Sales pro module

Sales support

CAS Software AG

CAS-Weg 1 – 5

76131 Karlsruhe, Germany

0721 9638 - 0

info@cas.de

http://www.cas-crm.com/

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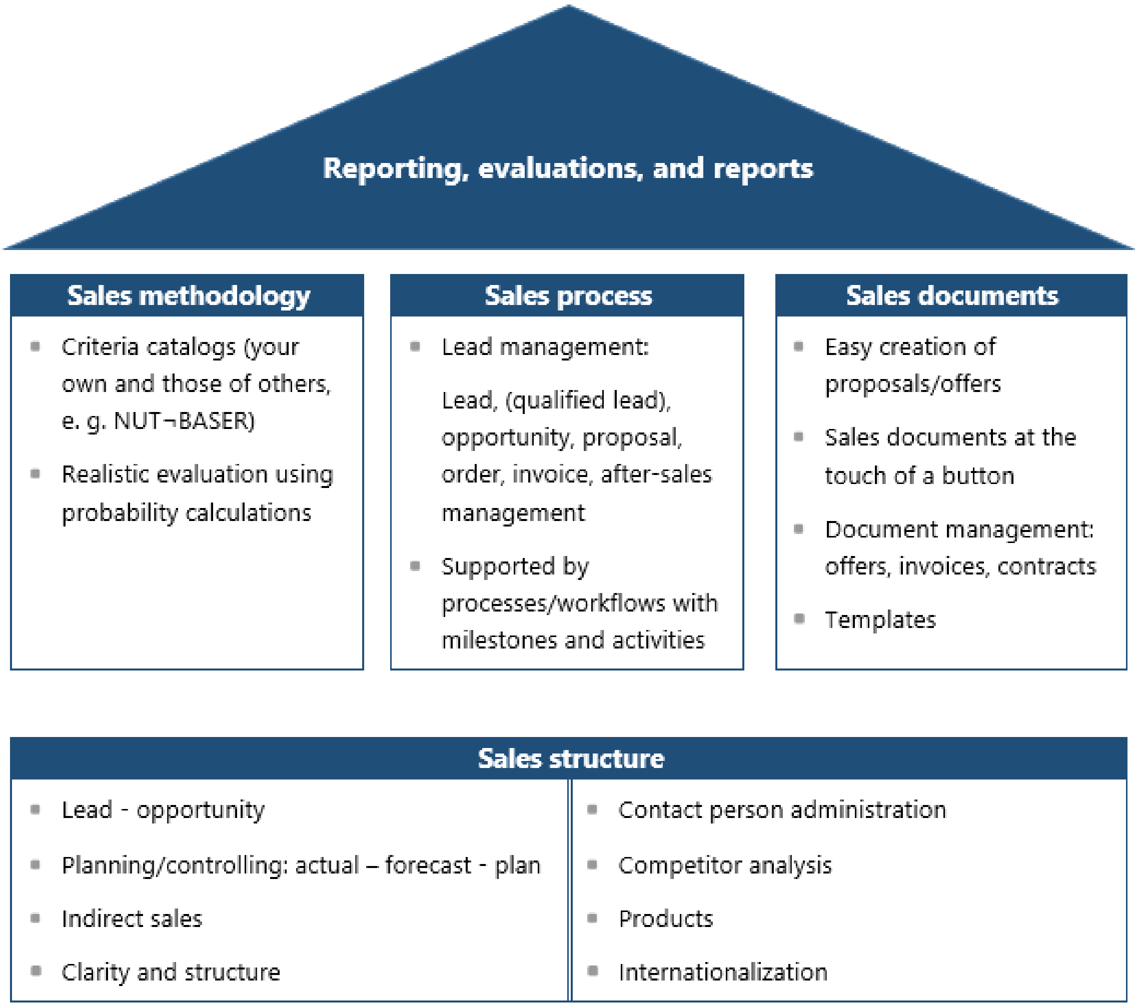
Contents

1 Sales pro

The Sales pro module enables you to improve your sales process using sophisticated sales methods. With reliable forecasts and comprehensive control functions, you can achieve your sales targets more easily and complete routine tasks considerably faster. Sales pro helps you to set the focus on sales.

All functions of the Sales pro module are available in the standard languages.

The following diagram illustrates how the CAS genesisWorld Sales pro module can support you.



The CAS genesisWorld Sales pro module helps you to organize your sales structure and processes:

Lead: First contact with prospective customers

With Sales pro, CAS genesisWorld features a new data record type: **Lead**.

The **Lead** data record helps sales staff to enter information about the first contact made with a prospective customer. First contact usually occurs on company websites, trade shows or other such events.

During first contact, certain data of the prospective customer is usually gathered in a form on a website, from business cards at a trade show, or from a lead questionnaire.

In the Sales pro module, this data is saved in the **Lead** data record. Certain data can be entered in this data record, for example, the preferred or most common contact method of the person.

All information available about a prospective customer is then saved in CAS genesis-World and accessible in the Lead data record. Before a prospective customer is transformed into a valid address and an opportunity is created, the data can be qualified and completed if necessary.

Leads and Opportunities

You can transfer leads to another data record for further processing, for example, if you want to create a new task or opportunity with the lead contact data.

You can enter different contact persons, competitors, and salespersons into opportunities.

Sales Methodology

A methodical approach to sales is supported by criteria catalogs. Criteria catalogs can be developed or assumed from other standards.

You can easily assess sales completions using the automatic probability calculation.

Sales process and documents

You are provided with comprehensive support through all phases of sales process management, from the first lead and qualification, through to the opportunity and after-sales management.

Create different sales processes to represent workflows using different activities and structure them with milestones.

With sales processes, you can easily create and manage necessary documents, such as information material, offers, invoices, and so on. You can also create and manage the corresponding templates.

Analysis

The Sales pro module provides evaluations and reports, which you can create in a new view according to various criteria.

2 Working with leads

The sales process begins with a contact: Someone contacts you and shows an interest in your products or services. At least the name of the prospective customer is registered.

The information gathered during first contact is entered in the new **Lead** data record type.

At the same time, the corresponding address can be checked and entered in a new data record. The employee responsible can be entered in the lead.

You can then create a new data record from the lead, for example, an opportunity. Specific lead content can be adopted automatically into the opportunity.

If your company prefers project-oriented work, you can also create a project based on the lead data record.

After a trade show or after you finished a phone call, you can enter the contact information from business cards or trade show questionnaires in a CAS genesisWorld lead. The lead is processed in three steps:

- You enter the address and additional information.
- You qualify the address.
- You create an opportunity or another data record from the lead.

The **Status** field is automatically completed. This field indicates the steps that have already been executed:

You can tell if the lead is **new**, whether the address has already been **entered** and **qualified**, or if a new data record has been **created**.

> You can customize the **Lead** data record type by adding further fields depending on your requirements.
>
> You can also define input assistance options for existing and new fields, for example, for **Source**, **Product** and **Volume**.
>
> Please contact your administrator if necessary.

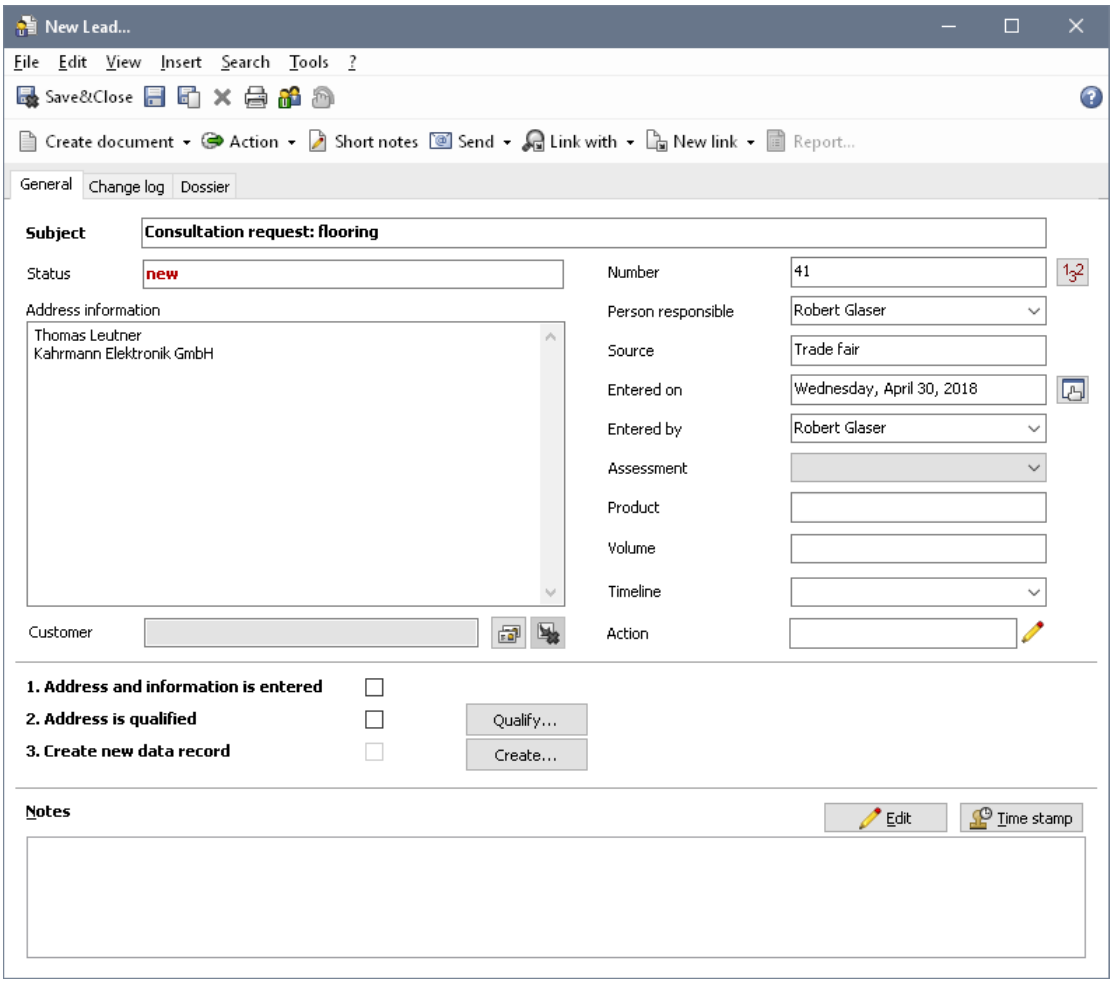
2.1 Entering and qualifying leads

The **Lead** data record type enables you to quickly and easily enter the most essential data of an initial contact with the customer.

✓ All available information is entered in the **Address information** field.

✓ In the **Action** field, you enter the actions that still need to be executed, for example, the create appointment action.

With **Report**, you create lead analyses from specific report templates.



Qualifying addresses

In principle, you have two options for qualifying an address, i. e. for linking with an address.

Use the **Select/display customer** button to link the lead with an existing address.

With **Reset selection**, you remove the link to an existing address.

✓ Use the **Qualify** button to create a new address using the text in the **Address information** box and link this address with the lead.

After clicking the **Qualify** button, a prompt opens. Choose whether you want to create and link an individual contact, a company, or a contact person.

Notes

The **address information** is only automatically transferred to the new address if the user is allowed to use the address wizard. The respective right is assigned by the administrator. Please contact your administrator if necessary.

> If the respective right has not been assigned, an address data record opens and the information has to be entered manually.
>
> The **address information** is only automatically transferred to the new address if you are online. Qualifying uses a Web-service from CAS Software AG. If you are offline, you can create a new address manually.
>
> You may only be able to save a lead if an address is linked to the lead. Users with sufficient rights can change these settings in the lead settings, see chapter "Additional settings" on page 34.
>
> If a lead is created from an address, then this address is automatically linked with the lead via the **Customer** link type. When you are finished, the lead will already have been qualified.

