

## SALES REP

The sales rep module is a management tool for sales rep and administrators to communicate efficiently. It allows sales rep's to plan their days, monitor their performance and directly communicate with GlobalBake.

The sales rep module uses a laptop running a thin client needing to be connected to the internet and gives access to customer, prospects and product information.

The sales rep module also allows the sales rep to estimate opposition sales of clients and prospects to see the potential for increased sales.

The sales rep can request different changes for a customer and those requests will be emailed via the internal email of GlobalBake to a customised list of recipients.

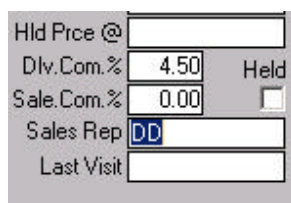
## CONFIGURATION

### RUNNING SALES APPLICATION

In order to run the Sales Rep view of GlobalBake a JADE Thin client connection must be made to connect to the Sales application of GlobalBake.

### USERS

Sales Reps are defined in the system as Suppliers and then tied to their customers on the main customer screen as per the below image. This linkage creates the sales representative relationship with the customer.



Hld Price @	
Div.Com.%	4.50
Sale.Com.%	0.00
Sales Rep	DD
Last Visit	

The final link is to tie a userid within the system to a particular sales rep so that when the user logs on they have access to the appropriate accounts. This is done from the File / User File menu item for the appropriate user as shown below.

With these settings configured the user will be able to use the functions described below within the Sales application.

SALES REP THIN CLIENT

START OF DAY

The first thing needed is to create a day. This is where information about visits and outcomes from visits are loaded. The sales rep is able to plan his day, add planned visits to clients or prospects. This is the only time you can add plan visits. You can then add your start km's, your start time and click OK. This will 'start' the day.

