SALES REP

This module needs to be purchased and registered on GlobalBake. Please contact GlobalBake for purchase information.

The Sales Rep module is a management tool for Sales Reps and Administrators to communicate efficiently. It allows Sales Reps 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

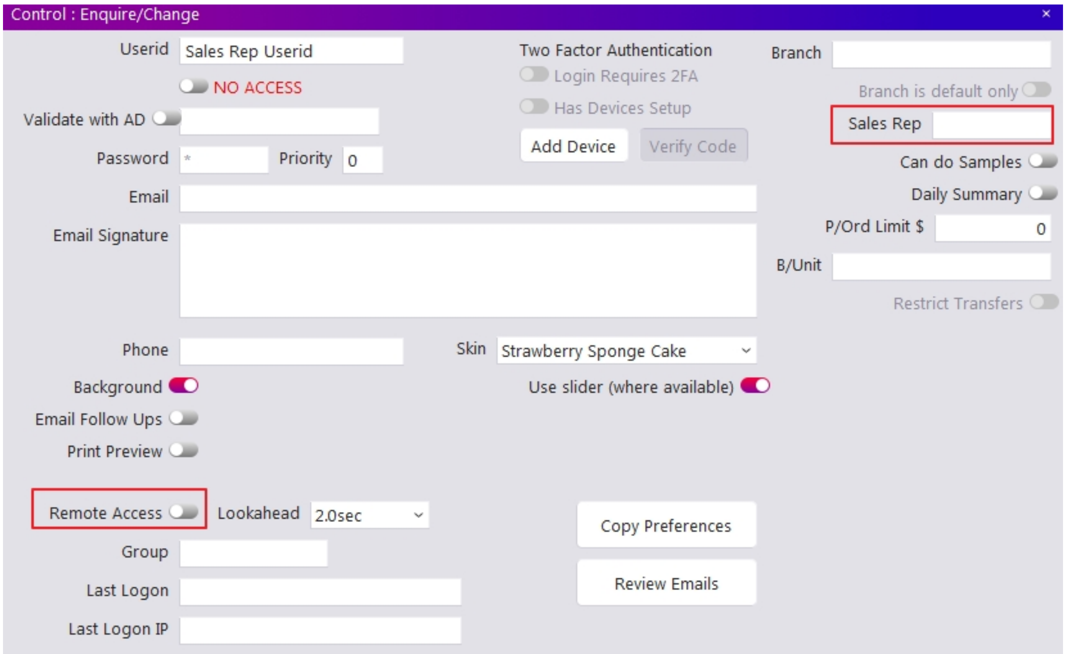
RUNNING SALES APPLICATION

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 linked to their customers on the main customer set up sheet as per the below image. This linkage creates the sales representative relationship with the customer.

The final link is to associate 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 > User File menu item for the appropriate user as shown below.
As the rep is logging in remotely, remote access should also be enabled.



See: http://www.globalbake.com/help/Downloads/General/UserFile.pdf

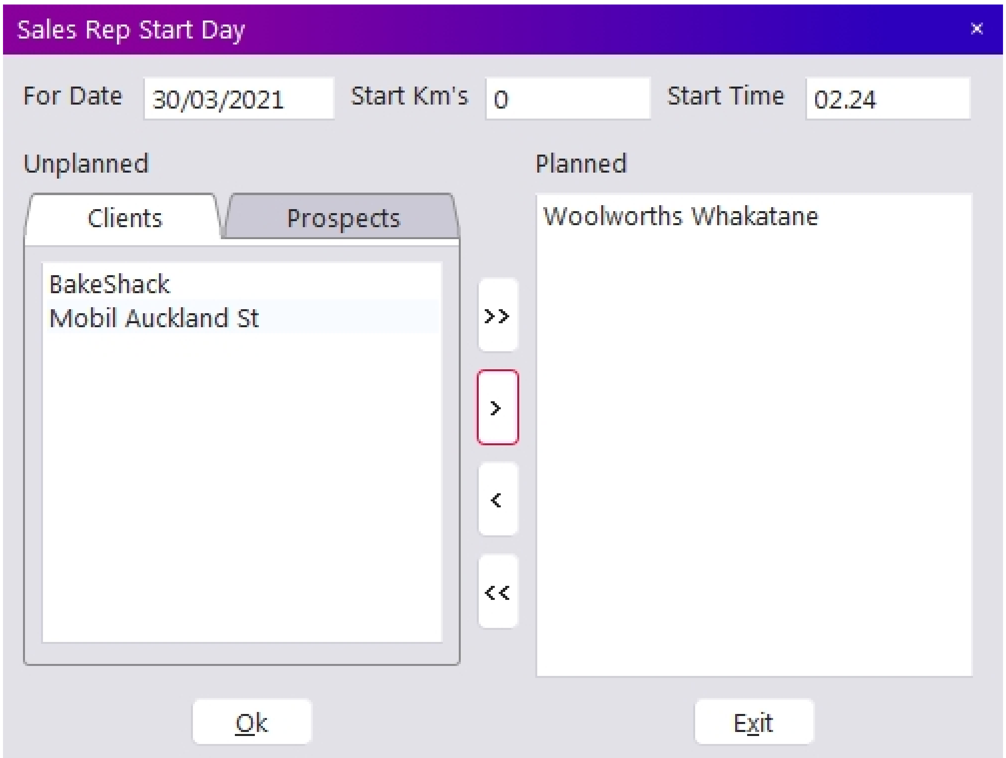
With these settings configured the user will be able to use the functions described below within the Sales application.

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/her 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.

