BluWave CRM- Training Manual

For support please contact: 011 462 6871 or support@bluwave.co.za.

Other Manuals Available:

General:

- BluWave- Managing Users- SM006
- BluWave- HTML Signature- SM0001
- BluWave- Email Settings- SM0004
- BluWave- Document Management- SM0029
- BluWave- Importing Data- SM0013
- BluWave- Merging Companies- SM0015
- BluWave- List Manager- SM0002
- BluWave- Geo Location & Travel Claim- SM0010
- BluWave CRM- Product Attachment- SM0007
- BluWave- Sage One Integration- SM0026
- BluWave- BI Training Manual- SM0044

CRM:

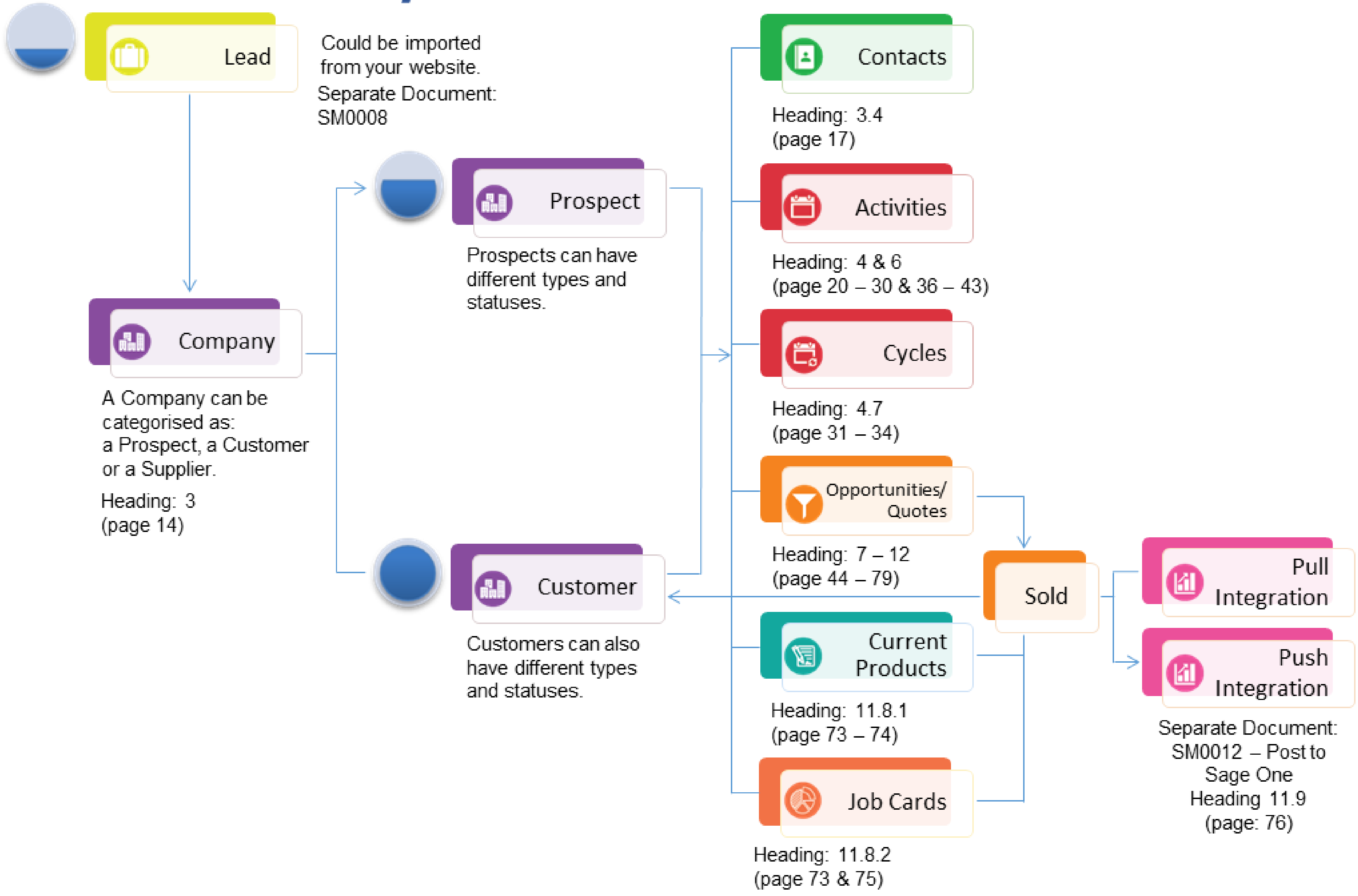
- BluWave CRM- Setup Manual- SM0020
- BluWave CRM- Training Manual- SM0018
- BluWave CRM- Leads Management- SM0008
- BluWave CRM- Copy Offer & Quote- SM0032
- BluWave CRM- Quote Cover Letters- SM0023
- BluWave CRM- Post to Sage- SM0012
- BluWave CRM- Managing Foreign Currencies- SM0028
- BluWave- Current Products- SM0003
- BluWave CRM- Cycles & Routes- SM0039
- BluWave CRM- Report Summary- SM0034
- BluWave CRM- Workflows- SM0016

Service:

- BluWave Service- Setup Manual- SM0021
- BluWave Service- Training Manual- SM0020
- BluWave Service- Keywords- SM0025
- BluWave Service- Escalations- SM0024
- BluWave Service- Sage Invoice Number to Job Card- SM0040
- BluWave Service- Mobile Job Cards- SM0033
- BluWave Service- Checklist Setup- SM0042

Table of Contents

System Process Overview



1. System Overview

At the top of the screen, the **Menu bar** will always be visible to the user. Clicking on each **Menu** will show a list of **options/pages** the user can go to.

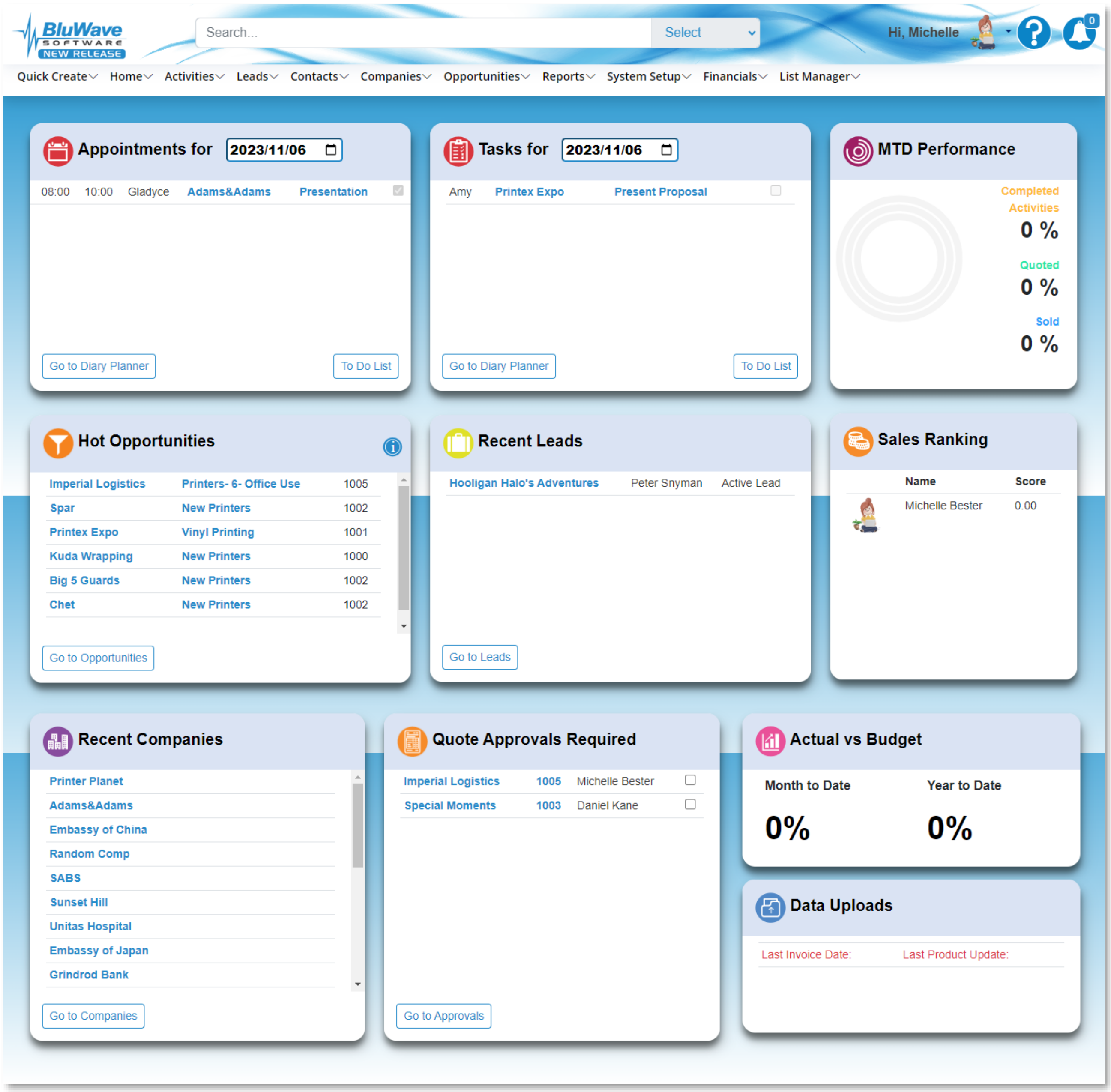
Home	The Home menu gives the user quick access to Appointments, Tasks, Recent Opportunities, New Leads, Recent Companies, and the Sales Pipeline. This menu give you access to: Home, Edit My Profile, Sales Performance and Active Pipeline pages.
Activities	The Activities menu is used for diary management. It allows you to add, view, or edit your appointments and tasks. Follow ups with prospects and customers are driven through this process. This menu give you access to: Diary Planner, To Do List, Add New Activity, Send Email, Add New Cycle & Cycle Planner pages.
Leads	The Leads page is used for loading and editing Leads that have not yet been qualified. Once contact is made with the leads, they can be converted to Companies (Prospects). Leads is designed to receive leads automatically from your website. To see how to do this see the Leads Web Service section in the Learning Centre on the BluWave website for more information. If you receive a qualified Lead (prospect) you can skip this process and load the prospect directly under companies. This menu give you access to: View and Add New Lead pages
Contacts	The Contacts menu allows you to view, add and edit contact people at a company. Specific information relating to a contact can be entered here, e.g Email address. NB! All contacts are linked to a company, a company name will be requested in order to add a contact person. You can also add contact people from the Companies Tab. This page will only show the contacts entered for Companies only and not for Leads. This menu give you access to: View and Add New Contact pages
Companies	The Companies menu is used to display and edit all relationship information about a client. From this page, you can view and edit a company’s contact list, history of activities, scheduled activities, and sales opportunities. Both Prospects (potential customers) and Customers can be seen here. This menu give you access to: View, Add New Company, Contract Pricing, Group Pricing, View cycles, Price List pages
Opportunities	The Opportunities page displays all active and inactive deals and allows you to view, add and edit potential sales. Each opportunity has a potential value, probability percentage, and expected order date. An opportunity requires a company and a contact person. The user can edit their opportunities on this page, update the sales status, filter, and sort any field in ascending or descending order. We have also added in a convenient Kanban view to move around the opportunities in the sales process. This menu give you access to: View, Add New Opportunity, Kanban view and Add New Quote pages.
Reports	The Reports page allows the user to access all the reports available in system. The reports are subjects to the user’s roles and can be saved to a PDF file. This menu give you access to: CRM and Service Reports and Push Reports Setup pages.
System Setup	The system setup page is used to edit and configure drop down lists to suit business requirements.

2. Home Menu

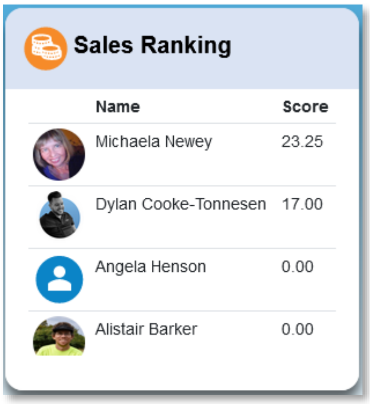
There are 4 pages accessible from the **Home** Menu: **Home, Edit My Profile, Sales Performance and Active Pipeline.**

2.1 Home Page

The **Home** page allows the user to view appointments, tasks, and opportunities. The user can also view recently added companies and a graphic display of their Month-to-date Performance and Sales Ranking.



The **Home** page now includes a few additional panels:



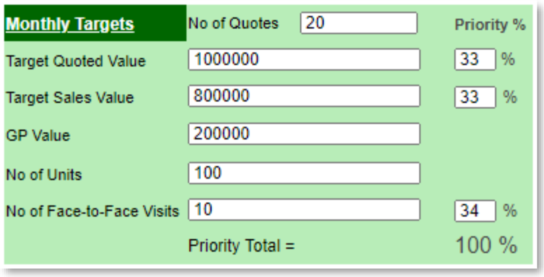
The **Sales Ranking** panel shows the ranking of the users in the same branch based on their achievements against their targets for:

- Completed Face-to-Face Activities
- Quoted Values
- Sold Quotes Values

This will be based on their targets and priority percentages set up on each user's profiles.

If these have not been set up, their score will show as 0.00.

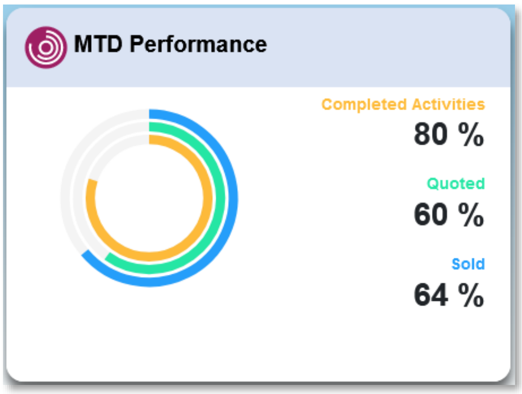
Example of the **Monthly Target** section with the priority % on the User Profile page:



Each of the abovementioned KPI's would need a % of priority assigned to it (all 3 should equal a 100%) which will then determine the users Sales Ranking score.

This can only be done by a System Admin.

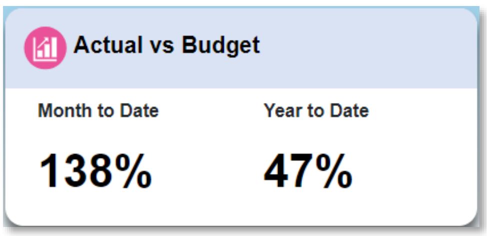
For a quick overview of targets reached, we have also added the **MTD (Month to Date) Performance** panel.



This panel shows the percentage of the target reached by the user as set up in the user's profile:

- % of face-to-face activities that were completed
- % of Target Quoted Value reached
- % of Target Sales Value reached (based on closing an opportunity/quote- not from invoice lines imported)

The **Hot Opportunities** panel will show a ranked list of opportunities logged by the user. This list is ranked by hottest status and then value.

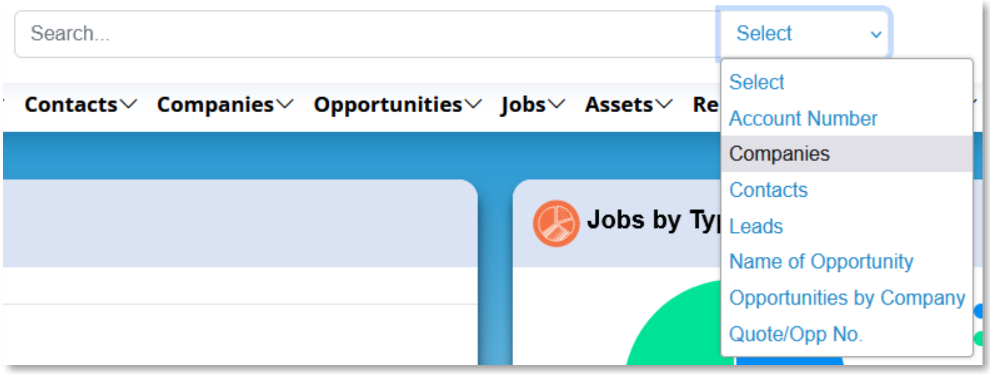


The **Actual vs Budget** panel will show the % of the budget the user has reached with their sales.

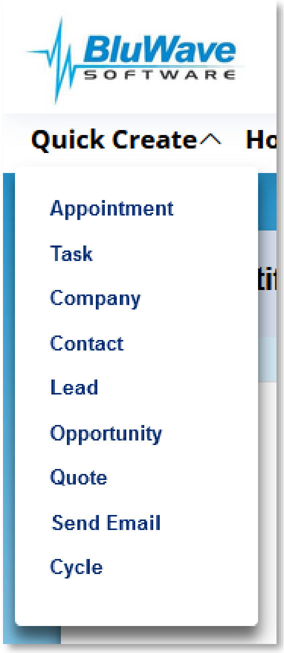
This will only populate if the user has a budget figured associated with their rep code and BluWave is integrated with an accounting package.

2.1.1 Search, Quick Create & Calendar

The **Search Field** allows the user to search throughout the system, by clicking on the dropdown, and selecting where they would like to search.



The system also allows for a wildcard (%) in the search fields. This will search for a string of characters anywhere in the selection, for example "%con" will return "construction", "consolidated" and "teleconference"



The **Quick Create menu** on the left of the **Home** page acts as a short cut to navigate to relevant screens within the system to create (for example) a new appointment, task company, lead, or opportunity.

2.2 Edit User Profile

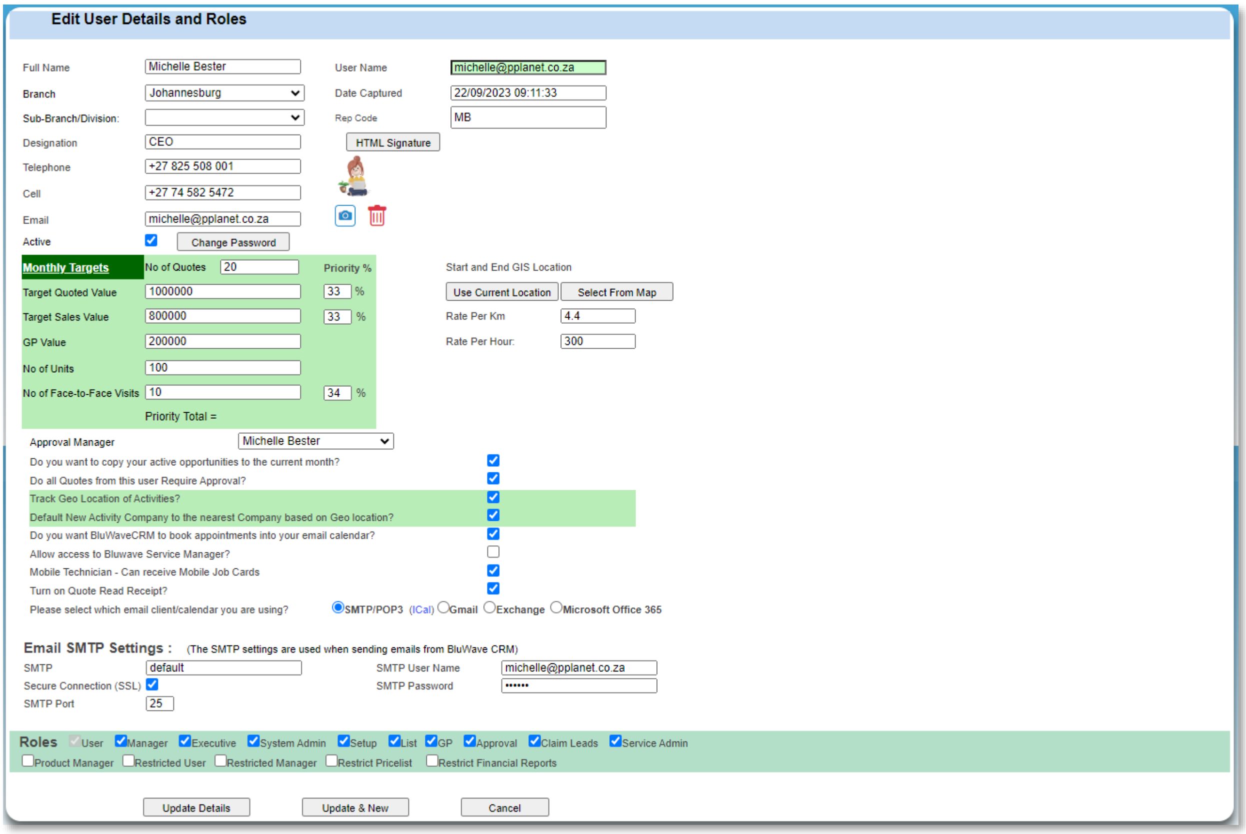
This page allows the user to access their personal details and allows them to change their passwords and add their HTML signature for emails. This page is accessed from either the **Edit My Profile** sub tab on the home tab or from the **User Profile** link on the top right of the page.

On this page, the user can specify if they want to activate Google Mapping on face-to-face activities; the user also has the option to default the company on new activities to their closest client; and whether they want the system to post appointments to their Email calendar. Specify whether the user is using a local calendar e.g. Outlook or a web-based calendar e.g. Gmail by selecting the appropriate radio button.

Enter the relevant Email Settings, Username and Password on this page to allow sending of emails from BluWave CRM. (Note: Remember to update regularly in order to ensure that BluWave will be able to send emails and post appointments to their calendar)

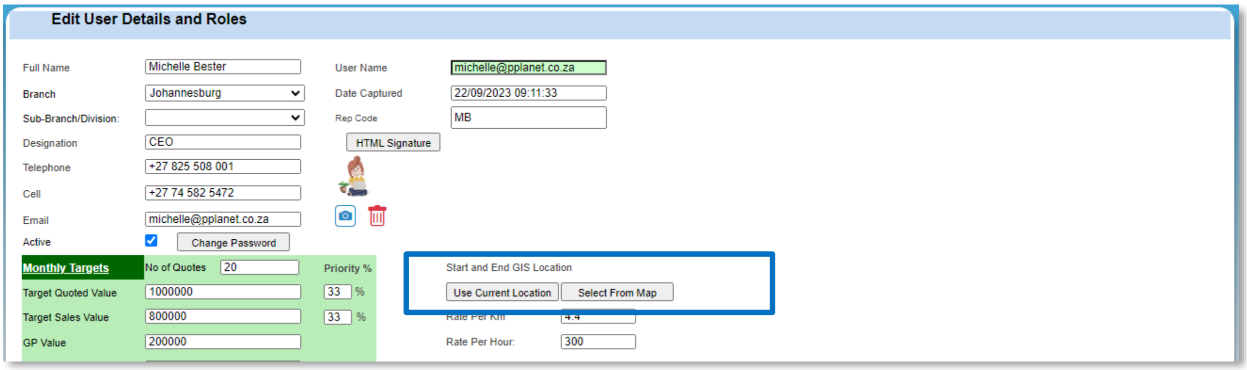
Only a **System Administrator** can change the following:

- **Roles**- Indicates the access levels of users.
- **Branch**- Indicates the branch the salesperson is in within the company.
- **Active**- The Administrator can use this check box to deactivate log ins for users who have left the company.
- **Monthly Targets**- Indicates the monthly revenue target set for the sales representative.

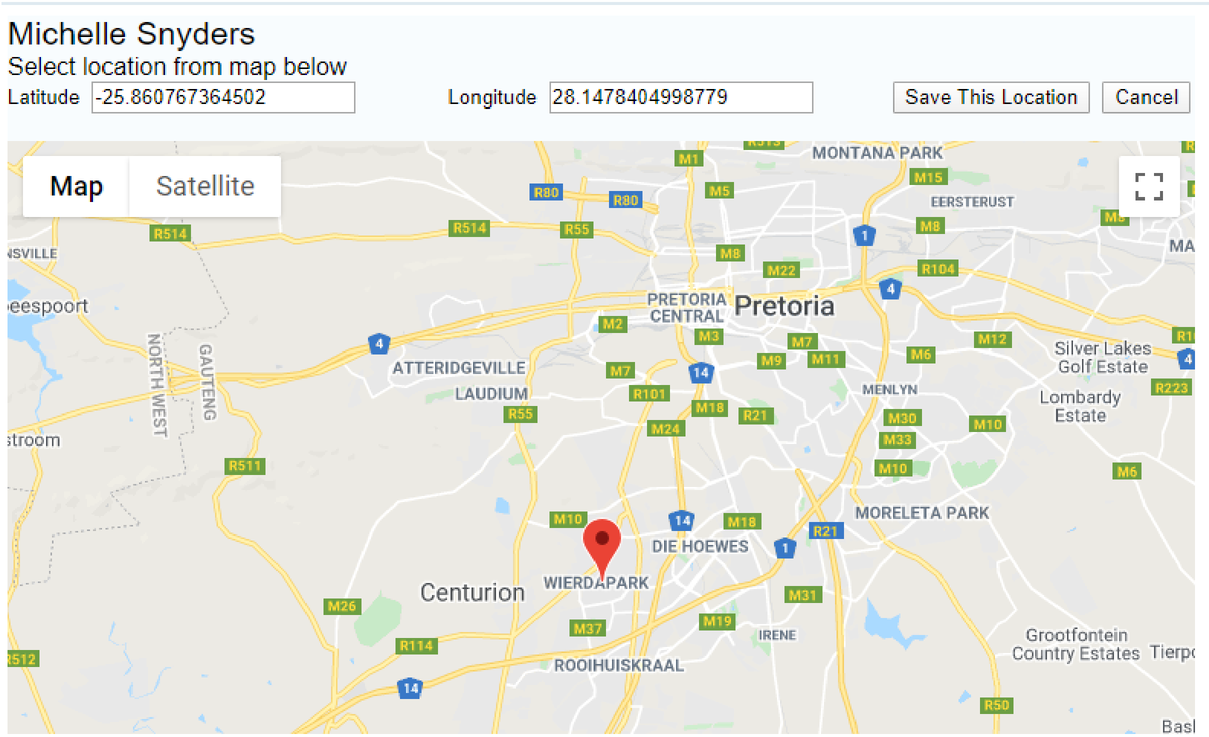


2.2.1 Set Location for Travel Claim Report

The user must set their default location (work/home address) on their profile- this will calculate from where they are leaving to go to appointments most often, for travel claim purposes. Click on the **Use Current Location button** or the **Select From Map button** in the users' profile.



To check which (or if) location has been set, click on the **Select From Map button** in the users' profile to view the map. The selected location will be indicated by a red pin.



3. Companies

3.1 View Companies

To view the companies loaded in your database, click on the **Companies menu,** and then the **View Companies option.**

Use the View Companies page to:

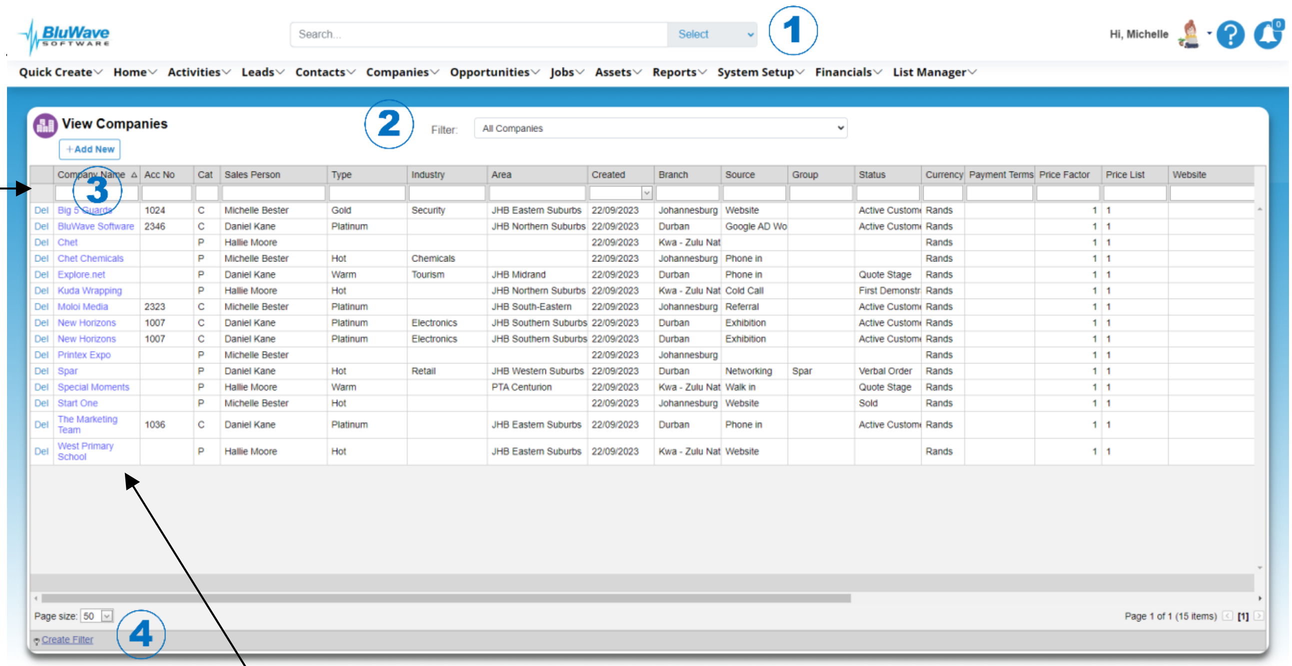
- Search for the company name to view the details of the client.
- Add new clients to the database.

This page allows the user to see all loaded companies (depending on what security roles are applied to the user's profile).

Search for a specific company by using:

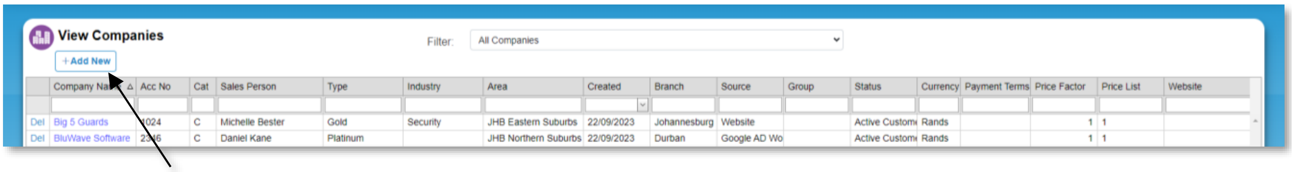
1. **The Search Field** at the top of the page and selecting the **"Companies" option** from the **Select dropdown** menu.
2. The **Filter dropdown** menu.
3. Typing in the Search fields at the top of the columns in the grid.
4. The **Create Filter link** at the bottom of the table.

The user can also sort each of the columns by clicking on the column heading or clear the filter by clicking on the **Clear Filter link** in the far left-hand of the grid.



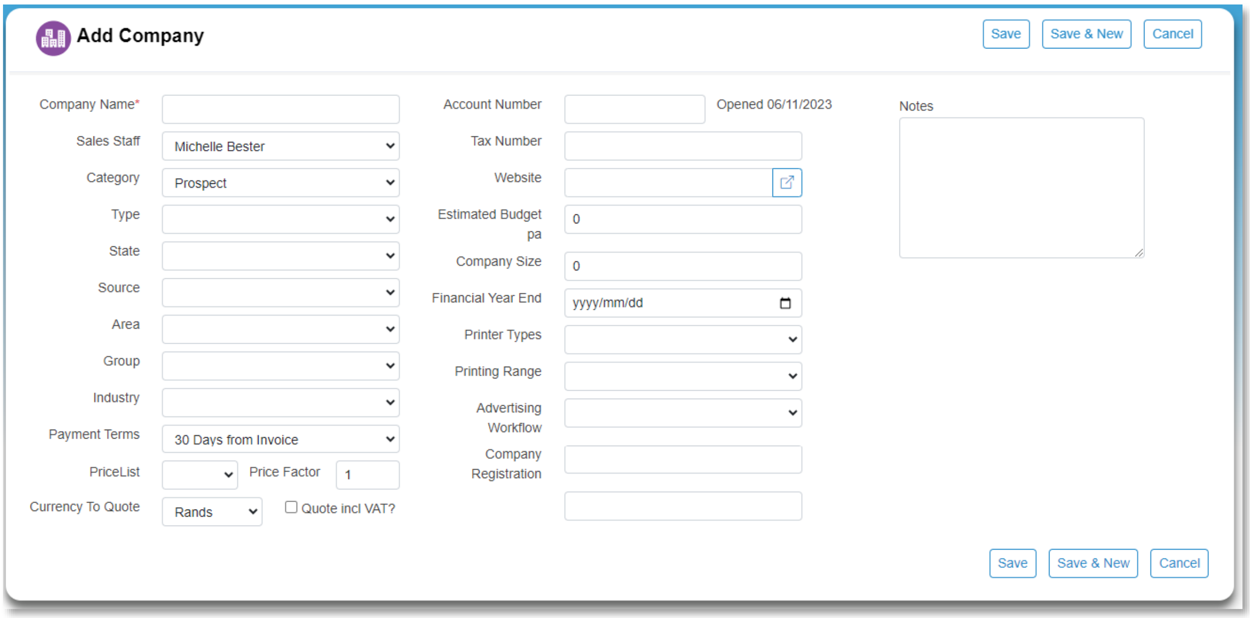
Clicking on the **Company name** will take the user to the Edit Company page for that specific company.

3.2 Adding a Company



Click on the **Add New** button to create a new company (prospect/customer) on the system.

Alternatively, a company can be added by using the **Quick Create** dropdown on the left side of the screen.



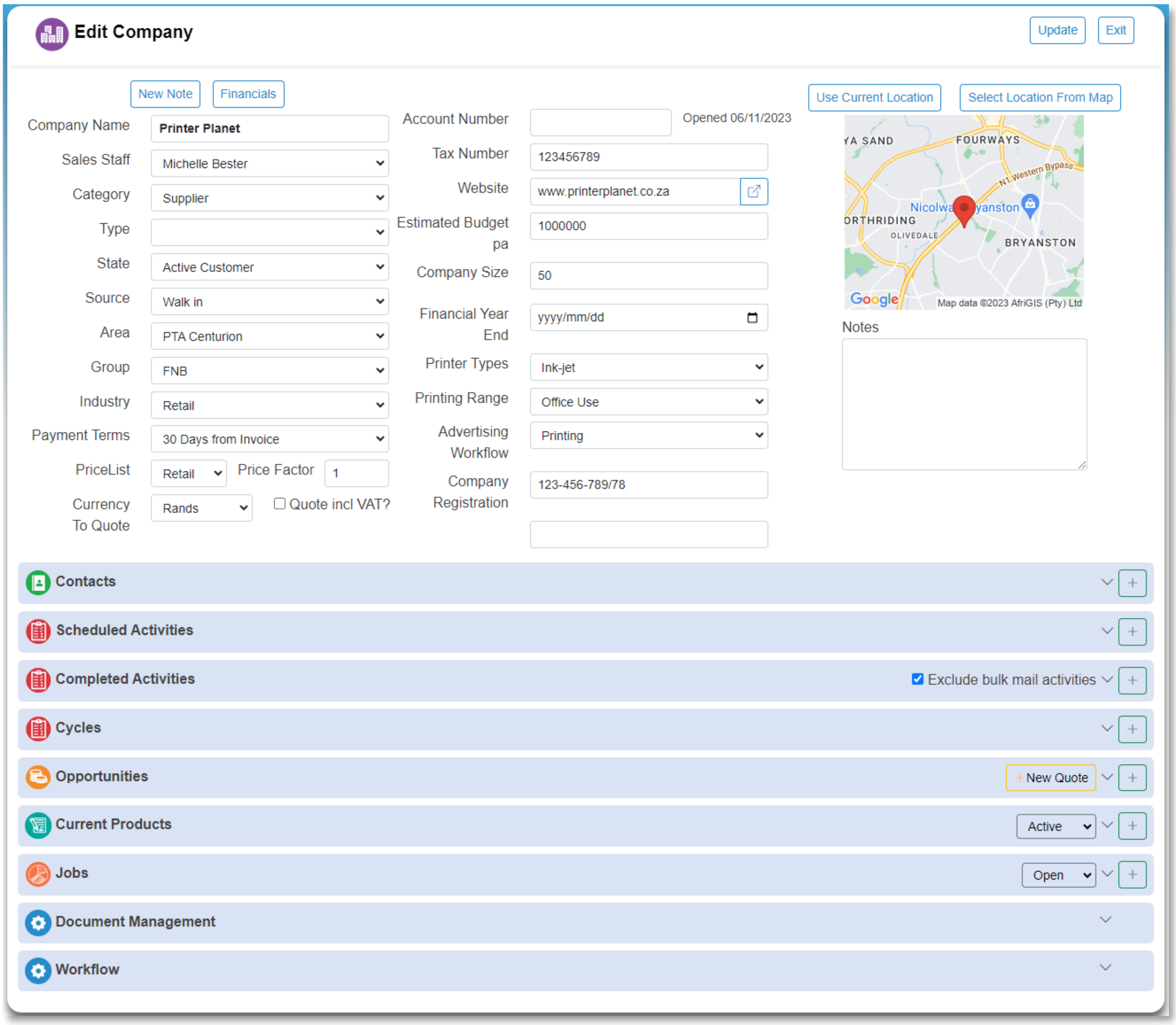
On this page the user will be required to fill in the following information:

- **Company Name**
- **Category** – Prospect; Customer; or Supplier
- **Type & State** – Both of which are dependent on the category chosen
- **Source** – Where did you get the company's information
- **Industry** – Of the client
- **Area** – Geographical location of the client
- **Payment Terms, Currency to Quote, Quote incl. VAT, Price Factor, Pricelist** (for quoting purposes)
- **Account Number** - Only if they are a debtor in your accounting package.
- **Group** – Refers to a Holding/ Parent Company
- **Website** – Of the client
- **Tax Number** – The clients vat/tax number
- **User-defined fields** – 2 numeric fields, 1 date, 3 dropdowns, 2 alpha-numeric fields. (These would only need to be populated if the system has been setup to utilize these fields)
- **Notes** – This field can be used for additional information on the company.

Click on the **Save** or **Save & New** button when done.

3.3 Edit the Company Details

Once the user has saved the company, they will be directed to the **Edit Company** page.



Company details can be updated at any time by making changes and clicking on the **Update** button to save these changes.

By using the panels below the company details on this page, the user will be able to add and view all:

- Contacts
- Cycles
- Activities
- Opportunities
- Current Products
- Jobs
- Documents
- Workflows related to the company

Note: The map on the right-hand side will only appear after a contact has been added to the company (with a physical address) and Google Maps registers the address.

Alternatively, if the user is already at the Companies' premises, clicking on the **Use Current Location** button at the top of the page will save the user's current GPS co-ordinates. The user could also use the **Select Location From Map** button to add an address to the Company page. This will not add or update the physical address of any of the **Contacts** associated with that company.

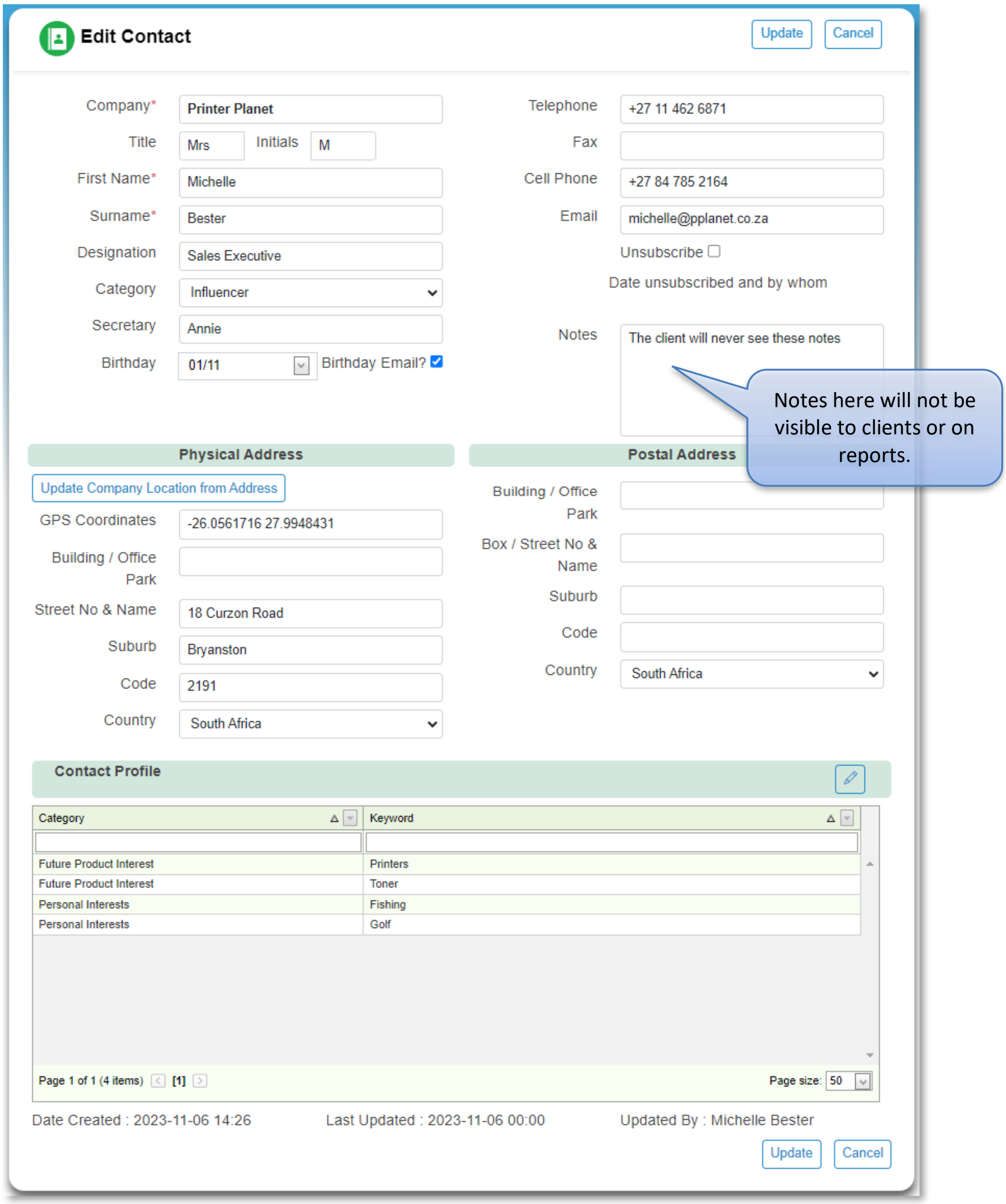
3.4 Add/ Edit Contacts

Contacts can be added from the **View Companies** page, **Quick Create** dropdown, or **Add New Contact** link under the **Contacts** menu.

From the **Edit Company** page:

- Expand the Contact list by clicking on the down arrow on the green **Contacts** panel
- Click on the **New** link to add a new contact
- Click on the **Contact Name** to open the **Edit Contact** page.

Contacts without an email address will not be available for meeting invitations or email filing.



