

9 Sales: from the potentials to the invoice

- [9 Sales: from the potentials to invoice](#)
- [9.1 Potentials](#)
- [9.2 Quotes](#)
- [9.3 Sales orders](#)
- [9.3.1 Recurring billing from Sales Order](#)
- [9.4 Budget](#)
- [9.5 Invoices](#)
- [9.6 Delivery Notes](#)

9 Sales: from the potentials to invoice

The main modules and processes involved in the pre-sales, sales and after-sales phases are:

- Leads
- Potentials
- Quotes
- Sales and Purchase Orders
- Invoices
- HelpDesk and FAQs

What are normally defined as marketing lists (from websites, word-of-mouth, fairs or various suppliers) are managed with the Leads module. As explained in the first part of this manual, the sales person who manages the lead will convert it into a customer (company and/or contact) only after the expression of real interest.

With this method, it is possible to keep a clear distinction between activities for potential customers and those for customers that have already acquired or are under negotiation. All commercial activities proper are therefore carried out on Accounts and/or Contacts. You will find many connection possibilities from the company/contact reports menu as all CRM revolves around the customer.

Let us now look at the business and administrative processes in detail: Potential, Quote, Sales Order, Invoice.

9.1 Potentials

A potential is established if there is a real interest in your products/services from both potential and current customers, opening up a negotiation process. If it is not created automatically through conversion (see the section on Leads), you can subsequently add the potential to the Company to which it is addressed, through the relations menu.

The potential is the container of the negotiation and all the information, documents and communication between you and the customer strictly related to the individual negotiation.

In addition, the tool has commercial forecast and report objectives that should not be overlooked (e.g. the Budget tool available for this purpose). The option of customising the registry by modifying the fields through Layout Editor also applies to Potentials, as for all the vtenext modules.

The screenshot shows the 'Creating Potential' form. The 'Potential Information' section contains the following fields: Potential Name, Potential No (AUTO GEN ON SAVE), Amount (€), Expected Close Date (03-06-2022), Lead Source, Assigned To (User: Matteo Giarolo), Campaign Source, Sales Stage, Next Step, Effective closing date, and Probability (%). The 'Description Information' section has a Description field. The form also includes 'Save' and 'Cancel' buttons at the top right.

Potential Name	Name of the potential
Amount (€)	Useful for anyone wishing to make predictions about the value of open potentials, even though the initial value may be indicative. It is self-calculated at the time of linking with a quote if product lines have been organised Warning: by default, the Amount field is updated only if the related quote is in "Created" or "Delivered" status
Account name	Link to the customer company present in the CRM
Expected Close Date	Expected date of conclusion of the deal

Type	Allows for cataloguing between existing and new business
Next Step	The next step in the negotiation
Lead Source	Reports the origin of the lead, in the event that the potential arises from a lead conversion
Sales Stage	Important to know the state of progress of the negotiation
Assigned to	By default, assigned to the user who creates it. Identifies the salesperson who manages the negotiation
Probability (%)	Probability of success of the negotiation which, multiplied by the amount, makes it possible to obtain a plausible forecast of the value of the single potential
Campaign Source	If the source is an ongoing or completed campaign, you can link it

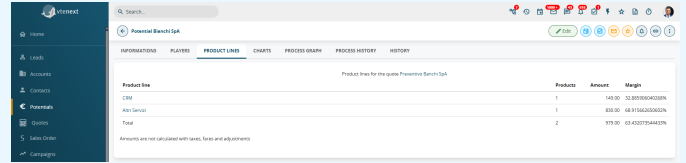
Potentials can also be exported and imported via .csv (see relevant chapter).

Within the Opportunity, there are also three important **TABS** that should be taken into consideration, as they provide a broader range of information:

<p>Players</p>	<p>Players are the Contacts and Companies involved in the specific Opportunity.</p> <p>The Contacts can be:</p> <ul style="list-style-type: none"> - Contacts from the Main Company: that is, individuals directly linked to the commercial project and thus to the company we are targeting. - Other Contacts: individuals who may not be part of the main company but are still involved in the commercial project (e.g. external technicians). <p>The Companies can be:</p> <ul style="list-style-type: none"> - Partners: companies collaborating with the main company, where the <i>Type</i> field has been set to "Partner". - Competitors: companies that are competitors of the main company, where the <i>Type</i> field has been set to "Competitor"
-----------------------	--

