



**Pulse Sales**

**User Guide**

**Updated November 2015**



## **CONTENTS**

---

|  |           |
|--|-----------|
| <b>1. Introduction to Sales</b>                    | <b>2</b>  |
| <b>2. A Few Basics</b>                             |           |
| <b>2.1 Terminology</b>                             | <b>2</b>  |
| <b>2.2 Logging onto Pulse</b>                      | <b>3</b>  |
| <b>2.3 My Front Page</b>                           | <b>3</b>  |
| <b>2.4 Client Search</b>                           | <b>5</b>  |
| <b>2.6 New Client</b>                              | <b>6</b>  |
| <b>3. The Sales Opportunity</b>                    |           |
| <b>3.1 How to ADD an Opportunity</b>               | <b>7</b>  |
| <b>3.2 How do UPDATE a Task</b>                    | <b>9</b>  |
| <b>3.3 The Opportunity Status</b>                  | <b>11</b> |
| <b>3.4 Opportunity Stages and Stage Conditions</b> | <b>12</b> |
| <b>4. The Sales Pipeline</b>                       | <b>13</b> |

## 1. INTRODUCTION TO PULSE SALES MODULE

The PULSE Sales module is designed to streamline the sales cycle and provide you with the tools to better manage your sales team and your sales opportunities.

Since PULSE modules share a common data platform, as a sales person, you have access to valuable information about your customer. For example, equipment and service history - information that can lead to further sales opportunities. PULSE Sales maximises your time by scheduling tasks and reminders, assisting to prioritise and refine your efforts. Quotations and proposals form part of the integrated package.

All of this fortifies pro-active management of both existing and new customer relationships and in turn increases sales-force productivity and bottom-line results. From a manager's viewpoint, the sales pipeline, or funnel, can be analysed in terms of groups such as sales-person, team, market sector, or value. This provides critical inputs into the planning cycle, and gives you a valuable tool for accurate forecasting and productivity reports.



## 2. A FEW BASICS

### 2.1 Terminology

**The terms below are explained in more detail in the user guide:**

- ◆ **Opportunity** - a sales lead or potential sale
- ◆ **Task** - an activity related to a sales lead that must be performed by the assigned sales consultant
- ◆ **Status** - the lead can be live (active) or stagnating (inactive) or dead (lost)
- ◆ **Stage** - the progress a lead makes from when first identified to becoming a won deal
- ◆ **Stage Conditions** - conditions that must be met before allowing a lead to progress from one stage to another
- ◆ **Sales Pipeline** - funnel or graph depicting the quantity (and value) of leads by stage

## 2.2 Logging onto Pulse

Using your Sales web address, log onto Pulse using an internet browser.



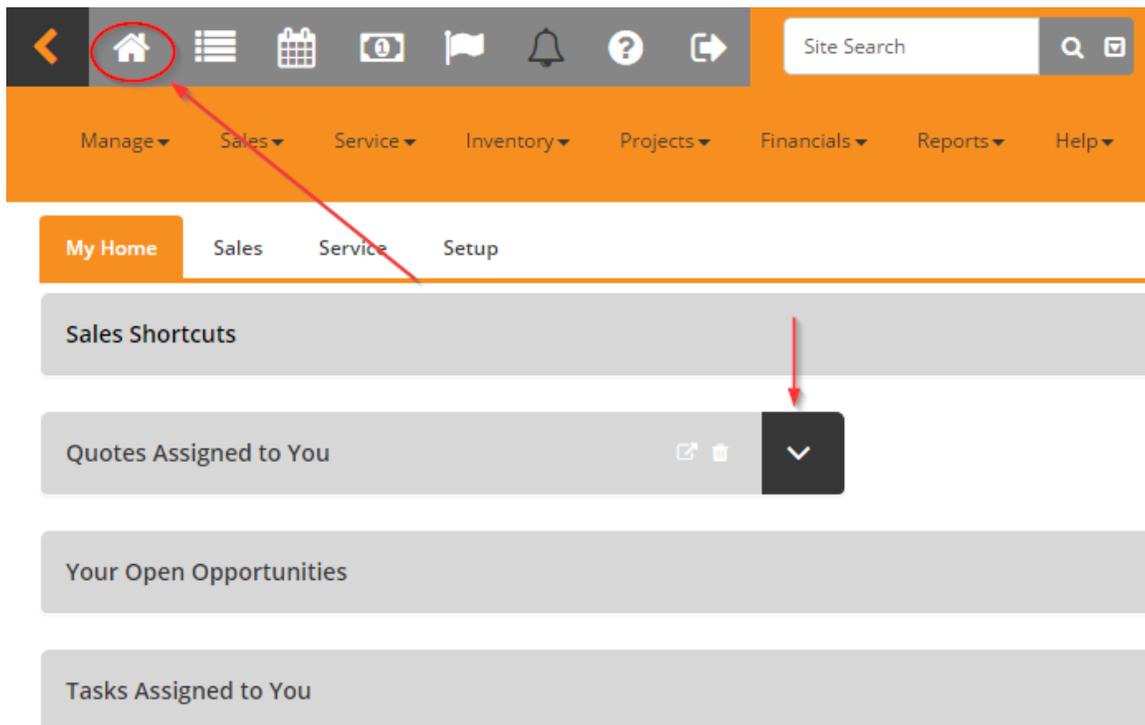
**Log on using your allocated user name and password.**

