

BP-C4C_銷售模組

教育訓練手冊

V1.1

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謹製

本手冊著作權屬英渥德科技股份有限公司所有

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壹、基本功能(BP-C4C-010)

一、主要作業畫面

(一) 作業目的：

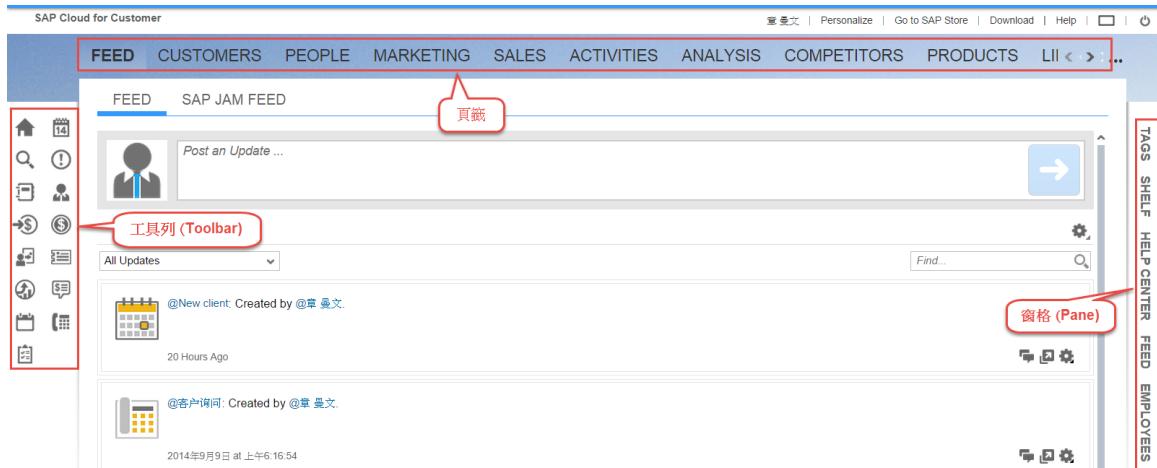
此畫面是使用者使用 C4C 的主要作業畫面，類似 Windows 的桌面，可供存取各項作業。

(二) 存取方法：

路徑	使用者登入 C4C 後
----	-------------

(三) 操作說明：

1 主要作業畫面範例如下，工具列、頁籤與實際作業時的項目多寡可能不同：



- 1.1 工具列(Toolbar)：位於畫面的左邊，例如：首頁、搜尋、日曆及各類項目的建立(客戶、聯絡人、銷售線索..)等。
- 1.2 窗格(Pane)：位於畫面的右邊，供使用者快速查詢或提供捷徑，例如：標記、書架、產品等。
- 1.3 頁籤：位於畫面的上方，依使用者的權限顯示各項作業，例如：客戶、活動、分析等。
- 2 畫面右上方有一功能列：



- 2.1 **Personalize**：供作個人化的設定，例如：背景圖片、日期格式及某一作業畫面的設定等。
- 2.2 **Help**：選此項後，將顯示下面選單：

Help Center

Make SAP Cloud for Customer Better

About SAP Cloud for Customer

2.2.1 Help Center：可供搜尋某字詞的說明文件或影片檔，即是窗格中的 Help Center。

2.2.2 About SAP Cloud for Customer：查詢 SAP C4C 的版本。

2.3 ：全螢幕。

2.4 ：登出 C4C。

二、搜尋

(一) 作業目的：

搜尋各項物件，例如：客戶、競爭者、聯絡人、銷售線索、來電及訊息源等。

(二) 存取方法：

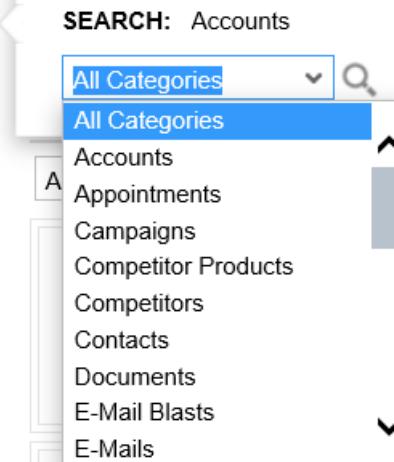
路徑	
----	---

(三) 操作說明：

1 首先顯示下面視窗，供挑選搜尋的物件類別或輸入字串：



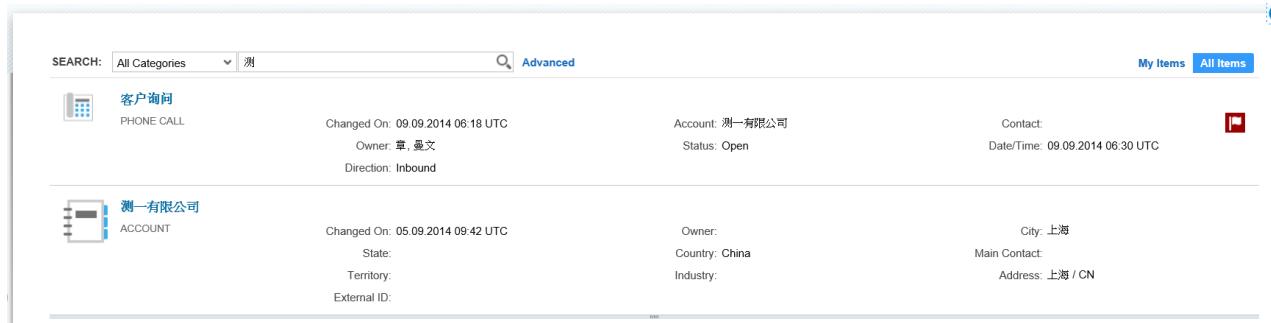
1.1 可按▼，顯示各類別供挑選：



1.2 可直接輸入字串，按執行搜尋。字串可以輸入「*」表示任意字，例如輸入「*醫院」

「*」，則會顯示所有內含「醫院」的物件。搜尋標記時，需以「#」開頭，例如輸入「#VIP」

2 搜尋結果的畫面如下：



PHONE CALL	Changed On: 09.09.2014 06:18 UTC	Account: 測一有限公司	Contact:
Owner: 章, 曼文	Status: Open	Date/Time: 09.09.2014 06:30 UTC	
Direction: Inbound			

ACCOUNT	Changed On: 05.09.2014 09:42 UTC	Owner:	City: 上海
State:	Country: China	Main Contact:	
Territory:	Industry:	Address: 上海 / CN	
External ID:			

2.1 按各物件名稱，可連結開啟該物件。

- 3 在搜尋結果畫面，按 **Advanced**，可作進階條件的輸入，All Categories 的進階條件畫面如下，不同的物件類別，進階條件畫面會不同：

SEARCH: All Categories

Changed On: To:

Owner:

Description:

ID:

三、日曆

(一) 作業目的：

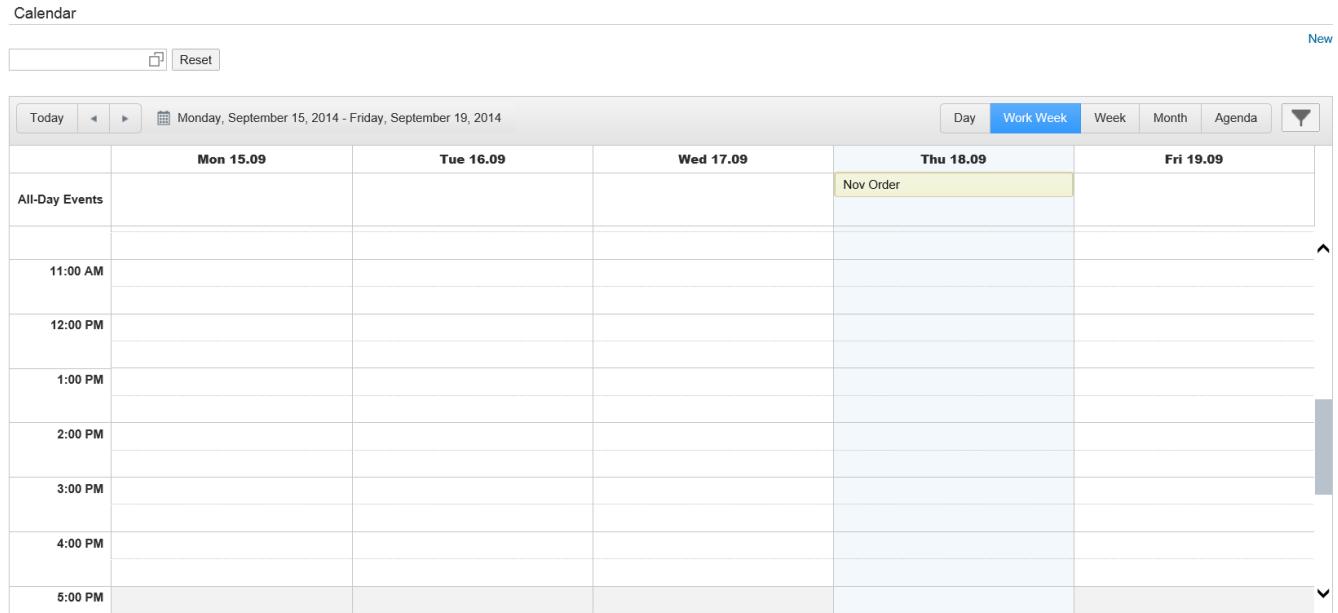
查詢或維護預約、拜訪和電話的行事曆。

(二) 存取方法：

路徑	工具列→ 
----	--

(三) 操作說明：

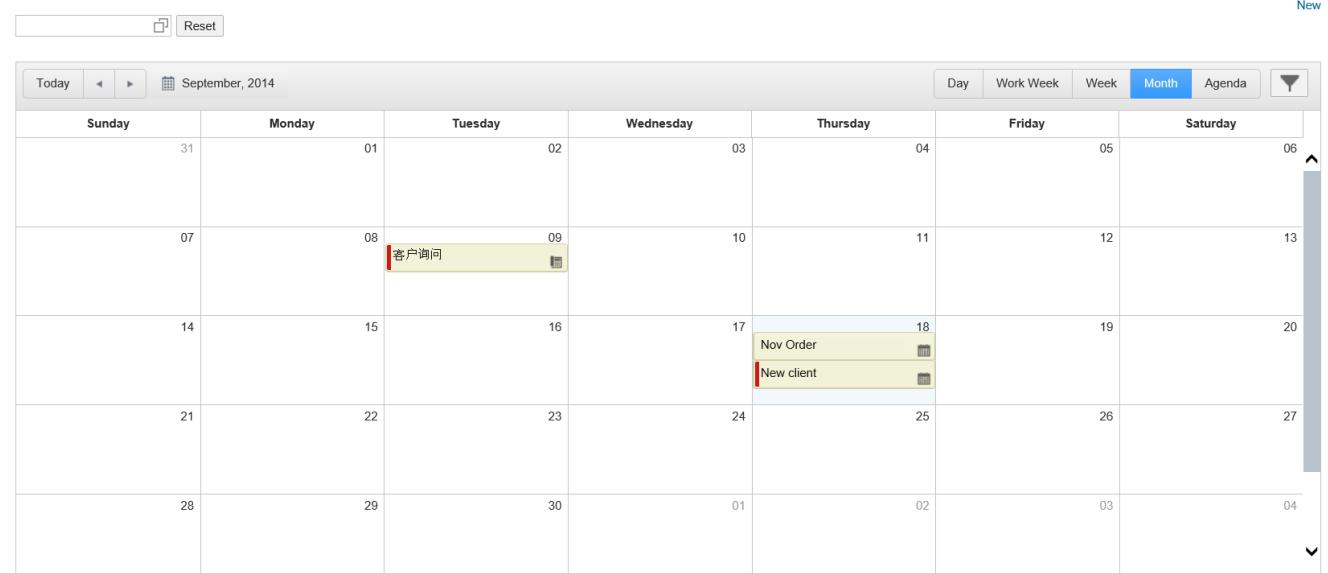
1 進入後，日曆以 Work Week(以週顯示，不含週六日)方式顯示，畫面如下：



The screenshot shows a calendar application interface. At the top, there's a header with the title "Calendar" and a "New" button. Below the header are buttons for "Today", navigation arrows, and a "Reset" button. The main area displays a weekly calendar grid for the week of September 15-19, 2014. The days are labeled "Mon 15.09", "Tue 16.09", "Wed 17.09", "Thu 18.09", and "Fri 19.09". The grid has rows for hours from "11:00 AM" to "5:00 PM". An event titled "Nov Order" is listed in the "Thu 18.09" row. The "Work Week" tab is selected in the toolbar at the top right.

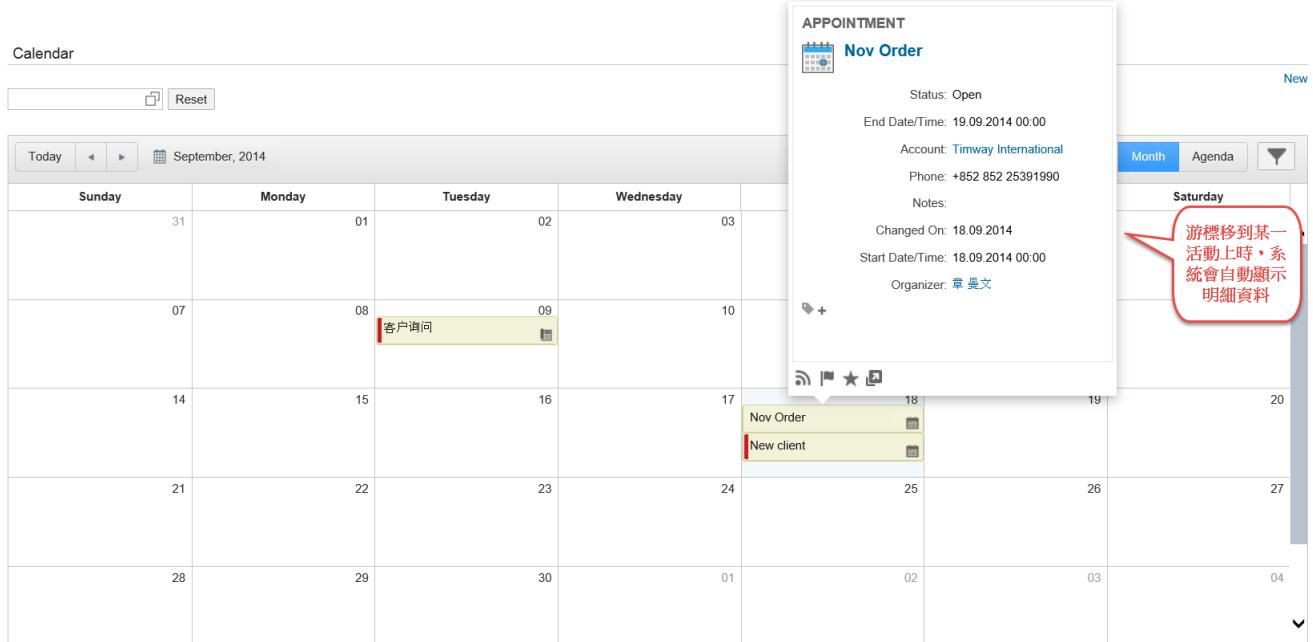
2 如果以 Month 方式顯示，畫面如下：

Calendar



The screenshot shows a monthly calendar for September 2014. The days of the week are labeled at the top: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday. The dates from 31 to 04 are listed below. A red box highlights the event '客户询问' (Customer Inquiry) on Tuesday, September 9th. A tooltip 'New' is visible in the top right corner.

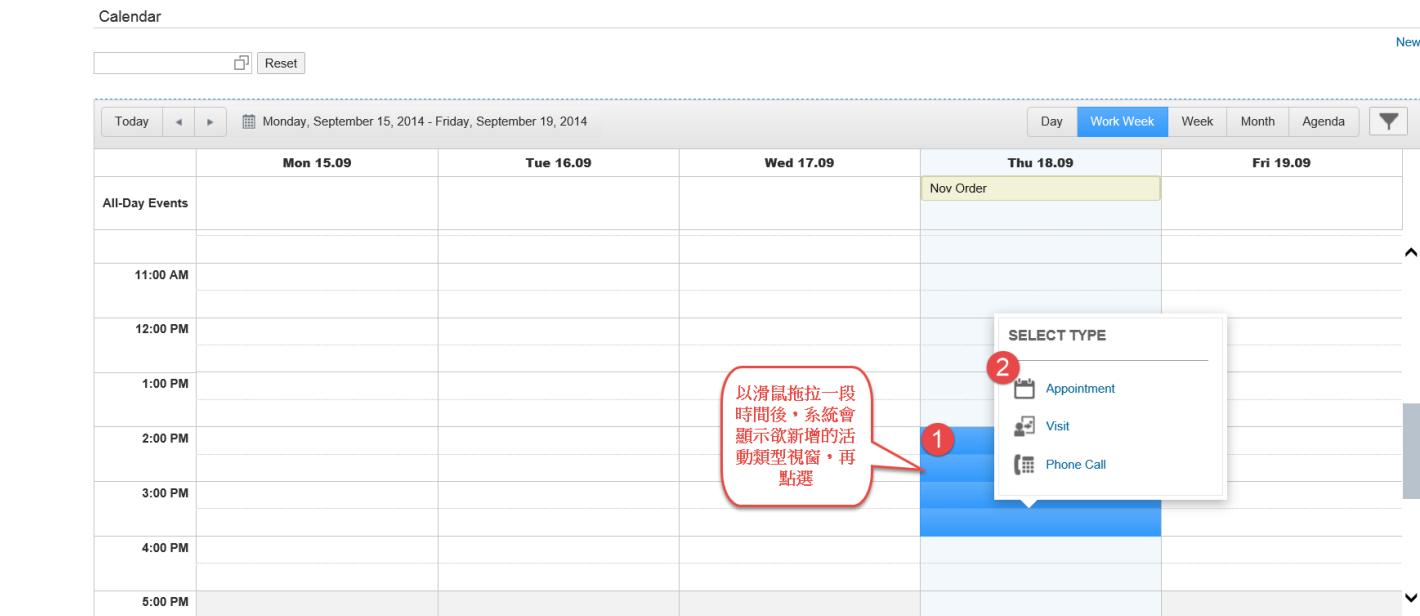
3 游標如果移到某一活動上時，系統會自動顯示該活動的明細資料：



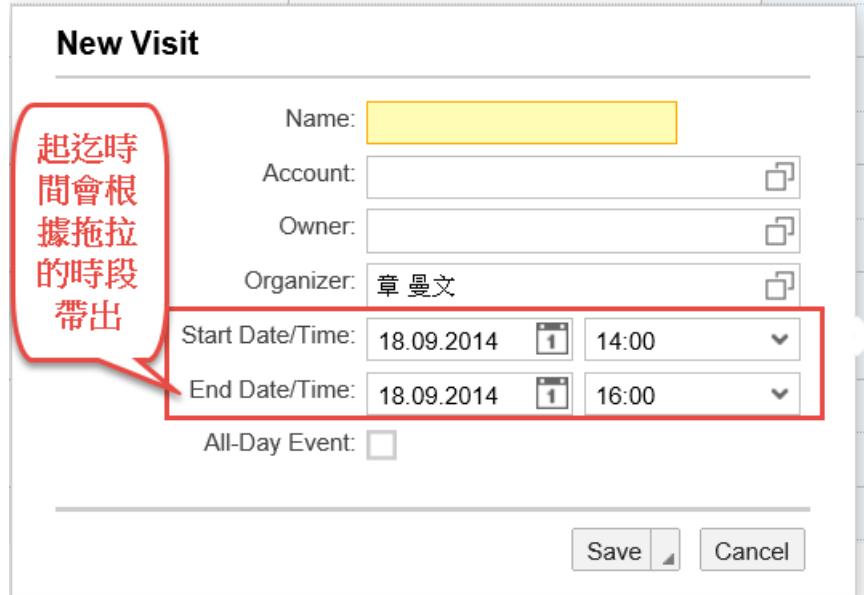
The screenshot shows a monthly calendar for September 2014. A tooltip 'Nov Order' is displayed for the event '客户询问' (Customer Inquiry) on Tuesday, September 9th. A red box highlights the tooltip area, and a red arrow points to it with the text '游標移到某一活動上時，系統會自動顯示明細資料' (When the cursor moves over an activity, the system automatically displays detailed information).

4 欲新增活動時，

4.1 可以滑鼠拖拉一段時間後，系統會顯示欲新增的活動類型視窗，供挑選：



4.2 例如選了拜訪(Visit)：



New Visit

Name:

Account:

Owner:

Organizer: 章 曼文

Start Date/Time: 18.09.2014 14:00

End Date/Time: 18.09.2014 16:00

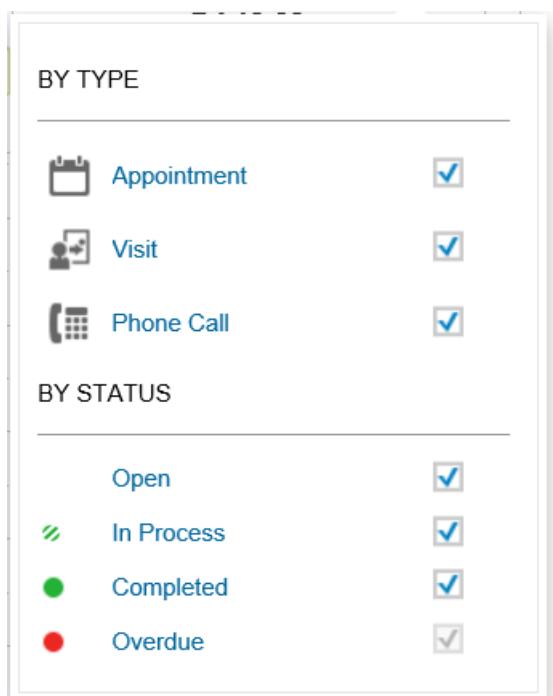
All-Day Event:

Save Cancel

起迄時間會根據拖拉的時段帶出

4.3 輸入完成後，按 **Save**  存檔。

5 可按右上角 ，顯示下面畫面，針對活動類型或狀態作篩選：



- 6 在左上角  ，選擇或輸入其他人員，可查詢該人員行事曆。按 ，可切回自己的行事曆。

四、訊息源

(一) 作業目的：

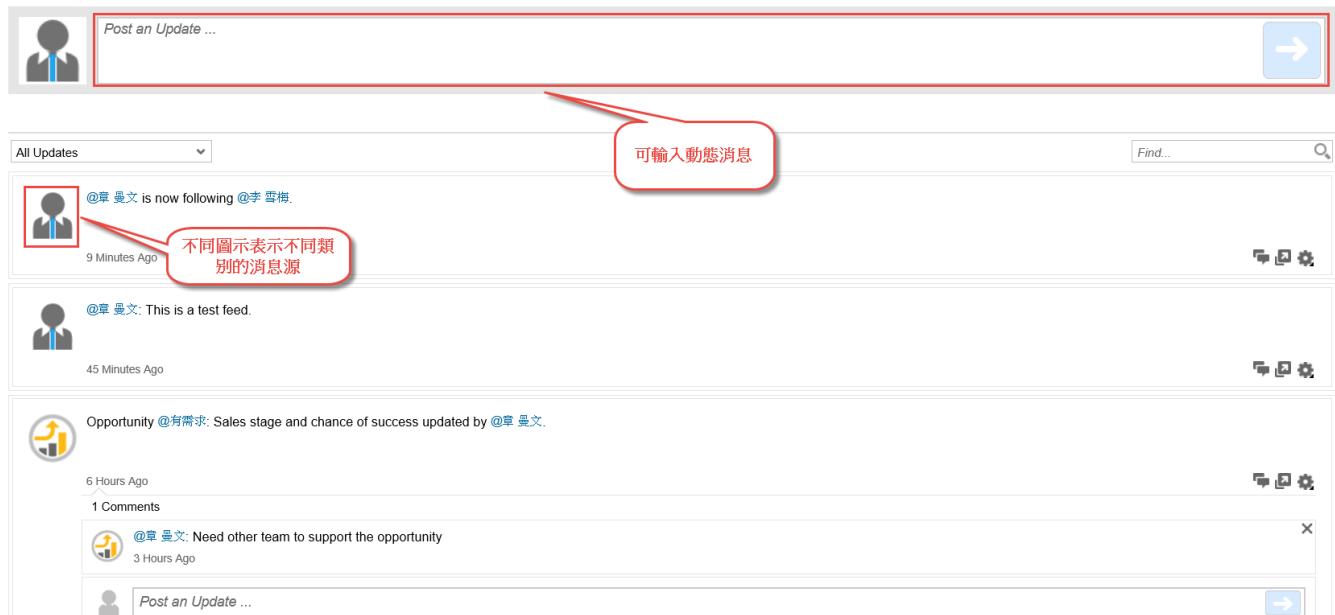
訊息源是提供所關注同事的即時訊息及後續更新，以及使用者所設定項目或系統預設項目的更新狀態。

