

Sales Management Manual

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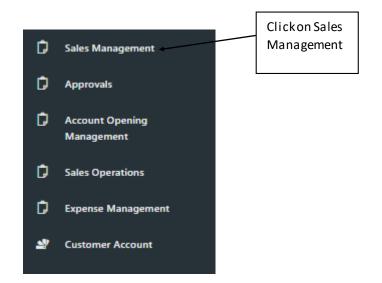
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1.0 Sales Management

1.1 Create New Sales Leads

Click on Sales Management-> Sales Leads



The system displays the available Sales Management Page that have been setup

Clickon	les Management					
the New Sales	ies Lead:					
Leads		<u> </u>	A s			
		New Sales Lead	My Sales Leads			
	Sales Opportunity					
		+	Û			
		New Sales Opportunity	My Opportunities			
	Sales Requirement					
[Requirements - Pending Approval				

Click on the New Sales Leads shown below to create new Sales Leads

Sales Lead - Create Provide required information	
♠ Home / Sales Management / Sales Lead	Actions $^{\vee}$
New Sales Lead	
ENTER YOUR INFORMATION	
Title :	Name:
Enter Title	Enter Sales Lead Name
Email Address :	Telephone :
Enter Email Address	Enter Telephone Number
	+234-999-999-9999
Address	Narration
Enter Address	Enter Narration or Notes
Lead Source :	Upload profile image
Please Select	No file selected Choose File
	Accepted formats: gif, png, jpg. Max file size 2Mb
	Activate Windows Go to Settings to ac Submit form

Enter the required information and click on submit

Sales Lead - Create Provide required information		
Home / Sales Management / Sales Lead	Actions $$	
New Sales Lead		
ENTER YOUR INFORMATION		
Title :	Name :	
MR	Mike Adenuga	
Email Address :	Telephone :	
mikeadenuga12@gmail.com	08052222444	
	+234-999-999-9999	Clickon
Address	Narration	Submit
Adenuga close banana island	nice	
Lead Source :	Upload profile image	Form
Linked In	No file selected Choose File	
	Accepted formats: gif, png. jpg. Max file size 2Mb	

The system display the data on the data grid as shown below

	Sales Leads - List View Records									
🕱 Home	/ Sales / Leads List						Actions \vee			
Sales Lead	Sales Leads Create New Sales Lead									
~	Information - Record added succ	essfully !					×			
Filter: T	ype to filter Q						Show: 10 Y			
^	Name 🗘	Designation \$	Email 0	Telephone \Diamond	Last Modified	Status 🗘	Actions \Diamond			
	Awolowo	MR	awolowo12@gmail.com	07044545467	2020-07- 28	Active	≡·			
	Oluwanishola	MR	oluwanishola@gmail.com	07077788881	2020-07- 27	Active	≡.			
	Mike Adenuga	MR	mikeadenuga12@gmail.com	08052222444	2020-07- 28	Active	≡-			

1.2 Updating Sales Leads Record

Click on the "Action" icon on the record you want to update

Sales View Re	Leads - List ecords					•
🕱 Home ,	/ Sales / Leads List					Actions 🗸
Sales Leads	nformation - Record added succ					Create New Sales Lead
	pe to filter Q	essiony :				Show:
Filter. 1y	pe to inter					Clickon Edit
^	Name 0	Designation \$	Email \Diamond	Telephone 🗘	Last Modified	View Record
	Awolowo	MR	awolowo12@gmail.com	07044545467	2020-07- 28	Edit Record
	Oluwanishola	MR	oluwanishola@gmail.com	07077788881	2020-07- 27	、 置 に Create Corporate Account .
	Mike Adenuga	MR	mikeadenuga12@gmail.com	08052222444	2020-07- 28	Active

The system provide you with an update form

Sales Lead - Create

Home / Sales / Sales Lead	🐖 Support
ENTER YOUR INFORMATION	
Title :	Name :
MR	Mike Adenuga
Email Address :	Telephone :
mikeadenuga12@gmail.com	08052222444
	+234-999-999-9999
Address	Narration
Adenuga close banana island	nice
Lead Source :	Upload profile image
Linked In ×	No file selected Choose File
	Accepted formats: gif, png, jpg. Max file size 2Mb
	Activate Windo

Enter the necessary information and click on Submit Form.

Sales Lead - Create		
Home / Sales / Sales Lead		Support
ENTER YOUR INFORMATION		
Title : MR	Name : Mike Adenuga	
Email Address : mikeadenuga12@gmail.com	Telephone : 08052222444	
	+234-999-9999	
Address Adenuga Close Banana Island Lagos Nigeria	Narration nice	Clickon the Submit Form
Lead Source :	Upload profile image	button
Linked In	No file selected Accepted formats: gif, png, jpg. Max file size 2Mb	hoose File
	Activate Windows	form 🦼

The system shows the updated record on the Sales Leads data grid (shown below)

	Sales Leads - List View Records									
😭 Home	/ Sales / Leads List						Actions 🗸			
Sales Lead	Sales Leads Create New Sales Lead									
~	Information - Record updated su	iccessfully !					×			
Filter: T	ype to filter Q						Show: 10 Y			
^	Name û	Designation \Diamond	Email \Diamond	Telephone 🗘	Last Modified	Status 🗘	Actions \Diamond			
	Awolowo	MR	awolowo12@gmail.com	07044545467	2020-07- 28	Active	≡-			
	Oluwanishola	MR	oluwanishola@gmail.com	07077788881	2020-07- 27	Active	≡-			
	Mike Adenuga	MR	mikeadenuga12@gmail.com	08052222444	2020-07- 28	Active	≡-			

1.3 View Sales Leads record details

In order to view the records, click on the icon on the data row that you want to view and click "view records" as shown bellow

Home	/ Sales / Leads List						Actions	~
ales Leads	5					C.	Create New Sales Lead	
~ 1	nformation - Record updated su	ccessfully !					×]
iter: Ty	/pe to filter Q						Show: 10 Y	
^	Name û	Designation 🗘	Email \Diamond	Telephone $\hat{~}$	Last Modified	Status 🗘	Actions	0
	Awolowo	MR	awolowo12@gmail.com	07044545467	2020-07- 28	Active	≡-	
	Oluwanishola	MR	oluwanishola@gmail.com	07077788881	2020-07- 27	Active	≡-	Clickonthe
	Mike Adenuga	MR	mikeadenuga12@gmail.com	08052222444	2020-07- 28	Active		viewrecord
owing 21	to 23 of 23 entries					Edit Record Create Sales	Opportunity	
						ctivetectorio	yatestcount <u>tivat</u> e Windows.	

The system display the view of the record- shown bellow.

		Mike	Adenuga			
			\mathbf{i}			
		a 08052222444 Q	mikeadenuga12@gmail.co			
Clickto Create		Created On : 7/28/	/2020 Status : Active			
New Sales Opportunity	E Activity Schedule 22 🔅 Pro	file				
	Sales Opportunity					
	You have 0 sales opportunit	v from this lead				
	Create New Sales Opportunity					≡ ~
	Create New Sales Opportunity					= `
			X			
		8 08052222444 Q	mikeadenuga12@gmail.com			
			2020 Status : Active			
	New Sales Opportunity					
	ENTER YOUR INFORMATION					
	Create New Customer Account 🛛 😓					
	* Customer Acount :	* Opportunity Type:		* Transaction Type		
	Please Select	 Please Select 	~	Please Select		~
	* Sales Opportunity :			* Expected Amount		
	Enter Sales Opportunity			Enter Sales Exp	ected Amount	
	* Commencement Date (MM/DD/YYYY) :	* Expected Closed Date (MM/DD/YYYY) :	* Currency :		Purchase Time Frame:	
	Enter Commencement Date	Enter Expected Closed Date	Please Select	~	Please Select	~

You can as well view your Opportunity and also create a new Sales Opportunity through this page shown bellow.

Enter the required information and click on the Create Opportunity

Activate Windows to Settings Back to List 📫

Enter your description or notes here

Description / Notes :

	1 08055222444 Q Created On : 7/	mikeadenuga12@gmail.cc 28/2020 Status : Active	om			
New Sales Opportunity						
ENTER YOUR INFORMATION						
Create New Customer Account 🛛 😡						
* Customer Acount :	* Opportunity Type:		* Transaction Typ	e:		
DevCoy Limited	✓ Cold Opportunity	~	New Business		~	
* Sales Opportunity :			* Expected Amou	int:		
footwears			100,000			
* Commencement Date (MM/DD/YYYY) :	* Expected Closed Date (MM/DD/YYYY) :	* Currency :		Purchase Time Frame:		
07/28/2020	08/04/2020	Naira	~	Open	~	
Description / Notes :					C	lickonthe
					C	reate
Enter your description or notes here					0	pportunity
						- ,
		1		Activate Windo		
				Go to Settings to act Back to List	ivate Windows. Inte Opportunity =+	

The system simply indicate that the Customer Account is successfully created this also entails the customer account name as well

	- TOTAL MESSAGES	×	TOTAL SALES EXPENSES			CASES	Ø	SALES ACTIVITIES
	Sales Opportunity Managem	ent				Select an Action	Y Change Sales Op	portunity Status 🗡
	Initiate		2 Qualify	Que	te	4 Negotiate		- 5 Close
Clickon Manage Custome Account	Customer Account	: Account - View Accoun				nt created successfully! nt Name : DevCoy Limited .		
	Sales Leads							
	Sales Opportunity						Activate Windo Go to Settings to ad	ctivate Windows.

The system shows the Account record on the data grid (shown below)

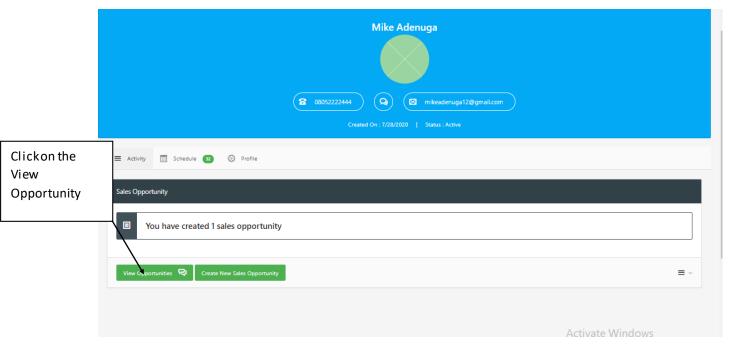
evCoy Limited								
Home / Setup / Cu	ustomer Account							Acti
Activity 🛄 Sc	:hedule 💶 🔅 Cu	ustomer Information						
_								
Sales Opportunity								
Filter: Type to filter	Q						S	Show: 10
Type to filter	Q						S	Show: 10
Filter: Type to filter Opportunity ^	Q Type û	Expected Start Date	Expected End Date 🗘	Expected Amount 🗘	Actual Amount	Actual End Date 🗘	Status 🗘	
		Expected Start Date $\hat{\downarrow}$ 07/28/2020	Expected End Date 0	Expected Amount 🗘		Actual End Date 🗘		
Opportunity ^	Type 🗘				Amount	Actual End Date 🗘	Status 🗘	Actions
Opportunity ^	Type 🗘	07/28/2020	8/4/2020 12:00:00 AM	100000	Amount 0	Actual End Date 🗘	Status 🗘 Pending	Actions =-
Opportunity ^ footwears Gas	Type 🗘	07/28/2020	8/4/2020 12:00:00 AM 8/1/2020 12:00:00 AM	100000	Amount 0 0	Actual End Date 🗘	Status 🗘 Pending Pending	Actions

Click on the "Action" icon on the record to view Opportunity

Home / Setup / C	ustomer Account							Action	ns
Activity 🗂 S	chedule 32 🛞 Cu	ustomer Information						_	
									Clickon
ales Opportunity									View
ilter: Type to filter.									Opportun
	Q,						:	Show: 10	
Opportunity ^	Type 0	Expected Start Date 🗘	Expected End Date 🛛 🇘	Expected Amount 🗘	Actual Amount	Actual End Date 🗘	Status 🗘		
		Expected Start Date 0	Expected End Date 0	Expected Amount 🗘		Actual End Date 🗘		Show: 10	
Opportunity ^	Туре 🗘	-			Amount	Actual End Date 0	Status 🗘	Show: 10 Actions 0 E-	
Opportunity ^	Type 🗘	07/28/2020	8/4/2020 12:00:00 AM	100000	Amount 0	Actual End Date 0	Status 🗘 Pending	Show: 10 Actions 0 E-	
Opportunity ^ footwears Gas	Type Cold Opportunity Warm Opportunity	07/28/2020	8/4/2020 12:00:00 AM 8/1/2020 12:00:00 AM	40000	Amount 0 0	Actual End Date 0	Status 0 Pending View Oppo	Show: 10 Actions 0 E- ortunity	

Viewing the Opportunity takes you back to Customer Account home page

		S	ales Opportunity : footwe	ars	
	Expected Amo	ount : 100,000.00	istomer Account : DevCoy Limited	Expected Close Date : Tuesday, 04	August 2020
	Created Or	: 7/28/2020 Sales Opportunity S	itatus : Pending Sales Lead : Mike Aden	uga Sales Opportunity No : S/2020/7/209	35397
O TOTAL MESSAGES	Q	0.00 TOTAL SALES EXPENSES	ð 🗄	0 CASES	0 SALES ACTIVITIES
Sales Opportunit	ty Management			Select an Action 💙	Change Sales Opportunity Status 💙
N N	(J) hitiate	2 Qualify	3) Quote	4 Negotiate	5 Close
Action:	s				
Manage Sales Leads	Account ds age Sales Lead - View Account		Sales Lead add		This indicate that the Sales Leads was added successfully



The system display the view of the record- shown bellow.

Viewing the Opportunity takes you back to Customer Account home page

	Image: Created On : 7/28/2020 Status : Active	
I	Sales Opportunities	
	Opportunity Topic: footwears	Deal Status : Pending
	Expected Amount : 100,000.00 Expected Closed Date : Tuesday, 04 August 2020	.
Clickon the View	Account : DevCoy Limited Opportunity Type : Cold Opportunity Currency : Naira Commencement Date : 07/28/2020 Purchase Time-Frame : Open	View Activities
Opportunity	View Opportunity	

The system provide you details about the sales Opportunity

It indicate the Sales Opportunity was created successfully, the Total Expected Amount and sales expected close date

	Initiate	2 Qualify	3 Quote	4 Negotiate	5 Close
Clickon Sales	Actions Customer Account				
Opportunity	Sales Leads Sale: Opportunity Manage sales opportunity - View	Opportunity	Sale Opportunity	created successfully!	
			Total Expected An Sales is expected t	rount : 100000 . to be closed on 8/4/2020 12:00:00 AM .	
				Acti Go te	vate Windows ● Previous Settings to activate Whent ♥

The system display the view record of Sales Opportunity - shown below

(Expected Amount : 100,000.00 Q Customer Account : DevCoy Limited Expected Close Date : Tuesday, 04 August 2020 Created On : 7/28/2020 Sales Opportunity Status : Pending
ale Opportunity Inform	ation Commencement Date :
lame :	
footwears	07/28/2020
Expected Closed Date :	Expected Amount :
Expected Closed Date : 8/4/2020 12:00:00 AM	Expected Amount : 100000
-	
-	
8/4/2020 12:00:00 AM	100000
8/4/2020 12:00:00 AM Dpportunity Type :	Time-frame :

1.4 Add Sales Requirement

Click on view Sales Requirement ->Add Sales Requirement

	0 TOTAL MESSAGES	Q	0.00 Total sales expenses	Ĉ	Ł	0 cases	প্ত	0 Sales activities	
	Sales Opportunity Management					Select an Ac	tion Y Change Si	ales Opportunity Status 🗸 🗸	
	Initiate		Qualify	3 Que		4 Negotiate	that the cus	in red in the gr stomer Require ending submiss	ement form
Clickon viev Sales Requiremen	Sales Requirements	quirements			Know Your Customer	Form is pending submission.			
					Office Verification is p	pending submission.			
	Business Value Propositio	n					Activate W	indows	

Once you click on the View Sales Requirement system display the view of the record- shown below.

Under Know Your Customer Form and office verification click on Submit Requirement

	Opportunity : footwears C Expected Amount : 100,000.00 C Customer Account : C reated On : 7/28/2020 S ales Opportunity Status : Pending S ales Opportunity Status : Pending		
Sales Requirements		Back to Sales Qualification	Clickon the submit
Requirement :		Result : Pending	Requirement
Know Your Customer Form			/
	Status : Pending Submission Is Mandatory : Yes	Submit Requirement	
Requirement :		Result : Pending	/
Office Verification			
	Status : Pending Submission Is Mandatory : No	Submit Requirement	

Enter the necessary information and click on the Submit Feedback->Know Your Customer Account

	Expected Amount : 100,000. Created On : 7/28/2020	00 Q Custor	es Opportunity : footv ner Account : DevCoy Limited s: Pending Sales Lead : Mike Ad	Expected Close Date		
Sales Requirements - Updat	e					
ENTER YOUR INFORMATION						
Requirement :						
Know Your Customer Form	1					
Outcome/Feedback :						
TEST						Clickonth
						Submit
pload Image/Document						Feedback
No file selected					Choose File	
					Back to List 💼 s Activate Windo	ubmit Feedback =+ W/S

Enter the necessary information and click on the Submit Feedback->Office Verification

		Sales Opportunity : footv	vears		
	Expected Amount : 100,000.00	Q Customer Account : DevCoy Limited	Expected Close Date : Tuesday, 04 August 20	20	
	Created On : 7/28/2020 Sales	Opportunity Status : Pending Sales Lead : Mike Ac	lenuga Sales Opportunity No : 5/2020/7/20935397		
Sales Requirements - Updat	e				
ENTER YOUR INFORMATION					
Requirement :					
Office Verification					
* Outcome/Feedback :					Clickon the
TEST					Submit
					Feedback
Upload Image/Document				/	1
No file selected			Choose File		
			Back to List	e Windows Ings to <mark>a Submit Feedback o #.t</mark> .	

The system display the Sales Requirement record which indicate result pending -shown below.

Opportunity : footwears Image: Colspan="2">Content: Colspan="2">Content: Content: Conten	Clickon back to Sales Qualification
Created On : 7/28/2020 Sales Opportunity Status : Pending Sales Lead : Mike Adenuga Sales Opportunity No : 5/2020/7/20935397 Sales Requirements Back to Sales Qualifi	cation
Requirement : Result : Per	nding
Status : Pending Approval Is Mandatory : Yes	
Requirement : Result : Per Office Verification	nding
Status : Pending Approval Is Mandatory : No	

1.5 Business Value Proposition

Click on the Business Sales value Proposition ->Create Sales value proposition

	Initiate	Qualify	3 Quote	4 Negotiate	5 Close
ickon ew Sales	E Actions				
lue oposition	Sales Requirements Business Value Proposition				
	Crests Sales Value Prop	petion	Sales Business val	lue proposition has not been created.	
	Decision Makers				
	Competitor Management				ivate Windows o Settings to activate Windows.

Once you click on the Sales value proposition display the view of the record- shown below.