Your password can be changed once you are logged in.

## 2.3 My Front Page

**This is your FRONT PAGE or home page:**

Clicking on the Home icon will take you back to the front page at any stage. Sales dashboards have been set up for you already. You can expand and contract these using the little down arrow as indicated below.



You can personalize your front page by clicking the "Setup" tab. The following screen will come up. Tick the appropriate boxes of the information that you would like to see. Click "Save".

Management menu: Manage, Sales, Service, Inventory, Projects, Financials, Reports

Navigation: My Home, Sales, Service, **Setup**

Section: Front Page

Buttons: Save

Configuration Tabs: My Home Tab, General Tab(s)

| Tab       | Box                          | Use                      | List Order                     | Height                              | Refresh Interval (secs)        |
|-----------|------------------------------|--------------------------|--------------------------------|-------------------------------------|--------------------------------|
| Financial | Assigned Invoices            | <input type="checkbox"/> | <input type="text" value="0"/> | <input type="text" value="350"/> px | <input type="text" value="0"/> |
|           | Value of Top Quotations Sent | <input type="checkbox"/> | <input type="text" value="0"/> | <input type="text" value="350"/> px | <input type="text" value="0"/> |
|           | Cash Payment Scoreboard      | <input type="checkbox"/> | <input type="text" value="0"/> | <input type="text" value="120"/> px | <input type="text" value="0"/> |
|           | Assigned Cash Payment        | <input type="checkbox"/> | <input type="text" value="0"/> | <input type="text" value="350"/> px | <input type="text" value="0"/> |

By clicking back to your home page you can now click on the various headings for quick access to your tasks, sales opportunities etc. See below:

Navigation: **My Home**, Sales, Service, Setup

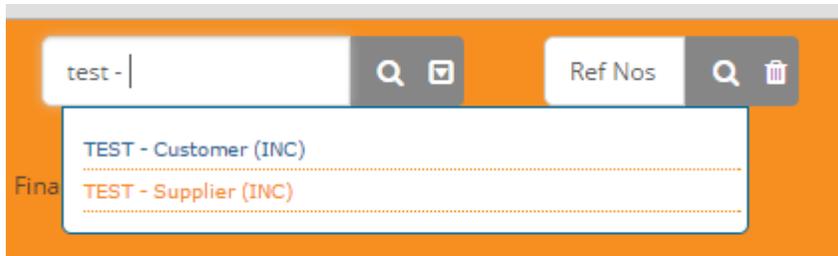
Section: Sales Shortcuts

Shortcuts:
 

