



Sales Management Manual

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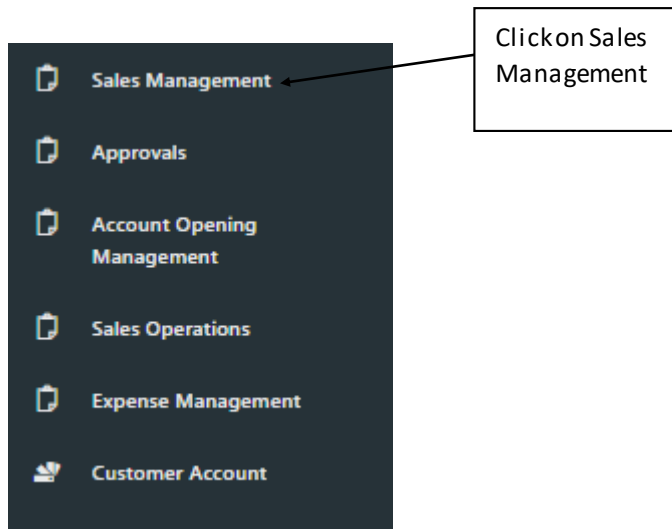
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1.0 Sales Management

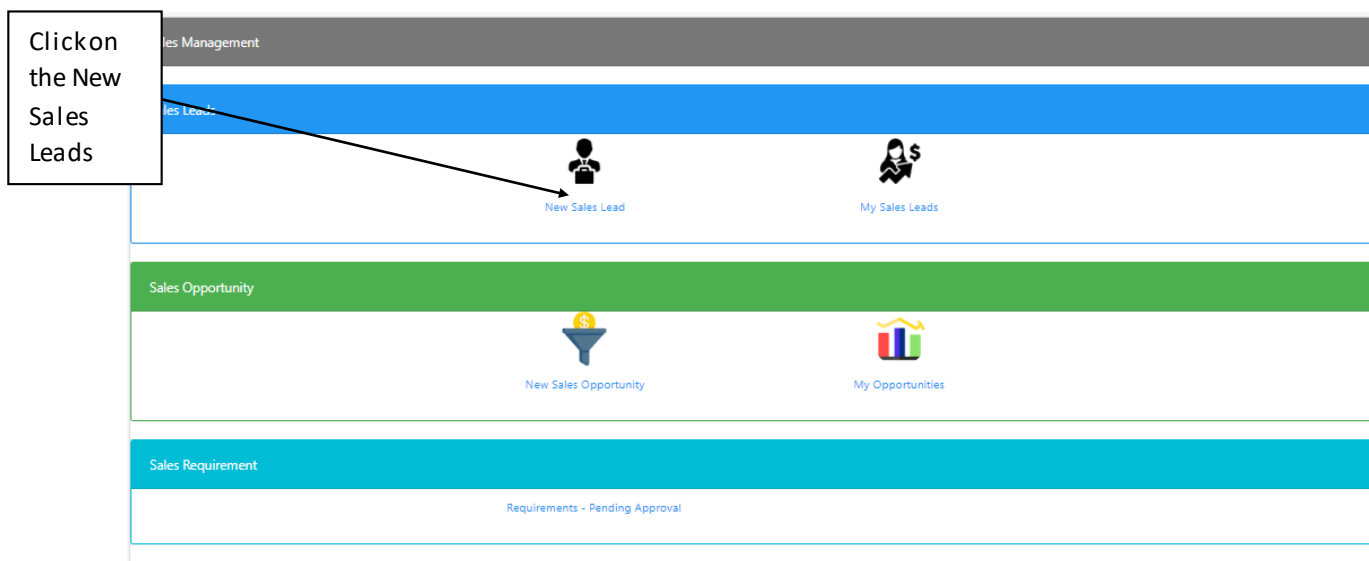
1.1 Create New Sales Leads

Click on Sales Management -> Sales Leads



The system displays the available Sales Management Page that have been setup

Click on the New Sales Leads shown below to create new Sales Leads



Sales Lead - Create
Provide required information

Home / Sales Management / Sales Lead

New Sales Lead

ENTER YOUR INFORMATION

Title :

Name :

Email Address :

Telephone :
+234-999-999-9999

Address :

Narration :

Lead Source :

Upload profile image : [Choose File](#)
Accepted formats: gif, png, jpg. Max file size 2Mb

Activate Windows
Go to Settings to activate Windows

[Submit form](#)

Enter the required information and click on submit

Sales Lead - Create
Provide required information

Home / Sales Management / Sales Lead

New Sales Lead

ENTER YOUR INFORMATION

Title :

Name :

Email Address :

Telephone :
+234-999-999-9999

Address :

Narration :

Lead Source :

Upload profile image : [Choose File](#)
Accepted formats: gif, png, jpg. Max file size 2Mb

[Submit form](#)

Click on
Submit
Form

The system display the data on the data grid as shown below

Sales Leads - List
View Records

Home / Sales / Leads List Actions

Sales Leads Create New Sales Lead

Information - Record added successfully!

Filter: Show: 10

	Name	Designation	Email	Telephone	Last Modified	Status	Actions
	Awolowo	MR	awolowo12@gmail.com	07044545467	2020-07-28	Active	⋮
	Oluwanishola	MR	oluwanishola@gmail.com	07077788881	2020-07-27	Active	⋮
	Mike Adenuga	MR	mikeadenuga12@gmail.com	08052222444	2020-07-28	Active	⋮

1.2 Updating Sales Leads Record

Click on the "Action" icon on the record you want to update

Sales Leads - List
View Records

Home / Sales / Leads List Actions

Sales Leads Create New Sales Lead

Information - Record added successfully!

Filter: Show: 10

	Name	Designation	Email	Telephone	Last Modified	Status	Actions
	Awolowo	MR	awolowo12@gmail.com	07044545467	2020-07-28	Active	⋮
	Oluwanishola	MR	oluwanishola@gmail.com	07077788881	2020-07-27	Active	⋮
	Mike Adenuga	MR	mikeadenuga12@gmail.com	08052222444	2020-07-28	Active	⋮

- View Record
- Edit Record
- Create Sales Opportunity
- Create Corporate Account
- View Opportunities

Click on Edit Record

The system provide you with an update form

Sales Lead - Create

Home / Sales / Sales Lead Support

ENTER YOUR INFORMATION

Title :	MR	Name :	Mike Adenuga
Email Address :	mikeadenuga12@gmail.com	Telephone :	0805222444 +234-999-999-9999
Address	Adenuga close banana island		
Lead Source :	Linked In	Narration	nice
		Upload profile image	No file selected Choose File

Accepted formats: gif, png, jpg. Max file size 2Mb

Submit form

Enter the necessary information and click on Submit Form.

Sales Lead - Create

Home / Sales / Sales Lead Support

ENTER YOUR INFORMATION

Title :	MR	Name :	Mike Adenuga
Email Address :	mikeadenuga12@gmail.com	Telephone :	0805222444 +234-999-999-9999
Address	Adenuga Close Banana Island Lagos Nigeria		
Lead Source :	Linked In	Narration	nice
		Upload profile image	No file selected Choose File

Accepted formats: gif, png, jpg. Max file size 2Mb

Submit form

Click on the Submit Form button

The system shows the updated record on the Sales Leads data grid (shown below)

Sales Leads - List
View Records

Home / Sales / Leads List

Sales Leads Create New Sales Lead

Information - Record updated successfully!

Filter: Show: 10

Name	Designation	Email	Telephone	Last Modified	Status	Actions
Awolowo	MR	awolowo12@gmail.com	07044545467	2020-07-28	Active	
Oluwanishola	MR	oluwanishola@gmail.com	07077788881	2020-07-27	Active	
Mike Adenuga	MR	mikeadenuga12@gmail.com	08052222444	2020-07-28	Active	

1.3 View Sales Leads record details

In order to view the records, click on the icon on the data row that you want to view and click “view records” as shown bellow

View Records

Home / Sales / Leads List

Sales Leads Create New Sales Lead

Information - Record updated successfully!

Filter: Show: 10

Name	Designation	Email	Telephone	Last Modified	Status	Actions
Awolowo	MR	awolowo12@gmail.com	07044545467	2020-07-28	Active	
Oluwanishola	MR	oluwanishola@gmail.com	07077788881	2020-07-27	Active	
Mike Adenuga	MR	mikeadenuga12@gmail.com	08052222444	2020-07-28	Active	

Showing 21 to 23 of 23 entries

Click on the view record

- View Record
- Edit Record
- Create Sales Opportunity
- View/Generate Account
- View Opportunities

Active Windows
Go to Settings to activate Windows.

The system display the view of the record- shown bellow.

You can as well view your Opportunity and also create a new Sales Opportunity through this page shown bellow.

Mike Adenuga

08052222444 | mikeadenuga12@gmail.com

Created On : 7/28/2020 | Status : Active

Activity | Schedule 92 | Profile

Sales Opportunity

You have 0 sales opportunity from this lead

Create New Sales Opportunity

Click to Create New Sales Opportunity

New Sales Opportunity

ENTER YOUR INFORMATION

Create New Customer Account

* Customer Account : -- Please Select --

* Opportunity Type: -- Please Select --

* Transaction Type: -- Please Select --

* Sales Opportunity : Enter Sales Opportunity

* Expected Amount: Enter Sales Expected Amount

* Commencement Date (MM/DD/YYYY): Enter Commencement Date

* Expected Closed Date (MM/DD/YYYY): Enter Expected Closed Date

* Currency : -- Please Select --

Purchase Time Frame: -- Please Select --

Description / Notes : Enter your description or notes here

Activate Windows
Go to Settings to activate Windows.

Back to List | Create Opportunity

Enter the required information and click on the Create Opportunity

0805222444 | mikeadenuga12@gmail.com

Created On : 7/28/2020 | Status : Active

New Sales Opportunity

ENTER YOUR INFORMATION

Create New Customer Account

* Customer Account : DevCoy Limited | * Opportunity Type : Cold Opportunity | * Transaction Type : New Business

* Sales Opportunity : footwears | * Expected Amount : 100,000

* Commencement Date (MM/DD/YYYY) : 07/28/2020 | * Expected Closed Date (MM/DD/YYYY) : 08/04/2020 | * Currency : Naira | Purchase Time Frame : Open

Description / Notes :
Enter your description or notes here

Back to List | Create Opportunity

Click on the Create Opportunity

The system simply indicate that the Customer Account is successfully created this also entails the customer account name as well

TOTAL MESSAGES | TOTAL SALES EXPENSES | CASES | SALES ACTIVITIES

Sales Opportunity Management

-- Select an Action -- | -- Change Sales Opportunity Status --

1 Initiate | 2 Qualify | 3 Quote | 4 Negotiate | 5 Close

Actions

Customer Account

Manage Customer Account - View Account

Customer Account created successfully!

Customer Account Name : DevCoy Limited .

Sales Leads

Sales Opportunity

Previous | Next

Click on Manage Customer Account

The system shows the Account record on the data grid (shown below)

The screenshot shows the 'DevCoy Limited' Customer Account page. The breadcrumb trail is 'Home / Setup / Customer Account'. The main navigation includes 'Activity', 'Schedule' (with a '32' notification), and 'Customer Information'. The 'Sales Opportunity' section features a filter box and a 'Show: 10' dropdown. The data grid below contains the following records:

Opportunity	Type	Expected Start Date	Expected End Date	Expected Amount	Actual Amount	Actual End Date	Status	Actions
footwears	Cold Opportunity	07/28/2020	8/4/2020 12:00:00 AM	100000	0		Pending	⋮
Gas	Warm Opportunity	07/27/2020	8/1/2020 12:00:00 AM	400000	0		Pending	⋮
Gas	Warm Opportunity	07/27/2020	8/1/2020 12:00:00 AM	400000	0		Pending	⋮
Gas	Warm Opportunity	07/27/2020	8/1/2020 12:00:00 AM	400000	0		Pending	⋮
Test Opportunity	Warm Opportunity	07/15/2020	7/31/2020 12:00:00 AM	150000	0		Pending	⋮

Click on the "Action" icon on the record to view Opportunity

This screenshot is identical to the previous one but includes a callout box with the text 'Click on View Opportunity'. An arrow points from this box to the 'View Opportunity' button that appears in the 'Actions' column of the first row (footwears) in the data grid.

Viewing the Opportunity takes you back to Customer Account home page

Sales Opportunity : footwears

Expected Amount : 100,000.00
Customer Account : DevCoy Limited
Expected Close Date : Tuesday, 04 August 2020

Created On : 7/28/2020 | Sales Opportunity Status : Pending | Sales Lead : Mike Adenuga | Sales Opportunity No : S/2020/7/20935397

0 TOTAL MESSAGES

0.00 TOTAL SALES EXPENSES

0 CASES

0 SALES ACTIVITIES

Sales Opportunity Management -- Select an Action -- | -- Change Sales Opportunity Status --

1 Initiate 2 Qualify 3 Quote 4 Negotiate 5 Close

Actions

Customer Account

Sales Leads

Manage Sales Lead - View Account

Sales Lead added successfully to the Sales Opportunity!

Clickon the Manage Sales Leads

This indicate that the Sales Leads was added successfully

Mike Adenuga

0805222444

mikeadenuga12@gmail.com

Created On : 7/28/2020 | Status : Active

Activity | Schedule 32 | Profile

Sales Opportunity

You have created 1 sales opportunity

View Opportunities

Create New Sales Opportunity

Clickon the View Opportunity

The system display the view of the record- shown bellow.

Viewing the Opportunity takes you back to Customer Account home page

The screenshot shows the top navigation bar with contact information: phone number 0805222444, email mikeadenuga12@gmail.com, and status 'Active' created on 7/28/2020. Below this is a 'Sales Opportunities' section. The main content area displays 'Opportunity Topic : footwears' and 'Deal Status : Pending'. Key details include 'Expected Amount : 100,000.00' and 'Expected Closed Date : Tuesday, 04 August 2020'. A callout box with the text 'Clickon the View Opportunity' has an arrow pointing to a green 'View Opportunity' button at the bottom of the card. Other details include 'Account : DevCoy Limited', 'Opportunity Type : Cold Opportunity', 'Currency : Naira', 'Commencement Date : 07/28/2020', and 'Purchase Time-Frame : Open'. A 'View Activities' button is also present.

The system provide you details about the sales Opportunity

It indicate the Sales Opportunity was created successfully, the Total Expected Amount and sales expected close date

The screenshot shows a progress bar with five steps: 1. Initiate, 2. Qualify, 3. Quote, 4. Negotiate, 5. Close. Below the progress bar is an 'Actions' menu. A callout box with the text 'Clickon Sales Opportunity' has an arrow pointing to a green button labeled 'Manage sales opportunity - View Opportunity'. The main content area displays a success message: 'Sale Opportunity created successfully!'. Below this, two green boxes show 'Total Expected Amount : 100000 .' and 'Sales is expected to be closed on 8/4/2020 12:00:00 AM .'. At the bottom right, there is an 'Activate Windows' watermark and a 'Next' button.

The system display the view record of Sales Opportunity - shown below

Sales Opportunity : footwears

Expected Amount : 100,000.00
Customer Account : DevCoy Limited
Expected Close Date : Tuesday, 04 August 2020

Created On : 7/28/2020 | Sales Opportunity Status : Pending

Sale Opportunity Information

Name : footwears	Commencement Date : 07/28/2020
Expected Closed Date : 8/4/2020 12:00:00 AM	Expected Amount : 100000
Opportunity Type : Cold Opportunity	Time-frame : Open
Status : Active	Deal Status : Pending

1.4 Add Sales Requirement

Click on view Sales Requirement ->Add Sales Requirement

0
TOTAL MESSAGES

0.00
TOTAL SALES EXPENSES

0
CASES

0
SALES ACTIVITIES

Sales Opportunity Management -- Select an Action -- | -- Change Sales Opportunity Status --

✓
Initiate

✍️
Qualify

3
Quote

4
Negotiate

Actions

Sales Requirements

View Sales Requirements

Know Your Customer Form is pending submission.

Office Verification is pending submission.

Business Value Proposition
Activate Windows

The letters in red in the grid indicate that the customer Requirement form is still on pending submission

Click on view Sales Requirement

Once you click on the View Sales Requirement system display the view of the record- shown below.

Under Know Your Customer Form and office verification click on Submit Requirement

The screenshot displays a sales opportunity page for 'footwears'. At the top, there are three callouts: 'Expected Amount : 100,000.00', 'Customer Account :', and 'Expected Close Date : Tuesday, 04 August 2020'. Below these, the page status is shown as 'Created On : 7/28/2020 | Sales Opportunity Status : Pending | Sales Lead : Mike Adenuga | Sales Opportunity No : 5/2020/7/20935397'. The main section is titled 'Sales Requirements' and contains two requirement cards. The first card is for 'Know Your Customer Form' with a status of 'Pending Submission' and 'Is Mandatory : Yes'. The second card is for 'Office Verification' with a status of 'Pending Submission' and 'Is Mandatory : No'. To the right of each card is a 'Submit Requirement' button. A callout box on the right side of the page points to these buttons with the text 'Click on the submit Requirement'.

Enter the necessary information and click on the Submit Feedback->Know Your Customer Account

The screenshot shows the 'Update' form for a sales requirement. The header is 'Sales Opportunity : footwears' with callouts for 'Expected Amount : 100,000.00', 'Customer Account : DevCoy Limited', and 'Expected Close Date : Tuesday, 04 August 2020'. The page status is 'Created On : 7/28/2020 | Sales Opportunity Status : Pending | Sales Lead : Mike Adenuga | Sales Opportunity No : 5/2020/7/20935397'. The section is titled 'Sales Requirements - Update' and includes a sub-header 'ENTER YOUR INFORMATION'. The requirement 'Know Your Customer Form' is selected. Below it is a text area for '* Outcome/Feedback :' containing the text 'TEST'. There is an 'Upload Image/Document' section with a 'Choose File' button. At the bottom right, there are two buttons: 'Back to List' and 'Submit Feedback'. A callout box on the right side of the page points to the 'Submit Feedback' button with the text 'Click on the Submit Feedback'.

Enter the necessary information and click on the Submit Feedback->Office Verification

Sales Opportunity : footwears

Expected Amount : 100,000.00
Customer Account : DevCoy Limited
Expected Close Date : Tuesday, 04 August 2020

Created On : 7/28/2020 | Sales Opportunity Status : Pending | Sales Lead : Mike Adenuga | Sales Opportunity No : S/2020/7/20935397

Sales Requirements - Update

ENTER YOUR INFORMATION

Requirement :

Office Verification

*** Outcome/Feedback :**

TEST

Upload Image/Document

No file selected Choose File

[Back to List](#)
[Submit Feedback](#)

Click on the Submit Feedback

The system display the Sales Requirement record which indicate result pending -shown below.

Opportunity : footwears

Expected Amount : 100,000.00
Customer Account :
Expected Close Date : Tuesday, 04 August 2020

Created On : 7/28/2020 | Sales Opportunity Status : Pending | Sales Lead : Mike Adenuga | Sales Opportunity No : S/2020/7/20935397

Sales Requirements [Back to Sales Qualification](#)

<p>Requirement :</p> <p>Know Your Customer Form</p> <p style="text-align: center;">Status : Pending Approval Is Mandatory : Yes</p>	Result : Pending
<p>Requirement :</p> <p>Office Verification</p> <p style="text-align: center;">Status : Pending Approval Is Mandatory : No</p>	Result : Pending

Click on back to Sales Qualification

1.5 Business Value Proposition

Click on the Business Sales value Proposition ->Create Sales value proposition

The screenshot displays the 'Sales Opportunity Management' interface. At the top, there are two dropdown menus: '-- Select an Action --' and '-- Change Sales Opportunity Status --'. Below these is a progress bar with five steps: 1. Initiate (checked), 2. Qualify, 3. Quote, 4. Negotiate, and 5. Close. A blue 'Actions' bar is visible, containing several menu items: 'Sales Requirements', 'Business Value Proposition', 'Decision Makers', and 'Competitor Management'. The 'Business Value Proposition' item is highlighted in green and contains a red button labeled 'Create Sales Value-Proposition'. A red error message states: 'Sales Business value proposition has not been created.' At the bottom right, there is a watermark for 'Activate Windows' and a 'Next' button.

Click on
view Sales
value
proposition

Once you click on the Sales value proposition display the view of the record- shown below.

The screenshot shows the 'Sales Opportunity : footwears' record view. The header is blue and contains three fields: 'Expected Amount :', 'Customer Account : DevCoy Limited', and 'Expected Close Date :'. Below the header, it displays 'Created On : 7/28/2020 | Sales Opportunity Status : Pending | Sales Lead : Mike Adenuga | Sales Opportunity No :'. The main section is titled 'Value Proposition' and contains a form with the heading 'ENTER YOUR INFORMATION'. A red asterisk indicates a required field: '* Enter value proposition to the client :'. Below this is a text area with the placeholder 'Enter your Value Proposition here'. At the bottom, there are two buttons: 'Back to List' and 'Proceed'.

