Sale/Lead Management

Sale/Lead Management is the main entry point into the sales pipeline. A User can create and capture Sales or prospective Lead details and conduct a variety of operations to track a lead to its conclusion.
When a User selects Sale/Lead Management menu button, they are presented with 2 tables of Sales/Leads. The first lists Open Sales/Leads and the other, Closed Sales/Leads.
The User has 4 options when viewing Sales/Leads. They are:
- View My Sales/Leads for selected Account
- View all My Sales/Leads
- View all Sales/Leads for selected Account
- View all Sales/Leads
Note: If the User has not previously selected an Account to work with, the Accounts table is first presented for the User to select from.

1. View My Sale/Leads for a selected Account

The View Sales/Leads screen is displayed when the Sale/Lead Management menu button is selected.

This is the default view.

The User is presented with 2 tables - Open and Closed Sales/Leads. These Sales/Leads represent entries where the User is the Sale/Lead Owner for the current/selected Account.

2. View all My Sale/Leads

The User can select this option from the View Sale/Leads screen.

The User is presented with 2 tables - Open and Closed Sales/Leads. These Sales/Leads represent entries where the User is the Sale/Lead Owner for all Accounts.

3. View all Sales Leads for a selected Account

There are 2 methods of viewing this information:

The User can select this option from the View Sale/Leads screen.

The User is presented with 2 tables - Open and Closed Sales/Leads. These Sales/Leads represent entries for the current/selected Account.

The User can view a summary of Sales/Leads via the View Account screen: Sales tab - view all Sales/Leads associated to an Account

Refer View an Account section.

4. View all Sales/Leads (for all Accounts)

The User can select this option from the View Sale/Leads screen.

The User is presented with 2 tables - Open and Closed Sales/Leads. These Sales/Leads represent entries for all Accounts that the user has permissions to view.

5. View all Sales for a Contact

The User can view a summary of Sales/Leads via the View Contact screen: Sales tab - view all Sales/Leads associated with a Contact

Refer View a Contact section.

6. View all Sales/Leads for a particular Product

The User can view a summary of Sales/Leads via the View Product screen: Sales tab - view all Sales/Leads for a Product

Refer View a Product section.

7. View Sale/Lead History

The User can view a summary of Sales/Leads History via the View Sale/Lead screen: History tab - view Sale/Lead History

Refer View a Sale/Lead section.

8. Search for a Sale/Lead

There are 2 methods to search for a Sale/Lead. The first is on the Banner Section using the Global Search function. Refer Global Search section.

The other method offers more fields and options to refine the search and can be accessed by selecting Sale/Lead Management from the Menu Bar and select Search Sale/Lead from the Left Menu Section.

The User can search for a Sale/Lead or a list of Sales/Leads by filtering on the following criteria:

- Account name
- Sale/Lead ID
- Product name
- Unit price range (from - to)
- Number of Units range (from - to)
- Amount range (from - to)
- Sale status
- Probability range (from - to)
- Created by (who created the Sale/Lead)
- Owner (who owns the Sale/Lead)

These tables will only display Sales/Leads related to Accounts which the User has permissions to View.

If access is needed for an Account that is not in this list, contact the application Administrator to change the Users privileges.

9. Create a Sale/Lead

When a Sale/Lead is created it must be associated with a Contact.

This means there must be at least one Contact associated to the Account. Refer to Add a Contact to Accounts section. The User will be presented with a list of Contacts to choose from.

All required fields are in **bold**

Fields	Description
Contact	Customer contact
External Ref.	External reference code
Invoice No.	Invoice number
Product	Product name
Status	Sale pipeline status
No. of Units	Number of units

Unit Price	Unit price -automatically populated when Product is selected
Tax	Tax amount
Discount	Discount amount
Disc. Reason	Discount reason
Amount	Total amount
Owner	Owner/Salesperson
Reason closed	Closed reason
Closed date	Date closed
Estimated Close Date	Estimated close date of the Lead. Used for forecasting.
Probability	Probability of sale closure. Used for forecasting.
Last Contact	Date last contacted
Competitor	Competitor name
Comp. details	Competitor details

Table 1:

Depending on the Users privileges, this function may not be available. If access is needed, contact the application Administrator to change the Users privileges.