- New Opportunity
- New Quotation
- View Open Quotes

## 2.4 Client Search/Updating & Maintaining Clients

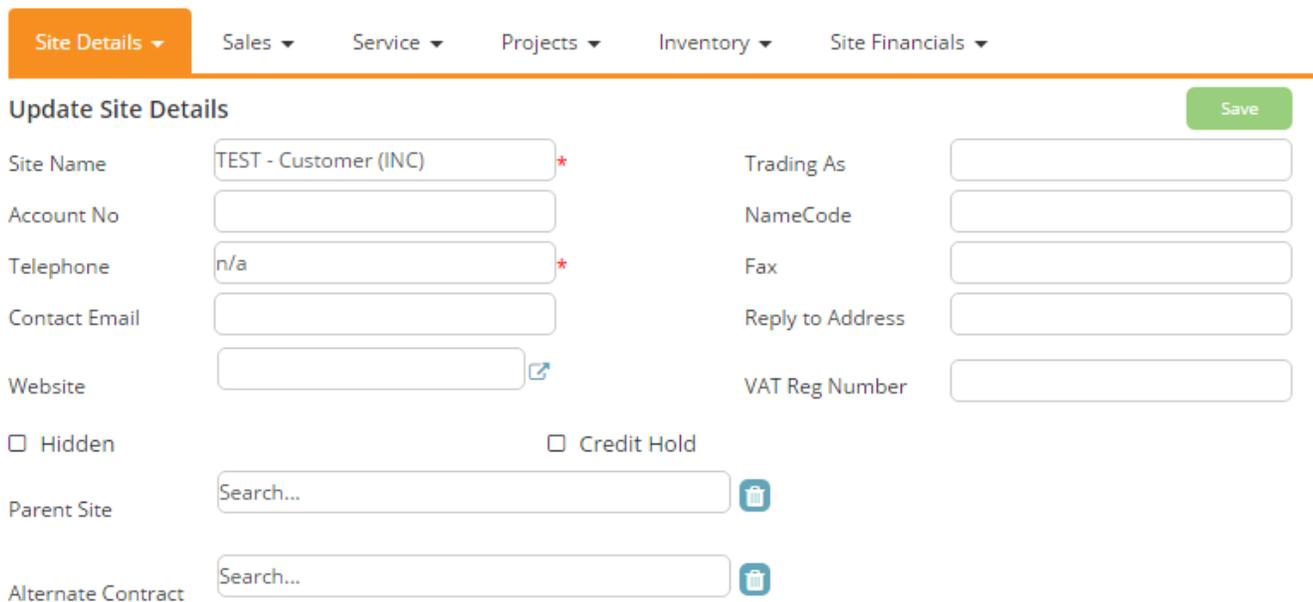
To search for an existing customer, type in their name using the "Customer Search" field. Select from the list.



The screenshot shows a search interface with a search bar containing the text "test -". To the right of the search bar are icons for search and a dropdown arrow. Below the search bar, a dropdown menu is open, displaying two options: "TEST - Customer (INC)" and "TEST - Supplier (INC)". The word "Final" is visible on the left side of the dropdown menu.

Click on the "Site Details" tab, and select Update Site Details to add or amend particulars of that client. Click on SAVE

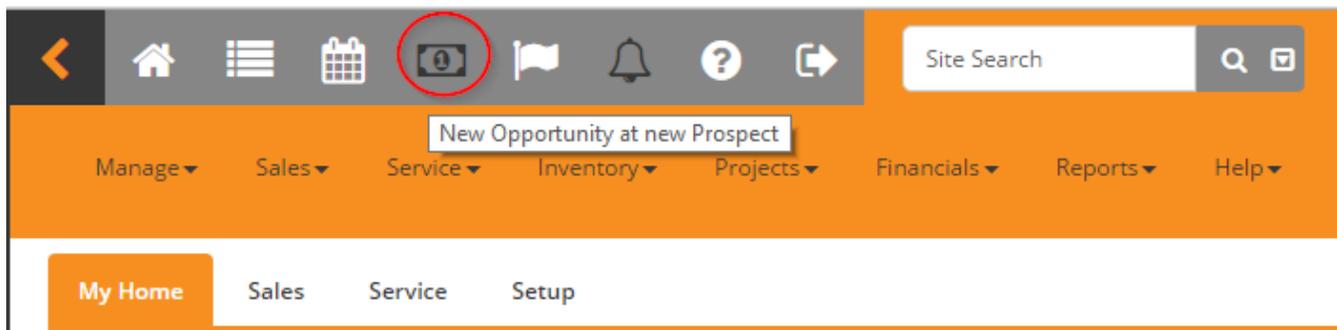
## TEST - Customer (INC) - / Update (Site Details / Update)



The screenshot shows the "Update Site Details" form for the client "TEST - Customer (INC)". The form is organized into two columns. The left column contains fields for Site Name (filled with "TEST - Customer (INC)"), Account No, Telephone (filled with "n/a"), Contact Email, Website, and checkboxes for "Hidden" and "Credit Hold". The right column contains fields for Trading As, NameCode, Fax, Reply to Address, and VAT Reg Number. At the bottom, there are search fields for "Parent Site" and "Alternate Contract". A green "Save" button is located in the top right corner of the form area.

