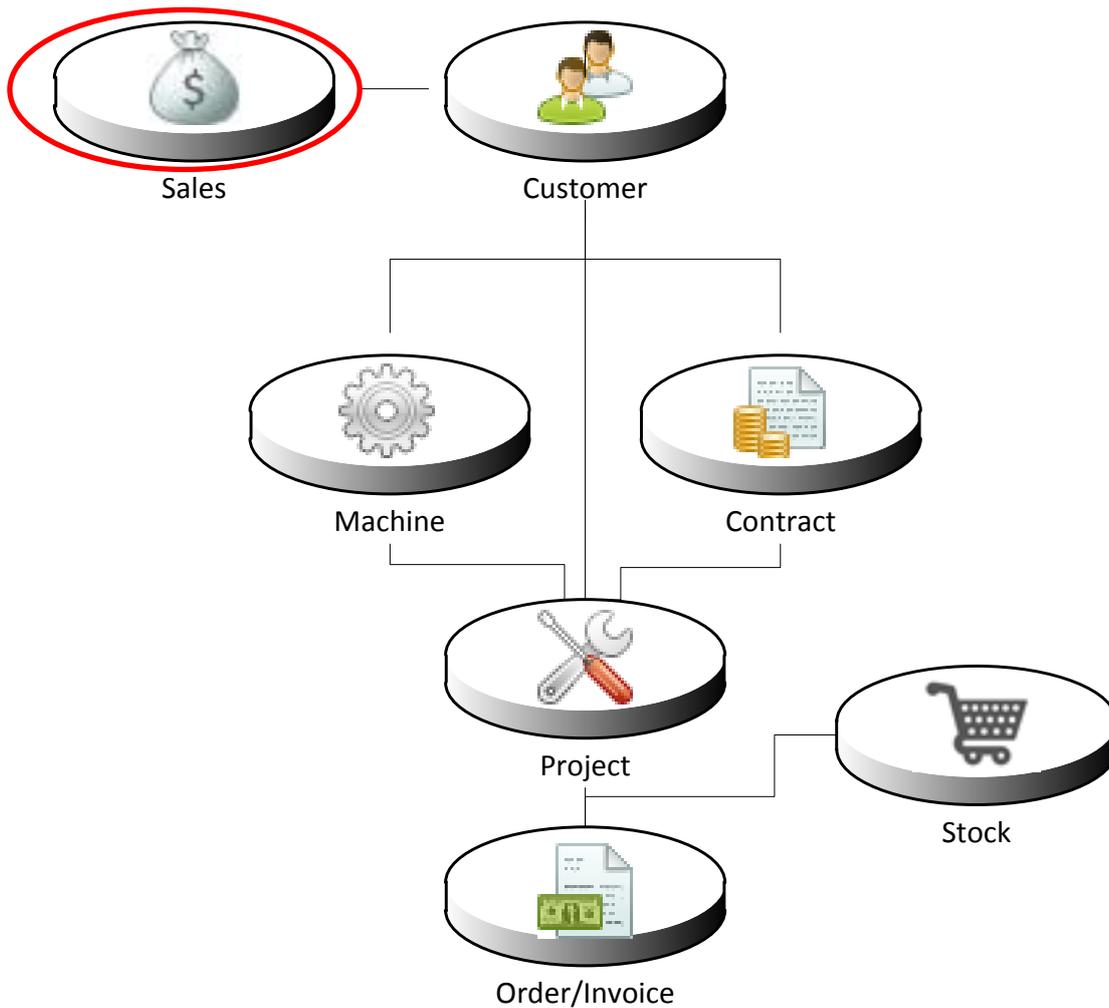


Sales project

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:

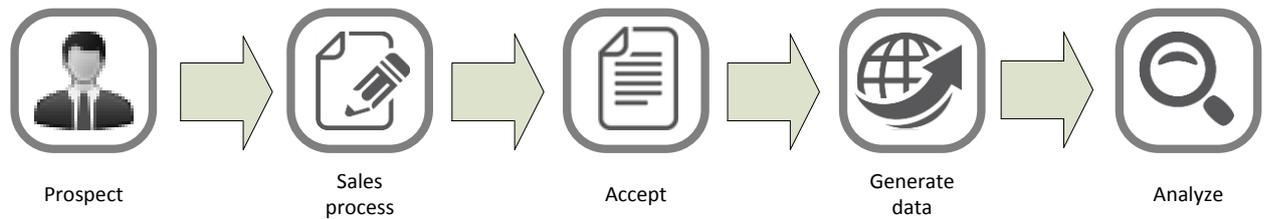


Sales projects

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

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

Customer 1296 Visma Retail AS

Summary **Address** Details Groups Windows Explorer Evatic Intranet

Visma Retail AS

Customer: 1296 Visma Retail AS Debtor: Main office:

Country: 47 Language:

Address name: Visma Retail AS Bank name: IBAN:

Address 1: Wirgenes vei 1 Bank id: BIC:

Address 2: Account no:

Address 3: Area: Use fixed price from area

Post code: 3157 BARKÅKER Phone/fax: 33 34 94 00 33 34 94 01

Send invoice as email
regnskap.retail.no@visma.com

Visit Invoice Delivery Post

Active	Name	Address 1	Address 2	Address 3	Post code	Post location
<input checked="" type="checkbox"/>	Visma Retail AS	Wirgenes vei 1			3157	BARKÅKER

Active address

Contacts | Events | Notes | Products | Contracts | External products | Advanced

Name	eMail 1	eMail 2	Job title	Telephone	Telefax	Mobile phone	Address name	Address 1	Address 2
	svet.lere.lermo@visma.com		UPDATE MAI				Visma Retail AS	Wirgenes vei 1	
	cecilie.thoresen@visma.com		UPDATE MAI				Visma Retail AS	Wirgenes vei 1	
	christian.torvund@visma.com		UPDATE MAI				Visma Retail AS	Wirgenes vei 1	
	dagfinn.molde@visma.com		UPDATE MAI				Visma Retail AS	Wirgenes vei 1	
	erik.myrstuen@visma.com		UPDATE MAI	33349485			Visma Retail AS	Wirgenes vei 1	
	regnskap.retail.no@visma.com		UPDATE MAI				Visma Retail AS	Wirgenes vei 1	
	gunnbjorg.snortheimsmoen@visma.com		UPDATE MAI				Visma Retail AS	Wirgenes vei 1	
	kari.bjorn-hansen@visma.com		UPDATE MAI				Visma Retail AS	Wirgenes vei 1	
	kare.knutsen@visma.com		Employee	33 34 94 00			Visma Retail AS	Wirgenes vei 1	
	kare.knutsen@visma.com	Kare.RuudKnutsen@visma.com	UPDATE MAI	98289425		98289425	Visma Retail AS	Wirgenes vei 1	
	Lars.Bill@visma.com	Lars.Bill@visma.com	UPDATE MAI	33 34 94 18		98 28 94 18	Visma Retail AS	Wirgenes vei 1	



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.

Sales project 463 : New offer

Sales project: Created:
 Customer no.: Sales project open Last changed:
 Customer:
 Contact:
 Reference:
 Probability: Customer Respond:
 Decision date:
 Sum:

Activities | Documents | **Details** | Calculations | Notes | E-mail | Serviceprojects

Properties

Property	Value
*	

Project groups

Order no.	Status

Order lines

No.	Article no.	Description	Unit	Cost price	Sales price	Qty.	Discount	V.A.T.	Result	%	Info 1
*											

Total cost: Total sales: Result:

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

Sales project 463 : New offer

Sales project: Created:
 Customer no.: Sales project open Last changed:
 Customer:
 Contact:
 Reference:
 Probability:
 Decision date:
 Sum:

Activities | Documents | **Details** | Calculat

Activity

Subject:

Complete Priority:

Comments:

Start: Time

Private (invisible to other users)

Reminder: Reminder Evatic

E-mail E-mail 1 E-mail 2

Customer no.:
 Customer:
 Contact:
 Category:
 Project:
 State:



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.

