pulse

Business Software

Pulse Sales

User Guide

Updated November 2015

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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

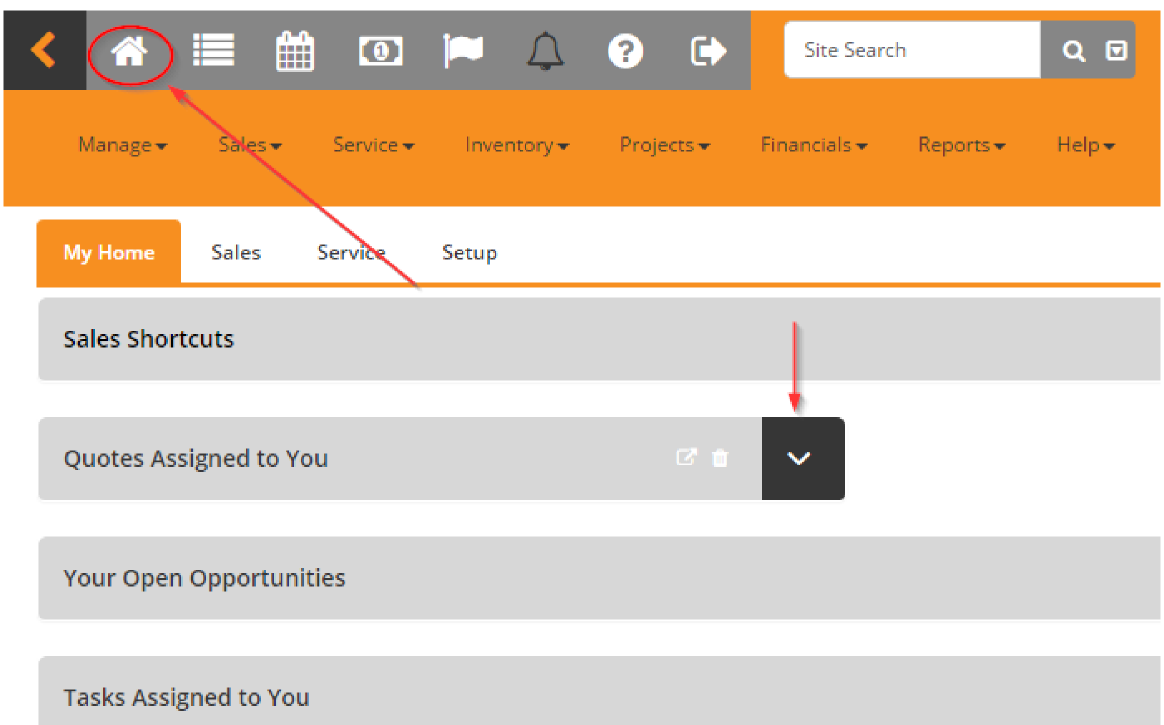
Using your Sales web address, log onto Pulse using an internet browser.

Log on using your allocated user name and password.
Your password can be changed once you are logged in.