## 2.5 New Client

For a new opportunity at a new client, you can use the Quick Add page which you can access with this icon.



This allows you to capture a new site, a contact person and the details of the opportunity in one place.

### New Opportunity

#### Site Information (Head Office)

Save Opportunity

Site Name (autosearch)   \*

Identified On  \*

Trading As

Telephone  \*

Physical Address

Phys Code  Post Code

#### Main contact for this Opportunity (You can add more contact people once the opportunity is captured)

First Name  \* Surname

Contact Email  Contact Telephone No.  \*

Contact Mobile No.

Main Sales Contact at Site  Job Title/Position

#### Information About This Opportunity

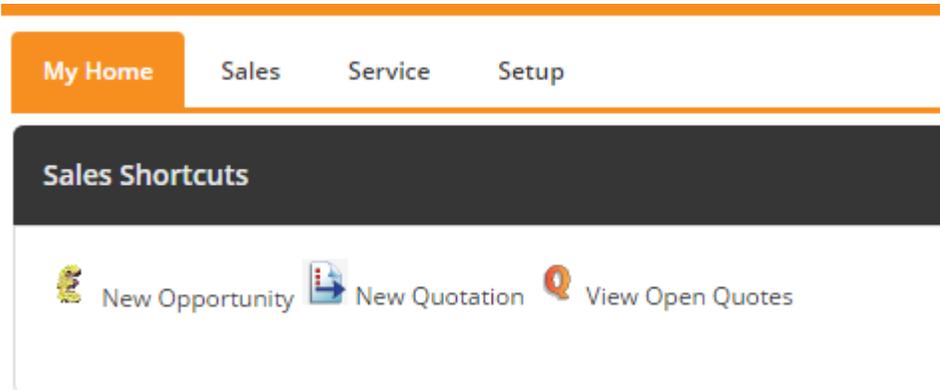
Currency  \* Opportunity Source  \*

### 3. THE SALES OPPORTUNITY

#### 3.1 How to ADD a New Opportunity

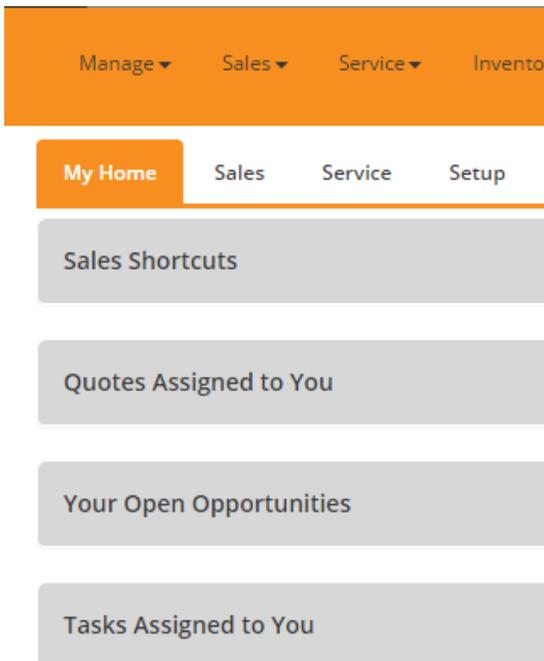
Using the Quick Add described above, you can either fill in a new site name or an existing site. Pulse will search while you type in the search box to suggest existing sites. You would then fill out the Quick Add form as usual. SAVE when you are finished.

Alternately, you could use the New Opportunity icon on your Home page which will bring up a similar form.



**Fields marked \* are mandatory.**

On SAVING, the new opportunity as well as new tasks related to that opportunity will be listed on your front page when you expand the different dashboards.



You can open the Opportunity by clicking on the hyperlink of the Opportunity name.

