HANSAWORLD

Spotlight - Introduction Demo - part 3

Preparation before the demo

The attached Text backup from July 2025 is based on UK Sample data; with the following adjustments made:

1. Two additional log-ins: SY>>Registers>>Persons>>Browse window Operations menu “Change password”.
   Leila Dinnerplate, LD. Password: Sample88
   Audrey McDonnall, AM. Password Sample77

2. Reporting Periods (old) setting should include all years from 2018 - current.

3. Make sure the workflow overview window opens with a period including quotations to date. This period can be fixated using the window-save-position feature.

4. Set up the workflow overview so in the column ‘valid quotations’ there are entries with green priority indicator, by opening the workflow activity from the quote, and changing it’s date to today’s date. Tip: Quotation 21100020, the last one of 3 in the column ‘Valid Quotations’ is already set up with several activities fitting to this script.

5. Copy this text and keep it in your clipboard - you will need to paste it (alternatively write it) into an activity later.
HQ will meet next Tuesday to discuss and finalise. Sounded quite positive

6. The customer 006 - Default Hotel customer received contact details: at least a phone, mobile and email address.

7. Set up Approval rules for Purchase Orders, to require approval by SJ. Create 6 activity types to properly process the approval by duplicating and renaming the approval activity types for Expenses (E1>>PO1). Approval User should be set to be AM.

8. Create an item - MacBook Pro and give it a base price per unit of 1057.50 and create an open Purchase Order for 2 units of this item to this price.

9. Add to the personal desktop:
   Approval Rules to the personal Desktop of SJ
   Purchase Order Nr 1032 to the personal Desktop of AM

Benefits

1. Visual workflow tracking

Gain a clear, colour-coded graphical overview of all related activities, helping users manage their tasks by priority and status.

2. Real-time opportunity management

Instantly view and classify all sales opportunities, leads, and quotations from a single screen, with configurable categories and values.

3. Integrated communications

Contact customers directly via email, phone, or SMS from, and easily log interactions for future reference.

4. Cross-departmental workflow support

Workflow Overview supports not just sales, but also other departments like accounts receivable and collections, making it a flexible tool across the business.

5. Automated approval workflow

Enforce company policies with approval rules based on transaction value, approver roles, and escalation procedures, reducing the need for manual follow-up.

6. Multi-level and conditional approvals

Set up complex approval chains with fallback options when key staff are unavailable, ensuring continuity and compliance.

7. Automatic notifications for pending tasks

Use pop-up alerts or messages (via email or SMS) to notify users of pending approvals or tasks, increasing responsiveness and accountability.

8. Attachment and documentation access

Open Purchase Orders directly from activities, and view all related documents like quotes and product images in one place.

9. Customisable business alerts

Receive real-time alerts for key business events, like high-value orders, overdue invoices, or system issues—configured with minimal effort.

Script

Welcome back! In the last video, we saw how easy it is to manage your sales pipeline using Standard ERP and looked further into how the powerful document management and calendar features can assist with making your business processes much smoother.

Today, I'm going to show you Standard ERP's workflow management features and how they give you a complete overview of your business processes.

Let's take a look at the Workflow Manager on a Purchase Order with many related activities connected throughout the system.

ACTION: Log in as AM, Password Sample77
From Personal Desktop, open the purchase order No.1032

Here you can see the "heartbeat" symbol in red, the Workflow Manager, indicating that you have overdue tasks for this Purchase Order.

ACTION: Open it by clicking "heartbeat" symbol. 2 activities: one red, one ticked are linked.

Workflow Manager provides you an overview of all related activities with a status indication.

Red for late activities; green for today's tasks, tick for completed and blank for future tasks.

Workflow Manager provides a graphical overview for activities in Standard ERP helping you manage daily business more efficiently.

Let's now take a look at the Workflow Overview.

ACTION: Show the Icon above the Personal Productivity area of the Navigation Centre

The Workflow Overview is a must have feature for any salesperson. It outlines all opportunities in a single window, giving the salesperson an instant overview.

ACTION: Click on the Workflow Overview icon

As we can see here, opportunities are classified based on the stage of the opportunity. We can also see the potential value of our Quotations.

ACTION: Show that by moving the mouse over that number in Valid Quotations column.

These classifications are flexible and can be configured in the way management prefers.

I see instantly that there are a couple of quotations that I need to deal with. I also notice, by the 'Green' colour of my 'Workflow Manager' icon, that I need to deal with this quotation today.

ACTION: Open the quote mentioned

Here, I can see the history of all activities, those that are done and those pending. I'll open the last one, - also showing the green colour indicating another activity I should deal with today.

With Standard ERP's integrated communications module, by clicking on the 'Phone' Icon, I can see different methods for contacting this customer, by email or a phone call for example.

ACTION: IF YOU HAVE A LIVE VERSION: click on the phone number and click on Call - after call initiates, hang up and close communicator screen.

ACTION: IF YOU HAVE AN OFFLINE VERSION: click on the mobile number and click on 'Text Message'. Enter a message, e.g "Meeting details agreed" and save.

Adjust, what you say in the next sentence (Call / Message) according to the method you choose.

For now I will *Make a call / Send a Text Message*

After *Finishing the call* / *Sending the message*, I will record some notes.

ACTION: Create an activity (if you chose 'call' option, the activity will pop up automatically) and write "HQ will meet next Tuesday to discuss and finalise. Sounded quite positive"

Now I will mark this activity as done.

ACTION: OK, save and close

Back to my overview, I have two more colour-coded icons for all opportunities requiring my immediate attention.

Those in red are opportunities that are overdue and should have already been completed. Those in yellow are opportunities where the next step has not been specified. Let's open one of those.

ACTION: Open an Idea with a yellow exclamation mark

This idea was in fact converted successfully into a qualified lead. We can therefore update the Result to converted.

ACTION: Drag and drop the activity from IDEA to LEAD

The IDEA has now been transferred to a LEAD and I can open that lead and update some of the fields, - such as Value and Modules; - Modules being those products this specific customer is interested in purchasing.

ACTION: Enter EUR in the currency field, and 25,000 into the value field, and in the matrix, enter CRM and Pipeline Management in the text field and save.

Next, I'll create a next step activity to ensure I follow up with the customer.

ACTION: Click on “+” and enter an activity with the following Text “Invite customer to view Online Demo” and put the date 2 days from now. Save and close

I can also view all opportunities for a specific Salesperson, or a Sales Group, for a specific time period period, - or track the progress of a specific customer, - all from the same window.

So, with a few simple steps, I was able to get updates on my quotations and follow up on other opportunities, all done using the Workflow Overview, - which enables me to stay on top of all my leads and increase my closing rate.

Workflow Overview isn’t only for managing a sales pipeline. It is a powerful function that can be geared to support the workflow of any department, such as accounts receivable, collections, and so on.

Now that we have seen how useful the Workflow Overview is, let’s take a look at other activities in Standard ERP, such as purchase approvals.

ACTION: Log in as SJ

To ensure certain transactions go through the right approval process, Standard ERP offers different options to manage this.

Let’s take an example of such a transaction; - a Purchase Order.

ACTION: Go to modules>>Purchase Orders and open the Browse window.

Our purchaser, Sam, has created a Purchase Order that needs to be approved.

ACTION: Circle the red ‘Exclamation mark’ in the browse window, then open the Purchase order.

This is for two Mac Book Pro laptops, for a price of 2,115, which is more than the 1,000 limit set by management.

ACTION: Click on Comment tab of the Purchase Order and show the approval Status

I can see that an approval is required, but has not been requested.

So let’s go ahead and do that.

ACTION: Click on operation >> Request Approval.

Now, as you can see, the status has changed to “Pending”.

This was done automatically based on the settings defined for Purchase Order approvals. You have total control over your business processes and the tools in Standard ERP to ensure your company policies are upheld.

ACTION: Close PO and PO Browse windows

Now, I will log in as Audrey, who has been designated as a person with the authority to Approve this Purchase Order.

ACTION: Click Log In Icon and Log In as AM, open her Task Manager (if it does not pop up itself)

As soon as AM logs in, the Task Manager will pop up and show all pending approval requests - and there's one of the Purchase Order we just created.

This automatic notification ensures that approvals are processed on time, without the need for constant follow up and extra communication. We can set these approvals to be sent via Email, or even by SMS.

So Audrey will open this activity, and she can see that this is referring to purchase order number 26 with a value of 2,115.

She can now click a button to open the Purchase Order directly from the activity where all the required data is accessible.

She can also open all attachments related to the Purchase Order.

ACTION: Press Paperclip button on the Purchase Order. See the picture of MacBook, and Quotation as pdf.

Here, we can even see if there is a Quotation from the supplier, but, as everything seems in order, I don't actually need it at the moment.

ACTION: Close the attachment window

So I'll go ahead and approve this.

ACTION: Close PO and press Approved button

Standard ERP offers a comprehensive solution for Approvals, - allowing for multi-level approvals, different approval processes, and different approvers with authority dependent up on the value.

We can also configure advanced options. Such as when an employee with approval authority goes on vacation, requests can then be forwarded to another person. The system can also be set up allowing for approvers to be selected from a list.

Now, I'll log in as Sam and open the Purchase Order.

ACTION: Click on Log In icon, and log in as SJ
Open PO browse then PO number 1034 (the one AM just approved)

We see the Purchase Order is now OKed and the status is set to approved.

ACTION: Click on Comment Tab and show the status 'Approved'
Close the PO and Browse window and click on Approval Rules from Personal Desktop

Here is a list of the different processes and transactions for which I can require approval, - covering many of the business processes you may need.

To make it even more efficient, we can set up business alerts for any process in the system,

ACTION: Open the Settings in Business Alerts module.

- such as when your server is down, there is a large credit note, a quotation with gross profit exceeding a certain value or is lower than a specified percentage, when a customer places big order, total sales per day, week, and month, and more!

Our consultants can work with you to set up those not already standard in the system - all requiring minimal time.

With Standard ERP, there are many ways to get notified of the events and operations in your business. Using the integrated Business Alerts functionality, you can also notify customers of events related to their account.

For example, sending a “Thank You” when a quote has been accepted or an order placed at a certain value. Inform customers when a delivery has been made or for when an invoice is due.

It’s all easy to set up in Standard ERP with our consultants standing by should you require assistance.

With Business Alerts, you have real-time information for important events happening in your system.

Inform customers, use preventative measures to avoid problems, and build good relationships with customers through cost-effective CRM tools.

Today, we’ve reviewed business alerts and workflow management. We’ve seen the integrated approval workflow in Standard ERP, - allowing for transparency and full control of your business.