2.2 Creating a new data record from a lead

If you have qualified an address in a lead, you can create a new data record from the lead later in the sales process.

> The **Address information** is only automatically transferred to the new address if you are allowed to use the address wizard.
>
> The necessary rights are granted to you by the administrator. Please contact your administrator if necessary.

✓ Open a **lead**.

✓ Click the **Create** button.

The **Create new data record** window opens.

✓ Select the desired data record type from the drop-down list.

Thereby, you determine which new data record type is created. The data record types you can choose from here are defined in the settings for leads, see chapter "Field assignment" on page 31.

The following steps are then automatically executed by the Sales pro module:

- A new data record is created (e.g. an opportunity). Certain field values from the lead are entered in the fields of the new data record.

  The fields that are transferred to the new data record are defined in the settings for leads, see chapter "Field assignment" on page 31.

  Fields that have not been assigned are noted in the notes field of the new data record.
- A general link is used to link the new data record with the lead.
- The link between the lead and the address is applied to the new data record.

  Finally, both the lead and the new data record are linked with the address.

2.2.1 Opportunities: special features

If you create a new opportunity data record from a lead, you can check the new opportunity for duplicates. For links to the customer, special rules apply.

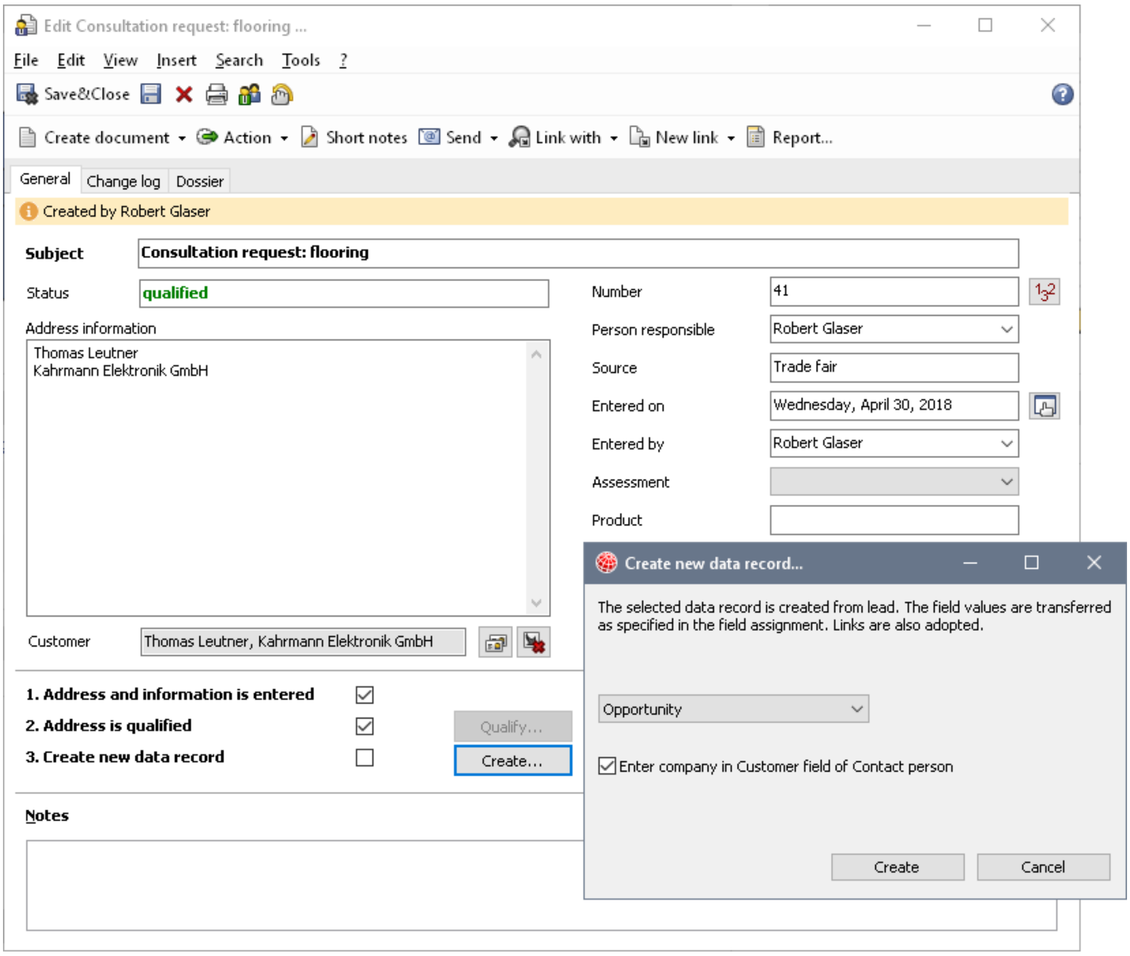
The lead is linked to an address. When creating an opportunity, the program checks whether opportunities already exist for this address.

If the linked address is a company or a contact person, all opportunities of this company and all opportunities of the contact persons are checked.

You can therefore be sure that all opportunities are unique and are only processed once.

> You activate duplicate checking in the settings, see chapter "Additional settings" on page 34.

Changing links automatically



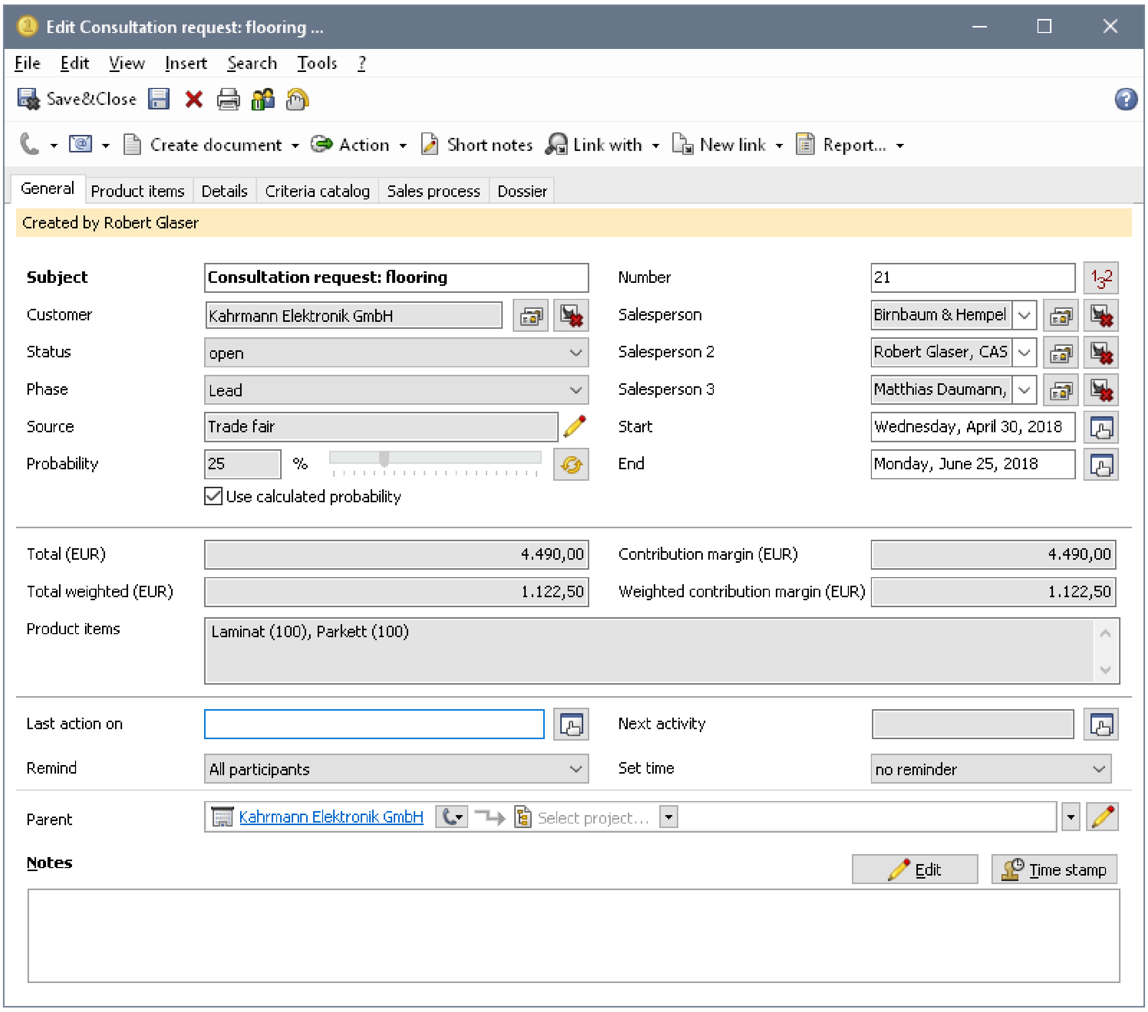
If a lead is linked to an address with the link type **Customer**, the link is adopted in the newly created opportunity.

If the lead is linked to a contact person, the contact person is also entered in the new opportunity as a **Customer** link type.

With the **Enter company in Customer field of Contact person** option, the company of the contact person is identified and entered as a **Customer** link type. The contact person who was linked originally is then linked with the opportunity using a **Contact person** link type.

3 Opportunities in the Sales pro module

The Sales pro module helps you to implement a methodical sales approach and provides functions and commands for the necessary sales processes. The opportunity data record is enhanced with additional tabs and features.



- On the **General** tab, you will find functions, for example, for calling and linking contact persons.
- Use the **Contact person** tab to enter contact persons in the customer's company and their influence on your success in closing an opportunity.
- On the **Competitor** tab, you can add the name of potential competitors and the influence they may have on the customer's purchasing decision.

- On the **Criteria catalog** tab, you can select a criteria catalog. The influence of certain criteria helps you to obtain knowledge about the customer and the potential success of the opportunity.
- On the **Sales process** tab, you can select a specific sales process. With this sales process, you can plan the activities to successfully close an opportunity.
- With systematic processes and the corresponding functions, you can evaluate completions using the automatic probability calculation, see chapter "Probability calculation" on page 18.

Opportunities can be created from a lead.

Before you can save a new opportunity, you must enter a customer. The entered customer is linked to this opportunity with the **Customer** link type.

The **Customer** link type can only be used once for an opportunity.

If you link a second address with the **Customer** link type, the previous link is transformed into a general link.

3.1 Functions on the General tab

On the **General** tab, you can record the **Salesperson**, **Status**, **Source**, and further important information on the opportunity.

Salespersons

In the Sales pro module, the fields **Salesperson**, **Salesperson 2**, and **Salesperson 3** are available on the **General** tab in opportunities. In these fields, you can enter addresses that are linked to the opportunity with special link types.

In the Desktop Client settings, you can enter favorites for the selection of this address. You can find more information and an example in the sales settings, see chapter "Sales" on page 32.

> The field names and the names of link types can be changed by your administrator. Please contact your administrator if necessary.

Linking

If you link the opportunity with any new data record, a prompt is displayed. You can now also link the new data record with all addresses to which the opportunity is linked.

For example, you can click **New link** and select **Appointment**. A window opens displaying a list of all addresses that are linked to the opportunity. Now, select the addresses you want to link with the new appointment.

When linking an opportunity with any existing data record, the customer address of the opportunity is automatically linked to the existing data record.

End field

If you do not fill in the **End** field of an opportunity, a notification is displayed during saving.

> A large number of the evaluations for opportunities are made based on the **End** field, for example, the forecast for a certain time period. Therefore, we recommend that you always fill in this field. If you do not fill in this field, the opportunity will not be included in the respective evaluation.