Besides the contact's basic details, the following information can also be added:

- **Designation** – The contact's job title
- **Category** – Can be used to note where in the company the contact fits in. This can also be used to narrow down the contact database to a specific audience for newsletters.
- **Secretary** – The contacts gatekeeper/administrator.

Notes made on the **Add/ Edit Contacts** page will not appear on any reports.

Please note that with the new release the **Physical Address** should now be typed on the left-hand side of the page and the **Postal Address** should be type on the right-hand side of the page.

If there is more than one contact listed under the company and they have different addresses, the user can choose which contact's address should appear as the main address on the **Edit Company** page (map) by clicking on the **Update Company Location from Address button.** The map on the Edit Company page would then be changed to this address.

At the bottom of the **Edit Contact** page the creation and last updated date as well as who made the update will show.

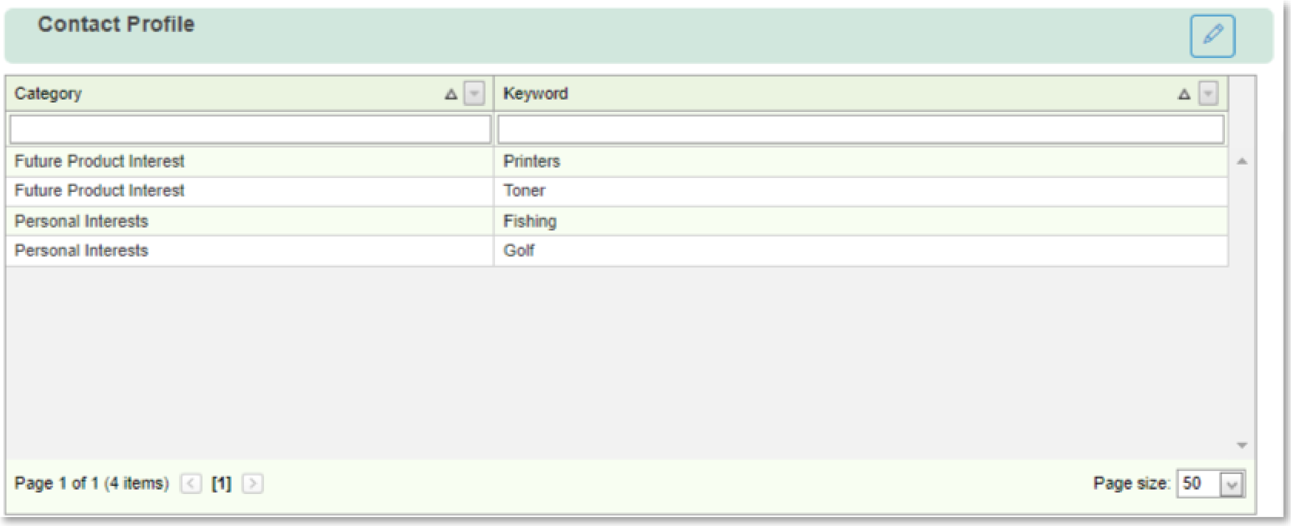
After making changes click on the **Update** button.

3.4.1 Contact Profile- Categories & Keywords

On the **Edit Contacts** page, the user can add certain keywords to the contacts' page/ profile.

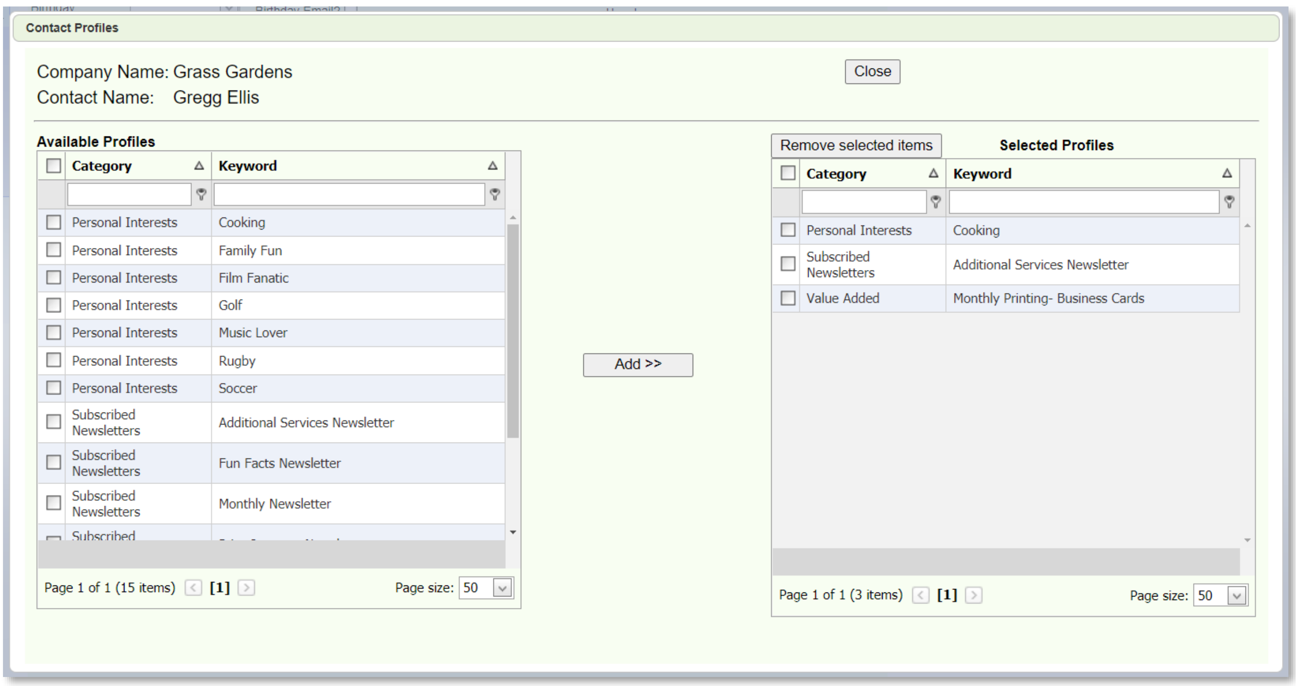
This can be customized and set up as and how the company would like to utilize the function.
It could be keywords of future interest in a service or product, which newsletters the contact would want to be subscribed to, or what their personal interests and hobbies are.

At the bottom of the **Contact Profile** panel, click on the **Edit** button to add or edit the keywords assigned to the contact.



On the **Contact Profile** page tick the keywords (in the left column) that should be applied to the contact and then click on the **Add** button.

If there are keywords that need to be removed from the contact, tick the keywords (in the right column) and then click on the **Remove selected Items** button.



To return to the **Edit Contact** page, click on the **Close** button at the top of the screen.

4. Activity Management

An **Appointment** (Date and Time) and a **Task** (Date only) are both classified as an **Activity**.

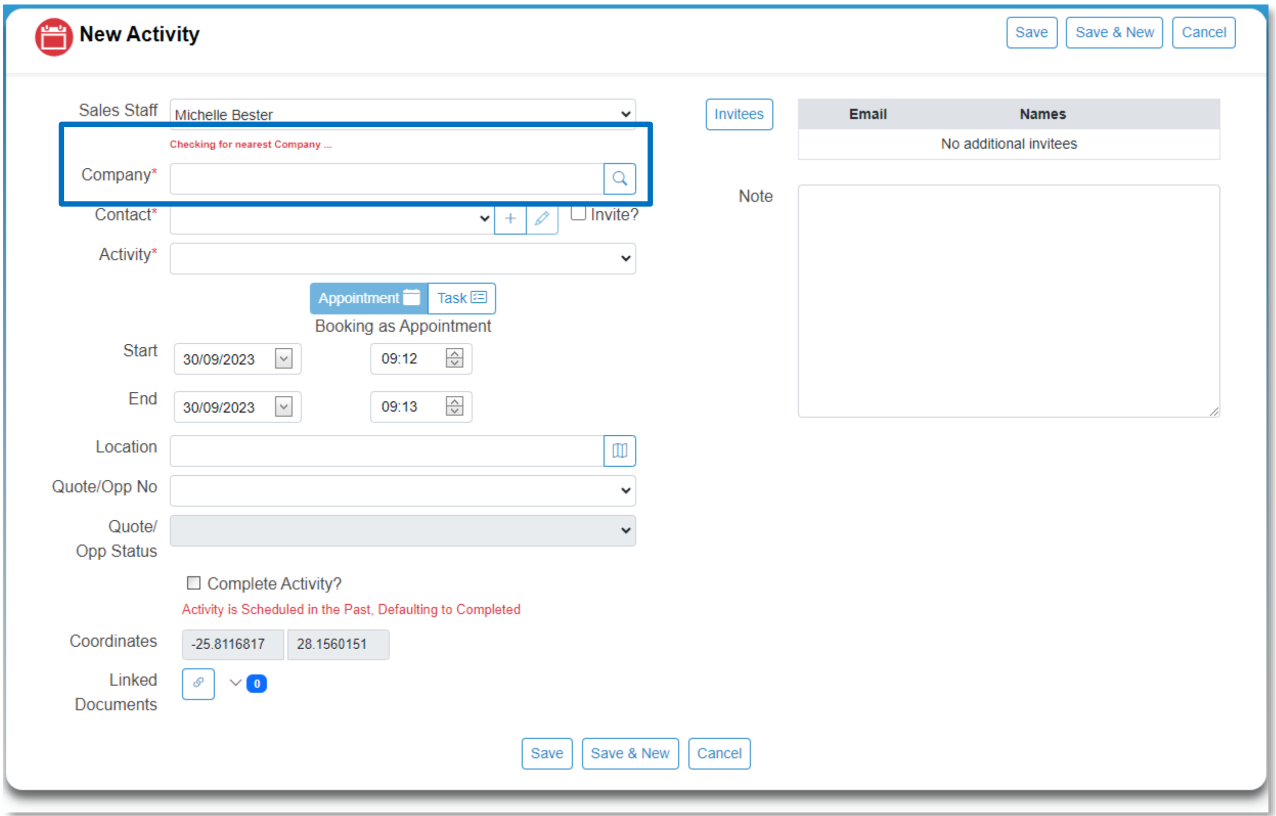
To add a New Activity:

- On the **Edit Company** page, click on the **Add (+)** button on either the **Scheduled Activities** or **Completed Activities** panels.
- On the **Activities** menu, click on the **Add New Activity** option, or directly on the **Diary Planner** option**.**
- Select Appointment or Task from the **Quick Create** dropdown

When adding an activity via the **Quick Create/ Activities** menu, and if the user has enabled the **Default New Activity Company to the nearest company based on Geo Location** checkbox in their user profile, the system will pre-populate the user's nearest client's details.

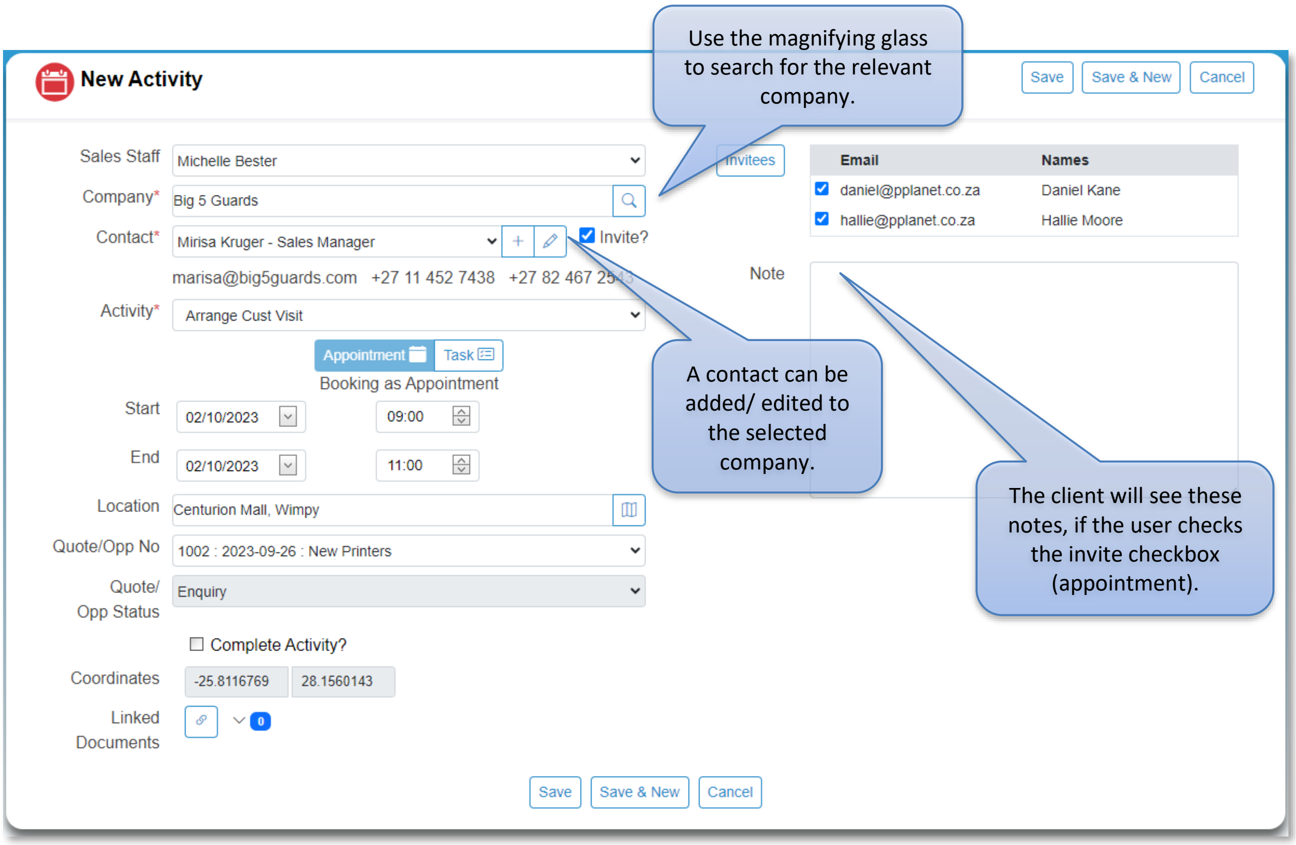
This helps the user to quickly create a call report for the company the user is physically at. This is especially useful for the salesperson who calls on customers without an upfront appointment.

If this is not the correct company, the user will be able to use the magnifying glass and do a **Company Lookup**.



4.1 Add an Activity (Task/ Appointment)

Any of the before-mentioned ways to add an activity will direct the user to this page.



- Select the type of **Activity** from the dropdown.
- Clicking on the **Appointment or Task** button will:
  - Enable the **Time** fields and show the **Invitee** button for the Appointment
  - And disable the **Time** fields and hide the **Invitee** button for the Task.
- The **Location** of the activity can be changed by typing in the required location.
- The **Map icon** next to the location field will direct the user to Google Maps; the user can then use this to get directions to the location of the appointment.
- Type a **Note** for the activity if required.
- Click on the **Save** button. If the user wishes to create another activity, this can be done by clicking on the **Save & New** button.

4.1.1 Inviting the selected Contact to an Appointment

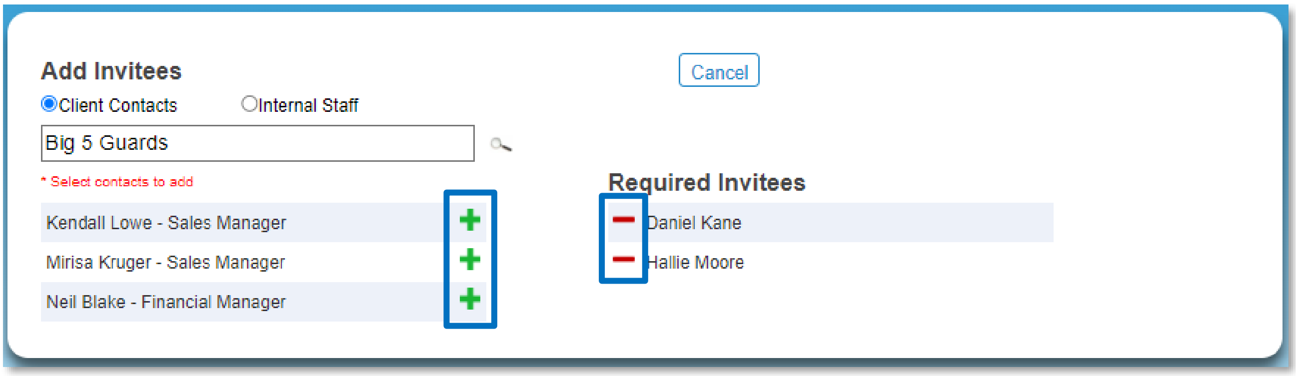
Next to the **Contact** field is a checkbox; if this box is ticked it will automatically send the individual in the contact field a meeting request. This box should be unchecked if the user does not wish to send an appointment invitation to the selected contact.

4.1.2 Inviting multiple contacts to an appointment

BluWave CRM allows the user to invite additional contacts to the same appointment if required.

Step 1: Click on the **Additional Invitees** button on the appointment screen.

Step 2: Select the recipients by clicking on the **green plus icon** next to each name the user would like to invite. The required invitees will appear on the right-hand side with a **red minus icon**. If the user decides one of the already selected invitees does not need to receive an invite, the user can simply click on the **red minus icon** and the invitee will be removed.



Step 3: To include internal recipients to the appointment, select the **Internal Staff** radio button and this will show a list of all the users on the BluWave CRM system. Add the required invitees by clicking on **the Green plus icon** next to their names and they will display underneath the required invitees.

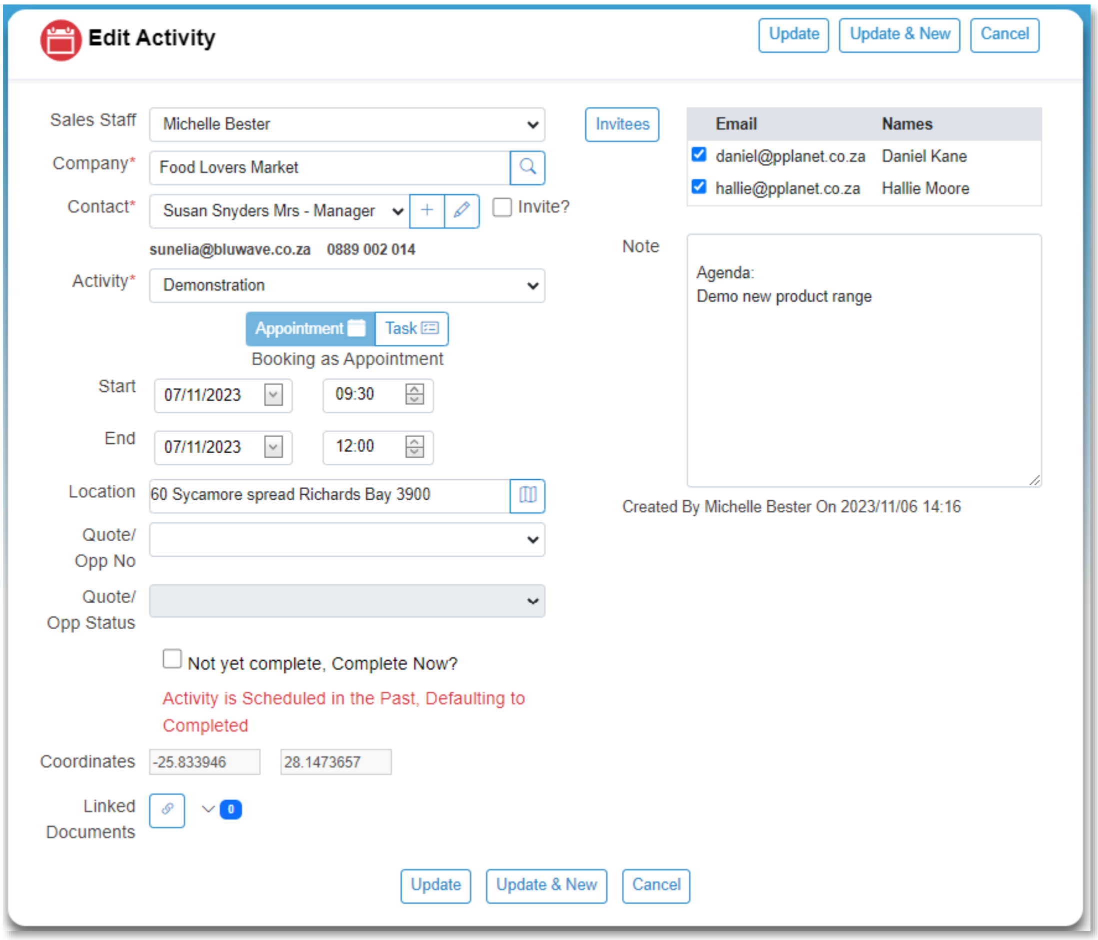
Step 4: If the user wishes to invite contacts from multiple companies to the same appointment, the user can use the magnifying glass to search for the additional companies. Repeat Step 2 to add them to the required invitees.

Step 5: Click on the **Done** button, at the top of the page, once finished. The user will then be directed back to the **Add/Edit Activity** page.

The additional invitees will appear on the right-hand side of the appointment page. Make sure to check the invite checkboxes next to each person to send them the meeting request.

When saving the appointment, an appointment invitation will be sent to all the contacts with the checkbox selected.

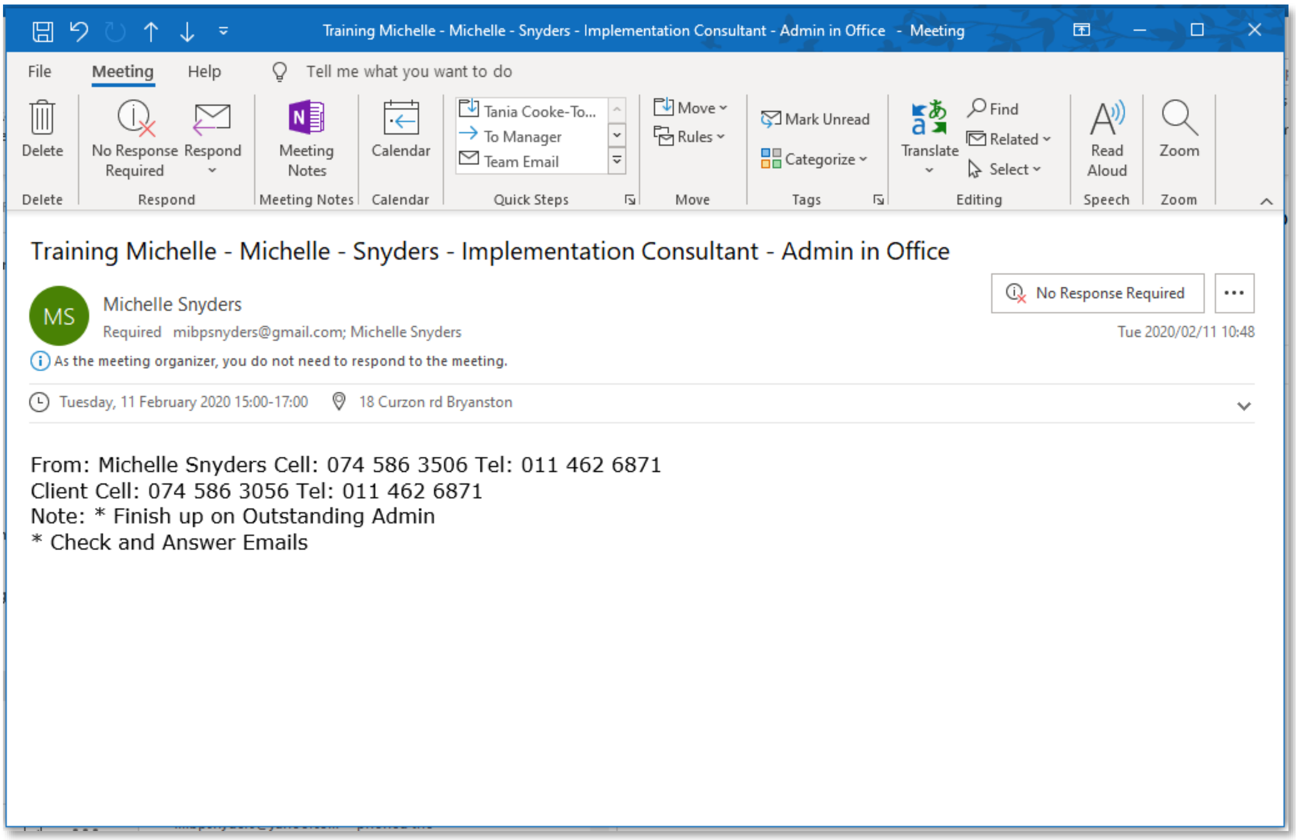
On the diary planner the user will only see the main contact' details. Opening/editing the appointment will show the additional invitees.



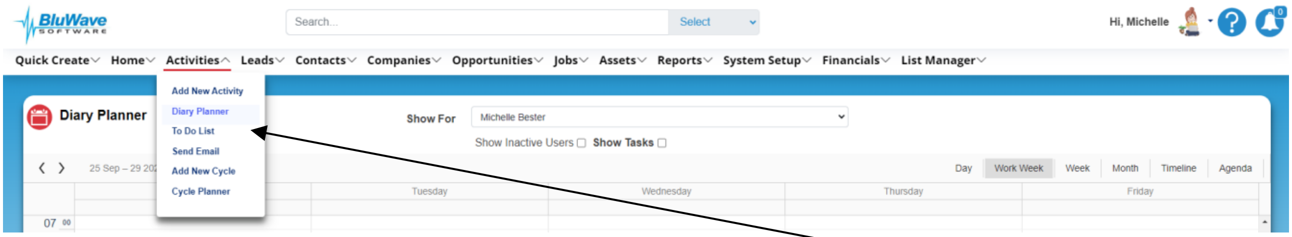
4.1.3 Appointment Invitation Emailed to the Customer

All selected invitees to an appointment (either by means of ticking the **invite checkbox** or **additional invites** button) will receive an emailed invitation/calendar request.

The recipient customer can then accept the appointment into any .ics compliant calendar program including (but not limited to) MS Outlook Calendar, Lotus Notes Calendar, or Gmail Calendar.



4.2 Diary Planner

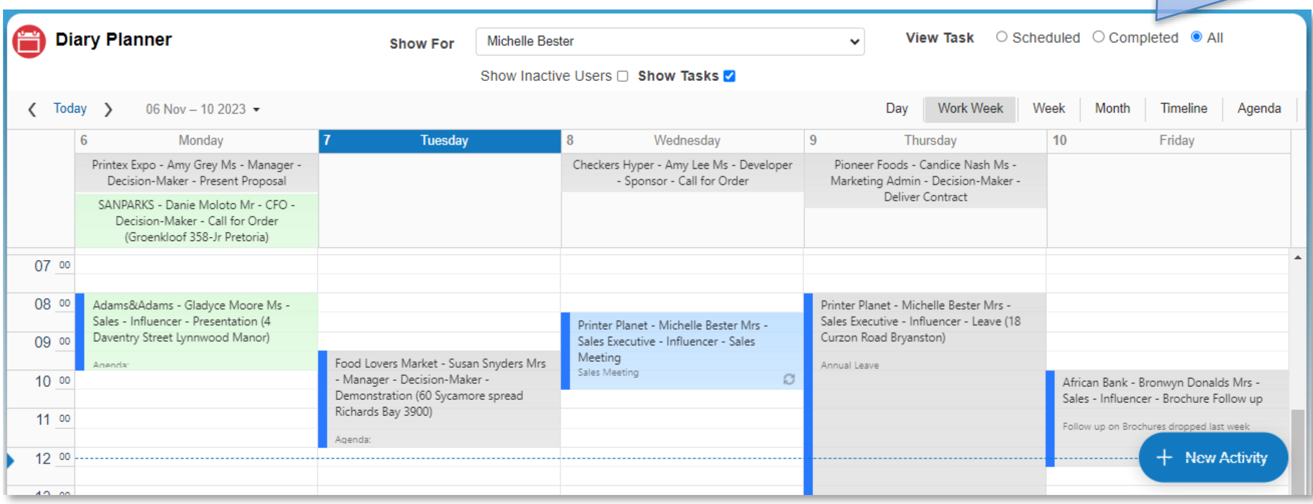


The **Diary Planner** is accessed from the **Activities** menu and selecting the **Diary Planner** option. Alternatively, the **Diary Planner** can be accessed from the **Home** menu, by clicking on the **Go to Diary Planner** button.

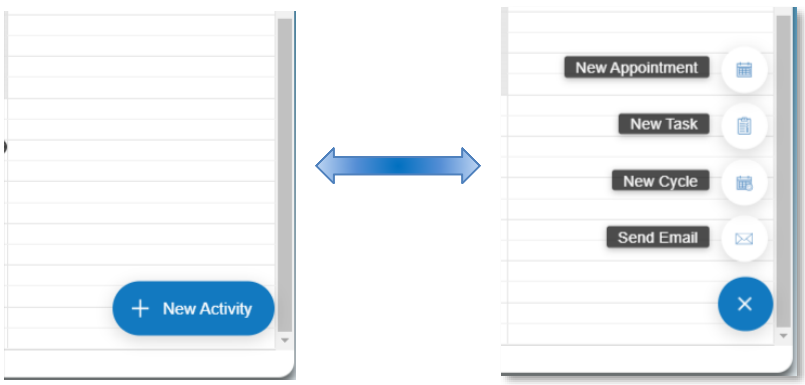
Access the different diary planner views using the tabs on the right. (**Day, Work Week, Week, Month, Timeline & Agenda**)
The Work Week view show the appointments for the day in the bottom section and the tasks at the top in the grey section.

Work Week View
The **Work Week** view is the system default; it shows all booked activities for the working week hence, it excludes Saturday and Sunday.

Toggle between these radio buttons to change whether only Scheduled, only Completed or All tasks should show on the diary.



Right click on an empty time slot to create a **New Activity** for that time.



Or click on the **+ New Activity** button to the bottom right of the screen to add a new item.

Note that the dotted blue line on the **Diary Planner** will indicate the current time.

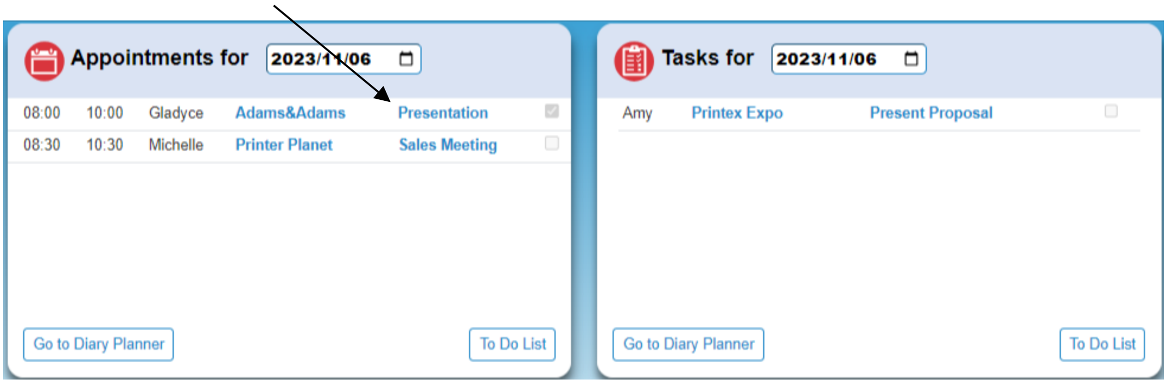
4.2.1 Alternate Views of the Diary Planner

Day View	This view shows all appointments and tasks that have been scheduled for a specific day.
Work Week View	This view is the system default; it shows all booked activities for the working week hence it excludes Saturday and Sunday.
Week View	This view shows all scheduled appointments and tasks for the week and will include Saturday and Sunday.
Month View	This view shows all the activities in the diary that have been scheduled, from the current week to the corresponding week in the following month.
Timeline View	This view will show all scheduled appointments and tasks for a ten-day period.
Agenda	shows the activities of the day on chronological order with the notes on each activity.

4.3 Edit an Activity

4.3.1 Home Page

An activity can be accessed/ edited from the **Home** page, **Edit Company** page & **To Do List** page, by clicking on the **Activity Description**.



4.3.2 Edit Company Page

From the **Edit Company** page, the user would expand the **Scheduled Activities** panel and click on the activity description they wish to edit. It will open the same screen as below.

Also note that the **Add(+)** button on the **Scheduled and Completed Activity** panels will allow the user to create a new activity for this client; the company name will be defaulted.

4.3.3 Diary Planner Page

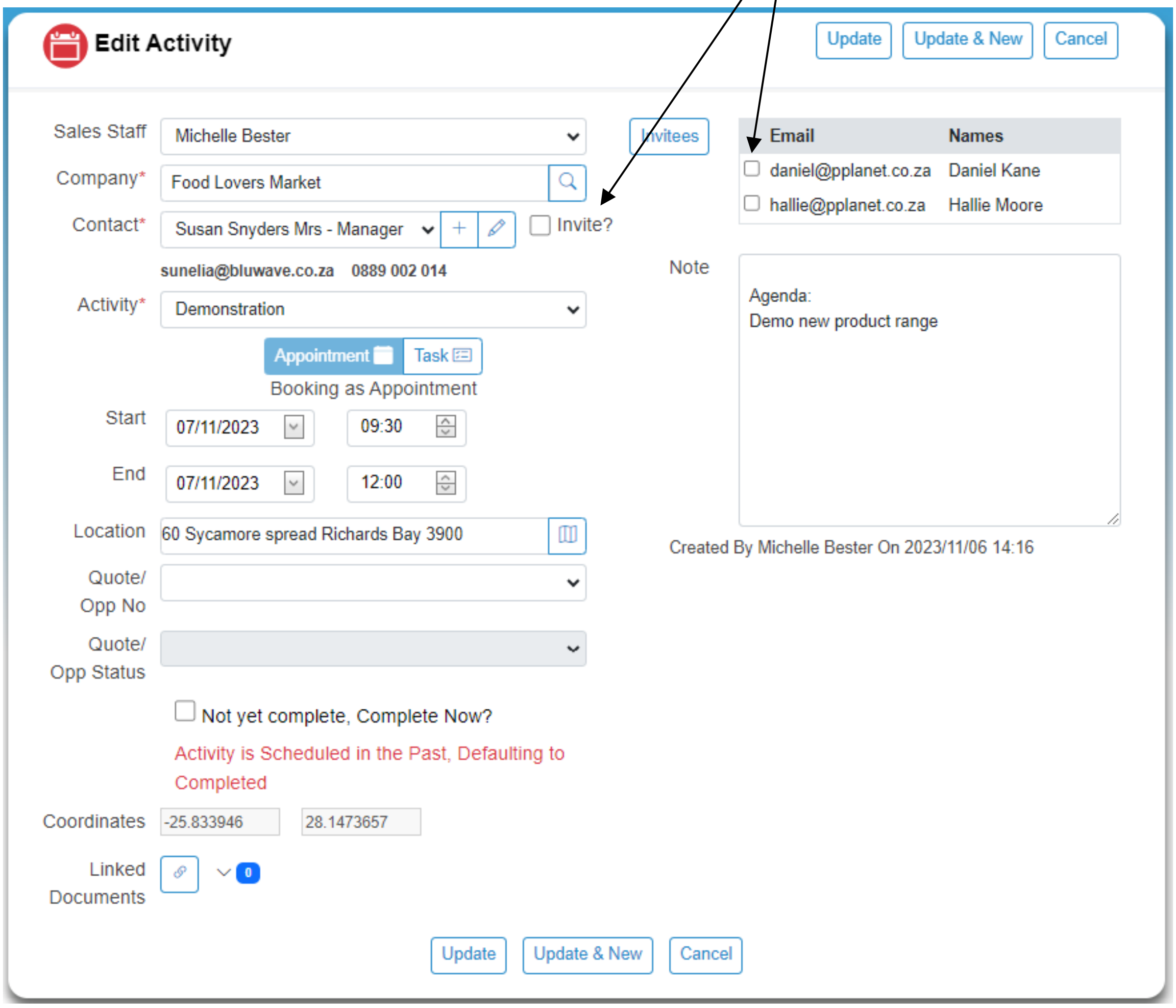
An activity can also be accessed/ edited from the diary planner (**Activities** menu), by left clicking on the activity. (for more information look at the previous Diary Planner heading/section)

Once the user has clicked on the activity, the **Edit Activity** page will open.
The user will then be able to make the necessary changes to the activity (to the date, time or notes etc.).

Click on the **Update** button to save the changes made to the activity.

If the user edits the appointment in BluWave, the system will edit the user's appointment in their local calendar.

Opening an existing appointment will default all invitees to **unselected.** If the appointment is changed with information that the invitees require (date, time etc), they must be **selected** before updating the activity so that the invitees receive an updated meeting request.



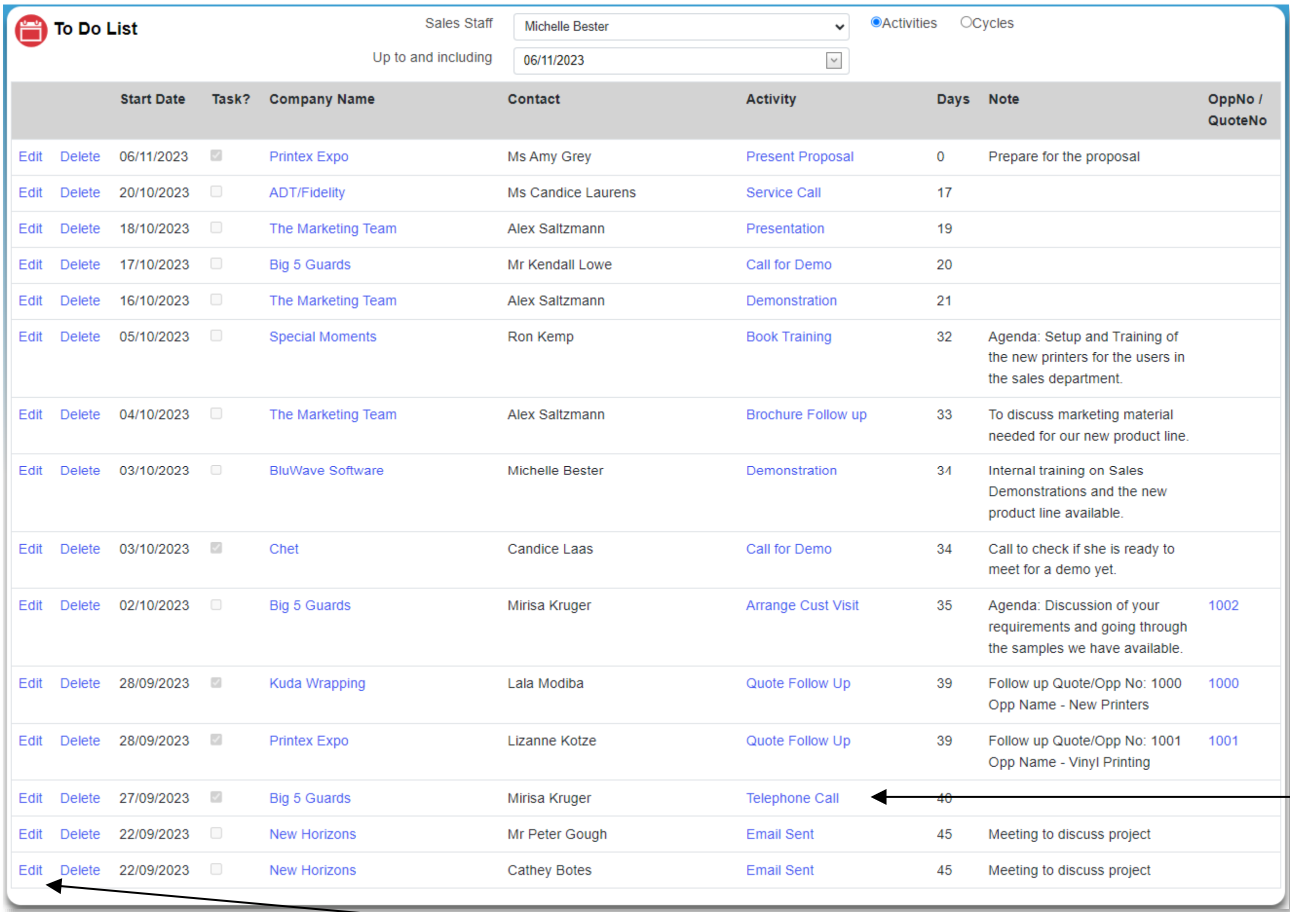
If an activity is changed to a task, the invite contact checkbox is unchecked, and the user will not be able to have additional invitees on that activity.

4.4 To Do List

The **To Do List** page will show all the open activities on the system up until today (by default).

To get to the **To Do List** page:

- Select the option from the **Activities** menu.
- By clicking on the **To Do List** button on the **Home** page.



To Do List
Sales Staff Michelle Bester
Up to and including 06/11/2023
Activities Cycles

		Start Date	Task?	Company Name	Contact	Activity	Days	Note	OppNo / QuoteNo
Edit	Delete	06/11/2023	✓	Printex Expo	Ms Amy Grey	Present Proposal	0	Prepare for the proposal	
Edit	Delete	20/10/2023		ADT/Fidelity	Ms Candice Laurens	Service Call	17		
Edit	Delete	18/10/2023		The Marketing Team	Alex Saltzmann	Presentation	19		
Edit	Delete	17/10/2023		Big 5 Guards	Mr Kendall Lowe	Call for Demo	20		
Edit	Delete	16/10/2023		The Marketing Team	Alex Saltzmann	Demonstration	21		
Edit	Delete	05/10/2023		Special Moments	Ron Kemp	Book Training	32	Agenda: Setup and Training of the new printers for the users in the sales department.	
Edit	Delete	04/10/2023		The Marketing Team	Alex Saltzmann	Brochure Follow up	33	To discuss marketing material needed for our new product line.	
Edit	Delete	03/10/2023		BluWave Software	Michelle Bester	Demonstration	34	Internal training on Sales Demonstrations and the new product line available.	
Edit	Delete	03/10/2023	✓	Chet	Candice Laas	Call for Demo	34	Call to check if she is ready to meet for a demo yet.	
Edit	Delete	02/10/2023		Big 5 Guards	Mirisa Kruger	Arrange Cust Visit	35	Agenda: Discussion of your requirements and going through the samples we have available.	1002
Edit	Delete	28/09/2023	✓	Kuda Wrapping	Lala Modiba	Quote Follow Up	39	Follow up Quote/Opp No: 1000 Opp Name - New Printers	1000
Edit	Delete	28/09/2023	✓	Printex Expo	Lizanne Kotze	Quote Follow Up	39	Follow up Quote/Opp No: 1001 Opp Name - Vinyl Printing	1001
Edit	Delete	27/09/2023	✓	Big 5 Guards	Mirisa Kruger	Telephone Call	40		
Edit	Delete	22/09/2023		New Horizons	Mr Peter Gough	Email Sent	45	Meeting to discuss project	
Edit	Delete	22/09/2023		New Horizons	Cathey Botes	Email Sent	45	Meeting to discuss project	

From this page the user can edit an activity, by either clicking on the **Edit** link on the left of a line, or by clicking on the **Activity Description**.