Click on the
proceed

Enter the necessary information and click on proceed

Sales Opportunity : footwears

Expected Amount : Customer Account : DevCoy Limited Expected Close Date :

Created On : 7/28/2020 | Sales Opportunity Status : Pending | Sales Lead : Mike Adenuga | Sales Opportunity No :

Value Proposition

ENTER YOUR INFORMATION

* Enter value proposition to the client :

presentation

Back to List Proceed

Click on proceed

Click on add Document to proceed

Sales Opportunity : footwears

Expected Amount : 100000 Customer Account : Expected Close Date : 8/4/2020 12:00:00 AM

Created On : 7/28/2020 | Sales Opportunity Status : Pending | Sales Lead : Mike Adenuga | Sales Opportunity No : 5/2020/7/20935397

Value Proposition - Documentation

Sales Value Proposition : presentation

SUBMIT OFFERS/QUOTATIONS/PRESENTATION SLIDES

Add Document

Click on add document

Sales Opportunity : footwears

Expected Amount : 100000 |
 Customer Account : DevCoy Limited |
 Expected Close Date : 8/4/2020 12:00:00 AM

Created On : 7/28/2020 |
 Sales Opportunity Status : Pending |
 Sales Lead : Mike Adenuga |
 Sales Opportunity No : 5/2020/7/20935397

Value Proposition - Documentation

Sales Value Proposition : presentation

SUBMIT OFFERS/QUOTATIONS/PRESENTATION SLIDES

Document Title

file

Upload Image/Document

GNXG3809.JPG Choose File

Back to List Save Document

Click on save document

Enter the necessary information and click on save document

The system indicate the Sales value proposition document as been added –as it is shown below

Sales Opportunity : footwears

Expected Amount : 100000 |
 Customer Account : |
 Expected Close Date : 8/4/2020 12:00:00 AM

Created On : 7/28/2020 |
 Sales Opportunity Status : Pending |
 Sales Lead : Mike Adenuga |
 Sales Opportunity No : 5/2020/7/20935397

Value Proposition - Documentation Back to Sales Qualification

Sales Value Proposition : Update

presentation

ADD MORE DOCUMENTS

Add Document

VIEW SUBMITTED DOCUMENTS

gallery

Click on back to sales requirement

Document added successfully

1.6 Decision Makers

Click on the Decision Makers ->Add Decision Maker

The system displays the Sales Opportunity Management Page that have been setup

Click on the Add Decision Makers shown below to create new Decision Makers

The screenshot displays the 'Sales Opportunity Management' interface. At the top, there is a header with the title 'Sales Opportunity Management' and two dropdown menus: '-- Select an Action --' and '-- Change Sales Opportunity Status --'. Below the header is a progress bar with five steps: 1. Initiate (checked), 2. Qualify (active), 3. Quote, 4. Negotiate, and 5. Close. A blue 'Actions' bar is positioned below the progress bar. The main content area is divided into several sections: 'Sales Requirements', 'Business Value Proposition', and 'Decision Makers'. The 'Decision Makers' section contains a red button labeled 'View Decision Makers - 0' and two green buttons: 'Add Decision Makers' and 'Select Existing Decision Makers'. A callout box points to the 'Add Decision Makers' button with the text 'Click on Add Decision Makers'. Another callout box points to the 'Select Existing Decision Makers' button with the text 'You can also select from the existing Decision Makers while you click on select existing Decision Makers'. At the bottom of the page, there is a 'Competitor Management' section and an 'Activate Windows' watermark.

Sales Opportunity : Footwears

Expected Amount : 100000
Customer Account : DevCoy Limited
Expected Close Date : 8/4/2020 12:00:00 AM

Created On : 7/28/2020 | Sales Opportunity Status : Pending | Sales Lead : Mike Adenuga | Sales Opportunity No : 5/2020/7/20935397

Sales Opportunity - Decision Makers

ENTER YOUR INFORMATION

* Title :

* Full Name:

* Role :

* Designation/Position :

Email :

* Contact Phone :

Date of Birth (MM/DD/YYYY) :

Description :

Activate Windows
Go to Settings to activate Windows.

Back to List
Submit

Enter the necessary information and click on Submit button

Sales Opportunity : Footwears

Expected Amount : 100000
Customer Account : DevCoy Limited
Expected Close Date : 8/4/2020 12:00:00 AM

Created On : 7/28/2020 | Sales Opportunity Status : Pending | Sales Lead : Mike Adenuga | Sales Opportunity No : 5/2020/7/20935397

Sales Opportunity - Decision Makers

ENTER YOUR INFORMATION

* Title :

* Full Name:

* Role :

* Designation/Position :

Email :

* Contact Phone :

Date of Birth (MM/DD/YYYY) :

Description :

Activate Windows
Go to Settings to activate Windows.

Back to List
Submit

Click on the Submit button

The system display that the Decision Maker is successfully added as shown below

The screenshot shows a five-step process flow: 1. Initiate (checked), 2. Qualify (active), 3. Quote, 4. Negotiate, and 5. Close. Below the flow is an 'Actions' menu with several options: Sales Requirements, Business Value Proposition, Decision Makers, View Decision Makers - 1 (highlighted in red), Add Decision Makers, Select Existing Decision Makers, and Competitor Management. A notification states 'Aiyegbusi Yomi added as Decision Maker'.

Clickon View Decision Makers

Then the system provide you details about the Decision Maker

To create New Sales Activities click on Create New Sales Activities button shown below

The screenshot displays an 'Opportunity : footwears' page. Key information includes: Expected Amount: 100000, Customer Account: DevCoy Limited, and Expected Close Date: 8/4/2020 12:00:00 AM. The page lists 'Sales Decision Makers' with a 'Back to Sales Qualification' button. The decision maker details for 'Barr. Aiyegbusi Yomi' are shown, including email, phone, date of birth, and role. At the bottom, there are buttons for 'Create New Sales Activities' and 'View Sales Activities'.

Clickon back to Sales Qualification

1.7 Competitor Management

Click on the Competitor Management-> create Competitor Management

The system provides you where you can create competitor information and enter the necessary information needed.

The screenshot displays the 'Sales Opportunity Management' interface. At the top, there is a progress bar with five steps: 'Initiate' (checked), 'Qualify' (selected), 'Quote', 'Negotiate', and 'Close'. Below the progress bar is an 'Actions' menu. The main content area is divided into several sections: 'Sales Requirements', 'Business Value Proposition', 'Decision Makers', and 'Competitor Management'. Under the 'Competitor Management' section, there is a green button labeled 'Create Competitor Information' and a red message box stating 'There are no competitor information for this sales opportunity.' A callout box on the left points to the 'Create Competitor Information' button with the text 'Click on create competitor information'. At the bottom right, there is a watermark for 'Activate Windows' and a 'Next' button.

Enter the necessary information and click on Submit button

Sales Opportunity : footwears

Expected Amount : 100000 |
 Customer Account : DevCoy Limited |
 Expected Close Date : 8/4/2020 12:00:00 AM

Created On : 7/28/2020 |
 Sales Opportunity Status : Pending |
 Sales Lead : Mike Adenuga |
 Sales Opportunity No :

Sales Opportunity - Competitor Information

ENTER YOUR INFORMATION

* Competitor : -- Please Select -- New Competitor | * Year: Enter Year under review

Stake(%) : Enter Stake (%) | Stake - Revenue Amount : Enter Stake - Amount controlled by the Competitor

Description : Enter your description here

[Back to List](#) | [Submit](#)

Click on submit button

To create New Sales competitor click on Create New Sales competitor button shown bellow

Opportunity : footwears

Expected Amount : 100000 |
 Customer Account : DevCoy Limited |
 Expected Close Date : 8/4/2020 12:00:00 AM

Created On : 7/28/2020 |
 Sales Opportunity Status : Pending |
 Sales Lead : Mike Adenuga

Sales - Competitor Information

[Back to Sales Qualification](#) | [Create New Competitor Information](#)

Competitor : Slot Limited

✓	Year : 2018	Stake (%) : 60	Stake Amount : 450000
---	-------------	----------------	-----------------------

[Create New Sales competitor](#) | [View Sales Competitors](#)

Click on back to Sales Qualification

1.8 Quotes Management

Click on the Quotes Management-> create New Product Quote

The system provides you where you can create New Product Quote and enter the necessary information needed.

Created On : 7/28/2020 | Sales Opportunity Status : Pending | Sales Lead : Mike Adenuga | Sales Opportunity No : S/2020/7/20935397

0 TOTAL MESSAGES | 0.00 TOTAL SALES EXPENSES | 0 CASES | 0 SALES ACTIVITIES

Sales Opportunity Management

-- Select an Action -- | -- Change Sales Opportunity Status --

Initiate | Qualify | Quote | Negotiate | Close

Quote: Management

Create New Product Quote

Create New Service Quote

Activate Windows
Go to Settings to activate Windows.

Next

Previous

A callout box on the left contains the text "Click on create New Product" with an arrow pointing to the "Create New Product Quote" button.

Sales Opportunity : footwears

Customer Account : DevCoy Limited | Quote No : Q/2020/7/M910KCABK

New Sales Quote

ENTER YOUR INFORMATION

* Due Date (MM/DD/YYYY) : Quotation Type :

Back | Initiate Quote

Enter the necessary information and click on Initiate Quote

Sales Opportunity : footwears

Customer Account : DevCoy Limited Quote No : Q/2020/7/M910KCABK

New Sales Quote

ENTER YOUR INFORMATION

* Due Date (MM/DD/YYYY) : 08/04/2020 Quotation Type : Price Based

Back Initiate Quote

Clickon
Initiate
Quote
button
after
entering
the
data

Then system provide you a page where you are to enter your Price, Product and Quantity

Sales Opportunity : footwears

Customer Account : DevCoy Limited Quote No : Q/2020/7/M910KCABK

New Sales Quote

ENTER YOUR INFORMATION

* Product : -- Please Select -- Unit Price : Enter Price * Quantity : Enter Quantity * Amount : Enter Amount

* Applied Discount : Final Amount:

Add New Item

Enter the necessary information and click on Add New Item

Sales Opportunity : footwears

Customer Account : DevCoy Limited Quote No : Q/2020/7/M910KCABK

New Sales Quote

ENTER YOUR INFORMATION

* Product : Apple Mac Air Unit Price : 150000 * Quantity : 2 * Amount : 300000

* Applied Discount : 0 Final Amount: 300000.00

Add New Item

Clickon
Add New
item

The system provide you details on Product Quote Items you requested for then you can click on complete once you are done

The screenshot shows a table with the following data:

Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
Apple Mac Air	150,000.00	2	300,000.00	0.00	300,000.00	[Details] [Update] [Remove]

Below the table, there is a summary bar: Sub-Total Amount : 300,000.00 Tax : 15,000.00 Total Amount : 315,000.00. At the bottom right, a green bar contains a 'Complete' button, which is highlighted by a callout box with the text 'Clickon Complete button'.

1.9 Requesting for Product Quote Approval

In order to request for Approval click on Manage Product Quote then the system provide you a data in the grid as shown bellow click on the "Action"

The screenshot shows a dashboard with several widgets: '0 TOTAL MESSAGES', '0.00 TOTAL SALES EXPENSES', '0 CASES', and 'SALES AC'. Below these is a 'Sales Opportunity Management' section with a progress bar showing stages: Initiate (checked), Qualify (checked), Quote (active), Negotiate (4), and Close (5). A callout box points to a 'Manage Product Quote' button in the 'Quotes Management' section. Below this, there is a 'Create New Service Quote' button and a summary box with the following data: Quote Number : Q/2020/7/2XGH6E2NL, Amount : 315,000.00, Status : Pending.

The system displays the data on the grid as shown below

Opportunity : footwears

Expected Amount : 100,000.00
Customer Account : DevCoy Limited
Expected Close Date : Tuesday, 04 August 2020

Created On : 7/30/2020 | Sales Opportunity Status : Pending

Sales Quote Back to Sales Qualification

Filter: Show: 10

Customer Account	Sales Opportunity	Sales Quote Number	Total Amount	Tax	Final Amount	Status	Actions
DevCoy Limited	footwears	Q/2020/7/2XGH6E2NL	300,000.00	15,000.00	315,000.00	Pending	<ul style="list-style-type: none"> View Record Request for Approval Request for Discount

Showing 1 to 1 of 1 entries

Click on Request for Approval

Then system indicate that your Product Quote Approval have been sent successfully.

But still showing pending Approval down below which need to be approved by a Junior Role Officer

Opportunity : footwears

Expected Amount : 100,000.00
Customer Account : DevCoy Limited
Expected Close Date : Tuesday, 04 August 2020

Created On : 7/30/2020 | Sales Opportunity Status : Pending

Sales Quote Back to Sales Qualification

✓ Information - Quote sent for approval successfully!

Filter: Show: 10

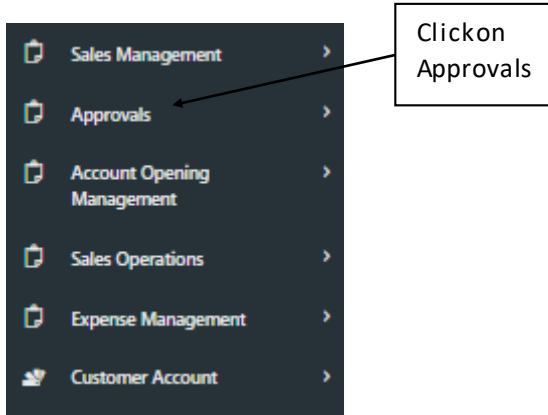
Customer Account	Sales Opportunity	Sales Quote Number	Total Amount	Tax	Final Amount	Status	Actions
DevCoy Limited	footwears	Q/2020/7/2XGH6E2NL	300,000.00	15,000.00	315,000.00	Pending Approval - Junior Approval Role	

2.0 View Product Quote record details

In order to view the records, click on the "Action" icon on the data row that you want to view and click "view records" as shown below

2.1 Product Quotation Approval Pending list

Click on Approval-> Pending Approval



Junior Approval Role->click on "Action" icon in the grid in order to approve pending Sales Quote

A screenshot of a grid titled 'Submission & Approvals'. The grid is organized into sections, each with a colored header bar. The sections and their contents are as follows:

Submission & Approvals	
Sales Submission	
Pending Submission	
Sales Requirement Approvals	
Pending Approval	Approved Requirement
Product Quotation Approval	
Pending Approval	Approved Quotation
Service Quotation Approval	
Pending Approval	Approved Quotation
Product Discount Approval	
Pending Approval	Approved Discount
Service Discount Approval	

A callout box with the text 'Clickon Pending Approval' has an arrow pointing to the 'Pending Approval' entry in the 'Product Quotation Approval' section. A watermark 'Activate Windows' is visible in the bottom right corner of the screenshot.

Then the system displays the data on the grid as shown below

Sales Quotes Approval - Pending List
View Records

Home / Transaction / Sales Quotes

Sales Quotation Approval - Pending

Filter: Show: 10

Transaction Date	Due Date	Sales Quote Number	Total Amount	Tax	Final Amount	Status	Actions
2020-07-21	07/22/2020	Q/2020/7/10ZBHQQLW	150,000.00	7,500.00	157,500.00	Pending	
7/27/2020	08/01/2020	Q/2020/7/61QK6XDHK	0.00	0.00	0.00	Pending	
7/27/2020	08/01/2020	Q/2020/7/C1F0JBPAJ	0.00	0.00	0.00	Pending	
7/29/2020	08/04/2020	Q/2020/7/M910KCAK	300,000.00	15,000.00	315,000.00	Pending	
7/30/2020	08/04/2020	Q/2020/7/2XGH6E2NL	300,000.00	15,000.00	315,000.00	Pending	

Showing 1 to 5 of 5 entries

View Record | Approve Record

Click on Approve Record

Enter the necessary Approval information then you click on the Approve down below

Sales Quotation - View Details


VIEW INFORMATION

Customer Number : C/2020/7/QB0EY339I Customer Name : DevCoy Limited Sale Opportunity No : S/2020/7/13682933 Sale Opportunity : footwears

Quote No : Q/2020/7/2XGH6E2NL Sub-Total : 300,000.00 Tax : 15,000.00 Total Amount : 315,000.00

QUOTE ITEMS

Filter: Show: 10

	Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
	Apple Mac Air	150,000.00	2	300,000.00	0.00	300,000.00	Details Update Remove

Showing 1 to 1 of 1 entries

Approval Information

* Approval Type : -- Please Select --

Comments :
Enter your description or notes here

[Back to Pending Approval List](#) [Approve](#)

Activate Windows
Go to Settings to activate Windows.

Click on the Approve button after entering the necessary details as it shown below


Sales Quotation - View Details

VIEW INFORMATION

Customer Number : C/2020/7/Q05EV339I	Customer Name : DevCoy Limited	Sale Opportunity No : S/2020/7/13682933	Sale Opportunity : footwears
Quote No : Q/2020/7/2IGH6E2NL	Sub-Total : 300,000.00	Tax : 15,000.00	Total Amount : 315,000.00

QUOTE ITEMS

Filter: Show: 10

Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
 Apple Mac Air	150,000.00	2	300,000.00	0.00	300,000.00	[Details] [Update] [Remove]

Showing 1 to 1 of 1 entries

Approval Information

* Approval Type :
Approved

Comments :
TEST

[Back to Pending Approval List](#) [Approve](#)

Click on the Approve button

Activate Windows
Go to Settings to activate Windows.

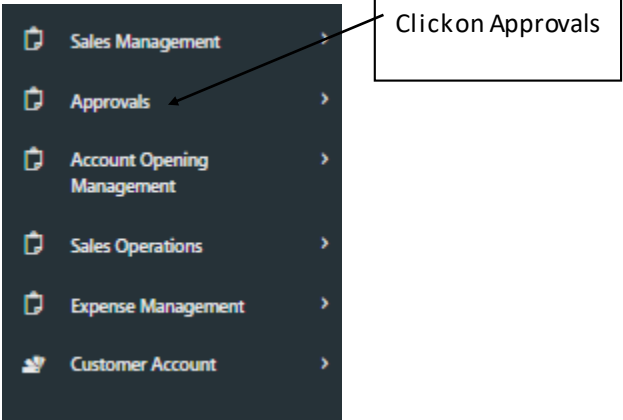
Then system provide you Sales Opportunity list which indicate pending and Sales won opportunity

Sales Opportunity List

Filter: Show: 10

Customer Account	Opportunity No	Opportunity	Type	Expected Start Date	Expected End Date	Expected Amount	Actual End Date	Actual Amount	Status	Actions
DevCoy Limited	S/2020/7/06208279	Test Opportunity	Warm Opportunity	07/15/2020	7/31/2020 12:00:00 AM	150000		0	Pending	
DevCoy Limited	S/2020/7/24232466	Gas	Warm Opportunity	07/27/2020	8/1/2020 12:00:00 AM	400000		0	Pending	
DevCoy Limited	S/2020/7/95732261	Gas	Warm Opportunity	07/27/2020	8/1/2020 12:00:00 AM	400000		0	Pending	
DevCoy Limited	S/2020/7/69552823	Gas	Warm Opportunity	07/27/2020	8/1/2020 12:00:00 AM	400000		0	Pending	
DevCoy Limited	S/2020/7/20935397	footwears	Cold Opportunity	07/28/2020	8/4/2020 12:00:00 AM	100000		0	Pending	
DevCoy Limited	S/2020/7/13682933	footwears	Cold Opportunity	07/28/2020	8/4/2020 12:00:00 AM	100000	08/02/2020	315000	Sales Won	
DevCoy Limited	S/2020/8/29730169	footwears	Cold Opportunity	08/01/2020	8/4/2020 12:00:00 AM	300000	08/02/2020	0	Sales Won	

2.2 Junior Approval Role 2



The system provides you submission and Approvals data then you click on Pending Approval under product Quotation Approval

A screenshot of a grid titled 'Submission & Approvals'. The grid is divided into several sections, each with a colored header. A white box with the text 'Clickon Pending Approval' has an arrow pointing to the 'Pending Approval' link in the 'Product Quotation Approval' section.

Submission & Approvals	
Sales Submission	
Pending Submission	
Sales Requirement Approvals	
Pending Approval	Approved Requirement
Product Quotation Approval	
Pending Approval	Approved Quotation
Service Quotation Approval	
Pending Approval	Approved Quotation
Product Discount Approval	
Pending Approval	Approved Discount
Service Discount Approval	

Then the system displays the data on the grid click on "Action" icon to Approve Sales Quotation as shown below

Sales Quotes Approval - Pending List
View Records

Home / Transaction / Sales Quotes

Sales Quotation Approval - Pending

Filter:

Transaction Date	Due Date	Sales Quote Number	Total Amount	Tax	Final Amount	Status	Actions
2020-07-22	07/22/2020	Q/2020/7/F14WZ081Y	750,000.00	37,500.00	787,500.00	Pending	View Record Approve Record
7/30/2020	08/04/2020	Q/2020/7/2XGH6E2NL	300,000.00	15,000.00	315,000.00	Pending	View Record Approve Record

Showing 1 to 2 of 2 entries

Click on Approve Record

Enter the necessary Approval information then you click on the Approve button down below


Sales Quotation - View Details

VIEW INFORMATION

Customer Number : C/2020/7/0E0EY339J	Customer Name : DevCoy Limited	Sale Opportunity No : S/2020/7/13682933	Sale Opportunity : footwears
Quote No : Q/2020/7/2XGH6E2NL	Sub-Total : 300,000.00	Tax : 15,000.00	Total Amount : 315,000.00

QUOTE ITEMS

Filter: Show: 10

Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
 Apple Mac Air	150,000.00	2	300,000.00	0.00	300,000.00	[Details] [Update] [Remove]

Showing 1 to 1 of 1 entries

Approval Information

* Approval Type :
-- Please Select --

Comments :
Enter your description or notes here

Back to Pending Approval List Approve

Activate Windows
Go to Settings to activate Windows.

Click on the Approve button after entering the necessary details as it shown below

Sales Quotation - View Details


VIEW INFORMATION

Customer Number : C/2020/7/QB0EY339J Customer Name : DevCoy Limited Sale Opportunity No : S/2020/7/13682933 Sale Opportunity : footwear

Quote No : Q/2020/7/2XGH6E2NL Sub-Total : 300,000.00 Tax : 15,000.00 Total Amount : 315,000.00

QUOTE ITEMS

Filter: Show: 10

Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
 Apple Mac Air	150,000.00	2	300,000.00	0.00	300,000.00	[Details] [Update] [Remove]

Showing 1 to 1 of 1 entries

Approval Information

Approval Type : Approved

Comments : TEST

Back to Pending Approval List Approve

Activate Windows
Go to Settings to activate Windows.

Click on the approve button

Opportunity : footwear

Expected Amount : 100,000.00 Customer Account : DevCoy Limited Expected Close Date : Tuesday, 04 August 2020

Created On : 7/30/2020 | Sales Opportunity Status : Pending

Sales Quote Back to Sales Qualification

Filter: Show: 10

Customer Account	Sales Opportunity	Sales Quote Number	Total Amount	Tax	Final Amount	Status	Actions
DevCoy Limited	footwear	Q/2020/7/2XGH6E2NL	300,000.00	15,000.00	315,000.00	Pending Approval - Junior Approval Role	[View Record] [Request for Discount]

Showing 1 to 1 of 1 entries

Click on View Record

Then system provide you every Sales Quotation details shown below

Sales Quotation - View Details


VIEW INFORMATION

Customer Number : C/2020/7/Q0EY339J	Customer Name : DevCoy Limited	Sale Opportunity No : 5/2020/7/13682933	Sale Opportunity : footwears
Quote No : Q/2020/7/2XGH6E2NL	Sub-Total : 300,000.00	Tax : 15,000.00	Total Amount : 315,000.00

QUOTE ITEMS

Filter:

Show: 10

	Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
	Apple Mac Air	150,000.00	2	300,000.00	0.00	300,000.00	Details Update Remove

Showing 1 to 1 of 1 entries

1

Approval Information

* Approval Type :
-- Please Select --

Comments :

Enter your description or notes here

[Back to Pending Approval List](#)

[Approve](#)

Activate Windows
Go to Settings to activate Windows.