10. View a Sale/Lead

Sale/Lead details can be displayed by selecting (clicking) Sale ID link (where Sale ID is underlined) which is available on most screens or from the View Sale/Leads tables (displayed when Sale/Lead Management action is selected).

Depending on the Users privileges, this function may not be available. If access is needed, contact the application Administrator to change the Users privileges.

10.1. Follow Ups tab

Follow Ups tab - view all Sale/Lead Follow Ups

Displays:

- Action required

- Date to action
- Status
- Priority

10.2. Expenses tab

Expenses tab - view all Expenses for a Sale/Lead

Displays:

- Expense amount
- Invoice number
- Description
- Reimbursed indicator
- Budget Centre

10.3. History tab

History tab - view Sale/Lead History

Displays:

- User that made the change
- Date and time change was made
- Field/Item that was changed
- Old value
- New value

10.4. Notes tab

Notes tab - view all Sale/Lead Notes

Displays:

- Date Note was created
- Date Note was updated
- Short description
- View/Edit/Delete operations

11. Edit a Sale/Lead

This function is accessible from the Left Menu Section. It allows the User to change and update any Sale/Lead details.

Depending on the Users privileges, this function may not be available. If access is needed, contact the application Administrator to change the Users privileges.

12. Delete a Sale/Lead

Depending on the Users privileges, this function may not be available. If access is needed, contact the application Administrator to change the Users privileges.

13. Create a Follow Up

A Follow Up is similar to a To Do but is related directly with an Account. Like a To Do a User can create it but assign it to another User to action.

This function is available in the Left Hand Menu when a User is viewing or editing a Sale/Lead.

14. Edit/Update a Follow Up

Follow Up details can be edited or updated by selecting it from the Follow Up tab in the View Sale/Lead screen.

15. Re-assigning a Follow Up

A Follow Up can be re-assigned to another User by selecting it from the Follow Up tab in the View Sale/Lead screen and updating the Assignee item.

16. Close a Follow Up

A Follow Up can be closed by selecting it from the Follow Up tab in the View Sale/Lead screen and updating the Status indicator.

17. View all Sale/Lead Follow Ups

The User can view a summary of Follow Ups via the View Sale/Lead screen: Follow Ups tab - view all Sale/Lead Follow Ups

18. Add a Sale/Lead Note

Notes can be used to store additional or background information. The User can create a Note by selecting the Add Note link in the Left Menu Section.

19. Delete a Sale/Lead Note

This operation is only accessible from the View Sale/Lead screen.

To perform this action:

- Select View Sale/Lead function to access the tabs (below Sale/Lead details)
- Select the Notes tab to access the operations View, Edit, and Delete
- Select Delete

20. View all Sale/Lead Notes

The User can view a summary of Notes via the View Account screen: Notes tab - view all Notes associated with an Account

Refer View a Sale/Lead section.

21. Create an Expense

This function is available in the Left Hand Menu section when viewing or editing a Sale/Lead. When creating an Expense in this manner, the Expense is automatically associated with the Sale/Lead.

All required fields are in **bold**

Field	Description
Sale	Sale/lead ID
Amount	Expense amount
Description	Description of expense
Tax deductible	Tax deductible indicator
Tax	Tax amount
Reimbursed	Reimbursed indicator
Ext. Ref.	External reference
Invoice No.	Invoice number
Charge Code	
Budget Centre	

Table 1:

Depending on the Users privileges, this function may not be available. If access is needed, contact the application Administrator to change the Users privileges.

22. View all Expenses for an Account

The User can view a summary of Expenses via the View Account screen: Expenses tab - view all Expenses associated with an Account

Refer View an Account section.

23. View all Expenses for a Sale/Lead

The User can view a summary of Expenses via the View Sale/Lead screen: Expenses tab - view all Expenses associated with an Sale/Lead

Refer View a Sale/Lead section.