Participants of an opportunity

Users can automatically be entered in the **Salesperson**, **Salesperson 2**, or **Salesperson 3** fields. In this case or if you manually edit these fields, these users can also be automatically entered as participants with certain rights in the opportunity. You can define individual specifications in the sales settings, see chapter "Sales" on page 32.

Automatic probability calculation

The probability of an opportunity can be calculated automatically based on the parameters on the **Contact person**, **Competitor**, **Criteria catalog**, and **Sales process** tabs, see chapter "Probability calculation" on page 18.

Phase

If a milestone with a new phase has been reached in the sales process, the new phase is automatically entered in the **Phase** field.

The names of the respective phases depend on the specifications of the used sales process, see chapter "Sales processes" on page 28.

3.2 Functions on the Contact person tab

On this tab, you can record the contact persons of an opportunity and their **Attitude**.

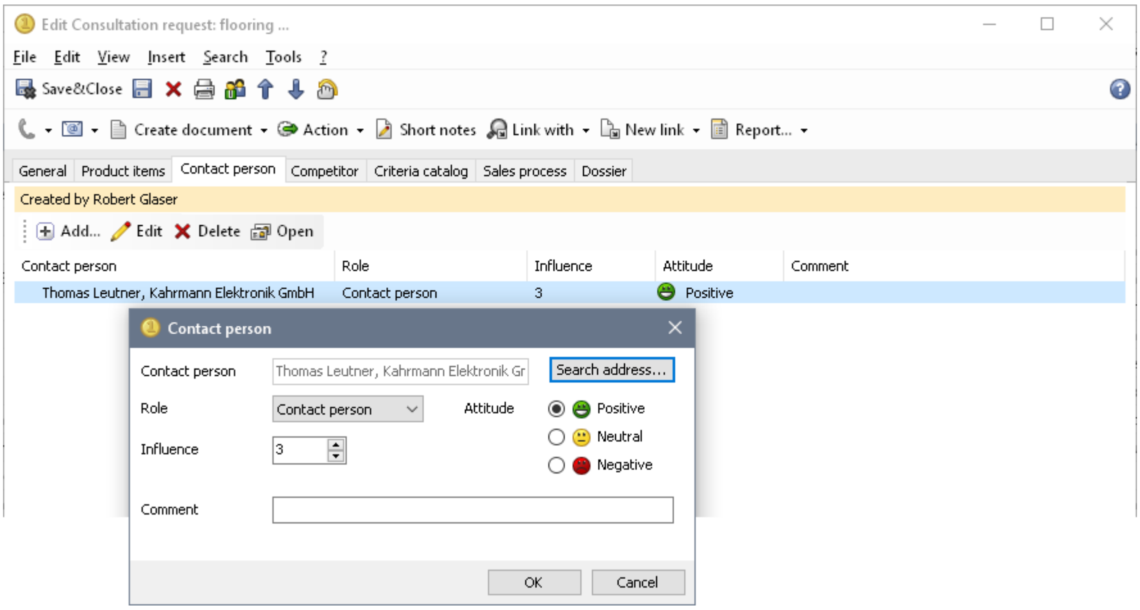
✓ Click the **Add** button.

The **Contact person** window opens.

✓ Click **Search address**.

The **Search** window opens. You can only enter addresses that have been recorded in CAS genesisWorld as contact persons.

If you have already linked an address as a customer to the opportunity, the search field is already filled in with the contact person(s) of this company.



✓ Select the **Role** you want to assign to the contact person.

All possible roles are determined by the administrator. Please contact your administrator if necessary.

All links to addresses with the respective link types are displayed on the **Dossier** tab of the **Addresses** list.

✓ Enter the **Weighting**.

✓ Select whether this weighting is to be of a positive, neutral, or negative **Attitude**.

These values influence the probability calculation, see chapter "Probability calculation" on page 30.

Red indicates a probability of under 33%.

Yellow indicates a probability of between 34% and 66% and

Green indicates a probability of more than 66%.

✓ If required, enter a comment for each contact person in the **Comment** field.

3.2.1 Partial probability for contact persons

The overall probability of an opportunity is calculated using the weighted partial probabilities of the areas **Contact person**, **Competitor**, **Criteria catalog**, and **Sales process**, see chapter "Probability calculation" on page 30.

The partial probability for the contact persons is the sum of the values in the attitude and opinion fields of each contact person. The attitude can range from -1 (negative), 0 (neutral) to +1 (positive).

The minimal probability is 0 %. If the weighted sum is negative, the probability of 0 % is displayed.

Example

Contact person 1, weighting: 50, Attitude: 0

Contact person 2, weighting: 30, Attitude: -1

Contact person 3, weighting: 20, Attitude: +1

Probability = 50*0 + 30*(-1) + 20*1 = 0 - 30 + 20 = -10 / 100 = -0,1 = -10%

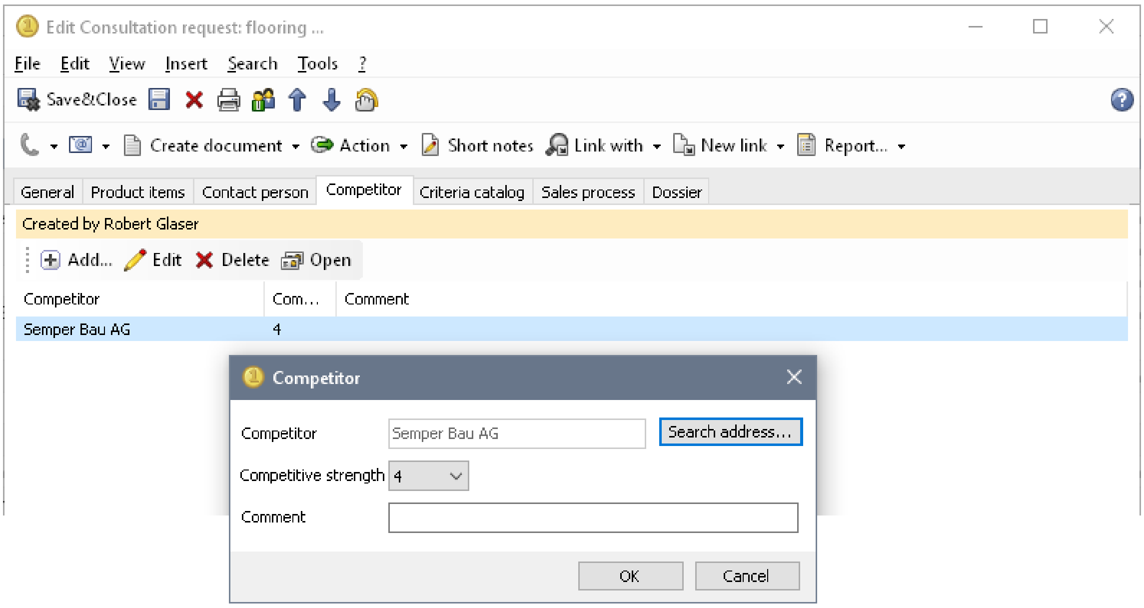
As this value is negative, the probability is 0%.

3.3 Functions on the Competitor tab

On this tab, you can enter the competitors for the opportunity and their competitive position.

✓ Click the **Add** button.

The **Competitor** window opens.



✓ Click **Search address**.

The **Search** window opens. You can only enter addresses that have been recorded in CAS genesisWorld as competitors.

If an address is not recorded in CAS genesisWorld, you can directly enter the name of a competitor in the input field.

✓ Select a **Competitive strength** between 0 and 10, with 10 as the strongest value.

The **Competitive strength** reflects an evaluation of the competitive position of competitors. Entries in this drop-down list are pre-defined and cannot be changed.

✓ If required, enter a comment for each competitor in the **Comment** field.

> The probability for the successful conclusion of an opportunity is based on the strongest competitor, see chapter "Probability calculation" on page 30.
>
> If you have entered a competitive strength of 10 for the strongest competitor, the probability is 0%. If the strongest competitor has a competitive strength of 4, the probability is still 60%.
>
> The values are displayed with different colors, as on the **Contact person** tab.

3.3.1 Partial probability for competitors

The overall probability of an opportunity is calculated using the weighted partial probabilities of the areas **Contact person**, **Competitor**, **Criteria catalog**, and **Sales process**, see chapter "Probability calculation" on page 30.

The partial probability for competitors is calculated based on the strongest competitor. Select a Competitive strength between 0 and 10, with 10 as the strongest value.

If the maximum strength of all competitors is rated 0, the probability of completing the opportunity is 100%.

If the maximum strength of all competitors is rated 10, the probability of completing the opportunity is 0%.

The formula is 100 - (maximum strength * 10) = x [%]

Example

Competitor A: 1

Competitor B: 3

Competitor C: 5

The maximum strength is 5, that is, the probability is 50%.

As the program cannot differentiate whether a competitor has not yet been entered or does not exist, an initial value of 100% is set.

4 Sales methodology

With its criteria catalogs, the Sales pro module supports your sales methodology. You can create, edit, use and change one or more criteria catalogs. Criteria catalogs can be used for project business, for standard sales processes, for services and so on.

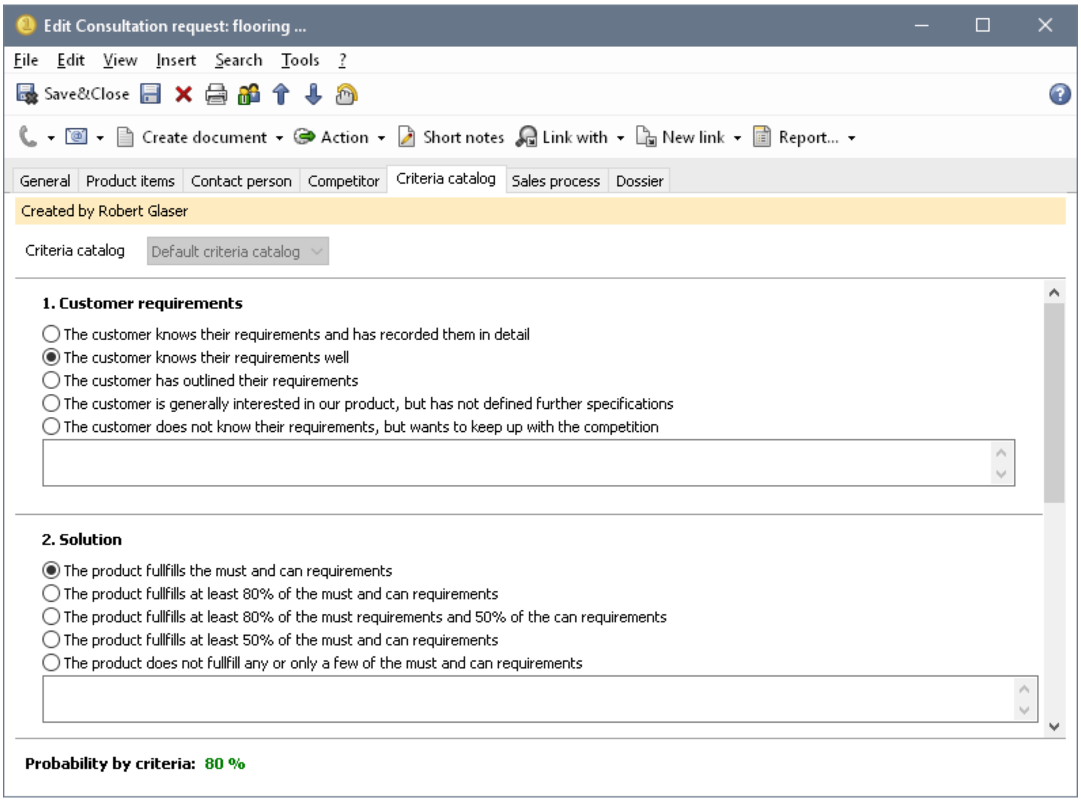
Your sales processes are further supported by the automatic probability calculation according to entered criteria. With this assessment function, you can control your sales activities.

