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2.01.15 Sales Funnel

The **Sales Funnel** mask manages the possible orders in the system. Here, classifications can be made and the need for action, the sales phase, the order probability, the presumed order value and the total budget can be entered.

The mask consists of the following elements:

General Data

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Dokument Bearbeiten Ansicht Aktionen

Stamblatt Projektanlage Kenntnisse Sonstiges

Basisinformationen

Mitarbeiter	002 Schaub Peter	Kontakt	CS Consult Systeme AG
Referenz	Projectile#Version 5.X	Vertriebsphase	04 - Präsentation
Thema	Einführung im SAP-Umfeld		
Potenzial	A-Potential	Handlungsbedarf	Signifikant
Bemerkung			

Forecast

Wahrscheinlichkeit	50,00 %	Auftragseingang	01.12.2019
Dienstleistung	16.000,00 EUR	gewichtete Dienstleistung	8.000,00 EUR
Lizenzen	45.000,00 EUR	gewichtete Lizenzen	22.500,00 EUR
Wartung	4.500,00 EUR	gewichtete Wartung	2.250,00 EUR
Auftragswert	65.500,00 EUR	gewichteter Auftragswert	32.750,00 EUR
Budget	EUR	gewichtetes Budget	0,00 EUR

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Basisinformationen

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Referenz: Projectile#Version 5.X Vertriebsphase: 04 - Präsentation

Thema: Einführung im SAP-Umfeld

Potenzial: A-Potential Handlungsbedarf: Signifikant

Bemerkung:

Forecast

Entscheidungsträger

Entscheidungsträger

	Anspruchspartner	Rolle	Einfluss	Haltung	Grund	Entscheidungskriterien	Geschäftsziel	Persönliches Ziel
1	Nahl Lisa	Entscheider	Gross	02 - Positiv	Integration	Schnittstellen		
2	Sander Peter	Genehmiger	Mittel	01 - Begeistert	Integration, Fu...	REST-API		

- **Basic Information:**

- **Contact:** This field assigns the sales funnel to the corresponding contact.
- **Employee:** This field indicates the person who entered the sales funnel. The employees can be defined and changed in the document category [employee](#).
- **Comment:** A comment on the sales funnel can be entered here.

- **Classification:**

- **Reference:** The reference types stored in the collection can be defined and selected in the Reference field (for example, training courses, workshop, and so on).
- **Sales Phase:** In the Sales Phase field, you can define and select the sales phases defined in the collections (see administration guide) (for example, first contact, qualified contact, information material, presentation, quotation, and so on).
- **Subject:** The subject of the sales funnel can be entered in this field.
- **Potential:** In the Potential field, you can store the gradations defined in the collections (see administration guide) with regard to the quality of the business contacts (for example, A, B or C contacts).
- **Need for Action:** In the Need for Action field, you can enter the levels defined in the collections (see the administration guide) with regard to the need for action by the interested party (for example, Low, Significant, Mandatory, and so on).

- **Forecast:**

- **Probability:** The order probability of the sales activity is stored here.
- **Incoming Orders:** The time of the presumed incoming orders of the sales activity is stored here.
- **Effort in Hours:** For service projects, the potential effort in hours (or man-days) can be entered here.
- **Price:** For service projects, the potential hourly rate can be entered here.
- **Service:** A potential order value for services can be entered directly here.
- **Weighted Service:** The potential order value for services is displayed here, taking into account the order probability.
- **Licenses:** The potential order value for services is displayed here, taking into account the

- order probability.
- **Weighted Licenses:** The potential order value for licenses under consideration of the order probability is displayed here
- **Maintenance:** A potential order value for maintenance can be entered here directly.
- **Weighted Maintenance:** The potential order value for maintenance is displayed here, taking into account the order probability.
- **Order Value:** The potential order value of the sales activity is stored (or calculated) here.
- **Weighted Sales Order Value:** The total potential sales order value, taking into account the sales order probability.
- **Budget:** The overall budget of the sales activity can be stored here.
- **Weighted Budget:** The potential total budget is displayed here, taking into account the order probability.
- **Decision Makers:** Any number of decision makers with their settings for the distribution funnel can be stored here. These persons and their settings can be defined in the document decision makers.

Project Creation

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Dokument Bearbeiten Ansicht Aktionen

Stammblatt **Projektanlage** Kenntnisse Sonstiges

Eckdaten

Projektname: Einführung bei Consult mit SAP-Schnittstellen

von: 02.12.2019 bis: 30.04.2020

Unit: Abteilung A

Projektmanager	Vorname	Name	Telefon	Mobil	E-Mail
1	Olivia	Jansen	- 11		

Attribute

Priorität: 3 - normale Priorität

Projektart: Einführung

Produkt: Projectile Version 5.X

Strategie: 2 - mittel

- **Key Data:**
 - **Project Name:** This field identifies the future project.
 - **Projekt Period from/to:** The field “from” defines the expected project start and the field “to” defines the expected project end of the potential project.
 - **Unit:** This field defines the unit responsible for the later project (usually a location or a department). Units can be edited in the Unit mask.
 - **Project Manager:** This field identifies the potential project manager of the later project.
- **Attributes:**
 - **Priority:** This field indicates the priority of the potential project.
 - **Project Type:** This field assigns a definable project type to the project, which can be used as a selection criterion in the evaluations.
 - **Product, Strategy:** These fields classify the future project and are selection criteria for

portfolio management and project evaluations.

Skills

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Stamblatt Projektanlage **Kenntnisse** Sonstiges

IT-Fähigkeiten

Gruppe	Bezeichnung
1 ERP	Fortgeschritten
2	Spezialist

Sprachfähigkeiten

Gruppe	Bezeichnung
1	deutsch
2	englisch

Soft-Skills

Bezeichnung
1 Motivation
2 Teamführung

- **IT Skills and other IT Skills:** In these selection fields you can enter the type of skills (basic, advanced, specialist).
- **Language Skills and other Language Skills:** The language of the contact is entered in this selection field (German, English, French). Here is defined exactly according to mother tongue, basic knowledge or business fluency.
- **Soft Skills:** This selection field contains various soft skills such as communication, self-study or team leadership.

Miscellaneous

	Datum	Mitarbeiter	ToDo	Ansprechpartner	Bemerkung	abge
1	28.10.2019 10:00	004 Schmidt Norbert	Präsentation	Nahl Lisa	Präsentation Schnittstellenkonzept	<input type="checkbox"/>

- **Technical Settings & Details**

- **int. Key:** This number is assigned automatically. It uniquely identifies the sales funnel in the system.

Actions

- **Create Project:** With the help of this action a project can be generated from the sales funnels.

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