(二) 存取方法：

路徑	頁籤→FEED(訊息源) 或 窗格→FEED
----	------------------------

(三) 操作說明：

1 下面畫面是訊息源清單範例：



1.1 如果要對某一訊息源作回應，可按 ，即可在下面畫面中輸入文字：

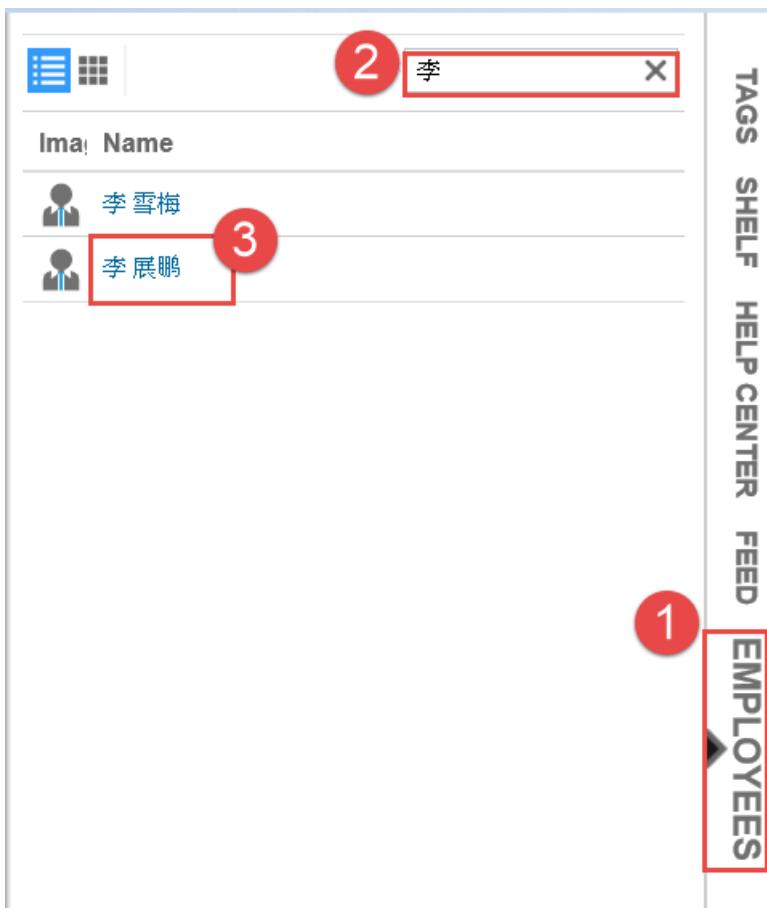


1.2 要刪除某一訊息源，可按 。

1.3 要顯示某一訊息源的明細資料，可按 。

2 要將同事列入關注對象，步驟如下，被關注的對象的動態消息，會自動顯示在自己的訊息源中：

2.1 按窗格→EMPLOYEES，輸入搜尋條件，游標移至某位同事：



2.2 顯示下列視窗後，按左下角 ，按鈕將變成 ：

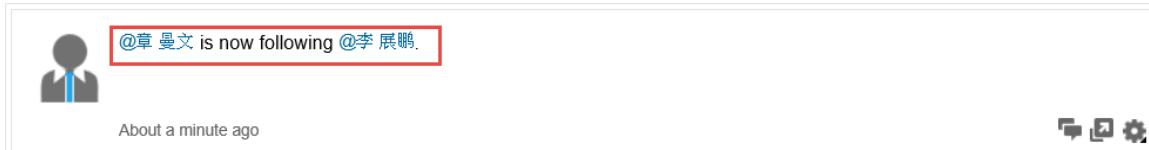
EMPLOYEE

李展鹏

Job Sales Manager
Department Sales Unit CN
E-Mail CNSalesMan@ondeman...
Phone +86 21 63751287
Mobile
Address 金桥路100号 / 上海
200065 / CN

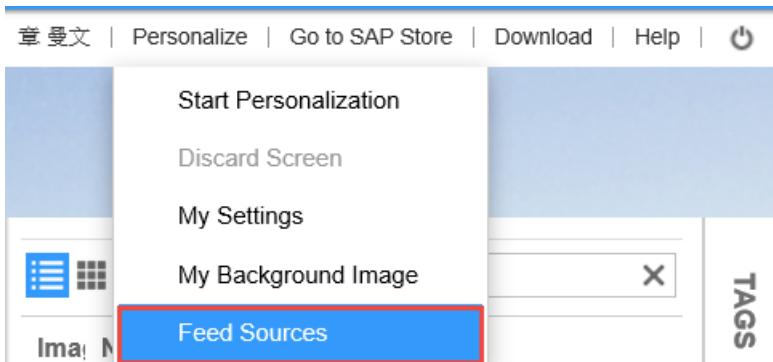
+

2.3 在訊息源會顯示該員工已被使用者關注：



3 要檢視或取消所關注的對象，步驟如下：

3.1 按 Personalize→Feed Sources：



3.2 下拉清單選 People，也可輸入條件搜尋或空白列出全部：

Feed Sources

FOLLOWING ()

Manage the sources from which you receive updates

<input style="border: 1px solid #ccc; padding: 2px 5px; margin-right: 10px;" type="button" value="People"/>	<input style="border: 1px solid #ccc; padding: 2px 10px; width: 150px;" type="text" value="Find..."/>	
---	---	--

3.3 系統根據條件列出目前所關注的對象清單，可按 取消關注：

Feed Sources

FOLLOWING (2)

Manage the sources from which you receive updates

<input style="border: 1px solid #ccc; padding: 2px 5px; margin-right: 10px;" type="button" value="People"/>	<input style="border: 1px solid #ccc; padding: 2px 10px; width: 150px;" type="text" value="Find..."/>	
李展鵬 Person		
李雪梅 Person		

4 下列事件系統預設會自動觸發訊息：

來源	事件	取消設定
客戶	建立	不可
	建立聯絡人	
	所有者或區域修改	
	以項目頁籤發布的更新	不可
機會	建立	不可
	狀態更改	
	銷售狀態更改	
	收入修改	
	類別修改	
	成功率修改	
	所有者修改	
	報價或銷售訂單建立	
	以項目頁籤發布的更新	不可
銷售線索	建立	不可
	狀態更改	
	評估等級修改	
	聯絡人建立或刪除	
	銷售線索轉換	
	所有者修改	
	以項目頁籤發布的更新	不可
聯絡人	明細資料修改	
	地址修改	
	以項目頁籤發布的更新	不可
員工	使用者更新	
	使用者請求關注你	不可
	使用者接受關注請求	不可
	使用者拒絕關注請求	不可
	活動建立或修改	
	個人動態	不可
訊息源清單	評論或回覆	不可
群組	成員增加或刪除	

五、書架

(一) 作業目的：

查詢所收藏或設旗標的清單，在清單中可快速存取該項目。

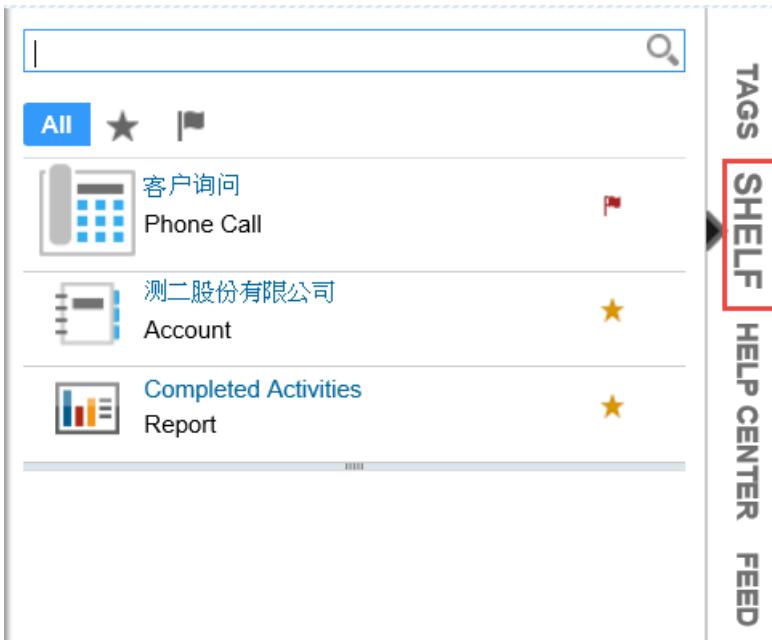
(二) 存取方法：

路徑	窗格→ SHELF
----	-----------

(三) 操作說明：

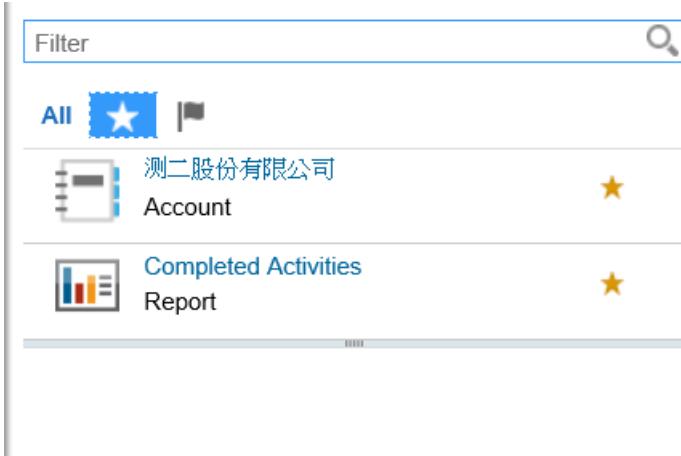
1 進入後，共分三個頁籤：

1.1 第一頁籤是全部的收藏及旗標：



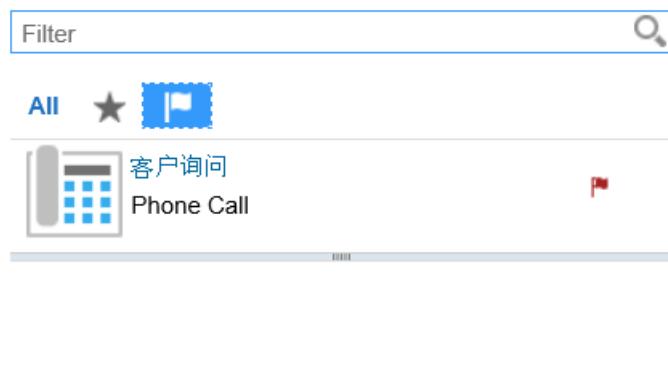
Icon	Name	Rating
Phone icon	客户询问 Phone Call	■
Account icon	测二股份有限公司 Account	★
Report icon	Completed Activities Report	★

1.2 第二頁籤是收藏清單：



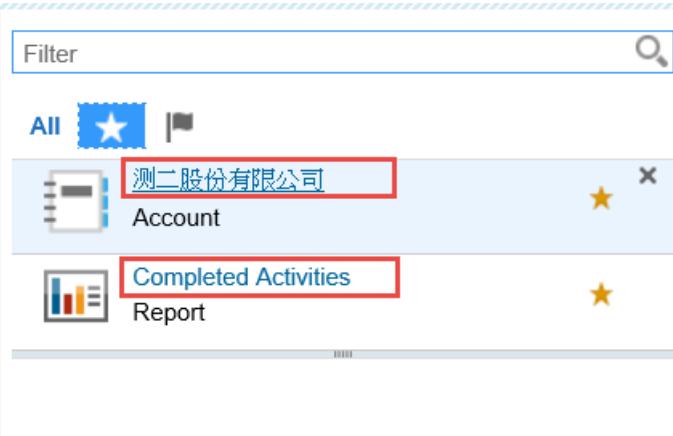
Icon	Name	Rating
Phone icon	客户询问 Phone Call	■
Account icon	测二股份有限公司 Account	★
Report icon	Completed Activities Report	★

1.3 第三個頁籤的旗標清單：

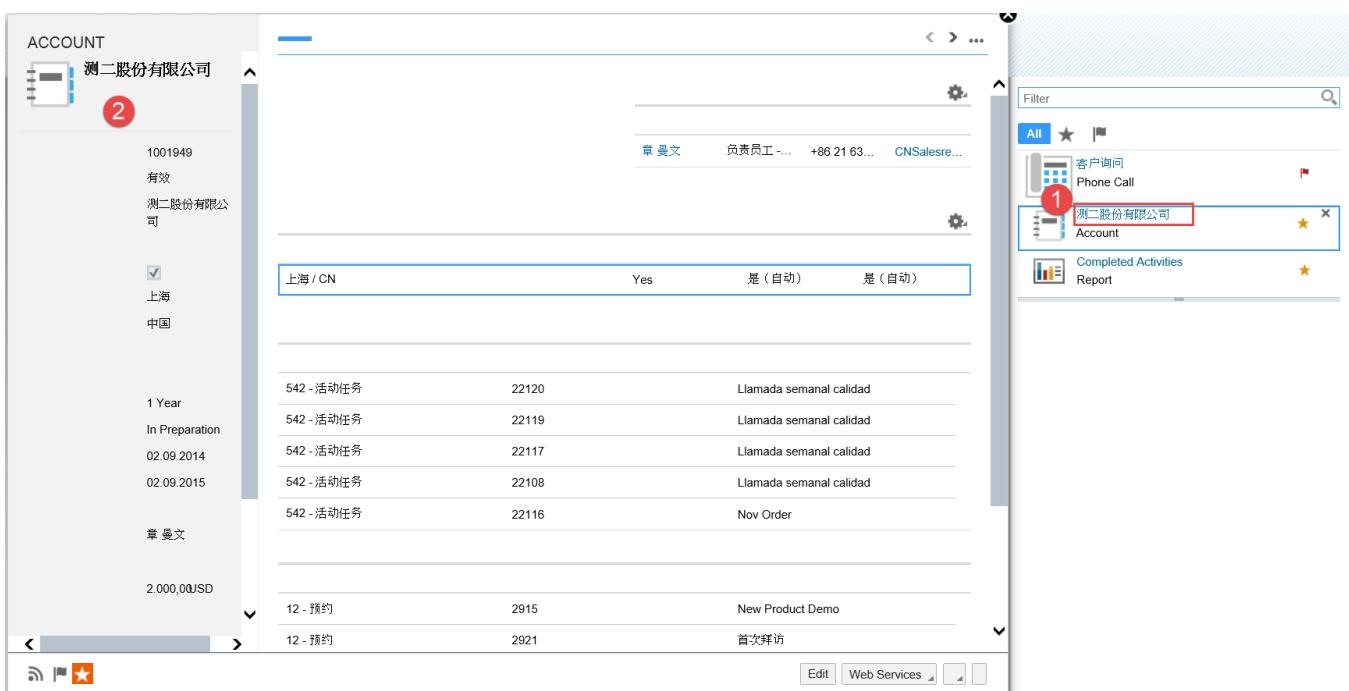


2 在清單中，可快速開啟書架中的項目：

2.1 在某一項目上，點選該項目：



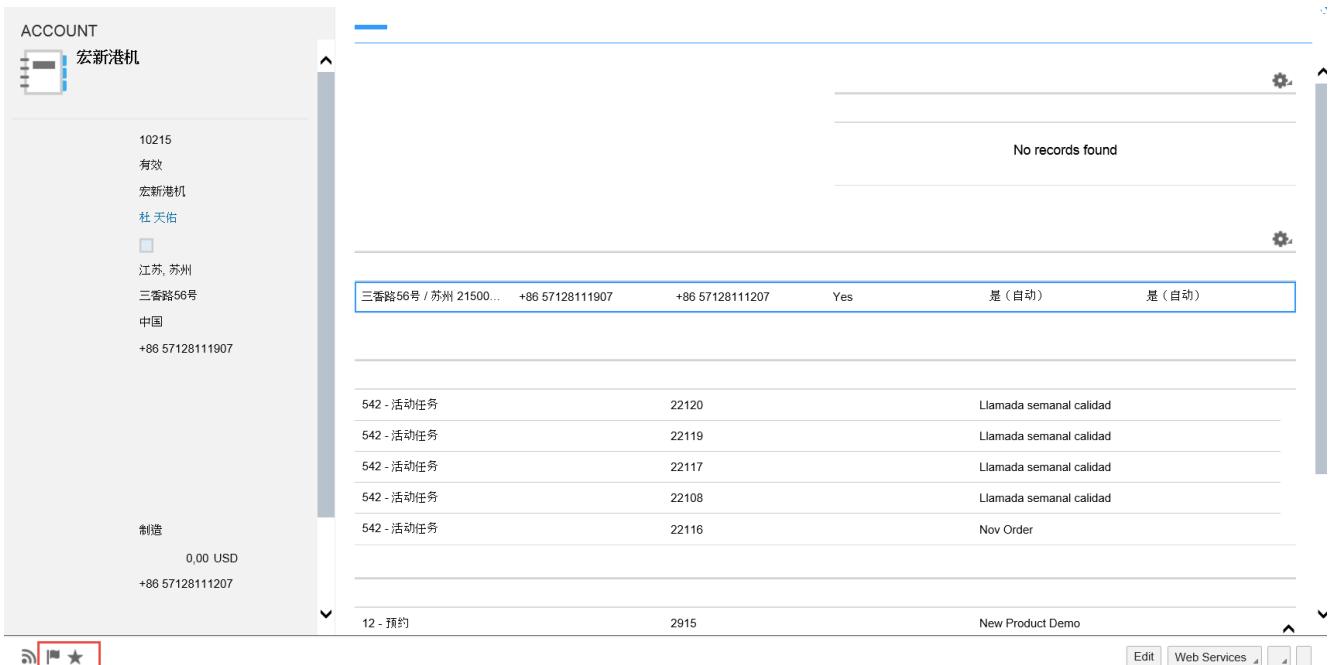
2.2 點選後，系統即會在左邊顯示該項目的明細資料：



活动任务	开始日期	结束日期	状态
542 - 活动任务	2014-09-02	2014-09-02	完成
542 - 活动任务	2014-09-02	2014-09-02	完成
542 - 活动任务	2014-09-02	2014-09-02	完成
542 - 活动任务	2014-09-02	2014-09-02	完成
542 - 活动任务	2014-09-02	2014-09-02	完成
542 - 活动任务	2014-09-02	2014-09-02	完成
12 - 预约	2014-09-02	2014-09-02	完成
12 - 预约	2014-09-02	2014-09-02	完成

3 收藏或設旗標某一項目的步驟：

3.1 開啟項目的明細資料，按左下角  (收藏) 或  (旗標)，會變成  或 ：



ACCOUNT

宏新港机

10215
有效
宏新港机
杜天佑

江苏, 苏州
三香路56号
中国
+86 57128111907

No records found

三香路56号 / 苏州 21500... +86 57128111907 +86 57128111207 Yes 是 (自动) 是 (自动)

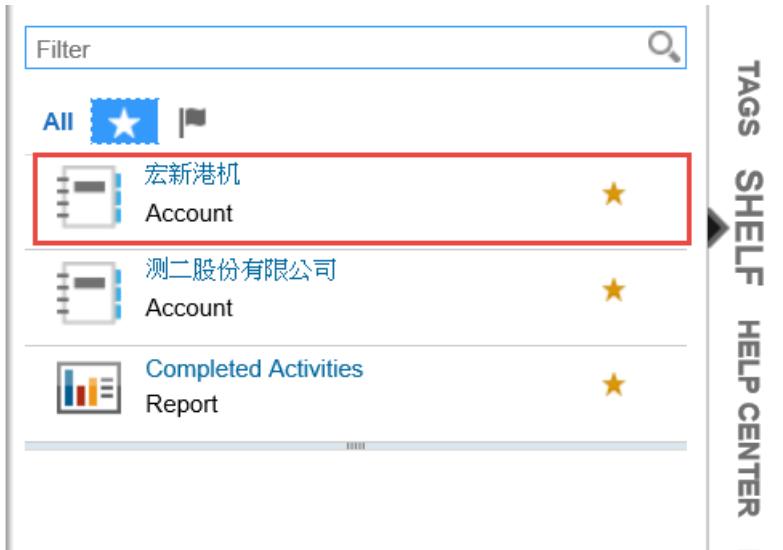
542 - 活动任务	22120	Llamada semanal calidad
542 - 活动任务	22119	Llamada semanal calidad
542 - 活动任务	22117	Llamada semanal calidad
542 - 活动任务	22108	Llamada semanal calidad
542 - 活动任务	22116	Nov Order

制造
0,00 USD
+86 57128111207

12 - 预约 2915 New Product Demo

3.2 在書架的清單中，即會增加此一項目：



Filter 

All  

 宏新港机 Account	
 测二股份有限公司 Account	
 Completed Activities Report	

TAGS SHELF HELP CENTER

3.3 要移除書架清單中的項目，將游標移到該項目上，按該項目右上角的 ：

The screenshot shows a software interface with a sidebar on the left. At the top of the sidebar is a search bar labeled "Filter" with a magnifying glass icon. Below the search bar are two filter buttons: "All" (selected) and a star icon. To the right of the sidebar is a main content area. In the center of the content area is a shelf menu with three items: "TAGS", "SHELF" (which is currently selected, indicated by a downward arrow), and "HELP CENTER". Below the shelf menu is a list of three items:

Icon	Name	Status
Account	宏新港机	★ (with a red-bordered 'X' box)
Account	测二股份有限公司	★
Report	Completed Activities	★

六、標記

(一) 作業目的：

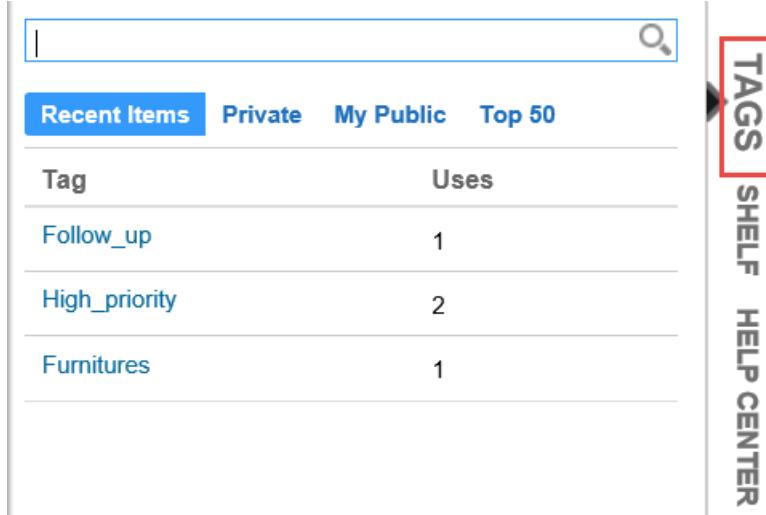
針對項目分類，並賦予一標籤名稱，以利於快速存取或搜尋。

(二) 存取方法：

路徑	窗格→TAGS
----	---------

(三) 操作說明：

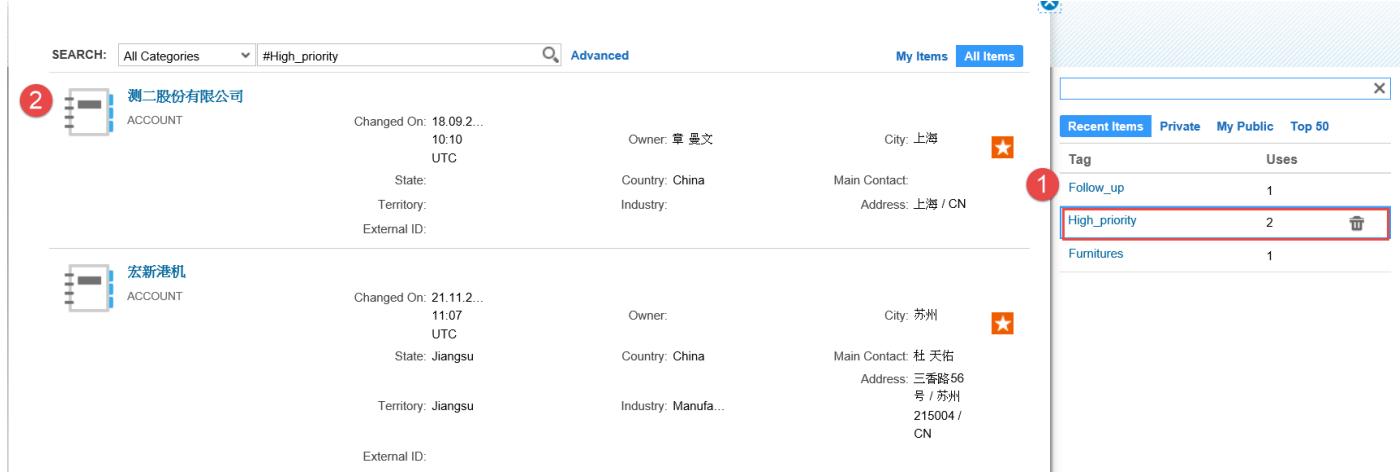
1 進入後，將顯示目前的標籤清單：



Tag	Uses
Follow_up	1
High_priority	2
Furnitures	1

1.1 Uses：表示含有該標籤的項目數量。

2 點選某一標籤，可顯示含有該標籤的項目清單：



Tag	Uses
Follow_up	1
High_priority	2
Furnitures	1

3 針對某一個項目，新增標籤的步驟：

3.1 開啟某一個項目，例如客戶：

ACCOUNT OVERVIEW FEED ACTIVITIES SALES TERRITORIES CONTACTS CAMPAIGNS LEADS SALE: < > ...