Clicking on the **Company Name** directs the user to the **Edit Company** page.

The **Up to and including date** can be changed to any date to show more or less records.

The **Days** columns shows how many days an activity is overdue by, or how many days in the future it is scheduled for:

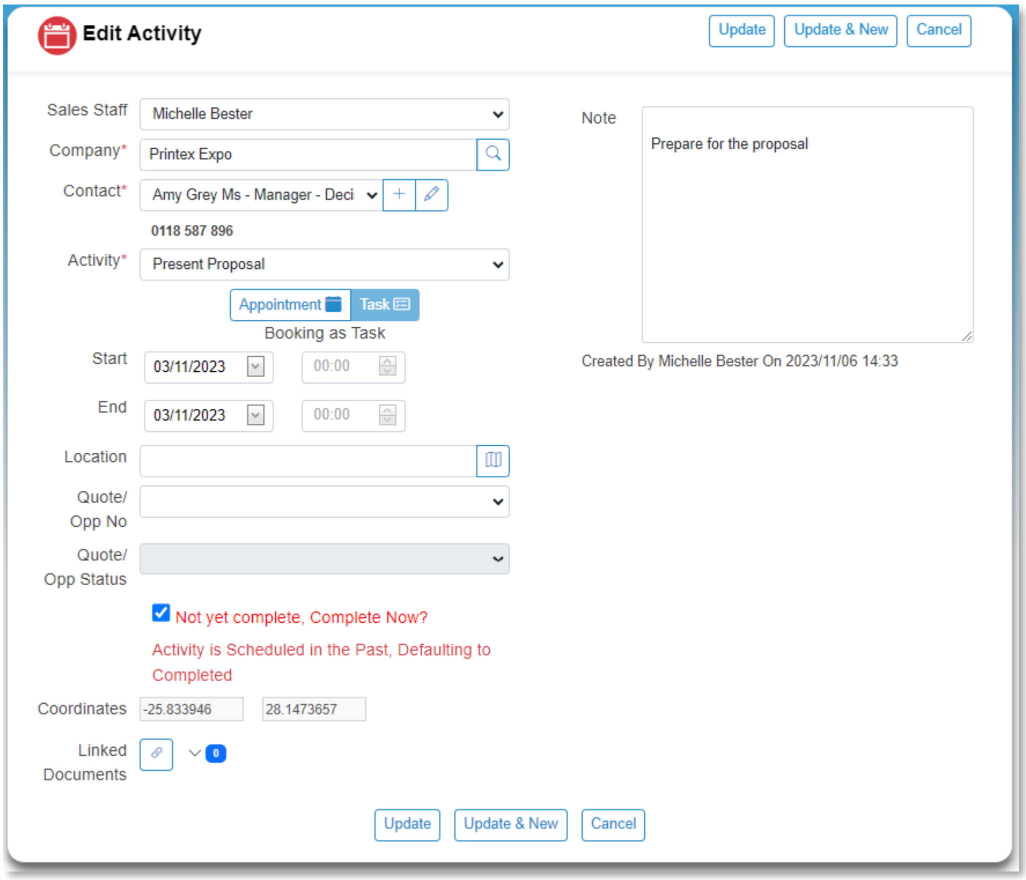
- A negative value (i.e. -1) – shows how many days in the future the activity is scheduled for.
- A positive value (i.e. 2) – shows how many days the activity is overdue.
- A zero value (i.e. 0) – shows the activity is due today.

4.5 Completing an Activity

In order to complete an activity, the user would open / edit an activity (as shown previously).

On the **Add/ Edit activity** page, the user must ensure that the following is done:

- The **Date and Time** fields are set to the past.
  - If a user edits an activity where the activity date (for tasks) and time (for appointments) is in the past, the system automatically checks the completed check box; this makes it easier for users to complete activities.
  - Editing the activity to a future date will automatically uncheck the **Complete Now** checkbox
  - Creating an activity in the past will automatically complete the activity.
  - Activities dated in the future cannot be completed.
- The **Notes** (call report) are in the notes section.
  - A browser extension or cell phone voice to text function can be used by the user to add their call report into the notes section.
- The **Coordinates** fields show GPS coordinates (if the activity should be geo-located; should it not display, the user should check their connectivity and location settings).
- The "**Not Yet Complete, Complete Now?**" checkbox is checked. (Should it show "Completed.", the activity has already been completed.)



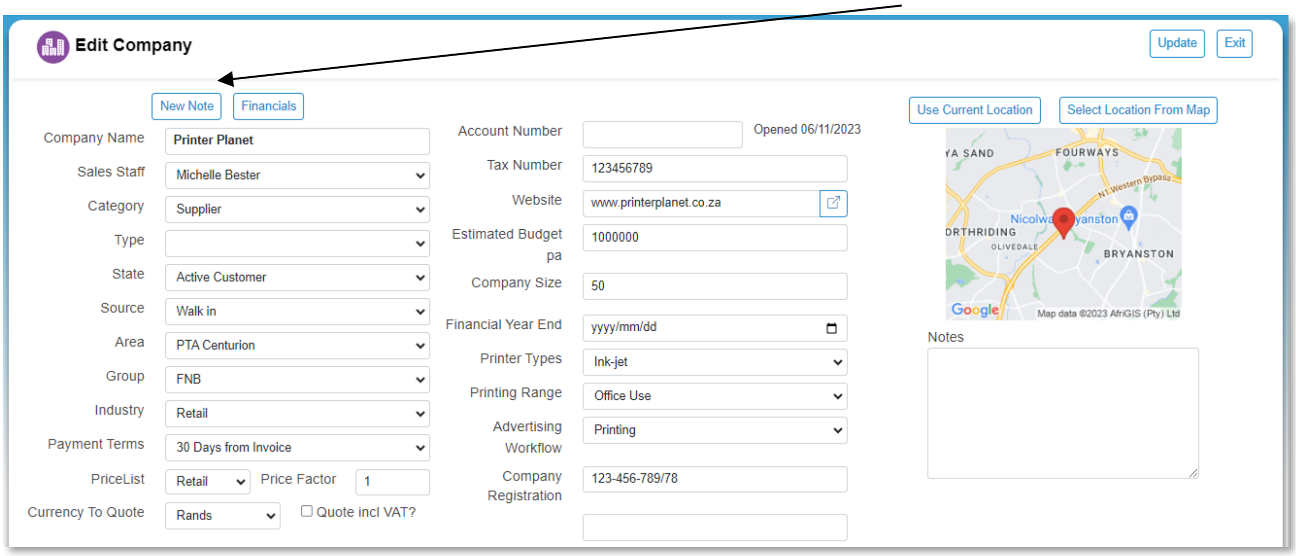
The **Update & New** button allows the user to complete the current activity and then book a new activity on that same company (a Follow up activity).

Once an activity has been completed, the colour of that activity changes to green on the **Diary Planner** page.

4.6 New Note (Logging Unexpected Communication)

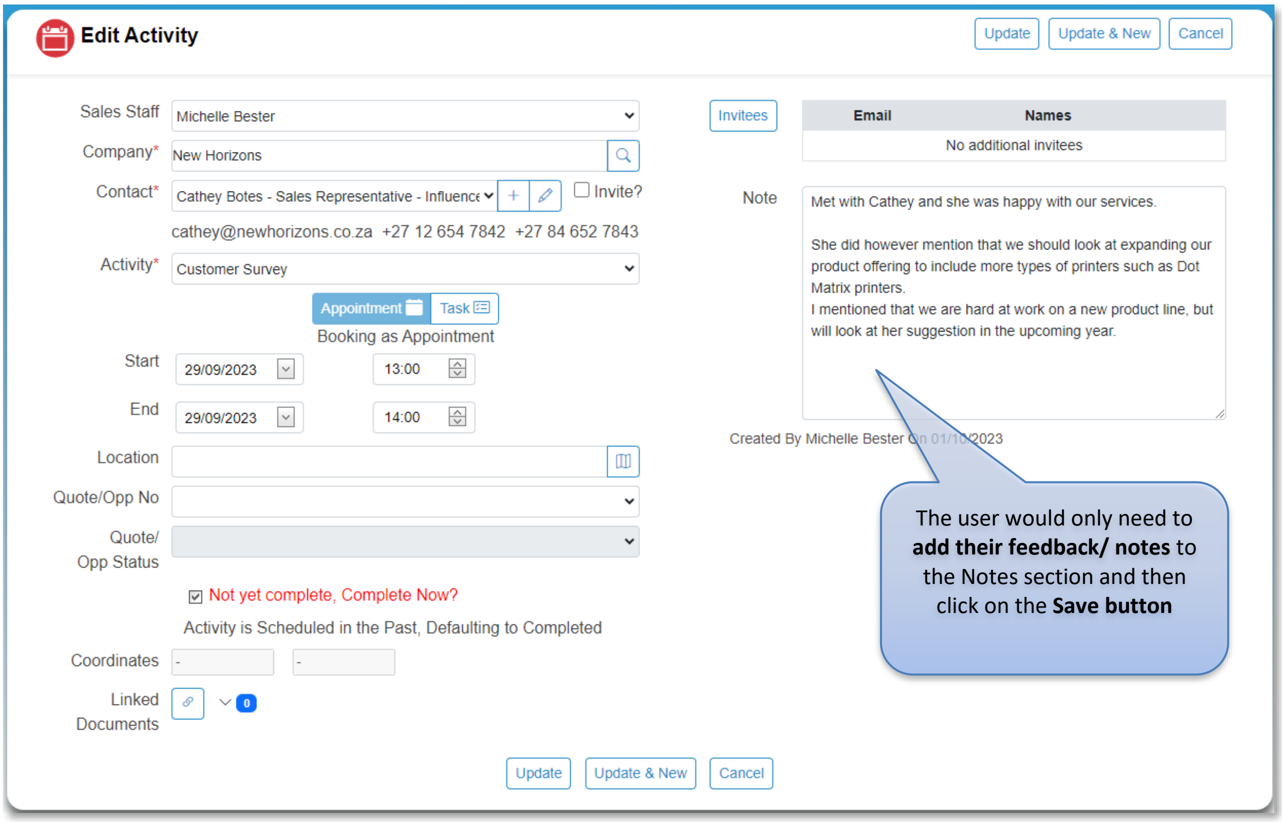
The **New Note** function allows users to quickly log a telephone call, support call or even to just add additional information to the **Edit Company** page.

To add a New Note, go to the **Edit Company** page, and click on the **New Note** button.



This will direct the user to the **Add Activity** page, with the following information already defaulted:

- The **Company** and **Contact** details (the user might need to select the correct contact person).
- The **Activity Description** (determined by user system settings).
- The **Date** and **Time** (pre-set to current date and time).
- The **Complete Activity** checkbox ticked (This will be ticked, as the system recognises the time and date to have occurred in the past).



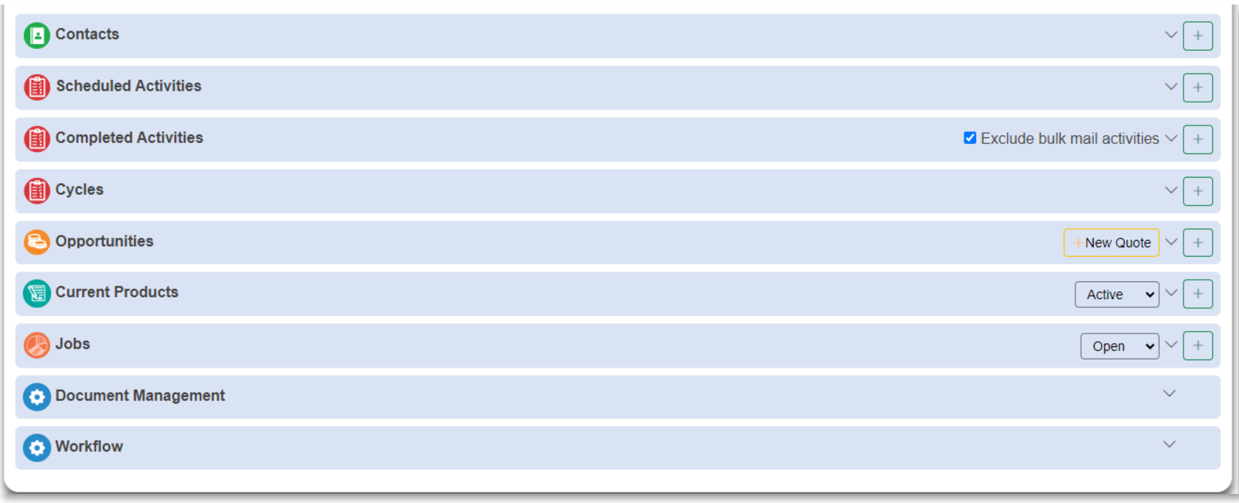
4.7 Cycles

4.7.1 Adding a Cycle

A Cycle can also either be an **Appointment** (Date and Time) or a **Task** (Date only), which are both classified as a Cyclical **Activity**.

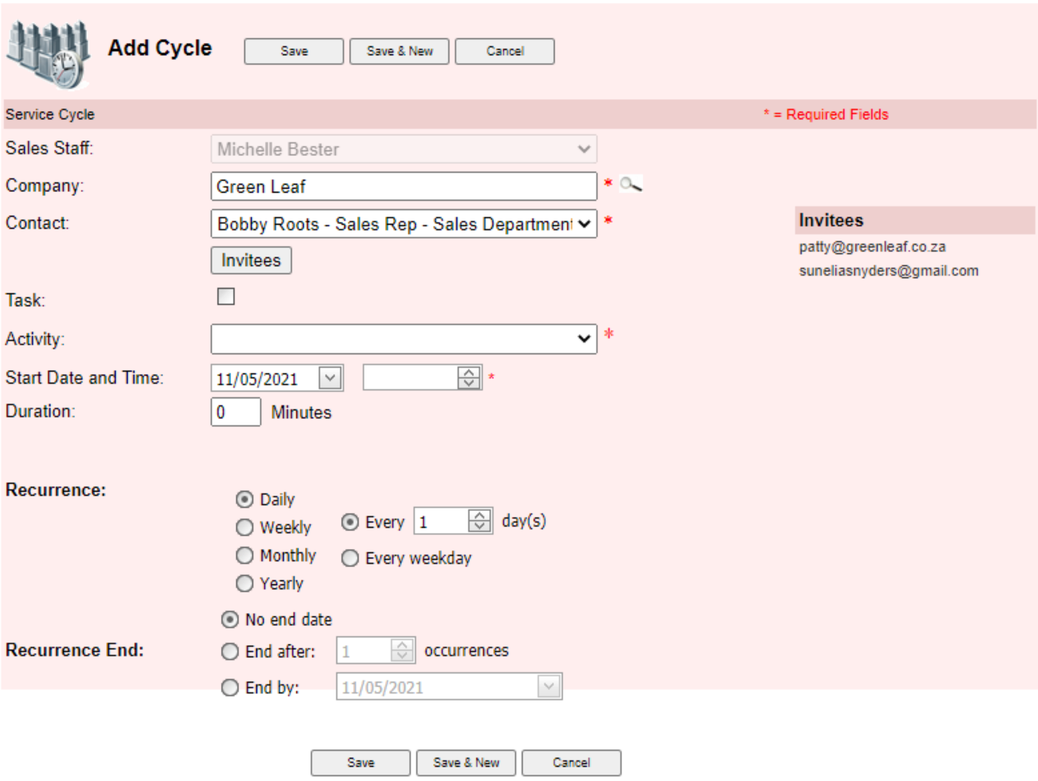
To add a New Cycle:

- On the **Edit Company** page, click on the **Add (+)** button on the **Cycles** panel.
- On the **Activities** menu, click on the **Add New Cycle** option,
- or from the **Diary Planner** option, click on the **+New Activity** button (bottom right of the screen) and choose the **New Cycle** option.
- Select **Cycle** from the **Quick Create** dropdown



On the **Add Cycle** page the user may create either a recurring **task** or a recurring **appointment**, by simply selecting/ deselecting the **Task?** checkbox.

A recurring **task** can be created by the user either for themselves or for other users, however a recurring **appointment** can only be created by the user for themselves.



Step 1: Select the **Company** (using the magnifying glass) and the correct Contact person.

Step 2: Decide whether this cycle should be a **task** or an **appointment**.

- For a **Task**, only the **Start Date** would need to be populated (usually defaulted to today).
- For an **Appointment**, the **Start Date**, **Time** and **Duration** of the Appointment would also need to be populated.

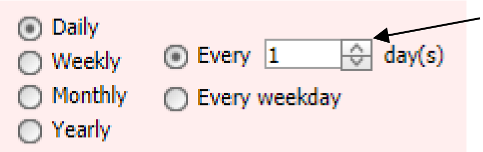
Step 3: Add additional invitees by clicking on the **Invitees** button (if applicable).
Additional invites may be added to a cycle / recurring appointment. If the additional invitees are active users of BluWave, an entry for the cycle will be created for that active user and appear on their diary planner. The main contact as well as the invitees will receive a meeting request for this cycle.

Step 4: Select the recurring **Activity**- description of the interaction that should ocurr**.**

Step 5: Select the relevant **Recurrence** settings.

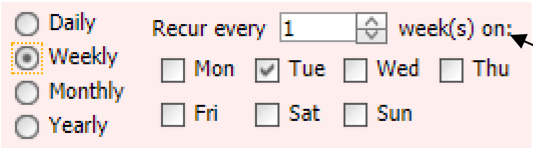
4.7.1.1 Recurrence Options

Daily



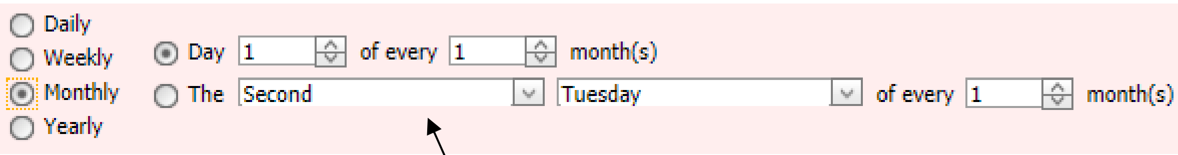
This will create a daily activity that will appear in the user's diary planner as often as the user has selected it to occur.

Weekly



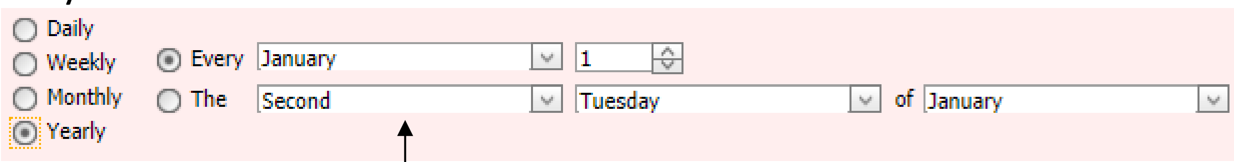
Select the days the user wants the activity to recur in a week and how often the user wants this reminder (e.g. every 2 weeks). Multiple days can be selected.

Monthly



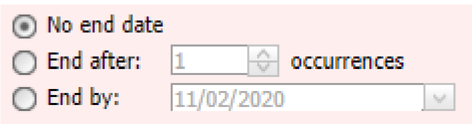
For monthly cycles, indicate which date/or day of the month the user wants to set the recurring activity for, as well as the monthly interval.

Yearly



For yearly cycles, indicate the date/day and month the selected activity will recur.

Step 5: Select when the Recurrence should end.



Set when the user wants the recurring activity to end. The user can either set the activity to never end; set it to end after a particular number of occurrences; or set the specific date they want the activity to end.

Step 6: Click on the **Save** button to save this cycle.

4.7.2 Viewing/ Editing a Cycle

Once the Cycle has been saved and added to the system, that Cycle can then be found on the **Edit Company** page as well as on the **Diary Planner** page and the **To Do List** page.

4.7.2.1 From the Edit Company Page

From the **Edit Company** Page, the user may view the Cycle created, by expanding the **Cycles** panel.

To **Edit** the Cycle (the series/recurrence), clicking on the blue icon on the left of the cycle will direct the user to the **Edit Cycle** page, where the necessary changes may be made (i.e. the recurrences or activity description).

A user cannot make changes to another user's cyclical appointment. On the company page the **Organizer** of a cycle will be stated to assist with who can make changes to the cycle.

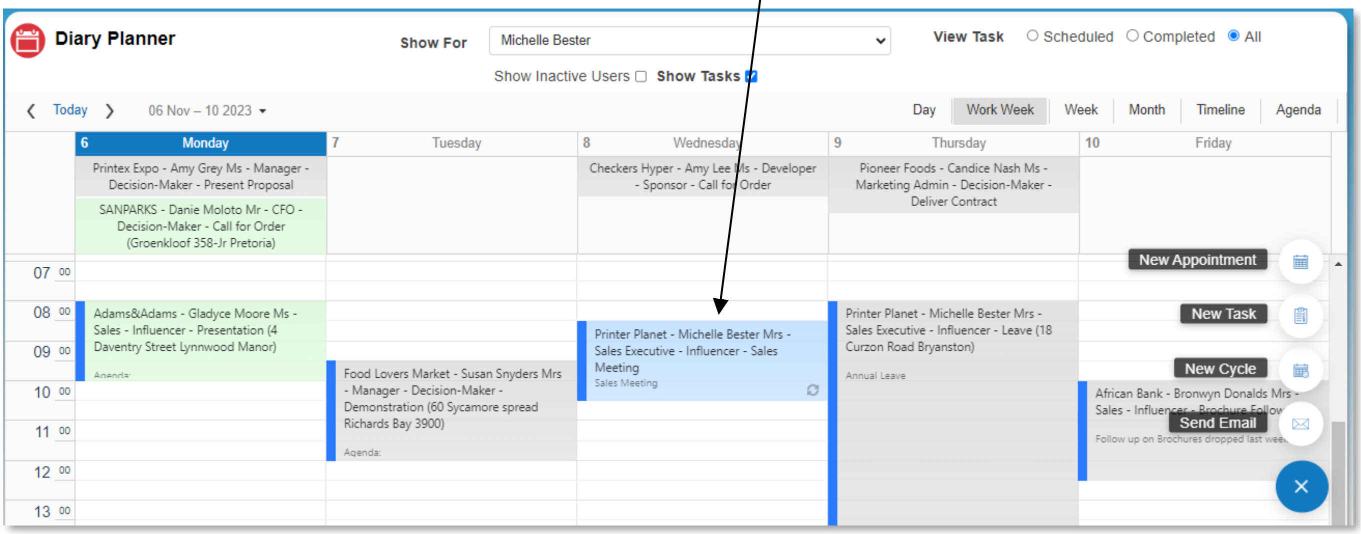
When a user edits their cyclical appointment (as the organizer of that cycle), the related cycles created for other active BluWave users will also be edited.

To complete one specific occurrence of the cycle, click on the **Date** link in either the **Next Date** Column or the **Overdue** Column. This will create an activity for the user for the specific instance of the cycle which must then be completed, and the call report notes added. The user must click on the **Save** button to save the information to the system.

That activity will then appear in either the **Scheduled Activities** panel (if the user didn't complete the activity) or in the **Completed Activities** panel (if the user completed the activity) on the **Edit Company** page.

4.7.2.2 From the Diary Planner

The Cycles created will appear on the **Diary Planner** in either the Task section or the Appointment section, depending on their settings. All cycles will be displayed in blue and be prefaced with the cycle icon ⟳.

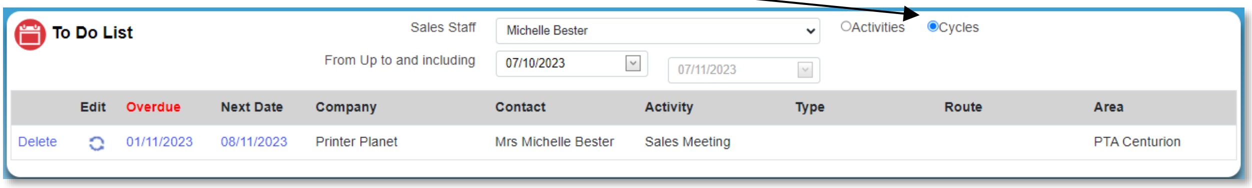


To Create, Edit or Complete the Recurrence activity (thus one occurrence of the cycle), click on the **Activity**. The user will then be directed to the page to update the relevant occurrence (activity).

4.7.2.3 From the To Do List

From the **To Do List** page, the user can see all the cycles that have an occurrence due.

On the **To Do List** page, click on the **Cycles** radio button to change the view of the **To Do List** page.



To **Edit** the Cycle (the series), click on the blue icon on the left of the cycle. This will direct the user to the **Edit Cycle** page, where they can make the necessary changes (i.e. the recurrences or activity description).

To Create, Edit or Complete the recurrence activity (one occurrence of the cycle), click on the **Date** link in either the **Next Date** Column or the **Overdue** Column.

This will direct the user to the **Add Activity** page to add in their feedback or notes on the activity, and then click on the **Update** button to save the information to the system.

5. Practical Activity

Please use the test company you created during the training session.

The Activity will cover the following concepts:

- Adding a Contact person.
- Creating Activities (Task & Appointment).
- Completing Activities.
- Adding a Cycle.

We recommend reading through the whole activity before starting:

The company, Training Name (the one you created earlier in the training, i.e Training Allison), has appointed a new sales manager.

You will need to meet with the new sales manager and present a demo of your company's product to persuade him to purchase.

On Training Name's website, the new sales manager's details have been uploaded.

- Peter Gelden
- Sales Manager
- Tel: 011 345 7890
- Cell phone: 088 900 2010
- Email: peterg@trainingname.co.za
- Website: www.bluwave.co.za

Use the above details and create the following under the training company you created during the training session:

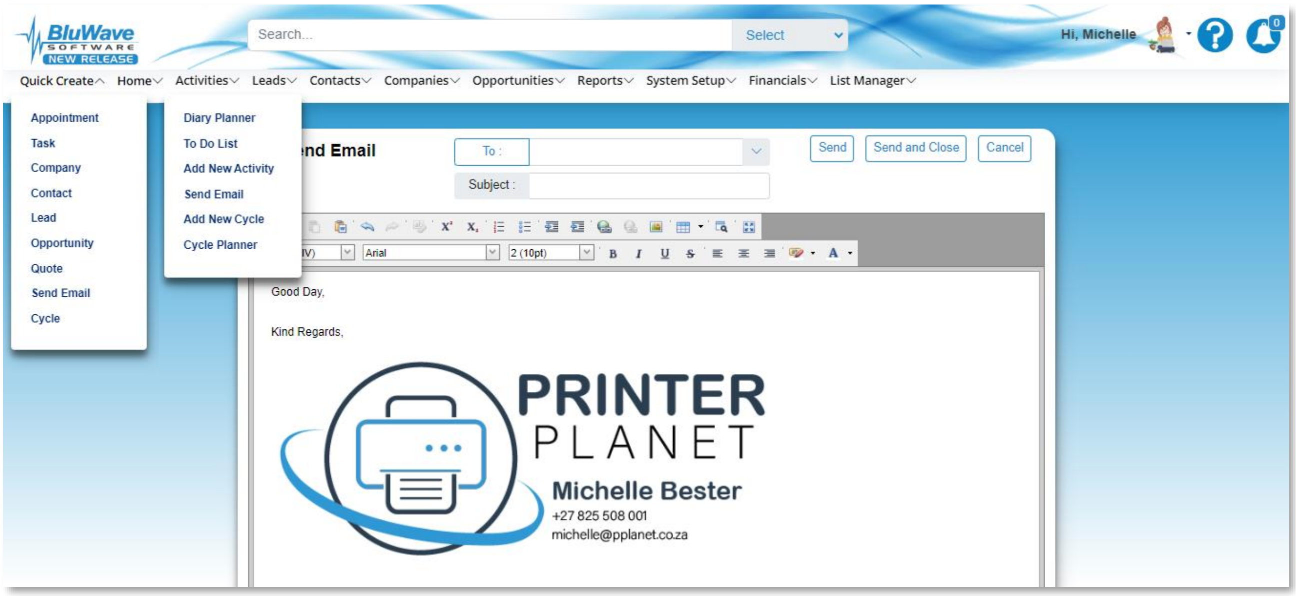
1. Create Peter as a contact.
2. Set up an appointment with Peter for next week Wednesday to present a demo of your company's product (any time may be used).
3. Complete your appointment call report. After having an excellent presentation, Peter was interested, he had some queries where he wanted to know if the product could be ordered in bulk and could the colour of the one product be changed to bright pink.
(For training purposes please change the date of the appointment created for next Wednesday to yesterday- this is to simulate the completion of an activity).
4. Create a telephone call (task) that needs to be done in 3 working days.
5. Create a recurring activity with Peter where you need to visit him every second Friday for 4 occurrences (any time and duration may be used) (Optional: add an Invitee).

6. Email Functionality

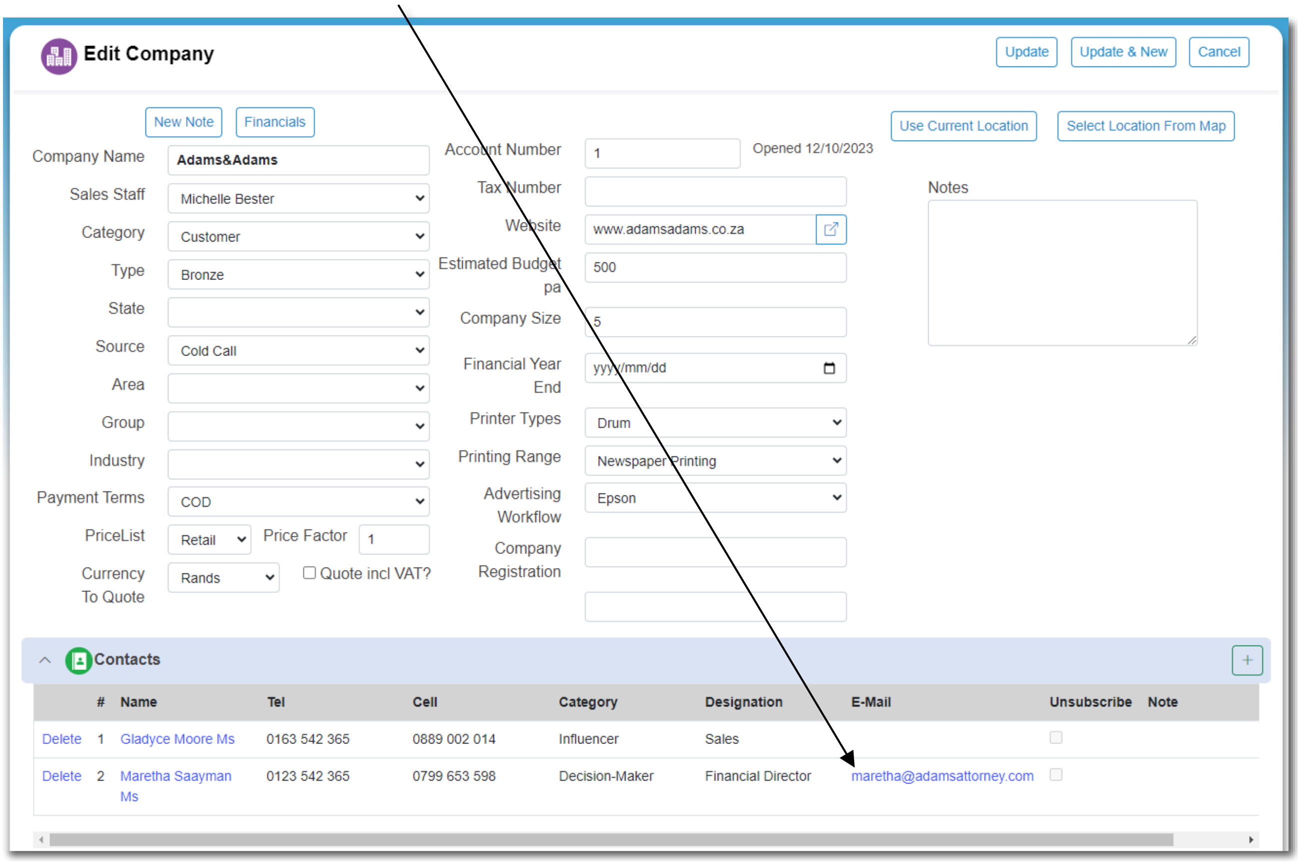
6.1 Sending Emails from BluWave

BluWave CRM allows the user to send emails to clients, this also saves a copy of the email sent under the **Completed Activities** panel in the **Company** page.

To send an email, click on the **Send Email** option under **Activities** menu, or the **Send Email** option available under the **Quick Create** menu.



Alternatively, click on the **email address** hyperlink on the **Contacts** panel of the **Edit Company** page as shown below to email a specific contact person (which can also be found under the **Contacts** tab).

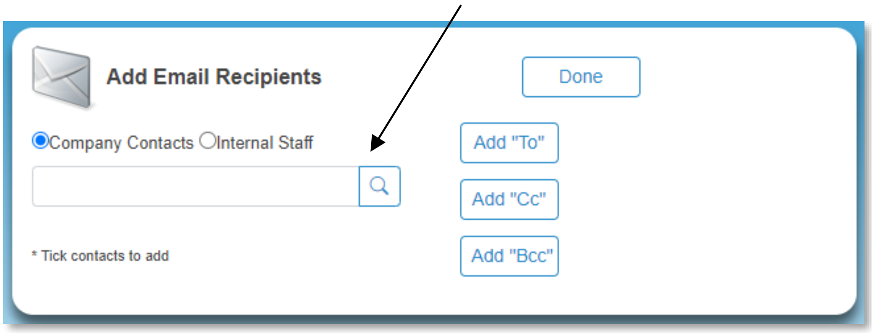


On the **Send Email** page, the user must add the recipients to which the email should be sent.

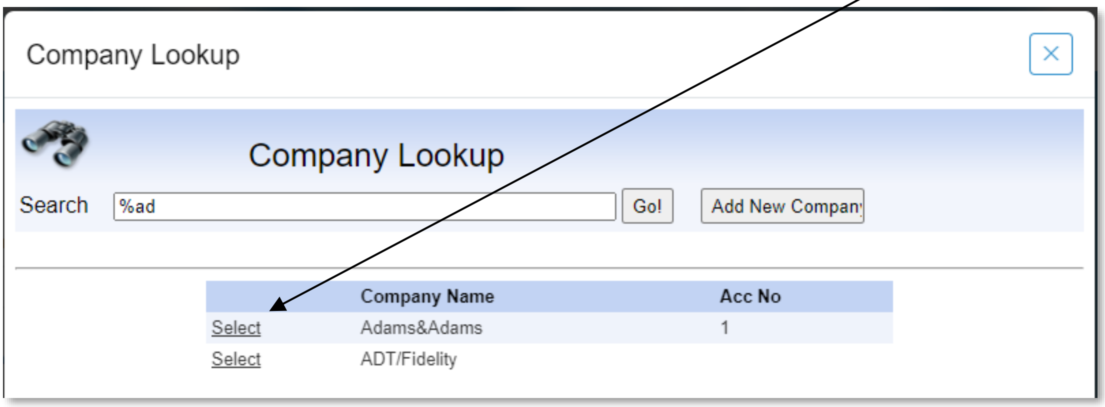
6.1.1 Adding Recipients to the Email

Step 1: Click on the **To** button. All three these buttons will direct the user to the **Add Email Recipients** page.

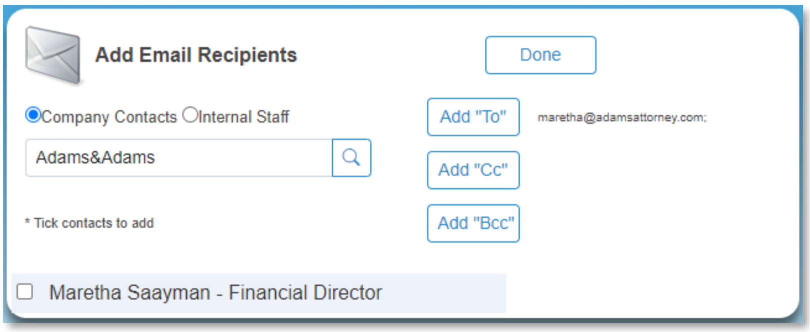
Step 2: Search for the company under which the contact person is saved.
Open the **Company Lookup** screen, by clicking on the **Magnifying Glass** icon.



Step 3: Type in the name of the company in the **Search** field and click on the **Go** button. The user would need to type in at least the first two characters of the company name. Click on the **Select** link on the left of the appropriate company.



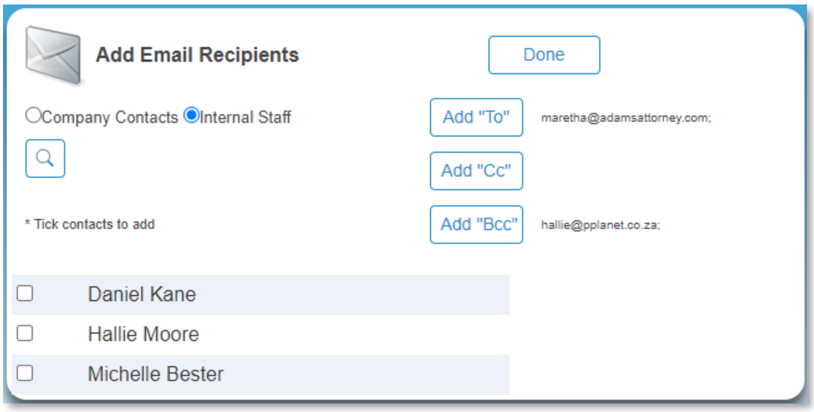
Step 4: Add the **Contact** to the relevant section of the email.
All the contacts at the selected company with an email address will display, select all the contacts that are to be included in the **To** section by ticking the checkbox and then clicking the **Add "To" button**. Repeat for **CC** and **BCC.**



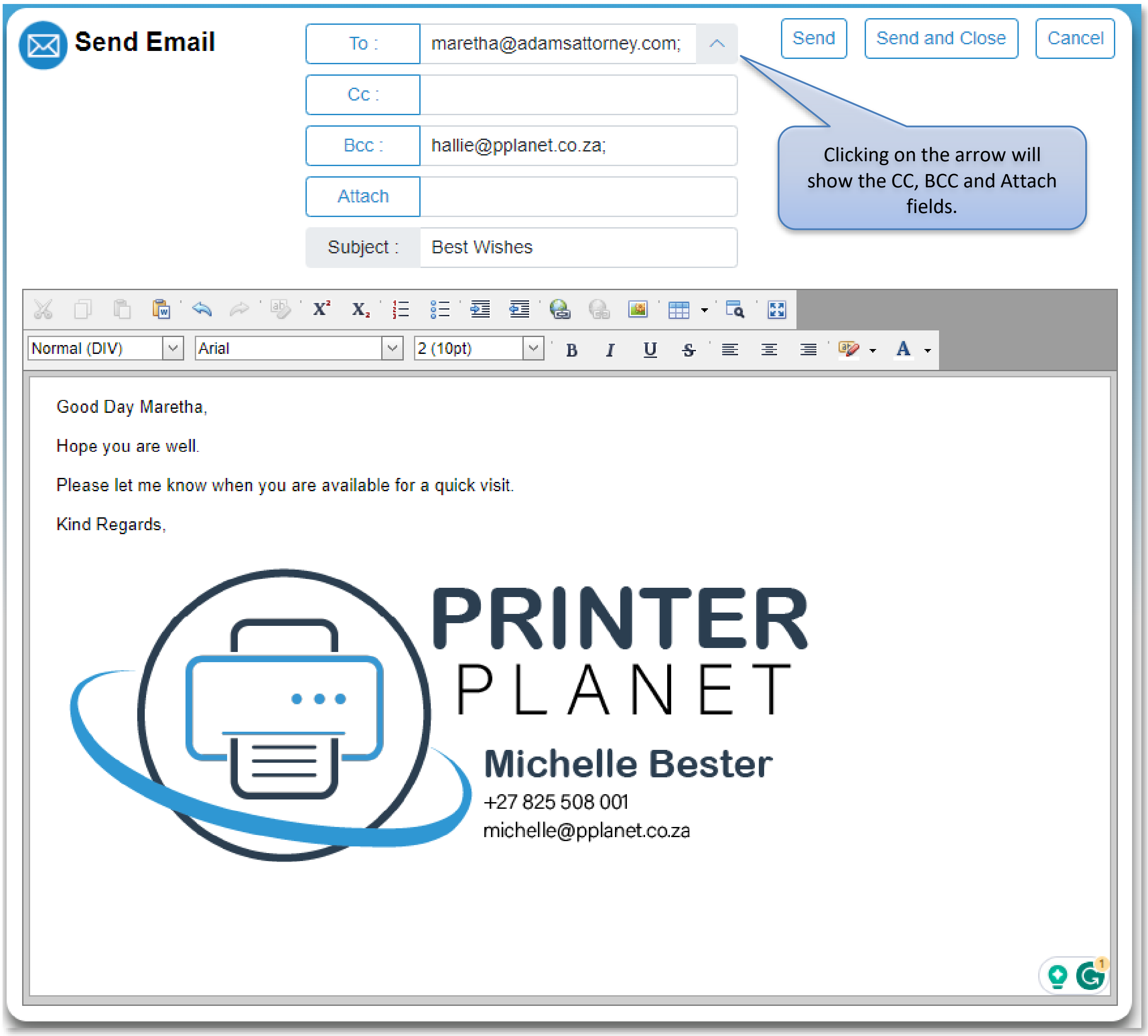
The user may click the magnifying glass again to select additional companies to email if required.

Step 5: To include internal staff as recipients on the email, select the **Internal Staff** radio button and this will show a list of all the users in the BluWave CRM system.

Add the required recipients by ticking on their checkboxes and adding them to either **To, Cc** or **Bcc** section.



Step 6: Return to the **Send Email** page.
Make sure that all the intended recipients are listed on the right-hand side.
Once the user is sure all the intended recipients have been added, click on the **Done** button at the top of the page.

