AZOTEL S06-02 v100 (2015-03)

S06 – SIMPLer Scheduling, Dispatch and Sales
SIMPLer Sales Tracking Guide

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CONTENTS

-1- INTRODUCTION

This guide will explain the main functions of the Sales Tracking feature on SIMPLer and how it can be used to record all possible sales items and each sales action relating to those Sales Items.

The Sales Tracking feature on SIMPLer also allows you to keep a record of each sales action that is associated with each Sales Item, which can be used as a historical reference. It can be used to record the deadline date and the closed date of each action and it can be used to assign a Sales Team member a particular action, which can then be sent to them daily in order to inform them of any outstanding tasks, that need to be completed.

It also gives the Sales Team members independence to login to SIMPLer and update/modify existing Sales Actions, open/close sales actions and close Sales Items as the Items progress.

-2- SIMPLer Sales Tracking Functionality for Operators

-2.1- User setup for sales team members

1) In order to set-up a Sales Team member, they must first be given a user account in SIMPLer

    1) Go to ***Settings → Add a new User*** (Fig 2.1-1).

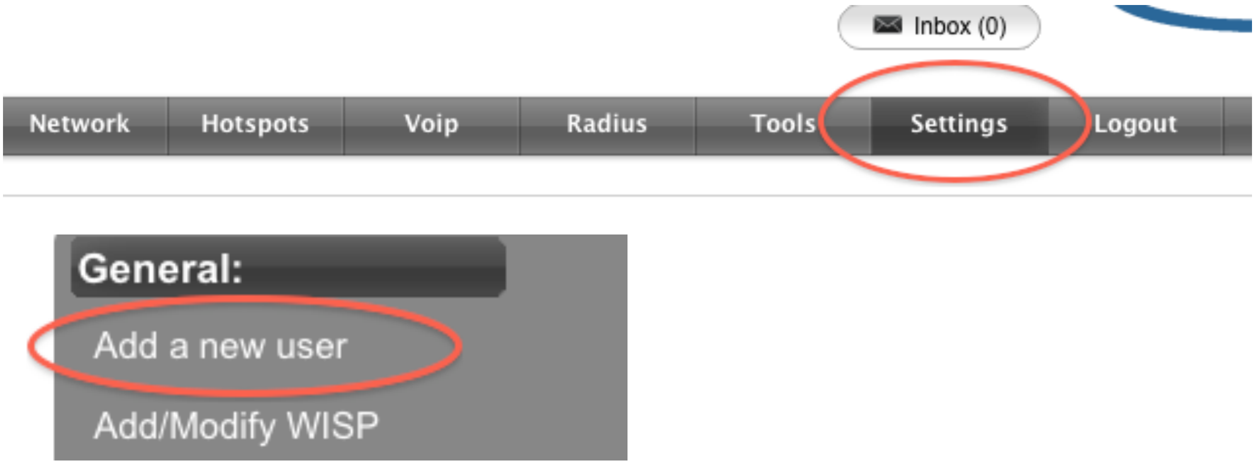


Fig 2.1-1 New User Setup on SIMPLer

2) Fill in all the appropriate details for the sales team member i.e. User ID, Mail, password etc. Make sure to select "(3) User" as status. Do not press the Add button yet. The mail input should be the sales team member's normal email address.

3) Before adding the new User, press the "Clear All Rights" button, and select the rights for the sales team member as shown below, under the "Salesissues" and "Salestracking" headings.

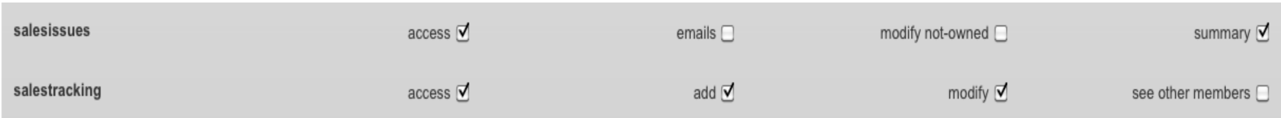


Fig 2.1-2 User rights for Sales Team members

4) Once the Sales Team member user rights have been selected, press the "Add" button in order to create a new User account.

Fig 2.1-3 Adding User account to SIMPLer

-2.2- Location of Sales Tracking Feature

1) In order to locate the Sales Tracking feature in SIMPLer, go to ***Customers → Sales Tracking*** (Fig 2.2-1).

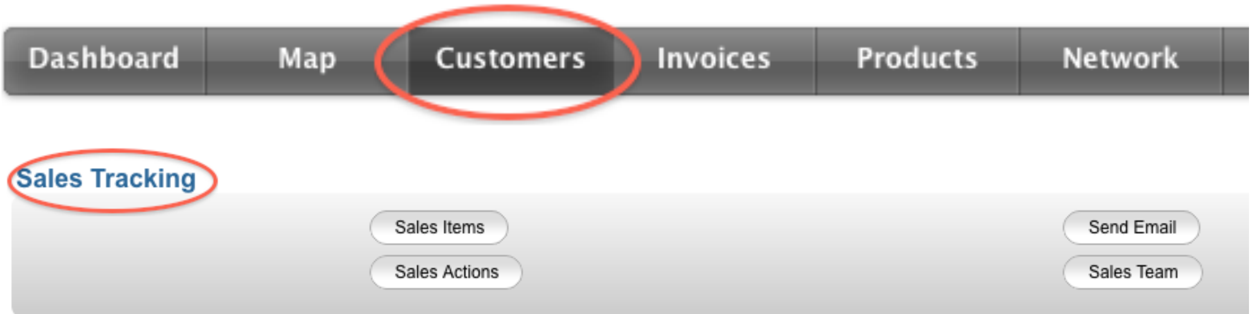


Fig 2.2-1. Sales Tracking

2) There are four options listed under the Sales Tracking heading, as shown above (Fig 2.2-1);

    i. Sales Items
    ii. Sales Actions
    iii. Send Email
    iv. Sales Team

3) Under the Sales Items heading, a new Sales Item record may be created or all closed, open or waiting for customer Sales Items may be view along with their subsequent closed and open actions.

4) Under the Sales Action heading, a new Action may be created in relation to a given Sales Items, which is assigned to a particular Sales Team member and is also given an Action description and deadline date.

5) Under the Sales Team heading, Sales team members are added along with their details including Email, phone number, SIMPLer User ID and Gmail account for calendaring integration.

6) The Send Email heading facilitates the manual sending of all Sales Actions for each Item to a specified email address. It can also facilitate the manual sending of items relating to varying statuses i.e. fallback, prospect, proposal etc.

-2.3- Input of Sales Team members

1) Go to ***Customers → Sales Tracking → Sales Team*** (Fig 2.3-1).

Fig 2.3-1 Sales Team Member Input

2) In order to add a sales team member, select "Add" as shown below.

Fig 2.3-2 Adding a Sales Team member

3) Fill in the appropriate details for that sales team member including their Name, Nickname (please note that the nickname should represent something meaningful in relation to the sales team member for future reference), Contact Number and Email Address as is shown in Fig 2.3-3.

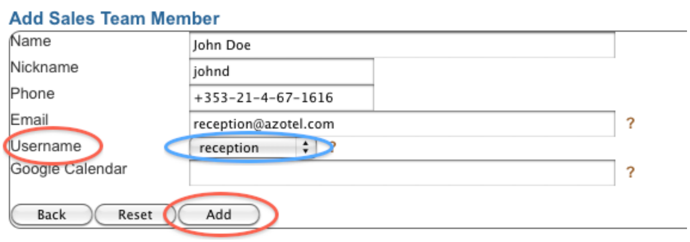


Fig 2.3-3 Sales Team member details

4) When selecting the username, it should correspond with that given to the Sales team member in the initial User Setup.

5) Finally a Google Email address can be specified for each sales team member, which will accommodate the integration with the Calendaring function in Google mail, similar to that of the SIMPLer Installer scheduling. (Please note that the addition of a Google Email is optional).

6) Finally Select “Add” in order to add the Sales Team member to the Sales Tracking Feature.

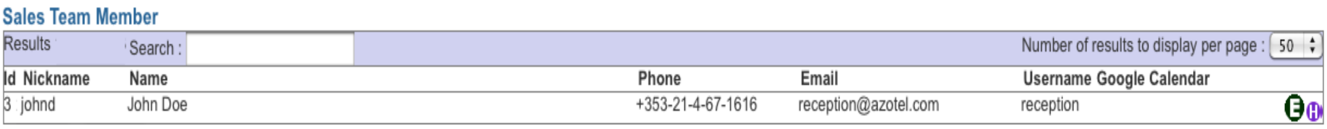


Fig 2.3-4 Sales Team member record

-2.4- Entering a Customer record

1) In order to open a new Sales Item under the Sales Tracking feature, the customer for whom the Sales Items will be opened for must first be inputted into SIMPLer.

2) Please refer to the Azotel SIMPLer Quick Start Tutorials V004 (2009-11), for a guide to Basic Customer Setup.

-2.5- Opening a Sales Item

1) In order to open a new Sales Item, go to ***Customers → Sales Tracking → Sales Items*** (Fig 2.5-1).

Fig 2.5-1 Sales Items

2) In order to add a new sales item select the “Add” button and fill in the appropriate details for that Item.

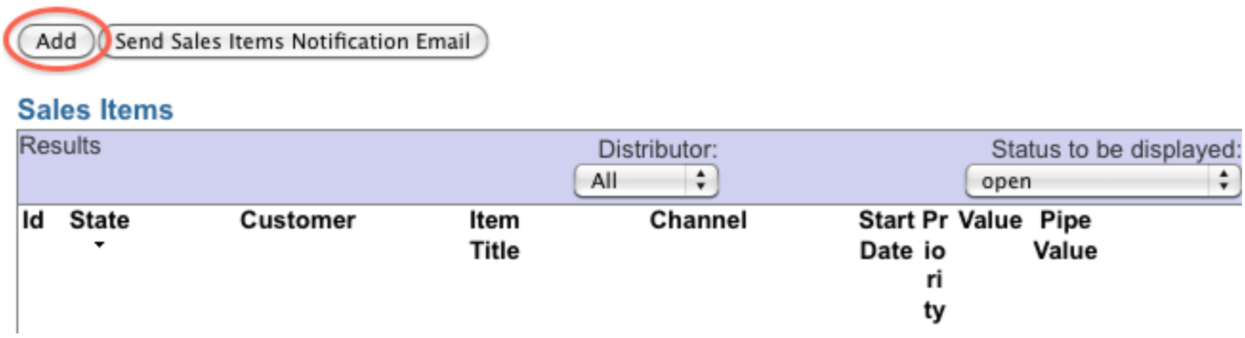


Fig 2.5-2 Adding a new Sales Items

3) Select a pre-entered customer from the drop down list for which the Sales Items will relate to. (Customer is entered into SIMPLer prior to opening a sales item).

4) Select the Sales Team member who will be the overall contact for the Sales Item.

5) Assign a Value to the Sales Item.

6) Assign a Title to the Sales Item.

7) The Date Reported field will automatically select the present date unless another date is defined.

8) The Reported by field will automatically select the User that is entering the Sales Item unless another name is defined.

9) Select the state of the Sales Item from the drop down list to represent its current progress. The Sales Tracking feature allows an operator to specify a Sales Value which is then equated to a Pipeline value according to the current state of Sales Item.

10) A description maybe given to the Sales Item by entering text into the description field. This may include anything from special customer requirements to information about the particular Sales Item.