Sales Quotation - Details

View information

Home / Transaction / Sales Quotation

Actions

Quote

[Back to Sales Qualification](#)

[Back to Product Quotation](#)

[Save](#)

[Print](#)




2259 Elba Lane
Paris, France
888-555-2311

Invoice To:

DevCoy Limited
Nigeria
08043535345
se@well.com

Invoice : Q/2020/7/2XGH6E2NL

Date: Thursday, 30 July 2020
Due date: Tuesday, 04 August 2020

	Product Name	Price	Quantity	Amount	Discount	Final Amount
	Apple Mac Air	150,000.00	2	300,000.00	0.00	300,000.00

Authorized person

Total due

Subtotal:	300,000.00
Tax:	15,000.00
Total:	315,000.00

Activate Windows
Go to Settings to activate Windows.

2.3 Quotes Management

2.4 Create Service Quote

Click on the Quote Management->Create New Service Quote

The system displays the Sales Management Page that have been setup

Click on the Create New Service Quote shown below to create new Service Quote

Sales Opportunity Management

-- Select an Action -- -- Change Sales Opportunity Status --

1 Initiate 2 Qualify 3 Quote 4 Negotiate 5 Close

Quotes Management

Manage Product Quote View Product Quote

Create New Service Quote

Quote Number : Q/2020/7/M910KCABK
Amount : 315,000.00
Status : Pending

Previous Next

Enter the necessary information and click on Initiate Quote

Sales Opportunity : footwears

Customer Account : DevCoy Limited Quote No : Q_2020_7_XNZK3B3KA

New Sales Quote

ENTER YOUR INFORMATION

* Due Date (MM/DD/YYYY) :

08/07/2020

Back Initiate Quote

Clickon initiate

The system provides you where you can create New Service Quote and enter the necessary information needed.

Sales Opportunity : footwears

Customer Account : DevCoy Limited Quote No : Q_2020_7_XNZK3B3KA

New Sales Quote

ENTER YOUR INFORMATION

Service : -- Please Select --	* Quote Type : -- Please Select --	* Applied Discount : 0	Final Amount: 0.00
Labour Description : Enter your description here	* Hours/Days : Enter Hour/Day	Rate : 0	* Amount : 0

[Add New Item](#)

Enter the required information and click on the Add New Item button shown below

Sales Opportunity : footwears

Customer Account : DevCoy Limited Quote No : Q_2020_7_XNZK3B3KA

New Sales Quote

ENTER YOUR INFORMATION

Service : Corporate Deep Cleaning Services	* Quote Type : Labour	* Applied Discount : 0	Final Amount: 160000.00
Labour Description : Enter your description here	* Hours/Days : 8	Rate : 20,000	* Amount : 160000

[Add New Item](#)

Click on Add New Item

The system provide you details on Service Quote Items you requested for shown then you can click on complete once you are done

LABOUR

Filter: Show: 10

Service	Labour Description	Hours/Days	Rate	Amount	Discount	Final Amount	Actions
Corporate Deep Cleaning Services		8	20,000.00	160,000.00	0.00	160,000.00	Details Remove

Showing 1 to 1 of 1 entries

MATERIALS

Filter: Show: 10

Service	Material Description	Quantity	Price per unit	Amount	Discount	Total Amount	Actions
No data available in table							

Showing 0 to 0 of 0 entries

SUBMIT QUOTATION

Sub-Total Amount : 160,000.00 Tax : 8,000.00 Total Amount : 168,000.00

Complete

Click on complete button

2.4 Requesting for Service Quote Approval

In order to request for Approval click on Manage Service Quote then the system provide you a data in the grid as shown bellow click on the "Action"

Sales Quotes Approval - Pending List

Home / Transaction / Sales Quotes

Sales Quotation Approval - Pending

Filter: Show: 10

Transaction Date	Due Date	Sales Quote Number	Total Amount	Tax	Final Amount	Status	Actions
7/29/2020	08/07/2020	Q_2020_7_XNIZK3B3KA	160,000.00	8,000.00	168,000.00	Pending	View Record Approve Record

Showing 1 to 1 of 1 entries

Click on the Approve Record

Sales Quotation - View Details

VIEW INFORMATION

Customer Number : C/2020/7/QE0EY339J	Customer Name : DevCoy Limited	Sale Opportunity No : S/2020/7/20935397	Sale Opportunity : footwears
Quote No : Q_2020_7_JN2K383KA	Sub-Total : 160,000.00	Tax : 8,000.00	Total Amount : 0.00

QUOTE ITEMS

Filter: Show:

Service Name	Price	Quantity	Amount	Discount	Final Amount	Actions
Corporate Deep Cleaning Services	20,000.00	8	160,000.00	0.00	0.00	[Details] [Update] [Remove]

Showing 1 to 1 of 1 entries

Approval Information

* Approval Type :
-- Please Select --

Comments :
Enter your description or notes here

Back to Pending Approval List Approve

Activate Windows
Go to Settings to activate Windows.

Enter the necessary Approve information then click on the Approve button down below

Sales Quotation - View Details

VIEW INFORMATION

Customer Number : C/2020/7/QE0EY339J	Customer Name : DevCoy Limited	Sale Opportunity No : S/2020/7/20935397	Sale Opportunity : footwears
Quote No : Q_2020_7_JN2K383KA	Sub-Total : 160,000.00	Tax : 8,000.00	Total Amount : 0.00

QUOTE ITEMS

Filter: Show:

Service Name	Price	Quantity	Amount	Discount	Final Amount	Actions
Corporate Deep Cleaning Services	20,000.00	8	160,000.00	0.00	0.00	[Details] [Update] [Remove]

Showing 1 to 1 of 1 entries

Approval Information

* Approval Type :
-- Please Select --

Comments :
TEST

Back to Pending Approval List Approve

Click on the Approve Button

Activate Windows
Go to Settings to activate Windows.

2.5 Negotiation Management

Click on Create New Product or Service Negotiation in order negotiate

The screenshot shows the 'Sales Opportunity Management' interface. At the top, there are four status bars: '0 TOTAL MESSAGES', '0.00 TOTAL SALES EXPENSES', '0 CASES', and '0 SALES ACTIVITIES'. Below these is a progress bar with five steps: 'Initiate', 'Qualify', 'Quote', 'Negotiate', and 'Close'. The 'Negotiate' step is currently active. Below the progress bar, there are two buttons: 'Create New Product Negotiation' and 'Create New Service Negotiation'. A callout box on the left points to the 'Create New Product Negotiation' button with the text 'Click on Create New Product Negotiation'.

The screenshot shows the 'Sales Opportunity : footwears' form. At the top, there are three tabs: 'Customer Account : DevCoy Limited', 'Expected Amount : 100000', and 'Expected Close Date : 8/4/2020 12:00:00 AM'. Below these, it says 'Created On : 7/28/2020 | Sales Opportunity Status : Pending'. The main section is titled 'Sales Negotiation - Update' and contains the following fields:

- Quote Number : Q/2020/7/M910KCBK Amount : 315,000.00
- * Negotiation Date (MM/DD/YYYY): Enter Scheduled Date
- Negotiated Amount: Enter Negotiated Amount
- Negotiated Outcome: -- Please Select --
- Feedback: Enter your Feedback here
- Attendees: Enter your Attendees here

At the bottom right, there are two buttons: 'Back to List' and 'Submit Feedback'.

Enter the required information and click on Submit Feedback

Sales Opportunity : footwears

Customer Account : DevCoy Limited
Expected Amount : 100000
Expected Close Date : 8/4/2020 12:00:00 AM

Created On : 7/28/2020 | Sales Opportunity Status : Pending

Sales Negotiation - Update

ENTER YOUR INFORMATION

Quote Number : Q/2020/7/M910KCABK Amount : 315,000.00

* Negotiation Date (MM/DD/YYYY) : Negotiated Amount : Negotiated Outcome :

Feedback : Attendees :

[Back to List](#)
[Submit Feedback](#)

The system display the data on the data grid as shown below

Sales Quotation - Details

Home / Transaction / Sales Quotation


[Back to Sales Opportunity](#)
[Request for more Discount](#)

VIEW INFORMATION

Customer Number : C/2020/7/QB0EY339J	Customer Name : DevCoy Limited	Sale Opportunity No : S/2020/7/20935397	Sale Opportunity : footwears
Quote No : Q/2020/7/M910KCABK	Sub-Total : 300,000.00	Tax : 15,000.00	Total Amount : 315,000.00

QUOTE ITEMS

Filter: Show: 10

	Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
	Apple Mac Air	150,000.00	2	300,000.00	0.00	300,000.00	 Details Update Remove

Showing 1 to 1 of 1 entries

[Back to Sales Opportunity](#)

Clickon
Request for
More
Discount

Enter the necessary information and click on Submit Discount Request down below

Sales Quotation - Discount Request
View information

Home / Transaction / Sales Quotation

Sales Discount Request

VIEW INFORMATION

Customer Number : C/2020/7/Q60EY339J	Customer Name : DevCoy Limited	Sale Opportunity No : S/2020/7/20935397	Sale Opportunity : footwears
Quote No : Q/2020/7/M910XCABK	Sub-Total : 100,000.00	Tax : 15,000.00	Total Amount : 315,000.00

ENTER YOUR INFORMATION

* Requested Discount (%):
50000

Reason :
test

Back [icon] Submit Discount Request [icon]

Clickon
Submit
Discount
Request

The system indicate that the Request for Discount on Product Negotiation was added successfully

Sales Opportunity : footwears

Expected Amount : 100,000.00 | Customer Account : DevCoy Limited | Expected Close Date : Tuesday, 04 August 2020

Created On : 7/28/2020 | Sales Opportunity Status : Pending | Sales Lead : Mike Adenuga | Sales Opportunity No : S/2020/7/20935397

0 TOTAL MESSAGES | 0.00 TOTAL SALES EXPENSES | 0 CASES | 0 SALES ACTIVITIES

Sales Opportunity Management

Information - Request for further discount added successfully!

Initiate | Qualify | Quote | Negotiate | Close

Quotes Management

Manage Product Negotiation

Create New Service Negotiation

Date : 08/01/2020 Amount : 5,000.00 Outcome : Negotiation Completed

Clickon
Create New
Service
Negotiation

Activate Windows
Go to Settings to activate Windows.

Sales Opportunity : footwears

Customer Account : DevCoy Limited
Expected Amount : 100000
Expected Close Date : 8/4/2020 12:00:00 AM

Created On : 7/28/2020 | Sales Opportunity Status : Pending

Sales Negotiation - Update

ENTER YOUR INFORMATION

Quote Number : Q_2020_7_XNZK3B3KA Amount : 0.00

* Negotiation Date (MM/DD/YYYY) :
 Negotiated Amount :
 Negotiated Outcome :

Feedback :
 Attendees :

[Back to List](#)
[Submit Feedback](#)

Enter the required information and click on Submit Feedback

Sales Opportunity : footwears

Customer Account : DevCoy Limited
Expected Amount : 100000
Expected Close Date : 8/4/2020 12:00:00 AM

Created On : 7/28/2020 | Sales Opportunity Status : Pending

Sales Negotiation - Update

ENTER YOUR INFORMATION

Quote Number : Q_2020_7_XNZK3B3KA Amount : 0.00

* Negotiation Date (MM/DD/YYYY) :
 Negotiated Amount :
 Negotiated Outcome :

Feedback :
 Attendees :

[Back to List](#)
[Submit Feedback](#)

Click on the Submit Feedback button

The system indicate that the Request for Discount on Service Negotiation was added successfully down below

Sales Opportunity : footwears

Expected Amount : 100,000.00 |
 Customer Account : DevCoy Limited |
 Expected Close Date : Tuesday, 04 August 2020

Created On : 7/28/2020 |
 Sales Opportunity Status : Pending |
 Sales Lead : Mike Aderuga |
 Sales Opportunity No : 5/2020/7/20935397

0 TOTAL MESSAGES

0.00
TOTAL SALES EXPENSES

0
CASES

0
SALES ACTIVITIES

Sales Opportunity Management

-- Select an Action -- |
 -- Change Sales Opportunity Status --

Initiate
Qualify
Quote
Negotiate
Close

Quotes Management

Manage Product Negotiation

Manage Service Negotiation

Date : 08/01/2020 Amount : 5,000.00 Outcome : Negotiation Completed

Date : 08/01/2020 Amount : 5,000.00 Outcome : Negotiation Completed

Activate Windows
 Go to Settings to activate Windows.

2.6 Sales Closure

Click on Sales Closure in order to close sales

Sales Opportunity : footwears

Expected Amount : 100,000.00 |
 Customer Account : DevCoy Limited |
 Expected Close Date : Tuesday, 04 August 2020

Created On : 7/28/2020 |
 Sales Opportunity Status : Pending |
 Sales Lead : Mike Aderuga |
 Sales Opportunity No : 5/2020/7/20935397

0 TOTAL MESSAGES

0.00
TOTAL SALES EXPENSES

0
CASES

0
SALES ACTIVITIES

Sales Opportunity Management

-- Select an Action -- |
 -- Change Sales Opportunity Status --

Initiate
Qualify
Quote
Negotiate
Close

Sales Closure

Quote Number : Q/2020/7/M910KCABK
 Amount : 315,000.00

Quote Number : Q_2020_7_XNZK3B3KA
 Amount : 168,000.00

Close Sales

Activate Windows
 Go to Settings to activate Windows.

Click on
Close Sales

The system provide you a page where you are to enter necessary information on Sales Closure shown below

The screenshot shows a web interface for 'Sales Opportunity : footwears'. At the top, there are three buttons: 'Expected Amount : 100,000.00', 'Customer Account : footwears', and 'Expected Close Date : Tuesday, 04 August 2020'. Below these, it says 'Created On : 7/28/2020 | Sales Opportunity Status : Pending | Sales Lead : Mike Adenuga | Sales Opportunity No : 5/2020/7/20935397'. The main section is titled 'Sales Closure' and has a 'Back to Sales Qualification' button. Under 'ENTER YOUR INFORMATION', there are several fields: '* Closure Status:' with a dropdown menu showing '-- Please Select --'; '* Actual Closed Date (MM/DD/YYYY):' with a date picker showing 'Enter Sales Closure Date'; 'Reference Number:' with a text input 'Enter Reference No'; 'Name of Competitor lost to:' with a text input 'Name of the competitor'; and 'Lost Reason Comments:' with a text area 'Enter your description or notes here'. At the bottom right, there are two buttons: 'Back to List' and 'Close Sales'.

Enter the necessary information and click on the Close Sales button

This screenshot is identical to the previous one, but the form fields are now filled. The '* Closure Status:' dropdown is set to 'Sales Won'. The '* Actual Closed Date (MM/DD/YYYY):' date picker shows '08/01/2020'. The 'Reference Number:' text input contains 'LKJHHQ'. A callout box with a black border and white background is positioned on the right side, containing the text 'Clickon the Close Sales button' with an arrow pointing to the 'Close Sales' button at the bottom right of the form.

Then system provide that the sales as been close and it indicate Sales Won in the grid down below

Customer Account	Opportunity No	Opportunity	Type	Expected Start Date	Expected End Date	Expected Amount	Actual End Date	Actual Amount	Status	Actions
DevCoy Limited	5/2020/7/06208279	Test Opportunity	Warm Opportunity	07/15/2020	7/31/2020 12:00:00 AM	150000		0	Pending	
DevCoy Limited	5/2020/7/24232466	Gas	Warm Opportunity	07/27/2020	8/1/2020 12:00:00 AM	400000		0	Pending	
DevCoy Limited	5/2020/7/95732261	Gas	Warm Opportunity	07/27/2020	8/1/2020 12:00:00 AM	400000		0	Pending	
DevCoy Limited	5/2020/7/69532623	Gas	Warm Opportunity	07/27/2020	8/1/2020 12:00:00 AM	400000		0	Pending	
DevCoy Limited	5/2020/7/2093397	footwears	Cold Opportunity	07/28/2020	8/4/2020 12:00:00 AM	100000		0	Pending	
DevCoy Limited	5/2020/7/13682933	footwears	Cold Opportunity	07/28/2020	8/4/2020 12:00:00 AM	100000	08/02/2020	100000	Sales Won	
DevCoy Limited	5/2020/8/29730169	footwears	Cold Opportunity	08/01/2020	8/4/2020 12:00:00	300000	08/02/2020	0	Sales Won	

2.7 Sales Approval level 2

Create Sales Opportunity

Enter the necessary information and click on create opportunity

New Sales Opportunity

ENTER YOUR INFORMATION

[Create New Customer Account](#)

* Customer Account: * Opportunity Type: * Transaction Type:

* Sales Opportunity: * Expected Amount:

* Commencement Date (MM/DD/YYYY): * Expected Closed Date (MM/DD/YYYY): * Currency: Purchase Time Frame:

Description / Notes:

[Back to List](#) [Create Opportunity](#)

Click on Create opportunity

Then we proceed to Sales Quote in order to brief us on how to approve

Sales Opportunity : Gas

Customer Account : Teste Nigeria Limited

Quote No : Q/2020/8/W8MBB1XMK

New Sales Quote

ENTER YOUR INFORMATION

* Due Date (MM/DD/YYYY) : 08/04/2020

Quotation Type : Amount Based

Back

Initiate Quote

Click on Initiate Quote after entering the data

The system provide you a page where you can choose Product, Quote Item and Quantity

Sales Opportunity : Gas

Customer Account : Teste Nigeria Limited

Quote No : Q/2020/8/W8MBB1XMK

New Sales Quote

ENTER YOUR INFORMATION

* Product : -- Please Select --

Quote Item : Enter Quote Item

Quantity : Enter Quantity

* Price : Enter Amount

* Amount : Enter Amount

Description : Enter your description here

* Applied Discount : Enter Amount

Final Amount : Enter Amount

Add New Item

Enter the required information and click on the Add New Item button down below

Sales Opportunity : Gas

Customer Account : Teste Nigeria Limited

Quote No : Q/2020/8/69M283AMZ

New Sales Quote

ENTER YOUR INFORMATION

* Product : -- Please Select --

Quote Item : black

Quantity : 4

* Price : 100.000

* Amount : Enter Amount

Description : Enter your description here

* Applied Discount : 0

Final Amount : 400000.00

Add New Item

Click on the Add New Item button

Then the system indicate that item have been added successfully shown below

[Add New Item](#)

ITEMS

Filter: Show: 10

	Product Name	Quote Item	Item Description	Quantity	Price	Amount	Discount	Final Amount	Actions
	Apple Mac Air	black		4	100000	400000	0	400000	Details Remove

1 entries

Sub-Total Amount : 400,000.00 Tax : 20,000.00 Total Amount : 420,000.00

[Back to Sale Opportunity](#) [View Quote](#)

Click on back to Sales Opportunity

2.8 Sales Negotiation Update

Enter the necessary information and click on the Submit feedback button

Sales Opportunity : Gas

Customer Account : Teste Nigeria Limited | Expected Amount : 350000 | Expected Close Date : 8/4/2020 12:00:00 AM

Created On : 8/2/2020 | Sales Opportunity Status : Pending

Sales Negotiation - Update

ENTER YOUR INFORMATION

Quote Number : Q/2020/B/W8MBB1XMK Amount : 735,000.00

* Negotiation Date (MM/DD/YYYY) : 08/01/2020 | Negotiated Amount : 400000 | Negotiated Outcome : Negotiation Completed

Feedback : | Attendees :

[Back to List](#) [Submit Feedback](#)

Click on submit feedback

The system provide you the Sales Quotation details click on Send for Approve shown below

2.9 Approval Stage Officer 1

The system provide you a grid where you can click on the "Action" to approve the Sales Quotation

Sales Quotes Approval - Pending List
View Records

Home / Transaction / Sales Quotes

Sales Quotation Approval - Pending

Filter: Show: 10

Transaction Date	Due Date	Sales Quote Number	Total Amount	Tax	Final Amount	Status	Actions
2020-07-21	07/22/2020	Q/2020/7/10ZBHQQLW	150,000.00	7,500.00	157,500.00	Pending	View Record Approve Record
8/2/2020	08/04/2020	Q/2020/8/V8M8B1XMK	700,000.00	35,000.00	735,000.00	Pending	View Record Approve Record
8/3/2020	08/04/2020	Q/2020/8/69M283AMZ	400,000.00	20,000.00	420,000.00	Pending	View Record Approve Record

Showing 1 to 3 of 3 entries

Sales Quotation - View Details

VIEW INFORMATION

Customer Number : C/2020/7/FA1189JKU
Customer Name : Teste Nigeria Limited
Sale Opportunity No : S/2020/8/68005773
Sale Opportunity : Gas
Quote No : Q/2020/8/69M283AMZ
Sub-Total : 400,000.00
Tax : 20,000.00
Total Amount : 420,000.00

QUOTE ITEMS

Filter: Show: 10

Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
Apple Mac Air	100,000.00	4	400,000.00	0.00	400,000.00	[Details] [Update] [Remove]

Showing 1 to 1 of 1 entries

Approval Information

* Approval Type :
-- Please Select --

Comments :
Enter your description or notes here

Back to Pending Approval List Approve

Enter the required information the click on approve button down below

Sales Quotation - View Details

VIEW INFORMATION

Customer Number : C/2020/7/FA1JBRJK	Customer Name : Teste Nigeria Limited	Sale Opportunity No : S/2020/8/68005773	Sale Opportunity : Gas
Quote No : Q/2020/8/69M283AMZ	Sub-Total : 400,000.00	Tax : 20,000.00	Total Amount : 420,000.00

QUOTE ITEMS

Filter: Show: 10

	Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
	Apple Mac Air	100,000.00	4	400,000.00	0.00	400,000.00	Details Update Remove

Showing 1 to 1 of 1 entries

Approval Information

* Approval Type :
Approved

Comments :
test

[Back to Pending Approval List](#) [Approve](#) **++**

Click on the Approve button

Activate Windows
Go to Settings to activate Windows.