4.1 Criteria catalog

First, select a criteria catalog and then define the characteristics of each criterion for the customer of the opportunity.

You can create and use several criteria catalogs with the Sales pro module. Default characteristics of each criterion can be selected in the settings.

Users with sufficient rights can define one or multiple criteria catalogs, criteria, and characteristics in the settings, see chapter "Criteria catalogs" on page 25.



Notes

Criteria catalogs are activated, in other words, made available to users. If you no longer want to use a criteria catalogue, you can deactivate it.

Existing opportunities with reset criteria catalogues remain unchanged. You cannot use a deactivated criteria catalogue for new opportunities.

The names of criteria can be changed, even though a criteria catalog is in use.

Points and weightings of single criteria cannot be changed as long as a criteria catalog is in use. This restriction exists due to the fact that the probability calculation for the criteria catalog is made based on this data. This (partial) probability is then taken into account for the probability calculation for the opportunity.

If changes to the weighting were permitted, changes in the probability could occur. Such undesired changes can thereby be prevented.

4.2 Probability calculation

You can calculate the probability for an opportunity on the **General** tab. The calculation is based on the different parameters recorded on the **Contact person**, **Competitor**, **Criteria catalog**, and **Sales process** tabs, see chapter "Probability calculation" on page 30.

✓ Activate the **Use calculated probability** checkbox.

If you deactivate the checkbox, you can manually enter a probability.

Click **Recalculate probability** to recalculate the probability.

Such a recalculation could be required if, for example, you have changed the contact person, competitors, and so on, in the opportunity.

5 Sales process

In the Sales pro module, you use one or more sales processes to help plan your sales activities with work processes or workflows with activities and milestones.

The sequence of actions of a process is predefined and actions can easily be entered.

One or several sales processes with milestones and corresponding activities are defined in the settings for sales processes, see chapter "Sales processes" on page 28.

The sales process from lead to opportunity to after-sales management is clearly defined and follows a logical, plannable sequence.

✓ Open an opportunity on the **Sales process** tab.

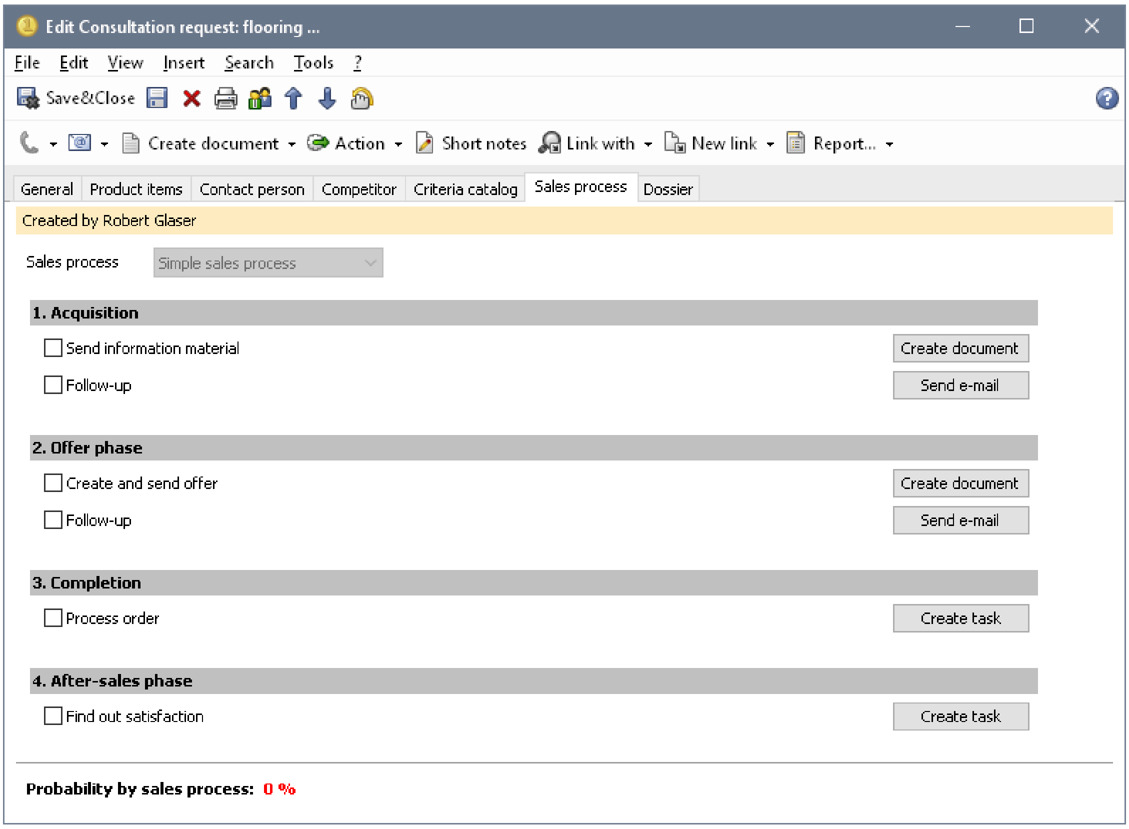
✓ Select a **Sales process**.

✓ Activate the checkbox with the activity you want to do next.

The respective activities are defined in the settings for sales processes, see chapter "Sales processes" on page 28.

✓ Click on the corresponding button next to the desired activity.

Depending on the activity, a corresponding window opens. In this window, you can execute the desired activity or create a new data record. The data record with the task, the phone call, and so on, is automatically linked with the opportunity.



After you have created an activity, the date on which the data record was created is displayed in the corresponding field. Furthermore, the date on which the last activity has been performed is displayed in the **Last action on** field on the **General** tab.

Notes

Sales processes are activated, in other words, made available to users. If a sales process is no longer being used, you can deactivate it. Existing opportunities with an unpublished sales process remain unchanged. You cannot use a deactivated sales process for new opportunities.

The name of milestones and activities can be changed, even if a sales process is being used. The assignment of an activity to a phase cannot be changed. The points and weightings of an activity and the respective activity can also not be changed retroactively.

This restriction exists due to the fact that automatic processes of the opportunity are based on this data, for example, the automatic calculation of probability.

6 Evaluating opportunities

You can easily create opportunity evaluations in a new view by entering different criteria and you can change them directly in this view.

Evaluations can be displayed in a chart and you can export this chart as an image file.

For this purpose, create an **Opportunity analysis** view with the View wizard.

✓ Click **New** > **View** in the **File** menu.

The View wizard will open.

✓ Select **Opportunity analysis** as view type.

✓ Select the desired template.

The View wizard contains several templates for the **Opportunity analysis** view that differ in filter settings and chart type.

> If you want to make evaluations, especially with regard to time periods, you have to fill in the **End** field in opportunity data records.
>
> If you save an opportunity without filling in this field, you will receive a message.

6.1 Settings when creating a view

You can define the content for this view in the View wizard or in the settings of each view:

✓ Go to the **View** tab or the respective page of the View wizard to enter your filter criteria.

✓ Go to the **Chart** tab to define settings for the chart of the evaluation.

You can also change both filter criteria and settings for the chart directly in the view without opening the **Properties** window for the view.

> You can create or change views if your administrator has given you the necessary rights to change the navigator. Please contact your administrator if necessary.

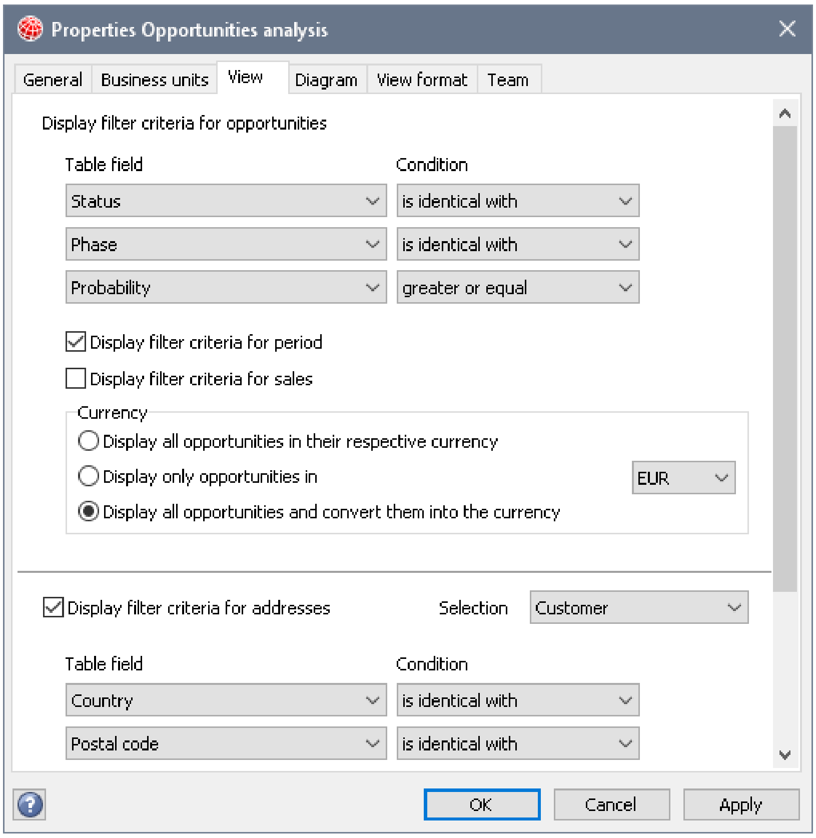
6.1.1 View: filter criteria

Go to the **View** tab or the respective page of the View wizard and define central settings.

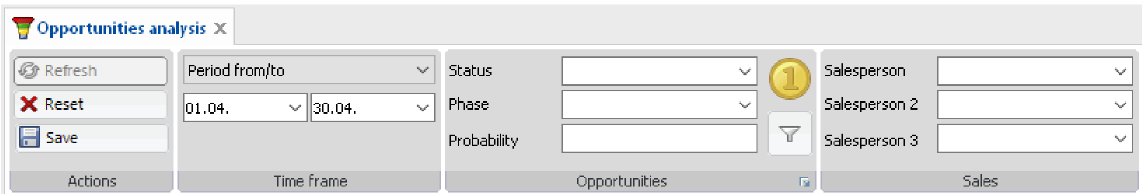
With those settings, you can also define which filter criteria you want to display directly in the view in order to work with the data.

✓ In **Display filter criteria for opportunities**, you can select 3 **table fields** and **conditions**.

Filter criteria for opportunities are displayed in the view. The **filter value** for each filter condition can be directly entered in the view.



You can also define further criteria in the view itself. Filter criteria that have been selected in the view properties are displayed in different panes with descriptions, such as **Actions**, **Opportunities**, and so on.



- ✓ If you activate the **Display filter criteria for period** option, a pane with a drop-down list is displayed in the view.

  With the **Period from/to** entry in the drop-down list, two more fields are displayed in which you can define the start and end time of a period. With the **User-defined** entry, a field with a button that opens a box with specific dates is displayed.
- ✓ Activate the **Display filter criteria for sales** option to display the salesperson fields in the view.
- ✓ With **Display filter criteria for addresses**, you can display filter criteria for customers, competitors, contact persons, and so on.

The drop-down list contains all link types for addresses.

- ✓ If you activate the **Display filter criteria for product items** option, filter criteria for product items are displayed.

  The filters refer to the product items that are entered in the opportunities.

