Pulse Sales

Administrative User Guide

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1. INTRODUCTION TO SALES

Using proven sales methodology, the PULSE Sales module is designed to streamline the sales cycle and provide you with the tools to better manage your sales team and your sales opportunities.

Since PULSE modules share a common data platform, as a sales person, you have access to valuable information about your customer. For example, equipment and service history; information that can lead to further sales opportunities. PULSE Sales maximises your time by scheduling tasks and reminders, assisting to prioritise and refine your efforts. Quotations and proposals form part of the integrated package.

All of this fortifies pro-active management of both existing and new customer relationships and in turn increases sales-force productivity and bottom-line results. From a manager's viewpoint, the sales pipeline, or funnel, can be analysed in terms of groups such as sales-person, team, market sector, or value. This provides critical inputs into the planning cycle, and gives you a valuable tool for accurate forecasting and productivity reports.

2. A FEW BASICS

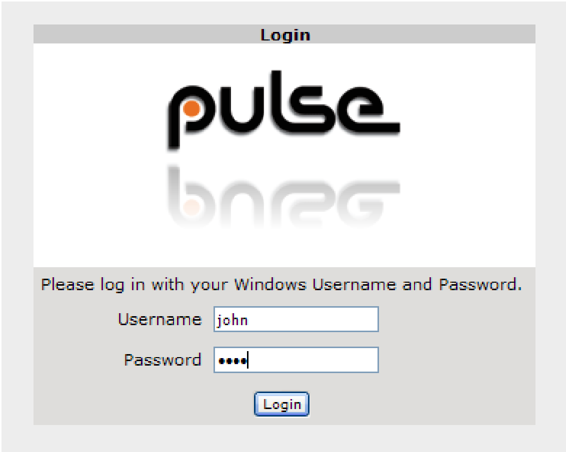
2.1 Terminology

The below mentioned terms are explained in more detail in the user guide:

- **Opportunity** - a sales lead or potential sale
- **Task** - an activity to do related to sales lead that must be performed by someone
- **Status** - the lead can be live (active) or stagnating(inactive) or dead (lost)
- **Stage** - the progress a lead makes from when first identified to becoming a won deal
- **Stage Conditions** - conditions that must be met before allowing a lead to progress from one stage to another
- **Sales Pipeline** - funnel or graph depicting the quantity (and value) of leads by stage

2.2 Logging onto Pulse

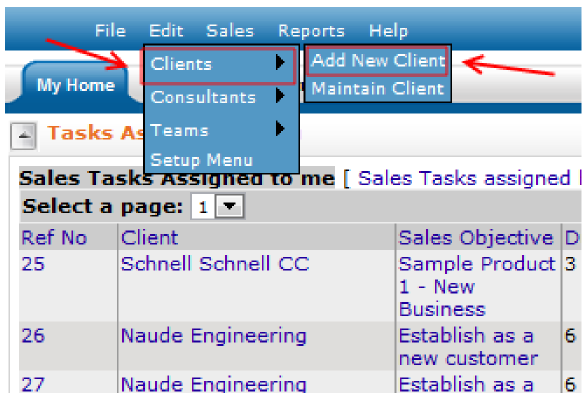
Using your Sales web address, log onto Pulse using an internet browser.
(Your Pulse consultant will give this to you.)



