

User Manual

Sales Funnel Management System (SFM2.0)



Developed By

Trisoft Solutions

#261, NS Complex, Triveni Road,
Gokula I Stage II Phase
Bangalore - 560 054. INDIA
Ph: +91-80-23572418
E-mail : trisoft@trisoftsol.com
Web: www.trisoftsol.com

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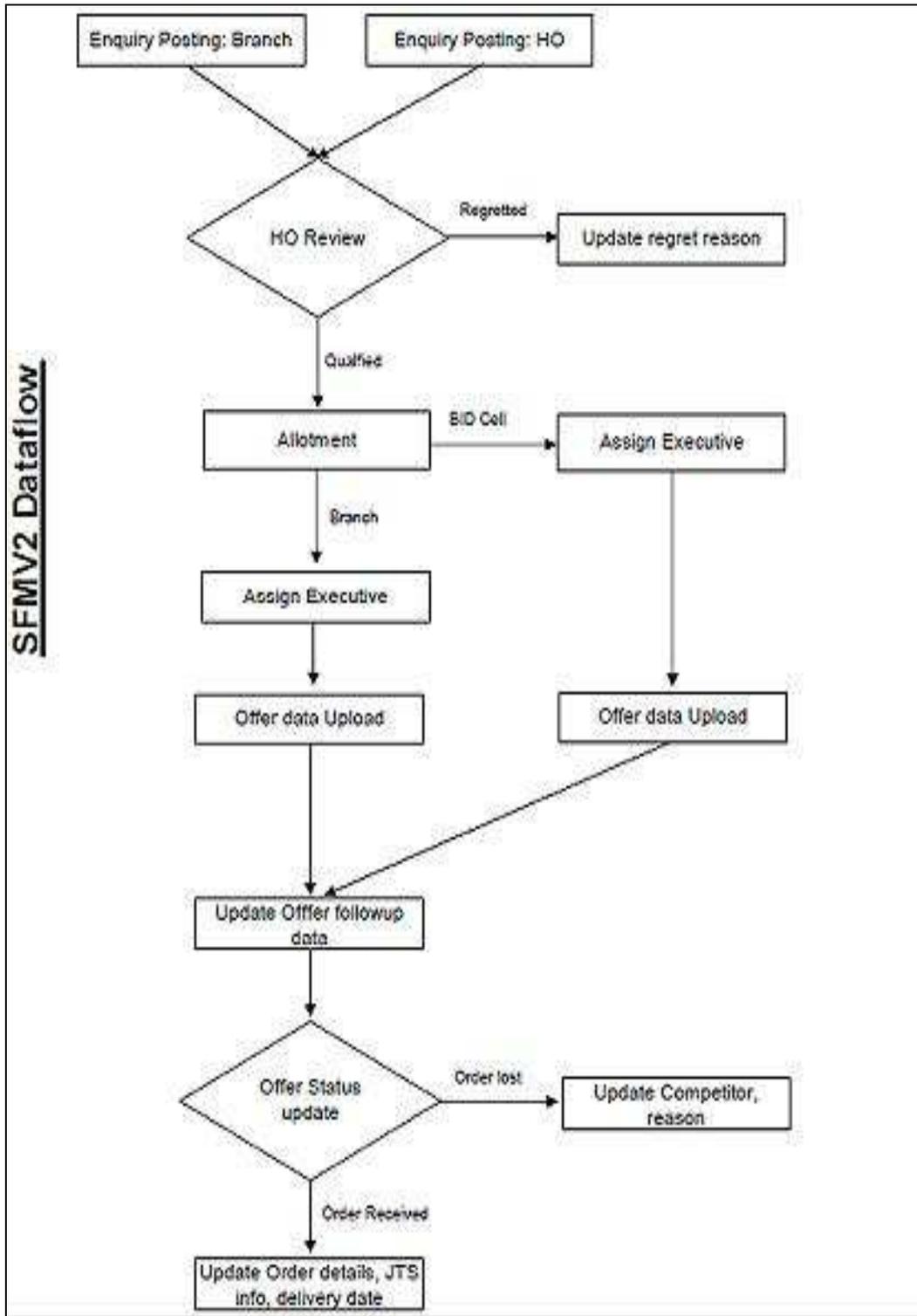
Synopsis

It is an electronic system for registering all the enquiries generated and monitoring /reviewing / tracking till its closure. An enquiry will stand closed once order received or order lost. Either of the entries to be logged against each enquiry. Order receipt entry should mandatorily have JTS No.

