



Deal Management

In **Reseller ADVantage**, every Order begins as a Deal. This is true whether it is a phone call from someone looking for prices to a large order resulting from a formal presentation that takes months and multiple bids to close.

1. As with Contacts and Accounts, complete search functions are provided so that you can find deals in areas of the country, by specific companies or contacts (both internal and external) and by date searching.

2. This screen has the usual **New**, **Edit**, and **Delete** functions, plus a **Copy** function. Use this feature to create a new deal with the identical information as an older one. This is particularly useful for times when a company is placing complex orders which are similar to ones previously completed.

The best way to understand how the deal process works is to see you how it is done.

To do that, click **New**, and the Deal Workbook opens up.....

Reseller Advantage

File Reports Window Help

Attachments Schedule/Mail Contacts Accounts Deal Sales Orders Products

Search for Deals By...

Status: All Number: Account or Contact Last Name Search Clear

Zip: Owner: Date Searching

Started Closed Expected to Close Between Start End Select Dates From Periods

Deals Matching Search Criteria ...

Account	Description	Number	Start Date	By:
Computer Shoppers	HP VECTRA VL7 MT P2/3334.0GB 64MB LAN w/9	JCAREY3078731503	07/24/98	JCAREY
ArrowRing Industries	OEM SOLUTIONS MAINTENANCECONTRACT	KBABIAK3079778258	08/05/98	KBABIAK

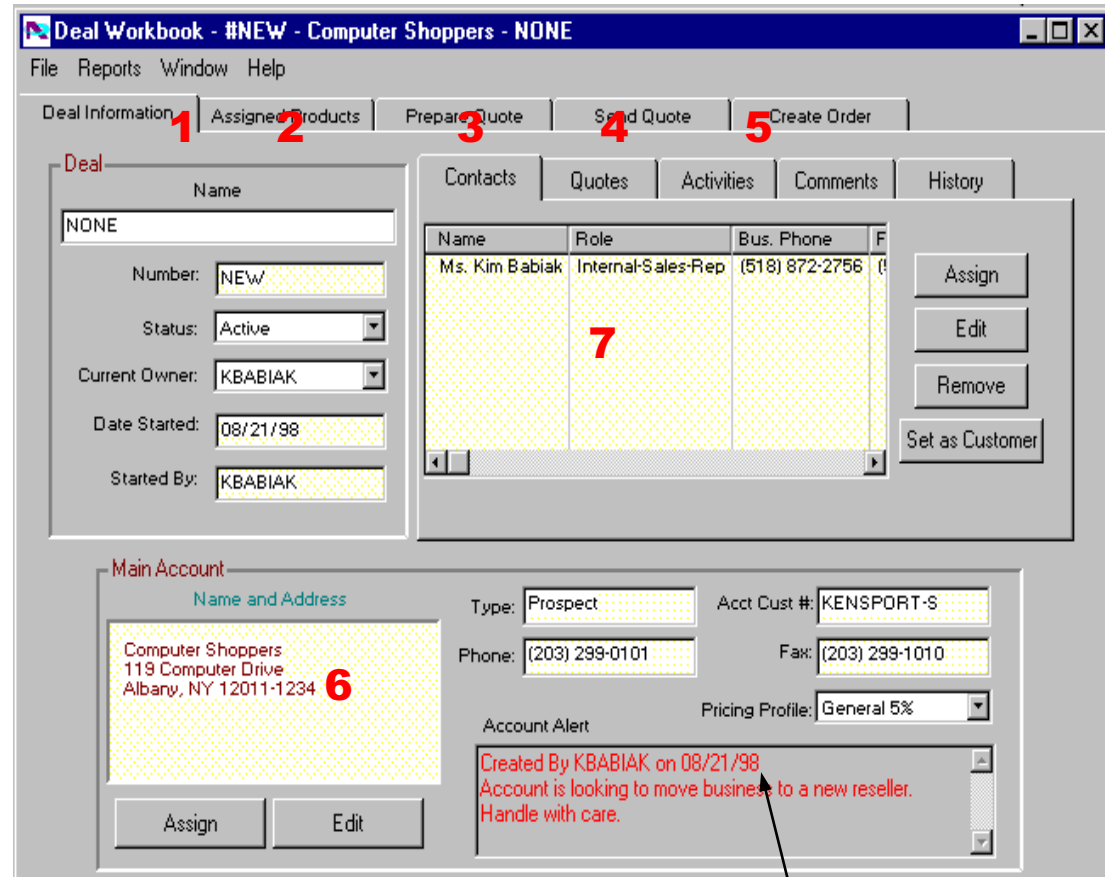
New Edit Copy Delete Deal Alerts

Import

3. The **Deal Alerts** displays important and timely information about the selected (highlighted) Deal. It is a good practice to connect to the central server (synchronize) before a meeting or call to get customer, deal, product, and contact updates, so that there are "no surprises". For example, if this account was upset about his last order, it would be good to know that going in to a presentation.

