

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.

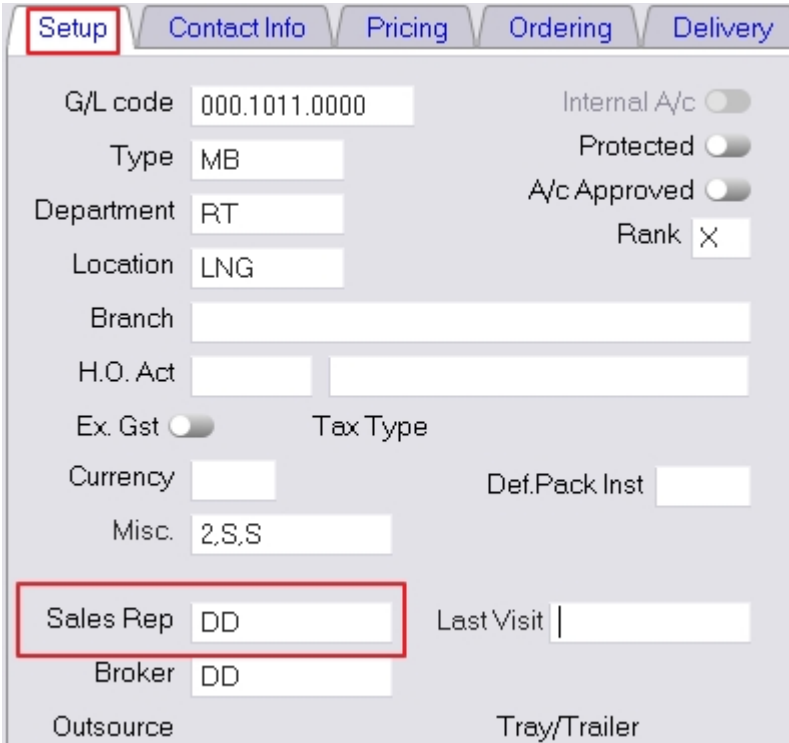
CONFIGURATION

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.

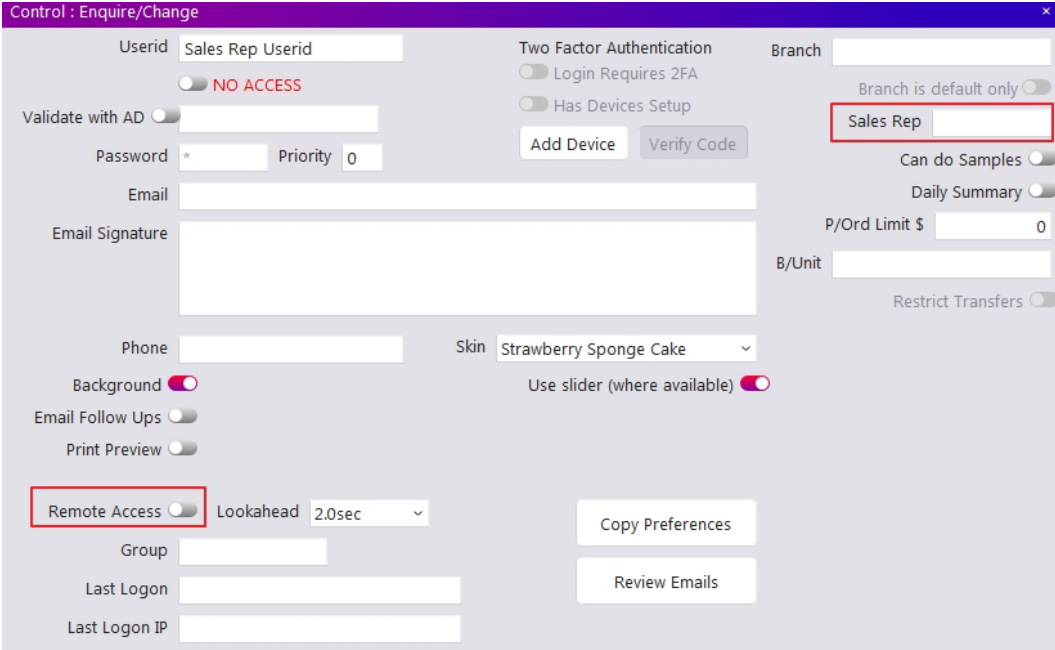
USERS

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.



Setup	Contact Info	Pricing	Ordering	Delivery
G/L code	000.1011.0000	Internal A/c	<input type="checkbox"/>	
Type	MB	Protected	<input type="checkbox"/>	
Department	RT	A/c Approved	<input type="checkbox"/>	
Location	LNG	Rank	X	
Branch				
H.O. Act				
Ex. Gst	<input type="checkbox"/>	Tax Type		
Currency		Def.Pack Inst		
Misc.	2,S,S			
Sales Rep	DD	Last Visit		
Broker	DD			
Outsource	Tray/Trailer			

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>

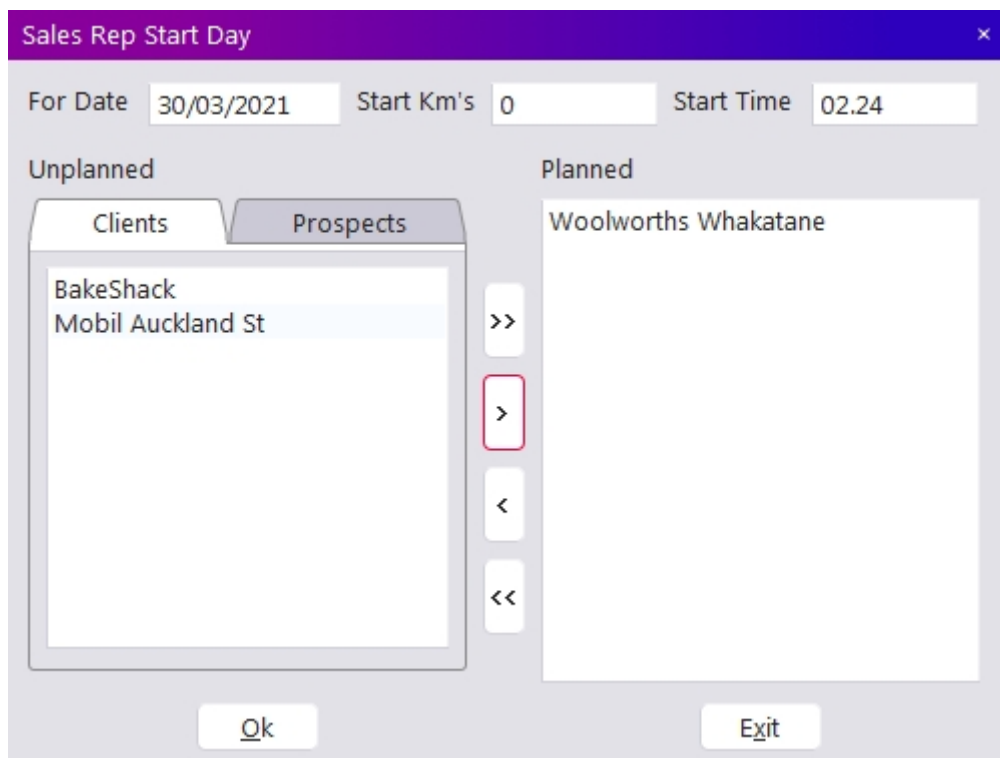
With these settings configured the user will be able to use the functions described below within the Sales application.

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.

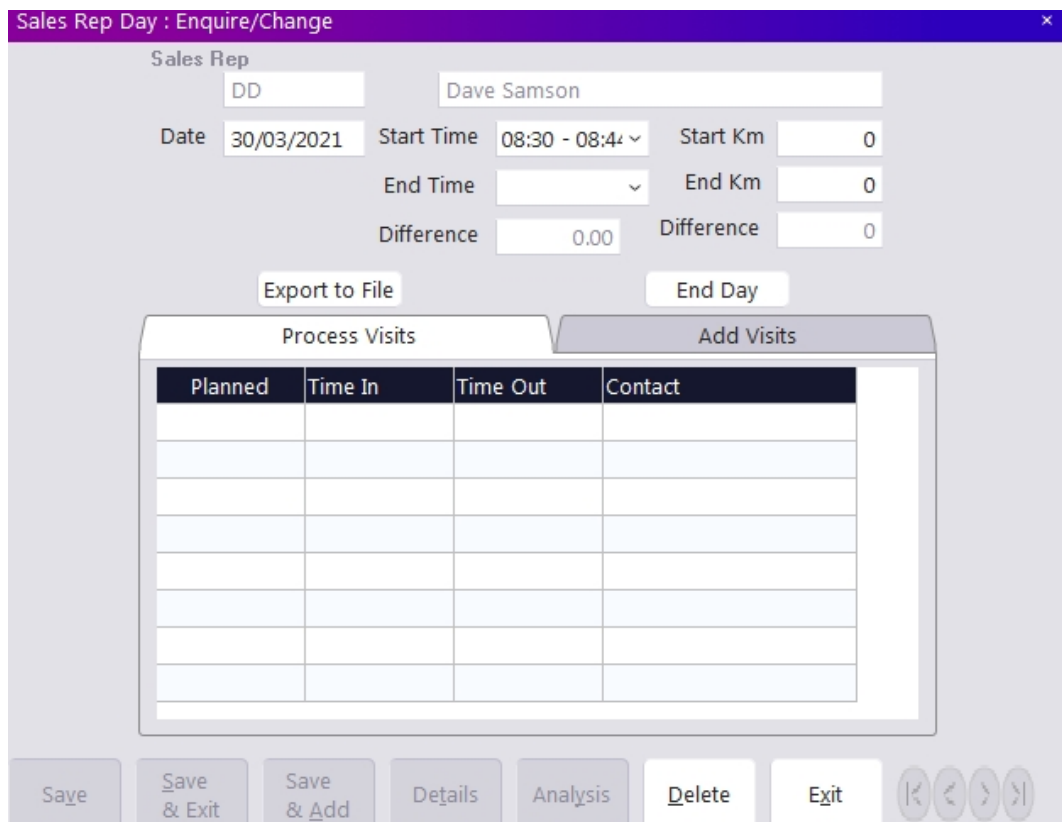
From main menu Daily > Start of Day



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.

Planned	Time In	Time Out	Contact
N	10:15 - 10:29	10:30 - 10:44	Woolworths Whakatane

Contact
 Woolworths Whakatane Planned

Visit Details
 Time In: 10:15 - 10:29
 Time Out: 10:30 - 10:44
 Visit Category: Other

Send to
 Admin My email Test
 Complaint Other
 Lynn Sales

Comment 1: Reviewed display and orders.

Buttons: Save & Exit, Next, Delete, Exit

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.

Sales Rep Day : Enquire/Change

Sales Rep: DD Dave Samson

Date: 30/03/2021 Start Time: 10:00 - 10:14 Start Km: 0
 End Time: 11:00 - 11:14 End Km: 0
 Difference: 1.00 Difference: 0

Export to File End Day

Process Visits Add Visits

Clients: BakeShack, Mobil Auckland St, Woolworths Whakatane

Prospects: New Prospect, Catz Cafe, Lisa Prospect

Add Visit
 New Prospect
 Add Fill In Time

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

Prospect : ADD

Alpha Key Sales Rep: DD

Name
 Address
 Location
 Contact
 Phone Fax
 Mobile Phone
 Email
 Constraints: Opposition Last Visit