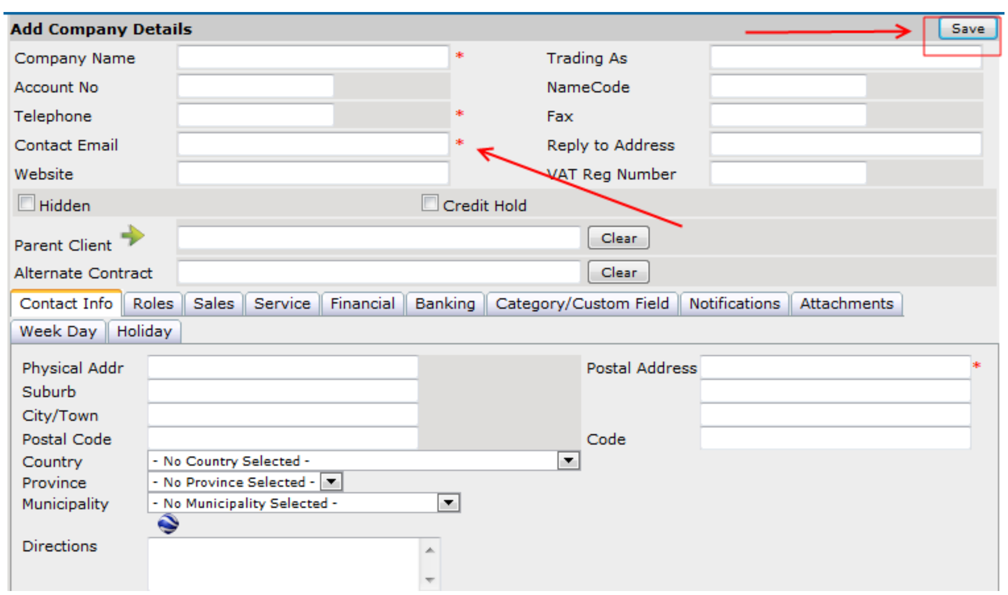
Log on using your allocated user name and password.
Your password can be changed once you are logged in.

3. ADDING & MAINTAINING CLIENTS

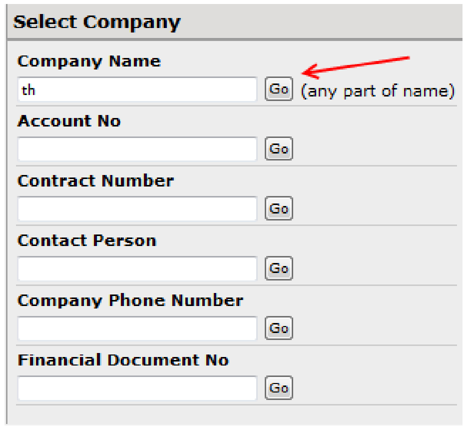
To add a client, click “Edit” on your top menu, select “Clients” and “Add New Client”:



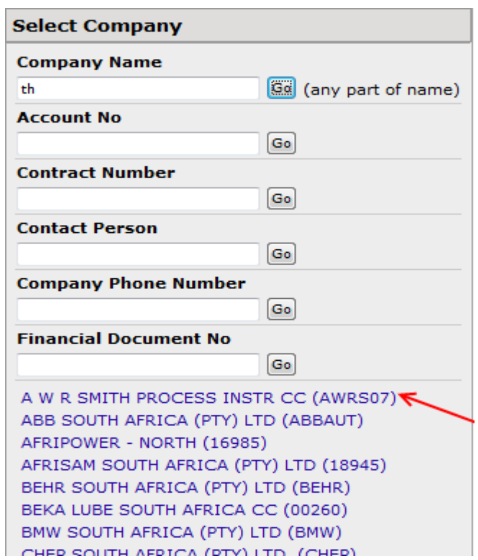
Fill in all the necessary client information and click “Save”:



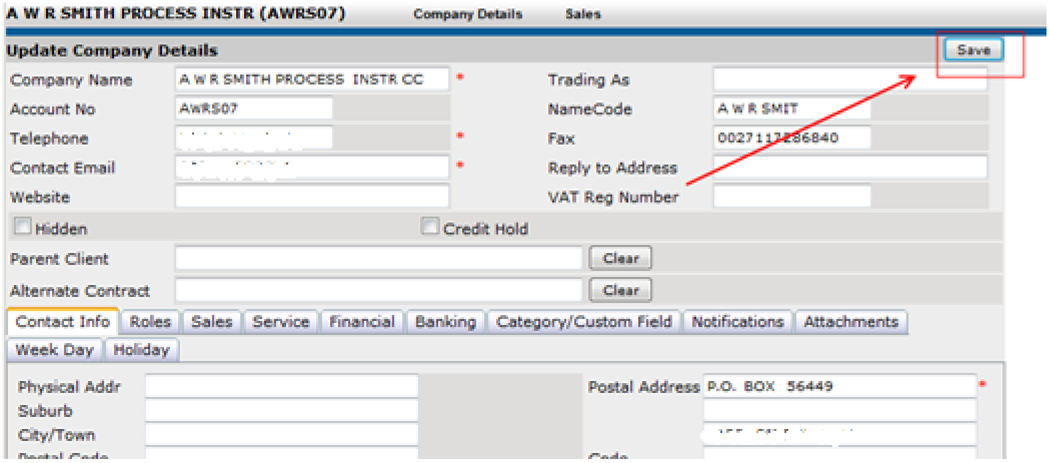
To maintain a client, follow the same steps as above for adding a client, except this time click "Maintain Client". Type in any part of the company name and client "Go":