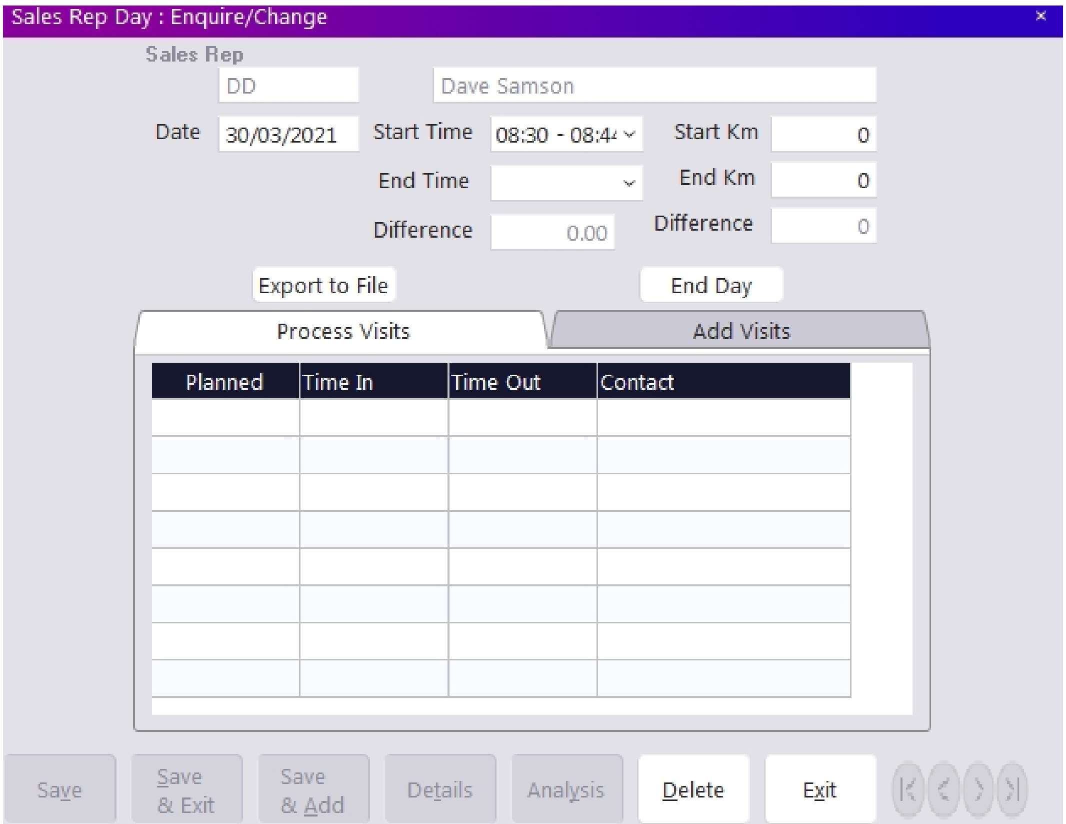
From main menu Daily > Start of Day



LOAD VISIT

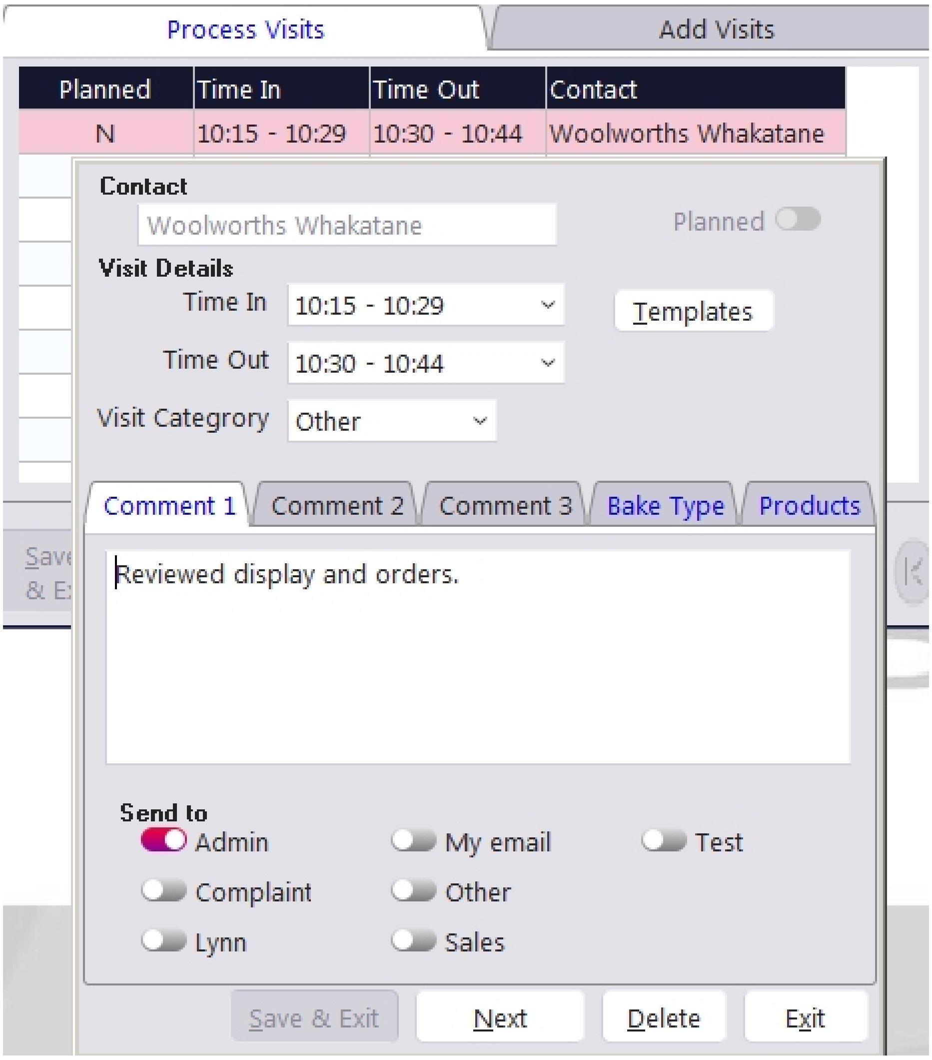
Once a day has been created you can load more visits. If you have multiple days started then you will have a screen to select the specific day.

From main menu Daily > Load visit



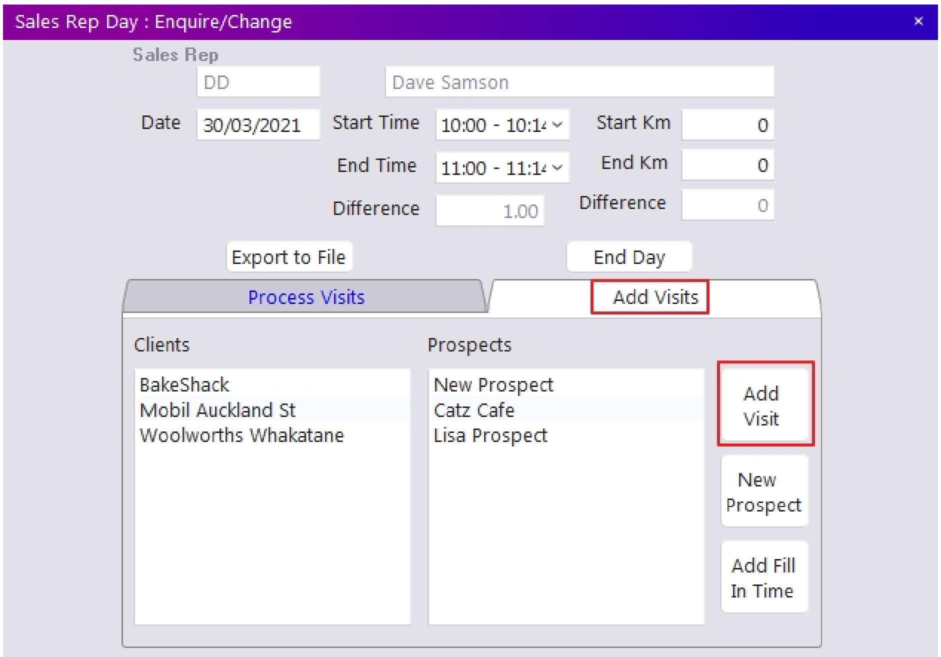
PROCESS VISITS

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.

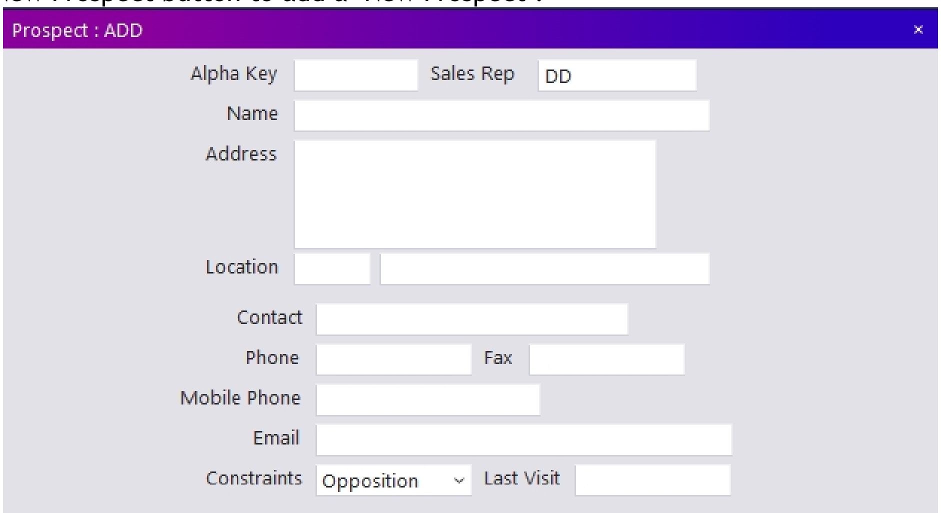


ADD VISITS

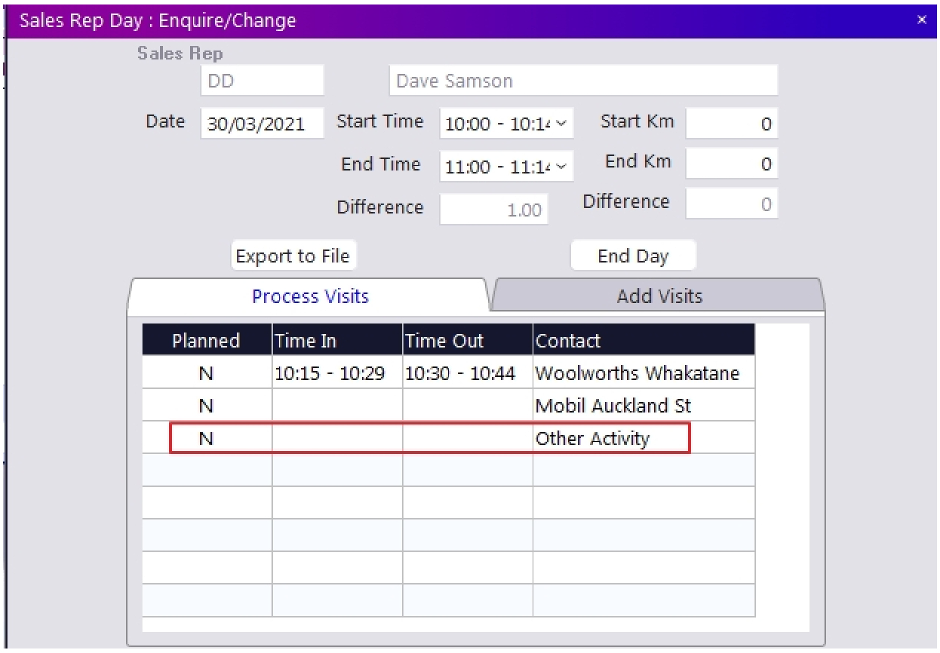
This allows you to add more visits for the day.
By selecting a client or prospect then clicking "Add visit", it will create a new line for that client under "Process visits" which can now be edited.



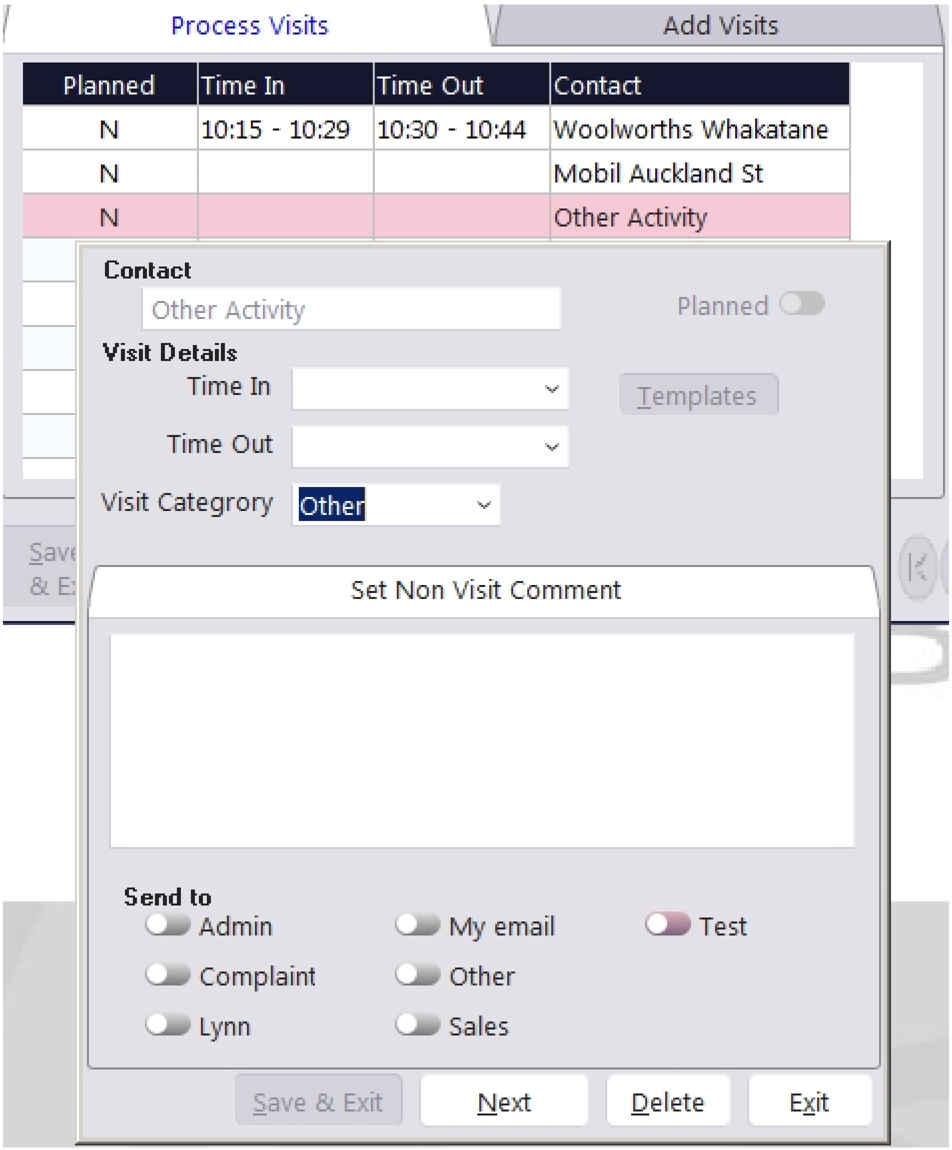
Use New Prospect button to add a "New Prospect".



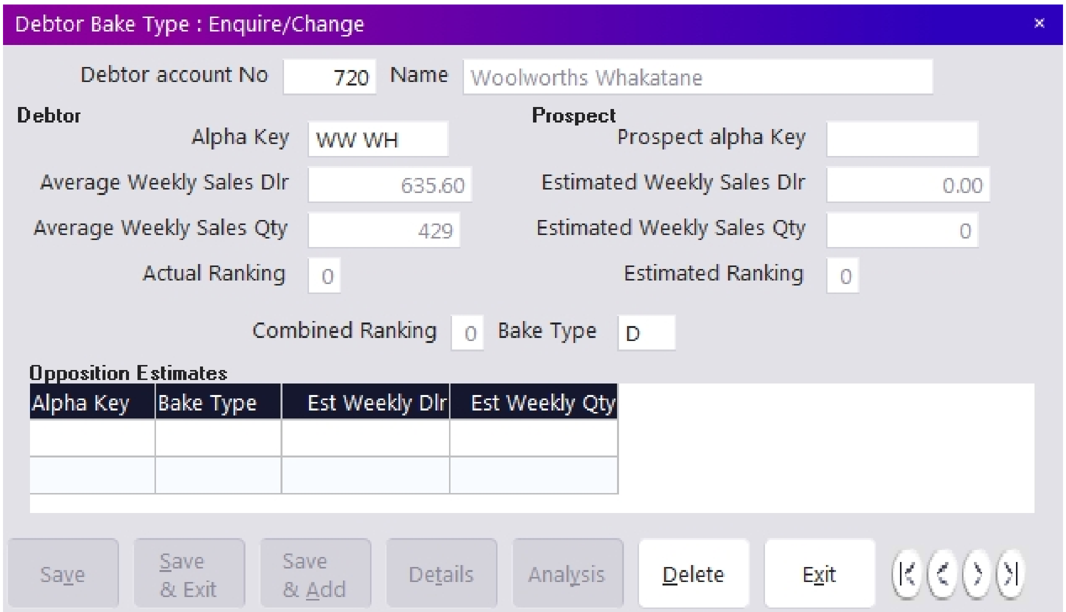
The "Add Fill In Time" button adds a line on the Process Visits tab.



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.



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.