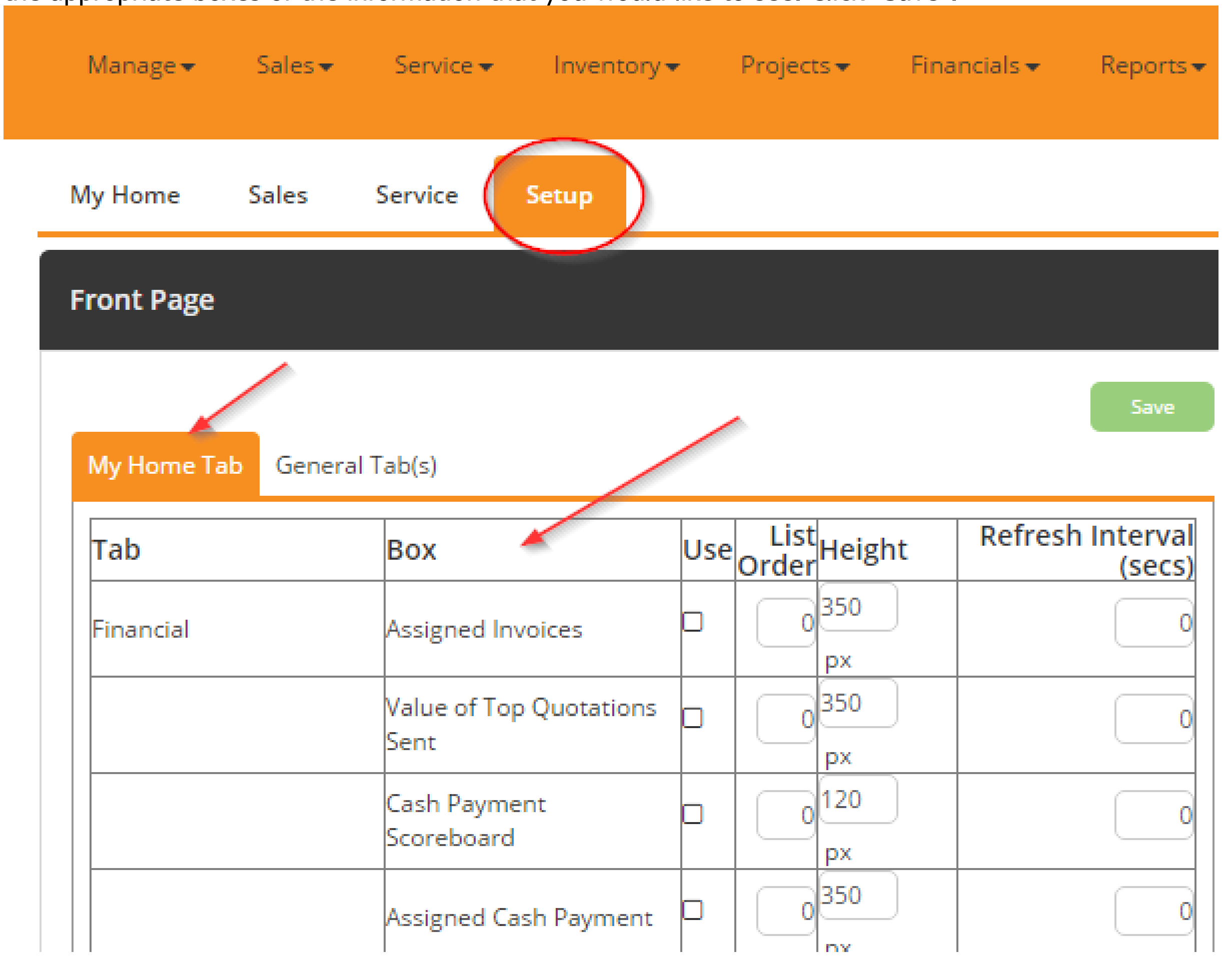
2.3 My Front Page

This is your FRONT PAGE or home page:

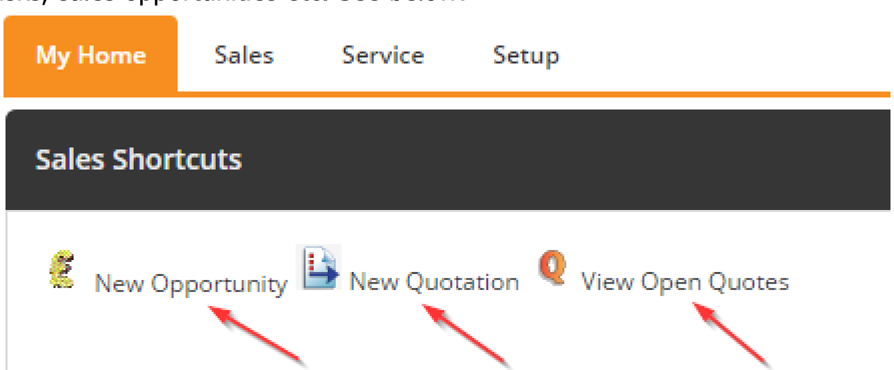
Clicking on the Home icon will take you back to the front page at any stage. Sales dashboards have been set up for you already. You can expand and contract these using the little down arrow as indicated below.



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”.

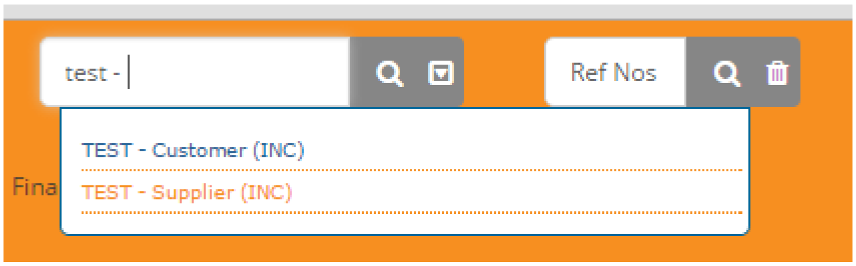


By clicking back to your home page you can now click on the various headings for quick access to your tasks, sales opportunities etc. See below:

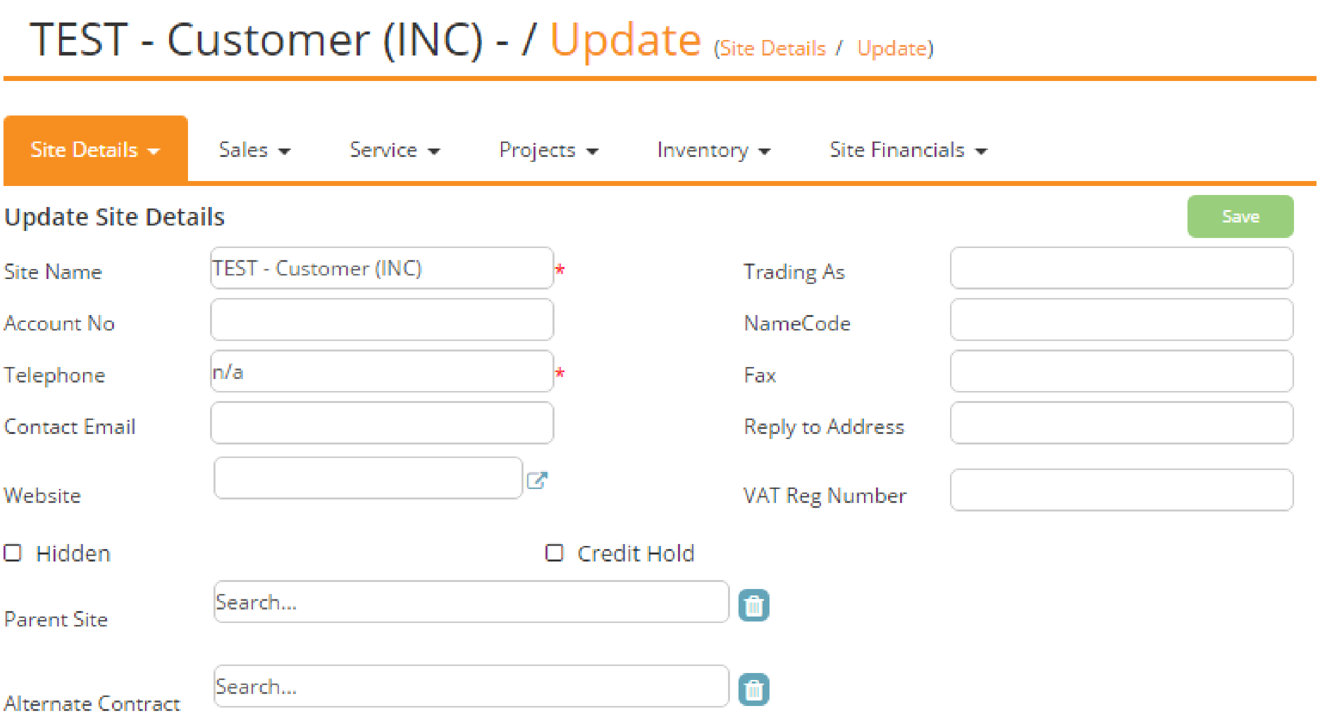


2.4 Client Search/Updating & Maintaining Clients

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

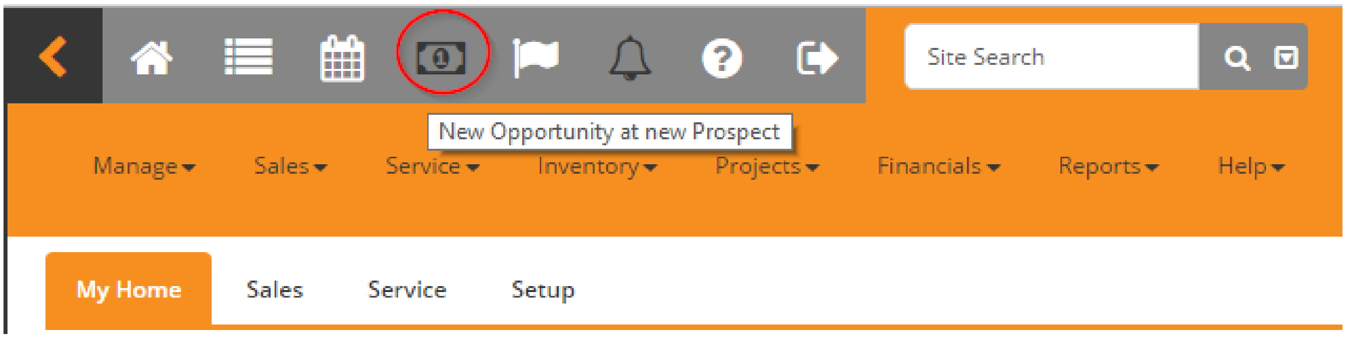


Click on the "Site Details" tab, and select Update Site Details to add or amend particulars of that client. Click on SAVE

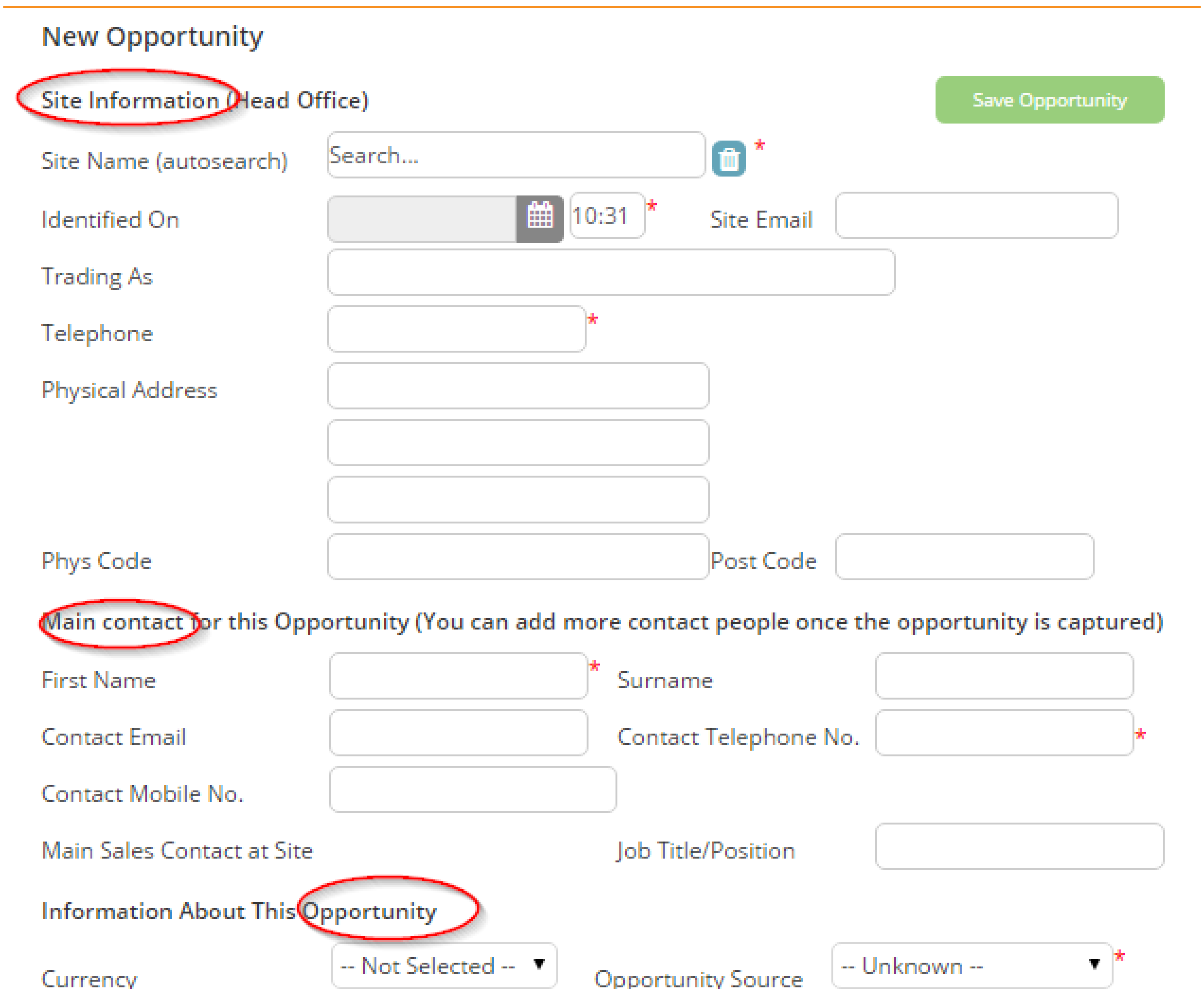


2.5 New Client

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.