3.0 Sales Opportunity Approval 2

Create new Product or Service Quote->click on new Service Quote

Expected Amount : 400,001.00 | Customer Account : DevCoy Limited | Expected Close Date : Tuesday, 04 August 2020

Created On : 8/3/2020 | Sales Opportunity Status : Pending | Sales Lead : | Sales Opportunity No : S/2020/8/89380848

0 TOTAL MESSAGES | 0.00 TOTAL SALES EXPENSES | 0 CASES | 0 SALES ACTIVITIES

Sales Opportunity Management

-- Select an Action -- | -- Change Sales Opportunity Status --

Initiate | Qualify | Quote | Negotiate | Close

Click on Create New Service Quote

Quotes Management

[Create New Product Quote](#)

[Create New Service Quote](#)

Previous | Next

Sales Opportunity : Gas

Customer Account : DevCoy Limited Quote No : Q_2020_8_AYNLP0084

New Sales Quote

ENTER YOUR INFORMATION

* Due Date (MM/DD/YYYY) :

Enter Scheduled Date

Initiate Quote

Enter the necessary information then click on Initiate Quote

Sales Opportunity : Gas

Customer Account : DevCoy Limited Quote No : Q_2020_8_AYNLP0084

New Sales Quote

ENTER YOUR INFORMATION

* Due Date (MM/DD/YYYY) :

08/04/2020

Initiate Quote

Click on the Initiate Quote button

Then the system provide you where you are to add the necessary information shown down below

Sales Opportunity : Gas

Customer Account : DevCoy Limited Quote No : Q_2020_8_AYNLP0084

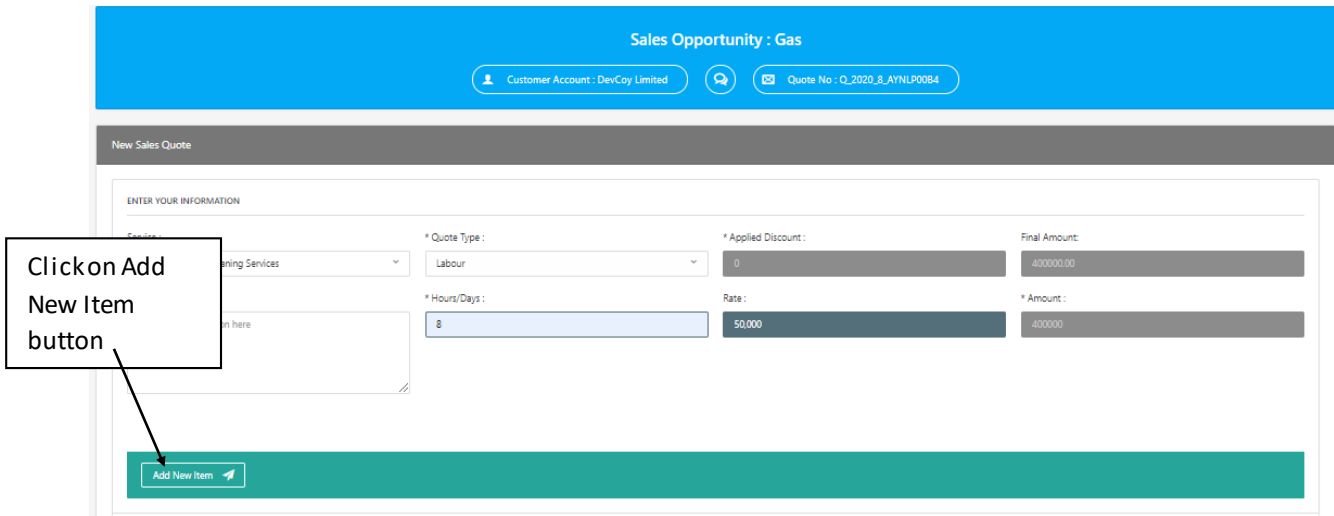
New Sales Quote

ENTER YOUR INFORMATION

Service : -- Please Select --	* Quote Type : -- Please Select --	* Applied Discount : Enter Rate	Final Amount : Enter Amount
Labour Description : Enter your description here	* Hours/Days : Enter Hour/Day	Rate : Enter Rate	* Amount : Enter Amount
Description : Enter your description here	* Quantity : Enter Quantity	Price per unit : Enter Rate	* Amount : Enter Amount

Add New Item

Enter the required information and click on Add New Item



The system provide you a grid where you can click on the “Action” to view Service Quotation details shown below

LABOUR

Filter:

Show:

Service	Labour Description	Hours/Days	Rate	Amount	Discount	Final Amount	Actions
Corporate Deep Cleaning Services		8	50,000.00	400,000.00	0.00	400,000.00	[Details] [Remove]

Showing 1 to 1 of 1 entries

1

3.1 Quote Management

Create New Service Negotiation

0 TOTAL MESSAGES

0.00 TOTAL SALES EXPENSES

0 CASES

0 SALES ACTIVITIES

Sales Opportunity Management

-- Select an Action --

-- Change Sales Opportunity Status --

Initiate

Qualify

Quote

Negotiate

Close

Quotes Management

ES Create New Product Negotiation

ES Create New Service Negotiation

Previous

Next

Click on
Create New
Service

The system provide Sales Negotiation-update form enter the necessary information and Submit

Sales Opportunity : Gas

Customer Account : DevCoy Limited

Expected Amount : 400001

Expected Close Date : 8/4/2020 12:00:00 AM

Created On : 8/3/2020 | Sales Opportunity Status : Pending

Sales Negotiation - Update

ENTER YOUR INFORMATION

Quote Number : Q_2020_8_AINLP0084 Amount : 0.00

* Negotiation Date (MM/DD/YYYY) :

Negotiated Amount :

Negotiated Outcome :

Feedback :

Attendees :

Back to List

Submit Feedback

Enter the necessary information and click on Submit Feedback

Sales Opportunity : Gas

[Customer Account : DevCoy Limited](#) |
 [Expected Amount : 400001](#) |
 [Expected Close Date : 8/4/2020 12:00:00 AM](#)

Created On : 8/3/2020 | Sales Opportunity Status : Pending

Sales Negotiation - Update

ENTER YOUR INFORMATION

Quote Number : Q_2020_8_AYNLP0084 Amount : 0.00

* Negotiation Date (MM/DD/YYYY) : |
 Negotiated Amount : |
 Negotiated Outcome :

Feedback :

Attendees :

[Back to List](#) |
 [Submit Feedback](#)

Click on the Submit Feedback button

The system provide you Sales Quotation-details click on the Send for Approval button shown below

Sales Quotation - Details

Home / Transaction / Sales Quotation

Actions

Sales Quotation - View Details

[Back to Sales Opportunity](#) |
 [Request for more Discount](#) |
 [Send for Approval](#)

VIEW INFORMATION

Customer Number : C/2020/7/QEDV339J	Customer Name : DevCoy Limited	Sale Opportunity No : S/2020/8/89380848	Sale Opportunity : Gas
Quote No : Q_2020_8_AYNLP0084	Sub-Total : 400,000.00	Tax : 20,000.00	Total Amount : 420,000.00

LABOUR ITEMS

Filter: Show: 10

Service	Labour Description	Hours/Days	Rate	Amount	Discount	Final Amount	Actions
Corporate Deep Cleaning Services		8	50,000.00	400,000.00	0.00	400,000.00	[Details] [Update] [Remove]

Showing 1 to 1 of 1 entries

Click on the Send for Approval button

The system provide you Sales Quote Approval-pending list click on the "Action" icon in order to approve down below

Sales Quotes Approval - Pending List
View Records

Home / Transaction / Sales Quotes

Sales Quotation Approval - Pending

Filter:

Transaction Date	Due Date	Sales Quote Number	Total Amount	Tax	Final Amount	Status	Actions
8/3/2020	08/04/2020	Q_2020_8_AYNL0084	400,000.00	20,000.00	420,000.00	Pending	View Record Approve Record

Showing 1 to 1 of 1 entries

Click on the Approve Record

Enter the necessary information on Sale Quotation-view details may be sales won or lost then click on Approve shown down below

Sales Quotation - View Details

VIEW INFORMATION

Customer Number : C/2020/7/QED0E1339J	Customer Name : DevCoy Limited	Sale Opportunity No : 5/2020/8/89380848	Sale Opportunity : Gas
Quote No : Q_2020_8_AYNL0084	Sub-Total : 400,000.00	Tax : 20,000.00	Total Amount : 0.00

QUOTE ITEMS

Filter:

Service Name	Price	Quantity	Amount	Discount	Final Amount	Actions
Corporate Deep Cleaning Services	50,000.00	8	400,000.00	0.00	0.00	[Details] [Update] [Remove]

Showing 1 to 1 of 1 entries

Approval Information

* Approval Type :
Approved

Comments :
test

Click on the Approve button

Back to Pending Approval List [\[Back\]](#) [\[Approve\]](#)

Activate Windows
Go to Settings to activate Windows.

3.2 Sales Opportunity Management

Click on Sales closure ->Close Sales

The screenshot displays the Sales Opportunity Management interface. At the top, there are four status bars: 'TOTAL MESSAGES' (0), 'TOTAL SALES EXPENSES' (0.00), 'CASES' (0), and 'SALES ACTIVITIES' (0). Below these is a 'Sales Opportunity Management' header with two dropdown menus: '-- Select an Action --' and '-- Change Sales Opportunity Status --'. A process flow is shown with five steps: 'Initiate', 'Qualify', 'Quote', 'Negotiate', and 'Close'. The 'Close' step is highlighted with a pencil icon. Below the flow is a 'Sales Closure' form. The form contains the following information: 'Quote Number : Q_2020_8_AYNLP0084' and 'Amount : 420,000.00'. A red button labeled 'Close Sales' is visible. At the bottom right of the form, there are 'Previous' and 'Submit form' buttons. A callout box on the left says 'Click on Close Sales' with an arrow pointing to the 'Close Sales' button.

The system provide you Sales Closure form

The screenshot shows the 'Sales Closure' form with a blue header. The header contains the following information: 'Sales Opportunity : Gas', 'Expected Amount : 400,001.00', 'Customer Account : Gas', and 'Expected Close Date : Tuesday, 04 August 2020'. Below the header, there is a 'Sales Closure' section with a 'Back to Sales Qualification' button. The form is divided into two columns. The left column has the following fields: '* Closure Status:' with a dropdown menu showing '-- Please Select --'; '* Actual Closed Date (MM/DD/YYYY):' with a calendar icon and a text input field labeled 'Enter Sales Closure Date'; and 'Name of Competitor lost to:' with a text input field labeled 'Name of the competitor'. The right column has the following fields: 'Reference Number:' with a text input field labeled 'Enter Reference No'; and 'Lost Reason Comments:' with a text area labeled 'Enter your description or notes here'. At the bottom right of the form, there are 'Back to List' and 'Close Sales' buttons.

Enter the necessary information then click on Close Sales

Sales Opportunity : Gas

Expected Amount : 400,001.00 |
 Customer Account : Gas |
 Expected Close Date : Tuesday, 04 August 2020

Created On : 8/3/2020 |
 Sales Opportunity Status : Pending |
 Sales Lead : |
 Sales Opportunity No : 5/2020/8/89380848

Sales Closure Back to Sales Qualification

ENTER YOUR INFORMATION

* Closure Status:

* Actual Closed Date (MM/DD/YYYY) : Reference Number :

Back to List |
 Close Sales

Then the system provide you Sales Opportunity grids which indicate that the Sales Opportunity as been won

Filter: Show: 10

Customer Account	Opportunity No	Opportunity	Type	Expected Start Date	Expected End Date	Expected Amount	Actual End Date	Actual Amount	Status	Actions
DevCoy Limited	5/2020/7/06208279	Test Opportunity	Warm Opportunity	07/15/2020	7/31/2020 12:00:00 AM	150000		0	Pending	
DevCoy Limited	5/2020/7/24232466	Gas	Warm Opportunity	07/27/2020	8/1/2020 12:00:00 AM	400000		0	Pending	
DevCoy Limited	5/2020/7/95732261	Gas	Warm Opportunity	07/27/2020	8/1/2020 12:00:00 AM	400000		0	Pending	
DevCoy Limited	5/2020/7/69552623	Gas	Warm Opportunity	07/27/2020	8/1/2020 12:00:00 AM	400000		0	Pending	
DevCoy Limited	5/2020/7/20995397	footwears	Cold Opportunity	07/28/2020	8/4/2020 12:00:00 AM	100000		0	Pending	
DevCoy Limited	5/2020/7/13682933	footwears	Cold Opportunity	07/28/2020	8/4/2020 12:00:00 AM	100000	08/02/2020	315000	Sales Won	
DevCoy Limited	5/2020/8/29730169	footwears	Cold Opportunity	08/01/2020	8/4/2020 12:00:00 AM	300000	08/02/2020	0	Sales Won	
DevCoy Limited	5/2020/8/89380848	Gas	Warm Opportunity	08/01/2020	8/4/2020 12:00:00 AM	400001	08/03/2020	420000	Sales Won	

Showing 1 to 8 of 8 entries (filtered from 109 total entries)

Click on the Close Sales button

3.3 Sales Opportunity Approval

Create Sales Opportunity

Enter the necessary information New Sales Opportunity

The screenshot shows the 'New Sales Opportunity' form with the following fields and values:

- Customer Account:** -- Please Select --
- Opportunity Type:** -- Please Select --
- Transaction Type:** -- Please Select --
- Sales Opportunity:** Enter Sales Opportunity
- Expected Amount:** Enter Sales Expected Amount
- Commencement Date (MM/DD/YYYY):** Enter Commencement Date
- Expected Closed Date (MM/DD/YYYY):** Enter Expected Closed Date
- Currency:** -- Please Select --
- Purchase Time Frame:** -- Please Select --
- Description / Notes:** Enter your description or notes here

Buttons at the bottom right: [Back to List](#) and [Create Opportunity](#) (+)

Enter the required information and click on the Create Opportunity

The screenshot shows the 'New Sales Opportunity' form with the following fields and values:

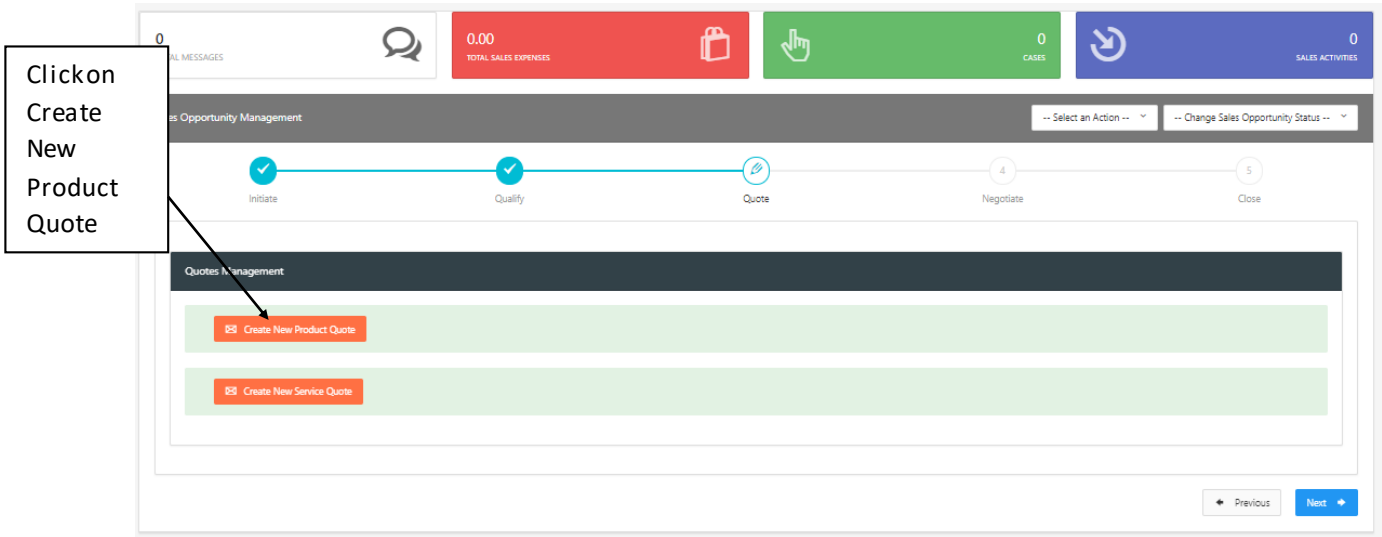
- Customer Account:** Billux Nigeria Limited
- Opportunity Type:** Hot Opportunity
- Transaction Type:** New Business
- Sales Opportunity:** footwear
- Expected Amount:** 630,000
- Commencement Date (MM/DD/YYYY):** 08/01/2020
- Expected Closed Date (MM/DD/YYYY):** 08/04/2020
- Currency:** Naira
- Purchase Time Frame:** Immediate
- Description / Notes:** Enter your description or notes here

Buttons at the bottom right: [Back to List](#) and [Create Opportunity](#) (+)

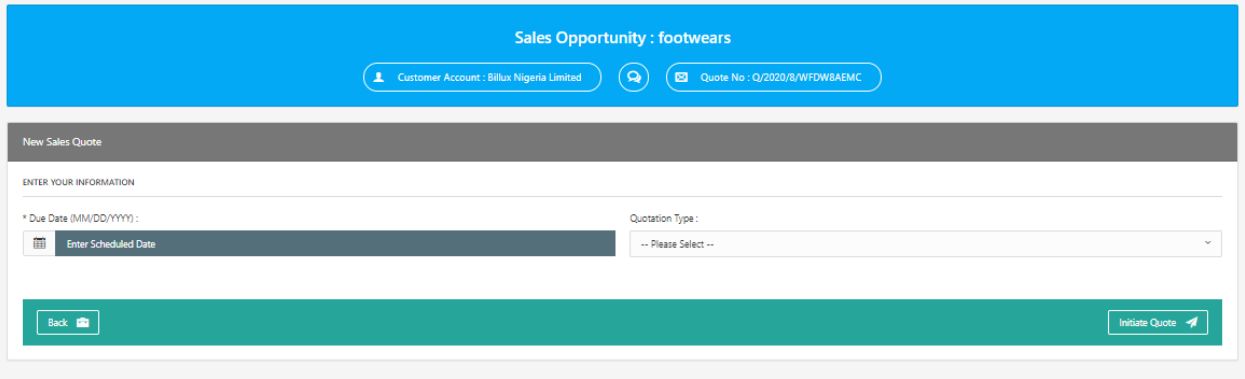
Callout box: Click on the create Opportunity after entering data

3.4 Quote Management

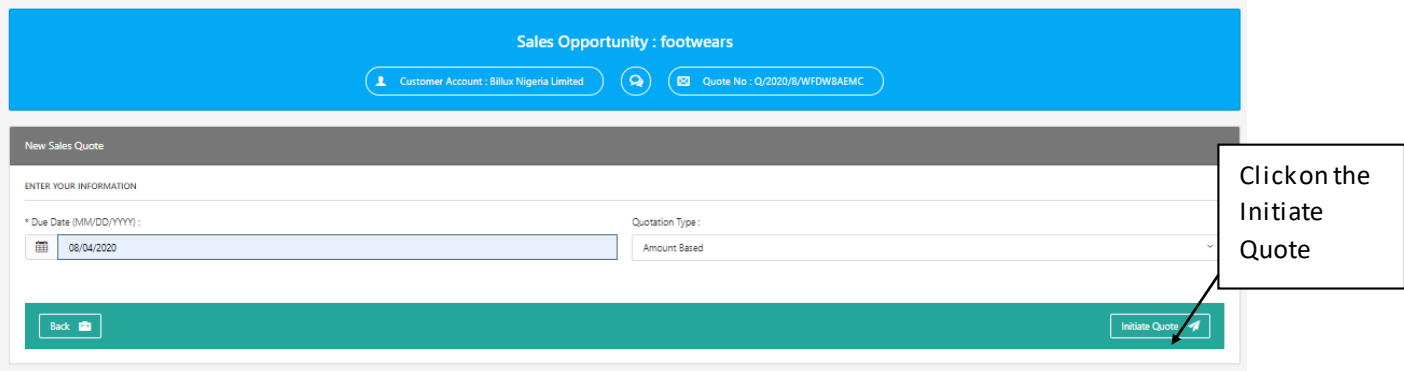
Create New Product Quote



The system provide you new Sales Quote form



Enter the necessary information then click on Initiate Quote



Then the system provide you where you are to add the necessary information shown down below

Sales Opportunity : footwears

Customer Account : Bilux Nigeria Limited Quote No : Q/2020/8/WFDW8AEMC

New Sales Quote

ENTER YOUR INFORMATION

* Product : -- Please Select --	Quote Item : Enter Quote Item	Quantity : Enter Quantity	* Price : Enter Amount
* Amount : Enter Amount	Description : Enter your description here	* Applied Discount : 	Final Amount:

[Add New Item](#)

Enter the necessary information and click on Add New Item shown below

Sales Opportunity : footwears

Customer Account : Bilux Nigeria Limited Quote No : Q/2020/8/WFDW8AEMC

New Sales Quote

ENTER YOUR INFORMATION

* Product : Apple Mac Air	Quote Item : black	Quantity : 4	* Price : 150.000
* Amount : 600000	Description : Enter your description here	* Applied Discount : 0	Final Amount: 600000.00


[Add New Item](#)

Clickon
the Add
New Item

The system provide you details about the Sales Quote

ITEMS

Filter: Show: 10

	Product Name	Quote Item	Item Description	Quantity	Price	Amount	Discount	Final Amount	Actions
	Apple Mac Air	black		4	150000	600000	0	600000	Details Remove

1 of 1 entries

Summary: Total Amount : 600,000.00 Tax : 30,000.00 Total Amount : 630,000.00

[Back to Sale Opportunity](#) [View Quote](#)

Click on Back to Sales Opportunity

3.5 Quote Management

Click on Manage Product Quote

Quotes Management

[Manage Product Quote](#) [View Product Quote](#)

[Create New Service Quote](#)

Quote Number : Q/2020/8/WFDW8AEMC
 Amount : 630,000.00
 Status : Pending

[Previous](#) [Next](#)

Click on Manage Product Quote

Click on the "Action" icon in the grid Request for Approval

Opportunity : footwears

Expected Amount : 630,000.00 Customer Account : Billux Nigeria Limited Expected Close Date : Tuesday, 04 August 2020

Created On : 8/3/2020 | Sales Opportunity Status : Pending

Sales Quote

Filter:

Customer Account	Sales Opportunity	Sales Quote Number	Total Amount	Tax	Final Amount	Status	Actions
Billux Nigeria Limited	footwears	Q/2020/8/WFDW8AEMC	600,000.00	30,000.00	630,000.00	Pending	View Record Request for Approval Request for Discount

Showing 1 to 1 of 1 entries

Click on Request for Approval

The system display that the Product Sales Quote Approval as been sent successfully

The screenshot shows a confirmation message: "Information - Quote sent for approval successfully!". Below the message is a table with one entry. The table has columns for Customer Account, Sales Opportunity, Sales Quote Number, Total Amount, Tax, Final Amount, Status, and Actions. The entry shows a quote for Billux Nigeria Limited with a total amount of 600,000.00 and a status of "Pending Approval - Junior Approval Role".