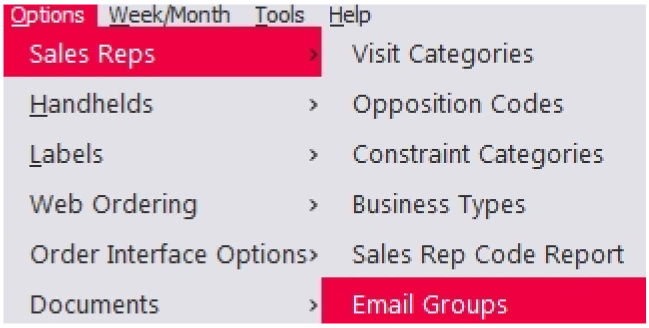


You can see the average weekly figures for that customer and that bake type. You can then add opposition estimate, this will help you see the potential for more sales.

TEMPLATES

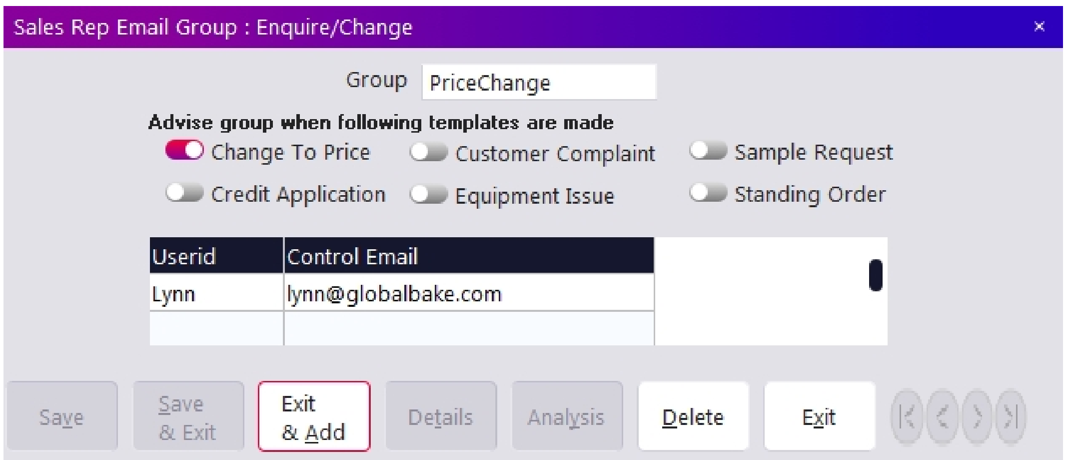
Templates are the requests, from each client, for a change. This screen allows you to add new email groups for comments, show you email comments sent and add or edit templates.

In GlobalBake Options > Sales Reps > Email Groups

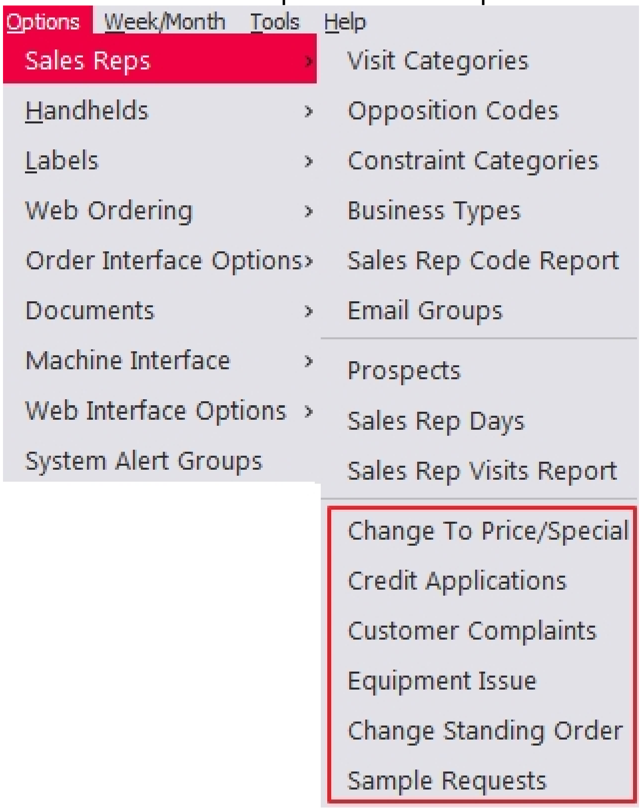


Use the Add button to add a new email group, or display and edit an existing group.

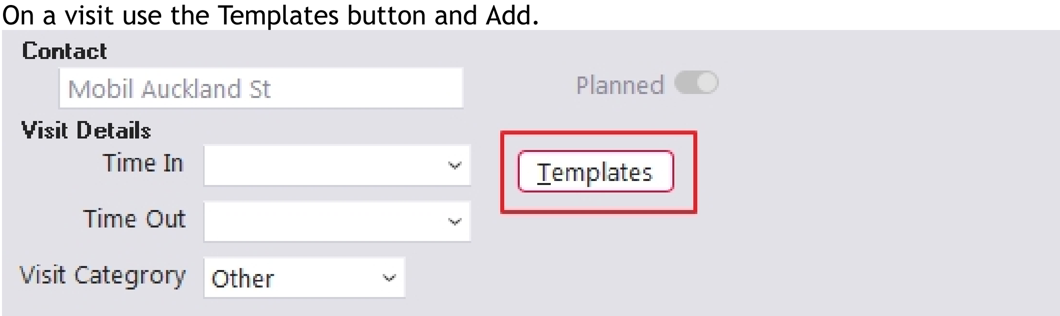
Select a name for the group. Select what templates they get notified for and add users by clicking on the lines below "Control Userid". This is their username in GlobalBake. Once saved, this group will appear as a tick box below the comment field on the visit form.

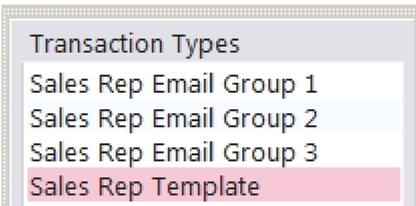


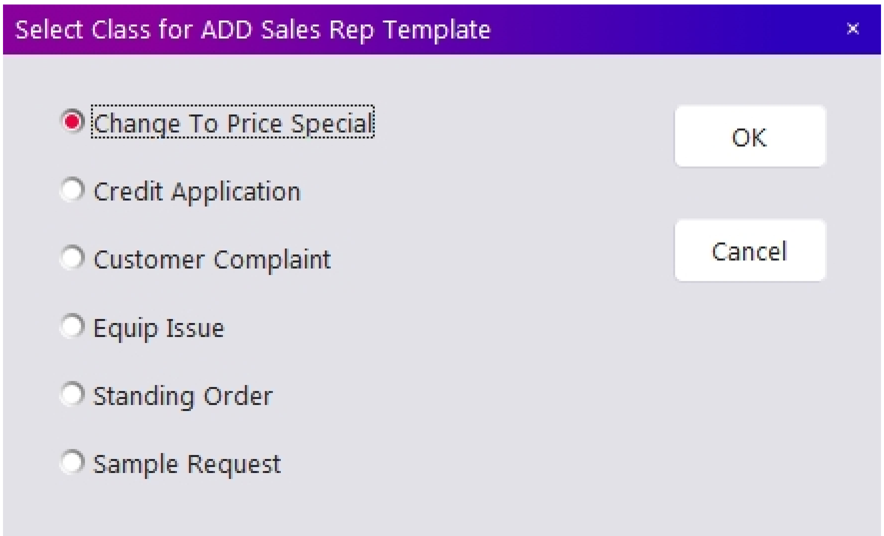
Template requests can be viewed from Options > Sales Reps



On a visit use the Templates button and Add.

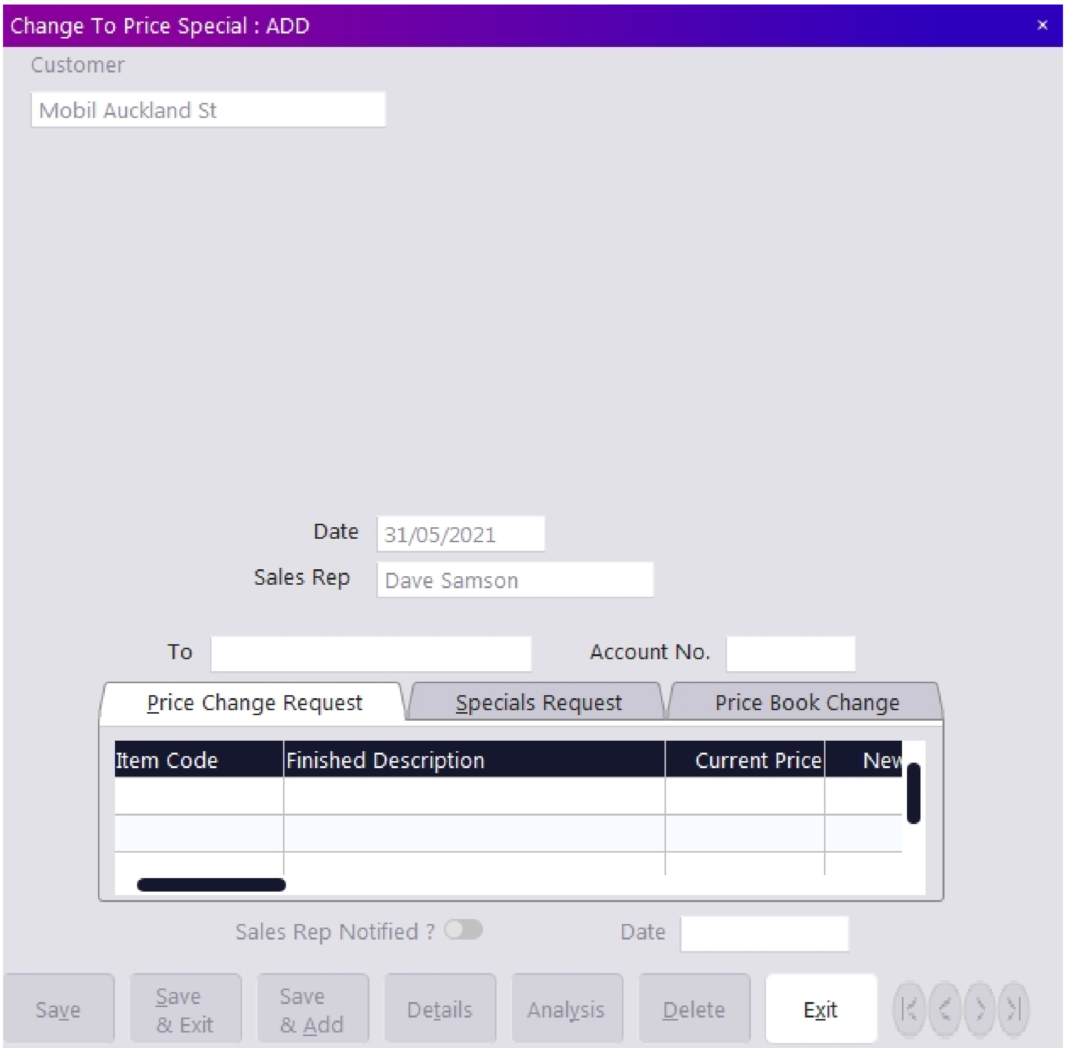






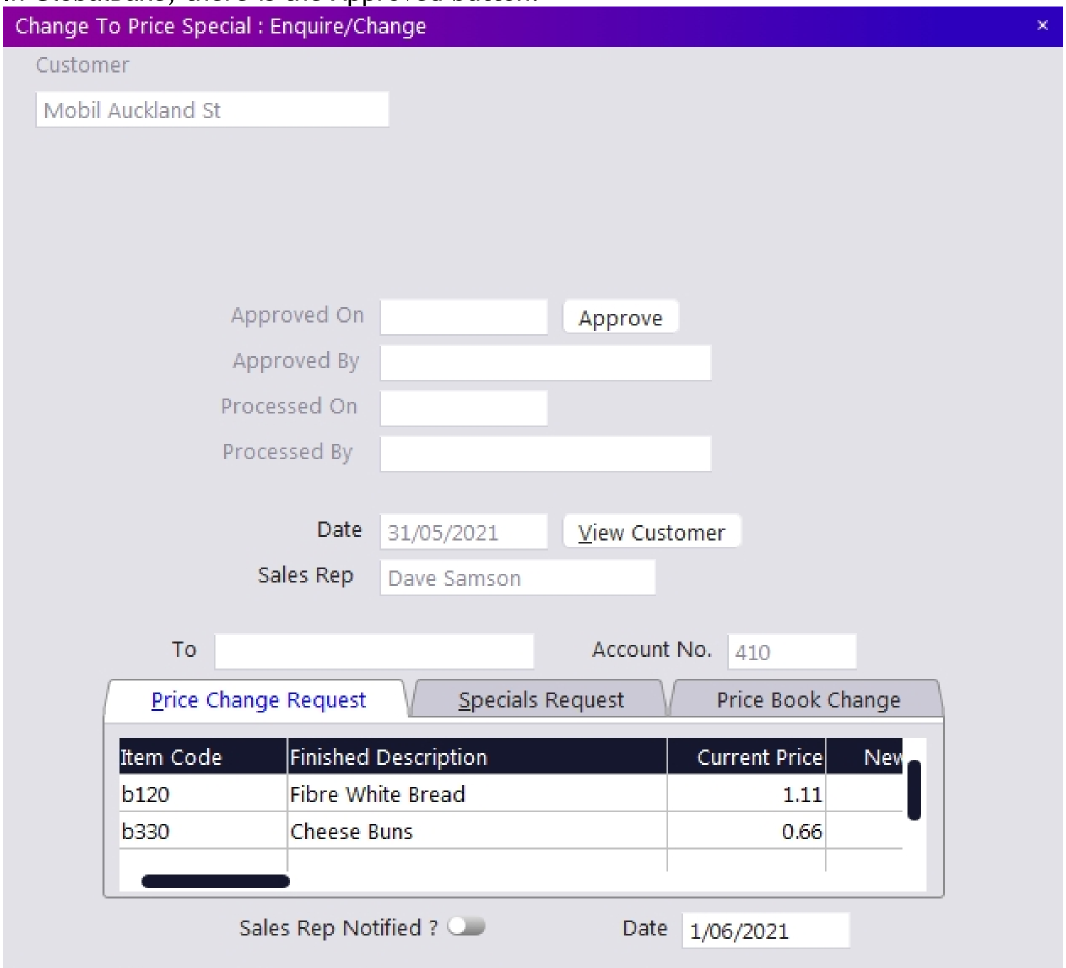
There are six options to create.

