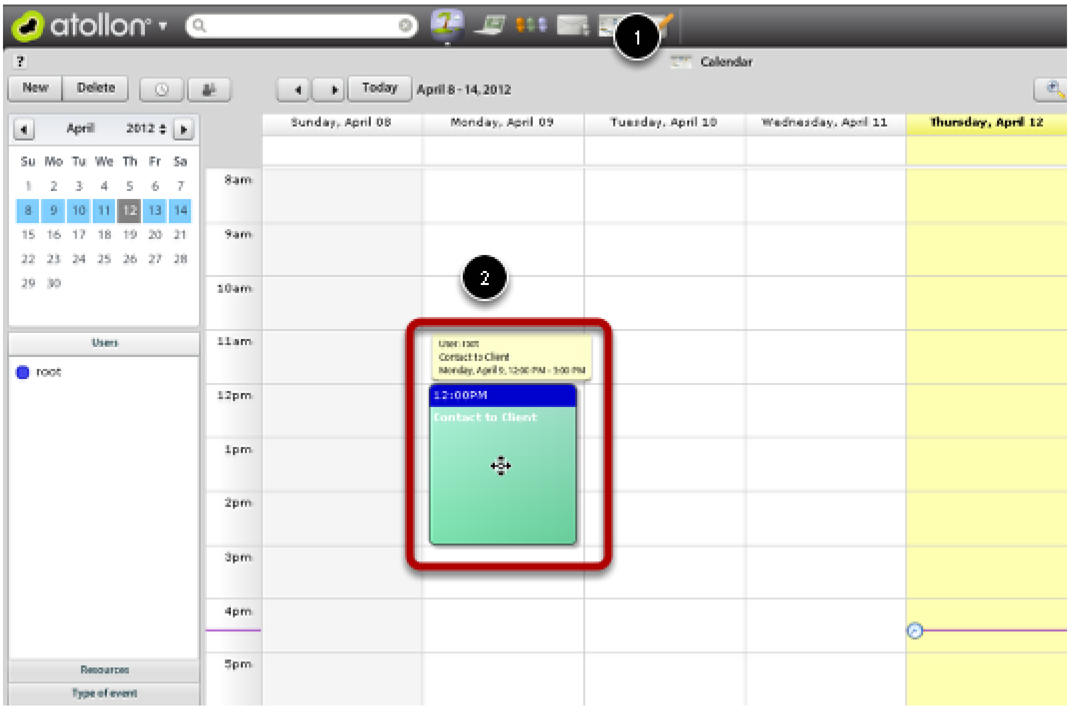
Typical Sales use Cases

- Arrange a Meeting and Record Meeting Notes
- Create new Deal and send Estimate

Arrange a Meeting and Record Meeting Notes

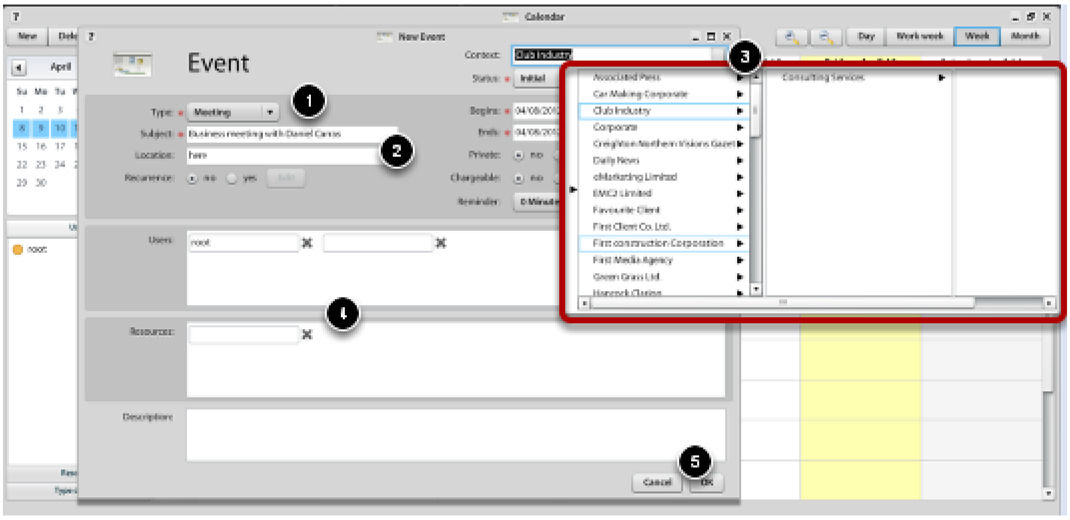
See below guide to arrange a meeting (calendar event, presentation, etc.) and write meeting notes from event.