Sales Opportunity : footwears Image: Colspan="2">Q Customer Account : DevCoy Limited Expected Close Date : Created On : 7/28/2020 Sales Opportunity Status : Pending Sales Lead : Mike Adenuga Sales Opportunity No :	
Value Proposition	
ENTER YOUR INFORMATION F Enter value proposition to the client :	Click on the proceed
Enter your Value Proposition here	
Back to List 💼	

Enter the necessary information and click on proceed

	Created On : 7/28/2020 Sales Opportunity Status : Pending Sales Lead : Mike Adenuga Sales Opportunity No :	
Value Proposition		ļ
ENTER YOUR INFORMATION * Enter value proposition to the client :		Click or procee
presentation		/

Click on add Document to proceed

	Sales Opportunity : footwears Call Expected Amount : 100000 Customer Account : Call Expected Close Date : 8/4/2020 12:00:00 AM Created On : 7/28/2020 Sales Opportunity Status : Pending Sales Lead : Mike Adenuga Sales Opportunity No : 5/2020/7/20935397
Click on add document	Value Proposition - Documentation Sales Value Proposition : presentation
	SDINIT OFFERS/QUOTATIONS/PRESENTATION SLIDES Add Document

Sales Opportunity : footwears Comparison Q Customer Account : DevCoy Limited Expected Close Date : 8/4/2020 12:00:00 AM Created On : 7/28/2020 Sales Opportunity Status : Pending Sales Lead : Mike Adenuga Sales Opportunity No : S/2020/7/20935397	
Value Proposition - Documentation Sales Value Proposition : presentation	
SUBMIT OFFERS/QUOTATIONS/PRESENTATION SLIDES Document Title file	Click on save document
Upload Image/Document GNXG3809JPG Choose File Back to List 💼 Save Document	

Enter the necessary information and click on save document

The system indicate the Sales value proposition document as been added -as it is shown below

	Sales Opportunity : footwears		Click on back to sales requirement
	Created On : 7/28/2020 Sales Opportunity Status : Pending Sales Lead : Mike Adenuga Sales Opportunity Status : Pending	ate : 8/4/2020 12:00:00 AM	
	Value Proposition - Documentation	Back to Sa	les Qualification
Document	Sales Value Proposition : presentation	Update	
added successfully			
	Add Document		

1.6 Decision Makers

Click on the Decision Makers ->Add Decision Maker

The system displays the Sales Opportunity Management Page that have been setup

Click on the Add Decision Makers shown below to create new Decision Makers

	Sales Opportunity Management			Select an Action 💙	Change Sales Opportunity Status 💙
	Initiate	Qualify	3 Quote	4 Negotiate	5 Close
	E Actions				
	Sales Requirements				
Clickon Add Decision Makers	Business Value Proposition		You can also select from the existing Decision Makers		
	View Decision Makers -	0	while you click on select existing Decision Makers	this sales opportunity.	
	Add Decision Makers	Select Existing Druction Mail	kers		
	Competitor Management				
					tivate Windows to Settings to activate Windows

	ies opportanity : lootifears
Expected Amount : 100000 Q Cust	tomer Account : DevCoy Limited Expected Close Date : 8/4/2020 12:00:00 AM
Crosted On - 7/39/2020 L. Saler Opportunity Str	stus : Pending Sales Lead : Mike Adenuga Sales Opportunity No : S/2020/7/20935397
Created On . //20/2020 Trains Opportunity sta	nus, Penuing Jales Leau, mike nuelinga Jales Opponuling no. 3/2/2////20933397
Sales Opportunity - Decision Makers	
sales Opportunity - Decision Makers	
ENTER YOUR INFORMATION	
* Title :	* Full Name:
Please Select	Y Enter Full Name
* Role :	* Designation/Position :
Please Select	Enter Designation/Position
Email :	* Contact Phone :
Enter Email Address	Enter Contact Phone
Date of Birth (MM/DD/YYYY) :	
Enter Date of Birth	
Description :	
Enter your description here	
	Activate Windows
	Go to Settings to activate Windows.
Back to List 💼	Submit 🚀

Enter the necessary information and click on Submit button

	Sales Opportunity : tootwears	
	 Expected Amount : 100000 Customer Account : DevCoy Limited Expected Close Date : 8/4/2020 12:00:00 AM 	
	Created On : 7/28/2020 Sales Opportunity Status : Pending Sales Lead : Mike Adenuga Sales Opportunity No : 5/2020/7/20935397	
Sales Opportunity - Decision M	akers	i
ENTER YOUR INFORMATION		1
* Title :	* Full Name:	
Barr. * Role :	Aiyegbusi Yomi Designation/Position :	
Decision Maker	v Manager	
Email :	* Contact Phone :	
aiyegbusiyomi11@gmail.com	08129817443	
1970		Clickonthe
Description :		Submit button
Enter your description here		/
	Activate Windows Go to Settings to activate Windows	
Back to List 💼	Submit 1	

The system display that the Decision Maker is successfully added as shown below

	Initiate	Qualify	3 Quote	4 Negotiate	Close
	Actions				
Clickon View	Sales Requirements				
Decision Makers	Business Value Proposition				
	Decision Makers				
	View Decision Makers - 1		Aiyegbusi Yomi	added as Decision Maker	
	Add Decision Makers	Select Existing Decision Makers			
	Competitor Management				

Then the system provide you details about the Decision Maker

To create New Sales Activities click on Create New Sales Activities button shown bellow

Opportunity : footwears				
Sales Decision Makers Back to Sales Quinfication Decision Maker : Barr. Aiyegbusi Yomi				
Email:aiyegbusiyomi11@gmail.com Phone:08129817443 Date of Birth:1970 Role:Decision Maker				
Create New Sales Activities View Sales Activities				

1.7 Competitor Management

Click on the Competitor Management-> create Competitor Management

The system provides you where you can create competitor information and enter the necessary information needed.

	Sales Opportunity Management			Select an Action 💙	Change Sales Opportunity Status 💉
	Initiate	Qualify	Quote	4 Negotiate	Glose
	E Actions				
Clickon	Sales Requirements				
create competitor	Business Value Proposition				
information	Competitor Management				
	Create Competitor Inf	ormation	There are no comp	petitor information for this sales opportunity.	
				Acti Go to	ivate Windows o Settings toractivate Whentows

Enter the necessary information and click on Submit button

	Sales Opportunity : footwears Expected Amount : 100000 Created On : 7/28/2020 Sales Opportunity Status : Pending Sales Lead : Mike Adenuga Sales Opportunity No :	
Sales Opportunity - Competit	or Information	
ENTER YOUR INFORMATION		
* Competitor :	* Year:	
Please Select	Enter Year under review	
New Competitor		
Stake(%):	Stake - Revenue Amount :	
Enter Stake (%)	Enter Stake - Amount controlled by the Competitor	Clickon
Description :		submit
Enter your description here		button
	Activate Windows	
Back to List 💼	Go to Settings to activity Mississi Submer of	

To create New Sales competitor click on Create New Sales competitor button shown bellow

Opportunity : footwears Customer Account : DevCoy Limited Customer Account	Clickon back to Sales Qualification
Created On: 7/28/2020 Sales Opportunity Status : Pending Sales Lead : Mike Adenuga Sales - Competitor Information Back to Sales Qualification	
Competitor : Slot Limited	
Year: 2018 Stake (%): 60 Stake Amount: 450000	
Create New Sales competitor View Sales Competitors	

1.8 Quotes Management

Click on the Quotes Management-> create New Product Quote

The system provides you where you can create New Product Quote and enter the necessary information needed.

			Created On	: 7/28/2020 Sales Opportun	ity Status : Pending Sa	iles Lead : Mike Adenuga	Sales Opportunity	No : 5/2020/7/20	935397	
	O TOTAL MESSA	GES	Q	0.00 TOTAL SALES EXPENSES	Ď	Ł		0 cases	প্র	0 Sales activities
	Sales Oppo	rtunity Managemer	nt				Select	an Action 💙	Change Sales O	pportunity Status 💙
Clickon create Ne Product	2W	Initiate		Qualify	× ×	Jote	4 Nego			Close
	Quot	Create New 7	_							
								A	Activate Wing	Next +

Sales Opport	Q Quote No : Q/2020/7/M910KCABK
New Sales Quote	
ENTER YOUR INFORMATION	
* Due Date (MM/DD/YYYY) :	Quotation Type :
Enter Scheduled Date	Please Select V
Back 🚔	Initiate Quote 🖋

Enter the necessary information and click on Initiate Quote

	Sales Opportunity : footwears Customer Account : DevCoy Limited Q Q Q Q Q Q Q Q Q Q Q Q Q	Clickon Initiate
		Quote
New Sales Quote		button after
ENTER YOUR INFORMATION		entering the data
* Due Date (MM/DD/YYYY) :	Quotation Type : Price Based	
Back	Initiate Quote 🔺	

Then system provide you a page where you are to enter your Price, Product and Quantity

	Sales Oppo	rtunity : footwears	
New Sales Quote			
ENTER YOUR INFORMATION			
* Product : Please Select	Unit Price : Center Price	* Quantity : Enter Quantity	* Amount : Enter Amount
* Applied Discount :	Final Amount:		
Add New Item 🖋			

Enter the necessary information and click on Add New Item

		tunity : footwears Q Q Quote No : Q/2020/7/M910KCABK		
	New Sales Quote			
Clickon Add New item	ENTER YOUR INFORMATION * Product : Apple Mac Air * Applied Discount : O Add New Item	Unit Price : V 150000 Final Amount: 300000.00	* Quantity : 2	* Amount : 300000

The system provide you details on Product Quote Items you requested for then you can click on complete once you are done

TEMS								
Filter: Type to filter	Q						Show: 1	0 ~
^	Product Name 🗘	Price 🗘	Quantity 🗘	Amount 🗘	Discount	Final Amount 🗘	Actions	÷
	Apple Mac Air	150,000.00	2	300,000.00	0.00	300,000.00	Details Update Remove	
howing 1 to 1 of 1 entries							- 1	Clickon
UBMIT QUOTATION								Complete button
Sub-Total Amount	: 300,000.00 Tax: 15,0	000.00 Total Amoun	nt: 315,000.00					
View Quote 💼							Complete	5

1.9 Requesting for Product Quote Approval

In order to request for Approval click on Manage Product Quote then the system provide you a data in the grid as shown bellow click on the "Action"

0 TOTAL I		0.00 Total sales expenses		o cases) SALES AC
Sales (Opportunity Management			Select an Action 👻 (Change Sales Opportunity Status
	_		(2)	4	5
Clickon Manage	Initiate	Qualify	Quote	Negotiate	Close
Product Quote					
	otes Management				
	Maringe Product Quote	S View Product Quote			
	Create New Service Quote				
	Quote Number : Q/2020/7/2XGH6E Amount : 315,000.00 Status : Pending	ZNL			

The system displays the data on the grid as shown below

(1	Expected Amount : 100,000.00	Q Customer Account : De	ty : footwears evCoy Limited	xpected Close Date : T	uesday, 04 August 202		
		Created On : 7/30/2020 :	Sales Opportunity Status : Pendin	g			
ales Quote						Back to Sales Qualification	
iter: Type to filter	Q					Show: 10 ~	Clickon Request fo
ustomer Account	Sales Opportunity	Sales Quote Number 🗘	Total Amount	Tax 🗘	Final St. Amount	atus 🗘 Actions 🗘	Approval
levCoy Limited	footwears	Q/2020/7/2XGH6E2NL	300,000.00	15,000.00	315,000.00 Pe	anding =-	
howing 1 to 1 of 1 entries						View Record Request for Approval	

Then system indicate that your Product Quote Approval have been sent successfully.

But still showing pending Approval down below which need to be approved by a Junior Role Officer

	Expected Amount : 1		Opportunity : for her Account : DevCoy Limi 7/30/2020 Sales Oppo			Date : Tuesday, 04 August 2020)	
Sales Quote							Back to Sale	es Qualification
 Information - Que 	Information - Quote sent for approval successfully ! X							
Filter: Type to filter Q. Show: 10 *								
Customer Account ^	Sales Opportunity	Sales Quote Number 🛛 🗘	Total Amount 🗘	Tax 🗘	Final Amount	Status	0	Actions 🗘
DevCoy Limited	footwears	Q/2020/7/2XGH6E2NL	300,000.00	15,000.00	315,000.00	Pending Approval - Junior Approva	Role	≡-

2.0 View Product Quote record details

In order to view the records, click on the "Action" icon on the data row that you want to view and click "view records" as shown below

2.1 Product Quotation Approval Pending list

Click on Approval-> Pending Approval

I	Ċ	Sales Management	>	_	Clickon Approvals
I	Ċ	Approvals	>	l	
(Ċ	Account Opening Management	>		
I	Ċ	Sales Operations	•		
I	Ċ	Expense Management	>		
4	2	Customer Account	>		

Junior Approval Role->click on "Action" icon in the grid in order to approve pending Sales Quote

	Submission & Approvals		
	Sales Submission		
	Pending Submission		
Clickon Pending	Sales Requirement Approvals		
Pending Approval	Pending Approval	Approved Requirement	
	Product Quotation Approval		
	ending Approval	Approved Quotation	
	Service Quotation Approval		
	Pending Approval	Approved Quotation	
	Product Discount Approval		
	Pending Approval	Approved Discount	
	Service Discount Approval		Activate Windows
		A CONTRACT OF A CONTRACT.	Activate windows

Then the system displays the data on the grid as shown below

 Home / Transaction / Sales Quotes 							,	lctions ~
Sales Quotation Approval - Pending								
Filter. Type to filter Q							Show:	10 ~
Transaction Date	Due Date 🗘	Sales Quote Number 0	Total Amount	Tax 0	Final Amount	Status	Action	Clickon
2020-07-21	07/22/2020	Q/2020/7/10ZBHQQLW	150,000.00	7,500.00	157,500.00	Pending	=	
7/27/2020	08/01/2020	Q/2020/7/61QKGXDHK	0.00	0.00	0.00	Pending	=	Approv
7/27/2020	08/01/2020	Q/2020/7/C1F0JBPAJ	0.00	0.00	0.00	Pending	=	Record
			300.000.00	15.000.00	315,000.00	Pending	=	
7/29/2020	08/04/2020	Q/2020/7/M910KCABK	000,000.00					

Enter the necessary Approval information then you click on the Approve down below

Sales Quotation - View Details								
VIEW INFORMATION								
Customer Number : C/2020/7/QE0EY339J		stomer Name : levCoy Limited		Sale Opportunity No : 5/2020/7/13682933			Sale Oppor footwears	
Quote No : Q/2020/7/2XGH6E2NL		b-Total :),000.00		Tax : 15,000.00			Total Amor 315,000.00	int :
QUOTE ITEMS								
Filter: Type to filter	٩							Show: 10 ~
^	Product Name	Price 0	Quantity 0	Amount 0	Discount	Final Amount	÷	Actions \Diamond
	Apple Mac Air	150,000.00	2	300,000.00	0.00	300,000.00		Details Update Remove
Showing 1 to 1 of 1 entries								- 1 -
Approval Information								
* Approval Type :								
Please Select			~					
Comments :				_				
Enter your description or notes	here							
				4				tivate Windows to Settings to activate Windows.
			Back to Pending Approval	List 🧰 Approve	≡+			to settings to delivate windows.

Click on the Approve button after entering the necessary details as it shown below

Sales Quotation - View Details									
VIEW INFORMATION									
Customer Number : C/2020/7/QE0EY339J		stomer Name : evCoy Limited		Sale Opportunity No : S/2020/7/13682933			iale Opportun footwears	ity :	
Quote No : Q/2020/7/2XGH6E2NL		9-Total : 0.000.00		Tax : 15,000.00			Total Amount : 15,000.00		
QUOTE ITEMS									
Filter: Type to filter Q.								Show:	10
^ Pro	oduct Name O	Price 0	Quantity 0	Amount 0	Discount	Final Amount	0	Actions	0
	Apple Mac Air	150,000.00	2	300,000.00	0.00	300,000.00		Details Update Remove	
Showing 1 to 1 of 1 entries								-	1
Approval Information					Г		-		
Approval Type :						Clickon			
Approved				•		the			
Comments :				-		Approve			
TEST						button	Activ	(ata) Mindayua	
			Back to Pending Approval	// List 🧰 Approve				vate Windows Settings to activate Win	dows.

Then system provide you Sales Opportunity list which indicate pending and Sales won opportunity

Filter: devcoy	Q								Sho	wc 10 ~
Customer Account	Opportunity No 0	Opportunity 0	Туре 0	Expected Start Date 0	Expected End Date	Expected Amount 0	Actual End Date 0	Actual Amount 0	Status 0	Actions
DevCoy Limited	5/2020/7/06208279	Test Opportunity	Warm Opportunity	07/15/2020	7/31/2020 12:00:00 AM	150000		0	Pending	≡-
DevCoy Limited	5/2020/7/24232466	Gas	Warm Opportunity	07/27/2020	8/1/2020 12:00:00 AM	400000		0	Pending	≡·
DevCoy Limited	5/2020/7/95732261	Gas	Warm Opportunity	07/27/2020	8/1/2020 12:00:00 AM	400000		0	Pending	≡-
DevCoy Limited	5/2020/7/69552623	Gas	Warm Opportunity	07/27/2020	8/1/2020 12:00:00 AM	400000		0	Pending	≡-
DevCoy Limited	5/2020/7/20935397	footwears	Cold Opportunity	07/28/2020	8/4/2020 12:00:00 AM	100000		0	Pending	≡·
DevCoy Limited	5/2020/7/13682933	footwears	Cold Opportunity	07/28/2020	8/4/2020 12:00:00 AM	100000	08/02/2020	315000	Sales Won	≡-
DevCoy Limited	5/2020/8/29730169	footwears	Cold Opportunity	08/01/2020	8/4/2020 12:00:00 AM	300000	08/02/2020	0	Sales Won	≡-

2.2 Junior Approval Role 2



The system provides you submission and Approvals data then you click on Pending Approval under product Quotation Approval

	Submission & Approvals		
	Sales Submission		
Clickon Pending Approval	ding Submission		
Approval	es Requirement Approvals		
	ding Approval	Approved Requirement	
	Product Quotation Approval		
	Pending Approval	Approved Quotation	
	Service Quotation Approval		
	Pending Approval	Approved Quotation	
	Product Discount Approval		
	Pending Approval	Approved Discount	
	Service Discount Approval		
		and the second	Activate Windows

Then the system displays the data on the grid click on "Action" icon to Approve Sales Quotation as shown below

Sales Quotes Approval - Pendir View Records	ng List						o
R Home / Transaction / Sales Quotes							Actions \sim
Sales Quotation Approval - Pending							
Filter: Type to filter Q							Clickon
Transaction Date	Due Date 0	Sales Quote Number \Diamond	Total Amount	Tax 0	Final Amount	Status 0	Approve Record
2020-07-22	07/22/2020	Q/2020/7/FJ4WZ081Y	750,000.00	37,500.00	787,500.00	Pending	≡-
7/30/2020	08/04/2020	Q/2020/7/2XGH6E2NL	300,000.00	15,000.00	315,000.00	Pending	=-
Showing 1 to 2 of 2 entries						C View	

Enter the necessary Approval information then you click on the Approve button down below

Sales Quotation - View Details								
VIEW INFORMATION								
Customer Number : C/2020/7/QE0EY339J		stomer Name : DevCoy Limited		Sale Opportunity No : 5/2020/7/13682933		9	Sale Oppor footwears	
Quote No : Q/2020/7/2XGH6E2NL		b-Total : 0,000.00		Tax : 15,000.00			Total Amou 315,000.00	unt:
QUOTE ITEMS								
Filter: Type to filter	٩							Show: 10 ~
^	Product Name	Price 0	Quantity 0	Amount 0	Discount	Final Amount	0	Actions \Diamond
	Apple Mac Air	150,000.00	2	300,000.00	0.00	300,000.00		Details Update Remove
Showing 1 to 1 of 1 entries								- 1 -
Approval Information								
* Approval Type :								
Please Select			~					
Comments : Enter your description or notes here								
enter your description or notes ner	e							
				1.				tivate Windows to Settings to activate Windows.
			Back to Pending Approval	List 💼 Approve	±+			e een ge to detrate mildons.

Click on the Approve button after entering the necessary details as it shown below

Sales Quotation - View Details									
VIEW INFORMATION									
Customer Number : C/2020/7/QE0EY339J		tomer Name : evCoy Limited		Sale Opportunity No : 5/2020/7/13682933			Sale Opportunity : footwears		
Quote No : Q/2020/7/2XGH6E2NL	Sub-Total : 300,000.00		Tax : 15,000.00			Total Amount : 315,000.00			
QUOTE ITEMS									
Filter: Type to filter Q								:	ihow: 10 ~
^	Product Name	Price 0	Quantity 0	Amount 0	Discount	Final Amount	0	Actions	0
	Apple Mac Air	150,000.00	2	300,000.00	0.00	300,000.00		Details Update Remo	ve
Showing 1 to 1 of 1 entries									← 1 →
Approval Information						ckon the			
Approval Type :						prove			
Approved			~		but				
Comments : TEST					but	lon			
				<i>h</i>			Activate Go to Settin	Windows gs to activate	Windows.
			Back to Pending Approval	List 🧰 Approve	±+				
	S Fame	cted Amount : 100,000.00	Opportu	DevCov Limited	Expected Clo	se Date : Tuesday, 04 August	2020		
				Sales Opportunity Status : P		,			
Sales Quote								Back to S	ales Qualification
Filter: Type to filter	٩							:	how: 10
Customer Account	Sales Opportunity	Sales Quote Number	C Total Amo	unt 0 Tax	ି Fir An	nal Status nount		0	Actions
DevCoy Limited	footwears	Q/2020/7/2XGH6E2NL	300,000.00	15,000.0	0 31	5,000.00 Pending Appro	val - Junior Approval Role	1	=-
Showing 1 to 1 of 1 entries								C View Record	

Then system provide you every Sales Quotation details shown below

Sales Quotation - View Deta VIEW INFORMATION Customer Number : Customer Name : Sale Opportunity No : Sale Opportunity : C/2020/7/QE0EY339J DevCoy Limited 5/2020/7/13682933 footwears Tax : Total Amount : Quote No : Sub-Total : Q/2020/7/2XGH6E2NL 300,000.00 15,000.00 315,000.00 QUOTE ITEMS Q Show: 10 ~ Filter: Type to filter... Product Name Price Quantity Amount Discount Final Amount Actions 2 |Details | Update |Remove | Apple Mac Air 150,000,00 300.000.00 0.00 300,000.00 1 Showing 1 to 1 of 1 entries Approval Information * Approval Type : -- Please Select --Comments : Enter your description or notes here Go to Settings to activate Windows. Back to Pending Approval List 💼 Approve ≡+ Sales Quotation - Details A Home / Transaction / Sales Quotation Actions \sim Quote Back to Sales Qualification Back to Product Quotation [Save 🛱 Print 2269 Elba Lane Paris, France 888-555-2311 Invoice To: Invoice : Q/2020/7/2XGH6E2NL DevCoy Limited Date: Thursday, 30 July 2020 Due date: Tuesday, 04 August 2020 Nigeria 08043535345 se@well.com Price Discount Final Amount Product Name Quantity Amount 2 Apple Mac Air 150,000.00 300,000.00 0.00 300,000.00 Total due Authorized person Subtotal: 300,000.00 Ba Activate Windows Tax Go to Settings to activate Windows. 315,000.00 Total:

2.3 Quotes Management

2.4 Create Service Quote

Click on the Quote Management->Create New Service Quote

The system displays the Sales Management Page that have been setup

Click on the Create New Service Quote shown below to create new Service Quote

	Sales Opportunity Management			Select an Action 💙	Change Sales Opportunity Status 🗡
	Ø		Ø	4	5
	Initiate	Qualify	Quote	Negotiate	Close
Clickon Create New	Quotes Management				
Service	Manage Product Quote	View Product Quote			
	Create New Service Quote				
	Quote Number : Q/2020/7/M910KCAI Amount : 315,000.00 Status : Pending	зк			
					 Previous Next

Enter the necessary information and click on Initiate Quote

Sales Opportunity : footwears Customer Account : DevCoy Limited Q Image: Customer Account : DevCoy Limited	
New Sales Quote ENTER YOUR INFORMATION	Clickon
* Due Date (MM//DD/YYYY) : (8/07/2020	initiate
Back 💼	4

The system provides you where you can create New Service Quote and enter the necessary information needed.

	S	Coy Limited Q Q Quote No : Q. 2020	0.7.XNZK3B3KA	
v Sales Quote				
ENTER YOUR INFORMATION				
Service : Please Select	* Quote Type : Please Select	* Applied Discount :	Final Amount: 0.00	
abour Description :	* Hours/Days :	Rate :	* Amount :	
Enter your description here	Enter Hour/Day	0	0	
	li			

Enter the required information and click on the Add New Item button shown below

		Sales Opport	Inity : footwears Q Quote No : Q_2020_7_XNZK383KA	
I	New Sales Quote			
	ENTER YOUR INFORMATION			
	Service :	* Quote Type :	* Applied Discount :	Final Amount:
	Corporate Deep Cleaning Services V	* Hours/Days :	0 Rate :	16000.00
Clickon Add	Enter your description here	8	20,000	160000
New Item				
	Add New Item 🔺			Activate Windows
				Go to Settings to activate Windows

The system provide you details on Service Quote Items you requested for shown then you can click on complete once you are done

	LABOUR							
	Filter: Type to filter Q							Show: 10 ~
	Service ^	Labour Description 🗘	Hours/Days 🗘	Rate 🗘	Amount 🗘	Discount	Final Amount 🛛 🗘	Actions 🗘
	Corporate Deep Cleaning Services		8	20,000.00	160,000.00	0.00	160,000.00	Details Remove
	Showing 1 to 1 of 1 entries							← 1 →
	MATERIALS							
	Filter: Type to filter Q							Show: 10 Y
	Service ^ Material Des	cription \hat{arphi} Quantity	≎ Price pe	runit 🗘	Amount 🗘	Discount	Total Amount 🛛 🗘	Actions 🗘
			No data	available in table				
	Showing 0 to 0 of 0 entries							← →
Clickon	JBMIT QUOTATION							
complete	JEMIT QUOTATION							
button	Sub-Total Amount : 160,000.00	Tax : 8,000.00 Total Amount :	168,000.00					
							Activate Wi	indows to activate Windows.
	Complete 💼						oo to settings	View Quote 💼

2.4 Requesting for Service Quote Approval

In order to request for Approval click on Manage Service Quote then the system provide you a data in the grid as shown bellow click on the "Action"

Sales Quotes Approval - Pending View Records	g List							۰	
 Home / Transaction / Sales Quotes 							A	ctions \vee	
Sales Quotation Approval - Pending Filter. Type to filter							Show.	10 ~	Clickon the Approve
Transaction Date	Due Date 🗘	Sales Quote Number	\$ Total Amount	Tax 0	Final Amount	Status	Actions		Record
7/29/2020	08/07/2020	Q_2020_7_XNZK3B3KA	160,000.00	8,000.00	168,000.00	Pending	=/		
Showing 1 to 1 of 1 entries							View Record Approve Record	-	

Sales Quotation - View Details						
VIEW INFORMATION						
Customer Number : C/2020/7/QE0EY339J	Customer Name : DevCoy Limited		Sale Opportunity No : S/2020/7/20935397		Sale Op footw	portunity : ears
	Sub-Total : 160,000.00		Tax : 8,000.00		Total A 0.00	mount :
QUOTE ITEMS						
Filter: Type to filter Q.						Show: 10 ~
Service Name	Price 0	Quantity 0	Amount 0	Discount 0	Final Amount	Actions 0
Corporate Deep Cleaning Services	20,000.00	8	160,000.00	0.00	0.00	Details Update Remove
Showing 1 to 1 of 1 entries Approval Information						- 1 -
* Approval Type :						
Please Select		Ý				
Comments : Enter your description or notes here						

Enter the necessary Approve information then click on the Approve button down below

Sales Quotation - View Details						
VIEW INFORMATION						
	Customer Name : DevCoy Limited		Sale Opportunity No : S/2020/7/20935397		Sale Op footw	aportunity : ears
	iub-Total : 160,000.00		Tax : 8,000.00		Total A 0.00	mount :
QUOTE ITEMS						
Filter: Type to filter Q.						Show: 10 Y
Service Name	Price 0	Quantity 0	Amount 0	Discount 0	Final Amount	Actions 0
Corporate Deep Cleaning Services	20,000.00	8	160,000.00	0.00	0.00	Details Update Remove
Showing 1 to 1 of 1 entries Approval Information				Γ		- 1 -
* Approval Type :				Clickon		
Please Select		~		Approv	e	
Comments :				Button		
TEST						
		Back to Pending Approval	List 💼 Apprile =			Activate Windows to to Settings to activate Windows.

2.5 Negotiation Management

Click on Create New Product or Service Negotiation in order negotiate

	0 TOTAL MESSAGES	0.00 TOTAL SALES EDPENSES		0 CASS	0 sales activities
Clickon	les Opportunity Management			Select an Action	~ Change Sales Opportunity Status ~
Create New		⊘			5
Product	Initiate	Qualify	Quote	Negotiate	Close
Negotiation					
	Quot. << Management				
	ESI Create New Product	Negotiation			
	ISI Create New Service N	Negotiation			
					◆ Previous Next ◆

8 a	Sales Opportunity : for istomer Accout : DevCoy Limited Created On : 7/28/2020 Sales Opport	0 Expected Close Date : 8/4/2020 12:00:00 AM
Sales Negotiation - Update		
ENTER YOUR INFORMATION		
Quote Number : Q/2020/7/M910KCABK Amount : 315,000.00		
* Negotiation Date (MM/DD/YYYY) :	Negotiated Amount :	Negotiated Outcome :
Enter Scheduled Date	Enter Negotiated Amount	Please Select V
Feedback :	Attendee	es:
Enter your Feedback here	Enter y	your Attendees here
		Back to Lint 🏙 Submit Reedback 🛤

Enter the required information and click on Submit Feedback

Sales Opportunity : footwears Customer Accout : DevCoy Limited Cented On : 7/28/2020 Sales Opportunity Status : Pending Created On : 7/28/2020 Sales Opportunity Status : Pending								
Sales Negotiation - Update								
ENTER YOUR INFORMATION								
Quote Number : Q/2020/7/M910KCABK Amount : 315,000	.00							
* Negotiation Date (MM/DD/YYYY) :	Negotiated An	nount :		Negotiated Outcome :				
08/01/2020	5000			Negotiation Completed	*			
Feedback :		Attend	ees :					
Enter your Feedback here		Ente	r your Attendees here					
				Backs	o List 💼 Submit Feedback ≣+			

ne system display t	he data d	on the data	a grid as sho	wn below				Clickon Requestf
Sales Quotation - Details								More
View information								Discount
Home / Transaction / Sales Quotation								Actions
Sales Quotation - View Details						Back	to Sales Opportunity Request for more I	Ascount
VIEW INFORMATION								
Customer Number :		stomer Name :		Sale Opportunity No :		Sale Oppo		
C/2020/7/QE0EY339J		levCoy Limited		S/2020/7/20935397		footwear		
Quote No : Q/2020/7/M910KCABK		b-Total :),000.00		Tax : 15,000.00		Total Amo 315,000.00		
QUOTE ITEMS								
Filter: Type to filter Q							Show	10 ~
^ Produ	ict Name 🗘	Price 🗘	Quantity \Diamond	Amount 0	Discount	Final Amount 🗘	Actions	0
App	ole Mac Air	150,000.00	2	300,000.00	0.00	300,000.00	Details Update Remove	
Showing 1 to 1 of 1 entries							+-	1
							8 Back to Sales Opportunity	

Enter the necessary information and click on Submit Discount Request down below

ales Quotation - Discount Request View information				
Home / Transaction / Sales Quotation				Actions \lor
ales Discount Request				
EW INFORMATION				
ustomer Number :	Customer Name :	Sale Opportunity No :	Sale Opportunity :	
C/2020/7/QE0EY339J	DevCoy Limited	S/2020/7/20935397	footwears	
Quote No :	Sub-Total :	Tax :	Total Amount :	
Q/2020/7/M910KCABK	100,000.00	15,000.00	315,000.00	Clickon
NTER YOUR INFORMATION				Submit
Requested Discount (%):		Reason :		Discount
50000		test		
				Request
Back 💼			Submit C	Discount Request 🖪
			Activate Window	VS

The system indicate that the Request for Discount on Product Negotiation was added successfully

		Expected Amount : 100.000.00 Greated On : 7/28/2020 Sales O	Sales Opportunity : footwears Q Customer Account : DevCoy Limited Imited Exp pportunity Status : Pending Sales Lead : Mike Adenuga Sales Sales Sales	ected Close Date : Tuesday, 04 August 2020	
	0 TOTAL MESSAGES	QQ 0.00 TOTAL SALES EXPENSES		0 CAES	0 sales activities
	Sales Opportunity Management	discount added successfully !		Select an Action 💙	Change Sales Opportunity Status ~ ~
Clickon Create New Service	initiate Quotes Management	Quality	Quote	(Ø) Negotiate	Gose
Negotiation	53 Manage Product Nee 53 Greate New Service N	_			te Windows ettings to activate Windows,

	Sales Opportuni Customer Accout: DevCoy Limited Careted Amount	nt :: 100000 Expected Close Date : 8/4/2020 12:00:00 AM
	Created On : 7/28/2020 Sale	les Opportunity Status : Pending
Sales Negotiation - Update		
ENTER YOUR INFORMATION		
Quote Number : Q 2020_7_XNZK3B3KA Amount : 0.00		
* Negotiation Date (MM/DD/YYYY) :	Negotiated Amount :	Negotiated Outcome :
Enter Scheduled Date	Enter Negotiated Amount	Negotiation Completed ~
Feedback :		Attendees :
Enter your Feedback here		Enter your Attendees here
		Backto List 💼 Subrit Feedback 🕪

Enter the required information and click on Submit Feedback

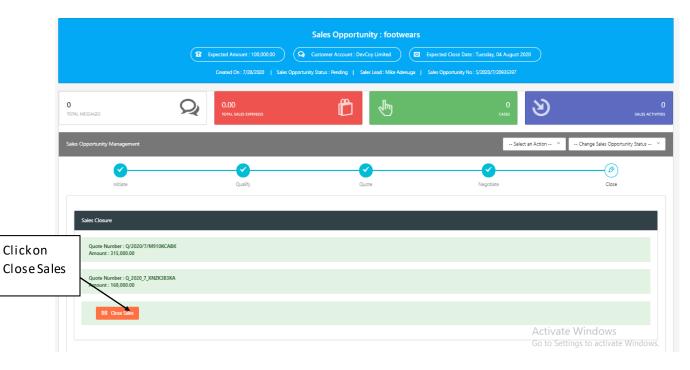
Customer Accout : D	Sales Opportunity : footwears exCoy Limited	# Date : 8/4/2020 12:00:00 AM	
Sales Negotiation - Update DITER YOUR INFORMATION			
Quote Number : Q. 2020_7_XNZK383KA Amount : 0.00 * Negotistion Date (MM/DD/YYYY) : Image: Q01/2020	Negotiated Amount : 5009	Negotiated Outcome : Negotiation Completed	Click on the Submit Feedback
Feedback : Enter your Feedback here	Attendees : Enter your Attendees here	Back to List 💼 S	button

The system indicate that the Request for Discount on Service Negotiation was added successfully down below

		Sales Opportunity : footwears Q Customer Account : DevCoy Limited Expension contunity Status : Pending Sales Lead : Mike Adenuga Sales	cted Close Date : Tuesday, 04 August 2020	
0 TOTAL MESSAGES		t 🖞	0 دمعة کې	0 sales activities
Sales Opportunity Management			Select an Action 💙	Change Sales Opportunity Status ~
Initiate	Qualify	Quote	Negotiate	Close
Quotes Management				
ES Manage Product Nego	otiation			
ESI Manage Service Nego	tiation			
Date : 08/01/2020 Amount : 5,00	00.00 Outcome : Negotiation Completed			
Date : 08/01/2020 Amount : 5,00	00.00 Outcome : Negotiation Completed			e Windows tings to activate Windows,

2.6 Sales Closure

Click on Sales Closure in order to close sales



The system provide you a page where you are to enter necessary information on Sales Closure shown below

	Sales Opportunity : footwears
Sales Closure	Created On: 7/28/2020 Sales Opportunity Status : Pending Sales Laad : Milka Adenuga Sales Opportunity No : 5/2020/7/20935397
ENTER YOUR INFORMATION	
* Closure Status: Please Select	v
* Actual Closed Date (MM/DD/YYYY) : Enter Sales Closure Date	Reference Number : Enter Reference No
Name of Competitor lost to": Name of the competitor	Lost Reason Comments : Enter your description or notes here
	Back to List 🍙 Cose Sales 🖛

Enter the necessary information and click on the Close Sales button

Expected Amount : 100.000.00 Q Customer Account	unity : footwears : footwears : footwears Sales Lead : Mike Adenuge Sales Opportunity No : 5/2020/7/20935397	
Sales Closure ENTER YOUR INFORMATION * Closure Status: Sales Won *	Back to Sales Qualification	Clickon the Close Sales button
* Actual Closed Date (MM/DD/YYY) : (08/01/2020)	Reference Number: UCHHIQ Back to List 📾 Close Sales 🛤	

Then system provide that the sales as been close and it indicate Sales Won in the grid down below

Sales Opportuniti View Records	es - List									٠
🖈 Home / Sales / Op	portunity List									Actions 🕓
Sales Opportunity List										
Filter: devcoy	Q								Sh	ow: 10 ~
Customer Account ^	Opportunity No	Opportunity 0	Туре 🗘	Expected Start Date	Expected End Date	Expected Amount	Actual End Date	Actual Amount	Status 0	Actions
DevCoy Limited	S/2020/7/06208279	Test Opportunity	Warm Opportunity	07/15/2020	7/31/2020 12:00:00 AM	150000		0	Pending	≡.
DevCoy Limited	5/2020/7/24232466	Gas	Warm Opportunity	07/27/2020	8/1/2020 12:00:00 AM	400000		0	Pending	≡-
DevCoy Limited	5/2020/7/95732261	Gas	Warm Opportunity	07/27/2020	8/1/2020 12:00:00 AM	400000		0	Pending	≡-
DevCoy Limited	5/2020/7/69552623	Gas	Warm Opportunity	07/27/2020	8/1/2020 12:00:00 AM	400000		0	Pending	≡-
DevCoy Limited	S/2020/7/20935397	footwears	Cold Opportunity	07/28/2020	8/4/2020 12:00:00 AM	100000		0	Pending	≡-
DevCay Limited	5/2020/7/13682933	footwears	Cold Opportunity	07/28/2020	8/4/2020 12:00:00 AM	100000	08/02/2020	Aহাঞ্জate Wr Go to Settings t	d Server activate V) ≡ - Vindows.
DevCoy Limited	5/2020/8/29730169	footwears	Cold Opportunity	08/01/2020	8/4/2020	300000	08/02/2020	0 (Sales Won	=-

2.7 Sales Approval level 2

Create Sales Opportunity

Enter the necessary information and click on create opportunity

New Sales Opportunity				
ENTER YOUR INFORMATION				
Create New Customer Account 🛛 😓				
* Customer Acount :	* Opportunity Type:		* Transaction Type:	
Teste Nigeria Limited	~ Warm Opportunity		✓ Existing Business	~
* Sales Opportunity :			* Expected Amount:	
Gas			350,000	
* Commencement Date (MM/DD/YYYY) :	* Expected Closed Date (MM/DD/YYYY) :	* Currency :	Purchase Time Frame:	
07/31/2020	08/04/2020	Naira	~ Open	Clickon Create
Description / Notes :				opportunity
Enter your description or notes here				, ,
		1		
			Back to List 🧰 🛛	Treate Opportunity =+

Then we proceed to Sales Quote in order to brief us on how to approve

Sales Oppor	rtunity : Gas	Clickon Initiate Quote after entering the data
ENTER YOUR INFORMATION		
Due Date (MM/DD/YYYY) : (08/04/2020	Quotation Type : Amount Based	·
Back	Initiate Quote	

The system provide you a page where you can choose Product, Quote Item and Quantity

	L Customer Account : Teste Nige	Sales Opportunity : Gas	ABBITATIK	
w Sales Quote				
ENTER YOUR INFORMATION				
* Product :	Quote Item :	Quantity :	* Price :	
Please Select	 Enter Quote Item 	Enter Quantity	Enter Amount	
* Amount :	Description :	* Applied Discount :	Final Amount:	
Enter Amount	Enter your description here			
		1.		
Add New Item 🖪				

Enter the required information and click on the Add New Item button down below

	Sale	es Opportunity : Gas nited Q (Q Quote No : 0/2020/8/66M	283AMZ
New Sales Quote			
Click on the Add New Item button	Quote Item : v black Description : Enter your description here	Quantity : 4 * Applied Discount : 0	* Price : 100.000 Final Amount 400000.00

Then the system indicate that item have been added successfully shown below

ITEM	5									
Filter	Type to filter	Q								Show: 10
	^	Product Name 0	Quote Item 0	Item Description	Quantity 0	Price	Amount 0	Discount 0	Final Amount 0	Actions 0
		Apple Mac Air	black		4	100000	400000	0	400000	Details Remove
lickon backt ales Opportu		25								- 1
	N									
X	Sub-Total Amoun	nt: 400,000.00 Tax: 20,000	0.00 Total Amount : 4	20,000.00						
	\backslash									

2.8 Sales Negotiation Update

Enter the necessary information and click on the Submit feedback button

(Sales Opportunity Customer Accout : Teste Nigeria Limited Created On : &/2/2020 Sales Opport	000 Expected Close Date : 8/4/2020 12:00:00 AM	
Sales Negotiation - Update			
NTER YOUR INFORMATION Quote Number : Q/2020/8/W8MBB1XMK Amount : 735,0	00.00		Click on submit
Negotiation Date (MM/DD/YYYY) :	Negotiated Amount : 400000	Negotiated Outcome : Negotiation Completed	feedback
Feedback : Enter your Feedback here	Attender	s: your Attendees here Back to List	Submit Foodback #+