SSI Sales Rep Start Day

For Date10/12/2007Start Km'sStart Time08.43

Unplanned

ClientsProspects

Anytime Dairy, Tippi  
Anytime Dairy, Hillborough  
Fred's Fancy Foods

Planned

Woolworths Christchurch

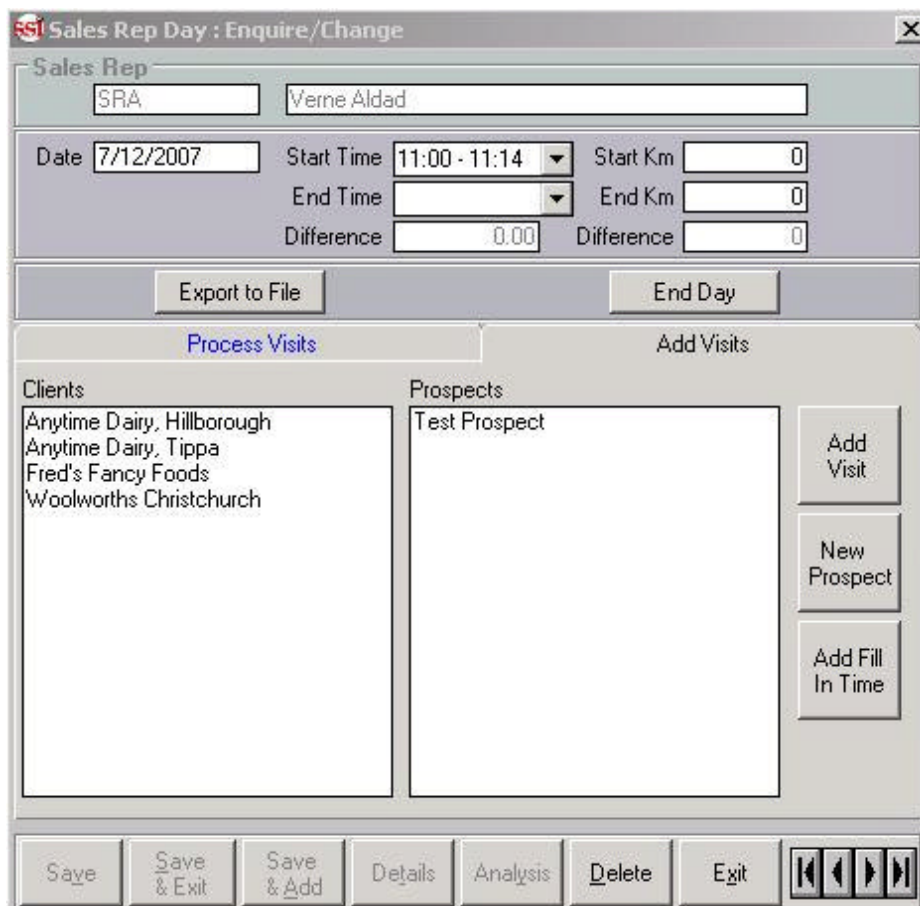
>>><<<

OkExit



## PROCESS VISITS

This lists the visits for the day. You can now add information by clicking on the line, send emails to groups and edit, edit the customer's opposition sales and review product quantities. You can export the data as a .txt file and also end the day from this screen.



## ADD VISITS

This allows you to add more visits for the day.

By selecting a client or prospect then clicking "Add visit", it will create a new line for that client under "Process visits" which can now be edited.

You can also add a "New Prospect".

You can also "Add Fill In Time". You can categorise this as "other", "Routine Call", "First Call" or "Client/Prospect Request" and create new ones, from the GlobalBake menu select Options > Sales Rep > Visit Categories.

Contact

Anytime Dairy, Hillborough

Planned ☐

Visit Details

Time In

Time Out

Visit Category

Other

Templates

Comment 1

Comment 2

Comment 3

Bake Type

Products

Send to

☐ Admin

☐ Test

☐ Other

☐ Sales

Save & Exit

Next

Delete

Exit

This is a visit. You can send different comments to different email groups. These email groups can be customised. You can also see a list of your products and what they are buying. You can also see it by bake type and can edit the bake type. If you click on a line, the screen below appears.