Scope

The system is conceived with an assumption that all locations are connected through VPN/Internet and executives/commercial managers will have access for updating and viewing the relevant information in the client server application. The database will reside in server at CACS.

Flow Chart



General features.

1. Data entry screens ensure that mandatory information are fed before clicking Save button. Save button will be enabled for clicking only after user gives all the mandatory information
2. To come out of the screen, click 'Back' button or press 'Esc' key.
3. If the list contains more information than its height, a scroll bar will appear automatically.
4. For adding new details, provide necessary information and click 'Add' Button.
5. For modifying an existing record, select the required record and make the changes. Finally click 'Modify' button to save the information.
6. Deletion of records: For this, click the required record in the details list. Now press delete key. However there will not be delete facility for critical data.
7. Certain information are shown with green background. These are not editable and provided for the sake of information only.
8. Advanced search: Search option is available for all columns of the list. For this, user has to click the header of the required column. Then filter the list by typing few characters of the required record. Also it need not be first characters.

To open the application, double click "SFM V2" icon. You need to enter correct username and password to get into the application. The username/password details will be intimated separately.

Master

Master Entries will capture the basic inputs such as Customer, Dealer, Executive and other primary inputs. The details captured here will be picked up in transactions.

Customer Master

The customer details such as Name, address, PIN, Phone, Email, Segment, Category, Type, Status will be captured. Enter the detail and click on 'Add' button to create a new customer.

SFMV2 - [Customer]

Master Administrator Branch Entry Bid Cell Entry HO Entry MIS Report Tools Help Exit

Version

Name: Phone:

Address:

Segment: Agro Industries Category: Architect

Co-op Society: Status: Prospective

Rate contract: N

Code	Name	Address 1	Address 2	Address 3	PIN	Phone	Email	Rate Contr
40002	4JEnterprises	# 25/26 Jalaguru ...	Gangamma Temple	Jalahalli ,Bangalore	560013	91-8884254679	4jenterprises@g...	N
70001	7 Star Cold Stora...	Off. B- 139,	Subzi Mandi, Aza...	Delhi	110033	09899836777	kds777lalt@gmail...	N
A0173	A B Mauri India P...	Chandmari More, ...	Kalyani	Nadia	741234	03325891684	dineshkumar@ab...	N
A0317	A B Mauri India P...	D7/2A, Lote MIDC	Taluka Khed, Dist...	Maharashtra	415722	02356272222	mma.bakshi@ab...	N
A0001	A B Mauri Pvt Ltd	No-2/15,Ganapat...	Teynampet	Chennai	600018	044-24320321_03...	yet to be modified	N
A0208	A C Gallery	XII - 694-14, Fortu...	Poothole Road, T...	Kerala	000000	0487- 2361949		N
A0197	A C Gallery, Trichur	Kerala			000000			N

Executive Master

The executives details such as Name, Designation, Email address, mobile number and location can be updated here. Option provided to set status "In Service" or "Dropped".

SFMV2 - [Executive Master]

Master Administrator Branch Entry Bid Cell Entry HO Entry MIS Report Tools Help Exit

Version

Name: Chirag Kashyap Designation: Dealer Sales

Email: chirag@rinac.com Mobile No: 9821999235

In Service: Y Location: Mumbai

Name	Designation	Email-id	Mobile No	Location	In Service
Ajay	Sr.Engineer	ajay@rinac.com	9845234209	Bid Cell	Y
Akash Singh	Executive	akash@rinac.com	9212224054	New Delhi	Y
Bijojoseph	Branch Manager	bijojoseph@rinac.com	9445009612	Chennai	Y
Chirag Kashyap	Dealer Sales	chirag@rinac.com	9821999235	Mumbai	Y
Dipendu Debnath	Manager	dipendu@rinac.com	9903889879	Kolkata	Y
Gaurav Kumar Singh	Engineer	gauravsingh@rinac.c...		Bid Cell	Y

Dealer Master

The Dealer details such as Name, contact, Email address, mobile number and location can be updated here. Option provided to set status "In Service" or "Dropped".

The screenshot shows the 'Dealer Master' window with the following details:

- Name:** Dealer
- Contact:** 9883838
- Email:** deal@deal.in
- Mobile No:** 8838938
- In Service:** Y
- Location:** Bid Cell

Name	Contact	Email-id	Mobile No	Location	In Service
Dealer	9883838	deal@deal.in	8838938	Bid Cell	Y

Primary Settings

The master list of type of company, competitors, lost reason, receipt mode, Regret reason and segment can be updated.

