



**Course 1**  
**With Opportunity Tracking**

# Training

Time: 2 hours

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## 1. System Overview

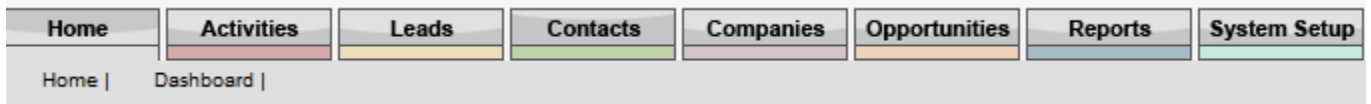
When you login you will land on the Home page.

The screenshot shows the BluWave CRM Home page. At the top, there is a navigation bar with tabs for Home, Activities, Leads, Contacts, Companies, Opportunities, Reports, and System Setup. A trial expiration notice is displayed: "You have 19 days left until your trial expires. Please click here to purchase". The main dashboard is divided into several sections:

- Search:** A search box with a "Search" button and a "Within" dropdown menu.
- Quick Create:** A "Quick Create" button with a plus icon and a dropdown menu.
- Calendar:** A calendar view for April 2011, showing dates from 1 to 30.
- Appointments for 0001/01/01:** A section showing "No Data to Display" with links for "Go to Diary Planner" and "To do list".
- Tasks for 0001/01/01:** A section showing "No Data to Display" with links for "Go to Diary Planner" and "To do list".
- Recent Opportunities:** A table listing recent opportunities with links to view them.
- New Leads:** A table listing new leads with links to view them.
- Recent Companies:** A list of recently added companies with links to view them.
- Pipeline for January:** A section showing "No Data to Display".

You can navigate to appointments, tasks, and opportunities from here. You can also view companies added recently and view a graphic display of your pipeline.

Use the buttons at the top of the page to navigate.



## Dashboard

Home | Dashboard | Version 1.0

Please Select Dashboard View: Sales Representative

**Search**

Search

Within

**Quick Create**

**Calendar**

**Pipeline for April**

- ▼ Lead R 910,000
- ▼ First Demonstration R 470,000
- ▼ Quoted R 340,000
- ▼ Verbal Order R 180,000

**Leads By Source**

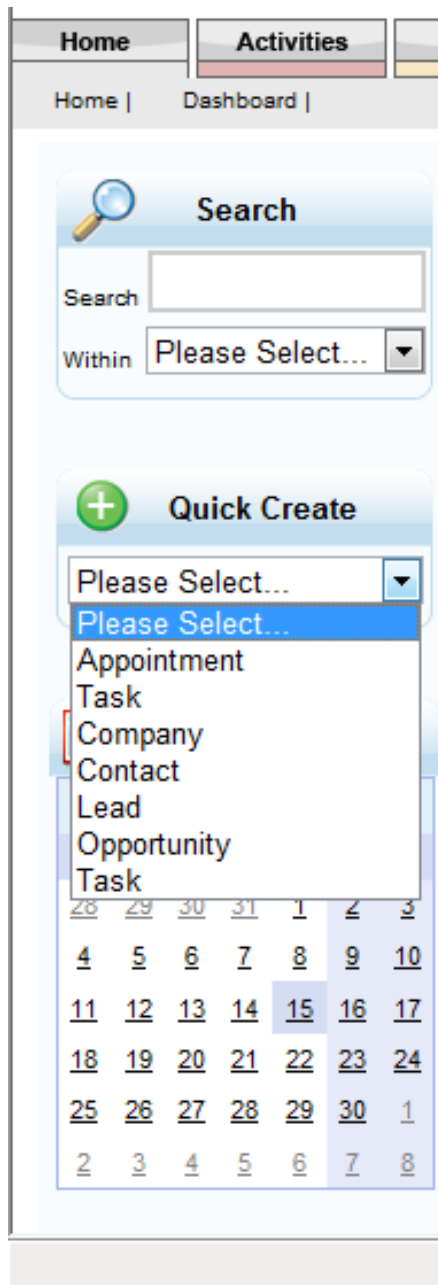
- Cold Call: 43%
- Google AD Words: 29%
- Walk in: 14%
- Internet: 14%

**Top 10 Opportunities for April**

Spectrum Distribution	R 340,000.00	20
Spectrum Distribution	R 330,000.00	10
First Technologies	R 325,000.00	10
Diamond Products	R 250,000.00	20
Abaous Computing	R 240,000.00	50
CC Imelmann Labs	R 180,000.00	80
CC Imelmann Labs	R 100,000.00	45
First Technologies	R 100,000.00	20
BluWave Software	R 30,000.00	80
SuperWave	R 5,000.00	10

**Actual vs Target for April**

Tania: Actual R 60,000, Target R 50,000.00



You can use Quick Create to jump to the relevant screen to create a new Appointment, Task, Company, Contact, Lead or Opportunity.

## 2. View Companies



### Use View Companies Screen to:

- Search for the company name to view the details of that client.
- Add new Clients to the database. Note: Only Administrators can delete Clients from the database.

**View Companies**

Search   Filter

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z |

<u>Company Name</u>	<u>Acc No</u>	<u>Cat</u>	<u>Type</u>	<u>Industry</u>	<u>Area</u>	<u>Sales Rep</u>	<u>Created</u>
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">BluWave Software</a>		P	A Type	Chemicals	JHB - Western Suburbs	Tania	04/04/2011

Click on the Company name to edit that company or click on the word Edit.  
Click on the work Delete to remove the company from the database.