ACCOUNT TEAM			
Name	Account Role	Phone	E-Mail
李展鹏	Owner	+86 21 63751287	CNSalesMan@o...

ADDRESSES

Address	Phone	Fax	Main	Bill-To	Ship-To
江苏, 昆山 / CN			Yes	Yes (Automatic)	Yes (Automatic)

PANE HEADER

Document Type	Business Transaction Document ID	Subject
542 - Activity Task	22120	Llamada semanal calidad
542 - Activity Task	22119	Llamada semanal calidad
542 - Activity Task	22117	Llamada semanal calidad
542 - Activity Task	22108	Llamada semanal calidad
542 - Activity Task	22116	Nov Order

My Button

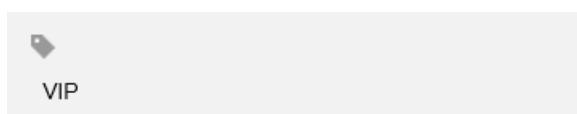
PANE HEADER

Document Type	Business Transaction Document ID	Subject
12 - Appointment	2915	New Product Demo
12 - Appointment	2921	首次拜访

3.2 按左邊視窗左下角 ，將出現一可供輸入標籤代號的欄位，所輸入的標籤不可有空白：



3.3 輸入後按 Enter，便已針對該項目增加了一標籤(同一項目，可以有多個標籤)：



3.4 在 TAGS 清單中，可查詢到所新增的標籤：

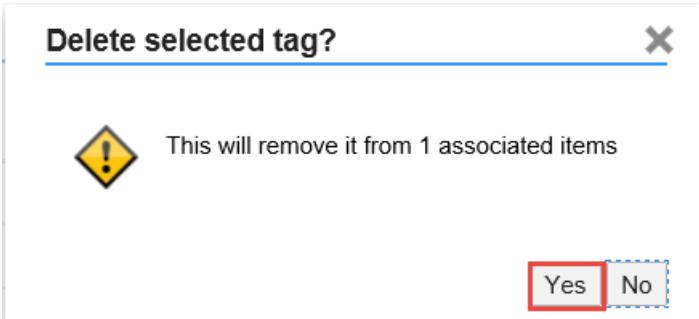
Recent Items Private My Public Top 50		
Tag	Uses	
VIP 	1	
Follow_up	1	
High_priority	2	
Furnitures	1	

4 刪除標籤的步驟：

4.1 點選 TAGS，先點選該標籤，再按 ：

Tag	Uses	
VIP	1	
Follow_up	1	
High_priority	2	
Furnitures	1	

4.2 出現警告訊息，按 **Yes** :



七、首頁

(一) 作業目的：

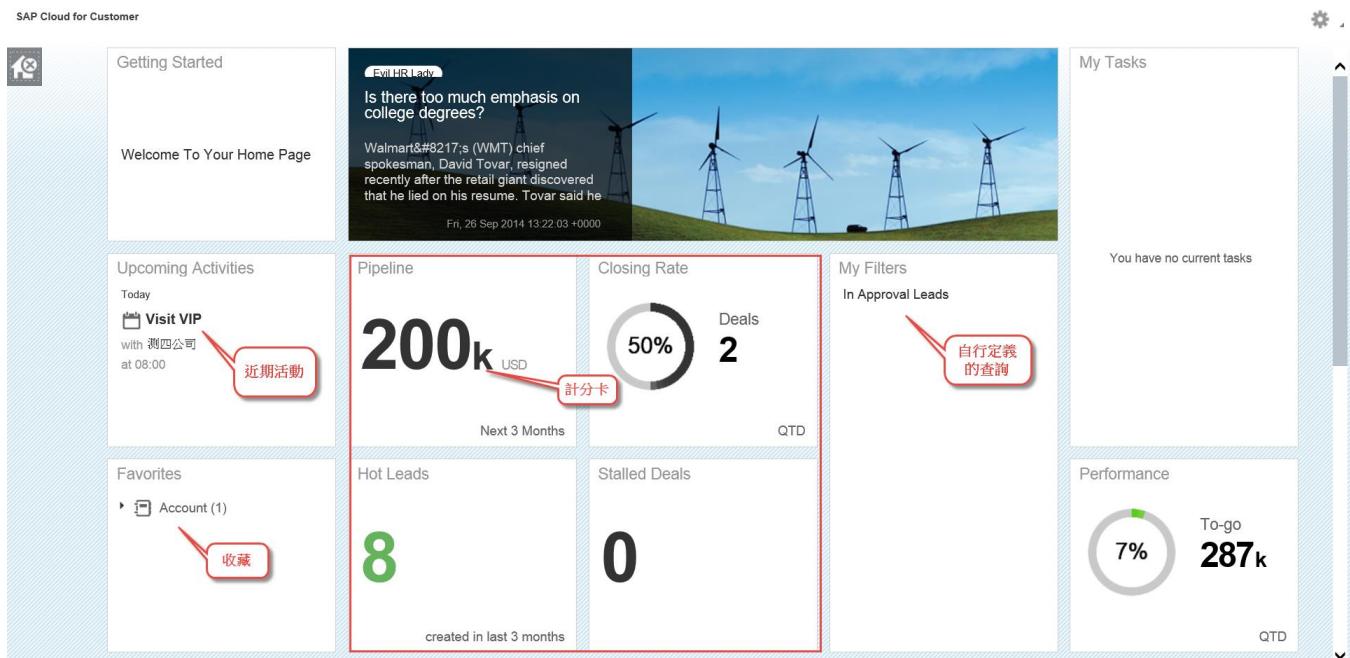
首頁是系統將與使用者重要相關資訊或捷徑，集中顯示在一個網頁上，以便利使用者快速獲取訊息及操作。首頁可作為登入後的第一個網頁，也可不是。首頁預設的內容乃管理者針對各角色所設定，但使用者可再作個人化調整。

(二) 存取方法：

路徑	功能列→ 
----	--

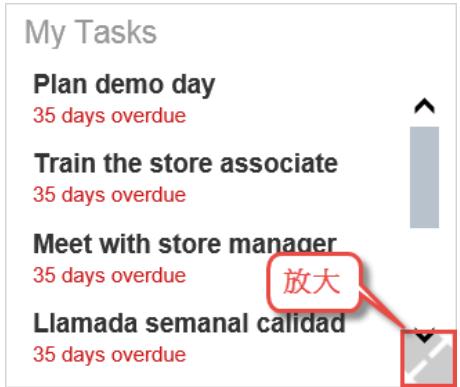
(三) 操作說明：

1 首頁範例如下，主要由各個圖塊組成：

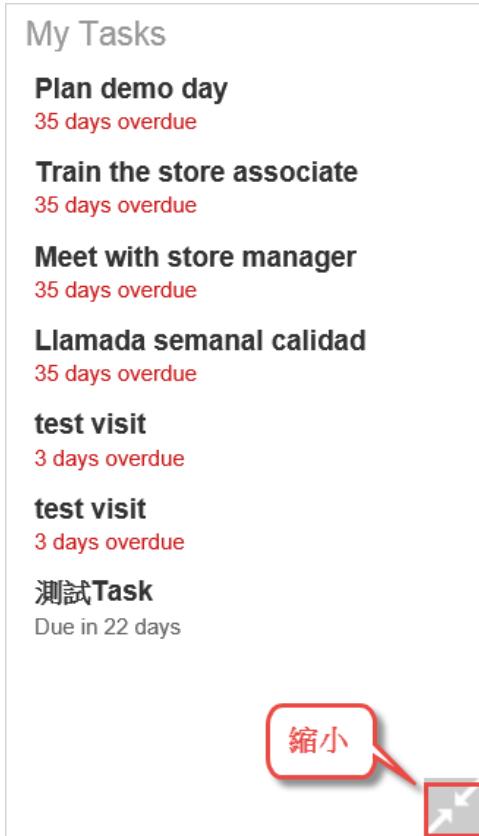


2 基本操作：

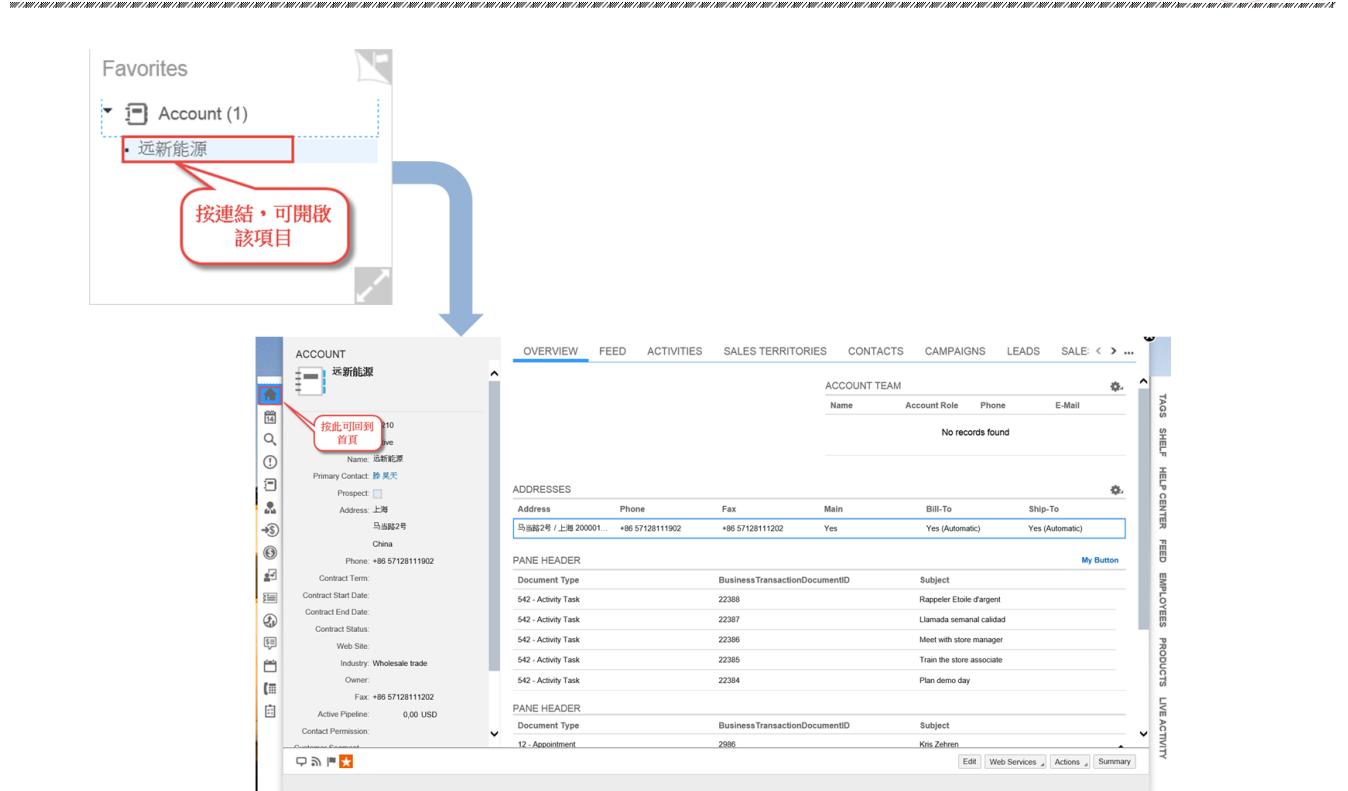
2.1 某些圖塊支援放大縮小，可按  (放大) 或  (縮小)：



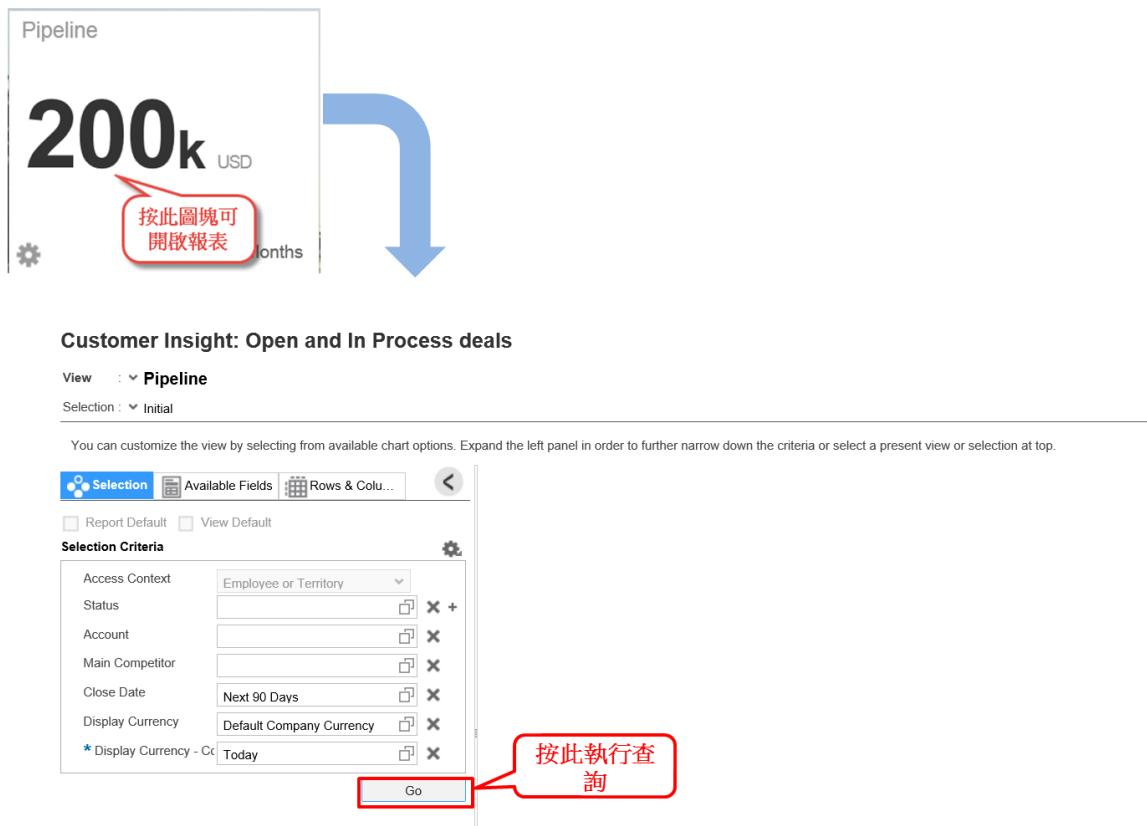
放大後的範例如下，可容納較多資料，可能無需捲軸：



2.2 在活動、任務、書架等圖塊內，按項目連結可開啟該項目：

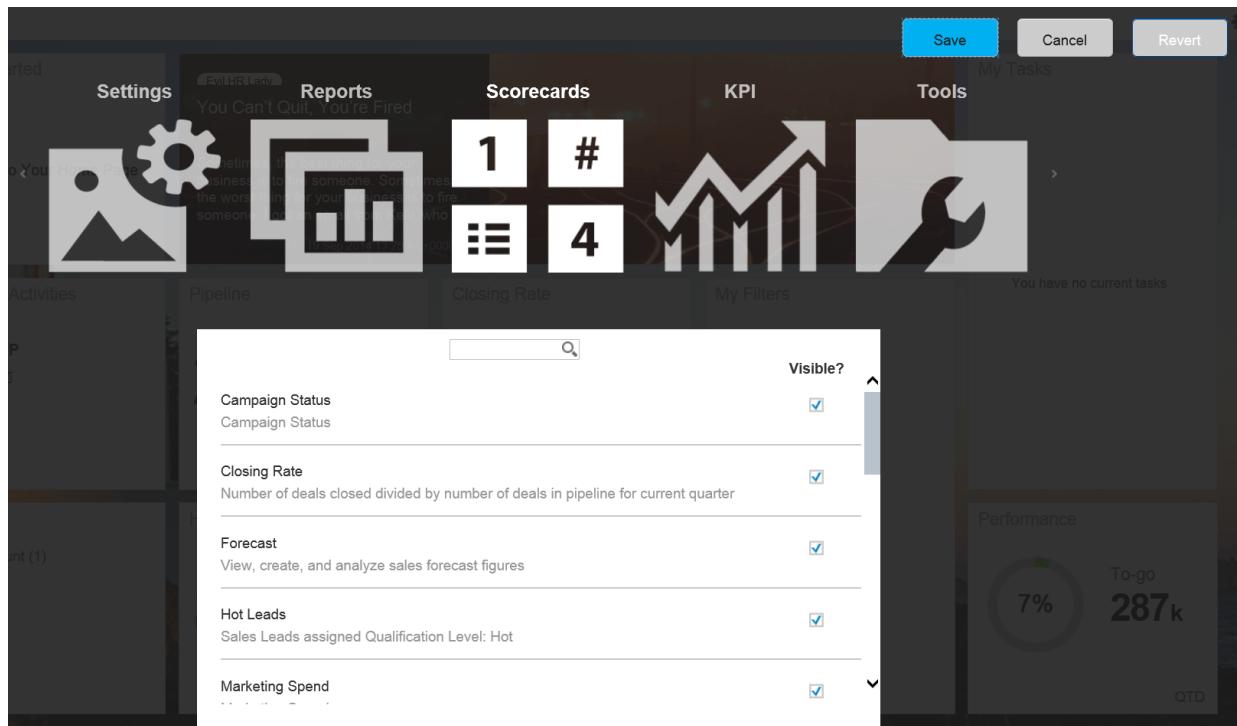


2.3 按計分卡圖塊，可查詢報表內容：



The screenshot shows a summary pipeline view with a large '200k USD' value and a 'months' label. A red box highlights this value, and a callout bubble says '按此圖塊可開啟報表' (Click this block to open the report). A large blue arrow points down to a detailed report configuration interface. The interface has a title 'Customer Insight: Open and In Process deals'. It includes a 'View' dropdown set to 'Pipeline', a 'Selection' dropdown set to 'Initial', and a note about customizing the view. Below these are sections for 'Selection Criteria' and 'Report Default' settings. A red box highlights the 'Go' button at the bottom of the selection criteria panel, with a callout bubble saying '按此執行查詢' (Click to execute query).

3 欲調整首頁個人化設定，可按 ，選 Personalize：



3.1 Scorecards(計分卡): 可設定各計分卡是否顯示。Visible(是否可見)勾選取消，則不顯示：

	Visible?
Campaign Status	<input checked="" type="checkbox"/>
Closing Rate	<input checked="" type="checkbox"/>
Forecast	<input checked="" type="checkbox"/>
Hot Leads	<input checked="" type="checkbox"/>
Marketing Spend	<input checked="" type="checkbox"/>

3.2 Settings(設置)：設定顯示的屬性：

Columns

How many columns? 3 4 5 6 7 [Adjust to fit](#)

Auto Refresh

After how many minutes? 0 - No auto refresh ▾

Default to Home Page

Set Home Page as landing page?

- No
 Yes

3.2.1 Columns(列數)：顯示幾欄。Adjust to fit-自動調整。

3.2.2 Set Home Page as landing page?：登入後是否以首頁為第一個網頁。

3.3 Reports：可設定各報表是否顯示在首頁。Visible(是否可見)勾選取消，則不顯示：



Visible?

Leads per Distributor 2



Sales Target vs. Pipeline - Current Year (Expected Rev.)

Shows the comparison of targets with opportunities and a projection based on opportunities for all employees. By default, the year-to-date net values for the current year are displayed.



3.4 Tools(工具)：設定訊息源、任務、書架及近期活動等是否顯示在首頁。Visible(是否可見)勾選取消，則不顯示：



Visible?

