

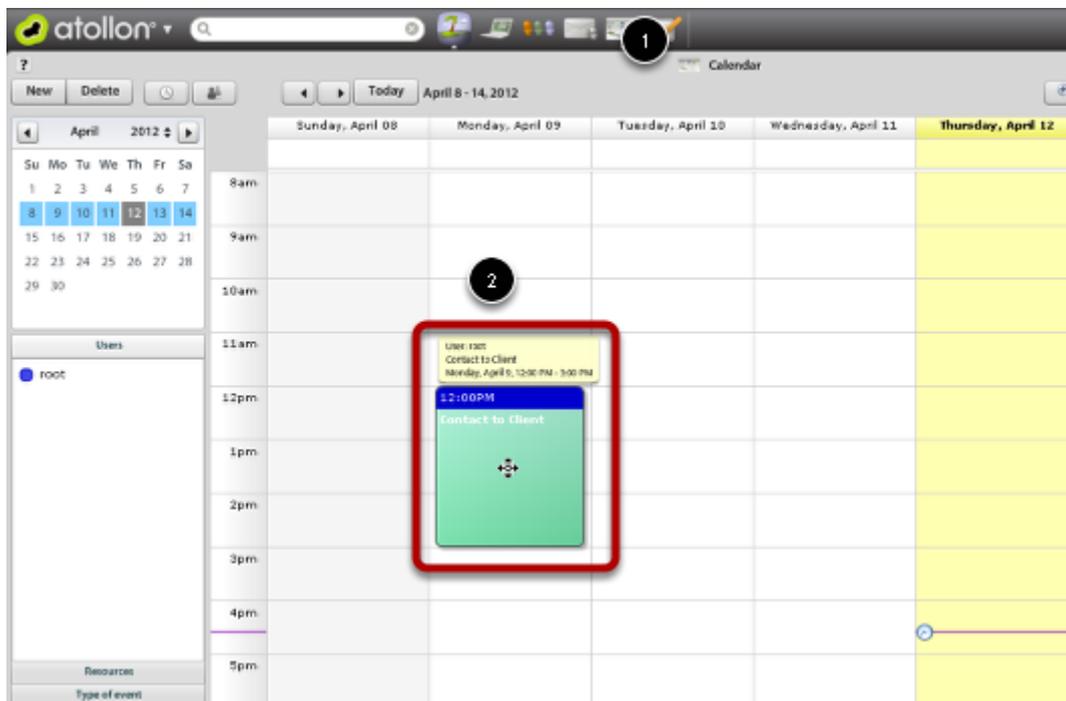
Typical Sales use Cases

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

Arrange a Meeting and Record Meeting Notes

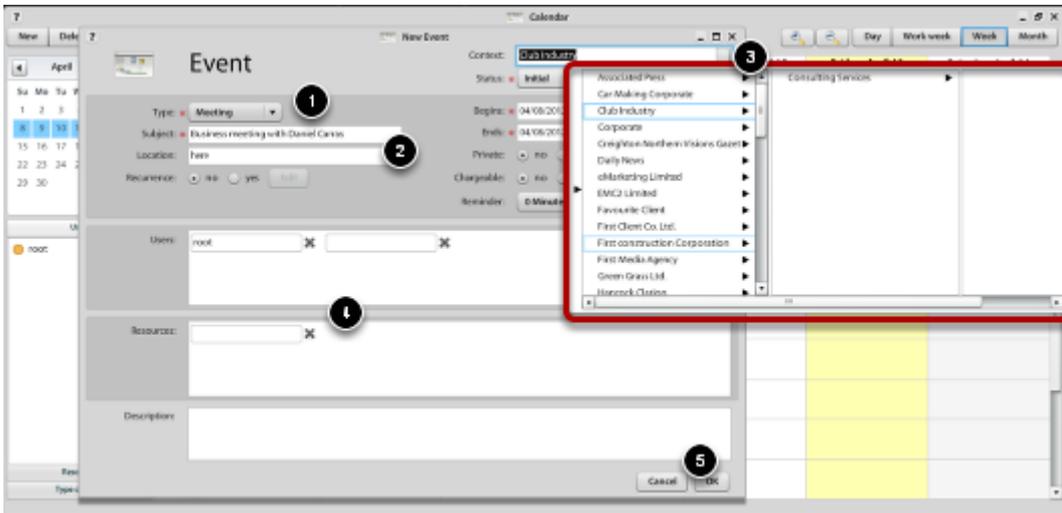
See below guide to arrange a meeting (calendar event, presentation, etc.) and write meeting notes from event.