## Edit Company

**Edit Company** [Update] [Cancel] [Print Card]

**Company Detail**

Company Name	<input type="text" value="BluWave Software"/>	Account Number	<input type="text"/>
Sales Staff	<input type="text" value="Tania"/>	Date Opened	<input type="text" value="04/04/2011"/>
Category	<input type="text" value="Prospect"/>	Website	<input type="text"/>
Type	<input type="text" value="A Type"/>	User Defined 1	<input type="text" value="0"/>
State	<input type="text" value="Active Customer"/>	User Defined 2	<input type="text" value="0"/>
Source	<input type="text" value="Internet"/>	User Defined 3	<input type="text"/>
Industry	<input type="text" value="Chemicals"/>	User Defined 4	<input type="text"/>
Area	<input type="text" value="JHB - Western Suburbs"/>	User Defined 5	<input type="text"/>
		User Defined 6	<input type="text"/>

**Contacts** [New]  
**Scheduled Activities** [New]  
**Completed Activities** [New]  
**Opportunities** [New]

- Make the necessary changes to the company details and click the Update button.
- You can view the contacts, activities and opportunities assigned to this company by clicking on the down arrow.
- You can also add new contacts, activities and opportunities by clicking on the word New.

## Add Company



Click on Add New Company to add a new prospect or customer.

**Add Company**

Company Name  \*

Sales Staff

Category

Type

State

Source

Industry

Area

Account Number

Date Opened

Website

User Defined 1

User Defined 2

User Defined 3

User Defined 4

User Defined 5

User Defined 6

Save Save & New Cancel

- Indicate whether this Client is a Prospect or a Customer .by using the category field
- There are 6 user defined fields. These fields are indicated and set-up by your Administrator.
- NB! Categorise a client database using the category field. Customers should be broken down by value or potential value into for example: A, B and C type customers and VARs and distributors.

## 2.1 The Contact List

**Edit Company** [Update] [Cancel] [Print Card]

**Company Detail**

Company Name:  Account Number:

Sales Staff:  Date Opened:

Category:  Website:

Type:  User Defined 1:

State:  User Defined 2:

Source:  User Defined 3:

Industry:  User Defined 4:

Area:  User Defined 5:

User Defined 6:

**Contacts** [New]

Contact	Name	Tel	Fax	Designation
4	<a href="#">Byron Cooke-Tonnesen Mr</a>	011 462 6871		Chief Executive Officer in charge of all things to test the length of
1	<a href="#">Denzil Govender Mr</a>	011 462 6871		Managing Director
3	<a href="#">Quin Bergh Mr</a>	011 462 6871		Managing Director
6	<a href="#">Samuel Kimathi Mr</a>	011 462 6871		General Manager
2	<a href="#">Sheila Welch Ms</a>	011 462 6871		Sales Manager
5	<a href="#">Stuart Lowe Mr</a>	011 462 6871		Sales & Marketing Director
7	<a href="#">Tania Cooke-Tonnesen Ms</a>	011 462 6871		Human Resources Manager

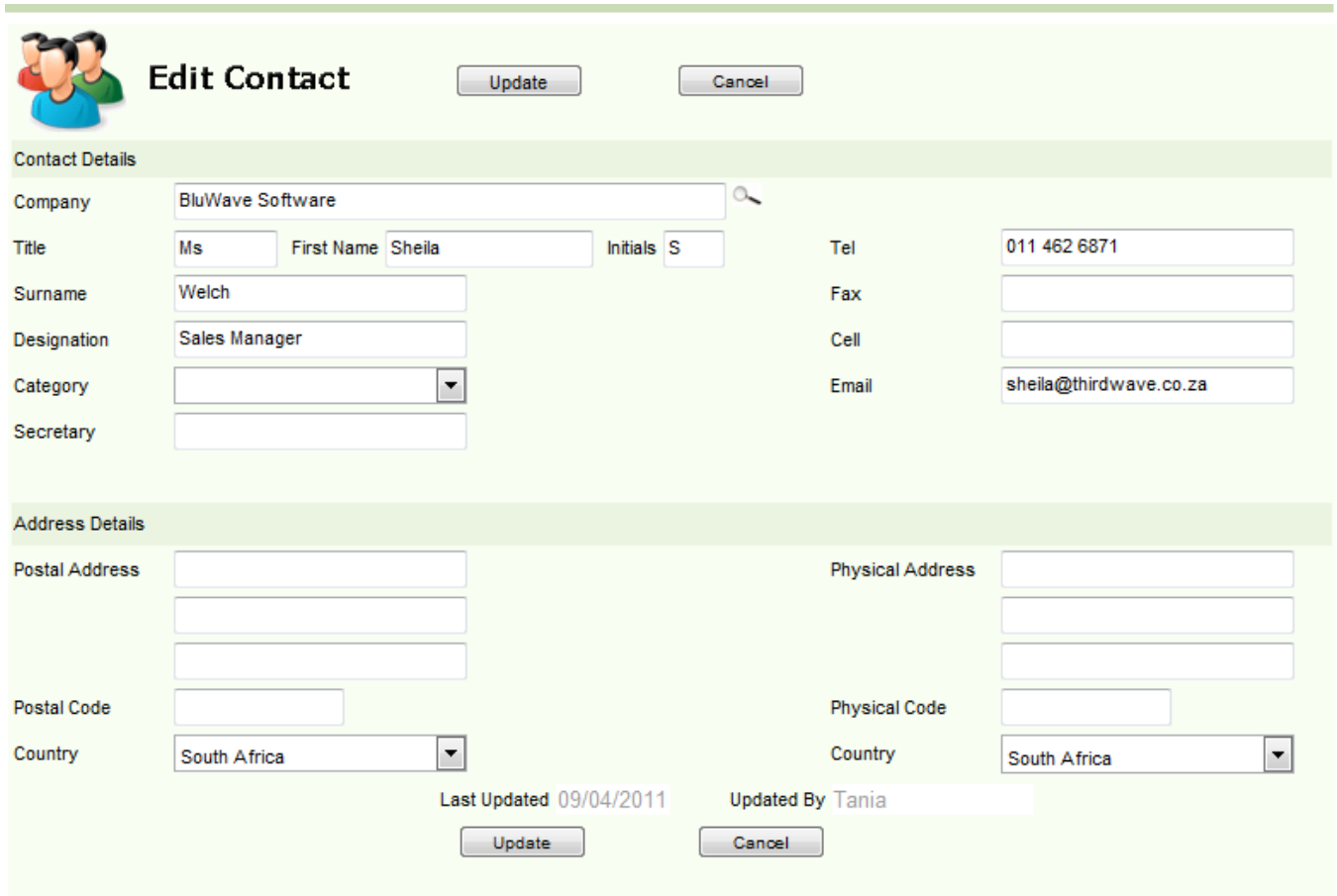
Scheduled Activities [New]