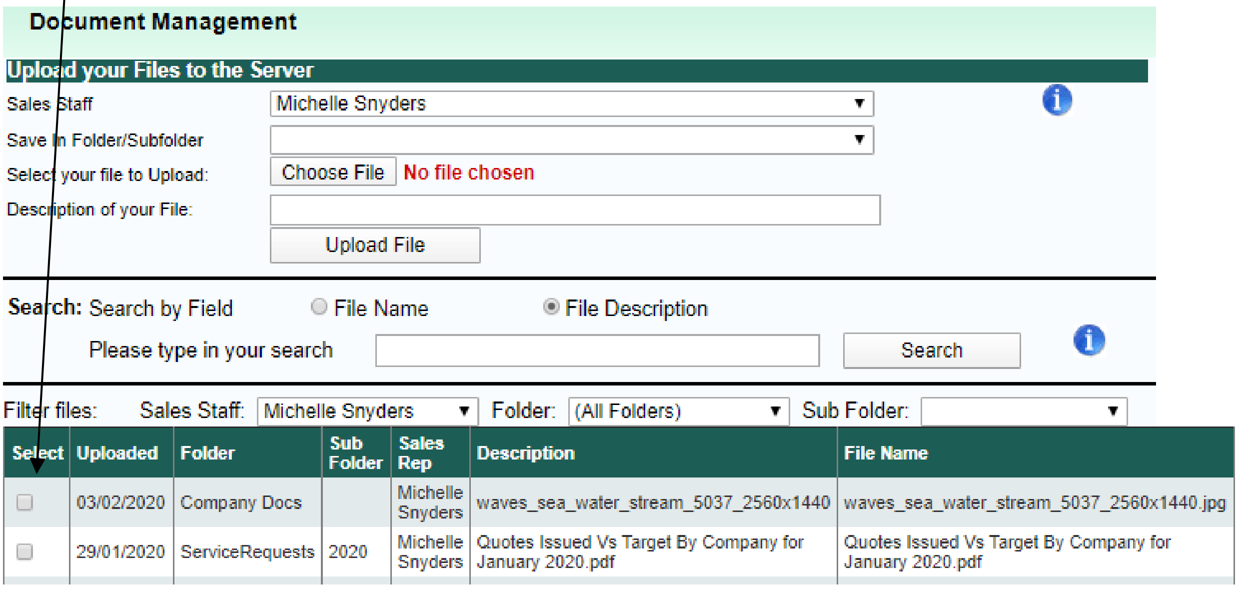


6.1.2 Attaching a Document to the Email

After clicking on the **Attach** button, the **Document Management** page will open, and the user can then do one of two things:

1. **Upload a new file** to the system (Step 1 – 3 as described below) and select the document from the server (the bottom portion of document management page).
2. **Select an existing file** from the server (the bottom portion of document management page).

To attach the required file to the form, find the specific file and tick the checkbox on the left side of the page (all the relevant files) and then click on the **Done, Return to Email** button.

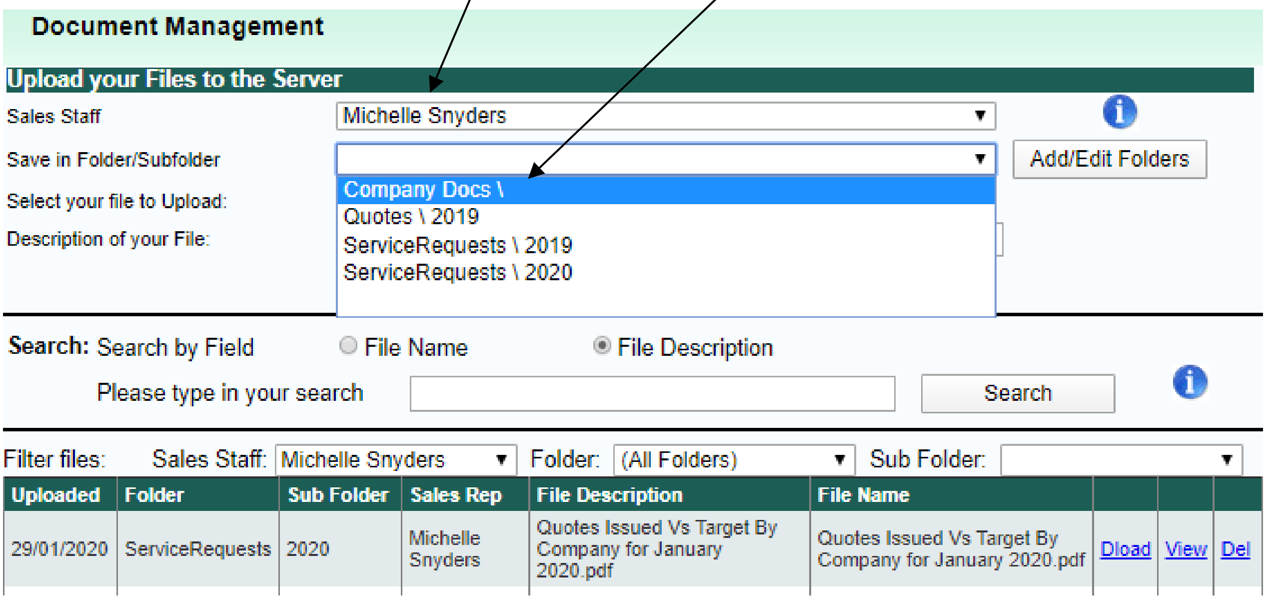


6.1.2.1 Uploading a New file to BluWave

The process to upload a document to the server, and then attaching it to an email or any one of the pages in Bluwave will be the same throughout.

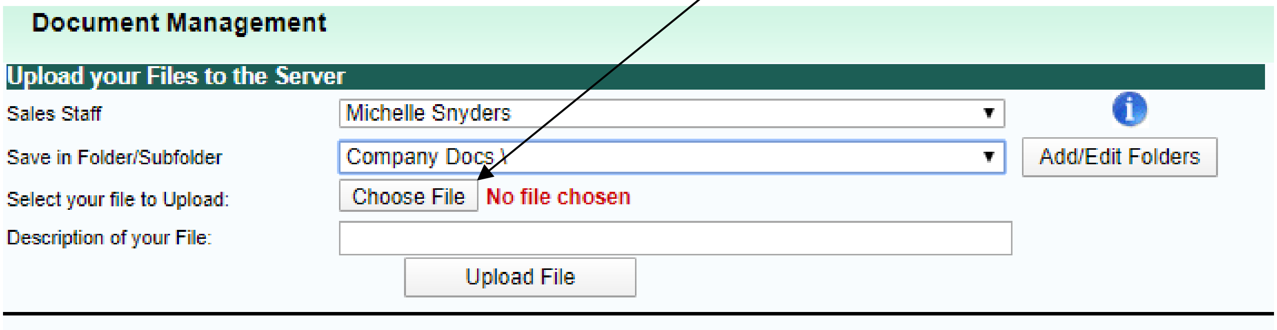
Step 1: Where to save the File on the Server

The user will choose under which **sales staff** and then which **folder** to save the file under on the secure Bluwave server.

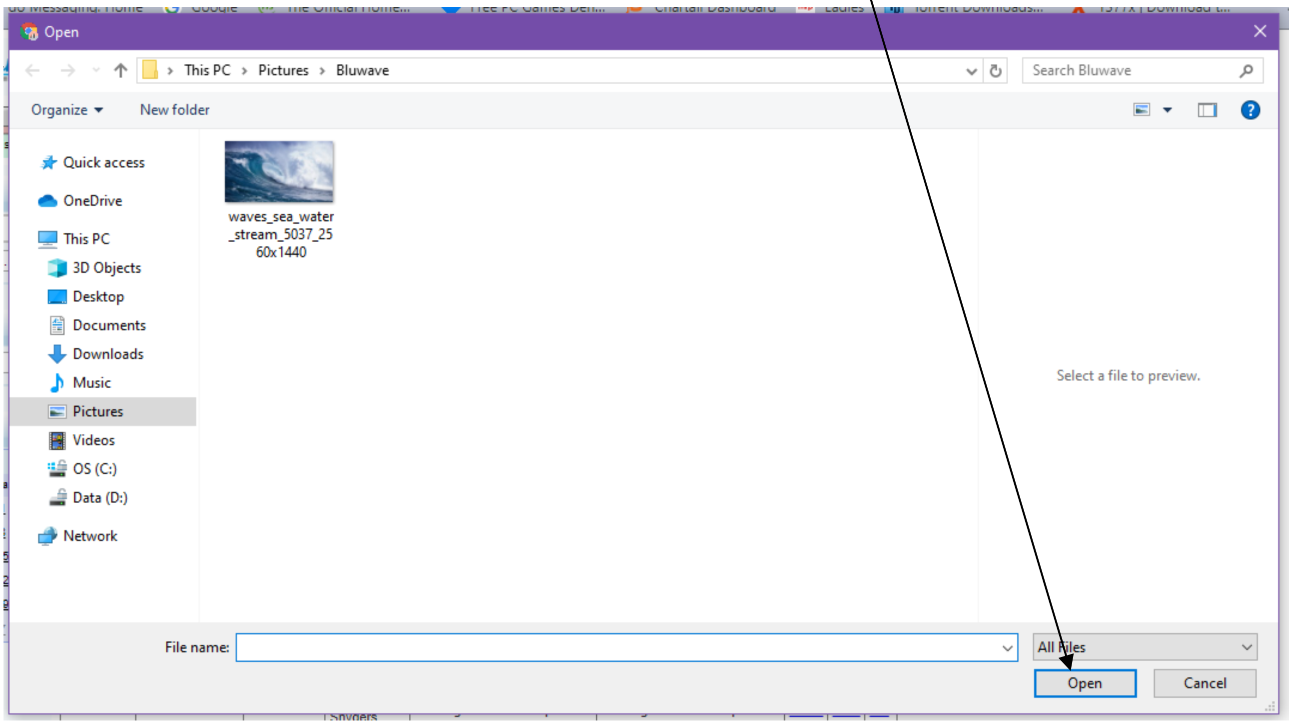


Step 2: Finding the File on the Users' Computer

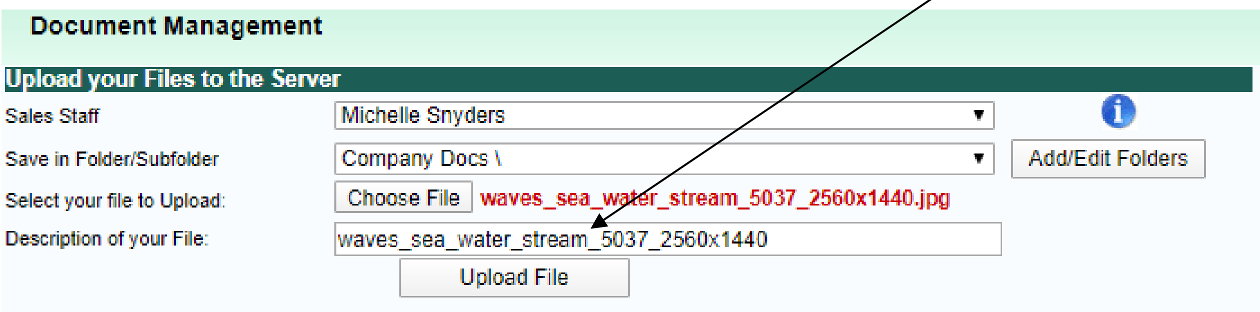
After selecting the destination folder click on the **Choose File** button to search for the required file on your computer. Only files with a file size smaller than 8MB will be uploaded.



The user would then select the file on their computer and click on the **Open** button at the bottom of the screen.



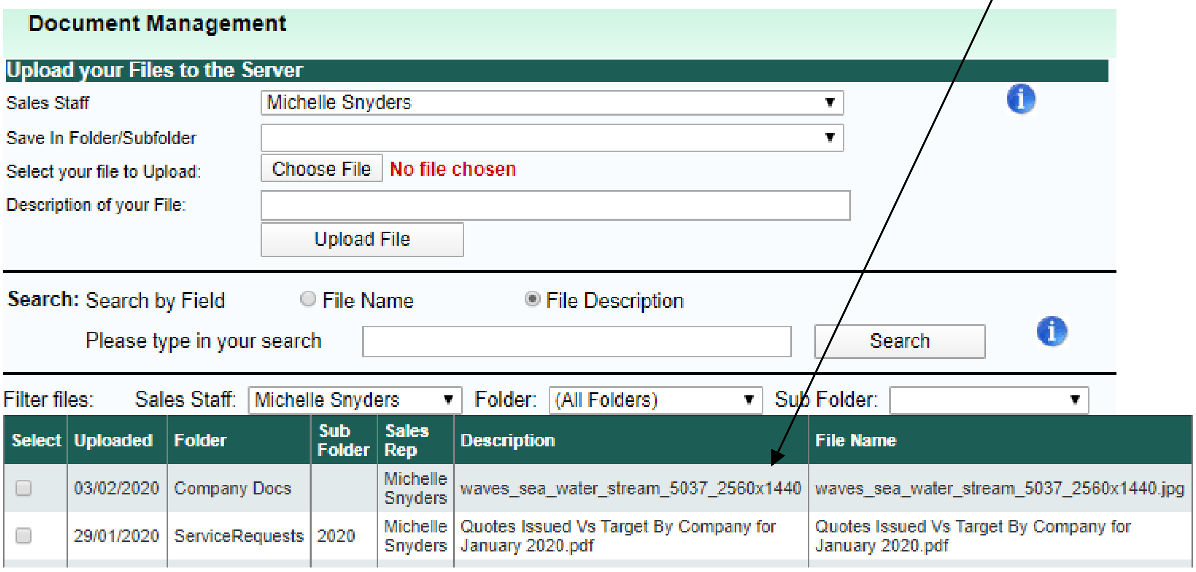
After clicking on the **Open** button, the name of the file will appear in the **Description** field.

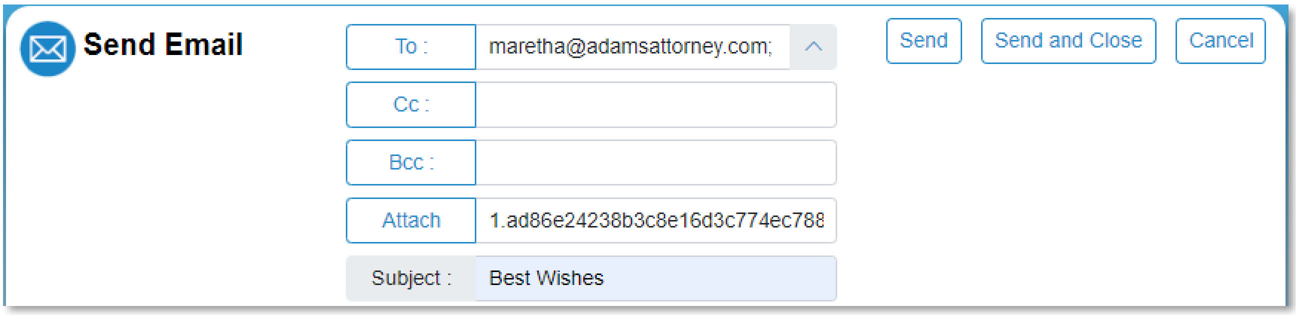


The user could change the **Description** of the file or leave it as is.

Step 3: Uploading the File to the Server
Click on the **Upload File** button to save that file on the BluWave secure server.

Once the file is saved, the user will be able to view the file in the folder where they have saved it (in the bottom portion of the **Document Management** page).





6.1.3 Sending the Email

After adding the recipients and the relevant documentation (if applicable), the user would need to add in a **Subject** line. BluWave will not send an email without a subject line.

If the **user's email signature** is added to Bluwave, it will appear in the body of the email, and they would simply need to add their message to the body.

Click on the **Send** or **Send & Close** button to send the email.

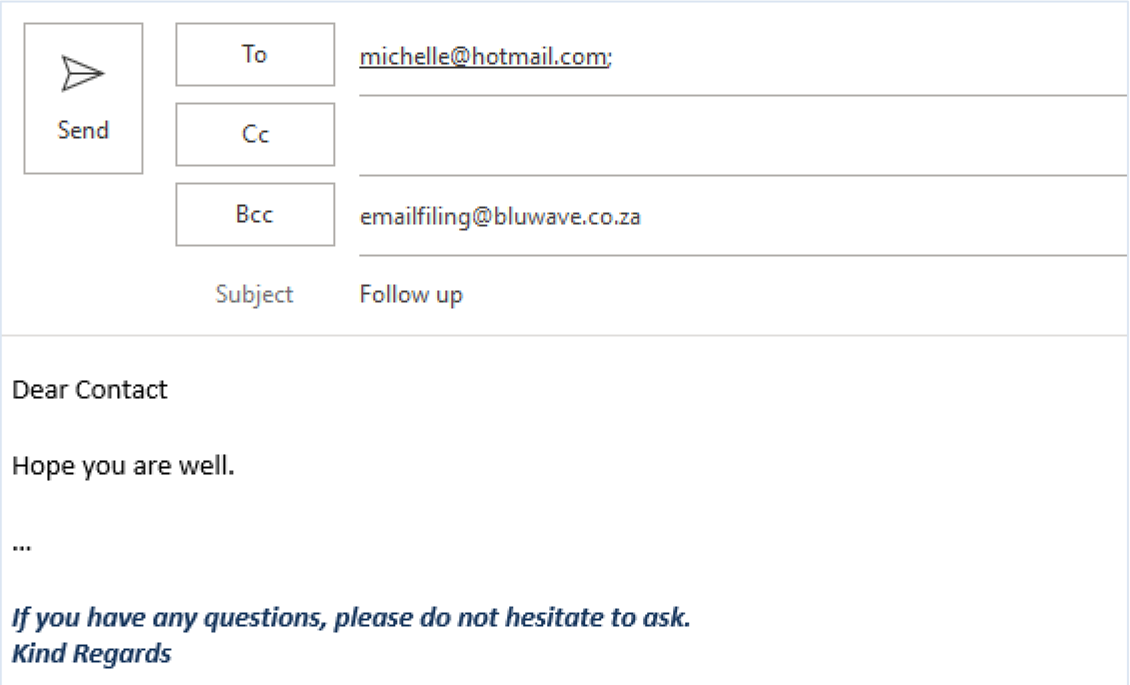
6.2 Email filing

The user can also file emails from any email software program – either desktop email clients or web-based email client software including, but not limited to: Outlook, Lotus Notes, GroupWise, and Google Mail.

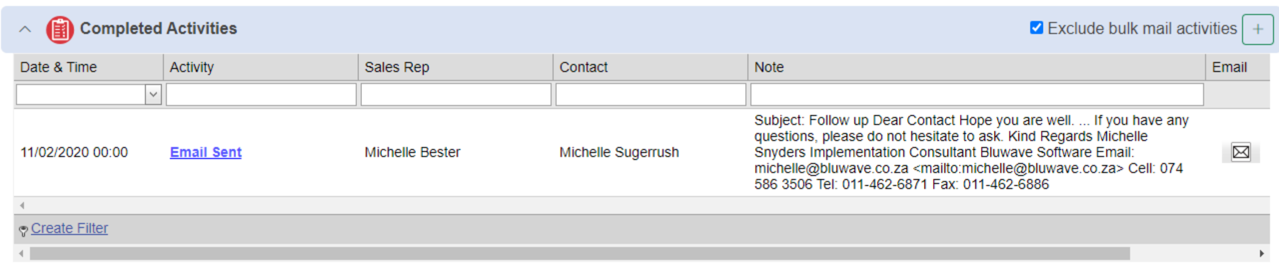
6.2.1 Saving an Outgoing Email

If the user is sending an email from their email client to one of their contacts, and wants to record the email in BluWave, simply **BCC** the email to the following email address: emailfiling@bluwave.co.za.
BluWave CRM will then save the email as a completed activity under the client, with an Email Sent activity type.

NB: To save successfully, the contact person needs to be already loaded on BluWave with this email address.

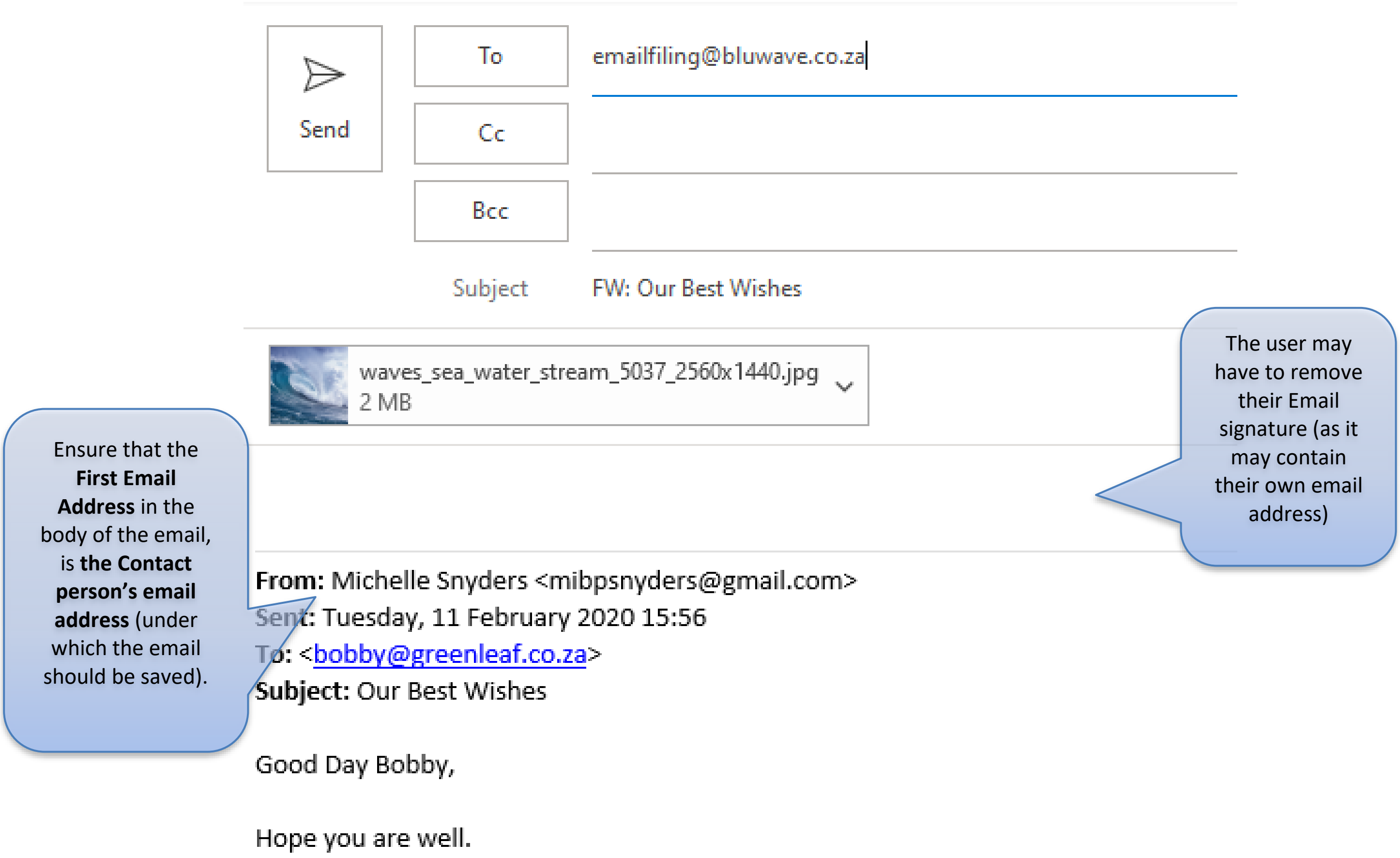


In ***BluWave*** the email will be shown in the **Completed Activities** panel on the **Edit Company** page with an **Email Sent** activity description:



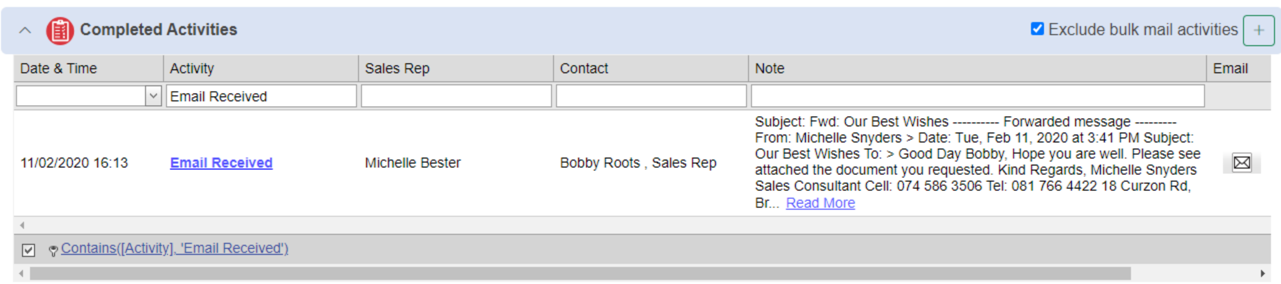
6.2.2 Saving a Received Email

To save an email that the user has received in their email client, **Forward** that email to **emailfiling@bluwave.co.za**.

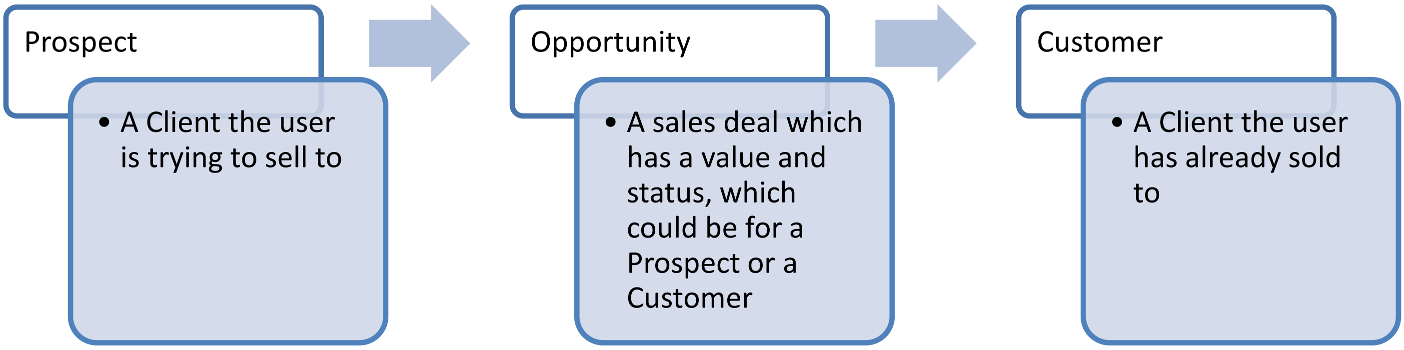


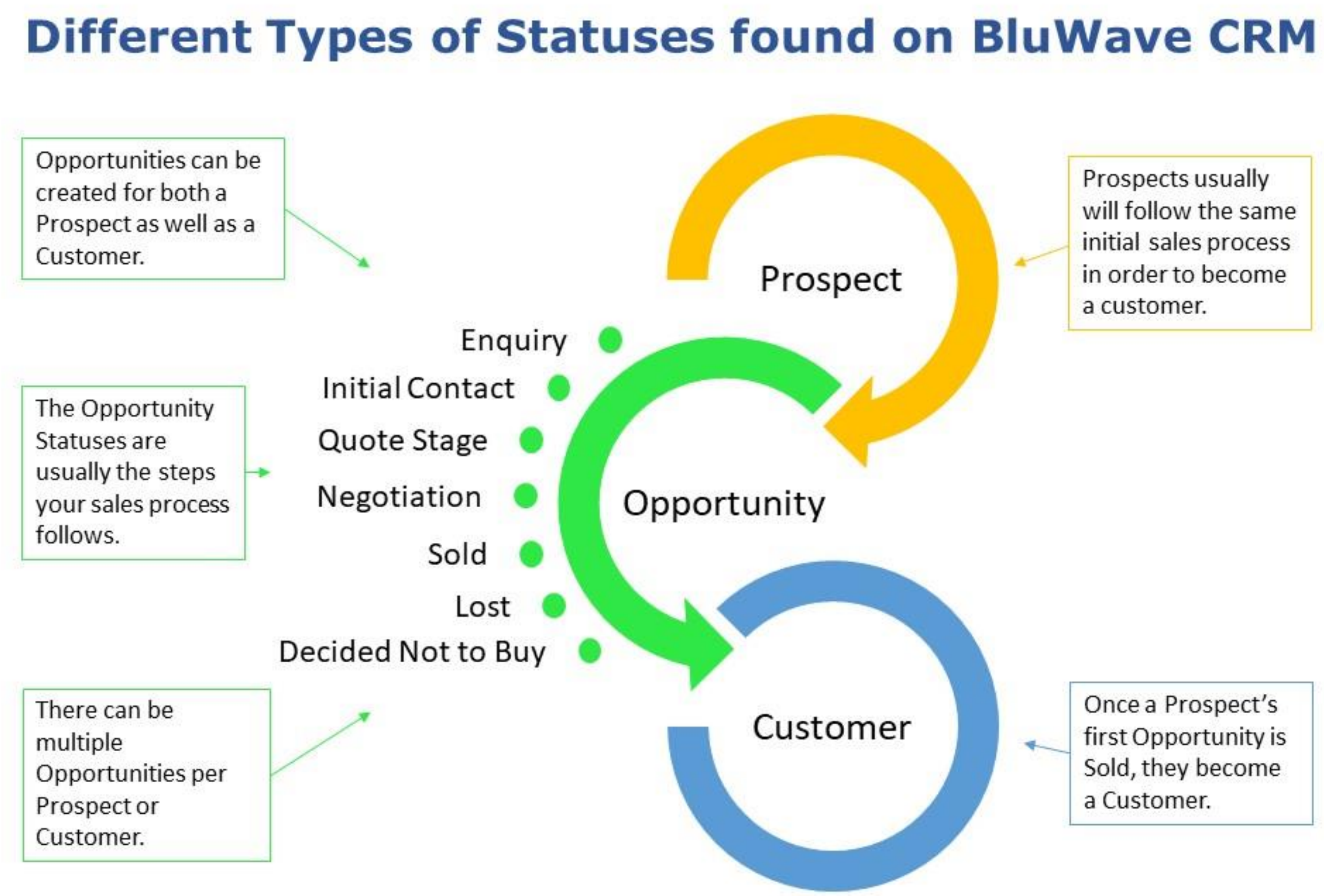
BluWave CRM will then save the email as a completed activity under the company's **Completed Activities** panel with an **Email Received** activity description.

Again, the contact from whom the email was received from needs to match an email address on ***BluWave CRM***.



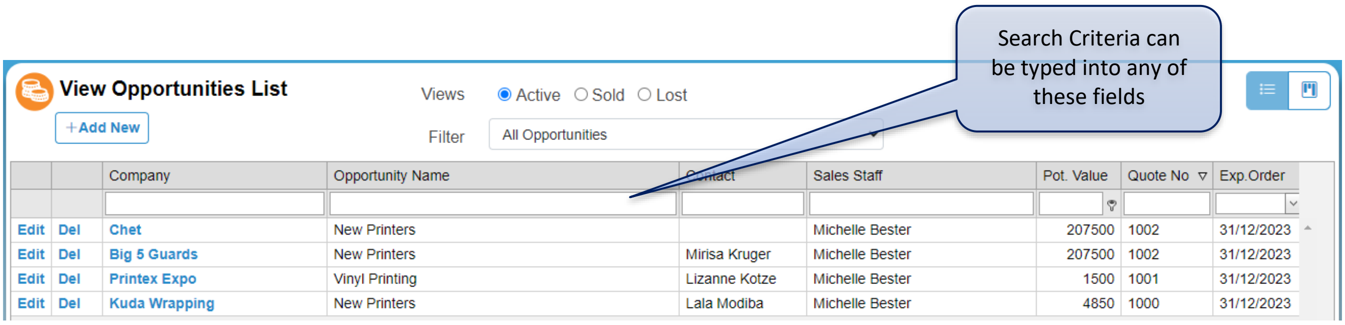
7. Opportunity Tracking





7.1 View Opportunities- List

This page shows the list of Opportunities by their **Active, Sold,** or **Lost** statuses.



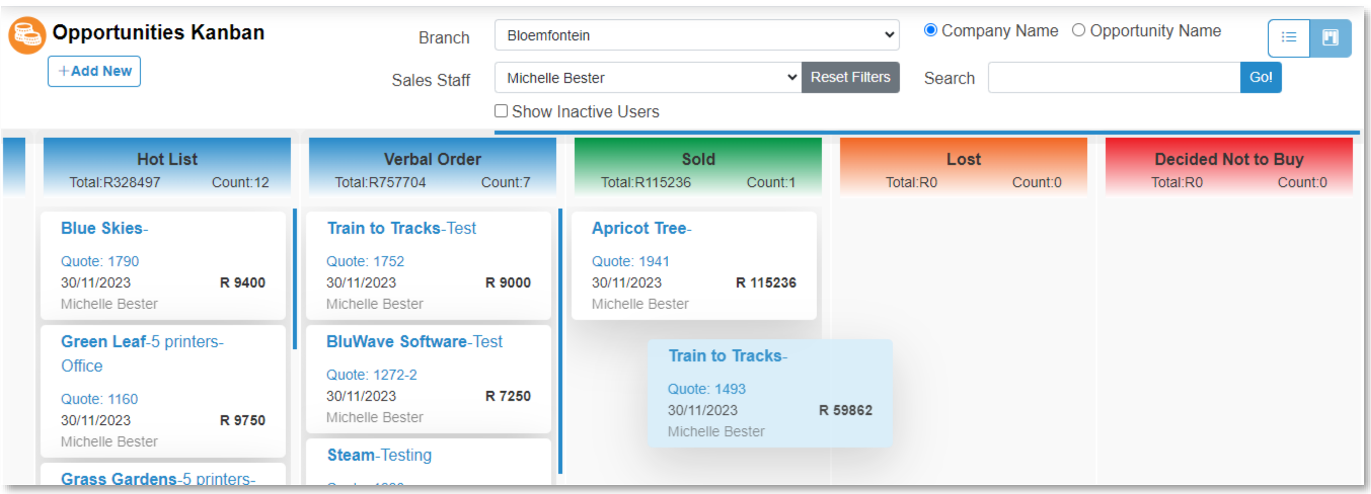
The filters on the right can be used to access opportunities as follows:

- **All Opportunities** - will display a list of all opportunities created on the system.
- **Recently Added** - will display only the last 5 added opportunities created on the system.
- **My Opportunities** - will display a list of opportunities entered by the user currently logged into the system.
- **Branch Opportunities** - will display a list of opportunities for the branch the user is assigned to.
- **Closing this month** - will display all opportunities which have their expected order day set for the end of the current month.
- **Closing next month** - will display those opportunities with an expected order date set for the end of the next month.

To open an opportunity, select the **Edit link** next to the relevant opportunity.

7.2 View Opportunities- Kanban

This page shows all the opportunities per status in the sales process. Each column shows the total monetary value for all the opportunitiesin that status as well as a count of the number of opportunities allocated to that status.

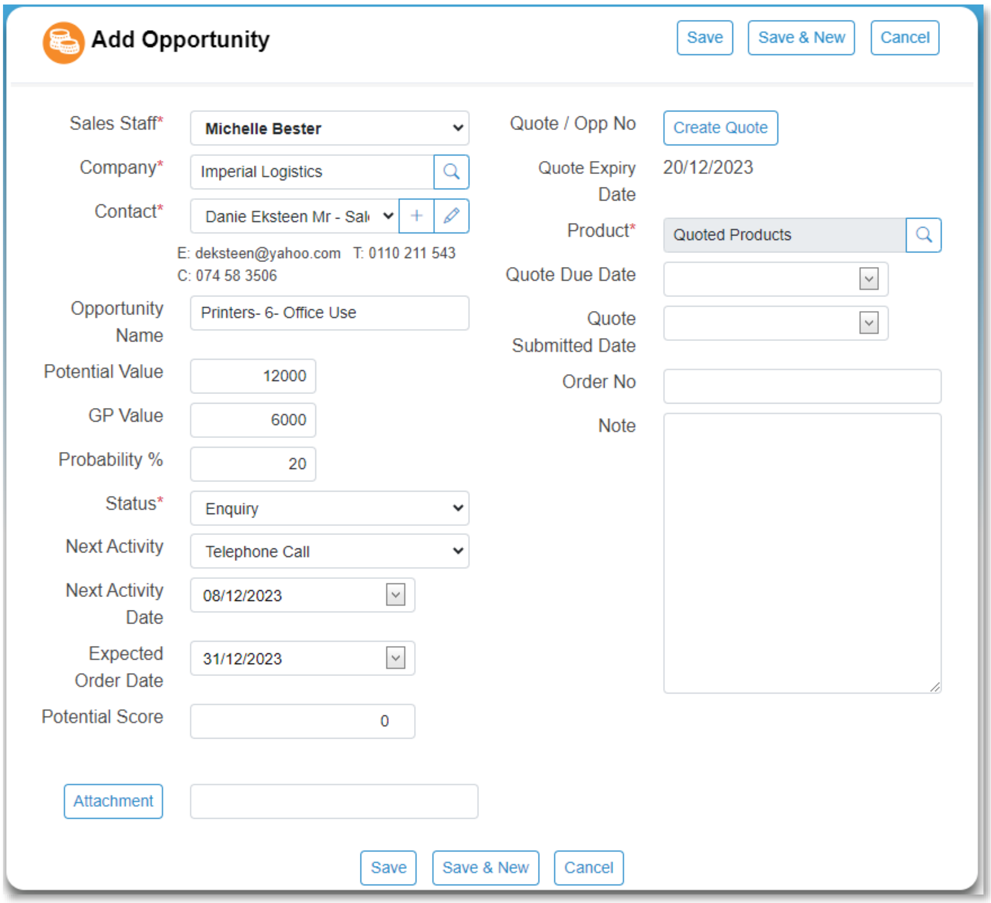


On this view the user would be able to **scroll horizontally across the page** using the blue scroll bar across the top, to view all the opportunity statuses, and **click and drag their opportunities** from one status to another as the sales progresses.

To update any other details on the opportunities, simply left click on the opportunity card to go to the normal **Edit Opportunity** page. Or to go to the **Edit Company** page, click on the **Company Name** on the opportunity card.

7.3 Add an Opportunity

Click on **Add New Opportunity** to create a new sales opportunity. This can also be done from the **Edit Company** page, or the **Quick Create** menu.

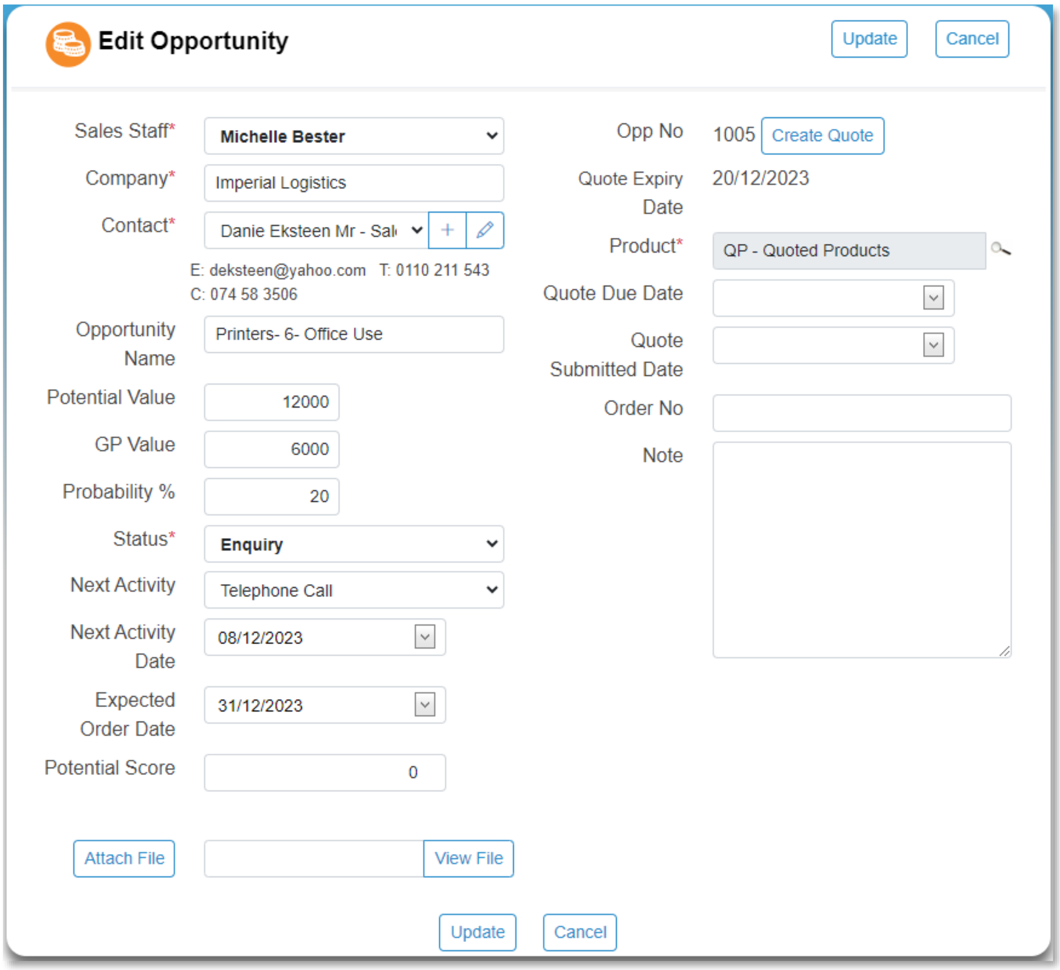


On this page the user will need to record the following information:

- **Sales Staff:** who is responsible for the opportunity.
- **Company & Contact:** which client and the specific contact the opportunity is listed under
- **Opportunity Name:** name given to the opportunity for internal reference and reporting purposes. (Will become the quote description).
- **Expected Order Date:** the date on which the sale is expected to be closed (defaulted to the end of the current month).
- **Product:** the main product which has been quoted(defaulted to quoted products).
- **Note:** Internal notes made for reporting purposes.
- **Attachment:** Used to attach an external quote, or any other document to the opportunity.
- **Status:** Where the opportunity is currently sitting in the user pipeline.
- **Probability:** The likelihood of the sale being successful closed (0-100%).
- **Value:** Turnover value.
- **GP Value:** Gross Profit value (if required).
- **Next Activity & Activity Date:** First follow up booked for this opportunity and when it will occur.
- **Due Date:** The date the quote is due to be submitted to the client.
- **Quote Submitted:** The date the quote was sent to the client.

Click on the **Save** button to capture this opportunity and should the user wish to create another opportunity (for the same client) click on the **Save & New** button. This will clear the page and allow the user to enter the new opportunity's details.

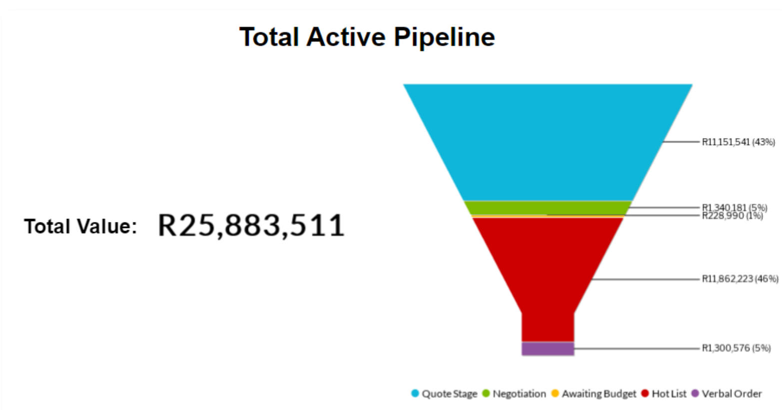
7.4 Edit an Opportunity



On this screen the user can change the expected order date, enter the potential sale value and probability of this opportunity.

- The **Status** field is used to monitor the opportunity's progress. This is very useful for reporting purposes.
- A file related to the opportunity can be attached if required (such as an external quote).
- Click on the **Update** button to save any changes.

Each salesperson can view his pipeline visually on the BI platform (or by accessing the Active Pipeline embedded BI dashboard on the Home menu option).