The system provide you the Sales Quotation details click on Send for Approve shown below

2.9 Approval Stage Officer 1

The system provide you a grid where you can click on the "Action" to approve the Sales Quotation

Home / Transaction / Sale	s Quotes										Act	tions ~
												Click c
es Quotation Approval - Pen	ding											Appro
Type to filter	Q										Show: 10	
saction Date	^ Due	Date C	Sales Quote Number	٥	Total Amount	0 Tax	¢	Final Amount	Status	0	Actions	
0-07-21	07/2	2/2020	Q/2020/7/10ZBHQQL	v	150,000.00	7,500.00		157,500.00	Pending		≡-	
2020	08/0	4/2020	Q/2020/8/W8MBB1XM	ſK	700,000.00	35,000.00		735,000.00	Pending		≡·/	·
2020	08/0	4/2020	Q/2020/8/69M283AM	z	400,000.00	20,000.00		420,000.00	Pending	-		
ving 1 to 3 of 3 entries										C View Ra		-
s Quotation - View Details												
/ INFORMATION												
tomer Number : 2020/7/FA1J8PJKJ		Cus	tomer Name :									
Loboy ry recipional			iste Nigeria Limited		Sale Opportunity No : 5/2020/8/68005773			Sale Opp Gas	ortunity :			
ote No : 2020/8/69M283AMZ		Te							ount :			
ote No :		Te	iste Nigeria Limited		S/2020/8/68005773			Gas Total Ame	ount :			
ote No : 2020/8/69M283AMZ	٩	Te	iste Nigeria Limited		S/2020/8/68005773			Gas Total Ame	ount :		Show: 10	0 ~
Dte No : 020/8/69M283AMZ DTE ITEMS	Q	Te Sub 400	iste Nigeria Limited	Quantity 0	5/2020/8/60005773 Tax : 20.000.00	Discount	Final Amo	Gas Total Amv 420,000.0	ount :	Actions	Show: 10	0 ~
ote No : UC20/8/69M283AMZ OTE ITEMS er: Type to filter	Product	Te Sub 400	ste Nigeria Limited -Fotal : 000.00	Quantity 0	5/2020/8/60005773 Tax : 20.000.00	Discount 0.00	Final Armo 400.000	Gas Total Ame 420,000.00	ount :)	Actions		
ote No : UC20/8/69M283AMZ OTE ITEMS er: Type to filter	Product	Te Sub 400	ste Nigeria Limited		S/2020/8/60005773 Tax : 20.000.00 Amount ©			Gas Total Ame 420,000.00	ount :)			•
yte No : coco/6/69M283AMZ yte ITEMS IT: Type to filter ^	Product	Te Sub 400	ste Nigeria Limited		S/2020/8/60005773 Tax : 20.000.00 Amount ©			Gas Total Ame 420,000.00	ount :)		Remove	•
Ne No : 200/8/69M283AMZ DECITEMS TE TEMS TE TO Type to filter Type to filter Number of the type to filter	Product	Te Sub 400	ste Nigeria Limited	4	5/2020/8/68005773			Gas Total Ame 420,000.00	ount :)		Remove	•
te No : 200/8/69M283AMZ TE ITEMS T Type to filter	Product	Te Sub 400	ste Nigeria Limited	4	S/2020/8/60005773 Tax : 20.000.00 Amount ©			Gas Total Ame 420,000.00	ount :)		Remove	•
te No : 2008/69M283AMZ TE ITEMS TE ITEMS TE ITEMS TO Type to filter To Type to filter Type to filter	Product	Te Sub 400	ste Nigeria Limited	4	5/2020/8/68005773			Gas Total Ame 420,000.00	ount :)		Remove	•

Enter the required information the click on approve button down below

Sales Quotation - View Details								
VIEW INFORMATION								
Customer Number : C/2020/7/FA1J8PJKJ		Customer Name : Sale Opportunity No : Teste Nigeria Limited \$/2020/8/08005773		Sale O Gas	Sale Opportunity : Gas			
Quote No : Q/2020/8/69M283AMZ	Sub-Total: Tax: 400,000.00 20,000,00			Total Amount : 420,000.00				
QUOTE ITEMS								
Filter: Type to filter	Q							Show: 10
^	Product Name	Price 0	Quantity 0	Amount 0	Discount	Final Amount	Actions	٥
	Apple Mac Air	100,000.00	4	400,000.00	0.00	400,000.00	Details Update F	lemove
Showing 1 to 1 of 1 entries								- 1
Approval Information								
* Approval Type :								
Approved			~		Click c			
Comments :				_	Appro	ve button		
test								
				L	/		Activate Windows	
			Back to Pending Approval	List 🧰 Approve	Ξ+		io to settings to activa	LE WINDOWS.

3.0 Sales Opportunity Approval 2

Create new Product or Service Quote->click on new Service Quote

			8 B	rpected Amount : 400,001.00 Created On : 8/3/2020	Q Customer Account : DevC		Expected Close Date : Tuesday, 04 August Sales Opportunity No : 5/2020/8/89380848	2020	
	0 TOTAL MESSAGE	;	Q	0.00 Total sales expenses	Ď	Ł	0 cases	প্র	0 Sales activities
	Sales Opportu	nity Management					Se	ect an Action 🛛 👻	Change Sales Opportunity Status 🐣
Clickon		Initiate		Qualify	Que		4 Negotiate		5 Close
Create N Service Quote	tes	Management ESI Greate New Product Quote							
		83 Create New Service Quote							
									 Previous Next

	Sales Opportunity : Gas	
New Sales Quote		
ENTER YOUR INFORMATION		
* Due Date (MM/DD/YYY) : Enter Scheduled Date		
Back		Initiate Quote 🖪

Enter the necessary information then click on Initiate Quote

Sales Opportunity : Gas	
New Sales Quote	Click on the Initiate Quote button
* Due Cate (MM/DD/YYYY) : (III) 08(04/2020 Back (III)	

Then the system provide you where you are to add the necessary information shown down below

		Sales Opportunity : Gas		
	L Customer Account : DevC	ioy Limited Q Quote No : Q_2020_8_AYNI	P00B4	
' Sales Quote				
NTER YOUR INFORMATION				
ervice :	* Quote Type :	* Applied Discount :	Final Amount:	
Please Select	V Please Select	·		
abour Description :	* Hours/Days :	Rate :	* Amount :	
Enter your description here	Enter Hour/Day	Enter Rate	Enter Amount	
	1			
escription :	* Quantity :	Price per unit :	* Amount :	
Enter your description here	Enter Quantity	Enter Rate	Enter Amount	
				-
Add New Item 🖪				

Enter the required information and click on Add New Item

		L Customer Account :	Sales Opportunity : Gas	LPOOR4	
New Sales Quote					
ENTER YOUR INF	ORMATION				
Sandea -		* Quote Type :	* Applied Discount :	Final Amount:	
Clickon Add	aning Services	~ Labour	♥	400000.00	
New Item	in here	* Hours/Days :	Rate : 50,000	* Amount : 400000	
button	of the trace				
Add New	item 🖪				

The system provide you a grid where you can click on the "Action" to view Service Quotation details shown below

Type to filter Q								Show: 1
Service	^	Labour Description	\$ Hours/Days 0	Rate 0	Amount 0	Discount	Final Amount	Actions
Corporate Deep Cleaning Servic	15		8	50,000.00	400,000.00	0.00	400,000.00	Details Remove

3.1 Quote Management

Create New Service Negotiation

	0 TOTAL MESSAGES	0.00 TOTAL SALES EXPENSES	t d	0 CASES	SALES ACTIVITIE
	Sales Opportunity Management			- Select an Action	- ~ Change Sales Opportunity Status - ~
Clickon	Initiate	Qualify	Quote	(20) Negotiate	5 Close
Create New Service	Quotes Management S3 Create New Product Neg	station			
	63 Acute New Service Nego	fation			
					 Previous Next

The system provide Sales Negotiation-update form enter the necessary information and Submit

	Sales Opportu	00001 Expected Close Date : 8/4/2020 12:00:00 AM	
Sales Negotiation - Update			
ENTER YOUR INFORMATION			
Quote Number : Q_2020_8_AYNLP0084 Amount : 0.00			
* Negotiation Date (MM/DD/YYYY) :	Negotiated Amount :	Negotiated Outcome :	
Enter Scheduled Date	Enter Negotiated Amount	Please Select	*
Feedback :	At	tendees :	
Enter your Feedback here		Enter your Attendees here	
			Back to List 💼 Submit Feedback =+

Enter the necessary information and click on Submit Feedback

	Customer Accout : Dev	Coy Limited Created On : 8/3/2020 Sales	t : 400001 Expected Close	Date : 8/4/2020 12:00:00 AM	
ales Negotiation - Update					
ITER YOUR INFORMATION Quote Number : Q.2020_8_AYNLP0084 Amount : 0.00					Clickon the Submit
Vegotiation Date (MM/DD/YYYY) : 08/03/2020 edback :		Negotiated Amount : 290000	Attendees :	Negotiated Outcome : Negotiation Completed	Feedback button
eeobak.		h	Auendees . Enter your Attendees here	Back to List	Submit Feedback 2+

The system provide you Sales Quotation-details click on the Send for Approval button shown below Clickon the

								Sen
								Арр
ales Quotation - Details								butt
View information								
Home / Transaction / Sales Quotation								Actions
Sales Quotation - View Details					1	Back to Sales Opportunity	Request for more Discount	Send for Approval
VIEW INFORMATION								
Customer Number : C/2020/7/QE0EY339J	Customer Name : DevCoy Limited		Sale Opport 5/2020/8/8			Sale Opportu Gas	unity :	
uote No :	Sub-Total :		Tax:			Total Amoun		
Q_2020_8_AYNLP00B4	400,000.00		1ax : 20,000.00			420,000.00	n :	
ABOUR ITEMS								
LABOUR ITEMS								
ABOUR ITEMS								Show: 10 ~
	Labour Description	Hours/Days 0	Rate 🗘	Amount 0	Discount	Final Amount	C Action	

The system provide you Sales Quote Approval-pending list click on the "Action" icon in order to approve down below

Sales Quotes Approval - Pendir View Records	ng List							۰	
A Home / Transaction / Sales Quotes								Actions \lor	
Sales Quotation Approval - Pending Filter: Type to filter Q					Final			Show: 10 ~	Clickon the Approve Record
Transaction Date ^	Due Date 0	Sales Quote Number 0	Total Amount 0	Tax O	Amount	Status	0	Actions 3	
8/3/2020 Showing 1 to 1 of 1 entries	08/04/2020	Q_2020_8_AYNLP0084	400,000.00	20,000.00	420,000.00	Pending	ViewApp	Record 1 -	-

Enter the necessary information on Sale Quotation-view details may be sales won or lost then click on Approve shown down below

Sales Quotation - View Details						
VIEW INFORMATION						
Customer Number : C/2020/7/QE0EY339J	Customer Name : DevCoy Limited		Sale Opportunity No : 5/2020/8/89380848		Sale Op Gas	portunity :
	Sub-Total : 400,000.00		Tax : 20,000.00		Total An 0.00	nount :
QUOTE ITEMS						
Filter: Type to filter Q.						Show: 10 ~
Service Name	Price 0	Quantity 0	Amount 0	Discount 0	Final Amount	Actions 0
Corporate Deep Cleaning Services	50,000.00	8	400,000.00	0.00	0.00	Details Update Remove
Showing 1 to 1 of 1 entries						- 1 -
Approval Information						
* Approval Type :				Clickont		
Approved		~			le	
Comments :				Approve		
test				button		
				·	A	ctivate Windows
		Back to Pending Approval	List 💼 Approve 🗉	+		o to Settings to activate Windows.

3.2 Sales Opportunity Management

Click on Sales closure ->Close Sales

	O TOTAL MESSAGES	0.00 ROTAL SALES EXPENSES	ىلە	0 CASES	0 Sales activities
	Sales Opportunity Management			Select an Action	 Change Sales Opportunity Status
	Initiate	Qualify	Cuote	Negotiate	Close
Clickon					
CloseSale					
	Quote Number : Q_2020_8_A Imount : 420,000.00	YYNLPOOB4			
	83 Close Sales				
					Previous Submit form

The system provide you Sales Closure form

Expected Amount : 400,001.00 Q Customer Account	
Graated On: 8/3/2020 Sales Opportunely Status : Penderg	Sales Laad: Sales Opportunity No: 5/2020/8/89383848 Back to Sales Qualification
ENTER YOUR INFORMATION	
* Closure Status: Please Select	
* Actual Closed Date (MM/DD/YYYY) : Enter Sales Cosure Date	Reference Number : Enter Reference No
Name of Competitor loss to": Name of the competitor	Lost Reason Comments : Enter your description or notes here
	Back to List 😫 Close Sales #+

Enter the necessary information then click on Close Sales

Expected Amount : 400.001.00 Q Customer Acco	portunity : Gas unt: Gas 19 Sales Lead : Sales Opportunity No: S/2020/8/89300848
Sates Closure	Back to Sales Qualification
ENTER YOUR INFORMATION	
* Closure Status:	
Sales Won v	
* Actual Closed Date (MM/DD/YYYY) :	Reference Number :
08/03/2020	qdfghj
	Back to List 💼 Close Sales 🕸

Then the system provide you Sales Opportunity grids which indicate that the Sales Opportunity as been won

Filter: devcoy	Q								Sho	wc 10 ~
Customer Account	Opportunity No 0	Opportunity 0	Type 0	Expected Start Date 0	Expected End Date	Expected Amount 0	Actual End Date 0	Actual Amount 0	Status 0	Actions 0
DevCoy Limited	S/2020/7/06208279	Test Opportunity	Warm Opportunity	07/15/2020	7/31/2020 12:00:00 AM	150000		0	Pending	≡.
DevCoy Limited	S/2020/7/24232466	Gas	Warm Opportunity	07/27/2020	8/1/2020 12:00:00 AM	400000		0	Pending	≡.
DevCoy Limited	S/2020/7/95732261	Gas	Warm Opportunity	07/27/2020	8/1/2020 12:00:00 AM	400000		0	Pending	≡.
DevCoy Limited	\$/2020/7/69552623	Gas	Warm Opportunity	07/27/2020	8/1/2020 12:00:00 AM	400000		0	Pending	≡-
DevCoy Limited	5/2020/7/20935397	footwears	Cold Opportunity	07/28/2020	8/4/2020 12:00:00 AM	100000		0	Pending	Clickon the
DevCoy Limited	S/2020/7/13682933	footwears	Cold Opportunity	07/28/2020	8/4/2020 12:00:00 AM	100000	08/02/2020	315000	Sales Won	Close Sales button
DevCoy Limited	5/2020/8/29730169	footwears	Cold Opportunity	08/01/2020	8/4/2020 12:00:00 AM	300000	08/02/2020	0	Sales Wen	
DevCoy Limited	5/2020/8/89380848	Gas	Warm Opportunity	08/01/2020	8/4/2020 12:00:00 AM	400001	08/03/2020	420000	Sales Won	≡.
showing 1 to 8 of 8 entries (f	filtered from 109 total entries))								- 1 -

3.3 Sales Opportunity Approval

Create Sales Opportunity

Enter the necessary information New Sales Opportunity

New Sales Opportunity						
ENTER YOUR INFORMATION						
Create New Customer Account 😒 * Customer Acount :		Opportunity Type:		* Transaction Type:		
Please Select * Sales Opportunity :	~	Please Select	Ý	Please Select * Expected Amount:		~
Enter Sales Opportunity				Enter Sales Expected	Amount	
* Commencement Date (MM/DD/YYYY) :	* Expected Closed Date (I	MM/DD/YYYY):	* Currency :		Purchase Time Frame:	
Enter Commencement Date	Enter Expected	I Closed Date	Please Select	~	Please Select	Ý
Description / Notes :						
Enter your description or notes here						
		,				

Enter the required information and click on the Create Opportunity

lew Sales Opportunity								
NTER YOUR INFORMATION								
Create New Customer Account 🛛 😓								
Customer Acount :	*0	Opportunity Type:		*1	ransaction Type:			
Billux Nigeria Limited	Ý	Hot Opportunity		~	New Business		÷	
Sales Opportunity :				* 5	xpected Amount:			
footwears					630,000			
Commencement Date (MM/DD/YYYY) :	* Expected Closed Date (MI	W/DD/YYYY) :	* Currency :			Purchase Time Frame:	Γ	Clickonthe
(B) 08/01/2020	08/04/2020		Naira		Ý	Immediate		
								create
escription / Notes :								Opportunity
Enter your description or notes here								Opportunity after entering
								after enterir
			li.					• data

3.4 Quote Management

Create New Product Quote

Clickon	0 AL MESSAGES	0.00 TOTAL SALES EXPENSES	t d		0 sales activities
Create	es Opportunity Management			Select an Action	Y Change Sales Opportunity Status Y
New Product Quote	Initiate	Qualify	(Ø) Quote	4 Negotiate	S Close
	Quotes Nanagement	xt Quote			
	El Create New Servic	e Quote			
					Previous Next

The system provide you new Sales Quote form

	Sales Opportunity : footwears Customer Account : Billux Nigeria Limited Q U U
New Sales Quote	
ENTER YOUR INFORMATION	
* Due Date (MM/DD/YYYY) :	Quotation Type :
Enter Scheduled Date	Please Select ~
Back 💼	Initiate Quote 🔰

(Sales Opportunity : footwears	
New Sales Quote ENTER YOUR INFORMATION		Clickon the
* Due Date (MM/DD/YYYY) :	Quotation Type : Amount Based	Initiate Quote
Bok 📾		Initiate Quote

Enter the necessary information then click on Initiate Quote

Then the system provide you where you are to add the necessary information shown down below

	Sales Opportu	unity : footwears	
New Sales Quote			
ENTER YOUR INFORMATION			
* Product : Please Select ~	Quote Item : Enter Quote Item	Quantity : Enter Quantity	* Price : Enter Amount
* Amount : Enter Amount	Description : Enter your description here	* Applied Discount :	Final Amount:
Add New Item 🖋			

Enter the necessary information and click on Add New Item shown below

		Sale:	s Opportunity : footwears	WEARMC	
	New Sales Quote				
	ENTER YOUR INFORMATION				
Clickon	* Product : Apple Mac Air	Quote Item :	Quantity :	* Price :	
the Add New Item	* Amount : 600000	Description : Enter your description here	* Applied Discount : 0	Final Amount: 600000.00	
	Add New Item 🔺		h.		