Feed

Shows recent updates from the sources you follow



Getting Started

Shows how-to videos and other help resources



My Filters

Shows a list of your saved queries



My Tasks

Shows a list of your current tasks



News



八、與 MS Outlook 整合

(一) 作業目的：

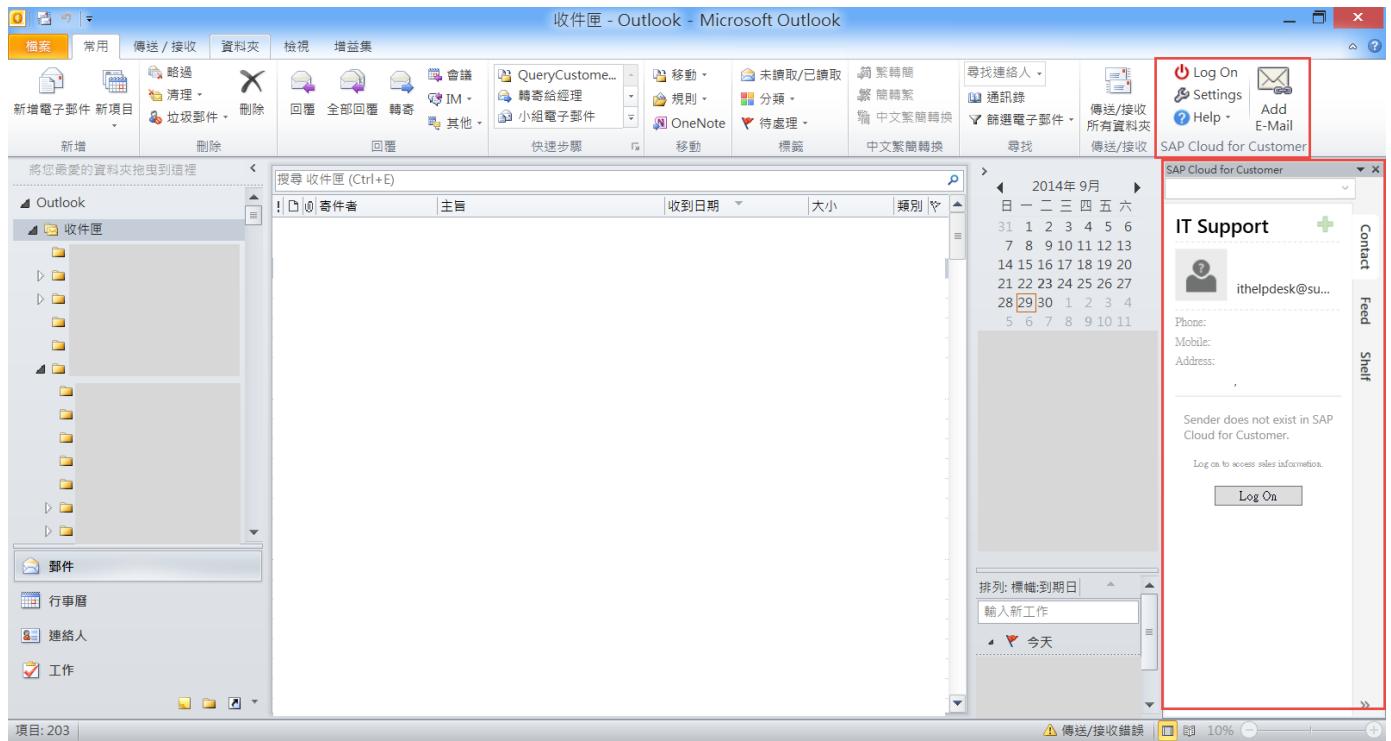
使 MS Outlook 與 Cloud for Customer 整合，同步客戶、聯絡人、任務及預約等資料。

(二) 存取方法：

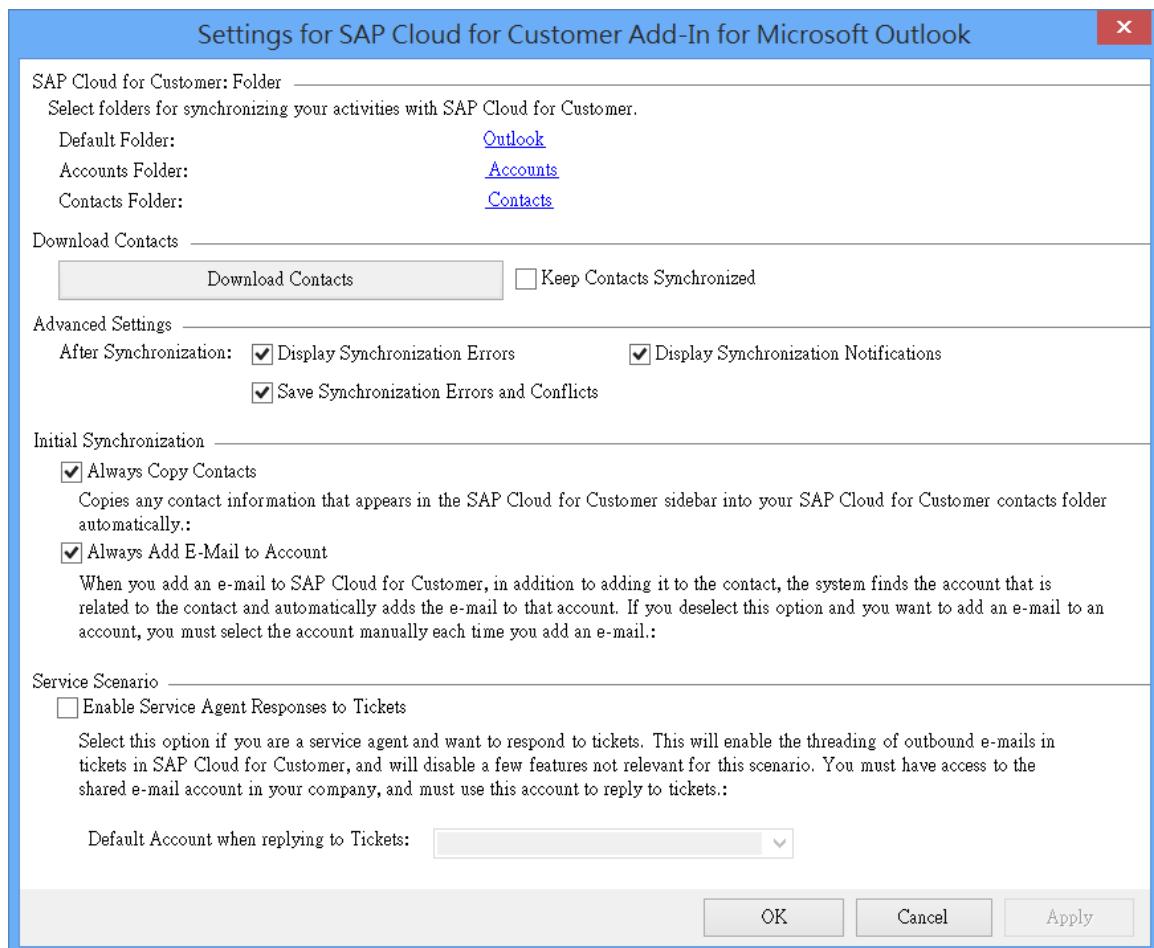
路徑	Windows 桌面→Micorsoft Outlook
----	------------------------------

(三) 操作說明：

- 必需先安裝 Cloud for Customer Add-In for Microsoft Outlook®。安裝後，重新進入 Outlook，工具列上會有針對 C4C 的按鈕：

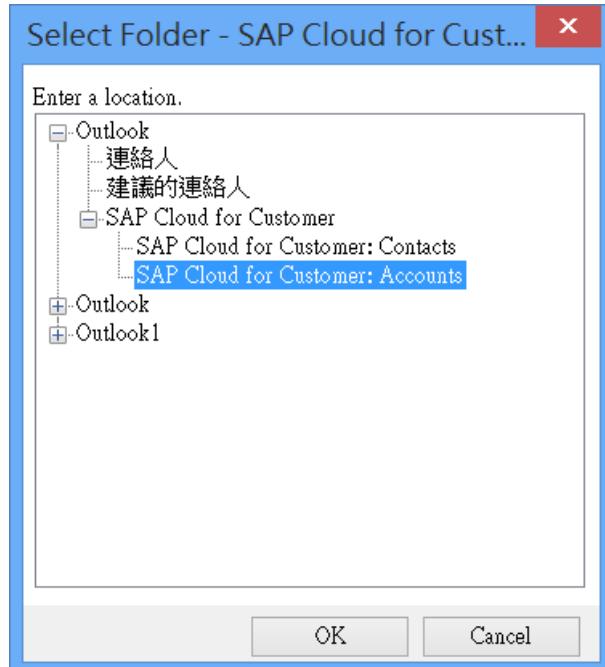


- 使用前，先設定，按  Settings，畫面顯示如下：



2.1 Default Folder : 預設的資料夾。

2.2 Accounts Folder 及 Contacts Folder : 存放客戶及聯絡人的資料夾，：

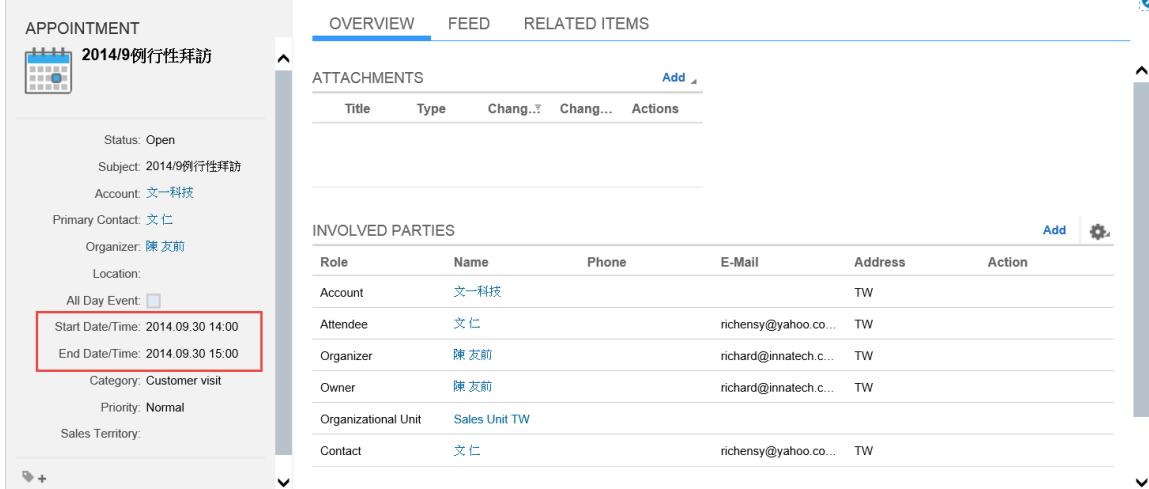


3 欲同步時，需先登入，按  Log On :

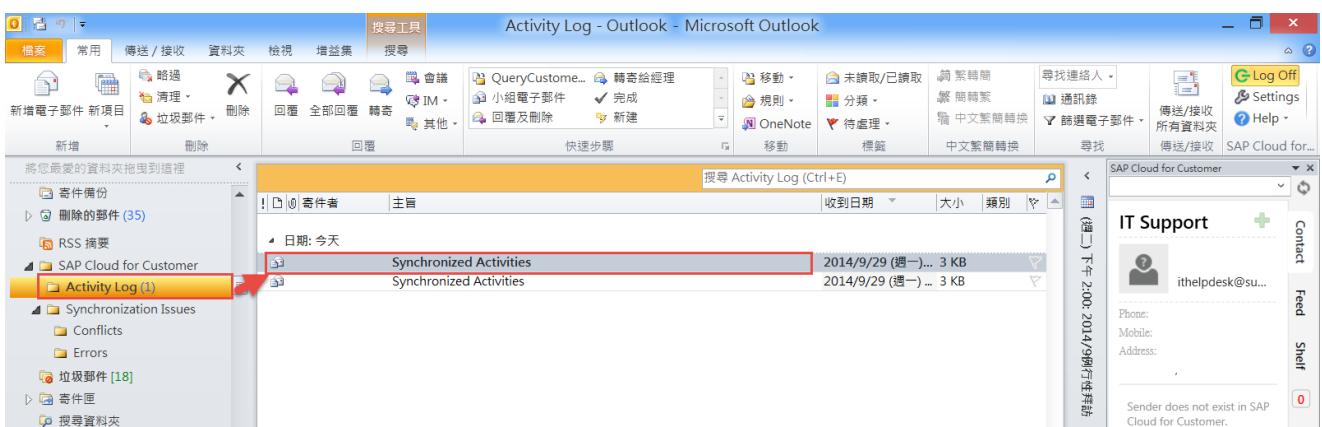


- 3.1 SAP System URL：指 C4C 的網址。首次登入時，必需輸入，之後即會帶出前次的值。
- 4 在 C4C 新增活動，可同步更新至 Outlook：

4.1 例如在 C4C 新增一預約：



4.2 登入後，如有同步更新，將會記錄在 Activity Log 子資料夾中：



4.3 開啟 Log 中的 Synchronized Activities，可得知同步的項目：



The following activities were synchronized:

Sync Time : 2014/9/29 下午 10:07:23

Activity : ContactAndAccount

Title : 文仁

Operation : Track

Synchronization Direction : Outbound

Sync Time : 2014/9/29 下午 10:07:45

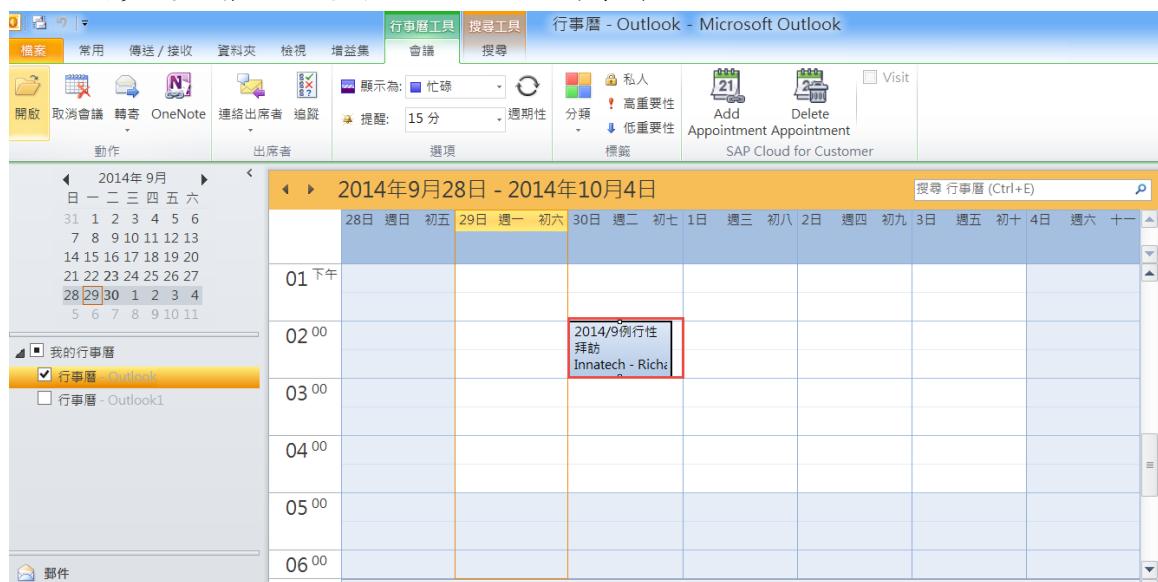
Activity : Appointment

Title : 2014/9例行性拜訪

Operation : Track

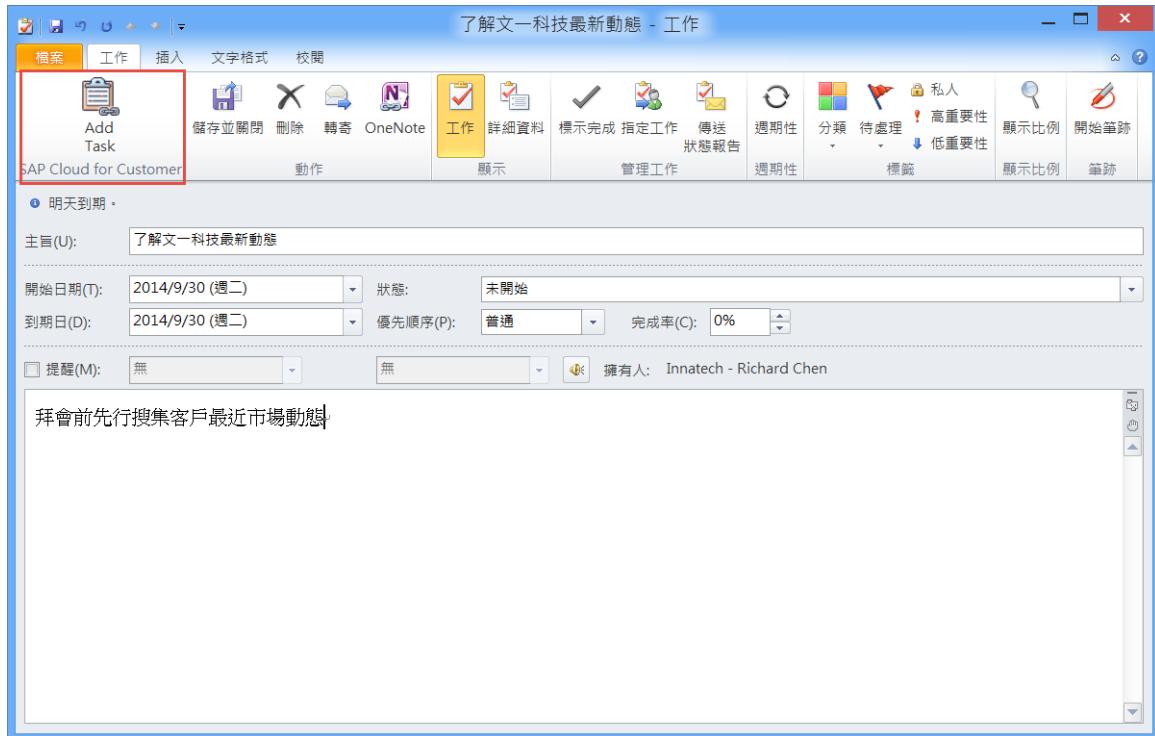
Synchronization Direction : Outbound

4.4 同步後，會自動更新至 Outlook 的行事曆：



5 在 Outlook 新增項目，同步至 C4C :

5.1 例如在 Outlook 新增一工作：



5.2 按 **SAP Cloud for Customer**，顯示下面視窗，按 Submit：

Add Task - SAP Cloud for Customer

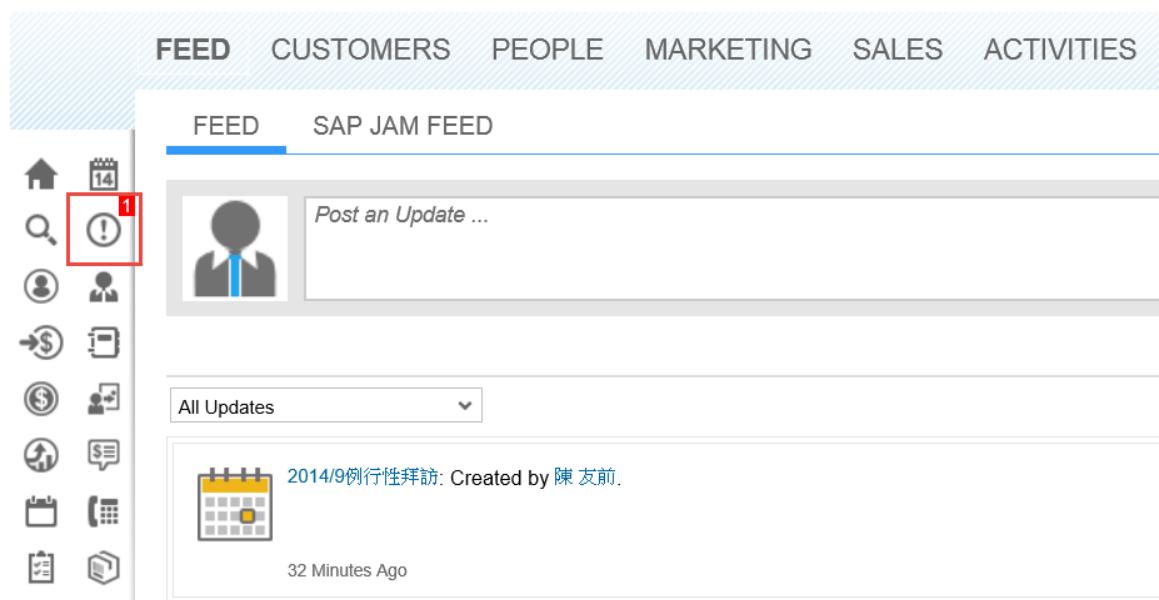
Selected Tasks		
Add Reference		
From	Subject	Referenced Account
Innatech - Richa...	了解文一科技最新動態	

Referenced Items		
Type	Document ID	Document Description

Submit **Cancel**

5.3 在 C4C，任務分派時，預設會有通知：

SAP Cloud for Customer



FEED CUSTOMERS PEOPLE MARKETING SALES ACTIVITIES

FEED SAP JAM FEED

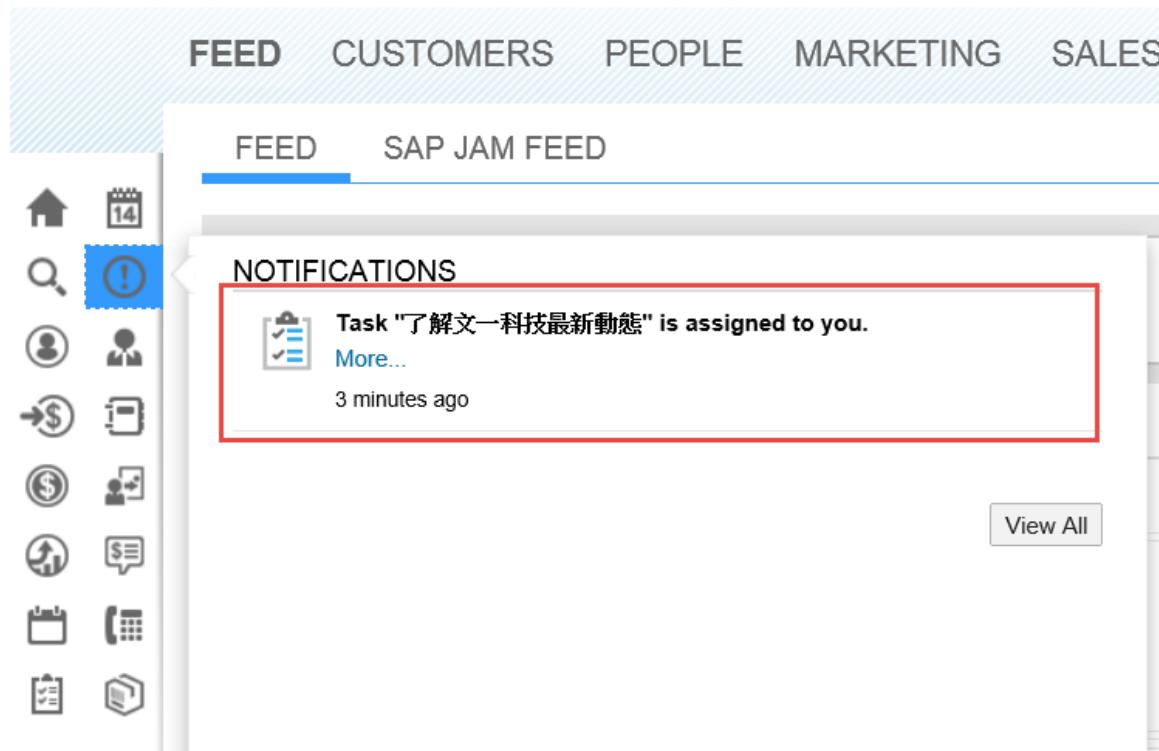
Post an Update ...

All Updates

2014/9例行性拜訪: Created by 陳友前.

32 Minutes Ago

5.4 按 ，顯示通知內容：



FEED CUSTOMERS PEOPLE MARKETING SALES

FEED SAP JAM FEED

NOTIFICATIONS

Task "了解文一科技最新動態" is assigned to you.
More...