Debtor Bake Type : Enquire/Change

Debtor account No

210

Name

Anytime Dairy, Hillborough

Debtor

Alpha Key

ANYTIMEHI

Average Weekly Sales Dlr

34.92

Average Weekly Sales Qty

21

Actual Ranking

0

Prospect

Prospect alpha Key

Estimated Weekly Sales Dlr

0.00

Estimated Weekly Sales Qty

0

Estimated Ranking

0

Combined Ranking

0

Bake Type

5

Opposition Estimates

Alpha Key	Bake Type	Est Weekly Dlr	Est Weekly Qty

Save

Save & Exit

Save & Add

Details

Analysis

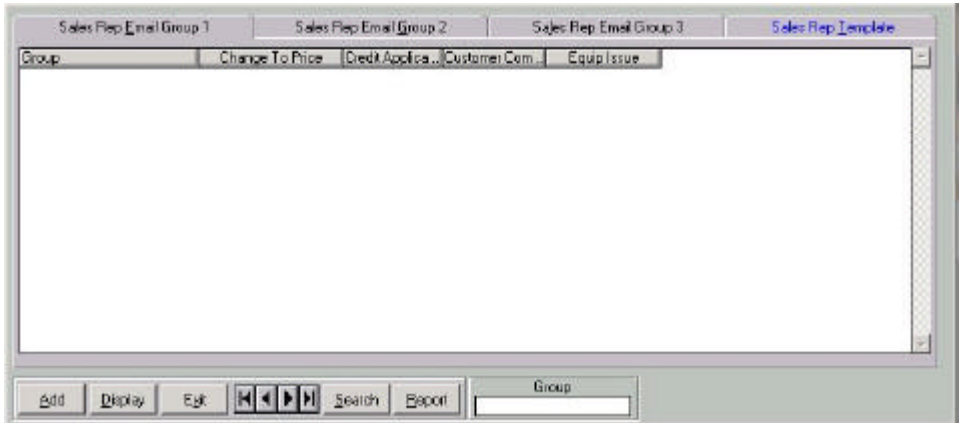
Delete

Exit

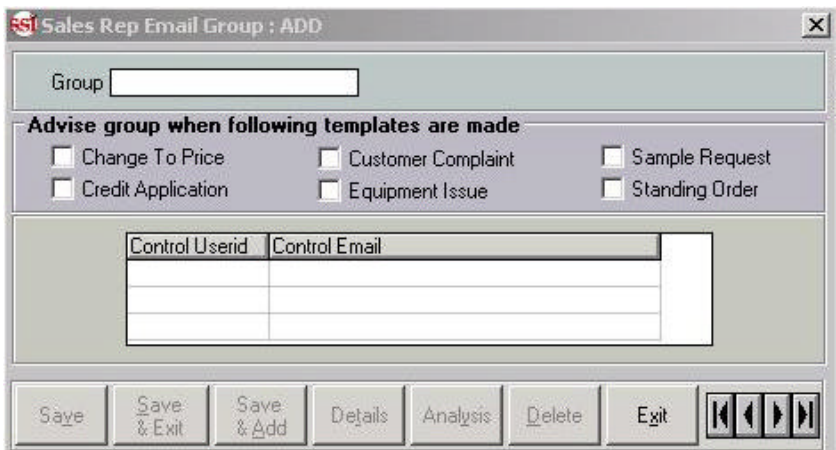
You can see the average weekly figures for that customer and that bake type. You can then add opposition estimate, this will help you see the potential for more sales.

TEMPLATES

Templates are the requests, from each client, for a change. This screen allows you to add new email groups for comments, show you email comments sent and add or edit templates.

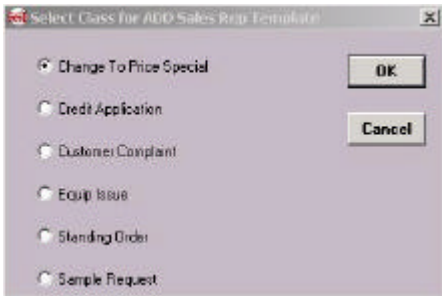


To add a new email group, click on one of the group tabs and click "add". This screen will display.