The system provide you details about the Sales Quote

	ITEMS										
	Filter:	Type to filter	Q								Show: 10 ×
		^	Product Name 0	Quote Item 🗘	Item Description	Quantity 🗘	Price	Amount 0	Discount 0	Final Amount	Actions 0
	4		Apple Mac Air	black		4	150000	600000	0	600000	Details Remove
Clickon Ba to Sales	ck	1 of 1 entrie	15								- 1 →
Opportunit	ty	ATION									
		otal Amour	nt: 600,000.00 Tax: 30,0	00.00 Total Amount : 6	30,000.00						
	Back	c to Sale Oppor	tunity 💼								View Quote 💼

3.5 Quote Management

Click on Manage Product Quote

Clickon Manage Product Quote	Quotes Management
	83 Managa Product Quote 83 View Product Quote 83 Create New Service Quote
	Quote Number : 0/2020/R/WF0WBAEMC Annount : 630,000.00 Status : Pending
	◆ Previous Next ◆

Click on the "Action" icon in the grid to Request for Approval

	Expected Amount : 630,00	Opportunity	igeria Limited 🛛 🛛 Expected	Close Date : Tuesday, 04 A	ugust 2020	
Sales Quote Filter. Q						Bet to See Auditate Click on Reques 5 for Approval
Customer Account	Sales Opportunity	Sales Quote Number	Total Amount 🗘	Tax û	Final Status	O PACIDINS
Billux Nigeria Limited	footwears	Q/2020/8/WFDW8AEMC	600,000.00	30,000.00	630,000.00 Pending	=-
Showing 1 to 1 of 1 entries						IG View Record Request for Approval Request for Discount

The system display that the Product Sales Quote Approval as been sent successfully

					1	Back to Sales Quali
						Show:
Sales Quote Number	C Total Amount	0 т	Tax 0	Final Amount	Status	 Actio
Q/2020/8/WFDW8AEMC	600,000.00	3	30,000.00	630,000.00	Pending Approval - Junior Approval Role	=
	-				C Sales Quote Number C Total Amount C Tax Amount Amount Amount	C Sales Quote Number C Total Amount C Tax Amount Status

3.6 Sales Quote Approval Pending list

Junior Approval Role->click on "Action" icon in the grid in order to approve pending Sales Quote

Home / Transaction / Sales Quotes									Actions \lor
les Quotation Approval - Pending									Clickon
er: Type to filter Q									the
nsaction Date	Due Date 0	Sales Quote Number	0 Total Amount	0	Tax O	Final Amount	Status	¢	Approve Record
0-07-21	07/22/2020	Q/2020/7/10ZBHQQLW	150,000.00		7,500.00	157,500.00	Pending		=7
/2020	08/04/2020	Q/2020/8/W8MBB1XMK	700,000.00		35,000.00	735,000.00	Pending		
3/2020	08/04/2020	Q/2020/8/WFDW8AEMC	600,000.00		30,000.00	630,000.00	Pending		=-

The system provide you Sales Quotation Approval form

Sales Quotation - View Details	s								
VIEW INFORMATION									
Customer Number : C/2020/7/W08KP8PFB		istomer Name : Sillux Nigeria Limited		Sale Opportunity No : 5/2020/8/79240419		Sale Op footw	portunity : ars		
Quote No : Q/2020/8/WFDW8AEMC		b-Total : 0,000.00		Tax : 30,000.00		Total Ai 630,000			
QUOTE ITEMS									
Filter: Type to filter	Q							Show: 10	~
^	Product Name 🗘	Price 0	Quantity \Diamond	Amount 0	Discount	Final Amount	Actions	4	0
	Apple Mac Air	150,000.00	4	600,000.00	0.00	600,000.00	Details Update R	lemove	
Showing 1 to 1 of 1 entries								- 1	-
Approval Information									
* Approval Type :									
Please Select				*					
Comments :	- h								
Enter your description or notes	s nere					Δ	ctivate Windows		
				10	_		o to Settings to activa		S.
			Back to Pending Approval	List 💼 Approve	8+				

Enter the necessary information and click on Approve button shown below

Sales Quotation - View Details									
VIEW INFORMATION									
Customer Number : C/2020/7/W0BKP8PFB		stomer Name : Illux Nigeria Limited		Sale Opportunity No : 5/2020/8/79240419			le Opportunity : ootwears		
Quote No : Q/2020/8/WFDW8AEMC		9-Total : ,000.00		Tax : 30,000.00			tal Amount : 0,000.00		
QUOTE ITEMS									
Filter: Type to filter	Q							Show:	10 ~
^	Product Name	Price 0	Quantity 0	Amount 0	Discount	Final Amount	÷	Actions	0
	Apple Mac Air	150,000.00	4	600,000.00	0.00	600,000.00		Details Update Remove	
Showing 1 to 1 of 1 entries								-	1 -
Approval Information									
* Approval Type : Approved						lickonthe			
Comments :									
TEST						pprove 			
						utton	l ctiv ct	te Windows	
					/			ttings to activate Win	idows.
			Back to Pending Approval	List 🧰 Approve	= +				

3.7 Sales Quote Approval Junior Officer 2 Role

Junior Approval Role->click on "Action" icon in the grid in order to approve pending Sales Quote

						**	ନ୍ଷ୍ଣ 🌑	myseunbay@gmail.com ~
Sales Quotes Approval - Pendir View Records	ng List							٠
A Home / Transaction / Sales Quotes								Actions \sim
Sales Quotation Approval - Pending								
Filter: Type to filter Q								Clickon the
Transaction Date	Due Date 0	Sales Quote Number 0	Total Amount	Tax 0	Final Amount	Status	¢	Approve Record
2020-07-22	07/22/2020	Q/2020/7/FJ4WZ081Y	750,000.00	37,500.00	787,500.00	Pending		
8/3/2020	08/04/2020	Q/2020/8/WFDW8AEMC	600,000.00	30,000.00	630,000.00	Pending		=-
Showing 1 to 2 of 2 entries							III View R	K 1

The system provide you Sales Quote Approval form

ustomer Number :		Customer Name :		Sale Opportunity No :			portunity :	
C/2020/7/W0BKP8PFB		Billux Nigeria Limited		5/2020/8/79240419		footwe		
iote No : 2020/8/WFDW8AEMC		Sub-Total : 600,000.00		Tax : 30,000.00		Total An 630,000.		
OTE ITEMS								
er: Type to filter	Q						SF	ow: 10
^	Product Name	> Price O	Quantity 0	Amount 0	Discount	Final Amount 0	Actions	
	Apple Mac Air	150,000.00	4	600,000.00	0.00	600,000.00	Details Update Remov	1
wing 1 to 1 of 1 entries	Apple Mac Air	150,000.00	4	600,000.00	0.00	600,000.00	[Details] Update Remov	e ← 1
	Apple Mac Air	150.000.00	4	600,000,00	0.00	600,000.00	[Details Update Remov	
proval Information	Apple Mac Air	150,000,00	4	600.000.00	0.00	600.000	[Details Update Remov	
wing 1 to 1 of 1 entries roval Information oproval Type : - Please Select	Apple Mac Air	150,000.00	4		0.00	600.000.00	Details Update Remov	
roval Information proval Type : Please Select	Apple Mac Air	150,000.00			0.00	600.000.00	[Details Update Remov	
proval Information		150,000.00			0.00	600.000	[Details Update Remov	

Enter the necessary information and click on approve button

VIEW INFORMATION									
Customer Number : C/2020/7/W08KP8PFB		stomer Name : illux Nigeria Limited		Sale Opportunity No : S/2020/8/79240419			e Opportunity : notwears		
Quote No : Q/2020/8/WFDW8AEMC		-Total : ,000.00		Tax : 30,000.00			al Amount : 1,000.00		
QUOTE ITEMS									
Filter: Type to filter Q								Show:	10 ~
^ F	roduct Name	Price 0	Quantity 0	Amount 0	Discount	Final Amount	0	Actions	0
	Apple Mac Air	150,000.00	4	600.000.00	0.00	600,000.00		Details Update Remove	
Showing 1 to 1 of 1 entries								-	1 -
Approval Information									
* Approval Type :					Clic	kon the			
Approved			~		App	rove			
Comments : TEST					butt				
					/		Activate \	Windows gs to activate Windo	

3.8 Sales Quote Approval Senior Officer Role

Senior Approval Role->click on "Action" icon in the grid in order to approve pending Sales Quote

 the second second	ng List	1						1		**	୍ <mark>ଦି (</mark>	barnisondads1@gmail.com
Home / Transaction / Sales Quotes ales Quotation Approval - Pending liter: Type to filter Q.												Click
Transaction Date ^	Due Date	٥	Sales Quote Number	٥	Total Amount	٥	Тах	¢	Final Amount	Status		Reco
8/3/2020	08/04/2020		Q/2020/8/WFDW8AEMC		600,000.00		30,000.00		630,000.00	Pending		1
Showing 1 to 1 of 1 entries												View Record 1 -

The system provide you Sales Quote Approval form

Sales Quotation - View Details								
VIEW INFORMATION								
Customer Number : C/2020/7/W08KP8PF8		stomer Name : illux Nigeria Limited		Sale Opportunity No : S/2020/8/79240419		Sale Oppo footwear		
Quote No : Q/2020/8/WFDW8AEMC		b-Total : 0,000.00		Tax : 30,000.00		Total Amo 630,000.00		
QUOTE ITEMS								
Filter: Type to filter	٩						Sho	M: 10 ~
^	Product Name	Price 0	Quantity 0	Amount 0	Discount	Final Amount 0	Actions	¢
	Apple Mac Air	150,000.00	4	600,000.00	0.00	600,000.00	Details Update Remove	
Showing 1 to 1 of 1 entries								- 1 -
Approval Information								
* Approval Type :								
Please Select								
Comments :				_				
Enter your description or notes he	re							
				i.			tivate Windows to Settings to activate Wi	indows.
			Back to Pending Approval	List 🧰 Approve	≣+			

Enter the necessary information and click on approve button

ustomer Number :		stomer Name :		Sale Opportunity No :			pportunity :
C/2020/7/W0BKP8PFB	5	illux Nigeria Limited		5/2020/8/79240419		footv	vears
Quote No : 0/2020/8/WFDW8AEMC		b-Total : 0.000.00		Tax : 30.000.00		Total / 630.00	Amount :
(2020)0) IN DIVONCINC				30,000.00		030,00	
QUOTE ITEMS							
Type to filter Q							Show: 10
^	Product Name \Diamond	Price 0	Quantity 0	Amount 0	Discount	Final Amount	C Actions
	Apple Mac Air	150,000.00	4	600,000.00	0.00	600,000.00	Details Update Remove
howing 1 to 1 of 1 entries							- 1
							- 1
Approval Information							- 1
pproval Information			~		Clie	ckon the	- 🖬
Rowing 1 to 1 of 1 entries Approval Information Approval Type : Approved Comments :			×			ckon the prove button	- 1
pproval Information Approval Type : Approved			÷				-

3.9 Quote Management

Click on Create New Negotiation

O TOTAL MES	SAGES	Q	0.00 total sales expenses	Ê	<i>₽</i>	c	0 E5		0 SALES ACTIVITIES
Clickon	inity Management						Select an Action 💉	Change Sales Opportunit	y Status 🗡
Create New Product Negotiation	Initiate		Qualify	•	uote	(2) Negotiate		5 Close	
Qu	Notes Management								
	123 Create New Product Na 123 Create New Service Ne	_							
								 Previous 	Next 🔶

The system provide you Sales Negotiation form

		Opportunity : footwears		
			xpected Close Date : 8/4/2020 12:00:00 AM	
	Created On : 8/3	/2020 Sales Opportunity Status : Pending		
Sales Negotiation - Update				
ENTER YOUR INFORMATION				
Quote Number : Q/2020/8/4ADMAPF9M Amount : 630	,000.00			
* Negotiation Date (MM/DD/YYYY) :	Negotiated Amount :		Negotiated Outcome :	
Enter Scheduled Date	Enter Negotiated Amount		Please Select	~
Feedback :		Attendees :		
Enter your Feedback here		Enter your Attendees here		li
			Back to Li	st 💼 Submit Feedback ≣+

Enter the necessary information on Sales Negotiation and click Submit Feedback as it is shown below

Sales Negotiation - Update EVER YOUR INFORMATION Quote Number : Q/2020/8/ADDMAPF9M Amount : 630,000.00 * Negotiation Date (MM/DD/YYY) : Negotiated Amount : @ 00/03/2020 63000 Regotiation Completed Submit Feedback : Attendees : Satisfactory Enter your Attendees here		Sales Opportur Customer Accout : Billux Nigeria Limited Greated On : &3/2020 Sales		
Negotistion Date (MM/DD/YYY): Negotisted Amount: Negotisted Amount: Negotisted Outcome: Click on the Submit section Completed Submit Satisfactory Standards Negotisted Completed Submit Satisfactory Standards Negotisted Negotistical Completed Submit Satisfactory Standards Negotisted Completed Submit Satisfactory Standards Negotisted Completed Submit Satisfactory Standards Negotisted Completed Submit Satisfactory Standards Negotistical Completed Standards Negotistical Completed Standards Negotistical Completed Submit Satisfactory Standards Negotistical Completed S				
Image: Complete display the sector of the	Quote Number : Q/2020/8/4ADMAPF9M Amount : 630,	000.00		
Satisfactory Enter your Attendees here Feedback button	08/03/2020		- Negotiation Completed	Clickon the Submit
		h		button

4.0 Sales Opportunity Management Click on Sales closure ->Close Sales

	O TOTAL MESSAGES	Q	0.00 TOTAL SALES EXPENSES	Ĉ	ŕ	0 دەق	0 Sales activities
	Sales Opportunity Management					Select an Action	~ Change Sales Opportunity Status ~
Clickon Sales Close	Lititiate Sales Closure Quote Number : 0//2020/9/01M Amount : 630,000.00	WLZLEP	Quality	Que	rte	Negotiate	Close
							Previous Submit form

The system provide you Sales Closure form

		Sales Opportunity : foot	wears		
	Expected Amount : 630,000.00	Customer Account : footwears	Expected Close Date : Tuesday, 04 August 202	20	
	Created On : 8/3/2020 Sales Oppo	ortunity Status : Pending Sales Lead :	Sales Opportunity No : S/2020/8/79240419		
Sales Closure				Back	to Sales Qualification
ENTER YOUR INFORMATION					
* Closure Status:					
Please Select		~			
* Actual Closed Date (MM/DD/YYYY) :		Reference Nur	mber :		
Enter Sales Closure Date		Enter Refer	ence No		
Name of Competitor lost to":		Lost Reason C	omments :		
Name of the competitor		Enter your	description or notes here		
					11
				Back to List 💼	Close Sales ≡+

Enter the necessary information and click on Close Sales button shown below

	Expected Amount : 630,000,00 Customer Account	unity : footwears : footwars 2 Expected Close Date : Tuesday, 04 August 2020 g Sales Lead: Sales Opportunity No: 5/2020/8/79240419		
ales Closure			Back to Sales Q.	Clickon the
ITER YOUR INFORMATION Closure Status:				Close Sales button
Sales Won Actual Closed Date (MM/DD/YYYY) :	~	Reference Number :	L	/
(B) 08/04/2020		SDFGHIX	Back to List 💼 Close S	ales #+

Then the system provide you Sales Opportunity grids which indicate that the Sales Opportunity as been won

Filter: BILLUX	Q								Sh	ow: 10 ~
Customer Account	Opportunity No 🛛 🗘	Opportunity 0	Туре 0	Expected Start Date	Expected End Date	Expected Amount 0	Actual End Date 0	Actual Amount 0	Status 0	Actions 0
Billux Nigeria Limited	5/2020/7/19510724	Gas supply	Warm Opportunity	07/07/2020	7/24/2020 12:00:00 AM	1300000		0	Pending	≡-
Billux Nigeria Limited	5/2020/7/76597574	Gas supply	Warm Opportunity	07/07/2020	7/24/2020 12:00:00 AM	1300000	07/10/2020	15750000	Sales Won	≡-
Billux Nigeria Limited	5/2020/7/49438556	Not Applicable	Warm Opportunity	07/23/2020	7/31/2020 12:00:00 AM	350000	07/23/2020	315000	Sales Won	≡-
Billux Nigeria Limited	5/2020/7/46926468	Test Incident	Warm Opportunity	07/24/2020	7/31/2020 12:00:00 AM	350000		0	Pending	≡-
Billux Nigeria Limited	S/2020/8/35790007	HENRY	Hot Opportunity	08/03/2020	8/18/2020 12:00:00 AM	400000		0	Pending	≡-
Billux Nigeria Limited	S/2020/8/41372865	footwears	Hot Opportunity	08/01/2020	8/4/2020 12:00:00 AM	500001		0	Pending	≡-
Billux Nigeria Limited	S/2020/8/79473944	footwears	Hot Opportunity	08/01/2020	8/4/2020 12:00:00 AM	600000		0	Pending	≡-
Billux Nigeria Limited	S/2020/8/70564488	footwears	Hot Opportunity	08/01/2020	8/4/2020 12:00:00 AM	630000		0	Pending	≡-
Billux Nigeria Limited	5/2020/8/79240419	footwears	Hot Opportunity	08/01/2020	8/4/2020 12:00:00 AM	630000	08/04/2020	630000 Activate Win	Sales Won	≡-

4.1 Sales Opportunity Approval

Create Sales Opportunity

Enter the necessary information on New Sales Opportunity

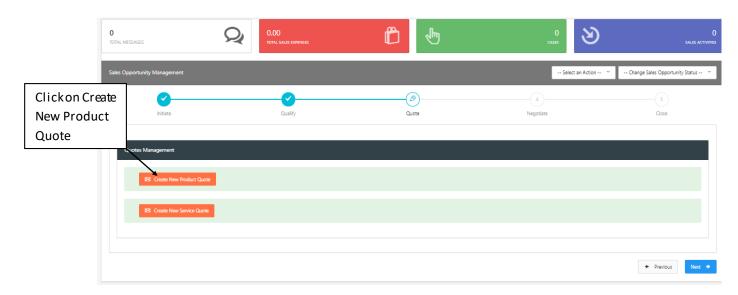
≡ u ⁹			🙌 🔎 myseunbay@gmail.com v
New Sales Opportunity			
ENTER YOUR INFORMATION			
Create New Customer Account			
* Customer Acount : Please Select	* Opportunity Type: ~ Please Select		* Transaction Type: Please Select ·
* Sales Opportunity :			* Expected Amount:
Enter Sales Opportunity			Enter Sales Expected Amount
* Commencement Date (MM/DD/YYYY) :	* Expected Closed Date (MM/DD/YYYY) :	* Currency :	Purchase Time Frame:
Enter Commencement Date	Enter Expected Closed Date	Please Select	 Please Select
Description / Notes :			
Enter your description or notes here			
		1	
			Back to List 📫 Create Opportunity 👫

Enter the required information and click on the Create Opportunity

ENTER YOUR INFORMATION								
Create New Customer Account 🛛 😓								
Customer Acount :		* Opportunity Type:			* Transaction Type:			
Doomie Limited	~	Hot Opportunity		~	New Business			
Sales Opportunity :					* Expected Amount:			Clickon the
Gas					900,000			Create
Commencement Date (MM/DD/YYYY) :	* Expected Closed Date	e (MM/DD/YYYY) :	* Currency :			Purchase Time Frame:		Opportunity
08/03/2020	68/05/2020		Naira		Ŷ	Open		
Description / Notes :								button
Enter your description or notes here			le le			Back to List 💼	Create Opportunity	24

4.2 Quote Management

Click on Create New Product Quote



The system provide you new Sales Quote form

Sales O	pportunity : Gas
New Sales Quote	
ENTER YOUR INFORMATION	
* Due Date (MM/DD/YYYY) :	Quotation Type :
Enter Scheduled Date	Please Select V
Back 💼	Initiate Quote 🛷

Enter the necessary information and click on the Initiate Quote button

	Sales Opportunity : Gas		
New Sales Quote ENTER YOUR INFORMATION Due Date (MM/DD/YYYY) :	Quotation Type : Amount Based	Ini	ckon the tiate Quote tton
Back 🏟		Initiate Quote 🚀	

Then the system provide	you where you are	to add the necessary	y information shown	down below
-------------------------	-------------------	----------------------	---------------------	------------

		Q Quote No : Q/2020/8/QDNHPB4MP	
New Sales Quote			
ENTER YOUR INFORMATION			
* Product :	Quote item :	Quantity :	* Price :
Please Select V	Enter Quote Item	Enter Quantity	Enter Amount
* Amount : Enter Amount	Description : Enter your description here	* Applied Discount :	Final Amount:
Add New Item 🛷			

Enter the necessary information then click on the Add New Item button as it shown below

New Sales Quote				
ENTER YOUR INFORMATIO	24			
Clickon the Add New Item	Quote Item :	Quantity : 6	* Price : 150,000	
button	Description : Enter your description here	* Applied Discount : 0	Final Amount: 900000.00	
Add Nex Item 🖌				

The system indicate that the quote item is added successfully

	ITEMS									
	Filter: Type to filter	Q								Show: 10 ×
	^	Product Name 🗘	Quote Item 0	Item Description 0	Quantity $\hat{~}$	Price	Amount 0	Discount 🗘	Final Amount	Actions 0
		Apple Mac Air	black		6	150000	900000	0	900000	Details Remove
Clickon Back to Sales	Showing 1 to 1 of 1 entrie	25								- 1 -
Opportunity	SUBMIT QUOTATION									
	Sub-Total Amour	nt: 900,000.00 Tax: 45,0	00.00 Total Amount : 9	45,000.00						
	Back to Sale Oppor	tunity 📾							Activate Wi	View Quote 📾

4.3 Quote Management

Click on Manage Product Quote then the system will display Sales Quote grid shown below

	O TOTAL MESSAGES		.00 Ital sales expenses	Ĉ	ŕ	0 cases	প্ত	0 Sales activities
Clickon	s Opportunity Management					Se	lect an Action 🍸 Ch	ange Sales Opportunity Status 🍸
Manage Product	Initiate		Qualify	Que		4 Negotiate		5 Close
Quote	Quotes Management		_					
	El Manage Product (El Create New Servic	_						
	Quote Number : Q/2020/8/ Amount : 945,000.00 Status : Pending	3/QDNHPB4MP						
								♠ Previous

