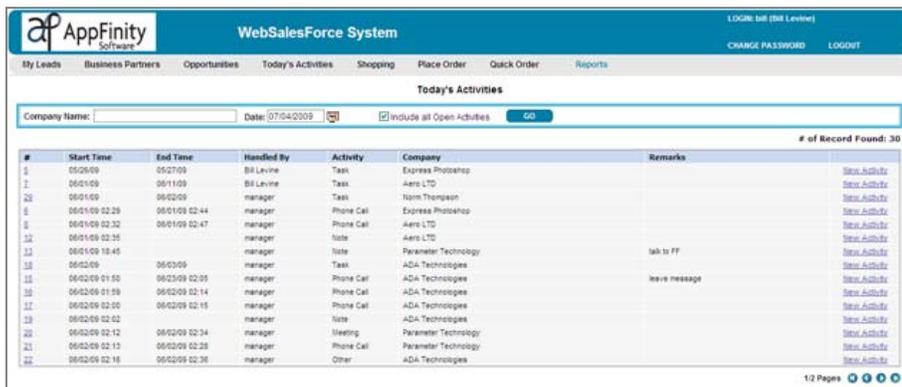


AppFinity WebSalesForce

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

FACT SHEET

AppFinity WebSalesForce is a Web-based CRM and ordering system that provides the tools you need to track your leads and opportunities. 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.



#	Start Time	End Time	Handled By	Activity	Company	Remarks
1	05/26/09	05/27/09	Bill Levine	Taxi	Express PhotoShop	
2	06/01/09	06/11/09	Bill Levine	Taxi	Aero LTD	
20	06/01/09	06/02/09	manager	Taxi	Norm Thompson	
8	06/01/09 02:29	06/01/09 02:44	manager	Phone Call	Express PhotoShop	
6	06/01/09 02:32	06/01/09 02:47	manager	Phone Call	Aero LTD	
11	06/01/09 02:35		manager	note	Aero LTD	
13	06/01/09 15:45		manager	note	Parameter Technology	talk to FF
18	06/02/09	06/03/09	manager	Taxi	ADA Technologies	
15	06/02/09 01:50	06/02/09 02:05	manager	Phone Call	ADA Technologies	leave message
16	06/02/09 01:59	06/02/09 02:14	manager	Phone Call	ADA Technologies	
17	06/02/09 02:00	06/02/09 02:15	manager	Phone Call	ADA Technologies	
19	06/02/09 02:02		manager	note	ADA Technologies	
20	06/02/09 02:12	06/02/09 02:34	manager	Meeting	Parameter Technology	
21	06/02/09 02:13	06/02/09 02:28	manager	Phone Call	Parameter Technology	
22	06/02/09 02:16	06/02/09 02:36	manager	Other	ADA Technologies	

Your salesperson can automatically calendar all the 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 opportunities.
- 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 SAP Business One.

www.appfinity.com

Contact Us

Sales and Free Consulting Inquiries

Phone: 415.668.1100
 Email: sales@appfinity.com

General Information

Email: info@appfinity.com

www.appfinity.com

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 Business Partner (Customer) Master Data 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. For each lead, **Activities** can be entered to note all correspondences and transactions that pertain to each lead, from initial meeting to sending a business proposal, from sales delivery to invoicing and payment. In this area, you can update activity data, organize meetings, follow up on action items, record essential information about leads and track the status of each opportunity as it progresses through the sales cycle.

Any marketing document (e.g., sales order, invoice or delivery) created in SAP Business One is readily available for linking to the activity. Likewise, documents can be uploaded and attached to the activity. 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” main page, these classifications provide salespeople with a summary view of the activities on which they need to focus. With integration to SAP Business One, leads and activities created are automatically uploaded to your accounting database in real time.



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. For each activity, the planned start and end times are listed, including the type of activity, the company name and person currently responsible for the activity. By default, the system displays all the activities for all the customers for the current day. Your salespeople can use the “Company Name” field to select a customer and show only activities that apply to that customer. An option is also provided to include open activities commencing on other dates.