New event



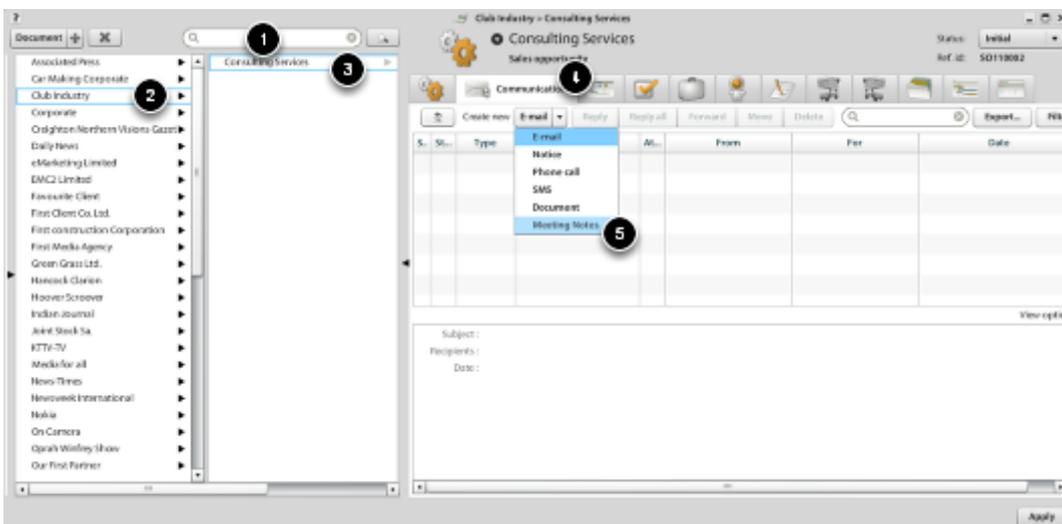
- 1) Open and navigate to the **calendar** day on which you want create a new event
- 2) At a time where you want place event click by mouse, or just pull the mouse from the beginning to the end of event to set the length of the event

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.

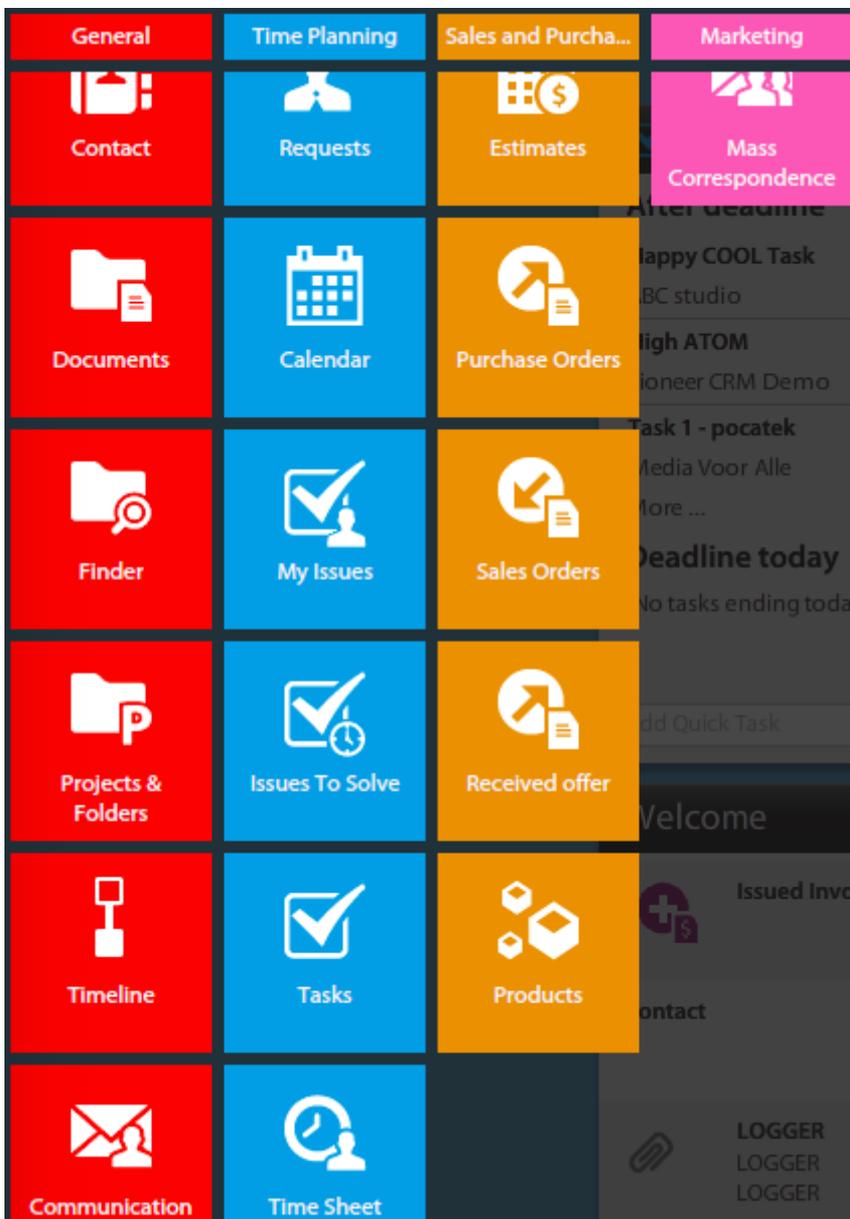
- 1) Enter the client name, press Enter
- 2) Select founded client in Finder
- 3) Select the appropriate project / sales opportunity
- 4) Choose the tab Communication
- 5) Create new message "Meeting Notes"

