

Atollon Sales & Marketing

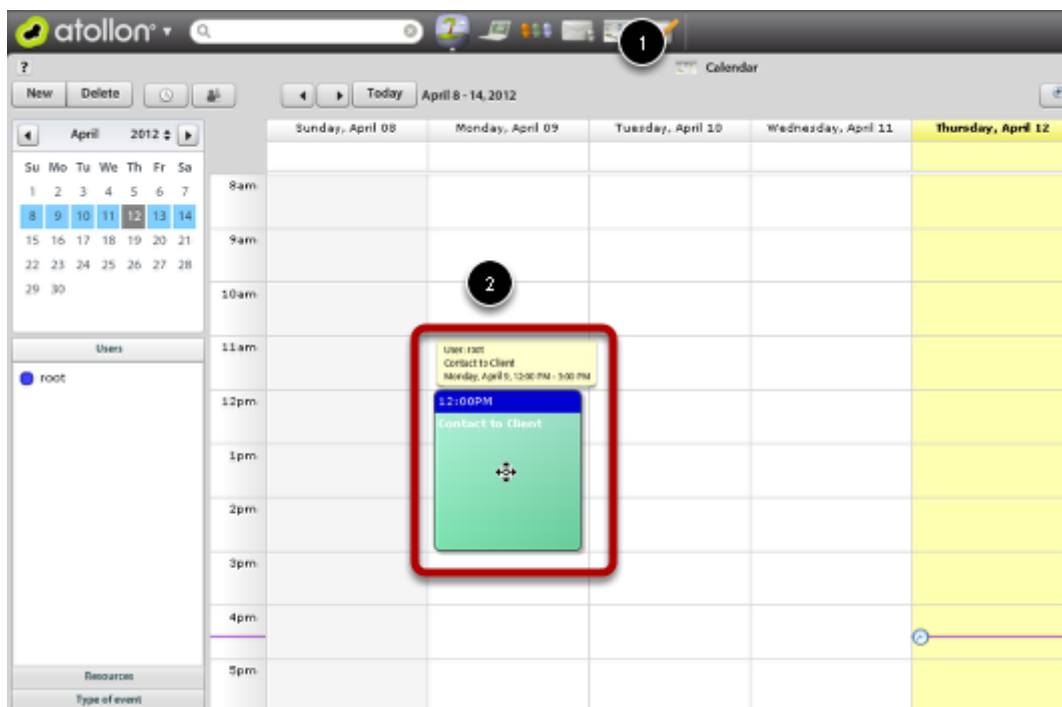
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Typical Sales use Cases