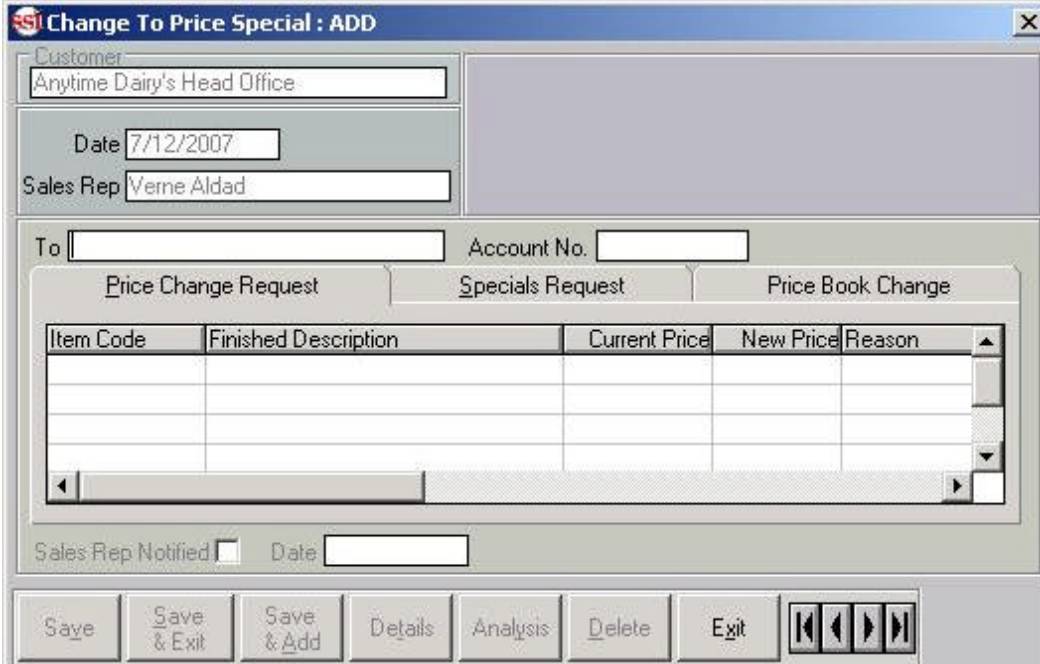


Select a name for the group. Select what templates they get notified for and add users by clicking on the lines below "Control Userid". This is their username in GlobalBake. Once saved, this group will appear as a tick box below the comment field on the visit form.

If you click on the sales rep template tab, you will see a list of current requests. You can add a new template by clicking "Add". This screen will display.



You have six options to create.

**CHANGE TO PRICE SPECIAL**

**Change To Price Special : ADD**

Customer: Anytime Dairy's Head Office

Date: 7/12/2007

Sales Rep: Verne Aldad

To: Account No.:

Price Change Request | Specials Request | Price Book Change

Item Code	Finished Description	Current Price	New Price	Reason

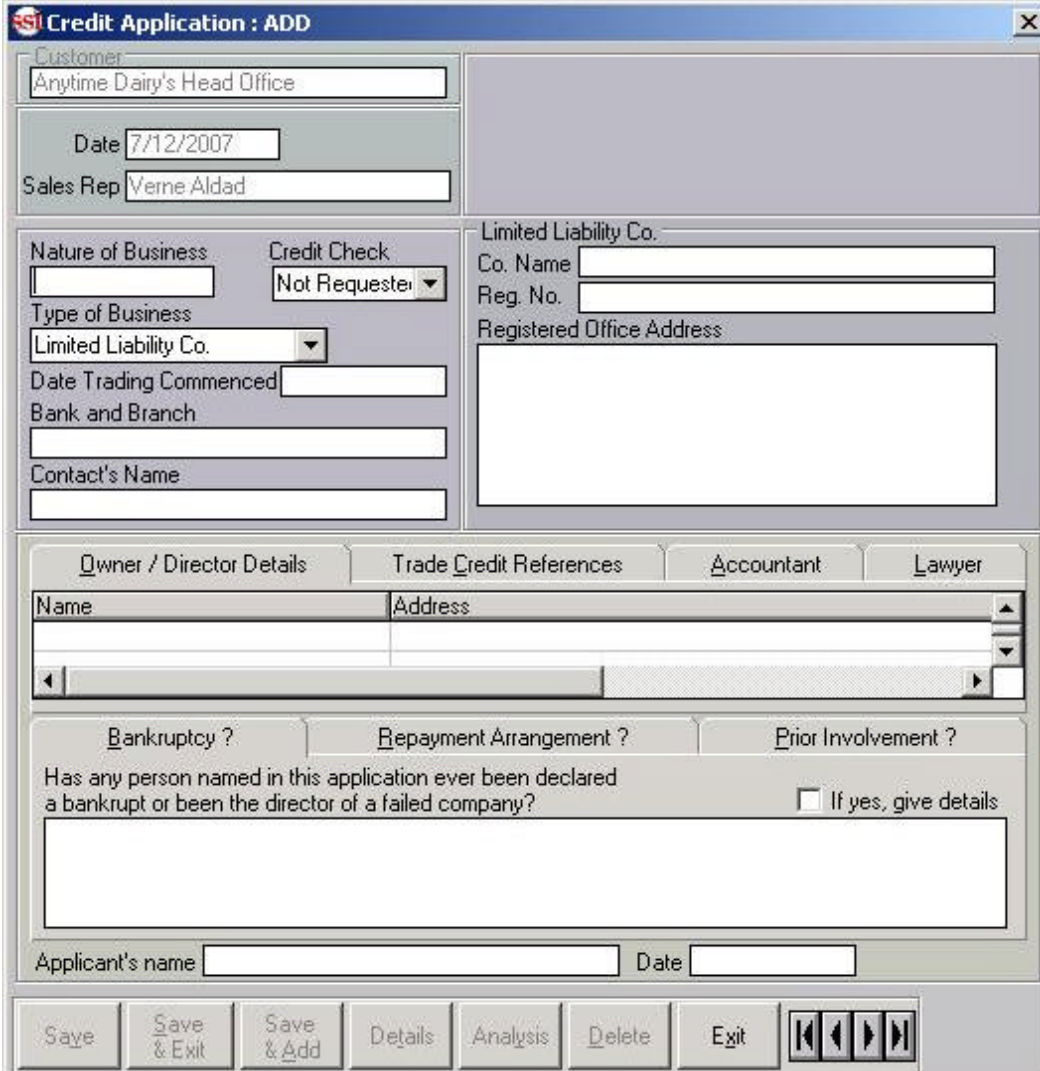
Sales Rep Notified: ☐ Date:

Save Save & Exit Save & Add Details Analysis Delete Exit

You can create new prices through a price change, either by dollar or percentage, a special price change with the further option of a date range or changing from one price book to another. You can create a new price book by clicking F8 in the price book field and clicking "Add".



## CREDIT APPLICATION



**Credit Application : ADD**

Customer: Anytime Dairy's Head Office

Date: 7/12/2007

Sales Rep: Verne Aldad

Nature of Business:

Credit Check: Not Requested

Type of Business: Limited Liability Co.

Date Trading Commenced:

Bank and Branch:

Contact's Name:

Limited Liability Co. Co. Name:

Reg. No.:

Registered Office Address:


Owner / Director Details | Trade Credit References | Accountant | Lawyer

Name:  Address:

Bankruptcy ? | Repayment Arrangement ? | Prior Involvement ?

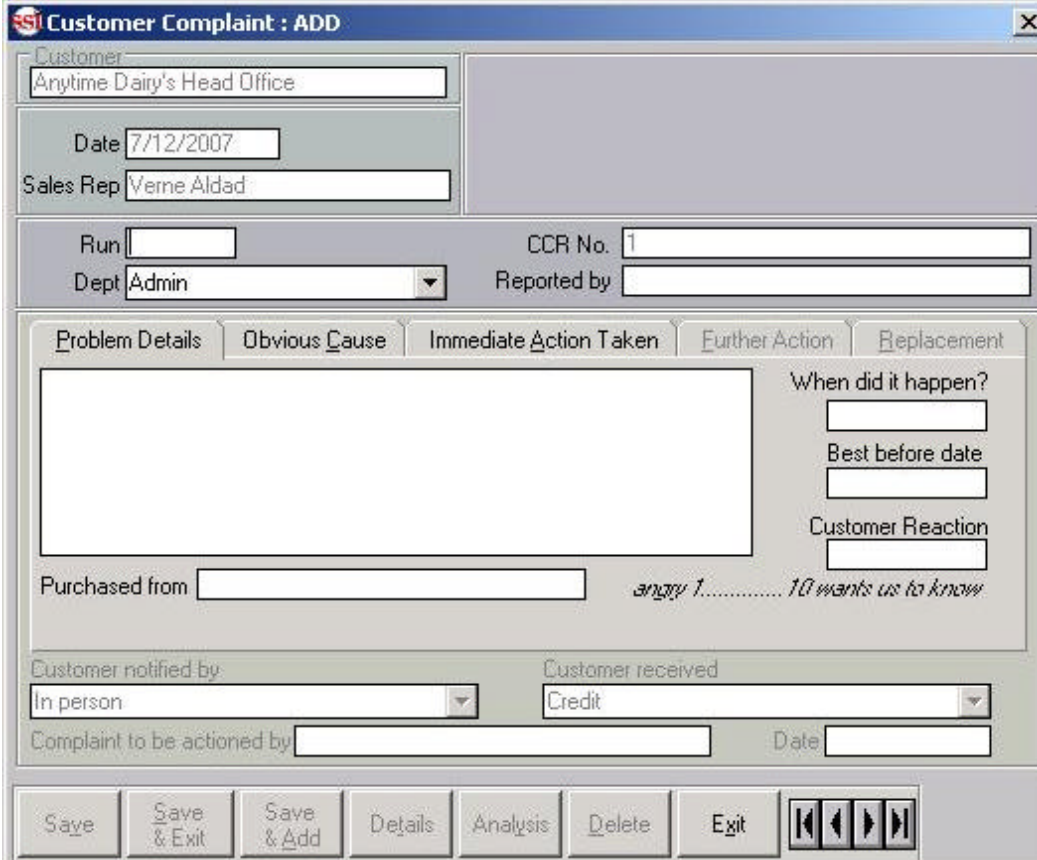
Has any person named in this application ever been declared a bankrupt or been the director of a failed company? ☐ If yes, give details

