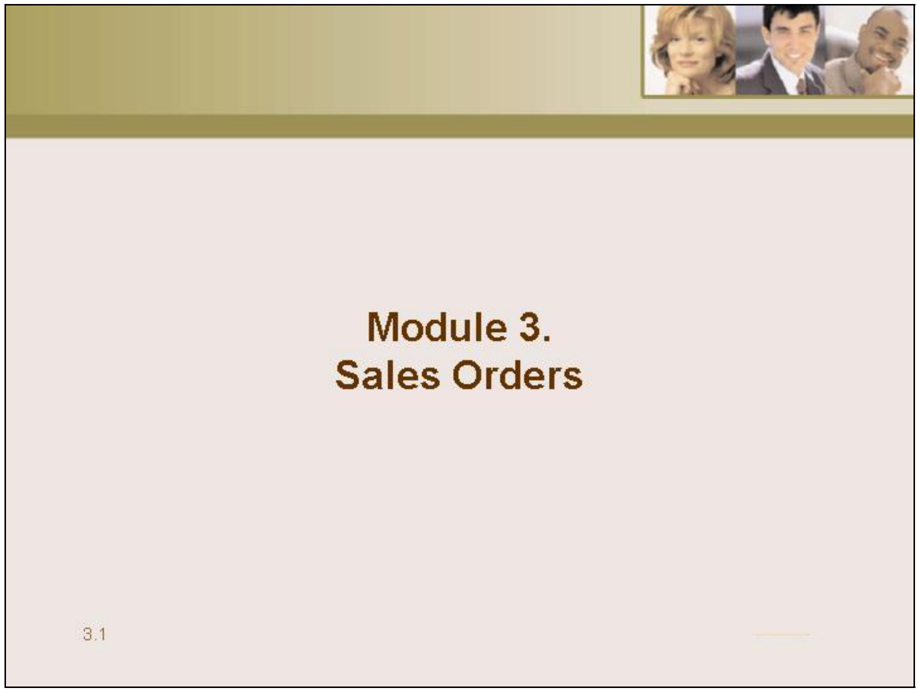
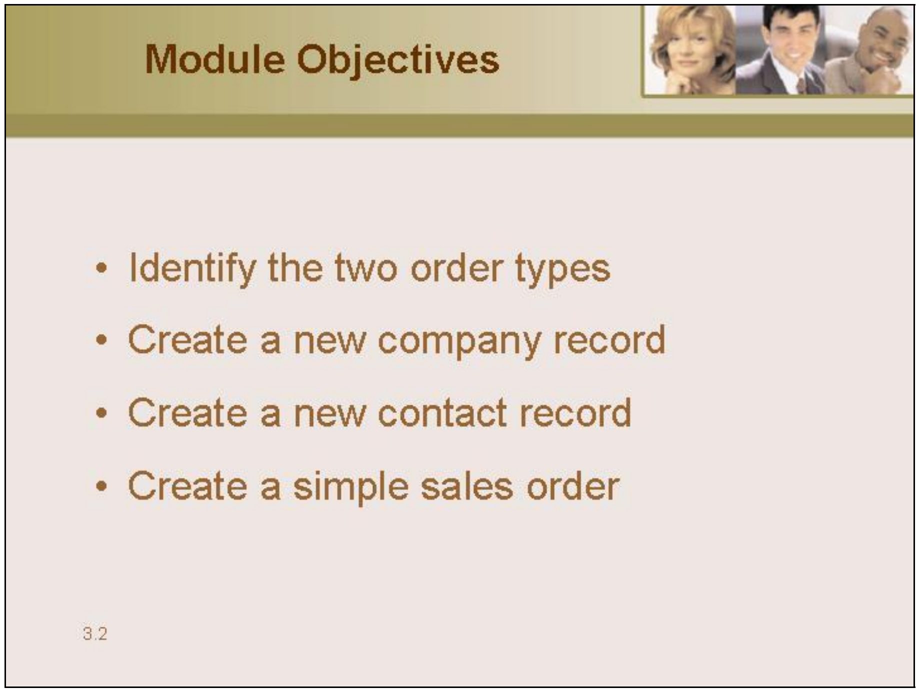
Slide 3.1



Instructor Note

This topic introduces participants to the different types of sales orders and explains how to create a simple sales order.