Product Lines

Product Lines are used to define an annual **Budget** that each specific line must achieve. Thanks to a custom report in the Opportunities module, it is possible to monitor the **Budget Delta** that still needs to be reached. See also the dedicated chapter (**Chapter 8.2 - Product Lines**)

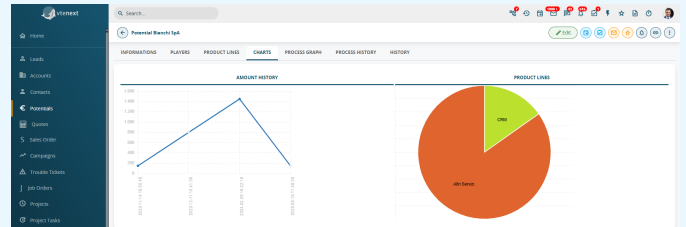


Product Line	Product	Amount	Margin
CRM	1	145.00	32.807500000000%
HRM/CRM	1	835.00	32.817500000000%
Total	2	979.00	32.822500000000%

Amounts are not calculated with taxes, fees and adj. amounts.

Charts

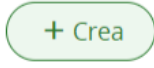
Charts allow you to visualize the historical trend of all the amounts related to that specific opportunity. Each time a quote is created and/or revised, the *Amount* field in the opportunity is updated accordingly. This operation feeds the chart and makes the trend readable through a bar graph. To the right of this chart, there is also a **pie chart** showing the distribution of product lines, which helps in understanding the percentage contribution of each individual line to the total



9.2 Quotes

You can create a new quote through the reports and Add Quote menu from the potential, company or contact registry.

NB.: a quote cannot be created starting from a lead.

Alternatively, you can create a new quote from the Quotes module using  , entering the links to the customer manually.

Subject	It is recommended that the name of the company and/or the project be mentioned to facilitate searches
Potential name	Link field of the quote to the relevant business potential
Quote Stage	Important for knowing the state of progress of the negotiation. The statuses can be freely set by the system administrator
Valid Till	Expiry date of the offer
Contact Name	Connection with the contact person (equivalent to "for the attention of")
Inventory Manager	The choice of an inventory manager does not involve automatism, it is a field of view only
Account Name	Connection with the client company to which the quote refers
Assigned to	The CRM user who is managing the quote, by default the person creating it

Creating Quote

Quote Information

Quote No: AUTO GEN ON SAVE

Quote Stage: --Please select--

Valid Till: [Calendar Icon]

Carrier: FedEx

Potential Name: Search...

Totale Provvigione: (€)

Subject: Shipping

Contact Name: Search...

Account Name: Search...

Assigned To: User

Address Information

Billing address ↔ Shipping address

Billing Address: [Redacted]

Shipping Address: [Redacted]

Shipping PO Box: [Redacted]

Shipping City: [Redacted]

Shipping State: [Redacted]

Shipping Postal Code: [Redacted]

Shipping Country: [Redacted]

Inventory Manager: mariobianchi12345@gmail.com (Mario Bianchi)

Billing PO Box: [Redacted]

Billing City: [Redacted]

Billing State: [Redacted]

Billing Postal Code: [Redacted]

Billing Country: [Redacted]

Terms & Conditions

Terms & Conditions

Tempo di consegna, sviluppi od altri servizi da concordare con il ns. referente.
 I prezzi indicati sono Intesi al netto dell'IVA (22%)
 Pagamento: 50% alla conferma d'ordine con fattura a rimessa diretta, il rimanente 50% a 60gg d.f.f.m.
 Per conferma del preventivo, inviare offerta controfirmata tramite email.

Description Information

Description: [Redacted]

Item Details


Currency: Euro (€) Tax Mode: Individual

Tools	* Item Name	Qty In Stock	Qty	List Price	Provvigioni	Total	Price colonna test	colonna formula
Search...		0.00	1.00	0.00	0.00	0.00	data	test formula
Description							(ds-mm-yyyy)	0
Comments								
							0.00	
							Total	0.00
							(-) Discount	0.00
							(+) Shipping & Handling Charges	0.00
							(-) Taxes For Shipping and Handling	0.00
							Adjustment Add	0.00
							Grand Total	0.00

VTBENT 22.05

© 2008-2022 vtbenet.com | License

The second part of the data sheet shows the product/service lines. You can enter your product by filling in the appropriate section.