3 minutes ago

View All

貳、客戶和聯絡人(BP-C4C-210)

一、客戶清單

(一) 作業目的：

查詢或維護客戶。客戶可能是正式的客戶或潛在客戶。

(二) 存取方法：

路徑	選單→CUSTOMERS(客戶)→ACCOUNTS(客戶)
----	-------------------------------

(三) 操作說明：

1 進入後，顯示所負責的客戶清單：

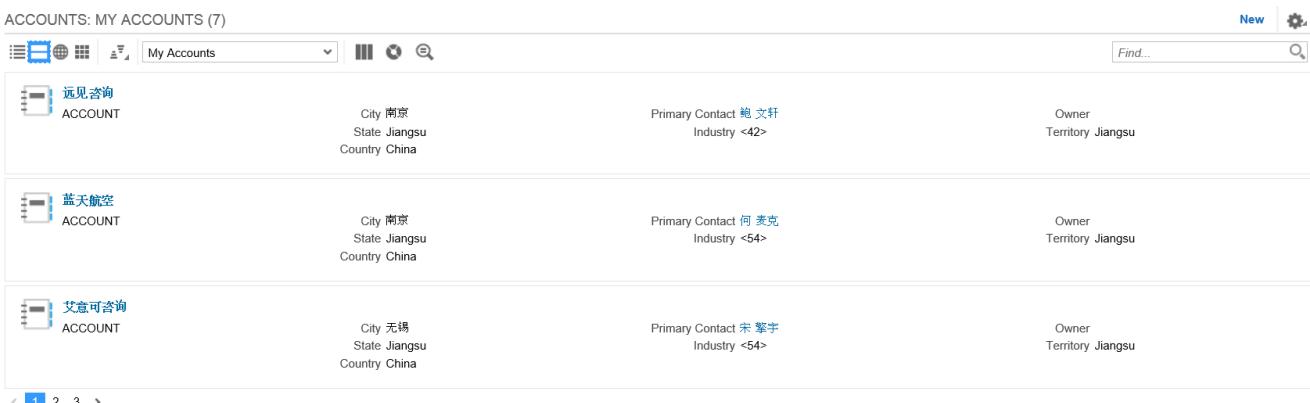
1.1  以清單方式顯示：



The screenshot shows a software interface for managing accounts. At the top, there are tabs for FEED, CUSTOMERS, PEOPLE, MARKETING, SALES, ACTIVITIES, ANALYSIS, COMPETITORS, PRODUCTS, LIBRARY, and ACTIVITY PLAN. The CUSTOMERS tab is selected. Below it, there are sub-tabs for ACCOUNTS and CONTACTS, with ACCOUNTS being the active one. A search bar with 'Find...' and a gear icon for settings are also present. The main area displays a table titled 'ACCOUNTS: MY ACCOUNTS (7)'. The columns are: Name, City, State, Country, Primary Contact, Owner, and Status. The data rows are:

Name	City	State	Country	Primary Contact	Owner	Status
远见咨询	南京	Jiangsu	China	鲍文轩		Active
蓝天航空	南京	Jiangsu	China	何麦克		Active
艾意可咨询	无锡	Jiangsu	China	宋擎宇		Active
维奥国际	苏州	Jiangsu	China	阮瑾瑜		Active
永远科技	昆山	Jiangsu	China		李晨鹏	Active
宏新港机	苏州	Jiangsu	China	杜天佑		Active
澳二股份有限公司	上海		China		章曼文	Active

1.2 ，則以卡片方式顯示：



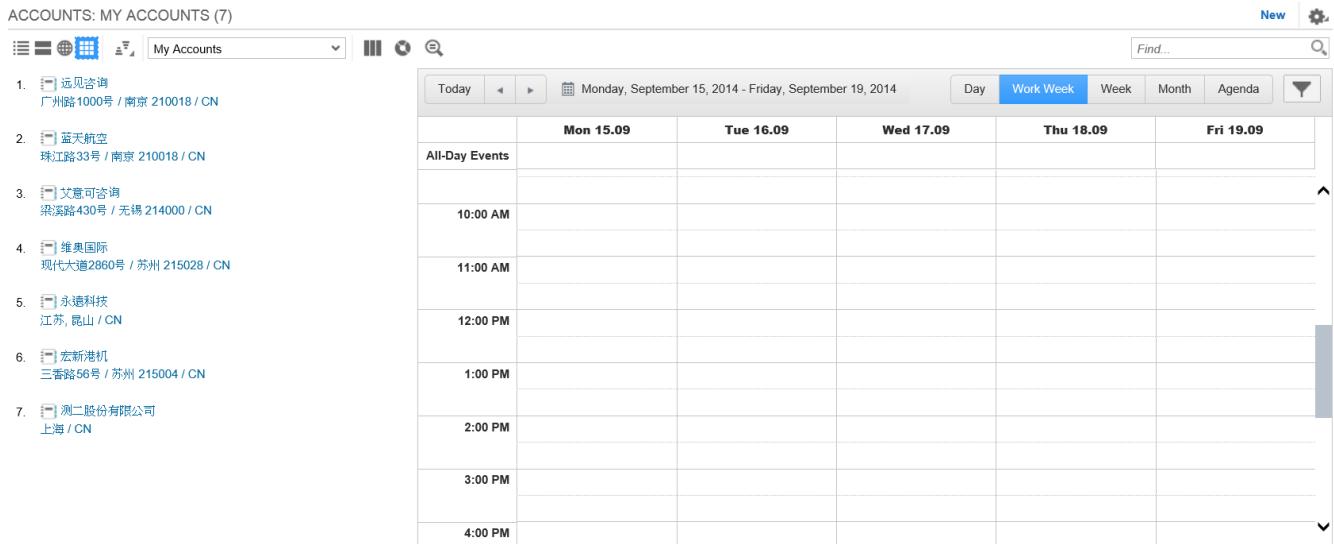
The screenshot shows the same software interface as above, but the ACCOUNTS sub-tab is selected, displaying accounts in a card format. Each card contains the account name, address details (City, State, Country), primary contact information, and ownership details. The cards for '远见咨询', '蓝天航空', and '艾意可咨询' are visible.

ACCOUNT	City	State	Country	Primary Contact	Industry	Owner	Territory
远见咨询	南京	Jiangsu	China	鲍文轩	<42>		Jiangsu
蓝天航空	南京	Jiangsu	China	何麦克	<54>		Jiangsu
艾意可咨询	无锡	Jiangsu	China	宋擎宇	<54>		Jiangsu

1.3 按 ，以簡易清單與地圖並列方式顯示。

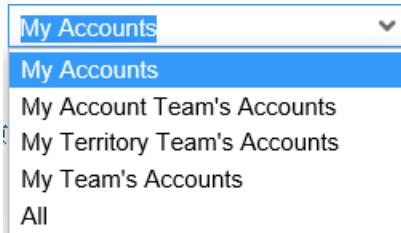
1.4 按 ，以簡易清單與日曆並列方式顯示；

ACCOUNTS: MY ACCOUNTS (7)



The screenshot shows the software's main interface. On the left, there is a sidebar titled "My Accounts" with options like "My Account Team's Accounts", "My Territory Team's Accounts", "My Team's Accounts", and "All". The main area displays a grid of account names and their details. On the right, there is a large calendar view for the week starting from Monday, September 15, 2014, to Friday, September 19, 2014. The calendar grid has columns for each day of the week and rows for time intervals from 10:00 AM to 4:00 PM.

2 可以篩選只顯示所負責的客戶、同組區域的客戶或所有客戶等：

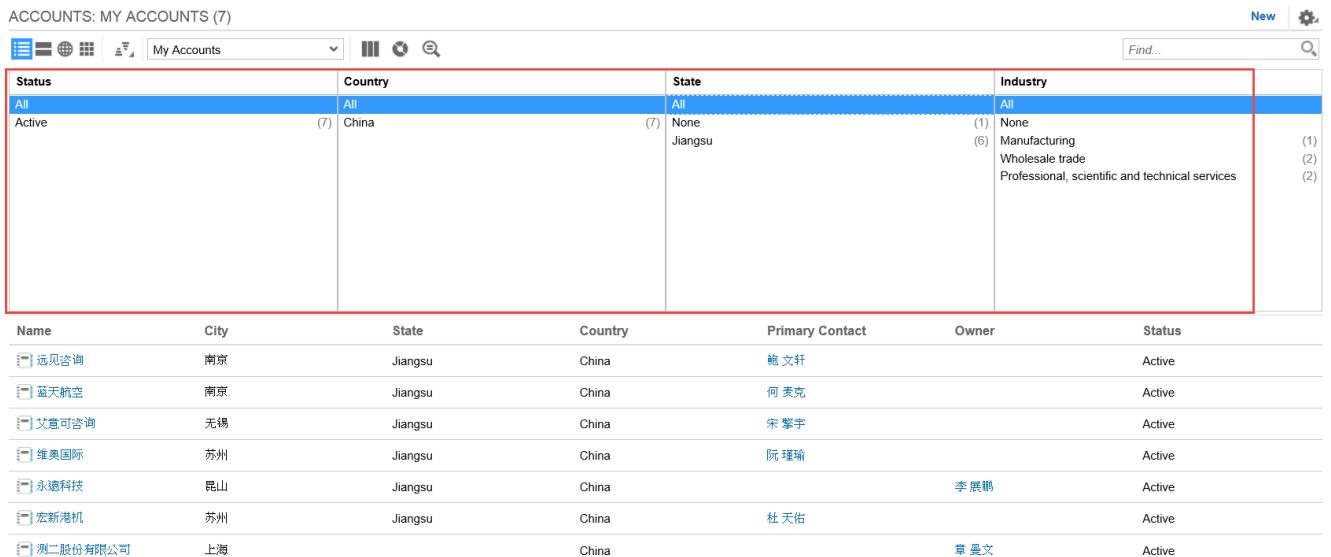


This is a screenshot of the "My Accounts" dropdown menu. It contains four items: "My Account Team's Accounts", "My Territory Team's Accounts", "My Team's Accounts", and "All". The "All" option is currently selected, indicated by a blue background.

3 按 ，可篩選客戶清單：

3.1 在畫面上方，顯示各欄位不同值的筆數：

ACCOUNTS: MY ACCOUNTS (7)



This screenshot shows a detailed grid view of accounts. The top row of the grid is highlighted with a red border and contains summary counts for different categories: Status (All, Active), Country (All, China), State (All, None, Jiangsu), and Industry (All, None, Manufacturing, Wholesale trade, Professional, scientific and technical services). Below this header row, there are seven individual account entries, each with columns for Name, City, State, Country, Primary Contact, Owner, and Status. The accounts listed are: 远见咨询 (南京, Jiangsu, China, 鲍文轩, 李晨鹏, Active); 蓝天航空 (南京, Jiangsu, China, 何麦克, 李晨鹏, Active); 艾意可咨询 (无锡, Jiangsu, China, 宋黎宇, 李晨鹏, Active); 维奥国际 (苏州, Jiangsu, China, 陈瑾瑜, 李晨鹏, Active); 永遠科技 (昆山, Jiangsu, China, 杜天佑, 章曼文, Active); 宏新港机 (苏州, Jiangsu, China, 陈瑾瑜, 李晨鹏, Active); and 测二股份有限公司 (上海, China, China, 章曼文, Active).

3.2 可在某一欄位點選某值，即可篩選清單，例如只顯示某一產業的客戶：

ACCOUNTS: MY ACCOUNTS (2)

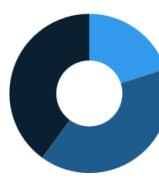
Status	Country	State	Industry
All Active	All (2) China	All (2) None Jiangsu	All None Manufacturing Wholesale trade Professional, scientific and technical services

下方表格显示筛选后的客户列表：

Name	City	State	Country	Primary Contact	Owner	Status
远见咨询	南京	Jiangsu	China	鲍文轩		Active
维奥国际	苏州	Jiangsu	China	阮瑾瑜		Active

4 按 ，可顯示客戶數量佔比的統計圖：

ACCOUNTS: MY ACCOUNTS (7)

Country			State			Industry		
								

下方表格显示所有客户列表：

Name	City	State	Country	Primary Contact	Owner	Status
远见咨询	南京	Jiangsu	China	鲍文轩		Active
蓝天航空	南京	Jiangsu	China	何麦克		Active
艾意可咨询	无锡	Jiangsu	China	宋擎宇		Active
维奥国际	苏州	Jiangsu	China	阮瑾瑜		Active
永逸科技	昆山	Jiangsu	China		李展鹏	Active
宏新港机	苏州	Jiangsu	China	杜天佑		Active
测二股份有限公司	上海		China		章曼文	Active

5 按 ，可定義進階篩選條件：

5.1 系統顯示可供篩選的欄位：

ACCOUNTS CONTACTS

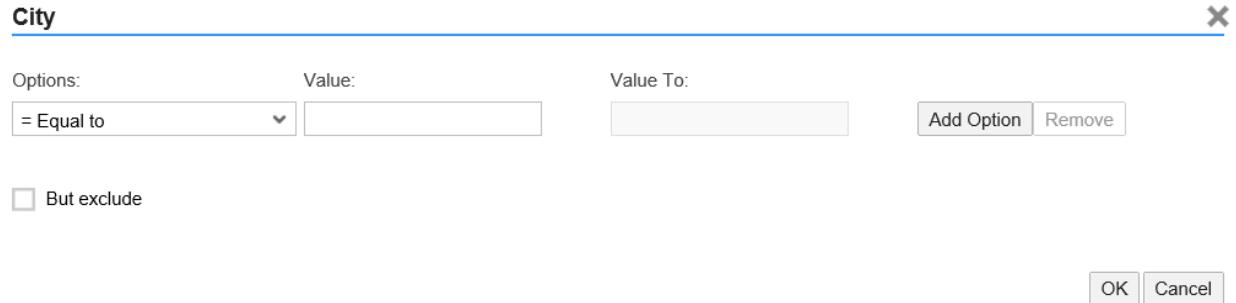
ACCOUNTS: MY ACCOUNTS (7)

Account ID:	Name:
Status: If=Obsolete;)	Country:
State:	City:
Postal Code:	Primary Contact:
ABC Classification:	Industry:
Owner:	Sales Organization:
Territory:	Division:
Distribution Channel:	

下方按钮：

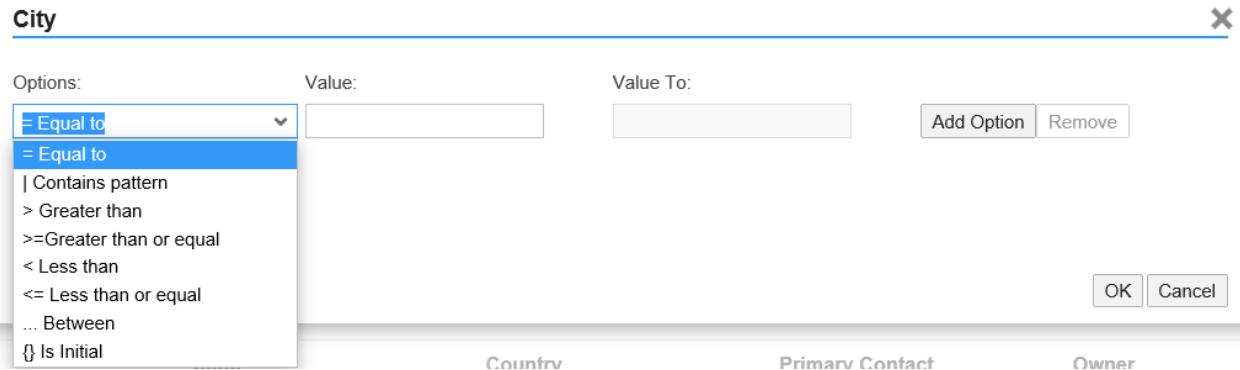
Go Reset Save Query Organize Queries

5.2 可直接在欄位中輸入條件值，或按欄位旁 ，可進一步指定篩選規則：



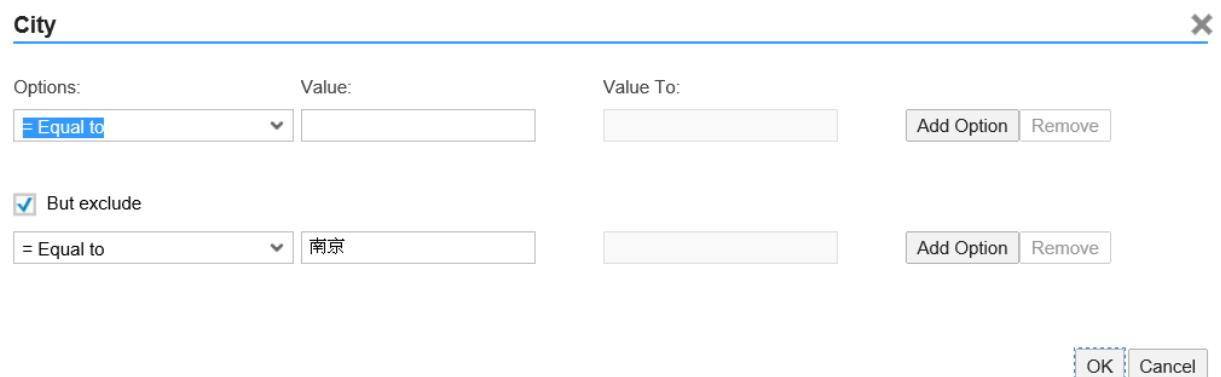
The screenshot shows the 'City' filter dialog. The 'Options:' dropdown is set to '= Equal to'. The 'Value:' field is empty. The 'Value To:' field is also empty. There are 'Add Option' and 'Remove' buttons. A checkbox labeled 'But exclude' is unchecked. At the bottom are 'OK' and 'Cancel' buttons.

5.2.1 可進一步指定篩選規則：



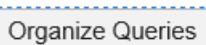
The screenshot shows the 'City' filter dialog with the 'Options:' dropdown open, displaying various comparison operators: '= Equal to', '= Equal to', '| Contains pattern', '> Greater than', '>=Greater than or equal', '< Less than', '<= Less than or equal', '... Between', and '{} Is Initial'. The '= Equal to' option is currently selected. The 'Value:' and 'Value To:' fields are empty. There are 'Add Option' and 'Remove' buttons. A checkbox labeled 'But exclude' is unchecked. At the bottom are 'OK' and 'Cancel' buttons.

5.2.2 勾選  But exclude ，可排除所指定的條件：



The screenshot shows the 'City' filter dialog with the 'But exclude' checkbox checked. The 'Value:' field contains '南京'. The 'Value To:' field is empty. There are 'Add Option' and 'Remove' buttons. A checkbox labeled 'But exclude' is checked. At the bottom are 'OK' and 'Cancel' buttons.

5.3 按 ，執行所輸入篩選條件的查詢；按 ，可清除所輸入的篩選條件。

5.4 按 ，可切換篩選客戶的範圍：

Organize Queries

Default	Name	Remove
<input type="radio"/>	My Accounts	
<input checked="" type="radio"/>	My Account Team's Accounts	
<input type="radio"/>	My Territory Team's Accounts	
<input type="radio"/>	My Team's Accounts	
<input type="radio"/>	All	

5.5 按 **Save Query**，可儲存所輸入篩選條件：

5.5.1 輸入儲存的名稱：

Add Query

New Query Name:	<input type="text" value="My Accounts Excl. 南京"/>
Set As Default:	<input type="checkbox"/>
<input type="button" value="Apply"/> <input type="button" value="Cancel"/>	

5.5.2 儲存後，在下拉篩選清單即會增加此選項：



二、建立客戶

(一) 作業目的：

建立新客戶的基本資料。客戶可能是正式客戶或潛在客戶。

(二) 存取方法：

路徑	選單→CUSTOMERS(客戶)→ACCOUNTS(客戶) 或 工具列→
----	---

(三) 操作說明：

1 進入後，顯示畫面如下：

NEW ACCOUNT

* Name:	<input type="text"/>
Prospect:	<input checked="" type="checkbox"/>
Parent Account:	<input type="text"/> 
Web Site:	<input type="text"/>
ABC Classification:	<input type="text"/> 
* Country:	<input type="text"/> CN - China 
City:	<input type="text"/>
State:	<input type="text"/> 
Street:	<input type="text"/>
Owner:	<input type="text"/> 
Customer Note:	<input type="text"/>
<input type="button" value="Check for Duplicates"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/>	

2 按 **Check for Duplicates**，會檢核是否已有類似客戶(根據設定檢核，例如：同一國家、州及街道，是否有類似的客戶名稱)，以防重覆建檔：

2.1 如有類似的客戶名稱，將會顯示類似客戶的清單：

NEW ACCOUNT

* Name: 测四公司

Prospect:

Parent Account:

Web Site:

ABC Classification:

* Country: CN - China

City: 上海

State:

Street:

Owner:

Customer Note:

ZTest:

DUPLICATE CHECK RESULTS

Account	Address
测三公司	龙阳路303号 / 上海 / CN

Name:

Account ID:

Address:

2.2 如果城市或街道不同，或名稱沒有類似，右邊清單將會是空的：

NEW ACCOUNT

* Name: 测四公司

Prospect:

Parent Account:

Web Site:

ABC Classification:

* Country: CN - China

City: 上海

State:

Street: 龙阳路310号

Owner:

Customer Note:

ZTest:

DUPLICATE CHECK RESULTS

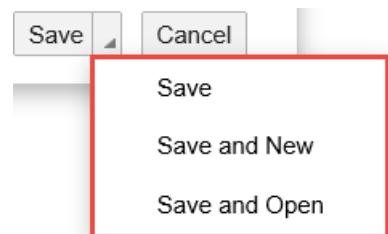
Account	Address
No records found	

Name:

Account ID:

Address:

3 有三種存檔方式：



- 3.1 Save : 存檔後回到原畫面。
- 3.2 Save and New : 存檔後留在原新增畫面，可供建立第二筆新客戶。
- 3.3 Save and Open : 存檔後開啟所建立的客戶。

三、維護客戶

(一) 作業目的：

修改或作廢現有客戶資料。

(二) 存取方法：

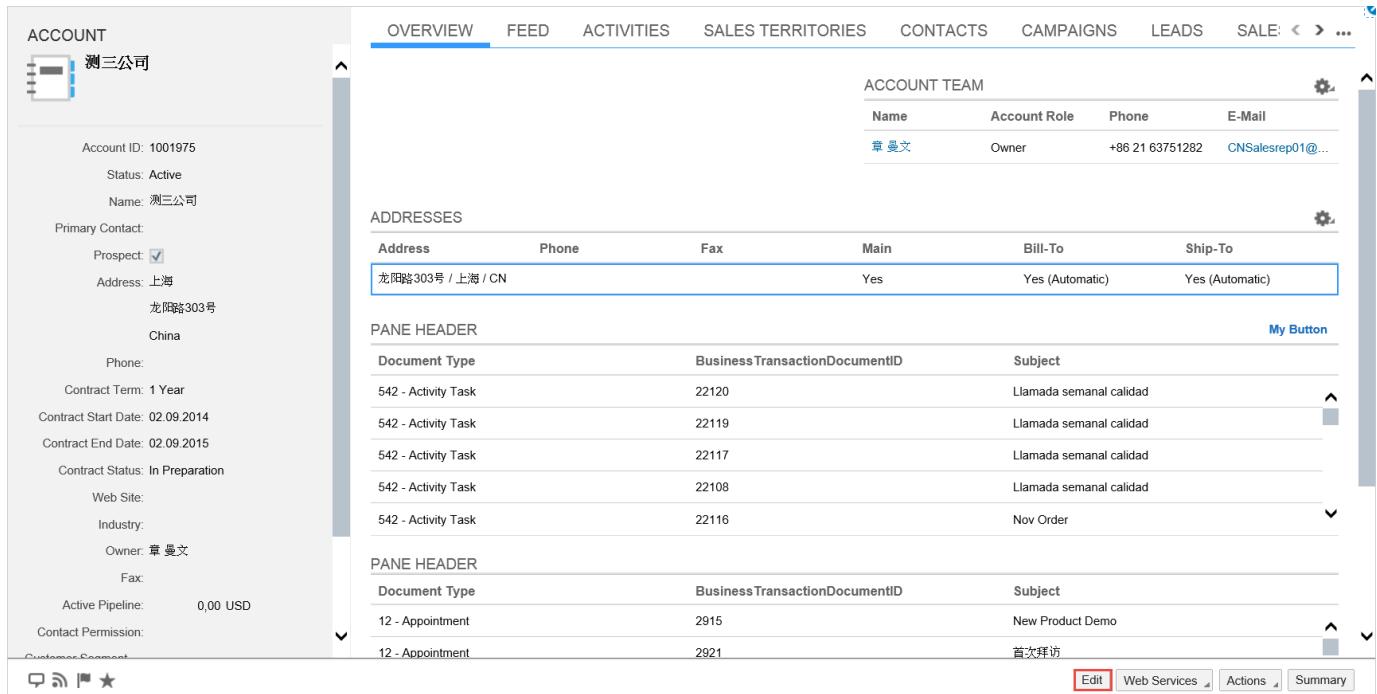
路徑	選單→CUSTOMERS(客戶)→ACCOUNTS(客戶)
----	-------------------------------

(三) 操作說明：

1 在下面清單中，點選某一筆客戶名稱：

ACCOUNTS CONTACTS						
ACCOUNTS: MY ACCOUNTS (9)						
Name	City	State	Country	Primary Contact	Owner	Status
预见咨询	南京	Jiangsu	China	鲍文轩		Active
蓝天航空	南京	Jiangsu	China	何麦克		Active
艾意可咨询	无锡	Jiangsu	China	宋擎宇		Active
维奥国际	苏州	Jiangsu	China	阮瑾瑜		Active
永遠科技	昆山	Jiangsu	China		李展鹏	Active
宏新港机	苏州	Jiangsu	China	杜天佑		Active
测三公司	上海		China		章曼文	Active
测二股份有限公司	上海		China		章曼文	Active
测五公司	上海	Shanghai	China		章曼文	Active

2 開啟客戶資料後，按右下角  :



The screenshot shows the SAP CRM interface for managing accounts. The main view displays the 'OVERVIEW' tab for the account '测三公司'. On the left, there's a sidebar with basic account information: Account ID (1001975), Status (Active), Name (测三公司), Primary Contact (checked), Address (龙阳路303号 / 上海 / CN), Phone, Contract Term (1 Year), Contract Start Date (02.09.2014), Contract End Date (02.09.2015), Contract Status (In Preparation), Web Site, Industry, Owner (章曼文), Fax, Active Pipeline (0,00 USD), and Contact Permission.

The right side of the screen contains several panes:

- ACCOUNT TEAM:** Shows the owner, account role, phone, and e-mail for章曼文 (Owner).
- ADDRESSES:** Displays the address (龙阳路303号 / 上海 / CN) and indicates it is the Main address.
- PANE HEADER:** A section containing a table with columns: Document Type, Business Transaction Document ID, and Subject. It lists activity tasks such as '542 - Activity Task' with IDs 22120, 22119, 22117, 22108, and 22116, and subjects like 'Llamada semanal calidad' and 'Nov Order'.
- PANE HEADER:** Another section with a table for document types, business transaction document IDs, and subjects, listing entries for '12 - Appointment' with IDs 2915 and 2921, and subject 'New Product Demo'.

At the bottom right, there are buttons for Edit, Web Services, Actions, and Summary.

3 欲凍結某一客戶時，開啟客戶資料後，應按 **Actions** 再選 **Block**。

3.1 凍結後，狀態會變成 Blocked：

ACCOUNT



测三公司

Account ID: 1001975

Status: **Blocked**

Name: 测三公司

Primary Contact:

Prospect:

Address: 上海

龙阳路303号

China

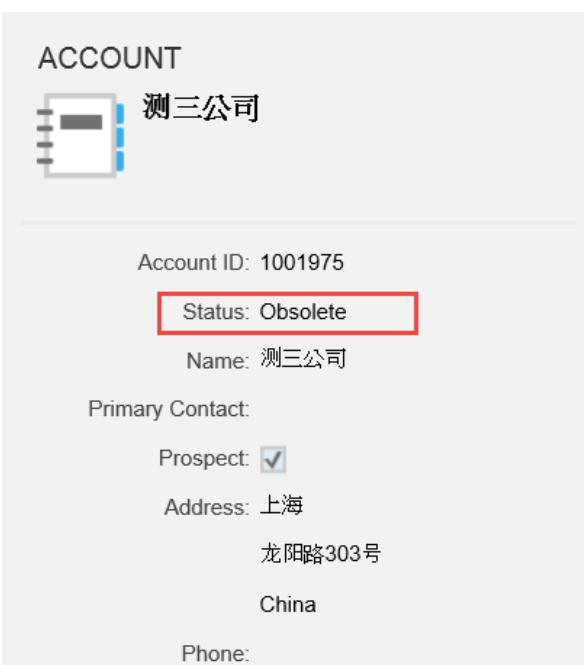
3.2 已凍結的客戶，將無法針對該客戶建立機會或其他活動。

3.3 欲解除被凍結的客戶，需按 **Actions**，再選 **Set as Active**。

4 欲作廢某一客戶時，開啟客戶資料後，應按 **Actions** 再選 **Set as Obsolete**。

4.1 作廢後，狀態將會變成 Obsolete：

ACCOUNT



测三公司

Account ID: 1001975

Status: **Obsolete**

Name: 测三公司

Primary Contact:

Prospect:

Address: 上海

龙阳路303号

China

Phone:

4.2 已作廢的客戶，將無法針對該客戶建立機會或其他活動。

4.3 欲解除被作廢的客戶，應按 **Actions** ，再選 **Set as Active** 。

4.4 已作廢的客戶，預設不會顯示在客戶清單中。如果欲顯示，需按  ，修改篩選條件，將 Status 的條件清除：

4.4.1 先按 Status 旁  :

ACCOUNTS: MY ACCOUNTS (8)

Account ID:	Name:
Status: 	Country:
State:	City:
Postal Code:	Primary Contact:
ABC Classification:	Industry:
Owner:	Sales Organization:
Territory:	Division:
Distribution Channel:	

Go **Reset** **Save Query** **Organize Queries**

4.4.2 進入 Status 篩選規則畫面後，取消 Status 的排除條件：

Status

Options:	Value:	Value To:
= Equal to	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/> But exclude	取消此勾選	
= Equal to	Obsolete	<input type="text"/>

OK **Cancel**

4.4.3 回進階篩選條件畫面，再按 **Go** ，即會顯示包含已作廢的客戶。

四、連絡人清單

(一) 作業目的：

查詢或維護客戶的聯絡人。。

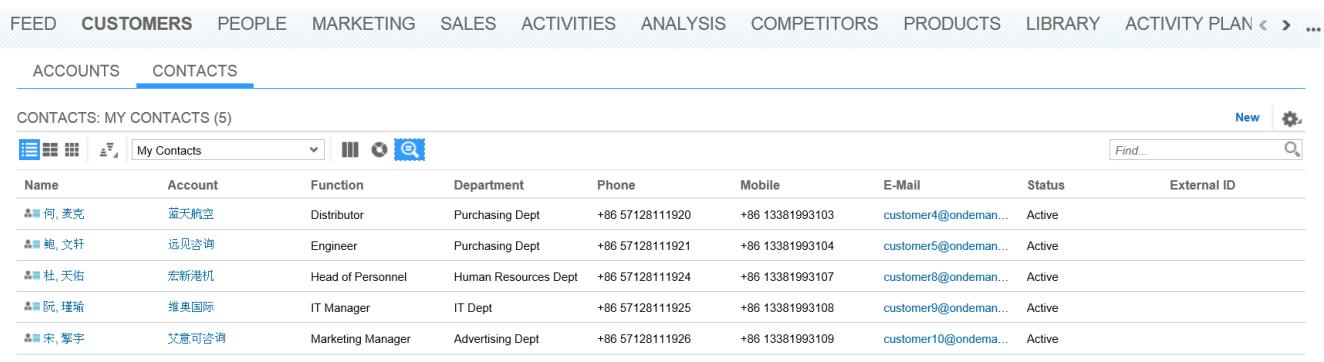
(二) 存取方法：

路徑	工具列→CUSTOMERS(客戶)→CONTACTS(連絡人)
----	---------------------------------

(三) 操作說明：

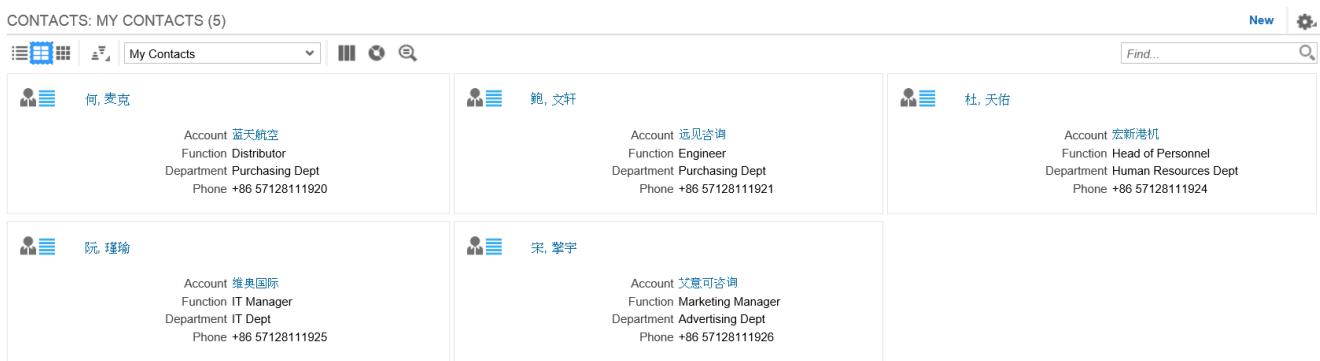
1 進入後，顯示所負責的客戶清單：

1.1 以清單方式顯示：



Name	Account	Function	Department	Phone	Mobile	E-Mail	Status	External ID
何, 麥克	藍天航空	Distributor	Purchasing Dept	+86 57128111920	+86 13381993103	customer4@ondeman...	Active	
鮑, 文軒	遠見諮詢	Engineer	Purchasing Dept	+86 57128111921	+86 13381993104	customer5@ondeman...	Active	
杜, 天佑	宏新港机	Head of Personnel	Human Resources Dept	+86 57128111924	+86 13381993107	customer8@ondeman...	Active	
院, 瑾瑜	維奧國際	IT Manager	IT Dept	+86 57128111925	+86 13381993108	customer9@ondeman...	Active	
宋, 鋒宇	艾意可諮詢	Marketing Manager	Advertising Dept	+86 57128111926	+86 13381993109	customer10@ondema...	Active	

1.2 按 ，則以塊狀方式顯示：



 何, 麥克

Account 藍天航空
Function Distributor
Department Purchasing Dept
Phone +86 57128111920

 鮑, 文軒

Account 遠見諮詢
Function Engineer
Department Purchasing Dept
Phone +86 57128111921

 杜, 天佑

Account 宏新港机
Function Head of Personnel
Department Human Resources Dept
Phone +86 57128111924

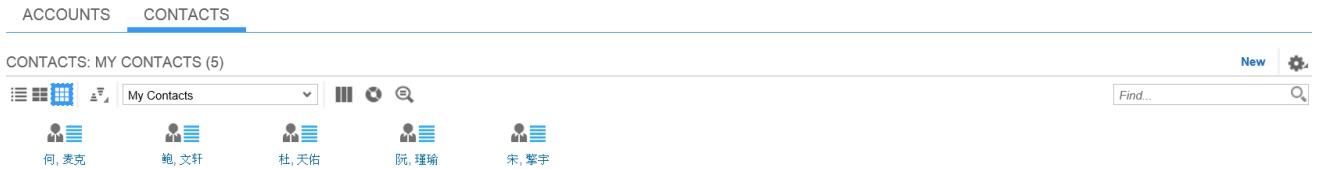
 院, 瑾瑜

Account 維奧國際
Function IT Manager
Department IT Dept
Phone +86 57128111925

 宋, 鋒宇

Account 艾意可諮詢
Function Marketing Manager
Department Advertising Dept
Phone +86 57128111926

1.3 按 ，以縮圖方式顯示：













2 可以篩選只顯示所負責的聯絡人、同部門的聯絡人或所有聯絡人等：

My Contacts

My Contacts

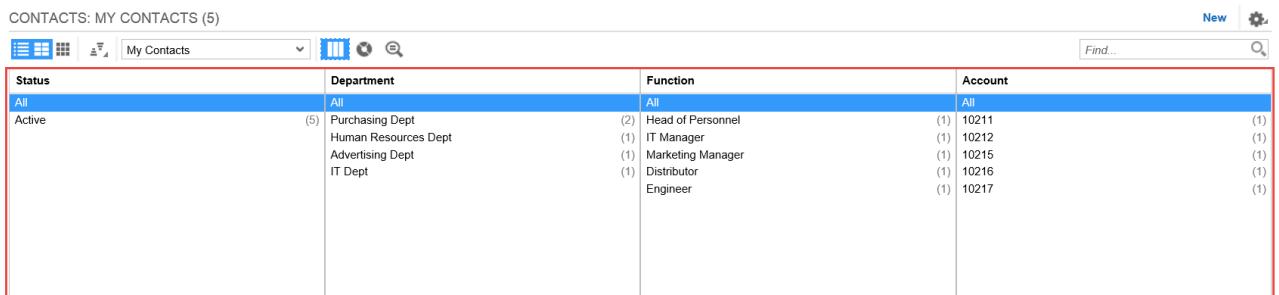
My Team's Contacts

All

3 按 ，可篩選聯絡人清單：

3.1 在畫面上方，顯示各欄位不同值的筆數：

CONTACTS: MY CONTACTS (5)

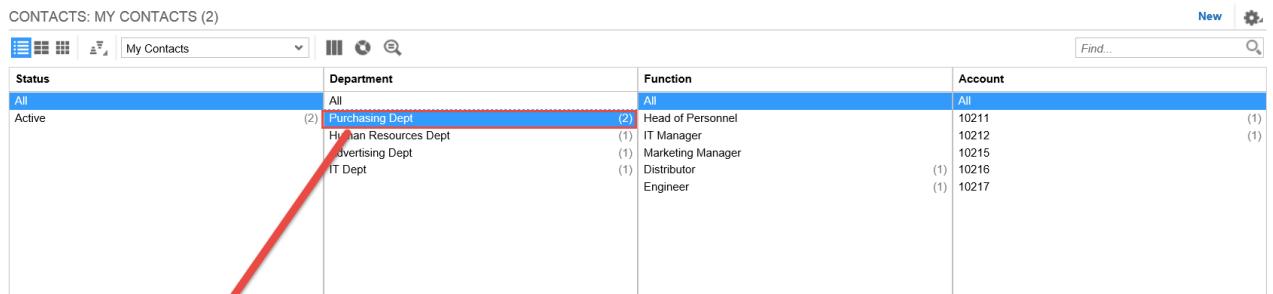


Status	Department	Function	Account
All	All	All	All
Active	(5) Purchasing Dept Human Resources Dept Advertising Dept IT Dept	(2) Head of Personnel IT Manager (1) Marketing Manager (1) Distributor Engineer	(1) 10211 (1) 10212 (1) 10215 (1) 10216 (1) 10217
Inactive			
Deleted			

Name	Account	Function	Department	Phone	Mobile	E-Mail	Status	External ID
■ 何, 麦克	蓝天航空	Distributor	Purchasing Dept	+86 57128111920	+86 13381993103	customer4@ondeman...	Active	
■ 鲍, 文轩	远见咨询	Engineer	Purchasing Dept	+86 57128111921	+86 13381993104	customer5@ondeman...	Active	
■ 杜, 天佑	宏新港机	Head of Personnel	Human Resources Dept	+86 57128111924	+86 13381993107	customer8@ondeman...	Active	
■ 阮, 瑞瑜	维奥国际	IT Manager	IT Dept	+86 57128111925	+86 13381993108	customer9@ondeman...	Active	
■ 宋, 钟宇	艾意可咨询	Marketing Manager	Advertising Dept	+86 57128111926	+86 13381993109	customer10@ondema...	Active	

3.2 可在某一欄位點選某值，即可篩選清單，例如只顯示某一部門的聯絡人：

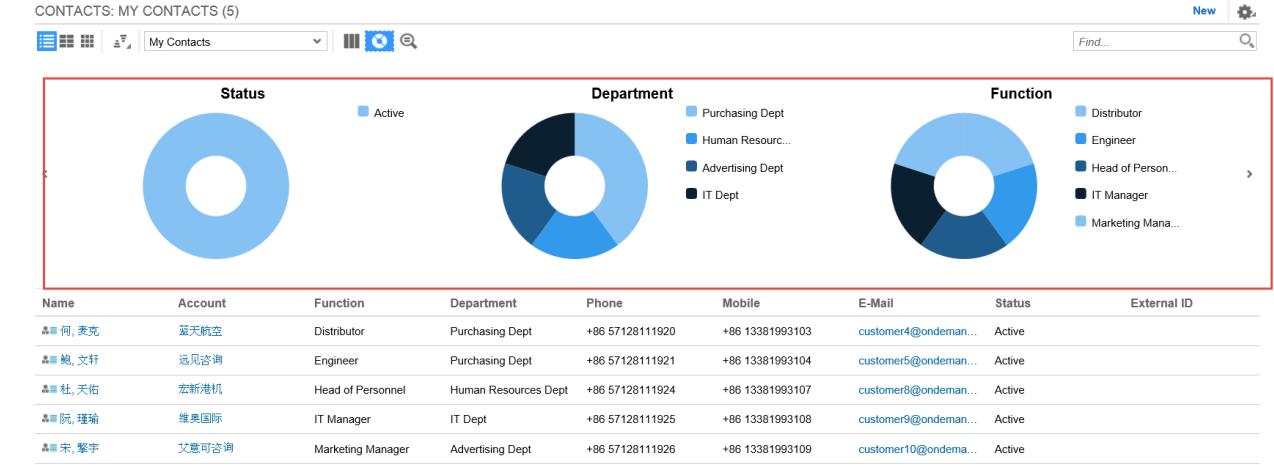
CONTACTS: MY CONTACTS (2)



Status	Department	Function	Account
All	All	All	All
Active	(2) Purchasing Dept	(2) Head of Personnel IT Manager (1) Marketing Manager (1) Distributor Engineer	(1) 10211 10212 10215 (1) 10216 (1) 10217
Inactive			
Deleted			

Name	Account	Function	Department	Phone	Mobile	E-Mail	Status	External ID
■ 何, 麦克	蓝天航空	Distributor	Purchasing Dept	+86 57128111920	+86 13381993103	customer4@ondeman...	Active	
■ 鲍, 文轩	远见咨询	Engineer	Purchasing Dept	+86 57128111921	+86 13381993104	customer5@ondeman...	Active	

4 按 ，可顯示聯絡人數量佔比的統計圖：



5 按 ，可定義進階篩選條件：

5.1 系統顯示可供篩選的欄位：

CONTACTS: MY CONTACTS (5)

New | 

Find... 

Contact ID:	<input type="text"/>	Status:	<input type="text" value="l=Obsolete;)"/>
First Name:	<input type="text"/>	Last Name:	<input type="text"/>
Department:	<input type="text"/>	Function:	<input type="text"/>
Account:	<input type="text"/>	Phone:	<input type="text"/>
Mobile:	<input type="text"/>	E-Mail:	<input type="text"/>
City:	<input type="text"/>	Postal Code:	<input type="text"/>
State:	<input type="text"/>	Country:	<input type="text"/>

Go | Reset | Save Query | Organize Queries

5.2 進階篩選的操作方式，可參照客戶。

五、建立聯絡人

(一) 作業目的：

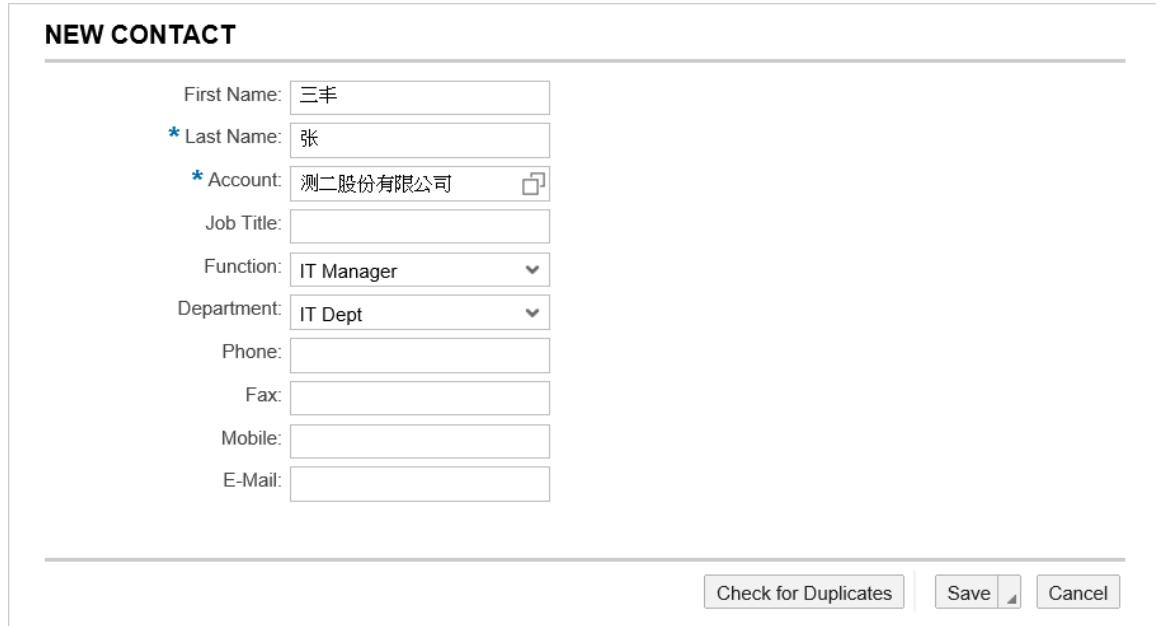
建立新聯絡人的基本資料。

(二) 存取方法：

路徑	選單→CUSTOMERS(客戶)→CONTACTS(連絡人) 或 工具列→ 
----	--

(三) 操作說明：

1 進入後，顯示畫面如下：



NEW CONTACT

First Name: 三丰

* Last Name: 张

* Account: 测二股份有限公司

Job Title:

Function: IT Manager

Department: IT Dept

Phone:

Fax:

Mobile:

E-Mail:

2 按 **Check for Duplicates**，會檢核是否已有相同姓名的聯絡人，以防重覆建檔：

2.1 如果姓名沒有相同，右邊清單將會是空的：

NEW CONTACT

First Name:	三丰
* Last Name:	张
* Account:	测二股份有限公司
Job Title:	
Function:	IT Manager
Department:	IT Dept
Phone:	
Fax:	
Mobile:	
E-Mail:	

DUPLICATE CHECK RESULTS

Name	Account
No records found	

2.2 如有相同的聯絡人姓名，將會顯示相同姓名的聯絡人清單：

NEW CONTACT

First Name:	三丰
* Last Name:	张
* Account:	测四公司
Job Title:	
Function:	Consultant
Department:	IT Dept
Phone:	
Fax:	
Mobile:	
E-Mail:	

DUPLICATE CHECK RESULTS

Name	Account
张 三丰	测二股份有限公司

3 存檔方式與客戶相同。

六、維護聯絡人

(一) 作業目的：

修改或作廢現有聯絡人資料。

(二) 存取方法：

路徑	選單→CUSTOMERS(客戶)→CONTACTS(連絡人)
----	--------------------------------

(三) 操作說明：

1 在下面清單中，點選某一筆聯絡人名稱：

CONTACTS: MY CONTACTS (6)									New	Find...
Name	Account	Function	Department	Phone	Mobile	E-Mail	Status	External ID		
何, 麥克	藍天航空	Distributor	Purchasing Dept	+86 57128111920	+86 13381993103	customer4@ondeman...	Active			
鮑, 文軒	遠見諮詢	Engineer	Purchasing Dept	+86 57128111921	+86 13381993104	customer5@ondeman...	Active			
杜, 天佑	宏新港机	Head of Personnel	Human Resources Dept	+86 57128111924	+86 13381993107	customer8@ondeman...	Active			
阮, 瑾瑜	維奧國際	IT Manager	IT Dept	+86 57128111925	+86 13381993108	customer9@ondeman...	Active			
宋, 勳宇	艾意可諮詢	Marketing Manager	Advertising Dept	+86 57128111926	+86 13381993109	customer10@ondema...	Active			
張, 三丰	測二股份有限公司	IT Manager	IT Dept				Active			

2 開啟聯絡人資料後，按右下角 **Edit** :

CONTACT

張三丰
測二股份有限公司

Status: Active
Name: 張三丰
Title:
Account: 測二股份有限公司
Job Title:
Function: IT Manager
Department: IT Dept
Business Address: 上海
 China

Phone:
Fax:
Mobile:
E-Mail:
Best Reached By:
Contact Permission:
External ID:

OVERVIEW **FEED** **ADDRESSES** **ACTIVITIES** **TICKETS** **LEADS** **SALES LEADS** **OPPORTUNITIES** < > ...

PERSONAL ADDRESSES

Address	Phone	Fax	Mobile	E-Mail	Main
No records found					

Actions **Block**

3 欲凍結某一聯絡人時，開啟聯絡人資料後，應按 **Actions** 再選 **Block** 。

3.1 凍結後，狀態會變成 Blocked：

CONTACT

 张三丰
测二股份有限公司

Status: Blocked

Name: 张三丰

Title:

Account: 测二股份有限公司

Job Title:

Function: IT Manager

Department: IT Dept

Business Address: 上海

China

3.2 欲解除被凍結的客戶，需按 **Actions**，再選 **Set as Active**。

4 欲作廢某一聯絡人時，開啟聯絡人資料後，應按 **Actions** 再選 **Set as Obsolete**。

4.1 作廢後，狀態將會變成 Obsolete：

CONTACT

 张三丰
测二股份有限公司

Status: Obsolete

Name: 张三丰

Title:

Account: 测二股份有限公司

Job Title:

Function: IT Manager

Department: IT Dept

Business Address: 上海

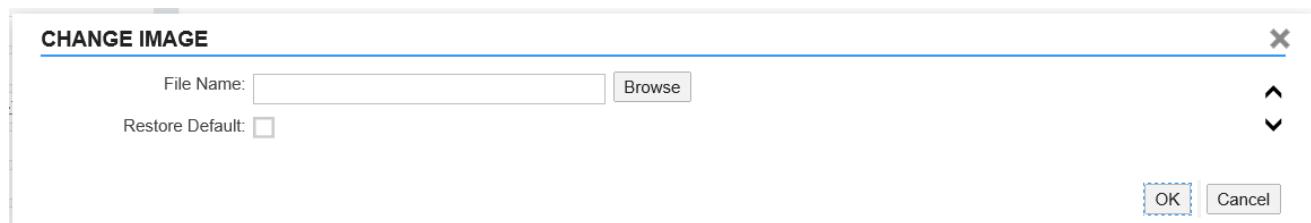
China

4.2 欲解除被作廢的聯絡人，應按 **Actions** ，再選 Set as Active 。

4.3 已作廢的聯絡人，預設不會顯示聯絡人清單中。如果欲顯示，需按  ，修改篩選條件，將 Status 的條件清除，操作方式同客戶。

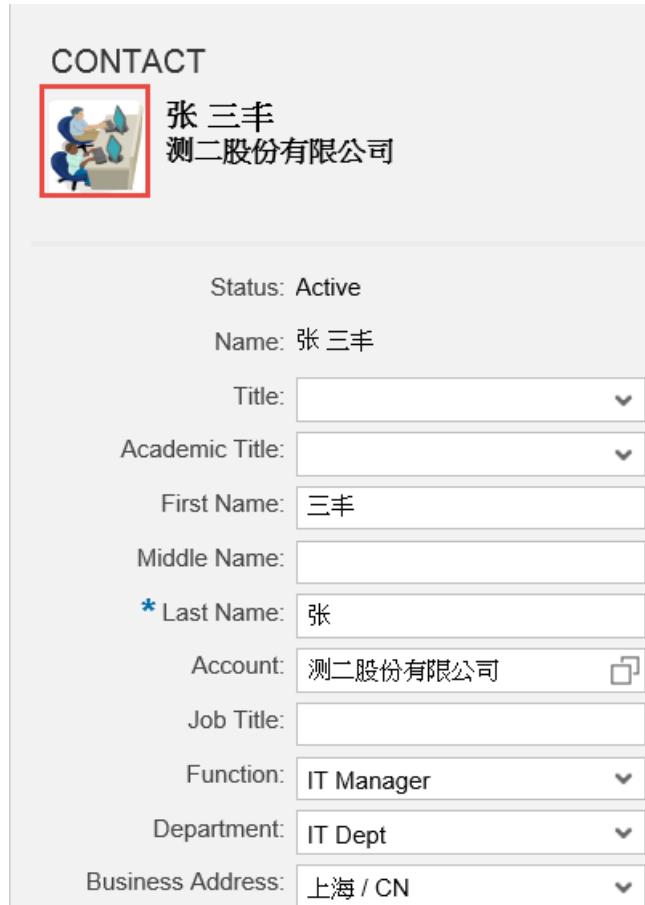
5 欲修改某一聯絡人照片時，開啟聯絡人資料後，應按 **Actions** 再選 Change Image :

5.1 顯示下面畫面，供挑選照片圖檔；如果欲回復系統預設圖示，則勾選 Restore Default :



5.2 上傳後，聯絡人照片將會更新：

CONTACT



Status:	Active
Name:	张三丰
Title:	张三丰
Academic Title:	张三丰
First Name:	三丰
Middle Name:	
* Last Name:	张
Account:	测二股份有限公司
Job Title:	
Function:	IT Manager
Department:	IT Dept
Business Address:	上海 / CN

參、活動管理(BP-C4C-220)

一、預約

(一) 作業目的：

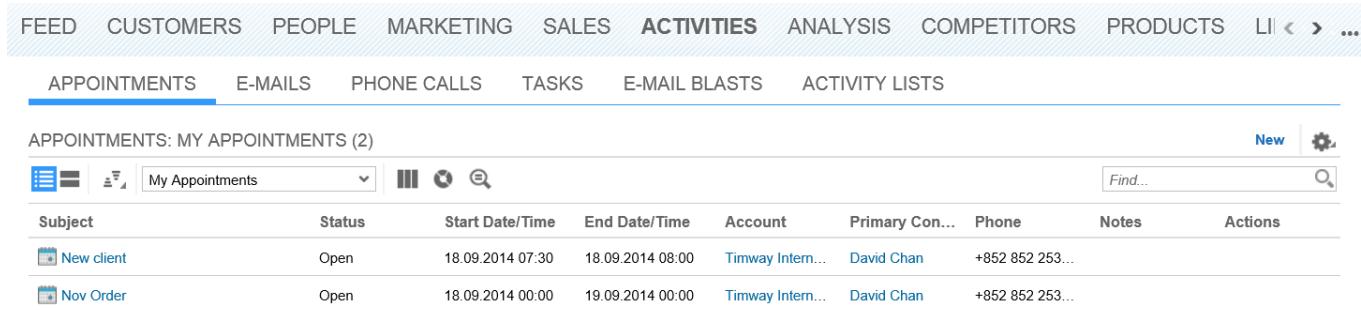
查詢或維護與客戶等的預約。

(二) 存取方法：

路徑	清單：	ACTIVITIES(活動)→APPOINTMENTS(預約)
	建立：	ACTIVITIES(活動)→APPOINTMENTS(預約)→New 或
		工具列→📅 或
		日曆→New→Appointment 或
		LEADS(線索)、SALES LEADS(銷售線索)、ACCOUNTS(客戶)→ACTIVITIES(活動)→APPOINTMENTS(預約)→New (建議使用此路徑)

(三) 操作說明：

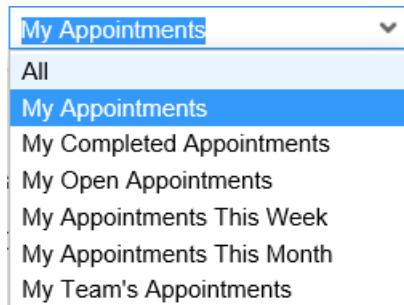
1 進入後，顯示預約清單如下畫面：



The screenshot shows the software's main navigation bar with various tabs like FEED, CUSTOMERS, PEOPLE, etc., followed by a specific section for APPOINTMENTS. Below this, there are sub-navigation links for APPOINTMENTS, E-MAILS, PHONE CALLS, TASKS, E-MAIL BLASTS, and ACTIVITY LISTS. The main content area is titled 'APPOINTMENTS: MY APPOINTMENTS (2)' and displays a list of two entries:

Subject	Status	Start Date/Time	End Date/Time	Account	Primary Con...	Phone	Notes	Actions
New client	Open	18.09.2014 07:30	18.09.2014 08:00	Timway Intern...	David Chan	+852 852 253...		
Nov Order	Open	18.09.2014 00:00	19.09.2014 00:00	Timway Intern...	David Chan	+852 852 253...		

2 清單可以篩選只顯示已完成的預約、尚未完成的預約、本週預約、本月預約或同部門的預約等：



The dropdown menu under 'My Appointments' includes the following options:

- All
- My Appointments (selected)
- My Completed Appointments
- My Open Appointments
- My Appointments This Week
- My Appointments This Month
- My Team's Appointments

3 新增預約的畫面如下：

NEW APPOINTMENT

Subject:			
Account:	<input type="button" value="□"/>		
Primary Contact:	<input type="button" value="□"/>		
* Location:			
All-Day Event:	<input type="checkbox"/>		
Start Date/Time:	24.09.2014 <input type="button" value="1"/>	10:00	<input type="button" value="▼"/>
End Date/Time:	24.09.2014 <input type="button" value="1"/>	10:30	<input type="button" value="▼"/>
Category:	Customer visit <input type="button" value="▼"/>		
Priority:	Normal <input type="button" value="▼"/>		
Status:	Open		
Owner:	<input type="button" value="□"/>		
Sales Territory:	<input type="button" value="□"/>		
Notes:			

ATTENDEES [Add](#)

3.1 如果是從 LEADS(線索)、SALES LEADS(銷售線索)、ACCOUNTS(客戶)選 New， Account(客戶)、Primary Contact(主要連絡人)及 Owner(所有者)欄位值會自動帶出。

3.2 如果有其他一同與會同事，可在 ATTENDEES(參與者)區塊中按 [Add](#) :

ATTENDEES			Add
Name	E-Mail	Action	
<input type="button" value="□"/>			

- 4 在清單中或 FEED(訊息源)中點選某一筆預約，可維護該預約資料，也可按 [Actions](#) 設定狀態：

Set as In Process

Set as Complete

Set as Canceled

Generate Summary

4.1 設定狀態後，畫面的 Status 會對應更新：

APPOINTMENT

与测二公司讨论年度...

Status: Completed

Subject: 与测二公司讨论年度计

Account: 测二股份有限公司

Primary Contact: 张三丰

Organizer: 章曼文

Location: 测二公司

All Day Event:

Start Date/Time: 25.09 1 14:00

End Date/Time: 25.09 1 15:00

二、電話記錄

(一) 作業目的：

查詢或維護來電或去電記錄。

(二) 存取方法：

路徑	清單：	ACTIVITIES(活動)→PHONE CALLS(電話)
	建立：	ACTIVITIES(活動)→PHONE CALLS(電話)→New 或
		工具列→  或
		日曆→New→Phone Call 或
		LEADS(線索)、SALES LEADS(銷售線索)、ACCOUNTS(客戶)→ACTIVITIES(活動)→PHONE CALLS(電話)→New (建議使用此路徑)

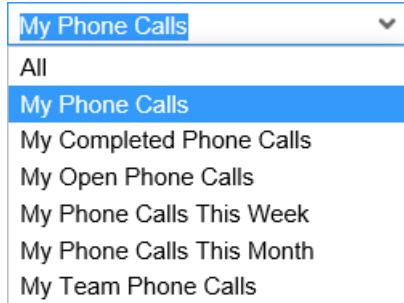
(三) 操作說明：

1 進入後，顯示預約清單如下畫面：



The screenshot shows the CRM software's navigation bar with options like FEED, CUSTOMERS, PEOPLE, MARKETING, SALES, ACTIVITIES, ANALYSIS, COMPETITORS, and PRODUCTS. Below the navigation bar, there is a secondary menu with links to APPOINTMENTS, E-MAILS, PHONE CALLS (which is highlighted in blue), TASKS, E-MAIL BLASTS, and ACTIVITY LISTS. The main content area is titled "PHONE CALLS: MY PHONE CALLS (2)". It displays a table with two rows of call records. The columns are labeled: Subject, Status, Date/Time, Owner, Account, Phone, Priority, Last Changed..., Notes, and Actions. The first call is for "客户询问" (Customer Inquiry) from "章曼文" at "09.09.2014 06:30" with account "测一有限公司" and priority "Normal". The second call is for "与潜一科技初步讨论需求" (Initial discussion with Qianyi Technology about requirements) from "章曼文" at "25.09.2014 10:00" with account "潜一科技" and priority "Normal".

2 清單可以篩選只顯示已完成的電話記錄、尚未完成的電話記錄、本週電話記錄、本月電話記錄或同部門的電話記錄等：



The screenshot shows a dropdown menu titled "My Phone Calls" with several options listed below it: All, My Phone Calls (which is selected and highlighted in blue), My Completed Phone Calls, My Open Phone Calls, My Phone Calls This Week, My Phone Calls This Month, and My Team Phone Calls.

3 新增電話記錄的畫面如下：

NEW PHONE CALL

Subject:

Account: 

Primary Contact: 

Date/Time: 25.09.2014  03:00 

Direction: Outbound 

Category: Telephone call 

Priority: Normal 

Status: Open

Owner: 章曼文 

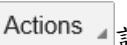
Campaign: 

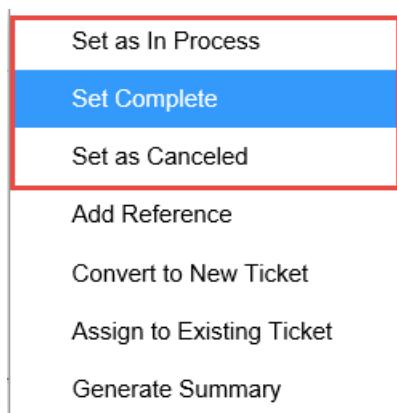
Sales Territory: 

Notes:



3.1 如果是從 LEADS(線索)、SALES LEADS(銷售線索)、ACCOUNTS(客戶)選 New，Account(客戶)及 Primary Contact(主要連絡人)欄位值會自動帶出。

- 4 在清單中或 FEED 中點選某一筆電話記錄，可維護該電話記錄資料，也可按  設定狀態：



4.1 設定狀態後，畫面的 Status 會對應更新：

PHONE CALL



与潜一科技初步讨论...

Status: Completed

Subject: 与潜一科技初步讨论...

Date/Time: 25.09.1 10:00

Direction: Outbound

Category: Marketing

Priority: Normal

Account: 潜一科技

Primary Contact: 李文好

Owner: 章曼文

三、任務

(一) 作業目的：

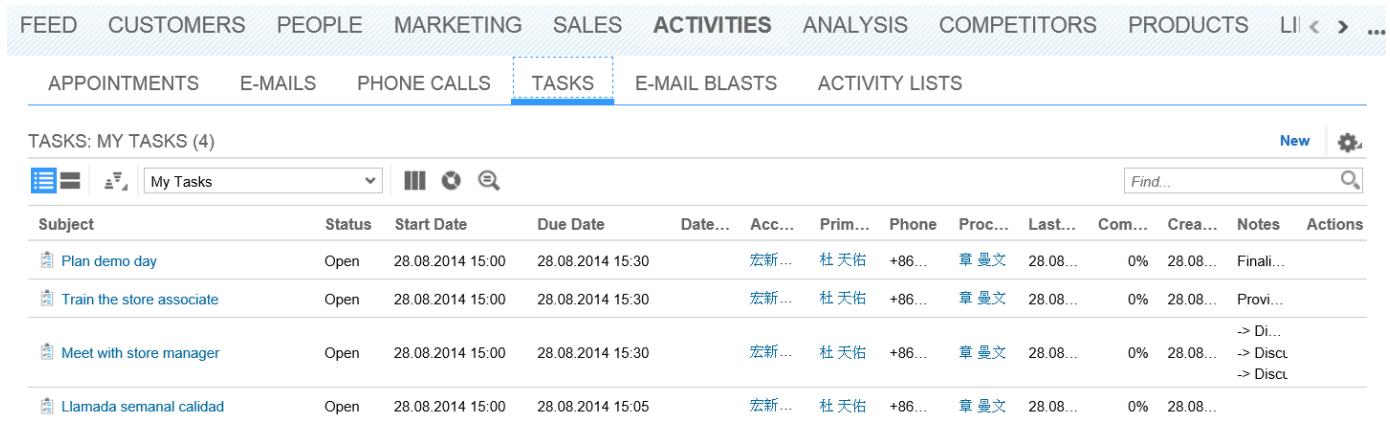
查詢或維護拜訪客戶前的準備、事後的待辦事項等任務。任務可能是本身的備忘記錄或交辦其他同事的事項。機會或拜訪的任務也可由 Activity Planner(活動計畫器)自動產生。

(二) 存取方法：

路徑	清單：	ACTIVITIES(活動)→TASKS(任務)
	建立：	ACTIVITIES(活動)→TASKS(任務)→New 或
		工具列→  或 LEADS(線索)、SALES LEADS(銷售線索)、ACCOUNTS(客戶)→ACTIVITIES(活動)→TASKS(任務)→New (建議使用此路徑)

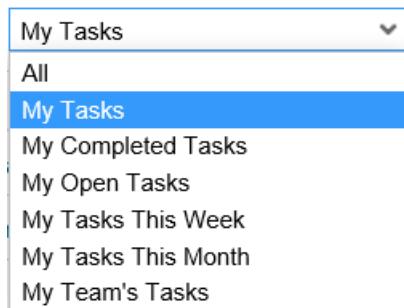
(三) 操作說明：

1 進入後，顯示任務清單如下畫面：



TASKS: MY TASKS (4)														
Subject		Status	Start Date	Due Date	Date...	Acc...	Prim...	Phone	Proc...	Last...	Com...	Crea...	Notes	Actions
 Plan demo day		Open	28.08.2014 15:00	28.08.2014 15:30		宏新...	杜天佑	+86...	章曼文	28.08...	0%	28.08...	Finali...	
 Train the store associate		Open	28.08.2014 15:00	28.08.2014 15:30		宏新...	杜天佑	+86...	章曼文	28.08...	0%	28.08...	Provi...	
 Meet with store manager		Open	28.08.2014 15:00	28.08.2014 15:30		宏新...	杜天佑	+86...	章曼文	28.08...	0%	28.08...		
 Llamada semanal calidad		Open	28.08.2014 15:00	28.08.2014 15:05		宏新...	杜天佑	+86...	章曼文	28.08...	0%	28.08...		

2 清單可以篩選只顯示已完成的任務、尚未完成的任務、本週任務、本月任務或同部門的任務等：



3 新增任務的畫面如下：

NEW TASK

Subject:

Account: 

Primary Contact: 

Processor: 章 曼文 

Completion: 0% 

Start Date/Time: 25.09.2014  04:00 

Due Date/Time: 25.09.2014  04:30 

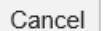
Category: Preparation 

Priority: Normal 

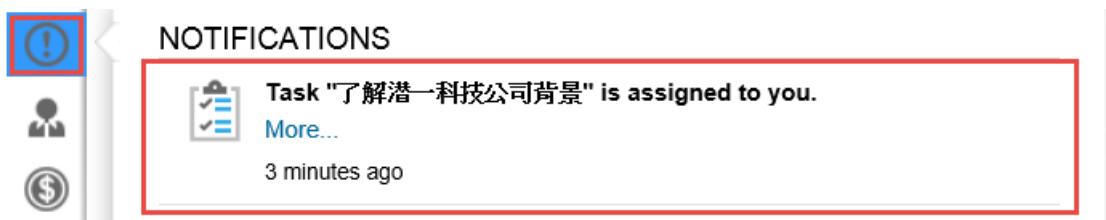
Status: Open

Owner: 章 曼文 

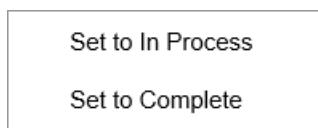
Notes:

 Save  Cancel

- 3.1 如果是從 LEADS(線索)、SALES LEADS(銷售線索)、ACCOUNTS(客戶)選 New，Account(客戶)及 Primary Contact(主要連絡人)欄位值會自動帶出。
- 3.2 如果 Processor 指定其他同事，當事人將會收到通知：



- 4 在清單中或 FEED(訊息源)中點選某一筆任務，可維護該任務資料，也可按  設定狀態：



- 4.1 設定狀態後，畫面的 Status 會對應更新：

TASK



了解潛一科技公司背景

Status: Completed

Subject: 了解潛一科技公司背景

Processor: 李雪梅



Start Date/Time: 25.09.2014 1 15:00

Due Date/Time: 25.09.2014 1 16:00

Date Completed: 25.09.2014

Completion (%): 100%

Category: Visit preparation

Priority: Normal

Account: 潛一科技



Primary Contact: 李文好



Reason Code:

四、活動計畫

(一) 作業目的：

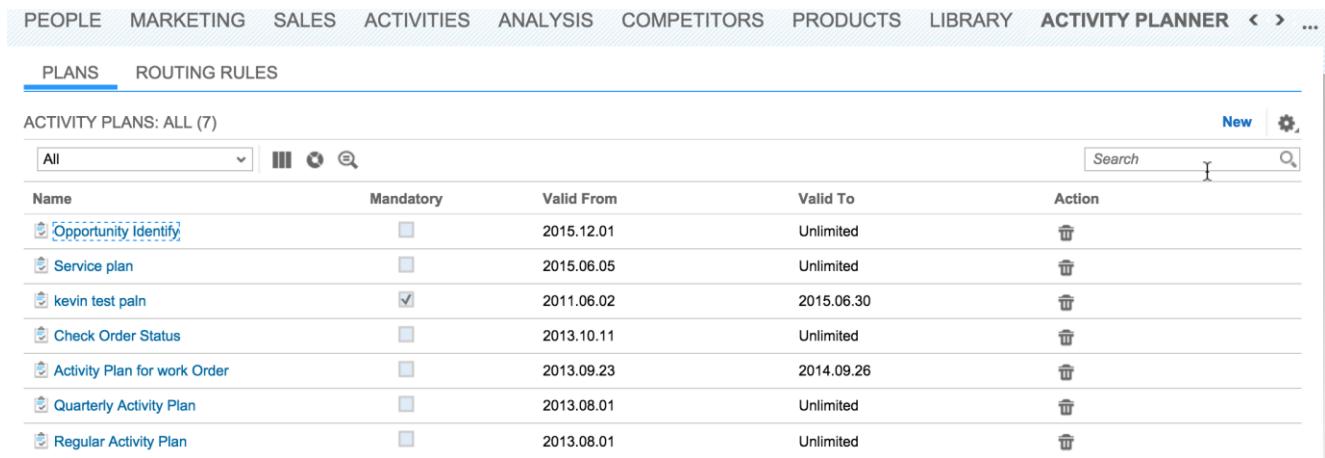
此作業通常由管理者負責建立及維護。活動計畫目的在針對拜訪、機會等規範標準的任務及調查表，以落實業務人員應執行的工作。

(二) 存取方法：

路徑	清單：	ACTIVITIE PLANNER(活動計畫器)→PLANS(計畫)
	建立：	ACTIVITIE PLANNER(活動計畫器)→PLANS(計畫)→New

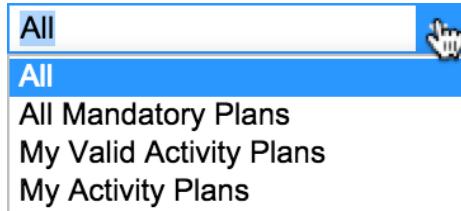
(三) 操作說明：

1 進入後，顯示計畫清單如下畫面：

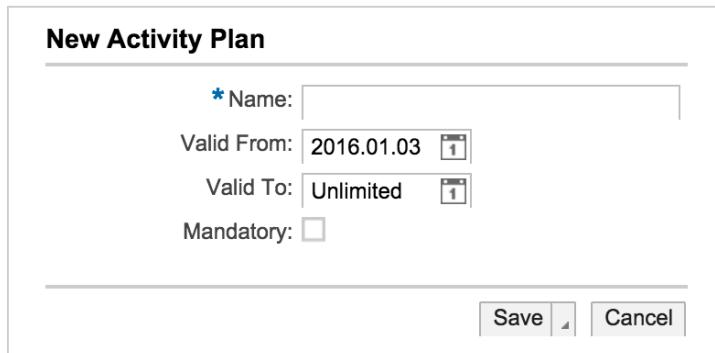


Name	Mandatory	Valid From	Valid To	Action
Opportunity Identify	<input type="checkbox"/>	2015.12.01	Unlimited	
Service plan	<input type="checkbox"/>	2015.06.05	Unlimited	
kevin test plan	<input checked="" type="checkbox"/>	2011.06.02	2015.06.30	
Check Order Status	<input type="checkbox"/>	2013.10.11	Unlimited	
Activity Plan for work Order	<input type="checkbox"/>	2013.09.23	2014.09.26	
Quarterly Activity Plan	<input type="checkbox"/>	2013.08.01	Unlimited	
Regular Activity Plan	<input type="checkbox"/>	2013.08.01	Unlimited	