Slide 3.2



Instructor Note

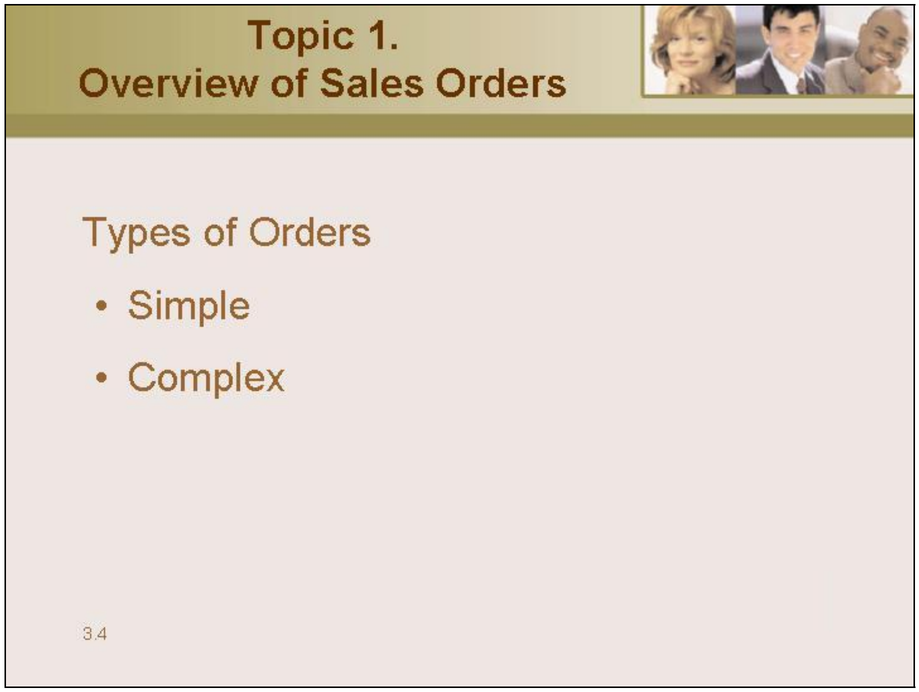
Briefly review the course objectives.

Slide 3.3

Instructor Note

Briefly describe each topic.

Slide 3.4



Instructor Note

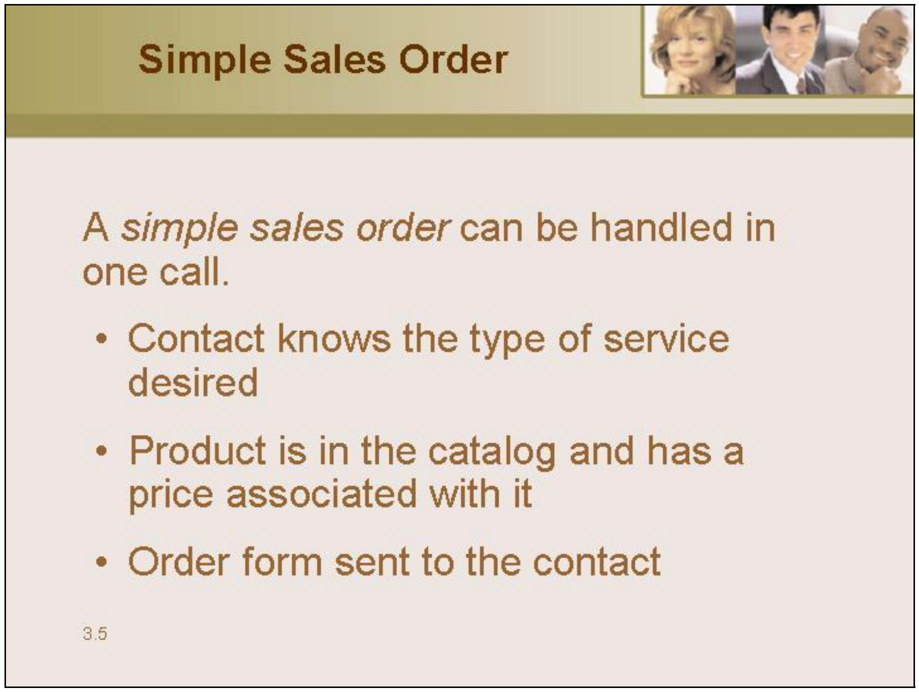
This first topic provides a high-level look at sales orders.