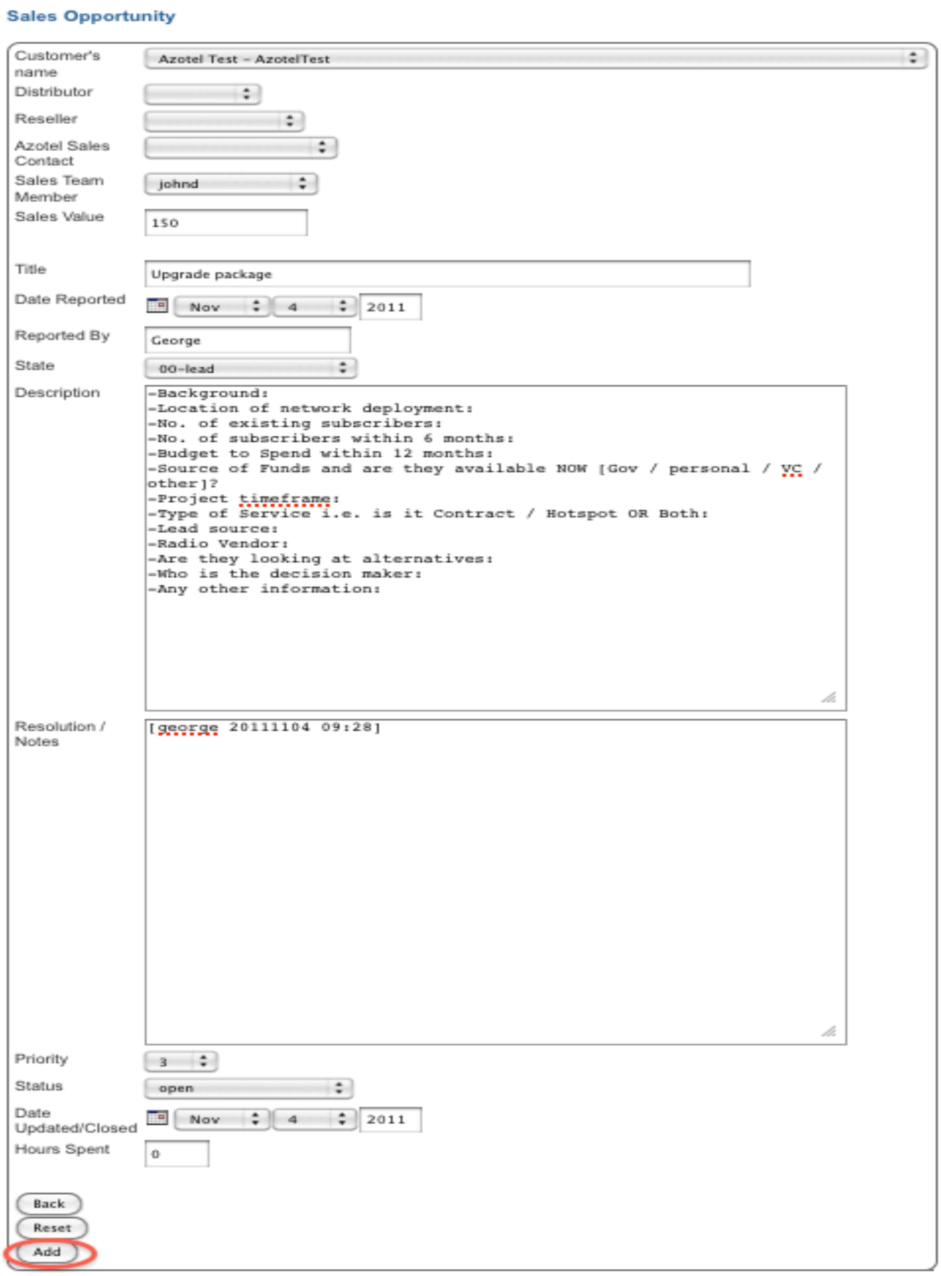


Fig 2.5-3 Sales item Input sheet

11) A Priority can also be defined for the Sales Item, so that all Items can be sorted according to their priority setting.

12) The status of the Sales Item can be set at this stage. This describes whether a Sales Item is Open, Closed, or Waiting for Customer. Once a Sales Item has been created, this status may be changed at any stage.

13) The Date Updated/Closed field will automatically default to the present date unless otherwise specified.

14) Once all the relevant information has been inputted, select the “Add” button in order to add the Sales Item record to SIMPLer.

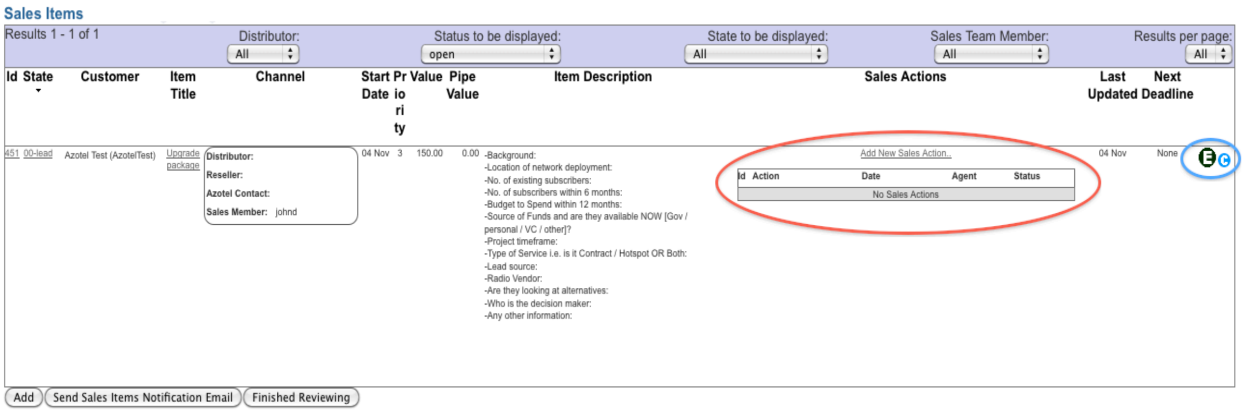


Fig 2.5-4 Sales Item Record

15) Once the Sales Item has been recorded, a Sales Action can then be assigned to it as shown above circled in red.

16) The sales item may also be edited at any stage, by selecting the “E” button on the right hand side of the Sales Item record.

17) The customer record for whom the Sales Item record applies to may also be view at any stage by simply selecting the “C” button

-2.6- Opening a Sales Action

1) Opening a Sales Action for a Sales Item can be done in two ways,
   i. Go to ***Customers → Sales Tracking → Sales Actions →Add* (Fig 2.6-1)**
   ii. Go to ***Customers → Sales Tracking → Sales Items→ Add New Sales Action* (Fig 2.6-2)**

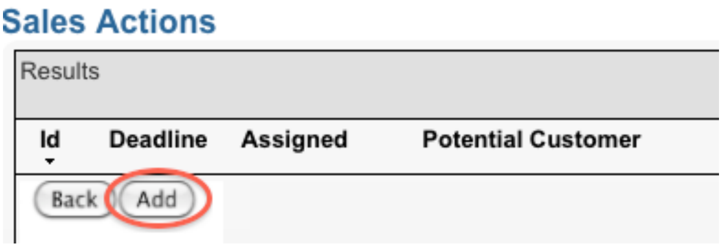


Fig 2.6-1 Adding a Sales Action from outside Sales Item record

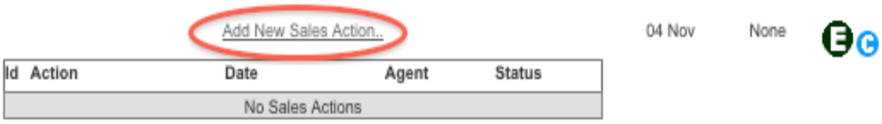


Fig 2.6-2 Adding a Sales Action whilst in a Sales Item

2) Next fill in the appropriate details regarding the new Sales Action.

Fig 2.6-3 Sales Action input page

3) Select the Sales Team member that the Sales Action will apply to. This can be any Sales Team Member that has been set up on SIMPLer and does not have to correspond to the Sales Team Member that the Sales Item was assigned to initially. For the purpose of this guide, johnd is selected as the Sales Team Member as shown in **Fig 2.6-3**.

4) Select the Sales Item that the Sales Action will apply to. If the Sales Action is added through the route ***Customers → Sales Tracking → Sales Actions →Add*** then the Sales Item will need to be specified. If the Sales Action is added through the route ***Customers → Sales Tracking → Sales Items→ Add New Sales Action*** then the Sales Item will automatically be specified.

5) A description can then be given to the Sales Action. This will generally describe what task the Sales Team Member must complete in relation to the specified Sales Item and may contain any other important information about the Action, i.e. if a customer would like to be called at a certain time as shown in **Fig 2.6-3**.

6) A Sales Team member fee may be outlined in the event that Sales Team Members work on a commission basis. However, this is not essential for the Sales Tracking aspect and may be left at the default option of 0.00 (EUR).

7) The Sales Action Opened Date is set to default to the present date unless otherwise defined, for the purpose of this guide; the Opened Date will be set to the 4thNovember 2011.

8) The Date Scheduled is the date on which the Sales Action should be completed. Similar to the Opened Date, this is set to default to the present date unless otherwise specified. For the purpose of this guide; the Date Scheduled will be set to the 5th November 2011, as seen in **Fig 2.6-3**.

9) The time for when the Sales Action should be completed can also be specified. This may not always be appropriate i.e. if a Sales Team Member is required to make a call to a potential Sales Lead, specifying a time for which to complete that action may be difficult due to a variety of reasons, however in regards to setting up a meeting/webinar, an exact time can be defined. The Time Schedule will automatically default to 00:00 unless otherwise specified, for the purpose of this guide, a time of 14:30 was specified to call "Customer", as this was the time requested by the customer as seen in **Fig 2.6-3**.

10) Finally in order to add the Sales Action to the Sales Item, select the "Add" button. The "Closed Date" and "Close Action Now" headings will be discussed in section -2.7- Closing a Sales Action.

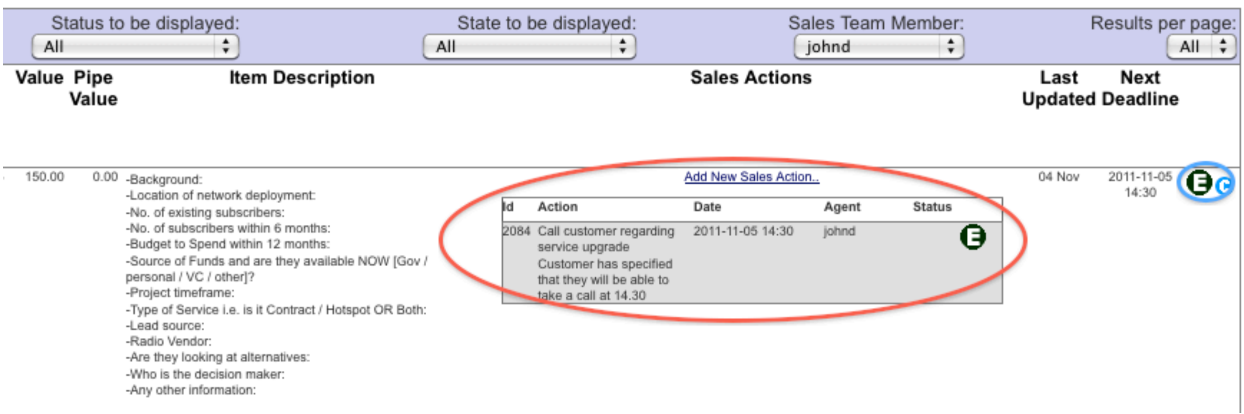


Fig 2.6-4 Sales Action Record and Next Deadline

11) The Sales Action is recorded under the Sales Action heading as shown in **Fig 2.6-4**, with the Description of the Sales Action, the Date and Time Scheduled and the Sales Team Member assigned to that action. Also, if multiple Sales Actions are specified then the date and time for the earliest open Sales Action will be shown under the "Next Deadline" Column. As there is only one action recorded in the above example, that deadline is shown.

