CETEC ERP

CRM - Quoting, Leads, Opportunities

Enhancing your Sales Department!

A Sales Overview

Typical Usage of Sales Interface

- Create Customer
- Generate Quote
  - Quoting Tools
- Commit Quote to Order

A Sales Overview - Create a Customer

Customer Info

- Enter Contact Info
  - Customer Portal
- Shipping/Billing Info
- Commissions
- Generate a Quote

Customer Products & More (3)

VIEW
EDIT
CREATE QUOTE
QUOTES
ORDERS
INVOICES
CASES
CONSOLIDATED
LOST BUSINESS
VENDOR REPS
A/R STATEMENT
TAKE PAYMENT
CREDIT MEMOS (1) +
RMAS (5)
NOTIFICATIONS
PRODUCTION SETUP
CARRIER ACCOUNTS
VIEW EMAILS
CUSTOM DOCUMENTS
DOCUMENTS (0)
NOTES (0)
OPPORTUNITY 1
OPPORTUNITY 2

Back To List

Cust #	3	**Website**	products.com	**Credit Limit**	$10,000.00
Terms Code	1 - NET30	**Credit Code**	3 - Good	**Tax Reseller ID**	
Primary Phone	827-673-2265	**Primary Fax**	827-673-2264	**Primary Email**	info@products.com
Inter-Company	No	**Business Type**	Distribution (Add/Edit)		
Inside Sales	Tanner Rogers	**Outside Sales**	Scott Ryan		
Default Currency	USD	**Internal ID**			

CREDIT OVERVIEW

A/R Balance	$2,165.60	**DSO**	64	**Credit Code**	3 - Good	**Credit Limit**	$10,000.00
Avg Pay Days	6	**Last Payment**	2019-10-04	View Statement			

SALES OVERVIEW

Created On	2019-09-18	**First Quoted**	2019-09-18	**Latest Invoice**	2019-10-07		
MTD Sales	$2,542.40	**Prior MTD**	$0.00	**YTD Sales**	$18,457.90	**Prior YTD**	$0.00
Quote Value	$1,423.22	**GP**	$158.83	**GM**	11 %	**# Quotes**	6
Order Value	$121,386.00	**GP**	$63,720.13	**GM**	52 %	**# Orders**	20

Help

CONTACTS

Add Contact

Firstname	Lastname	Title	Phone	Mobile	Fax	Email	Address	Timezone	
Jeff	**Smith**	Purchasing Agent	512-299-9170			jeff.smith@products.com View Conversation		America/Chicago	

ADDRESSES

Add Address

Name	Street	City	State/Province	Zip/Postal	Country	Attn Line	Type	Tax Group	
Products & More	111 Congress Ave #400	Austin	TX	78701	United States		Bill To	City Sales Tax (6%)	Map Edit Delete
Products & More	111 Congress Ave #400	Austin	TX	78701	United States		Ship To		Map Edit Delete

COMMISSIONS / VENDOR REPS

Vendor	Vendor Contact	Breakdown	Comments	
Bob Sturm	Bob Sturm	10%	Reseller 10% subject to change	Delete
Rhyner Consulting	Michael Rhyner	15%	Reseller 15% subject to change	Delete
(vendor)				Update

Help

Customer Products & More (3)

VIEW
EDIT
CREATE QUOTE
QUOTES
ORDERS
INVOICES
CASES
CONSOLIDATED
LOST BUSINESS
VENDOR REPS
A/R STATEMENT
TAKE PAYMENT
CREDIT MEMOS (1) +
RMAS (5)
NOTIFICATIONS
PRODUCTION SETUP
CARRIER ACCOUNTS
VIEW EMAILS
CUSTOM DOCUMENTS
DOCUMENTS (0)
NOTES (0)
OPPORTUNITY 1
OPPORTUNITY 2

Back To List

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CREDIT OVERVIEW

A/R Balance	$2,165.60	**DSO**	64	**Credit Code**	3 - Good	**Credit Limit**	$10,000.00
Avg Pay Days	6	**Last Payment**	2019-10-04		View Statement		

SALES OVERVIEW

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Order Value	$121,386.00	**GP**	$63,720.13	**GM**	52 %	**# Orders**	20

Help

Quoting - Advanced Tools

Enter Quote Header/Line Info

- Quoting Tools
  - Sending Emails
  - Workflow
  - Documents
  - Notes

CETEC ERP

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ▾ ORDERS ▾ INVOICES ▾ CUSTOMERS ▾ LEADS ▾ OPPORTUNITIES ▾ FORECASTS ▾ EXPENSES ▾ REPORTS ▾

Quote/Order Worksheet 167

Sales Editing: Tanner Rogers

- VIEW & EDIT
- SEND +
- COMMIT TO ORDER
- QUOTING TOOLS +
- SHIP AND DEBITS
- COMMISSION
- DOCUMENTS (0)
- NOTES (0)
- PREPAY
- CREATE PQUOTE

Build Process 1 2 3 4 5

2. Commit Order

Help

Customer	Products & More (3) Products & More 111 Congress Ave #400 Austin, TX 78701 UNITED STATES			**Contact**	Jeff Smith
Cust PO #		**Owner**	tanner	**Status**	Open
Inside Sales	Tanner Rogers	**Outside Sales**	Scott Ryan		

Add Line | Change All Lines | Show Open Lines | Submit

+/- Columns

#	PRC	Part	Ship Date	Dock Date	Qty	Cost	Resale	Ext. Resale	Discount	Final Resale	
1	BOM	1000	2019-10-11	2019-10-11	1	$159.02	$400.00	$400.00	Add	$400.00	
			2019-10-11	2019-10-11	1	Cost	Resale				Add

Freight Resale Estimate:		**Freight Discount:**		**Final Freight Resale:**	
				Tax (0%):	$0.00
		Ext. Cost:	$159.02	**Ext. Resale:**	$400.00

Quoting - Advanced Tools

Sending Emails

- Send the PDF of your Quote to your contact
- CC/BCC members of your team or others
- Write body of text
  - Can be customized in config settings
    - ‘Quote Email Body’
- Auto-Attach PDF to the ‘Documents’

Quote/Order Worksheet 167

Sales Editing: Tanner Rogers

VIEW & EDIT
SEND +
- PDF/EMAIL (QUICK)
- EXCEL FILE
- PRICE BOOK

COMMIT TO ORDER
QUOTING TOOLS +
SHIP AND DEBITS
COMMISSION
DOCUMENTS (0)
NOTES (0)
PREPAY
CREATE PQUOTE

Help

Customize PDF					Bold Row
☑ Header Comment	☑ Quote Internal Name	☑ Bill To	☑ Ship To	☑ Show Tech Comments	☑ Sales Contacts
☑ Ship Type	☑ Totals	☑ Ship Via	☑ Shipping Instructions	☑ Show Quote Rev	☑ Show Carrier Account
☑ Internal ID					
☑ Prcpart	☑ PRC	☑ Weight	☑ Part #	☑ Customer Part	☑ Revision
☑ Ship Date	☑ Dock Date	☑ Lead Time	☑ Qty	☑ Resale	☑ Tax
☑ Ext. Price	☑ Discount	☑ Part Description	☑ Tech Description	☑ Line Comment	☑ Line Taxes
☑ Line Warnings	☑ Line Images	☑ ECCN	☑ COO	☑ Commissions Info	☑ Girth

Set Columns | Download PDF | Email PDF

PREVIEW

Quotation

CETEC ERP

Quote Number: 167 -
Revision: 1
Date: 2019-10-11
Buyer: Jeff Smith | jeff.smith@products.com | 512-299-9170

Quote 167

VIEW & EDIT
SEND +
COMMIT TO ORDER
QUOTING TOOLS +
SHIP AND DEBITS
COMMISSION
DOCUMENTS (0)
NOTES (0)
PREPAY
CREATE PQUOTE

Email PDF

From

"Tanner Rogers" <tanner@cetecerp.com>

To (*comma delimited*)

jeff.smith@products.com

(Contacts)

CC (*comma delimited*)

scott@cetecerp.com

(Contacts)

BCC (*comma delimited*)

sales@cetecerp.com

(Contacts)

Subject

Cetec ERP - Quote #167

Body

Please see the attachment. Let me know if you have any questions about the quote!