There are two types of sales orders:

- Simple sales order
- Complex sales order

The next two slides describe each sales order type.

Slide 3.5



Instructor Note

This slide lists the characteristics of a “simple” sales order.

Explain that a simple sales order is one that can be handled in one call because:

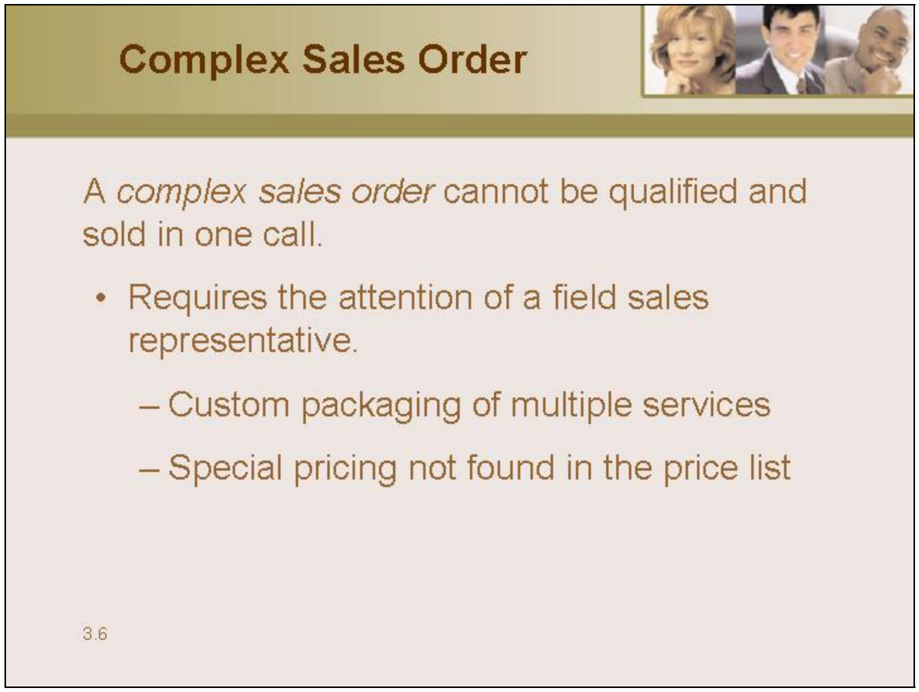
- The customer (caller) knows what product they want, **or**
- You can determine the product easily by asking a few questions about the customer’s needs

Another characteristic of a “simple” sales order is that the product or service the caller requires is one that can be found in the catalog and has a standard price associated with it.

These characteristics mean that you can prepare an order, on the spot, to send to the caller. The caller will return the signed order, along with any required prepayments.

When the signed order form is received, the order can be submitted for processing.