12) A Sales Action can also be edited at any stage by clicking the "E" button within the Sales Action record as shown above.

-2.7- CLOSING A SALES ACTION

1) A Sales Action can be closed in two ways;
   i. Using the "Closed Date" in the Sales Action Input page.
   ii. Using the "Close Action Now" in the Sales Action Input Page.

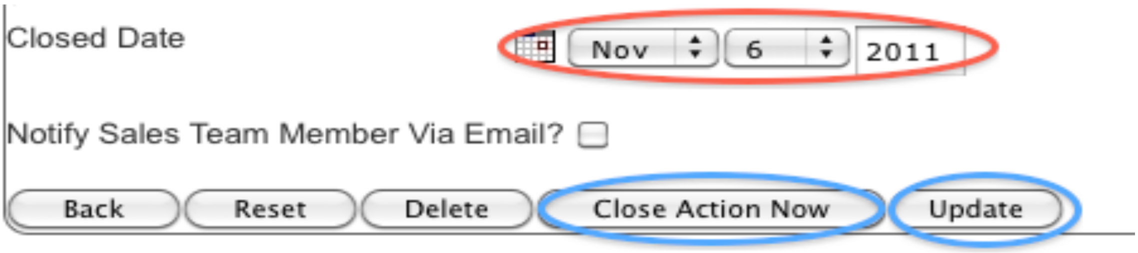


Fig 2.7-1 Closing a Sales Action

2) In order to close a Sales Action using the Closed Date field. A Date must be defined as shown above in **Fig 2.7-1.** For the purpose of this guide a date of the 6th November 2011 was defined. Once a Closed Date is set, press the "Update" button. The Sales Action will then be closed with the date showing the specified Closed Date.

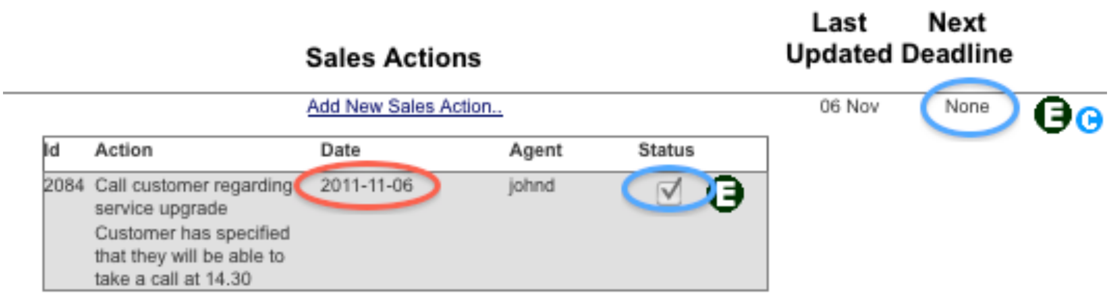


Fig 2.7-2 Closed Sales Action

3) A checked box under the Status heading denotes a closed Sales Action in order to represent that the Action has been completed. Also the Closed Date that was specified is shown under the Date

heading within the Sales Action record. Please not that there is no "Next Deadline" date, as the only Sales Action has been closed.

4) When using the "Close Action Now" button, the Sales Action will be closed with the closed date showing the present date on which the action was closed. Using the "Close Action Now" button will mean that no closed date needs to be specified. i.e. If the "Close Action Now" button is selected on the 10h November 2011, then the closed date will automatically be set to the 10th November 2011.

-2.8- Defining Pipeline Values

1) As discussed in section 2.5, when entering a Sales Item into SIMPLer, a monetary value can be assigned to each Item along with the Item's state, which is then equated to a Pipeline Value, according to predetermined Pipeline Values.

2) In order to change these pipeline values, go to **Settings → Sales Opportunity Types (Fig 2.8-1)**.

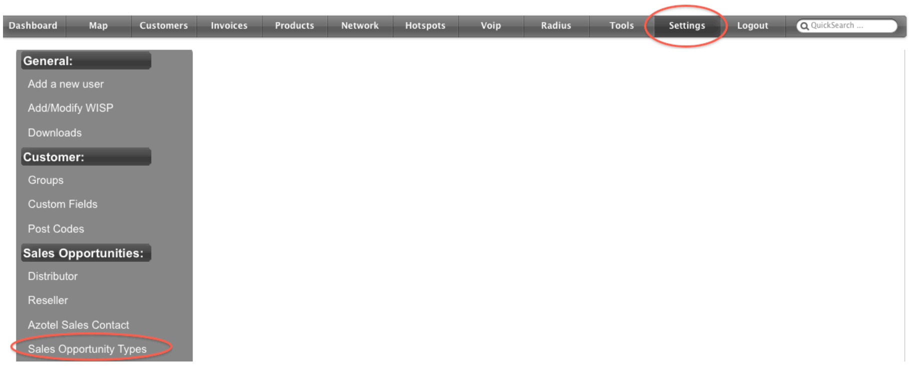
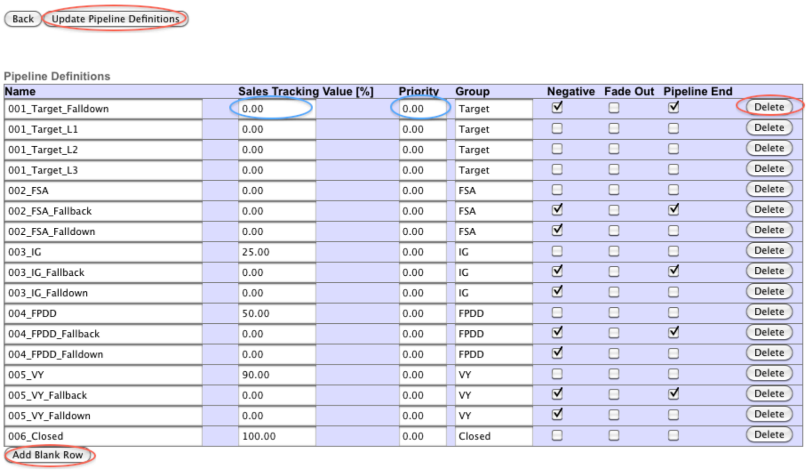


Fig 2.8-1 Accessing Pipeline Definitions

3) In order to add a pipeline definition, click the "Add Blank Row" button.


Back | Update Pipeline Definitions

Pipeline Definitions

Name	Sales Tracking Value [%]	Priority	Group	Negative	Fade Out	Pipeline End	
001_Target_Falldown	0.00	0.00	Target	☑	☐	☑	Delete
001_Target_L1	0.00	0.00	Target	☐	☐	☐	Delete
001_Target_L2	0.00	0.00	Target	☐	☐	☐	Delete
001_Target_L3	0.00	0.00	Target	☐	☐	☐	Delete
002_FSA	0.00	0.00	FSA	☐	☐	☐	Delete
002_FSA_Fallback	0.00	0.00	FSA	☑	☐	☑	Delete
002_FSA_Falldown	0.00	0.00	FSA	☑	☐	☐	Delete
003_IG	25.00	0.00	IG	☐	☐	☐	Delete
003_IG_Fallback	0.00	0.00	IG	☑	☐	☑	Delete
003_IG_Falldown	0.00	0.00	IG	☑	☐	☐	Delete
004_FPDD	50.00	0.00	FPDD	☐	☐	☐	Delete
004_FPDD_Fallback	0.00	0.00	FPDD	☑	☐	☑	Delete
004_FPDD_Falldown	0.00	0.00	FPDD	☑	☐	☐	Delete
005_VY	90.00	0.00	VY	☐	☐	☐	Delete
005_VY_Fallback	0.00	0.00	VY	☑	☐	☑	Delete
005_VY_Falldown	0.00	0.00	VY	☑	☐	☐	Delete
006_Closed	100.00	0.00	Closed	☐	☐	☐	Delete

Add Blank Row

Fig 2.8-2 Addition of Pipeline Definitions

4) Populate the blank row under the headings, Name, Sales Tracking Value [%] and Priority. For the purpose of this guide, "003-IG" (Information Gathering) was used as the name of the pipeline definition, 25% as the sales tracking value.

5) Pipeline definitions can also be deleted by clicking the delete button along side the chosen pipeline value.

6) In order to save the pipeline definitions, click on the "Update Pipeline Definitions" button, which will update any changes made to SIMPLer.

-2.9- Closing a Sales Item

1) Once all Sales Actions have been completed and closed for a given Sales Item, the Status of the Sales Item can be changed from Open to Closed, in order to specify which Sales Item have been finalized.

2) To close a Sales Item, go to **Customer → Sales Tracking → Sales Items**.

Fig 2.9-1 Closing a Sales Item

3) Click on the "E" button on the right hand side of the chosen Sales Item that is required to be closed.

4) Next under the Status heading, from the drop down list select the "closed" option and click "update" when ready. This will update the status of the Sales Item to closed.

Fig 2.9-2 Selecting Closed status from Sales Item record

5) All closed Sales Items can be view by selecting "Closed" from the drop down list under the Status to be displayed heading.

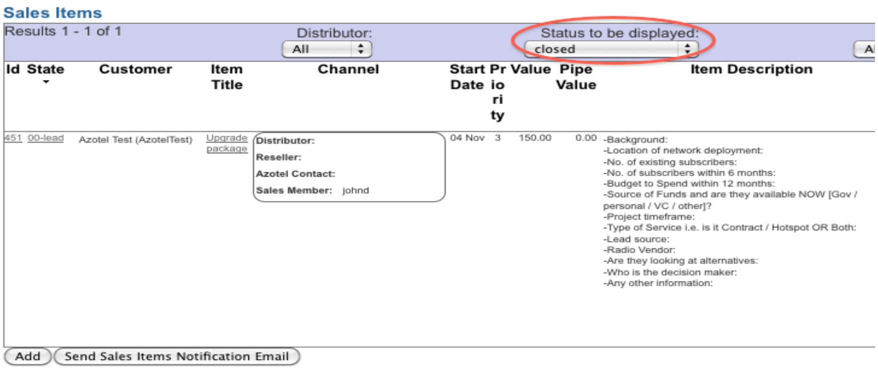


Fig 2.9-3 Display of all closed Sales Items.

-2.10- Email Notification of Open Sales Actions

1) There are two methods by which Sales Team Members can receive email notification of any open Sales Actions that are assigned to them.
   i. Daily automatic notification
   ii. Manual notification

2) In order to manually notify Sales Team members about open Sales Actions, go to **Customers → Sales Tracking → Send Email**, **(Fig 2.10-1)**.

Fig 2.10-1 Manual notification of Open Sales Items

3) In order to send a Sales Items email, the email address to which the notification will be sent must be specified.