New event



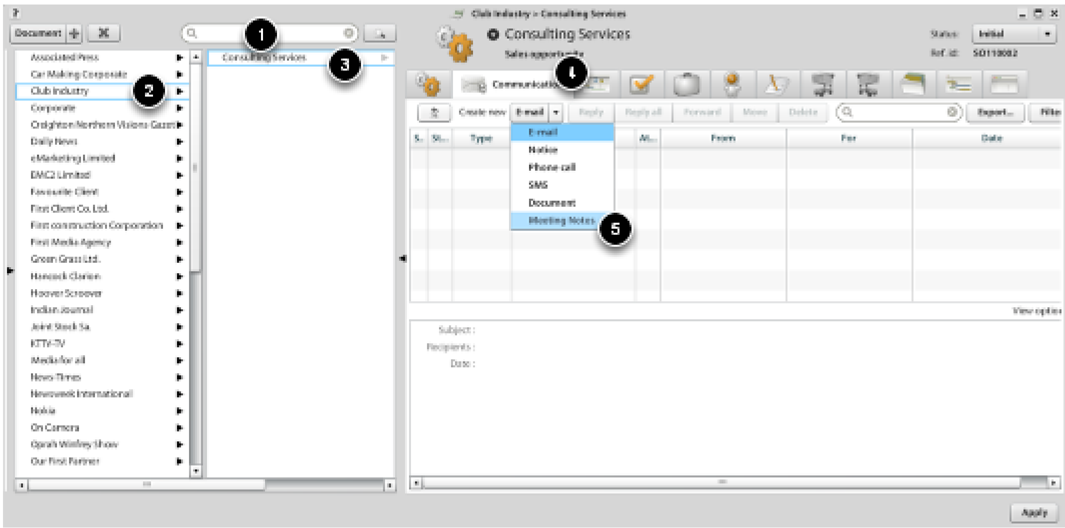
1) Open and navigate to the **calendar** day on which you want create a new event
2) At a time where you want place event click by mouse, or just pull the mouse from the beginning to the end of event to set the length of the event

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.