Currency settings

All views for the **Opportunities analysis** contain special filter options for the currency that is set in the respective opportunities.

- ✓ If you activate the **Display opportunities in their respective currency** option, only the information from the opportunities is taken into account.

  Thereby, all opportunities are displayed regardless of their currency. You select this option if you maintain all opportunities in one currency or if you want to make an analysis without regarding the currency, for example, if you only want to find out the number of opportunities.

- ✓ With the **Display only opportunities in** drop-down list, you can define that only opportunities in the selected currency are displayed.

  You select this option if you only want to evaluate opportunities with a certain currency.

- ✓ If you activate the **Display all opportunities and convert them into the currency** option, all opportunities that result from other filter criteria are taken into account

  If prices of product items are entered in different currencies, the total sum of product items is converted in the currency selected in the **Display only opportunities in** option. Subsequently, the converted values are displayed in the view.

> The **Base currency** which is used as default currency in your company is defined by the administrator. If you have not yet selected an entry, the **Base currency** is selected by default in any drop-down list for currency selection.
>
> The administrator defines the exchange rate and which currencies are displayed in the drop-down list.
>
> The defined exchange rates refer to the conversion of foreign currency to the defined **Base currency**. The options for conversion depend on the individual settings of your company. Please contact your administrator if necessary.

6.1.2 Chart settings

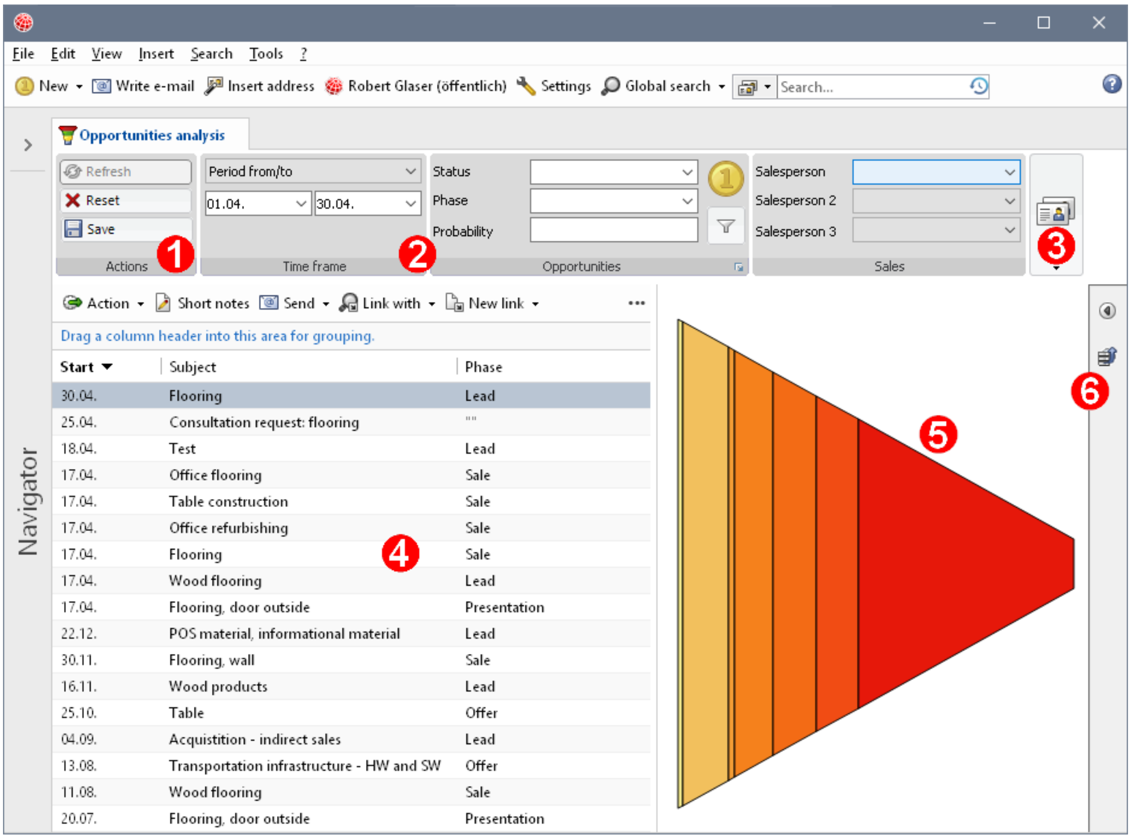
In principle, the chart settings for the chart of the **Opportunities analysis** view are the same as for any usual **Chart view** in CAS genesisWorld.

The following settings differ from the settings for other chart views in CAS genesisWorld.

- The chart always refers to the opportunity which means you do not select a data record type.
- You define filter criteria in the **View** tab or directly in the view and not in the **Chart** tab.
- In the **Displayed values** section, you define the field values you want to see and how you want to display them. You can choose from horizontal and vertical bar charts, pie charts, or **Sales funnel**.

6.2 Opportunities analysis view

This view consists of several areas.



❶ Actions

In this area, you can select actions for the opened view.

✓ Click **Refresh** if you have made changes to the filter criteria (2). Then, the view will be refreshed.

✓ With **Reset**, you can display the view as it is defined in the view properties.

✓ **Save** saves the current view in the view properties.

❷ Filter conditions

This area displays all panes for all filter criteria that you have activated in the view properties. If you, for example, activate the **Display filter criteria for period** option, the **Time frame** pane is displayed.

The **Opportunities** pane is always displayed.

Click **More filter criteria** in the panes for opportunities and addresses.

The **Filter for** window opens. In this window, you can enter additional filter criteria.

✓ Click the small arrow in the lower right corner of a pane.

A window opens in which you can change the **Table field** and the **Condition** of the displayed filter criteria directly in the view.

In principle, the filter criteria correspond to the link search, for example, search all opportunities which are linked to a specific address.

❸ More filter conditions

If the width of the screen cannot display all active panes, they are displayed as icons.

Click the button to open the corresponding settings.

❹ List of opportunities

This list displays all opportunities which are included in the view according to your settings. You can therefore, for example, save interesting opportunities as static list views in the navigator.

You can change the width of the list and the chart by moving the border line of the two areas.

❺ Chart

This area displays bar charts, pie charts, or a sales funnel.

❻ Functions for the chart

With **Display/Hide chart properties**, you can display the view properties.

In the displayed properties, you can adjust the **Displayed values**, the **Displayed data**, and the **Display**.

Export chart opens the Windows file selection box.

The chart can be saved as an image file.

6.3 Using price/discount lists

You can now maintain and include price/discount lists with Sales pro. Using these lists, you can define different prices depending on the minimum quantity for a product. These prices are included when calculating the price offer for a single product item of an opportunity.

Therefore, price/discount lists are convenient for defining scaled prices for a product depending on the ordered quantity of items. The **Prices and discounts** area in the **Details** tab is displayed for companies and individual contacts.

You can use the Customer price and/or Customer discounts fields to note down individual agreements with customers. All available price/discount lists and individual agreements with customers can be recorded in the respective fields in company data records and individual contacts.

Users with sufficient rights can define price/discount lists in the price lists and discount lists settings, see chapter "Price lists" on page 34, "Discount lists" on page 36.

> If the Sales pro license is not activated, you will not see the **Prices and discounts** area in the **Details** tab for companies and individual contacts.
>
> Prices and discounts that have been entered are taken into account for calculations even if a user without access to price/discount lists has created opportunities.

7 Sales pro settings

In the settings for the Sales pro module, you define standards for sales methodology and sales processes, for example, criteria catalogs.

✓ Click **Settings** in the **Tools** menu. You will find all the settings on the **Sales pro** tab.

7.1 Criteria catalogs

On this tab, you can create, activate, deactivate, and duplicate criteria catalogs. You can also duplicate existing criteria catalogs.

✓ If you click **New** or **Edit**, the **Create new/Edit criteria catalog** window opens.

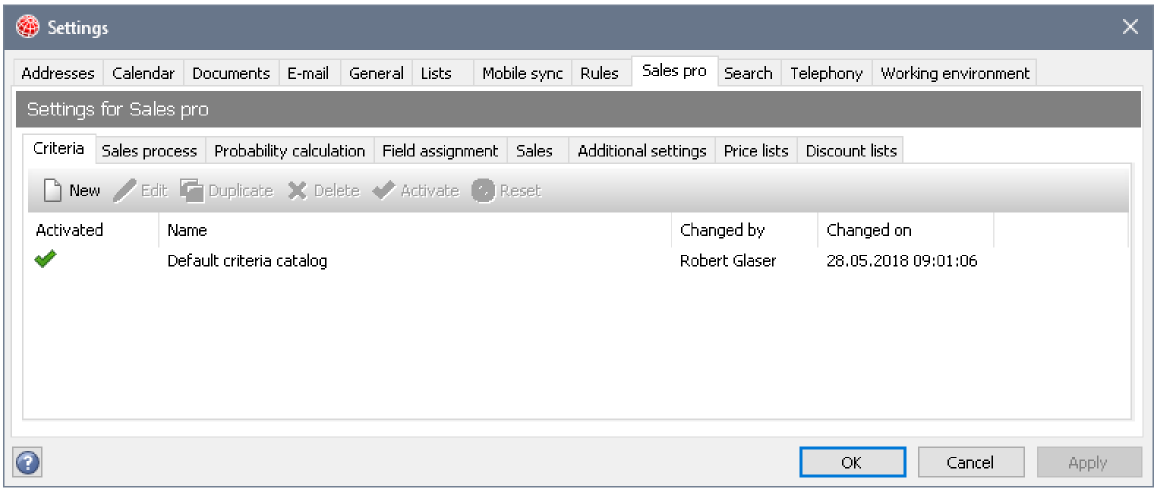
In this window, you create **Criterion**.

✓ You can enter **Ratings** for each criterion.

In addition, the rating is weighted using a points system, see chapter "Probability calculation" on page 30.

✓ If you activate the **Default** option in a rating, the rating is selected as default.

The rating can be changed at any time.



Changing the criteria catalog

Criteria catalogs that are currently in use cannot be changed.

You can only make limited changes to a criteria catalogue that is used in opportunities.

As a rule, you can only change the names of criteria, but not the ratings or points that are assigned to the respective rating.

If you need to change a criteria catalog, we recommend doing the following:

✓ Duplicate the existing criteria catalog and adapt it to your needs.

✓ **Activate** the new criteria catalogue.

✓ Mark the previous criteria catalogue and click **Reset**.

This deactivated criteria catalog is still available in all existing opportunities. In these opportunities, the deactivated criteria catalog can still be used.

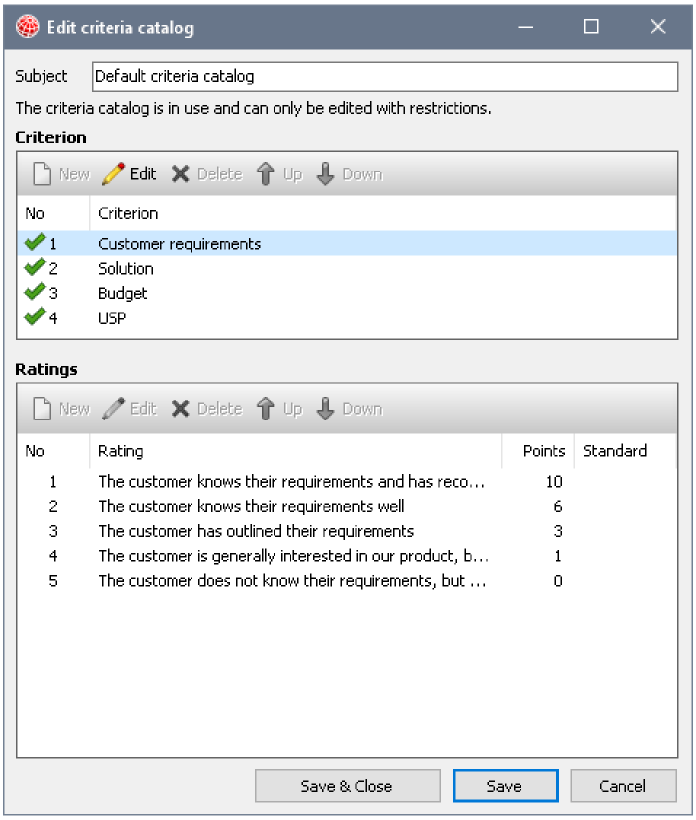
However, when you create new opportunities, you will only be able to select and use the new criteria catalog.