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

Sales Rep Day : Enquire/Change

Sales Rep: DD Dave Samson

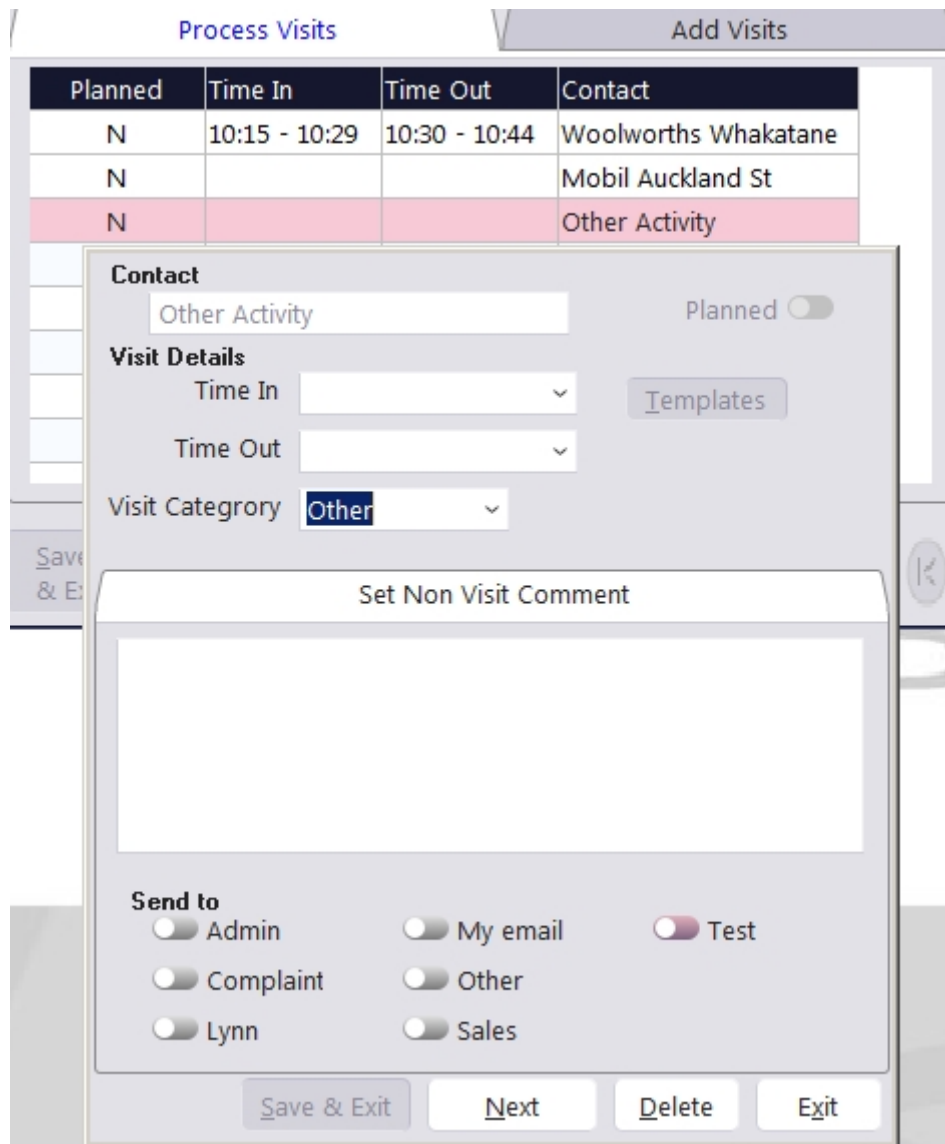
Date: 30/03/2021 Start Time: 10:00 - 10:14 Start Km: 0
 End Time: 11:00 - 11:14 End Km: 0
 Difference: 1.00 Difference: 0

Export to File End Day

Process Visits Add Visits

Planned	Time In	Time Out	Contact
N	10:15 - 10:29	10:30 - 10:44	Woolworths Whakatane
N			Mobil Auckland St
N			Other Activity

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.

Debtor Bake Type : Enquire/Change
✕

Debtor account No Name

Debtor Alpha Key **Prospect** Prospect alpha Key

Average Weekly Sales Dlr Estimated Weekly Sales Dlr

Average Weekly Sales Qty Estimated Weekly Sales Qty

Actual Ranking Estimated Ranking

Combined Ranking Bake Type

Opposition Estimates

Alpha Key	Bake Type	Est Weekly Dlr	Est Weekly Qty

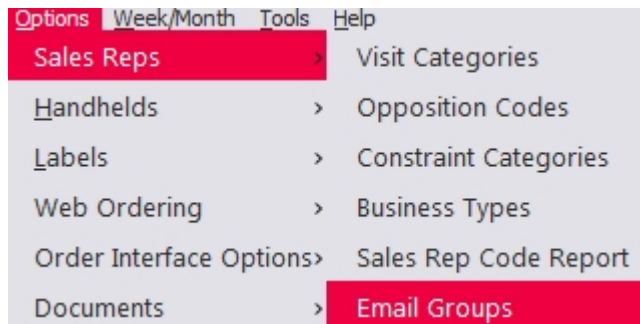
Save
Save & Exit
Save & Add
Details
Analysis
Delete
Exit
⏪ ⏩ ⏴ ⏵

