

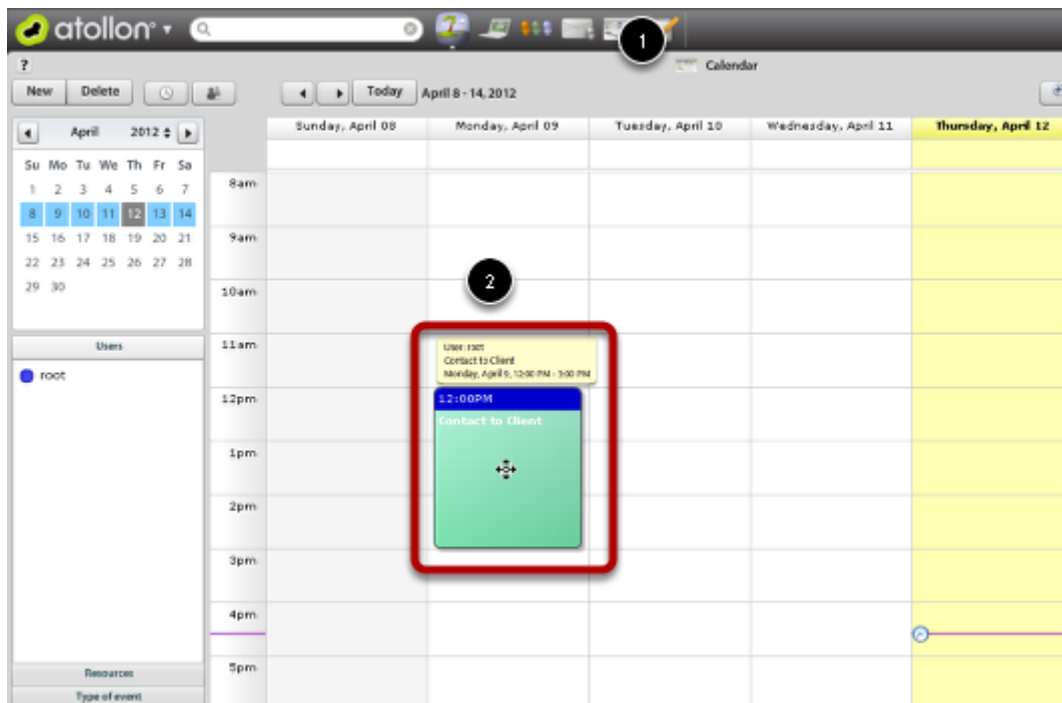
Typical Sales use Cases

- [Arrange a Meeting and Record Meeting Notes](#)
- [Create new Deal and send Estimate](#)

Arrange a Meeting and Record Meeting Notes

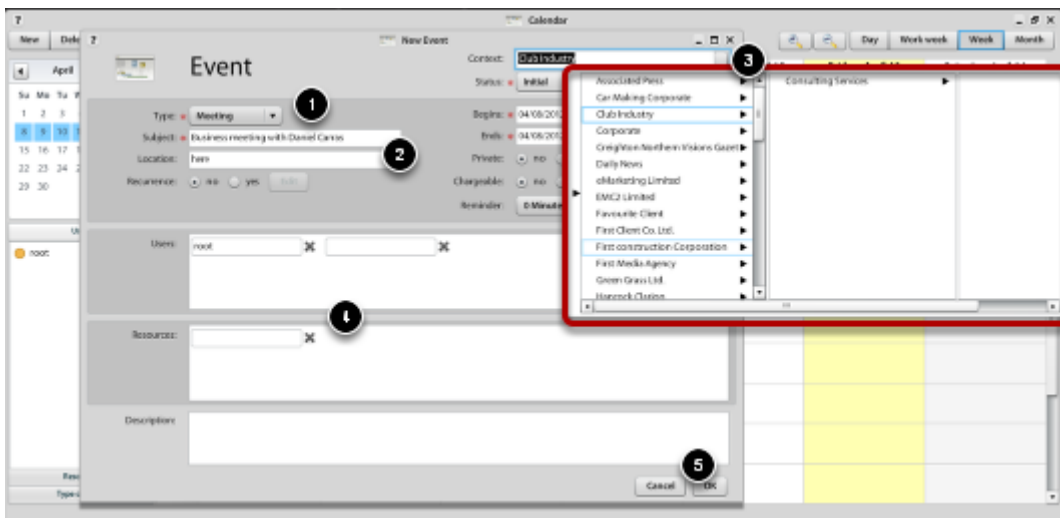
See below guide to arrange a meeting (calendar event, presentation, etc.) and write meeting notes from event.