Example of a criteria catalog

Criteria and the assessment of each criterion are useful if you want to assess the customer and the potential success of the opportunity.

Each time a rating for a criterion has been entered, the potential success of the opportunity increases. The more points a criterion has been assigned, the more likely it is that the opportunity will be closed successfully.

Please note that the criteria should be worded positively, because the probability of the success of an opportunity increases when a rating has been given. This is set in the probability calculation, see chapter "Probability calculation" on page 30.



7.1.1 Partial probability for criteria catalogs

The overall probability of an opportunity is calculated using the weighted partial probabilities of the areas **Contact person**, **Competitor**, **Criteria catalog**, and **Sales process**, see chapter "Probability calculation" on page 30.

The partial probability for a criteria catalog is the relation between the sum of all reached/selected/marked points and the sum of the maximum number of attainable points.

Example

Criterion 1

☐ Rating 1 Points: 20

☒ Rating 2 Points: 5

☐ Rating 3 Points: 55

Criterion 2

☒ Rating 1 Points: 10

☐ Rating 2 Points: 12

☐ Rating 3 Points: 40

Criterion 3

☒ Rating 1 Points: 34

☐ Rating 2 Points: 13

☐ Rating 3 Points: 27

Maximum: Criterion 1: 55 + Criterion 2: 40 + Criterion 3: 34 = 129 (corresponds 100%)

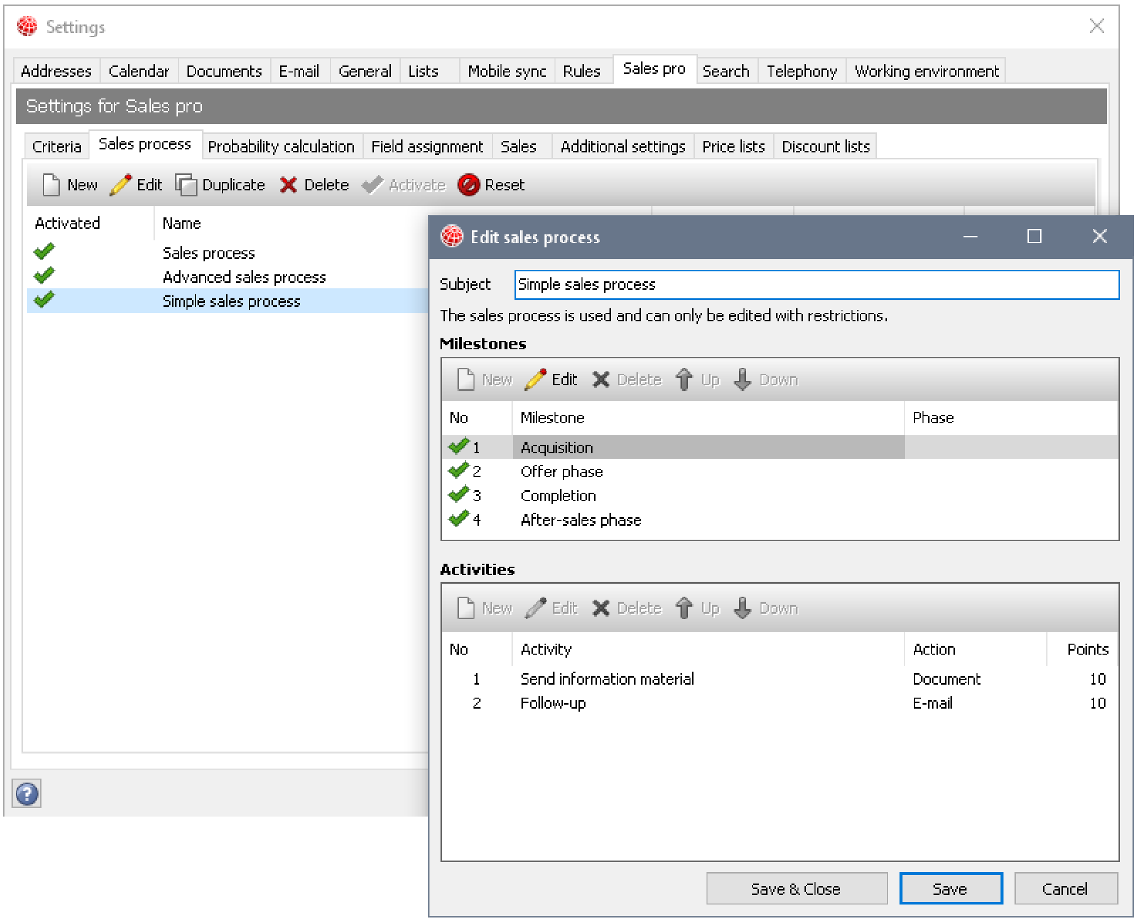
Ratings: Criterion 1: 5 + Criterion 2: 10 + Criterion 3: 34 = 49

Probability = (49 * 100) / 129 = 37.98 %, rounded up to 38%.

7.2 Sales processes

On this tab, you can create one or more sales processes, activate them, or deactivate the ones you do not want to use anymore. You can also duplicate existing sales processes.

You can select any names and assignments for milestones and activities. The points for activities can be assigned arbitrarily.



✓ Click the **New** and **Edit** buttons.

The **Edit sales process** window opens.

✓ In the **Edit sales process** window, you can create **Milestones**.

You can assign each milestone to a phase. If a milestone with a new phase has been reached, the new phase is automatically entered in the **Phase** field on the **General** tab of the opportunity.

✓ You can then create **Activities** for each milestone.

An activity can be a task, a document, an e-mail, a project, and so on. You can define a **Template** for each activity.

The **Other** action in the **Activity** window is not based on a CAS genesisWorld data record type. You can therefore not enter a template for this action and you will not find a button in the opportunity to create such a data record.

✓ Define **Points** for each activity.

These points are reached if the activity has been created.

Changing the sales process

Sales processes that are currently in use cannot be changed. Changing sales processes is the same as changing criteria catalogs, see chapter "Criteria catalogs" on page 25.

7.2.1 Partial probability for sales processes

The overall probability of an opportunity is calculated using the weighted partial probabilities of the areas **Contact person**, **Competitor**, **Criteria catalog**, and **Sales process**, see chapter "Probability calculation" on page 30.

The partial probability of a sales process is the relation between the sum of all reached/selected/marked points and the sum of the maximum number of attainable points.

Example

Milestone 1

☒ Activity 1 Points: 4

☒ Activity 2 Points: 6

☒ Activity 3 Points: 1

Milestone 2

☒ Activity 1 Points: 3

☒ Activity 2 Points: 4

☐ Activity 3 Points: 1

Milestone 3

☐ Activity 1 Points: 1

☐ Activity 2 Points: 1

☐ Activity 3 Points: 7

Total: 9 process steps with a total of 28 points, i.e. 100%.

The progress after 5 process steps is 18.

Probability = (100 * 18) / 28 = 64.28 %, rounded up to 64%.

7.3 Probability calculation

The probability of an opportunity is calculated using the weighted partial probabilities of the areas **Contact person**, **Competitor**, **Criteria catalog**, and **Sales process**.

On the **Probability calculation** tab, you define the influence of **Competitor**, **Contact person**, **Criteria catalog**, and **Sales process** on the automatic probability calculation.

✓ Activate the **Use calculated probability** checkbox.

If you deactivate the checkbox, you can manually enter a probability in opportunities.

You can assign any value between 0 and 100 for the points that define the influence of partial probability.

The sum is assumed to be 100 %. Depending on the points, you obtain the respective percentage with which the partial probability influences the calculated probability of winning an opportunity.

Example of a calculation

Weighting in %	Type	Probability in %	=
30	Contact person	0	0
40	Competitors	30	12
20	Criteria catalog	38	7.6
10	Sales process in progress	64	6.4
100	Sum		26

The calculation formula is usually: (Weighting/100) * Probability

For example: (20/100) * 38 = 7.6

Thus, the probability of winning the opportunity is 26%.

7.4 Field assignment

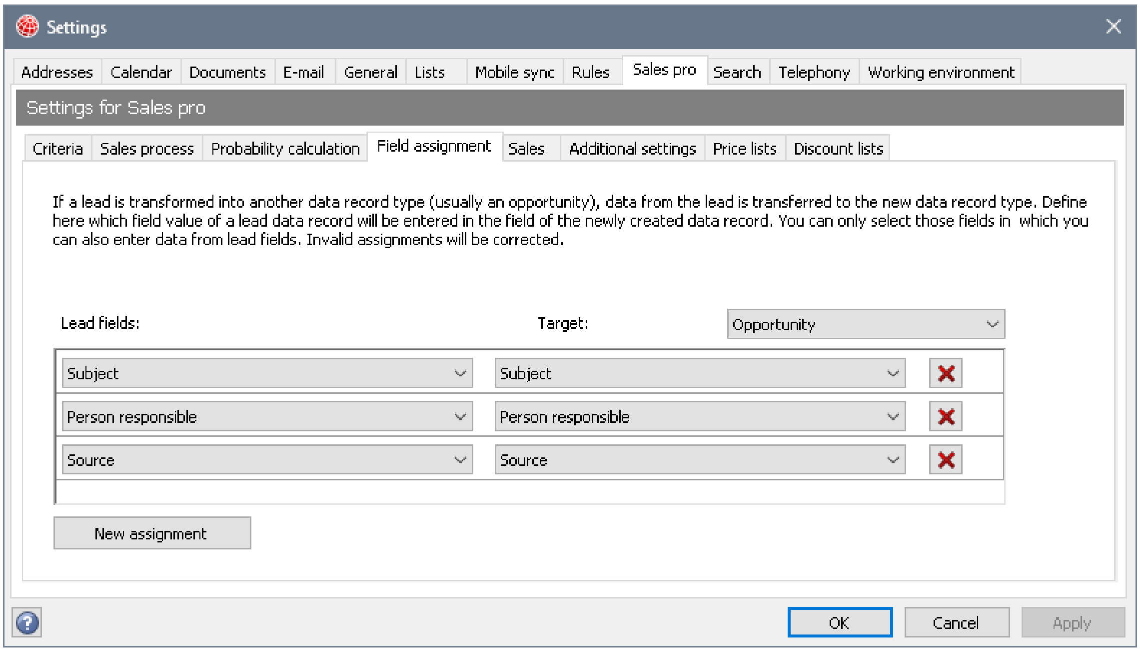
You can create a new data record from a lead during the sales process. The new data record can be an opportunity, a task, a project, and so on.

✓ Use the **Target** drop-down list to select the data record you want to assign fields to.

You can define assignments for several data record types. In addition, you can make assignments for each data record type.

The **Lead fields** section displays the fields of the lead that you want to transfer to the new data record.

In the process, only fields of the same type will be offered. In other words, date fields, for example, can only be assigned to date fields.



✓ Click **New assignment** to display an additional row.

Notes

The **Notes** field of a lead is always transferred to the identical field of the new data record.