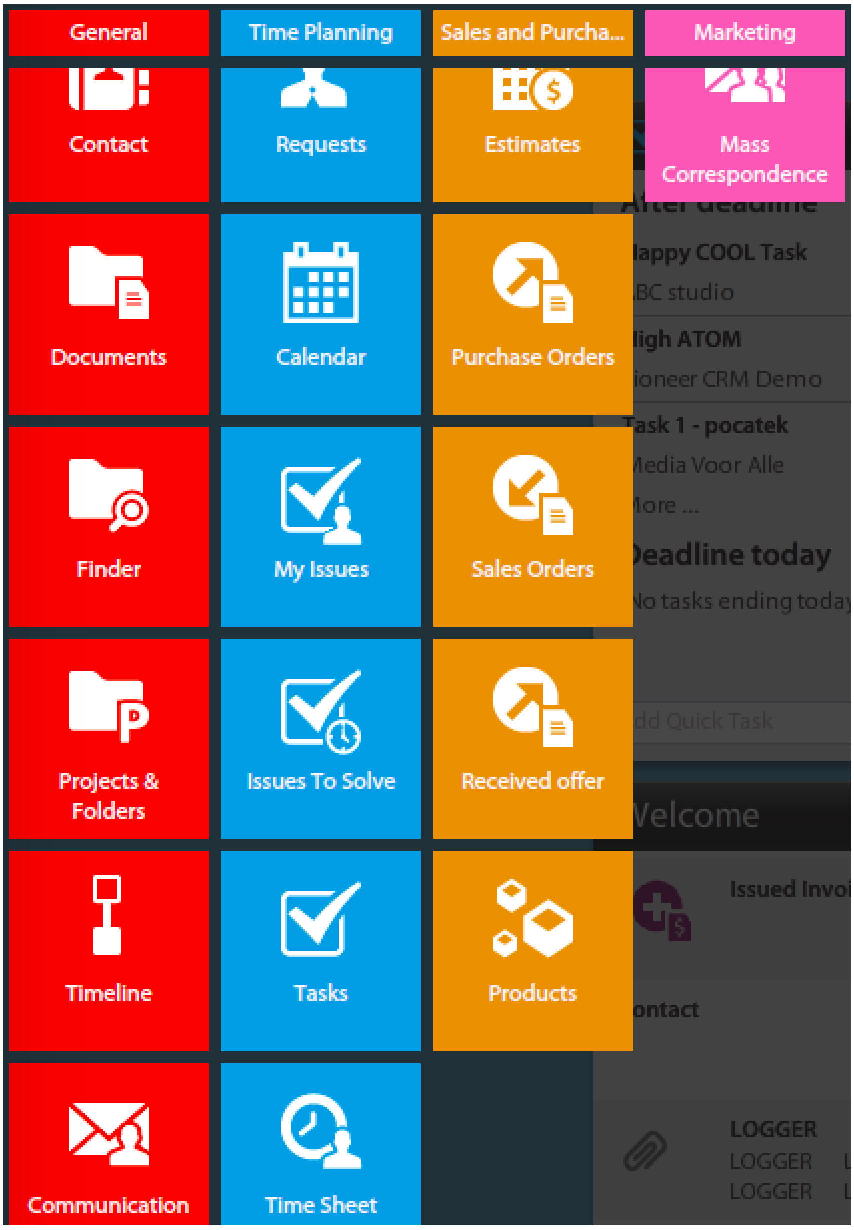
1) Enter the client name, press Enter
2) Select founded client in Finder
3) Select the appropriate project / sales opportunity
4) Choose the tab Communication
5) Create new message "Meeting Notes"

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

Create new Deal and send Estimate

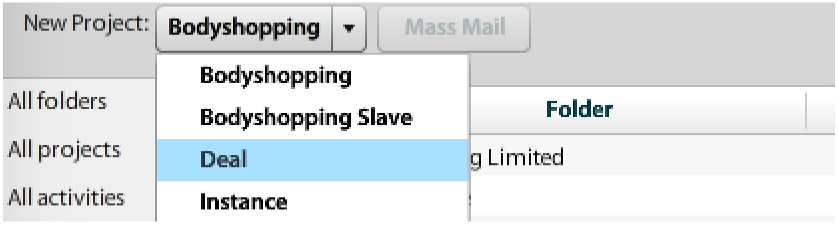
This wizard will show you how one of the ways to create and use Deals (or **Sales Opportunity)** in Atollon.

