

Sales Handbook



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1 Sales Process

This booklet gives you advice about Salesforce and the Backend. We start in section 2 by explaining what a “lead” is, how you can create a “new” one and how to work with it.

Section 3 addresses the steps needed to be taken to get a restaurant online. The section is divided into two important parts, making a “Welcome Call” and “Collecting the Flyer” from the restaurants.

In the last step the lead needs to be converted and all information has to be entered into the Backend system.

In section 4 “accounts” and “single spreadsheets” are introduced. section 5 deals with “opportunities” and starts with explaining the details and how to open up a new one. The aim is to record what opportunity each sales employee has with a restaurant and what kind of products he/she would be able to sell. Therefore he/she can add products to the opportunity. Furthermore it is possible to see how mature an opportunity is.

While reading this booklet we advise you to use Salesforce simultaneously and try to reconstruct the steps described.



2 Lead

In this Section

- Create a lead
- Lead edit

A lead in our case represents information about a delivery service aka “restaurant”. The editorial teams search the web and other platforms for potential restaurants and create leads so that you can work with them to sign up restaurants for our website. Before a lead reaches value, it will be checked if the service delivers food or is already listed on the webpage of Lieferheld.

Usually you do not need to create a lead, but to get familiar with the format it is important to understand how to do so.

2.1 Create a Lead

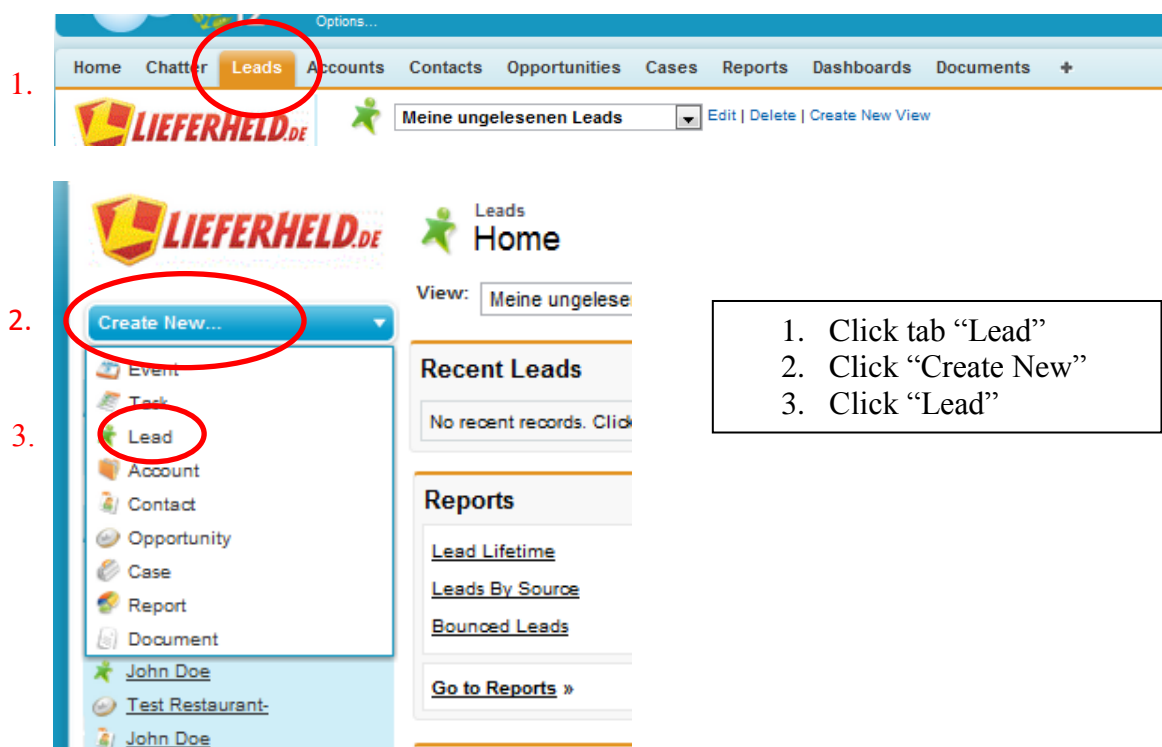


Figure 1: Create a lead

2.2 Setting up your Lead

1.

Lead Owner	Carolyn Bernstein	Lead Record Type	DE Lead
Id	<input type="text"/>	Lead Source	--None--
Company	Caro Test GmbH 2	Lead Status	New
Restaurant name	Caros Resto 2	lost reason	--None--
First Name	Mr. <input type="text"/>	next call	<input type="text"/> [05.04.2012 10:00]
Last Name	Bernstein	rating	--None--
Email	<input type="text"/>	cuisine	<div><div>Available</div><div>American Arabian Asian Chinese Deli</div><div>Chosen</div></div>
Website	<input type="text"/>	Key Account	<input type="checkbox"/>
Phone	<input type="text"/>	Restaurantservice	--None--
Mobile	<input type="text"/>	Lead Currency	EUR - Euro
Fax	<input type="text"/>		
competitor	<div><div>Available</div><div>bringbuttler.de Lieferando liefer-service.de others</div><div>Chosen</div></div>		
mail2fax	mail2fax@popfax.com		

Address Information

Street

Zip/Postal Code

City

State/Province

Country

Description Information

sales info

Optional

☒ Assign using active assignment rule

2.

Save

Save & New

Cancel



1. Fill in the fields as much as you can

2. Click "Save" or "Save or Save & New"


Figure 2: Lead edit

In the graph below, you can see what the entire lead looks like. The lead record consists of a number of fields that you can use to capture information about a potential lead.

Lead Detail
Edit Delete Convert Clone Sharing Find Duplicates

Lead Owner	 Carolyn Bernstein [Change]	Lead Record Type	DE Lead
Id		Lead Source	
Company	Caro Test GmbH 2	Lead Status	New
Restaurant name	Caros Resto 2	lost reason	
Name	Mr. Bernstein	next call	
Email		rating	
Website		cuisine 	
Phone		Key Account	<input type="checkbox"/>
Mobile		Restaurantservice	
Fax			
competitor			
mail2fax	mail2fax@popfax.com		

▼ Address Information

Address	Mohrenstr. 80 10117 Berlin
sales info 	
Created By	Carolyn Bernstein , 04.04.2012 10:31
Last Modified By	Carolyn Bernstein , 05.04.2012 10:54

Custom Links

[Google Search](#)
[Google Maps](#)

Edit Delete Convert Clone Sharing Find Duplicates

Figure 3: Lead detail 1

- ✓ **Lead owner:** the person who owns the lead
- ✓ **Company:** the name of the company
- ✓ **Restaurant name:** the restaurant name
- ✓ **First and last name:** the owner of the restaurant
- ✓ **Lead source:** define and track the sources of your leads
- ✓ **Lead status:** the status of the lead: new, in progress, converted, lost
- ✓ **Lost reason:** if the lead is lost, choose a reason: e.g. commission too high, duplicates etc.
- ✓ **Cuisine:** the food that is offered
- ✓ **Currency:** the currency of the country

VCSEmails
[New VCSEmail](#)
[Compose to Lead](#)
[Reply to Lead](#)
[Reply All to Lead](#)
[VCSEmails Help ?](#)

[Forward to Lead](#)

 No records to display

Open Activities
[New Task](#)
[New Event](#)
[New Meeting Request](#)
[Open Activities Help ?](#)

 No records to display

Activity History
[Log A Call](#)
[Mail Merge](#)
[Send An Email](#)
[Activity History Help ?](#)

 No records to display


Lead History
[Lead History Help ?](#)

Date	User	Action
05.04.2012 10:54	Carolyn Bernstein	Changed Lead Owner from Arne Stephan to Carolyn Bernstein.
05.04.2012 10:54	Carolyn Bernstein	Changed Owner (Assignment) from Carolyn Bernstein to Arne Stephan.
		Changed Zip/Postal Code to 10117.
		Changed City to Berlin.
		Changed Street to Mohnenstr. 60.