Additionally, all values of the lead fields that have not been assigned are entered in the **Notes** field of the new data record.

When creating a new data record from a lead, only the data records with at least one field assignment are displayed.

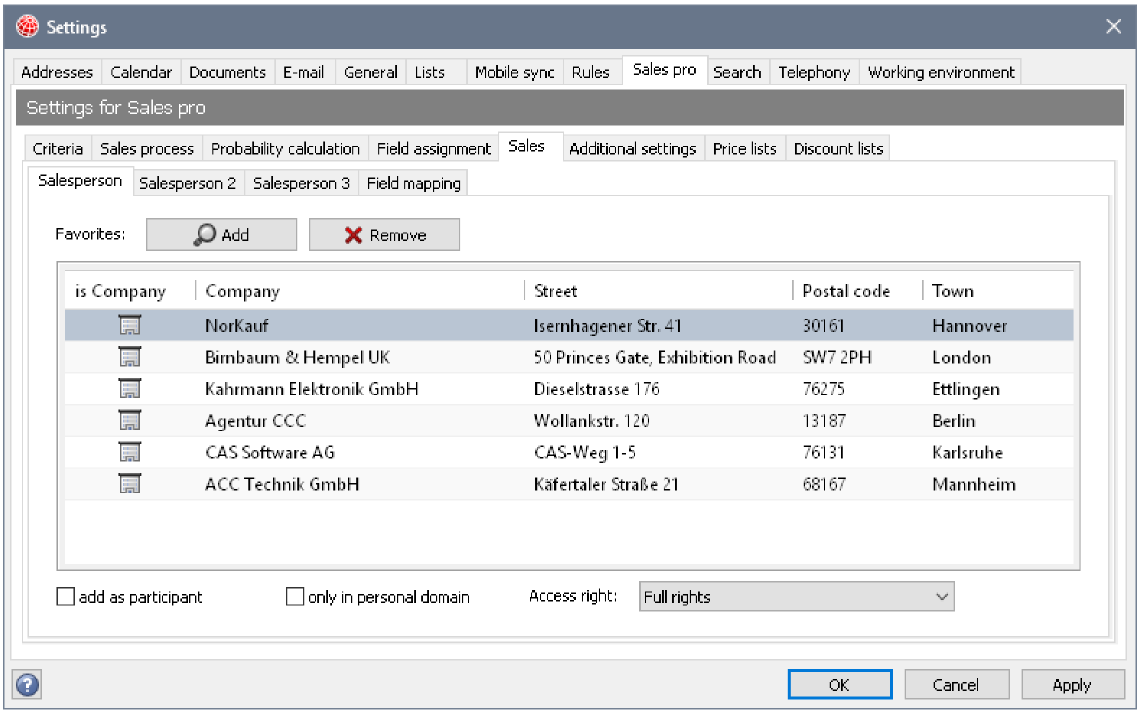
For example: let's say you would like to create a document from lead. The document data record type is not displayed by default. Thus, you need to define a field assignment, for example, subject to subject.

7.5 Sales

On these tabs, you enter your sales department's structure.

For this purpose, you define **Favorites** for the **Salesperson**, **Salesperson 2**, and **Salesperson 3** fields. By selecting **Favorites**, you can find your preferred selection for the salesperson fields on the **General** tab of the opportunity. The favorites are displayed in the desired order in the drop-down list for the **Salesperson**, **Salesperson 2**, and **Salesperson 3** fields.

You can enter any CAS genesisWorld addresses on the **Salesperson**, **Salesperson 2**, and **Salesperson 3** tabs. If you also want to enter CAS genesisWorld users, an employee data record for the respective users is required. Employee data records are created by the administrator. Please contact your administrator if necessary.



If such an address of a user is selected for one of the **Salesperson**, **Salesperson 2**, or **Salesperson 3** fields, the respective user can be entered as participant to the opportunity.

✓ Activate the **Add as participant** option and assign the desired **Access rights**.

✓ On the **Field assignments** tab, you define rules to automatically fill in the **Salesperson**, **Salesperson 2**, and **Salesperson 3** fields.

Example

Your company works with indirect sales channels and you sell your product via sales partners. They are looked after by a sales partner manager. With larger projects, the sales partner managers are supported by key account managers.

The field names are changed by the administrator, see chapter "Changing link types" on page 39.

- Rename **Salesperson** to **Sales partner**.
- Rename **Salesperson 2** to **Sales partner manager**.
- Rename **Salesperson 3** to **Key account manager**.

Subsequently, you can work with the adjusted field names on the **Sales** tab.

✓ On the **Sales partner** tab, click on the Add button to select the respective addresses

All addresses that have been linked to a data record using the **Sales partner** link type are listed on the Sales partner tab.

✓ On the **Partner manager** and **Key account manager** tabs, you add addresses from all internal consultants or users, and so on.

✓ On the **Field assignments** tab, you define which partner manager is responsible for which sales partner and which key account manager is responsible for which partner manager.

If you create a new opportunity and select a certain partner in the **Sales partner** field, the **Partner manager** and **Key account manager** users are automatically entered in the respective fields.

✓ If you have activated the **Participant** option on the **Partner manager** and **Key account manager** tabs, these users are also automatically entered as participants in the opportunity.

Opportunities can also easily be evaluated with regard to **Sales partner**, **Partner manager** and **Key account manager**.

Notes

If the user who is currently logged on to CAS genesisWorld has been entered as a favorite on the **Salesperson** tab, this user is also automatically entered in the respective field when creating an opportunity.

If the user is entered on several **Salesperson** tabs, he is only entered in the one field of the opportunity.

The **Salesperson**, **Salesperson 2**, and **Salesperson 3** tabs are regarded with descending priority: if the logged on user is entered on the **Salesperson** and **Salesperson 3** tab, he is only entered in the first field of the opportunity.

If a salesperson field in an opportunity is already pre-allocated with the logged on user, more salespersons are not automatically entered.

Remove the salespersons you have already entered and select them again from the salesperson favorites. The automatic enter function is reactivated.

7.6 Additional settings

Go to this tab to define various settings for leads and opportunities.

✓ With the **Link lead to an address before saving** option, you define whether a lead needs to be linked to an address.

If you activate the option, a lead cannot be saved without an address linked to it.

✓ If you activate the **Check for duplicates when transforming a lead into an opportunity** option, you can prevent duplicate linked opportunities with addresses.

If you create an opportunity from a lead, the **Opportunities related to the contact were found** window opens. You can choose whether you want to create a new opportunity or work with the existing opportunity.

Basically, when running a duplicate check, all the opportunities are displayed for all the addresses which are linked to the lead.

If you do not want to check all existing opportunities, you can restrict the volume of addresses to be checked with a filter.

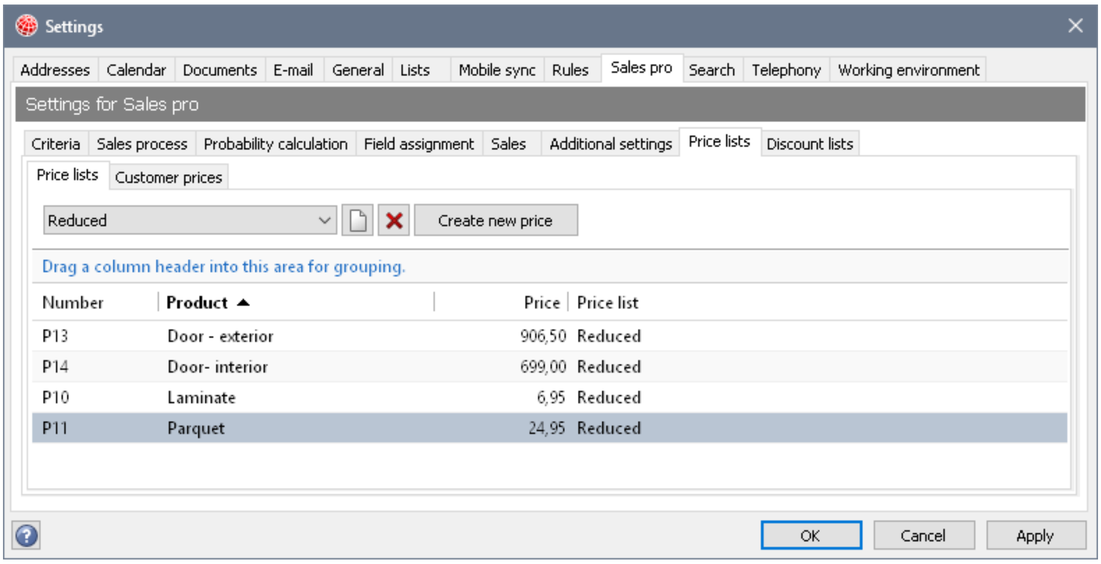
✓ With **Hide "Person responsible" and "Deputy" fields**, you can define whether the person responsible and the deputy are to be displayed in the opportunity.

✓ With the **Sort order of names** option, you can define by which fields the lists on the **Salesperson**, **Salesperson 2**, and **Salesperson 3** tabs are sorted.

This option can be helpful for lists with a large volume.

7.7 Price lists

Using price lists, you can define discounted prices for specific products. The prices can be staggered according to the minimum purchased quantity.



Consequently, you can set different unit prices for the same product depending on how many units or how much of a product is purchased.

Example

You sell flooring for 9,95 Euros per square meter. With a minimum purchase quantity of 10 square meters, the price is reduced to 6,95 Euros and with an even larger quantity to 4,95 Euros per square meter.

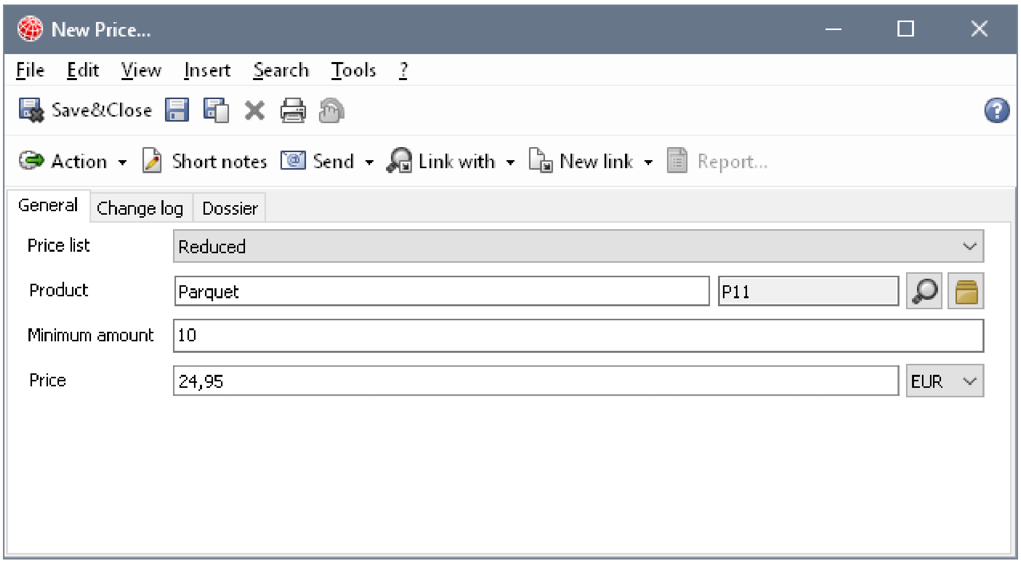
Price lists tab

Click **Create new price list** and enter a name for your price list.

The new price list is then highlighted and displayed.

Clicking **Delete price list** deletes the selected price list.

✓ Clicking the **Create new price** button opens the **Create new price** window.



✓ Select a **Price list**.

✓ Enter the product name or click the **Search products** button to select a product.