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

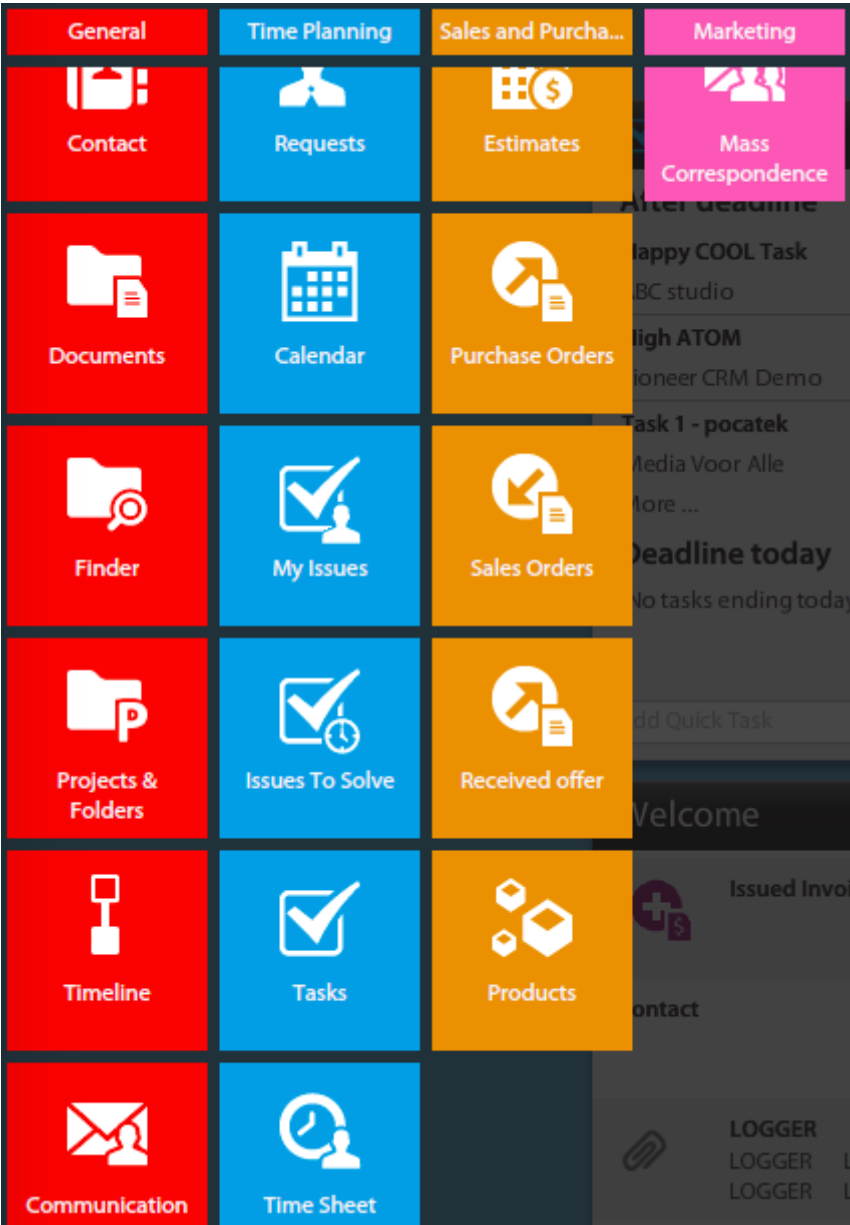
New event on Sales opportunity

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

Create new Deal and send Estimate

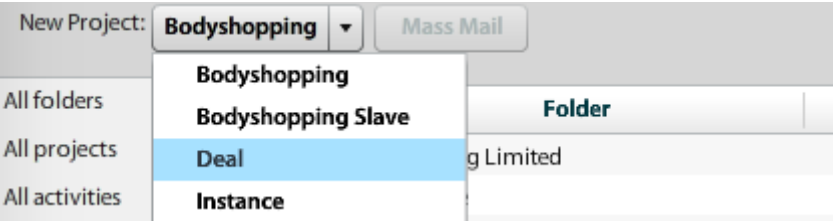
This wizard will show you how one of the ways to create and use Deals (or **Sales Opportunity**) in Atollon.

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 displays 'Expected close date' (03/14/2020), 'Probability', 'Provider' (Pioneer CRM Demo), and 'Invoice to'. The 'Estimate' window is titled 'Estimate' and contains the following fields:

- Context: * First American > Great Deal
- Status: * Vystav
- Number: [text field]
- External number: [text field]
- Journal: Cenová kalkulace
- Currency: CZK 1
- Issued date: 03/
- Valid until: 03/

Below these fields are expandable sections for 'Supplier: Pioneer CRM Demo, City, Country', 'Customer: First American', 'Comment:', and 'Custom attributes:'. A table lists the items:

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

At the bottom of the 'Estimate' window, there are buttons for '+ Product(s)', 'X', '%', 'Controlling', and 'Mass change'. The 'Attachments' section includes '+ Local file(s)'. The bottom right corner shows the summary: 'Discount: 0.00% Total: CZK 5,600.00 Incl. VAT: CZK 6,776.00'. At the very bottom of the 'Business Case' window, there are buttons for 'Create Invoice', 'Create Estimate', 'Create Sales Order', and '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.

Mass Mail

Atollon provides you with **personalised mass mail feature**. Don't ever send unpersonal mass mail.

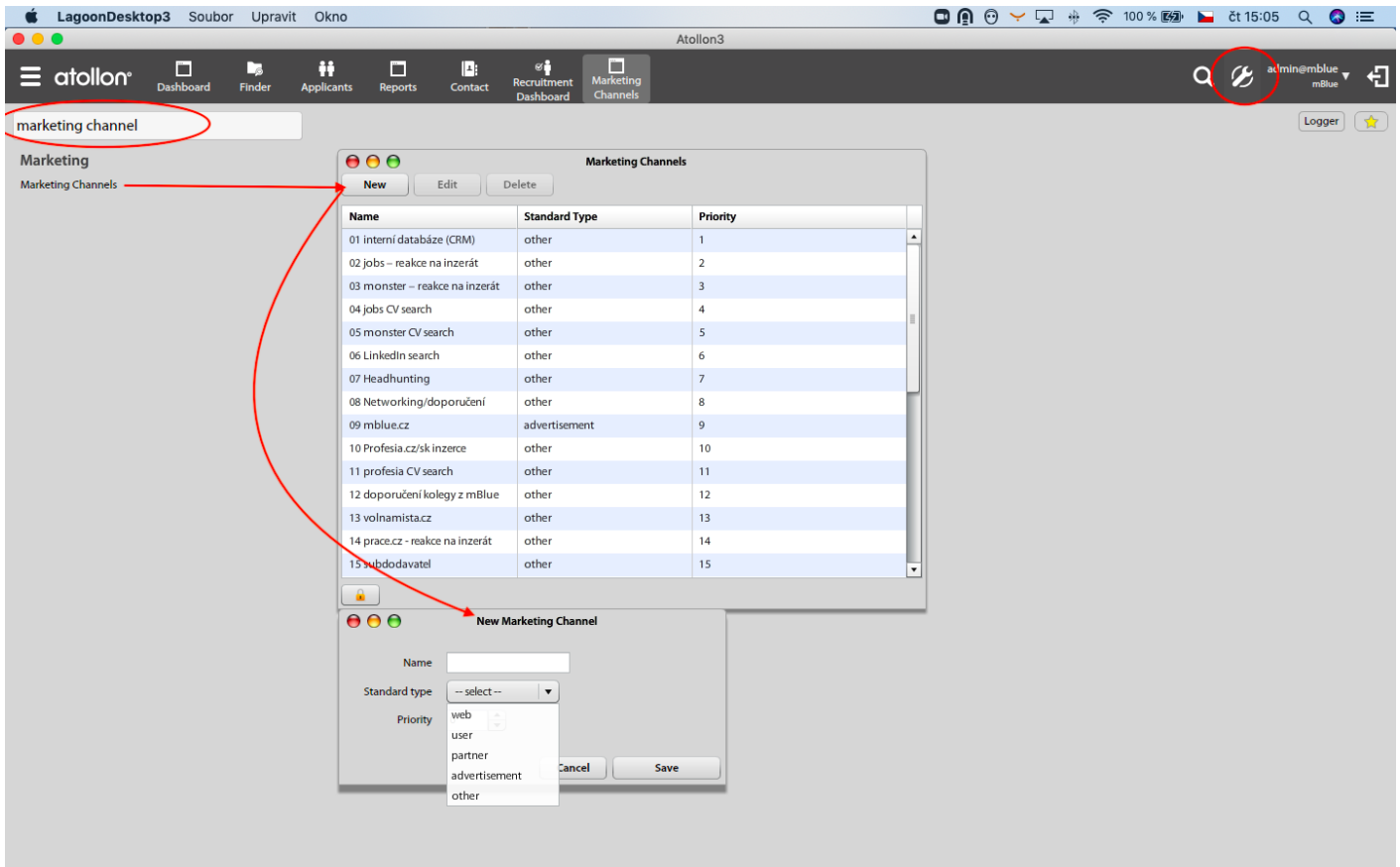
See how to work with this feature:

https://www.youtube.com/embed/WCV_hfcxl9g

Marketing channels

How to proceed with creating new Marketing channels:

1. Create Marketing Channel of your choice.

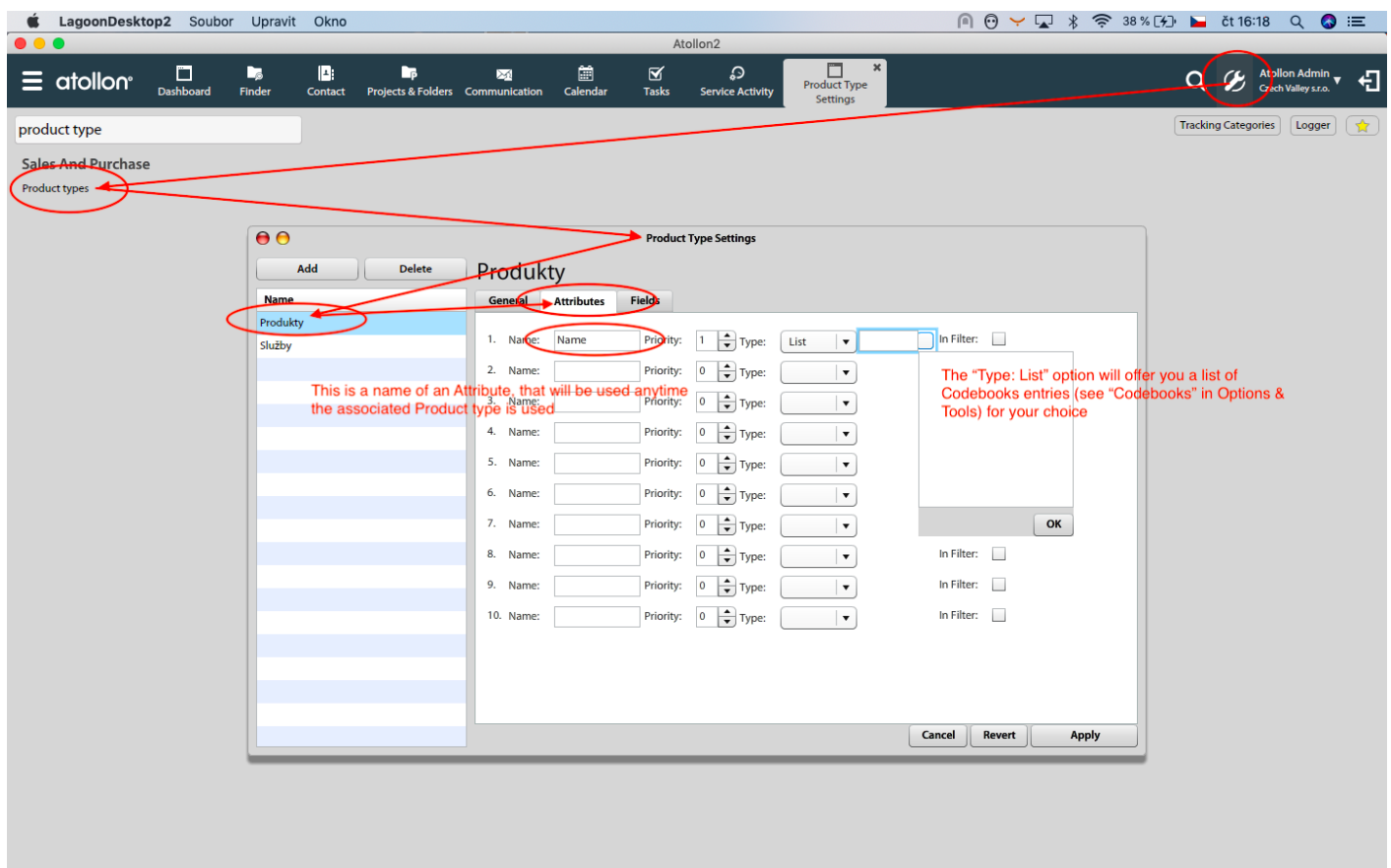


2. Couple the selecting Marketing Channel with appropriate Tracking Code, create New text Tracking Code when necessary and then couple them.

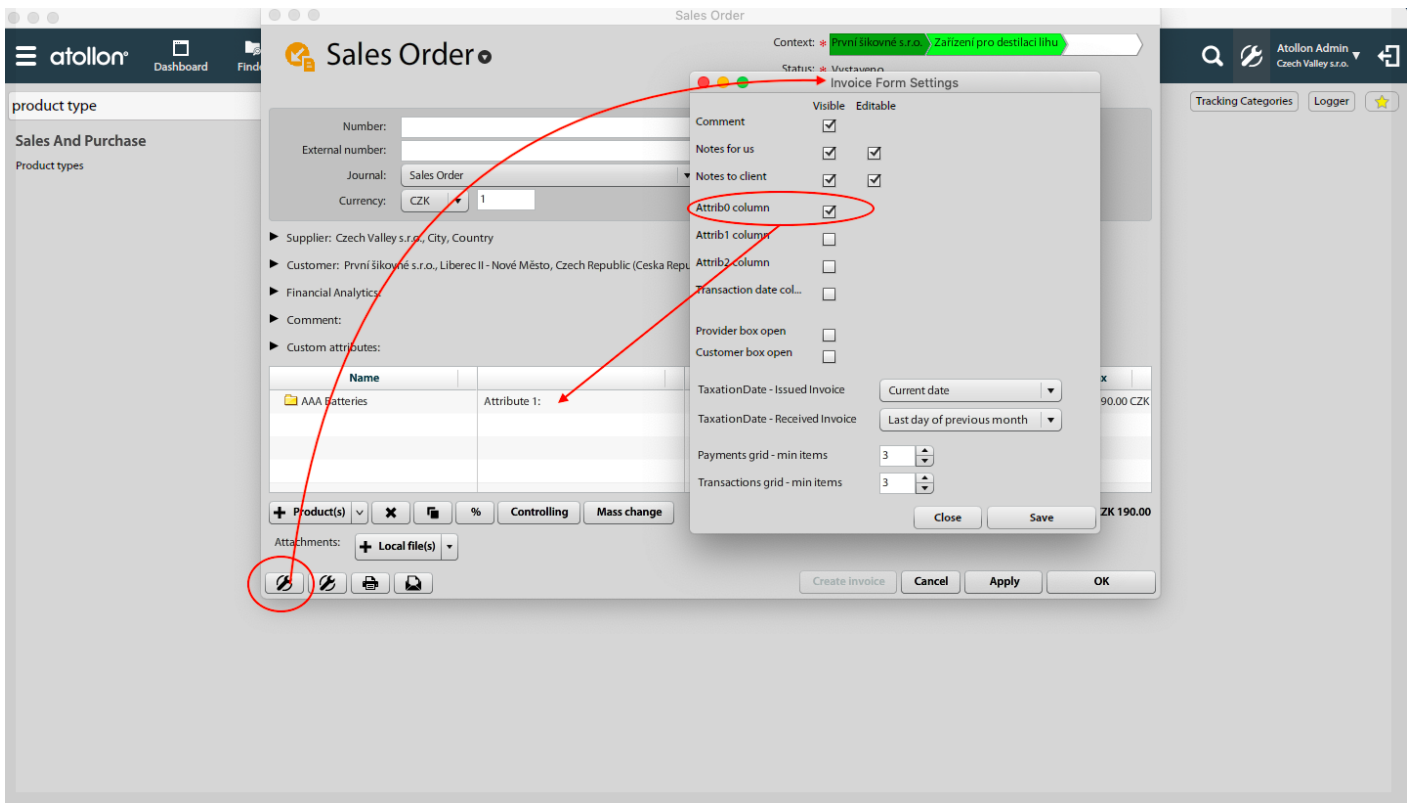
How to setup Product Attributes for Sales Order

This page provides you with the guidance, how to setup Product Attributes and how they are used in Sales Order setting, when appropriate.

1. Go to **Options & Tools** and choose **Product types**. The dialog will guide you through definition of different product types, they are used in the instance. The main goal is to setup appropriate product type's **Attributes** for specific **Product type**, that's used by **Product** component.



2. Go to **Sales Orders** component in order to assure that chosen **Attribute** will always appear in the Sales Order dialog for specific Product type/ Product.



3. By double click the product's **Name** you will enter detailed product dialog, where you can choose appropriate **Attribute** from available dropdown menu. The menu provides you with set of attributes from the **List**, as defined above (**Product type Setting**). Different choice of **Attribute Type** (different from **List** in our example) will offer you the selected choice (e.g. plain text, when **Text** selection is used).