Computer deals can be complicated, both in content and in process. The steps involved are:

1. *Gathering the Key Contact and Account Information.*
 2. *Starting a quoting process by identifying, selecting, assigning, and pricing products and services.*
 3. *Preparing the quote by selecting pre-defined paragraphs and/or adding new text specific to each quote.*
 4. *Sending the quote to the customer.* You can automatically print, fax or send the fully customized quote via electronic mail. the quote is then "locked" and cannot be changed.
 5. *And turning the quote into an order, which once sent, is also "locked" to retain an accurate picture of your transaction.*
 6. Once an account is selected (by clicking **Assign** and searching for the account), they are displayed with their default Bill-To address. If a deal is started from the Contact or Account Processing Screen the displayed contact or account will automatically be entered in the deal.
- If this is a new account you will be given the opportunity to add them from the Find Account Screen.



The screenshot shows the 'Deal Workbook' window for a new deal. The interface is divided into several sections:

- Deal Information:** Contains fields for Deal Name (NONE), Number (NEW), Status (Active), Current Owner (KBABIAK), Date Started (08/21/98), and Started By (KBABIAK).
- Contacts:** A table listing contacts with columns for Name, Role, and Bus. Phone. One contact, Ms. Kim Babiak, is listed with the role 'Internal-Sales-Rep' and phone number '(518) 872-2756'. A red '7' is overlaid on this section.
- Main Account:** Contains account details such as Name and Address (Computer Shoppers, 119 Computer Drive, Albany, NY 12011-1234), Type (Prospect), Acct Cust # (KENSPO-S), Phone, Fax, and Pricing Profile (General 5%).
- Account Alert:** A red text box stating 'Created By KBABIAK on 08/21/98. Account is looking to move business to a new reseller. Handle with care.'

7. You can see the Deal-At-A-Glance by tabbing through this section.

This display area will contain any critical information you need to know about the customer.

1. When building a deal, first give it a descriptive name.

2. This area contains the ID of the user who started the deal, when it was started, and the current owner. *(Note: Owners and Group members are the only users authorized to change a deal.)*

3. Assign a contact to the deal by clicking **Assign**, which opens the Find Contact Screen.

(Note: when you select Contacts into deals you will be presented with a Role Assignment box.)

4. Select the right role for each person and it will be easy to see the players and their responsibilities after the fact.

(The system will automatically record all users who work on or approve a deal or quote, and assign the appropriate role in each transaction.)

5. Finally, select the account (the person or company who is actually paying the bill). Remember, if a Contact is buying it for themselves with their own funds, they become the Account. This is recorded by highlighting the Contact in the Contacts listing, clicking **Set As Customer**, and answering the confirmation dialog that opens. You can also set the Contact's company as the customer using this method.

The screenshot shows the 'Deal Workbook - #NEW - Computer Shoppers - NONE' window. It has a menu bar (File, Reports, Window, Help) and a toolbar with buttons for Deal Information, Assigned Products, Prepare Quote, Send Quote, and Create Order. The main area is divided into sections:

- Deal Information:** Contains fields for Name (LIGHTWAVE 3D V5.5 INTELSINGLE 1-), Number (NEW), Status (Active), Current Owner (KBABIAK), Date Started (08/21/98), and Started By (KBABIAK).
- Contacts:** A table listing contacts with columns for Name, Role, and Bus. Phone. Ms. Kim Babiak is listed as an Internal-Sales-Rep. To the right of the table are buttons for Assign, Edit, Remove, and Set as Customer.
- Main Account:** Contains fields for Name and Address (Computer Shoppers, 119 Computer Drive, Albany, NY 12011-1234), Type (Prospect), Acct Cust # (KENSPO-S), Phone ((203) 299-0101), and Fax ((203) 299-1010). There are also buttons for Assign and Edit.
- Account Alert:** A text box containing the message: 'Created By KBABIAK on 08/21/98. Account is looking to move business to a new reseller. Handle with care.'

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The 'Role Assignment' dialog box is shown. It has a title bar and a close button. The text inside says 'Select a Role for:' followed by a text input field containing 'Steve Miller'. Below that is '(Options)' followed by a dropdown menu currently showing 'Key Contact'. At the bottom is an 'OK' button.