Completed Activities [New]

Opportunities [New]

- Expand the Contact list by clicking on the down arrow in the same line.
- Click on the contact in order to open the contact editing form.
- Click on the new button to add a new contact.

## 2.2 Edit the Contact



The form is titled "Edit Contact" and features a header with a contact icon, the title, and "Update" and "Cancel" buttons. It is divided into two main sections: "Contact Details" and "Address Details".

**Contact Details**

Company	BluWave Software			Tel	011 462 6871
Title	Ms	First Name	Sheila	Initials	S
Surname	Welch			Fax	
Designation	Sales Manager			Cell	
Category	[Dropdown]			Email	sheila@thirdwave.co.za
Secretary	[Text Field]				

**Address Details**

Postal Address	[Text Field]	Physical Address	[Text Field]
	[Text Field]		[Text Field]
	[Text Field]		[Text Field]
Postal Code	[Text Field]	Physical Code	[Text Field]
Country	South Africa [Dropdown]	Country	South Africa [Dropdown]

Metadata: Last Updated 09/04/2011, Updated By Tania

Buttons: Update, Cancel

- Make your changes to the contact and click on the Update button.

### 3. Diary Planner

These views show the appointments for the day in the yellow section and the tasks at the top in the grey section. You can view your diary for a day, week or month.

#### Day View

<span>&lt;</span> Today <span>&gt;</span>		08 April 2011	Day	Work Week	Week	Month	Timeline
		08 April					
		SuperWave - Ross Botha Mr - Quote Follow up					
		Abacus Computing - Marius Dreyer Mr - Call for Order					
		CC Imelmann Labs - Diana Shaw Ms - Present Proposal					
		ABC Shoes - Denzil Govender Mr - Brochure Follow up					
07	00						
08	00						
09	00	BluWave Software - Denzil Govender Mr - BluWave Demo					
10	00						
11	00						
12	00						
13	00						
14	00						
15	00	ABC Shoes - Denzil Govender Mr - 2nd Consultation sent brochure - call Fri to arrange a consult					
16	00						
17	00						
18	00						

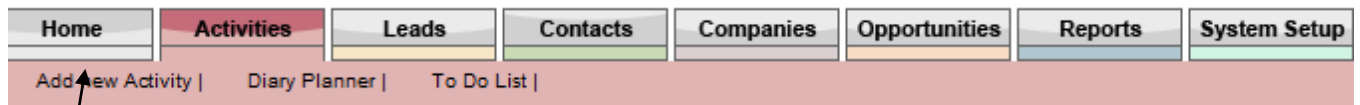
**Week View**

<input type="button" value="Today"/> <input type="button" value="04 - 08 April 2011"/>		Day	Work Week	Week	Month	Timeline
		04 April	05 April	06 April	07 April	08 April
		ABC Shoes - Denzil Govender Mr - Brochure Follow up	BluWave Software - Denzil Govender Mr - Customer Survey BluWave Software - Denzil Govender Mr - Send Quote		SuperWave - Ross Botha Mr - Arrange Cust Visit	SuperWave - Ross Botha Mr - Quote Follow up Abacus Computing - Marius Dreyer Mr - Call for Order CC Imelmann Labs - Diana Shaw Ms - Present Proposal ABC Shoes - Denzil Govender Mr - Brochure Follow up
07	00					
08	00					
09	00		Diamond Products - Dales Son Mr - 2nd Consultation			BluWave Software - Denzil Govender Mr - BluWave Demo
10	00					
11	00			BluWave Software -		
12	00					
13	00					
14	00					
15	00					ABC Shoes - Denzil Govender Mr - 2nd Consultation sent brochure - call
16	00	BluWave Software -				
17	00					
18	00					