Discount	You can discount per product line and/or in total, expressed as a percentage of the list price or a precise figure. In the case of %, it is possible to indicate several discounts in sequence by separating the percentages with 
Tax	vtenext calculates taxes based on the information set out in the product data sheet. It is possible to change the tax without changing the product catalogue entry. You can display one tax per line or in total
Margin	Calculated automatically: it's the ratio between profit (list price - product cost) and list price
Shipping charges	You can add additional shipping and handling fees
Tax on shipping charges	You can add additional taxes on shipping and handling fees
Adjustment	Rounding the final value upwards or downwards

Once you have saved the quote, you can create or send the relevant PDF using the functions provided by the PDF Maker module panel in the Other menu, at the top right.

For more information on the PDF Maker module and printing, please refer to the relevant chapter.

You can use the reports menu to specifically link communication with your customer (Messages), appointments (Activities), the scan of the quote with changes that the customer asks you to make (Documents), and so on, to the quote.

9.3 Sales orders

The potential can be considered as obtained when the order confirmation arrives. The order, however, may change from the initial proposed quote. vtenext gives you the option of keeping track of these differences. By default, the Generate Sales Order button from the Other menu of the quote sheet allows you to create the order by transferring the contents of the quote and making any changes.

Subject	We recommend including the reference to the company and/or potential to facilitate any future search of the order
Potential Name	Link between the order and relevant potential
Customer Number	If you use customer number codes, you can enter the one relating to the order here
Quote Name	Link to the quote that originated the order
Purchase Order	If the customer sends you a reference to their purchase order, you can enter it here
Contact Name	Connection with the customer contact (person you deal with)
Due Date	Order due date
Carrier	You can indicate the carrier that will make the delivery

Status	Important for knowing the state of progress of the order. The statuses can be freely set by the system administrator
Excise Duty	Special taxes or other costs
Account Name	Connection with the customer company to whom the order refers
Sales Commission	Any commissions
Assigned to	The CRM user who is managing the order, by default the person creating it
PBlockRO	For the Sales Orders module (this field is available only in this module), the " PBlockRO " field is available. It can be activated via a process and then managed through conditional fields so that, if checked, it will hide the product block when editing the Sales Order itself.

9.3.1 Recurring billing from Sales Order

It is possible to activate the automatic generation of invoices from the sales order through the options in the Recurring Billing Information block.

Recurring Invoice Information □

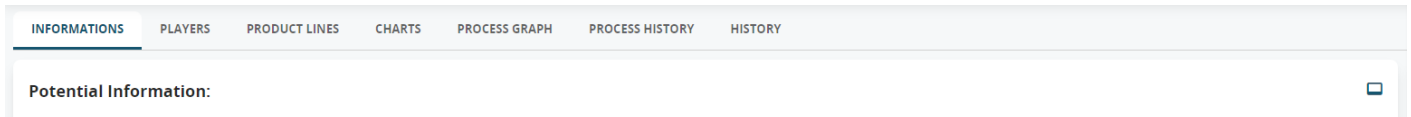
Enable Recurring no	Frequency
Start Period	End Period
Payment Duration	Invoice Status

Enable Recurring	Tick to enable automatic invoice generation from the sales order, after creating the first invoice
Frequency	Daily, weekly, monthly
Start Period	When the recurring billing will start
End Date	When the recurring billing will end
Payment Duration	Indicate duration
Invoice Status	The status that auto-generated invoices will assume by default

Warning! For recurring billing it is necessary to enable the CRON of the server on which vtenext is installed! See the relevant paragraph: CRONJOB – Processes to plan.