[Show more »](#) | [Go to list »](#)

HTML Email Status
[Send An Email](#)
[HTML Email Status Help ?](#)

 No records to display


Campaign History
[Add to Campaign](#)
[Campaign History Help ?](#)

 No records to display


Cases
[New Case](#)
[Cases Help ?](#)

Action	Case Number	Date/Time Opened	Priority	Subject	Status	closed	Owner Name
Edit Cls	01806843	04.04.2012 10:31	Normal	Restaurant Setup	Closed	No allowance to enter menu	Carolyn Bernstein

Figure 4: Lead detail 2

- ✓ **VCSEmail:** write Emails within Salesforce
- ✓ **Open activities:** click, e.g. “New Task”, for scheduling your tasks
- ✓ **Activity history:** the history of every call you logged, remember to always log a call
- ✓ **Lead history:** every action in the lead is logged
- ✓ **Cases:** for each lead the case “Restaurant Setup” is generated

3 The Restaurant Setup

Before a restaurant gets online you have to complete two tasks first:

1. Convince the restaurant to join Lieferheld -> verbal commitment
2. Receive the menu from the restaurants -> physical commitment

In order to assign these tasks to the responsible department a case is always attached to a lead, where someone independent from the lead owner can also work on it.

In this section

- Work with a lead
- My restaurant Setup
- Welcome Call
- Log a call
- Case: “Restaurant Setup”
- Convert the lead
- Edit Backend

3.1 Work with a Lead

Every lead has the case “Restaurant Setup” attached automatically. Work on the “Restaurant Setup”, before you convert the lead into an account.

Two cases are generated automatically in Salesforce: the “Restaurant Setup” and the zip code qualification.

The Restaurant Setup process is divided into two parts:

- ✓ **Welcome Call (WC):** Convince the restaurant to work with us.
- ✓ **Flyer collection:** Collect the menu of the restaurant.

3.2 My Restaurant Setup

Every sales agent has his/her own “Restaurant Setup” case he/she is responsible of.

These can be found in the tab “Cases” – “My Restaurant Setup”. These are all not yet completed Restaurant Setup cases.

1. **Cases** | Reports | Dashboards | Documents +

My Restaurant Setup | Edit | Delete | Create New View

2. New Case | Close | Change Owner | Change Status | [Filter]

Action	Case Number	restaurant	city	postcode	Date Opened +	Welcome Call	Flyer collected	Status
Edit Del [Icon]	01450899	Caro Resto	Berlin	10117	01.03.2012	<input type="checkbox"/>	<input type="checkbox"/>	New
Edit Del [Icon]	01450892	Asia Wok	sinsheim	74889	01.03.2012	<input type="checkbox"/>	<input type="checkbox"/>	New
Edit Del [Icon]	01445314	Pizzaservice Uno I...	ismaning	85737	29.02.2012	<input type="checkbox"/>	<input type="checkbox"/>	New
Edit Del [Icon]	01445183	Pizzeria Ciao Ciao	Hückelhoven	41836	29.02.2012	<input checked="" type="checkbox"/>	<input type="checkbox"/>	New
Edit Del [Icon]	01445095	Dolce Vita	Seebuck	83358	29.02.2012	<input type="checkbox"/>	<input type="checkbox"/>	New
Edit Del [Icon]	01445075	Asia Küche	München	80335	29.02.2012	<input type="checkbox"/>	<input type="checkbox"/>	New
Edit Del [Icon]	01444880	Imbiss Toni	Schwäbisch Hall	74523	29.02.2012	<input type="checkbox"/>	<input type="checkbox"/>	New
Edit Del [Icon]	01444854	Pizza Stadion	Voerde	46562	29.02.2012	<input type="checkbox"/>	<input type="checkbox"/>	New
Edit Del [Icon]	01444772	Rickys American P...	Celle	29221	29.02.2012	<input type="checkbox"/>	<input type="checkbox"/>	New
Edit Del [Icon]	01444701	Euro Döner & Pizza	Celle	29221	29.02.2012	<input type="checkbox"/>	<input type="checkbox"/>	New
Edit Del [Icon]	01444646	Bürgerhaus Gastst...	Aarb.-Rückershausen	65326	29.02.2012	<input type="checkbox"/>	<input checked="" type="checkbox"/>	New
Edit Del [Icon]	01444528	Akin Pizzaservice	Gnarrenburg	27442	29.02.2012	<input type="checkbox"/>	<input type="checkbox"/>	New
Edit Del [Icon]	01444415	Trattoria La Toscana	Wegberg	41844	29.02.2012	<input type="checkbox"/>	<input type="checkbox"/>	New
Edit Del [Icon]	01444391	Pizza Da Pietro	Kornwestheim	70806	29.02.2012	<input type="checkbox"/>	<input checked="" type="checkbox"/>	New
Edit Del [Icon]	01444312	Pizza Taxi Presto	Melsungen	34212	29.02.2012	<input type="checkbox"/>	<input type="checkbox"/>	New
Edit Del [Icon]	01444305	Rimini Pizza Hei...	Heppenheim	64646	29.02.2012	<input type="checkbox"/>	<input type="checkbox"/>	New
Edit Del [Icon]	01444254	Oishi Sushi	Bielefeld	33602	29.02.2012	<input type="checkbox"/>	<input type="checkbox"/>	New
Edit Del [Icon]	01444222	Mediterrano Liefer...	Lüneburg	21335	29.02.2012	<input type="checkbox"/>	<input type="checkbox"/>	New
Edit Del [Icon]	01444207	Pizzeria San Maroo	Aach	54298	29.02.2012	<input type="checkbox"/>	<input type="checkbox"/>	New
Edit Del [Icon]	01444194	Pizzeria La Piccola	Reppenstedt	21391	29.02.2012	<input type="checkbox"/>	<input type="checkbox"/>	New
Edit Del [Icon]	01444176	Nils Lieferservice	Lüneburg	21337	29.02.2012	<input type="checkbox"/>	<input type="checkbox"/>	New
Edit Del [Icon]	01444143	Pinguin Pizza Ser...	Reppenstedt	21391	29.02.2012	<input type="checkbox"/>	<input type="checkbox"/>	New
Edit Del [Icon]	01444097	Pinocio Lieferser...	Lüneburg	21337	29.02.2012	<input type="checkbox"/>	<input type="checkbox"/>	New
Edit Del [Icon]	01444080	Chilli Foodman	Lüneburg	21335	29.02.2012	<input type="checkbox"/>	<input type="checkbox"/>	New
Edit Del [Icon]	01444061	Restaurant Bacchus	Lüneburg	21339	29.02.2012	<input type="checkbox"/>	<input type="checkbox"/>	New

3.

Figure 5: My restaurant Setup

1. Click on the tab “Cases”
2. Select from the dropdown menu : My Restaurant Setup
3. Here are all your Restaurant Setups with the current status: Welcome Call done, Flyer collected, None

3.3 Making the Welcome Call

The Welcome Call is not to say “hi” to the restaurant, but to convince the restaurant to work with us and join our platform. The Welcome Call is necessary to get the agreement of the restaurant for further cooperation. The Welcome Call therefore is assigned to sales.