The screenshot shows the 'Comp Type' window with a dropdown menu open, listing the following options:

- Comp Type
- Competitor
- Lost Reason
- Mode Of Receipt
- Regret Reason
- Segment

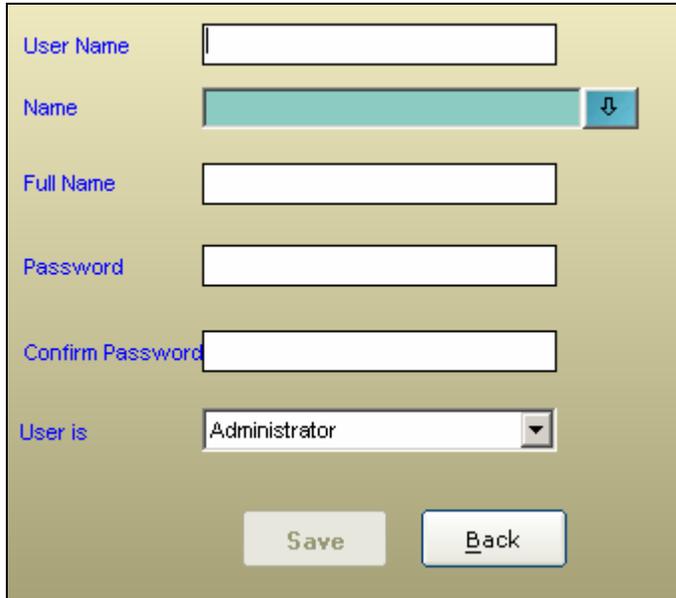
Co-op Society	
Government	
Limited	
Multinationals(Ltd/Pvt Ltd)	
Partnership Firm	
Private Limited	
Proprietorship	
PSU/Semi Government	

Administrator

Screens in Administrator are for admin functions. This menu will be available only if the user login as 'admin'

New user

Administrator can add new users in this screen

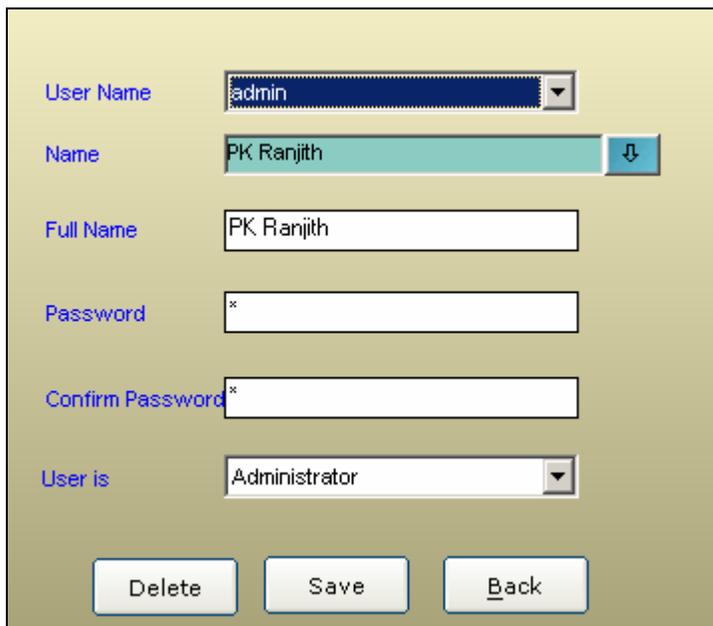


The screenshot shows a form for adding a new user. It includes the following fields and controls:

- User Name:** A text input field.
- Name:** A text input field with a teal background and a dropdown arrow icon on the right.
- Full Name:** A text input field.
- Password:** A text input field.
- Confirm Password:** A text input field.
- User is:** A dropdown menu with 'Administrator' selected.
- Buttons:** 'Save' and 'Back' buttons at the bottom.

