

FUNNEL

Version

1.0

24th April 2019

red dot
distribution

Contents

Funnel	3
1. Funnel Setup:.....	3
2. Funnel New Deal:	4
3. Funnel List:.....	5
4. Edit OR Delete Funnel:	6

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

red dot distribution | Staff Portal

Menu

- My Profile
- Funnel**
- Funnel Setup
- Funnel New Deal
- Funnel List
- Target & Forecast
- Reports
- Go to Intranet
- Sentrifugo HR
- Power BI

Funnel Setup

Record saved successfully.

Sales Person: Hasnain Tejani

Designation: Business Manager

Country: TANZANIA

Save Cancel

BU	Access
APC	READ ONLY
CISCO	NO ACCESS
DELL COMMERCIAL	NO ACCESS
DELL CONSUMER	NO ACCESS
DIGILINK	NO ACCESS
EPSON	FULL ACCESS
HIKVISION	FULL ACCESS
HP CONSUMABLES	NO ACCESS
HP IPG	NO ACCESS
HP ISS	NO ACCESS
HP PSG	NO ACCESS
KINGSONS	NO ACCESS
KINGSTON	NO ACCESS
LENOVO COMMERCIAL	NO ACCESS
LENOVO CONSUMER	NO ACCESS
LOGITECH	NO ACCESS
MS ESD	NO ACCESS
MS FG	NO ACCESS
MS OEM	NO ACCESS

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

Country	--SELECT--	Customer	Select Customer	Quote ID	
BU	--SELECT--			Quote Date	4/24/2019
BDM	Enter BDM	End User	Enter EndUser	Cost	Enter Cost
Goods Descr	Enter Goods Description			Landed	Enter Landed
Remark 1	Enter Remark			Margin %	Enter Margin %
Remark 2	Enter Remark			Margin \$	Enter Margin \$
Remark 3	Enter Remark			Sell Amount	Enter Sell Amount
Created By	jimmiraj	Updated By		Status	OPEN
Created Date	04/24/2019	Updated Date		Closing Date	mm/dd/yyyy
		Next Reminder On	mm/dd/yyyy	Order Date	mm/dd/yyyy
				Invoice Date	mm/dd/yyyy

Save

Delete

Go To List

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... ▾

None sele... ▾

Closing M/Y

None sele... ▾

None sele... ▾

New Deal

Search

ExportToExcel

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.

Funnel List

Country None selected ▾

Quote M/Y None sele... ▾ 2018 ▾

BU Select BU ▾

Closing M/Y None sele... ▾ None sele... ▾

Status Select Status ▾

New Deal
Search
ExportToExcel

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 [Edit](#) button to edit/delete funnel deal. Please see screenshot below.

	ID	BDM	QuoteID	End User	Reseller	Country	BU	GoodsDesc	Quote Dt	Close Dt	DealStatus
Edit	3361	Arlene	MIN OF ENERGY	MIN OF ENERGY	synergy enterprises ltd	UGANDA	APC	BR24BPG	02/02/2018	3/2018	OPEN
Edit	3372	Partner	Ministry of Agriculture	Ministry of Agriculture	sybyl limited	UGANDA	LENOVO COMMERCIAL	M710 desktops, T470 laptops, ultrabooks & accessories	01/26/2018	3/2018	OPEN

- 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

Country	UGANDA	Customer	synergy enterprises ltd	Quote ID	MIN OF ENERGY
BU	APC			Quote Date	2/2/2018
BDM	Arlene	End User	MIN OF ENERGY	Cost	0.00
Goods Descr	BR24BPG			Landed	7000.00
Remark 1	NA			Margin %	Enter Margin %
Remark 2	Enter Remark			Margin \$	0.00
Remark 3	Enter Remark			Sell Amount	7000.00
Created By	rachael	Updated By	jimmiraj	Status	OPEN
Created Date	03/05/2018	Updated Date	04/18/2019	Closing Date	3/1/2018
		Next Reminder On	1/1/1900	Order Date	1/1/1999
				Invoice Date	mm/dd/yyyy

UpdateDeleteGo To List