## Your Open Opportunities

Page 1 of 1 [Show All Pages](#)

| Ref No | Client  | Identified On | Opportunity Name                        | Stage                 | Status |
|--------|---|---------------|---|-----------------------|--------|
| 517    | <a href="#">ACME Cartoons (demo RVR)</a>      | 14 Aug 2014   | Installation of Wi-Fi in Bristol branch | Short-Listed          | Live   |
| 516    | <a href="#">proect happy</a>                  | 14 Aug 2014   | Installation of new WI-Fi               | Qualified Opportunity | Live   |
| 60     | <a href="#">Happy Harry's Toy Shop (TEST)</a> | 07 May 2014   | xxx                                     | Suspect               | Live   |
| 15     | <a href="#">RVR test new prospect</a>         | 28 Jan 2014   | *services (RVR for training)            | Verbal Award          | Live   |

Now you can **complete the rest of the information** for this opportunity. The information contained in this page filters through to the reports and the Sales Pipeline.

**This is the main Opportunity Details page.**

The tabs relating to the opportunity are as follows, and will be covered in the next section.

## ACME Cartoons (demo RVR) - / Opportunities (Sales / Opportunities)

Site Details ▾ Sales ▾

[Opportunity Details](#) [Tasks/Notes](#) [Stage History](#) [Status History](#) [Event](#)

Update Opportunity Ref. No 517 ACME Cartoons (demo RVR) [Save](#)

Current Stage: Short-Listed (50% Probability of Closing)

|                         |   |                       |                      |
|-------------------------|---|-----------------------|----------------------|
| Opportunity Type        | Pound ▾   | Identified On         | 14 Aug 2014  15:18 * |
| Opportunity Name        | Installation of Wi-Fi in Bristol branch *           | Expected Start Date   | 30 Sep 2014  00:00 * |
| Opportunity Description | They have a new branch in Bristol, and need Wi-Fi * | Expected Closing Date | 31 Aug 2014  00:00   |

Logged by Resource Admin Admin on 14 Aug 2014

**Workflow**

|            |                            |                    |  |
|------------|----------------------------|--------------------|--|
| Impression | Appear to favour Cisco kit | Opportunity Status | Live ▾ <input type="checkbox"/> Hidden |
|------------|----------------------------|--------------------|--|

**Stage Conditions**

- We have a e-mail or a call telling us we won the deal

#### Step 1:

On your front page, click on the Task you want to update by clicking "Respond"

Tasks Assigned to You

Sales Tasks Assigned to me [ Sales Tasks assigned by me ]

Page 1 of 1 Show All Pages

| Ref No | Client                        | Opportunity Name                 | Due Date    | Description                 | ContactPerson | Assigned By | Respond |
|--------|-------------------------------|----------------------------------|-------------|-----------------------------|---------------|-------------|---------|
| 7      | Teneo - Customer (GBP)        | *Contract Renewal - 1000342-0000 | 17 Jul 2012 | Follow up and find out more | Mark Sollars  | Admin Admin | Respond |
| 69     | Happy Harry's Toy Shop (TEST) | xxx                              | 14 May 2014 | Follow up and find out more | xxx           | Admin Admin | Respond |

#### Step 2:

Fill in the Quick Capture form as shown below, and click Save.

Task Actions - Google Chrome

Save

Task Actions Capture Form

Site Contact xxx

Description of task Follow up and find out more

Actions date 13 Nov 2015

Resource Admin Admin

Task Type E-mail \*

Actions description

Stage Conditions - This task resulted in:

- Identified Competition/Incumbents
- Identified Decision-makers
- Identified Scope of Service
- Identified Timelines
- Financials

#### Step 3:

What's next for this opportunity? This "Assign New Sales Task" pops up automatically. Fill in as below.

If you need to assign the next task to someone else in your team, change the "Assigned To". In the same manner, change the User, Task Type, Due By etc. as required. SAVE

Opportunities  Save

Date Assigned   Assigned By

Assigned To  Site Contact  +

Task Type  \* Due By

Task

(0) \* Save

All of the above can also be done directly on the customer site – remember that everything is centrally stored.

## Happy Harry's Toy Shop (TEST) - 00000336 /

Site Details ▾ Sales ▾ Service ▾ Projects ▾ Inventory ▾ Site Financi

Opportunities

| Identified On        | Ref No | Opportunity Name |
|----------------------|--------|------------------|
| 07 May 2014 09:12:00 | 60     | xxx              |

### 3.3 The Opportunity Status

Opportunities can be in 3 statuses: LIVE, STAGNATING or DEAD.  
Dead opportunities are not shown in the Sales Pipeline.