Change Password

Administrator can reset the password in this screen

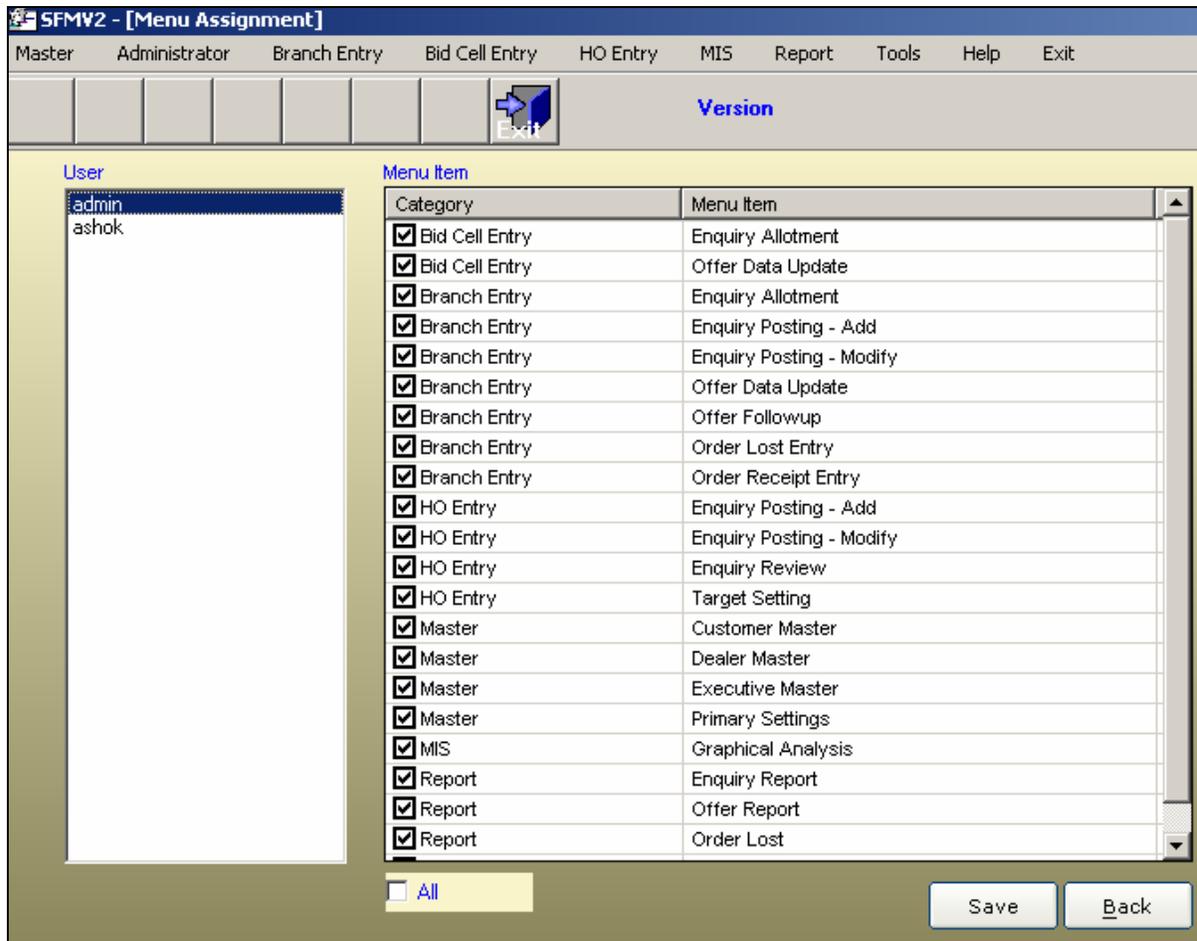


The screenshot shows a form for changing a user's password. It includes the following fields and controls:

- User Name:** A dropdown menu with 'admin' selected.
- Name:** A text input field with 'PK Ranjith' and a teal background and a dropdown arrow icon on the right.
- Full Name:** A text input field with 'PK Ranjith'.
- Password:** A text input field with a '*' character.
- Confirm Password:** A text input field with a '*' character.
- User is:** A dropdown menu with 'Administrator' selected.
- Buttons:** 'Delete', 'Save', and 'Back' buttons at the bottom.

Menu assignment

Administrator can do the menu assignment for all users. New users will not be able to use the application until administrator assigns menu for the user



Branch Entry

Enquiry Posting - Add

The New enquiries can be posted here. The Inputs are Executive, Customer, Contact person, Date, Receipt mode, Group (CS/ECS) and location. A running serial number will be automatically generated for the selected Group. Now click on "save" to update the information

The screenshot shows the SFM2.0 [Enquiry] application window. The menu bar includes Master, Administrator, Branch Entry, Bid Cell Entry, HO Entry, MIS, Report, Tools, Help, and Exit. The main area displays the 'Enquiry No' as ECS/0002/12-13. The 'Basic Data' section contains the following fields:

- Executive:** Akash Singh
- Date:** 27/Mar/2013
- Customer:** 4JEnterprises
- Group:** ECS
- Address:** # 25/26 Jalaguru Nillyam, Gangamma Temple, Jalahalli, Bangalore
- Location:** Bid Cell
- Contact Person & Designation:** Mr. Krishna
- Scope:** Cold Room
- Receipt Mode:** Dealer
- Dealer:** Dealer

A 'Save & proceed' button is located at the bottom right of the form.

