Spotlight – SERP – Workflow Overview

Preparation if using demo data attached

1. Import Demo Data

2. Login with
Standard ID: sample@hansaworld.com
Passworld: Sample99

3. Skype Integrations (to be able to make a call via Skype)
When prompted at start select yes to Skype (allow Skype)
If it still doesn't work pls check setting:
Module: User settings > Settings: Local machine > tab: Integrations > Connect to Skype > YES
and then restart the client

4. Update **Connected Workflow Activity** dates:

Ideas Column:
Rockstar International >> Change connected workflow activity to current date

Leads Column:
London Pride Ventures >> Change connected workflow activity to current date

Prospects column:
Business Ventures (London) Limited >> Change connected workflow activity to current date

Quoted column:
Pro Audio Gear >> Change connected workflow activity to current date
BP International >> Change connected workflow activity to current date

5. Updated Skype Name for Calling
Contact Card: 047   Pro Audio Gear
Update the Skype Name to a real Skype Name
Inform the person you will make a quick call which they should answer and then end call
(If the call is not answered the automated activity in Standard ERP will not be created)

SCRIPT:

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

ACTION: Select Workflow Overview

As we can see here, all the opportunities are classified based on the stage of the opportunity. We are able to see the potential value of all the Sales " Leads", "Prospects", "Quotations", and even those "On Ice".

ACTION: In the View field enter 'SALES' then show the column headings with cursor

These headings are configurable to the meet the requirement of the company environment.

Lets look at the "Quoted" column. Here are some quotes that need our attention today, as indicated by the green icon.

ACTION: Move cursor to indicate the 2 green icons under the Quoted Column (these need to be adjusted on day of video recording to be green)

Let's take a look at the first quote.

ACTION: Select the quotation for Pro Audio Gear

From the Green colour of this heartbeat symbol for the Workflow Manager, we can see,

ACTION: Move cursor to Workflow Manager heartbeat

that we need to deal with this quotation today

ACTION: Select Workflow Manager

From here we can see the history of all activities relating to this quote, those done and those pending. We will open the activity with the green icon.

ACTION: Select Activity with Green Icon - (these need to be adjusted on day of video recording to be green)

By selecting the 'Phone' Icon,

ACTION: Select the Phone Icon on the Activity Record

we can see all the possible ways to contact this customer through Standard ERP's communication centre such as email or phone call.

ACTION: Move cursor over possible communication methods

Right now we will make a call via Skype.

> ACTION: Select Skype Button, make sure the call is answered, and hang up the call

After finishing the call we can fill in some notes.

> ACTION: Type in Text field of activity: "HQ will meet next Tuesday to discuss and finalise, sounds positive"

Now let's set this activity as Done.

> ACTION: Select Done and Save Activity

Next lets create a new activity to call the customer again next week to get their feedback.

> ACTION: Select the + sign on the workflow manager, select a date in the following week

We can quickly fill in what to do, then save.

> ACTION: In Text field write "Call Customer and get Feedback on HQ Meeting", and

For this specific activity its a good idea to set Alarm to notify us 10 mins before we are scheduled to make the call.

> ACTION: Select Alarm Tile, Alarm Type Message, in Units type 10

Back to the workflow overview, we have 2 more colour-coded icons for all opportunities needing immediate action. Those in red are opportunities that are overdue, and those is yellow are opportunities where the next step has not been yet specified.

Let's open one of those. This idea was in fact converted successfully into a qualified lead.

> ACTION: Point cursor to second activity under Ideas "Romantic Concert"
> ACTION: Select Activity Romantic Concert >> Key Account, and close it again

We can therefore update the Result to converted.

> ACTION: Drag activity to next column Leads
> (NOTE: drag & drop will only work if the "View" field is filled in, chose "SALES")

As you can see the IDEA has now been transferred as a LEAD, and we can open that lead,

ACTION: Select Activity Romantic Concert

then update fields such as Value and Items; these are the items this specific customer is interested in buying.

ACTION: Type 1300 in Value field, and move cursor to where Items are written in text

Now lets create a next step activity to ensure follow up with the customer.

ACTION: Select Link Manager, select the + sign
ACTION: In Text field write "Invite Customer to visit the showroom", and change the date of the
activity to 2 days in the future
ACTION: Close Activity Record

It is also possible to view all the opportunities for a specific Salesperson,

ACTION: Move cursor to Person field

a Sales Group,

ACTION: Move cursor to Sales Group field

for a specified period,

ACTION: Move cursor to Period field

or for a specific customer,

ACTION: Move cursor to Customer field

all from the same window.

So in a few steps we were able to get updates on quotations and follow up on other opportunities. This was easily done with Standard ERP's powerful Workflow Overview and informative colour coded opportunities, allowing us to stay on top of all our leads and increase the closing percentage.

This feature may be used to support workflows of other departments as well! such as accounts receivables and purchase approvals.

Stay ahead of the competition with this essential tool in Standard ERP- and don't miss out on another opportunity!