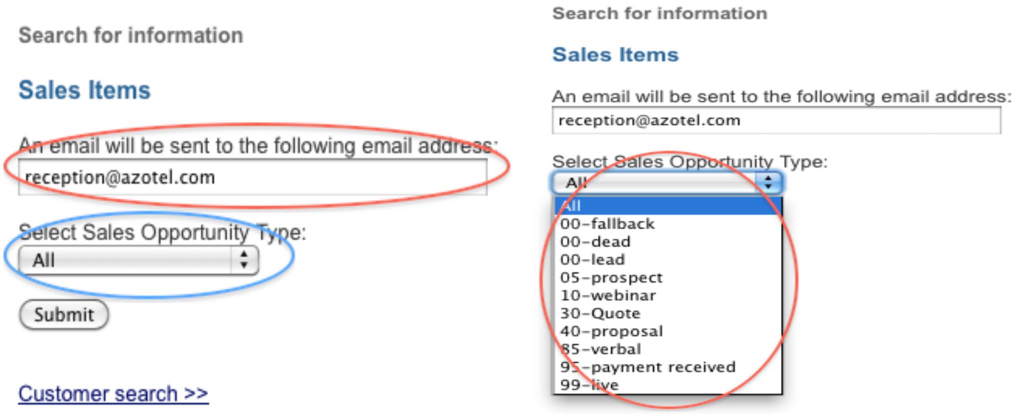


Fig 2.10-2 Email submission for Email Notification

4) Next the Sales Item Type can be specified, so that the report received by the Sales Team Member can contain all Sales Actions or Sales Actions with states, lead, prospect, proposal etc.

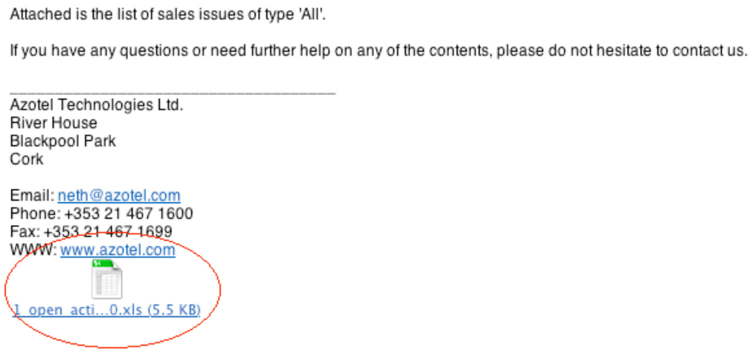
5) In order to send the email notification, click the "Submit" button.

6) The drawback of using the manual email notification process is that there is no control over the overall content of the email that is sent to the specified email address, and any Sales items as specified by the Sales Item Type will be sent to that email address regardless of whether all the items relates to that individual or not. If it is required to send a Sales Team member an email notification with only the Sales Items that relate to them then the automatic notification systems will be more appropriate.

7) For the automatic email notification for the Sales Tracking to work, an email address must be defined for each Sales Team Member according to Section 2.3 in this guide.

8) Once an email address has been defined, any open Sales Action that a Sales Team Member is assigned to will only be sent to that particular Sales Team Member daily, until all open Sales Actions for that Sales Team Member are closed, or there are no Sales Actions assigned to that Sales Member.

9) The email notification that the Sales Team Member will receive will be in the form of an excel report.


Attached is the list of sales issues of type 'All'.

If you have any questions or need further help on any of the contents, please do not hesitate to contact us.

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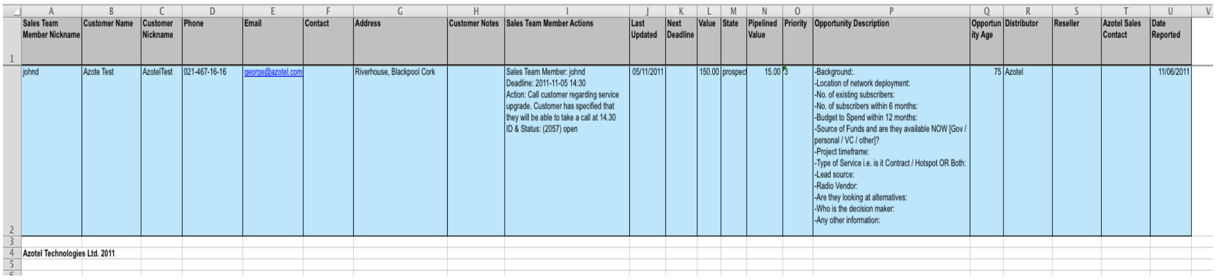
1_open_acti...0.xls (5.5 KB)

Fig 2.10-3 Example of Sales Notification Email

10) Once the excel attachment, as shown in **Fig 2.10-3,** has been opened, the Sales Team member will be presented with an excel spreadsheet outlining the main details of the Sales Items for which that Sales Team Member has open actions for.



Sales Team Member Nickname	Customer Name	Customer Nickname	Phone	Email	Contact	Address	Customer Notes	Sales Team Member Actions	Last Updated	Next Deadline	Value	State	Pipelined Value	Priority	Opportunity Description	Opportunity Age	Distributor	Reseller	Azotel Sales Contact	Date Reported
johnd	Azote Test	AzotelTest	021-467-16-16	george@azotel.com		Riverhouse, Blackpool Cork		Sales Team Member: johnd Deadline: 2011-11-05 14:30 Action: Call customer regarding service upgrade. Customer has specified that they will be able to take a call at 14.30 ID & Status: (2057) open	05/11/2011		150.00	prospect	15.00	3	-Background:. -Location of network deployment: -No. of existing subscribers: -No. of subscribers within 6 months: -Budget to Spend within 12 months: -Source of Funds and are they available NOW [Gov / personal / VC / other]? -Project timeframe: -Type of Service i.e. is it Contract / Hotspot OR Both: -Lead source: -Radio Vendor: -Are they looking at alternatives: -Who is the decision maker: -Any other information:	75	Azotel			11/06/2011
Azotel Technologies Ltd. 2011																				

Fig 2.10-4 General Layout of Sales Item report

11) This will outline;

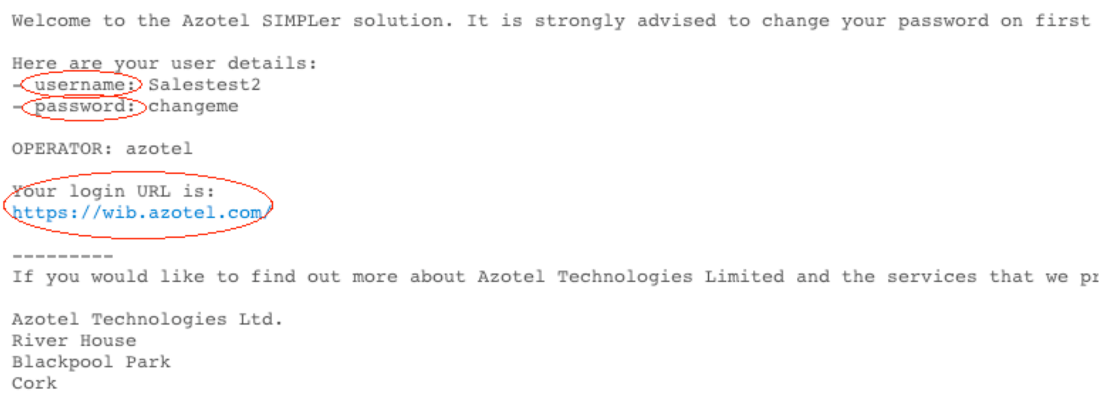
- **Sales Team Member Nickname**
- **Customer Name**
- **Customer Nickname**
- **Phone**
- **Email**
- **Contact**
- **Address**
- **Customer Notes**
- **Sales Team Member Actions**
- **Next Deadline Date**
- **Value**
- **State**
- **Pipelined Value**
- **Priority**
- **Opportunity Description**
- **Opportunity Age**
- **Distributor**
- **Azotel Sales Contact**

- **Last Updated**
- **Date reported**

-3- SIMPLer Sales Tracking Functionality for Sales Team Members

-3.1- Sales Team Member access to Sales Tracking Feature

1) When a Sales Team Member is set up on SIMPLer as a User, they will receive an Email outlining their Username, password, their administrator operator and their login URL.



```
Welcome to the Azotel SIMPLer solution. It is strongly advised to change your password on first

Here are your user details:
- username: Salestest2
- password: changeme

OPERATOR: azotel

Your login URL is:
https://wib.azotel.com/

---------
If you would like to find out more about Azotel Technologies Limited and the services that we pr

Azotel Technologies Ltd.
River House
Blackpool Park
Cork
```

Fig 3.1-1 Example of email received with Login details for SIMPLer

2) When a Sales Team Member clicks on the Login URL as shown in Fig 3.1-1, they will be redirected to the SIMPLer Login page (**Fig 3.1-2**).

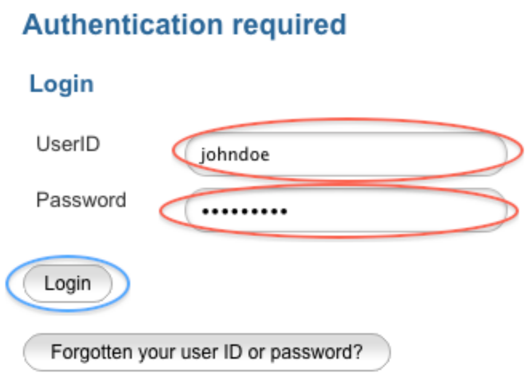


Fig 3.1-2 Entering Login Details for Sales Team Members

3) Once directed to the Login page, fill in the appropriate details i.e. UserID (Username) and Password as outline in **Fig 3.1-1**, and select the "Login" button.

4) The Sales Team Member will then be prompted to change their password given that it is their first login, but this will only need to be done once.

5) Fill in the new password where instructed and select "Update".

Fig 3.1-3 Password Change for first Login

6) The Sales Team Member will then be redirected back to the initial login page as seen in **Fig 3.1-2**, where they will be required to re-enter their UserID and new password in order to access the Sales Tracking feature on SIMPLer.

-3.2- SALES TEAM MEMBER'S USER RIGHTS ON SIMPLER

1) Following the Sales Team Member User setup stage in section 2.1 of this guide, Sales Team Members will have limited usability of SIMPLer according to the User rights assigned to them. This will limit their view to only the Sales Tracking feature as shown in **Fig 3.2-1**

2) In order to access the Sales Item records on SIMPLer, go to **Customers → Sales Tracking → Sales Items (Fig 3.2-1)**.

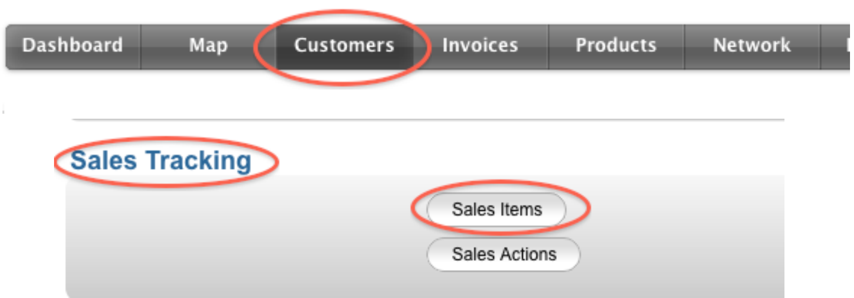


Fig 3.2-1 Access Sales Items in SIMPLer

3) This will only allow the Sales Team Member to view any open Sales Item for which he has been assigned to or for which he has an open Sales Action.

