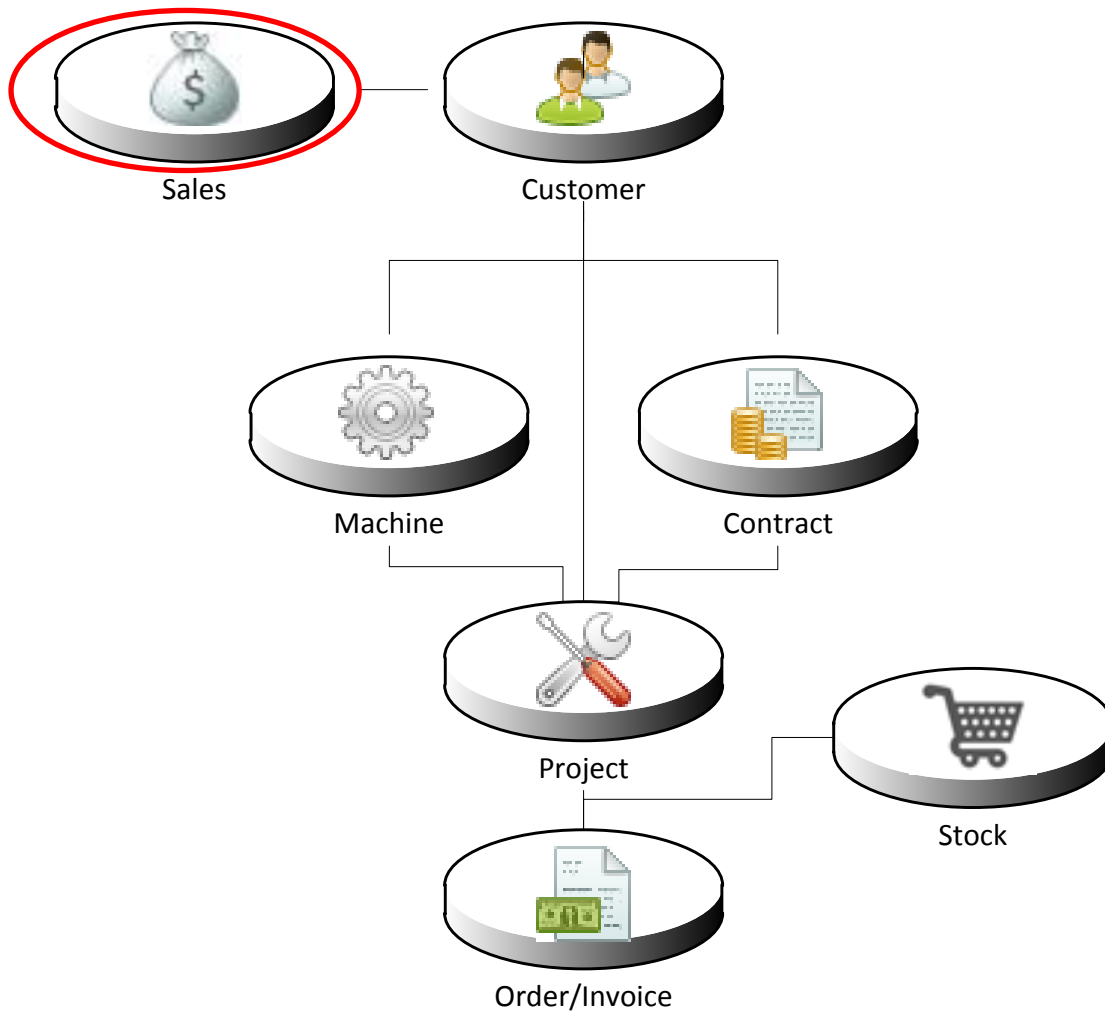# Sales project

Several modules exist in Evatic Service, and all are connected to each other in a seamless workflow.

This document describes the general workflow for sales projects in Evatic Service, marked with red in the figure below:
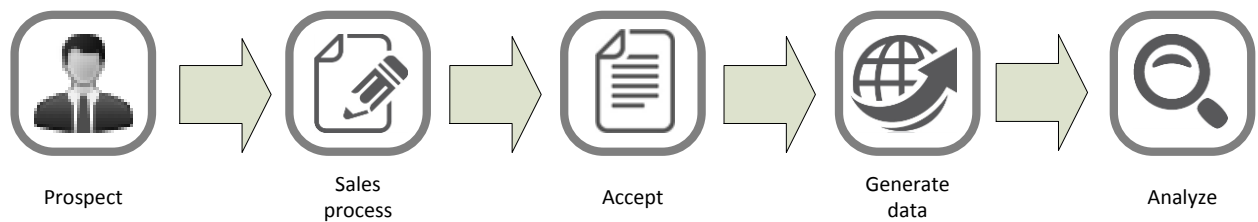
Sales projects

A sales project in Evatic Service has to be connected to a prospect or an existing customer.

All the steps in the process of making a sales project are described and it's explained where more detailed documentation can be found.

The figure below shows a detailed description of the activities in the workflow for sales projects.

| Prospect | Sales process | Accept | Generate data | Analyze |

Prospect

A prospect or a customer is manually created in Evatic or exported to Evatic from an external system.

> See user manual or help file on how to create a prospect or a customer in Evatic Service.

Sales process

The sales process starts with creating a sales project in Evatic Service. The sales project needs to be connected to a prospect or an existing customer.

The salesman can register all activities connected to this sales project under the tab Activities.

See user manual or help file on how to create an activity.

E-mails and documents can be sent to the customer/prospect from the sales project.

> **!** Documents can be converted to PDF-files before they are sent to the prospect/customer

> **!** Activities, documents and e-mails connected to the sales project are automatically registered under the event tab on the customer card.

The final stage of the sales process is creating and sending an offer to the prospect/customer. The articles included in the offer are entered under the details tab on the sales project, and the offer is created by using a document template.

The offer is sent to the prospect/customer directly from the sales project.

Accept offer

In this example the prospect/customer accepts the offer.

When the offer is accepted by the prospect/customer the salesman approves the sales project in Evatic.

Remember to change the probability to 100 % before approval.

Generate data

When the offer is accepted and the sales project is approved, data can be generated.

An order is automatically created based on the order lines added on the sales project.

When the order is completed, an invoice can be created and printed in Evatic, or the order can be exported to an external system for invoicing.

If the sales project contains a new machine and the machine needs to be installed at the customer, a service project can be generated directly from the sales project.

> ❗ If the sales project is connected to a prospect, the prospect needs to change status to customer before an order or a service project is created.
>
> See user manual or help file for more detailed information.

Analysis

In addition to the workflow of sales project, Evatic Service provides the ability to analyze the data connected to handling sales projects. Detailed reports can be created in Evatic Service for analyzing revenue, cost and profitability and more. All reports can be exported to excel for further analysis.