Welcome Call definition:

- ✓ You need to talk to the “owner” or “manager” of the restaurant or at least to someone who has permission to sign business contracts and make final decisions.
- ✓ The verification to join the portal can only be given by the Owner of the restaurant.
- ✓ You have to confirm the full name of the restaurant owner/decision maker and the legal form of the restaurant.
- ✓ You have to ask for the order sending method which can be phone, sms, Email, Fax and terminal.
- ✓ If you offer a trial period, you have to mention that it is still a contract though one with no commission. It is not allowed to say that there is no contract agreement. When the restaurant joins our platform, it agrees to our terms and conditions.
- ✓ Check the restaurants address
- ✓ Always log the call
- ✓ You have to attempt to receive the mobile number or email. If you don’t get it, you have to record the reason in “Log a Call”

Welcome Calls can have different outcomes:

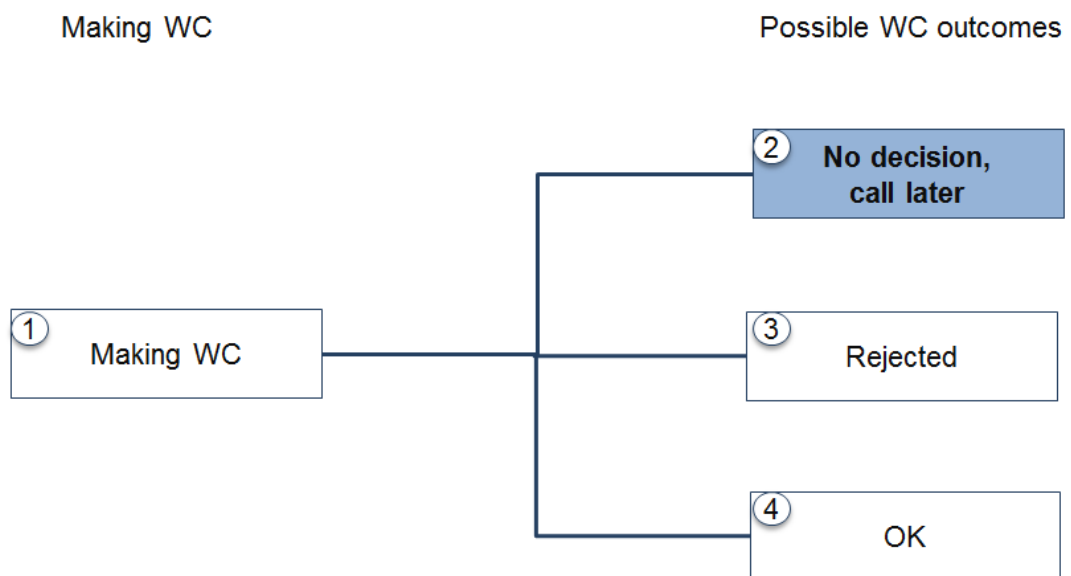


Figure 6: Making the WC: no decision


No decision, call later (2)

If you could not reach the directing manager right away, call later again. But make sure to log the call. If you have an appointment, set the next call date in your case “Restaurant Setup”.

3.4 Excuse: Log a call

After each contact with a restaurant you have to log the call, so you can keep track of information and discussed topics. The call always has to be logged in the **lead or ac-**


count, never in the case! The log is important so others can follow the history of an account.

1. 

Activity History
Log A Call
Mail Merge
Send An Email
Activity History Help ?

No records to display

Figure 7: Log a call

4. 

Task Edit
Save
Cancel

Task Information
I = Required Information

Assigned To Carolyn Bernstein
Related To Opportunity

2. Subject Call
Name Lead Bernstein

Due Date 07.03.2012 [07.03.2012]

Activity Currency EUR - Euro

3. Comments

Additional Information

Status Done

☐ Send Notification Email

Schedule follow up task

Task Information

Assigned To Carolyn Bernstein

Subject

Due Date [07.03.2012]

Activity Currency EUR - Euro

Comments

1. Click "Log A Call"
2. Click on "Subject" to choose what the call was about
3. Make a comment about your call
4. Save it

Figure 8: Log a call: Task edit

Case Detail

Edit

Delete

Close Case

Clone

Sharing

Case Owner	Carolin Bernstein [Change]	Case Record Type	DE Restaurant Setup [Change]
Case Number	01450899	Contact Phone	
Contact Name		Contact Email	
lead	Bernstein, Caro Test GmbH	next call	
Account Name	Caro Test GmbH	Lieferheld URL	
Backend Id			
restaurant	Caro Resto		
postcode	10117		
city	Berlin		
street	Mohrenstr.60		
opportunity			

1. Make an appointment when you want to call the restaurant again. You can then arrange your cases according to the next call date.

Figure 9: Next call

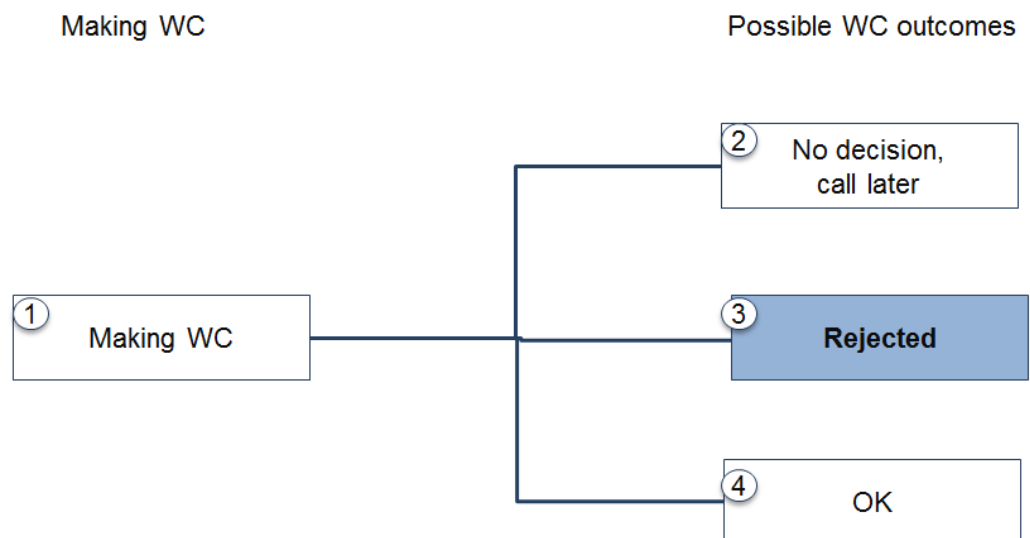


Figure 10: Making the WC: rejected

Outcome – Rejected (3)

If a restaurant persistently doesn't want to or is not able to work with us then you can close the case as "No allowance to enter menu":

- the owner declares he has no interest at all in doing business with Lieferheld

- you have tried to convince him three times in a row of working with Lieferheld without success

Case Edit [Save] [Cancel]

Case Information

Status | Closed ▼

closed | No allowance to enter menu ▼

Case Currency | Enter menu

Invalid

No allowance to enter menu

[Save] [Cancel]

Figure 11: Close case: no allowance to enter menu

Case Edit [Save] [Cancel]

Case Information

Status | Closed ▼

closed | Invalid ▼

Case Currency | Enter menu

Invalid

No allowance to enter menu

[Save] [Cancel]

Figure 12: Close case: invalid

If the Restaurant Setup for example is out of date or the lead does not exist anymore then you can close the case as „Invalid“.

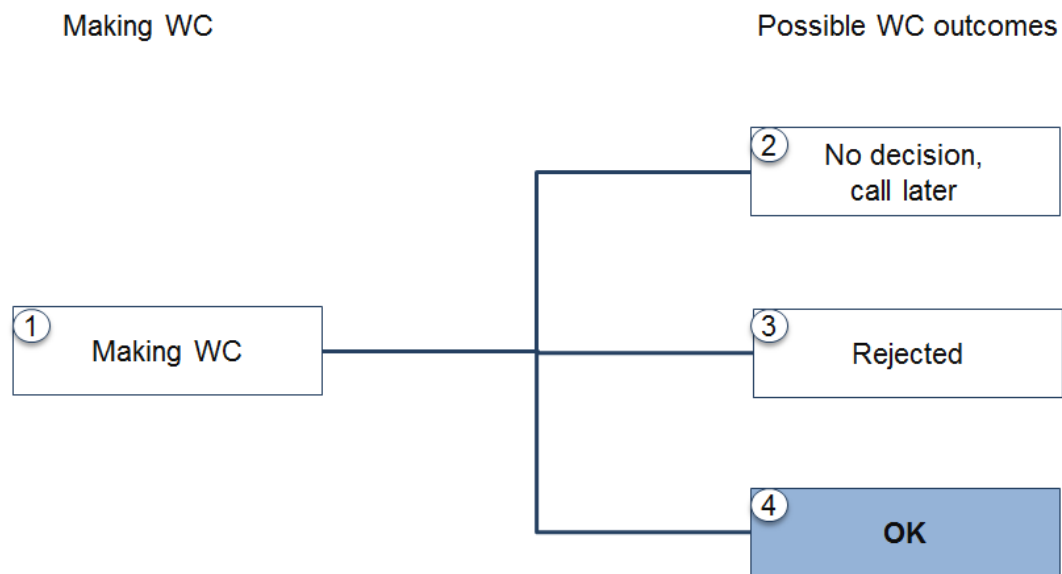


Figure 13: Making the WC: OK

OK - Positive Welcome Call (4)

When you have convinced a restaurant to work with us then you can mark the Welcome Call as positive.