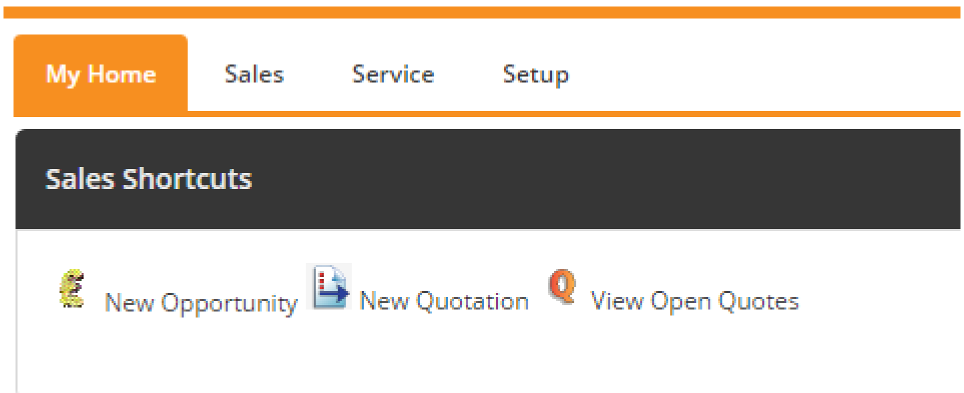


3. THE SALES OPPORTUNITY

3.1 How to ADD a New Opportunity

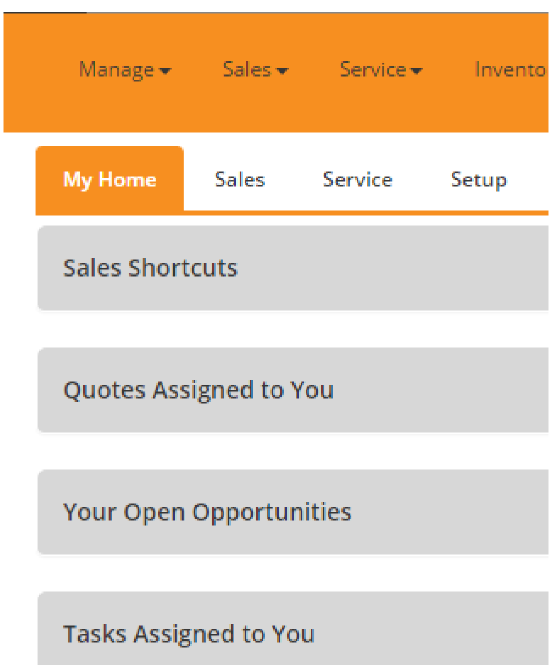
Using the Quick Add described above, you can either fill in a new site name or an existing site. Pulse will search while you type in the search box to suggest existing sites. You would then fill out the Quick Add form as usual. SAVE when you are finished.

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

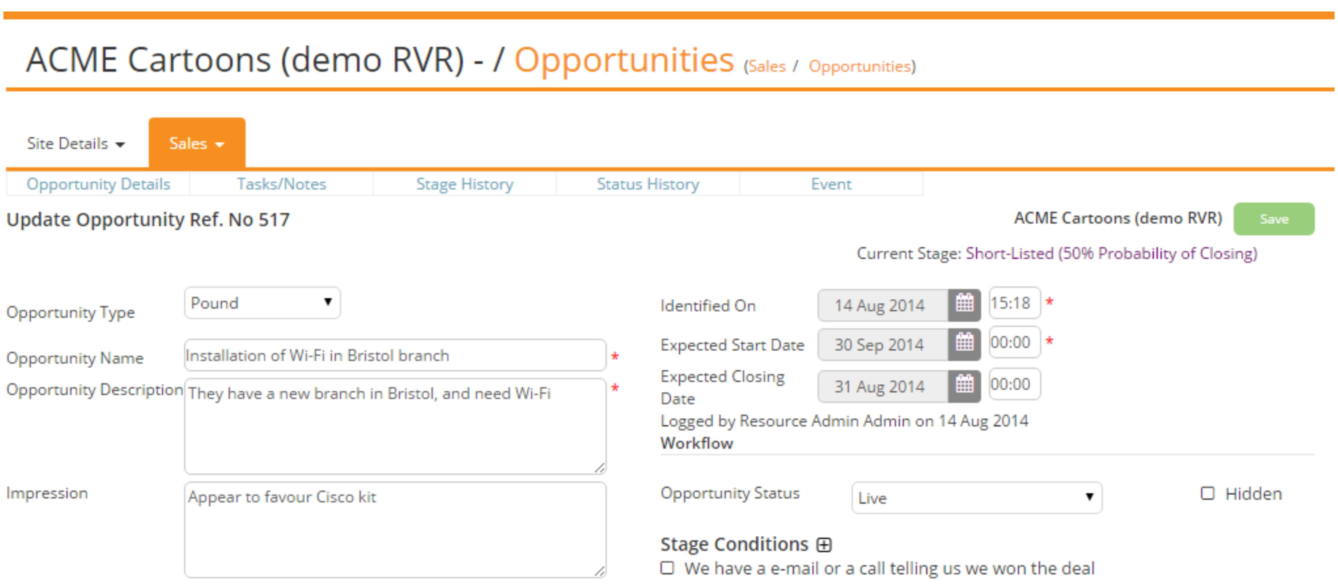
Page 1 of 1 Show All Pages

Ref No		Client	Identified On	Opportunity Name	Stage	Status
		- Filter -			- Filter -	- Filter -
517		ACME Cartoons (demo RVR)	14 Aug 2014	Installation of Wi-Fi in Bristol branch	Short-Listed	Live
516		proect happy	14 Aug 2014	Installation of new WI-Fi	Qualified Opportunity	Live
60		Happy Harry's Toy Shop (TEST)	07 May 2014	xxx	Suspect	Live
15		RVR test new prospect	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.