New event



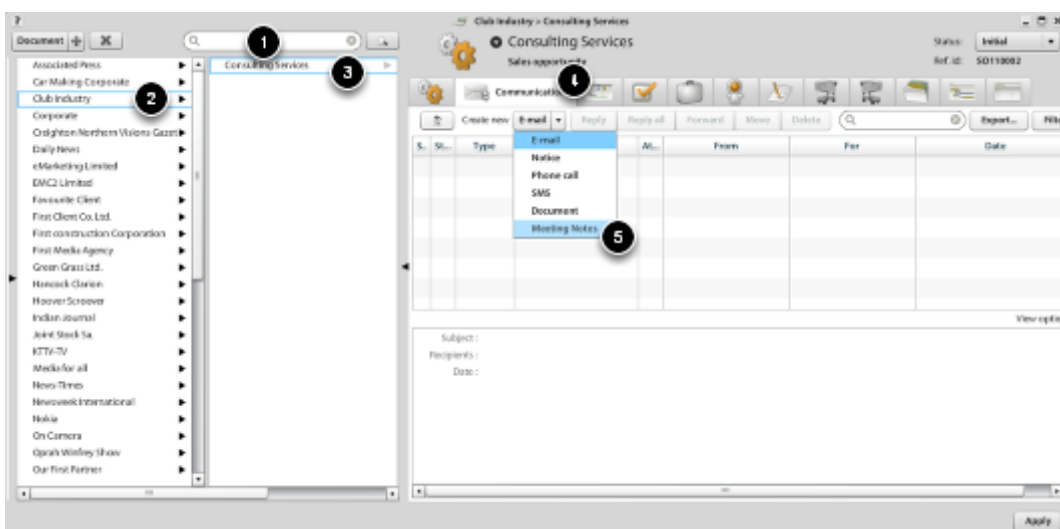
- 1) Open and navigate to the **calendar** day on which you want create a new event
- 2) At a time where you want place event click by mouse, or just pull the mouse from the beginning to the end of event to set the length of the event

New event on Sales opportunity



- 1) Set the type of event, it is a meeting (it will be useful in assessing how many meetings you managed)
- 2) Add the summary and event location
- 3) Select the **context** to **client's sales opportunity** which you should the event refers
- 4) Add participants or resources
- 5) Save your event

Enter meeting notes



It is recommended to create record from meeting in the form of Meeting Notes. That will be visible in the overall history of the sales opportunity.