**Month View**

Today		April – May 2011				Day	Work Week	Week	Month	Timeline
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday/Sunday					
04 April	5	6	7	8	9					
ABC Shoes - Denzil Govender Mr - Brochure Follow up	BluWave Software - Denzil Govender Mr - Customer Survey	BluWave Software - Denzil Govender Mr - BluWave Demo (Office)	SuperWave - Ross Botha Mr - Arrange Cust Visit	SuperWave - Ross Botha Mr - Quote Follow up						
16:00 16:30 BluWave Software - Denzil Govender Mr - Call Demo (Bryanst	BluWave Software - Denzil Govender Mr - Send Quote	11:00 11:30		Abacus Computing - Marius Dreyer Mr - Call for Order	<a href="#">Show more</a>					
	09:30 12:30 Diamond Products Dales Soi Mr - 2nd Consultat			CC Imelmann Labs - Diana Shaw Ms - Present Proposal	10					
				ABC Shoes - Denzil Govender Mr - Brochure Follow up						
				<a href="#">Show more</a>						
11	12	13	14	15	16					
BluWave Software - Sheila Welch Ms - BluWave Demo	BluWave Software - Samuel Kimathi Mr - BluWave Demo		09:00 11:00	First Technolo - Byron Cooke M 2nd Consultat						
14:30 16:00 Abacus Computr Marius Dreyer M 2nd Consultat	13:30 15:30 BluWave Software - Samuel Kimathi Mr - BluWave Demo				17					
	13:30 15:30									
18	19	20	21	22	23					
BluWave Software - Byron Cooke-Tonnesen Mr - Call for Demo										
					24					
25	26	27	28	29	30					
					01 May					
2	3	4	5	6	7					
					8					

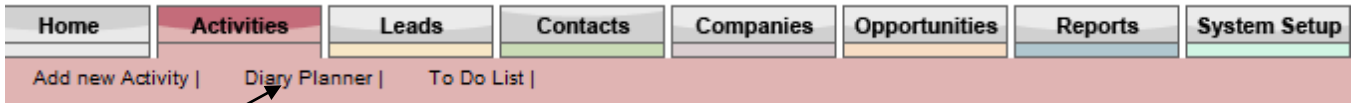
## 4. Managing your Activities



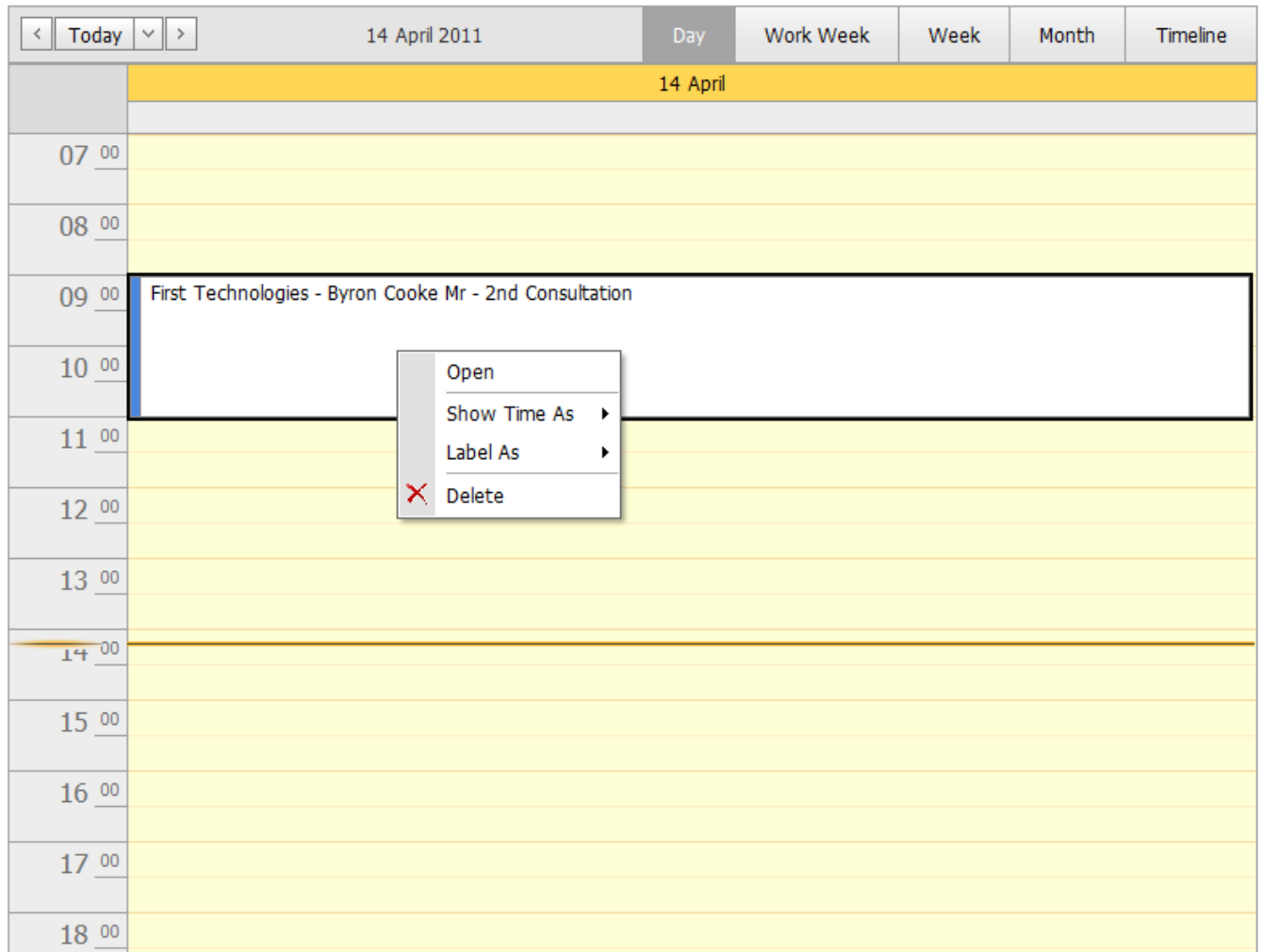
Click on Add New Activity to schedule a task or appointment.

- Select the company and contact person the activity relates to.
- Type the location of the activity.
- Select the type of Activity
- Tick the task box if this is a task and not an appointment. If this is an appointment, select the date and time.
- Type a note for the activity if required.
- Click on the save button. If you wish to create another activity click on the save & close button.