CHANGE TO PRICE SPECIAL

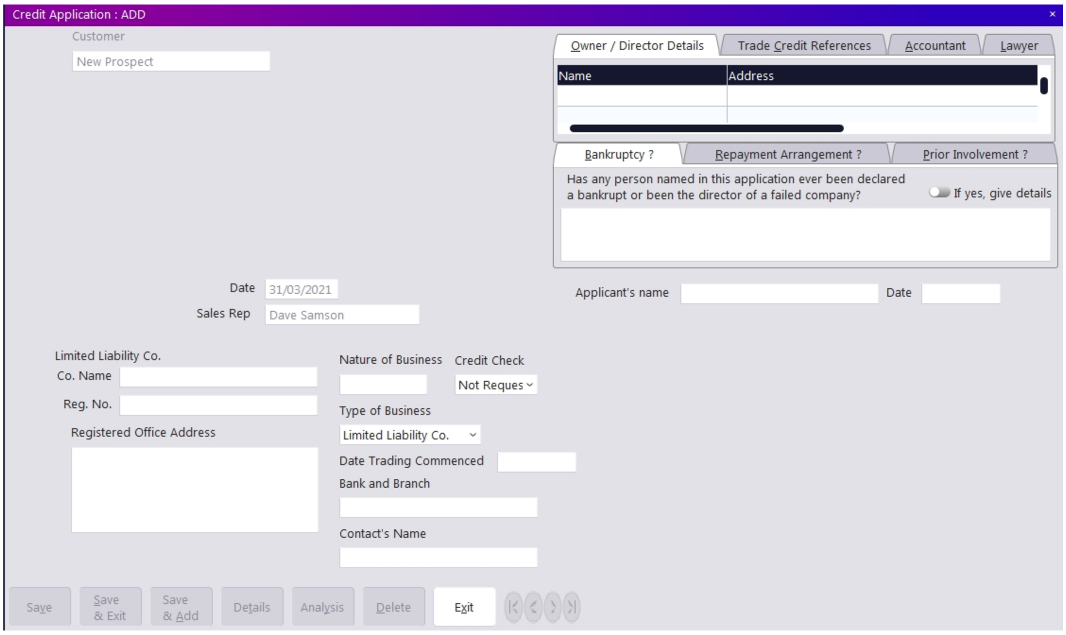


You can create new prices through a price change, either by dollar or percentage, a special price change with the further option of a date range or changing from one price book to another. You can create a new price book by clicking F8 in the price book field and clicking "Add".

In GlobalBake, there is the Approved button.

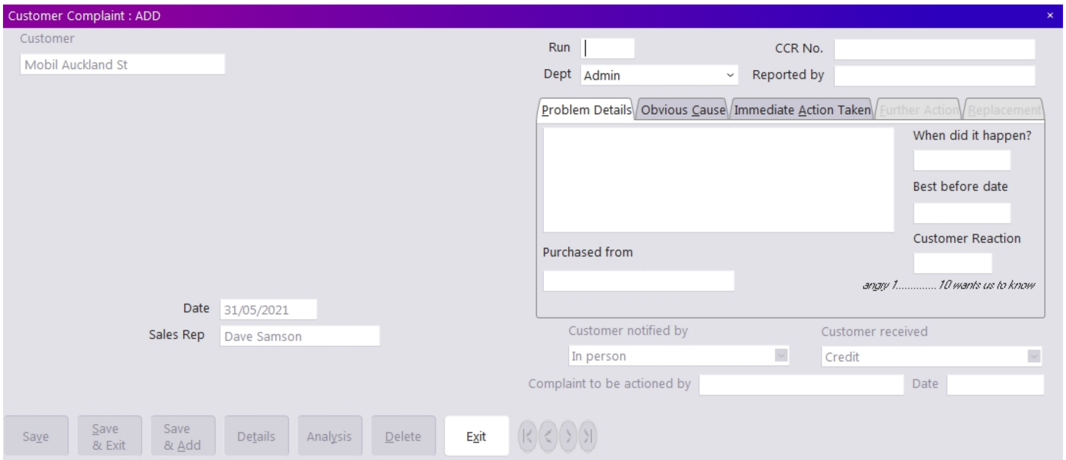


CREDIT APPLICATION



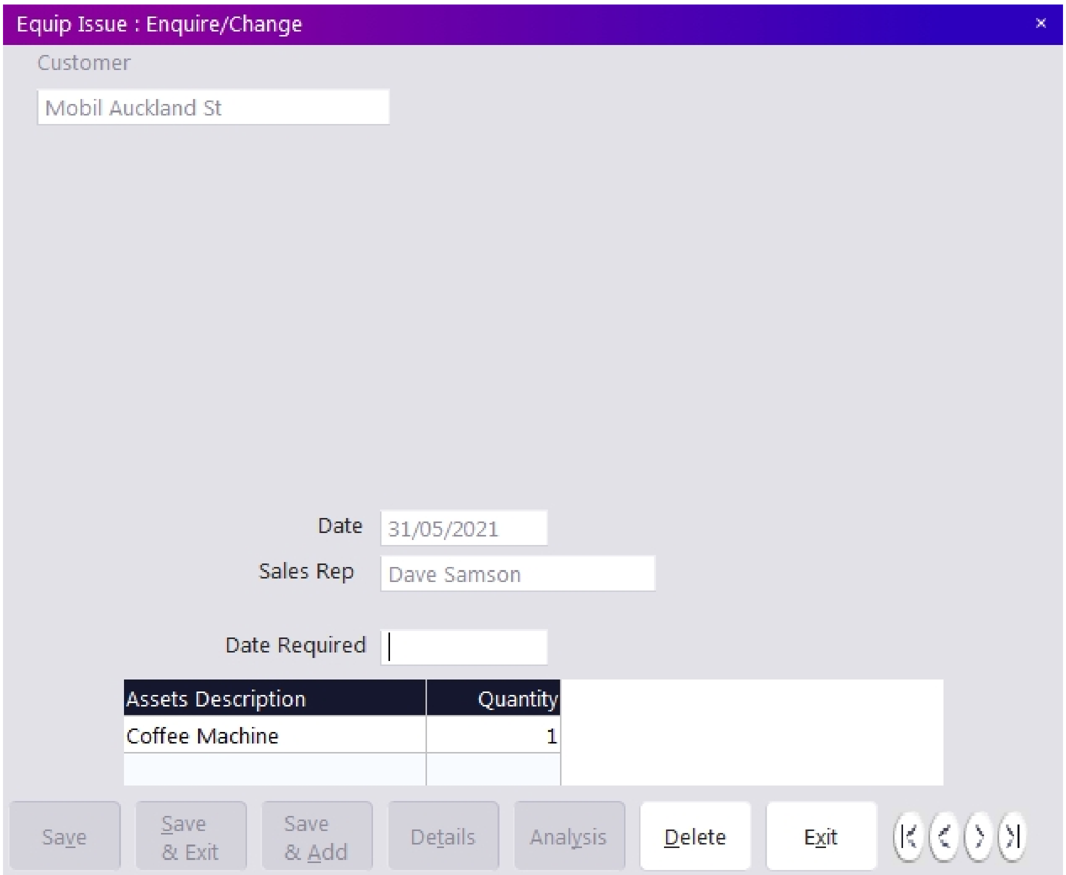
A credit application can only apply to a prospect. It allows you to gather information to see if the prospect is financially safe before making a decision.