Select the client that needs changes made to it:

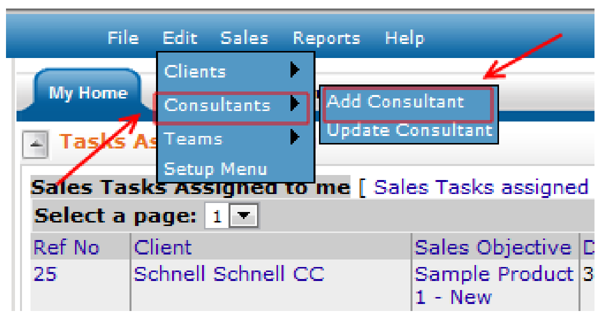


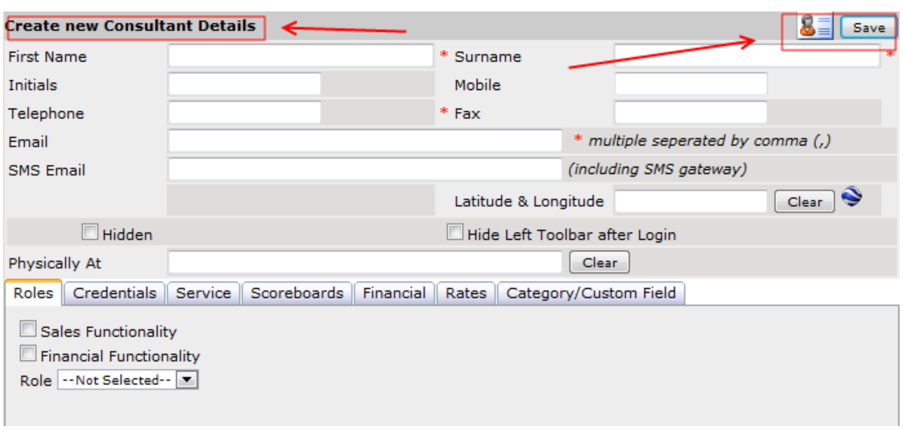
Click on the blue arrow to get to the client details. Make the necessary changes and client "Save":