Have a great day,

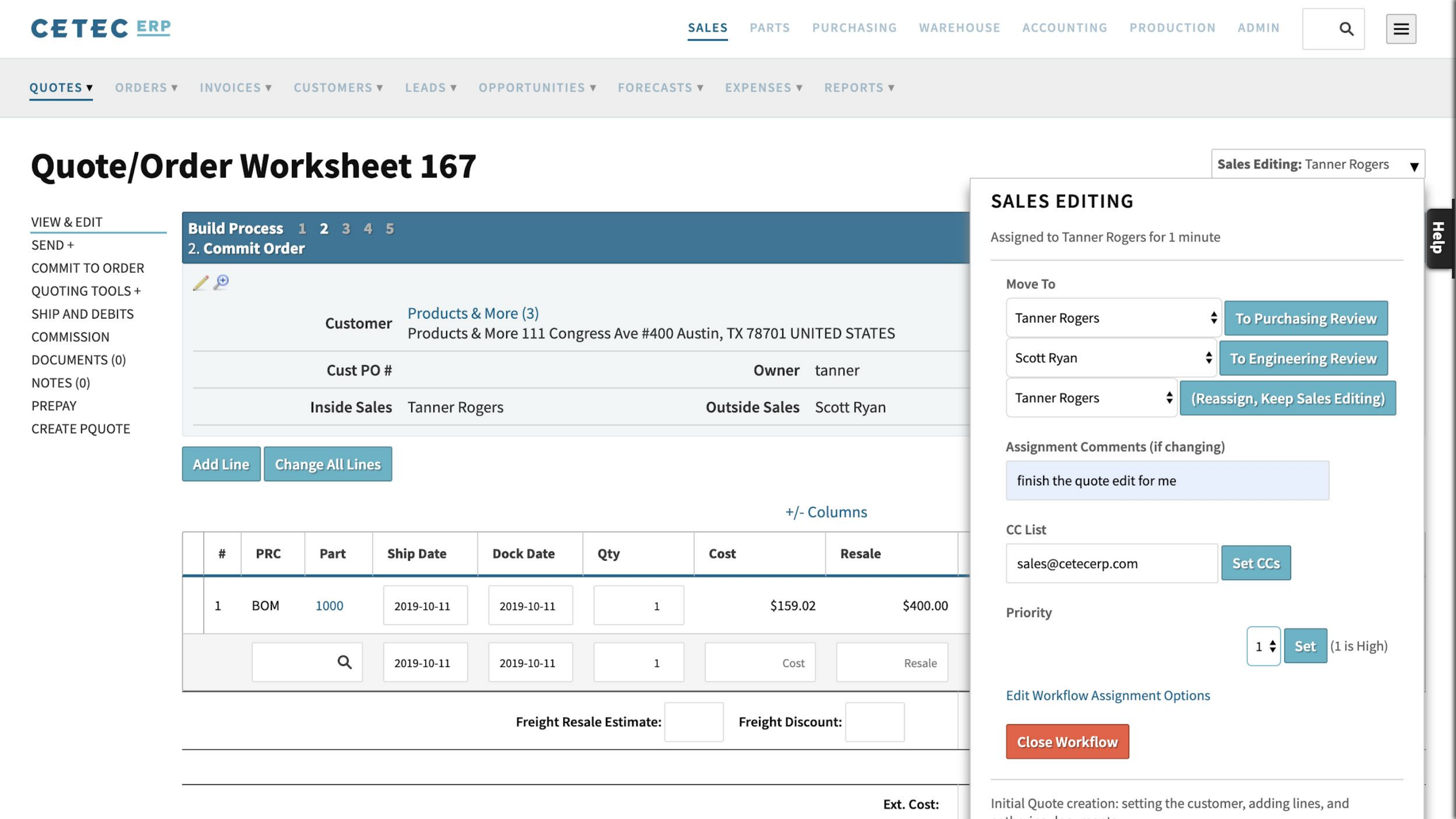
Send

Help

Quoting - Advanced Tools

Workflow

- Assign the Quote to Different Users
- Define the Workflow Stages
  - Admin>Data Maintenance>Workflow
  - Admin>Maintenance>Workflow Maintenance
- Emails sent to the receiver
  - CC others on workflow change


CETEC ERP
SALES
PARTS
PURCHASING
WAREHOUSE
ACCOUNTING
PRODUCTION
ADMIN
QUOTES ▾
ORDERS ▾
INVOICES ▾
CUSTOMERS ▾
LEADS ▾
OPPORTUNITIES ▾
FORECASTS ▾
EXPENSES ▾
REPORTS ▾
Quote/Order Worksheet 167
Sales Editing: Tanner Rogers
VIEW & EDIT
SEND +
COMMIT TO ORDER
QUOTING TOOLS +
SHIP AND DEBITS
COMMISSION
DOCUMENTS (0)
NOTES (0)
PREPAY
CREATE PQUOTE
Build Process 1 2 3 4 5
2. Commit Order
Customer
Products & More (3)
Products & More 111 Congress Ave #400 Austin, TX 78701 UNITED STATES
Cust PO #
Owner tanner
Inside Sales Tanner Rogers
Outside Sales Scott Ryan
Add Line
Change All Lines
+/- Columns
PRC Part Ship Date Dock Date Qty Cost Resale
1 BOM 1000 2019-10-11 2019-10-11 1 $159.02 $400.00
2019-10-11 2019-10-11 1 Cost Resale
Freight Resale Estimate:
Freight Discount:
Ext. Cost:
SALES EDITING
Assigned to Tanner Rogers for 1 minute
Move To
Tanner Rogers
To Purchasing Review
Scott Ryan
To Engineering Review
Tanner Rogers
(Reassign, Keep Sales Editing)
Assignment Comments (if changing)
finish the quote edit for me
CC List
sales@cetecerp.com
Set CCs
Priority
1
Set
(1 is High)
Edit Workflow Assignment Options
Close Workflow
Initial Quote creation: setting the customer, adding lines, and
Help

Quoting - Advanced Tools

Documents and Notes

- Attach Documents to the Quote
  - Transfers over to the Order
  - Auto Attach from PDF
- Add Notes for Internal Communication
  - Set Calendar Reminders
  - MAKE THEM STICKY!

