



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.)

Login



Please log in with your Windows Username and Password.

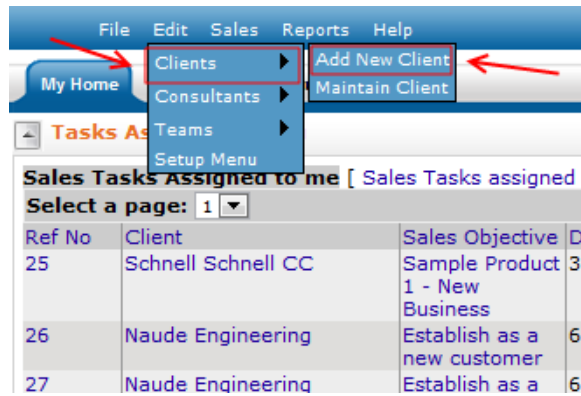
Username

Password

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":



The screenshot shows a menu bar with 'File', 'Edit', 'Sales', 'Reports', and 'Help'. The 'Edit' menu is open, showing 'Clients', 'Consultants', 'Teams', and 'Setup Menu'. The 'Clients' sub-menu is also open, showing 'Add New Client' and 'Maintain Client'. Red arrows point to the 'Clients' menu item and the 'Add New Client' option.

Ref No	Client	Sales Objective	D
25	Schnell Schnell CC	Sample Product 1 - New Business	3
26	Naude Engineering	Establish as a new customer	6
27	Naude Engineering	Establish as a	6

Fill in all the necessary client information and click "Save":

Add Company Details

Company Name * Trading As

Account No NameCode

Telephone * Fax

Contact Email * Reply to Address

Website VAT Reg Number

Hidden Credit Hold

Parent Client

Alternate Contract

Week Day

Physical Addr Postal Address *

Suburb

City/Town

Postal Code

Country - No Country Selected -

Province - No Province Selected -

Municipality - No Municipality Selected -

Directions

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 Company

Company Name
 (any part of name)

Account No

Contract Number

Contact Person

Company Phone Number

Financial Document No

Select the client that needs changes made to it:

Select Company

Company Name
 (any part of name)

Account No

Contract Number

Contact Person

Company Phone Number

Financial Document No

A W R SMITH PROCESS INSTR CC (AWRS07)
 ABB SOUTH AFRICA (PTY) LTD (ABBAUT)
 AFRIPower - NORTH (16985)
 AFRISAM SOUTH AFRICA (PTY) LTD (18945)
 BEHR SOUTH AFRICA (PTY) LTD (BEHR)
 BEKA LUBE SOUTH AFRICA CC (00260)
 BMW SOUTH AFRICA (PTY) LTD (BMW)
 CHEP SOUTH AFRICA (PTY) LTD (CHEP)

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

A W R SMITH PROCESS INSTR (AWRS07) **Opportunities** **Sales Tasks & Updates** **Quotes**

Opportunities [Show All Opportunities, including Old, Dormant and Dead]

Contact Person required to add an Opportunity.

Identified On	Ref No	Sales Objective	Average Rating	Stage	Status
Add New Opportunity					

A W R SMITH PROCESS INSTR (AWRS07) Company Details Sales

Update Company Details

Company Name: A W R SMITH PROCESS INSTR CC * Trading As:

Account No: AwRS07 NameCode: A W R SMIT

Telephone: * Fax: 0027117286840

Contact Email: * Reply to Address:

Website: VAT Reg Number:

Hidden Credit Hold

Parent Client:

Alternate Contract:

Contact Info Roles Sales Service Financial Banking Category/Custom Field Notifications Attachments

Week Day Holiday

Physical Addr: Postal Address: P.O. BOX 56449 *

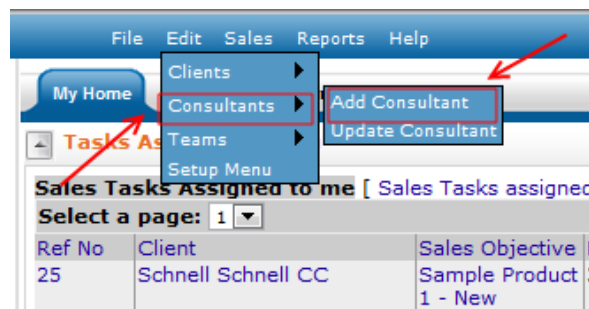
Suburb:

City/Town:

Postal Code:

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":



Create new Consultant Details

First Name: * Surname:

Initials: Mobile:

Telephone: * Fax:

Email: * multiple seperated by comma (,)

SMS Email: (including SMS gateway)

Latitude & Longitude:

Hidden Hide Left Toolbar after Login

Physically At:

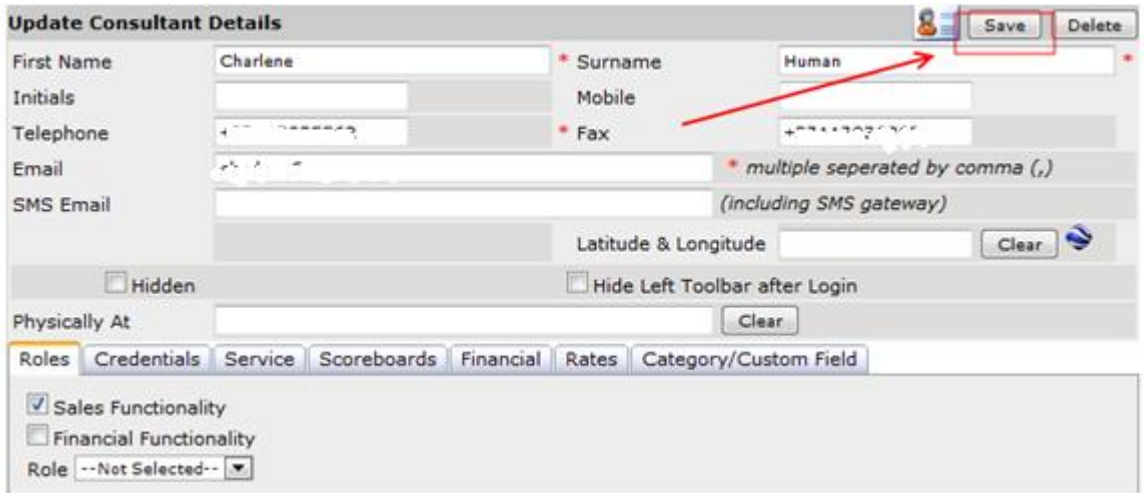
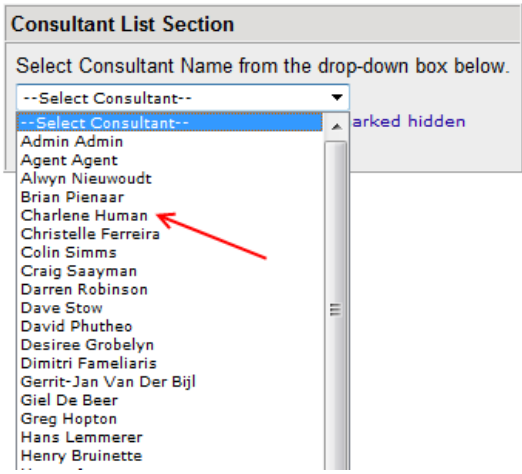
Roles Credentials Service Scoreboards Financial Rates Category/Custom Field