Customer Account	Sales Opportunity	Sales Quote Number	Total Amount	Tax	Final Amount	Status	Actions
Billux Nigeria Limited	footwears	Q/2020/8/WFDW8AEMC	600.000.00	30.000.00	630.000.00	Pending Approval - Junior Approval Role	

3.6 Sales Quote Approval Pending list

Junior Approval Role->click on "Action" icon in the grid in order to approve pending Sales Quote

The screenshot shows a list of pending sales quote approvals. The table has columns for Transaction Date, Due Date, Sales Quote Number, Total Amount, Tax, Final Amount, Status, and Actions. There are three entries listed. An annotation box with the text "Clickon the Approve Record" points to the "Approve Record" button in the Actions column of the first entry.

Transaction Date	Due Date	Sales Quote Number	Total Amount	Tax	Final Amount	Status	Actions
2020-07-21	07/22/2020	Q/2020/7/10ZBHQQLW	150.000.00	7.500.00	157.500.00	Pending	View Record Approve Record
8/2/2020	08/04/2020	Q/2020/8/W8M8B1XMK	700.000.00	35.000.00	735.000.00	Pending	
8/3/2020	08/04/2020	Q/2020/8/WFDW8AEMC	600.000.00	30.000.00	630.000.00	Pending	

The system provide you Sales Quotation Approval form

Sales Quotation - View Details


VIEW INFORMATION

Customer Number : C/2020/7/W08KP8FB Customer Name : Billux Nigeria Limited Sale Opportunity No : 5/2020/8/79240419 Sale Opportunity : footwears

Quote No : Q/2020/8/WFDW8AEMC Sub-Total : 600,000.00 Tax : 30,000.00 Total Amount : 630,000.00

QUOTE ITEMS

Filter: Show: 10

	Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
	Apple Mac Air	150,000.00	4	600,000.00	0.00	600,000.00	[Details] [Update] [Remove]

Showing 1 to 1 of 1 entries

Approval Information

* Approval Type :

Comments :

[Back to Pending Approval List](#) [Approve](#)

Activate Windows
Go to Settings to activate Windows.

Enter the necessary information and click on Approve button shown below

Sales Quotation - View Details


VIEW INFORMATION

Customer Number : C/2020/7/W08KP8FB Customer Name : Billux Nigeria Limited Sale Opportunity No : 5/2020/8/79240419 Sale Opportunity : footwears

Quote No : Q/2020/8/WFDW8AEMC Sub-Total : 600,000.00 Tax : 30,000.00 Total Amount : 630,000.00

QUOTE ITEMS

Filter: Show: 10

	Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
	Apple Mac Air	150,000.00	4	600,000.00	0.00	600,000.00	[Details] [Update] [Remove]

Showing 1 to 1 of 1 entries

Approval Information

* Approval Type :

Comments :

[Back to Pending Approval List](#) [Approve](#)

Click on the Approve button

Activate Windows
Go to Settings to activate Windows.

3.7 Sales Quote Approval Junior Officer 2 Role

Junior Approval Role->click on “Action” icon in the grid in order to approve pending Sales Quote

Sales Quotes Approval - Pending List

Home / Transaction / Sales Quotes

Filter: Type to filter...

Transaction Date	Due Date	Sales Quote Number	Total Amount	Tax	Final Amount	Status
2020-07-22	07/22/2020	Q/2020/7/FI4WZ081Y	750,000.00	37,500.00	787,500.00	Pending
8/3/2020	08/04/2020	Q/2020/8/WFDW8AEMC	600,000.00	30,000.00	630,000.00	Pending

Showing 1 to 2 of 2 entries

View Record
Approve Record

Click on the Approve Record

The system provide you Sales Quote Approval form

Sales Quotation - View Details

VIEW INFORMATION

Customer Number : C/2020/7/W0BK8P8FB
Customer Name : Billux Nigeria Limited
Sale Opportunity No : S/2020/8/79240419
Sale Opportunity : footwearers
Quote No : Q/2020/8/WFDW8AEMC
Sub-Total : 600,000.00
Tax : 30,000.00
Total Amount : 630,000.00

QUOTE ITEMS

Filter: Type to filter... Show: 10

Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
Apple Mac Air	150,000.00	4	600,000.00	0.00	600,000.00	[Details] [Update] [Remove]

Showing 1 to 1 of 1 entries

Approval Information

* Approval Type : -- Please Select --

Comments : Enter your description or notes here

Back to Pending Approval List
Approve

Activate Windows
Go to Settings to activate Windows.

Enter the necessary information and click on approve button

Sales Quotation - View Details


VIEW INFORMATION

Customer Number : C/2020/7/WDBKPSFFB Customer Name : Billux Nigeria Limited Sale Opportunity No : 5/2020/8/79240419 Sale Opportunity : footwears

Quote No : Q/2020/8/WFDW8AEMC Sub-Total : 600,000.00 Tax : 30,000.00 Total Amount : 630,000.00

QUOTE ITEMS

Filter: Show: 10

Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
 Apple Mac Air	150,000.00	4	600,000.00	0.00	600,000.00	[Details] [Update] [Remove]

Showing 1 to 1 of 1 entries

Approval Information

* Approval Type :

Comments :

[Back to Pending Approval List](#) [Approve](#)

Click on the Approve button

Activate Windows
Go to Settings to activate Windows.

3.8 Sales Quote Approval Senior Officer Role

Senior Approval Role->click on "Action" icon in the grid in order to approve pending Sales Quote

Sales Quotes Approval - Pending List

View Records

Home / Transaction / Sales Quotes

Sales Quotation Approval - Pending

Filter:

Transaction Date	Due Date	Sales Quote Number	Total Amount	Tax	Final Amount	Status	Actions
8/3/2020	08/04/2020	Q/2020/8/WFDW8AEMC	600,000.00	30,000.00	630,000.00	Pending	[View Record] [Approve Record]

Showing 1 to 1 of 1 entries

Click on Approve Record

The system provide you Sales Quote Approval form

Sales Quotation - View Details


VIEW INFORMATION

Customer Number : C/2020/7/W0BKPBFB Customer Name : Billux Nigeria Limited Sale Opportunity No : S/2020/8/79240419 Sale Opportunity : footwear

Quote No : Q/2020/8/WFDWBAEMC Sub-Total : 600,000.00 Tax : 30,000.00 Total Amount : 630,000.00

QUOTE ITEMS

Filter: Show: 10

	Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
	Apple Mac Air	150,000.00	4	600,000.00	0.00	600,000.00	[Details] [Update] [Remove]

Showing 1 to 1 of 1 entries

Approval Information

* Approval Type :
-- Please Select --

Comments :

[Back to Pending Approval List](#) [Approve](#)

Activate Windows
Go to Settings to activate Windows.

Enter the necessary information and click on approve button

Sales Quotation - View Details


VIEW INFORMATION

Customer Number : C/2020/7/W0BKPBFB Customer Name : Billux Nigeria Limited Sale Opportunity No : S/2020/8/79240419 Sale Opportunity : footwear

Quote No : Q/2020/8/WFDWBAEMC Sub-Total : 600,000.00 Tax : 30,000.00 Total Amount : 630,000.00

QUOTE ITEMS

Filter: Show: 10

	Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
	Apple Mac Air	150,000.00	4	600,000.00	0.00	600,000.00	[Details] [Update] [Remove]

Showing 1 to 1 of 1 entries

Approval Information

* Approval Type :
Approved

Comments :

[Back to Pending Approval List](#) [Approve](#)

Click on the Approve button

Activate Windows
Go to Settings to activate Windows.

3.9 Quote Management

Click on Create New Negotiation

0 TOTAL MESSAGES

0.00 TOTAL SALES EXPENSES

0 CASES

0 SALES ACTIVITIES

Opportunity Management

-- Select an Action --

-- Change Sales Opportunity Status --

Initiate

Qualify

Quote

Negotiate

Close

Quotes Management

Create New Product Negotiation

Create New Service Negotiation

Previous

Next

Click on Create New Product Negotiation

The system provide you Sales Negotiation form

Sales Opportunity : footwears

Customer Account : Billux Nigeria Limited

Expected Amount : 600000

Expected Close Date : 8/4/2020 12:00:00 AM

Created On : 8/3/2020 | Sales Opportunity Status : Pending

Sales Negotiation - Update

ENTER YOUR INFORMATION

Quote Number : Q/2020/8/4ADMAPP9M Amount : 630,000.00

* Negotiation Date (MM/DD/YYYY) :

Enter Scheduled Date

Negotiated Amount :

Enter Negotiated Amount

Negotiated Outcome :

-- Please Select --

Feedback :

Enter your Feedback here

Attendees :

Enter your Attendees here

Back to List

Submit Feedback

Enter the necessary information on Sales Negotiation and click Submit Feedback as it is shown below

Sales Opportunity : footwears

Customer Account : Billux Nigeria Limited
Expected Amount : 600000
Expected Close Date : 8/4/2020 12:00:00 AM

Created On : 8/3/2020 | Sales Opportunity Status : Pending

Sales Negotiation - Update

ENTER YOUR INFORMATION

Quote Number : Q/2020/8/4ADMAPF9M Amount : 630,000.00

* Negotiation Date (MM/DD/YYYY) : Negotiated Amount : Negotiated Outcome :

Feedback : Attendees :

[Back to List](#)
[Submit Feedback](#)

Clickon the Submit Feedback button

4.0 Sales Opportunity Management

Click on Sales closure ->Close Sales

0 TOTAL MESSAGES 0.00 TOTAL SALES EXPENSES 0 CASES 0 SALES ACTIVITIES

Sales Opportunity Management -- Select an Action -- -- Change Sales Opportunity Status --

Initiate
Quality
Quote
Negotiate
Close

Sales Closure

Quote Number : Q/2020/8/01MWLZLEP
Amount : 630,000.00

[Close Sales](#)

[Previous](#)
[Submit form](#)

Clickon Sales Close

The system provide you Sales Closure form

Sales Opportunity : footwears

Expected Amount : 630,000.00 | Customer Account : footwears | Expected Close Date : Tuesday, 04 August 2020

Created On : 8/3/2020 | Sales Opportunity Status : Pending | Sales Lead : | Sales Opportunity No : 5/2020/8/79240419

Sales Closure Back to Sales Qualification

ENTER YOUR INFORMATION

* Closure Status:
-- Please Select --

* Actual Closed Date (MM/DD/YYYY):
Enter Sales Closure Date

Reference Number :
Enter Reference No

Name of Competitor lost to :
Name of the competitor

Lost Reason Comments :
Enter your description or notes here

Back to List Close Sales #+

Enter the necessary information and click on Close Sales button shown below

Sales Opportunity : footwears

Expected Amount : 630,000.00 | Customer Account : footwears | Expected Close Date : Tuesday, 04 August 2020

Created On : 8/3/2020 | Sales Opportunity Status : Pending | Sales Lead : | Sales Opportunity No : 5/2020/8/79240419

Sales Closure Back to Sales Q

ENTER YOUR INFORMATION

* Closure Status:
Sales Won

* Actual Closed Date (MM/DD/YYYY):
08/04/2020

Reference Number :
SDFGHJ

Back to List Close Sales #+

Clickon the Close Sales button

Then the system provide you Sales Opportunity grids which indicate that the Sales Opportunity as been won

Filter:

Show:

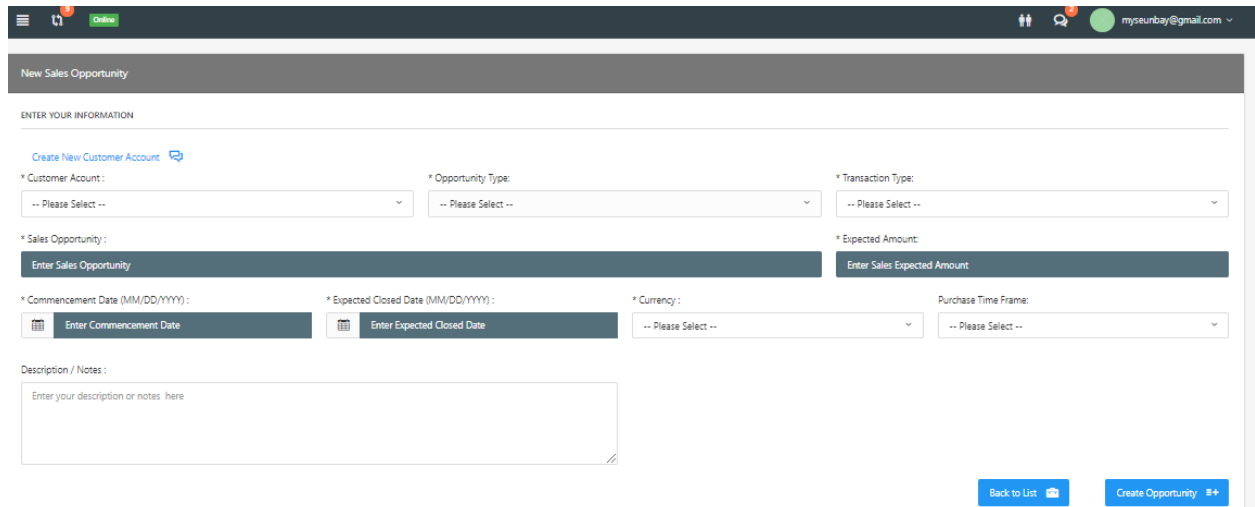
Customer Account	Opportunity No	Opportunity	Type	Expected Start Date	Expected End Date	Expected Amount	Actual End Date	Actual Amount	Status	Actions
Billux Nigeria Limited	S/2020/7/19610724	Gas supply	Warm Opportunity	07/07/2020	7/24/2020 12:00:00 AM	13000000		0	Pending	⋮
Billux Nigeria Limited	S/2020/7/76597574	Gas supply	Warm Opportunity	07/07/2020	7/24/2020 12:00:00 AM	13000000	07/10/2020	15750000	Sales Won	⋮
Billux Nigeria Limited	S/2020/7/49438556	Not Applicable	Warm Opportunity	07/23/2020	7/31/2020 12:00:00 AM	350000	07/23/2020	315000	Sales Won	⋮
Billux Nigeria Limited	S/2020/7/46926468	Test Incident	Warm Opportunity	07/24/2020	7/31/2020 12:00:00 AM	350000		0	Pending	⋮
Billux Nigeria Limited	S/2020/8/35790007	HENRY	Hot Opportunity	08/03/2020	8/18/2020 12:00:00 AM	400000		0	Pending	⋮
Billux Nigeria Limited	S/2020/8/41372865	footwears	Hot Opportunity	08/01/2020	8/4/2020 12:00:00 AM	500001		0	Pending	⋮
Billux Nigeria Limited	S/2020/8/79473944	footwears	Hot Opportunity	08/01/2020	8/4/2020 12:00:00 AM	600000		0	Pending	⋮
Billux Nigeria Limited	S/2020/8/70664488	footwears	Hot Opportunity	08/01/2020	8/4/2020 12:00:00 AM	630000		0	Pending	⋮
Billux Nigeria Limited	S/2020/8/79240419	footwears	Hot Opportunity	08/01/2020	8/4/2020 12:00:00 AM	630000	08/04/2020	630000	Sales Won	⋮

Activate Windows

4.1 Sales Opportunity Approval

Create Sales Opportunity

Enter the necessary information on New Sales Opportunity

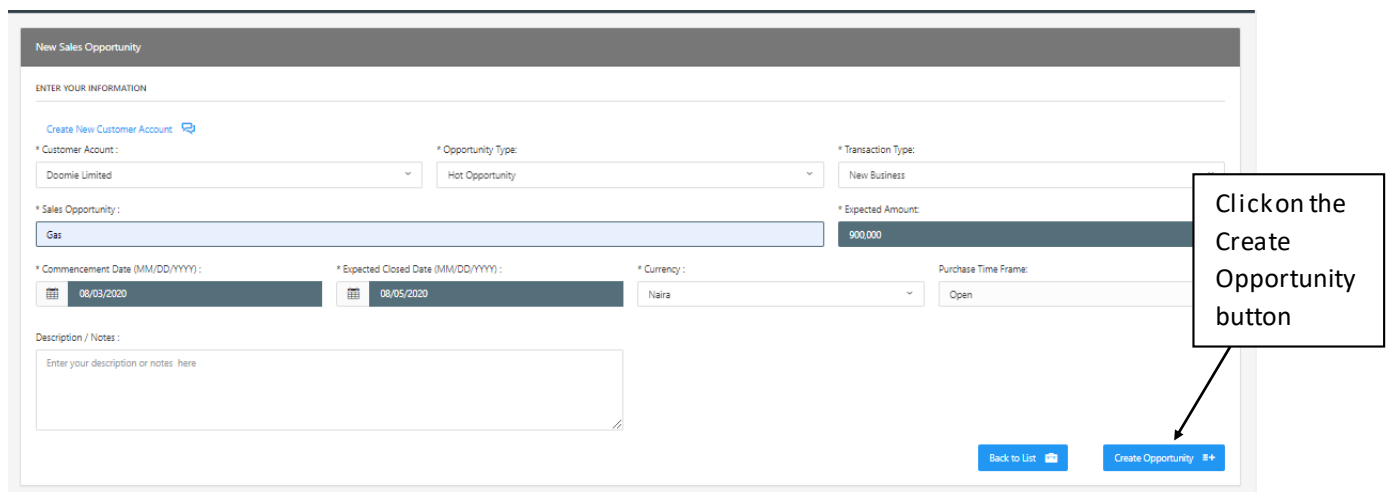


The screenshot shows the 'New Sales Opportunity' form with the following fields and options:

- Customer Account:** -- Please Select --
- Opportunity Type:** -- Please Select --
- Transaction Type:** -- Please Select --
- Sales Opportunity:** Enter Sales Opportunity
- Expected Amount:** Enter Sales Expected Amount
- Commencement Date (MM/DD/YYYY):** Enter Commencement Date
- Expected Closed Date (MM/DD/YYYY):** Enter Expected Closed Date
- Currency:** -- Please Select --
- Purchase Time Frame:** -- Please Select --
- Description / Notes:** Enter your description or notes here

Buttons at the bottom right: [Back to List](#) and [Create Opportunity](#) #+

Enter the required information and click on the Create Opportunity



The screenshot shows the 'New Sales Opportunity' form with the following fields filled:

- Customer Account:** Doomie Limited
- Opportunity Type:** Hot Opportunity
- Transaction Type:** New Business
- Sales Opportunity:** Gas
- Expected Amount:** 900,000
- Commencement Date (MM/DD/YYYY):** 08/03/2020
- Expected Closed Date (MM/DD/YYYY):** 08/05/2020
- Currency:** Naira
- Purchase Time Frame:** Open
- Description / Notes:** Enter your description or notes here

Buttons at the bottom right: [Back to List](#) and [Create Opportunity](#) #+. A callout box with the text "Click on the Create Opportunity button" has an arrow pointing to the "Create Opportunity" button.

4.2 Quote Management

Click on Create New Product Quote

The screenshot shows the Sales Opportunity Management dashboard. At the top, there are four summary cards: 'TOTAL MESSAGES' (0), 'TOTAL SALES EXPENSES' (0.00), 'CASES' (0), and 'SALES ACTIVITIES' (0). Below these is a 'Sales Opportunity Management' section with a progress bar showing five stages: 'Initiate' (checked), 'Qualify' (checked), 'Quote' (active), 'Negotiate' (4), and 'Close' (5). A callout box on the left says 'Click on Create New Product Quote' and points to a red button labeled 'Create New Product Quote' in the 'Quotes Management' section. Another button 'Create New Service Quote' is visible below it. Navigation buttons 'Previous' and 'Next' are at the bottom right.

The system provide you new Sales Quote form

The screenshot shows the 'New Sales Quote' form. The header is 'Sales Opportunity : Gas' with 'Customer Account : Doomie Limited' and 'Quote No : Q/2020/8/QDNHPB4MP'. The form has a section 'ENTER YOUR INFORMATION' with a 'Due Date (MM/DD/YYYY)' field containing 'Enter Sched.Led Date' and a 'Quotation Type' dropdown menu with '-- Please Select --'. At the bottom, there are 'Back' and 'Initiate Quote' buttons.

Enter the necessary information and click on the Initiate Quote button

This screenshot is identical to the previous one, but the 'Due Date' field now contains '08/05/2020' and the 'Quotation Type' dropdown is set to 'Amount Based'. A callout box on the right says 'Click on the Initiate Quote button' and points to the 'Initiate Quote' button.

Then the system provide you where you are to add the necessary information shown down below

Sales Opportunity : Gas

Customer Account : Doomie Limited Quote No : QJ2020/8/QDNHP84MP

New Sales Quote

ENTER YOUR INFORMATION

* Product : -- Please Select --	Quote Item : Enter Quote Item	Quantity : Enter Quantity	* Price : Enter Amount
* Amount : Enter Amount	Description : Enter your description here	* Applied Discount : 	Final Amount :

[Add New Item](#)

Enter the necessary information then click on the Add New Item button as it shown below

New Sales Quote

ENTER YOUR INFORMATION

Product : -- Please Select --	Quote Item : black	Quantity : 6	* Price : 150,000
* Amount : Enter Amount	Description : Enter your description here	* Applied Discount : 0	Final Amount : 900,000.00


[Add New Item](#)

Click on the Add New Item button

The system indicate that the quote item is added successfully

ITEMS

Filter: Type to filter... Show: 10

	Product Name	Quote Item	Item Description	Quantity	Price	Amount	Discount	Final Amount	Actions
	Apple Mac Air	black		6	150000	900000	0	900000	Details Remove

Showing 1 to 1 of 1 entries

SUBMIT QUOTATION

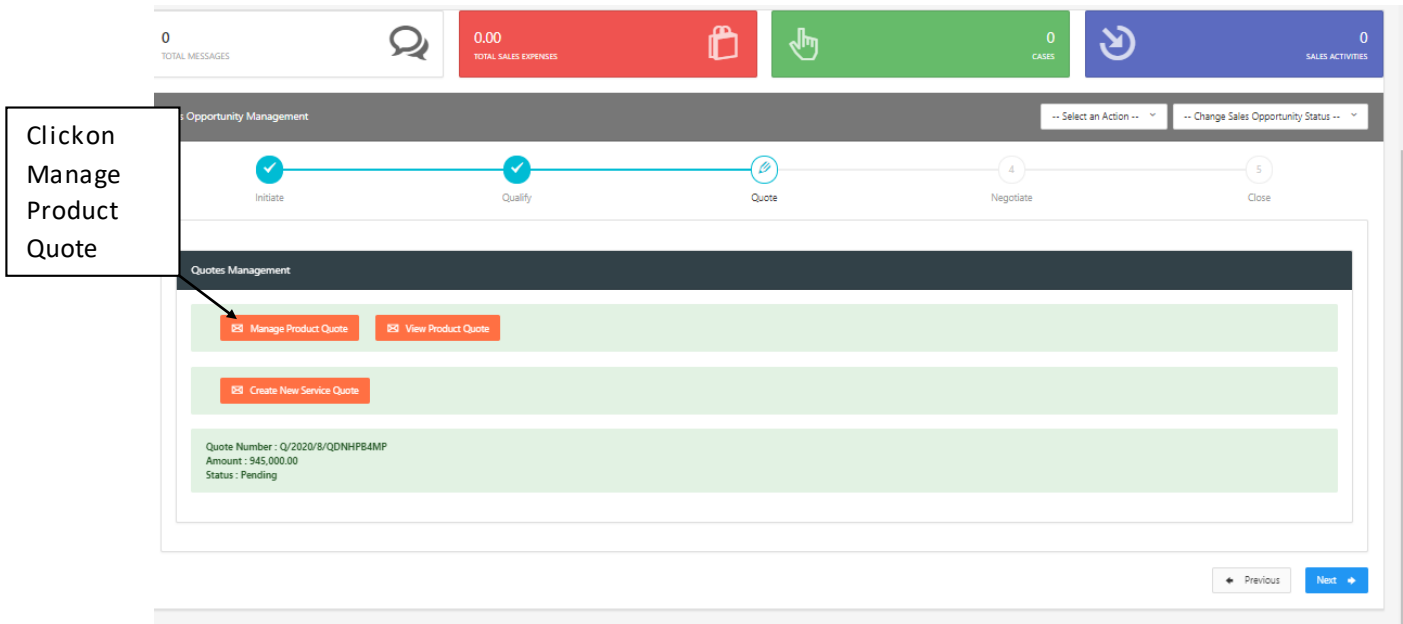
Sub-Total Amount : 900,000.00 Tax : 45,000.00 Total Amount : 945,000.00

[Back to Sale Opportunity](#) [View Quote](#)

Click on Back to Sales Opportunity

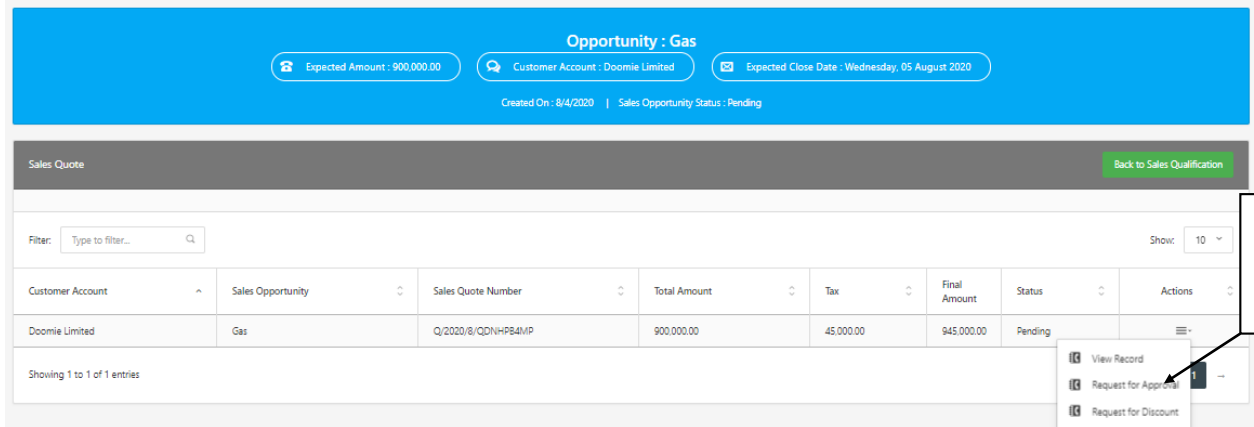
4.3 Quote Management

Click on Manage Product Quote then the system will display Sales Quote grid shown below



Clickon
Manage
Product
Quote

Click on the "Action" icon in the grid to Request for Approval



Clickon
request for
Approval

The system display that the request for approval as been sent successfully

Opportunity : Gas

Expected Amount : 900,000.00
Customer Account : Doomie Limited
Expected Close Date : Wednesday, 05 August 2020

Created On : 8/4/2020 | Sales Opportunity Status : Pending

Sales Quote Back to Sales Qualification

Information - Quote sent for approval successfully!

Filter: Show: 10

Customer Account	Sales Opportunity	Sales Quote Number	Total Amount	Tax	Final Amount	Status	Actions
Doomie Limited	Gas	Q/2020/8/QDNHP84MP	900,000.00	45,000.00	945,000.00	Pending Approval - Junior Approval Role	

Showing 1 to 1 of 1 entries

4.4 Product Quotation Approval Pending list

Click on Approval-> Pending Approval

Clickon Approvals

- Sales Management >
- Approvals >
- Account Opening Management >
- Sales Operations >
- Expense Management >
- Customer Account >

Junior Approval Role->click on "Action" icon in the grid in order to approve pending Sales Quote

Sales Quotes Approval - Pending List
View Records

Home / Transaction / Sales Quotes

Sales Quotation Approval - Pending

Filter: Show: 10

Transaction Date	Due Date	Sales Quote Number	Total Amount	Tax	Final Amount	Status	Actions
2020-07-21	07/22/2020	Q/2020/7/10ZB+QQLW	150,000.00	7,500.00	157,500.00	Pending	[View Record] [Approve Record]
8/2/2020	08/04/2020	Q/2020/8/W8MBB1XMK	700,000.00	35,000.00	735,000.00	Pending	[View Record] [Approve Record]
8/4/2020	08/05/2020	Q/2020/8/QDNHP84MP	900,000.00	45,000.00	945,000.00	Pending	[View Record] [Approve Record]
8/4/2020	08/05/2020	Q/2020/8/QDNHP84MP	900,000.00	45,000.00	945,000.00	Pending	[View Record] [Approve Record]

Showing 1 to 4 of 4 entries

Click on the Approve Record

The system provide you Sales Quote Approval form


Sales Quotation - View Details

VIEW INFORMATION

Customer Number : C/2020/6/Y9M8P7E02	Customer Name : Doomie Limited	Sale Opportunity No : S/2020/8/38033902	Sale Opportunity : Gas
Quote No : Q/2020/8/QDNHP84MP	Sub-Total : 900,000.00	Tax : 45,000.00	Total Amount : 945,000.00

QUOTE ITEMS

Filter: Show: 10

	Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
	Apple Mac Air	150,000.00	6	900,000.00	0.00	900,000.00	[Details] [Update] [Remove]

Showing 1 to 1 of 1 entries

Approval Information

* Approval Type :
-- Please Select --

Comments :

[Back to Pending Approval List](#) [Approve](#)

Activate Windows
Go to Settings to activate Windows.

Enter the necessary information and click on the approve button


Sales Quotation - View Details

VIEW INFORMATION

Customer Number : C/2020/6/Y9M8P7E02	Customer Name : Doomie Limited	Sale Opportunity No : S/2020/8/3803902	Sale Opportunity : Gas
Quote No : Q/2020/8/QDNHP84MP	Sub-Total : 900,000.00	Tax : 45,000.00	Total Amount : 945,000.00

QUOTE ITEMS

Filter: Show: 10

	Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
	Apple Mac Air	150,000.00	6	900,000.00	0.00	900,000.00	[Details] [Update] [Remove]

Showing 1 to 1 of 1 entries

Approval Information

* Approval Type :
Approved

Comments :
[TEST]

[Back to Pending Approval List](#) [Approve](#) #+







Activate Windows
Go to Settings to activate Windows.

Click on the Approve Button

4.5 Product Quotation Approval Pending list

Click on Approval-> Pending Approval

Click on Approvals

-  Sales Management >
-  Approvals >
-  Account Opening Management >
-  Sales Operations >
-  Expense Management >
-  Customer Account >

Junior Approval Role 2->click on "Action" icon in the grid in order to approve pending Sales Quote

Online

myseunbay@gmail.com

Sales Quotes Approval - Pending List

View Records

Home / Transaction / Sales Quotes

Sales Quotation Approval - Pending

Filter: Type to filter...

Transaction Date	Due Date	Sales Quote Number	Total Amount	Tax	Final Amount	Status	Actions
2020-07-22	07/22/2020	Q/2020/7/FI4W2081Y	750,000.00	37,500.00	787,500.00	Pending	
8/4/2020	08/05/2020	Q/2020/8/QDNHPB4MP	900,000.00	45,000.00	945,000.00	Pending	View Record Approve Record

Showing 1 to 2 of 2 entries

Click on the Approve Record

The system provide you Sales Quote Approval form


Sales Quotation - View Details

VIEW INFORMATION

Customer Number : C/2020/6/Y9M8P7E02	Customer Name : Doomie Limited	Sale Opportunity No : 5/2020/8/38033902	Sale Opportunity : Gas
Quote No : Q/2020/8/QDNHPB4MP	Sub-Total : 900,000.00	Tax : 45,000.00	Total Amount : 945,000.00

QUOTE ITEMS

Filter: Type to filter... Show: 10

Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
 Apple Mac Air	150,000.00	6	900,000.00	0.00	900,000.00	Details Update Remove

Showing 1 to 1 of 1 entries

Approval Information

* Approval Type :
-- Please Select --

Comments :
Enter your description or notes here

Back to Pending Approval List | Approve

Activate Windows
Go to Settings to activate Windows.

Enter the necessary information and click on the approve button


Sales Quotation - View Details

VIEW INFORMATION

Customer Number : C/2020/8/9M/8P7E02	Customer Name : Doomie Limited	Sale Opportunity No : S/2020/8/38033902	Sale Opportunity : Gas
Quote No : Q/2020/8/QDN/HP8AMP	Sub-Total : 900,000.00	Tax : 45,000.00	Total Amount : 945,000.00

QUOTE ITEMS

Filter: Show: 10

	Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
	Apple Mac Air	150,000.00	6	900,000.00	0.00	900,000.00	[Details] [Update] [Remove]

Showing 1 to 1 of 1 entries

Approval Information

* Approval Type :
Approved

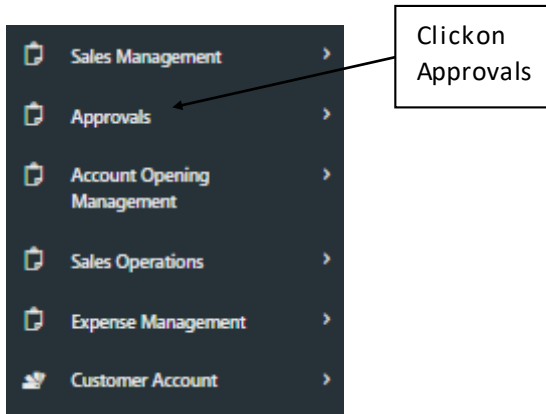
Comments :
test

Back to Pending Approval List Approve

Activate Windows
Go to Settings to activate Windows.

4.6 Product Quotation Approval Pending list

Click on Approval-> Pending Approval



Clickon Approvals

- Sales Management
- Approvals
- Account Opening Management
- Sales Operations
- Expense Management
- Customer Account

Senior Approval Role ->click on "Action" icon in the grid in order to approve pending Sales Quote

Online bamisondds1@gmail.com

Sales Quotes Approval - Pending List

View Records

Home / Transaction / Sales Quotes Actions

Sales Quotation Approval - Pending

Filter:

Transaction Date	Due Date	Sales Quote Number	Total Amount	Tax	Final Amount	Status	Actions
8/4/2020	08/05/2020	Q/2020/8/QDNHPB4MP	900,000.00	45,000.00	945,000.00	Pending	<ul style="list-style-type: none"> View Record Approve Record

Showing 1 to 1 of 1 entries

Click on the Approve Record

The system provide you Sales Quote Approval form


Sales Quotation - View Details

VIEW INFORMATION

Customer Number : C/2020/6/Y9M8P7E02	Customer Name : Doomie Limited	Sale Opportunity No : S/2020/8/38033902	Sale Opportunity : Gas
Quote No : Q/2020/8/QDNHPB4MP	Sub-Total : 900,000.00	Tax : 45,000.00	Total Amount : 945,000.00

QUOTE ITEMS

Filter: Show: 10

	Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
	Apple Mac Air	150,000.00	6	900,000.00	0.00	900,000.00	[Details] [Update] [Remove]

Showing 1 to 1 of 1 entries

Approval Information

* Approval Type :
-- Please Select --

Comments :
Enter your description or notes here

Activate Windows
Go to Settings to activate Windows.

[Back to Pending Approval List](#) [Approve](#)

Enter the necessary information and click on the approve button


Sales Quotation - View Details

VIEW INFORMATION

Customer Number : C/2020/6/Y9M/8P7E02	Customer Name : Doomie Limited	Sale Opportunity No : S/2020/8/38039902	Sale Opportunity : Gas
Quote No : Q/2020/8/QDN/HRB4MP	Sub-Total : 900,000.00	Tax : 45,000.00	Total Amount : 945,000.00

QUOTE ITEMS

Filter: Show: 10

	Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
	Apple Mac Air	150,000.00	6	900,000.00	0.00	900,000.00	Details Update Remove

Showing 1 to 1 of 1 entries

Approval Information

* Approval Type :
Approved

Comments :
TEST

[Back to Pending Approval List](#) [Approve](#) #+







Click on the Approve button

Activate Windows
Go to Settings to activate Windows.

4.7 Product Quotation Approval Pending list

Click on Approval-> Pending Approval

Click on Approvals

-  Sales Management >
-  Approvals >
-  Account Opening Management >
-  Sales Operations >
-  Expense Management >
-  Customer Account >

Senior Approval Role 2 ->click on "Action" icon in the grid in order to approve pending Sales Quote

Sales Quotes Approval - Pending List

Home / Transaction / Sales Quotes

Sales Quotation Approval - Pending

Filter: Show: 10

Transaction Date	Due Date	Sales Quote Number	Total Amount	Tax	Final Amount	Status	Actions
2020-07-22	07/22/2020	Q/2020/7/F14WZ081Y	750,000.00	37,500.00	787,500.00	Pending	View Record
8/4/2020	08/05/2020	Q/2020/8/QDNHP84MP	900,000.00	45,000.00	945,000.00	Pending	View Record Approve Record

Showing 1 to 2 of 2 entries

Clickon Approve Record

The system provide you Sales Quote Approval form


Sales Quotation - View Details

VIEW INFORMATION

Customer Number : C/2020/6/Y9M8PTE02	Customer Name : Doomie Limited	Sale Opportunity No : S/2020/8/38033902	Sale Opportunity : Gas
Quote No : Q/2020/8/QDNHP84MP	Sub-Total : 900,000.00	Tax : 45,000.00	Total Amount : 945,000.00

QUOTE ITEMS

Filter: Show: 10

	Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
	Apple Mac Air	150,000.00	6	900,000.00	0.00	900,000.00	[Details] [Update] [Remove]

Showing 1 to 1 of 1 entries

Approval Information

* Approval Type :
-- Please Select --

Comments :
Enter your description or notes here

Back to Pending Approval List [Approve](#)

Activate Windows
Go to Settings to activate Windows.

Enter the necessary information and click on the Approve button

VIEW INFORMATION

Customer Number : C/2020/6/Y9V8P7E02	Customer Name : Doomie Limited	Sale Opportunity No : 5/2020/8/38033902	Sale Opportunity : Gas
Quote No : Q/2020/8/QDNHP84MP	Sub-Total : 900.000.00	Tax : 45.000.00	Total Amount : 945.000.00

QUOTE ITEMS

Filter:

Show: 10

	Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
	Apple Mac Air	150.000.00	6	900.000.00	0.00	900.000.00	[Details] [Update] [Remove]

Showing 1 to 1 of 1 entries

1

Approval information

* Approval Type :

Approved

Comments :

TEST

Activate Windows
Go to Settings to activate Windows.

[Back to Pending Approval List](#)

[Approve](#)

4.8 Quote Management

Create New Product Negotiation

The screenshot displays the 'Sales Opportunity : Gas' management interface. At the top, a blue header bar contains key information: 'Expected Amount : 900,000.00', 'Customer Account : Doornie Limited', and 'Expected Close Date : Wednesday, 05 August 2020'. Below this, a status bar shows 'Created On : 8/4/2020', 'Sales Opportunity Status : Pending', 'Sales Lead :', and 'Sales Opportunity No : S/2020/8/38033902'. A dashboard below the header shows metrics for 'TOTAL MESSAGES' (0), 'TOTAL SALES EXPENSES' (0.00), 'CASES' (0), and 'SALES ACTIVITIES' (0). A progress bar indicates the current stage is 'Negotiate', with previous stages 'Initiate', 'Qualify', and 'Quote' completed. A callout box with an arrow points to a red button labeled 'Create New Product Negotiation' within the 'Quote Management' section. Other buttons include 'Create New Service Negotiation'. At the bottom right, there are 'Previous' and 'Next' navigation buttons and a note: 'Activate Windows. Go to Settings to activate Windows.'

Click on
create new
Product
Negotiation

The system provide you Sales Negotiation form

The screenshot shows the 'Sales Negotiation - Update' form. The header bar is blue and contains 'Sales Opportunity : Gas' with details: 'Customer Account : Doornie Limited', 'Expected Amount : 900000', and 'Expected Close Date : 8/5/2020 12:00:00 AM'. Below the header, the form is titled 'Sales Negotiation - Update' and has a section 'ENTER YOUR INFORMATION'. A green bar displays 'Quote Number : Q/2020/8/QDNHPB4MP Amount : 945,000.00'. The form includes three input fields: '* Negotiation Date (MM/DD/YYYY):' with a calendar icon and 'Enter Scheduled Date', 'Negotiated Amount:' with 'Enter Negotiated Amount', and 'Negotiated Outcome:' with a dropdown menu showing '-- Please Select --'. There are two text areas: 'Feedback:' with 'Enter your Feedback here' and 'Attendees:' with 'Enter your Attendees here'. At the bottom right, there are two buttons: 'Back to List' and 'Submit Feedback'.