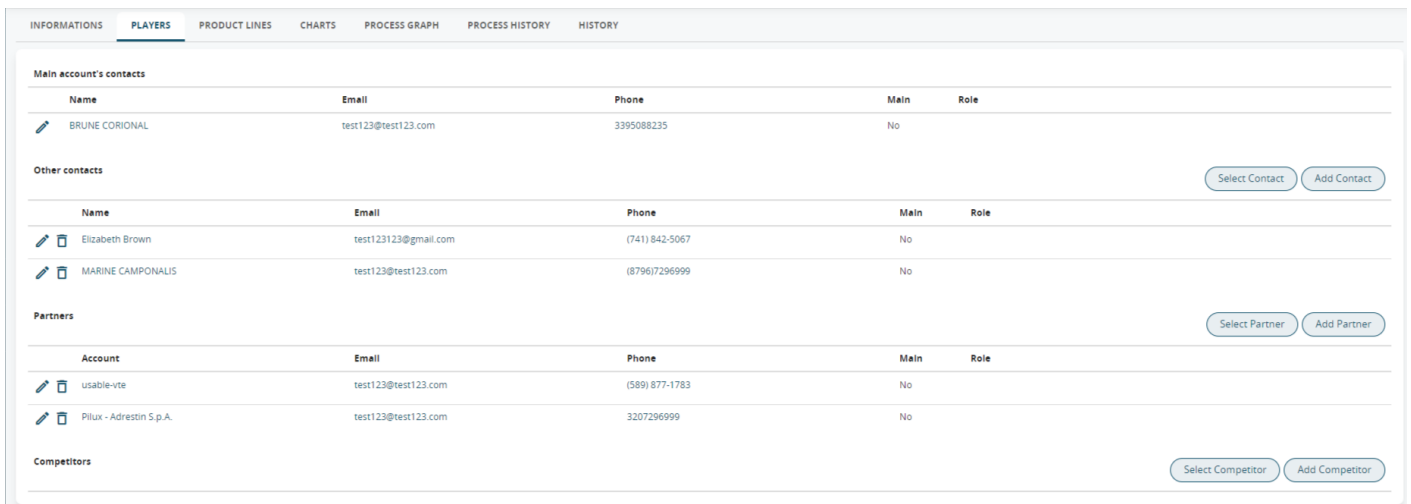
9.4 Budget

The Potentials module shows information relating to their progress in relation to other linked items. The Budget module is navigable through the tabs shown in the figure:



The Information tab directly relates to the potential, while other data sheets relate to the Budget.

- **Players:** if inserted, they are data related to contacts, partners and competitors, useful for the negotiation phase. They can be added as new or selected if already present in CRM, and can be profiled according to their role in the negotiation
- **Other contacts:** if inserted, they are the contacts (also of different companies) linked to the potential
- **Partners:** if inserted, they are the companies that have a partnership relationship with the sales potential company
- **Competitors:** if entered, they represent one or more competitors (Companies with field Type = Competitor) linked to the sales potential. Also in this case, they can be selected from the CRM database or added as new



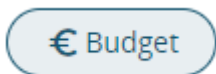
Product lines: information on amounts and profit margins organised by product lines. The products are those included in the related sales order or quote, grouped as set out in the Product Lines module. The amount is the sum of the economic values of all the products present in the potential belonging to a given line. The margin is calculated, again per line, based on the difference between the sales price of the product and its cost. The margin is expressed as a percentage and is calculated by making a weighted average of the products present in the line. The formula used to calculate the margin is: $[\text{SUM}(\text{prices}) - \text{SUM}(\text{costs})] / \text{SUM}(\text{prices})$. The cost of each product must be defined in the relevant data sheet via the Unit cost field.

Product line	Products	Amount	Margin
Test Product line	2	30.00	50%
Total	2	30.00	50%

Amounts are not calculated with taxes, fares and adjustments

Charts: show the historical amounts of the different deals made through the sales potential. vtenext also provides general budget management features based on the information contained in Potentials, Products, Product Lines, Quotes (**for quotes, only those in the "Created" or "Delivered" status are considered**). Some values in these modules will feed the Budget by Product Line report contained in the Budget folder in the Reports module.

You can access them directly by clicking on the "Budget" button in the Potentials menu.



This report allows you to have an immediate view of your business situation, organised by period of time.

You can navigate the data by year, half-year, quarter or month. The following data are presented:

- **Budget:** information established in the Yearly Budget field contained within the sections of the Product Lines module
- **Best:** sum of the amounts of potentials that have at least 70% probability of closure
- **Forecast:** sum of the amounts of potentials that have at least 80% probability of closure
- **Worst:** sum of the amounts of potentials that have at least 90% probability of closure
- **Closed orders:** sum of the amount of closed sales orders
- **Budget Delta:** the difference between the budget established in the relative product line and the amount of sales orders, always relative to the same product line. In essence, it expresses what remains to be done to achieve the planned budget.

By default, the report presents information organised by product line. It is, however, also possible to organise it by user assignee of the potential.

Summing up briefly

The Best, Forecast, Worst columns are then counted based on the% chance of closing the opportunity. To be counted in the "Best" column, the opportunity must have a probability of at least 70% closing, to be counted in the "Forecast" column, at least 80% and to appear in the "Worst" column, it must be at least 90%.