Open Projects & Folders



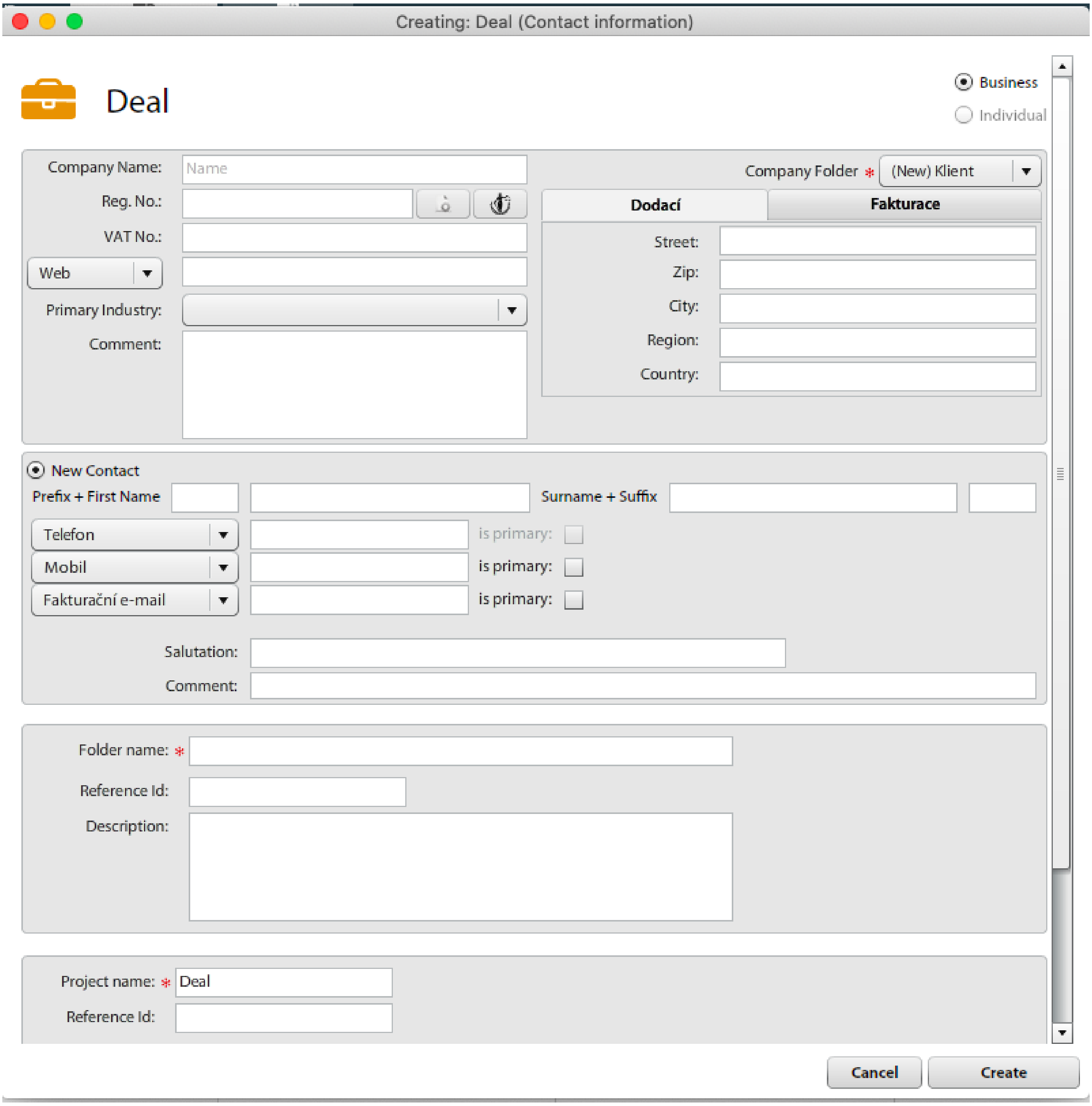
Deals are one of the types of projects that can be created. Move cursor to Atollon icon (top-left) and then click on **Projects & Folders**