Slide 3.6



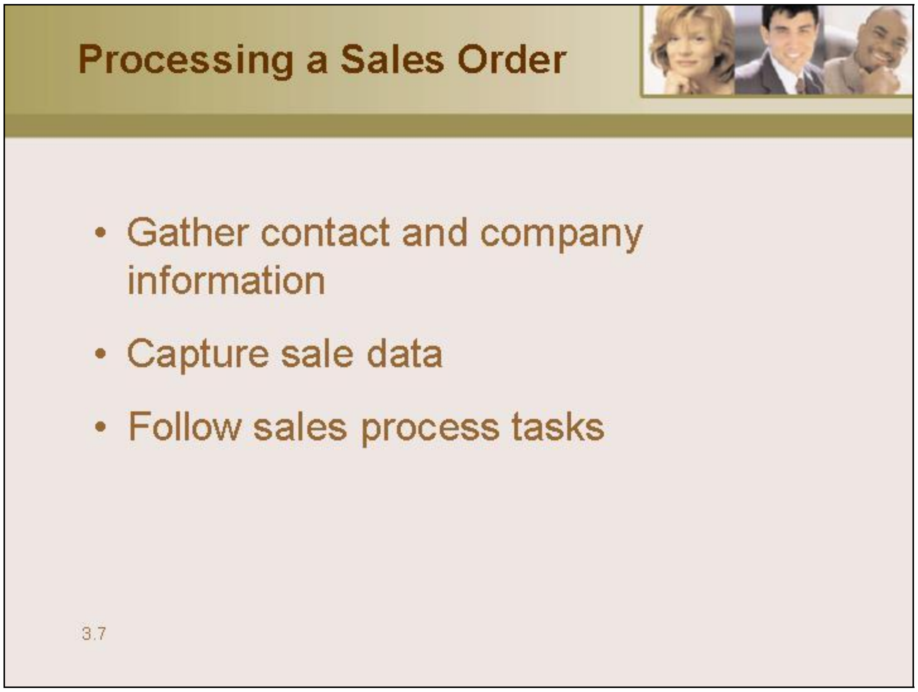
Instructor Note

The “complex” order is one that cannot be handled in a single call. The caller requires the expertise of a field sales representative to determine exactly which products or services will satisfy their company’s needs.

Examples of situations in which a complex order is appropriate:

- A caller needs a custom-packaged solution.
- The product or service requires special pricing that does not appear in the catalog price list.

Slide 3.7



Instructor Note

Explain that both order types—simple and complex—are processed in a similar manner.

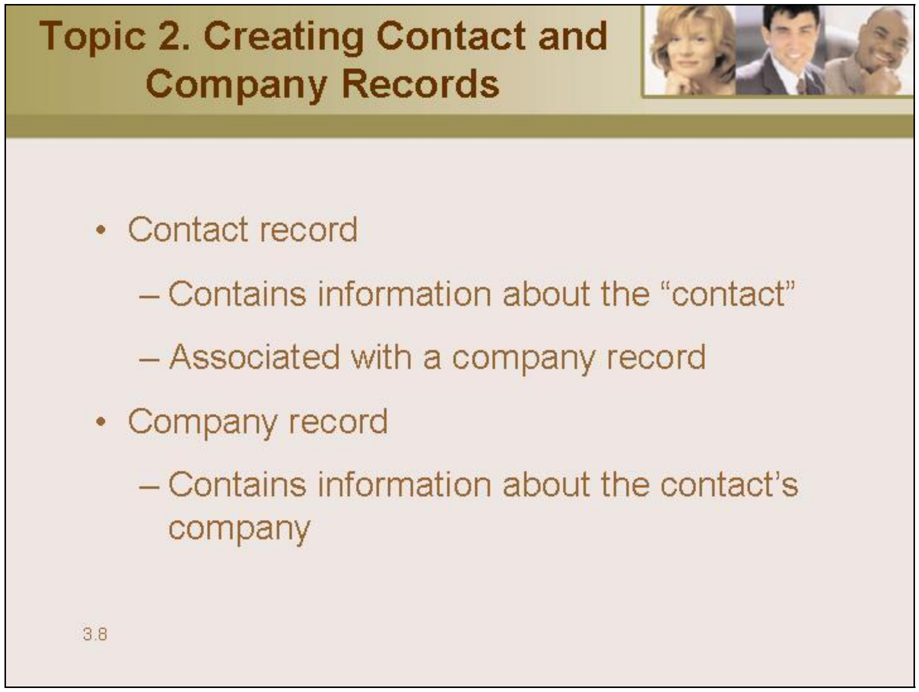
- Both sales types require that you gather and record contact and company information—such as name, addresses, and telephone numbers.
- Collecting information about the sale is particularly important because it allows management to track sales activity, including the revenue being generated and the products that are being sold.

The CRM system uses a predefined sales methodology to create orders. After the customer has decided which products or services they want, the system identifies the steps required to create the order.

Explain that there are a few more steps involved for a complex order than for a simple order.

Remind participants that they will create both a simple sales order and a complex sales order later in the course.