Click on the "Action" icon in the grid to Request for Approval

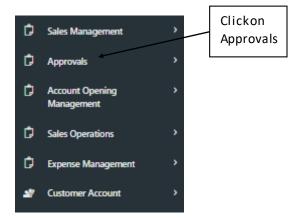
	Expected Amount : 900,0	00.00 (Qr Customer Account : Dooms Greated On : 84/2020 Sale	e Limited Expected Close	e Date : Wednesday, 05 At	igust 2020			
Sales Quote						Ba	ick to Sales Qualification	
Filter: Type to filter Q							Show: 10 Y	Clickon requestfor
Customer Account	Sales Opportunity $\hat{~}$	Sales Quote Number	Total Amount	Tax 0	Final Amount	Status 0	Actions 0	Approval
Doomie Limited	Gas	Q/2020/8/QDNHPB4MP	900,000.00	45,000.00	945,000.00	Pending	=	
Showing 1 to 1 of 1 entries							t for Approval 1 -	

The system display that the request for approval as been sent successfully

	Expecte	ed Amount : 900,000.00		Opportunity mer Account : Doomie Limi On : 8/4/2020 Sales Opp	ted		ed Close Date : We	ednesday. 05 August 2020		
Sales Quote									Back t	o Sales Qualification
 Information - Quote sent 	for approval successfully !									×
Filter: Type to filter	Q									Show: 10 ~
Filter: Type to filter		Sales Quote Number	¢	Total Amount	с Ті	Tax 0	Final Amount	Status	\$	Show: 10 ~ Actions

4.4 Product Quotation Approval Pending list

Click on Approval-> Pending Approval



Junior Approval Role->click on "Action" icon in the grid in order to approve pending Sales Quote

 Sales Quotes Approval - Pendir View Records Home / Transaction / Sales Quotes 	ng List						Ac	¢ tions ~
iales Quotation Approval - Pending								
iter: Type to filter Q							Show:	10 ~
ransaction Date ^	Due Date 0	Sales Quote Number 0	Total Amount	Tax 0	Final Amount	Status 0	Actions	
120-07-21	07/22/2020	Q/2020/7/10ZBHQQLW	150,000.00	7,500.00	157,500.00	Pending	=-	Clickonthe
2/2020	08/04/2020	Q/2020/8/W8MBB1XMK	700,000.00	35,000.00	735,000.00	Pending	=-	Approve
4/2020	08/05/2020	Q/2020/8/QDNHPB4MP	900,000.00	45,000.00	945,000.00	Pending	=-	Record
4/2020	08/05/2020	Q/2020/8/QDNHPB4MP	900,000.00	45,000.00	945,000.00	Pending	=-	/
nowing 1 to 4 of 4 entries							w Record prove Record	-

Sales Quotation - View Details	1								
VIEW INFORMATION									
Customer Number : C/2020/6/Y9M8P7E02		stomer Name : Doomie Limited		Sale Opportunity No : 5/2020/8/38033902		Sale (Gas	Opportunity : :		
Quote No : Q/2020/8/QDNHPB4MP		b-Total : 0,000.00		Tax : 45,000.00		Total 945,0	Amount : 00.00		
QUOTE ITEMS									
Filter. Type to filter	Q							Show:	10 ~
^	Product Name	Price 0	Quantity 0	Amount 0	Discount	Final Amount	Action	5	٥
	Apple Mac Air	150,000.00	6	900,000.00	0.00	900,000.00	Details Upda	te Remove	
Showing 1 to 1 of 1 entries								-	1 -
Approval Information									
* Approval Type :									
Please Select			~						
Comments :				_					
Enter your description or notes	here			h.			Activate Windov Go to Settings to acti		dows.
			Back to Pending Approval	List 🧰 Approve	E +		5		

Enter the necessary information and click on the approve button

Sales Quotation - View Details								
VIEW INFORMATION								
Customer Number : C/2020/6/Y9M8P7E02		tomer Name : oomie Limited		Sale Opportunity No : 5/2020/8/38033902			Sale Opport Gas	unity :
Quote No : Q/2020/8/QDNHPB4MP		9-Total : 1,000.00		Tax : 45,000.00			Total Amou 945,000.00	nt:
QUOTE ITEMS								
Filter: Type to filter Q								Show: 10 ~
~	Product Name	Price 0	Quantity 0	Amount 0	Discount	Final Amount	0	Actions 0
	Apple Mac Air	150,000.00	6	900,000.00	0.00	900,000.00		Details Update Remove
Showing 1 to 1 of 1 entries								- 1 -
Approval Information								
* Approval Type :					Cli	ckon the		
Approved			Ŷ			prove		
Comments : TEST						tton		
								ivate Windows o Settings to activate Windows.
			Back to Pending Approval I	List 🧰 Approve	≡+			~

4.5 Product Quotation Approval Pending list

Click on Approval-> Pending Approval



Junior Approval Role 2->click on "Action" icon in the grid in order to approve pending Sales Quote

Ly Draine Sales Quotes Approval - Pendin View Records	g List					** \$	Y myseunt	ay@gmail.com ∨ ¢
Home / Transaction / Sales Quotes								Actions ~
Sales Quotation Approval - Pending								
Filter: Type to filter Q							Sho	Clickon the
Transaction Date	Due Date 0	Sales Quote Number	Total Amount 0	Tax 0	Final Amount	Status	о A	Approve
2020-07-22	07/22/2020	Q/2020/7/FJ4WZ081Y	750,000.00	37,500.00	787,500.00	Pending		Record
3/4/2020	08/05/2020	Q/2020/8/QDNHPB4MP	900,000.00	45,000.00	945,000.00	Pending		
howing 1 to 2 of 2 entries							View Record	1

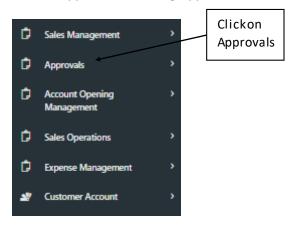
Sales Quotation - View Details								
VIEW INFORMATION								
Customer Number : C/2020/6/Y9M8P7E02		Eustomer Name : Doomie Limited		Sale Opportunity No : S/2020/8/38033902		Sale Op Gas	portunity :	
Quote No : 0/2020/8/QDNHPB4MP		5ub-Total : 200.000.00		Tax : 45,000.00		Total An 945,000		
QUOTE ITEMS								
liter: Type to filter	Q						Sho	w: 10 °
^	Product Name	Price 0	Quantity 0	Amount 0	Discount	Final Amount 0	Actions	0
	Apple Mac Air	150,000.00	6	900,000.00	0.00	900,000.00	Details Update Remove	I
howing 1 to 1 of 1 entries								1
pproval Information								
Approval Type :								
Please Select			~	•				
Comments : Enter your description or notes h								
Enter your description or notes in	sere							
				h.			ctivate Windows to Settings to activate W	

Enter the necessary information and click on the approve button

Sales Quotation - View Details	5									
VIEW INFORMATION										
Customer Number : C/2020/6/Y9M8P7E02		stomer Name : Ioomie Limited		Sale Opportunity No : 5/2020/8/38033902			Sale Opportu Gas	nity :		
Quote No : Q/2020/8/QDNHPB4MP		b-Total : 0,000.00		Тах : 45,000.00			Total Amount 945,000.00			
QUOTE ITEMS										
Filter: Type to filter	Q								Show:	10 ~
^	Product Name	Price 0	Quantity 0	Amount 0	Discount	Final Amount	0	Actions		٥
	Apple Mac Air	150,000.00	б	900,000.00	0.00	900,000.00		Details Update Rem	iove	
Showing 1 to 1 of 1 entries						1			-	1 -
Approval Information										
* Approval Type :										
Approved			÷							
Comments :				_						
test				le.				vate Windows Settings to activate	Wind	ows.
			Back to Pending Approval I	List 🧰 Approve	# +		_ 0 10			

4.6 Product Quotation Approval Pending list

Click on Approval-> Pending Approval



Senior Approval Role ->click on "Action" icon in the grid in order to approve pending Sales Quote

= ty ⁹⁹ Craine								**	ಧಿ 🌒	bamisondads1@gmail.com ∨
Sales Quotes Approval - Pendir View Records	ng List									۰
Reference Home / Transaction / Sales Quotes										Actions 🗸
Sales Quotation Approval - Pending Filter: Type to filter. Q										Clickon the Approve Record
Transaction Date	Due Date 0	Sales Quote Number	0	Total Amount	0	Тах	 Final Amount 	Status	0	Actions
8/4/2020	08/05/2020	Q/2020/8/QDNHPB4MP		900,000.00		45,000.00	945,000.0	0 Pending		=-
Showing 1 to 1 of 1 entries									IC View	

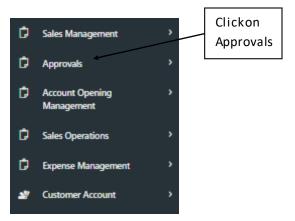
Sales Quotation - View Detail	5								
EW INFORMATION									
ustomer Number : C/2020/6/Y9M8P7E02		stomer Name : oomie Limited		Sale Opportunity No : S/2020/8/38033902		Sale Opj Gas	portunity :		
uote No : /2020/8/QDNHPB4MP		p-Total : (,000.00		Tax : 45,000.00		Total An 945,000.0			
JOTE ITEMS									
Iter: Type to filter	Q						Shov	<i>n</i> : 10	~
^	Product Name	Price 0	Quantity 0	Amount 0	Discount	Final Amount 0	Actions		0
	Apple Mac Air	150,000.00	б	900,000.00	0.00	900,000.00	Details Update Remove		
lowing 1 to 1 of 1 entries							-	1	-
oproval Information								_	
Approval Type :									
Please Select			~						
omments :				_					
Enter your description or note	s here								
				10			ctivate Windows to Settings to activate Wi	indow	VS.
			Back to Pending Approval	List 🧰 Approve	≡+		-		

Enter the necessary information and click on the approve button

Sales Quotation - View Details	5								
VIEW INFORMATION									
Customer Number : C/2020/6/Y9IM8P7E02		stomer Name : loomie Limited		Sale Opportunity No : 5/2020/8/38033902			Sale Opportun Gas	ity :	
Quote No : Q/2020/8/QDNHP84MP		b-Total : 0,000.00		Tax : 45,000.00			Total Amount : 945,000.00	:	
QUOTE ITEMS									
Filter: Type to filter	٩							Show:	10 ~
^	Product Name	Price 0	Quantity 0	Amount 0	Discount	Final Amount	٥	Actions	0
	Apple Mac Air	150,000.00	б	900,000.00	0.00	900,000.00		Details Update Remove	
Showing 1 to 1 of 1 entries								- 1	-
Approval Information									
* Approval Type :									
Approved			~		Clicko				
Comments :					Approv	/e button			
TEST									
				4				vate Windows Settings to activate Windo	
			Back to Pending Approval	List 🧰 Approve	≣+			Settings to activate winde	J ¥ # 3 *

4.7 Product Quotation Approval Pending list

Click on Approval-> Pending Approval



Senior Approval Role 2 ->click on "Action" icon in the grid in order to approve pending Sales Quote

Sales Quotes Approval - Pending View Records	g List							•
Home / Transaction / Sales Quotes								Actions \sim
ales Quotation Approval - Pending								
ilter: Type to filter Q							5	show: 10 ~
ransaction Date ^	Due Date 0	Sales Quote Number 0	Total Amount	Tax 0	Final Amount	Status	0	Actions 0
	07/22/2020	Q/2020/7/FJ4WZ081Y	750,000.00	37,500.00	787,500.00	Pending		Clickon
020-07-22								

The system provide you Sales Quote Approval form

Sales Quotation - View Details								
VIEW INFORMATION								
Customer Number : C/2020/6/Y9M8P7E02		stomer Name : oomie Limited		Sale Opportunity No : 5/2020/8/38033902		Sale Opp Gas	ortunity :	
Quote No : Q/2020/8/QDNHPB4MP		p-Total : 1,000.00		Тах: 45,000.00		Total Am 945,000.00		
QUOTE ITEMS								
Filter: Type to filter	Q						Show:	10 ~
~	Product Name	Price 0	Quantity 0	Amount 0	Discount	Final Amount	Actions	¢
and the second second	Apple Mac Air	150,000.00	6	900,000.00	0.00	900,000.00	Details Update Remove	
Showing 1 to 1 of 1 entries							-	1 -
Approval Information								_
* Approval Type :								
Please Select			~					
Comments :				-				
Enter your description or notes	here							
				<i>h</i>			tivate Windows to Settings to activate Wir	ndows.
			Back to Pending Approval	List 💼 Approve	2 +			

Enter the necessary information and click on the Approve button

Sales Quotation - View Details									
VIEW INFORMATION									
Customer Number : C/2020/6/Y9M8P7E02		tomer Name : oomie Limited		Sale Opportunity No : 5/2020/8/38033902		Salı Gi	e Opportunity : as		
Quote No : Q/2020/8/QDNHPB4MP		9-Total : 1,000.00		Tax : 45,000.00			Total Amount : 945,000.00		
QUOTE ITEMS									
Filter: Type to filter	Q							Show:	10 ~
^	Product Name	Price 0	Quantity 0	Amount 0	Discount	Final Amount	\$	Actions	0
	Apple Mac Air	150,000.00	б	900,000.00	0.00	900,000.00		Details Update Remove	
Showing 1 to 1 of 1 entries								F	1 -
Approval Information									_
* Approval Type :									
Approved			v						
Comments :				_					
TEST				//				e Windows ings to activate Win	
			Back to Pending Approval	List 📫 Approve	±+			ings to activate will	

4.8 Quote Management

Create New Product Negotiation

			C Expe	cted Amount : 900.000.00 Created On : 8/4/2020	Q Customer Account : Door		Expected Close Date : Wednesday, 05 Au s Opportunity No : \$/2020/8/38033902	gust 2020		
	0 TOTAL MESSAGES		R	0.00 TOTAL SALES EXPENSES	Ê	Ŷ	0 cases	প্র		0 sales activities
Clickon create new		ty Management					-	Select an Action 💙	Change Sales Opportuni	ity Status 🗡
Product Negotiatio		Initiate		Qualify	Q	Jote	(Ø) Negotiate		5 Close	
		anagement Bi Greate New Product Negotia	ation							
		B Create New Service Negotian	5on							
									e Win dowy ings to activate V	Next →

The system provide you Sales Negotiation form

(Sales Opportunity Customer Accout : Doomie Limited Created On : 8/4/2020 Sales Opportu	Expected Close Date : 8/5/2020 12:00:00 AM
Sales Negotiation - Update		
ENTER YOUR INFORMATION		
Quote Number : Q/2020/8/QDNHPB4MP Amount : 945,000.0	0	
* Negotiation Date (MM/DD/YYYY) :	Negotiated Amount :	Negotiated Outcome :
Enter Scheduled Date	Enter Negotiated Amount	Please Select V
Feedback :	Attendeer	51
Enter your Feedback here	Enter y	rour Attendees here
		Back to List 💼 Submit Feedback 🖛

Enter the required information and click on Submit Feedback button

Sales Negotiation - Update	Customer Accout : Doomie Limited	Sales Opportunity : Gas Expected Amount : 90000 Expected of n: 8/4/2020 Sales Opportunity Satus : Pending	Close Date : 8/5/2020 12:00:00 AM	
ENTER YOUR INFORMATION				Clickonthe
Quote Number : Q/2020/8/QDNHPB4MP Amount : 94	5,000.00			Submit
* Negotiation Date (MM/DD/YYYY) :	Negotiated Amount :		Negotiated Outcome :	Feedback
08/05/2020	945000		Negotiation Completed	button
Feedback :		Attendees :		
Enter your Feedback here		Enter your Attendees here	Back to List	Salariti Fendinic. 14

4.9 Sales Opportunity Management Sales Closure->Close Sales

		Sales Opportunity : Gas Expected Amount : 900,000,00					
	0 TOTAL MESSAGES	0.00 TOTAL SALES EXPRESES	t 🕹	0 CASS	0 SALES ACTIVITIES		
	Sales Opportunity Management			Select an Action 💙	Change Sales Opportunity Status 🎽		
Clickon Close Sales	Initiate	Qualify	Quote	Negotiate	Close		
	Sales Closure Quote Number : Q/2020/B/QDN Umount : 945,000.00 81 Close Sales	HPE4MP					
					\\\$iPrevexws submatrom ◆ ings to activate Windows.		

The system provide you Sales Closure form

	Sales Opportunity : Gas G Expected Amount : 900.000.00 Q Customer Account : Gis E Expected Close Date : Wednesday, 05 August 2020 Created On: 8/4/2020 Sales Opportunity Sales : Pending Sales Opportunity No : S/2020/8/38033902	
Sales Closure	Back to	Sales Qualification
ENTER YOUR INFORMATION		
* Closure Status:	~	
* Actual Closed Date (MM/DD/YYYY) : Enter Sales Closure Date	Reference Number : Enter Reference No	
	Back to List 📸	Close Sales ≡+

Enter the required information and click on the Close Sales button

	Expected Amount : 900,000.00 Customer Account	Crtunity : Gas :: Gas :: Gas :: Sales Lead : Sales Opportunity No : \$/2020/8/38/33902		
Sales Closure			Back to Sales Qualification	
NTER YOUR INFORMATION			Clicko	on the
Closure Status:			Close	Sales
Sales Won	~		buttor	n
Actual Closed Date (MM/DD/YYYY) :		Reference Number :	L	
08/04/2020		ASDFGHU		
			Back to List 🧰 Close Sales 🖛	

Then the system provide you Sales Opportunity grids which indicate that the Sales Opportunity as been won

Sales Opportunity List										
Filter: doomie	Q								Sho	w: 10 ~
Customer Account ^	Opportunity No	Opportunity 0	Type 0	Expected Start Date	Expected End Date	Expected Amount 0	Actual End Date 0	Actual Amount 🛛 🗘	Status 0	Actions 0
Doomie Limited	5/2020/7/66403925	Not Applicable	Warm Opportunity	07/23/2020	7/31/2020 12:00:00 AM	70000		0	Pending	≣*
Doomie Limited	5/2020/7/95469297	footwears	Hot Opportunity	07/25/2020	7/31/2020 12:00:00 AM	500000		0	Pending	= -
Doomie Limited	5/2020/8/38033902	Gas	Hot Opportunity	08/03/2020	8/5/2020 12:00:00 AM	900000	08/04/2020	945000	Sales Won	_ ≡.
Showing 11 to 13 of 13 entrie	es (filtered from 114 total ent	ries)							-	1 2 →

5.0 Sales Management

Create Sales Opportunity->click on New Sales Opportunity



Then system provide you Sales Management grid click on New Sales Opportunity

Sales Management				
Sales Leads				
	Clickon New Sales	New Sales Lead	My Sales Leads	
Sales Opportunity	Opportunity	New Sales Opportunity	My Opportunities	
Sales Requirement				
		Requirements - Pending Approval		
Sales Expenses				
		My Pending Expenses	My Approved Expenses	My Rejected Expenses

The system provide you News Sales Opportunity form

New Sales Opportunity							
ENTER YOUR INFORMATION							
Create New Customer Account							
* Customer Acount :		* Opportunity Type:			* Transaction Type:		
Please Select	Ÿ	Please Select		~	Please Select		~
* Sales Opportunity :					* Expected Amount:		
Enter Sales Opportunity					Enter Sales Expected	Amount	
* Commencement Date (MM/DD/YYYY) :	* Expected Closed Date	(MM/DD/YYYY) :	* Currency :			Purchase Time Frame:	
Enter Commencement Date	Enter Expecte	ed Closed Date	Please Selec	t	÷	Please Select	*
Description / Notes :							
Enter your description or notes here							
			1				
						Back to List 💼	Create Opportunity ≡+

Enter the necessary information and click on Create Opportunity button

= ti ⁹			॥ ଛ ⁹	myseunbay@gmail.com ~
New Sales Opportunity				
ENTER YOUR INFORMATION				
Create New Customer Account 😡	* Opportunity Type:		* Transaction Type:	
Devcom Limited	Hot Opportunity		 New Business 	~
* Sales Opportunity :			* Expected Amount:	
footwears			1,350,000	Clickon the Create
* Commencement Date (MM/DD/YYYY) : O8/03/2020	* Expected Closed Date (MM/DD/YYYY) : 08/06/2020	* Currency : Naira	Purchase Time Frame:	Opportunitybutton
lescription / Notes : Enter your description or notes here			Back to List 💼	Create Opportunity #+