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

Create new Deal and send Estimate

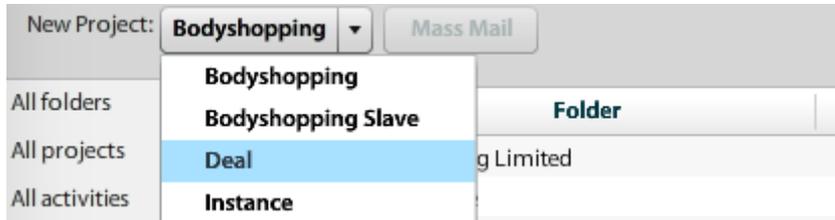
This wizard will show you how one of the ways to create and use Deals (or **Sales Opportunity**) in Atollon.

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

Creating: Deal (Contact information)

 Deal Business Individual

Company Name: Company Folder * ▼

Reg. No.:

VAT No.:

Web

Primary Industry:

Comment:

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:

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 delive	Won	deletedUser			EUR 0
🔴	schso	Schloss GMBh.	Product Z Sales	Lost	deletedUser			EUR 0
🔴	passo	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
🔴	greso	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

Great Deal Contact ▾

Business Case

Expected close date: 03/14/2020 Probability: 0 % Deal Value:

Provider: Pioneer CRM Demo Invoice to:

New Delete Save Premiums

Name	Quantity	Sold quanti...	Remaining ...	Purchased ...	Remaining ...	Unit sales price	Total sales price	Billing date	Ratio						
Action Camera															
<div style="display: flex; justify-content: space-between;"> Item: <input checked="" type="checkbox"/> Action Camera Context: * First American > Great Deal </div> <p>Name: Action Camera</p> <p>Billing Date: 03/14/2020</p> <table border="0" style="width: 100%;"> <tr> <td>Purchase: 4,500 EUR</td> <td>Margin (%): 24.44</td> </tr> <tr> <td>Catalog Price: 5,600 EUR</td> <td>Discount (%): 0.00</td> </tr> <tr> <td></td> <td>Discount 2 (%):</td> </tr> </table> <p>Currency: * EUR Total Quantity: 1</p> <p>VAT: * DPH 0% Fixed Price: <input type="text"/></p> <p>Unit Price: 5,600</p> <p>Description: <input type="text"/></p>										Purchase: 4,500 EUR	Margin (%): 24.44	Catalog Price: 5,600 EUR	Discount (%): 0.00		Discount 2 (%):
Purchase: 4,500 EUR	Margin (%): 24.44														
Catalog Price: 5,600 EUR	Discount (%): 0.00														
	Discount 2 (%):														

Σ Purchase = 0.00

Date

After click on "Deal" tab you can add new items or services into list of demanded / offered services (from items database).

1. Click on Sales opportunity
2. Click on button "NEW"
3. Choose item from database of products and services
4. Add price and quantity
5. Save Sales Opportunity

Probability and Expected closure

Business Case

Expected close date: 03/14/2020 Probability: 80 % Deal Value:

Provider: Pioneer CRM Demo Invoice to:

New Delete Save Premiums

Name	Quantity	Sold quanti...	Remaining ...	Purchased ...	Remaining ...	Unit sales price	Total sales price	Billing date	Ratio
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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

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
Attachments: + Local file(s)

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

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.