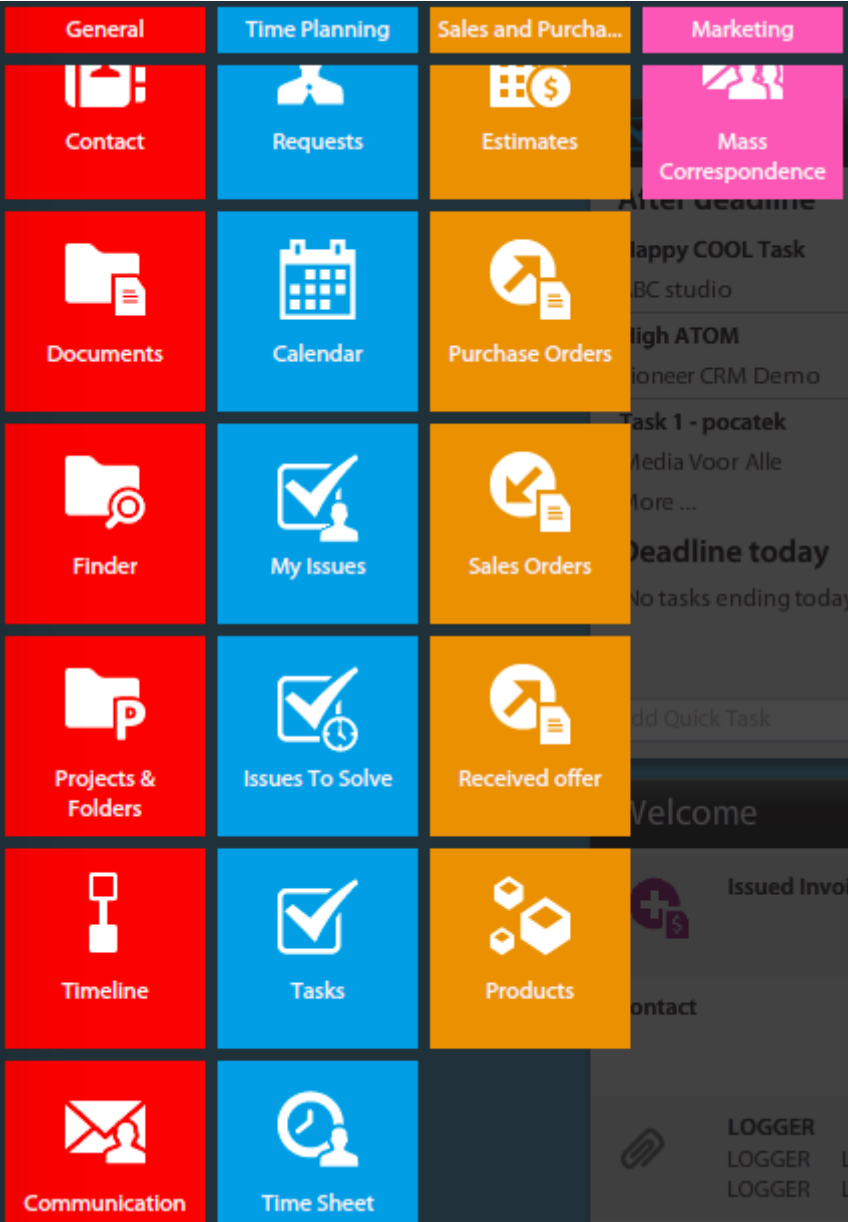
- 1) Enter the client name, press Enter
- 2) Select founded client in Finder
- 3) Select the appropriate project / sales opportunity
- 4) Choose the tab Communication
- 5) Create new message "Meeting Notes"

After opening message, make meeting subject and content, you can also notice your colleagues and save the entry.

Create new Deal and send Estimate

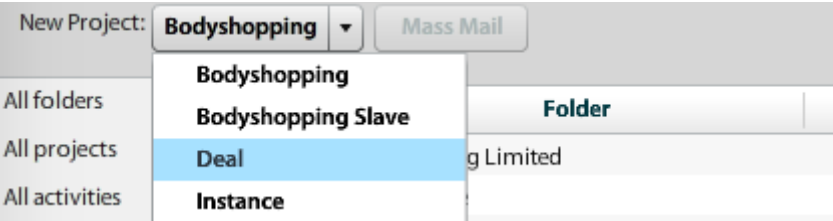
This wizard will show you how one of the ways to create and use Deals (or **Sales Opportunity**) in Atollon.

Open Projects & Folders




Deals are one of the types of projects that can be created. Move cursor to Atollon icon (top-left) and then click on **Projects & Folders**

Create new deal



On this place you can choose project template, for now it is Deal.

Fill-in the deal form


Deal

☒ Business
☐ Individual

Company Name:

Reg. No.:

VAT No.:

Web:

Primary Industry:

Comment:

Company Folder *

Dodací

Fakturace

Street:

Zip:

City:

Region:

Country:

☒ New Contact

Prefix + First Name

Surname + Suffix

Telefon: is primary: ☐

Mobil: is primary: ☐

Fakturační e-mail: is primary: ☐

Salutation:

Comment:

Folder name: *

Reference Id:

Description:

Project name: *

Reference Id:

Cancel

Create

When creating new Deal, you can choose existing contact or create new one.

If you create new one follow steps to fill-in contact data for company and person (relationship employer and employee).

You can enter Client data during creation of new Deal, but it is also possible to select existing Client.

Last step of wizard is filling details about this Sales opportunity

Set deal value and margin

Before you can set deal value, you have to add some product or service.