Create new deal



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

Fill-in the deal form



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

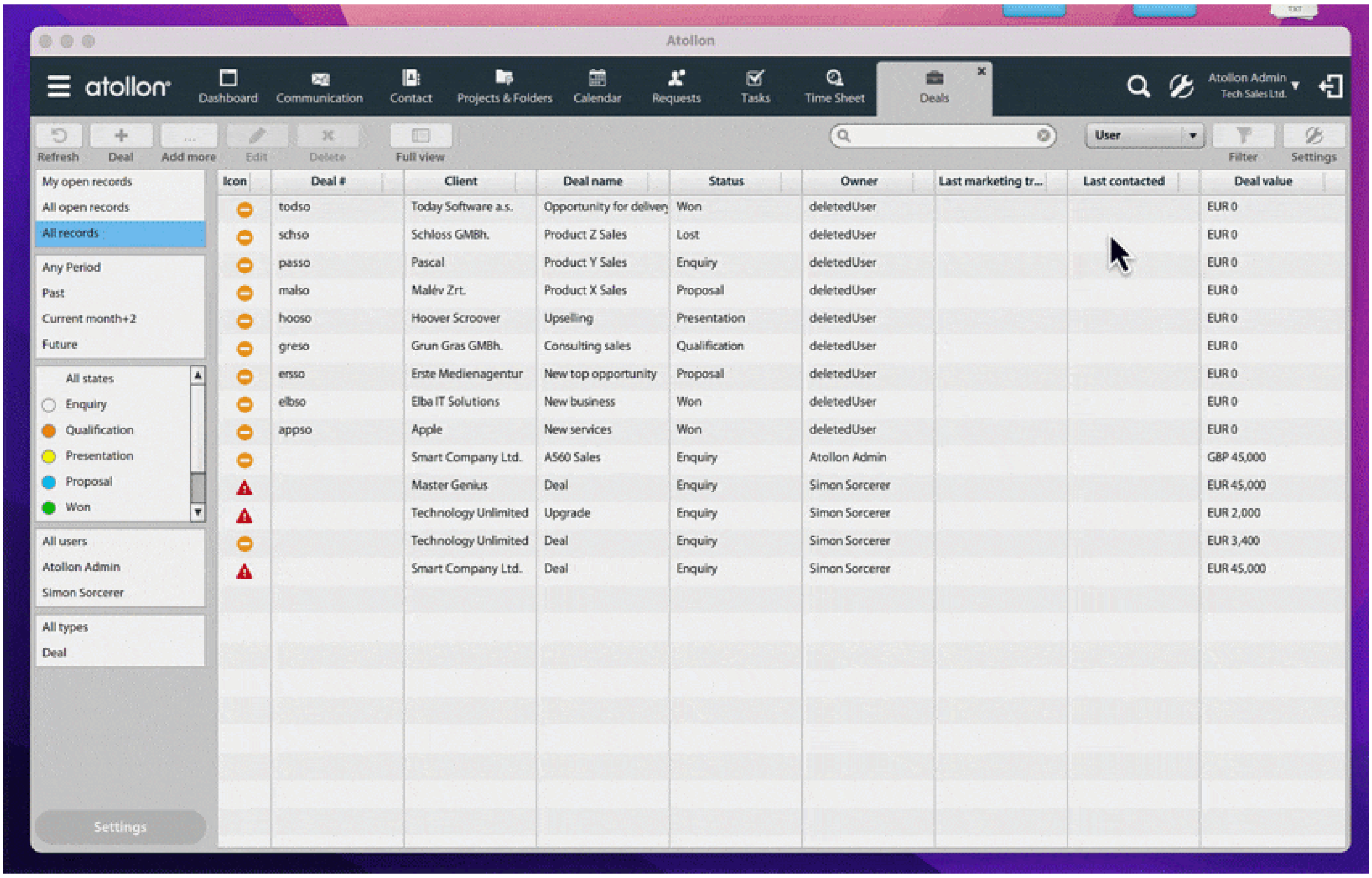
If you create new one follow steps to fill-in contact data for company and person (relationship employer and employee).