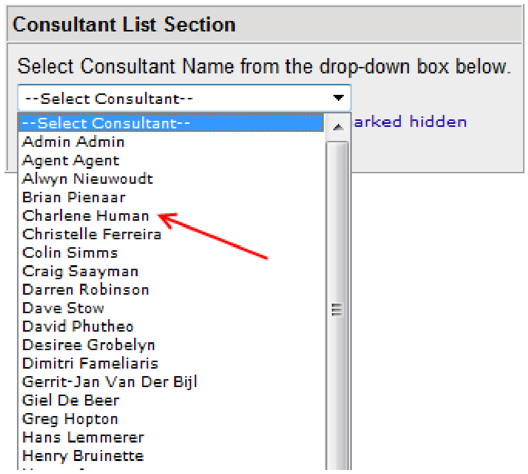
4. ADDING & MAINTAINING TEAM MEMBERS

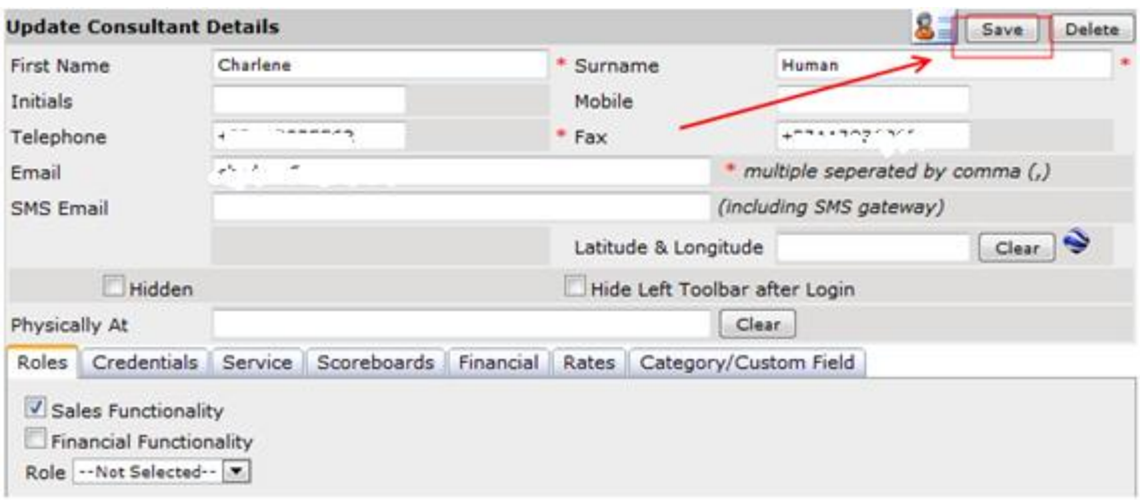
Select "Edit" from your top menu, scroll down to "Consultants" and select either "Add Consultant" or "Update Consultant". Add the necessary information or amend information and click "Save":





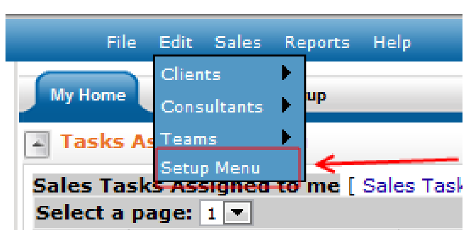
Select the Consultant that needs to be maintained and make the necessary changes and client "Save" (see diagrams on next page):



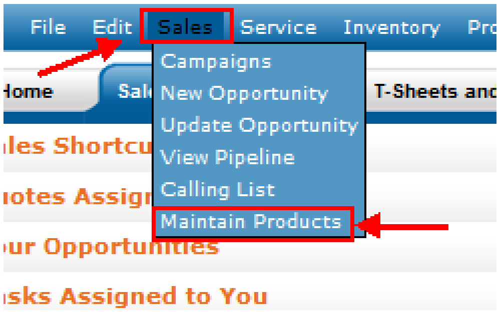


5. ADDING & MAINTAINING PRODUCTS

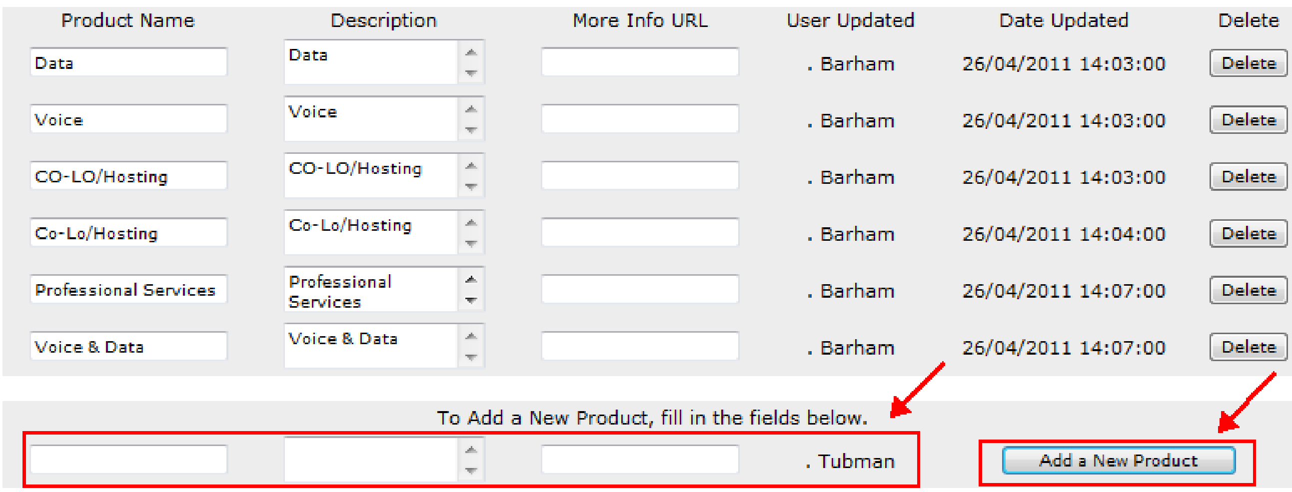
Step 1:
Select “Edit” from your top menu and then click on “Setup Menu”