Open the case “Restaurant Setup” and

- ✓ mark the Checkbox “Welcome Call”
- ✓ add the Date

3.5 The Case “Restaurant Setup”

Scroll down to the cases related list and click on the subject Restaurant Setup.

Cases New Case Cases Help ?							
Action	Case Number	Date/Time Opened	Priority	Subject	Status	closed	Owner Name
Edit Cls	01816821	05.04.2012 13:02	Normal	Restaurant Setup	New		Restaurant Setup Team Germany

Figure 14: Cases: Restaurant Setup

Case Detail

3.

Save

Cancel

Case Owner	Carolyn Bernstein [Change]	Case Record Type	DE Restaurant Setup [Change]
Case Number	01818821	Contact Phone	
Contact Name		Contact Email	
lead	Bernstein, Caro test GmbH 3	next call	
Account Name		Lieferheld URL	
Backend Id			
restaurant	Test Resto		
postcode	10117		
city	Berlin		
street	Mohrenstr. 80		
opportunity			

Add the check mark and the date:
 1. WC
 2. Date
 3. Save

Restaurant Information

1.	Welcome Call	✓	📎	Flyer collected	<input type="checkbox"/>
2.	Welcome Call	05.04.2012 13:03	📎	Flyer collected	

Figure 15: Case detail: WC

In order to add the restaurant on the Lieferheld platform you also need the menu flyer, delivery areas and delivery times. There are various possibilities to get the menu:

- the restaurant owner sends it in straight away (E-Mail, Fax, Snail-Mail, Website)
- editorial team sends someone to collect the menu

In any case, when the menu flyer is available it will also be marked.

city	Berlin		
street	Mohrenstr. 80		
opportunity			

Restaurant Information

	Welcome Call	✓		Flyer collected	✓
	Welcome Call	10.02.2012 12:17		Flyer collected	10.02.2012

Additional Information

Status	Closed
--------	--------

Figure 16: Case detail: Flyer collected

If the Welcome Call checkbox is marked then you can close the case with „Enter Menu“. The editorial team can start typing in the menu as soon as they collected the flyer and take the restaurant online.

1. Status: Closed

2. closed: Enter menu

3. Case Currency: Enter menu

4. Save

Figure 17: Close case: enter menu

Closing the case:

1. The status must be set to closed
2. Closed: choose “Enter menu”
3. Case currency: choose the accurate currency the country is using
4. Save it

The closed case “Restaurant Setup” with the closed status “Enter menu” will create a new case: “Menu Processing”. This case will go to the editorial team for further proceeding.

Cases							
New Case							
Cases Help ?							
Action	Case Number	Date/Time Opened	Priority	Subject	Status	closed	Owner Name
Edit Cls	01450899	01.03.2012 11:22	Normal	Restaurant Setup	Closed	Enter menu	Volkan Ayhan
Edit Cls	01512857	07.03.2012 11:24	Normal	Menu Processing	New		Editorial Team

Figure 18: Case: Menu processing



3.6 Convert the Lead

Now that the restaurant shows interest in working with us, convert the lead into an account!

An account is your future contact and each account has one to several opportunities with various stages. Now you'll always know what the status of the deal is.

Lead Detail

Edit
Delete
Convert
Clone
Sharing
Find Duplicates



Lead Owner	 Carolyn Bernstein [Change]	Lead Record Type	DE Lead
Id		Lead Source	
Company	Caro Test GmbH	Lead Status	New
Restaurant name	Caro Resto	lost reason	
Name	Mr. Bernstein	next call	
Email		rating	
Website		cuisine	
Phone		VIP Kunde	<input type="checkbox"/>
Mobile		Restaurantservice	

Figure 19: Convert the lead

Convert Lead

Record Owner |

Send Email to the Owner | ☐

1. Account Name | [View](#)

2. Opportunity Name |

☐ Do not create a new opportunity upon conversion.

Converted Status |

Task Information

Subject |

Due Date |

Activity Currency |

Comments |

Additional Information

Status |

Priority |

☐ Send Notification Email

Reminder

Reminder | ☒

3.

Convert a lead:

1. The account name will be adopted from the lead
2. Give your opportunity a name
3. Click convert

Figure 20: Convert lead

3.7 Excuse: Create a restaurant in the Backend

Once a lead is qualified, it is time to create the account in the Backend system. All information can be taken from the lead/account.

The screenshot shows the 'Restaurants' management interface. It includes a navigation sidebar on the right with links like 'Top', 'Restaurant list', 'Filter', and 'Namenssuche'. The main area has a 'list restaurants' section with a dropdown menu for 'City' (set to 'Berlin') and a text input for 'name of new restaurant'. A green cross icon is next to the input field. Below this is a table of existing restaurants with columns: Name, City, Street, Maintainer, Status, Open todos, Central Billing, Box, Online, Menu, and Signed. The table lists various restaurants like 'Pizzeria Kart World', 'Nick's Pizza', 'Thai-Ha', etc. Annotations with orange arrows point to specific elements: '1.' points to the 'City' dropdown, '2.' points to the green cross icon, and '3.' points to the 'Name' column header.

Name	City, Street	Maintainer	Status	Open todos	Central Billing	Box	Online	Menu	Signed
Pizzeria Kart World	Am Juliusturm 15-29, 13599 Berlin	-	created	0	✓	✗	✓	✓	✓
Nick's Pizza	Prinzenallee 37, 13359 Berlin	-	created	0	✓	✗	✓	✓	✓
Thai-Ha	Brunnenstraße 4, 10119 Berlin	-	created	0	✓	✓	✓	✓	✓
American Burger	Prinzenallee 37, 13359 Berlin	-	created	0	✓	✓	✓	✓	✓
American Burger	Prinzenallee 37, 13359 Berlin	-	created	0	✓	✗	✗	✓	✓
Pizza-Boy	Kattegatstraße 13, 13359 Berlin	-	created	0	✓	✓	✓	✓	✓
Pizza Boy	Kattegatstraße 13, 13359 Berlin	-	rejected	0	✓	✗	✗	✓	✓
Nick's Pizza	Prinzenallee 37, 13359 Berlin	-	created	0	✓	✗	✗	✓	✓
Punjabi Taste ORIGINAL	Hindenburgdamm 57A, 12203 Berlin	-	created	0	✓	✗	✗	✗	✓
PAKISTANISCHE ART									
Restaurant Mexiko	Alt-Britz 61, 12359 Berlin	-	created	0	✗	✗	✓	✓	✗
Pizza Bella Casa	Danziger Straße 67, 10435 Berlin	-	created	0	✓	✗	✓	✓	✓
Persisches Restaurant	Martin-Luther-Straße 88, 10825 Berlin	-	created	0	✓	✓	✗	✓	✓
Molana									
Royal Burger	Boschweg 13, 12057 Berlin	-	created	0	✗	✗	✓	✓	✓

Figure 21: Backend: list restaurant

1. Enter the name of the city
Select it in the dropdown menu
2. Enter the name of the restaurant and click on the green cross
3. Wait until the newly added restaurant shows up and click on the name of the restaurant to edit it's information
4. Fill in all information and tick the according check marks
Owner, Company Name, Salesforce ID, Tariff and so on

crm data

Restaurant Data Switch to Admin

a) Orders: 63

b) Owner: Herr Joussef Nissr

d) Menu: ☒ Pizza.de ☐ YD ☐ Online: ☒ e) save f)

Company Name: Reachable: True, last fax on März 7, 2012 was SENT welcome fax trial confirmation

Tax Number: Comment: 10.