4) Due to the User rights defined in section 2.1, a Sales Team Member will only be able to view the Sales Items that they have either been assigned to or have a closed/open action for **(Fig 3.2-2)**. They will not be able to see other Sales Team Members' Sales Items.

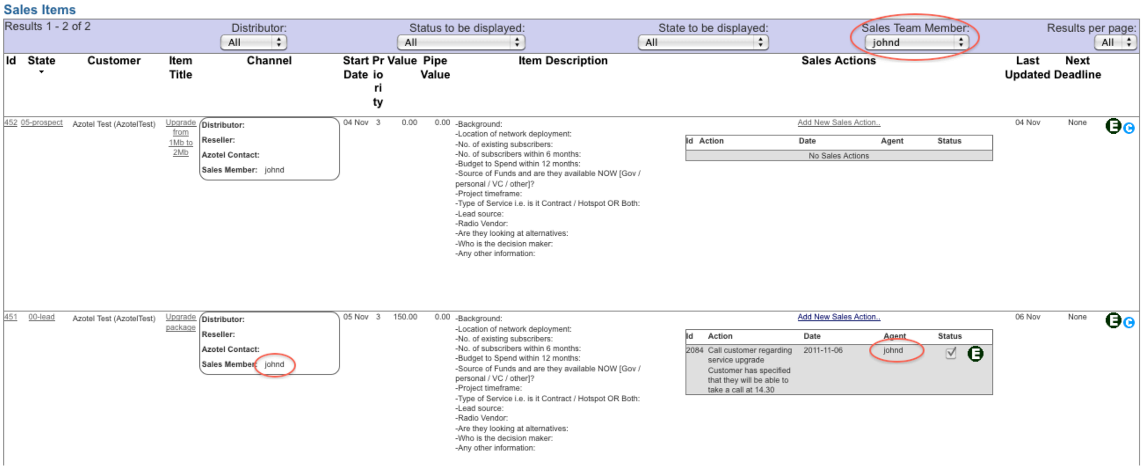


Fig 3.2-2 Display of Sales Items for a Sales Team Member

5) In order to access the Sales Actions Record, go to **Sales Tracking → Sales Actions**

6) Similar to the Sales Items records, Sales Team Members will only be able to view the Sales Actions that are associated with them and will not be able to view other Sales Team Members' actions.

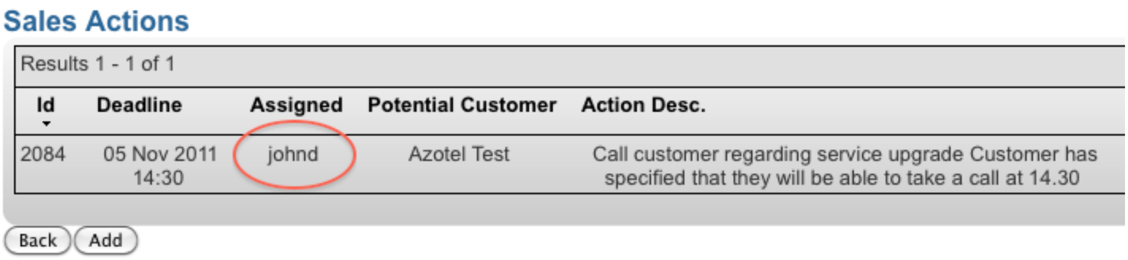


Fig 3.2-3 Sales Actions visible to assigned Sales Team Member

7) Finally in order to access the Sales Team Member details, go to **Sales Tracking → Sales Team.** This will allow Sales Team Members to change their own details if it is required to do so i.e. change of telephone number, change of email etc.

8) In order to change any details regarding Sales Team Members, press the "E" button on the right hand side of the screen to be redirected to the Modify Sales Team Member page.

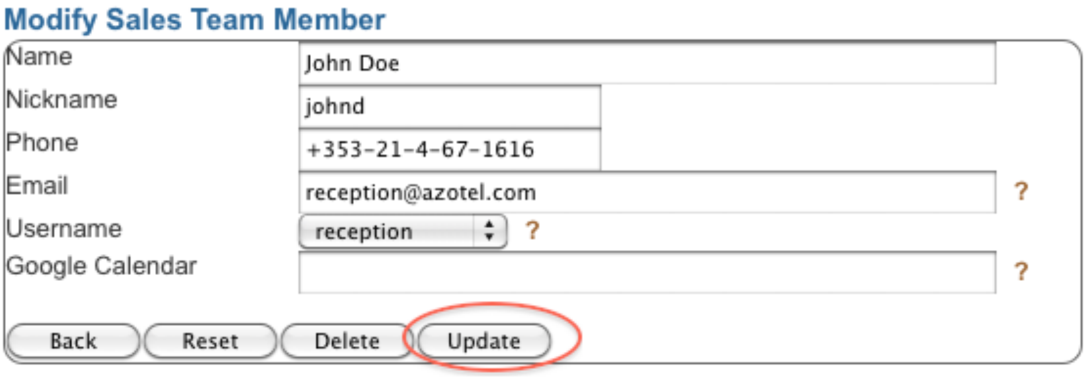


Fig 3.2-4 Modify Sales Team Member Page

9) Change any details that are required to be changed i.e. Phone number, Email etc., and select "Update" in order to save the changes.

-3.3- ADDING A NEW SALES ACTION TO A SALES ITEM

1) In order for a Sales Team Member to open a Sales Action for a given Sales Item, the steps are outlined in section 2.6 of this guide. (Note that there are a few exceptions in relation to Sales Team Members).

2) If a Sales Team Member is adding a Sales Action through the route ***Customers → Sales Tracking → Sales Actions →Add***, then they will only be able to add a Sales Action to a Sales Item for which they have a pre-existing Sales Action.

3) If a Sales Team Member is adding a Sales Action through the route ***Customers → Sales Tracking → Sales Items→ Add New Sales Action,*** then the Sales Item will have already been set to default to that Item.

-3.4- CLOSING/MODIFYING A SALES ACTION

1) Closing a Sales Action is outlined in section 2.7 of this guide.

2) Sales Team Members will only be able to close the Sales Actions to which they have been assigned. Sales Team Member will not be able to close any other Sales Actions relating to other Sales Team Members.

3) Updating a Sales Action can be done in two ways;

    i. Go to ***Customers → Sales Tracking → Sales Actions →"E"***
    ii. Go to ***Customers → Sales Tracking → Sales Items→ Sales Action →"E"***

4) Once the edit "E" button has been pressed the Sales Team Member will be directed to the Modify Sales Action page.

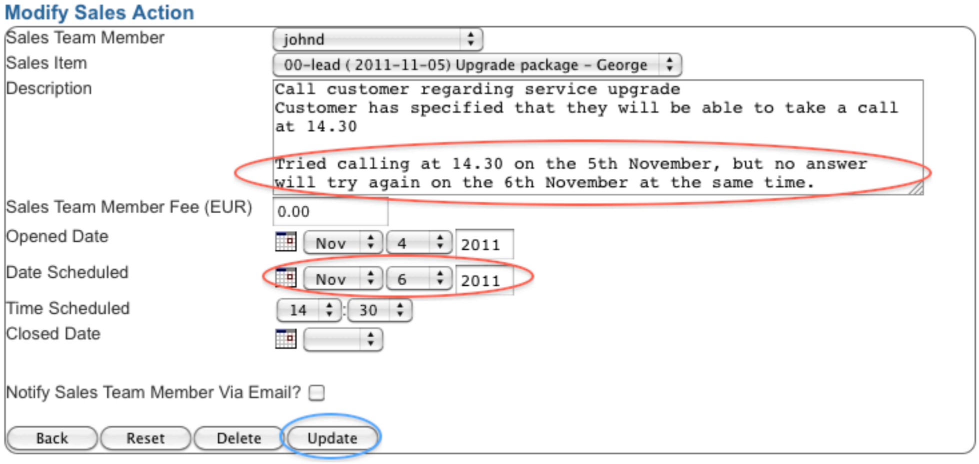


Fig 3.4-1 Modify Sales Action Page

5) From the example below, the Sales Team Member has updated the description of the Sales Action, as he was unable to contact the Customer at the time specified. He has stated that he was unable to contact them and that he will contact them at the same preferred time on the next day.

6) As well as updating the description of the Sales Action, the date scheduled can also be updated to reflect the added description within the Sales Action

7) Selecting the "Update" button will then save these changes and update the Sales Action within the Sales Item record.

Fig 3.4-2 Modified Sales Action

8) From the example above, it can be seen that the date and next deadline have been updated to reflect the modified date and the Action description has been updated.

-3.5- Closing a Sales Item

1) The steps for closing a Sales Item are outlined in section 2.9 of this guide.

2) Similar to sections 3.3 and 3.4 of this guide, Sales Team Members will only be able to close the Sales Items for which they have Sales Actions assigned to them.

-3.6- Enhanced Total Reports – Salesman Filters

There is a feature in SIMPLer under the Invoices -> Totals section, which allows operators to filter all the reports by sales personnel:

- Value Added Reseller
- Master Agent
- Regional Sales Manager
- Salesman

Selecting one of the above and clicking the "Generate" button will generate figures regarding customers who belong to the selected sales representative.

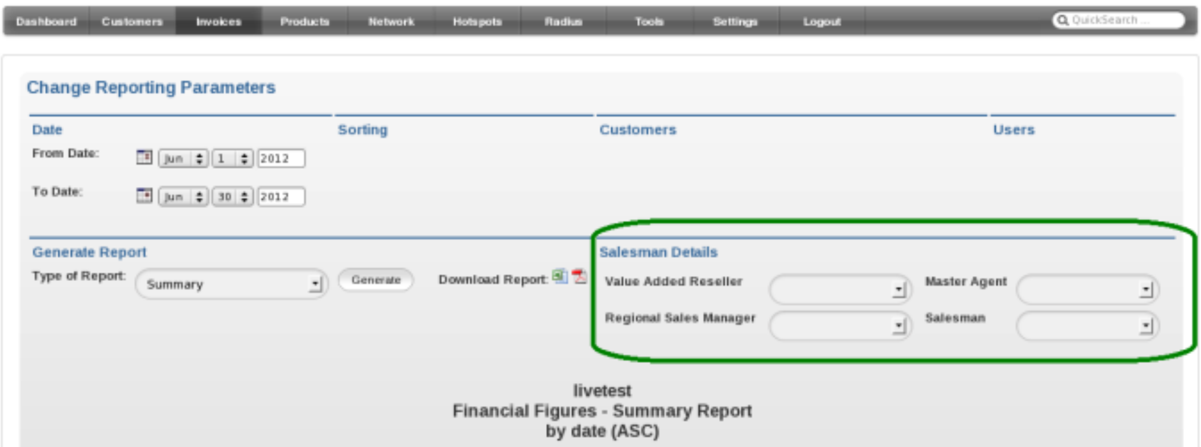


Fig 3.6-1 Salesman Details

-4- Quotes

A new feature has been added to the SIMPLer platform that allows operators to add quotes to customer accounts. This has been added to aid the sales process. Quoting in SIMPLer is similar in many ways to invoicing with the difference being that quotes themselves do not take part in the financial processes. However, quotes can be used at a later date to generate a **custom** invoice.

-4.1- Access to Quotes

There are some user rights associated with the quotes functionality. Check with your administrator if you have the rights required to use the feature.

- access: Allows users to access the quotes pages, and to view quotes.
- add: Allows users to add quotes of their own.
- modify: Allows users to modify quotes.
- delete: Allows users to delete quotes.