Step 2:
Select the "Sales" tab and then select "Maintain Products"

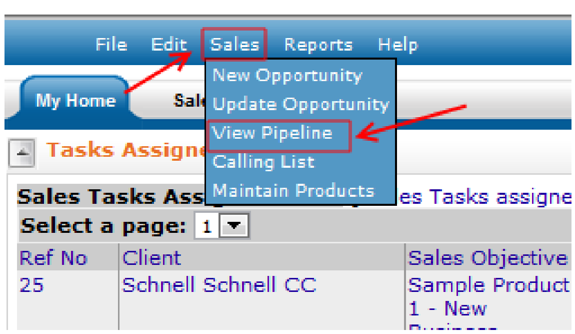


Step 3:
Fill in the new product information and click "Add a new Product



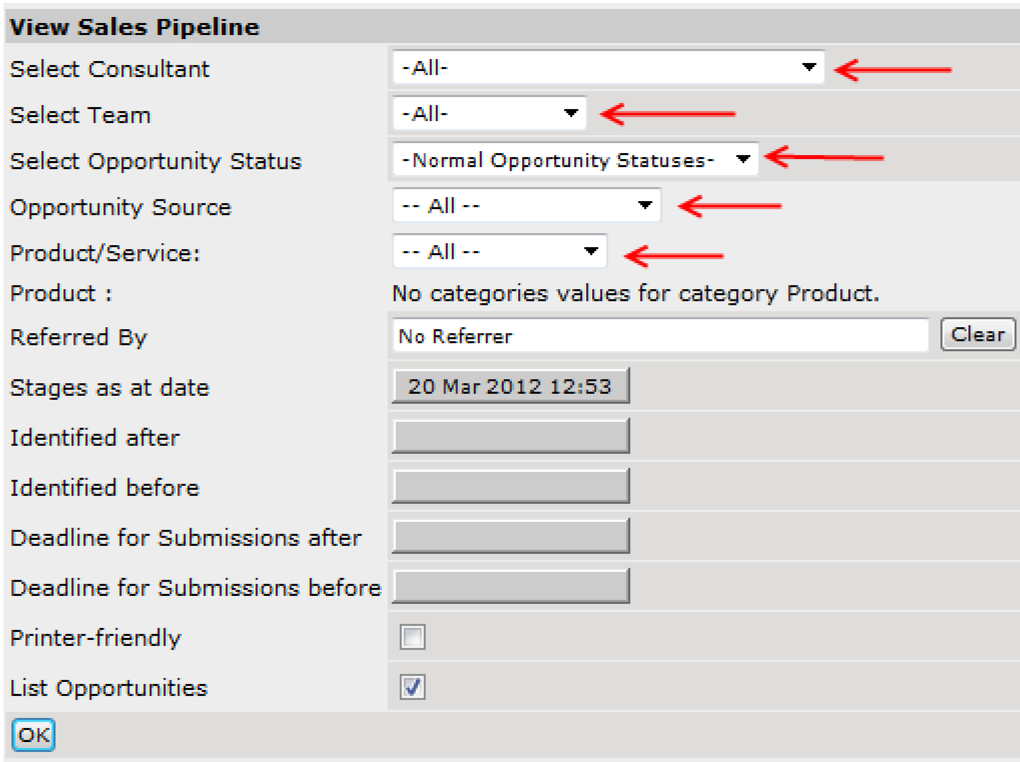
6. VIEWING & USING THE SALES PIPELINE

Select "Sales" from your top menu and then scroll down to "View Pipeline":