Company Number:

Status: created Maintainer: Nobody Clai

Salesforce ID: 0012000000pxU9G

Tarif: Superhelden Tarif

Bloomsburys ID:

Is Gastrologic restaurant? ☐

View active contract Preview contract send contract

Terminal Data

Username: kart-world ICC (SIM-ID): Opening Override: Neutral

Password: 8544 Box serial #: g) Reachable Status: True

c) Helicom Box Data unlink

Device id: HPLH-9186010854

Phone nr: +4915144880241

Figure 22: Backend: CRM data

After the sheet has opened up enter the appropriate information:

- a) Shows the number of orders so far
- b) General information:
 - ✓ Owner: for the German case start with **Herr / Frau**
 - ✓ Name of the company/Restaurant
 - ✓ Salesforce ID: see below
 - ✓ Tariff: choose the tariff in the dropdown menu
- c) Needs to be completed by the box shipper when the restaurant gets a Terminal
- d) Checkbox showing if the menu is already created
- e) Checkbox to get the restaurant online
- f) Click to save all setting in CRM data (saving is confirmed by a yellow flash)
- g) The reachable status shows the restaurants availability for Lieferheld



In order to connect the Backend to Salesforce you have to insert the Salesforce ID.

- ✓ Copy the Salesforce ID of the account (NOT the lead ID) into the respective field in the Backend. You'll find the Salesforce ID in the URL
- ✓ Vice versa: The Backend ID needs to be added to the Salesforce account. Therefore use the last numbers of the Backend URL and fill them in.

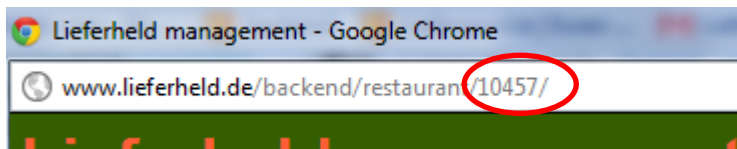


Figure 23: Backend ID 1

1.

Back to List: Cases

Contacts [1] | VCSEmail [0] | Open Activities [0] | Activity History [5+] | Account History [3] | Opportunities [1] | Cases [2] | Notes & Attachments [1]

Business Account Detail Edit Delete Sharing

backend id	10457	rating	1.Basic lead
Account Owner	Ali El Ali [Change]	Competitor	
Account Name	Sampiyon Döner [View Hierarchy]	Website	
Restaurant name	Sampiyon Döner	Our URL	
Parent Account		Key Account	<input type="checkbox"/>
Phone	020339779942	PLZ Polygon	<input type="checkbox"/>
Owner Name		Restaurantservice	
Description			
cuisine	Turkish		

Figure 24: Backend ID 2

2.

3.

Business Account Edit Save Save & New Cancel

Account Information I = Required Information

backend Id	10457	rating	1.Basic lead
Account Owner	Ali El Ali	Competitor	Available: Lieferando, liefer-service.de, pizza.de
Account Name	Sampiyon Döner	Website	
Restaurant name	Sampiyon Döner	Our URL	
Parent Account		Key Account	<input type="checkbox"/>
Phone		PLZ Polygon	<input type="checkbox"/>

Figure 25: Business account edit

Enter Backend ID:

1. Go back to your account and click edit.
2. Enter Backend ID
3. Save

1.



Figure 26: Salesforce ID 1

2.

Restaurant Data

Orders: 28

Owner: Herr Mädtke & Knihs

Company Name: Pizza Planet Mädtke-Knih Reachable: F

Tax Number: Comment:

Company Number:

Status: created Maintainer:

Salesforce ID: 0012000000qps6O

Tarif: Superhelden Tarif

Weekly Payment ☐

VIP ☒

Bloomsburys ID

Is Gastrologic restaurant? ☐

Enter Salesforce ID:

Go to the Salesforce Account

1. Copy the Salesforce ID
2. Enter the Salesforce ID into the Backend
3. Save

Figure 27: Salesforce ID 2

The screenshot shows a web form for restaurant setup, divided into three main sections: Commission, Address, and Contact Information. The form is annotated with red numbers 1 through 9 and orange arrows pointing to 'save restaurant' buttons.

- 1.** Points to the 'since' date field in the Commission section.
- 2.** Points to the 'Name' field in the Address section.
- 3.** Points to the 'City' dropdown menu in the Address section.
- 4.** Points to the 'Restaurant address' field in the Address section.
- 5.** Points to the 'Main Category' dropdown menu in the Address section.
- 6.** Points to the 'Phone Numbers' section in the Contact Information section.
- 7.** Points to the 'Relay Methods' section in the Contact Information section.
- 8.** Points to the 'Central Billing' section in the Payment Methods section.
- 9.** Points to the 'Fax Gateway' dropdown menu in the Contact Information section.

Orange arrows point to the 'save restaurant' buttons at the end of each section: Commission, Address, Contact Information, and Payment Methods.


Figure 28: Backend details

1. Fill in the contractual agreed percentage (commission) and when it was arranged

Make sure you use a full stop instead of a comma

2. Complete the restaurant's name (subtitle and description is not of importance)
3. Select the city in which the restaurant is located
4. Enter the zip code and the address
5. Select the category of the cuisine (done by editorial)

At first the main category and then further cooking-styles, press Strg/ctrl to select more than one category

6. Click the plus () to add each email, phone and fax numbers separately and tick the according box

7. Choose the relay method

In most cases it is „fax“; if the restaurants receives a terminal then the department who sets up the terminal will mark “terminal”; for orders via e-mail check „email“ and fill in the URL

8. Complete the data of the restaurant's bank account; especially make the check mark of central billing, if the restaurant wishes Online Payment

9. Save the information by clicking one of the buttons

10. Button welcome fax and trial confirmation (see above Figure 22):

Click to send a test fax to the restaurant to find out if the channel is available:

- “Welcome fax“ is for restaurants with a contract
- “Trial confirmation” is for restaurants in testing phase (do not send a Fax, when the restaurant has a Lieferheld-Box).

When the channel fax works then the status will be “sent”.

If not then the status will be “wrong” and you have to check with the restaurant if their channel fax is working.

4 Account

In this section


- Short glossary of account details
- How to use an account

A qualified lead needs to be converted into an account. All information is visible here, so the account represents the collected data of your restaurant.

[NOTES & ATTACHMENTS \(0\)](#)

Business Account Detail

Edit
Delete
Sharing

backend Id		rating ?
Account Owner	 Carolin Bernstein [Change]	Competitor
Account Name	Caro Test GmbH [View Hierarchy]	Website
Restaurant name	Caro Resto	Our URL ?
Parent Account		VIP Kunde <input type="checkbox"/>
Phone		PLZ Polygon <input type="checkbox"/>
Contact Name		Restaurantservice
Description		
cuisine ?		