QUOTES ▾ ORDERS ▾ INVOICES ▾ CUSTOMERS ▾ LEADS ▾ OPPORTUNITIES ▾ FORECASTS ▾ EXPENSES ▾ REPORTS ▾

Quote/Order Worksheet 167

Sales Editing: Tanner Rogers ▾

- VIEW & EDIT
- SEND +
- COMMIT TO ORDER
- QUOTING TOOLS +
- SHIP AND DEBITS
- COMMISSION
- DOCUMENTS (1)
- NOTES (1)
- PREPAY
- CREATE PQUOTE

Note

Add Note:

Resending Quote if I don't hear back by next week

Note Type:

Reminder

Edit Note Types

Sticky:

Note Date:

Fri Oct 11 2019 12:36

Reminder Date:

2019-10-17 00:00:00

Reminder Title:

Reach out to Jeff

Note: This will email an invitation (.ics) to tanner@cetecerp.com which can be imported into your calendar.

Cc

Cancel Reminder

OK Cancel

Help

Quote/Order Worksheet 167

Sales Editing: Tanner Rogers ▾

- VIEW & EDIT
- SEND +
- COMMIT TO ORDER
- QUOTING TOOLS +
- SHIP AND DEBITS
- COMMISSION
- DOCUMENTS (1)
- NOTES (2)
- PREPAY
- CREATE PQUOTE

Note

Help

Added By Tanner Rogers on 2019-10-11 12:36:53

Resending Quote if I don't hear back by next week

Type: Reminder

Sticky! Toggle Sticky

Added By Tanner Rogers on 2019-10-11 12:33:08

Sent Quote PDF to jeff.smith@products.com

CC: scott@cetecerp.com

Email Body:

Please see the attachment. Let me know if you have any questions about the quote!

Have a great day,

Type: Email

https://3-2.cetecerpdevel.com/quote/167/make_pquote_from_quote

CETEC ERP

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

QUOTES ▾ ORDERS ▾ INVOICES ▾ CUSTOMERS ▾ LEADS ▾ OPPORTUNITIES ▾ FORECASTS ▾ EXPENSES ▾ REPORTS ▾

Quote/Order Worksheet 167

Sales Editing: Tanner Rogers ▾

Help

- VIEW & EDIT
- SEND +
- COMMIT TO ORDER
- QUOTING TOOLS +
- SHIP AND DEBITS
- COMMISSION
- DOCUMENTS (1)
- NOTES (2)
- PREPAY
- CREATE PQUOTE

Hide Stickies

Sticky Note On 167

Resending Quote if I don't hear back by next week

Added By Tanner Rogers on 2019-10-11

Build Process 1 2 3 4 5

2. Commit Order

Customer	Products & More (3) Products & More 111 Congress Ave #400 Austin, TX 78701 UNITED STATES			**Contact**	Jeff Smith
Cust PO #		**Owner**	tanner	**Status**	Open
Inside Sales	Tanner Rogers	**Outside Sales**	Scott Ryan		

Add Line | Change All Lines | Show Open Lines | Submit

+/- Columns

A Sales Overview - Quote to Order

Finalize Quote Details/Commit To Order

- Sub Assemblies?
- Build now or later?
- MRP Build?
- Scheduling?

Quoting - Questions?

A CRM Overview

Leads

- Manage Workflow
- Conversion Stats

Opportunities

- View Potential Sales in Your Pipeline
- Manage Workflow

Leads - An Overview

In Cetec, leads allow your sales department to track potential sales for new customers and internally communicate next steps for each lead within your sales funnel.

Using leads look something like this:

Lead List

Customer Name	Search customers...	Date	(from) - (to)	Date Type	Newest Note
State		Assigned To	Mike Congdon	Open/Closed	Open
Lead Program	All Blowout Sale General Marketing Efforts New Customer Sale	Lead Source	All 3rd Party Software Cold Calling Referral	Lead State	All Qualification Quoting Business Acquired
Prob >=		Outside Sales	All	Inside Sales	All

Submit Create New

Help

Note: You can add or view Customer Notes by clicking on the 'Newest Note' column. Lead table export will include email addresses for all contacts at each company.

Displaying 1 - 3 of 3 Export +/- Columns

Lead ID	Program	Source	Lead State	Assigned To	Customer Name	Primary Contact Firstname	Contact Email	Newest Note	Lead Probability %	Net Potential Sale	Est Conversion
5	General Marketing Efforts	Cold Calling	First Contact	tanner	Falcon Electronics	Stephen	sbrady@falconelectronics.com	2019-10-09	20	$4,000.00	2019-12-01
2	General Marketing Efforts	3rd Party Software	Follow Up	mike	Fox Manufacturing	Bill	bill.taylor@foxmanufacturing.com	2019-10-08	60	$3,000.00	2019-12-31
4	New Customer Sale	3rd Party Software	Qualification	ethan	MiiR	Jeff	jeff@miir.com	2019-10-09	70	$8,500.00	2019-11-22

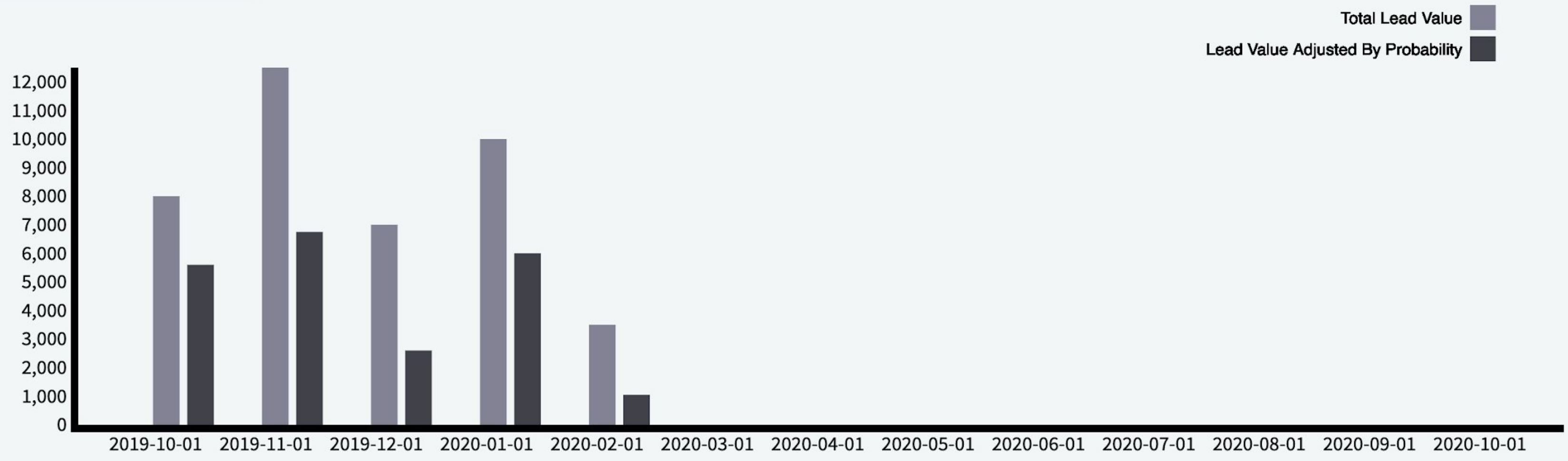
Lead Program: General Marketing Efforts

Name:	General Marketing Efforts	**Active:**	Yes	Edit Lead Programs	
# Open Leads:	6	**# Closed Leads:**	1	**# Total Leads:**	7