Applicant's name:  Date:

Save | Save & Exit | Save & Add | Details | Analysis | Delete | Exit | 

A credit application can only apply to a prospect. It allows you to gather information to see if the prospect is financially safe before making a decision.



**CUSTOMER COMPLAINT**

**Customer Complaint : ADD**

Customer: Anytime Dairy's Head Office

Date: 7/12/2007

Sales Rep: Verne Aldad

Run: [ ] CCR No. 1

Dept: Admin Reported by: [ ]

**Problem Details** Obvious Cause Immediate Action Taken Further Action Replacement

When did it happen? [ ]

Best before date [ ]

Customer Reaction [ ]

Purchased from [ ] *angry 1..... 10 wants us to know*

Customer notified by: In person Customer received: Credit

Complaint to be actioned by: [ ] Date: [ ]

Save Save & Exit Save & Add Details Analysis Delete Exit [Navigation Arrows]

This allows the sales rep to enter a complaint and have head office informed. It shows great detail and lets you enter information about the follow up.

EQUIP ISSUE

Equip Issue : ADD

Customer

Anytime Dairy's Head Office

Date

7/12/2007

Sales Rep

Verne Aldad

Date Required

Assets Description	Quantity

Save

Save & Exit

Save & Add

Details

Analysis

Delete

Exit

This allows the sales rep to request equipment for customers. These are customer assets and it allows tracking of assets.

