# **FUNNEL**

Version 1.0

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### **Funnel**

### 1. Funnel Setup:

Using funnel setup, CM can give access rights to Add New/Edit/View funnel deals to their sales team. Only CM/ IT team will have access to funnel setup.

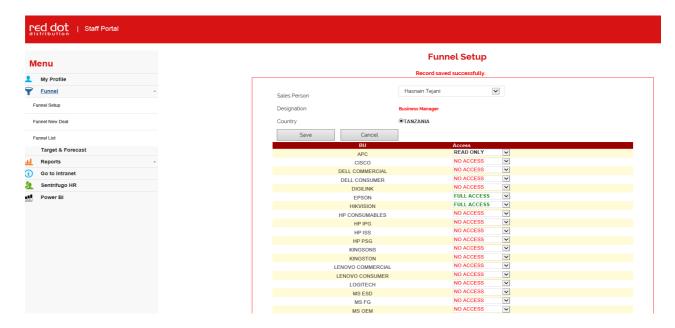
## To access funnel setup - > Click on Funnel from main menu -> Funnel Setup Steps:

- Select the salesperson from List
- Designation and Country will be fetched automatically.
- List of BU's will be shown to you, select the access for each BU, by default access values is NO ACCESS

Below are Access Types for BU, COUNTRY

- ✓ **FULL ACCESS** means sales person can add/edit/view funnel deals for specific BU for specific country.
- ✓ READ ONLY means sales person can only view the deals for specific BU for specific country.
- ✓ NO ACCESS means sales person can't add/edit/view funnel deals

Please see below screenshot of funnel setup



## 2. Funnel New Deal:

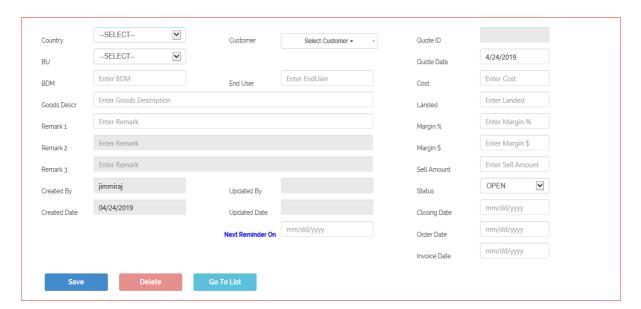
Using funnel new deal form, authorize personnel can create new funnel deal.

## To access Funnel New Deal - > Click on Funnel -> Funnel New Deal Steps:

- Select the Country (Customers will load into customers list based on selected country)
- Select BU from list (You can see only those BU's for which you have FULL ACCESS in funnel setup)
- Enter BDM, End User, Goods description, Remarks.
- Enter Cost, Landed and enter either Margin % or Margin USD and total sell amount will be calculated automatically.
- Select Deal Status, Exp Closing date etc.
- You can set the Reminder date, based on this date you will get an email notification.

#### Below the screenshot of Funnel New Deal form

#### **Funnel New Deal**



#### 3. Funnel List:

Using funnel list form, personnel can see existing funnel deals, edit/update deals as well as export those deals into excel for authorize BU's.

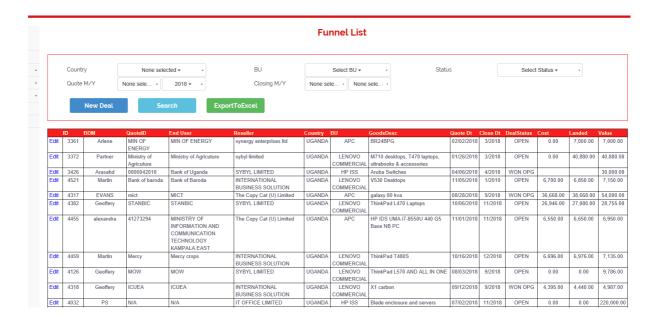
#### To access Funnel List - > Click on Funnel -> Funnel List

Below is screenshot of funnel list form

Country None selected • BU Select BU • Status Select Status • •  Quote M/Y None sele •				Funnel List		
New Deal Search ExportToExcel					Status	Select Status ▼ v
	New Deal	Search	(portToExcel			

#### Steps:

- You can directly click on Search button and you will get list of all funnel deals for which
  you have either FULL ACCESS or READ ONLY ACCESS in funnel setup for specific BU,
  Specific country
- For fast reaching, we recommend you select country, BU and deal status, quote Month & Year, if you are looking for specific deal
- Once you search deals, you can export it into excel using **ExportToExcel** button.



### 4. Edit OR Delete Funnel:

To edit or delete existing funnel deals, first you need to search the funnel deal using FUNNEL LIST (please go through point 3. FUNNEL LIST above for more details on how to search funnel deals)

#### Steps:

• Search the funnel deal, click on <u>Edit</u> button to edit/delete funnel deal. Please see screenshot below.



- You will see complete information of selected deal, please see below screenshot.
- If you want to update funnel, just make changes and click on update to save changes.
- If you want to delete funnel, click on delete button, funnel deal will be deleted and will no longer appear in your list.

#### **Funnel New Deal**