Help

TOTAL LEAD VALUE, LEAD VALUE ADJUSTED BY PROBABILITY

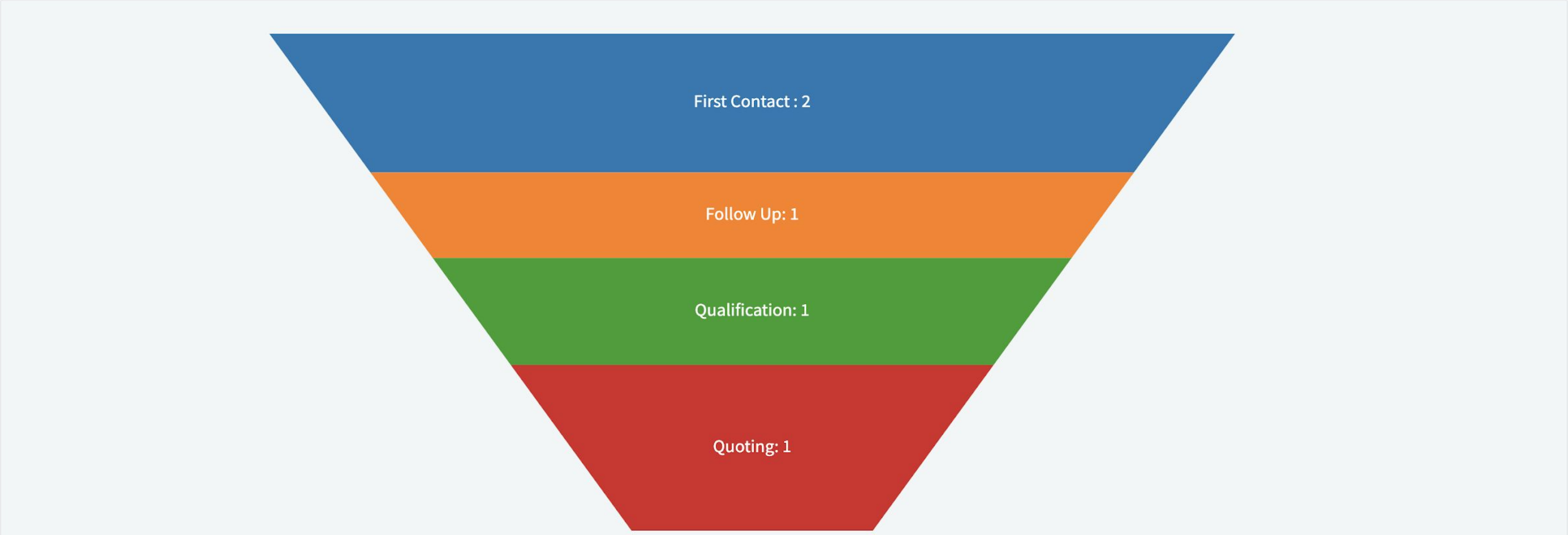
Show Next Graph: Number of Leads



LEADS BY STATUS

Status	# Leads
First Contact	2
Follow Up	1
Qualification	1
Quoting	1
Business Acquired	1
Close	0

LEAD FUNNEL FOR GENERAL MARKETING EFFORTS



Help

SALES PARTS PURCHASING WAREHOUSE ACCOUNTING PRODUCTION ADMIN

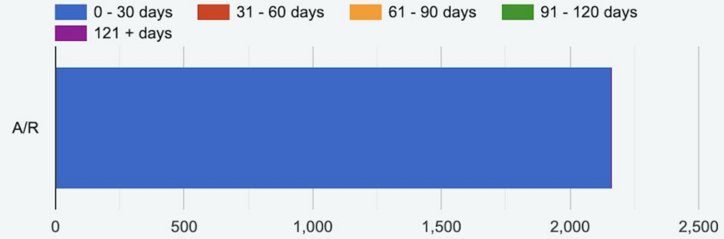
KPIs

SALES FUNNEL

General Marketing Efforts

Lead List Sales Analysis

OPEN A/R $2,165.60 (CASH: $17,980.25)



INVOICE VALUES

	Ext Resale	Cost	GP Value	GM %
Yesterday	$0.00	$0.00	$0.00	0 %
Today	$0.00	$0.00	$0.00	0 %
MTD	$2,030.00	$4.00	$2,026.00	99 %
Prior MTD	$0.00	$0.00	$0.00	0 %
Prior Year MTD	$0.00	$0.00	$0.00	0 %
Prior Month	$15,918.00	$86,744.20	$-70,826.20	-444 %
YTD	$17,948.00	$86,748.20	$-68,800.20	-383 %

OPEN A/P - $174,200.00

Help

Leads - Setup

Data Maintenance Tables

- LeadSource
- LeadType
- WorkflowStage
- Workflow Maintenance

Leads - Setup

Admin>Maintenance>Data Maintenance

LeadSource

Represents *how* you acquired the lead.

Data Maintenance For LeadSource

Back To All

Warning: Removing/Changing data may have repercussions on other related data sets.
If you want to modify a row that has been added already, we strongly recommend that you rename the row rather than delete the row - deleting the row could orphan off any related data.

Displaying 1 - 5 of 5 Export +/- Columns

Id	Name	Lead Cost	Active	Delete
5	3rd Party Software	100.00000000	Active	
4	Cold Calling		Active	
3	Web-site		Active	
2	Trade Show		Active	
1	Referral		Active	

Displaying 1 - 5 of 5 Export +/- Columns

Submit Add Record

Help

Leads - Setup

Admin>Maintenance>Data Maintenance

LeadType

Represents what category this lead falls under.

Help

Data Maintenance For LeadType

Back To All

Warning: Removing/Changing data may have repercussions on other related data sets.

If you want to modify a row that has been added already, we strongly recommend that you rename the row rather than delete the row - deleting the row could orphan off any related data.

Displaying 1 - 4 of 4 Export +/- Columns

Id	Name ⓘ	Active	Delete
4	General Marketing Efforts	Active	☐
3	New Customer Sale	Active	☐
2	Blowout Sale	Active	☐
1	New Product Line Sale	Active	☐

Displaying 1 - 4 of 4 Export +/- Columns

Submit Add Record

Leads - Setup

Admin>Maintenance>Data Maintenance

WorkflowStage

Represents the stage of the lead within your Sales Funnel

- Note the ‘Method to Run’ column
    - convert_to_customer

Data Maintenance For WorkflowStage

Back To All
Warning: Removing/Changing data may have repercussions on other related data sets.
If you want to modify a row that has been added already, we strongly recommend that you rename the row rather than delete the row - deleting the row could orphan off any related data.

Displaying 1 - 16 of 16 Export +/- Columns

Id	Name	Description	Object Type	Order Num	Initial State	Close State	Method To Run
16	Close	Closed	Lead	6	☐	☑	
15	Business Acquired	Got the Sale!	Lead	5	☐	☑	convert_to_customer
14	Quoting	Quote In Process	Lead	4	☐	☐	
13	Qualification	Qualifying the Customer	Lead	3	☐	☐	
12	Follow Up	Follow Up Call/ Email	Lead	2	☐	☐	
11	First Contact	Initial Contact of Lead	Lead	1	☑	☐	
10	Closed	Close CAR	CAR	4	☐	☐	
9	Validation	Validate CAR Data	CAR	3	☐	☐	

Help

Leads - Setup

Admin>Maintenance>Workflow Maintenance

Lead

Represents each user’s role within each Workflow Stage

Workflow List

Workflow		
Lead	Edit	Avg Queue Time
Opportunity	Edit	Avg Queue Time
Ordline	Edit	Avg Queue Time
Project	Edit	Avg Queue Time
Quote	Edit	Avg Queue Time
ECO	Edit	Avg Queue Time
PQuote	Edit	Avg Queue Time
CAR	Edit	Avg Queue Time
Document	Edit	Avg Queue Time
NCR	Edit	Avg Queue Time
Voucher	Edit	Avg Queue Time