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

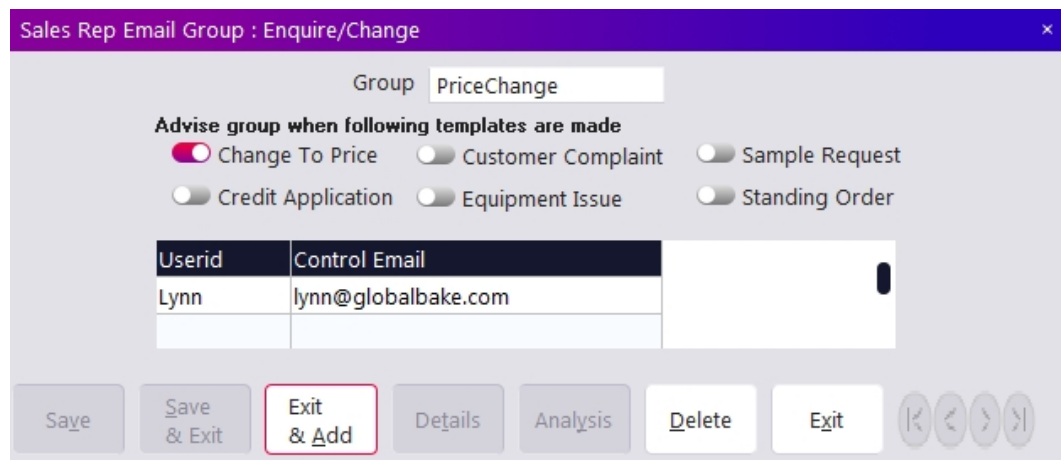
Templates are the requests, from each client, for a change. This screen allows you to add new email groups for comments, show you email comments sent and add or edit templates.

In GlobalBake Options > Sales Reps > Email Groups

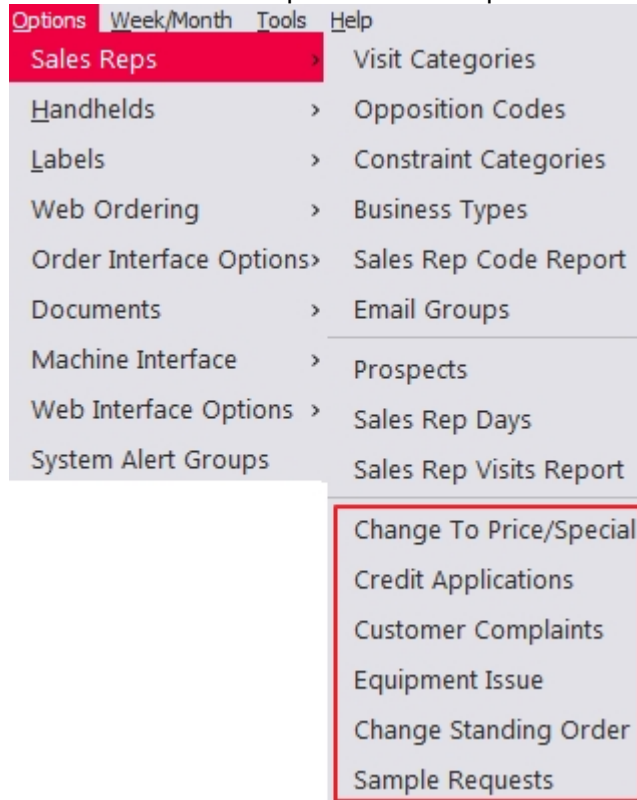


Use the Add button to add a new email group, or display and edit an existing group.