In the case where the opportunity is on hold, the opportunity can be marked as DORMANT with a "go-live-again" date.

STAGNATING status is automatically set by the system when there hasn't been any Stage movement for a period of time.

#### Opportunity Status as listed below:

---

## ACME Cartoons (demo RVR) - / Opportunities (Sales / Opportunities)

---

Site Details ▾ Sales ▾

**Opportunity Details** | Tasks/Notes | Stage History | Status History | Event

Update Opportunity Ref. No 517 ACME Cartoons

Current Stage: Short-Listed (50% Prob)

|                         |   |   |                     |
|-------------------------|---|---|---------------------|
| Opportunity Type        | Pound ▾   | Identified On                                 | 14 Aug 2014 15:18 * |
| Opportunity Name        | Installation of Wi-Fi in Bristol branch *           | Expected Start Date                           | 30 Sep 2014 00:00 * |
| Opportunity Description | They have a new branch in Bristol, and need Wi-Fi * | Expected Closing Date                         | 31 Aug 2014 00:00   |
| Impression              | Appear to favour Cisco kit                          | Logged by Resource Admin Admin on 14 Aug 2014 |                     |

Workflow

Opportunity Status Live  
Live  
Dormant  
Lost  
Cancelled (Duplicate or error)

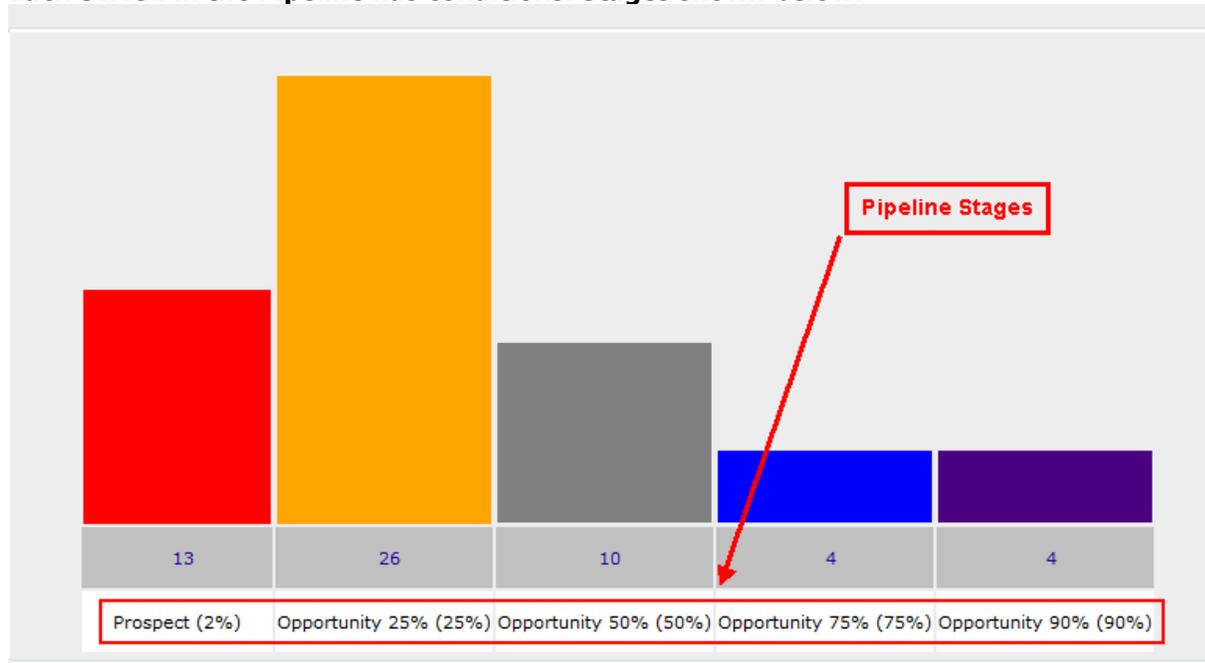
Stage Conditions  We have a e-mail or a

**Relates To** | Product/Values | Decision Makers | Category/Custom Field | Attachments

### 3.5 Opportunity Stages and Stage Conditions

As the Sales Opportunity progresses, it must be moved from an Unqualified Lead, to Qualified Lead, all the way through to the Won Stage. In order to do this, certain conditions must be met.