Help

Edit Workflow States And Possible Assignments Lead

Back To All

Help

STATE: BUSINESS ACQUIRED

Users	Roles	
accounting Brent Barton Chris Stearns Dylan Reuter Ethan Wiggins Jordan Jolly Justin Tefteller	Accounting Accounting Admin Admin AllInvoices AllPQuotes AllQuotes Can Edit BOM	Include User Who Initiated / Created Lead Workflow? Enable Priority/Nag Alerts? Submit

STATE: CLOSE

Users	Roles	
accounting Brent Barton Chris Stearns Dylan Reuter Ethan Wiggins Jordan Jolly Justin Tefteller	Accounting Accounting Admin Admin AllInvoices AllPQuotes AllQuotes Can Edit BOM	Include User Who Initiated / Created Lead Workflow? Enable Priority/Nag Alerts? Submit

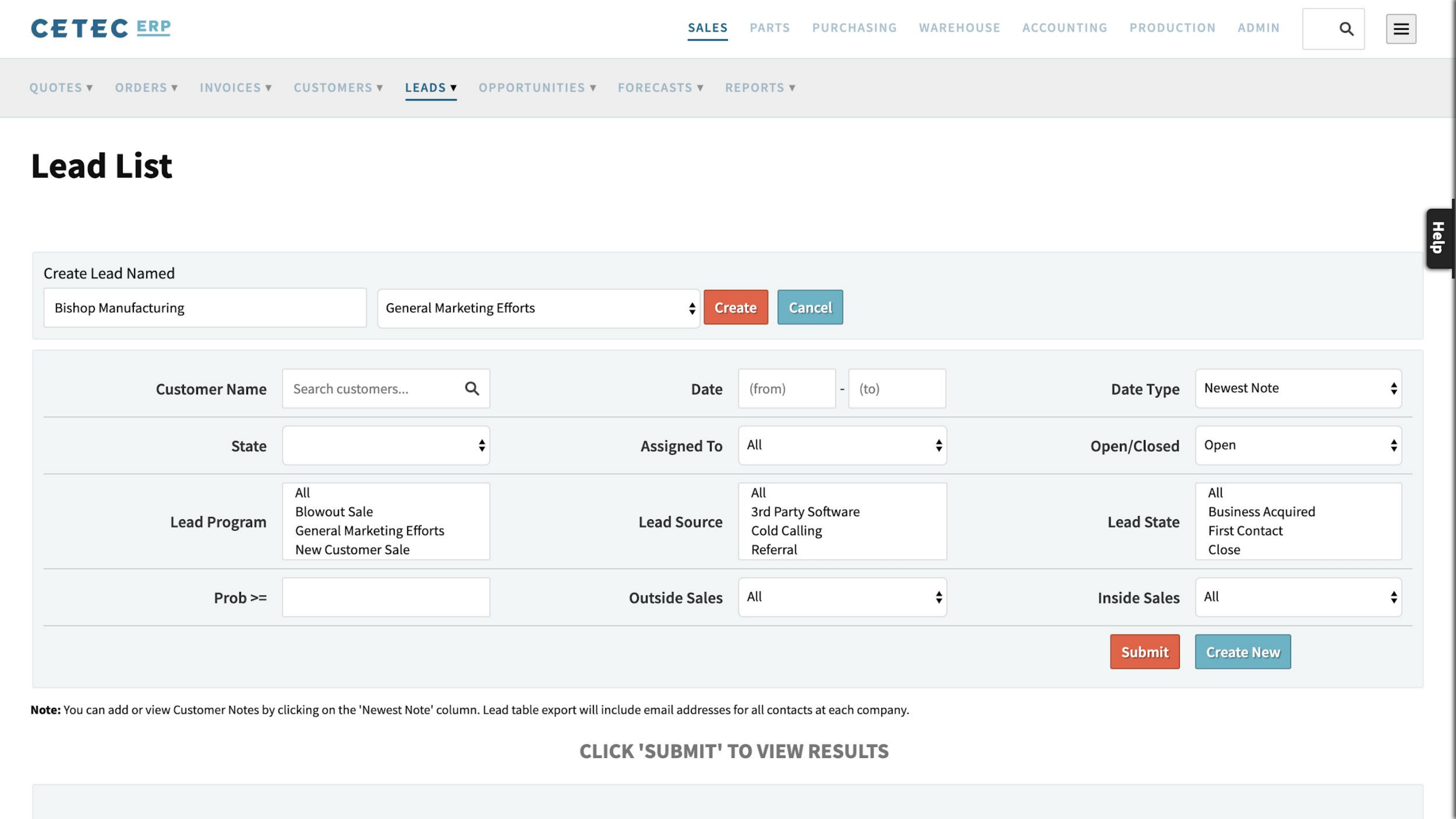
STATE: FIRST CONTACT

Leads - Creation

Finally! Let’s, create a lead

Sales>Leads>Lead List>*Create*

Similar to a customer, give them a name, and assign them a ‘Program’


CETEC ERP
SALES
PARTS
PURCHASING
WAREHOUSE
ACCOUNTING
PRODUCTION
ADMIN
QUOTES ▾
ORDERS ▾
INVOICES ▾
CUSTOMERS ▾
LEADS ▾
OPPORTUNITIES ▾
FORECASTS ▾
REPORTS ▾
Lead List
Create Lead Named
Bishop Manufacturing
General Marketing Efforts
Create
Cancel
Customer Name
Search customers...
Date
(from)
-
(to)
Date Type
Newest Note
State
Assigned To
All
Open/Closed
Open
Lead Program
All
Blowout Sale
General Marketing Efforts
New Customer Sale
Lead Source
All
3rd Party Software
Cold Calling
Referral
Lead State
All
Business Acquired
First Contact
Close
Prob >=
Outside Sales
All
Inside Sales
All
Submit
Create New
Note: You can add or view Customer Notes by clicking on the 'Newest Note' column. Lead table export will include email addresses for all contacts at each company.
CLICK 'SUBMIT' TO VIEW RESULTS
Help

Leads - Creation

Give the lead some info

- Lead Source
- Potential Sale ($$$)
- Estimated Conversion Date
- Notes

Lead 6 For Customer Link Engineering

- VIEW
- EDIT
- CREATE QUOTE
- QUOTES
- ORDERS
- INVOICES
- CASES
- CONSOLIDATED
- LOST BUSINESS
- VENDOR REPS
- A/R STATEMENT
- TAKE PAYMENT
- CREDIT MEMOS (0) +
- RMAS (0)
- NOTIFICATIONS
- PRODUCTION SETUP
- CARRIER ACCOUNTS
- CUSTOM DOCUMENTS
- DOCUMENTS (0)
- NOTES (1)
- LEAD 6

Lead Program	New Product Line Sale ◆ New Product Line Sale	**Lead Source**	Trade Show ◆ (source)
Lead State	First Contact	**Cust #**	11
Newest Note	2019-10-09	**Assigned To**	tanner
Net Potential Sale	$8,000.00	**Est Conv Date**	2019-10-17T(
Probability	70%		
Inside Sales	Tanner Rogers	**Outside Sales**	Tanner Rogers
Internal ID	N/A		
Created On	2019-10-09		Activate Update

Help

CUSTOMER NOTES

Note

Added By Tanner Rogers on 2019-10-09 13:46:52

Sent a quote, hoping for a call back next week

Toggle Sticky

Note: Sticky notes will appear above newer notes. Additionally, Customer notes set as sticky will show on Quotes/Orders/Invoices.