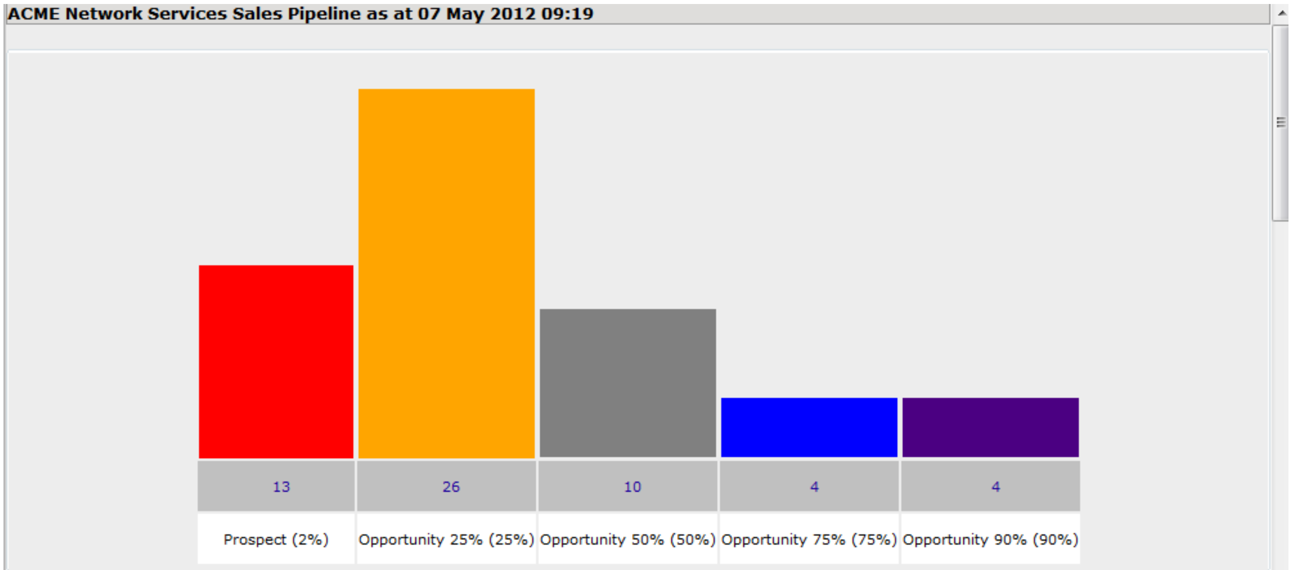


The following will come up on your screen:

(Use the various drop down boxes to filter your pipeline or alternatively leave them as "All" to get a more comprehensive Sales Pipeline).



The below screen will populate, from here you can go into the various opportunities to see the relative information pertaining to the sales opportunity that you have selected:



Opportunities

Ref No	Client	Identified On	Expected Close	Sales Objective	Average Rating	Total Contract Value	Source	Consultant	Open Task
Stage: Prospect (13)									
18	sample client 1707	9 February 2011	28 February 2011	Deliver project/offering 18	0%	£ 83,000.00	Employee Referral	Amy Walters	
32	sample client 1728	3 March 2011	30 September 2011	Deliver project/offering 32	0%	£ 0.00	Partner / Channel	Amy Walters	
116	sample client 1800	5 May 2011		Deliver project/offering 116	0%	£ 320,000.00	Partner / Channel	Paula Abdul	
118	sample client 1801	5 May 2011		Deliver project/offering 118	0%	£ 45,000.00	Partner / Channel	Paula Abdul	