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

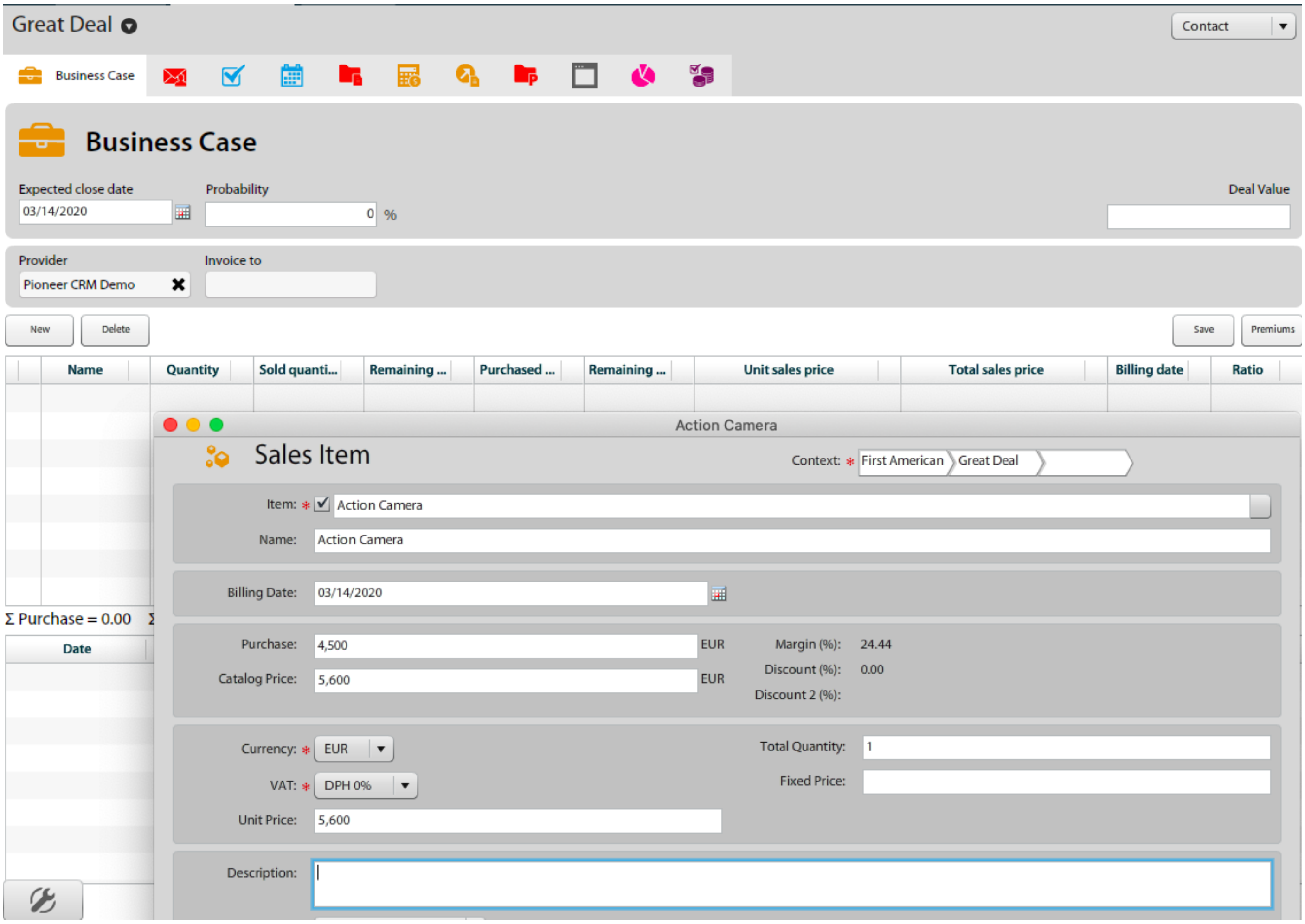
Last step of wizard is filling details about this Sales opportunity