Leads - Into the Sales Funnel!

Track ownership of the lead

- Workflow Assignment
- Hierarchy of Lead Stage

CHANGE LEAD STATE

Target State	Assignment	
To First Contact	and assign to Brent Barton	Set
To Follow Up	and assign to Brent Barton	Set
To Qualification	and assign to Brent Barton	Set
To Quoting	and assign to Brent Barton	Set
To Business Acquired	and assign to Brent Barton	Set
To Close	and assign to Brent Barton	Set

Activate As Customer

Help

LEAD STATE HISTORY

Displaying 1 - 3 of 3 +/- Columns

Stage	Assigned To	Changed By	Began At	Ended At	Time in Stage
First Contact	Tanner Rogers	Tanner Rogers	10/09/19 1:46 PM	10/09/19 2:31 PM	44 minutes
Quoting	Ryan Williams	Tanner Rogers	10/09/19 2:31 PM	10/09/19 6:26 PM	3 hours, 54 minutes
Follow Up	Dylan Reuter	Tanner Rogers	10/09/19 6:26 PM	N/A	< 1 minute

Displaying 1 - 3 of 3 +/- Columns

Leads - Into the Sales Funnel!

See the data come to life

- Reports
- Lead Value Bar Graphs
- Visual Sales Funnel
- Home Page KPI

Lead List

Customer Name	Search customers...	Date	(from) - (to)	Date Type	Newest Note
State		Assigned To	Mike Congdon	Open/Closed	Open
Lead Program	All Blowout Sale General Marketing Efforts New Customer Sale	Lead Source	All 3rd Party Software Cold Calling Referral	Lead State	All Qualification Quoting Business Acquired
Prob >=		Outside Sales	All	Inside Sales	All

Submit Create New

Help

Note: You can add or view Customer Notes by clicking on the 'Newest Note' column. Lead table export will include email addresses for all contacts at each company.

Displaying 1 - 3 of 3 Export +/- Columns

Lead ID	Program	Source	Lead State	Assigned To	Customer Name	Primary Contact Firstname	Contact Email	Newest Note	Lead Probability %	Net Potential Sale	Est Conversion
5	General Marketing Efforts	Cold Calling	First Contact	tanner	Falcon Electronics	Stephen	sbrady@falconelectronics.com	2019-10-09	20	$4,000.00	2019-12-01
2	General Marketing Efforts	3rd Party Software	Follow Up	mike	Fox Manufacturing	Bill	bill.taylor@foxmanufacturing.com	2019-10-08	60	$3,000.00	2019-12-31
4	New Customer Sale	3rd Party Software	Qualification	ethan	MiiR	Jeff	jeff@miir.com	2019-10-09	70	$8,500.00	2019-11-22

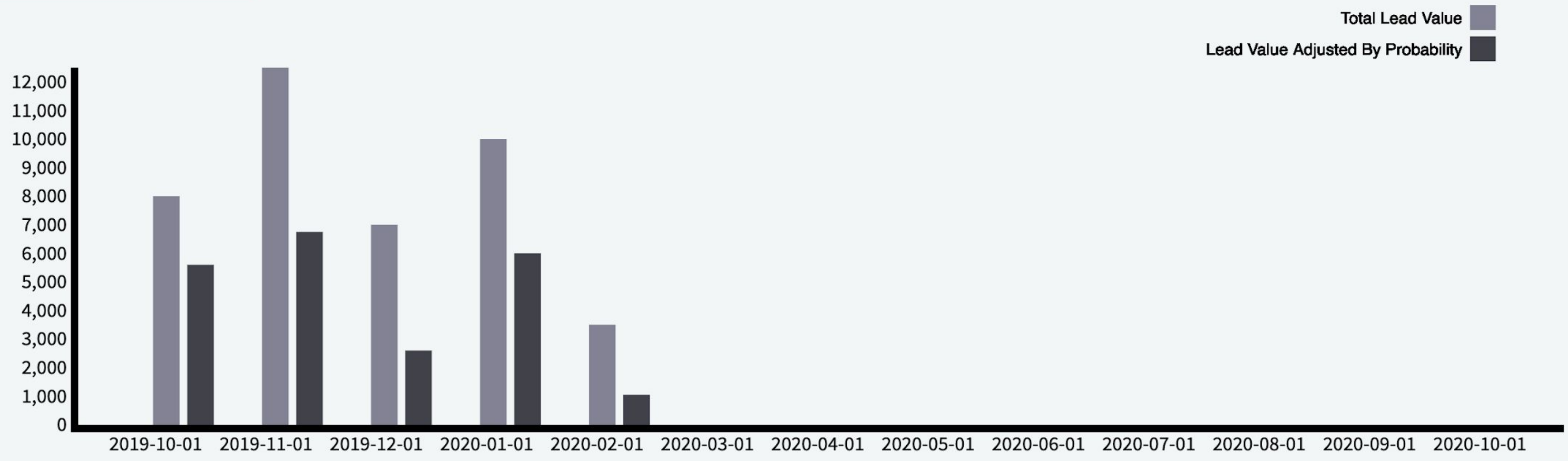
Lead Program: General Marketing Efforts

Name:	General Marketing Efforts	**Active:**	Yes	Edit Lead Programs
# Open Leads:	6	**# Closed Leads:**	1	**# Total Leads:** 7

Help

TOTAL LEAD VALUE, LEAD VALUE ADJUSTED BY PROBABILITY

Show Next Graph: Number of Leads

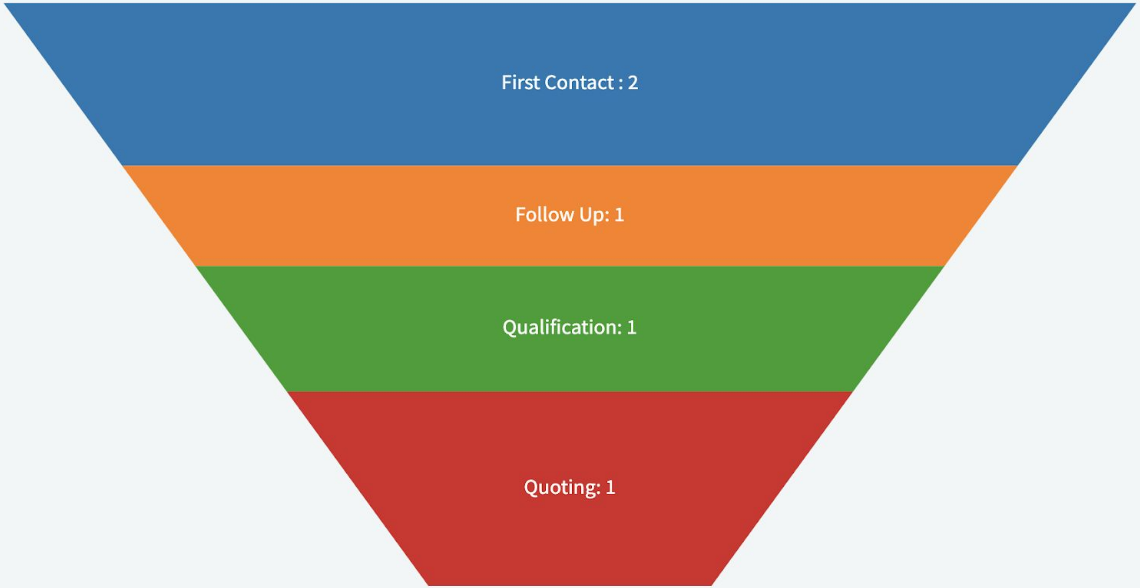


LEADS BY STATUS

Status	# Leads
First Contact	2
Follow Up	1
Qualification	1
Quoting	1
Business Acquired	1
Close	0