Enquiry Posting - Modify

The posted enquiry can be modified and updated with the additional information such as room details, file upload and completion confirmation.

The screenshot shows the 'SFM2.0 - [Enquiry]' window. The menu bar includes Master, Administrator, Branch Entry, Bid Cell Entry, HO Entry, MIS, Report, Tools, Help, and Exit. Below the menu is a toolbar with an 'Exit' button. The main area has a 'Year' dropdown set to '2012-2013' and an 'Enquiry No' dropdown set to 'CS/0004/12-13'. There are four tabs: 'Basic Data', 'Input Spec', 'Upload File', and 'Completion'. The 'Completion' tab is active, showing a checkbox labeled 'This Enquiry is complete in all respects. The data can be used for Screening at HO' and a 'Submit' button.

Offer details Update

The Offers details can be uploaded, modified and revised in this screen. The information available are executive, location, offer no, revision, offer date, offer value, offer comments

The screenshot shows the 'SFM2.0 - [Offer Details Entry]' window. The menu bar is the same as the previous screen. The main area contains several input fields: 'Customer' (dropdown: Customer new), 'Enq No' (dropdown: ECS/0001/12-13), 'Offer No' (text: OF00012), 'Rev' (dropdown: 0), 'Offer Date' (dropdown: 26/Mar/2013), 'Offer Value' (text: 200000), 'Executive' (dropdown: Akash Singh), 'Location' (dropdown: Chennai), 'Offer comments' (text: test Entry), 'Expected finalisation date' (dropdown: 26/Mar/2013), 'Enquiry Date' (dropdown: 26/Mar/2013), and 'Group' (dropdown: ECS). There are radio buttons for 'Modify' (selected) and 'Revise'. At the bottom are 'Attach', 'Save', and 'Back' buttons.

File attachment can also be updated for each revision.

Offer follow up entry

The follow up details of the offers can be updated here.

SFMV2 - [Offer Followup Entry]

Master Administrator Branch Entry Bid Cell Entry HO Entry MIS Report Tools Help Exit

Version

Select Customer: A N Traders(JAL) Offer No: OF NO

Offer Date: 23/Mar/2013 Offer Value: 1003 Expected finalisation: 23/Mar/2013

Executive: Wilson Geroge Location: Kolkata Offer comments: pc revision 3 mod rev 4

Customer: A N Traders(JAL)
Rampaa Centre Point
Model Town Market
Jalandarnagar

Followup Details

Followup Details	Date
ACTION	21-Mar-13
ACTION 2	21-Mar-13
ACTIO N3	21-Mar-13 9:34:10 ...
ACTION 4	21-Mar-13 9:34:34 ...
ACion 5	24-Mar-13 8:27:21 ...
test	26-Mar-13 6:56:30 ...

Buttons: Add, Worksheet, Back

Order Receipt entry

The receipt of order can be updated here. Input are JTS No, customer PO, Del date, order value can be updated.

SFMV2 - [JTS Order Update]

Master Administrator Branch Entry Bid Cell Entry HO Entry MIS Report Tools Help Exit

Version

Customer: fCustomer new JTS No: jts

Customer PO: cust po Del date as/PO: del

Offer: OF00012 PO Date: 27/Mar/2013

Order Val-Basic: 1000 Order Val-Total: 333

Location: Chennai Type: Supply Billing By: Branch

Buttons: Add

JTS No	Val	PO No	PO Date	Del Date as/PO

Dialog Box: Order Details will be saved. Are you sure? Yes No

Order lost entry

The lost entry can be updated here. Lost to, Reason, Lost value can be updated here.

The screenshot shows the 'Order Lost Entry' window with the following details:

- Customer:** A N Traders(JAL), Rampaa Centre Point, Model Town Market, Jalandarnagar
- Offer:** OF NO
- Lost To:** ACME, Adiarrest, BEARDSSELL, BLUE STAR, CALIFORNIA HUMIFRESH, CARRIER, CARYAIRE, CELCIUS, CLESTRA, FABTECH, FMC, **FOSTER**, FRICK, GM PARTITION, ICLEAN, ICDM, IZOPOLI
- Reason:**
 - High Price
 - Quality constraints
 - Delivery constraints
 - High volume to handle
 - Prejudice / Biased
 - Beyond our scope
 - Inadequate follow up
 - Import constraints
 - Export constraints
 - Foreign Trade Policy constraints
 - FOREX rate fluctuation
 - Risk of payment
 - Logistics constraints
 - New Market
 - Perfect Substitute
- Comment:** COM
- Lost Value:** 3000

Enquiry allotment

The qualified enquiries can be allotted to executives.

