

Spotlight - SERP - Quotation

Preparation if using demo data attached

1. Import Demo Data

2. Login with

Standard ID: sample@hansaworld.com

Passworld: Sample99

Preparation for creating your own demo data

1. Import UK Sample Data

2. Create Item

'Cardboard box'

Base Price: 25.00

3. Create Customer

Plastic Cups Limited. Give it an address, phone and important: email address (can be fictional).

4. Setup Module Quotations for Login

Modules>>System>>Settings>>Access Rights>>Admin>>Change Line 1>> Module>>

Quotations>>Full

5. Setup Customer Categories in CRM>>Settings>>Customer Categories; and assign LEAD to Plastic Cups Ltd.

LEAD Lead

PROSP Prospect

6. Setup Quotation Classes

Module>>Quotations>>Settings>>Quotations Classes

V Valid

W Won

L Lost

With Standard ERP it is easy it is to create a new quotation from an Inbound Phone Enquiry, and then follow the sales process.

I receive a call from Plastic Cups Ltd, who need a quick estimation.

I open quotations , and create a new quote [click new],

ACTION: Select Register, double click Quotations, select New Quotations

now I can select from my current list of leads

ACTION: Past Special in Customer field

I can search for 'Plastic Cups',

ACTION: Select name on past special window, start typing Plastic cups until they are high listed.
Open Contact Card from Past Special window with shortcut

and I will update them from a lead to a Prospect on their contact card

ACTION: Change Customer Category from LEAD, to PROSP, select save and enter them on the Quotation Record

I will enter the validity of the Quote

ACTION: Past Special in Valid Until field, and select the last day of the month

and also the date when I will follow up with Plastic Cups

ACTION: Past Special in Make Contact field, select date

and the date when they expect to make a decision

ACTION: Past Special in Decision Date field, select date

I will also select the class

ACTION: Past Special in Quotation Class field, select V

and I will put a probability of 90 as they seem eager to buy

ACTION: Type 90 in Probability % field

They need an estimate for 100 cardboard boxes

ACTION: Past Special in Item field, search for Cardboard box, enter
ACTION: in Qty field type 100

I will save the quote and send it by email while I am on the phone with my customer

ACTION: Select Save
ACTION: Select Create, Email, select Sent, select Save, close email window

I will also create an activity for my colleague 'Nick' to follow up in a weeks a time.

ACTION: Select Create, select Workflow Activity

I will add myself as CC to follow up and keep myself in the loop.

ACTION: Change Person to NM, and CC to SJ

Let me also just add a quick text

ACTION: In Text field type Follow up on Quotation

and I add some info for Nick

ACTION: Matrix Text field type Offer discount if double the qty

I will also create an Alarm for Nick to get a mail 1 day in advance.

ACTION: Alarm Tab, select Alarm Type Email, Select Days Before, Unit 1, select Save, Close activity

So with a few easy steps I was able to create a quote and start a workflow to follow up with this new prospect.

Using the Quotations module which is fully integrated to the CRM in Standard ERP, I can track all sales activities for the sales team and ensure we are on top of all opportunities.