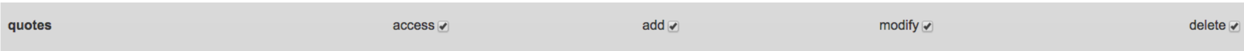


Fig 4.1-1 User Rights pertaining to Quotes

The quotes list is accessible from a number of areas in SIMPLer:

1) ***"Quotes"*** link in the ***"Sales Tracking"*** section of the ***"Customers"*** page. This link will re-direct the operator to a quote search page as presented on Fig 3-1-2. The page will allow operators to browse quotes using various parameters, to download the quote PDF file, to view quote change history or to visit the associated customer account.

Fig 4.1-2 Sales Tracking - Quotes

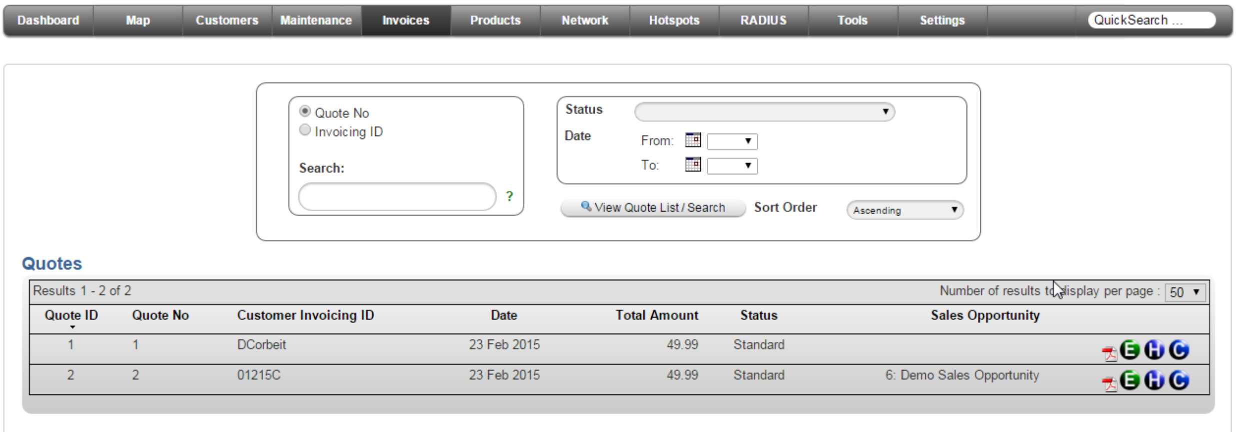


Fig 4.1-3 Invoices – Quotes

2) "Quotes" link from ***"Search"*** section of ***"Invoices"*** page. This link takes to the quote search page as presented on Fig 1-3 that allows the operator to browse quotes using various parameters, download quote PDF file, view quote change history or to access the associated customer account.

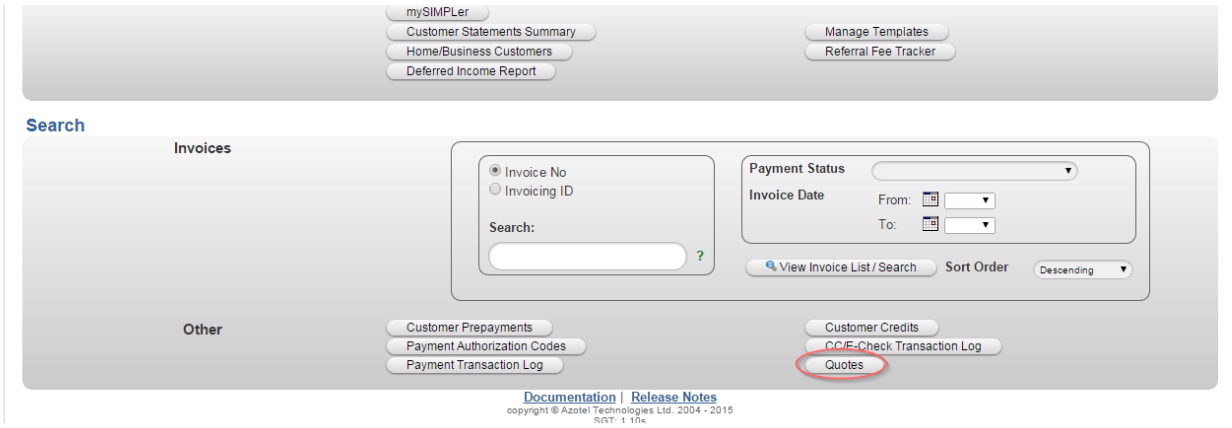


Fig 4.1-4 Invoices – Quotes

3) "Quotes" section of the "Sales Items" (Sales Opportunities) page. This section allows operators to add quotes to particular sales items.

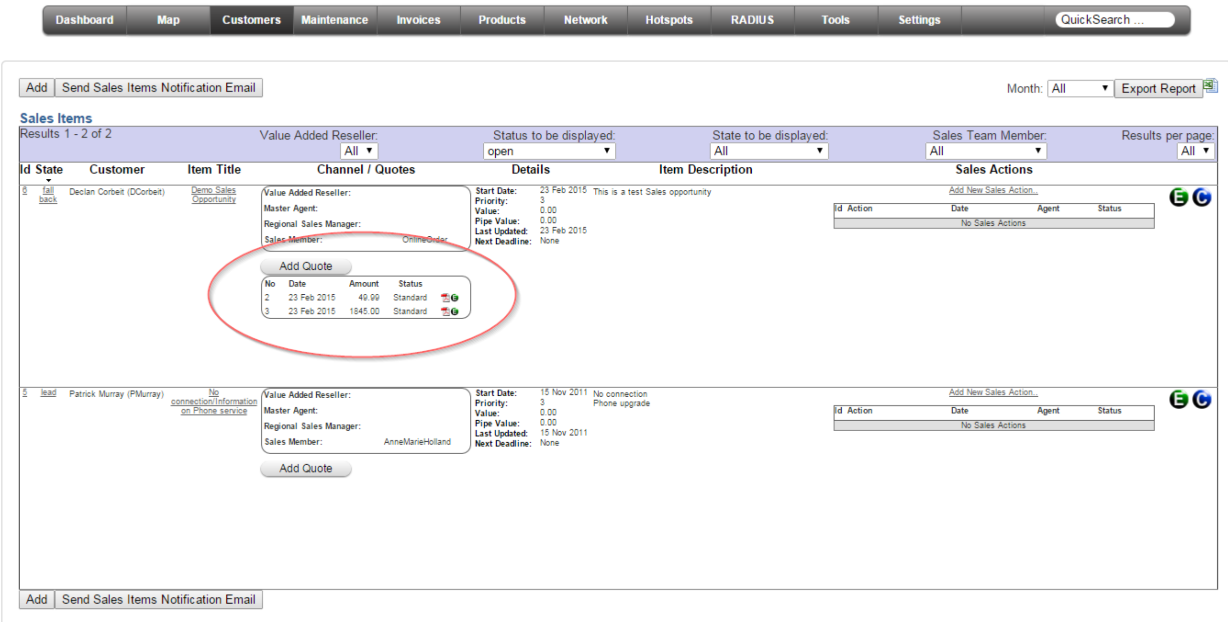


Fig 4.1-5 Sales Items – Quotes

4) Last 5 Sales Opportunities" section of ***"Customer Details"*** page. This section allows operators to add quotes to particular sales items directly from the customer details page.

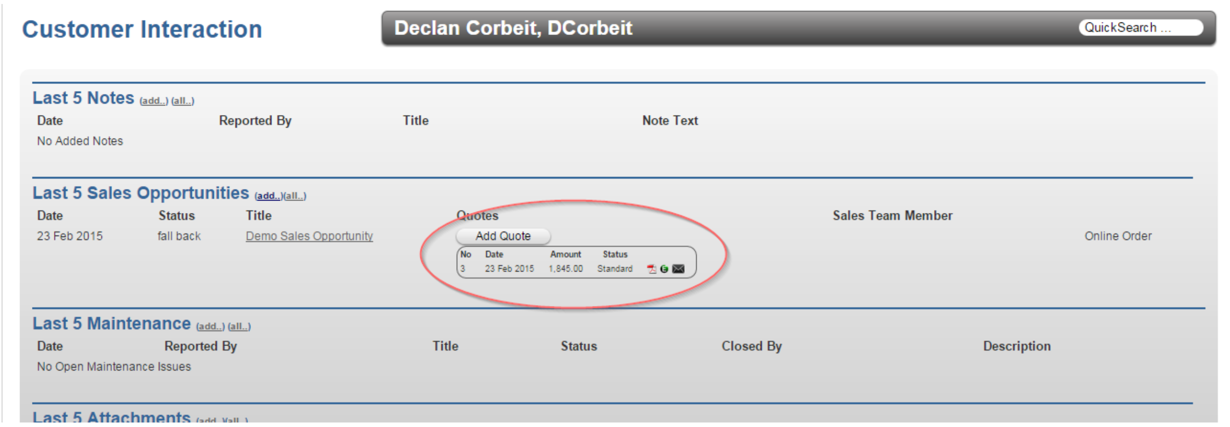


Fig 4.1-6 Last 5 Sales Opportunities

5) "Last 5 Quotes" Section of ***"Customer Details"*** page. This section allows to add quotes to a customer account.

Fig 4.1-7 Last 5 Quotes

6) "Quotes" button from the left menu on the customer details page, as shown in Fig. 4.1-8.

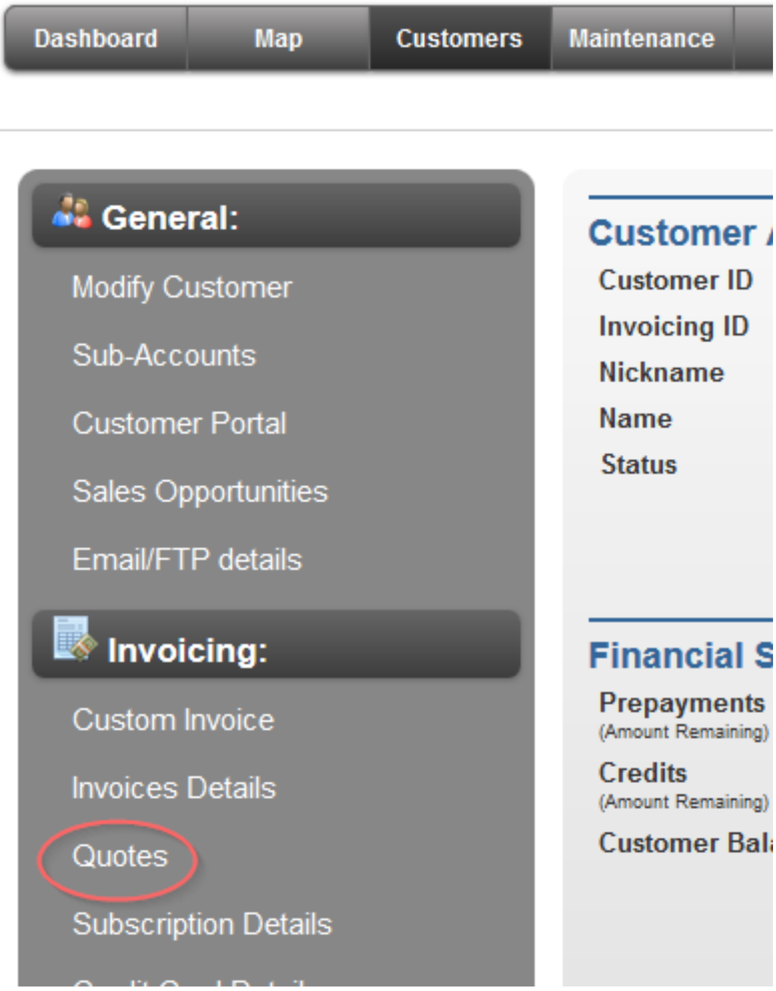


Fig 4.1-8 Customer Menu - Quotes

-4.2- QUOTES OVERVIEW

All quotes contained in the SIMPLer system are maintained within a database. The following is a list of the main quote attributes:

- ***Quote No.*** – the main and unique quote identification field. This field does not have to be a number. It can be prefixed with any combination of letters, numbers, or symbols but must end in a number. Examples are:
    - 1, A192, XNS201
    - 2006/02/234
    - OPER/06/1
- ***Customer*** (Invoicing ID / Name) – lists customer account details for the quote issued.