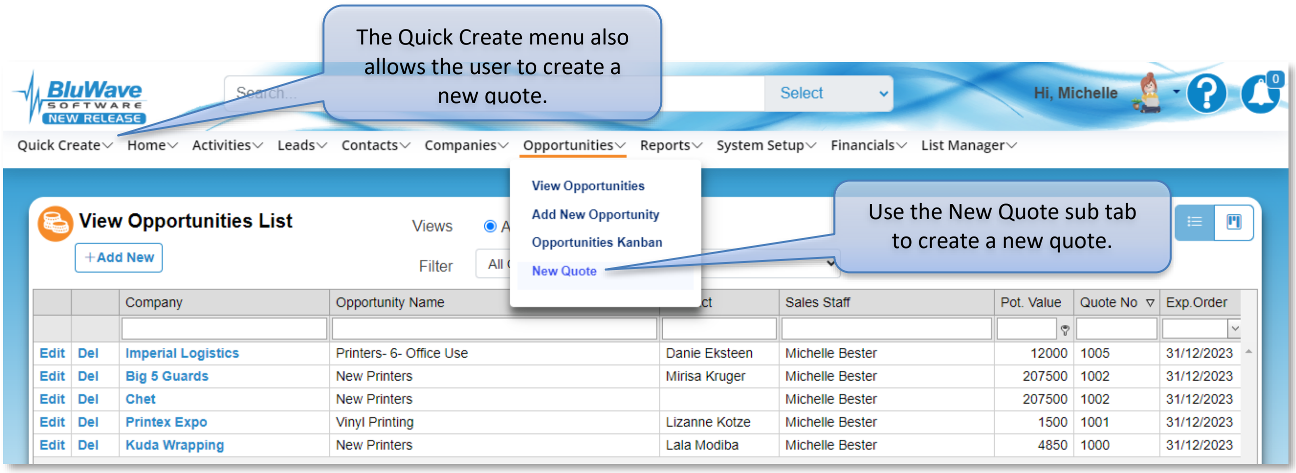
- Opportunity Tracking allows management of **New Business Acquisitions**.
- Define the sales process in order to track the progress of the user's sales pipeline.
- The system generates a new business forecast based on expected order dates and sales probability percentages.

8. Quote Automation

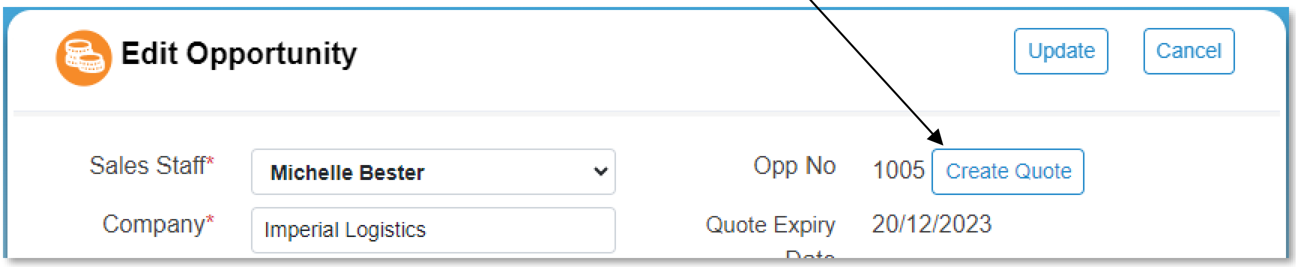
The **Quotes Automation** function generates a quote that can be emailed as a .PDF file to the customer.

When a quote is generated, the system automatically creates a related opportunity in the users' sales pipeline, at the same time a follow-up activity (action item) is also generated.

Use the **New Quote** sub tab under the **Opportunities** tab to create a quote, alternatively use the **Quick Create** menu. The user can also create a quote by clicking on the **New Quote** button under the Company's opportunity panel.



Alternatively, if an opportunity already exists then the **Create Quote** link on the **Add** or **Edit Opportunity** page may be used.



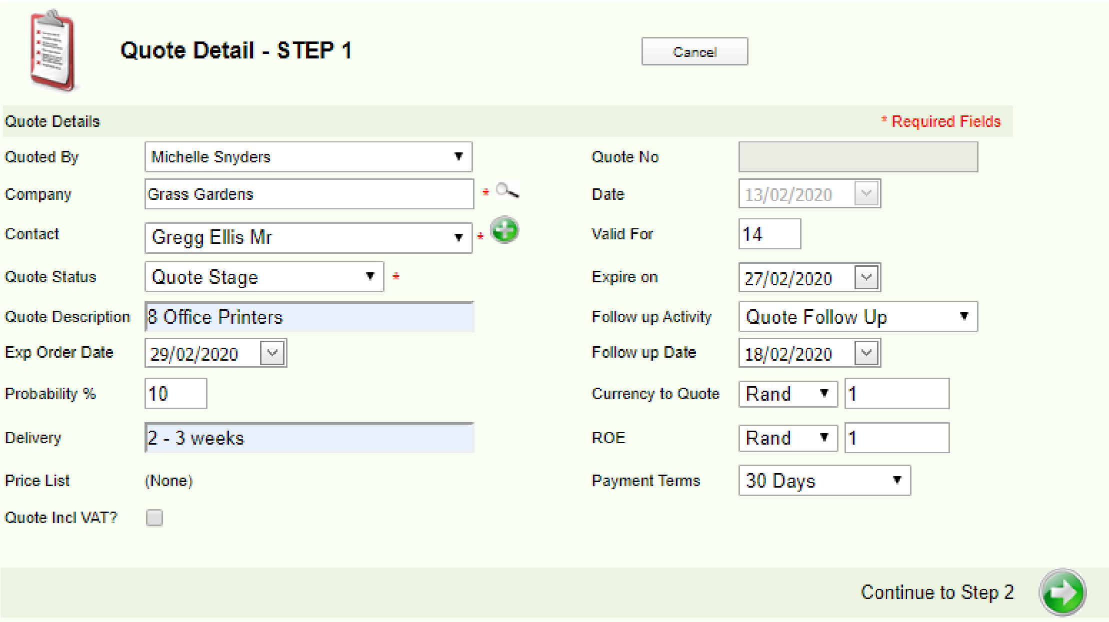
8.1 Step 1: Client Details

Complete the Quote Header details and then proceed to Step 2.

Company - select the company the quote is being generated for by clicking on the **magnifying glass** button.

Contact person– select from the list of contacts at this company.

Quote Status – select the current status of this opportunity (defaulted to **Quote Stage**).



Quote description – this is used as the subject line of the emailed quote. It should indicate what product/ service the client is being quoted on.

Expected Order Date – date when the user expects to get the order. This defaults to the last day of the current month but should be changed if the sale is expected at a future date.

Probability – a percentage to indicate the likelihood of making the sale.

Delivery – allocated time for delivery of products (will only appear on the quote if it has been entered during system setup).

Quote No – the system will insert the next available quote number onto the quote automatically.

Validity – shows how long the quote is valid for in days, this will automatically update the **Expires On** date.

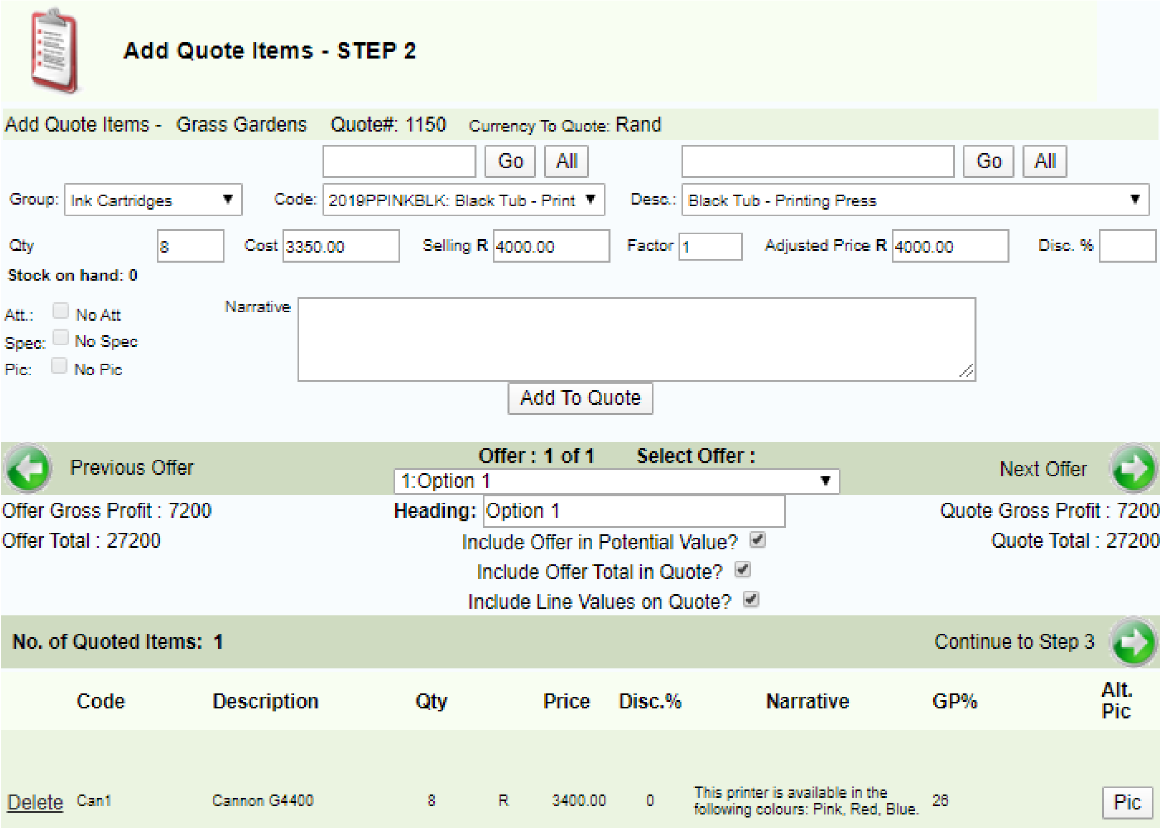
Follow up Activity – select the activity and date on which the initial follow up on the quote should take place. The activity will appear in the user's diary planner.

Currency to Quote/ Rate of Exchange – select the currency the quote should be generated in, and the rate of exchange from the list. These must be configured under the System Setup beforehand; the system will automatically default to the system currency.

Payment Terms –select the payment terms from the list. These also must be created under System Setup.

Click on the Continue to Step 2 button once done.

8.2 Step 2: Add the Quote Items



Select a Product Group – if the user selects from this dropdown, then the product code and product description dropdowns will be filtered by the selected group. If the user does not select a group, the product code and product description dropdowns will contain all products.

Select a Product Code or Product Description – select the item that should be added to the quote using either the product code or description dropdown.

Quantity – enter the number of items required. This should be adjusted before moving on to make changes to the price fields.

Price – the cost price (if set up on the product list) and selling price will show here.

Factor –allows the user to inflate the price of the product to cover for risks that are not accommodated for in the products costs. E.g. when transporting goods to another country, a factor of 1.2 may be used to inflate the price by 20 %. Note this is not visible to the quote recipient.

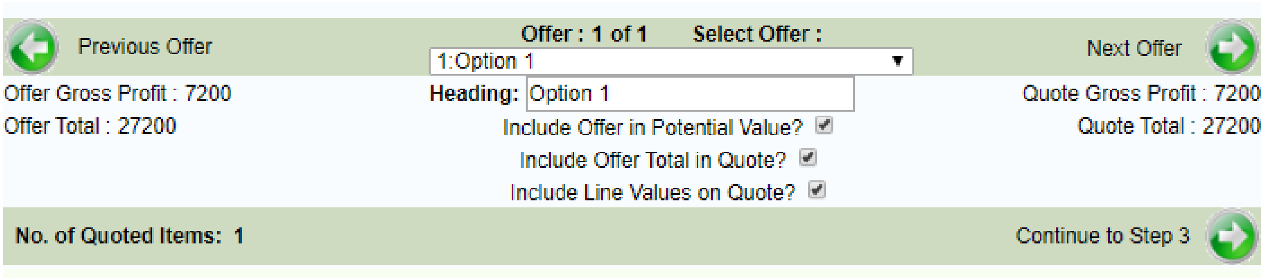
Discount – enter a discount percentage to be offered on the line item and this will be subtracted from the price.

Narrative – the product Narrative will display if it has been set up. The user can add additional relevant text to the specific product if required.

If there are any **attachments or pictures** associated with the selected product in the price list, the checkboxes to the left of the Narrative field will be checked. The user can then decide to leave them checked (which will send the attachment to the client or insert the picture into the quote) or to untick the checkbox and remove the attachment from the email and not insert the picture into the quote.

Click on the Add To Quote button – This will insert the product onto the quote and display it at the bottom of the page.

Continue to add all the items to the quote.
Before proceeding with the quote, the following should also be completed:



Heading – this is a short description of what type of products are included in this specific paragraph.

Include Offer in Potential Value? – ticking this checkbox will include the total value of this offer into the potential value of the quote on the pipeline. Note this has no effect on the quote document as seen by the recipient.

Include Offer Total in Quote? – ticking this checkbox will show the total section for this offer on the quote document.

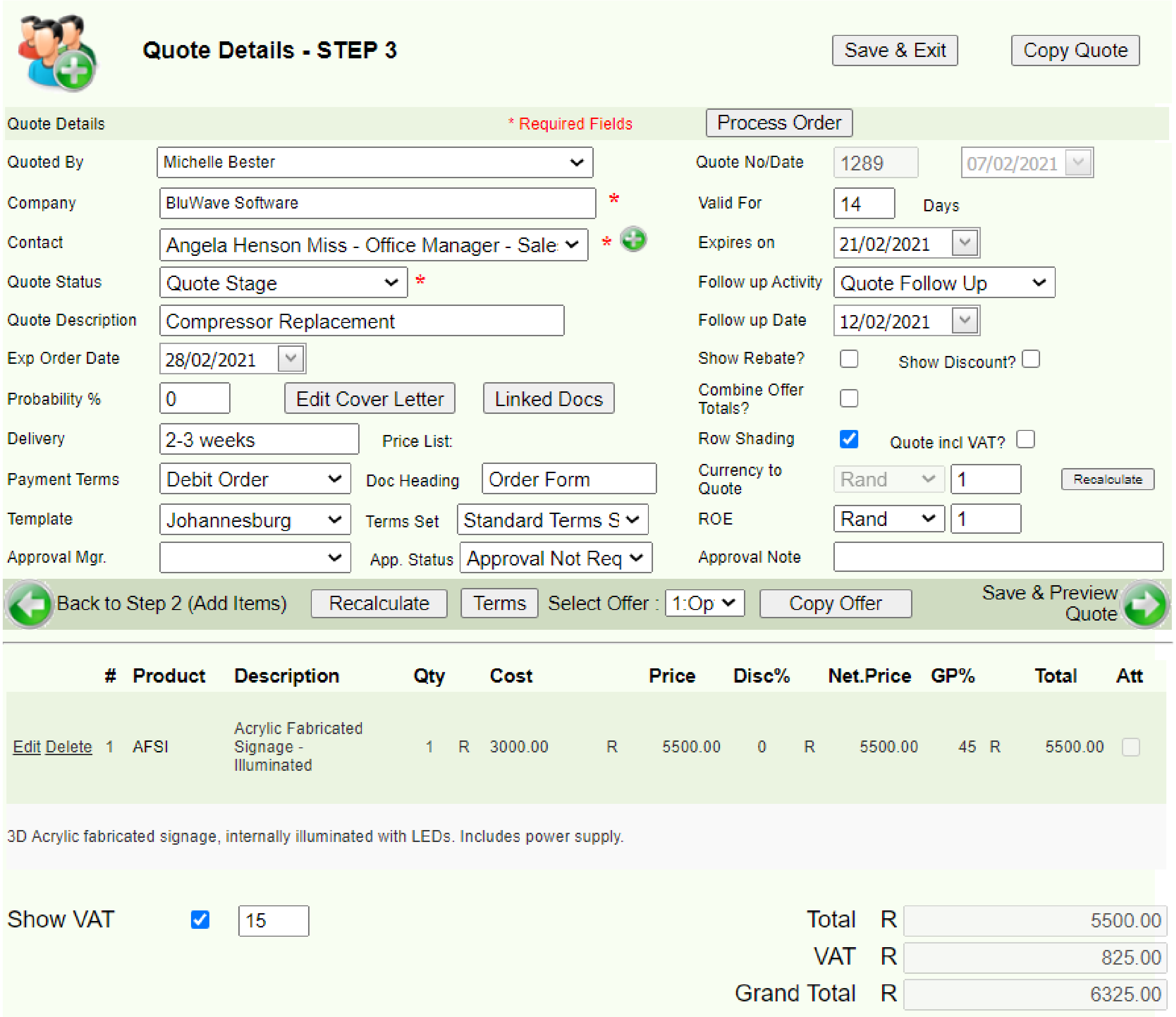
Include Line Values on Quote? – ticking this checkbox will show each items' price and total value for this offer on the quote document.

Refer to **Appendix A** for an example of what the quote document (output) could look like with the above settings.

8.3 Step 3: Finalizing the Quote

This step lists all the quoted items with a quote total. Multiple offers can also be viewed here, and the user will be able to edit or delete line items from the quote, as well as change the sequence in which line items appear.

Step 3 will also show the Quote Header details as they were on Step 1 or the Opportunity, allowing the user to change details such as delivery, should this be necessary.



Quote Status – this field should be updated to Quote Stage to update the Pipeline on the Home page with the value of the quote.

Delivery – the user can type in the estimated delivery time on this field. If set up- this can be displayed in the terms and conditions section of the generated quote.

Payment Terms – the user can select the payment terms for this quote. This can be displayed in the terms and conditions section of the generated quote if configured in the system's setup.

Template – one or more templates may be set up for each branch or product range of the company. The user needs to choose the required template for the specific quote. Templates could have different header and footer images and paragraphs.

Doc Heading – this field allows the user to edit the Heading inserted on the Quote (only applicable to Quote Output 1).

Valid For – changing the number of days the quote is valid for will automatically update the **Expires On date** and display accordingly on the generated quote.

Follow up Activity and Follow up Date – by selecting the activity and date, the user can create a follow up task in their diary to remind them to complete the specific activity related to the specific quote.

Combine Offer Totals – this adds in a Grand Total section onto the generated quote that includes all the offer totals on the quote.

Currency to Quote or Rate of Exchange – should these change, use the **Recalculate** button next to these fields to refresh the price and the currency symbol (visible after previewing the quote).

Approval Manager – if the quote requires approval before being sent to the client, the user can select an approval manager from this dropdown.

Back to Step 2 – allows the user to add more quote items and/or offers.

Recalculate – click on this button to update the line items of the quote to reflect the new pricing values on the price list in the system.

Term Sets – in cases where multiple terms and conditions have been set up the user will need to choose the appropriate set that should display on the generated quote.

Select Offer – view the different offers by selecting the required one from the dropdown.

VAT – uncheck the check box to exclude VAT from the quote or leave it checked to include it.

The following topics will be discussed later in the training manual (Heading 11).

Edit Cover Letter button – allows the user to choose from an existing cover letter to add it to the quote. The user would also be able to make changes to the cover letter before saving it to the quote.

Terms button – additional terms may be added to the quote by selecting them. These must be preloaded by the system administrator.

Copy this Offer button – allows the user to copy one offer and create a duplicate in a new offer. The user may then be able to make changes to that offer.

Copy Quote button – enables the user to duplicate the quote under the same company or copy the quote to another company.

Process Order button – allows the user to create current products and jobs from the quote.

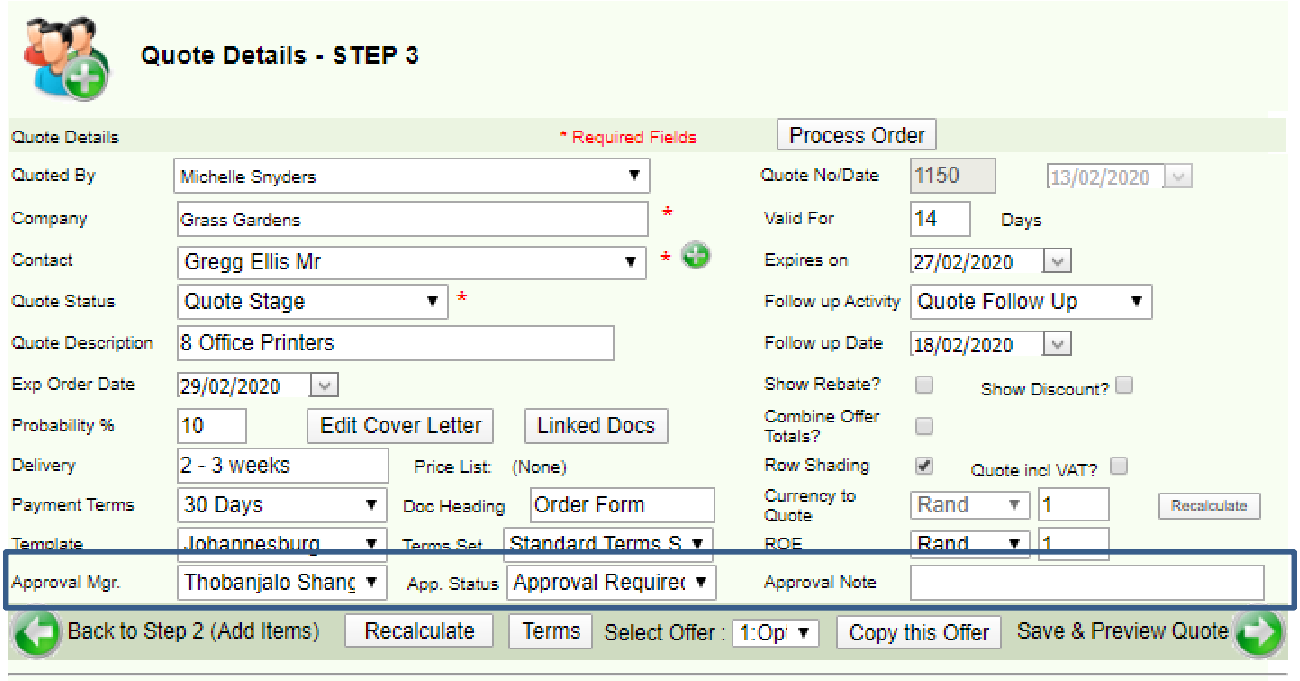
Click on the **Save & Preview Quote** button to generate the quote or click on the **Save & Exit** button to return to the **Opportunity** page.

8.3.1 Quote Approval

8.3.1.1 What is required from the User

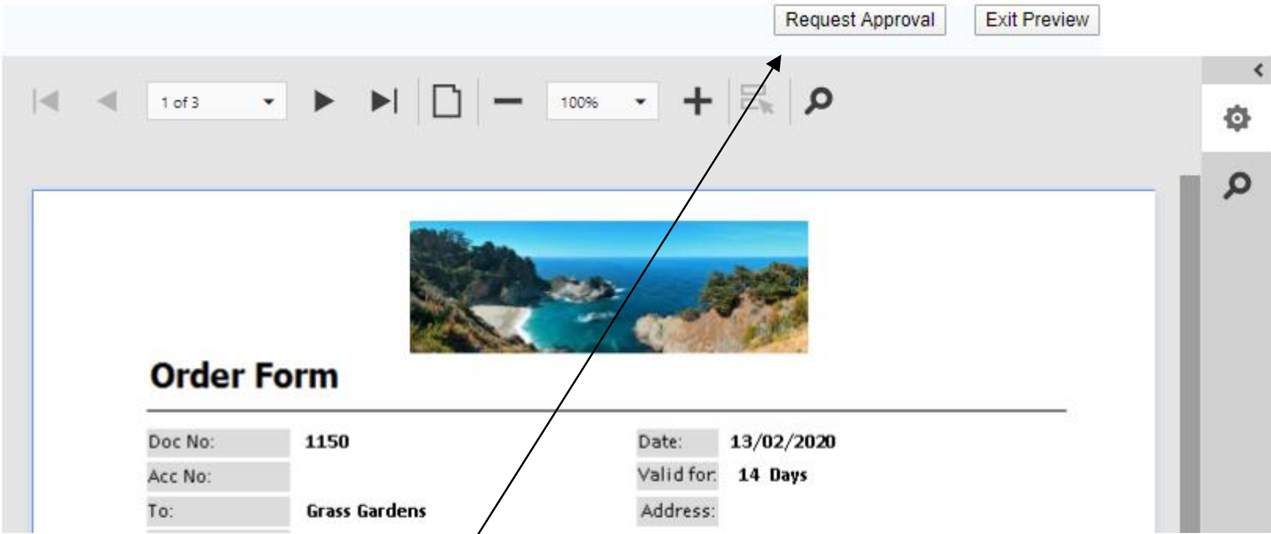
If a quote requires approval, the user will not be able to email or print the quote without approval.

On Step 3 of the Quote process, the user must ensure that their **Approval Manager** is selected and may even enter an optional approval note to the manager.



The quote may then be previewed to make sure it is correct, by clicking on the **Save & Preview Quote** button.

If the quote is ready to send, the user can request approval by clicking on the **Request Approval** button at the top of the Preview page.

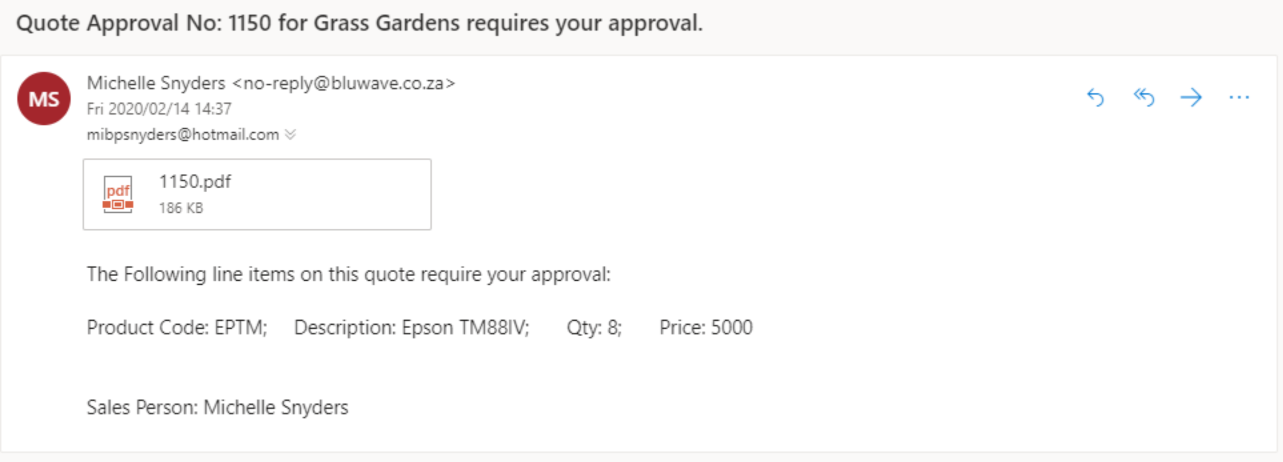


After clicking on the **Request Approval button** an email will be sent to the Approval Manager to let them know there is a quote that needs approval.

Once the Approval Manager has approved the quote, the user will receive an email and they can then return to this page to email the quote to the client.

8.3.1.2 What is required from the Approval Manager

Once the user has requested approval, the Approval Manager will receive an email with the quote requiring approval as an attachment.

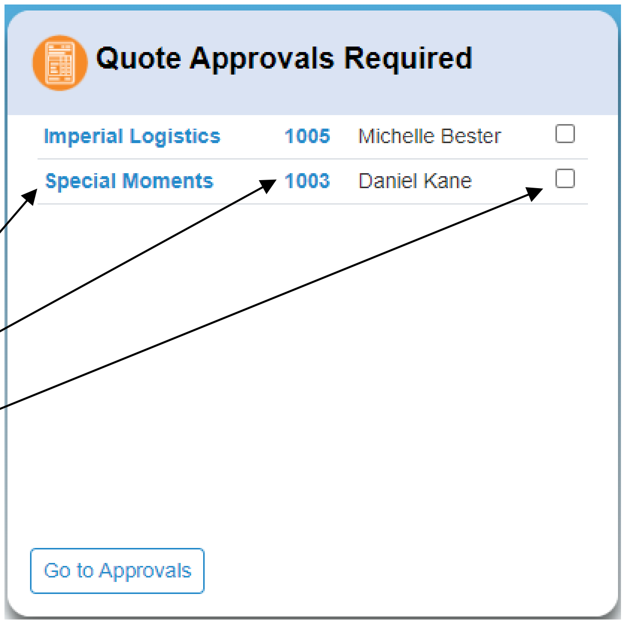


The Approval Manager would need to then log into BluWave CRM to approve the quote.

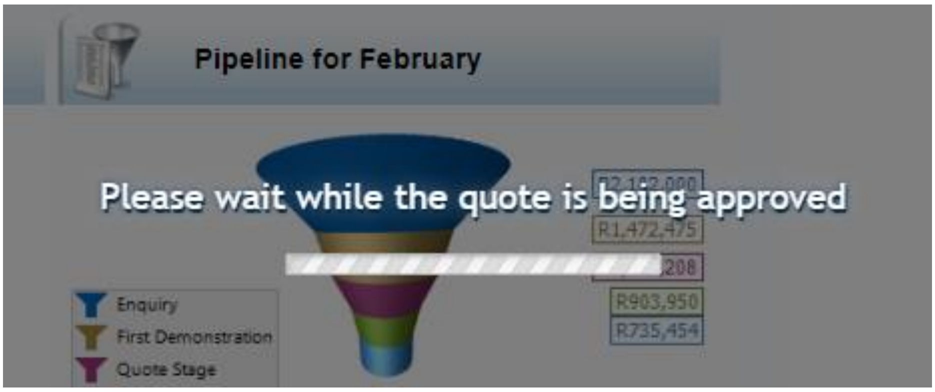
On the Approval Managers' **Home page**, they would be able to see a list of all the quotes requiring their approval.

The Approval Manager would then be able to do the following:

- Click on the **Company** name to go to the **Edit Company** page.
- Click on the **Quote Number** to access/ edit the quote.
- Click on the **Checkbox** to instantly approve the quote.



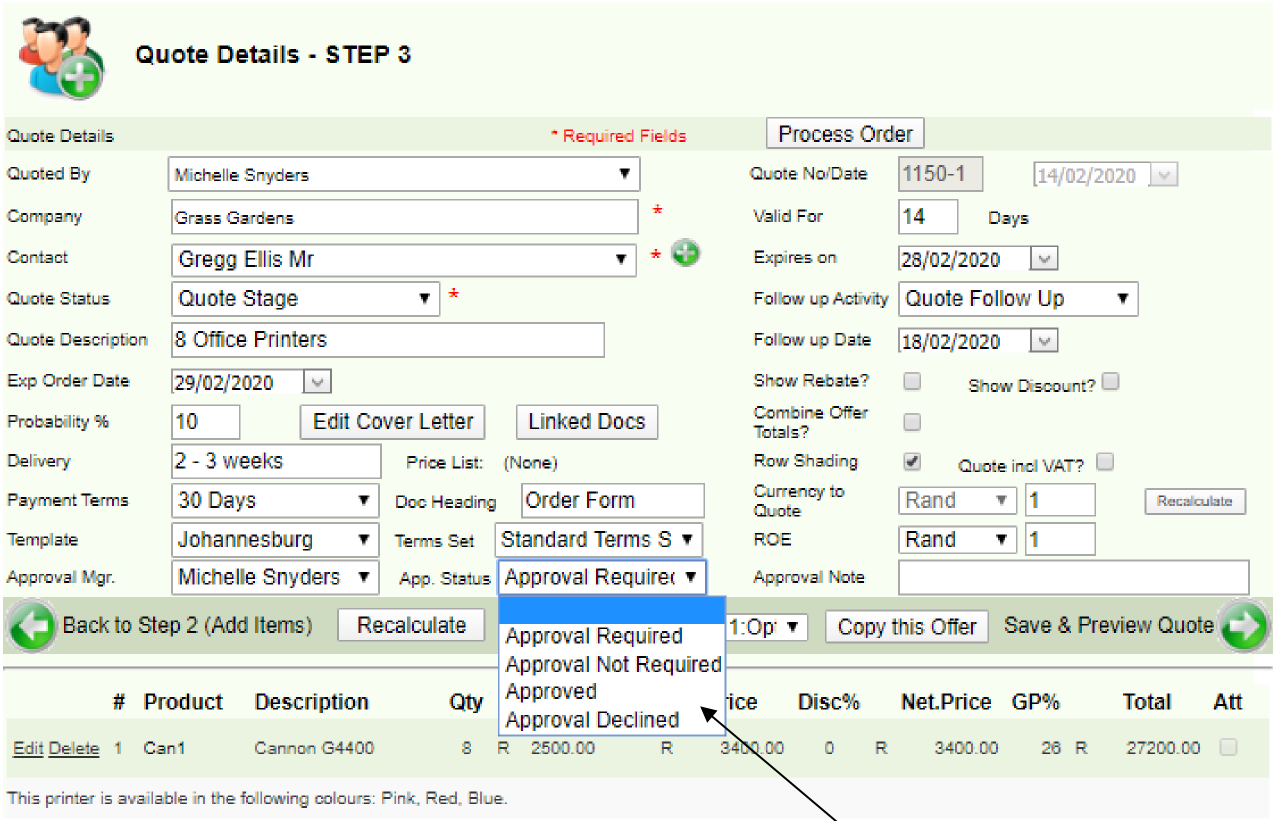
Once the Approval Manager checks the **Approval Checkbox**, an email will be sent to the Sales Staff user to notify them that the quote has been approved / declined.



If the Approval Manager wishes to edit or preview the quote before approving, they can access the quote by clicking on the **Quote Number**.

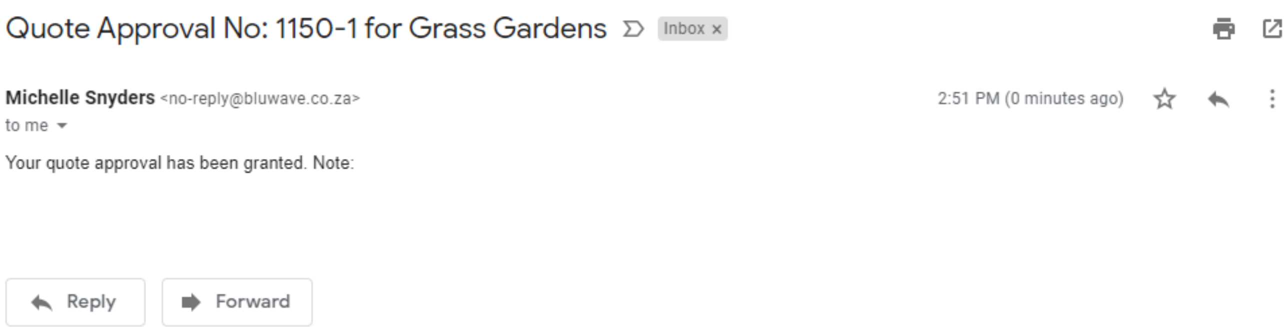
This will direct the Approval Manager to **Step 3** of the quote process.

From here the Approval Manager can make changes as necessary as well as preview the quote.



The Approval Manager would need to change the selection of the **App. Status** field to either ***approved*** or to ***approval declined***.

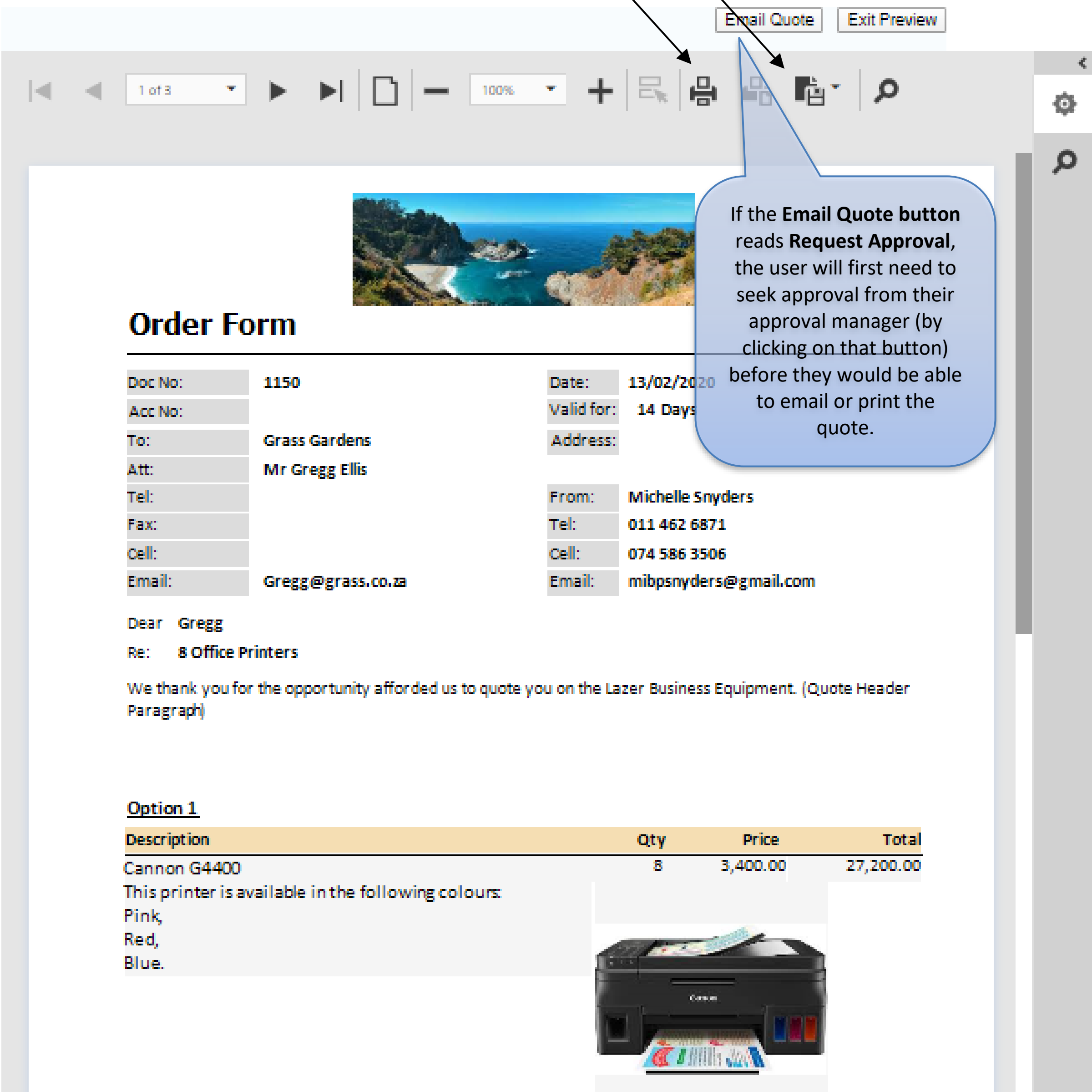
Once the manager has made a selection, an email will be sent to the Sales Staff to notify them of the change in approval status on their quote.
Below is an example of the notification email the sales staff would receive.



8.4 Step 4: Preview the Quote

From the **Preview** page the user can scroll down to view the quote (Please see the appendix A for an example of the quote output)

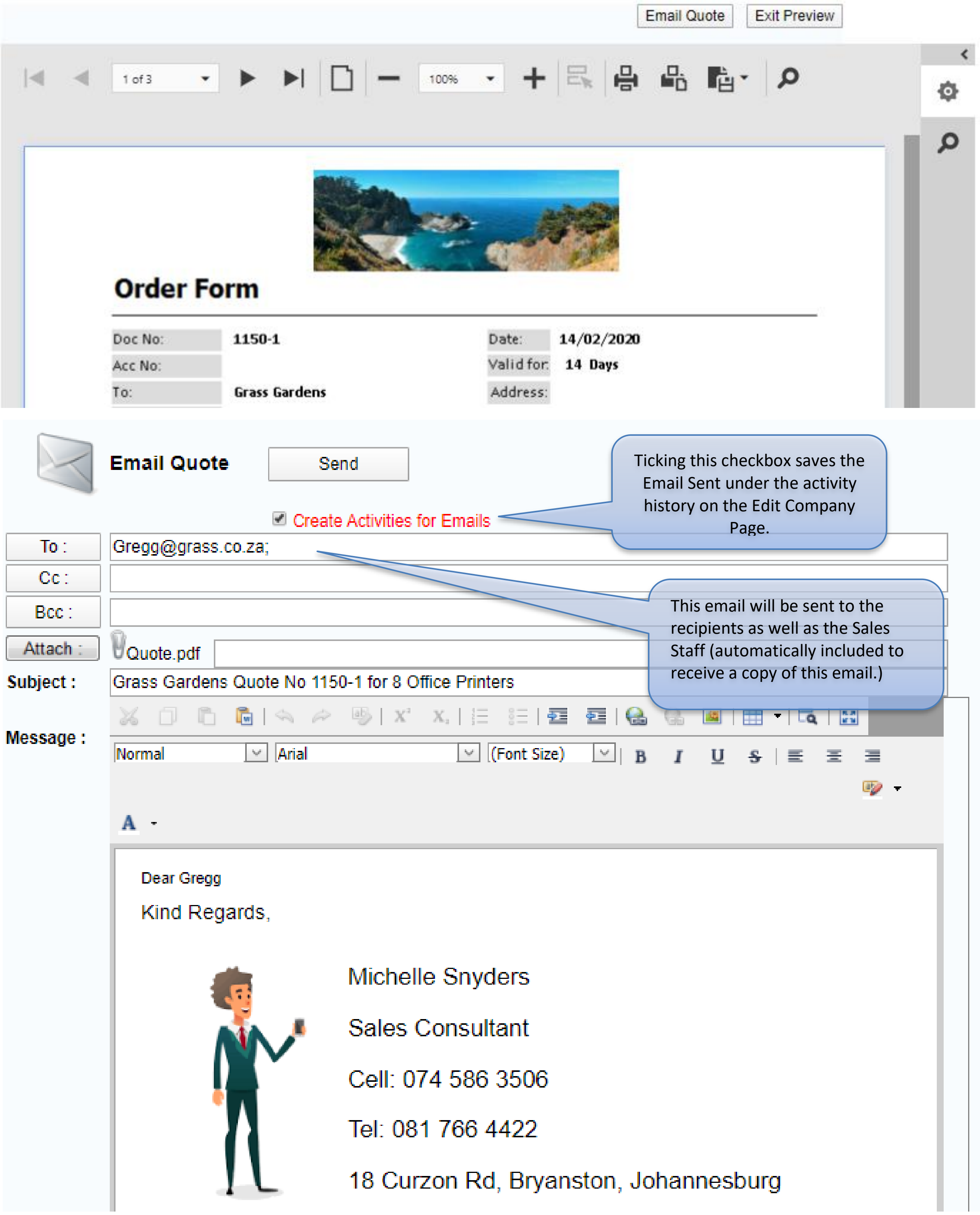
The user can also use the buttons at the top to either **print, export or email** the quote.