9.5 Invoices

The billing module is useful for managing the administrative part in vtenext (amounts to be paid, closed invoices, outstanding invoices) and keeping all the customer history in one platform.

The module can be used independently from the Quotes module. Companies often prepare very accurate quotes with long product descriptions, while invoices are almost always summary descriptions indicating amounts and payment methods.

The Create Invoice button from the sales order or quote master (Other menu) will open with the invoice already attached, proposing the same content.

Search...

Invoice Invoice

INFORMATIONS PROCESS GRAPH PROCESS HISTORY HISTORY

Invoice Information

Subject	Sales Order
Invoice	
Customer No	Invoice No
	INV10
Contact Name	Invoice Date
	25-02-2022
Due Date	Purchase Order
25-02-2022	
Excise Duty	Sales Commission
0.000	0.000
Account Name	Status
De BRUNE CORIONAL s.n.c.	AutoCreated
Assigned To	Time created
qnecklqelozjhxwhg@pptrvv.com (Capitan America)	25-02-2022 10:33:29
Modified Time	Creator
25-02-2022 10:33:29	qnecklqelozjhxwhg@pptrvv.com (Capitan America)

Address Information

Billing Address	Shipping Address
Billing address	shipping address
Billing PO Box	Shipping PO Box
Billing City	Shipping City
Billing State	Shipping State
Billing Postal Code	Shipping Postal Code
Billing Country	Shipping Country

Terms & Conditions

Terms & Conditions

Description Information

Description

Item Details

Currency: Euro (€) Tax Mode: individual


* Item Name	Qty In Stock	Qty	List Price	Total	Price
Product a	-1.00	1.00	10.00	10.00	
			(-) Discount :	0.00	
			Total After Discount :	10.00	
			(+) Tax :	0.00	
			Margin :	50%	
			Total	10.00	
			(-) Discount	0.00	
			(-) Shipping & Handling Charges	0.00	
			(-) Taxes For Shipping and Handling	0.00	
			Adjustment	0.00	
			Grand Total	10.00	

Talks

Start a new talk

Notes - Slider

+ CREATE



- SHORTCUTS
- Item Details
 - Talks
 - Notes
- RELATIONS
- Activities
 - Documents
 - Delivery Notes
 - Assets
 - Messages
 - Processes

Subject	Invoice name
----------------	--------------

Sales order	Link field to the original sales order
Customer Number	If the customer has an internal code
Invoice date	Each invoice must have a date
Payment due date	Due date for payment of this invoice
Purchase Order	Reference to the customer's purchase order, if any
Manufacturing tax	Information on manufacturing taxes
Sales Commissions	Any sales commission
Account Name	Link to the customer company
Status	Important for knowing the state of progress of the invoice. The statuses can be freely set by the system administrator
Assigned to	User who manages the invoice, by default the person creating it

The invoice can be exported to PDF according to the available templates: see PDF Maker chapter.

9.6 Delivery Notes

The Delivery Notes module is used to manage transport documents and is the last step in the sales-administration cycle.

Creating Delivery Note

Delivery Note Information

Subject: Delivery note
Delivery Note No: AUTO GEN ON SAVE
Delivery Note Date: 25-02-2022
Customer No: [Empty]
Carriage: --None--
Account: demovte

Delivery Note No: AUTO GEN ON SAVE
Sales Order: [Search...]
Reason: --None--
Term of Delivery: --None--
Assigned To: User (qneclkgelozhwhg@pptrw.com (Capitan America))

Terms & Conditions

Terms & Conditions: mail.

Description Information

Description: [Empty]

Item Details

Currency: Euro (€) | Tax Mode: Individual

Tools	Item Name	Qty In Stock	Qty	List Price	Total	Price
[Search...]	[Empty]	0.00	1.00	0.00	0.00	
[Description]	[Empty]			(-) Discount :	0.00	
[Comments]	[Empty]			Total After Discount :	0.00	
				(-) Tax :	0.00	
				Margin :		0.00

Buttons: Add Product, Add Service

Total	0.00
(-) Discount	0.00
(+) Shipping & Handling Charges	0.00
(+) Taxes For Shipping and Handling	0.00
Adjustment: Add	0.00
Grand Total	0.00

Enter the main fields and the products related to the shipment. It is possible to create a Delivery Note starting from a sales order through Create Delivery Note (Other menu); in this case all the data of the sales order will be reported in the Delivery Notes. For PDF printing of the Delivery Note, see the chapter dedicated to the PDF Maker module.