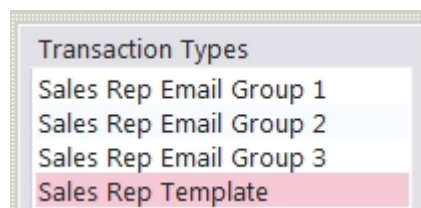
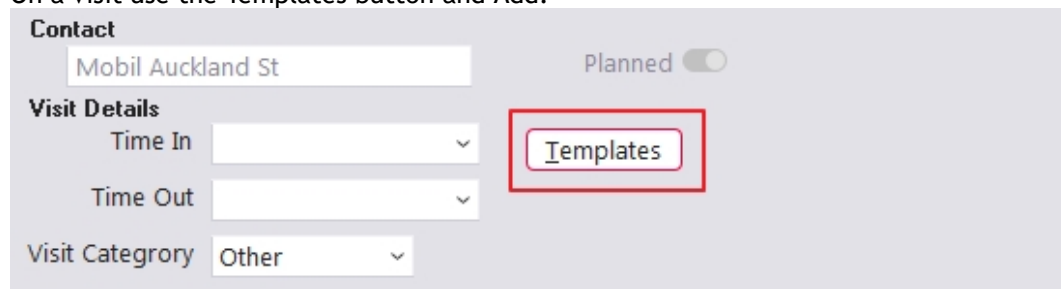
Select a name for the group. Select what templates they get notified for and add users by clicking on the lines below "Control Userid". This is their username in GlobalBake. Once saved, this group will appear as a tick box below the comment field on the visit form.



Template requests can be viewed from Options > Sales Reps



On a visit use the Templates button and Add.



Select Class for ADD Sales Rep Template

- Change To Price Special
- Credit Application
- Customer Complaint
- Equip Issue
- Standing Order
- Sample Request

OK

Cancel

There are six options to create.

CHANGE TO PRICE SPECIAL

Change To Price Special : ADD

Customer
Mobil Auckland St

Date 31/05/2021

Sales Rep Dave Samson

To Account No.

Price Change Request | **Specials Request** | Price Book Change

Item Code	Finished Description	Current Price	New

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".

In GlobalBake, there is the Approved button.

Change To Price Special : Enquire/Change

Customer
Mobil Auckland St

Approved On

Approved By

Processed On

Processed By

Date 31/05/2021

Sales Rep Dave Samson

To Account No. 410

Price Change Request | Specials Request | Price Book Change

Item Code	Finished Description	Current Price	New
b120	Fibre White Bread	1.11	
b330	Cheese Buns	0.66	

Sales Rep Notified ? Date 1/06/2021

CREDIT APPLICATION

Credit Application : ADD

Customer
New Prospect

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

Date 31/03/2021
Sales Rep Dave Samson

Applicant's name Date

Limited Liability Co. Co. Name Nature of Business Credit Check Not Reques

Reg. No. Type of Business Limited Liability Co.

Registered Office Address Date Trading Commenced

Bank and Branch

Contact's Name

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

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

Assets Description	Quantity
Coffee Machine	1

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

STANDING ORDER

Standing Order : Enquire/Change

Customer: Mobil Auckland St

Date: 31/05/2021
Sales Rep: Dave Samson

Item Code	Finished Description	Mon ..	Tues ..	Wedn ..	Thur ..	Friday	Satur
p120	Pretzels	20.00	10.00	10.00	10.00	20.00	10.00

Code: p120 Product Description: Pretzels

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Total	Shadow
1	0.00	20.0	10.0	10.0	10.0	20.0	10.0	80.0	<input type="checkbox"/>
2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	<input type="checkbox"/>
3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	<input type="checkbox"/>
Total	0.00	20.0	10.0	10.0	10.0	20.0	10.0	80.0	

No Run Delivery Days No Delivery Days Hold Standing Days

Buttons: Save & Exit, Next, Delete, Exit

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.

Code: | Product Description:

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Total	Shadow
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Total	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

No Run Delivery Days No Delivery Days Hold Standing Days

Buttons: Save & Exit, Next, Delete, Exit

SAMPLE REQUEST

Sample Request : Enquire/Change

Customer
Woolworths Head Office

Date 31/05/2021
Sales Rep Dave Samson
Date Required

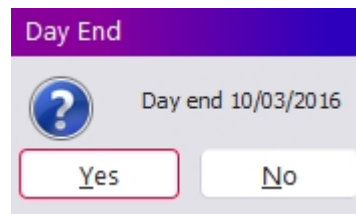
Item Code	Finished Description	Quantity
b220	Bun White	6.00

Save Save & Exit Save & Add Details Analysis Delete Exit

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.