Help

LEAD FUNNEL FOR GENERAL MARKETING EFFORTS



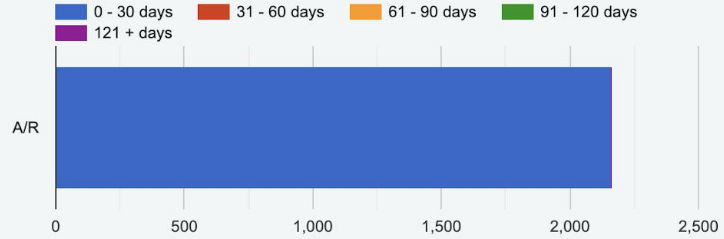
KPIs

SALES FUNNEL

General Marketing Efforts

Lead List Sales Analysis

OPEN A/R $2,165.60 (CASH: $17,980.25)



Help

INVOICE VALUES

	Ext Resale	Cost	GP Value	GM %
Yesterday	$0.00	$0.00	$0.00	0 %
Today	$0.00	$0.00	$0.00	0 %
MTD	$2,030.00	$4.00	$2,026.00	99 %
Prior MTD	$0.00	$0.00	$0.00	0 %
Prior Year MTD	$0.00	$0.00	$0.00	0 %
Prior Month	$15,918.00	$86,744.20	$-70,826.20	-444 %
YTD	$17,948.00	$86,748.20	$-68,800.20	-383 %

OPEN A/P - $174,200.00

Leads - Conversion!

Recall our ‘Method to Run’ setup

- Establish lead in the ‘Acquired’ Stage
- Activate the Lead into a Customer
- Carry on with Customer data
- Generate a Quote!

CHANGE LEAD STATE

Target State	Assignment		
To First Contact	and assign to	Brent Barton	Set
To Follow Up	and assign to	Brent Barton	Set
To Qualification	and assign to	Brent Barton	Set
To Quoting	and assign to	Brent Barton	Set
To Business Acquired	and assign to	Brent Barton	Set
To Close	and assign to	Brent Barton	Set

Activate As Customer

Help

LEAD STATE HISTORY

Displaying 1 - 3 of 3 +/- Columns

Stage	Assigned To	Changed By	Began At	Ended At	Time in Stage
First Contact	Tanner Rogers	Tanner Rogers	10/09/19 1:46 PM	10/09/19 2:31 PM	44 minutes
Quoting	Ryan Williams	Tanner Rogers	10/09/19 2:31 PM	10/09/19 6:26 PM	3 hours, 54 minutes
Follow Up	Dylan Reuter	Tanner Rogers	10/09/19 6:26 PM	N/A	< 1 minute

Displaying 1 - 3 of 3 +/- Columns

Leads - Conversion Stats

Review Valuable Lead Conversion Data

- Lead/Customer Percentage
  - Conversion Rate
- View per Month
- VIew Cost per Lead

Sales Analysis By Month

Months: 1 Submit

Help

Date	2019-10-01	Avg
# Leads	8	8.0
# Custs	3	3.0
% Conv	37.5 %	37.5 %
Total Spend		$0.00
Cost Per Lead	$0.00	$0.00
Cost Per Customer	$0.00	$0.00

Expense Categories Can Be Included by setting the Config value Sales Analysis Expense Categories.

Leads - Questions?

Opportunities - An Overview

Opportunities in Cetec are a way to gage potential sales of existing customers.

It’s separate from a Quote, but they can work in tandem.

Let’s take a quick peak.

Opportunities - Setup

Data Maintenance Tables

- Opportunity Type
- Workflow Stage
- Workflow Maintenance

Opportunities - Opportunity Type

Admin>Maintenance>Data Maintenance

Opportunity Type

Represents the Category of the Opportunity

- Likely a specific upcoming sale

Data Maintenance For OpportunityType

Back To All

Warning: Removing/Changing data may have repercussions on other related data sets.
If you want to modify a row that has been added already, we strongly recommend that you rename the row rather than delete the row - deleting the row could orphan off any related data.

Displaying 1 - 2 of 2 Export +/- Columns

Id	Name	Workflow Type	Active	Delete
2	BOGO	Buy one Get one	Active	
1	Fall Sale	Fall Sale!	Active	

Displaying 1 - 2 of 2 Export +/- Columns

Submit Add Record

Help

Opportunities - Workflow Stage

Admin>Maintenance>Data Maintenance

WorkflowStage

Represents the stage of the opportunity within your Sales Funnel

Data Maintenance For WorkflowStage

Back To All
Warning: Removing/Changing data may have repercussions on other related data sets.
If you want to modify a row that has been added already, we strongly recommend that you rename the row rather than delete the row - deleting the row could orphan off any related data.

Displaying 1 - 19 of 19 Export +/- Columns

Id	Name	Description	Object Type	Order Num	Initial State	Close State	Method To Run
19	Create Quote	Quoting	Opportunity	3	☐	☑	
18	Working	Build the Opportunity Details	Opportunity	2	☐	☐	
17	Qualifying	Qualifying	Opportunity	1	☑	☐	
16	Close	Closed	Lead	6	☐	☑	
15	Business Acquired	Got the Sale!	Lead	5	☐	☑	convert_to_customer
14	Quoting	Quote In Process	Lead	4	☐	☐	
13	Qualification	Qualifying the Customer	Lead	3	☐	☐	
12	Follow Up	Follow Up Call/ Email	Lead	2	☐	☐	

Help

Opportunities - Workflow Maintenance

Admin>Maintenance>Workflow Maintenance

Opportunity

Represents each user’s role within each Workflow Stage

Help

Workflow List

Workflow		
Lead	Edit	Avg Queue Time
Opportunity	Edit	Avg Queue Time
Ordline	Edit	Avg Queue Time
Project	Edit	Avg Queue Time
Quote	Edit	Avg Queue Time
ECO	Edit	Avg Queue Time
PQuote	Edit	Avg Queue Time
CAR	Edit	Avg Queue Time
Document	Edit	Avg Queue Time
NCR	Edit	Avg Queue Time
Voucher	Edit	Avg Queue Time

Edit Workflow States And Possible Assignments Opportunity

Back To All

STATE: CREATE QUOTE

Users	Roles	
accounting Brent Barton Chris Stearns Dylan Reuter Ethan Wiggins Jordan Jolly Justin Tefteller	Accounting Accounting Admin Admin AllInvoices AllPQuotes AllQuotes Can Edit BOM	☐ Include User Who Initiated / Created Opportunity Workflow? ☐ Enable Priority/Nag Alerts? Submit

STATE: QUALIFYING

Users	Roles	
accounting Brent Barton Chris Stearns Dylan Reuter Ethan Wiggins Jordan Jolly Justin Tefteller	Accounting Accounting Admin Admin AllInvoices AllPQuotes AllQuotes Can Edit BOM	☐ Include User Who Initiated / Created Opportunity Workflow? ☐ Enable Priority/Nag Alerts? Submit

STATE: WORKING

Help

Opportunities - Creation

Let’s Create an Opportunity!