▼ Address Information

Billing Address	Mohrenstr.60 10117 Berlin	Shipping Address
-----------------	------------------------------	------------------

▼ Account Informationen - Backend

Online Status	<input type="checkbox"/>	Order Anzahl
Direct Debit	<input type="checkbox"/>	Main Category
Central Billing	<input type="checkbox"/>	

▼ Express Box Informationen - Backend

Box Reachable	<input type="checkbox"/>
Username Box	
Passwort Box	

Edit

Activity History
[Log A Call](#)
[Mail Merge](#)
[Send An Email](#)
[Activity History Help ?](#)

No records to display

Account History
[Account History Help ?](#)

Date	User	Action
07.03.2012 11:49	Carolyn Bernstein	Created by lead convert

Opportunities
[New Opportunity](#)
[Opportunities Help ?](#)

Action	Opportunity Name	Stage	Amount	Close Date
Edit Del	Testphase	20% Interest qualified		31.03.2012

Cases
[New Case](#)
[Cases Help ?](#)

Action	Case	Date/Time Opened	Contact Name	Priority	Subject	Status	closed	Date/Time Closed	Owner
Edit Cls	01450899	01.03.2012 11:22		Normal	Restaurant Setup	Closed	Enter menu	07.03.2012 11:24	Volkan Ayhan
Edit Cls	01512857	07.03.2012 11:24		Normal	Menu Processing	New			Editorial Team

Notes & Attachments
[New Note](#)
[Attach File](#)
[Notes & Attachments Help ?](#)

No records to display

Figure 29: Accounts

- ✓ **“Edit”**: you can modify fields
- ✓ **“Account owner”**: the account owner is usually assigned automatically to the agent who is responsible for the area
- ✓ **“Account name”**: represents the name of the restaurant you want to track

All information according to a restaurant should be documented in the account, e.g. attachments, contracts, etc. This is your starting point to work:

- ✓ **Tab “Opportunity”**: generate a new opportunity or edit an old one by clicking on the opportunity name.
- ✓ **Tab “Cases”**: generate a new one or modify the existing by clicking on the case number.
- ✓ **Tab “Notes & Attachments”**: attach files, like the signed contracts for each product

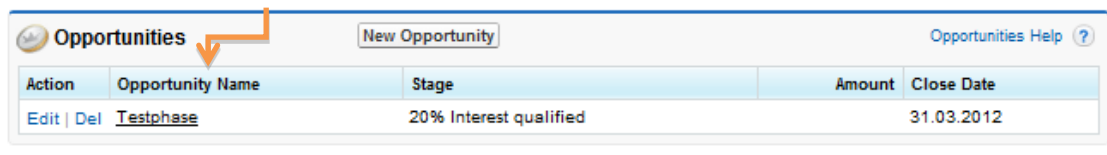
5 Opportunities

In this section

- Opportunity detail
- Add opportunities
- Choose a product and price books
- Create and send quotes
- Create PDF's
- Discount request - internal

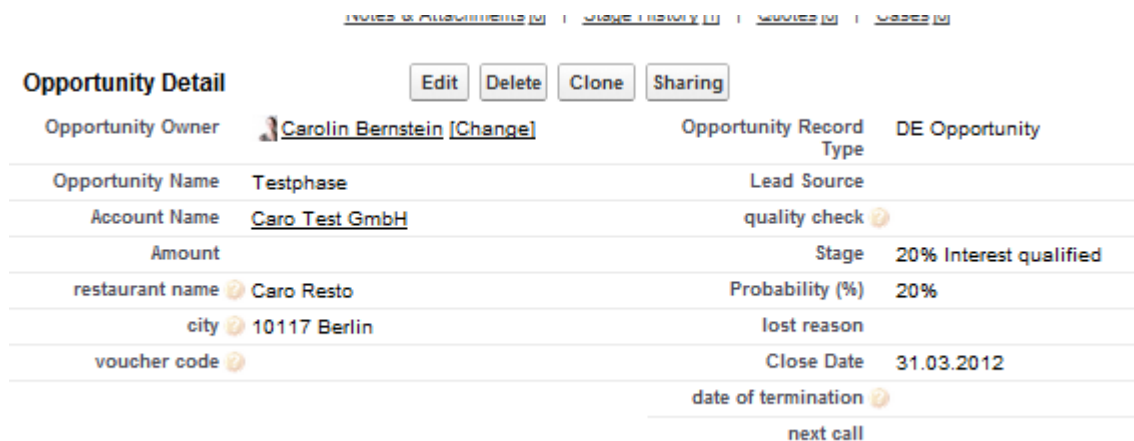
Opportunities are the essence of sales. Once you qualified a lead and converted it into an account then also an opportunity is created automatically. Every account has at least one opportunity, but you can manage more opportunities at the same time and track each opportunity with greater precision.

A newly converted lead always has an opportunity with the stage status of “20% Interest qualified”. From this stage on the opportunity can go through various stages.



Action	Opportunity Name	Stage	Amount	Close Date
Edit Del	Testphase	20% Interest qualified		31.03.2012

Figure 30: Opportunity



Opportunity Detail		Opportunity Record Type		DE Opportunity	
Opportunity Owner	Carolyn Bernstein [Change]	Lead Source		quality check	
Opportunity Name	Testphase	Stage	20% Interest qualified	Probability (%)	20%
Account Name	Caro Test GmbH	lost reason		Close Date	31.03.2012
Amount		date of termination		next call	
restaurant name	Caro Resto				
city	10117 Berlin				
voucher code					

Opportunity Field History
[Opportunity Field History Help ?](#)

Date	User	Action
07.03.2012 11:49	Carolin Bernstein	Created by lead convert

Contact Roles
[Contact Roles Help ?](#)
[New](#)

Action	Contact Name	Account Name	Email	Phone	Role	Primary
Edit Del	Bernstein	Caro Test GmbH				<input type="checkbox"/>

Products
[Add Product](#)
[Choose Price Book](#)
[Sort](#)
[Products Help ?](#)

No records to display

Notes & Attachments
[New Note](#)
[Attach File](#)
[Notes & Attachments Help ?](#)

No records to display

Stage History
[Stage History Help ?](#)

Stage	Amount	Probability (%)	Close Date	Last Modified
20% Interest qualified	EUR 0,00	20%	31.03.2012	Carolin Bernstein , 07.03.2012 11:49

Quotes
[New Quote](#)
[Quotes Help ?](#)

Clicking New Quote copies the opportunity products to the new quote as quote line items.

Cases
[Cases Help ?](#)

No records to display

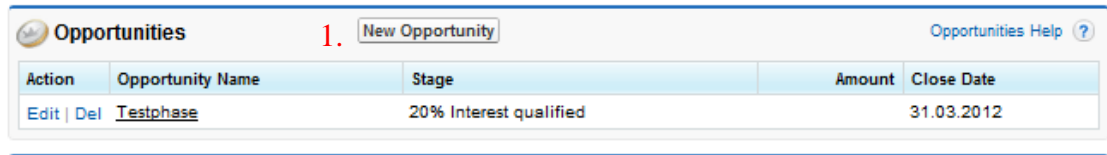
[^ Back To Top](#)
[Always show me](#)
[more records per related list](#)

Figure 31: Opportunity detail

- ✓ **Opportunity owner:** Does not have to be the account owner; it is the one who owns the opportunity
- ✓ **Opportunity name:** Describes the opportunity
- ✓ **Account name:** The account, the opportunity belongs to
- ✓ **Restaurant name and city:** Generated automatically from the account
- ✓ **Stage:** Qualify the stage of the opportunity
- ✓ **Probability:** The confidence factor associated with the likelihood that you will win the opportunity. Each sales stage is associated with a default probability to close. Typically, you do not need to edit this field; it gets assigned automatically by the Stage option that you pick.
- ✓ **Close Date:** The date which the contract is fulfilled or the day you think the contract is being signed at latest. If the date cannot be hold, the close date must be changed to the next reachable date
- ✓ **Products:** Add the related product to the opportunity