## ***Edit an Activity***




Click on Diary Planner to edit a task or appointment.



Right click on the activity and select Open

Make the necessary changes and click on the Update button.



### Edit Appointments

---

Appointment Details \* = Required Fields

Sales Staff:

Company:  \*

Contact:  \*

Location:

Activity:  \*

Task?


Start Date:

End Date:

Note:



Completed


You can also edit an activity from the company tab. Expand the Scheduled Activities list and click on the activity you wish to edit. It will open the same screen as above.




## Edit Company


**Company Detail**

Company Name	<input type="text" value="BluWave Software"/>	Account Number	<input type="text"/>
Sales Staff	<input type="text" value="Tania"/>	Date Opened	<input type="text" value="04/04/2011"/>
Category	<input type="text" value="Prospect"/>	Website	<input type="text"/> 
Type	<input type="text" value="A Type"/>	User Defined 1	<input type="text" value="0"/>
State	<input type="text" value="Active Customer"/>	User Defined 2	<input type="text" value="0"/>
Source	<input type="text" value="Internet"/>	User Defined 3	<input type="text"/> 
Industry	<input type="text" value="Chemicals"/>	User Defined 4	<input type="text"/>
Area	<input type="text" value="JHB - Western Suburbs"/>	User Defined 5	<input type="text"/>
		User Defined 6	<input type="text"/>

**Contacts**  [New](#)

**Scheduled Activities**  [New](#)

Date	Time	Activity	Contact	Note
04/04/2011	16:00	<a href="#">Call for Demo</a>	Mr Denzil Govender	Call to book time
05/04/2011	20:42	<a href="#">Send Quote</a>	Mr Denzil Govender	
08/04/2011	09:00	<a href="#">BluWave Demo</a>	Mr Denzil Govender	
09/04/2011	10:01	<a href="#">Arrange Cust Visit</a>	Mr Denzil Govender	Booking activity
09/04/2011	11:00	<a href="#">BluWave Demo</a>	Mr Byron Cooke-Tonnesen	
11/04/2011	16:54	<a href="#">BluWave Demo</a>	Ms Sheila Welch	test
12/04/2011	13:30	<a href="#">BluWave Demo</a>	Mr Samuel Kimathi	
12/04/2011	13:30	<a href="#">BluWave Demo</a>	Mr Samuel Kimathi	
18/04/2011	00:00	<a href="#">Call for Demo</a>	Mr Byron Cooke-Tonnesen	

**Completed Activities**  [New](#)

## Completing your Activities

**Edit Appointments**

Appointment Details \* = Required Fields

Sales Staff:

Company:  \*

Contact:  \*

011 462 6871  082 345 6789

Location:

Activity:  \*

Task?

Start Date:

End Date:

Note:

Completed

Edit the Activity in the usual way, tick the completed box and click on the Update button.

## **OPPORTUNITY TRACKING**

**Prospect** - A Client you are trying to sell to.

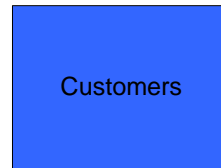
**Customer** – A Client you have already sold to.

**Opportunity** – A deal which has a value and status which could be for a Prospect or a Customer.

### **Types of Statuses**

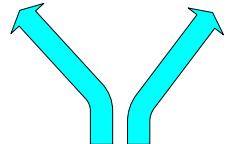
#### **Prospects**

- Active
- Inactive



#### **Customers**

- A – Type
- B – Type
- C – Type
- Dormant
- Lost



#### **Key Note:**

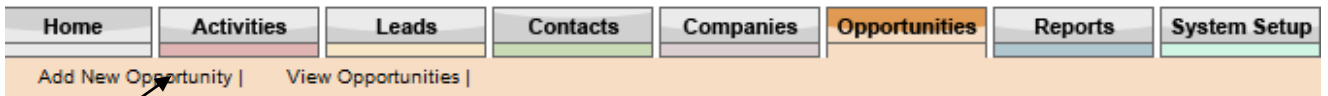
- An Opportunity is an active Sale
- Both prospects and customers can have opportunities
- There can be multiple opportunities per prospect or customer

#### **Opportunities**

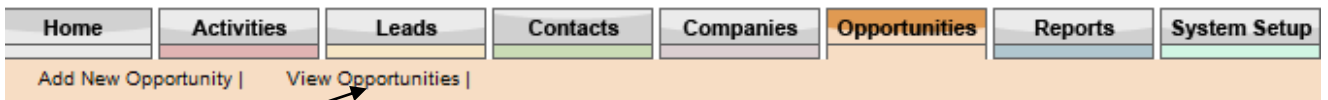
- Lead
- First contact
- Presented
- Quote Submitted
- Awaiting Budget Approval
- Verbal Order
- Ordered/Sold
- Lost
- Lost To Competitor