You do not have to enter the full product name, the first few letters will suffice. Now, if you click another field, the product name is completed automatically. If the letters you entered do not result in a hit, another window will open from which you can select the product.

Any hits returned will be products which agree with the product search filter in the Sales, Project, and Helpdesk modules. When using the default settings, these are products for which the **Active** option has been selected on the **General** tab. The settings are changed by the administrator in the Management Console. Please contact your administrator if necessary.

✓ Define the **Minimum amount**.

✓ Enter the **Price** you want to use for this product and the defined minimum purchase quantity.

Customer prices tab

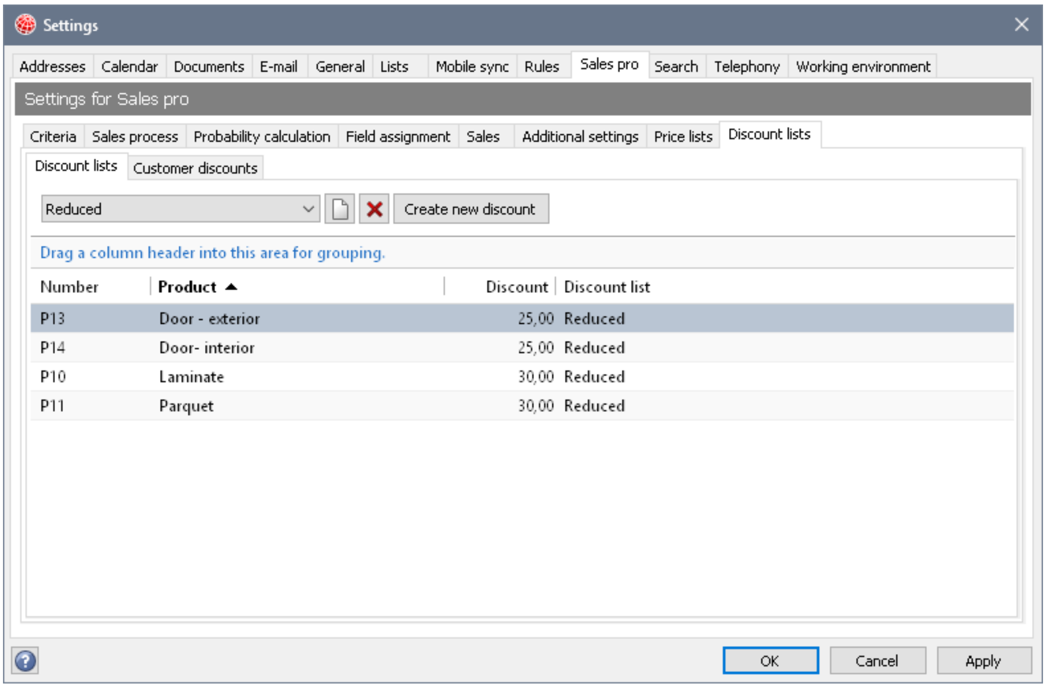
On the **Customer prices** tab, you can see personally defined price lists which have been created for specific customers. You can define these price lists on the **Details** tab in the respective address data records.

The customer price is always taken into account, regardless of whether or not other price lists exist for a customer.

> The **Prices and discounts** area on the **Details** and **Bill** tabs is displayed for companies and individual contacts.
>
> If the Sales pro license is not activated for a user, the **Prices and discounts** for companies and individual contacts will not be displayed to them. Entered prices and discounts are still taken into account if said users create an opportunity for a customer and want to calculate the prices or offered prices.
>
> If you are using the Easy Invoice module, you can create a customer discount list on the **Account** tab.

7.8 Discount lists

Using discount lists, you can create percentage discounts for specific products. As with price lists, you can stagger discounts according to minimum purchase quantities.



The discount automatically influences the offered price. If, for example, you offer 10% discount on every purchase of 10 units, the discount is automatically calculated when the number of units sold equals 10 or more.

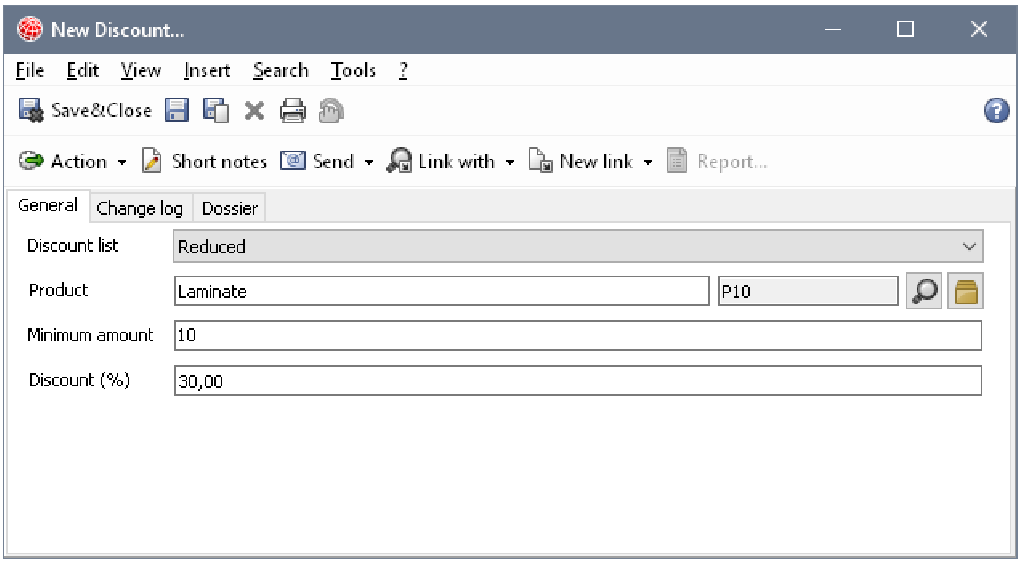
Discount lists tab

Click **Create new discount list** and enter a name for your discount list.

The new discount list is then selected and displayed.

Clicking **Delete discount list** deletes the selected discount list.

✓ Using the **Create new discount** button opens the **Create new discount** window.



✓ Select the **Discount list**.

✓ Enter the product name or click the **Search products** button to select a product.

You do not have to enter the full product name, the first few letters will suffice. Now, if you click another field, the product name is completed automatically. If the letters you entered do not result in a hit, another window will open from which you can select the product.

Any hits returned will be products which agree with the product search filter in the Sales, Project, and Helpdesk modules. When using the default settings, these are products for which the **Active** option has been selected on the **General** tab. The settings are changed by the administrator in the Management Console. Please contact your administrator if necessary.

✓ Define the **Minimum amount**.

✓ Enter the **Discount** you want to use for this product and the defined minimum purchase quantity.

Customer discount tab

On the **Customer discount** tab, you will see personalized discounts which have been created for specific customers. You can define these discount lists on the **Details** tab in the respective address data records.

> The **Prices and discounts** area on the **Details** and **Bill** tabs is displayed for companies and individual contacts.
>
> If the Sales pro license is not activated for a user, the **Prices and discounts** for companies and individual contacts will not be displayed to them. Entered prices and discounts are still taken into account if said users create an opportunity for a customer and want to calculate the prices or offered prices.
>
> If you are using the Easy Invoice module, you can create a customer discount list on the **Account** tab.

8 Management Console settings

The administrator can define and change certain settings and rights for the Sales pro module in the Management Console.

8.1 Licenses for Sales pro

The Sales pro module requires a separate license. Users without a license will not be able to use its functions. Accordingly, the license must be activated for users who are supposed to use the functions of the Sales pro module.

Only users with a Sales pro license have access to the following functions:

- Access to the data record type Lead.
- Access to the **Contact person**, **Competitor**, **Criteria catalog**, and **Sales process** tabs.
- Access to views for evaluating opportunities.

  Access to create, change, and view data records and views is dependent on the individual rights of each user.
- Only users with a Sales pro license can be granted the right to administer settings for Sales pro in the Desktop Client.
- Users without a license can view opportunities, but without the mentioned functions described above, i.e.

  without the option to use or change a calculated probability,

  without the **Salesperson**, **Salesperson 2**, or **Salesperson 3** fields,

  without the **Contact person**, **Competitor**, **Criteria catalog**, and **Sales process** tab.

8.1.1 Sales pro: administrator

It is usually one user who defines the sales structure, creates and maintains criteria catalogs and processes, and so on. This user needs to be assigned special rights by the administrator in the Management Console. All further settings for Sales pro are defined by the user with the special administration right in the Desktop Client.

✓ Open the **User Management** area in the **Management Console**.

✓ Open the **Properties** window of the designated user.

✓ Activate the **Sales pro: Administrator** option on the **Other rights** tab.

> The user responsible for administering the Sales pro module can define settings and defaults for the Sales pro module in the Windows client: in the **Tools** menu, click **Settings**. In the **Settings** window, you will see the **Sales pro** tab.

8.2 Changing link types

You can change the names of the **Favorites Salesperson**, **Salesperson 2**, and **Salesperson 3** in the Management Console. Thus, the names of the **Salesperson**, **Salesperson 2**, and **Salesperson 3** link types can be fit to the individual sales structure of your company.

✓ Open the **Management Console** in the **Miscellaneous** area.

✓ Open the **Link types** tab in the **Links** area.

✓ Select the link types for **Opportunities** in the drop-down menu.

✓ Select the link type you want to change, for example, **Salesperson**.

Click **Change** and modify the name.

Names can be changed for all available languages.

✓ Click **OK** to save the changes.

Example

Your company works with indirect sales channels and you sell your product via sales partners. They are looked after by a sales partner manager. With larger projects, the sales partner managers are supported by key account managers. Therefore, you change the names of the link types.

- Rename **Salesperson** to **Sales partner**.
- Rename **Salesperson 2** to **Sales partner manager**.
- Rename **Salesperson 3** to **Key Account Manager**.

- ✓ In the Windows client, all sales partners are then displayed in the **Sales** partner tab. Click on the **Add** button on this tab to select the respective addresses.
- ✓ On the **Partner manager** and **Key account manager** tabs, you add addresses from all internal consultants or users, and so on.
- ✓ On the **Field assignments** tab, you define which partner manager is responsible for which sales partner and which key account manager is responsible for which partner manager.
- ✓ If you create a new opportunity and select a certain partner in the **Sales partner** field, the **Partner manager** and **Key account manager** users are automatically entered in the respective fields.
- ✓ If you have activated the **Participant** option on the **Partner manager** and **Key account manager** tabs, these users are also automatically entered as participants in the opportunity.
- ✓ Opportunities can also easily be evaluated with regard to **Sales partner**, **Partner manager** and **Key account manager**.

8.3 Currency settings

The exchange rate and which currencies are displayed in the drop-down list of the **Opportunities analysis** view are defined by the administrator in the Management Console.

- ✓ Open the **Management Console** in the **Miscellaneous** area.
- ✓ Open the **Currencies** tab.
- With **New**, you create a new currency data record.
- ✓ Click **Change** to adjust currencies and the respective exchange rate.

1 Special considerations with modules

1.1 Easy Invoice

If you are using the Easy Invoice module, you can create a customer discount list on the **Account** tab.

1.2 Exchange sync

In sales processes, appointments can be created as an **Activity** using a **Template**.

This function is not available if you are using Sales pro and Exchange sync simultaneously.

1.3 Geomarketing

If you are using Sales pro, you can display leads on maps. To do this, customers must have been entered and the respective addresses must have been georeferenced.

1.4 Replication

Leads and opportunities are replicated with all links. This applies to all link types, for example, to customers, contact persons, and so on. The replication of these links cannot be disabled. Criteria catalogues and sales processes are always completely replicated.

1.5 Report

You can create individual report templates and edit existing report templates for lead analysis.