5.1 Add opportunities

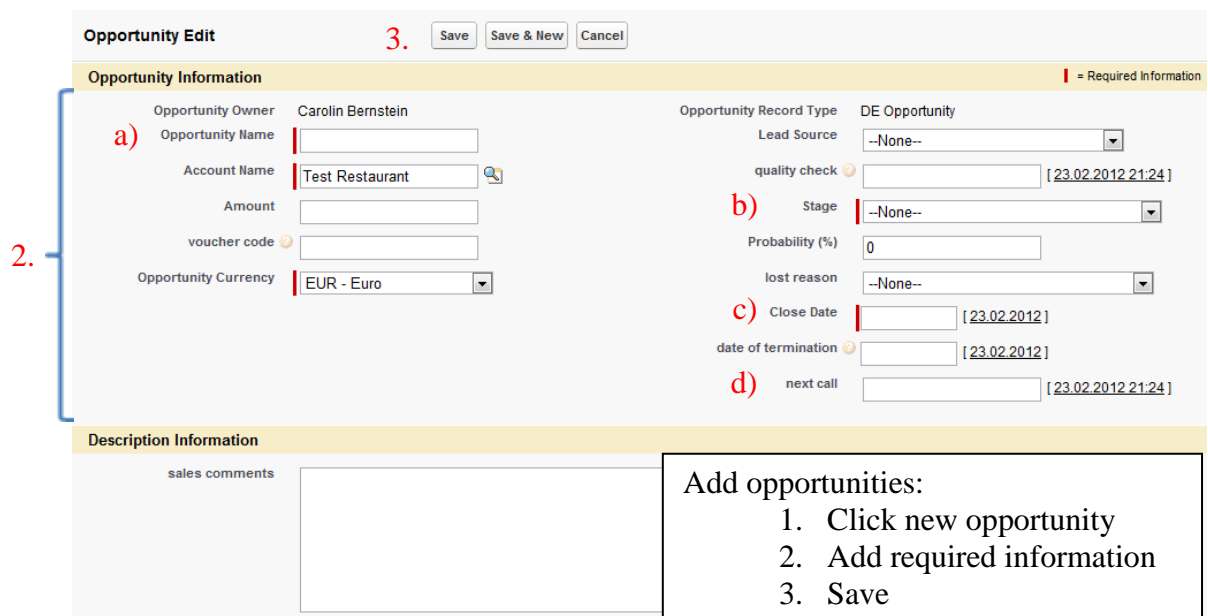
Create a separate opportunity for each possible sale. For example if you have the chance to sell e.g. Pizza-Boxes or Flyer, do the following steps:



The screenshot shows a table titled 'Opportunities' with a 'New Opportunity' button. The table has columns: Action, Opportunity Name, Stage, Amount, and Close Date. A single row is visible with the following data:

Action	Opportunity Name	Stage	Amount	Close Date
Edit Del	Testphase	20% Interest qualified		31.03.2012

Figure 32: New opportunity



The screenshot shows the 'Opportunity Edit' form. It has a 'Save', 'Save & New', and 'Cancel' buttons. The form is divided into two main sections: 'Opportunity Information' and 'Description Information'. The 'Opportunity Information' section contains fields for Opportunity Owner, Opportunity Name, Account Name, Amount, voucher code, Opportunity Currency, Opportunity Record Type, Lead Source, quality check, Stage, Probability (%), lost reason, Close Date, date of termination, and next call. The 'Description Information' section contains a 'sales comments' text area. Annotations a, b, c, and d point to specific fields: a) Opportunity Name, b) Stage, c) Close Date, and d) next call. A blue bracket labeled '2.' spans the 'Opportunity Information' section. A red bracket labeled '3.' points to the 'Save' button. A red bracket labeled '1.' points to the 'New Opportunity' button in Figure 32.

Add opportunities:

1. Click new opportunity
2. Add required information
3. Save

Figure 33: Opportunity edit

1. Scroll down to the opportunities related list and click new opportunity (Fig. 32, Fig. 33 will show up)

The edit mode of a new opportunity appears. The “Account Name” is automatically filled in

Fill in the fields as much as you can or required

- a) Enter the name of the opportunity
- b) Select the stage to which you think the contract is already in advance
- c) Enter the close date
- d) Optional: next call

2. Click Save when you are done

The opportunity detail page now appears. You can click the edit Button on this page at any time if you need to modify the record.

5.2 Choose a product

Opportunities always need a related product that is sold. Attached products are important for tracking and reports.

- ✓ **Products:** for each opportunity add a new product
- ✓ **Price book:** a collection of products and their associated prices.

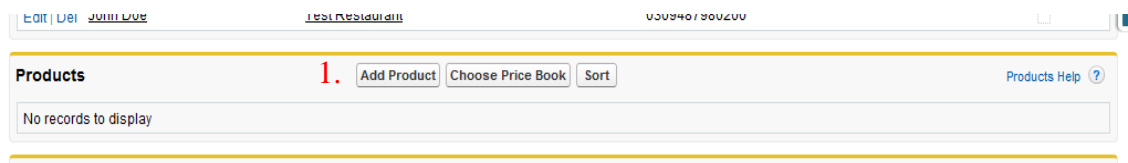


Figure 34: Add product and choose price book

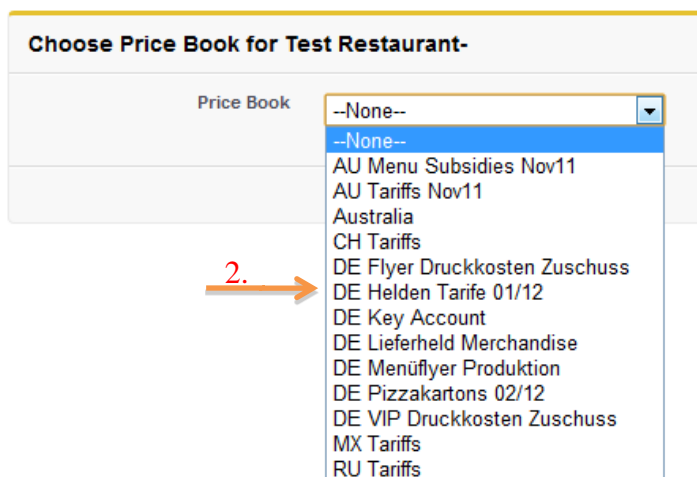


Figure 35: Price Book

Product Selection:

1. Click add product (Fig. 34)
2. Choose Price Book (Fig. 35)
3. Select product (Fig. 36)
4. Add required information (Fig. 37)
5. Click Save

Opportunity Test Restaurant-
Product Selection

Enter your keyword and filter criteria, then click Search to begin your search. Click More filters to use more than one filter. Search results keyword and filter entries.

Select Cancel

Find Products [11]

By Keyword

By Field Filter

--None--

--None--

[More filters >>](#)

Search

<input type="checkbox"/>	Product Name ↑	Price Book Name	Product Code	List Price	P
<input type="checkbox"/>	Express Box	DE Helden Tarife 01/12	—	EUR 290,00	
<input type="checkbox"/>	Express Box 01/12	DE Helden Tarife 01/12	—	EUR 0,00	
<input type="checkbox"/>	Express Box 6 Monate Ratenzahlung	DE Helden Tarife 01/12	—	EUR 49,00	
<input type="checkbox"/>	Helden Tarif 01/12	DE Helden Tarife 01/12	—	EUR 90,00	
<input type="checkbox"/>	Minihelden Tarif 01/12	DE Helden Tarife 01/12	—	EUR 90,00	
<input type="checkbox"/>	Spezialangebot Express Box	DE Helden Tarife 01/12	—	EUR 290,00	
<input type="checkbox"/>	Superhelden Tarif 01/12	DE Helden Tarife 01/12	—	EUR 290,00	
<input type="checkbox"/>	Superhelden Tarif 01/12 Ratenzahlung 6 Monate	DE Helden Tarife 01/12	—	EUR 49,00	
<input type="checkbox"/>	Testphase Express Box	DE Helden Tarife 01/12	—	EUR 290,00	
<input type="checkbox"/>	Testphase Express Box 6 Monate Ratenzahlung	DE Helden Tarife 01/12	—	EUR 49,00	
<input type="checkbox"/>	Upgrade Superhelden Tarif 01/12	DE Helden Tarife 01/12	—	EUR 0,00	

Select Cancel

Figure 36: Product Selection

4.

Save Save & More Cancel

Product	Quantity	Sales Price	Line Description	commission
Helden Tarif 01/12	<input type="text"/>	90,00	<input type="text"/>	<input type="text"/>

5.

Save Save & More Cancel

Figure 37: Product information

Change the stage status up to $\geq 95\%$ when the product is sold and the closing date to the date of contract submission. For each new product you have to choose a new opportunity.

Opportunity Detail
Save
Cancel

Opportunity Owner	Carolin Bernstein [Change]	Opportunity Record Type	DE Opportunity
Opportunity Name	Testphase	Lead Source	
Account Name	Caro Test GmbH	quality check	
Amount	EUR 90,00	Stage	95% Order confirmation sent
restaurant name	Caro Resto	Probability (%)	95
city	10117 Berlin	lost reason	
voucher code		Close Date	31.03.2012
		date of termination	
		next call	

Figure 38: Opportunity detail: stage 95 %

5.3 Create and send quotes

Now you can create a quote for the restaurant in Salesforce.