The screenshot shows the 'Enquiry Review' window with the following table data:

User	Computer	Date/Time	Desc
admin	ACER	27-Mar-13 10:38:26 PM	CS/0010/12-13 0 Posted on A B Mauri India Pvt Ltd

Bid Cell Entry

Enquiry allotment

The enquiries can be reviewed in this screen.

User	Computer	Date/Time	Desc
admin	ACER	27-Mar-13 10:38:26 PM	CS/0010/12-13 0 Posted on A B Mauri India Pvt Ltd

HO Entry

Enquiry review

Enquiries can be reviewed at HO level here.

User	Computer	Date/Time	Desc
admin	ACER	27-Mar-13 10:38:26 PM	CS/0010/12-13 0 Posted on A B Mauri India Pvt Ltd

Double click the entry, review the entries and assign entries to respective executive.

If entry is not in scope then it can be regretted.

The screenshot displays the SFM2.0 [Enquiry] application window. The title bar reads "SFM2.0 - [Enquiry]". The menu bar includes "Master", "Administrator", "Branch Entry", "Bid Cell Entry", "HO Entry", "MIS", "Report", "Tools", "Help", and "Exit". Below the menu bar is a toolbar with several icons, including an "Exit" button. The main content area is titled "Enquiry No" and contains the text "CS/0010/12-13". Below this, there are four tabs: "Basic Data", "Input Spec", "Upload File", and "HO Review". The "HO Review" tab is active. Inside this tab, there is a "Status" dropdown menu set to "Qualified". Below that, there is an "Assigned to" dropdown menu set to "Bid Cell" and a "Remarks" text area. At the bottom right of the form, there is an "Update" button.

Enquiry Posting - Add

The New enquiries can be posted here. The Inputs are Executive, Customer, Contact person, Date, Receipt mode, Group (CS/ECS) and location. A running serial number will be automatically generated for the selected Group. Now click on "save" to update the information

The screenshot displays the SFM2.0 [Enquiry] application window. The title bar reads "SFM2.0 - [Enquiry]". The menu bar includes "Master", "Administrator", "Branch Entry", "Bid Cell Entry", "HO Entry", "MIS", "Report", "Tools", "Help", and "Exit". A toolbar contains an "Exit" button. The main content area shows the "Enquiry No" as "ECS/0002/12-13". The "Basic Data" tab is active, displaying the following fields:

Executive Akash Singh	Date 27/Mar/2013
Customer 4JEnterprises # 25/26 Jalaguru Nillyam Gangamma Temple Jalahalli ,Bangalore	Group ECS
Contact Person & Designation Mr.Krishna	Location Bid Cell
Scope Cold Room	
Receipt Mode Dealer	
Dealer Dealer	

A "Save & proceed" button is located in the bottom right corner of the form area.

Enquiry Posting - Modify

The Posted enquiry can be modified and updated with the additional information such as room details, file upload and completion confirmation.

Room Details: Name of the room and specification for the standard parameters can be updated here.

SFMV2 - [Enquiry]

Master Administrator Branch Entry Bid Cell Entry HO Entry MIS Report Tools Help Exit

Version

Year 2012-2013

Enquiry No CS/0004/12-13

Basic Data Input Spec Upload File **Completion**

This Enquiry is complete in all respects. The data can be used for Screening at HO

Submit

Target Setting

Yearly target for each branch wise, group wise can be updated here.

SFMV2 - [Target Setting]

Master Administrator Branch Entry Bid Cell Entry HO Entry MIS Report Tools Help Exit

Version

Year 2012-2013 View

Sl No	Location	Group	SPR Target	Booking Tar...
1	Bid Cell	CS	0	0
2	Bid Cell	ECS	0	0
3	Bangalore	CS	0	0
4	Bangalore	ECS	0	0
5	Kolkata	CS	12000	34000
6	Kolkata	ECS	0	0
7	Pune	CS	0	0
8	Pune	ECS	0	0
9	Ahmedabad	CS	0	0
10	Ahmedabad	ECS	0	0
11	Chennai	CS	0	0
12	Chennai	ECS	0	0
13	New Delhi	CS	0	0
14	New Delhi	ECS	0	0
15	Secunderabad	CS	0	0
16	Secunderabad	ECS	0	0
17	Cochin	CS	0	0
18	Cochin	ECS	0	0
19	Mumbai	CS	0	0
20	Mumbai	ECS	0	0
21	HO	CS	0	0