## 5. Opportunity Tracking

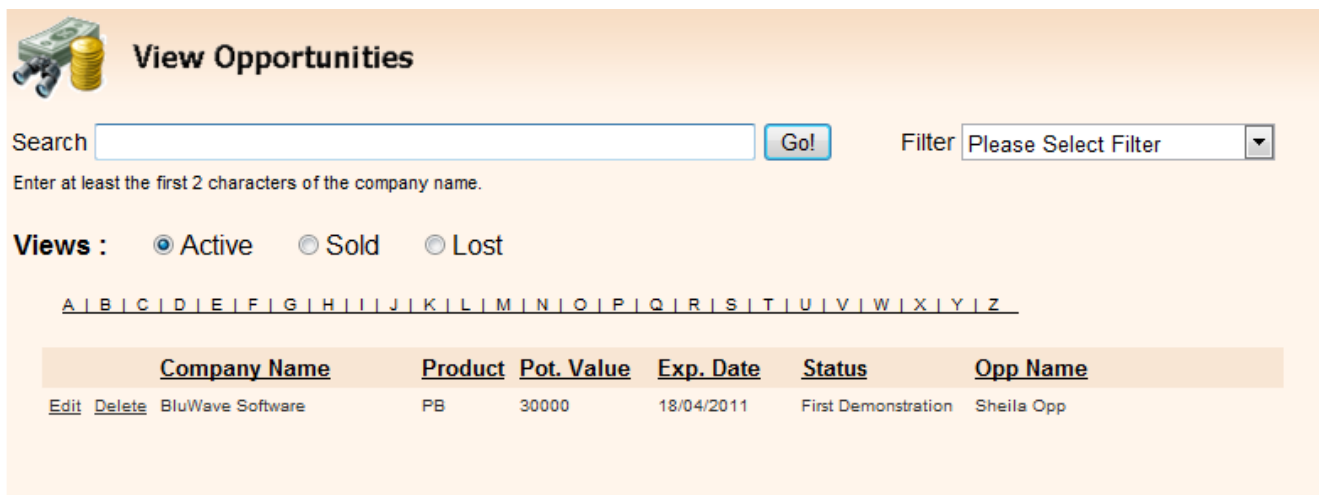
Begin by clicking on the Opportunity Tab. Start typing the company name in the Search box; you need to enter at least 2 characters. You can also select a letter in the alphabet to view a list of companies beginning with that letter. This will enable you to view your opportunities by Company.



Click on Add New Opportunity to create a new Sales Opportunity.



Click on View Opportunities to get a list of Opportunities.

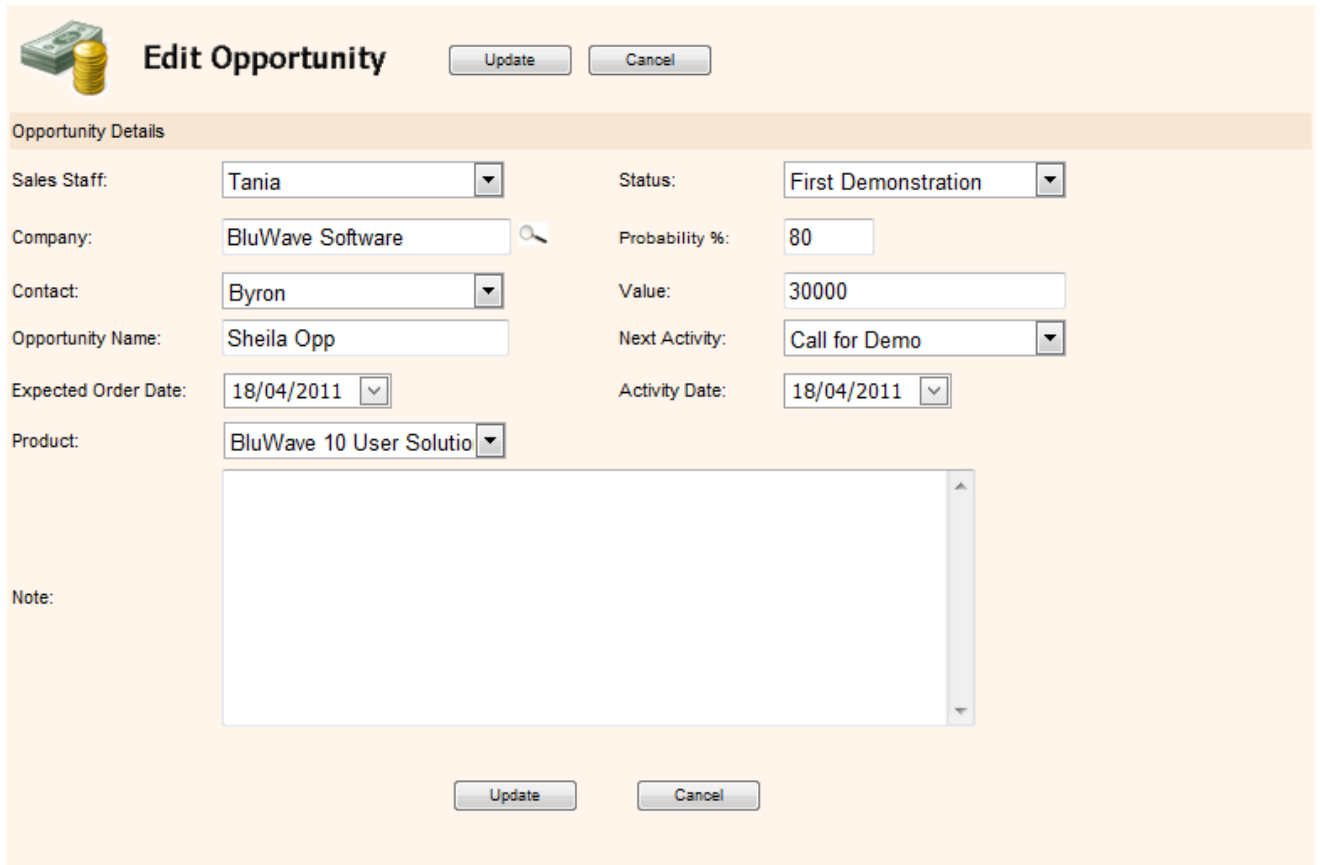


The screenshot shows the 'View Opportunities' page. It features a search box with a 'Go!' button and a filter dropdown menu. Below the search box, there are radio buttons for 'Active', 'Sold', and 'Lost'. A horizontal line of letters (A-Z) is visible. Below this, there is a table with columns: Company Name, Product, Pot. Value, Exp. Date, Status, and Opp Name. The first row of data shows 'BluWave Software', 'PB', '30000', '18/04/2011', 'First Demonstration', and 'Sheila Opp'. There are 'Edit' and 'Delete' links next to the company name.