STANDING ORDER

Customer  
Anytime Dairy's Head Office

Date7/12/2007

Sales RepVerne Aldad

Item Code	Finished Description	Monday	Tuesday	Wedne ..	Thursday	Friday	Sat

Save

Save & Exit

Save & Add

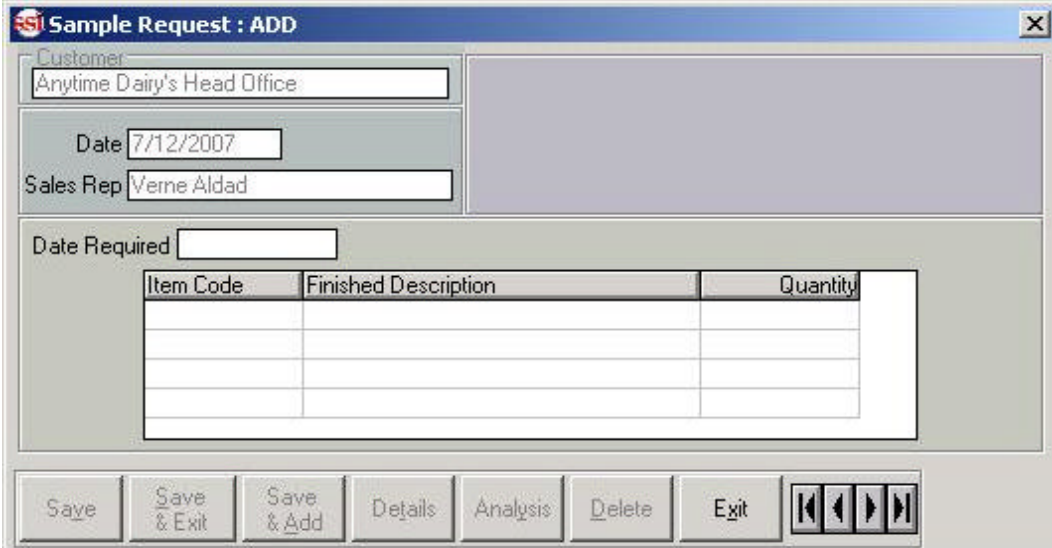
Details

Analysis

Delete

Exit

This is a request to change or add products to the customers standing order.

**SAMPLE REQUEST**

The window titled "Sample Request : ADD" contains the following fields and controls:

- Customer:** A text box containing "Anytime Dairy's Head Office".
- Date:** A text box containing "7/12/2007".
- Sales Rep:** A text box containing "Verne Aldad".
- Date Required:** An empty text box.
- Table:** A table with 3 columns: "Item Code", "Finished Description", and "Quantity". It has 4 empty rows.
- Buttons:** "Save", "Save & Exit", "Save & Add", "Details", "Analysis", "Delete", "Exit", and a set of four navigation arrows (back, forward, etc.).

This is a request to receive some sample products for trial. Samples can be set up in GlobalBake so they have no cost.

## END OF DAY

This will ask you if you want to close the oldest day.

## REVIEW DAYS

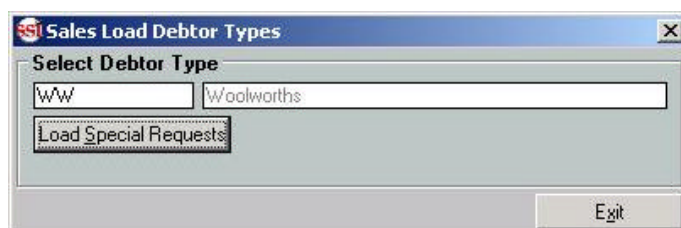
This option will show you a list of previous closed days and allow you to display them to see what happened. These cant be changed as the days are closed.

## REVIEW TEMPLATES

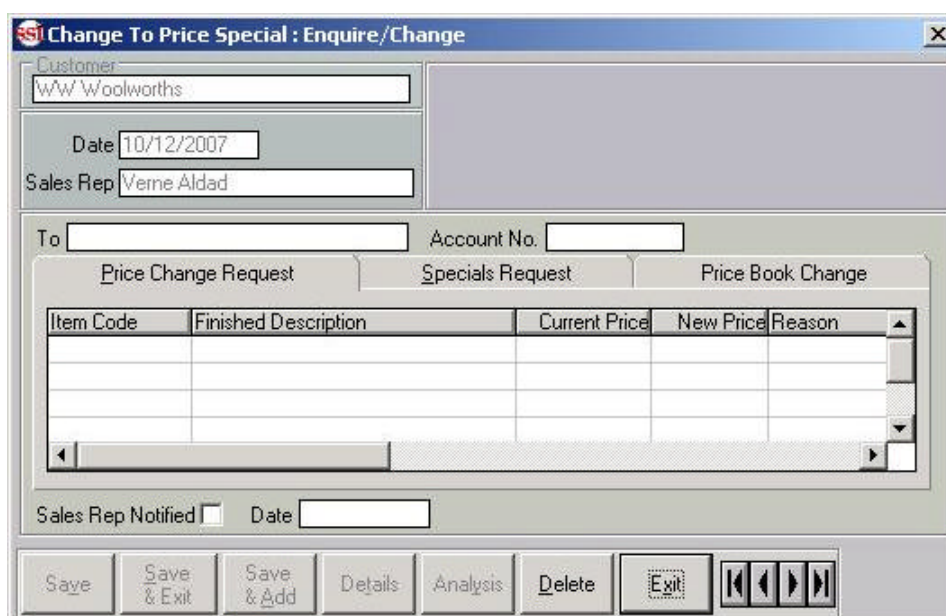


For a selected date range, you get a list of templates made. You can then click on a line and view it. If that day has been ended then you cant modify it.

