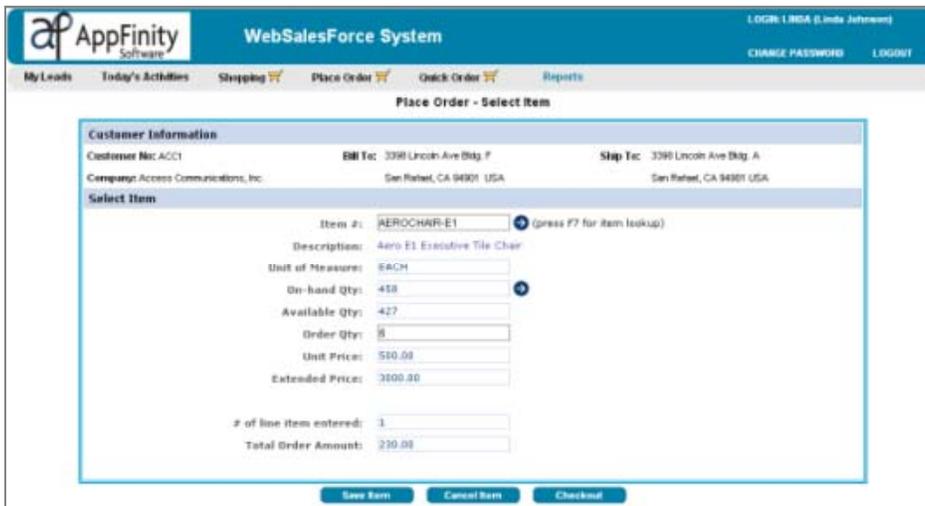


## AppFinity WebSalesForce

**Customizable e-commerce solution offering real-time integration between YOUR website and accounting system!**

### FACT SHEET

AppFinity WebSalesForce is a Web-based ordering system that provides the tools you need to track your leads and sales activities. The software also gives your salespeople the flexibility to place sales orders and quotes for their own customers directly into your Sales Order module over the Internet. With WebSalesForce, your salespeople do not have to be in the office to place orders or access their own customers' information.



Your salesperson can automatically calendar all the activities and tasks that need to be done and place all the correspondences and activities in one central location for easy access. With this, they can closely follow through the stages of each deal and reap all the benefits from every opportunity.

Sales quotations and order transactions placed online are entered into your accounting database as if they were placed through the accounting system. Order status, inventory availability and customer account information are always automatically updated. Data entered over the Internet is read and written to your database online in real time.

If you have multiple sales offices and a centralized accounting department to process your shipments and billing, WebSalesForce is the perfect solution. The system enables your sales professionals throughout your remote office locations to access your central accounting database to quote prices, place orders and check the status of their transactions.

### Key Benefits

- Maintains sales reps' schedules and activities to closely monitor leads and sales activities.
- Increases sales reps' productivity by providing accurate and updated data when analyzing sales trends.
- Enables salespeople to place orders and check inventory status online.
- Online, real-time integration with AccountMate for SQL.

[www.appfinity.com](http://www.appfinity.com)

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**WebSalesForce Key Features**

**View Salesperson’s Customers And Activities**

WebSalesForce is designed to display only information that is related to customers of a particular salesperson. A salesperson is assigned to each customer account by entering a value in the “Salesperson” field of the Customer Maintenance record. The system then automatically sets a filter to the databases and the login so that salespeople can only access their own customers’ data.

With this enhanced level of data security, your salespeople only have access to view quotes, orders, balances and statements for their own customers. Thus, a salesperson cannot view sales orders or quote transactions for other sales professionals’ customers.

**Leads And Activities**

The “My Leads” function enables your sales team to keep track of their leads. The function lists all the leads assigned to the salesperson currently logged in. A salesperson can create, update or remove a lead. In the summary window, the following information is shown: inquiry date, lead number, company name, city, state and zip, and phone number, and whether the lead record is stored in AccountMate or not. For each lead, **Activities** can be created to record all correspondences, schedule activities, set up appointments and follow up on action items about leads. This function allows the salesperson to keep track of the status of each lead as it progresses through the sales cycle.

Activities can be classified by *status* (open or closed), *nature* (phone call, meeting, task, note or other) and *type* (general, sales or support). When listed in the “Lead Detail” page, these classifications provide salespeople with a summary view of the activities on which they need to focus. With integration to AccountMate for SQL, leads and activities created are automatically uploaded to your accounting database in real time.

**WebSalesForce System** | LOGIN: LINDA (Linda Johnson) | CHANGE PASSWORD | LOGOUT

My Leads | Today's Activities | Shopping | Place Order | Quick Order | Reports

**Lead Detail**

Buttons: New Activity, Save, Delete, Back to My Leads

**Lead Information**

Inquire Date: 07/12/2009 | Create Date: 7/12/2009 | Web Site:

Company Name: Computer Suppliers | E-Mail:  [Andy@computer.com](mailto:Andy@computer.com)

Address: 434 Rodeo Drive | Tel: 425-8666-3434

City: San Francisco | Fax:

State: California | Zip: 94949 | First:  Last:

Country: USA | Save into VAM:  | Lead #: 004333

Class: Home or Home Office | Notes: From the trade show.