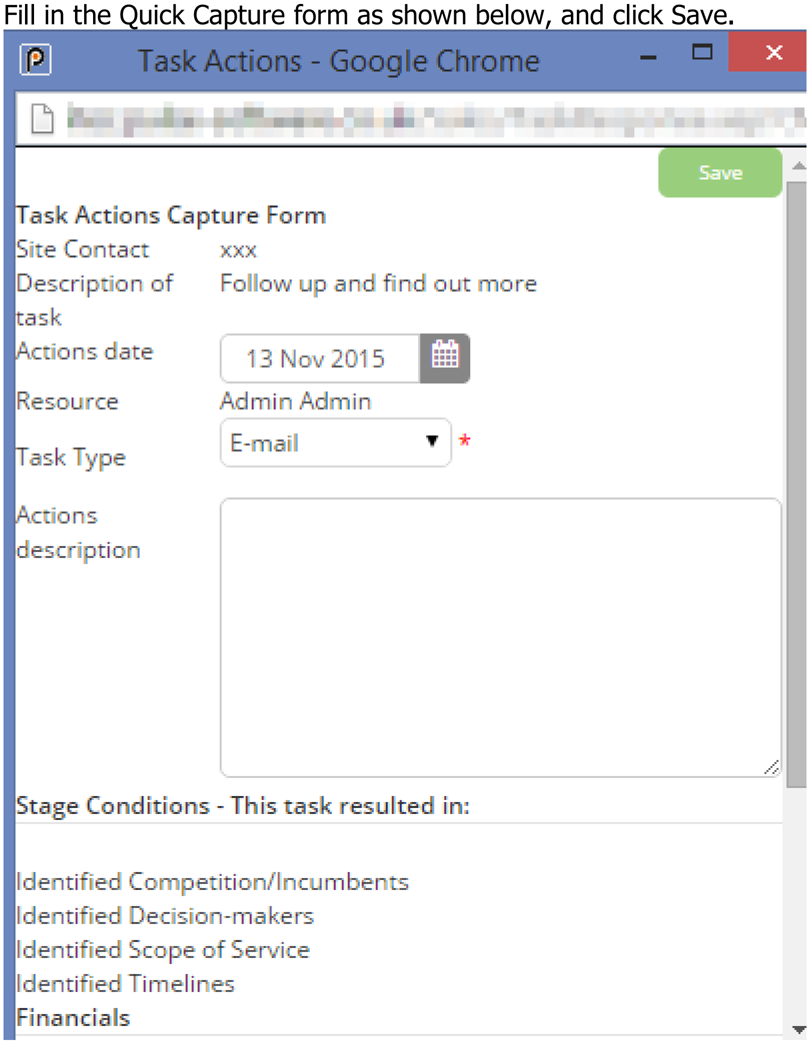


Step 1:

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

Step 2:

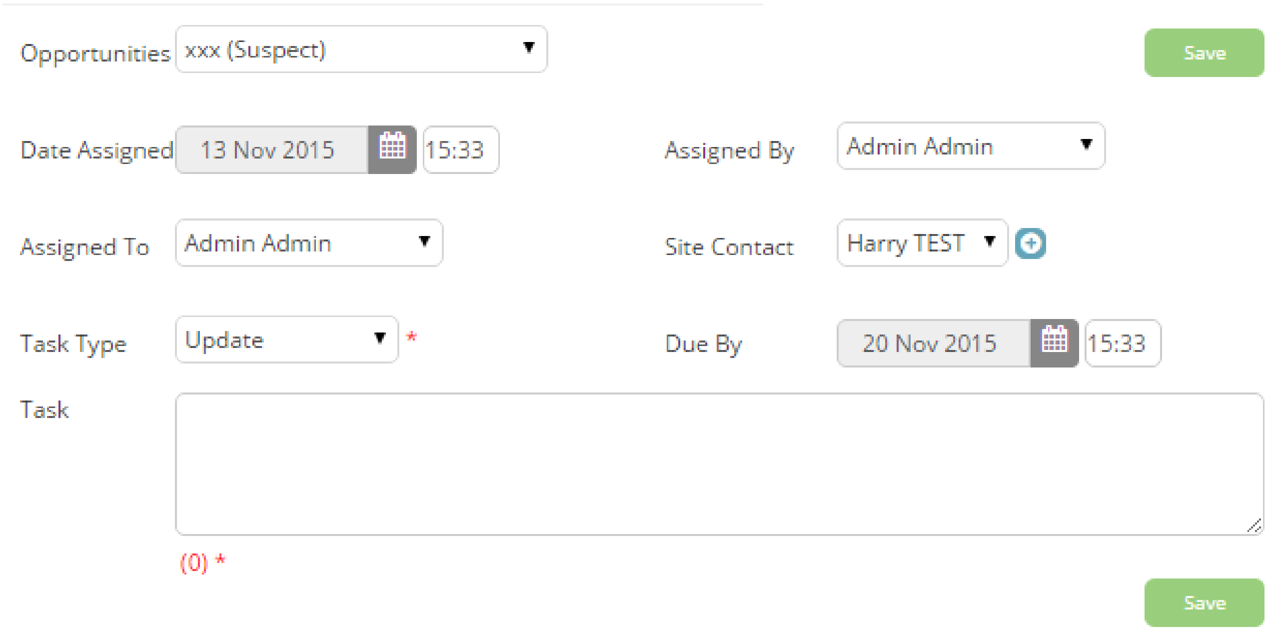
Fill in the Quick Capture form as shown below, and click Save.