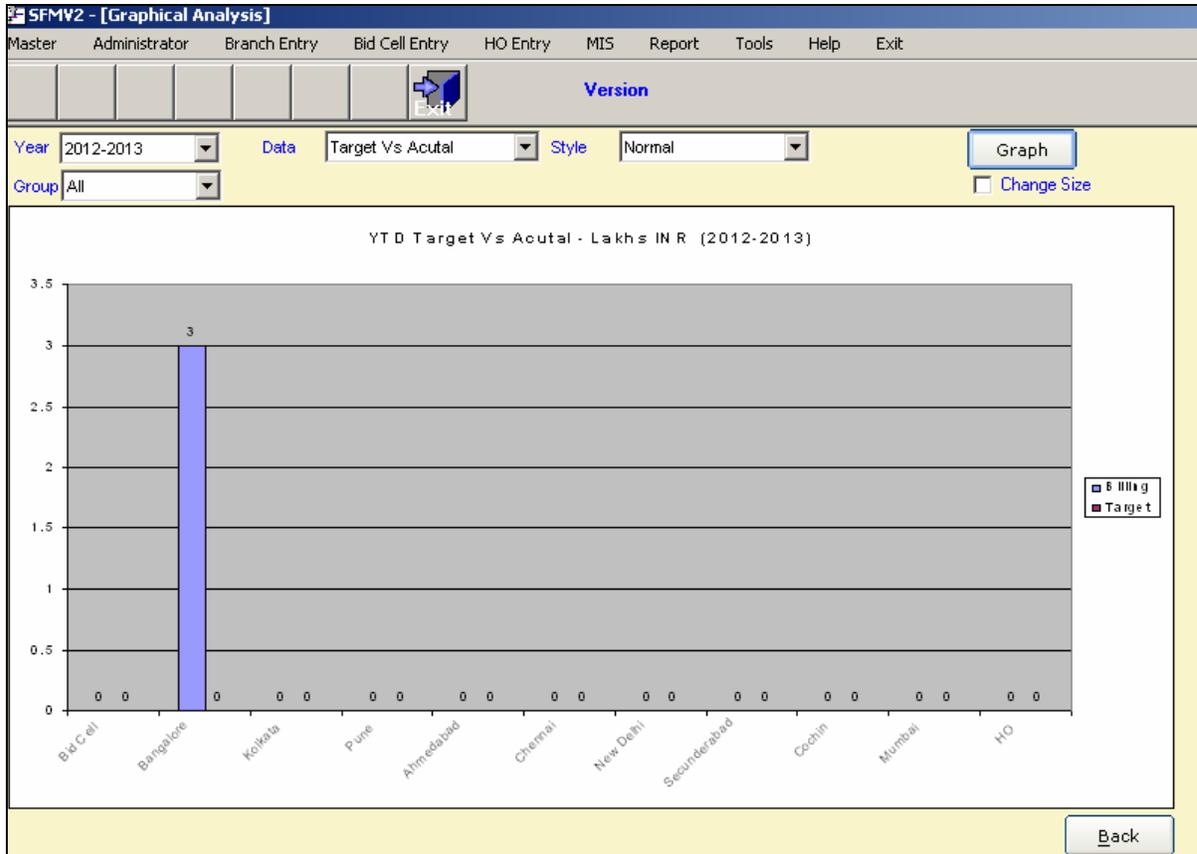
Branch Ahmedabad SPR Target Update HTML CSV Back

Group CS Booking Target

MIS

Graphical Analysis

Target Vs Actual



Reports

Enquiry Status

Enquiry status report: filters available are customer, date range, zone, location, group, status

SFMV2 - [Enquiry Status]

Master Administrator Branch Entry Bid Cell Entry HO Entry MIS Report Tools Help Exit