**Activities**

#	Start Date	Start Time	Handled By	Activity	Status	Remarks
100000002	07/12/09	10:44	Linda Johnson	Phone Call	Open	Call to schedule for product dem.
100000003	07/12/09	11:02	Linda Johnson	Meeting	Open	Check the warranty of the products.
100000004	07/11/09	11:04	Linda Johnson	Phone Call	Open	Sales discussion.

## Manage Existing Customers

The "Customer Listing" from the Reports function provides information about each salesperson's existing customers. Salespeople can review the transaction history for each customer. The following sales documents are available for viewing in the WebSalesForce system. These documents are helpful to salespeople in identifying any sales trends of their customer base. With all the essential data in one place, your salespeople can easily manage their accounts and optimize their sales performance.

- **Sales Quotes**

The **Sales Quote** menu shows the open quotes that are yet to be converted into orders. The list displays the document number and date, customer code, customer's purchase reference number, and sales quote amount. Salespeople can click on the sales quote number to display the document and review the line items.

- **Sales Orders**

The **Sales Order** menu shows a list of all sales orders assigned to each salesperson. It displays the document number and order date, customer number and purchase reference number, shipping type, and total order amount. When clicking the Sales Order number link, the order is displayed to view more details of the order.

- **Invoices**

The **Invoice** menu generates a list of invoices assigned to each salesperson. For each invoice, the total invoice, paid and unpaid amounts are shown in the grid. To view the line items covered by the invoice, a salesperson can click on the invoice number link.

Sales quotes, orders and invoices can be printed in the Preview mode. For sales orders and invoices, the list can be defined to show outstanding or open documents only. It can also be filtered by customer or by date range.

- **Statement**

With the **Statement** link, your salespeople can view or print a Customer's Statement showing a list of all invoices with their invoice and due dates, invoice amounts and outstanding balances. The statement also lists all payment information: payment dates, check numbers and payment amounts. The statement displays the total of all sales billed to the customer from the time the customer record was set up until the current date, including any beginning balance that was recorded.

Sales quotes, orders and invoices are also available for viewing under the "Reports" function.

## Access Rights

The "Access Setup" function of the Administration program enables you to define the access rights of each salesperson to the client program, the item records that will be available for display and the payment terms that will be used in the system.

## Reminder Tool

Without a built-in reminder tool, your salespeople could miss crucial activities that are vital to the success of their sales process. To this end, a "Today's Activities" function acts as an automated reminder program which provides a snapshot of each salesperson's scheduled activities for the day.

**Item Details**

The “Item Listing” option from the “Reports” function displays the item codes, descriptions and current sales prices of your items. Salespeople can get additional information about the item by clicking on the Item Description link. The details page shows the item's current price, on-hand and available quantities, and the item's image from the Inventory Maintenance record.

**Convenient Order Entry**

Salespeople have three (3) ways to enter their customers’ orders, depending on how familiar they are with the products.

**Shopping**

For a new salesperson who is not familiar with your item codes, the "Shopping" function is a helpful aid. To create the order, the salesperson selects the customer code from the list, which then displays a list of items available for browsing.



An item can be searched by item description or item number. For example, entering "IBM" in the Search field will list all the item #'s and descriptions containing “IBM”. The items are sorted in alphabetical order; the salesperson can then select the item # for more information. To continue with the order entry process, the salesperson can update the “Order Quantity” field or add more items before proceeding to the “Checkout” screen.

**Place Order**

The “Place Order” function enables easy input of item codes. This is applicable if the salesperson already knows the item codes and no need to browse and select items from a grid. An item code lookup is also available in case the user wants to search for items.

**Quick Order**

The “Quick Order” function enables salespeople to copy line items from their previous sales orders and invoices. Products from the copied order or invoice are listed so that they can confirm the items and update their required quantity. An item search feature is also available to browse for more items that need to be added to the new order.

**Checkout**

Once salespeople have completed an order, they can click the “Checkout” button to save the order. On the Checkout screen, customer information from the accounting database is automatically loaded as a default. From this screen, a salesperson can update the shipping terms, enter applicable discounts, change the shipping address and enter order remarks.



Depending on the salesperson's access rights, the option(s) to save the document as a sales quote and/or as a sales order will be available. An email will be sent to the company administrator. This alerts the company of new incoming orders, ensuring that they can be processed immediately.

**Admin Reports**

The function provides summary and detailed order reports, plus item and salesperson access setups, including their access logs.

Visit our website at [www.appfinity.com](http://www.appfinity.com) to get more information about the AppFinity WebSalesForce system. To view a self-running demo, go to the **Online Demos** page of our website.