a single window, giving the salesperson an instant overview of all opportunities.

Let's start as Samuel who works as a sales person...

ACTION: User SJ login to the client and open Workflow Overview. Period 2019-2025

As we can see here, all the opportunities are classified based on the stage of the opportunity. We are able to see the potential value of all the Sales "Leads", "Prospects", "Quotations", and even those "On Ice".

ACTION: In the View field enter 'SALES' (if not defaulted), select SJ as a person then show the column headings with cursor

These headings are configurable to the meet the requirement of the company environment.

Lets look at the "Quoted" column. Here are some quotes that need our attention today, as indicated by the green icon.

ACTION: Move cursor to indicate the green icon under the Quotations Column

Let's take a look at the first quote. We can see here from the Link Manager that this quote was emailed to the customer a few days ago and we can click on the link to go to our mailbox, read the mail and then check to see if there is any new mail.

ACTION: Click on the quote with green icon and open it, then click on the link manager and select the email link and open it to show an email Then type CMD M and from Navigation Centre to go to the personal mailbox, open the unread email about musical instruments.

We see that we have received a new email.

ACTION: Select the Create button in the email and then new Workflow Activity.

After reading the email we can see that the customer wishes to be contacted the following day at 11.00 AM. From the email we can create a new Workflow Activity for the call.

ACTION: Add type: LEAD - start time: 11.00 - end time: 12.00 - Start date: Following day - Task type: Calendar - Calendar:Time
Go to Calendar, select SJ,AM for date selected for meeting and show that AM is free between 11 and 12pm and SJ's calendar is also free. Now add Cc AM to the activity

As you can see the header is already filled-in from the email.

We simply add in the details for the following day and add to calendar.

As this is a request for musical instruments we would like to add Audrey to the call, who is our expert in this area.

By viewing the multi-user Calendar we can check if Audrey is free at 11AM tomorrow. And as we see here, she is available, so we go back to the Activity Record and CC AM.

Audrey will now see this meeting in her calendar.

ACTION: Select tab Alarm - Select SMS as Alarm Type - Select Alarm:15 minutes - Select: Call under Symbol - Add contact 055 and save the record.

We can also add reminders for this activity, and get notifications via SMS, pop up message or email. We can also add our customer Limerick Music school ,to the activity record.

ACTION: Open the Workflow Overview and show the different views. Select view:SALES (make sure the date is 2017:2019) - Create - Quotation

The following day we receive a Business Alert via SMS about the call to the customer. We can easily find our activity from the Workflow Overview and open it.

They want to purchase 10 guitars, 5 pianos and 1 drum set.

Directly from the Workflow Overview LEAD column we can open our activity and create a new quotation with Company name and other fields already completed.

ACTION: (duplicate existing quote number 21100041 OR) Add item 10113 - 10 guitars - item 10112- 5 pianos and item 10114 -1 drum set - add 20% discount - quotation class:V - save - request approval

We can quickly create the quotation and add the 20% discount this customer requested. We send this quote to Leila, the Sales Manager, as this quote requires her approval.

ACTION: On Operations menu of quote select Request approval
Login with User: LD; Password: Sample88, and see the approval request on task manager

Leila then opens her Task manager and finds an auto generated business alert.
After reviewing the linked quotation Leila approves the discount and the quotation can now be automatically sent to the customer.

ACTION: Mark the Quotation as accepted and go to Create>>Email.
Log back in with SJ / Sample99

Since the customer was happy with our offer we receive an order confirmation - the signed quote - via email.

ACTION: Select the order confirmation mail in your inbox - add the email to Confirmed Orders Conference.
Show other confirmed orders in browse window of conference

The company has a policy to keep track of all confirmed orders and we can make use of our conferences feature in Standard ERP and save this signed quote to the Confirmed Orders conference. Here, Samuel and his colleagues (who have access) can easily find all signed quotations from customers.

Samuel can now continue with other leads.

ACTION: Go to Business Alerts>>Settings>>and highlight Contact delivery alerts; but do not open.

We can send out delivery alerts to the customer when the order is ready to be delivered.

ACTION: Show WO with Project management, debt collection, HR

In addition to the Sales pipeline overview Digital Office can be used to manage multiple workflows such as project management, marketing campaigns, real estate.....the possibilities are endless.

We have shown you how easy it is to have full control over your business with the functionality that Standard ERP - Digital Office has to offer.

If you would like to know more, please contact your local HansaWorld office today.