Set deal value and margin

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



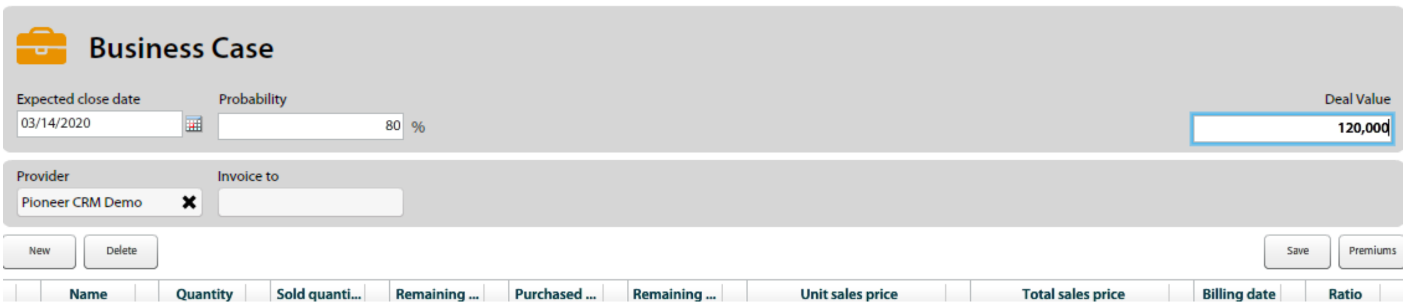
Customize product details in deal



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

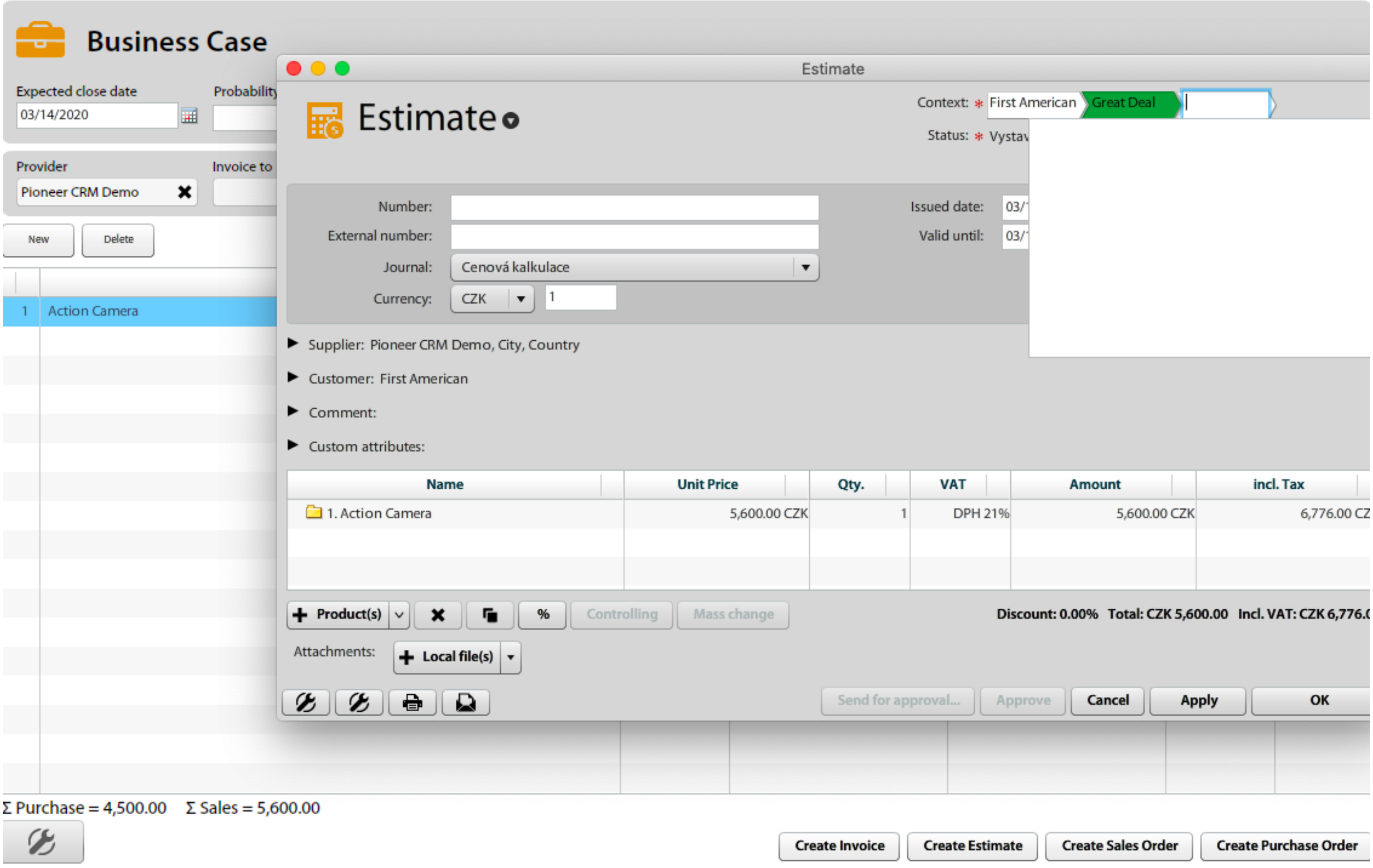
1. Click on Sales opportunity
2.Click on button "NEW"
3. Choose item from database of products and services
4. Add price and quantity
5. Save Sales Opportunity

Probability and Expected closure



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



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.