Click on the **Exit Preview** button to return to Step 3 of the Quote process.

8.4.1 Email the Quote

To Email a quote to the client, click on the **Email Quote** button at the top of the **Quote Preview** page**.**



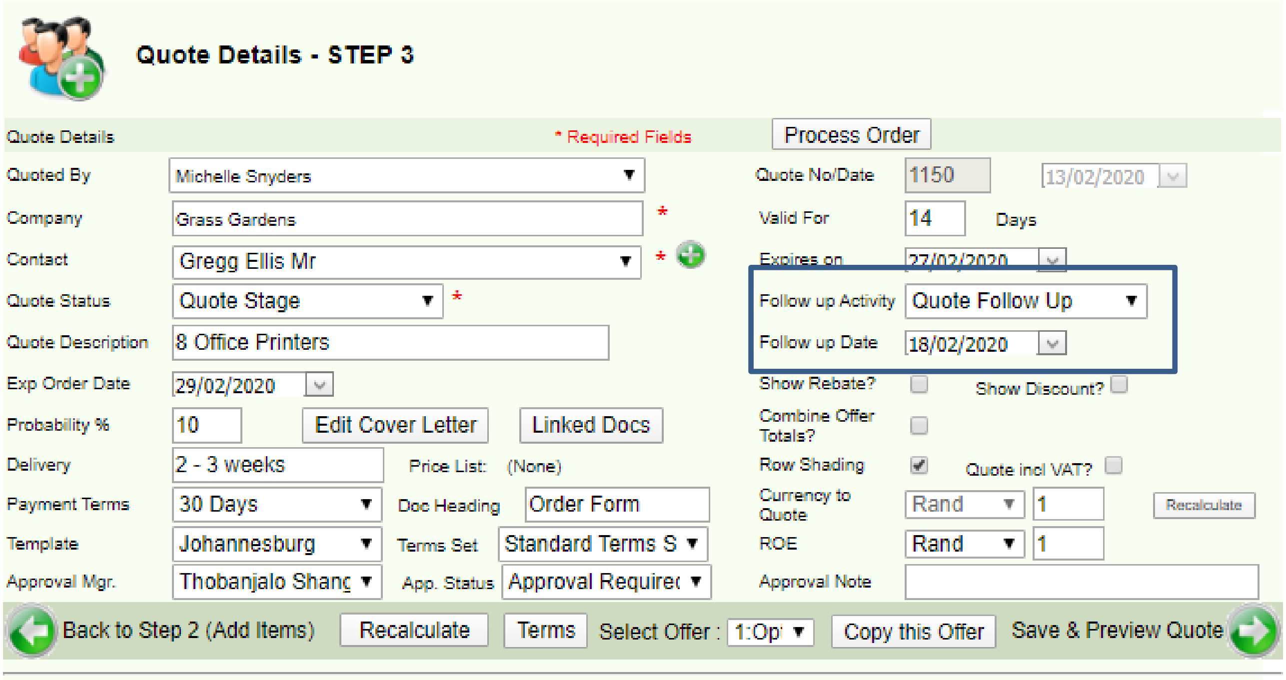
The subject line automatically includes the **Customer Name**, **Quote Number** and the **Quote Description**.

The Body of the email contains the default message defined in the Quote Set up – the user will be able to edit the message before sending.
Their email signature will also be automatically added if it is set up on their user profile.

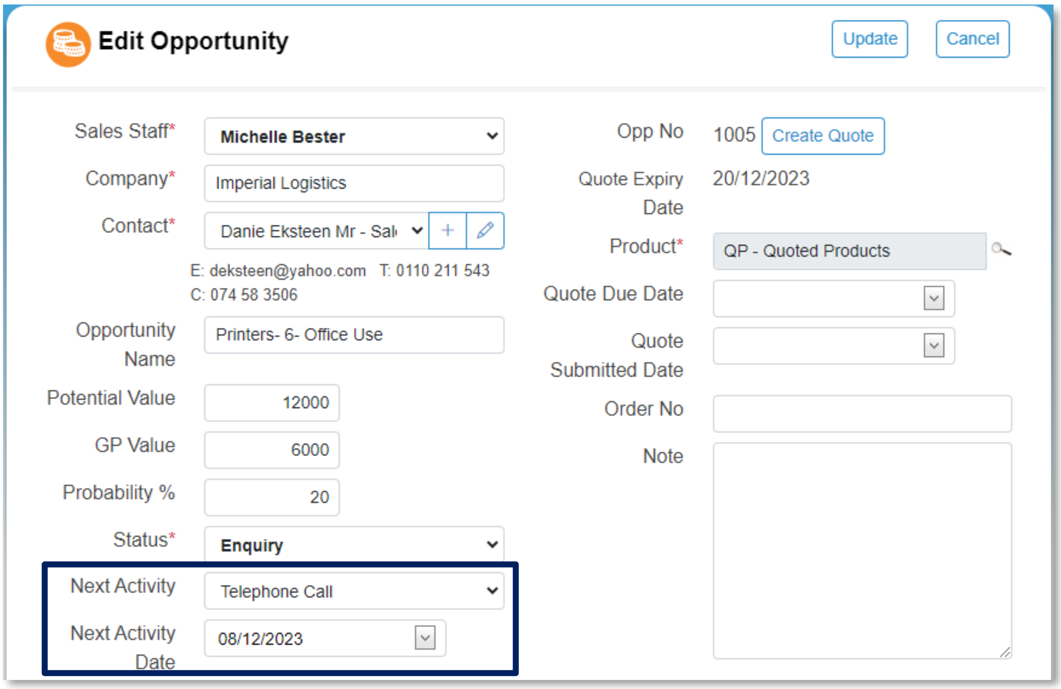
9. Creating a Follow up Activity- Step 3 of the Quote Process

When a quote/ opportunity is created, the user can let the system automatically create a follow-up activity for that quote/ opportunity that will appear in their diary.

A follow up activity can be created from the Add/ Edit Opportunity page or Step 3 of the quote process.



The user would simply need to populate the **Next Activity/ Follow up Activity** with the relevant **Follow Up Date** for the activity. (The system could be set to automatically fill in Quote Follow Up on Step 3; as well as to automatically default the date of the next activity to a specific number of days after the creation of the opportunity/quote.)



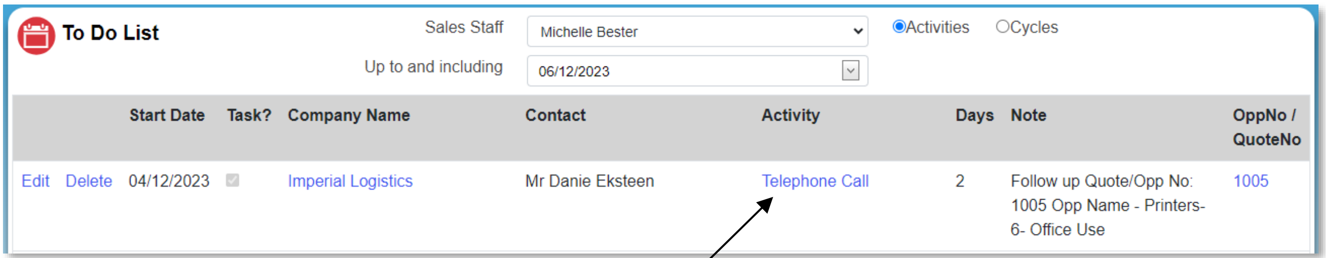
The activities will be created as soon as the user clicks on either the **Save and Preview Quote** button (on Step 3 of the Quote process) or on the **Update** button (on the Opportunities page).

9.1.1 Updating the Opportunity Status from a Follow up Activity (Completing)

Once a follow up activity is created, it will be linked to the opportunity.

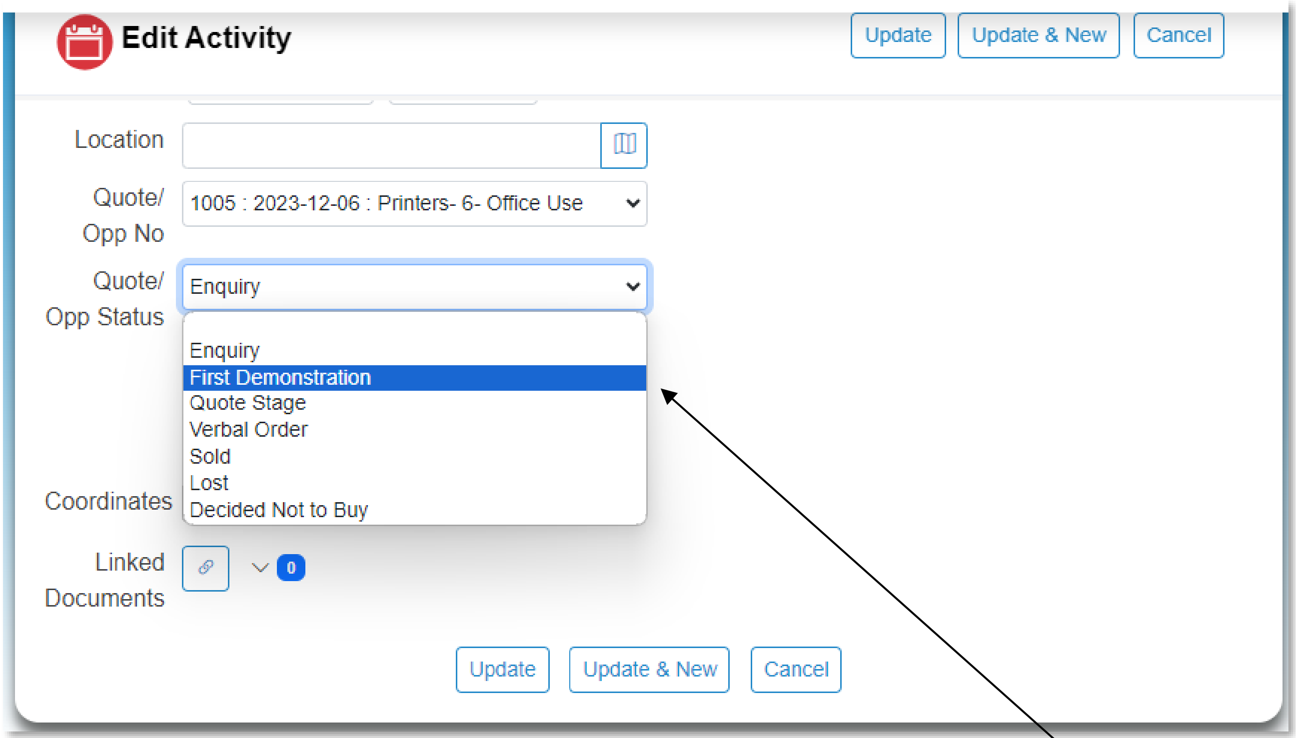
This allows the user to easily update the status of the opportunity, provide the system with the feedback on that activity and complete the follow up activity, all on one page.

A follow up activity can easily be found by looking at the **To Do List** page (from the **Activities** menu).



To Edit and/or Complete this activity, click on the **Activity Description**.

The **Note** of a follow up activity is automatically populated with the details of the related quote/opportunity.



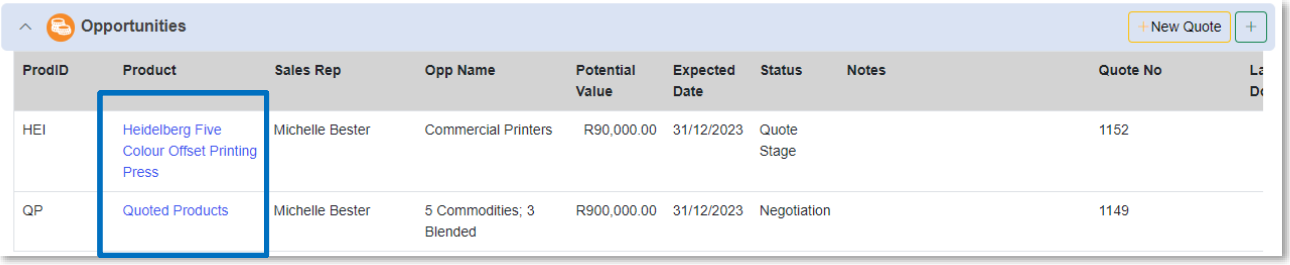
The user would then be able to type in their notes (feedback) on the activity and change the **Quote Status** of the Opportunity/Quote.

10. Edit the Quote

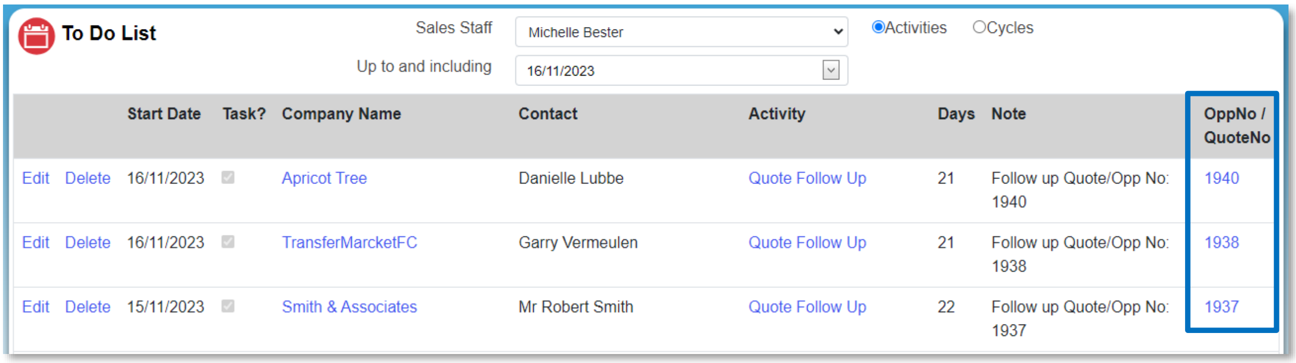
The quote can be edited from the **Opportunities** page, which can be reached from:

- The **Opportunities** panel in on the **Companies** page by clicking on the **Product Description.**
- The **To Do List** page- clicking on the **Quote/ Opportunity Number.**
- The **Opportunities** tab- clicking on the **Edit** link next to the Opportunity.

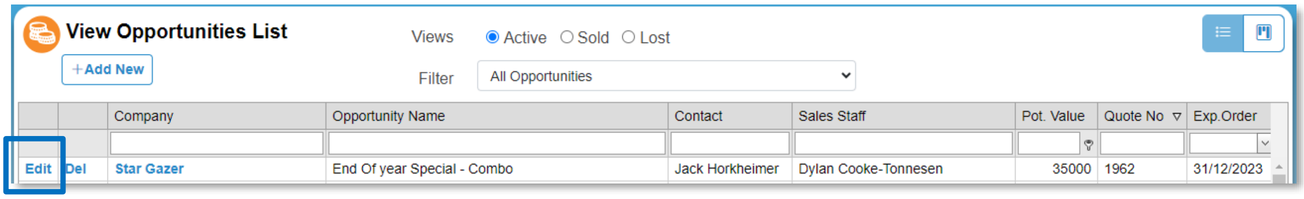
The **Companies** page



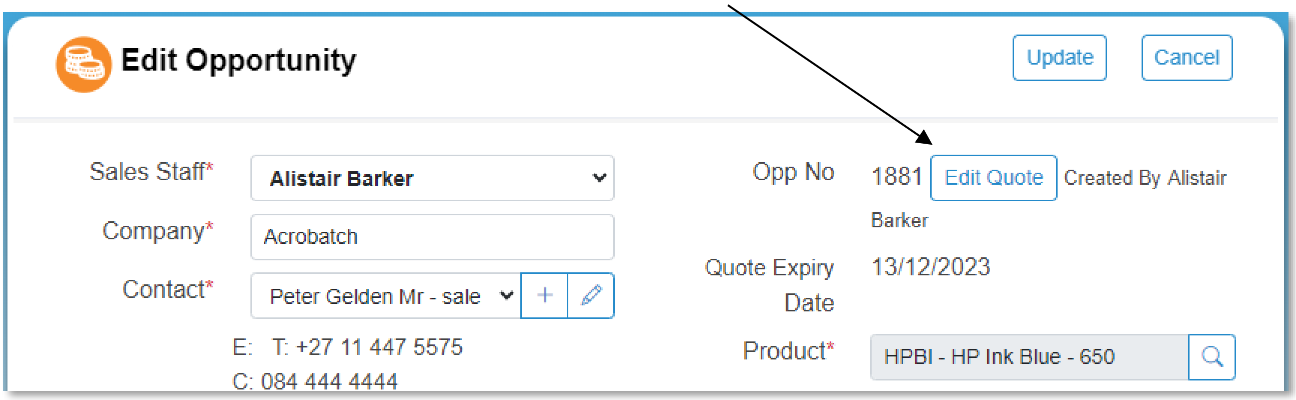
The **To Do List** page



The **View Opportunities** page

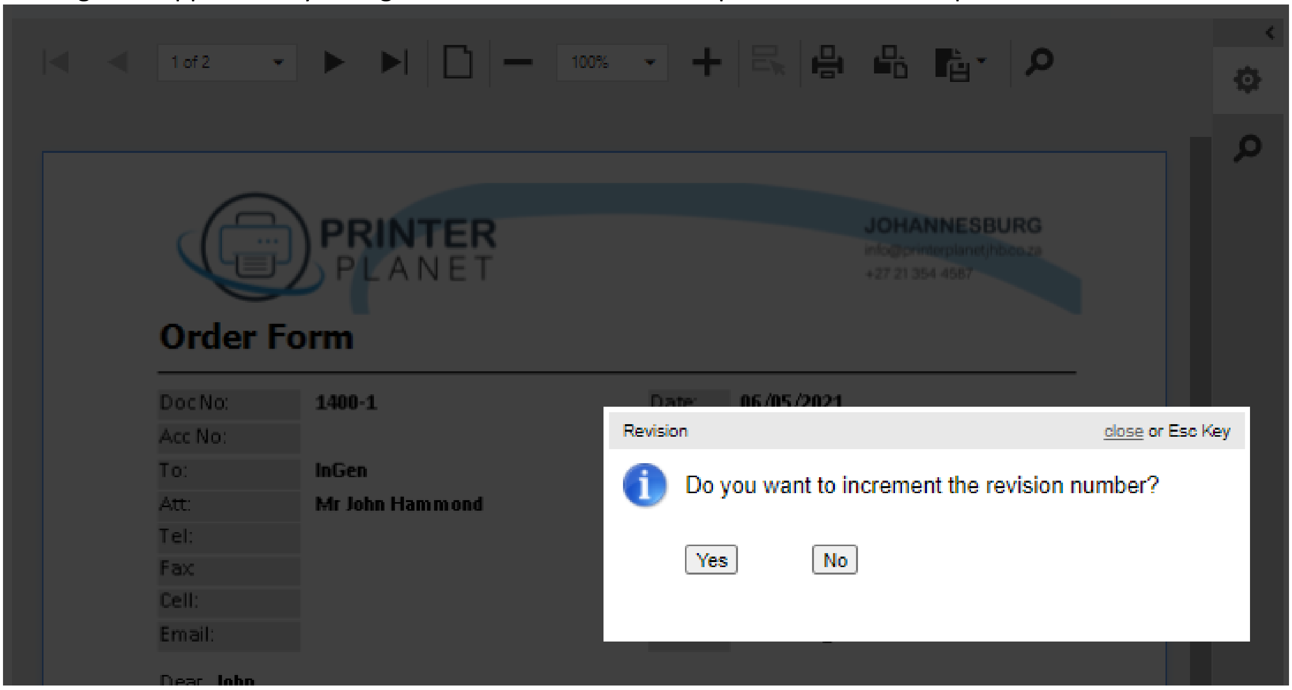


From the **Opportunities** page, the user can click on the **Edit Quote** link to edit the quote.



10.1 Quote Revision Increment

When a user clicks on the **Save and Preview** button on **step 3** of the quoting process, the following message will appear if any changes have been made to the quote since the first preview:



This increments the quote with a dash and a revision number at end of the quote number.

This allows the user to keep track of the various revisions to the quote.

11. Additional Features/ Functions on the Quote Automation Process

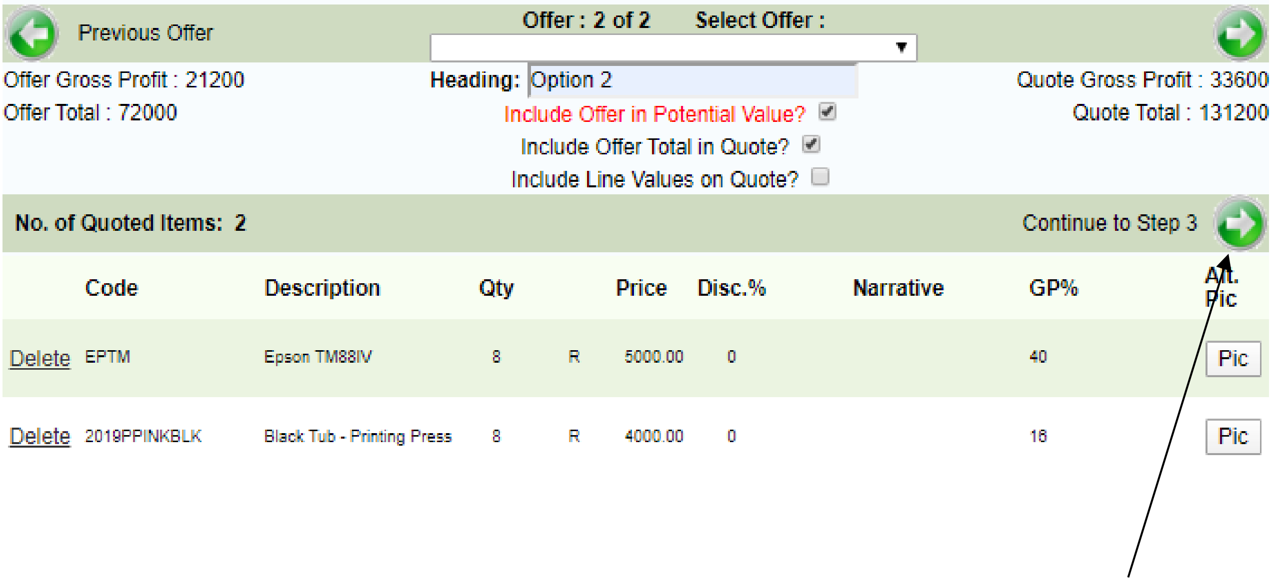
11.1 Adding Additional Offers- Step 2 of the Quote Process

Multiple offers can be added on the same quote.

Clicking on the **Next Offer** button on step 2 of the quote process allows the user to create a new offer on the same quote.

This can be used to supply the client with different options to choose from, or alternatively to show the difference between certain products such as hardware and installation.

Repeat the previous steps to add line items to the second offer and this will also show on the final quote under a different heading.



Once all the intended products have been added onto the different offers (and changes made to the heading and 3 checkbox settings on each offer), click on the **Continue to Step 3** button to finalize the quote.

11.2 Inserting a Pic on the Quote line- Step 2 of the Quote Process

Users can insert a picture into the quote from the quote line and in addition add the picture to the pricelist (if there is not one yet).

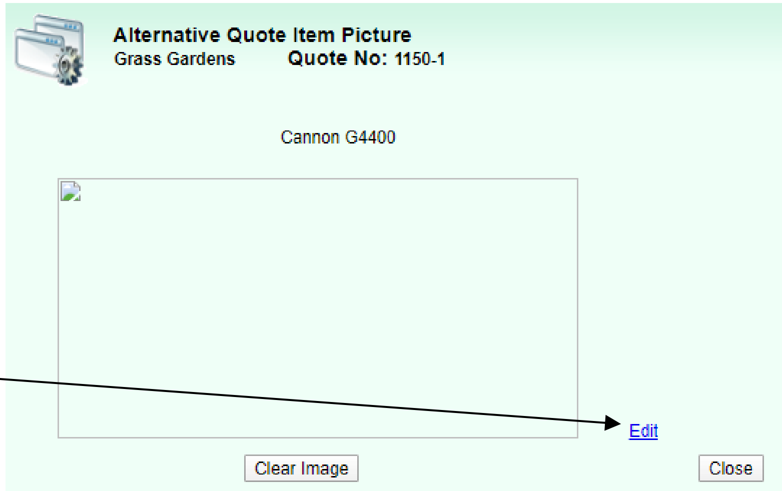
If there is no picture saved in the pricelist, the user would be able to add it to the pricelist (if they have system setup rights), or otherwise they would be able to insert a picture (or replace the existing picture already saved in the pricelist) on that specific line item for that specific quote only.

Step 1: After inserting the quote items- click on the button **Pic.**

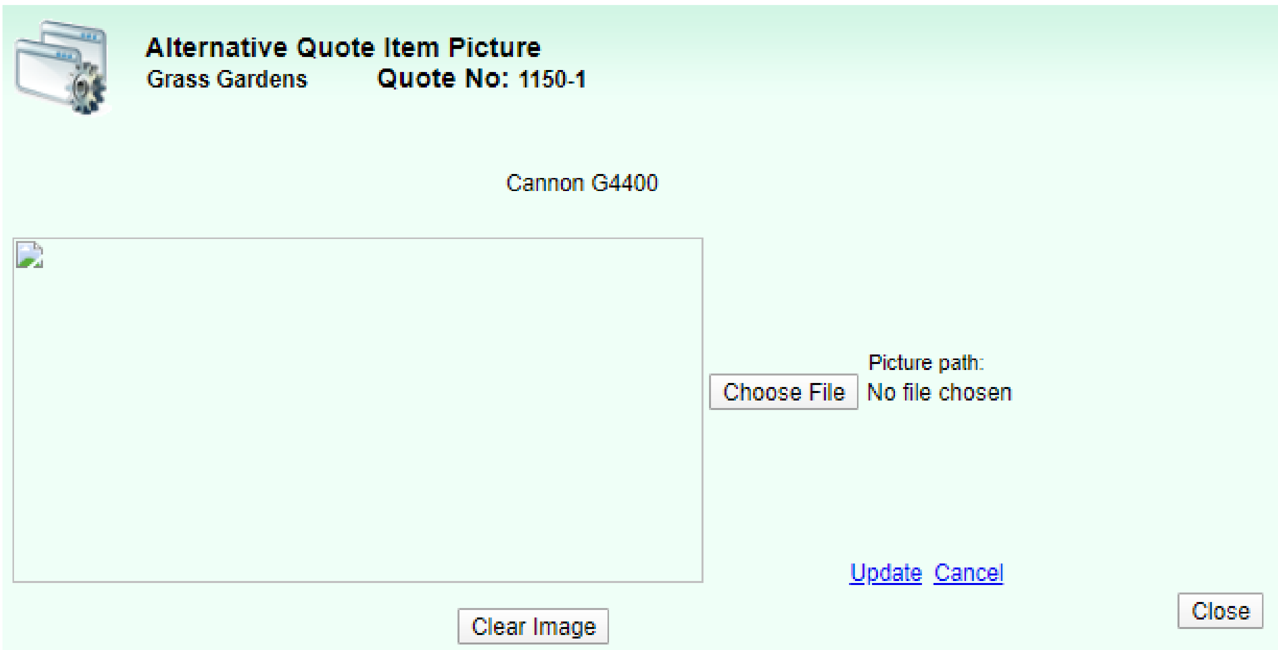
No. of Quoted Items: 2 — Continue to Step 3

	Code	Description	Qty		Price	Disc.%	Narrative	GP%	Alt. Pic
Delete	Can1	Cannon G4400	8	R	3400.00	0	This printer is available in the following colours: Pink, Red, Blue.	28	Pic
Delete	2019PPINKBLK	Black Tub - Printing Press	8	R	4000.00	0		16	Pic

Step 2: The add image screen allows the user to either view, clear or edit/add a new image.
Click on the **Edit** link to replace the image.

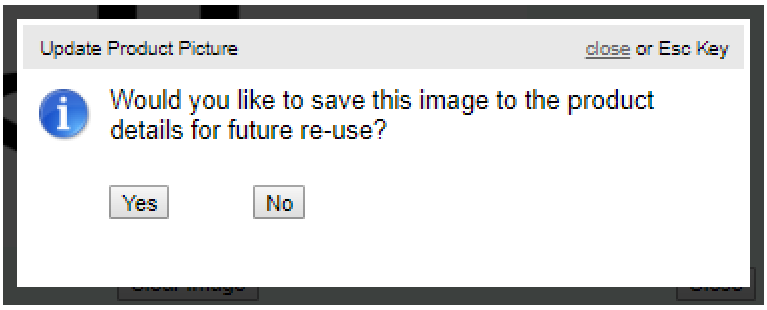


Step 3: The system will then allow the user to then select an image from where it is saved on a computer. To do this click on **Choose File.**



Once an image is chosen the picture path will be displayed next to the **Choose File** button.

Step 4: Click on the **Update** button. If the user has system setup rights and there is no previous picture added to the pricelist, the user will see the next dialogue box. Clicking on **Yes** will save the picture towards the line item for future use.



Once the user has chosen **Yes** or **No**, they are able to either clear the image, edit the image, or close this screen to return to the quote steps.

Image specifications:

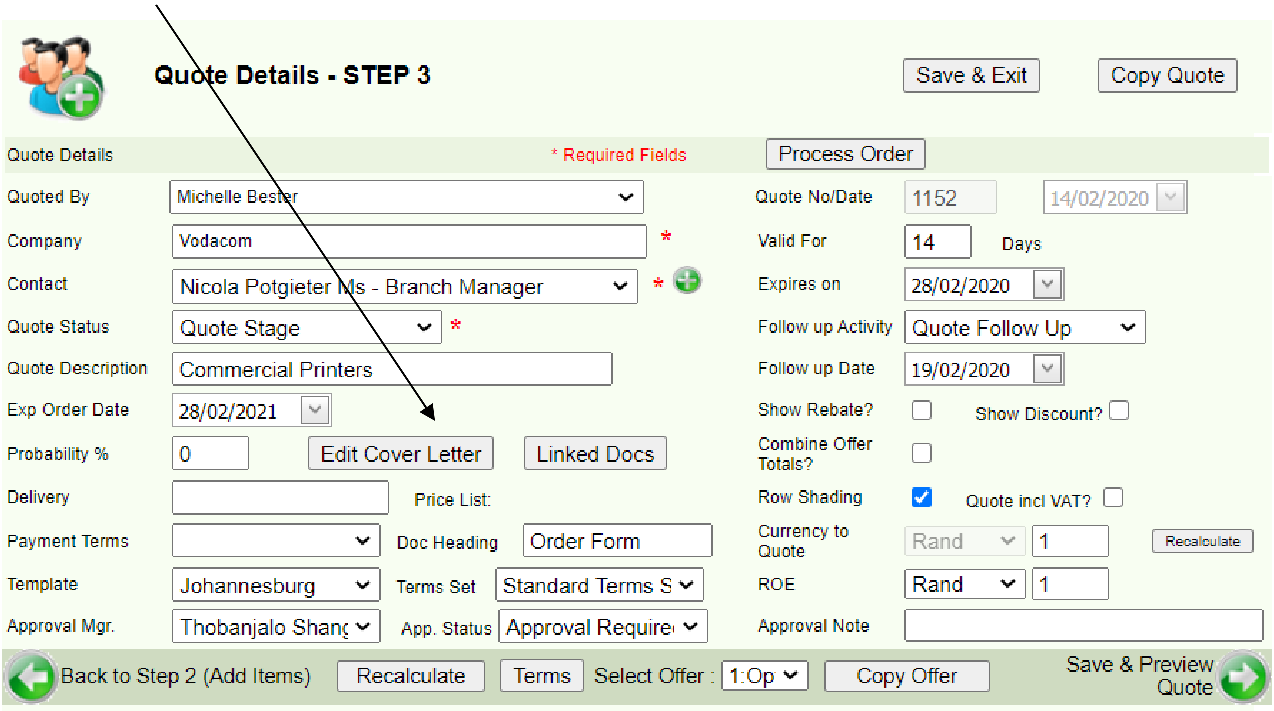
- Maximum Size 100kb
- Accepted Formats .jpeg/ .jpg/ .png
- Aspect Ratio width of 200 pixels

(the image would be set to keep the aspect ratio and be proportionally resized; the system will keep the width at 200px)

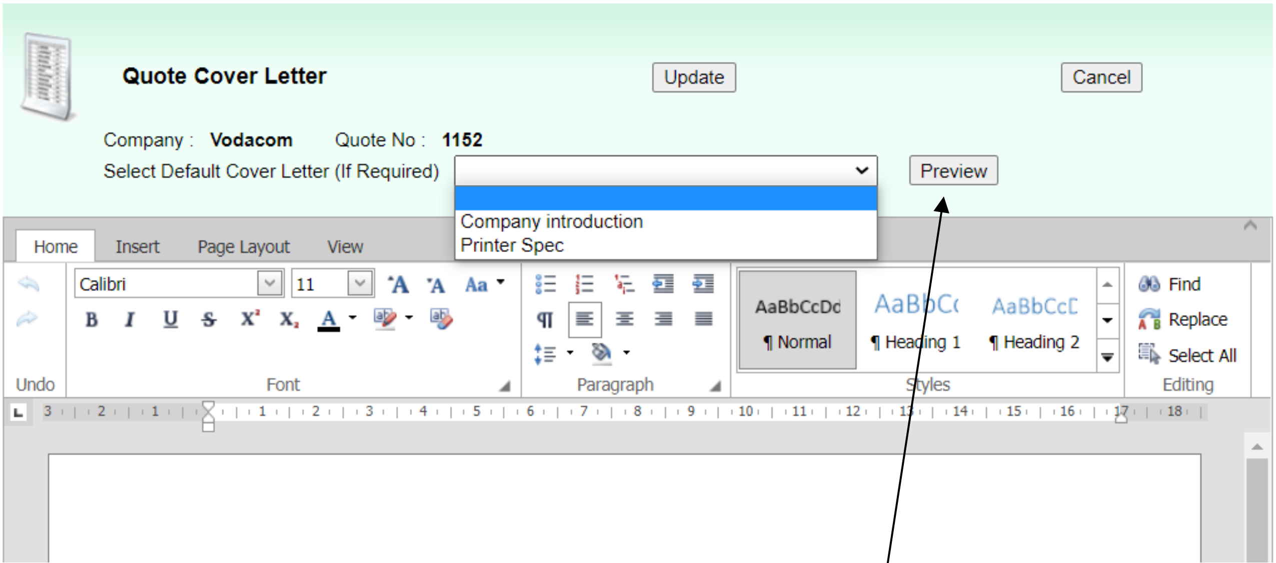
Click on the **Close** button to return to Step 2 of the quote process.

11.3 Adding a Quote Cover Letter- Step 3 of the Quote Process

On Step 3 of the quote, the user can add a **Quote Cover Letter** to the quote by clicking on the **Edit Cover Letter** button.



On the **Quote Cover Letter** page, the user can either select an existing cover letter template (if added to the system setup), or type and create a new cover letter to add to the quote using the editor. If a pre-existing template is selected, the user will be able to make changes to the template that will only be applied to the current quote.

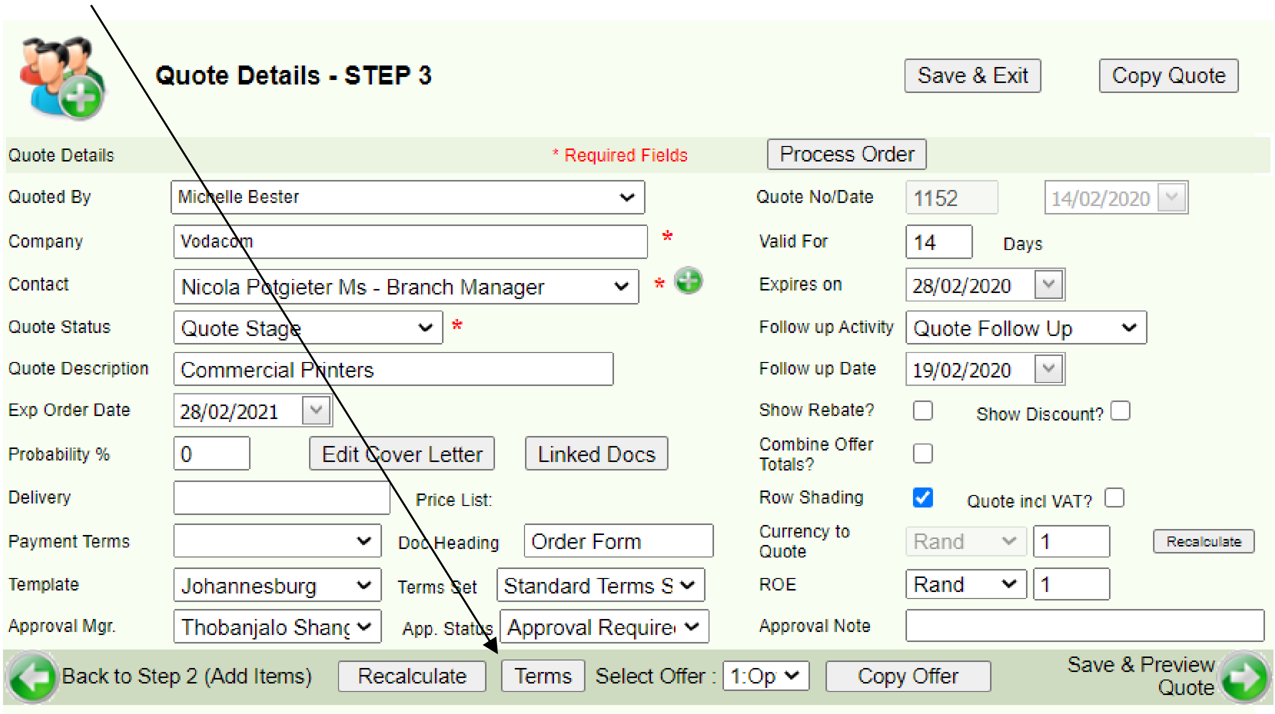


After adding the cover letter to the quote, the user can click on the **Preview** button to see how the cover letter will display on the quote and adjust as necessary.

Clicking on the **Update** button will save the changes and return the user to **Step 3** of the quote process.

11.4 Adding Optional Terms to the Quote- Step 3 of the Quote Process

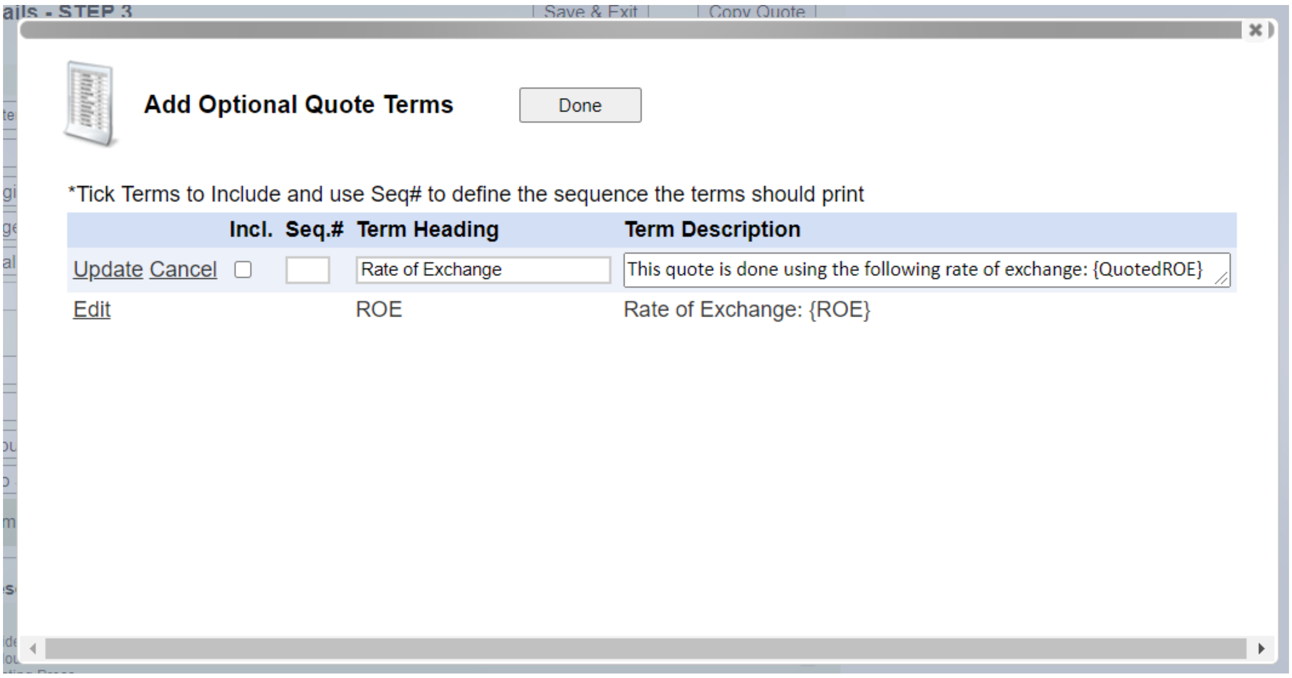
On Step 3 of the quote, the user can add **Optional Terms** to the quote by clicking on the **Terms** button.



Clicking on the **Terms** button will pop up the **Add Optional Quote Terms** form.

On this form, the user will click on the **Edit** link to include the term on the quote (checking the checkbox) and/or edit:

- The **Sequence** in which the terms should be displayed.
- The **Heading** and **Description** of the optional term.

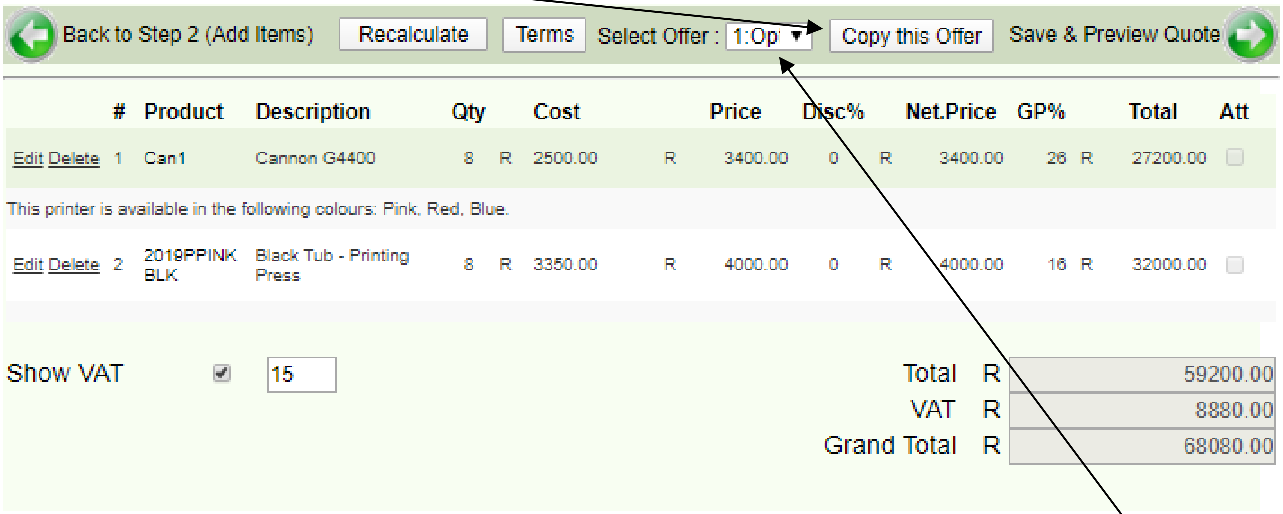


After editing the Optional Term and making the appropriate changes, the user must click on the **Update** link to the left of the line to save the changes, and then click on the **Done** button to insert the term on the quote and close the form.