The screenshot shows the 'Sales project 463 : New offer' window. The 'Documents' tab is active, displaying a table of activities:

Name	Node	Recipient	Salesman	Created	Changed	KB	TEST
I tried to move the in		Tanja Tollin	Julie JUB	16.05.2012 13:56:17		109	<input type="checkbox"/>
Cisco Ro-Projector -		Tanja Tollin	Julie JUB	16.05.2012 13:55:30		12	<input type="checkbox"/>
Improvements to pro		Tanja Tollin	Julie JUB	16.05.2012 13:55:58		334	<input type="checkbox"/>

! 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 Tanja 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 screenshot shows the 'Sales project 463 : New offer' window with the 'Details' tab active. It displays order lines for the offer:

No.	Article no.	Description	Unit	Cost price	Sales price	Qty.	Discount	V.A.T.	Result	%	Info 1	Info 2
1	89346723	KM DC 2115	Stk	15000	16500	1	0	24	16500,00	9,09		
2	RT0011235-3	Toner Black	Stk	200	500	1	0	25	500	60		
3	J100	Toner Color	Stk	50	100	1	0	25	100	50		
4	0045789	Maintenance kit	Stk	500	5000	1	0	24	5000	90		

Summary statistics at the bottom:

- Total cost: 15750,00
- Total sales: 22100,00
- Result: 6350,00 (28,73%)

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.

Sales project 456 : Offer COF2000

Sales project: Offer COF2000

Customer no.: 171717

Customer: Truckservice AS

Contact: [Empty]

Reference: [Empty]

Probability: 100% - Accepted

Decision date: 16.05.2012

Sum: 35000,00

Status: Sales project open

Created: janne 16.04.2012 09:53:47

Last changed: janne 17.04.2012 11:12:46

Customer Respond

Approve & Generate

Not Accepted

Activities Documents Details Calculations Notes E-mail Serviceprojects

Name	Node	Recipient	Salesman	Created	Changed
TEST4.doc		Anders Myrvold	Janne	16.04.2012 09:52:34	
TEST4.pdf			Janne	16.04.2012 09:52:43	



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.

Name	Node	Recipient	Salesman	Created	Changed
TEST4.doc		Anders Myrvold	Janne	16.04.2012 09:52:34	
TEST4.pdf			Janne	16.04.2012 09:52:43	

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

#	Article no	Description	Unit	Cost price	Sales price	Qty	Inv	Discount	Stock no	Booking	Maskinnr	VAT	Serial no	Salesman	Hovedg	Undergr	Warrant	Hide
1	89346723	KM DC 2115	Stk	15000	16500	1	<input checked="" type="checkbox"/>			<input type="checkbox"/>		24		GL			<input type="checkbox"/>	<input type="checkbox"/>
2	006RT5621	Batteri	Stk	1000	3500	1	<input checked="" type="checkbox"/>	0		<input type="checkbox"/>		23		GL	TBT	88	<input type="checkbox"/>	<input type="checkbox"/>
3	KM123456	Feeder KM FS 26f	Stk	450	990	1	<input checked="" type="checkbox"/>	20		<input type="checkbox"/>		25		GL			<input type="checkbox"/>	<input type="checkbox"/>

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.

Project: Truckservice AS 1

General Machine Task Solution Check lists Info Contracts Orders Events

Contract type: --- Contract no: Contract valid to: Problem match

Received by: janne Date: 21.05.2012 Time: 10:03 Planned duration: 22.05.2012 09:03 0 Prepaid units: 0

Response time: 8,00 Date: 22.05.2012 Time: 10:03 Service articles: 0

Solution time: 7,00 Date: 22.05.2012 Time: 09:03 Fixed price:

Task codes: INS MAS Priority code: 3

Task status:

Installation of new machine.

Task tree Pre-Order

- Alle
 - Innkomet
 - Evatic Web
 - Email
 - Tildelt
 - Petter
 - Hans
 - Jan
 - Returnert PDA
 - Ferdige
 - Ikke ferdige

Internal info:

Article: 89346723 / KM DC 2115 Qty: 1
 Article: 006RT5621 / Batteri Qty: 1
 Article: KM123456 / Feeder KM FS 2660D Qty: 1
 Article: 25 / Faktureringsavgift Qty: 1



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.