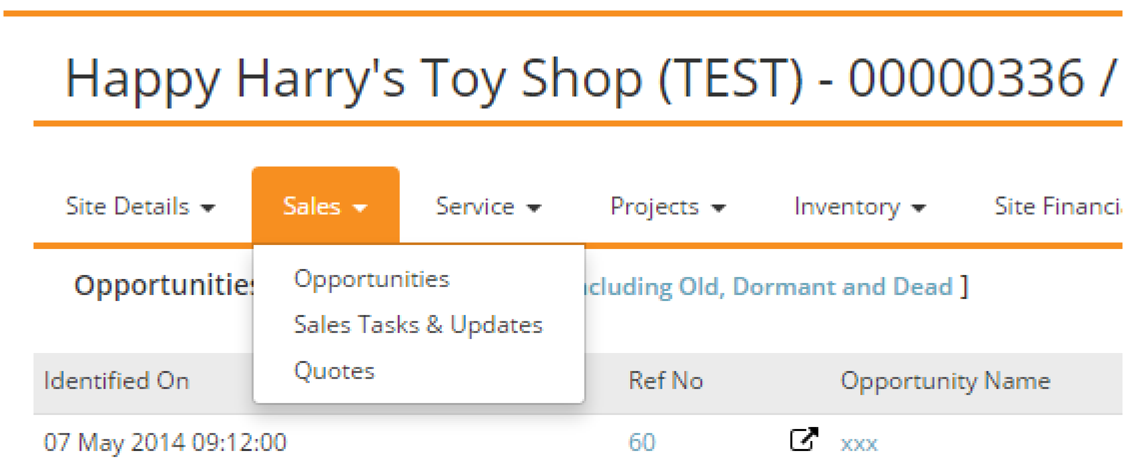
Step 3:

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



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

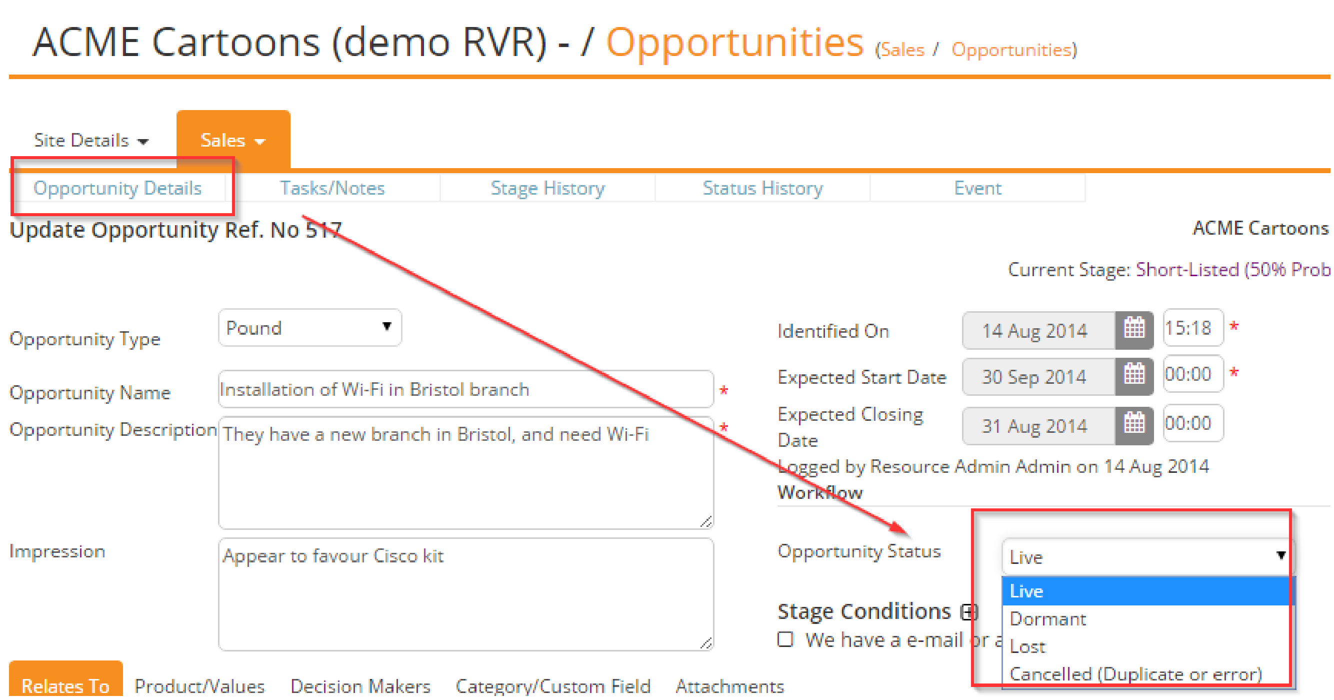


Opportunities can be in 3 statuses: LIVE, STAGNATING or DEAD.
Dead opportunities are not shown in the Sales Pipeline.

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

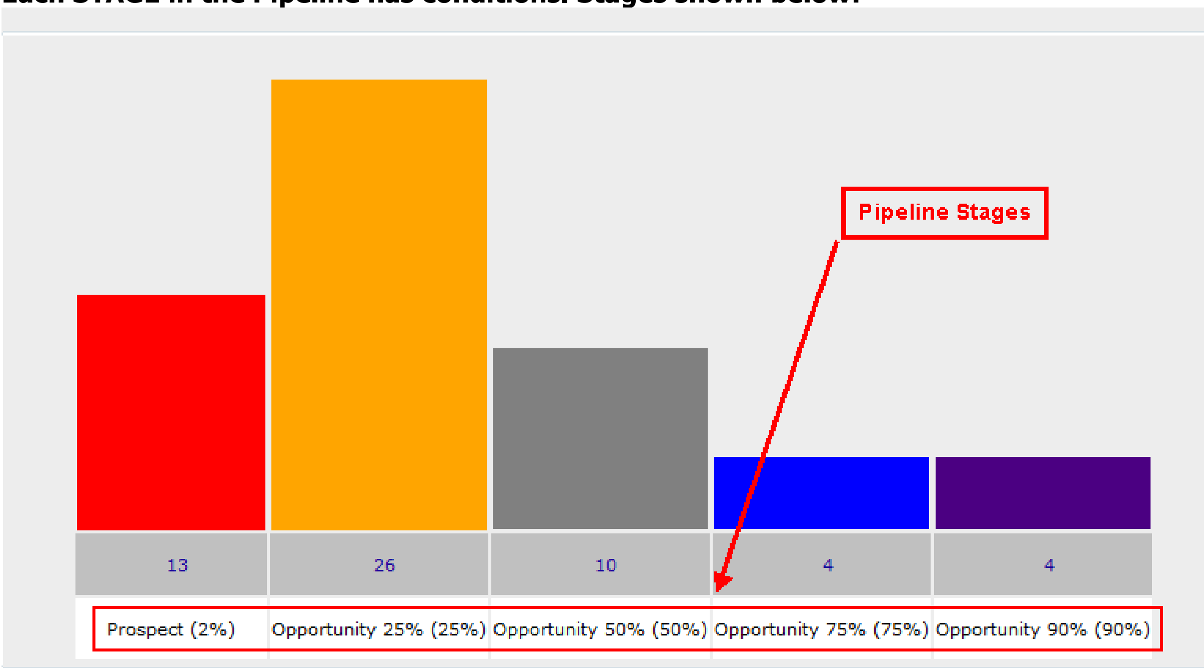
STAGNATING status is automatically set by the system when there hasn't been any Stage movement for a period of time.