Company Name	Product	Pot. Value	Exp. Date	Status	Opp Name
<a href="#">Edit</a> <a href="#">Delete</a> BluWave Software	PB	30000	18/04/2011	First Demonstration	Sheila Opp

Select Edit on the relevant opportunity to view those details.

## **Edit Opportunity**



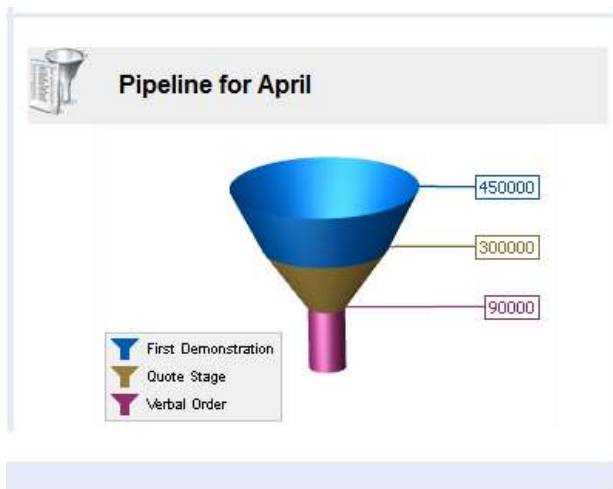
The screenshot shows the 'Edit Opportunity' form in a CRM system. At the top left, there is an icon of a stack of money and a gold coin. The title 'Edit Opportunity' is centered at the top, with 'Update' and 'Cancel' buttons to its right. Below the title is a section header 'Opportunity Details'. The form contains several fields: 'Sales Staff' (dropdown: Tania), 'Company' (text: BluWave Software with a search icon), 'Contact' (dropdown: Byron), 'Opportunity Name' (text: Sheila Opp), 'Expected Order Date' (dropdown: 18/04/2011), 'Product' (dropdown: BluWave 10 User Solutio), 'Status' (dropdown: First Demonstration), 'Probability %' (text: 80), 'Value' (text: 30000), 'Next Activity' (dropdown: Call for Demo), and 'Activity Date' (dropdown: 18/04/2011). A large text area labeled 'Note:' is positioned below the product dropdown. At the bottom of the form, there are 'Update' and 'Cancel' buttons.

- In this screen you can select the expected order date, enter the potential sale value and probability of this opportunity.
- The status field is used to monitor your progress. This is very useful for status reports.
- Advantage will also enable you to attach files related to the opportunity.
- Click on the Update button to save the changes.

## ***Opportunity Tracking (Managing the Sales Pipeline)***

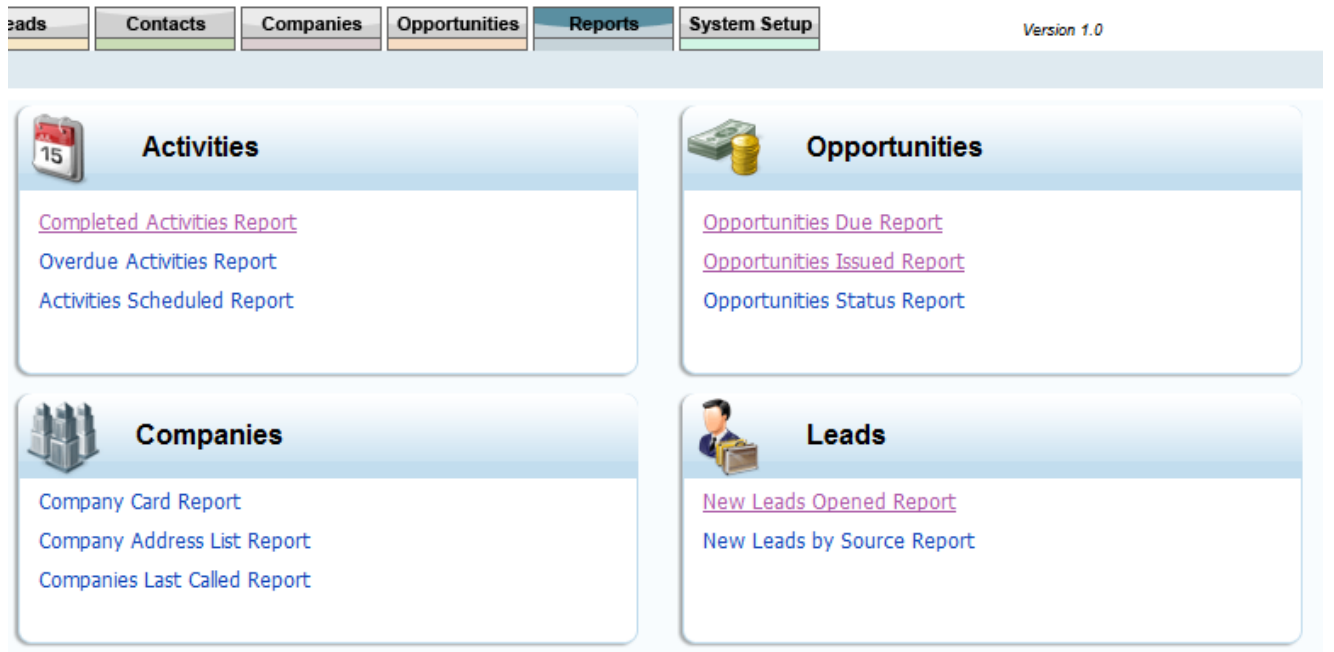
Use the Opportunity Tracking functions to manage new business acquisition.

