Sales software

Add Screen

1. Existing customer – Industry type to auto appear as per first time updation
2. Type of supply – to mention “only for packing”
3. Volume potential – has to be all four services separately as per below template

Volume potential

Revenue potential

Business potential

1. To have the above format for all four verticals as in one sales call, all the four vertical requirements may be there for a customer
2. Joint call participant name required and a report to be generated for joint calls alone with details
3. To have further update after “Submit” – edit option to be available from “Prospective customer” only and prior fields to be non-editable
4. Approver name to be moved next to Rate approval
5. To Add – SOW, SOP, Customer rate approval, T & I – to the list of KYC and contract
6. A check list to be extracted after updating the status of above documents and to take print of the same to get signature of sales staff and product DGM
7. Add/update screen – in sales comments – to move “Target till quote” one step above and to add one more criteria – “Till business”
8. Compliments / Complaints – to open for all cases
9. Comments – to be made mandatory
10. User level to have Super User – Edit / Super user – View

**Reports:**

1. Color code:

New customer business won – Green

New customer business not won – RED

New customer – quotes given – Yellow

Existing customer addl business won – Blue

Existing customer addl business not won – PINK

Existing customer quotes sent – Orange

1. To have only list of staffs provided with login for this software to appear in sales person wise search in reports
2. Sales person to be renamed as “Staff” as non-sales person also can be involved in meeting the customer
3. **Sales person-wise report – Power BI**
4. Staff name / designation to appear on top of the report instead of bottom
5. Purpose of call and other headings – font size to be bigger and these parameters can be spread thru entire width of the page
6. Single page layout with all details per sales person and not three pages
7. Productivity and performance report to be sales person wise and not for all combined
8. Productivity and performance to be defined on top of the report as quotes divided by number of sales calls and business won divided by number of quotes sent
9. All these reports also to be for last 4 weeks

**TO ADD - fresh requirement**

1. Minutes of sales meeting to be recorded
2. Standard points to be discussed in sales meeting to be included
3. Date of sales meeting and action points against each meeting to be recorded
4. Attendees of sales meeting to be recorded and report to be generated with absentees list