Opportunities

In the “Opportunities” function, the system displays a summary list of all possible deals for each salesperson’s customer base and enables the salesperson to create new opportunities on the fly. When integrated with SAP Business One, the information is linked and updated online, in real time. The data appears in SAP Business One’s Sales Opportunity function and shows the customer code and name, contact person, the current status of the opportunity (i.e., Won or Open), and a Closing Percentage indicator that displays the chances for turning the opportunity into a sale.

Click on the Opportunity Number link to view vital information about the opportunity or to amend the details when necessary. The window shows the anticipated closing date, potential amount of the opportunity, and the stages/activities completed or in process for the selected opportunity. It also displays the weighted amount which reflects the opportunity’s current value after taking into consideration the different stages/activities that have been completed. If related partners and competitors are defined for this opportunity, the information will also be displayed, including the associated documents created in SAP Business One.

View Opportunity

Opportunity Information

Business Partner Code: C40003	Opportunity Name:
Business Partner Name: StoneWare Systems	Opportunity No: 23
Contact Person: Nina Smith	Status: Open
Invoices Amount: 405.00	Start Date: 01/06/2005
BP Territory:	Closing Date: 01/06/2005
Sales Employee: Bill Levine	Open Activities: 1
Owner: Sales Manager	Closing %: 35%

Potential

Predicted Closing In: 1624 Days	Interest Range				
Predicted Closing Date: 06/18/2009	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Description</th> <th>Primary</th> </tr> </thead> <tbody> <tr> <td>Lexmark Printers</td> <td>II</td> </tr> </tbody> </table>	Description	Primary	Lexmark Printers	II
Description	Primary				
Lexmark Printers	II				
Potential Amount: 300.00					
Weighted Amount: 105.00					
Gross Profit %: 100.00					
Gross Profit Total: 300.00					
Level of Interest: Med					

General

BP Channel Code:	Project:
BP Channel Name:	Information Source: AWD
BP Channel Contact:	Industry: HFG
Remarks:	

Stages

Start Date	Closing Date	Sales Employee	Stage	%	Potential Amount	Weighted Amount	Document Type	Show BPs Docs
01/06/05	01/06/05	Sophie Klapp	Lead	0	22,000.00	1,320.00		
06/18/09	06/18/09	Sophie Klapp	Tel Meeting	25	300.00	105.00	Sales Quotations	

Manage Existing Customers

The "Business Partner" function provides information about each salesperson's existing customers. Salespeople can review the **Activities** created for each customer, set up appointments, create reminders to call again on a certain date, and take note of their preferences and needs, among other options. This tool helps prevent missing any follow-up calls or losing track of valuable correspondence or documents sent to a customer. With all the essential data in one place, your salespeople can easily manage their accounts and optimize their sales performance.

The following sales documents are available for viewing in the WebSalesForce system through the "Reports" menu. These documents are helpful to salespeople in identifying any sales trends of their customer base.

- **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 name, sales quote amount and transaction currency. 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 total order amount, open amount and transaction currency, and more. When clicking the Sales Order number link, the order is displayed and you can view applicable shipment details, order quantities and backorder quantities.

- **Invoices**

The **Invoice** menu generates a list of invoices assigned to each salesperson. For each invoice, the total invoice and unpaid amounts are shown in the grid. To view the line items covered by the invoice and any payments made to date, 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.

- **Statements**

With the **Statements** menu, 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.

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

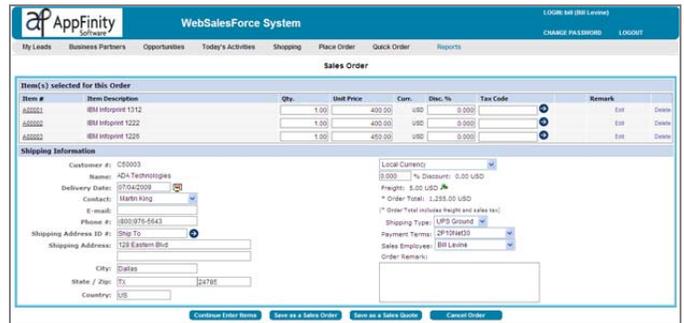
The "Place Order" function enables easy input of item codes. This is applicable if the salesperson already knows the item codes.

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 and payment 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.



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 Item Master Data record.

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.

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 to get more information about the AppFinity WebSalesForce system. To view a self-running demo, go to the **Online Demos** page of our website.