- Define your own sales process for tracking the progress of your sales pipeline.
- The system generates a new business forecast based on expected order dates and sales probability percentages.
- Each sales person can view his pipeline visually on his homepage. Additional graphing on the sales person's dashboard details progress against target.



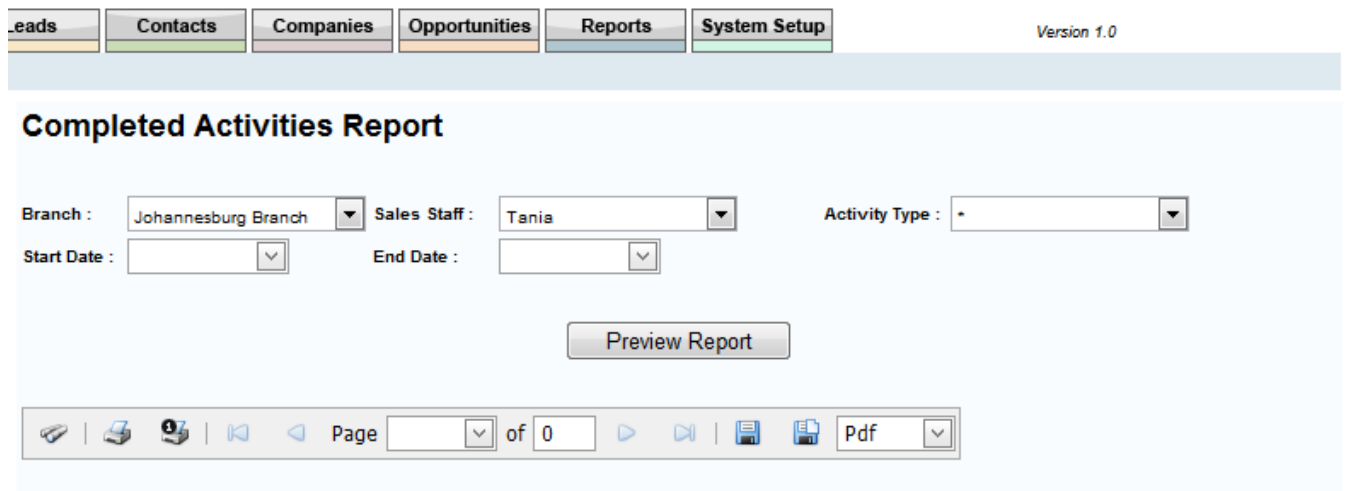
## 6. Reports

There are various reports to choose from.  
Click on the report you wish view.



The screenshot shows the BluWave CRM interface with the 'Reports' menu selected. The navigation bar includes 'Leads', 'Contacts', 'Companies', 'Opportunities', 'Reports', and 'System Setup'. The 'Reports' section is divided into four categories: Activities, Opportunities, Companies, and Leads. Each category lists several report options.

- Activities**
  - [Completed Activities Report](#)
  - [Overdue Activities Report](#)
  - [Activities Scheduled Report](#)
- Opportunities**
  - [Opportunities Due Report](#)
  - [Opportunities Issued Report](#)
  - [Opportunities Status Report](#)
- Companies**
  - [Company Card Report](#)
  - [Company Address List Report](#)
  - [Companies Last Called Report](#)
- Leads**
  - [New Leads Opened Report](#)
  - [New Leads by Source Report](#)



The screenshot shows the 'Completed Activities Report' form. It includes a navigation bar with 'Leads', 'Contacts', 'Companies', 'Opportunities', 'Reports', and 'System Setup'. The form has the following fields:

- Branch: Johannesburg Branch
- Sales Staff: Tania
- Activity Type: \*
- Start Date: [Dropdown]
- End Date: [Dropdown]

A 'Preview Report' button is located below the form. At the bottom, there is a toolbar with icons for print, refresh, and other functions, along with a page indicator showing 'Page 0 of 0' and a 'Pdf' button.

Select the relevant Branch, Sales Staff, Activity if required and date range. Click on Preview Report button.

# Completed Activities Report

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**Branch :** Johannesburg Branch

---

**Salesperson :** Tania

**Activity Description :** Arrange Cust Visit

07/04/2011 SuperWave Mr Ross Botha  
called and scheduled for next week

---

**Total For Activity Type :** Arrange Cust Visit **1**

**Activity Description :** BluWave Demo

06/04/2011 BluWave Software Mr Denzil Govender  
Presented BluWave solution for sales and senior management as well as national sales team. Interest in I Pad - took that to demo as well. Market capital items - tenders - need to follow-up on tender awards.

---

**Total For Activity Type :** BluWave Demo **1**

**Activity Description :** Customer Survey

05/04/2011 BluWave Software Mr Denzil Govender  
Called re project progress - opp tracking going well - foll up on quotes side. Installed but no training done yet on it.

---

**Total For Activity Type :** Customer Survey **1**

**Activity Description :** Present Proposal

01/04/2011 Diamond Products Mr Dales Son  
Meet with Dale and Fin Dir go thru proposal reviewed - to start in May after Easter

---

**Total For Activity Type :** Present Proposal **1**

---

**Total For Salesperson :** Tania **4**

---

**Total For Branch :** Johannesburg Branch **4**

---