5.1 Quote Management

Create New Product Quote

	O TOTAL MESSAGES	0.00 TOTAL SALES EXPENSES	ا ل ا	0 CASES	0 SALES ACTIVITIES
	Sales Opportunity Management			Select an Actio	on 🎽 Change Sales Opportunity Status 🎽
Clickon New Product Quote	Initiate	Qualify	Quote	4 Negotiate	Gose
	Quotes Management	8			
	ES Create New Service Quot				
					◆ Previous Next ◆

The system provide you New Sales Quote form

	Sales Opportunity : footwears Customer Account : Devcom Limited
New Sales Quote	
ENTER YOUR INFORMATION	
* Due Date (MM/DD/YYYY) :	Quotation Type :
Enter Scheduled Date	Please Select V
Back 💼	Initiate Quote 🖋

Enter the necessary information and click on Initiate Quote button

	Sales Opportunity : footwears L Customer Account : Devcom Limited Q Quote No : Q/2020/A/B63WNE9GC	
r Sales Quote		
R YOUR INFORMATION		Clickon the
e Date (MM/DD/YYYY) : 08/04/2020	Quotation Type : Price Based	Initiate Quote
Back 💼		Initiate Quoter

Then the system provide you where you are to add the necessary information

	L Customer Acc	Sales Opportunity : footwears	NRASWINESOC	
New Sales Quote				
ENTER YOUR INFORMATION				
* Product :	Unit Price :	* Quantity :	* Amount :	
Please Select	✓ 150000	Enter Quantity	0	
* Applied Discount :	Final Amo	unt		
0	0.00			
Add New Item 🖋				

Enter the necessary information then click on the Add New Item button as it shown below

		(L Con	Sales Opportunity : footwears	SWNEGOC
	New Sales Quote			
Clickonthe	TER YOUR INFORMATION			
Add New Item	roduct : Apple Mac Air pplied Discount :	Unit Price :	* Quantity : Sinal Amount:	* Amount : 1350000
	Add New Item		135000.00	1

The system indicate that the quote item is added successfully

r. Type to filter	Q						Show	: 10 ~
A	Product Name 0	Price 0	Quantity 0	Amount 0	Discount	Final Amount 🗘	Actions	0
	Apple Mac Air	150,000.00	9	1,350,000.00	0.00	1,350,000.00	Details Update Remove	Clickonthe
ving 1 to 1 of 1 entries							-	complete button
T QUOTATION Sub-Total Amount : 1,	.350,000.00 Tax: 67,500.00 T	otal Amount : 1,417,500.00					L	
View Quote 🧰								

5.2 Quote Management

Click on Manage product Quote then the system will display sales quote grid show below

	0 Total messages	Q	0.00 Total sales expenses	Ĉ	Ł	0 Cases	প্ত	0 sales activities
s	Sales Opportunity Management						Select an Action V	– Change Sales Opportunity Status – 💉
Clickon the Manage Pro	-		Qualify	C C	Ø) uote	4 Negotiate		5 Close
Ouote	Quotes Nanagement	ct Quote 29 View Pro	duct Quote					
	Create New Se Quote Number : 0/2020// Amount : 1,417,500.00 Status : Pending							
								◆ Previous Next ◆

Click on the "Action in the grid to request for Approval

	Expected Amount : 1.35	Opportunity Opportant Opportant Opportant Opport Op	com Limited Expected	Close Date : Tuesday, 04 /	August 2020			
Sales Quote Filter: Type to filter Q							Bar	Clickon Request for
Customer Account	Sales Opportunity O	Sales Quote Number C	Total Amount 0	Тах 0	Final Amount 1,417,500.00	Status	0	Approval
Showing 1 to 1 of 1 entries						10		cord for Apploial for Discount

The system display that the request for approval as been sent successfully

Opportunity : footwears Expected Amount : 1350,000.00 Customer Account : Devcom Limited Customer Account : Devcom Limited Customer Account : Devcom Limited Customer Account : Devcom Limited <t< th=""></t<>										
Sales Quote									Back	to Sales Qualification
	for approval successfully !									× Show: 10 ×
Customer Account ^	Sales Opportunity 0	Sales Quote Number	0	Total Amount 0	Тах	0	Final Amount	Status	¢	Actions 0
Devcom Limited	footwears	Q/2020/8/B63WNE9GC		1,350,000.00	67,500.00		1,417,500.00	Pending Approval - Junior Approval Role		≡-
Showing 1 to 1 of 1 entries										⊢ 1 →

5.3 Product Quotation Approval Pending List

Click on Approvals ->Pending Approval



Junior Approval Role I -> click on "Action" icon in the grid in order to approve pending Sales Quote

≡ ti ⁹ onn						୍	bamisondads@gmail.co	m ~
Sales Quotes Approval - Pendir View Records	ng List							•
Home / Transaction / Sales Quotes							Actions	5 v
Sales Quotation Approval - Pending								
ilter: Type to filter Q							Show: 10	~
ransaction Date ^	Due Date 0	Sales Quote Number	Total Amount	Tax O	Final Amount	Status 0	Actions	Clickon
1020-07-21	07/22/2020	Q/2020/7/10ZBHQQLW	150,000.00	7,500.00	157,500.00	Pending	≡-	Approve
8/2/2020	08/04/2020	Q/2020/8/W8MBB1XMK	700,000.00	35,000.00	735,000.00	Pending	≡-	Record
3/4/2020	08/05/2020	Q/2020/8/QDNHPB4MP	900,000.00	45,000.00	945,000.00	Pending	≡-	
8/6/2020	08/04/2020	Q/2020/8/B63WNE9GC	1,350,000.00	67,500.00	1,417,500.00	Pending	=-	
Showing 1 to 4 of 4 entries						I Vie	w Record prove Record	

The system provide you Sales Quote Approval form

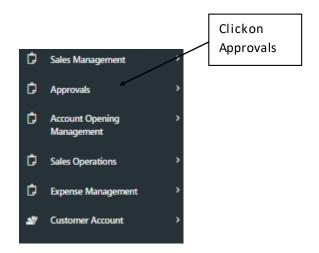
Sales Quotation - View Details								
VIEW INFORMATION								
Customer Number : C/2020/5/WF8YCWC20		stomer Name : Devcom Limited		Sale Opportunity No : 5/2020/8/16806186		Sale Oppo footwear		
Quote No : Q/2020/8/863WNE9GC		b-Total : 50,000.00		Tax : 67,500.00		Total Amo 1,417,500.0		
QUOTE ITEMS								
Filter: Type to filter	Q						Sho	w: 10 ~
^	Product Name	Price 0	Quantity 0	Amount 0	Discount	Final Amount	Actions	0
	Apple Mac Air	150,000.00	9	1,350,000.00	0.00	1,350,000.00	Details Update Remove	I
Showing 1 to 1 of 1 entries								- 1 -
Approval Information								
* Approval Type :								
Please Select								
Comments :				-				
Enter your description or notes	here			<i>li</i>			tivate Windows to Settings to activate W	indows.
			Back to Pending Approval	List 🧰 Approve	≡+			

Enter the necessary information and click on the Approve button

Sales Quotation - View Details	3						
VIEW INFORMATION							
Customer Number : C/2020/5/WF8YCWC20		stomer Name : Devcom Limited		Sale Opportunity No : S/2020/8/16806186		Sale Oppor footwears	
Quote No : Q/2020/8/B63WNE9GC		b-Total : 50,000.00		Tax : 67,500.00		Total Amou 1,417,500.00	
QUOTE ITEMS							
Filter: Type to filter	٩						Show: 10 ~
^	Product Name	Price 0	Quantity 0	Amount 0	Discount	Final Amount 🗘	Actions 0
-	Apple Mac Air	150,000.00	9	1,350,000.00	0.00	1,350,000.00	Details Update Remove
Showing 1 to 1 of 1 entries							- 1 -
Approval Information							7
* Approval Type :					Cli	ckon the	
Approved				~	Ap	prove button	
Comments :				_	<u>بر</u>	•	
TEST					/		tivate Windows to Settings to activate Windows.
			Back to Pending Approval	List 💼 Approve	±+		

5.4 Product Quotation Approval Pending List

Click on Approvals ->Pending Approval



Junior Approval Role II -> click on "Action" icon in the grid in order to approve pending Sales Quote

≡ 11 ⁹ ∞∞∞									**	ନ୍ଟ୍ 🌒	myseunbay@gmail.com ∨
Sales Quotes Approval - Pend View Records	ling List										٠
Home / Transaction / Sales Quotes	5										Actions ~
Sales Quotation Approval - Pending											
Filter: Type to filter Q											Show In V
Transaction Date	Due Date	Sales Quote Number	٥	Total Amount	0	Тах	0	Final Amount	Status	0	Click on the Approve Reco
2020-07-22	07/22/2020	Q/2020/7/FJ4WZ081Y		750,000.00		37,500.00		787,500.00	Pending		
8/6/2020	08/04/2020	Q/2020/8/863WNE9GC		1,350,000.00		67,500.00		1,417,500.00	Pending		=
Showing 1 to 2 of 2 entries										C View	Record 1

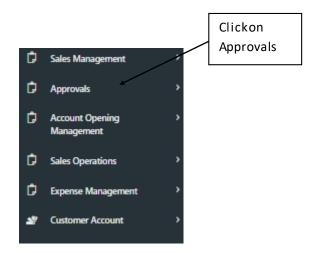
Sales Quotation - View Detail	s							
VIEW INFORMATION								
Customer Number : C/2020/5/WF8YCWC20		stomer Name : levcom Limited		Sale Opportunity No : 5/2020/8/16806186		Sale Oppo footwear:		
Quote No : Q/2020/8/863WNE9GC		b-Total : 50,000.00		Tax : 67,500.00		Total Amo 1,417,500.0		
QUOTE ITEMS								
Filter: Type to filter	Q						Show,	10 ~
^	Product Name	Price 0	Quantity 0	Amount 0	Discount	Final Amount 0	Actions	0
	Apple Mac Air	150,000.00	9	1,350,000.00	0.00	1,350,000.00	[Details Update [Remove]	
Showing 1 to 1 of 1 entries							-	1 -
Approval Information								
* Approval Type :								
Please Select				•				
Comments :				_				
Enter your description or note	s here							
				10			tivate Windows to Settings to activate Win	dows.
			Back to Pending Approval	List 🧰 Approve	≣+		-	

Enter the necessary information and click on the Approve button

Sales Quotation - View Details									
VIEW INFORMATION									
Customer Number : C/2020/5/WF8YCWC20		stomer Name : Nevcom Limited		Sale Opportunity No : 5/2020/8/16806186			Sale Opportunity : footwears		
Quote No : Q/2020/8/863WNE9GC		b-Total : 50,000.00		Tax : 67,500.00			tal Amount : 417,500.00		
QUOTE ITEMS									
Filter: Type to filter	Q							Show:	10 ~
^	Product Name	Price 0	Quantity 0	Amount	C Discount	Final Amount	\$	Actions	0
	Apple Mac Air	150,000.00	9	1,350,000.00	0.00	1,350,000.00		Details Update Remove	
Showing 1 to 1 of 1 entries								÷	1 -
Approval Information									
* Approval Type :					Clickor	the			
Approved Comments :				~	Approv	e			
TEST					button				
								e Windows ings to activate Win	
			Back to Pending Approval	I List 🧰 Appro	we ≣+			2	

5.5 Product Quotation Approval Pending List

Click on Approvals ->Pending Approval



Senior Approval Role I -> click on "Action" icon in the grid in order to approve pending Sales Quote

Sales Quotes Approval - Pend View Records	ing List								•
Home / Transaction / Sales Quotes								A	ictions \lor
les Quotation Approval - Pending								r	
ter: Type to filter Q								Show:	Clickon the Approve
ansaction Date	Due Date 0	Sales Quote Number	Total Amount	Tax 0	Final Amount	Status	0	Actions	Record

Sales Quotation - View Details	5							
VIEW INFORMATION								
Customer Number : C/2020/5/WF8YCWC20		stomer Name : levcom Limited		Sale Opportunity No : 5/2020/8/16806186		Sale Oppo footwear		
Quote No : Q/2020/8/863WNE9GC		b-Total : 50,000.00		Tax : 67,500.00		Total Amo 1,417,500		
QUOTE ITEMS								
Filter: Type to filter	Q						Show:	10 ~
^	Product Name	Price 0	Quantity 0	Amount 0	Discount	Final Amount	Actions	\$
-	Apple Mac Air	150,000.00	9	1,350,000.00	0.00	1,350,000.00	Details Update Remove	
Showing 1 to 1 of 1 entries							-	1 →
Approval Information								
* Approval Type :								
Please Select				Ψ.				
Comments :				-				
Enter your description or notes	s here							
				1.			tivate Windows to Settings to activate Win	dows
			Back to Pending Approva	List 💼 Approve	2 +		to betangs to delivate win	

Enter the necessary information and click on the Approve button

Sales Quotation - View Details								
VIEW INFORMATION								
Customer Number : C/2020/5/WF8YCWC20	Customer Name : Devcom Limited		Sale Opportunity No : 5/2020/8/16806186			le Opportunity : ootwears		
Quote No : Q/2020/8/863WNE9GC	Sub-Total : 1,350,000.00		Tax : 67,500.00			tal Amount : 117,500.00		
QUOTE ITEMS								
Filter: Type to filter Q							Show:	10 ~
Product Name	≎ Price ≎	Quantity 0	Amount 0	Discount	Final Amount	\$	Actions	0
Apple Mac Air	150,000.00	9	1,350,000.00	0.00	1,350,000.00		Details Update Remove	
Showing 1 to 1 of 1 entries							-	1 -
Approval Information						_		_
* Approval Type :				C	lickonthe			
Approved			•		Approve			
Comments :					outton			
TEST								
			1.	/			e Windows ings to activate Win	dows.
		Back to Pending Approval	List 🧰 Approve	=+				

5.6 Product Quotation Approval Pending List

Click on Approvals ->Pending Approval



Senior Approval Role II-> click on "Action" icon in the grid in order to approve pending Sales Quote

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Sales Quotes Approval - Pendia View Records	ng List						•	
Home / Transaction / Sales Quotes							Actions \sim	
Sales Quotation Approval - Pending								
Filter: Type to filter Q							Show: 10 ~	Clickon
ransaction Date	Due Date 0	Sales Quote Number \bigcirc	Total Amount	Tax 0	Final Amount	Status 0	Actions	Approve
020-07-22	07/22/2020	Q/2020/7/FJ4WZ081Y	750,000.00	37,500.00	787,500.00	Pending	≡-	Record
8/6/2020	08/04/2020	Q/2020/8/863WNE9GC	1,350,000.00	67,500.00	1,417,500.00	Pending	=-	
Showing 1 to 2 of 2 entries							View Record 1 →	

Sales Quotation - View Details	:							
VIEW INFORMATION								
Customer Number : C/2020/5/WF8YCWC20		stomer Name : levcom Limited		Sale Opportunity No : 5/2020/8/16806186)pportunity : wears	
Quote No : Q/2020/8/863WNE9GC		b-Total : 50,000.00		Tax : 67,500.00			Amount : 500.00	
QUOTE ITEMS								
Filter: Type to filter	Q							Show: 10 ~
~	Product Name	Price 0	Quantity \Diamond	Amount 0	Discount	Final Amount	Actions	¢
	Apple Mac Air	150,000.00	9	1,350,000.00	0.00	1,350,000.00	Details Update R	amove
Showing 1 to 1 of 1 entries								⊢ 1 →
Approval Information								
* Approval Type :								
Please Select				~				
Comments :								
Enter your description or notes	; here			11			Activate Windows Go to Settings to activat	
			Back to Pending Approval	List 💼 Approve	=+		-	

Enter the necessary information and click on the Approve button

Sales Quotation - View Details								
VIEW INFORMATION								
Customer Number : C/2020/5/WF8YCWC20		stomer Name : Devcom Limited		Sale Opportunity No : 5/2020/8/16806186			ale Opportunity : footwears	
Quote No : Q/2020/8/863WNE9GC		b-Total : 50,000.00		Tax : 67,500.00			otal Amount : 417,500.00	
QUOTE ITEMS								
Filter: Type to filter Q.								Show: 10 ~
^	Product Name	Price 0	Quantity 0	Amount 0	Discount	Final Amount	Actions	0
	Apple Mac Air	150,000.00	9	1,350,000.00	0.00	1,350,000.00	Details Update R	emove
Showing 1 to 1 of 1 entries								- 1 →
Approval Information								_
* Approval Type :						Clickon		
Approved Comments :						the		
TEST						Approve		
						button	Activate Windows	
			Back to Pending Approval	List 💼 Approve			Go to Settings to activat	e Windows.

5.7 Product Quotation Approval Pending List

Click on Approvals ->Pending Approval



Senior Approval Role III-> click on "Action" icon in the grid in order to approve pending Sales Quote

≡ th ⁹ ∞									**	ନ୍ <mark>ଥି 🌒</mark>	bamisondads4@gmai	il.com ~
Sales Quotes Approval - Pendir View Records	ng List											•
Home / Transaction / Sales Quotes											Acti	ions ~
Sales Quotation Approval - Pending												
Filter: Type to filter Q											Show: 10	Clickon
Transaction Date	Due Date	Sales Quote Number	≎ Tot	al Amount	0	Тах	0	Final Amount	Status	\$	Actions	Approve Record
8/6/2020	08/04/2020	Q/2020/8/863WNE9GC	1,3	50,000.00		67,500.00		1,417,500.00	Pending		≡-	Record
Showing 1 to 1 of 1 entries											ew Record pprove Record	-

Sales Quotation - View Details									
Customer Number : C/2020/5/WF8YCWC20		stomer Name : Devcom Limited		Sale Opportunity No : 5/2020/8/16806186		Sale Oppo footwear:			
Quote No : Q/2020/8/863WNE9GC		b-Total : 150,000.00		Tax : 67,500.00		Total Amo 1,417,500.0			
QUOTE ITEMS									
Filter: Type to filter	Q							Show:	10 ~
^	Product Name	Price 0	Quantity 0	Amount 0	Discount	Final Amount 0	Actions		0
	Apple Mac Air	150,000.00	9	1,350,000.00	0.00	1,350,000.00	Details Update Re	move	
Showing 1 to 1 of 1 entries		1		1	1	1	1	-	1 -
Approval Information									
* Approval Type :									
Please Select				v					
Comments : Enter your description or notes he	re								
				<i>//</i>			tivate Windows to Settings to activat	e Wind	ows.
			Back to Pending Approva	I List 🧰 Approve	=+				

Enter the necessary information and click on the Approve button

	Sales Quotation - View Details							
	VIEW INFORMATION							
	Customer Number : C/2020/5/WF8YCWC20		istomer Name : Devcom Limited		Sale Opportunity No : 5/2020/8/16806186		Sale Opp footwea	
	Quote No : Q/2020/8/863WNE9GC		Ib-Total : 350,000.00		Tax : 67,500.00		Total Am 1,417,500	
	QUOTE ITEMS							
	Filter: Type to filter	٩						Show: 10 Y
	^	Product Name	Price 0	Quantity \Diamond	Amount 0	Discount	Final Amount	Actions \Diamond
		Apple Mac Air	150,000.00	9	1,350,000.00	0.00	1,350,000.00	Details Update Remove
	Showing 1 to 1 of 1 entries							- 1 -
	Approval Information						Clickonthe	
	* Approval Type : Approved			÷			Approve	
	Comments :						button	
	TEST							
								ctivate Windows to Settings to activate Windows.
				Back to Pending Approval L	ist 💼 Approve 3	E+		
				m	п			`
	0 TOTAL MESSAGES	Q,	0.00 TOTAL SALES EXPENSES	Ĉ	<i>₽</i>		0 cases	0 SALES ACTIVITIES
	Sales Opportunity Manageme	ent					Select an Ac	tion 🎽 Change Sales Opportunity Status 🎽
Clickon Create			Qualify		Quote		Negotiate	5 Close
Product Negot								
	vienes vilanagement							
	ES Create Nev	v Product Negotiation						
	25 Create Nev	v Service Negotiation						
								◆ Previous Next ◆