Icon	Deal #	Client	Deal name	Status	Owner	Last marketing tr...	Last contacted	Deal value
🔴	todso	Today Software a.s.	Opportunity for deliver	Won	deletedUser			EUR 0
🔴	schso	Schloss GMBh.	Product Z Sales	Lost	deletedUser			EUR 0
🔴	passso	Pascal	Product Y Sales	Enquiry	deletedUser			EUR 0
🔴	malso	Malév Zrt.	Product X Sales	Proposal	deletedUser			EUR 0
🔴	hooso	Hoover Scroover	Upselling	Presentation	deletedUser			EUR 0
🔴	gresso	Grun Gras GMBh.	Consulting sales	Qualification	deletedUser			EUR 0
🔴	erso	Erste Medienagentur	New top opportunity	Proposal	deletedUser			EUR 0
🔴	elbso	Elba IT Solutions	New business	Won	deletedUser			EUR 0
🔴	appso	Apple	New services	Won	deletedUser			EUR 0
🔴		Smart Company Ltd.	A560 Sales	Enquiry	Atollon Admin			GBP 45,000
🔴		Master Genius	Deal	Enquiry	Simon Sorcerer			EUR 45,000
🔴		Technology Unlimited	Upgrade	Enquiry	Simon Sorcerer			EUR 2,000
🔴		Technology Unlimited	Deal	Enquiry	Simon Sorcerer			EUR 3,400
🔴		Smart Company Ltd.	Deal	Enquiry	Simon Sorcerer			EUR 45,000

Customize product details in deal

After adding items to the Deal there is a possibility to assess chance of closing the business case. Usually the chance is increasing during the progress of a deal.

Create Estimate

The screenshot shows a 'Business Case' window in the background and an 'Estimate' window in the foreground. The 'Business Case' window has fields for 'Expected close date' (03/14/2020), 'Probability', 'Provider' (Pioneer CRM Demo), and 'Invoice to'. The 'Estimate' window has a title bar with 'Estimate' and a close button. It contains fields for 'Context' (First American, Great Deal), 'Status' (Vystav), 'Number', 'External number', 'Journal' (Cenová kalkulace), 'Currency' (CZK), 'Issued date' (03/), and 'Valid until' (03/). Below these fields is a table with columns: Name, Unit Price, Qty., VAT, Amount, and incl. Tax. The table has one row: '1. Action Camera' with a unit price of 5,600.00 CZK, quantity of 1, VAT of DPH 21%, amount of 5,600.00 CZK, and incl. tax of 6,776.00 CZK. At the bottom of the 'Estimate' window, there are buttons for '+ Product(s)', '+ Local file(s)', 'Controlling', 'Mass change', 'Discount: 0.00%', 'Total: CZK 5,600.00', 'Incl. VAT: CZK 6,776.00', 'Send for approval...', 'Approve', 'Cancel', 'Apply', and 'OK'. At the bottom of the 'Business Case' window, there are buttons for 'New', 'Delete', and a summary bar showing 'Σ Purchase = 4,500.00' and 'Σ Sales = 5,600.00'. At the bottom of the entire screen, there are buttons for 'Create Invoice', 'Create Estimate', 'Create Sales Order', and 'Create Purchase Order'.

Business Case

Expected close date: 03/14/2020 Probability:

Provider: Pioneer CRM Demo Invoice to:

New Delete

1 Action Camera

Estimate

Context: * First American Great Deal

Status: * Vystav

Number:

External number:

Journal: Cenová kalkulace

Currency: CZK 1

Issued date: 03/

Valid until: 03/

Supplier: Pioneer CRM Demo, City, Country

Customer: First American

Comment:

Custom attributes:

Name	Unit Price	Qty.	VAT	Amount	incl. Tax
1. Action Camera	5,600.00 CZK	1	DPH 21%	5,600.00 CZK	6,776.00 CZK

+ Product(s) X % Controlling Mass change

Discount: 0.00% Total: CZK 5,600.00 Incl. VAT: CZK 6,776.00

Attachments: + Local file(s)

Send for approval... Approve Cancel Apply OK

Σ Purchase = 4,500.00 Σ Sales = 5,600.00

Create Invoice Create Estimate Create Sales Order Create Purchase Order

1. Open the Deal details
2. Click on button "**Create Estimate**" at the bottom of Deal Sales Items

Send estimate to client

There is an easy way to create PDF file and send it to your customer. Just pick the **MAIL** button at the left bottom of **Estimate** detail.

Afterwards system show print templates select menu. You can choose which template you want to print and way of communicating (by e-mail f.e.).

You can send e-mail using (personalized) mail template. E-mail is automatically saved on Sales opportunity context, so you can have it whenever you need it.