Slide 3.8



Instructor Note

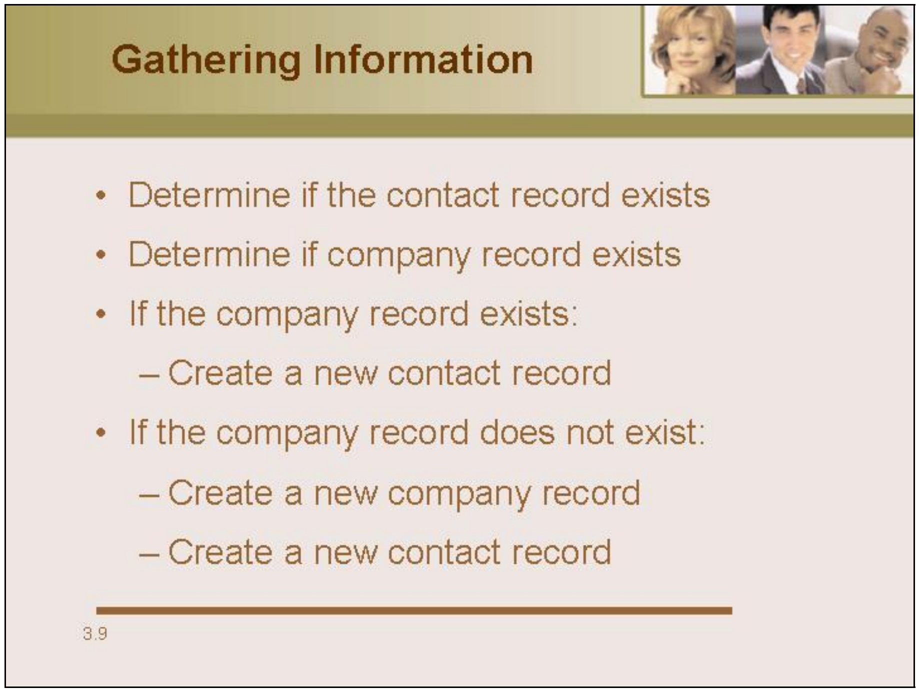
After summarizing the similarities and differences between the two sales types, you are ready to talk about creating contact and company records.

Use this slide to explain the definition of "contact" and "company."

- The "contact" is the caller—the person actually talking to the representative. Always record that person as a contact to allow whatever follow-up is appropriate.
- There can be more than one contact for each company.

In the system, the company and contact records are linked to each other.

Slide 3.9



Instructor Note

Describe the procedure that participants should follow when they receive a call.

Important: Mention that the training system database is populated with contact and company information. When participants start using the CRM system on the job, there will be no company or contact information already in the system.

Demonstration. Creating a Contact and Company Record

Instructor Note Create contact and company records for **Samuel Adams** of **Peppermint Supermarkets LTD**.

Step 1. Select **File → Open → Contact**.

The **Contact** search page displays.

Step 2. Search for **Samuel Adams**.

(No record will be found.)

Step 3. Click **New**.

The **New Contact** page displays with the contact's name.

Mention that the contact's name carries over from the search.

Step 4. Type **Peppermint Supermarkets LTD** in the **Company** field.

The Company search page displays; the company is not in the database.

Step 5. Click **New**.

The New Company page displays with the company's name.

Step 6. Type the following:

- **44 01304 305779** – Phone No.
- **CT16 IEB** – Postal code
- **205 Chimney Sweep Lane, Dover, UK** – Address

The street address is a two-line entry consisting of the number and name.

Explain that the system can accommodate several types of addresses. In this demonstration, the company's main address is also the "Bill to" address.

Step 7. Click **Save**.

Explain that you have entered only the information required to create a record. For a real customer, additional information might be included.

Step 8. Click the **Address** tab to open the Address page.

Briefly discuss the different types of addresses that can be recorded for this company.

Step 9. Open the other pages in turn and review the contents. Return to the **Information** page.

Step 10. Click **Save and Close**.

The **Contact** page displays.

Step 11. Draw participants' attention to the information that has carried over from the company record.

Step 12. Click **Save**.

The **Contact** page remains open.

Exercise. Creating a Contact Record

Scenario

You receive a call from Mr. John Smith from the International Industrial Press, LTD. Mr. Smith is new to the company. He is responsible for working with service providers.

Use the following information to create a company record and a contact record for this caller.

Company information:

International Industrial Press, LTD
124 Swindon Lane
Northhampton, UK
NN1 32F (postal code)
044 028 9054 5511 (area and local number)

Contact information:

John Smith
127C Swindon Lane
Northhampton, UK
NN1 32F (postal code)
044 028 9054 5635 (area and local number)

Refer to *Creating a Company Record* and *Creating a Contact Record in* the Desk Reference.