Opportunity Status as listed below:

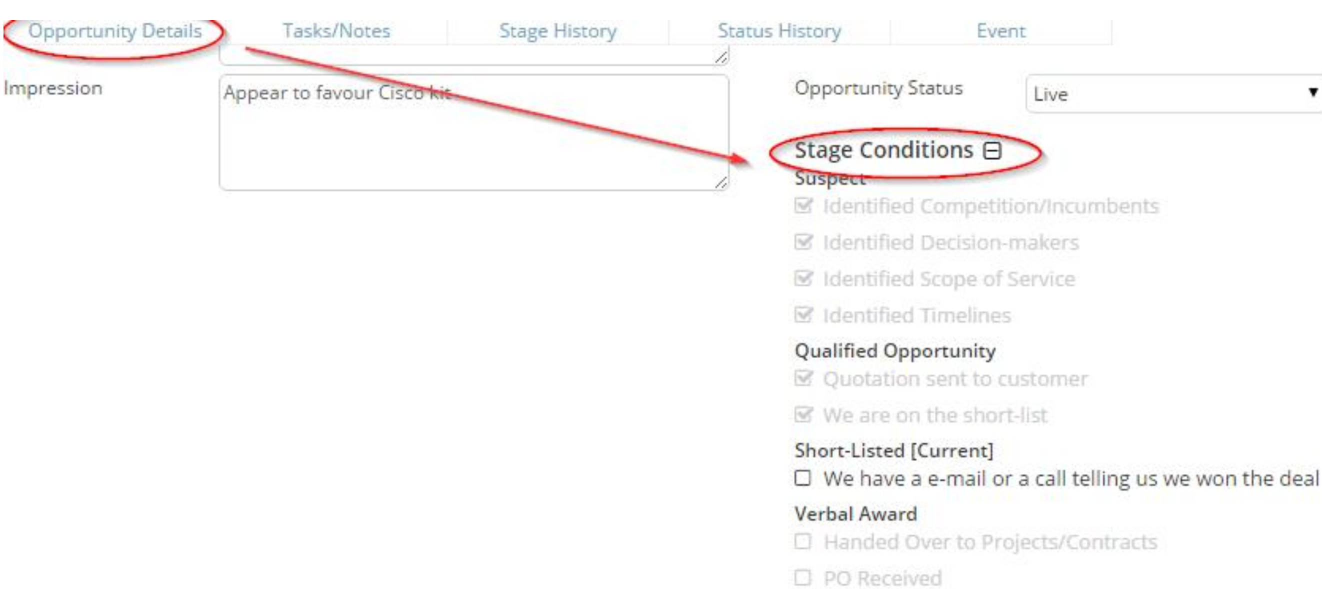


As the Sales Opportunity progresses, it must be moved from an Unqualified Lead, to Qualified Lead, all the way through to the Won Stage. In order to do this, certain conditions must be met.