CUSTOMER COMPLAINT



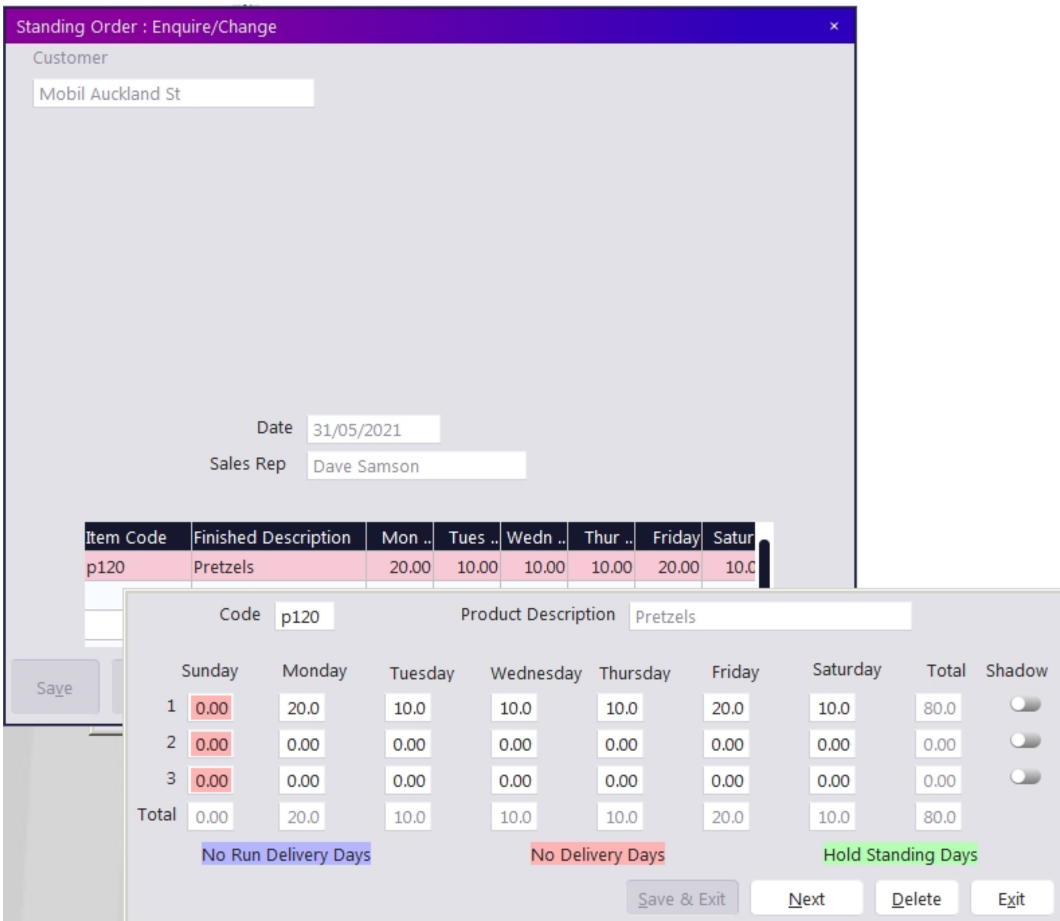
This allows the sales rep to enter a complaint and have head office informed. It shows great detail and lets you enter information about the follow up.

EQUIP ISSUE



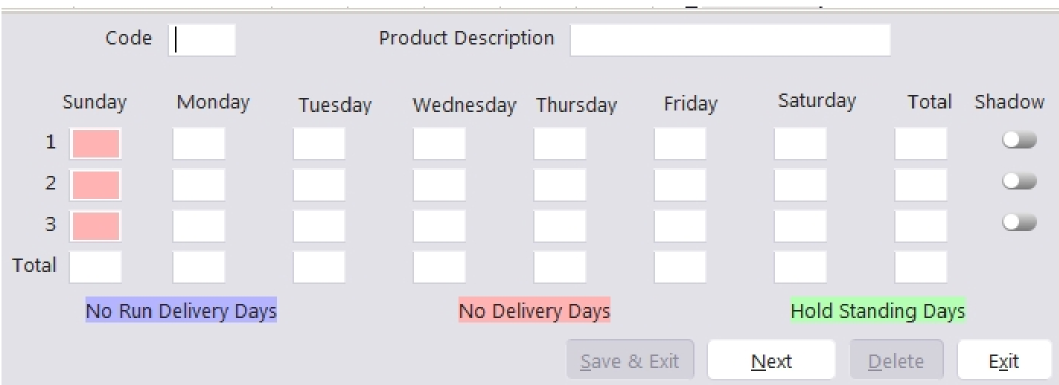
This allows the sales rep to request equipment for customers. These are customer assets and it allows tracking of assets.

STANDING ORDER

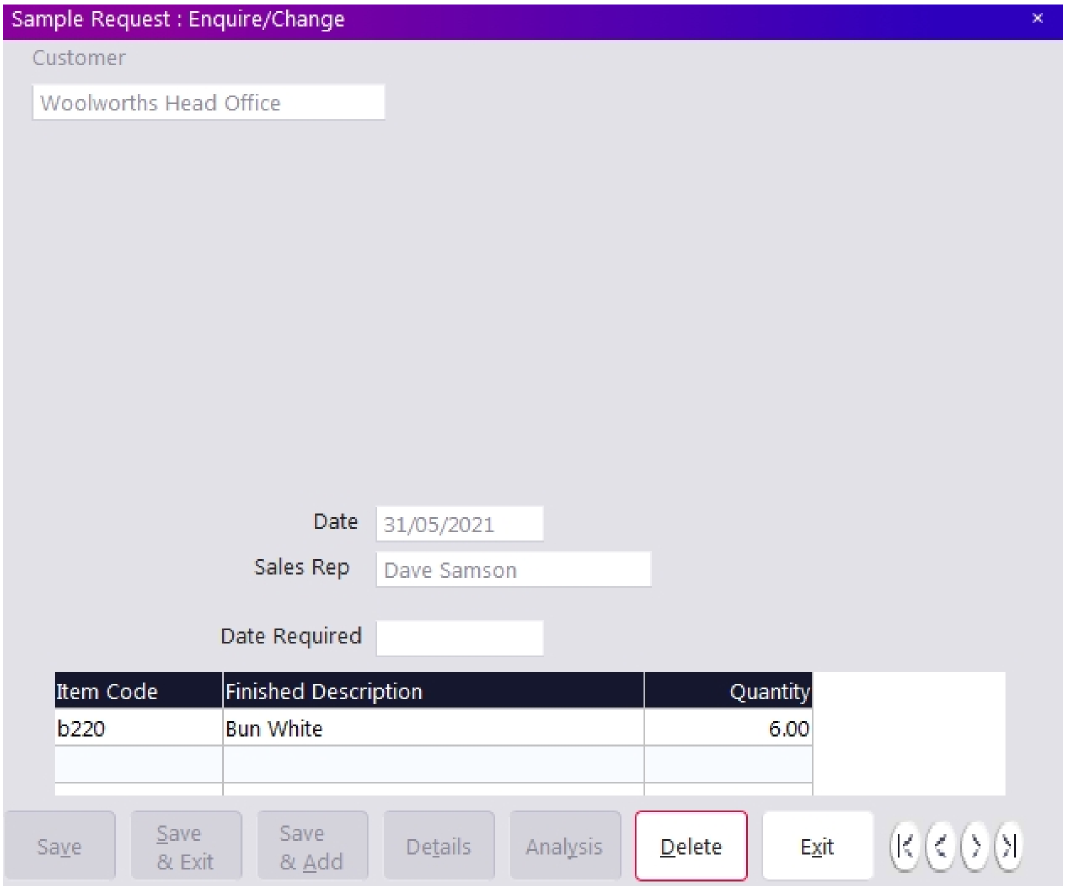


This is a request to change or add products to the customers standing order.

Click on the line to add the item code and quantity for each day.



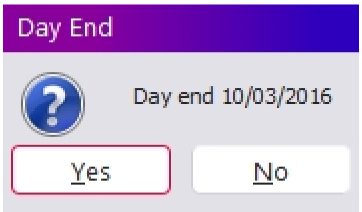
SAMPLE REQUEST



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.

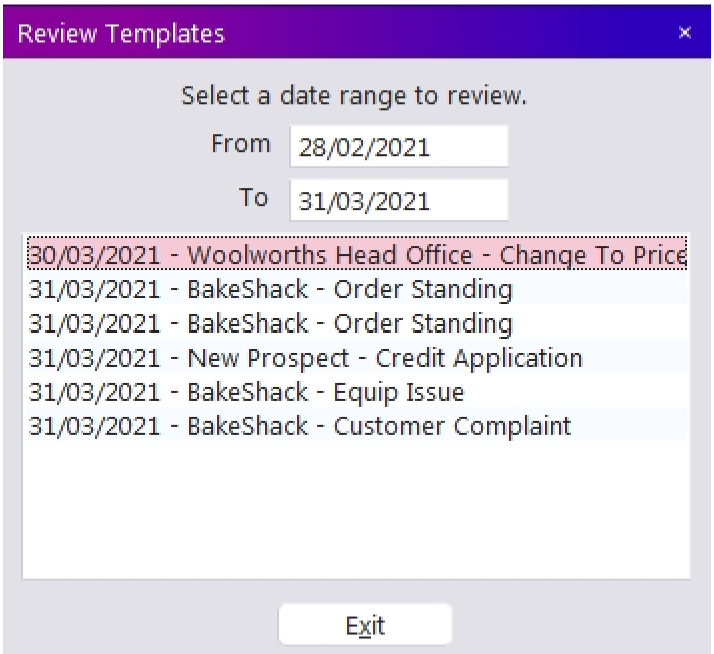


Ending a day will also send all messages.