Navigate to a Customer Record and scroll to the very bottom.

Select your Opportunity Type and click *Create*

Add Address

Name	Street	City	State/Province	Zip/Postal	Country	Attn Line	Type	Tax Group	
MiiR	111 Congress Ave #400	Austin	TX	78701	United States		Bill To		Map Edit Delete
MiiR	111 Congress Ave #400	Austin	TX	78701	United States		Ship To		Map Edit Delete

COMMISSIONS / VENDOR REPS

Vendor	Vendor Contact	Breakdown	Comments	
(vendor)				Update

LEADS

(choose program for new lead) Create Add or Edit Lead Program Types

Lead ID	Program	Lead State
7	General Marketing Efforts	Business Acquired

OPPORTUNITIES

(choose program for new opportunity)
BOGO
✓ Fall Sale

Create Add or Edit Opportunity Program Types

Help

Opportunities - Creation

Let’s fill in some data

- Probability
- Net Potential Sale
- Part Numbers
  - Qty
  - Resale
  - Date

Opportunity 3 For Customer MiiR

Back To All Opportunities

Opportunity Type	Fall Sale			**Opportunity State**	Working
Cust #	12	**Newest Note**		**Assigned To**	justin
Probability	70%	**Net Potential Sale**	$50,000.00	**Net, W/ Prob Adjustment**	$35,000.00
Inside Sales	Tanner Rogers	**Outside Sales**	Tanner Rogers	**Internal ID**	Service Centers
Name	5 Month Contract	**Tags**	set		Update

Help

PIPELINE

Target Date	Prcpart	Qty	Resale	Ext Resale	Drop?
2019-11-11	BOM1000	10	$1,000.00	$10,000.00	☐
2019-12-11	BOM1000	10	$1,000.00	$10,000.00	☐
2020-01-11	BOM1000	10	$1,000.00	$10,000.00	☐
2020-02-11	BOM1000	10	$1,000.00	$10,000.00	☐
2020-03-11	BOM1000	10	$1,000.00	$10,000.00	☐

Add # New Pipeline Entries 5 **For Part** BOM1000 Update

Opportunities - Creation

Manage the workflow on the opportunity

- Assign the Opportunity
- Enter Notes
- View Workflow History

CUSTOMER NOTES

Note

Added By Justin Tefteller on 2019-10-11 11:04:43

Building Quote should be done early next week.

Type: Reminder

Toggle Sticky

Added By Tanner Rogers on 2019-10-11 11:02:07

Emailing Jeff at MiiR. Informing him about the Fall Sale

Toggle Sticky

Note: Sticky notes will appear above newer notes. Additionally, Customer notes set as sticky will show on Quotes/Orders/Invoices.

CHANGE OPPORTUNITY STATE

To Qualifying and assign to brent

To Working and assign to brent

To Create Quote and assign to brent

OPPORTUNITY STATE HISTORY

Displaying 1 - 3 of 3 +/- Columns

Stage	Assigned To	Changed By	Began At	Ended At	Time in Stage
Qualifying	Tanner Rogers	Tanner Rogers	10/11/19 10:58 AM	10/11/19 11:02 AM	3 minutes
Working	Ryan Williams	Tanner Rogers	10/11/19 11:02 AM	10/11/19 11:02 AM	< 1 minute

Help

Opportunities - See the Data!

Display sales opportunity data

- Potential Sales by Opportunity Program
- Dollars/Probability
- Potential Sales in a Pipeline

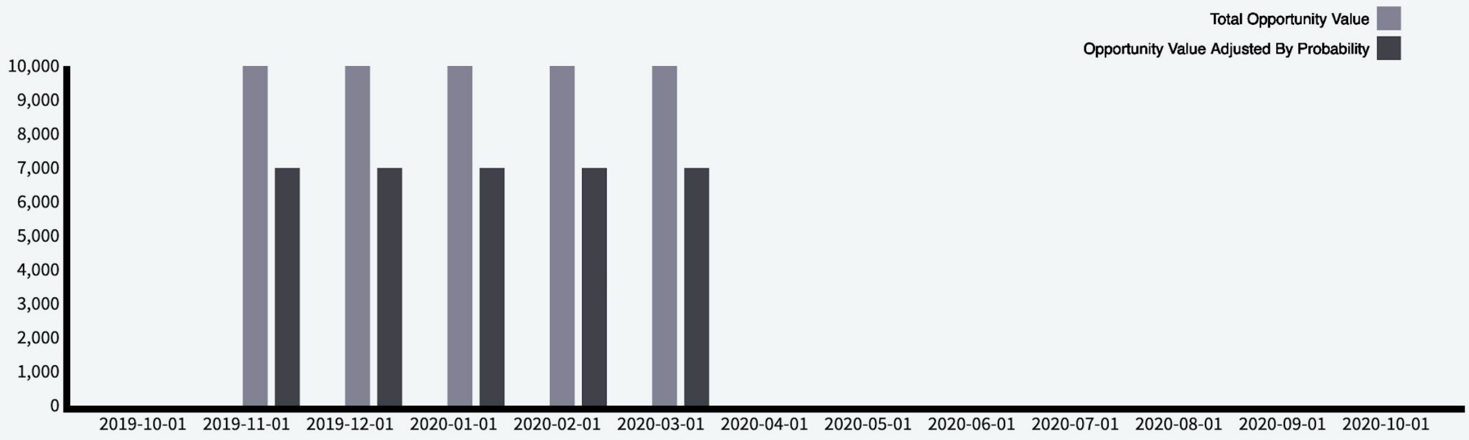
QUOTES ▾ ORDERS ▾ INVOICES ▾ CUSTOMERS ▾ LEADS ▾ OPPORTUNITIES ▾ FORECASTS ▾ EXPENSES ▾ REPORTS ▾

Opportunity Program: Fall Sale

Name	Fall Sale	**Active**	Yes	Edit Opportunity Programs	
Open Opportunities	1	**Closed Opportunities**	1	**Total Opportunities**	2

TOTAL OPPORTUNITY VALUE, OPPORTUNITY VALUE ADJUSTED BY PROBABILITY

Show Next Graph: Number of Opportunities



Help

Opportunity Pipeline

Conv. Date (from) - (to) Prcpart Search parts... Status Open

Customer Search customers... Submit

Help

Displaying 1 - 5 of 5 Export +/- Columns

ID	Program	Status	Opportunity State	Assigned To	Customer Name	Customer No.	Prcpart	Probability %	Net Potential Sale	Net Sale, W/ Prob Adj	Est Conversion
3	Fall Sale	Open	Working	justin	MiiR	12	BOM1000	70	$1,000.00	$7,000.00	2019-11-11
3	Fall Sale	Open	Working	justin	MiiR	12	BOM1000	70	$1,000.00	$7,000.00	2019-12-11
3	Fall Sale	Open	Working	justin	MiiR	12	BOM1000	70	$1,000.00	$7,000.00	2020-01-11
3	Fall Sale	Open	Working	justin	MiiR	12	BOM1000	70	$1,000.00	$7,000.00	2020-02-11
3	Fall Sale	Open	Working	justin	MiiR	12	BOM1000	70	$1,000.00	$7,000.00	2020-03-11
									$5,000.00	$35,000.00	

Displaying 1 - 5 of 5 Export +/- Columns

Opportunities - Questions?

CRM - Questions?