Once the contact and account information is set, identify the hardware and software products they are interested in. This is done from the Assign Products tab, and is initiated by clicking **Assign Products** (see Assign Products on next page).

1. The Quote Bar - Displays the number of the quote you are working on (a deal can have an unlimited number of quotes), a short description, and has buttons to start a new quote, copy or delete the one you are viewing (a "sent" quote cannot be deleted, and you must be the deal "owner" to delete any quote).

2. Groups - All line items are selected into groups which are displayed here. Group name and quantities can be changed.

3. The Selected Items Listing - Contains 1 line entry for each product and service within the selected group. From this list you can change the Group, Quantity, Cost, Price, Uplift or Distributor. For access to all product distributors and current pricing/availability right click on the desired line entry.

4. Running Totals Area - keeps a running total of the items selected, the prices your company pays, the prices quoted, and gross profits.

If you know either the manufacturer's or distributor's part number, you may use them to insert those products directly into the quote.

Uplifts can be globally increased or decreased from here. Enter the number and click on the UP (increase) or DOWN (decrease) arrow.

To remove an item from the quote click **Remove**. If you can not find a required product or service you can add one temporarily by clicking **New**. This allows a quote to be sent even if the product is not in the database.

The Select Products Screen

After clicking **Assign Products**, the Find Products Screen opens. Here products and services are located, selected, and assigned to specific distributors.

1. Products and Services Categories and Sub-Categories: This includes a listing of product Categories and Sub-Categories. Double-clicking on any item with a "+" will display related sub-categories.

2. Item Searching: Clicking **Search** starts a database search that lists all items in the category or sub-category you selected or all products that have a part number that starts with the part number you entered. (If you cannot locate an appropriate category, contact your Systems Administrator for assistance. If for some reason an item is not listed, you can add a temporary item using the Add Temp button on the assign products page)

3. Narrowing your search: In some cases you may wish to limit the items viewed. This can be done by selecting a manufacturer, a part name (partial entry is OK), a "Cost Less Than" amount, or only from a specific distributor and clicking **Apply Limit**.

4. Viewing Distributors: Click the right mouse button while any line item is highlighted and a window will open that displays all the product distributors with related information like cost and availability. For up-to-the-minute prices and availability click on *Avail by Whse* and the system will retrieve and display the current price and number available using the distributors online system.

5. Viewing Attachments - Clicking **Attach-**

Find Products

Search For Products By
Manufacturer: [HEWLETT PACKARD PERIPHERALS]

Limit Products By
Manufacturer: [HEWLETT PACKARD PERIPHERALS]
Part Name Contains: []
Cost Less Than: []
Distributor: []
 Show Available Only
3 Apply Limit

Product Hierarchy

- Accessories & Supplies..
- Computer Telephony...
- Computers/Terminals...
- Educ Novell...
- Education...
- Enhancement Products.
- Input Devices
- Audio Input Devices.
- Bar Code Scanners...
- Camera Imaging...
- Graphics Tablets...
- Image Scanners
- Film Scanner
- Flatbed Color 50
- Flatbed Color un
- Flatbed Monochi
- Flatbed Monochi

or by Part # (SKU):
 Mfg SKU or Dist SKU

Search **2** Clear

Products Meeting Limit or Search Criteria - (Right Click for Distributors)

Se	Part #	Manufactur	Part Name	Dist Cost	# Avail	Distributor
20	C13094#AI	HEWLETT	HP NET SCANJET 5	2308.72	0	Merice1
21	C1310A#AI	HEWLETT	HP NET SCANJET 5	2308.72	-3	Merice1
22	C1307A#AI	HEWLETT	HP NET SCANJET 5	2164.38	12	Merice1
23	C1308A#AI	HEWLETT	HP NET SCANJET 5	2308.72	0	Merice1

Qty: 1 Grp: 1 **6** Assign **5** Attachments OK

Distributor	Dist Part #	Dist Cost	Cust %	Cust Cost	Gr Profit	# Avail	Updated On	Description
Merice1	68656	268.41	G 5.0%	282.54	14.13	-15	05/04/98 08:21:59 PM	

4

ments when an item is highlighted opens the Product Attachments box where additional product information can be obtained (e.g. schematics, pictures, and extended descriptions).

6. Selecting items - Clicking **Assign** when an item is highlighted places it into the Quote. If you wish, you can assign quantities and assign them to specific group, which is helpful for keeping different configurations separated.

Once selected all items are listed on the Assigned Products Page.

1. Depending on preset authorization levels, you can change quantity, distributor costs, sales pricing, and change distributors.
2. When you have identified the products, set your prices, and determined the distributor, the next step is to Prepare the Quote. This involves wrapping the right textual information around the product items and personalizing it for your account. Select the Prepare Quote tab.

Deal Workbook - #NEW - Computer Shoppers - NONE

File Reports Window Help

Deal Information Assigned Products **Prepare Quote** 2 Send Quote Create Order

Quote 1 of 1 Description LIGHTWAVE 3D V5.5 INTELSINGLE 1-DOC New Copy Delete

Grd	Group Header	Qty	Items	Cost (eal)	Ext Cost	Avg %	Bid Price	Ext Bid	Gr Profit
1	Software	1	1	255.57	255.57	4.99	269	269	13.43
2	Printers	1	1	268.41	268.41	5.16	283	283	14.59
3	Scanners	1	1	317.77	317.77	4.86	334	334	16.23

Grd	Part # (SKU)	Qty	Description	Cost (eal)	Ext Cost	Uplift	Bid Price	Ext Bid	Gr Profit	# Avail	Distrib
2	C5119A#AB#	1	HP SCANJET 5P MAC	268.41	268.41	5.16	283	283	14.59	-15	1-Me

Mfg Part # or Dist Part #

# Items	Ext Cost	Avg Uplift	Ext Bid Price	Gross Profit
3	\$841.75	5.0033	\$886.00	\$44.25

Assign Products Attachments New Remove Refresh % Comm \$2.32

Before printing and faxing quotes, additional textual information is typically needed. For example you may want to specify how long the quote is good for, limit your legal liability, and include statements about how everything on the quote can change at any time.

You can:

1. Select and edit pre-defined paragraphs.
2. - 3. "Drag-n-drop" paragraphs into "Introductory Text" and "Concluding Text" windows.

(Depending on system options, you can edit and add new paragraphs and text information in both the Preset Responses and the Introductory Text and Concluding Text windows.)

4. During the product selection process any "groupings" were automatically assigned system names (e.g. Group Number 1, etc.). You can change these names by simply typing over the Group Header so that they will better reflect your account's order.

Next you move on to the Send Quote or Create Order tab.

(Note: *If your customer has not made the "buy" decision, go to the Send Quote tab, otherwise go to the Create Order tab.*)

Deal Workbook - #NEW - Computer Shoppers - NONE

File Reports Window Help

Deal Information Assigned Products Prepare Quote Send Quote Create Order

Quote 1 of 1 Description LIGHTWAVE 3D V5.5 INTELSINGLE 1-DOC New Copy Delete

Send Quote to: Mr. David Ouimette

Introductory Text

Dear [Contact]

Here is the quote you requested. Please contact me if you have any questions. 2

Group Headers

Group #	Group Header
1	Software
2	Printers
3	Scanners

4

Concluding Text

Thank you for considering Advantage Software. We look forward to working with you and your company. Due to the nature of the software industry all prices are subject to change. 3

Pre-Set Responses

'Dear Customer'

'Thank You'

'Subject to Change'

1

Drag and Drop responses into text boxes

Edit

The Send Quote page provides a recap of the quote, it's complete history, and all supporting attachments (spec sheets, etc.). The key information areas are:

1. Company name and Deal name.
2. Quote number and Description.
3. Who the quote is being sent to.
4. Prices, profit, taxes, and shipping costs.
5. The quote history.
6. Additional printed information to send out with quote (Attachments)

When ready to send it, click **Print/Send Quote**, and a list of quote formats is displayed (9). Select a quote format from the list or use the View from File option to locate and use your own.

Based on the quote format either a Crystal report viewer or MS Word will be used to Review, E-Mail, Print or Fax the quote.

*If the **Total Amount** is more than your approval limit then the **Send Quote** button will be disabled and the **Route for Approval** will be enabled. You will need to route the quote for approval before you can send it.*

Sending the quote is irreversible, so you are presented with a confirmation dialog (7). If you select YES, the deal is sent out and all of the information is locked -- forever -- guaranteeing an accurate picture of the quote for future processing and reference.

7. When the quote is created, sales reps are asked to estimate close date and % to close, which keeps an accurate forecast for this and all deals.
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1. Microsoft Word

Microsoft Word uses DOT template files to create quotes and reports. From here you can Print, Fax or E-Mail the report or quote. Reseller will then ask you to "Confirm Quote Status". Check what action was taken, this will then be stored in history.