Sales Functionality

Financial Functionality

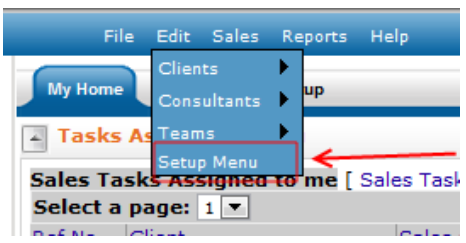
Role: --Not Selected--

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



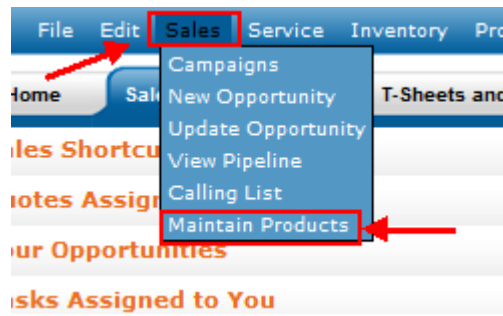
5. ADDING & MAINTAINING PRODUCTS

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



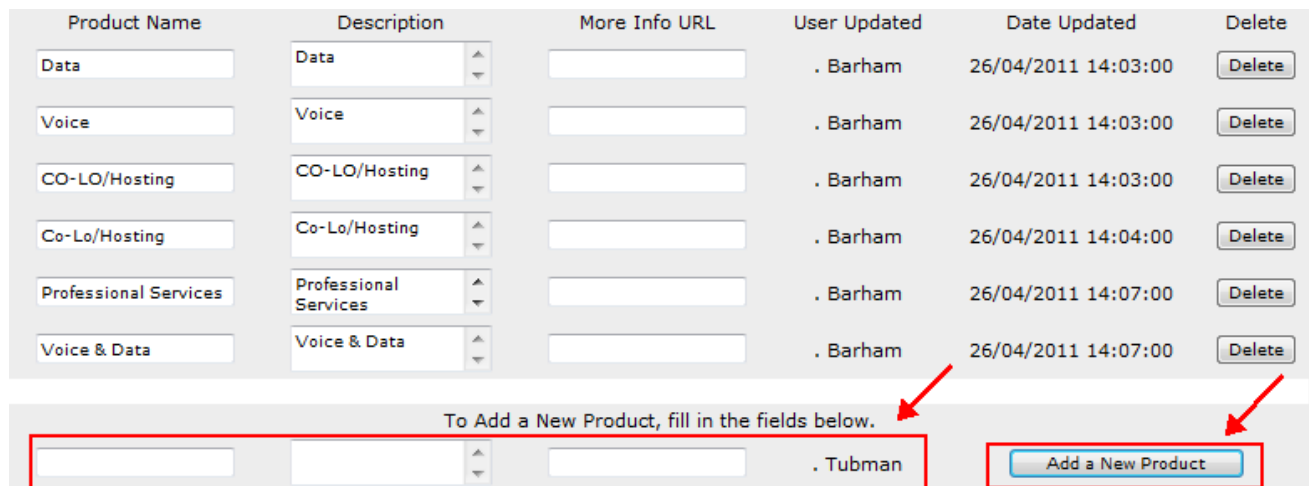
Step 2:

Select the "Sales" tab and then select "Maintain Products"



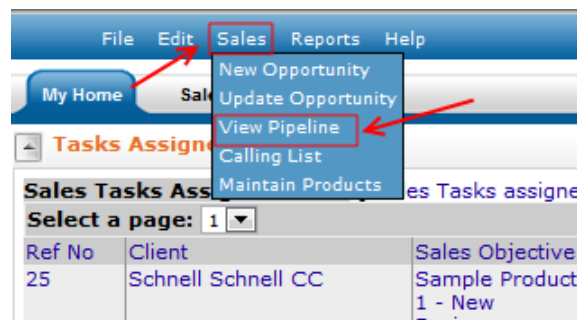
Step 3:

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



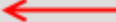



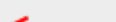
6. VIEWING & USING THE SALES PIPELINE

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).

View Sales Pipeline	
Select Consultant	-All- 
Select Team	-All- 
Select Opportunity Status	-Normal Opportunity Statuses- 
Opportunity Source	-- All -- 
Product/Service:	-- All -- 
Product :	No categories values for category Product.
Referred By	No Referrer <input type="button" value="Clear"/>
Stages as at date	20 Mar 2012 12:53
Identified after	<input type="text"/>
Identified before	<input type="text"/>
Deadline for Submissions after	<input type="text"/>
Deadline for Submissions before	<input type="text"/>
Printer-friendly	<input type="checkbox"/>
List Opportunities	<input checked="" type="checkbox"/>
<input type="button" value="OK"/>	

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:

