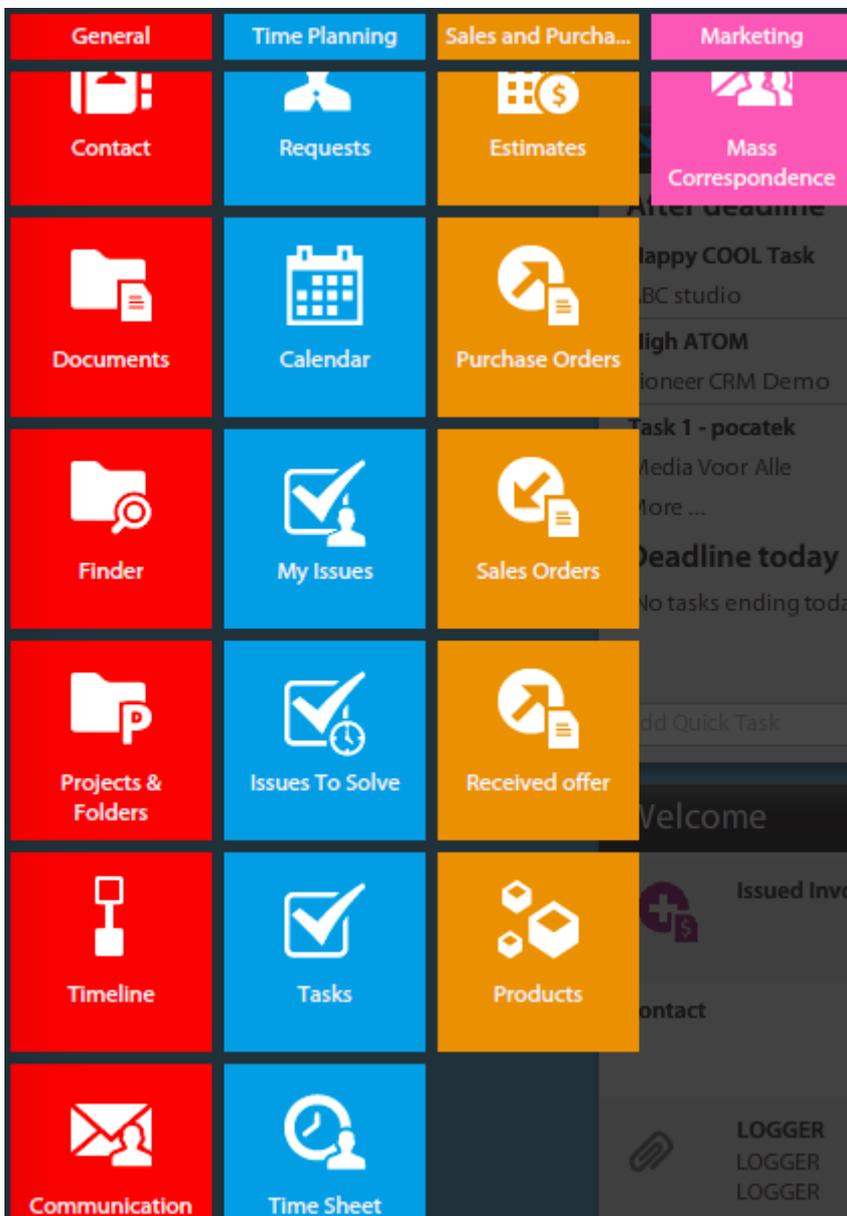


# Create new Deal and send Estimate

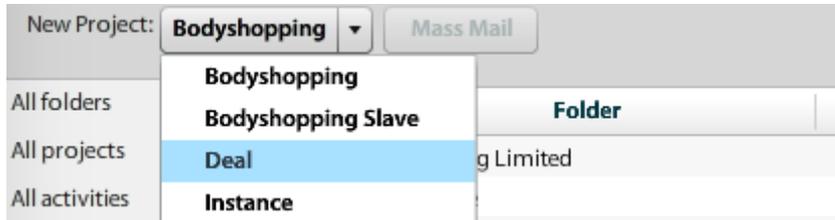
This wizard will show you how one of the ways to create and use Deals (or **Sales Opportunity**) in Atollon.

## 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.

The screenshot shows the Atollon CRM interface with a table of deals. The table has the following columns: Icon, Deal #, Client, Deal name, Status, Owner, Last marketing tr..., Last contacted, and Deal value. The data rows are as follows:

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;"> <span>Item: <input checked="" type="checkbox"/> Action Camera</span> <span>Context: * First American &gt; Great Deal</span> </div> <p>Name: Action Camera</p> <p>Billing Date: 03/14/2020</p> <table border="0"> <tr> <td>Purchase:</td> <td>4,500</td> <td>EUR</td> <td>Margin (%):</td> <td>24.44</td> </tr> <tr> <td>Catalog Price:</td> <td>5,600</td> <td>EUR</td> <td>Discount (%):</td> <td>0.00</td> </tr> <tr> <td></td> <td></td> <td></td> <td>Discount 2 (%):</td> <td></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

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  
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.

Revision #2

Created 14 March 2020 12:20:34 by Jan Safka

Updated 17 September 2022 17:03:46 by Jan Safka