GBS Computer and Communication System
 1035 N. Meridian Road
 Youngstown, OH 44509-1016
 (333) 797-2700... FAX (330) 797-2724

QUOTATION

Date Sent: 08/21/98... **Valid Until:** 09/20/98

Computer Shoppers 119 Computer Drive Albany, NY 12011-1234	Quote #: KBABIAK3081153117 - 1 Attention: Mr. David Quinette Phone #: (914) 773-7000 Fax #:
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Dear Mr. Quinette,

Here is the quote you requested. Please contact me if you have any questions.

Qty	Part #	Description	Unit Price	Total
1	LNTIL4AS	ELA INOCULAN SGL SVR NTARC SERVE OPT	\$269.00	\$269.00
1	C8119AWABA	HP SCANJET 5P MAC	\$283.00	\$283.00
1	82411901	ML390 TURBO 312CPS DOTPR NARROW 120V	\$334.00	\$334.00
			SUBTOTAL	\$886.00
			SALES TAX	\$62.02
			SHIPPING & HANDLING	
			OTHER	
			TOTAL	\$948.02

Thank you for considering Advantage Software. We look forward to working with you and your company. Due to the nature of the software industry all prices are subject to change.

Sincerely,
 Ms. Kim Babiak

The Create Order Page

When a customer *confirms* that they want to close the deal, the quote must become an order. This involves clicking the Create Order tab, and:

- 1. Review/Enter Account Bill-to** information by identifying, selecting and assigning Bill-to account, Bill-to account address, Ordered By, Payment Methods and Customer PO# or Credit Card #.

- 2. Review/Enter Account Ship-to** information by identifying, selecting and assigning Attention to, Shipping Methods, Shipping Costs, Partial Shipment options and any special shipping instructions.

- 3. Edit Bill/Ship-to**, click this button for access to all billing, shipping and payment information. Select the payment method, which can be whatever is allowable by your company. Typically it is by User PO#, Cashiers Check or Money Order, or Credit Card. In the case of the User's PO#, log it in the Customer's PO# field. For credit card, select the type and enter the number and expiration date.

- 4. Shipping Information**, select the Ship Type and the Ship Method. Each item can be either shipped to your location or directly to the customer (Drop Ship). Also if your distributor allow direct fulfillment (ITT) you can specify this as well.

Costs Summary:

Our Cost	Avg Uplift	Customer Price
\$841.75	5.0033	\$886.00
Tax Code T7	Freight % 7.0	Freight \$25.00
	Tax	\$62.02
	Total	\$973.02
Commission	Gross Profit	\$44.25

Part # (SKU)	Distributor	Distrib. Part	Ship Type	Ship Method	Status	Qty	Bid Price	Ext Bid	Description
LNTIL4AS	1 - MicroAge	CYE-S-90037	Regular-Ship	UPS Blue Label		1	269	269	ELA INOCULA
C5119A#ABA	1 - Micel	68656	Regular-Ship	UPS Blue Label		1	283	283	HP SCANJET
62411901	2 - Ingram	596402	Regular-Ship	UPS Blue Label		1	334	334	ML390 TURBC

1. Create Order

To create the order, click **Create Order**, and all required order information is verified. An error dialog will be displayed if there are any errors.

2. Unavailable Products

All products that do not have enough in stock items to fill the order are shown allowing you to cancel and split the items or continue and backorder them.

Creating an order is irreversible so a confirmation dialog is displayed. **(3)**

4. Select Administrator

The final option is to select which administrator will process your order. The list will contain all users that have create order security access. The order will then show up in that administrators order in-box for processing.

Bill-To
 Computer Shoppers
 119 Computer Drive
 Albany, NY 12011-1234
 Acct Cust #: KENSPORT-S
 Ordered By: Mr. David Quimette
 Pay Method: Purchase-Order
 PO # - 554897

Ship-To
 Computer Shoppers
 119 Computer Drive
 Albany, NY 12011-1234
 Acct Cust #: KENSPORT-S
 Attention: Mr. David Quimette
 Ship Method: UPS Blue Label
 Expected: 10/10/98

Buttons: Create Order¹, Reports, Edit Bill/Ship-To, Additional Info

Product #	Order Qty	Qty In-Stock	Product Name
110985	1	0	Install Networ
F1338A	2	0	EXTERNAL E
F1189B#ABA	2	0	OMNIBOOK !

Buttons: Continue, Cancel

Please Confirm:
 Quote has not been sent yet. Once Quote is sent and the Order created, all fields are locked and cannot be changed. Do you want to continue?

Buttons: Yes³, No

Select Administrator
 Select the Administrator this order should be handled by:

Dropdown: GUEST

Button: OK

