* **PROCUREMENT**
* **SALES**
* **MARKETING**

**USERS:**

* **SUPER ADMIN**
* **SALES MANGER**
* **SALES REP**
* **MARKETING MANAGER**
* **MARKETER**
* **suppliers**

**SALES PANEL:**

**Add client:**

Name- website – industry - Address Line 1- Address Line 2 – City – Post code – Country - Main Telephone – Secondary Telephone - Main Email Address  
  
**Add Contact:**

First Name- Last Name – Job title - Address Line 1- Address Line 2 – City – Post code – Country - Work Telephone – Mobile Telephone - Email Address

(dropdown)Status: st1 – st2 – st3 – etc... ERASE THIS !!

(dropdown)Prefix: Mr. – Mrs. – Dr – Miss – Prof – Eng.

Social Profiles

Contact tags (Enter tag and add) (if exist then select)

Client: Type to assign Client

**Add OPP:**  
Name of OPP:

Description of Opp NEW !!!!!

Size of OPP $: (Amount set to SAR Automatically and can be changed) ???????????

Date of OPP: ( Date set to current submitting date and time Automatically and can be change)

Est. Closing Date:

Client : ( Select from all existed clients, can select one or more)

Contacts ( Select one or more contact from the chosen clients above only)

Status of OPP : ( a dropdown of all the status that will be provided to you ) ؟؟؟؟؟؟؟؟؟؟؟

Source of OPP : (Select : Direct – Marketing – Other ) ( if Other then write text )

Percentage : ( Will Show Next to the OPP name after submitting the OPP and it will be connected to the Statue of the OPP )

Reassign OPP ( Select another rep or Manager) ( this option for Managers only ) **OWNERITY ?????????????????????????? change ownerity to new user**

Request a reassign ( if clicked then write a text of the request then send then the manager will be notified ) ( this option for reps only)

Last Update : ( will show any update in the OPP page with date and time )

EXAMPLE: Razan Changed the Statue from st1 to st2 Date: 30 Sep 2022 5:26pm

Bader created OPP#1726 Date: 29 Sep 2022 2:46pm

\*\*\* on view opp show opportunity owner input which is the auth user logged name \*\*\*

\*\*\* all opportunities for each created user show only and when opp reassing to another sales it disappeasrs from him to another one \*\*\*

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**Sales Dashboard:**  
1- Box or Column to Show the Sales in each Quarter:  
Q1 = $$$  
Q2 = $$

Q3 = $$$$

Q4= $$$  
2 - Box or Column to Show the OPPs With Percentage   
OPP name – OPP Assigned to – Statue – Percentage of Completion   
EXAMPLE : KACST National Day Event- Assigned to Fahad – Qou Sent -Last Update Date- 60% STC employees Gathering - Assigned to Mohammed – Negotiation -Last Update Date – 50%   
 Alju Booth Production - Assigned to Bader – Lost - Last Update Date – 0%   
(the percentage is connected to the statue of the OPP )  
  
3 - Box or Column to Show the Current OPPs for each Sale rep

( Sales Managers Will see every OPPs Assigned to them or one of their Sales rep )  
( Sales rep Will see OPPs Assigned to them only)  
  
4- Box or Column to Show Sent Leads from Marketing   
( Marketing Department Will be able to send Leads to specific Sales rep or Mangers)  
(The Sales will be able to get notified if received a Lead )  
the lead box Notification will show :   
Lead Id – Lead name – Assigned to you by   
Accept – Reject  
( Sales rep can see more info by clicking the id or name of the lead and be redirected to the lead page which will be in the Marketing section)  
( if Accept then Lead will be a OPP, if Reject then Select or Write text of rejection)

( Sales Managers Can reassign OPPs to Other Managers or reps )

**MARKETING PANEL:**

Add Client + Add Contact (the same as the Sales department)

**Add Lead:**

Lead Name:

Client of Lead:

Contact of Lead:

Date of Lead: (Date set to current submitting date and time Automatically and can be change)

Status of Lead : ( a dropdown: Lost - Cold – Warm – Lead - Assigned)

Source of Lead : (Select : Social Media – Email Marketing – Tele Marketing – Public Relations - Other ) ( Always Write a text after select any )

Percentage : ( Will Show Next to the Lead name after submitting the Lead and it will be connected to the Statue of the Lead )

**Reassign Lead ( Select another Marketer or Manager) ( this option for Managers only ) ??????**

Request a reassign ( if clicked then write a text of the request then send then the manager will be notified ) ( this option for Marketers only)

Sale rep ( will show after assigning the Lead to a Sale rep)

Last Update : ( will show any update in the Lead page with date and time )

EXAMPLE: Razan Changed the Statue from st1 to st2 Date: 30 Sep 2022 5:26pm

Zahra created Lead#1936 Date: 29 Sep 2022 2:46pm  
  
**Assign Leads:**

in the Assign Leads Page Marketing Managers will be able to see all Leads and will be able to filter by statue or source or date or percentage or Marketer or Client or Contact and will be able to search by name   
in the Assign Leads page Marketing Managers will be able to Assign Leads to Sales rep or Manager if the statue of the Lead set to (Lead) only.   
(After Lead Assign the Marketing Manager will be notified if the Sales rep Accept or Reject or if the Lead reassigned to other Sale rep)   
( if Lead Become OPP Marketing Managers Will be able to see the new ID and Page of the OPP to follow-up with the Sales rep ) ( Marketing Managers can assign Marketers to follow-up)  
(Marketers Will see their Leads only in the Assign Leads Page and if the Lead is assigned or not but won’t be able to assign Leads)  
(Marketers will see any follow-up assigned to them and will be able to contact Sales rep or leave note for them)   
  
**Marketing Dashboard**:

* Box or Column to Show Stats of Leads Source
* Box or Column to Show Stats of Marketers Leads and Statue
* Box or Column to Show Notifications from Sales Department
* Box or Column to Show Last Social Media activity of all contacts
* Box or Column to Show Tasks and Notes for every Marketer