**Each STAGE in the Pipeline has conditions. Stages shown below:**



This can be done on the Opportunity Details tab / page

Opportunity Details | Tasks/Notes | Stage History | Status History | Event

Impression: Appear to favour Cisco kit

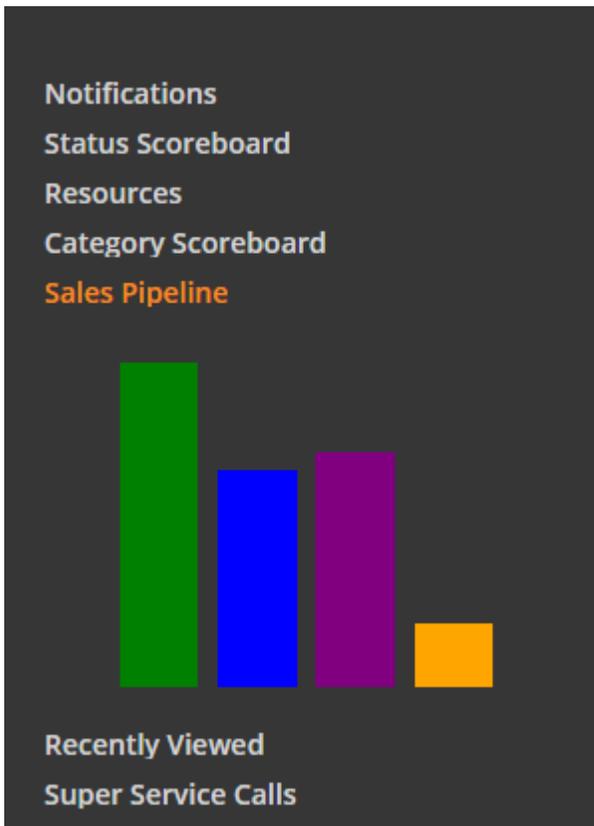
Opportunity Status: Live

**Stage Conditions**

- Suspect
- Identified Competition/Incumbents
- Identified Decision-makers
- Identified Scope of Service
- Identified Timelines
- Qualified Opportunity**
- Quotation sent to customer
- We are on the short-list
- Short-Listed [Current]**
- We have a e-mail or a call telling us we won the deal
- Verbal Award**
- Handed Over to Projects/Contracts
- PO Received

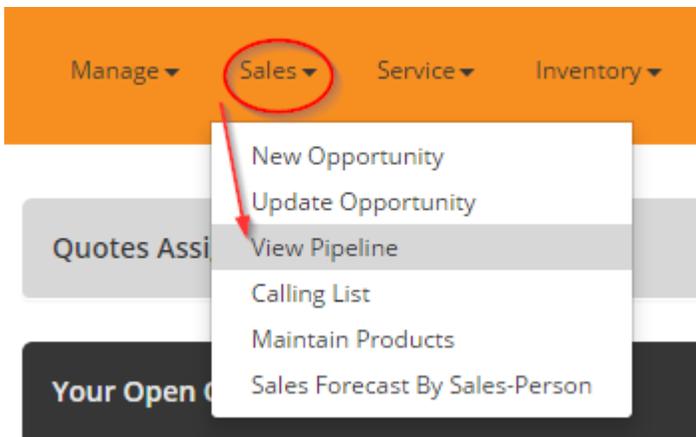
## 4. THE SALES PIPELINE

On the front page, there is a mini Sales Pipeline in the left hand tool bar. This is used for quick easy reference.



### Step 1:

To access the detailed Sales Pipeline, click on the Sales menu:



### Step 2:

Filter as required and click OK

Select Department: Sales

Select Opportunity Status: Live

Opportunity Source: E-mail Campaign

Product/Service: SMART Gold Level Support

Impact: -- All --

Referred By: No Referrer

Stages as at date: 17 Nov 2015

Identified after:

Identified before:

Deadline for Submissions after:

Deadline for Submissions before:

Printer-friendly:

List Opportunities:

Order Opportunities by: Identified On Date

OK

### This is the Sales Pipeline

The information entered on each opportunity is reflected in this pipeline report.



Below the pipeline, you will find a list of all the opportunities assigned to the resource in question.