Enter the required information and click on Submit Feedback button

Sales Opportunity : Gas

Customer Account : Doomie Limited Expected Amount : 900000 Expected Close Date : 8/5/2020 12:00:00 AM

Created On : 8/4/2020 | Sales Opportunity Status : Pending

Sales Negotiation - Update

ENTER YOUR INFORMATION

Quote Number : Q/2020/8/QDNHPB4MP Amount : 945,000.00

* Negotiation Date (MM/DD/YYYY) : 08/05/2020 Negotiated Amount : 945000 Negotiated Outcome : Negotiation Completed

Feedback : Enter your Feedback here

Attendees : Enter your Attendees here

[Back to List](#) [Submit Feedback](#)

Click on the Submit Feedback button

4.9 Sales Opportunity Management

Sales Closure->Close Sales

Sales Opportunity : Gas

Expected Amount : 900,000.00 Customer Account : Doomie Limited Expected Close Date : Wednesday, 05 August 2020

Created On : 8/4/2020 | Sales Opportunity Status : Pending | Sales Lead : | Sales Opportunity No : S/2020/8/38033902

0 TOTAL MESSAGES 0.00 TOTAL SALES EXPENSES 0 CASES 0 SALES ACTIVITIES

Sales Opportunity Management -- Select an Action -- -- Change Sales Opportunity Status --

Initiate Qualify Quote Negotiate Close

Sales Closure

Quote Number : Q/2020/8/QDNHPB4MP
Amount : 945,000.00

[Close Sales](#)

[Previous](#) [Submit form](#)

Click on Close Sales

The system provide you Sales Closure form

Sales Opportunity : Gas

Expected Amount : 900,000.00
Customer Account : Gas
Expected Close Date : Wednesday, 05 August 2020

Created On : 8/4/2020 | Sales Opportunity Status : Pending | Sales Lead : | Sales Opportunity No : 5/2020/8/38033902

Sales Closure Back to Sales Qualification

ENTER YOUR INFORMATION

* Closure Status:

* Actual Closed Date (MM/DD/YYYY): Reference Number:

[Back to List](#) [Close Sales](#)

Enter the required information and click on the Close Sales button

Sales Opportunity : Gas

Expected Amount : 900,000.00
Customer Account : Gas
Expected Close Date : Wednesday, 05 August 2020

Created On : 8/4/2020 | Sales Opportunity Status : Pending | Sales Lead : | Sales Opportunity No : 5/2020/8/38033902

Sales Closure Back to Sales Qualification

ENTER YOUR INFORMATION

* Closure Status:

* Actual Closed Date (MM/DD/YYYY): Reference Number:

[Back to List](#) [Close Sales](#)

Click on the Close Sales button

Then the system provide you Sales Opportunity grids which indicate that the Sales Opportunity as been won

Sales Opportunity List

Filter: Show: 10

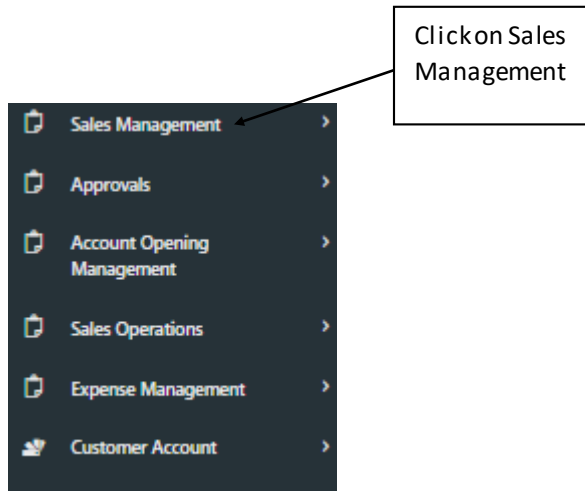
Customer Account	Opportunity No	Opportunity	Type	Expected Start Date	Expected End Date	Expected Amount	Actual End Date	Actual Amount	Status	Actions
Doomie Limited	5/2020/7/65403925	Not Applicable	Warm Opportunity	07/23/2020	7/31/2020 12:00:00 AM	70000		0	Pending	
Doomie Limited	5/2020/7/95469297	footwears	Hot Opportunity	07/25/2020	7/31/2020 12:00:00 AM	500000		0	Pending	
Doomie Limited	5/2020/8/38033902	Gas	Hot Opportunity	08/03/2020	8/5/2020 12:00:00 AM	900000	08/04/2020	945000	Sales Won	

Showing 11 to 13 of 13 entries (filtered from 114 total entries)

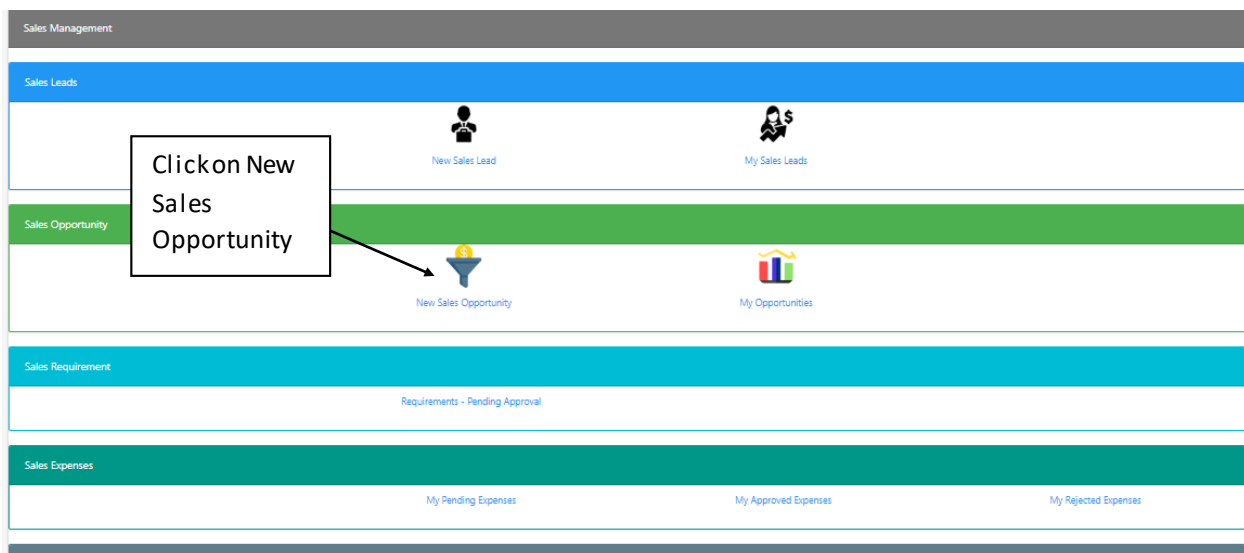
- 1 2 -

5.0 Sales Management

Create Sales Opportunity->click on New Sales Opportunity



Then system provide you Sales Management grid click on New Sales Opportunity



The system provide you News Sales Opportunity form

New Sales Opportunity

ENTER YOUR INFORMATION

[Create New Customer Account](#)

* Customer Account: * Opportunity Type: * Transaction Type:

* Sales Opportunity: * Expected Amount:

* Commencement Date (MM/DD/YYYY): * Expected Closed Date (MM/DD/YYYY): * Currency: Purchase Time Frame:

Description / Notes:

[Back to List](#) [Create Opportunity](#)

Enter the necessary information and click on Create Opportunity button

New Sales Opportunity

ENTER YOUR INFORMATION

[Create New Customer Account](#)

* Customer Account: * Opportunity Type: * Transaction Type:

* Sales Opportunity: * Expected Amount:

* Commencement Date (MM/DD/YYYY): * Expected Closed Date (MM/DD/YYYY): * Currency: Purchase Time Frame:

Description / Notes:

[Back to List](#) [Create Opportunity](#)

Click on the Create Opportunity button

5.1 Quote Management

Create New Product Quote

The screenshot shows the 'Sales Opportunity Management' dashboard. At the top, there are four summary cards: 'TOTAL MESSAGES' (0), 'TOTAL SALES EXPENSES' (0.00), 'CASES' (0), and 'SALES ACTIVITIES' (0). Below these is a progress bar with five stages: 'Initiate' (checked), 'Qualify' (checked), 'Quote' (active), 'Negotiate' (4), and 'Close' (5). A callout box on the left points to a red button labeled 'Create New Product Quote' in the 'Quotes Management' section. Other buttons include 'Create New Service Quote', 'Previous', and 'Next'.

Click on New Product Quote

The system provide you New Sales Quote form

The 'New Sales Quote' form is displayed. The header shows 'Sales Opportunity : footwears' with 'Customer Account : Devcom Limited' and 'Quote No : Q/2020/8/B63WNE9GC'. The form section is titled 'ENTER YOUR INFORMATION' and contains a date field for '* Due Date (MM/DD/YYYY):' with a placeholder 'Enter Scheduled Date' and a dropdown for 'Quotation Type:' with a placeholder '-- Please Select --'. At the bottom, there are 'Back' and 'Initiate Quote' buttons.

Enter the necessary information and click on Initiate Quote button

The 'New Sales Quote' form is shown with the date field filled with '08/04/2020' and the 'Quotation Type:' dropdown set to 'Price Based'. A callout box on the right points to the 'Initiate Quote' button.

Click on the Initiate Quote

Then the system provide you where you are to add the necessary information

Sales Opportunity : footwears

Customer Account : Devcom Limited Quote No : Q/2020/8/863WNE9GC

New Sales Quote

ENTER YOUR INFORMATION

* Product : Unit Price : * Quantity : * Amount :

* Applied Discount : Final Amount :

[Add New Item](#)

Enter the necessary information then click on the Add New Item button as it shown below

Sales Opportunity : footwears

Customer Account : Devcom Limited Quote No : Q/2020/8/863WNE9GC

New Sales Quote

ENTER YOUR INFORMATION

* Product : Unit Price : * Quantity : * Amount :

* Applied Discount : Final Amount :


[Add New Item](#)

Click on the Add New Item

The system indicate that the quote item is added successfully

ITEMS

Filter: Show:

	Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
	Apple Mac Air	150,000.00	9	1,350,000.00	0.00	1,350,000.00	Details Update Remove

Showing 1 to 1 of 1 entries

SUBMIT QUOTATION

Sub-Total Amount : 1,350,000.00 Tax : 67,500.00 Total Amount : 1,417,500.00

[View Quote](#) [Complete](#)

Click on the complete button

5.2 Quote Management

Click on Manage product Quote then the system will display sales quote grid show below

The screenshot shows the 'Sales Opportunity Management' interface. At the top, there are four colored boxes: '0 TOTAL MESSAGES' (grey), '0.00 TOTAL SALES EXPENSES' (red), '0 CASES' (green), and '0 SALES ACTIVITIES' (blue). Below this is a progress bar with five steps: 'Initiate', 'Qualify', 'Quote', 'Negotiate', and 'Close'. The 'Quote' step is currently active. Below the progress bar is the 'Quotes Management' section, which contains three buttons: 'Manage Product Quote', 'View Product Quote', and 'Create New Service Quote'. A callout box with the text 'Click on the Manage Product Quote' points to the 'Manage Product Quote' button. Below the buttons, there is a summary card for a quote: 'Quote Number : Q/2020/8/B63WNE9GC', 'Amount : 1,417,500.00', and 'Status : Pending'. At the bottom right, there are 'Previous' and 'Next' navigation buttons.

Click on the "Action in the grid to request for Approval

The screenshot shows the 'Sales Quote' grid for an opportunity named 'footwears'. The header bar is blue and contains the following information: 'Expected Amount : 1,350,000.00', 'Customer Account : Devcom Limited', and 'Expected Close Date : Tuesday, 04 August 2020'. Below the header, it says 'Created On : 8/6/2020 | Sales Opportunity Status : Pending'. The grid has a filter input field and a table with the following columns: 'Customer Account', 'Sales Opportunity', 'Sales Quote Number', 'Total Amount', 'Tax', 'Final Amount', and 'Status'. The table contains one entry: 'Devcom Limited', 'footwears', 'Q/2020/8/B63WNE9GC', '1,350,000.00', '67,500.00', '1,417,500.00', and 'Pending'. A callout box with the text 'Click on Request for Approval' points to the 'Request for Approval' action in the grid. The grid also shows 'Showing 1 to 1 of 1 entries'.

The system display that the request for approval as been sent successfully

Opportunity : footwears

Expected Amount : 1,350,000.00
Customer Account : Devcom Limited
Expected Close Date : Tuesday, 04 August 2020

Created On : 8/6/2020 | Sales Opportunity Status : Pending

Sales Quote [Back to Sales Qualification](#)

Information - Quote sent for approval successfully!

Filter: Show: 10

Customer Account	Sales Opportunity	Sales Quote Number	Total Amount	Tax	Final Amount	Status	Actions
Devcom Limited	footwears	Q/2020/8/863WNE9GC	1,350,000.00	67,500.00	1,417,500.00	Pending Approval - Junior Approval Role	⋮

Showing 1 to 1 of 1 entries 1

5.3 Product Quotation Approval Pending List

Click on Approvals -> Pending Approval

Click on Approvals

- Sales Management
- Approvals**
- Account Opening Management
- Sales Operations
- Expense Management
- Customer Account

Junior Approval Role | -> click on "Action" icon in the grid in order to approve pending Sales Quote

Online bamisondadi@gmail.com

Sales Quotes Approval - Pending List
View Records

Home / Transaction / Sales Quotes Actions

Sales Quotation Approval - Pending

Filter: Show: 10

Transaction Date	Due Date	Sales Quote Number	Total Amount	Tax	Final Amount	Status	Actions
2020-07-21	07/22/2020	Q/2020/7/10ZB+QQLW	150,000.00	7,500.00	157,500.00	Pending	⋮
8/2/2020	08/04/2020	Q/2020/8/W8M8B1XMK	700,000.00	35,000.00	735,000.00	Pending	⋮
8/4/2020	08/05/2020	Q/2020/8/QDN+PB4MP	900,000.00	45,000.00	945,000.00	Pending	⋮
8/6/2020	08/04/2020	Q/2020/8/B63WNE9GC	1,350,000.00	67,500.00	1,417,500.00	Pending	⋮

Showing 1 to 4 of 4 entries

View Record | Approve Record

Click on Approve Record

The system provide you Sales Quote Approval form


Sales Quotation - View Details

VIEW INFORMATION

Customer Number: C/2020/5/WF8YCW20	Customer Name: Devcom Limited	Sale Opportunity No: 5/2020/8/16806186	Sale Opportunity: footwears
Quote No: Q/2020/8/B63WNE9GC	Sub-Total: 1,350,000.00	Tax: 67,500.00	Total Amount: 1,417,500.00

QUOTE ITEMS

Filter: Show: 10

	Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
	Apple Mac Air	150,000.00	9	1,350,000.00	0.00	1,350,000.00	[Details] [Update] [Remove]

Showing 1 to 1 of 1 entries

Approval Information

* Approval Type:
-- Please Select --

Comments:
Enter your description or notes here

Activate Windows
Go to Settings to activate Windows.

[Back to Pending Approval List](#)
[Approve](#)

Enter the necessary information and click on the Approve button

Sales Quotation - View Details


VIEW INFORMATION

Customer Number : C/2020/5/WR8YCW20 Customer Name : Devcom Limited Sale Opportunity No : 5/2020/8/16806186 Sale Opportunity : footwears

Quote No : Q/2020/8/863WNERGC Sub-Total : 1,350,000.00 Tax : 67,500.00 Total Amount : 1,417,500.00

QUOTE ITEMS

Filter: Show: 10

	Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
	Apple Mac Air	150,000.00	9	1,350,000.00	0.00	1,350,000.00	[Details] [Update] [Remove]

Showing 1 to 1 of 1 entries

Approval Information

* Approval Type : Approved

Comments : TEST

[Back to Pending Approval List](#) [Approve](#)

Activate Windows
Go to Settings to activate Windows.

Click on the Approve button

5.4 Product Quotation Approval Pending List

Click on Approvals -> Pending Approval

Click on Approvals

- Sales Management
- Approvals
- Account Opening Management
- Sales Operations
- Expense Management
- Customer Account

Junior Approval Role II -> click on "Action" icon in the grid in order to approve pending Sales Quote

Online myseunbay@gmail.com

Sales Quotes Approval - Pending List

View Records

Home / Transaction / Sales Quotes

Sales Quotation Approval - Pending

Filter: Type to filter...

Transaction Date	Due Date	Sales Quote Number	Total Amount	Tax	Final Amount	Status	
2020-07-22	07/22/2020	Q/2020/7/FJ4WZ081Y	750,000.00	37,500.00	787,500.00	Pending	
8/6/2020	08/04/2020	Q/2020/8/863WNE9GC	1,350,000.00	67,500.00	1,417,500.00	Pending	

Showing 1 to 2 of 2 entries

View Record Approve Record

Click on the Approve Record

The system provide you Sales Quote Approval form


Sales Quotation - View Details

VIEW INFORMATION

Customer Number : C/2020/5/WF8YCW20	Customer Name : Devcom Limited	Sale Opportunity No : 5/2020/8/16806186	Sale Opportunity : footwears
Quote No : Q/2020/8/863WNE9GC	Sub-Total : 1,350,000.00	Tax : 67,500.00	Total Amount : 1,417,500.00

QUOTE ITEMS

Filter: Type to filter...

	Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
	Apple Mac Air	150,000.00	9	1,350,000.00	0.00	1,350,000.00	[Details] [Update] [Remove]

Showing 1 to 1 of 1 entries

Approval Information

* Approval Type :
-- Please Select --

Comments :
Enter your description or notes here

Back to Pending Approval List Approve

Activate Windows
Go to Settings to activate Windows.

Enter the necessary information and click on the Approve button

Sales Quotation - View Details


VIEW INFORMATION

Customer Number : C/2020/5/WF8YCW20 Customer Name : Devcom Limited Sale Opportunity No : 5/2020/8/16806186 Sale Opportunity : footwears

Quote No : Q/2020/8/B63WNE9GC Sub-Total : 1,350,000.00 Tax : 67,500.00 Total Amount : 1,417,500.00

QUOTE ITEMS

Filter: Show: 10

	Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
	Apple Mac Air	150,000.00	9	1,350,000.00	0.00	1,350,000.00	[Details] [Update] [Remove]

Showing 1 to 1 of 1 entries

Approval Information

* Approval Type :

Comments :

[Back to Pending Approval List](#) [Approve](#)

Click on the Approve button

Activate Windows
Go to Settings to activate Windows.

5.5 Product Quotation Approval Pending List

Click on Approvals -> Pending Approval

Click on Approvals

- Sales Management
- Approvals
- Account Opening Management
- Sales Operations
- Expense Management
- Customer Account

Senior Approval Role I -> click on "Action" icon in the grid in order to approve pending Sales Quote

Sales Quotes Approval - Pending List

Home / Transaction / Sales Quotes

Sales Quotation Approval - Pending

Filter: Type to filter...

Transaction Date	Due Date	Sales Quote Number	Total Amount	Tax	Final Amount	Status	Actions
8/6/2020	08/04/2020	Q/2020/8/863/WNE9GC	1,350,000.00	67,500.00	1,417,500.00	Pending	View Record Approve Record

Showing 1 to 1 of 1 entries

Clickon the Approve Record

The system provide you Sales Quote Approval form


Sales Quotation - View Details

VIEW INFORMATION

Customer Number : C/2020/5/WF8YCW20	Customer Name : Devcom Limited	Sale Opportunity No : 5/2020/8/16806186	Sale Opportunity : footvears
Quote No : Q/2020/8/863/WNE9GC	Sub-Total : 1,350,000.00	Tax : 67,500.00	Total Amount : 1,417,500.00

QUOTE ITEMS

Filter: Type to filter... Show: 10

Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
 Apple Mac Air	150,000.00	9	1,350,000.00	0.00	1,350,000.00	[Details] [Update] [Remove]

Showing 1 to 1 of 1 entries

Approval Information

* Approval Type :
-- Please Select --

Comments :
Enter your description or notes here

Back to Pending Approval List | Approve

Activate Windows
Go to Settings to activate Windows.

Enter the necessary information and click on the Approve button

Sales Quotation - View Details


VIEW INFORMATION

Customer Number : C/2020/5/WF8YCW20 Customer Name : Devcom Limited Sale Opportunity No : S/2020/8/16806186 Sale Opportunity : footwears

Quote No : Q/2020/8/865WN9GC Sub-Total : 1,350,000.00 Tax : 67,500.00 Total Amount : 1,417,500.00

QUOTE ITEMS

Filter: Show: 10

	Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
	Apple Mac Air	150,000.00	9	1,350,000.00	0.00	1,350,000.00	[Details] [Update] [Remove]

Showing 1 to 1 of 1 entries

Approval Information

* Approval Type :

Comments :

[Back to Pending Approval List](#) [Approve](#)

Click on the Approve button

Activate Windows
Go to Settings to activate Windows.

5.6 Product Quotation Approval Pending List

Click on Approvals -> Pending Approval

Click on Approvals

- Sales Management
- Approvals
- Account Opening Management
- Sales Operations
- Expense Management
- Customer Account

Senior Approval Role II-> click on "Action" icon in the grid in order to approve pending Sales Quote

Sales Quotes Approval - Pending List

View Records

Home / Transaction / Sales Quotes

Sales Quotation Approval - Pending

Filter: Type to filter...

Transaction Date	Due Date	Sales Quote Number	Total Amount	Tax	Final Amount	Status	Actions
2020-07-22	07/22/2020	Q/2020/7/FI4WZ081Y	750,000.00	37,500.00	787,500.00	Pending	⋮
8/6/2020	08/04/2020	Q/2020/8/863WNE9GC	1,350,000.00	67,500.00	1,417,500.00	Pending	⋮

Showing 1 to 2 of 2 entries

View Record
Approve Record

Click on Approve Record

The system provide you Sales Quote Approval form


Sales Quotation - View Details

VIEW INFORMATION

Customer Number : C/2020/5/WF8YCW20	Customer Name : Devcom Limited	Sale Opportunity No : S/2020/8/16806186	Sale Opportunity : footwears
Quote No : Q/2020/8/863WNE9GC	Sub-Total : 1,350,000.00	Tax : 67,500.00	Total Amount : 1,417,500.00

QUOTE ITEMS

Filter: Type to filter...

Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
 Apple Mac Air	150,000.00	9	1,350,000.00	0.00	1,350,000.00	Details Update Remove

Showing 1 to 1 of 1 entries

Approval Information

* Approval Type :
-- Please Select --

Comments :
Enter your description or notes here

Back to Pending Approval List | Approve

Activate Windows
Go to Settings to activate Windows.

Enter the necessary information and click on the Approve button


Sales Quotation - View Details

VIEW INFORMATION

Customer Number : C/2020/S/VR8Y/CWC20	Customer Name : Devcom Limited	Sale Opportunity No : S/2020/8/16806186	Sale Opportunity : footevairs
Quote No : Q/2020/8/B63W/NE9GC	Sub-Total : 1,350,000.00	Tax : 67,500.00	Total Amount : 1,417,500.00

QUOTE ITEMS

Filter: Show: 10

Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
 Apple Mac Air	150,000.00	9	1,350,000.00	0.00	1,350,000.00	[Details] [Update] [Remove]

Showing 1 to 1 of 1 entries

Approval Information

* Approval Type :
Approved

Comments :
TEST]

Back to Pending Approval List Approve







Clickon the Approve button

Activate Windows
Go to Settings to activate Windows.

5.7 Product Quotation Approval Pending List

Click on Approvals -> Pending Approval

Clickon Approvals

-  Sales Management
-  Approvals
-  Account Opening Management
-  Sales Operations
-  Expense Management
-  Customer Account

Senior Approval Role III-> click on "Action" icon in the grid in order to approve pending Sales Quote

Sales Quotes Approval - Pending List

Home / Transaction / Sales Quotes

Sales Quotation Approval - Pending

Filter:

Transaction Date	Due Date	Sales Quote Number	Total Amount	Tax	Final Amount	Status	Actions
8/6/2020	08/04/2020	Q/2020/8/863WNE9GC	1,350,000.00	67,500.00	1,417,500.00	Pending	View Record Approve Record

Showing 1 to 1 of 1 entries

Clickon Approve Record

The system provide you Sales Quote Approval form


Sales Quotation - View Details

VIEW INFORMATION

Customer Number : C/2020/5/WF8YCW20	Customer Name : Devcom Limited	Sale Opportunity No. : 5/2020/8/16806186	Sale Opportunity : footwears
Quote No. : Q/2020/8/863WNE9GC	Sub-Total : 1,350,000.00	Tax : 67,500.00	Total Amount : 1,417,500.00

QUOTE ITEMS

Filter:

Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
 Apple Mac Air	150,000.00	9	1,350,000.00	0.00	1,350,000.00	[Details Update Remove]

Showing 1 to 1 of 1 entries

Approval Information

* Approval Type :

Comments :

[Back to Pending Approval List](#)
[Approve](#)

Activate Windows
 Go to Settings to activate Windows.