You can create a quote from an opportunity.

Quotes New Quote [Quotes Help ?](#)

Clicking New Quote copies the opportunity products to the new quote as quote line items.

Figure 39: Quote

Quote Edit Save Cancel

All opportunity products will be added as quote line items.

Quote Information ! = Required Information

Quote Name Syncing ☐

Opportunity Name Testphase

Account Name Caro Test GmbH

Bill To Name Caro Test GmbH

commission per order

Totals

Subtotal	EUR 90,00	Tax	<input type="text"/>
Discount	0,00%	Shipping and Handling	<input type="text"/>
Total Price	EUR 90,00	Grand Total	EUR 90,00

Prepared For

Contact Name

Email

Phone

Fax

Address Information

Bill To Street

Bill To Zip/Postal Code

Bill To City

Bill To State/Province

Bill To Country

Save Cancel

Add info:

1. Click new quote
2. Fill in gaps
3. Save

Figure40: New quote

5.4 Create PDF's

You can generate quote PDFs to print or email to your customers.

Quote Detail 1. [Edit](#) [Delete](#) [Create PDF](#) [Email Quote](#) [Start Sync](#)

Quote Number	00006534	Syncing <input type="checkbox"/>
Quote Name	Heldentarif	
Opportunity Name	Test Restaurant	
Account Name	Test Restaurant	
Bill To Name	Test Restaurant	
your Id		
fax note	Antwort Auftragsbestätigung Restaurant mit der Lieferheld ID:	
title	Sehr geehrte Frau Bernstein	
billing address	Test Restaurant	
	Mohrenstr. 60 10117 Berlin	
commission per order	10,00%	
start of contract	31.03.2012	

vit

Quote Detail 2. [Edit](#) [Delete](#) [Create PDF](#) [Email Quote](#) [Start Sync](#)

Quote Number	00006981	Syncing <input type="checkbox"/>
Quote Name	Heldentarif	
Opportunity Name	Testphase	
Account Name	Caro Test GmbH	

Figure 41: Create PDF

Sending quotes:

1. Click create PDF
2. Choose the right a template
3. Save

3.

Choose Template...

Template

Create PDF Cancel

Search for Quote Templates ~ salesforce.com - Enterprise Edition - Google Chrome

https://emea.salesforce.com/_ui/common/data/LookupPage?iknm=chooseTemplateOverlayBase&lktp=QUOTE_TEMPLA

Lookup

Search Go!

You can use "*" as a wildcard next to other characters to improve your search results.


Search Results

Quote Template	Created By	Modified By
AU Order Confirmation Free Start Hero E-Mail	Global Admin Team, 07.11.2011 17:31	Global Admin Team, 07.11.2011 17:31
AU Order Confirmation Free Start Super Hero Upfront E-Mail	Global Admin Team, 08.11.2011 17:55	Global Admin Team, 08.11.2011 17:55
AU Order Confirmation Free Start Hero Fax, Mail	Global Admin Team, 02.11.2011 21:10	Global Admin Team, 02.11.2011 21:10
AU Order Confirmation Free Start Sidekick Fax, Mail	Global Admin Team, 03.11.2011 22:41	Global Admin Team, 03.11.2011 22:41
AU Order Confirmation Free Start Super Hero Instalment Fax, Mail	Global Admin Team, 03.11.2011 23:22	Global Admin Team, 03.11.2011 23:22
AU Order Confirmation Free Start Super Hero Instalment Fax, Mail	Global Admin Team, 08.11.2011 17:55	Global Admin Team, 08.11.2011 17:55

Figure 42: Choose Template

The quote is only created and the contract not sent yet. Click “Save and Email Quote” to send. Now the contract has been send and needs confirmation by the customer. It is possible to upgrade the probability up to 95%. Go back to the spreadsheet: Opportunity details, to do so.

PDF Preview

Lieferheld GmbH | Mohrenstr. 60 | 10117 Berlin


Restaurant
Test Restaurant
Mohrenstr. 60
10117 Berlin

Created Date
22.02.2012
start of contract
31.03.2012

Contact Name
John Doe
Prepared By
Carolyn Bernstein

Sehr geehrter Kunde,
wir bestätigen Ihnen hiermit Ihren Auftrag zur Registrierung Ihres Lieferservices auf der Online Bestellplattform www.lieferheld.de.
Wie telefonisch besprochen, richten wir Ihren Account mit den folgenden Konditionen ein:

Umsatzprovision pro übermittelter Bestellung: 10%

Product	List Price	Sales Price	Quantity	Total Price
Express Box 01/12	EUR 0,00	EUR 0,00	1,00	EUR 0,00
		Total Price	EUR 0,00	
		Grand Total	EUR 0,00	

Leistungen Helden Tarif

- Kostenlose Änderung Ihrer Speisekarte
- Kundenservice täglich von 10.00-24.00 Uhr unter Tel: 030 948 798 0300
- Kostenlose eigene Internetadresse
- Online Zahlungsmöglichkeit für Ihre Kunden
- Sie bekommen ihre Abrechnung per E-Mail
- Keine Mindestvertragslaufzeit, Keine monatliche Grundgebühr

Mit freundlichen Grüßen
Ihr Lieferheld Team

Figure 43: PDF Preview

5.5 Excuse: Create case discount request

Cases 1. New Case Cases Help ?									
Action	Case	Date/Time Opened	Contact Name	Priority	Subject	Status	closed	Date/Time Closed	Owner
Edit Cls	01450899	01.03.2012 11:22		Normal	Restaurant Setup	Closed	Enter menu	07.03.2012 11:24	Volkan Ayhan
Edit Cls	01512857	07.03.2012 11:24		Normal	Menu Processing	New			Editorial Team

Figure 44: Cases

New Case
Select Case Record Type

Select a record type for the new case. To skip setup page.

Select Case Record Type

Record Type of new record

discount request - internal

DE Pizzaboxes

DE Restaurant Setup

DE Retention

DE Sales Task

DE Support VIP Express Box

DE Take Restaurant Online

DE Tariff Change

DE VIP Restaurants

discount request - internal

Fax

invoice request

menu changes

Menu collection

menu processing

qualify postcode

Select Case Record Type

Record Type of new record

discount request - internal

3. Continue Cancel

Figure 45: Discount request - internal

Convert a lead:

1. Click new case
2. Choose template: discount request
3. Click continue

4.

Case Edit
Save Save & Close Save & New Check Spelling Cancel

Case Information ! = Required Information

Case Owner Carolin Bernstein

Contact Name

Account Name Test Restaurant

Person in charge --None--

import city

import restaurant

Case Currency EUR - Euro

Unreachable Art --None--

Case Record Type discount request - internal

new commission

lead

Additional Information

Status New

Case Reason Discount request

Case Origin --None--

Priority Normal

Description Information

Subject

Description

Convert a lead:
4. Fill out all the required information:
a. Contact name
b. Status
c. Case origin
d. New commission
e. Description
5. Click submit approval

Figure 46: Request internal

5. Submit for Approval

Approval History [Approval History Help](#)

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Discount Request						Approved
	22.02.2012 11:44	Approved	Daniel Dinh	Daniel Dinh		
Approval Request Submitted						
	20.02.2012 14:49	Submitted	Carsten Zuhse	Carsten Zuhse		

Figure 23: Approval history

Submit your approval to the responsible person aka supervisor, who can permit the request. The discount request has to be authorized, if you would like to offer a commission rate which is at least 1 percentage point below the regular percentage rate. After the discount request has been accepted the status is highlighted in green.

Recap: Steps of the Sales Process

Typically you will be doing only Welcome Calls in the first month as a sales agent at Liferheld. **After you have had a chance to build a pipeline, you will be doing**

Welcome Calls

Possible outcomes:

- No decision
→ Log the call, call later
- Rejected
→ Close the case
- OK
→ Mark checkbox “Welcome Call”, add date