- ***Quote Date*** – date of quote generation (if not overridden). Note: quotes can be generated in advance or after their quote date if desired.
- ***Status*** - indicates the current status of the quote. Operator can define his own set of statuses for each quote that matches his sales process. By default there is only one "Standard" status.
- ***Total Net Amount*** – quote net amount (excluding VAT/Tax)
- ***Total Tax Amount*** - VAT/Tax rate (represented as a percentage) used in calculating amount of invoice.
- ***Total Amount*** - quote total amount (including VAT/Tax)

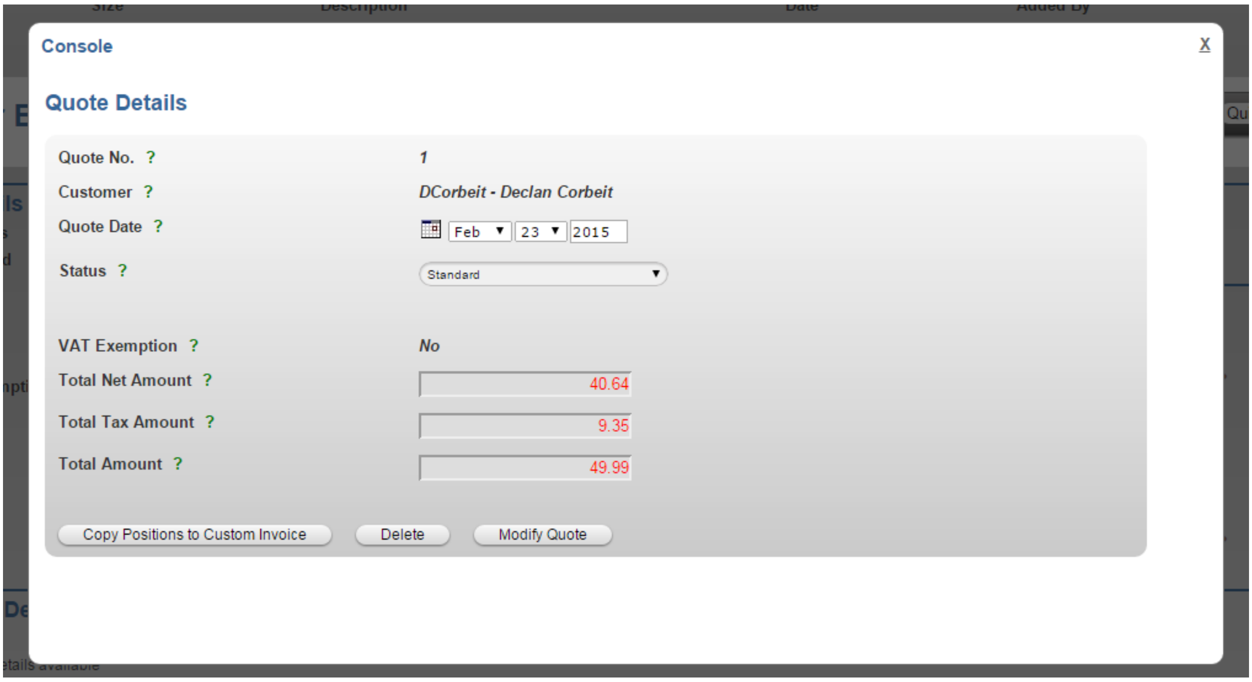


Fig 4.2-1 Quote Details Page

All of the above information can be readily accessed from the quote details page (fig. 4.2-1). This page can be accessed in a few ways (a) use the search form on the main *Invoices* (Fig. 1-4) *or Customers* page (Fig. 4.1-6) (b) from customers page (via Quotes details >> menu item as shown in Fig. 4.1-8) or by clicking on the E circle beside the invoice in “last 5 quotes” or "last 5 sale opportunities" section and (c) via *Sales Opportunities* page (Fig. 4.1-5).

The "Quote Details" page (fig 4.2-1) allows the user to modify certain data from existing quotes, examples are date and quote status. Every other field is locked down after the quote has been created. Fields that cannot be changed include Quote No, Customer, Quote Date, Total Net Amount, Total [TAX] Amount, Total Amount and Positions.

It is also possible to delete a quote. When trying to delete a quote the user will be prompted to confirm his/her actions.

Quotes can also be used to generate a CUSTOM invoice by clicking the "Copy Positions to Custom Invoice" button.

-4.3- Create Quote

This facility allows the user to generate a quote for an end customer. This page can be accessed from the following parts of the system:

1) The customer details page by following the ***"add.."*** link from the ***"Last 5 Quotes"*** section

Fig 4.3-1 ***Add a quote link in the "Last 5 Quotes" section of customer details page***

2) The customer details page by following the "Add Quote.." link from the "Last 5 Sales Opportunities" section

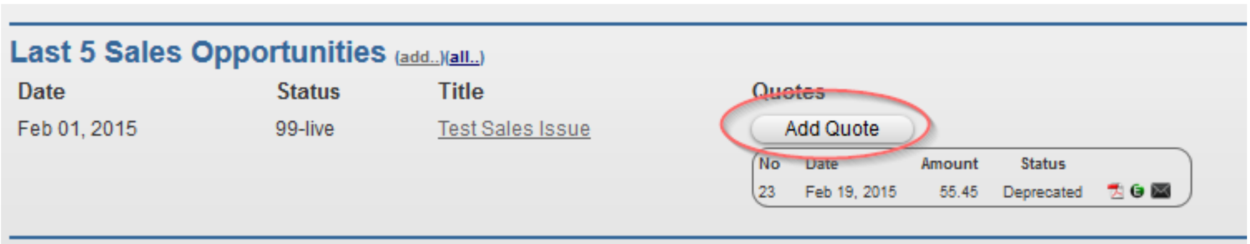


Fig 4.3-2 ***Add a quote link in the "Last 5 Sales Opportunities" section of customer details page***

3) The sales opportunity page by following the ***"Add Quote"*** button for an existing Sales Opportunity

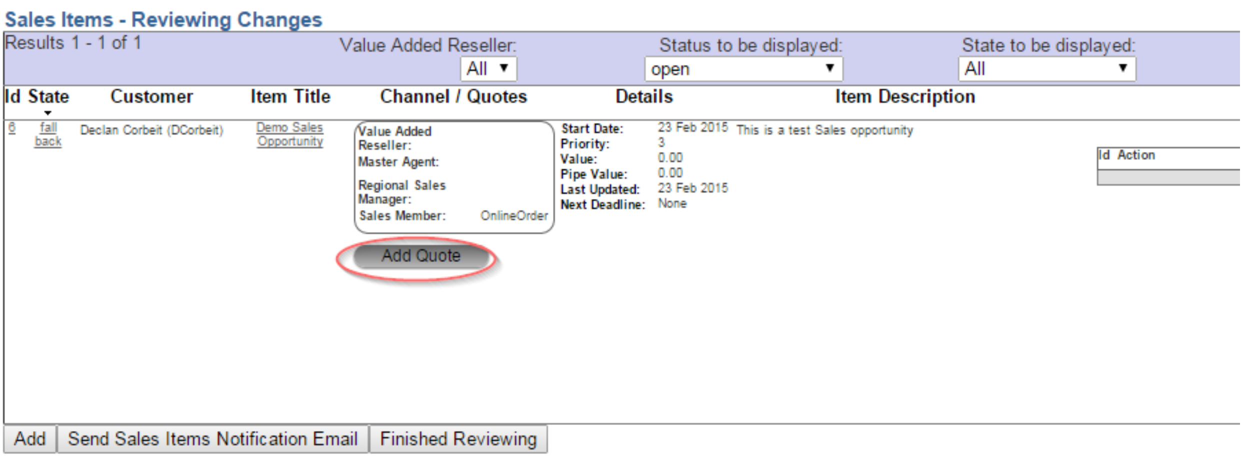


Fig 4.3-3 ***Add a quote link in the sales opportunities page***

The system will then automatically select the appropriate customer and Sales Opportunity, thereby limiting the possibility of errors.

The form consists of four parts: A general menu with a link back to the quote process page, Quote Details (top), Products (middle) and Quote Products (bottom) (fig 4.3-4).

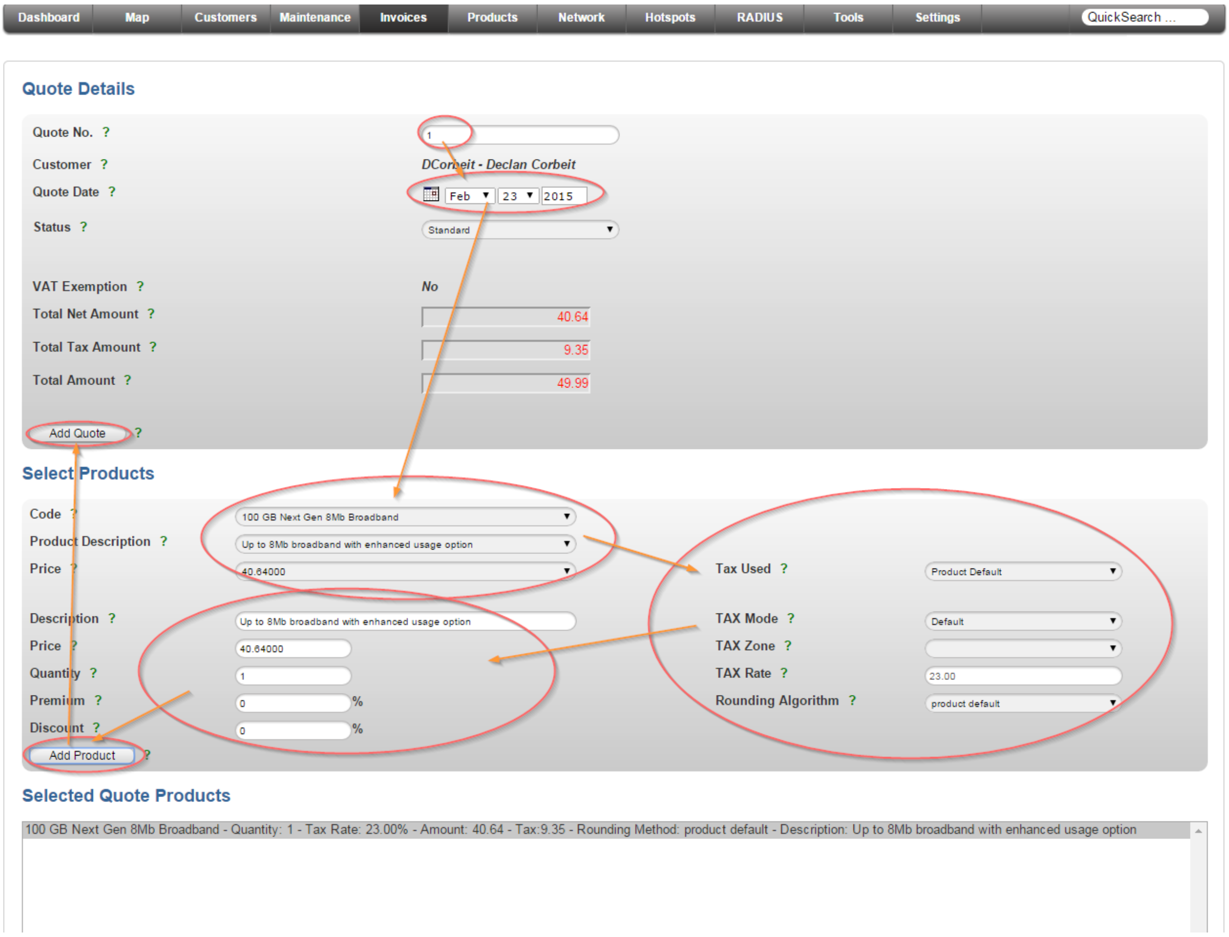


Fig 4.3-4 Add Quote Page

There are seven **mandatory** fields contained in the Quote Details section:

- ***Quote No*** – defaults to next available quote number
- ***Quote Date*** – default value: current date
- ***Status*** – default value: Standard

When issuing quotes, it is mandatory to add at least one product. This can be done under the Products section of the form. Fields under this section are as follows:

- ***Code*** – list of all active product codes
- ***Product Description*** (dropdown list) – detailed description of products
- ***Price*** (dropdown list) – prices for active products

NOTE: The above fields are linked. If you select a code the matching description and price will be automatically selected. The same is true when selecting based on description or price.

- ***Description*** (text field) – Modifiable product description
- ***Price*** (text field) – Modifiable product price
- ***Quantity*** – Number of products selected to add
- ***Premium*** – Percentage markup on product
- ***Discount*** – Percentage discount on product
- ***Tax Used*** – Specifies whether tax is taken from customer default settings or product default settings.
- ***Tax Mode*** – Default (as per global WISP settings), Flexible (as per defined Tax zone) or Fixed (can fix percentage on a per quote basis)
- ***Tax Zone*** – As per pre-defined tax zones.
- ***Tax Rate*** – Tax percentage applied to product. Defaults to product preset tax
- ***Rounding Algorithm*** – rounding method used to generate final price for product after apply premium, discount, and/or tax. Options include:
  - *product default*
  - *arithmetic*
  - *down*
  - *up*

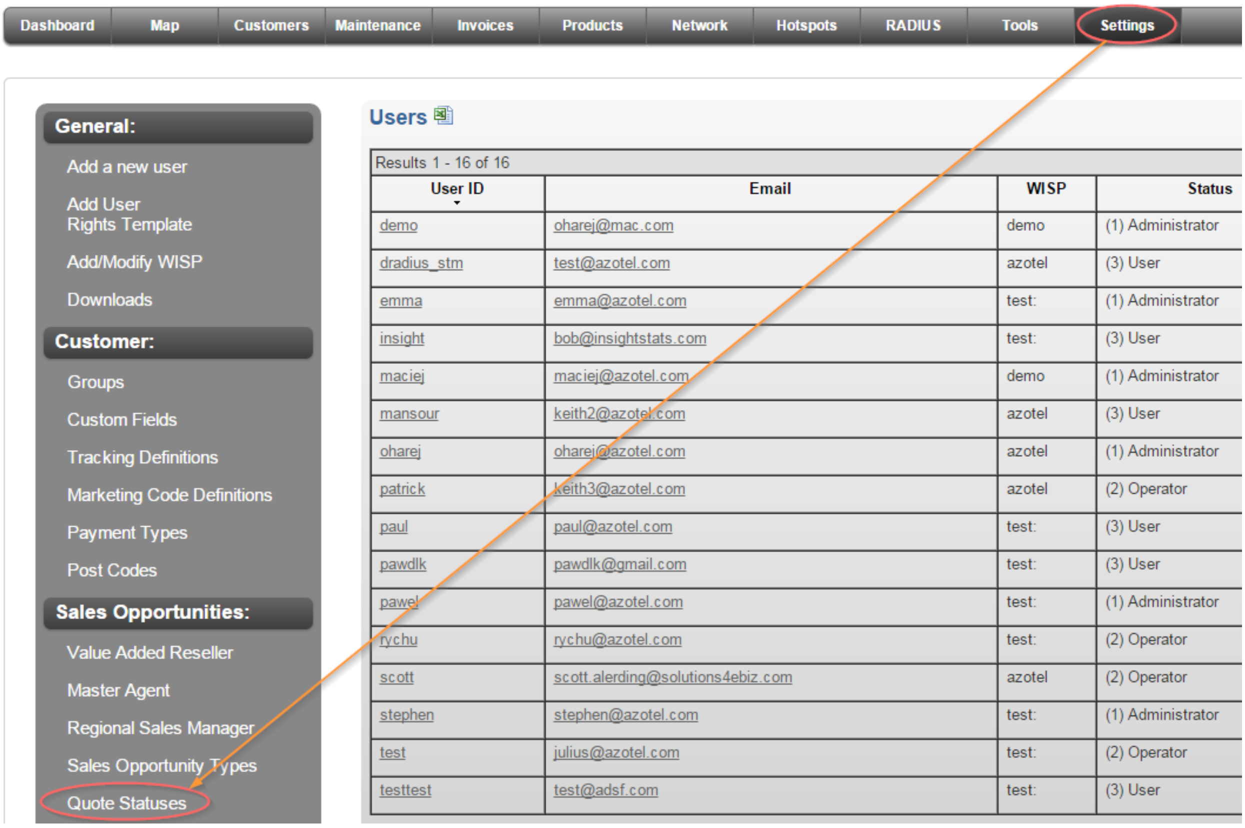
Products can be selected by choosing either their Code, Product Description, or Price. At this point the Description and Price text boxes will be automatically populated. The addition of the ability to edit a product's description/price on a per quote basis is key to the flexibility of quote generation.

After adjusting the different details, as required for the quote, click the Add Product button to add the details to the "Selected Quote Products" list. At this point the quote still will not have been created, as further verification is required. Multiple products can be added to the quote by selecting them from one of the dropdown list and clicking the Add Quote button again. If a product is added to the Selected Quote Products list in error the user only needs to select the erroneously added product in the list and then click the "Deleted Selected" button. When the appropriate products have been added to the list, and all general settings are correct, click the "Add Quote" button to generate the quote for the selected customer / sales opportunity.

If no products are added to the Quote Products list an error message is displayed preventing the quote from being generated.

-4.4- MANAGE QUOTE STATUSES

The operator can define/manage own list of quote statuses through the Quote Statuses page. It can be accessed from the "Quote Statuses" link under "Settings" page:



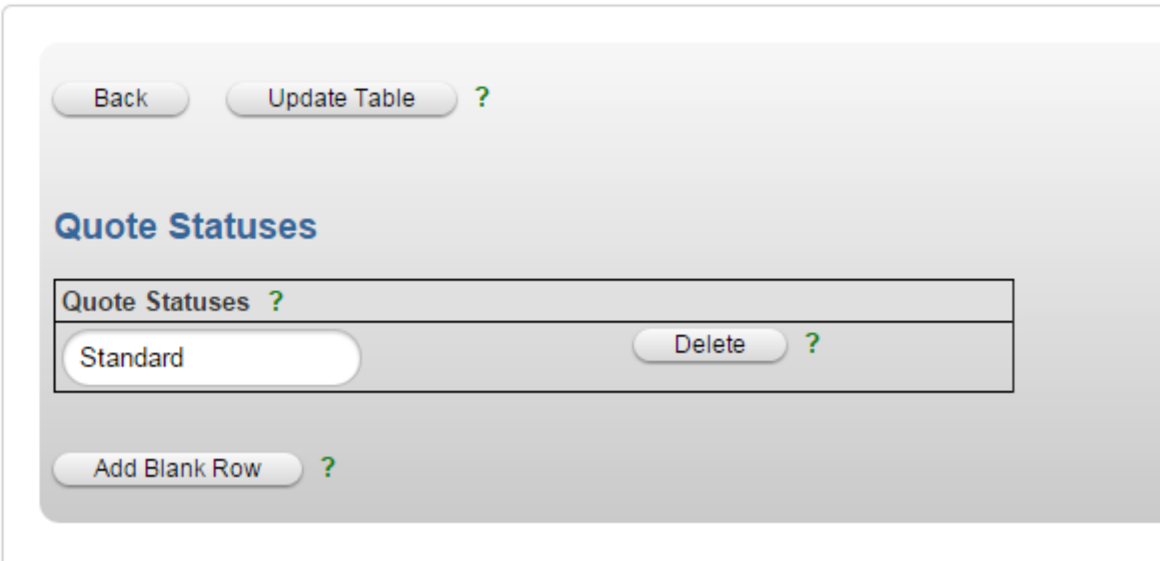


Fig 4.4-1 Quote Statuses Page

-4.5- TEMPLATES

Quote pdf files are created from HTML templates using the same approach as used with Invoices, statements, receipts etc.

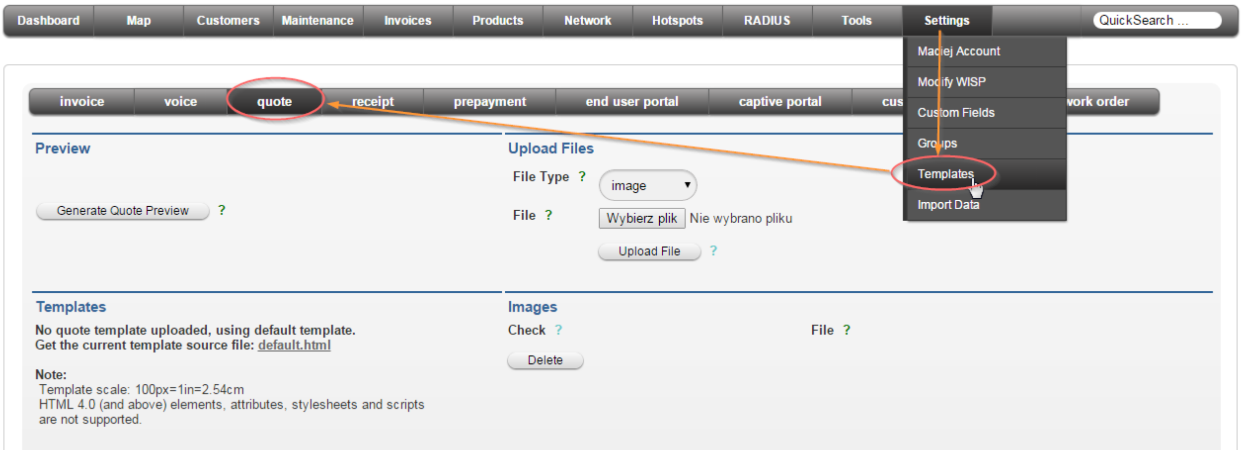


Fig 4.5-1 Quote Templates

ANNEX A: CHANGE HISTORY

Change history				
Date	**Author(s)**	**Subject/Comment**	**Old**	**New**
13/03/15	emma	Added Section Four - Quotes	n/a	100