## LOAD DEBTOR (CUSTOMER) TYPES



This allows you to create a price change for a group of customers, grouped by customer type.



There are several ways of creating a price change. A price change request, or a special request which differs by having a time period for the change. You can also request to be changed to a different price book. New books can be added, if you press F8 in the price book field and click add, you can create a new price book.

## FROM GLOBALBAKE

From the GlobalBake menu, select Options > Sales Rep

### VISIT CATEGORIES

These categories are for categorising fill in time on a sales rep day. You can order them and create new ones and edit existing ones.

### OPPOSITION CODES

These are the codes used for calculating prospective sales and estimating what the opposition are selling in stores. Opposition codes contain a code, name and a brief description.

### CONSTRAINT CATEGORIES

Constraint categories are categories on the prospect defining what you can identify as the reason they cant become customers. These can be added, edited and removed by the user.

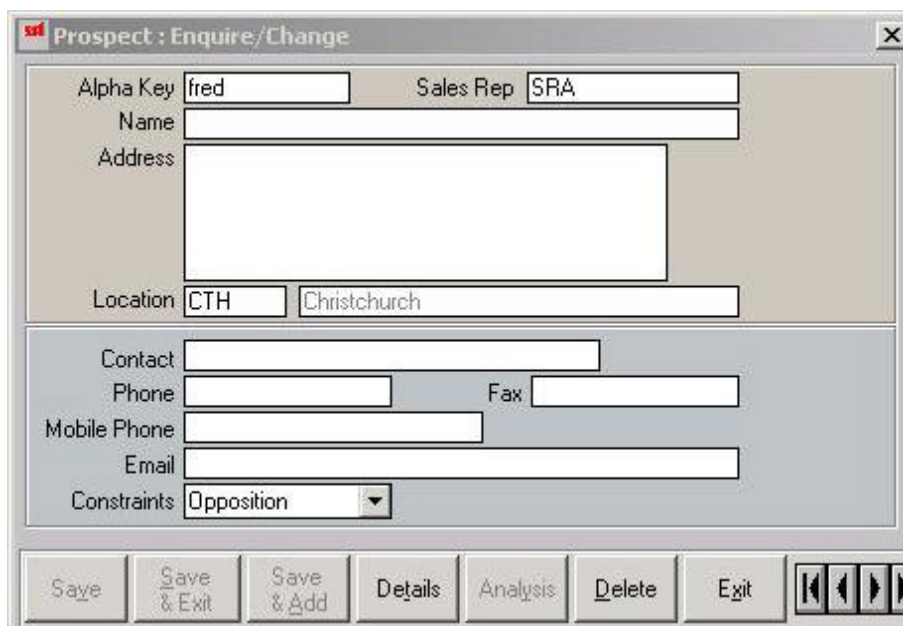
### EMAIL GROUPS

These are the email groups that the comments are sent too. You can edit and add new groups. These appear at the bottom of each comment on a sales rep visit and a tick boxes. The sales rep can select how many groups get sent the comments.



## PROSPECTS

This allows you to view, edit or add prospects for sales rep.



## SALES REP DAYS

This allows you to view all the days for the sales rep. The open days can be edited but ended days can be reviewed.

## SALES REP VISIT REPORTS

This report will show for each sales rep what customers they have visited in the date range specified.

## TEMPLATES

The last options on the Sales Rep menu are the templates. These are the requests sent from the Sales Rep. It will first show you a list of the templates, double click one to display. From here, they need to be approved (by clicking approve in the top right corner) and then processed. (process button will appear in top right corner once it has been approved).