REVIEW DAYS

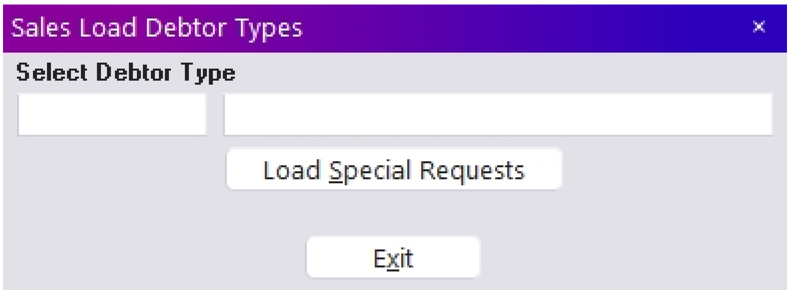
This option will show you a list of previous closed days and allow you to display them to see what happened. These can’t be changed as the days are closed.

REVIEW TEMPLATES

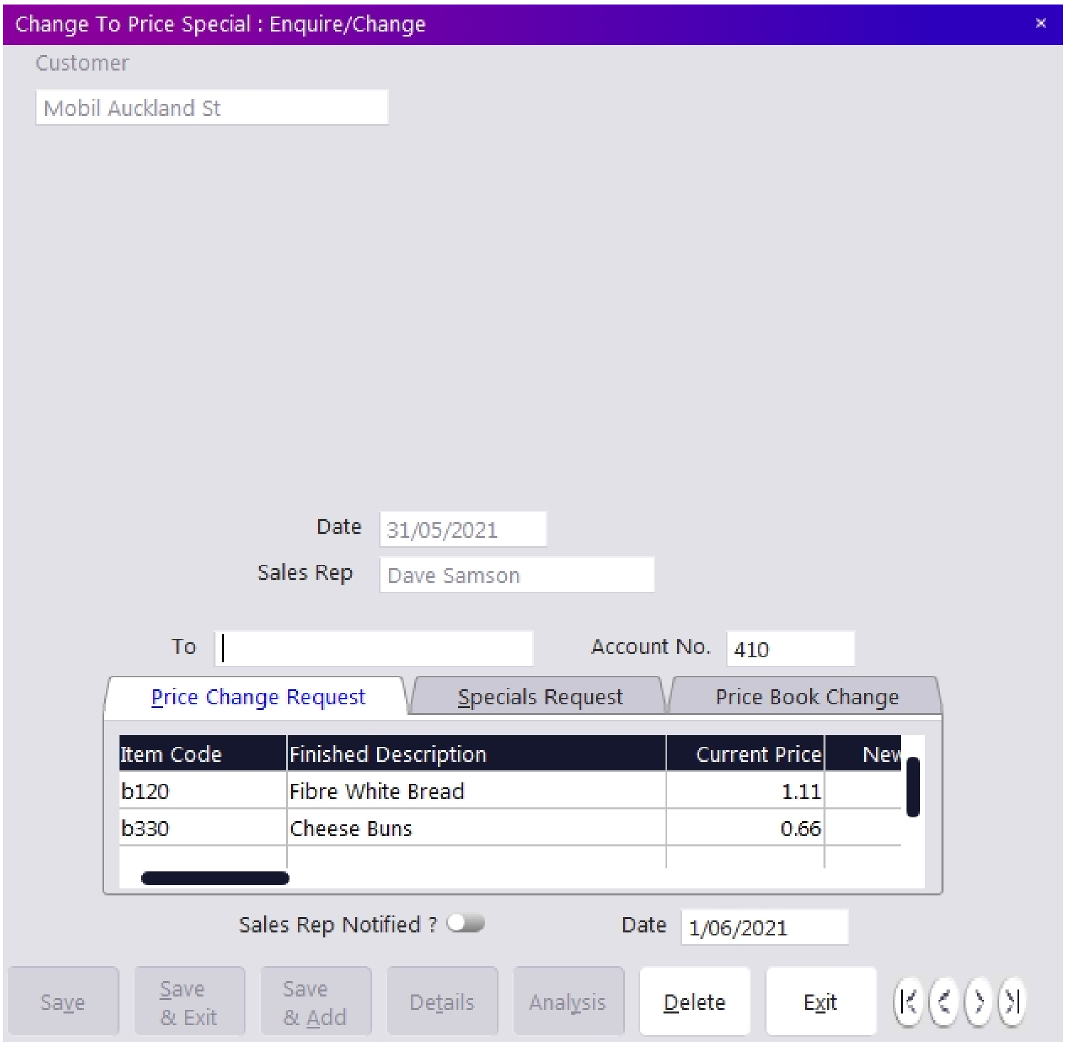


Daily > Review Templates
For a selected date range, you get a list of templates made. You can then click on a line and view it. If that day has been ended then you can’t modify it.

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

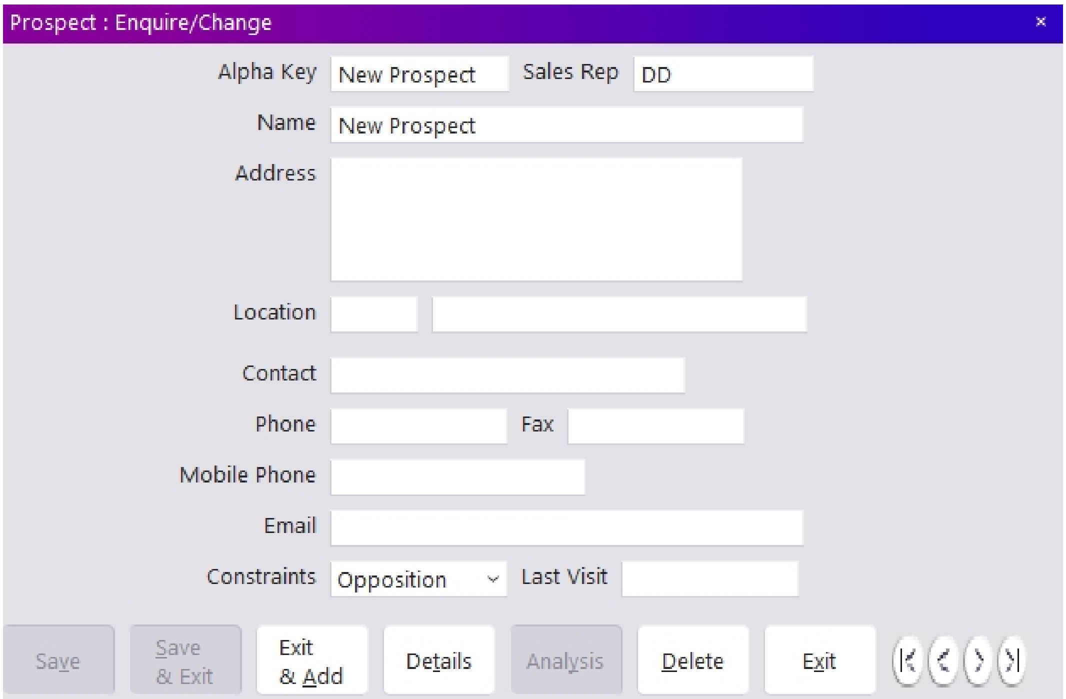
Constraint categories are categories on the prospect defining what you can identify as the reason they can't become customers. These can be added, edited and removed by the user.

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 and ended days can be displayed for review.

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).