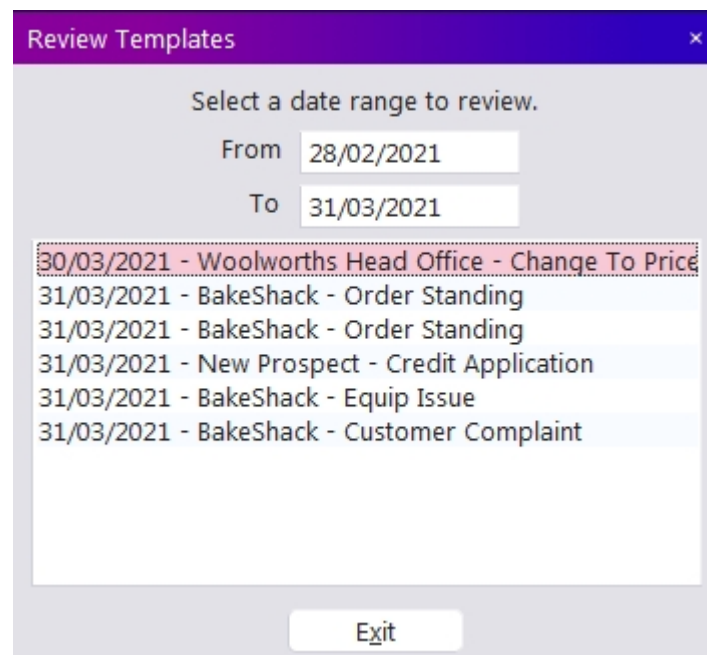


Ending a day will also send all messages.

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.