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

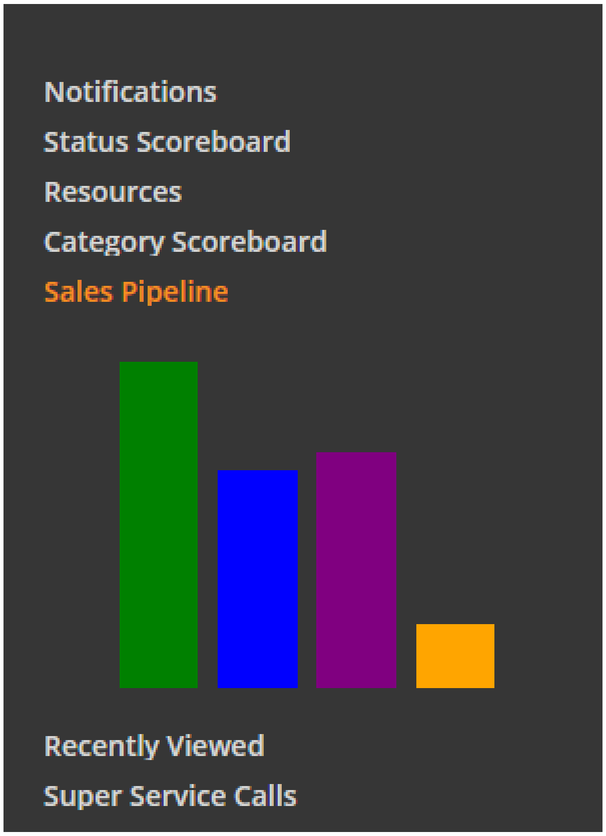


This can be done on the Opportunity Details tab / page

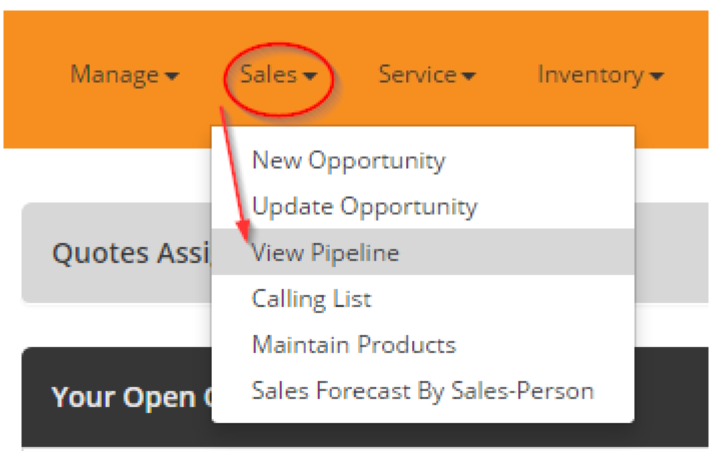


4. THE SALES PIPELINE

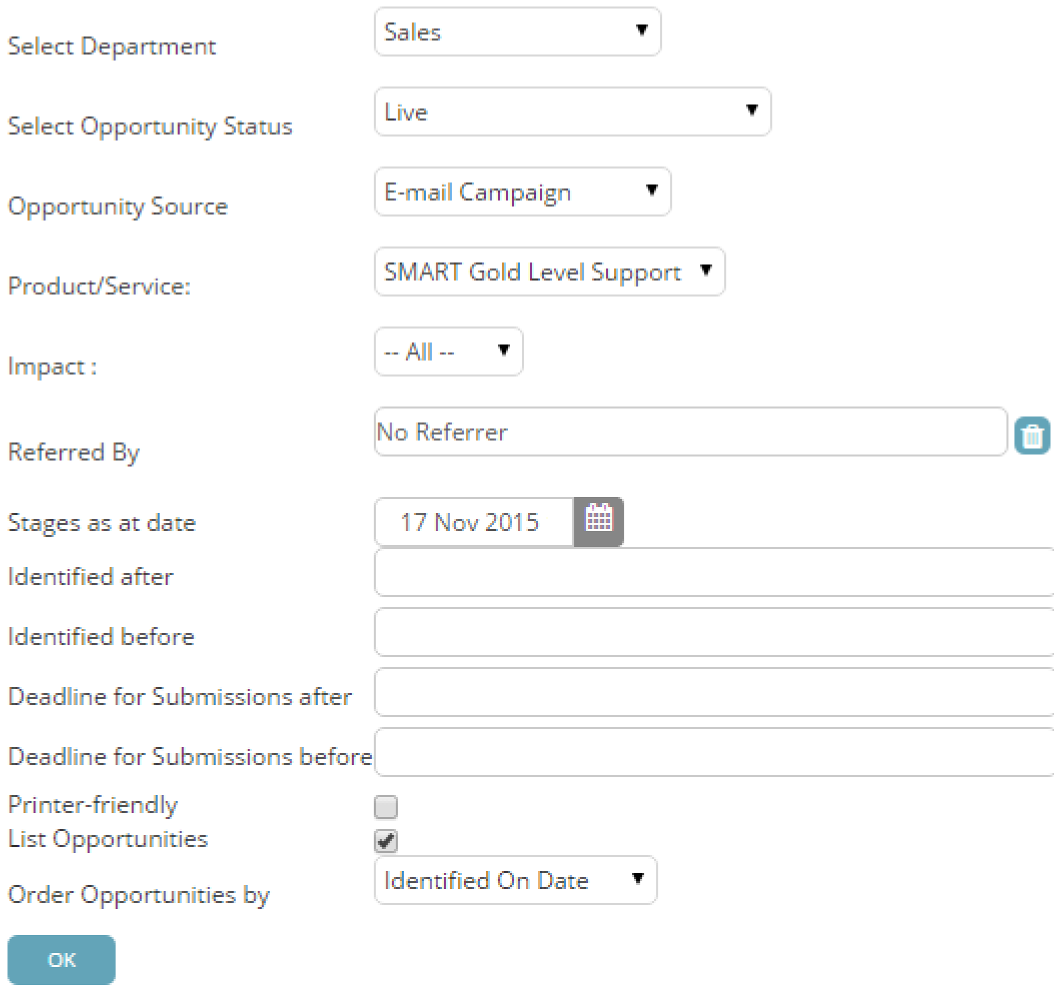
On the front page, there is a mini Sales Pipeline in the left hand tool bar. This is used for quick easy reference.



Step 1:
To access the detailed Sales Pipeline, click on the Sales menu:

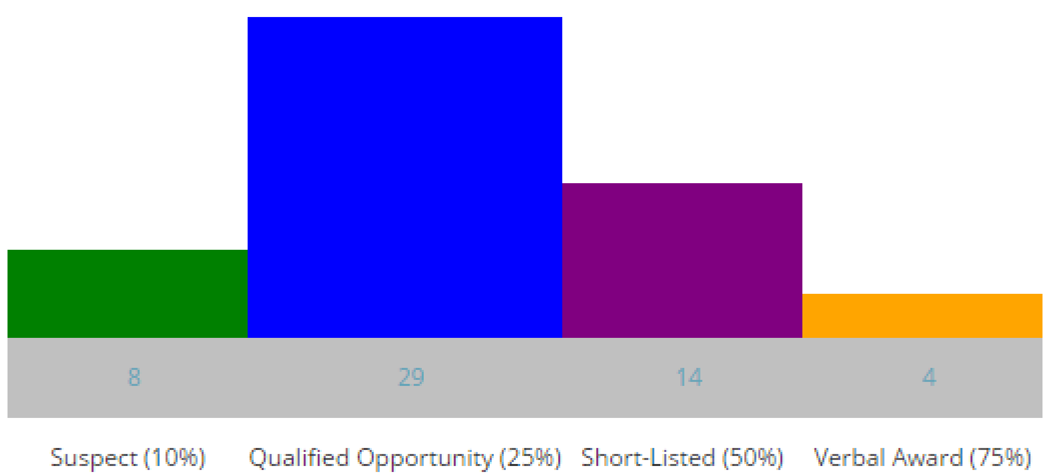


Step 2:
Filter as required and click OK



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.