11.5 Copy Offer Function- Step 3 of the Quote Process

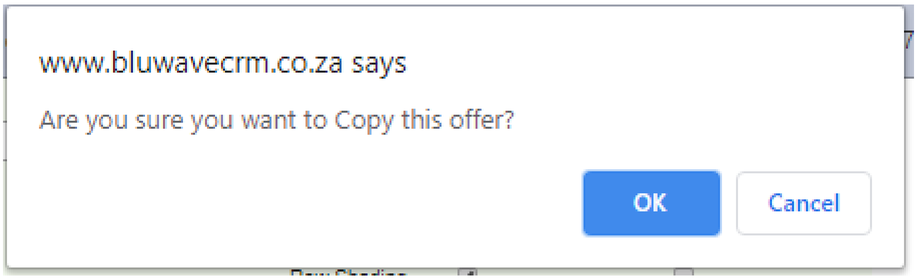
Users can duplicate offers on the quote. This allows the user to quickly make minor changes to an alternative option that the client could choose from.

Click on the **Copy this Offer** button on Step 3 of the Quote process.

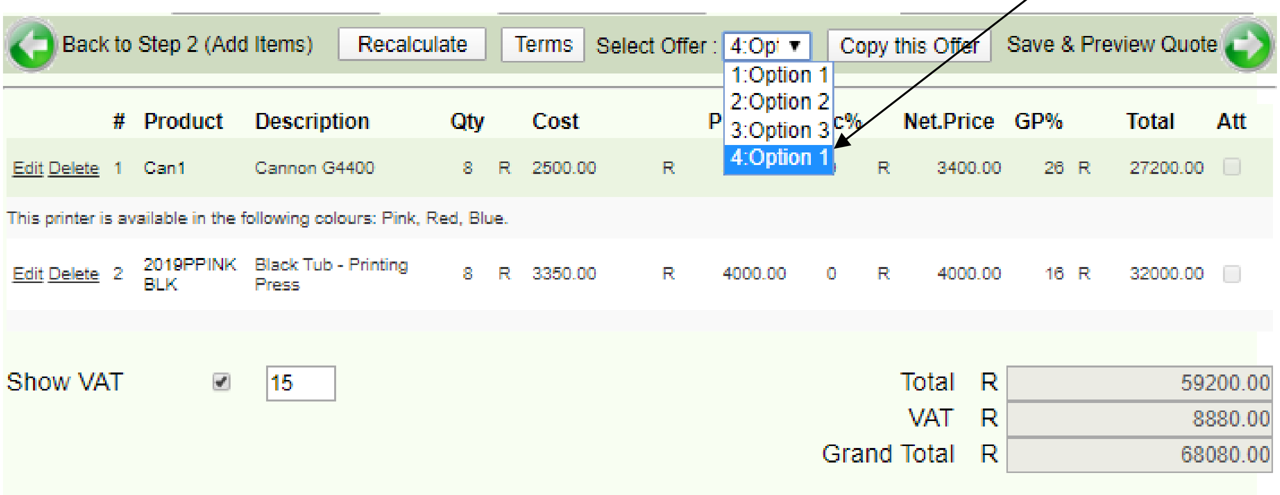


Please note that the current offer the user is viewing will be duplicated. (In this example it is offer 1).

A confirmation message will be shown, select OK to continue with the duplication.

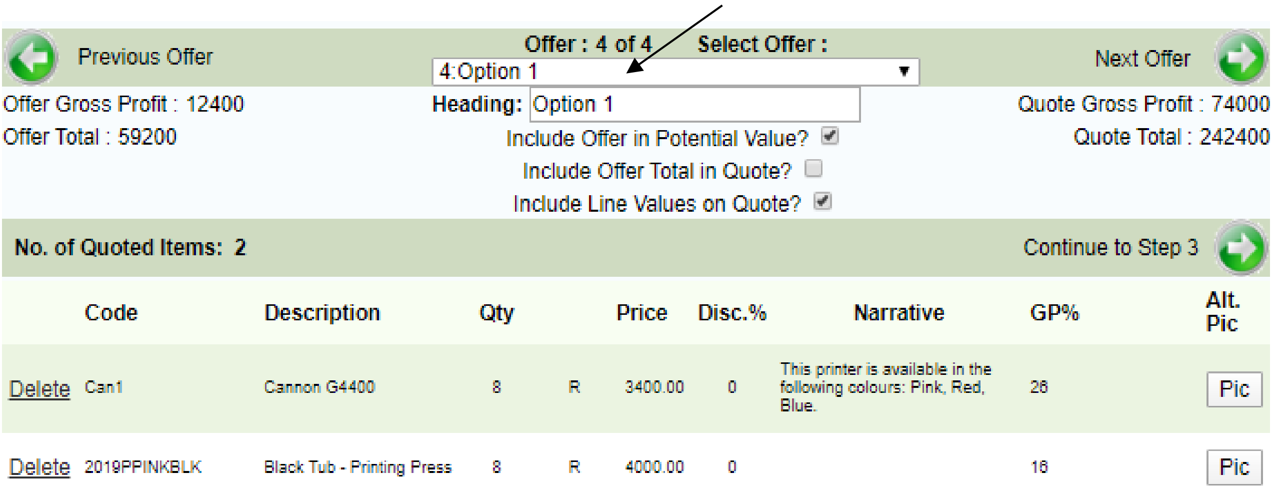


The user will then be directed to the newly created offer. As can be seen below it is now offer 4 but has the same heading as the offer it was duplicated from.



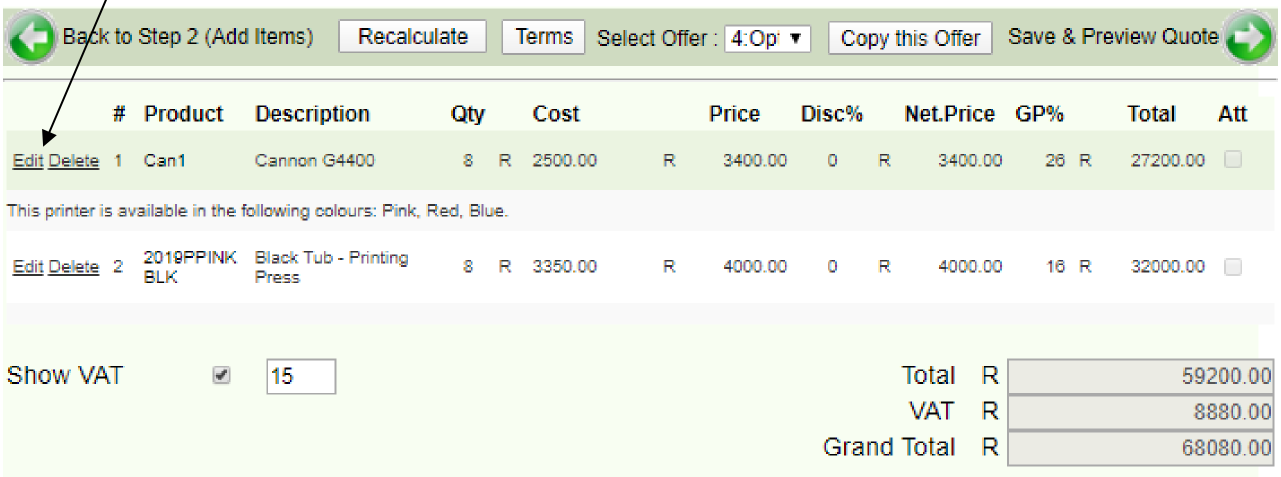
The user may click on the **Back to Step 2** button to make any changes to the products included in the offer and to rename the offer.

The user may choose the correct offer to view from the offer dropdown list.



The user will then be able to make changes to the products and rename the offer appropriately, in this example the offer could be renamed “Option 4”.

Click on the **Continue to Step 3** button to continue with the quote process. On **Step 3** of the quote process the user can make changes to the quantities, narratives, and pricing of the products by clicking on the **Edit** link next to the products.

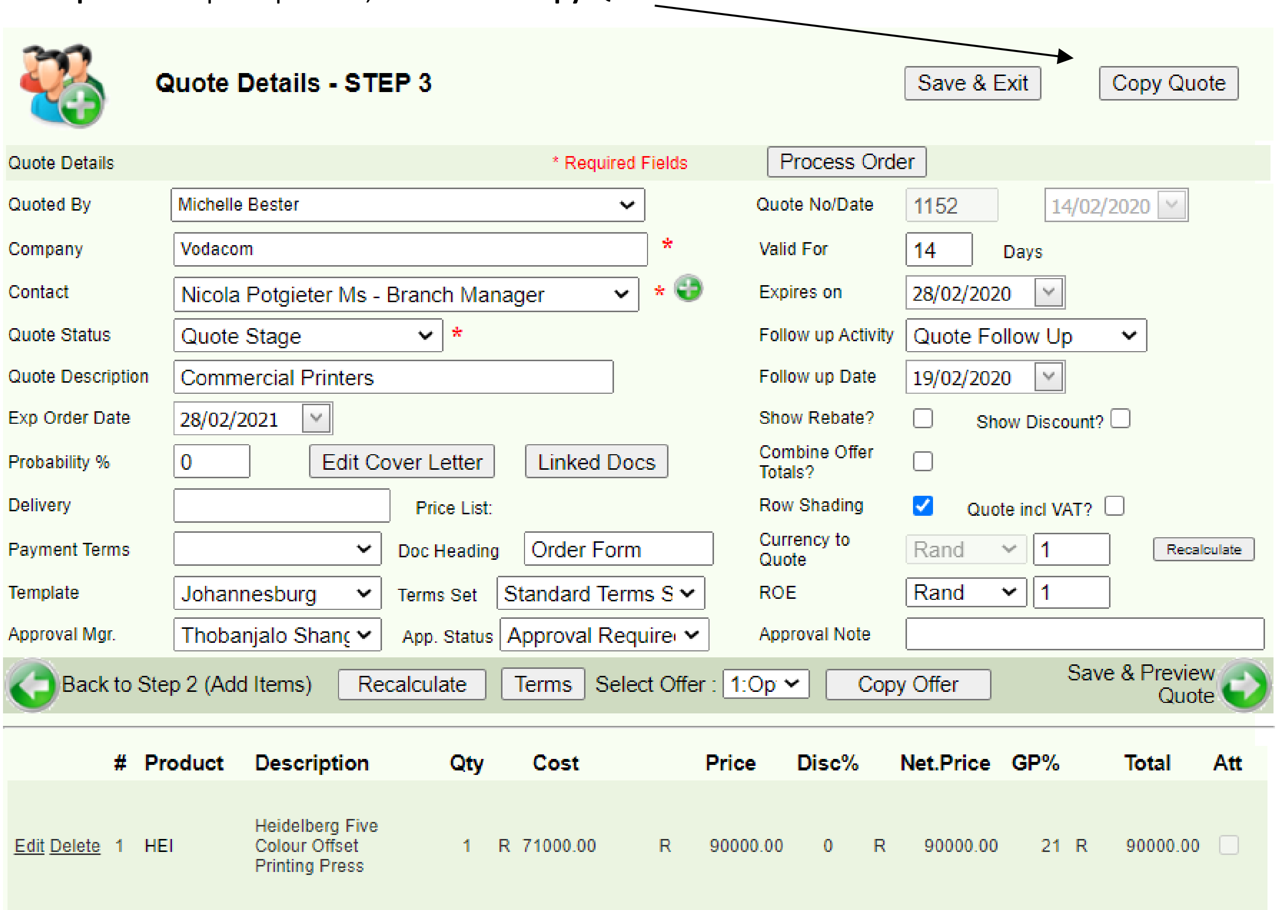


11.6 Copy Quote Function- Step 3 of the Quote Process

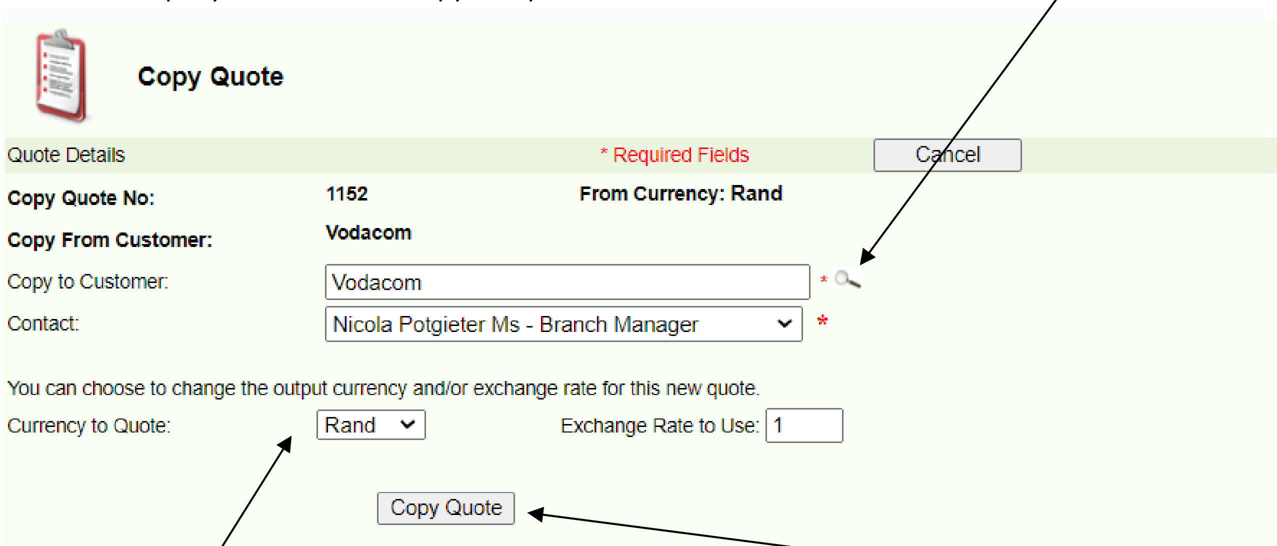
Users can copy a quote from one company to either the same or another company, and then decide to keep the currency and exchange rate the same or change it before copying.

This can save a user time when a customer asks for the same quote in another currency, customers have recurring similar orders or if different customers ask for similar quotes.

On **Step 3** of the quote process, click on the **Copy Quote** button.

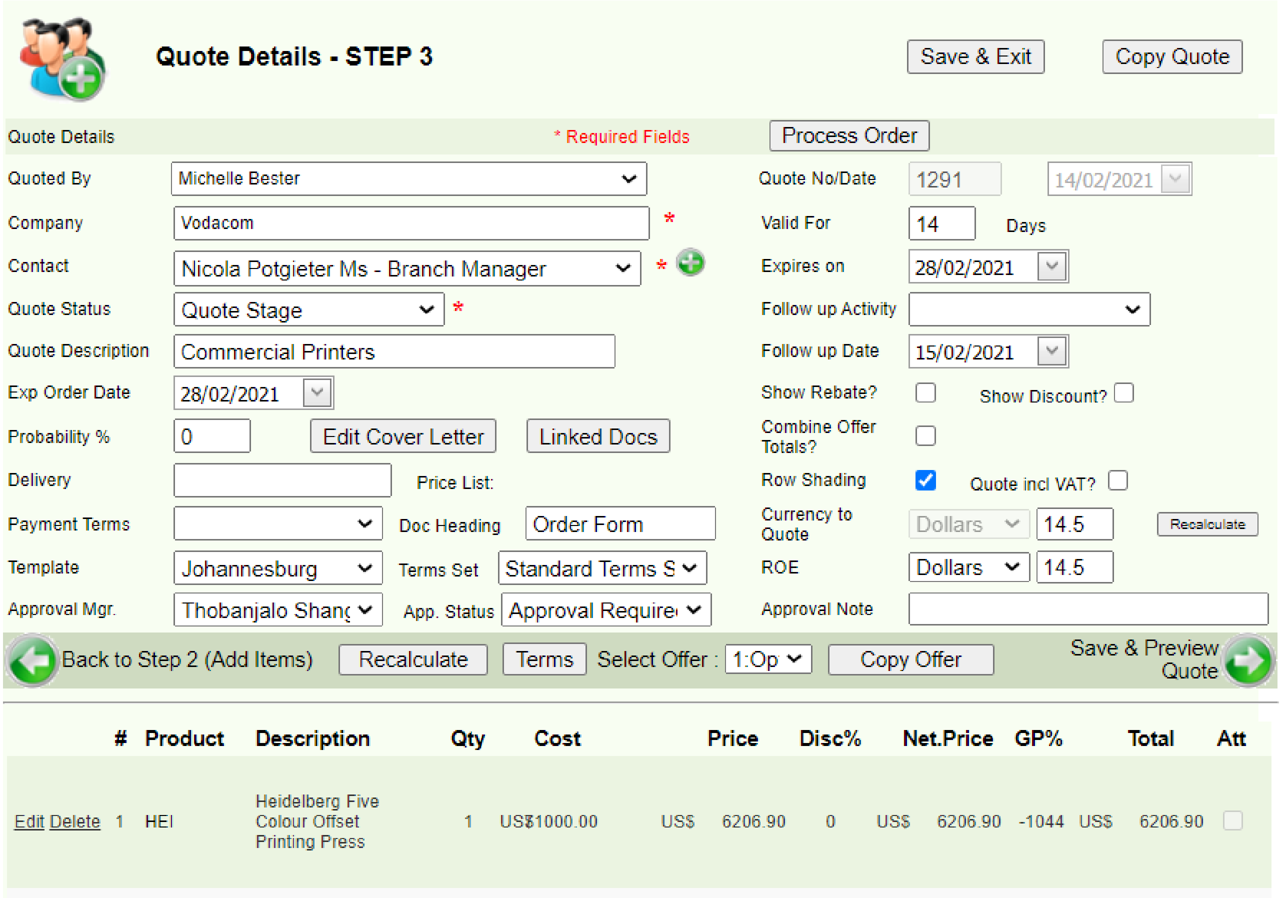


On the next page, the user can either keep the **Company Name** as is or use the magnifying glass to select a different company and contact to copy the quote to.



The **Currency to Quote** and **Exchange Rate** can also be changed, before clicking on the **Copy Quote** button.

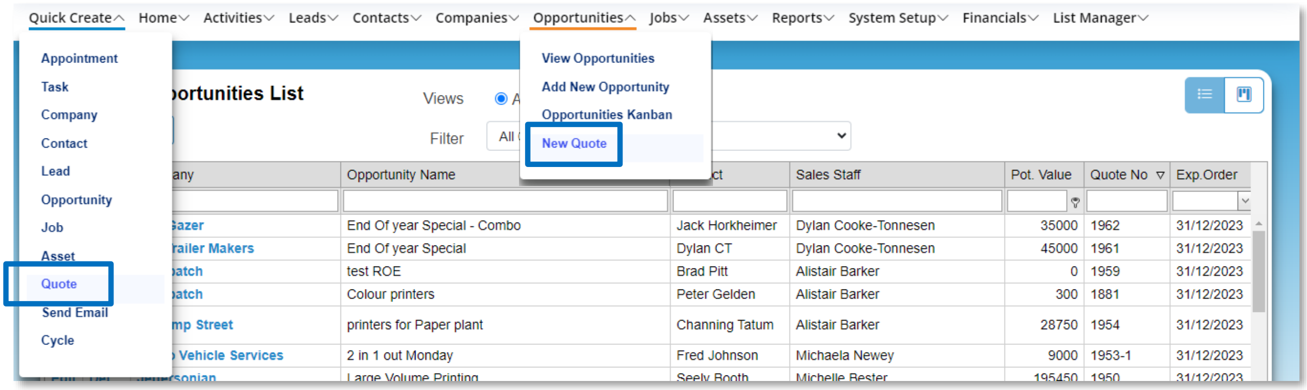
After clicking on the **Copy Quote** button, the user will instantly be directed to **Step 3** of the NEW quote copied. The user will see the Quote Number has changed and can continue to edit the quote as required.



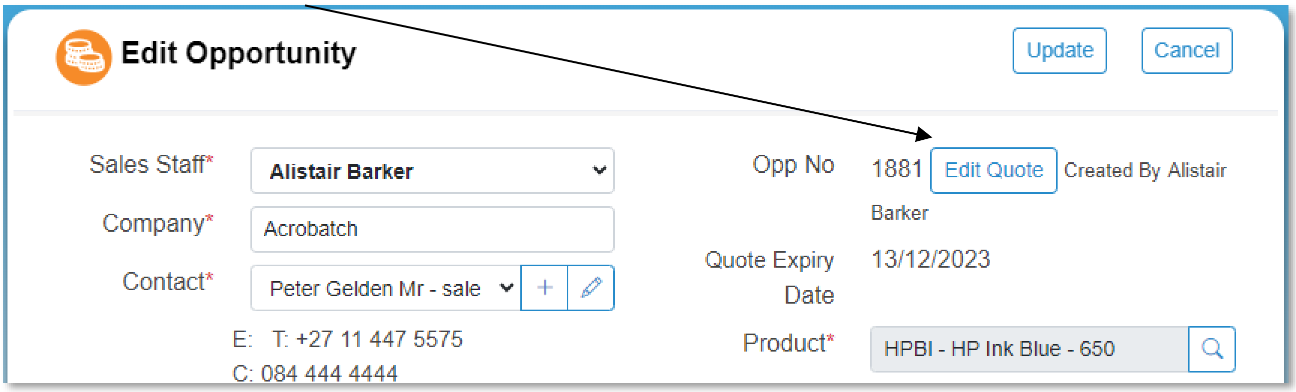
After editing the NEW quote, the user can either click on the **Save & Preview Quote** or the **Save & Exit** button.

11.7 Auto Creation of the Opportunity

When a quote is generated without raising an opportunity first, the system will automatically create an opportunity with a link to the quote.



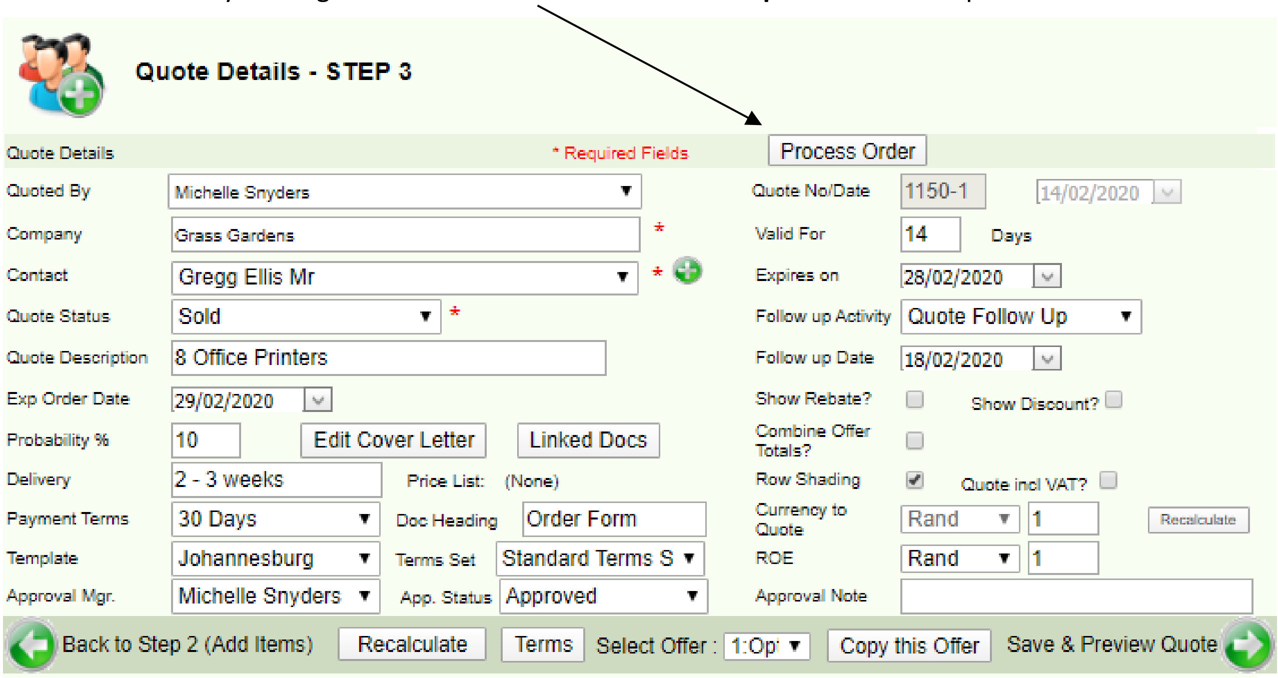
Clicking on the **Edit Quote** button will open the quote to edit or preview as required.

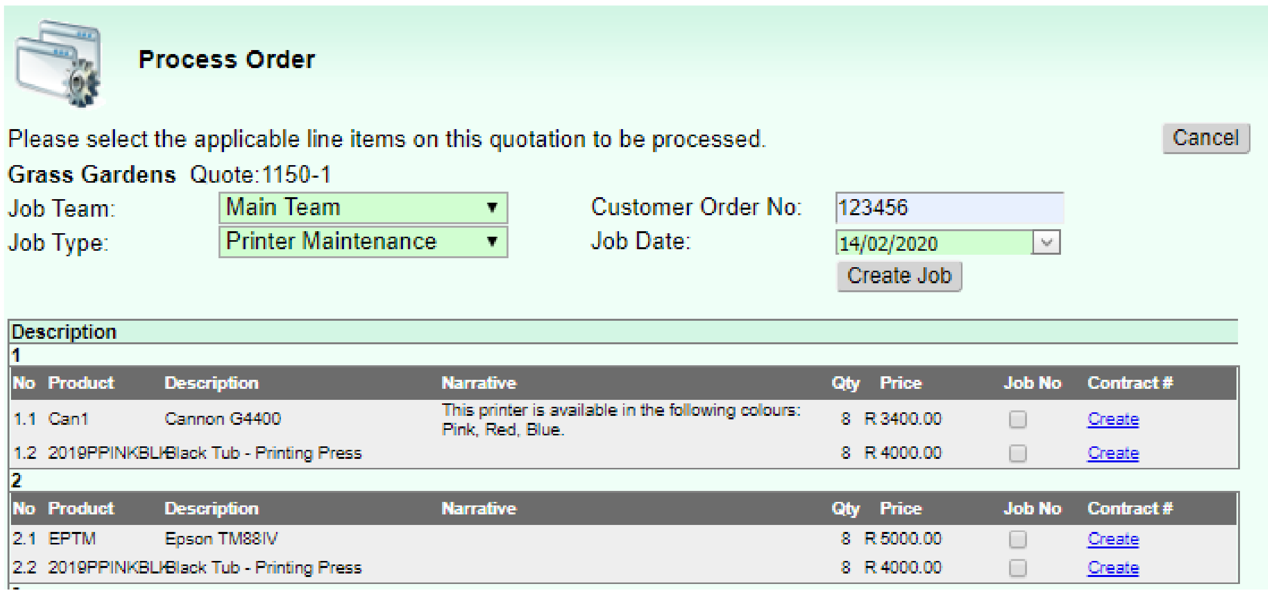


11.8 Process Order Function- Step 3 of the Quote Process

Once the client has accepted the quote, the user may create **Current Products (Contracts)** as well as **a Job** from the Quote Line Items.

This can be done by clicking on the **Process Order** button on **Step 3** of the Quote process.





To Create a Current Product (also known as an Asset or Contract) – click on the **Create link** on the right-hand side of the product. (The user will be directed to the Current Product page with the relevant details populated)

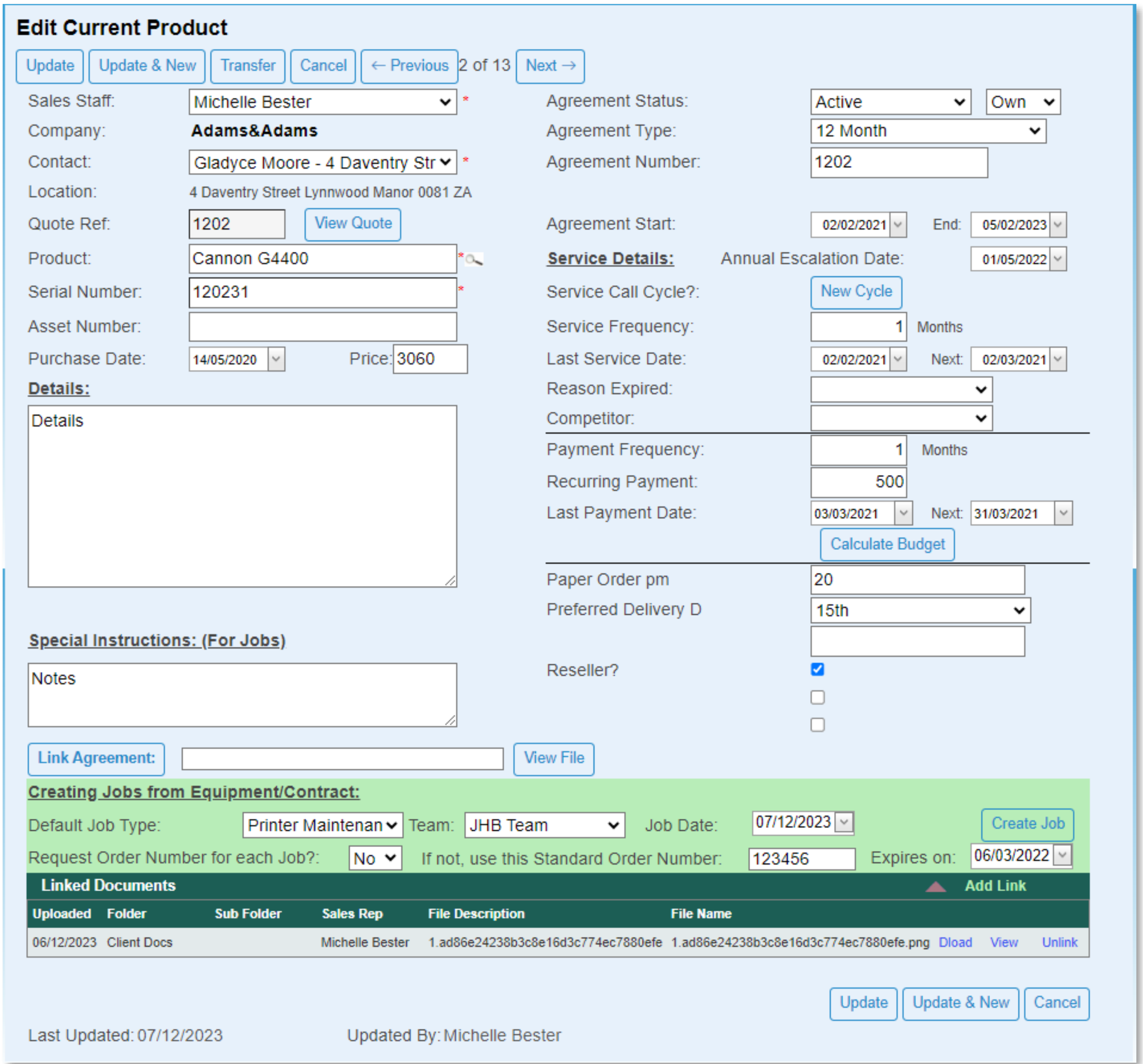
To Create a Job Card tick all the line items that were purchased (or require installation) and then click on the **Create Job** button.

For the job card, the following fields at the top of the page would also need to be populated:

- **Job Team**: the team the job card should be allocated to.
- **Job type**: the type of Job the Job Card should be created as.
- **Customer Order No**: the Order number provided by the customer (could be a standard order number).
- **Job Date**: the date the Job should be created for.

11.8.1 Current Product Created

Once a Current Product is created, the user will be directed to the page below. The user can enter the outstanding information on this page before clicking on the **Update** button.

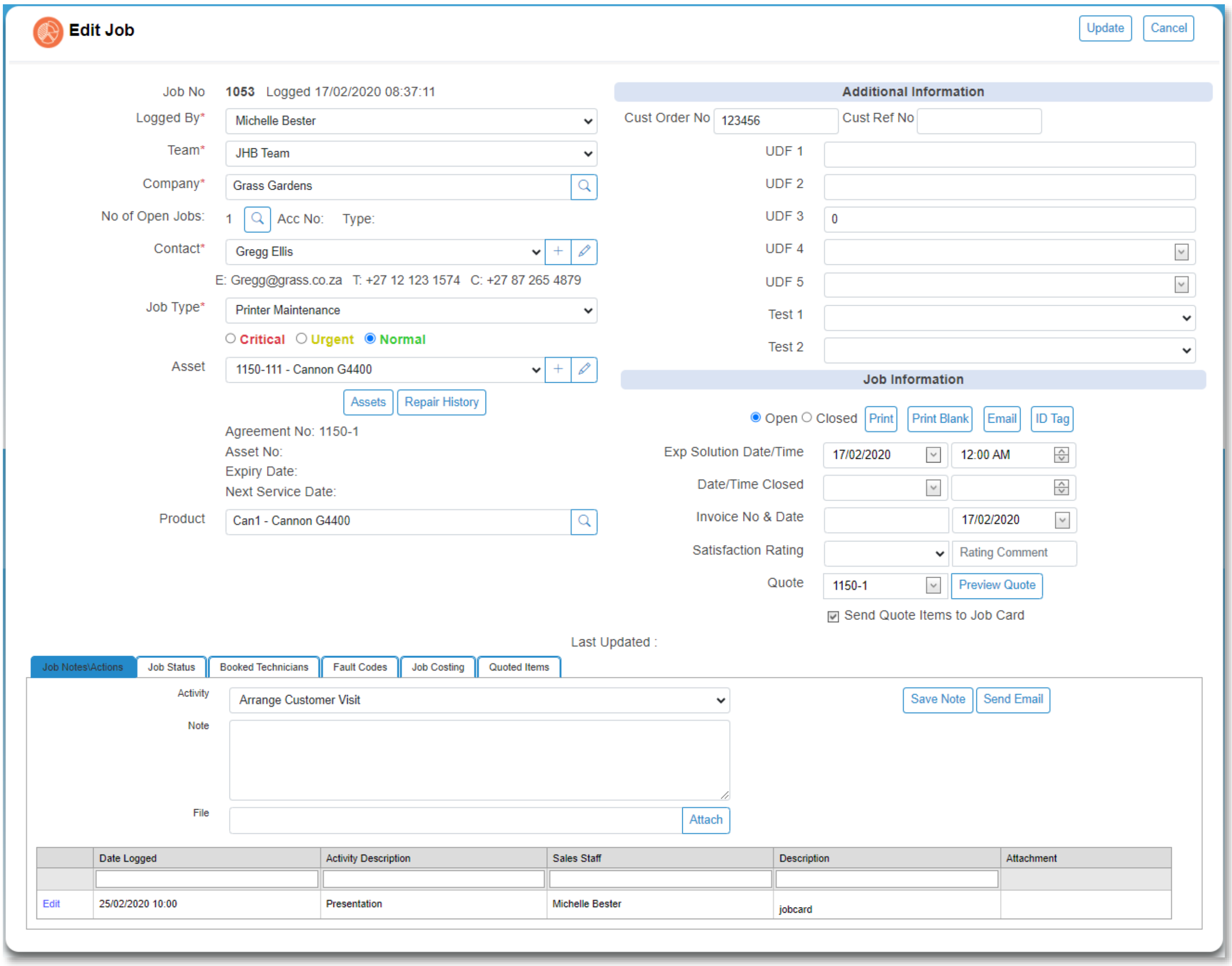


- **Equipment Status:** shows if the Current Product is Active, Inactive, On Hold or Lost (depending on setup entries).
- **Agreement Type:** the type of agreement this Current Product is subject to.
- **Agreement Start and End:** the date the agreement starts and ends.
- **Service Details:** details of when and how often the current products should be serviced.
- **Payment Details:** details of how much and how often payments should be made on this current product.
- **User Defined Fields:** any additional pertinent information required, defined in set-up.
- **Linked Doc:** an attachment can be associated with this current product. (i.e. the digital copy of the agreement)

This current product can then be viewed/ edited from the **Edit Company** page.

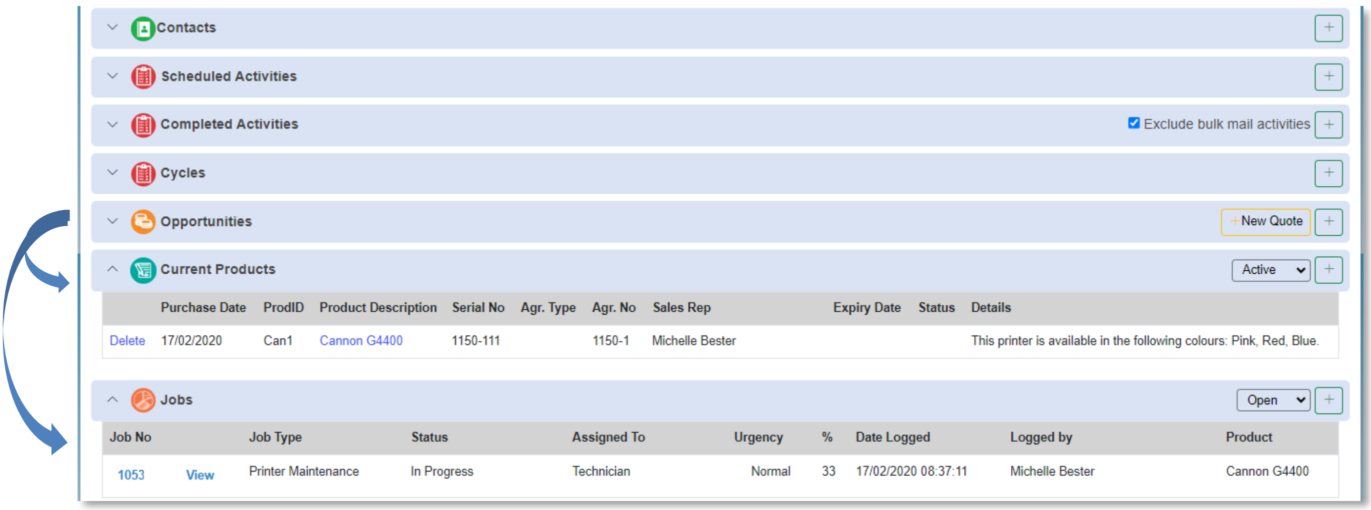
11.8.2 Job Card Created

Once the Job Card is created, the user will be directed to this page. The user can enter any information outstanding before clicking on the **Update** button.



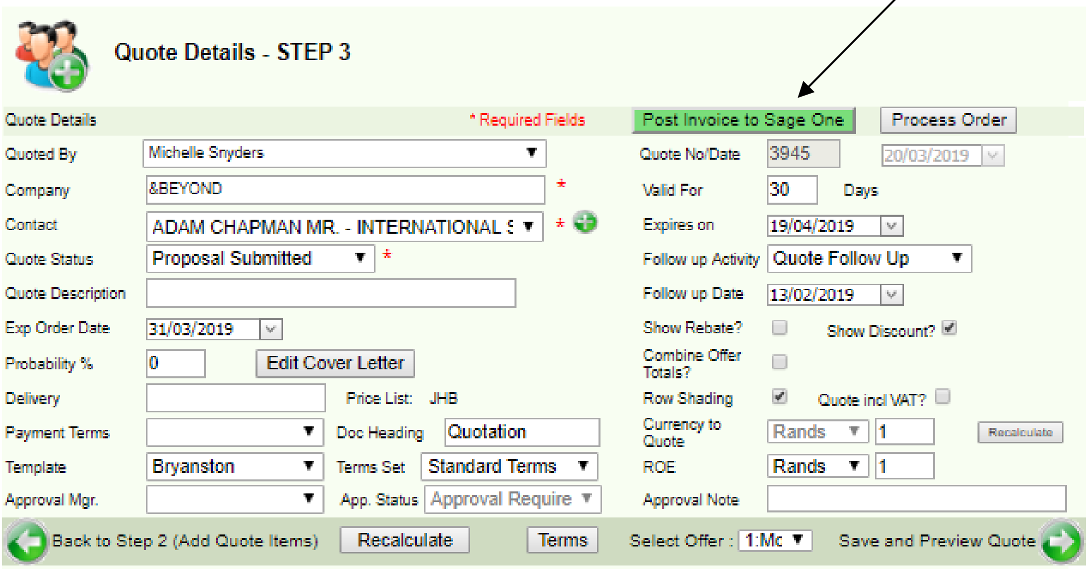
This is covered in Service Training.

This Job Card and its Status can be viewed from the **Edit Company** page.



11.9 Post to Sage Function- Step 3 of the Quote Process

In **Step 3** of the Quote process, after the quote has been previewed, the **Post Invoice to Sage One** button will show.



Clicking on the **Post Invoice to Sage One** button will direct the user to the **Post Invoice** page.

On this page the user enters the customer order number and selects the ordered items by checking the checkboxes next to the line items. When complete click on the **Post To Sage** button.

After clicking on the **Post To Sage** button, the user will be returned to **Step 3** of the Quote Process. The **Quote Status** will have changed to **Sold**. The accounts person will find the invoice in Sage One and would be able to process it further from Sage One.

