SERP Introduction Demo - part 3

Welcome back! In the last video, we saw how easy it is to manage your sales pipeline using Standard ERP and looked further into how the powerful document management and calendar features can assist with making your business processes much smoother.

Today, I'm going to show you Standard ERP's workflow management features and how they give you a complete overview of your business processes.

Let's take a look at the Workflow Manager on a Purchase Order with many related activities connected throughout the system.

> **ACTION: Log in as HW. A pop-up window of Task Manager will appear. Open the first activity (task) from the pop-up window. Open linked purchase order No.1032**

Here you can see the "heartbeat" symbol in red, the Workflow Manager, indicating that you have overdue tasks for this Purchase Order.

> **ACTION: Open it by clicking "heartbeat" symbol**

Workflow Manager provides you an overview of all related activities with a status indication.

Red for late activities; green for today's tasks, tick for completed and blank for future tasks.

Workflow Manager provides a graphical overview for activities in Standard ERP helping you manage daily business more efficiently.

Let's now take a look at the Workflow Overview.

> **ACTION: Show the Icon above the Personal Productivity area of the Navigation Centre**

The Workflow Overview is a must have feature for any salesperson. It outlines all opportunities in a single window, giving the salesperson an instant overview.

> **ACTION: click on the Workflow Overview icon**

As we can see here, opportunities are classified based on the stage of the opportunity. We can also see the potential value of all "Sales Ideas".

These classifications are flexible and can be configured in the way management prefers.

I see instantly that there are a couple of quotations that I need to deal with. I also notice, by the 'Green' colour of my 'Workflow Manager' icon, that I need to deal with this quotation today.

Here, I can see the history of all activities, those that are done and those pending. I'll open the last one, - also showing the green colour indicating another activity I should deal with today.
With Standard ERP's integrated communications module, by clicking on the 'Phone' Icon, I can see different methods for contacting this customer, by email or a phone call for example. For now, I will make a call via Skype.

After finishing the call I will record some notes.

Now I will mark this activity as done.

Back to my overview, I have two more color-coded icons for all opportunities requiring my immediate attention.

Those in red are opportunities that are overdue and should have already been completed. Those in yellow are opportunities where the next step has not been specified. Let's open one of those.

This idea was in fact converted successfully into a qualified lead. We can therefore update the Result to converted.

The IDEA has now been transferred to a LEAD and I can open that lead and update some of the fields, - such as Value and Modules; - Modules being those products this specific customer is interested in purchasing.

> **ACTION:** enter 25,000 EUR as value and currency, and enter CRM and Pipeline Management in Modules

Next, I'll create a next step activity to ensure I follow up with the customer.

> **ACTION:** click on "+" and enter an activity with the following Text "Invite customer to view Online Demo" and put the date 2 days from now. Save and close

I can also view all opportunities for a specific Salesperson, or a Sales Group, for a specific time period period, - or track the progress of a specific customer, - all from the same window.

So, with a few simple steps, I was able to get updates on my quotations and follow up on other opportunities, all done using the Workflow Overview, - which enables me to stay on top of all my leads and increase my closing percentage.

Workflow Overview isn't only for managing a sales pipeline. It is a powerful function that can be geared to support the workflow of any department, such as accounts receivable, collections, and so on.

Now that we have seen how useful the Workflow Overview is, let's take a look at other activities in Standard ERP, such as purchase approvals.

> **ACTION:** Log in as SJ

To ensure certain transactions go through the right approval process, Standard ERP offers different options to manage this.

Let's take an example of such a transaction; - a Purchase Order.

Our purchaser, Sam, has created a Purchase Order that needs to be approved.

This is for two Mac Book Pro laptops, and the value is 2,115, which is more than the 1,000 limit set by management.

> **ACTION:** click on Comment tab and show the approval Status

I can see that an approval is required, but has not been requested.
So let's go ahead and do that.

> **ACTION:** click on operation >> Request Approval

Now, as you can see, the status has changed to "Pending".
This was done automatically based on the settings defined for Purchase Order approvals. You have total control over your business processes and the tools in Standard ERP to ensure your company policies are upheld.

Now, I will log in as Audrey, who has been designated as a person with the authority to Approve this Purchase Order.

As soon as AM logs in, the Task Manager will pop up and show all pending approval requests - and there's one of the Purchase Order we just created.

This automatic notification ensures that approvals are processed on time, without the need for constant follow up and extra communication. We can set these approvals to be sent via Email, or even by SMS.

So Audrey will open this activity, and she can see that this is referring to purchase order number 26 with a value of 2,115.

She can now click a button to open the Purchase Order directly from the activity where all the required data is accessible.

She can also open all attachments related to the Purchase Order.

Here, we can even see if there is a Quotation from the supplier, but, as everything seems in order, I don't actually need it at the moment.

So I'll go ahead and approve this.

Standard ERP offers a comprehensive solution for Approvals, - allowing for multi-level approvals, different approval processes, and different approvers with authority dependent up on the value.

We can also configure advanced options. Such as when an employee with approval authority goes on vacation, requests can then be forwarded to another person. The system can also be set up allowing for approvers to be selected from a list.

Now, I'll log in as Sam and open the Purchase Order.

We see the Purchase Order is now OKed and the status is set to approved.

Here is a list of the different processes and transactions for which I can require approval, - covering many of the business processes you may need.

To make it even more efficient, we can set up business alerts for any process in the system, - such as when your server is down, there is a large credit note, a quotation with gross profit exceeding a certain value or is lower than a specified percentage, when a customer places big order, total sales per day, week, and month, and more!

Our consultants can work with you to set up those not already standard in the system - all requiring minimal time.

With Standard ERP, there are many ways to get notified of the events and operations in your business. Using the integrated Business Alerts functionality, you can also notify customers of events related to their account. For example, sending a "Thank You" when a quote has been accepted or an order placed at a certain value. Inform customers when a delivery has been made or for when an invoice is due.

It's all easy to set up in Standard ERP with our consultants standing by should you require assistance.

With Business Alerts, you have real-time information for important events happening in your system.

Inform customers, use preventative measures to avoid problems, and build good relationships with customers through cost-effective CRM tools.

Today, we've reviewed business alerts and workflow management. We've seen the integrated approval workflow in Standard ERP, - allowing for transparency and full control of your business.