Version

Zone: All | Group: All | From: 01/Mar/2013 | Customer: All

Location: All | Executive: All | To: 27/Mar/2013

Status: All

View

Sl No	Customer	Eng No	Date	Executive	Location	Group	Status	Reviewed by	Review on
1	A C Gallery, Trichur	CS/0001/12-13	20-Mar-2013		Bangalore	CS	Qualified	PK Ranjith	25-Mar-13 12:0...
2	A N Traders(JAL)	CS/0002/12-13	20-Mar-2013	Wilson Geroge	Bangalore	CS	Qualified	PK Ranjith	20-Mar-13 7:24...
3		CS/0003/12-13	21-Mar-2013			CS			
4	A N Traders(JAL)	CS/0004/12-13	22-Mar-2013		Chennai	CS	Qualified	PK Ranjith	22-Mar-13 1:35...
5	A&N Hotels	CS/0005/12-13	25-Mar-2013			CS	Qualified	PK Ranjith	25-Mar-13 12:0...
6	Aarkay Food	CS/0006/12-13	25-Mar-2013		Bid Cell	CS	Qualified	PK Ranjith	25-Mar-13 12:2...
7	A Rose Hyderabad Food Court	CS/0007/12-13	25-Mar-2013	M.V Sowmya Naidu	Bid Cell	CS	Qualified	PK Ranjith	25-Mar-13 10:1...
8	A& B Associates	CS/0008/12-13	25-Mar-2013		Bid Cell	CS	Qualified	PK Ranjith	25-Mar-13 10:5...
9	1Customer new	ECS/0001/12-13	26-Mar-2013	Ajay	Bid Cell	ECS	Qualified	PK Ranjith	26-Mar-13 6:27...
10	4Enterprises	CS/0009/12-13	27-Mar-2013	Akash Singh	Bid Cell	CS			
11	A B Mauri India Pvt Ltd	CS/0010/12-13	27-Mar-2013	Akash Singh	Bid Cell	CS			

Offer report

Offer Report: Filters available are customer, date range, zone, location, group, status

SFMV2 - [Offer Report]

Master Administrator Branch Entry Bid Cell Entry HO Entry MIS Report Tools Help Exit

Version

Zone: All | Executive: All | From: 01/Mar/2013 | Customer: All

Location: All | To: 27/Mar/2013

View

Sl No	Customer	Offer No	Rev	Date	Value	Executive	Click to view Data, as per selection	Eng Ref	Followup
1	A&N Hotels	offer for cs 005	00	25-Mar-2013	120000		Mumbai	Offer made	CS/0005/12-13
2	Aarkay Food	off no	01	25-Mar-2013	240000		Bid Cell	Offer made	CS/0006/12-13
3	A Rose Hyderabad Food Court	offer cs007	00	25-Mar-2013	250000		Bid Cell	Order Received	CS/0007/12-13
4	A& B Associates	o009	00	25-Mar-2013	250000		Bid Cell	Offer made	CS/0008/12-13
5	1Customer new	OF00012	00	26-Mar-2013	200000	Akash Singh	Chennai	Order Received	ECS/0001/12-13
6	A N Traders(JAL)	OF NO	05	23-Mar-2013	1003	Wilson Geroge	Kolkata	Order Lost	CS/0004/12-13

Order Receipt Report

Order Receipt report: Filters available are customer, date range, zone, location, group, status

SFMV2 - [Order Receipt Report]

Master Administrator Branch Entry Bid Cell Entry HO Entry MIS Report Tools Help Exit

Version

Zone: All | Customer: All | PO Date From: 01/Apr/2012 | Executive: All

Location: All | To: 27/Mar/2013

Group: All

View

Customer	Offer No	JTS No	PO No	PO Date	Basic Order Val	Tot Order Val	Sup/Install	Del Date as/PO
A Rose Hydera...	ECS/0001/12-13	JTs 001	custo po	25-Mar-2013	100,000	120,000	S	12/Apr/13 ie 15 days ...
1Customer new	CS/0010/12-13	Jts	cust po	27-Mar-2013	1,000	333	S	del
					101,000	120,333		

Order Lost Report

Order lost report: Filters available are customer, date range, zone, location, group, status.

SFMV2 - [Order Lost Report]

Master Administrator Branch Entry Bid Cell Entry HO Entry MIS Report Tools Help Exit

Version

Zone: All | Customer: All | From: 01/Apr/2012 | Executive: All

Location: All | To: 27/Mar/2013

Group: All

View

Sl No	Customer	Offer No	Date	Offer Val	Lost To	Reason	Reason 2	Lost Value	Comment
1	A N Traders(JAL)	OF NO	23-Mar-2013	1,003	FOSTER	Inadequate fol...	Export constrai...	3,000	COM
				1,003				3,000	

Tools

Following tools are available for the users.

- Customise
- Calculator
- Calendar

Customise

This is for setting the background colour. Once you set a colour, the same colour will appear until you change it. This is a personalized setting and hence the selection of the colour you are making will be applicable for your login only.

There are 2 choices for colour settings

1. Default colour setting.

By clicking on this you can set windows default colour for the background.

2. Change Background colour:

By clicking this you will be getting a colour pallet. Select the colour of your choice. This colour will be the background colour there after.

Calculator

Calculator for your arithmetic/Scientific calculations.

Calendar

A Calendar with week number is available.

Help

Help section contains the following information

- Contents
- About

Contents

This help file will give the details about this application.

About

Following necessary information are available here.

Developer Info:

By clicking this button you can get information about the creator of this software.