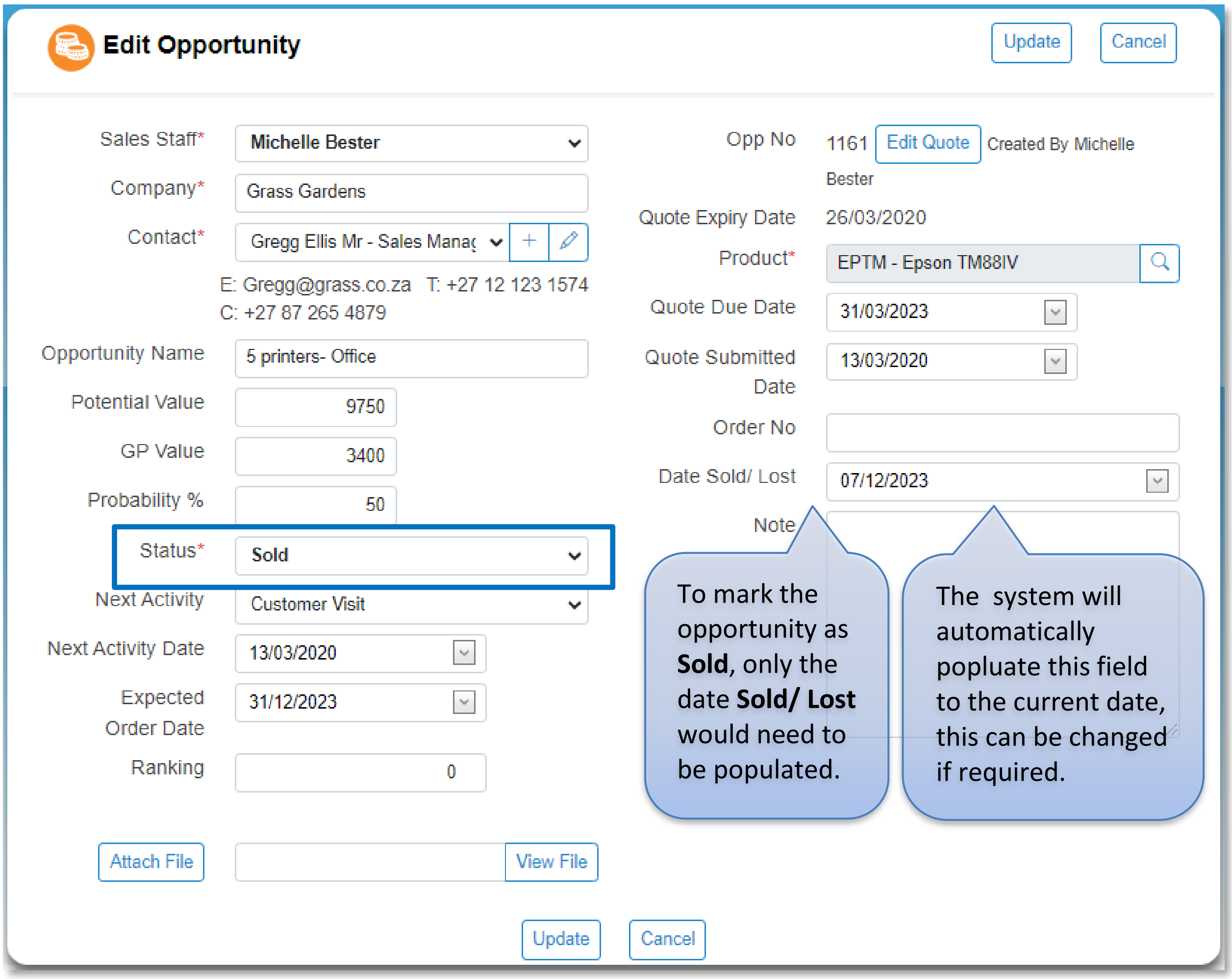
12. Closing the Opportunity or Quote

To close an Opportunity/ Quote, the user must change the **Status** of the Opportunity to ***Sold***, ***Lost*** or ***Decided Not to Buy*** on the **Edit Opportunity page**.

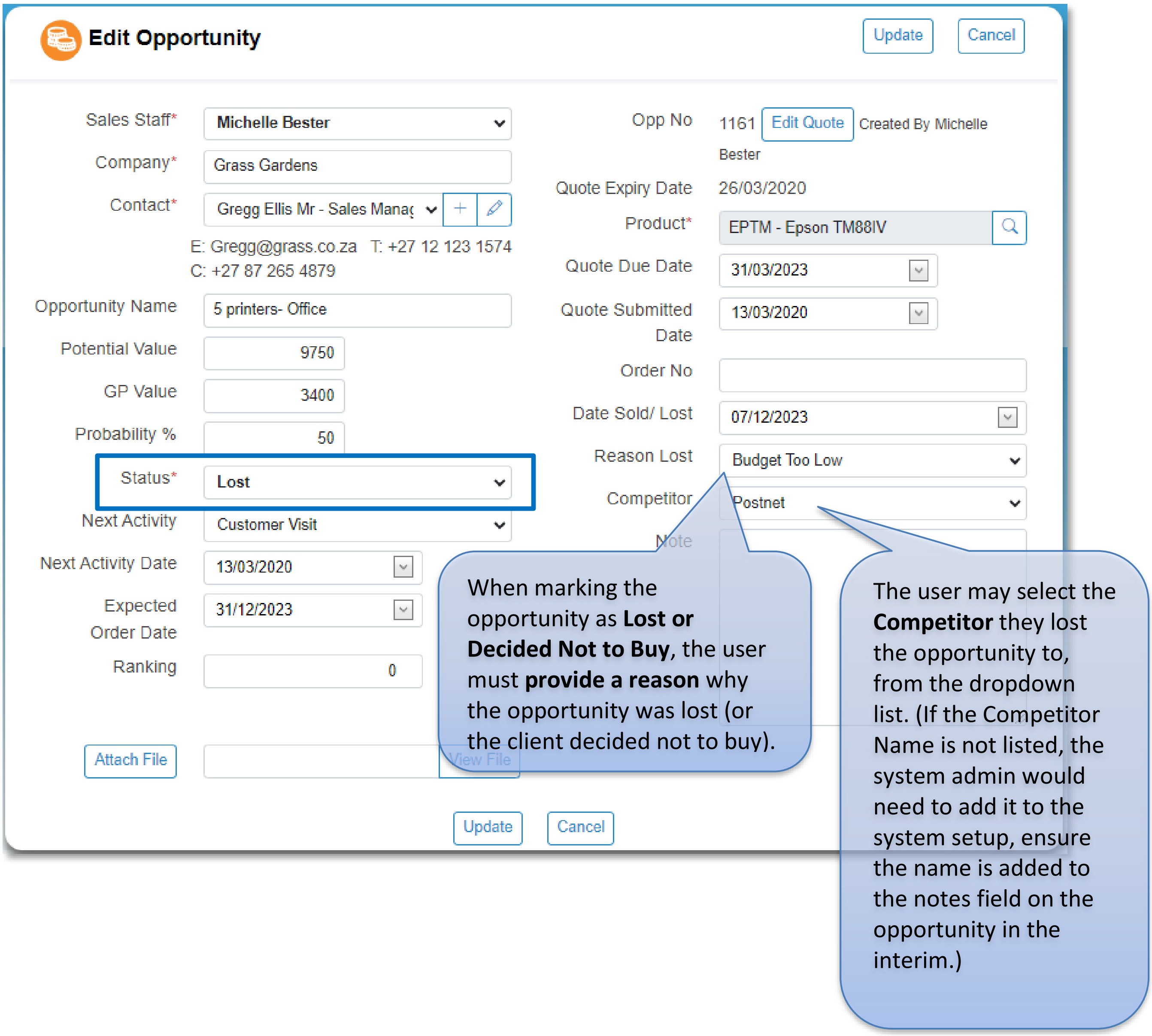
Closing the Opportunity/ Quote can also be done from:

- The **Follow up Activity** page, by changing the **Quote Status** field to **Sold**, **Lost** or **Decided Not to Buy** and then clicking on the Update button to save the activity and update the Opportunity.
- **Step 3** of The Quote Process, but changing the **Quote Status** field to **Sold**, **Lost** or **Decided Not to Buy** and then clicking on the **Save & Exit** button to save the change.

12.1 Marking the Opportunity as Sold



12.2 Marking the Opportunity as Lost / Decided Not To Buy



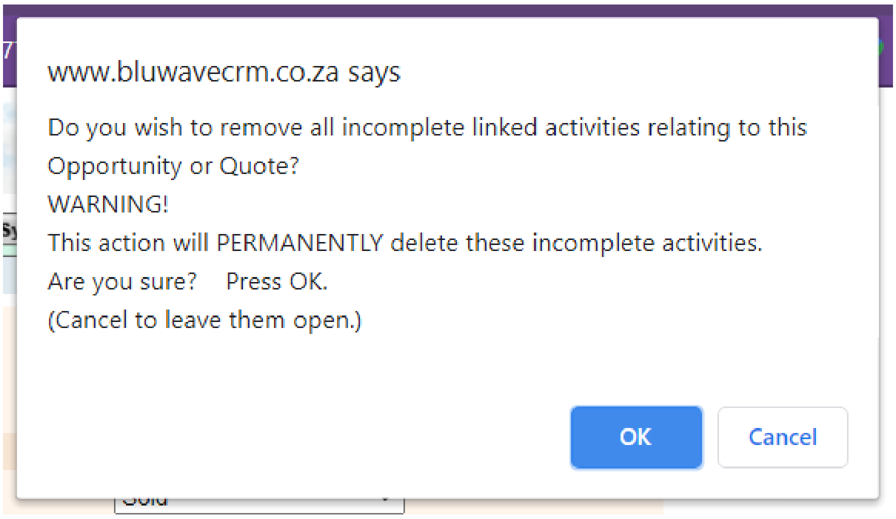
12.3 Closing the Follow up Activities linked to the Opportunity

Once the user clicks on the **Update** button of the **Opportunity** page after changing the **Status** field of the opportunity, a pop-up message will ask if they wish to keep all the linked incomplete follow up activities created for the opportunity or permanently delete those activities.

The user might wish to delete these activities, because as the opportunity/ quote is closed these activities are now irrelevant.

To delete the incomplete linked activities- click on the **OK** button.

To keep the incomplete linked activities- click on the **Cancel** button.

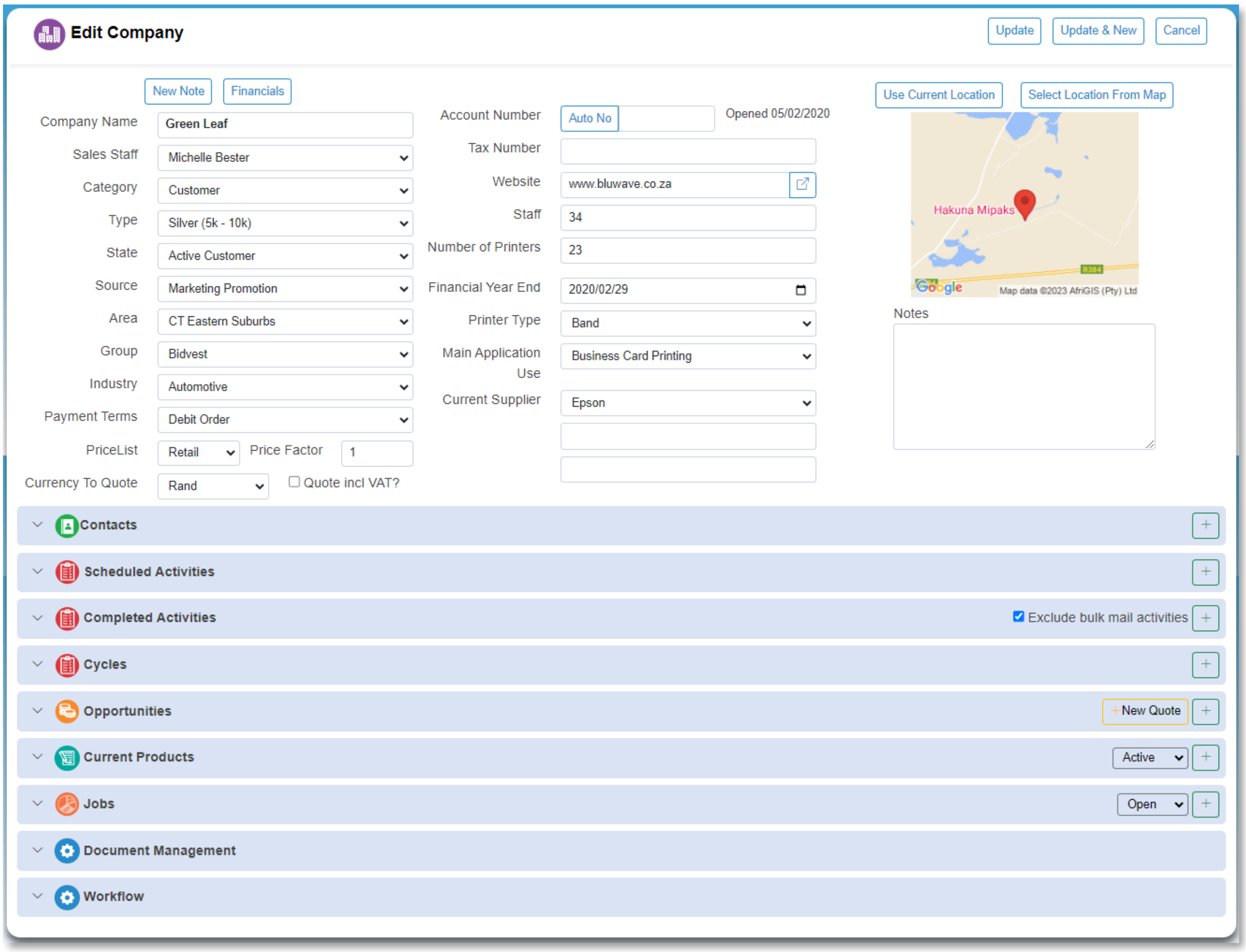


13. Update the Company page after the first Opportunity

The user should update the information on the **Edit Company** page once the client has accepted/ declined their first opportunity.

The following fields should be updated:

- The **Category** field should be changed to the Customer value (if applicable).
- The **Type** should be selected.
- The **State** should also be filled in.
- The **Account Number** of the customer on the accounting package should be added. (If applicable)



Always try to add as much information as possible to BluWave regarding the client.

Remember to click on the **Update** button at the top of the page to save the changes made.

14. Practical Activity

Please use the company you have created during the training session.

The Activity will cover the following concepts:

- Raising an Opportunity.
- Creating a Quote.
- Completing a Follow up Activity.
- Updating an Opportunity.

This exercise should be based on the user's day to day typical sales experiences.

We recommend that you read through the whole activity before starting.

Peter has contacted you asking for pricing on some of your products.

In order to record this potential sale in your system, you will need to the following:

1. Create an opportunity, ensuring that all the fields are correctly populated.

   1.1. Book a follow up telephone call for tomorrow.

The user may skip question 2 and 4 if NOT quoting from BluWave.

2. Create a quote for Peter with the following criteria:
   a) 2 options to choose from.
   b) At least 2 products under each offer.
   c) Ensure the potential quote value reflects the offer that Peter is most likely to buy.

   2.1. Remember to create a quote follow up task for tomorrow.

   2.2. Email the quote to Peter.

3. During the follow up call with Peter, he requested a better price on option 2 as he wants to order double the initial quantity you quoted him for.
   Complete the Quote Follow Up activity and record the feedback (from the call you had with Peter) in the system. ***(For training purposes please change the date of the Follow Up Activity that you created for 1.1 or 2.1 to yesterday- as you cannot complete a future dated activity)***.

4. Update and re-send the Revised Quote to Peter.

5. After 3 days, Peter sends you an email stating that he has decided not to purchase the products from you as he has managed to source them from another supplier at a cheaper rate. Update and close your opportunity accordingly.

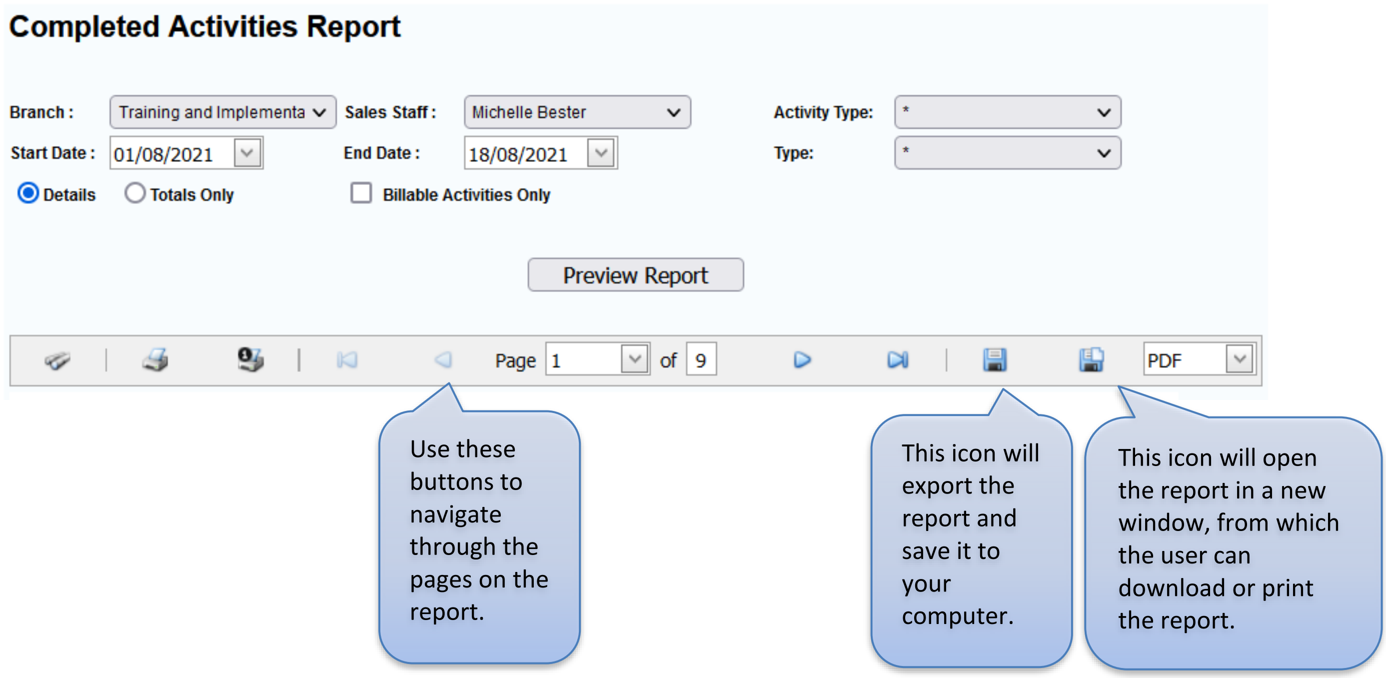
15. Reports- Companies & Activities

In the Reports tab the user can access different reports related to Companies, Activities, Opportunities and Leads.

All the reports will require the user to set some parameters before previewing the reports.
This also helps the user to streamline the information required on the reports.

The viewing access of the users will be determined by the user's rights assigned to them.

Below is an example of some of the parameters required on a report as well as an explanation of the most used functions on the preview report panel:



Once the report is previewed, the report can be **Saved** in the format selected from the dropdown on the right-hand side of the panel.

Once the report is saved, the user can find the document in their downloads folder.

15.1 New Companies Opened Reports

New Companies Opened Report

Date Created	Company Name	P/C/S	Type	Area	Source	Printer Type
Branch Description :	**Johannesburg**					
Salesperson :	**Michelle Snyders**					
State :	**Active**					
11/02/2020	**Captivation**	P	Defnite Interest	CT City Centre	Cold Call	Chain
Next Activity: 12/02/2020 Call for Demo						
Total for State :	**Active**			**1**		
Total for Salesperson :	**Michelle Snyders**			**1**		
Total for Branch :	**Johannesburg**			**1**		

15.2 Activities Scheduled Report

Scheduled Activities Report

Branch Description :	**Johannesburg**			
Salesperson :	**Michelle Snyders**			
Activity Description :	Call for Demo			
12/02/2020	00:00	0 Mins	Captivation	Gary Schultz
Call to Arrange Demo				
Total For Activity Type :	**Call for Demo**	**1**		
Activity Description :	Present Proposal			
14/02/2020	15:00	120 Mins	Captivation	Gary Schultz
Present Solution				
Total For Activity Type :	**Present Proposal**	**1**		
Total For Salesperson :	**Michelle Snyders**	**2**		
Total For Branch :	**Johannesburg**	**2**		

15.3 Completed Activities Report

Completed Activities Report

Branch Description : Johannesburg

Salesperson : Michelle Snyders

Start	End	Company Name	Contact
Activity Description :	Book Training		
10/02/2020 00:00	10/02/2020 00:00	**Adams&Adams**	Gladyce Moore
new software training Client agreed the training should be done- book for next week			
Total For Activity Type :	**Book Training**	**1**	
Activity Description :	Telephone Call		
04/02/2020 00:00	04/02/2020 00:00	**Training Michelle1**	Mr Peter Gelden
client wants to know if he can order in bulk as well as if it comes in bright pink			
10/02/2020 00:00	10/02/2020 00:00	**Green Leaf**	Bobby Roots
phone to check on order Client will send it to me tomorrow			
Total For Activity Type :	**Telephone Call**	**2**	
Total For Salesperson :	**Michelle Snyders**	**3**	

15.4 Overdue Activities Report

Overdue Activities Report

Branch Description : Johannesburg

Salesperson : Thobanjalo Shangase

Company Name	Contact	Activity	Start Date	Days Overdue
BluWave Software	Mr Dylan Cooke-Tonnesen	Quote Follow Up	17/05/2019	270
Afrox	Ms Stuart Lowe	Customer Survey	26/08/2019	169
kitty place	Cassy Darren	Deliver Contract	26/08/2019	169
Moloi Media	MR Dylan Cooke-Tonnesen	Collect Printer For Service/Repair	27/08/2019	168
Big 5 Guards	Mr Kendall Lowe	Cartridge Deliver/Change	28/08/2019	167
Chet Chemicals	Ms Karlien Oberholster	Printer Repair	29/08/2019	166
Explore.net	MR Ronald Durant	Collect Printer For Service/Repair	30/08/2019	165
Total Overdue Activities for :	**Thobanjalo Shangase**	**7**		
Total Overdue Activities for :	**Johannesburg**	**7**		

15.5 Companies Last Called

This report would show which companies was last called before a certain date.

Companies Last Called

Company Name	Area	Type	Last Date	Days Since Last Call
Sales Person: Michelle Bester				
Macdonalds	CT City Centre	Small	21/11/2018	902
Brittan Health Care (Zwelethu Capital		Medium	27/11/2018	896
Imperial Logistics	CT Southern Suburbs	Silver (5k - 10k)	14/12/2018	879
SANPARKS	PTA Southern Suburbs	Large	20/12/2018	873
Chet			05/02/2019	826
Random Comp	PTA Centurion	Small	08/02/2019	823
Hulettes	JHB City Centre	Small	22/02/2019	809
kitty place	JHB Northern Suburbs	Small	06/03/2019	797
Pickle Company			08/03/2019	795
Steve Bhiko Hospital	PTA City Centre	Small	13/08/2019	637
Lollipop Company			11/02/2020	455
Grass Gardens			14/02/2020	452
			02/04/2020	404

15.6 Travel Claim Report

The system will also generate a travel claim report based on the location of the user Face-To-Face activities.

Travel Claim Report By Rep and Date

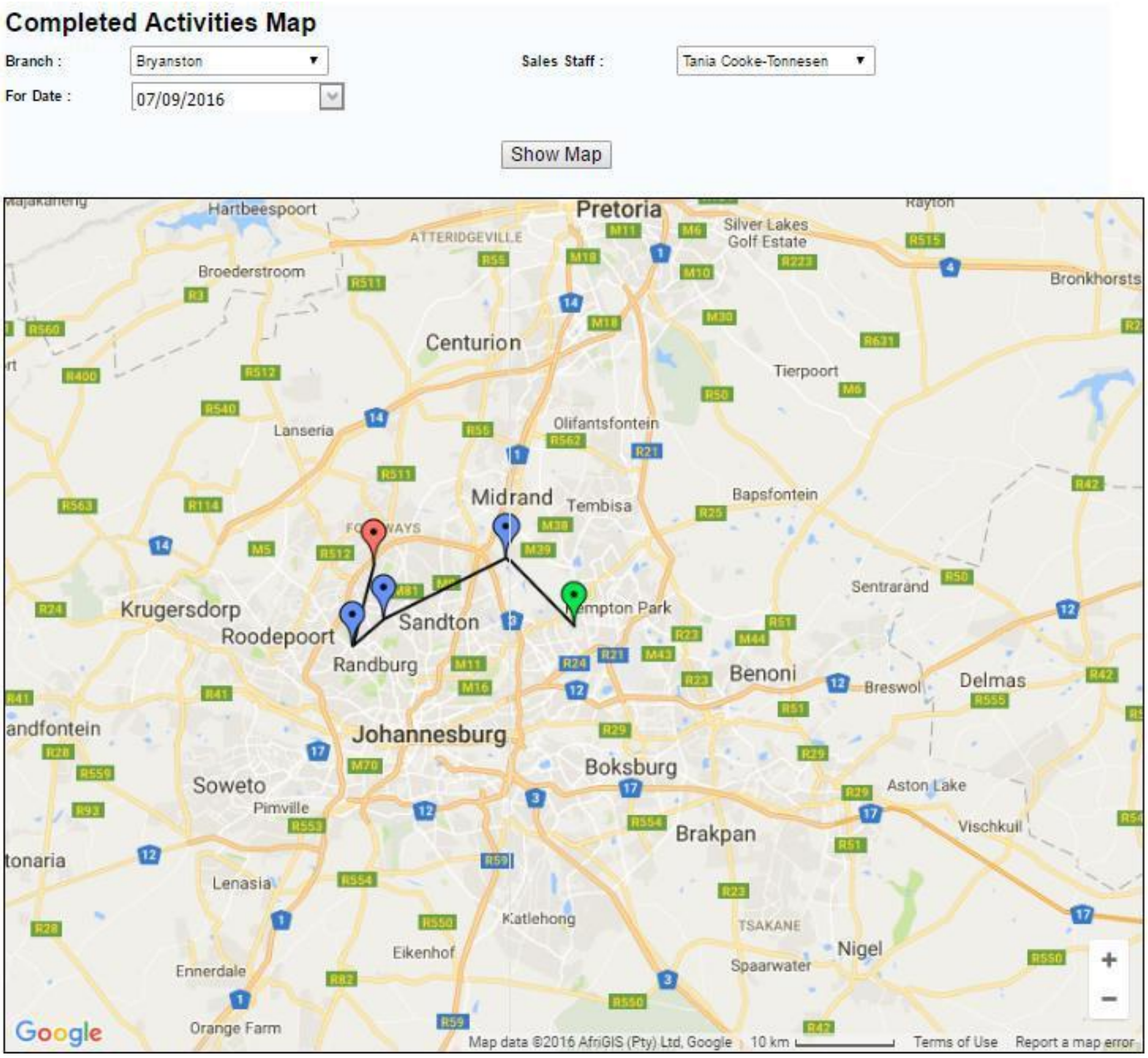
For Period : 01/02/2020 to 29/02/2020

* Indicates a difference of more than 1 km between the completed activity and the company.

Activity Date	Company Name	Contact	Activity	Distance(Km)	Cost
Branch Description :	**Bryanston**				
Sales Staff :	**Tania Cooke-Tonnesen**			**Rate per Km: 2.50**	
2020-02-03 14:00	Solo Resources	Geoff Naude	BluWave Consultation	4.4 *	11.00
2020-02-03 23:59	Office		Office	4.8	12.00
Total For Date :	**1**			**9.1**	**23.00**
2020-02-11 00:00	DO TECH	Shannon De Saint Pern	BluWave Consultation	11.6 *	29.00
2020-02-11 23:59	Office		Office	11.3	28.25
Total For Date :	**1**			**22.8**	**57.25**
Total For Rep :	**2**	**Avg.Dist.: 15.98**		**32.0**	**80.25**
Total For Branch :	**2**	**Avg.Dist.: 15.98**		**32.0**	**80.25**

15.7 Location Tracking

When completing a Face-to-Face activity, the system will pick up the user's location at that time and store it. A report can be drawn that will show the locations of all these completed activities for a specific salesperson for a specified date.



16. Reports- Opportunities & Quotes

16.1 Opportunities Issues Report

Opportunities Issued Report

Date	Quote No	Company & Contact	Opportunity Name	Product	Status	Potential Value	GP Value
Branch Description :		**Johannesburg**					
Salesperson :		**Michelle Snyders**					
Product Group :		**Printers**					
2020-02-05	1142	**Training Michelle1** Michelle Snyders (Left)	**5 printers- Office** guessing 2000 per printer	Cannon G4400	First Demonstration	R38,690.00	R10,090.00
2020-02-14	1152	**Vodacom** Ms Nicola Potgieter	**Commercial Printers**	Heidelberg Five Colour Offset Printing Pre	Quote Stage	R90,000.00	R19,000.00
2020-02-14	1150-1	**Grass Gardens** Mr Gregg Ellis	**8 Office Printers**	Cannon G4400	Lost	R183,200.00	R61,600.00
2020-02-14	1151	**Green Leaf** Bobby Roots	**8 Office Printers**	Cannon G4400	Quote Stage	R3,400.00	R900.00
Total For :		**Printers**			**4**	**R315,290.00**	**R91,590.00**
Product Group :		**Quoted Products**					
Date	**Quote No**	**Company & Contact**	**Opportunity Name**	**Product**	**Status**	**Potential Value**	**GP Value**
2020-02-05	1143	**Green Leaf** Bobby Roots	**London to Germany** sdfghjklkjhgfd	Quoted Products	Enquiry	R20,000.00	R0.00
2020-02-13	1149	**Vodacom** Ms Nicola Potgieter	**5 Commodities; 3 Blended**	Quoted Products	Negotiation	R900,000.00	R0.00
2020-02-13	1148	**Green Leaf** Bobby Roots	**Printers- 6- Office Use**	Quoted Products	Enquiry	R12,000.00	R6,000.00
Total For :		**Quoted Products**			**3**	**R932,000.00**	**R6,000.00**
Total For :		**Michelle Snyders**			**7**	**R1,247,290.00**	**R97,590.00**
Total For :		**Johannesburg**			**7**	**R1,247,290.00**	**R97,590.00**

16.2 Quotes Issued Report

Quotes Issued Report

Branch Description : Johannesburg

Salesperson : Michelle Snyders

Created By	Quote Date	Quote No	Company Name	Potential Value	GP Value	Quote Submitted	Lead Time Days	Lead Time Hours
Michelle Snyders	2020-02-05	1142	Training Michelle1 5 printers- Office	R38,690.00	R10,090.00	05/02/2020	0	5
	2020-02-05	1143	Green Leaf London to Germany	R20,000.00	R0.00		0	0
Michelle Snyders	2020-02-13	1148	Green Leaf Printers- 6- Office Use	R12,000.00	R6,000.00		0	0
	2020-02-13	1149	Vodacom 5 Commodities; 3 Blended	R900,000.00	R0.00		0	0
Michelle Snyders	2020-02-14	1150-1	Grass Gardens 8 Office Printers	R183,200.00	R61,600.00	14/02/2020	0	0
Michelle Snyders	2020-02-14	1151	Green Leaf 8 Office Printers	R3,400.00	R900.00	14/02/2020	0	3
Michelle Snyders	2020-02-14	1152	Vodacom Commercial Printers	R90,000.00	R19,000.00		0	0
Totals for : Michelle Snyders			**7**	**R1,247,290.00**	**R97,590.00**			
Totals for : Johannesburg			**7**	**R1,247,290.00**	**R97,590.00**			

16.3 Opportunities due by Sales Staff and Status Report

Opportunities Due By Sales Staff, Status Report

For Period 01/02/2020 To 29/02/2020

Exp. Order Date	Company	Quote #	Opp Name / Note	Pot. Sale Value	Prob %	Exp. Value	GP %	GP Value
Branch Description :	**Johannesburg**							
Salesperson :	**Michelle Snyders**							
Status :	**Enquiry**							
29/02/2020	**Adams&Adams**	1137	5 printers	R1,500,000.00	0	R0.00	0.00%	R0.00
	Next Action : None							
29/02/2020	**BluWave Software**	1132		R650,000.00	0	R0.00	0.54%	R3,500.00
	Next Action : Service Call 18/02/2020							
29/02/2020	**Green Leaf**	1143	London to Germany	R20,000.00	12	R2,400.00	0.00%	R0.00
	Next Action : Quote Follow Up 19/02/2020		Note: sdfghjklkjhgfd					
29/02/2020	**Green Leaf**	1148	Printers- 6- Office Use	R12,000.00	20	R2,400.00	50.00%	R6,000.00
	Next Action : Quote Follow Up 19/02/2020							
Total Opportunities Due For :	**Enquiry**		**4**	**R2,182,000.00**		**R4,800.00**		**R9,500.00**
Status :	**First Demonstration**							
29/02/2020	**Afrox**	1035		R0.00	0	R0.00	0.00%	R0.00
	Next Action : None							
29/02/2020	**BluWave Software**	1073		R1,200,000.00	0	R0.00	0.00%	R0.00
	Next Action : Service Call 18/02/2020							
29/02/2020	**kitty place**	1070		R2,500.00	0	R0.00	0.00%	R4,850.00
	Next Action : None							
29/02/2020	**MTN**	1038		R200,000.00	0	R0.00	0.00%	R0.00
	Next Action : None							
29/02/2020	**Training Michelle1**	1142	5 printers- Office	R38,690.00	80	R30,952.00	26.08%	R10,090.00
	Next Action : None		Note: guessing 2000 per printer					
Total Opportunities Due For :	**First Demonstration**		**5**	**R1,441,190.00**		**R30,952.00**		**R14,940.00**
Total Opportunities Due For :	**Michelle Snyders**		**9**	**R3,623,190.00**		**R35,752.00**		**R24,440.00**
Total Opportunities Due For :	**Johannesburg**		**9**	**R3,623,190.00**		**R35,752.00**		**R24,440.00**

16.4 Opportunities Won and Lost by Rep Report

Opportunities Won and Lost By Salesperson Report

For Period 01/02/2020 To 29/02/2020

Branch Description :	**Johannesburg**						
Salesperson :	**Michelle Snyders**						
Opportunity State :	**Decided not to buy**						
Status :	**Decided Not to Buy**						
Company Name	**Product**	**Quote No**	**Pot. Value**	**GP Value**	**Date**	**Reason Lost**	**Competitor**
Adams&Adams	Epson TM88IV	1138-2	R32,275.00	R5,276.00	17/02/2020	Out of Budget	
Total For :	**Decided Not to Buy**	**1**	**R32,275.00**	**R5,276.00**			
Total For :	**Decided not to buy**	**1**	**R32,275.00**	**R5,276.00**			
Opportunity State :	**Sold**						
Status :	**Sold**						
Company Name	**Product**	**Quote No**	**Pot. Value**	**GP Value**	**Date**	**Reason Lost**	**Competitor**
Spur Steak Ranches	Quoted Products	1107	R10,500.00	R4,150.00	17/02/2020		
Total For :	**Sold**	**1**	**R10,500.00**	**R4,150.00**			
Total For :	**Sold**	**1**	**R10,500.00**	**R4,150.00**			
Total For :	**Michelle Snyders**	**2**	**R42,775.00**	**R9,426.00**			
Total For :	**Johannesburg**	**2**	**R42,775.00**	**R9,426.00**			

16.5 Forecast of Revenue from Quote Lines

First Page- shows the line items with the revenue in the relevant month the expected order date of the opportunity was set to.

Forecast of Revenue Flow from Quote Lines

For Period May 2021 to October 2021

Company	Quote #	Product	Oppotunity Name	Status	Exp. Order Date	No of Months	May	Jun	Jul	Aug	Sep	Oct
Branch Description :	**Johannesburg**											
Salesperson :	**Michelle Bester**											
Product Group :	**Custom Quoting**											
BluWave Software	1289	Acrylic Fabricated Signage - Illuminated	Compressor Replacement	Quote Stage	31/05/2021	1	R5,500	R0	R0	R0	R0	R0
BluWave Software	1293	Acrylic Fabricated Signage - Illuminated	test 2	Quote Stage	31/05/2021	1	R5,500	R0	R0	R0	R0	R0
BluWave Software	1133	Extrusion	testing output	Quote Stage	31/05/2021	1	R300	R0	R0	R0	R0	R0
BluWave Software	1304	Acrylic Fabricated Signage - Illuminated	sdfsdf	Enquiry	31/05/2021	1	R1,000,000	R0	R0	R0	R0	R0
BluWave Software	1089	Extrusion		Quote Stage	31/05/2021	1	R100	R0	R0	R0	R0	R0
Unitas Hospital	1299	Acrylic Fabricated Signage - Illuminated	test 3	Quote Stage	31/05/2021	1	R5,500	R0	R0	R0	R0	R0
Green Leaf	1211-1	Acrylic Fabricated Signage - Illuminated	2 Commercial	Quote Stage	31/05/2021	1	R27,500	R0	R0	R0	R0	R0
Afrox's	1035	Extrusion		First Demonstration	31/05/2021	1	R0	R0	R0	R0	R0	R0
Afrox's	1269	Extrusion	Testing	Quote Stage	31/05/2021	1	R0	R0	R0	R0	R0	R0
Training Michelle	1336	Acrylic Fabricated Signage - Illuminated	test gp	Quote Stage	31/05/2021	1	R5,500	R0	R0	R0	R0	R0
Total Product Group :	**Custom Quoting**						R1,049,900	R0	R0	R0	R0	R0
Product Group :	**Ink Cartridges**											
Training Michelle	1334	XL Yellow Ink - 920	yesy	Quote Stage	31/05/2021	1	R450	R0	R0	R0	R0	R0
Mountain Range	1232	XL Yellow Ink - 920	6 Printer- Private Use	Quote Stage	31/05/2021	1	R450	R0	R0	R0	R0	R0
MCB Constructions	1249	XL Yellow Ink - 920		Quote Stage	31/05/2021	1	R450	R0	R0	R0	R0	R0
BluWave Software	1133	Black Tub - Printing Press	testing output	Quote Stage	31/05/2021	1	R8,000	R0	R0	R0	R0	R0
Steam	1276-1	HP Ink Blue - 650	Printers - 2 Private	Quote Stage	31/05/2021	1	R300	R0	R0	R0	R0	R0
Steam	1276-1	HP Ink Blue - 650	Printers - 2 Private	Quote Stage	31/05/2021	1	R300	R0	R0	R0	R0	R0
ADT/Fidelity	1328	HP Ink Pink - 650	Printers- 2	Quote Stage	31/05/2021	1	R300	R0	R0	R0	R0	R0
Anglo America	1283	HP Ink Pink - 650	test exit	Quote Stage	31/05/2021	1	R300	R0	R0	R0	R0	R0
ADT/Fidelity	1328	Yellow Tub - Printing Press	Printers- 2	Quote Stage	31/05/2021	1	R4,000	R0	R0	R0	R0	R0
ADT/Fidelity	1328	Yellow Tub - Printing Press	Printers- 2	Quote Stage	31/05/2021	1	R8,000	R0	R0	R0	R0	R0

11 May 2021 Page 1 of 11

On the last page of the report a summary of the forecast per product group will show.

Forecast of Revenue Flow from Quote Lines

For Period May 2021 to October 2021

Company	Quote #	Product	Oppotunity Name	Status	Exp. Order Date	No of Months	May	Jun	Jul	Aug	Sep	Oct
Unitas Hospital	1300	Vinyl Cutter Blade Replacement (10 x 60")	test 4	Quote Stage	31/05/2021	1	R420	R0	R0	R0	R0	R0
Testing	1210	Vinyl Cutter Blade Replacement (10 x 60")	test 890	Enquiry	31/05/2021	1	R420	R0	R0	R0	R0	R0
Total Product Group :	**Vinyl Products**						R1,512	R0	R0	R0	R0	R0
Total Salesperson:	**Michelle Bester**						R3,202,175	R37,600	R37,600	R37,600	R37,600	R17,600
Branch Description :	**Johannesburg**											

Product Group Totals

Product Group	May	Jun	Jul	Aug	Sep	Oct
Custom Quoting	R1,049,900	R0	R0	R0	R0	R0
Ink Cartridges	R244,435	R0	R0	R0	R0	R0
Misc Items	R40	R0	R0	R0	R0	R0
Paper	R19,035	R0	R0	R0	R0	R0
Printers	R1,877,894	R37,600	R37,600	R37,600	R37,600	R17,600
Quoted Products	R9,360	R0	R0	R0	R0	R0
Vinyl Products	R1,512	R0	R0	R0	R0	R0
Total	R3,202,175	R37,600	R37,600	R37,600	R37,600	R17,600

17. Appendix

17.1 A- Quote Example- Format 1

Quotation

Quote No:	**1150-1**	Date:	**14/02/2020**
Acc No:		Valid for:	**14 Days**
To:	**Grass Gardens**	Address:	
Att:	**Mr Gregg Ellis**		
Tel:		From:	**Michelle Snyders**
Fax:		Tel:	**011 462 6871**
Cell:		Cell:	**074 586 3506**
Email:	**Gregg@grass.co.za**	Email:	**mibpsnyders@gmail.com**

Dear **Gregg**

Re: **8 Office Printers**

We thank you for the opportunity afforded us to quote you on the Lazer Business Equipment. (Quote Header Paragraph)

Option 1

Description	Qty	Price	Total
Cannon G4400 This printer is available in the following colours: Pink, Red, Blue.	8	3,400.00	27,200.00
Black Tub - Printing Press	8	4,000.00	32,000.00

No Offer Total is showing- Settings were selected to exclude this Total.

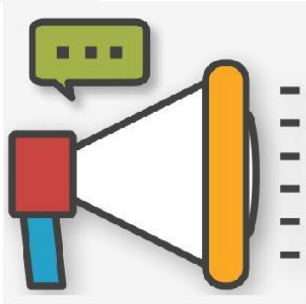
23 March 2020 Page 1 of 3

Quotation

No: 1150-1

Option 2

Description	Qty	Price	Total
Epson TM88IV	8		
Black Tub - Printing Press	8		



TOTAL (Ex VAT) :	**R 72,000.00**
VAT :	**R 10,800.00**
Total:	**R 82,800.00**

No Line Price Totals is showing- Settings were selected to exclude this Total.

Option 3

Description	Qty	Price	Total
HP MFP m277dw	8	6,500.00	52,000.00

TOTAL (Ex VAT) :	**R 52,000.00**
VAT :	**R 7,800.00**
Total:	**R 59,800.00**

Option 4

Description	Qty	Price	Total
Cannon G4400 This printer is available in the following colours: Pink, Red, Blue.	8	3,400.00	27,200.00

23 March 2020

Page 2 of 3

Quotation

No: 1150-1

Option 4

Description	Qty	Price	Total
Black Tub - Printing Press	8	4,000.00	32,000.00
		GRAND TOTAL (Ex VAT) :	**R 242,400.00**
		VAT :	**R 36,360.00**
		GRAND TOTAL:	**R 278,760.00**

Deposit
50/50

Cancelling
NO

Currency of the Quote
This quote is done in the following currency: Rand

Rate of Exchange
This quote is done using the following rate of exchange: Rand 1.00 = Rand 1.00

ROE
R 1.00 = Rand 1.00

Should you require any further information, please do not hesitate to contact us on (011) 462 7456 (Quote Footer Paragraph)

Michelle Snyders
Implementation Consultant
074 586 3506
mibpsnyders@gmail.com

The Grand Total will only show if selected to show on Step 3 of the Quote process.

23 March 2020

Page 3 of 3

18. Revision History

Version	Date	Updates
SM0018.7	11/05/2021	• Updated the Cycles Heading. • Updated the Diary Planner Heading. • Added the Copy Quote Function. • Updated the Order of the Quote Automation Process. • Added a few more examples of Reports available and moved all the reporting to the back of the manual. • Updated the Closing of an Opportunity Heading. • Added the Post To Sage Heading. • Updated the System Process Overview with new page numbers. • Update the Practical Activities.
SM0018.8	11/08/2021	• Added the Contact Profile Keywords function. • Updated the Reports explanation. • Updated the List of other available manuals.
SM0018.9	03/09/2021	• Corrected sentence mistakes. • Updated Practical Activity 2.
SM0018.10	30/09/2023	• Added & Updated the Content and Images as per the new release screens. • Removed the Content no longer applicable.