Enter the necessary information and click on the Approve button


Sales Quotation - View Details

VIEW INFORMATION

Customer Number : C/2020/5/WF8YCW20	Customer Name : Devcom Limited	Sale Opportunity No : S/2020/8/16806186	Sale Opportunity : footwears
Quote No : Q/2020/8/863WNE90C	Sub-Total : 1,350,000.00	Tax : 67,500.00	Total Amount : 1,417,500.00

QUOTE ITEMS

Filter: Show: 10

	Product Name	Price	Quantity	Amount	Discount	Final Amount	Actions
	Apple Mac Air	150,000.00	9	1,350,000.00	0.00	1,350,000.00	[Details] [Update] [Remove]

Showing 1 to 1 of 1 entries

Approval Information

* Approval Type :
Approved

Comments :
[TEST]

Back to Pending Approval List | Approve

Click on the Approve button

Activate Windows
Go to Settings to activate Windows.

0 TOTAL MESSAGES | 0.00 TOTAL SALES EXPENSES | 0 CASES | 0 SALES ACTIVITIES

Sales Opportunity Management

-- Select an Action -- | -- Change Sales Opportunity Status --

Initiate | Qualify | Quote | Negotiate | Close

Click on Create New Product Negotiation

Create New Product Negotiation

Create New Service Negotiation

Previous | Next

Then system provide you Sales Negotiation form

Sales Opportunity : footwears

Customer Account : Devcom Limited | Expected Amount : 1350000 | Expected Close Date : 8/4/2020 12:00:00 AM

Created On : 8/6/2020 | Sales Opportunity Status : Pending

Sales Negotiation - Update

ENTER YOUR INFORMATION

Quote Number : Q/2020/B/B63WNE9GC Amount : 1,417,500.00

* Negotiation Date (MM/DD/YYYY) : Negotiated Amount : Negotiated Outcome :

Feedback : Attendees :

[Back to List](#) [Submit Feedback](#)

Enter the necessary information and click on Submit Feedback

Sales Opportunity : footwears

Customer Account : Devcom Limited | Expected Amount : 1350000 | Expected Close Date : 8/4/2020 12:00:00 AM

Created On : 8/6/2020 | Sales Opportunity Status : Pending

Sales Negotiation - Update

ENTER YOUR INFORMATION

Quote Number : Q/2020/B/B63WNE9GC Amount : 1,417,500.00

* Negotiation Date (MM/DD/YYYY) : Negotiated Amount : Negotiated Outcome :

Feedback : Attendees :

[Back to List](#) [Submit Feedback](#)

Click on the submit Feedback button

The system indicate that negotiation as been successfully made

0 TOTAL MESSAGES

0.00 TOTAL SALES EXPENSES

0 CASES

0 SALES ACTIVITIES

Sales Opportunity Management

-- Select an Action --

-- Change Sales Opportunity Status --

Initiate

Qualify

Quote

Negotiate

Close

Quotes Management

Manage Product Negotiation

Create New Service Negotiation

Date : 08/04/2020 Amount : 1,417,500.00 Outcome : Negotiation Completed

Previous

Next

5.8 Sales Opportunity Management

Sales Closure

Click on Close Sales

0 TOTAL MESSAGES

0.00 TOTAL SALES EXPENSES

0 CASES

0 SALES ACTIVITIES

Sales Opportunity Management

-- Select an Action --

-- Change Sales Opportunity Status --

Initiate

Qualify

Quote

Negotiate

Close

Sales Closure

Quote Number : Q/2020/B/663WNE9GC

Amount : 1,417,500.00

Close Sales

Previous

Submit form

The system provide you Sales Closure form

Sales Opportunity : footwears

Expected Amount : 1,350,000.00 | Customer Account : footwears | Expected Close Date : Tuesday, 04 August 2020

Created On : 8/6/2020 | Sales Opportunity Status : Pending | Sales Lead : | Sales Opportunity No : 5/2020/8/16806186

Sales Closure Back to Sales Qualification

ENTER YOUR INFORMATION

* Closure Status:
 -- Please Select --

* Actual Closed Date (MM/DD/YYYY) :
 Enter Sales Closure Date

Reference Number :
 Enter Reference No

Name of Competitor lost to :
 Name of the competitor

Lost Reason Comments :
 Enter your description or notes here

Back to List | Close Sales

Enter the required information and click on the Close Sales button

Sales Opportunity : footwears

Expected Amount : 1,350,000.00 | Customer Account : footwears | Expected Close Date : Tuesday, 04 August 2020

Created On : 8/6/2020 | Sales Opportunity Status : Pending | Sales Lead : | Sales Opportunity No : 5/2020/8/16806186

Sales Closure Back to Sales Qualification

ENTER YOUR INFORMATION

* Closure Status:
 Sales Won

* Actual Closed Date (MM/DD/YYYY) :
 08/05/2020

Reference Number :
 asdfghjk

Back to List | Close Sales

Click on the Close Sales button

Then the system provide you Sales Opportunity grids which indicate that the Sales Opportunity as been won

Sales Opportunity List

Filter: DEVCOM Show: 10

Customer Account	Opportunity No	Opportunity	Type	Expected Start Date	Expected End Date	Expected Amount	Actual End Date	Actual Amount	Status	Actions
Devcom Limited	5/2020/7/96042081	Diesel Supply	Warm Opportunity	07/22/2020	7/31/2020 12:00:00 AM	350000		0	Pending	
Devcom Limited	5/2020/7/83308811	Gas	Warm Opportunity	07/27/2020	8/1/2020 12:00:00 AM	400000		0	Pending	
Devcom Limited	5/2020/8/74266058	footwears	Hot Opportunity	08/03/2020	8/6/2020 12:00:00 AM	1350000		0	Pending	
Devcom Limited	5/2020/8/16806186	footwears	Hot Opportunity	08/01/2020	8/4/2020 12:00:00 AM	1350000	08/05/2020	1417500	Sales Won	

5.8 Sales Expense

Create Sales Expense->Click on Sales Expense

The screenshot displays the 'Sales Opportunity : Gas supply' management page. At the top, it shows key metrics: 'Expected Amount : 13,000,000.00', 'Customer Account : Billux Nigeria Limited', and 'Expected Close Date : Friday, 24 July 2020'. Below this is a progress bar with stages: 'Initiate', 'Qualify', 'Quote', 'Negotiate', and 'Close'. The 'Initiate' stage is currently active. A dropdown menu is open under the 'Actions' tab, listing options such as 'View Documents', 'Create Activity', 'Manage Activity', 'Create an Expense', 'Manage Expense', and 'Create a Case'. A callout box with an arrow points to the 'Create an Expense' option, with the text 'Click on the create expense button'. A 'Customer Account' section below shows a 'Manage Customer Account - View Account' button and a success message: 'Customer Account created successfully! Customer Account Name : Billux Nigeria Limited.' A watermark 'Activate Windows Go to Settings to activate Windows.' is visible at the bottom right.

The system provide you Sales Expenses form

The screenshot shows the 'Sales Expenses' form within the 'Sales Opportunity : Gas supply' context. The form is titled 'ENTER YOUR INFORMATION' and includes the following fields: 'Sales Expense Title' (with a blurred input), 'Expense Date (MM/DD/YYYY)' (with a calendar icon and 'Enter Expense Date' text), and 'Expense Amount' (with a blurred input). There is an 'Upload Image/Document' section with a 'Choose File' button. A 'Description' field with the placeholder 'Enter your description here' is also present. At the bottom, there is a 'Back to List' button and a 'Submit' button. A callout box with an arrow points to the 'Submit' button, with the text 'Click on the submit button'. A watermark 'Activate Windows Go to Settings to activate Windows.' is visible at the bottom right.

Enter the required information and click on the submit button

Sales Opportunity : Gas supply

Expected Amount : 13,000,000.00 |
 Customer Account : Billux Nigeria Limited |
 Expected Close Date : Friday, 24 July 2020

Created On : 2020-07-07 | Sales Opportunity Status : Pending

Sales Expenses Back to Sales Qualification

ENTER YOUR INFORMATION

Sales Expense Title :

Expense Date (MM/DD/YYYY) : Expense Amount :

Upload Image/Document
 Choose File

Description :

Back to List Submit

Click on the submit button

Sales Opportunity : Gas supply

Expected Amount : 13,000,000.00 |
 Customer Account : Billux Nigeria Limited |
 Expected Close Date : Friday, 24 July 2020

Created On : 2020-07-07 | Sales Opportunity Status : Pending | Sales Lead : | Sales Opportunity No : S/2020/7/19610724

0 TOTAL MESSAGES |
 15,000.00 TOTAL SALES EXPENSES |
 0 CASES |
 0 SALES ACTIVITIES

Sales Opportunity Management -- Select an Action -- | -- Change Sales Opportunity Status --

1 Initiate — 2 Qualify — 3 Quote — 4 Negotiate — 5 Close

Actions

Customer Account

Manage Customer Account - View Account |
 Customer Account created successfully! |
 Customer Account Name : Billux Nigeria Limited .

Then the system provide you Sales Opportunity grids which indicate that the expense has been recorded

Sales Opportunity : Gas supply

Expected Amount : 13,000,000.00
Customer Account : Billux Nigeria Limited
Expected Close Date : Friday, 24 July 2020

Created On : 2020-07-07 | Sales Opportunity Status : Pending

Sales Expense List Create New Expense Back to Sales Opportunity

Filter: Show: 10

Expense No	Expense	Expense Date	Amount	Created On	Status	Actions
E/2020/8/2855257	transportation	Thursday, 06 August 2020	15000	8/6/2020	Pending Approval	⋮

Showing 1 to 1 of 1 entries 1

Opportunity : Gas supply

Expected Amount : 13,000,000.00
Customer Account : Billux Nigeria Limited
Expected Close Date : Friday, 24 July 2020

Created On : 2020-07-07 | Sales Opportunity Status : Pending | Opportunity Number : 5/2020/7/19610724

Sales Expense Detail Back to Pending Sales Expense List

VIEW INFORMATION

Expense Title: transportation	Expense Number: E/2020/8/2855257
Expense Amount: 15000	Expense Date: 8/6/2020
Description :	
UPLOADS	
Uploaded Documents	

5.9 Approval Sales Expense

Click on approval button

Click on sales expense approval

Approvals

Account Opening Management

Sales Operations

Expense Management

Customer Account

SETUP

Corporate Setup

Budget Setup

Product Setup

Service Setup

Sales Setup

Product Pricing

Employee Setup

Logistics Company Setup

Finance Operations Setup

PARTNERS

Partner Management

Account Management

System Administration

Product Quotation Approval

Pending Approval Approved Quotation

Service Quotation Approval

Pending Approval Approved Quotation

Product Discount Approval

Pending Approval Approved Discount

Service Discount Approval

Pending Approval Approved Discount

Sales - Expense Approval

Pending Expense Requests Approved Expenses Rejected Expenses

Sales - Case Management

Pending Cases Resolved Cases

Sales Expense - Pending Approval List

View Records

Home / Sales Management / Sales Expense

Actions

Sales Expense List

Filter: Show: 10

Expense No	Expense	Expense Date	Amount	Created On	Status	Actions
E/2020/7/1529992	Feeding Expense	7/2/2020 12:00:00 AM	150000	2020-07-02	Pending Approval	⋮
E/2020/7/1600140	Feeding Expense	7/2/2020 12:00:00 AM	300000	2020-07-02	Pending Approval	⋮
E/2020/7/3409962	Dinner Outing with CEO	7/15/2020 12:00:00 AM	50000	2020-07-15	Pending Approval	⋮
E/2020/7/6854381	test expense	7/13/2020 12:00:00 AM	150000	2020-07-12	Pending Approval	⋮
E/2020/7/8138993	yomi feeding expense	7/7/2020 12:00:00 AM	300000	2020-07-07	Pending Approval	⋮
E/2020/7/9378335	Feeding Expense	7/21/2020 12:00:00 AM	11500	2020-07-21	Pending Approval	⋮
E/2020/8/2855257	transportation	8/6/2020 12:00:00 AM	15000	8/6/2020	Pending Approval	⋮

Then the system provide you Sales expense- pending approval list

Sales Expense - Pending Approval List
View Records

Home / Sales Management / Sales Expense

Sales Expense List

Filter:

Show: 10

Expense No	Expense	Expense Date	Amount	Created On	Status	Actions
E/2020/7/1529992	Feeding Expense	7/2/2020 12:00:00 AM	150000	2020-07-02	Pending Approval	View Details Review
E/2020/7/1600140	Feeding Expense	7/2/2020 12:00:00 AM	300000	2020-07-02	Pending Approval	
E/2020/7/3409962	Dinner Outing with CEO	7/15/2020 12:00:00 AM	50000	2020-07-15	Pending Approval	
E/2020/7/6854381	test expense	7/13/2020 12:00:00 AM	150000	2020-07-12	Pending Approval	
E/2020/7/8138993	yomi feeding expense	7/7/2020 12:00:00 AM	300000	2020-07-07	Pending Approval	
E/2020/7/9378335	Feeding Expense	7/21/2020 12:00:00 AM	11500	2020-07-21	Pending Approval	
E/2020/8/2855257	transportation	8/6/2020 12:00:00 AM	15000	8/6/2020	Pending Approval	

Click on the review button

Sales Opportunity : Gas supply

Expected Amount : 13,000,000.00 | Customer Account : Billux Nigeria Limited | Expected Close Date : Friday, 24 July 2020

Created On : 8/6/2020 | Sales Opportunity Status : Pending

Sales Expenses

VIEW INFORMATION

Sales Expense Title : transportation

Expense Date (MM/DD/YYYY) : 8/6/2020 | Expense Amount : 15000

Description : Description :

Upload Image/Document

Uploaded Documents

SUBMIT REVIEW

* Approval Status :
-- Please Select --

Notes :
Enter your feedback or notes here

Back to List | Submit

Click on the submit button

Enter the required information and click on the submit button

Sales Opportunity : Gas supply

Expected Amount : 13,000,000.00
Customer Account : Billux Nigeria Limited
Expected Close Date : Friday, 24 July 2020

Created On : 8/6/2020 | Sales Opportunity Status : Pending

Sales Expenses

VIEW INFORMATION

Sales Expense Title : transportation

Expense Date (MM/DD/YYYY) : 8/6/2020 Expense Amount : 15000

Description : Description :

Upload Image/Document

Uploaded Documents

SUBMIT REVIEW

* Approval Status :

Approved

Notes :

approve

[Back to List](#)

 Activate Windows
 Go to Settings to activate Windows.
 [Submit](#)

Click on the submit button

Sales Opportunity : Gas supply

Expected Amount : 13,000,000.00
Customer Account : Billux Nigeria Limited
Expected Close Date : Friday, 24 July 2020

Created On : 2020-07-07 | Sales Opportunity Status : Pending

Sales Expense List
[Create New Expense](#)
[Back to Sales Opportunity](#)

Filter: Show: 10

Expense No	Expense	Expense Date	Amount	Created On	Status	Actions
E/2020/8/2855257	transportation	Thursday, 06 August 2020	15000	8/6/2020	Approved	

Showing 1 to 1 of 1 entries 1

Then the system provide you Sales Opportunity grids which indicate that the expense has been approved

6.0 Sales Case

Click on create case

Sales Opportunity : Gas supply

Expected Amount : 13,000,000.00 | Customer Account : Billux Nigeria Limited | Expected Close Date : Friday, 24 July 2020

Created On : 2020-07-07 | Sales Opportunity Status : Pending | Sales Lead : | Sales Opportunity No : S/2020/7/19610724

0 TOTAL MESSAGES | 15,000.00 TOTAL SALES EXPENSES | 0 CASES | 0 SALES ACTIVITIES

Sales Opportunity Management

1 Initiate | 2 Qualify | 3 Quote | 4 Negotiate | 5 Close

Actions

Customer Account

Manage Customer Account - View Account

Customer Account created successfully!

Customer Account Name : Billux Nigeria Limited.

Click on create

Activate Windows
Go to Settings to activate Windows.

Then the system provide you Case Management form

Sales Opportunity : Gas supply

Expected Amount : 13,000,000.00 | Customer Account : Billux Nigeria Limited | Expected Close Date : Friday, 24 July 2020

Created On : 2020-07-07 | Sales Opportunity Status : Pending

Case Management [Back to Sales Qualification](#)

ENTER YOUR INFORMATION

Case Title :

Incident Date (MM/DD/YYYY) : | Priority : | Severity :

Assigned To :

Description :

[Back to List](#) [Submit](#)

Click on the submit button

Enter the required information and click on the submit button

Sales Opportunity : Gas supply

Expected Amount : 13,000,000.00 | Customer Account : Billux Nigeria Limited | Expected Close Date : Friday, 24 July 2020

Created On : 2020-07-07 | Sales Opportunity Status : Pending

Case Management [Back to Sales Qualification](#)

ENTER YOUR INFORMATION

Case Title :

Incident Date (MM/DD/YYYY) : | Priority : | Severity :

Assigned To :

Description :

[Back to List](#) [Submit](#)

Click on the submit button

After entering the necessary information the system takes you to a page where you are to add Document

Sales Opportunity : Gas supply

Expected Amount : 13,000,000.00 | Customer Account : Billux Nigeria Limited | Expected Close Date : Friday, 24 July 2020

Created On : 2020-07-07 | Sales Opportunity Status : Pending

Case Title : sick

Case Management - Attachment

ENTER YOUR INFORMATION

Document Title :

Upload Image/Document

No file selected [Choose File](#)

Description :

Enter your description here

[Back to List](#) [Submit](#)

Enter the required Document and click on the submit button

Sales Opportunity : Gas supply

Expected Amount : 13,000,000.00 | Customer Account : Billux Nigeria Limited | Expected Close Date : Friday, 24 July 2020

Created On : 2020-07-07 | Sales Opportunity Status : Pending

Case Title : sick

Case Management - Attachment

ENTER YOUR INFORMATION

Document Title :

Hospital receipt

Upload Image/Document

iTunes Software License.rtf [Choose File](#)

Description :

bad

[Back to List](#) [Submit](#)

Click on the submit button

The system indicates that the Information-Record was added successfully shown below

Sales Opportunity : Gas supply

Expected Amount : 13,000,000.00
Customer Account : Billux Nigeria Limited
Expected Close Date : Friday, 24 July 2020

Created On : 2020-07-07 | Sales Opportunity Status : Pending

Case Title : sick

Sales - Case Attachment List Create New Attachment View Case Back to Sales Opportunity

Information - Record added successfully!

Filter: Show: 10

Case Number	Case Title	Document Title	Created On	Status	Actions
Case/2020/8/359267372	sick	Hospital receipt	8/6/2020	Uploaded	⋮

Showing 1 to 1 of 1 entries

Click on Manage Case to view details shown below

Sales Opportunity : Gas supply

Expected Amount : 13,000,000.00
Customer Account : Billux Nigeria Limited
Expected Close Date : Friday, 24 July 2020

Created On : 2020-07-07 | Sales Opportunity Status : Pending | Sales Lead : | Sales Opportunity No : S/2020/7/19610724

0 TOTAL MESSAGES 15,000.00 TOTAL SALES EXPENSES 1 CASES

Sales Opportunity Management

Initiate → Qualify → Quote → Negotiate → Close

Actions

- Manage Customer Account - View Account
- Customer Account created successfully!
- Customer Account Name : Billux Nigeria Limited .

Activate Windows
Go to Settings to activate Windows.

Click on manage cases

Click on the View Details in the "Action" grid in order to update

Sales Opportunity : Gas supply

Expected Amount : 13000000
Customer Account : Billux Nigeria Limited
Expected Close Date : 7/24/2020 12:00:00 AM

Created On : 2020-07-07 | Sales Opportunity Status : Pending

Sales - Case Management List Create New Case Back to Sales Opportunity

Filter: Show: 10

Case Number	Case Title	Incident Date	Priority	Severity	Closed Date	Assigned To	Created On	Status	Actions
Case/2020/8/359267372	sick	8/6/2020 12:00:00 AM	Critical	Moderate	1/1/0001 12:00:00 AM	Back Office	8/6/2020	Pending	<ul style="list-style-type: none"> View Details Edit Record

Showing 1 to 1 of 1 entries

Click on the view detail

Click on the view Attachment button in order to view if the case is uploaded

Sales Opportunity : Gas supply

Expected Amount : 13,000,000.00
Customer Account : Billux Nigeria Limited
Expected Close Date : Friday, 24 July 2020

Created On : 2020-07-07 | Sales Opportunity Status : Pending

Case Title : sick

Sales - Case Management Detail Back to Case Management List Back to Sales Qualification

VIEW INFORMATION

Number : Case/2020/8/359267372	Case Title : sick ViewBag.OpenDate	Incident Date : Thursday, 06 August 2020
Priority : Critical	Severity : Moderate	Closed Date :
Assigned To : Back Office	Escalated To :	Escalated On :
Status : Pending	Is Due? :	Assigned By : mystunbay@gmail.com
Created On : 8/6/2020		

Description : sick

VIEW ATTACHMENT(S)

[View Attachment\(s\)](#)

Click on the View Attachment button

The system provide you Case Management uploaded grid shown below

Sales Opportunity : Gas supply

Expected Amount : 13,000,000.00

Customer Account : Billux Nigeria Limited

Expected Close Date : Friday, 24 July 2020

Created On : 2020-07-07 | Sales Opportunity Status : Pending

Case Title : sick

Sales - Case Attachment List

Create New Attachment

View Case

Back to Sales Opportunity

Filter:

Show:

Case Number	Case Title	Document Title	Created On	Status	Actions
Case/2020/8/359267372	sick	Hospital receipt	8/6/2020	Uploaded	⋮

Showing 1 to 1 of 1 entries

1