Then system provide you Sales Negotiation form

	Sales Opportunity	
(a	Customer Accout : Devcom Limited	
	Created On : 8/6/2020 Sales Opp	ortunity status : Hending
Sales Negotiation - Update		
ENTER YOUR INFORMATION		
Quote Number : Q/2020/8/B63WNE9GC Amount : 1,417,500.	00	
* Negotiation Date (MM/DD/YYYY) :	Negotiated Amount :	Negotiated Outcome :
Enter Scheduled Date	Enter Negotiated Amount	Please Select
Feedback :	Atten	dees :
Enter your Feedback here	En	ter your Attendees here
		Eack to List 💼 Submit Feedback: #+

Enter the necessary information and click on Submit Feedback

	Sales Opportunity Customer Accout : Devcom Limited		
	Created On : 8/6/2020 Sales Op	portunity Status : Pending	
Sales Negotiation - Update			
ENTER YOUR INFORMATION			
Quote Number : Q/2020/8/863WNE9GC Amount : 1,417,500.	00		Clickon the
Negotiation Date (MM/DD/YYYY) :	Negotiated Amount : 1417500	Negotiated Outcome : Negotiation Completed	submit Feedback button
Feedback : Enter your Feedback here		ndees : nter your Attendees here	
		Back to Li	st 🧰 Submit Feedback 🖛

The system indicate that negotiation as been successfully made

	0 TOTAL MESSAGES		ال	0 CASS	0 sales activities
	Sales Opportunity Management			Select an Action -	- Y Change Sales Opportunity Status Y
	Initiate	Qualify	Quote	Negotiate	Gose
Negotiation details	Quotes Management B3 Manage Product Neg	pólation			
shown	El Create New Service N Date : 08/04/2020 Amount : 1.4	Ingotiation 117,500.00 Outcome : Negotiation Completed			
					Previous Next

5.8 Sales Opportunity Management

Sales Closure

Click on Close Sales

	O TOTAL MESSAGES	Q	0.00 Total sales expenses	Ď	P	0 cases	প্র		0 sales activities
	Sales Opportunity Management					Sele	ct an Action 🗡	Change Sales Oppo	ortunity Status 🗡
	Initiate		Qualify	Quote		Negotiate		Close)
Click on			Quality	Cuore		rregonate		Close	
Close Sale	Sales Closure								
	Quote Number : Q/2020/8 Smount : 1,417,500.00	8/B63WNE9GC							
	EXI Close Sales								
								+ Previous	Submit form 🔶

The system provide you Sales Closure form

	Expected Amount : 1,350,000.00	rtunity : footwears unt : footwears Expected Close Date : Tuesday, 04 August 2020 drig Sales Lead : Sales Opportunity No : \$22020/8/16808186	
Sales Closure			Back to Sales Qualification
ENTER YOUR INFORMATION			
* Closure Status: Please Select		×	
* Actual Closed Date (MM/DD/YYYY) : Enter Sales Closure Date		Reference Number : Enter Reference No	
Name of Competitor lost to": Name of the competitor		Last Reason Comments : Enter your description or notes here	
		Back to	List 💼 Close Sales 🖛

Enter the required information and click on the Close Sales button

	Expected Amount : 1,350,000,00 Greated On : 2/6/2020 5	Sales Opportunity : 1 Q Customer Account : footwear Sales Opportunity Status : Pending Sales	Expected Close Date : Tu			
iales Closure					Back to Sales	Qualification
NTER YOUR INFORMATION						Clickonthe
Closure Status:						Clickonthe
Sales Won		~				Close Sales
Actual Closed Date (MM/DD/YYYY) :		Referen	e Number :			button
08/05/2020		asdfg	njid			
				Back to L	ist 🧰 🛛 Clo	ose Sales ≡+

Then the system provide you Sales Opportunity grids which indicate that the Sales Opportunity as been won

Sales Opportunity List										
Filter: DEVCOM Q Show: 10 *										
Customer Account ^	Opportunity No	Opportunity 0	Type 0	Expected Start Date	Expected End Date	Expected Amount 0	Actual End Date 0	Actual Amount 0	Status 0	Actions 0
Devcom Limited	5/2020/7/96042081	Diesel Supply	Warm Opportunity	07/22/2020	7/31/2020 12:00:00 AM	350000		0	Pending	≡-
Devcom Limited	5/2020/7/83308811	Gas	Warm Opportunity	07/27/2020	8/1/2020 12:00:00 AM	400000		0	Pending	≡-
Devcom Limited	5/2020/8/74266058	footwears	Hot Opportunity	08/03/2020	8/6/2020 12:00:00 AM	1350000		0	Pending	≡-
Devcom Limited	5/2020/8/16806186	footwears	Hot Opportunity	08/01/2020	8/4/2020 12:00:00 AM	1350000	08/05/2020	1417500	Sales Won	≡-

5.8 Sales Expense

Create Sales Expense->Click on Sales Expense

	Expected Amount : 13,000,000,00 Greated On : 2020-07-07	Sales Opportunity : Gas supply Q Customer Account : Billux Nigeria Limited Image: Comportunity Status : Pending Sales Lead: Sales Opportunity Status : Pending Sales Status : Pe	Expected Close Date : Friday, 24 July 2020	
O TOTAL MESSAGES		t de la constante de la consta	<u>ک</u>	Click on the create
Sales Opportunity Management	2	3	Select an Action × Change	expense button
Initiana Actions	Qualify	Quote	View Documents Create Activity Manage Activity	Close
Customer Account			Create an Expense Manage Expense Create a Case 🗸	
Manage Customer Account - View Account		Customer Account created suc	ccessfully!	
		Customer Account Name : Billu	ux Nigeria Limited. Activate Wind Go to Settings to	

The system provide you Sales Expenses form

	Sales Opportunity : Gas supply	
Sales Expenses	Back to Sales Qualificatio	
ENTER YOUR INFORMATION		
Sales Expense Title :		
Expense Date (MM/DD/YYYY) :	Expense Amount :	
Enter Expense Date		Click on the
Upload Image/Document No file selected	Choose File	submit
Description :		button
Enter your description here		
Back to List 💼	Activate Windows	
	Go to Sattings to activate Windows	

Enter the required information and click on the submit button

	Sales Opportunity : Gas supply	
Sales Expenses	Back to Sales Qualificatio	n
ENTER YOUR INFORMATION		
Sales Expense Title :		
transportation		
Expense Date (MM/DD/YYYY) :	Expense Amount :	
08/06/2020	15,000	
Upload Image/Document		Click on the
JULY REPORT 2019.xlsx	Choose File	
Description :		submit
Enter your description here		button
		<u></u>
Back to List 💼	Activate Windows	

	8 Ext	ected Amount : 13,000.000.00	Sales Opportun		Expected Close Date : Friday, 24 July	2020	
					Opportunity No : 5/2020/7/19610724		
0 TOTAL MESSAGES	Q	15,000.00 total sales edgenses	Ĉ	Ł	0 cases	প্র	0 Sales activities
Sales Opportunity Management					Sele	tt an Action 💉	Change Sales Opportunity Status 🎽
Initiate		2 Qualify	(ii Qu		4 Negoriate		5 Close
Actions							
Customer Account							
Manage Customer Account - Vi	ew Account			Customer Account crea	ted successfully!		
				Customer Account Nan	ne : Billux Nigeria Limited .		Windows

Then the system provide you Sales Opportunity grids which indicate that the expense has been recorded

Sales Opportunity : Gas supply							
Sales Expense List				1	Create New Expense	Back to Sales Opportunity	
Filter: Type to filter Q.						Show: 10 ×	
Expense No ^	Expense 0	Expense Date	Amount 0	Created On	Status	Actions 0	
E/2020/8/2855257	transportation	Thursday, 06 August 2020	15000	8/6/2020	Pending Approval	≡.	
Showing 1 to 1 of 1 entries						- 1 -	

	Opportunity : Gas supply Gast Expected Amount : 13,000,000,00 Qastroner Account : Billion Nigeria Limited Created On : 2020-07-07 Sales Opportunity Status : Pending Poporta	El Expected Close Date : Friday, 24 July 2020	
Sales Expense Detail		Back to Pending Sales Expe	ense List
VIEW INFORMATION			
Expense Title: transportation	Expense Number: E/2020/8/2855257		
Expense Amount: 15000	Expense Date: 8/6/2020	Status : Pending Approval	
Description :			
UPLOADS			
Uploaded Documents			

5.9 Approval Sales Expense

Click on approval button

	Approvals >	a monoming a defension	гарталык текаригы тынк		
	Account Opening >				
	Management	Product Quotation Approval			
	Sales Operations >	Pending Approval	Approved Quotation		
	Expense Management >				
	▲ Customer Account >	Service Quotation Approval			
Click on	SETUP	Pending Approval	Approved Quotation		
	💓 Corporate Setup >				
sales	₩ Budget Setup >	Product Discount Approval			
expense	₩ Product Setup >	Pending Approval	Approved Discount		
	₩ Service Setup >				
approval	₩ Sales Setup >	Service Discount Approval			
	Product Pricing	Pending Approval	Approved Discount		
	₩ Employee Setup >				
	₩ Logistics Company Setup >	Sales - Expense Approval			
	Finance Operations Setup >	Pending Expense Requests	Approved Expenses	Rejected Expenses	
	PARTNERS				
	III Partner Management >	Sales - Case Management			
	୍ଲ୍ Account Management >	Pending Cases	Resolved Cases		
	କ୍ଲି System Administration >				A A//

Sales Expense - Pending Approval L View Records	ist					
♠ Home / Sales Management / Sales E	ixpense					Actions \sim
Sales Expense List						
Filter: Type to filter Q.						Show: 10 Y
Expense No ^	Expense \Diamond	Expense Date	Amount 0	Created On	Status	Actions 0
E/2020/7/1529992	Feeding Expense	7/2/2020 12:00:00 AM	150000	2020-07-02	Pending Approval	≡-
E/2020/7/1600140	Feeding Expense	7/2/2020 12:00:00 AM	300000	2020-07-02	Pending Approval	≡-
E/2020/7/3409962	Dinner Outing with CEO	7/15/2020 12:00:00 AM	50000	2020-07-15	Pending Approval	≡-
E/2020/7/6854381	test expense	7/13/2020 12:00:00 AM	150000	2020-07-12	Pending Approval	≡-
E/2020/7/8138993	yomi feeding expense	7/7/2020 12:00:00 AM	300000	2020-07-07	Pending Approval	≡-
E/2020/7/9378335	Feeding Expense	7/21/2020 12:00:00 AM	11500	2020-07-21	Pending Approval	≡-
E/2020/8/2855257	transportation	8/6/2020 12:00:00 AM	15000	8/6/2020 Activat	Pending te Approval d c	≡- DWS

Then the system provide you Sales expense- pending approval list

Sales Expense - Pending Approval Li View Records Home / Sales Management / Sales Exp						Actions \sim	
Sales Expense List Filter: Type to filter. Q						Show: 10 ~	Click on the review
Expense No ^	Expense \bigcirc	Expense Date	Amount 0	Created On 0	Status	Actions $\hat{\cdot}$	button
E/2020/7/1529992	Feeding Expense	7/2/2020 12:00:00 AM	150000	2020-07-02	Pending Approval	=	
E/2020/7/1600140	Feeding Expense	7/2/2020 12:00:00 AM	300000	2020-07-02	Pe Ap 📼 Rev	v Details	
E/2020/7/3409962	Dinner Outing with CEO	7/15/2020 12:00:00 AM	50000	2020-07-15	Pending Approval	≡-	
E/2020/7/6854381	test expense	7/13/2020 12:00:00 AM	150000	2020-07-12	Pending Approval	≡-	
E/2020/7/8138993	yomi feeding expense	7/7/2020 12:00:00 AM	300000	2020-07-07	Pending Approval	≡-	
E/2020/7/9378335	Feeding Expense	7/21/2020 12:00:00 AM	11500	2020-07-21	Pending Approval	≡-	
E/2020/8/2855257	transportation	8/6/2020 12:00:00 AM	15000	^{8/6/2020} Activat		≡ - DWS	

	Sales Opportunity : Gas supply Expected Amount : 13.000.000.00 Casted On: 8/6/2020 Created On: 8/6/2020 Expected Close Date : Friday, 24 July 2020 Casted On: 8/6/2020	
Sales Expenses		
VIEW INFORMATION		
Sales Expense Title : transportation Expense Date (MM/DD/YYYY) : 8/6/2020	Expense Amount : 15000	
Description : Description :		
Upload Image/Document Uploaded Documents		
SUBMIT REVIEW		Click on
* Approval Status : Please Select	v]	the submit
Notes :		button
Enter your feedback or notes here	Activate Windows	
Back to List 🕋	Go to Settings to activate Submit	

Enter the required information and click on the submit button

	Sales Opportunity : Gas supply Image: Colspan="2">Colspan="2">Sales Opportunity : Gas supply Image: Colspan="2">Colspan="2" Colspan="2">Colspan="2">Colspan="2">Colspan="2" Colspan="2">Colspan="2">Colspan="2" Colspan="2">Colspan="2">Colspan="2" Colspan="2">Colspan="2" Colspan="2" Colspan="2" Colspan="2" Colspan="2" Colspan="2" Colspan="2" Colspa="2" Colspan="2" <t< th=""><th></th></t<>	
Sales Expenses		
VIEW INFORMATION		
Sales Expense Title : transportation Expense Date (MM/DD/YYYY) : 8/6/2020 Description : Description :	Expense Amount : 15000	
Upload Image/Document Uploaded Documents		
SUBMIT REVIEW		Click on
* Approval Status :		the submit
Approved Notes :	~	button
approve	Activate Windows	,
Back to List 💼	Go to Settings to activate the state of the set of the	

Sales Opportunity : Gas supply See Expected Amount : 13.000.000.00 Q Customer Account : Billux Nigeria Limited Expected Close Date : Friday, 24 July 2020 Created On: 2020-07-07 Sales Opportunity Status : Rending							
Sales Expense List				Cr	eate New Expense	Back to Sales Opportunity	
Filter: Type to filter Q						Show: 10 ~	
Expense No	Expense 0	Expense Date	Amount 0	Created On	Status	Actions 0	
E/2020/8/2855257	transportation	Thursday, 06 August 2020	15000	8/6/2020	Approved	≡-	
Showing 1 to 1 of 1 entries						- 1 -	

Then the system provide you Sales Opportunity grids which indicate that the expense has been approved

6.0 Sales Case

Click on create case

Sales Opportunity : Gas supply R Expected Amount : 13.000.000.00 Q Customer Account : Billux Nigeria Limited Ell Expected Close Date : Friday, 24 July 2020 Created On: 2020-07-07 Sales Opportunity Status : Pending Sales Lead: Sales Opportunity No : S/2020/7/19610724									
O TOTAL MESSAGES	Q	15,000.00 total sales edgenses	Ê	Ł	(Case		0 sales activities		
Sales Opportunity Management		2	3		4-	Select an Action V Chang	e Sales O Click on create		
Actions		Qualify	Quo	te		Create Activity Manage Activity Create an Expense			
Customer Account						Manage Expense Create a Case			
Manage Customer Accour	nt - View Account			Customer Account creat		Activate Win	dows activate Windows		

Then the system provide you Case Management form

ase Management						
					Back to Sales Qualification	
NTER YOUR INFORMATION						
ase Title :						
ncident Date (MM/DD/YYYY) :	Priority :		Sev	verity :		
Enter Incident Date		e Select		Please Select	~	Click on t
ssigned To : Please Select Nescription :		~				submit button
Enter your description here Back to List					Submit 🖪	

Enter the required information and click on the submit button

	Expected Amount : 13,000,000.00	Sales Opportunity : Gas supp Q Customer Account : Billiux Nigeria Limited Created On : 2020-07-07 Sales Opportunity Status	Expected Close Date : Friday,	.24 July 2020	
Case Management				Back to Sales Qualification	
ENTER YOUR INFORMATION					
Case Title :					
sick					
Incident Date (MM/DD/YYYY) :	Priorit	ty :	Severity :		r
08/06/2020	Crit	tical	~ Moderate	*	Clickonthe
Assigned To :					submit
Back Office		~			
Description :					button
sick					/
					,
Back to List 💼				Activate Windows	

After entering the necessary information the system takes you to a page where you are to add Document

	Sales Opportunity : Gas supply
Case Management - Attachment	
ENTER YOUR INFORMATION	
Document Title :	
Upload Image/Document	
No file selected	Choose File
Description :	
Enter your description here	
Back to List 💼	Submit 🛷

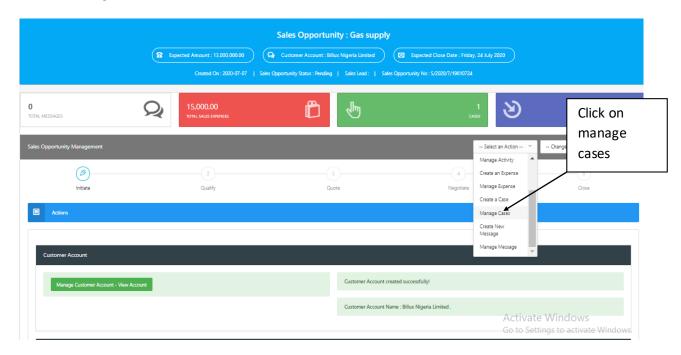
Enter the required Document and click on the submit button

	Sales Opportunity : Gas supply	
Case Management - Attachment INTER YOUR INFORMATION Document Title : Hospital receipt		
Upload Image/Document Trunes Software Licensertf Description : bad	Choose File	Clickon the submit button
Back to List 🕋	Su	

The system indicte that the Information-Record was added successfully shown below

(Exp	vected Amount : 13,000,000.00	Q	Sales Opportunity : Gas supply Customer Account : Billox Nigeria Limited d On : 2020-07-07 Sales Opportunity Status : Per Case Title : sick		Expected Close Date : Friday	, 24 July 2020			
Sales - Case Attachment List							Create New Attachr	nent View Case	Back to Sales O	pportunity ×
Filter: Type to filter Q									Show:	10 ~
Case Number	^	Case Title	÷	Document Title	0	Created On	÷	Status	÷	Actions
case Number										

Click on Manage Case to view details shown below



Click on the View Details in the "Action" grid in order to update

	(B Ex	pected Amount : 13000000) (1	Customer	Account	Dortunity : (t : Billux Nigeria L D7 Sales Opp	Limited		xpected Close Date : 7	7/24/2020	0 12:00:00 AM					
Sales - Case Management List													Great	e New Case	Back to S	ales Opportunity	
Filter: Type to filter Q															S	5how: 10 ~	Click on the
Case Number ^	Case Title	0	Incident Date	÷	Priority	0	Severity	0	Closed Date	Assigned To	¢	Created On	0	Status	0	Actions	view detail
Case/2020/8/359267372	sick		8/6/2020 12:00:00 AM		Critical		Moderate		1/1/0001 12:00:00 AM	Back Office		8/6/2020		Pending	View Detail		
Showing 1 to 1 of 1 entries															Edit Record	-	

Click on the view Attachment button in order to view if the case is uploaded

		Sales Opportunity : Gas sup C Expected Amount : 13.000.000.00 Q: Customer Account : Billux Nigeria Limited Created On : 2020-07-07 Sales Opportunity Statu Case Title : sick	Expected Close Date : Friday, 24 July 2020
	Sales - Case Management Detail		Back to Case Management List Back to Sales Qualification
	VIEW INFORMATION		
Clickonthe	lumber : Case/2020/8/359267372	Case Title : sick ViewBag.OpenDate	Incident Date : Thursday, 06 August 2020
View	y : Critical	Severity : Moderate	Closed Date :
-	ed To : Back Office	Escalated To :	Escalated On :
Attachment	: Pending	Is Due?:	Assigned By : myseunbay@gmail.com
button	d on : 8/6/2020		
	Description : sick		
	View Attachment(s)		Activate Windows

The system provide you Case Management uploaded grid shown below

	8 Exp	ected Amount : 13,000,000,00	ହ	Sales Opportunity : Gas supply Customer Account : Billux Nigeria Limited d On : 2020-07-07 Sales Opportunity Status : Pendl Case Title : sick		Spected Close Date : Friday, 24 July 202	•			
Sales - Case Attachment List						Create Nev	w Attachm	ent View Case	Back to Sales C	pportunity
Filter: Type to filter Q.									Show:	10 ~
						Created On	0	Status	0	Actions
Case Number	^	Case Title	0	Document Title	0	created on				