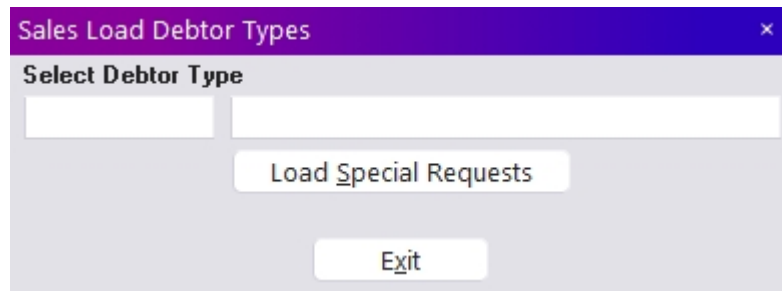
REVIEW TEMPLATES



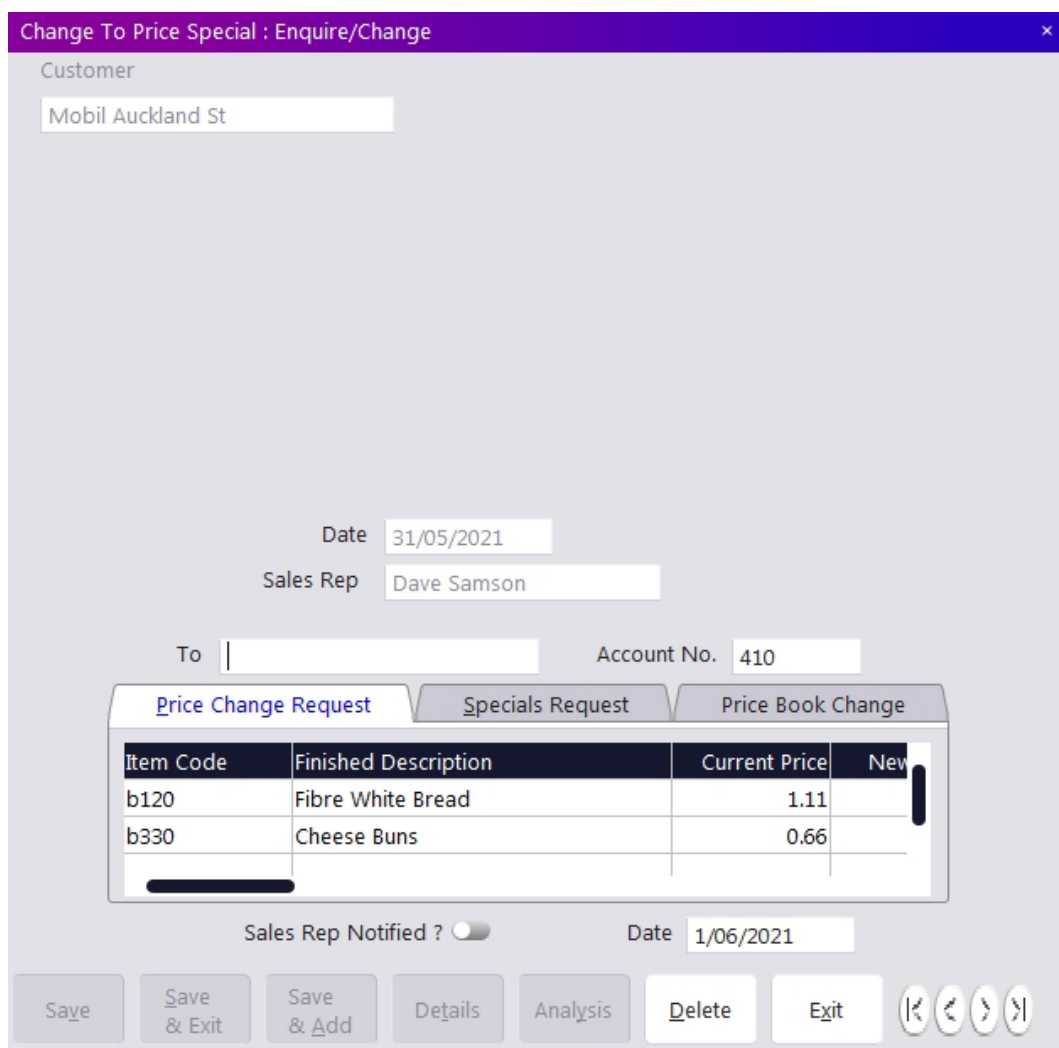
Daily > Review Templates

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

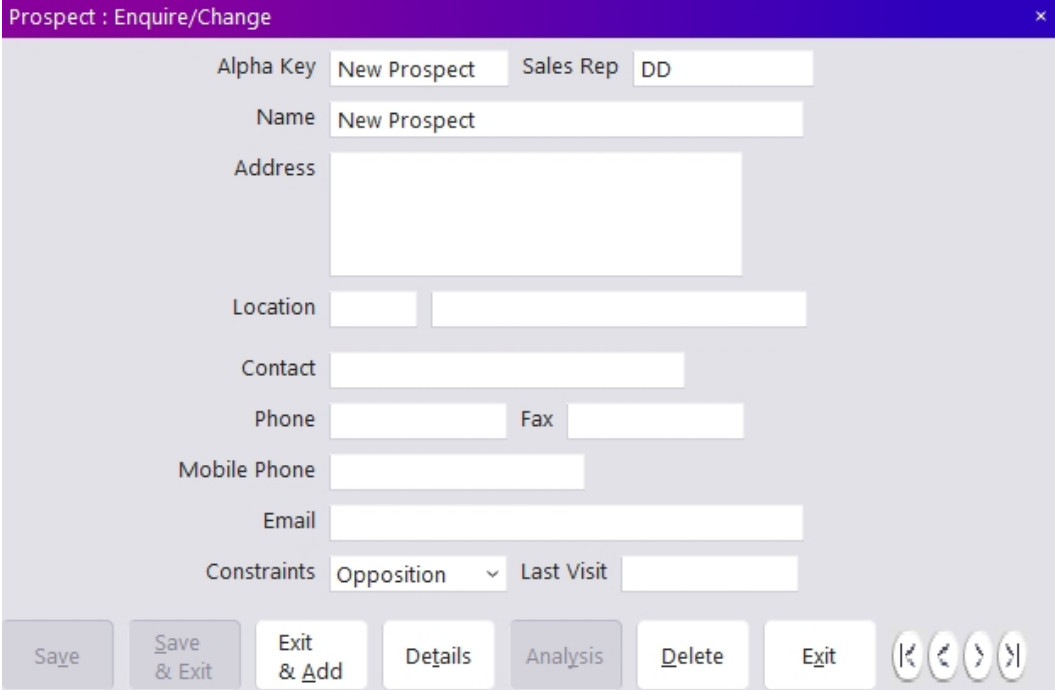
Constraint categories are categories on the prospect defining what you can identify as the reason they can't become customers. These can be added, edited and removed by the user.

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).