2 清單可以篩選只顯示必需的任務計畫、有效的任務計畫或我的計畫等：



3 新增計畫的畫面如下：



New Activity Plan

* Name:

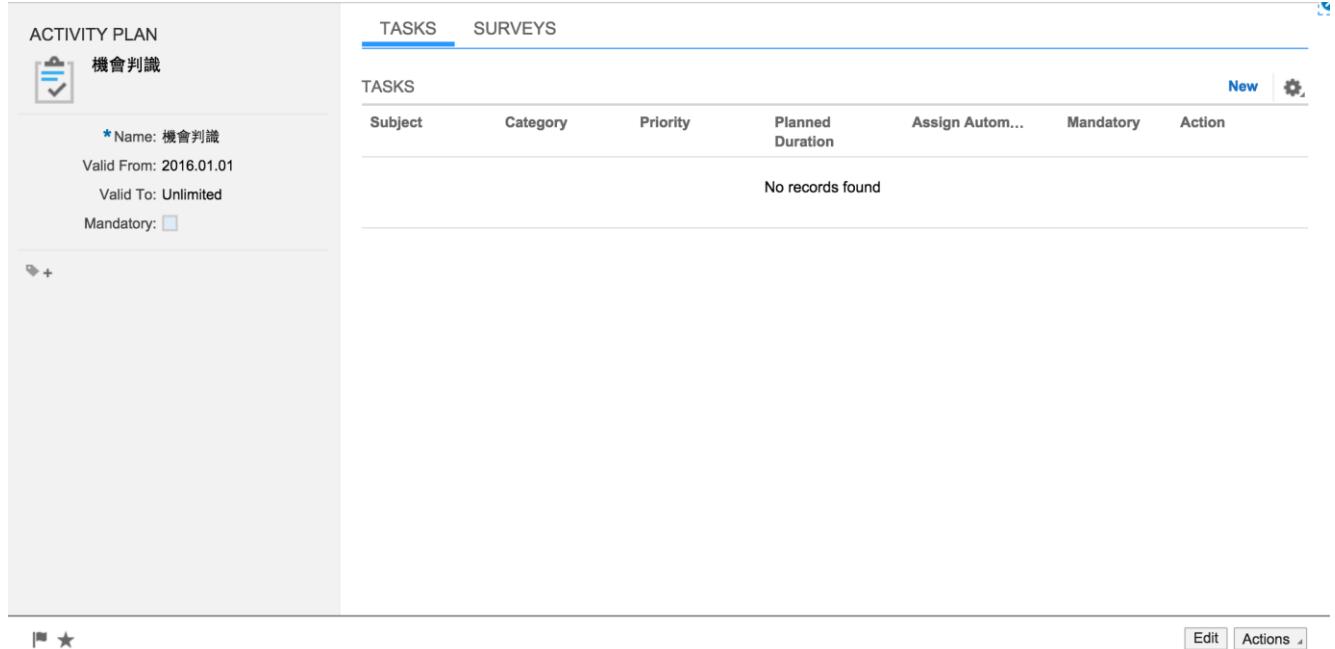
Valid From: 2016.01.03

Valid To: Unlimited

Mandatory:

Save Cancel

4 存檔後開啟，明細畫面有兩個頁籤 TASK(任務)及 SURVEYS(調查)：



The screenshot shows the 'ACTIVITY PLAN' screen. On the left, there's a sidebar with a checklist icon labeled '機會判識'. Below it are fields for 'Name: 機會判識', 'Valid From: 2016.01.01', 'Valid To: Unlimited', and 'Mandatory: '. A '+' button is at the bottom. The main area has two tabs: 'TASKS' (selected) and 'SURVEYS'. Under 'TASKS', there's a table with columns: Subject, Category, Priority, Planned Duration, Assign Autom..., Mandatory, and Action. A 'New' button is at the top right of the table. Below the table, it says 'No records found'. At the bottom right are 'Edit' and 'Actions' buttons.

5 欲建立標準任務時，按 **New** :

Define Task

* Subject:	討論購置計畫及預算
Category:	Customer Visit
Priority:	Normal
Planned Duration:	
Mandatory:	<input type="checkbox"/>
Assign Automatically:	<input type="checkbox"/>
<input type="button" value="Add"/> <input type="button" value="Cancel"/>	

- 5.1 Category(類別)：區分為市場行銷、客戶拜訪、拜訪準備、準備、電話等。
 5.2 Assign Automatically(自動分配)：建立機會或拜訪時，自動產生此任務。
- 6 欲建立調查表時，

6.1 在 SURVEYS(調查)頁籤按 **Add** (添加)：

Add Survey

* Survey:

6.1.1 Survey(調查)：輸入已設計好的問卷調查表。

- 6.2 輸入調查表後，清單中將增加一筆，可再決定是否勾選 Assign Automatically(自動分配)及 Mandatory(必需)：

ACTIVITY PLAN		TASKS	SURVEYS						
機會判識									
* Name: 機會判識			Name	Category	Valid From	Valid To	Assign Automati...	Mandatory	Action
Valid From: 2016.01.01		<input type="button" value=""/>	客戶資訊需求...	Products			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value=""/>
Valid To: Unlimited		<input type="button" value=""/>							
Mandatory: <input type="checkbox"/>									

五、傳送規則

(一) 作業目的：

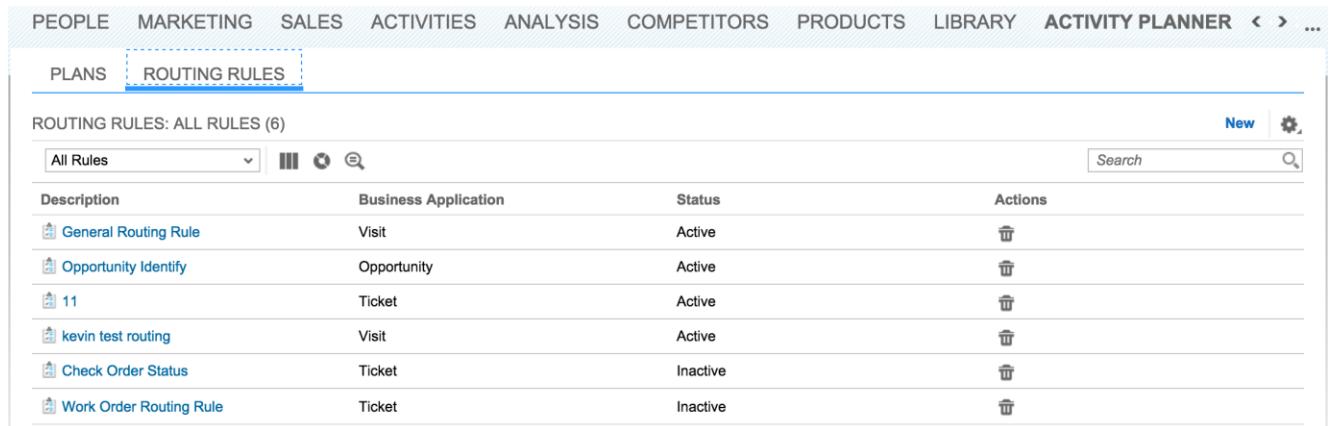
此作業通常由管理者負責建立及維護。傳送規則目的在定義哪一種活動在某些條件成立時，所適用的活動計畫。所以一個傳送規則包括兩個部份：一為條件內容，另一為所適用的活動計畫。

(二) 存取方法：

路徑	清單：	ACTIVITIE PLANNER(活動計畫器)→ROUTING RULES(傳送規則)
	建立：	ACTIVITIE PLANNER(活動計畫器)→ ROUTING RULES(傳送規則)→New

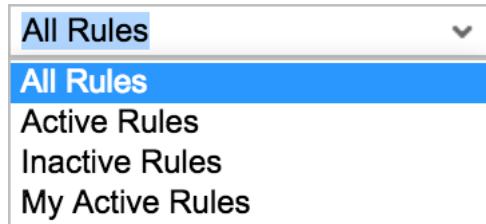
(三) 操作說明：

1 進入後，顯示規則清單如下畫面：



The screenshot shows the 'Activity Planner' module. The top navigation bar includes links for PEOPLE, MARKETING, SALES, ACTIVITIES, ANALYSIS, COMPETITORS, PRODUCTS, LIBRARY, and ACTIVITY PLANNER. Below the navigation is a sub-menu with 'PLANS' and 'ROUTING RULES', where 'ROUTING RULES' is highlighted with a blue border. The main content area displays a table titled 'ROUTING RULES: ALL RULES (6)'. The table has columns for 'Description', 'Business Application', 'Status', and 'Actions'. Each row contains a small thumbnail icon, the rule name, its application type, its status (Active or Inactive), and a delete icon. A 'New' button and a search bar are located at the top right of the table.

2 清單可以篩選只顯示有效的規則、無效的規則或我的有效規則等：



A dropdown menu titled 'All Rules' is shown. It contains four items: 'All Rules' (which is currently selected and highlighted in blue), 'Active Rules', 'Inactive Rules', and 'My Active Rules'.

3 新增規則的畫面如下：

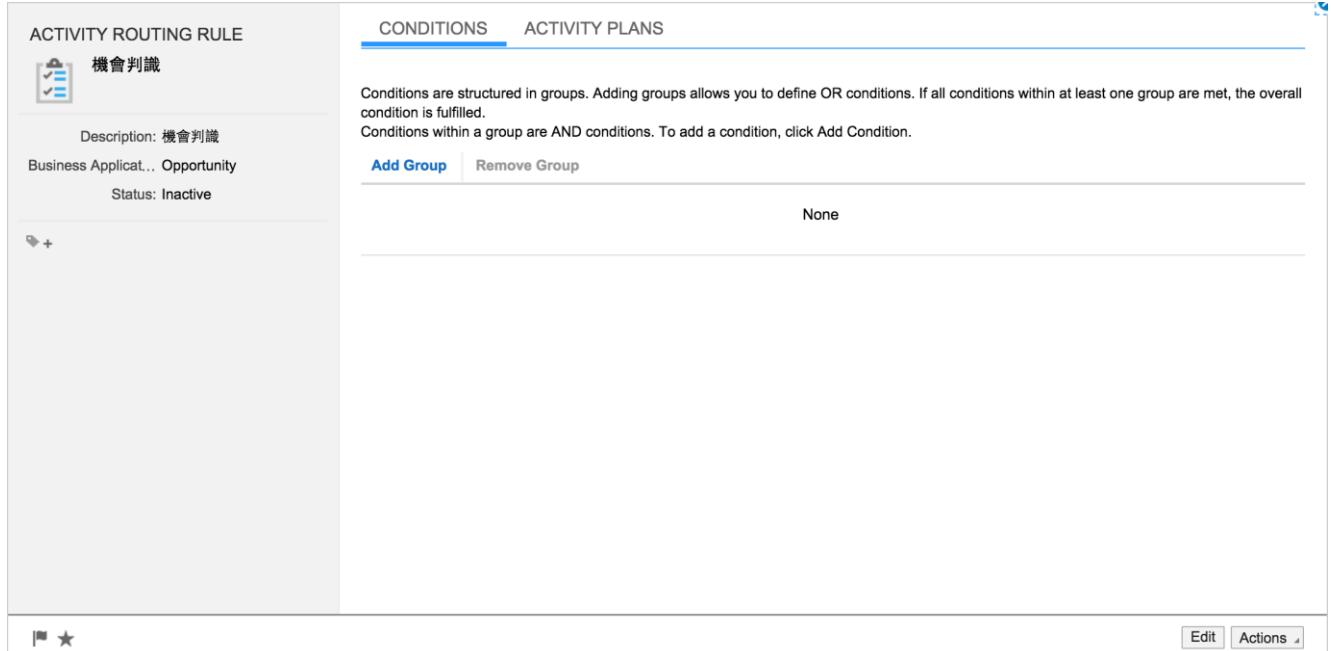
New Activity Routing Rule

* Description: 機會判識

* Business Application: Opportunity

3.1 Business Application(業務運用)：指此規則適用於哪一種交易。包括：線索、機會、報價、服務及拜訪。

4 存檔後開啟，畫面包括 CONDITIONS(條件)及 ACTIVITY PLANS(活動計劃)兩個頁籤：



The screenshot shows the 'ACTIVITY ROUTING RULE' configuration screen. On the left, there's a sidebar with basic rule details: Name (機會判識), Description (機會判識), Business Application (Opportunity), and Status (Inactive). The main area has two tabs: 'CONDITIONS' (highlighted in blue) and 'ACTIVITY PLANS'. Under 'CONDITIONS', there's a note about grouping conditions and buttons for 'Add Group' and 'Remove Group'. Below this, it says 'None'. At the bottom right of the main area, there are 'Edit' and 'Actions' buttons.

4.1 CONDITIONS(條件)：定義適用此規則的條件，例如哪一類機會或哪一區域等。

4.2 ACTIVITY PLANS(活動計劃)：定義此規則成立時，將引用哪一個活動計畫。

5 在 CONDITIONS(條件)按 **Add Group** (添加組)，可新增條件式：

5.1 首先指定作為條件的欄位，欄位清單是根據之前所指定的 Business Application(業務運用)對應列出：

Edit Condition

* Field: Value Before Object ...

Account
Account ID
Approval Status
Category
Changed By
Changed On
Close Date
Created By
Created On
Custom Status

Category

5.2 挑選好欄位後，將顯示判斷式及作為判斷的值：

Edit Condition

* Field: Category Value Before Object ...

* Compare Operator: Equal to

* With: Value

Prospect for Service

5.2.1 Compare Operator(比較運算子)：視所選擇的欄位，可挑選「等於」、「不等於」、「大於」、「大於或等於」、「小於」或「小於或等於」。

5.2.2 With(與)：視所選擇的欄位，可挑選「值」或「欄位」

5.2.3 值：輸入作為判斷的值

5.3 按 **OK** (確定)後，將新增一筆至清單中：

CONDITIONS ACTIVITY PLANS

Conditions are structured in groups. Adding groups allows you to define OR conditions. If all conditions within at least one group are met, the overall condition is fulfilled.

Conditions within a group are AND conditions. To add a condition, click Add Condition.

Add Group	Remove Group				
Group 1	Category	Equal to	Prospect for Ser		

5.3.1 : 可新增另一條件式，同一群組中的條件式是「AND」的關係；如果要指定「OR」的關係條件式，則需另新增一 Group(組)

5.3.2 : 修改條件式

5.3.3 : 刪除條件式

- 6 在 ACTIVITY PLANS (活動計畫)按 **Add** (添加)，
6.1 可指定條件成立時所適用的活動計畫，畫面如下：



Activity Plan

Name: 機會判識

Mandatory:

Valid From: 2016.01.01

Valid To: Unlimited

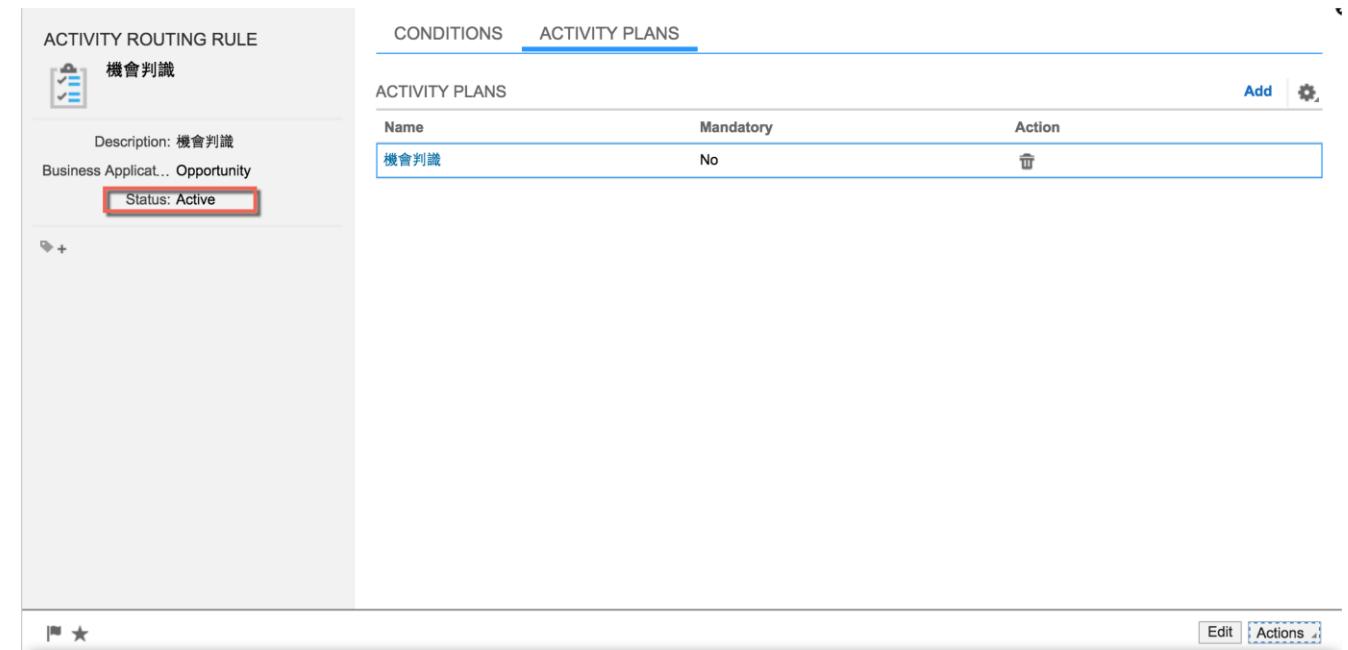
Add Cancel

- 6.2 存檔後，清單中將新增一筆：

CONDITIONS ACTIVITY PLANS
ACTIVITY PLANS

Name	Mandatory	Action		
機會判識	No			

- 7 規則存檔後，需按 **Actions** → **Set as Active** (生效)，狀態變成 Active(有效)，才能使用：



Name	Mandatory	Action
機會判識	No	

8 例如日後在某筆「機會」中，

- 8.1 按 **Actions**，選 Refresh from Activity Plan(從活動計畫刷新)，

- Set as Open**
- Set as In Process**
- Set as Won**
- Set as Lost**
- Set as Stopped**
- Copy**
- Submit for Approval**
- Withdraw from Approval**
- Refresh from Activity Plan**
- Check Consistency**
- Preview**

- 8.2 如符合條件，即會根據活動計畫自動建立屬於 Assign Automatically(自動分配)的任務及調查：

OPPORTUNITY

吳良企業導入ERP案

Account: 吳良企業
Name: 吳良企業導入ERP案
Primary Contact: 吳大老
Priority: Normal
Source:
Status: In Process
Reason for Status:
Approval Status: Approved
Sales Cycle: Mitutoyo opportunity
Sales Phase: 尚未報價
Days in Sales Ph...
Probability: 10%
Publish to Forecast:
Expected Value: 300,000.00 USD
Total Negotiated ... 0.00 USD
Weighted Value: 30,000.00 USD
Start Date: 2016.01.03

□ ☰ 🔍 ★

SURVEYS

Name	Status	Category	Actions
客戶資訊需求調查表	Open	Products	

Attachments

Title Type Change... Changed By

Edit **Actions**

8.3 活動計畫如果未指定 Assign Automatically(自動分配)的任務，也可在任務中選 Add Tasks from Activity Plan(從活動計畫添加任務)：

OPPORTUNITY

吳良企業導入ERP案

Account: 吳良企業
Name: 吳良企業導入ERP案
Primary Contact: 吳大老
Priority: Normal
Source:
Status: In Process
Reason for Status:
Approval Status: Approved
Sales Cycle: Mitutoyo opportunity
Sales Phase: 尚未報價
Days in Sales Ph...
Probability: 10%
Publish to Forecast:
Expected Value: 300,000.00 USD
Total Negotiated ... 0.00 USD
Weighted Value: 30,000.00 USD
Start Date: 2016.01.03

□ ☰ 🔍 ★

OVERVIEW FEED PRODUCTS RELATED OPPORTUNITIES SALES ACTIVITIES COMI < > ...

APPOINTMENTS

Subject	Status	Sales P...	Start D...	End Da...	Owner	Action
No records found						

ACTIVITY ADVISOR

Subject	Mandatory	Added
No records found		

TASKS

Subject	Status	Sales ...	Start ...	Due D...	Owner	Action
討論購置計畫及預算	Open	尚未報價	2016.0...	2016.0...	張大師	

Add

Refresh

Add Tasks from Activity Plan

PHONE CALLS

Subject	Status	Sales Pha...	Start Date...	Owner	Action
No records found					

E-MAILS

Subject	Status	Sales Pha...	Start Date...	Owner	Action
No records found					

Edit **Actions**

六、調查表建立

(一) 作業目的：

此作業通常由管理者負責建立及維護。調查表可供作市場調查或客戶的滿意度調查等，可應用在拜訪客戶時業務人員輸入。此功能在設計調查表的問題內容。

(二) 存取方法：

路徑	選單→SURVEYS(調查)
----	----------------

(三) 操作說明：

1 進入後，按 **New** 可建立調查表的名稱：

New Survey

* Name:	客戶資訊需求調查表
* Category:	Products
Valid From:	1
Valid To:	1
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

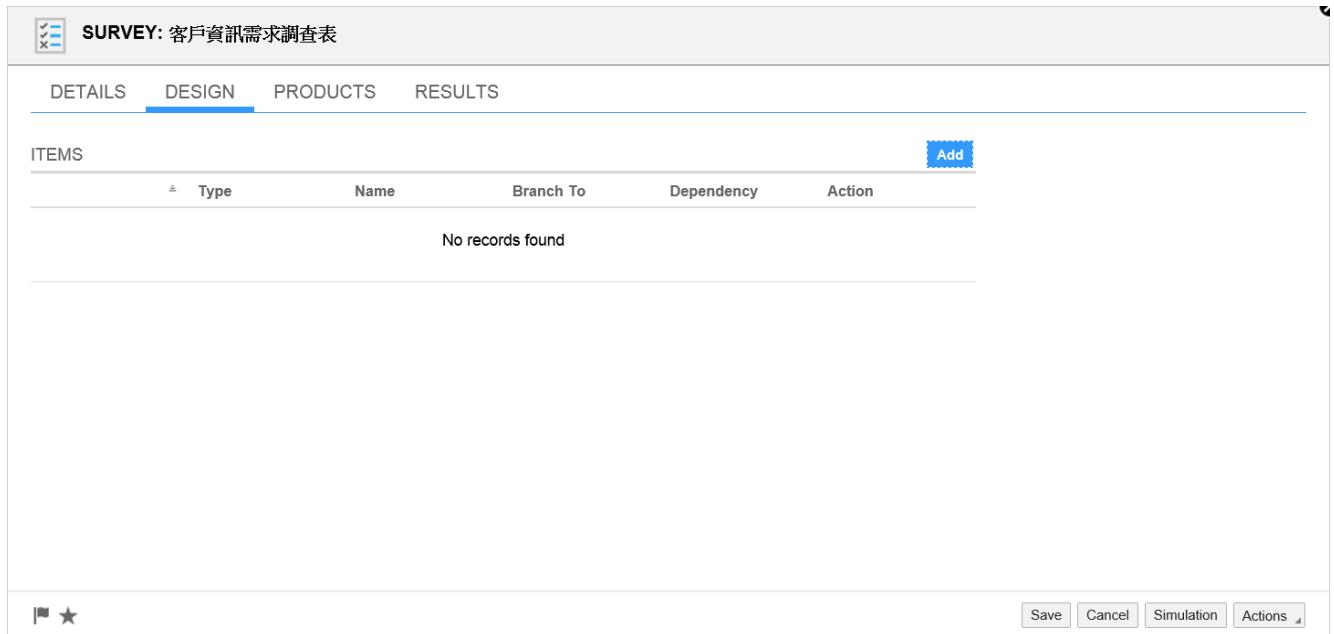
2 選 Save and Open，進入調查表明細資料畫面，按 **Edit** :

SURVEY: 客戶資訊需求調查表

DETAILS	DESIGN	PRODUCTS	RESULTS
* Name: 客戶資訊需求調查表 * Category: Products Valid From: 1 Valid To: 1 Status: In Preparation Previous Answers: <input type="checkbox"/> Matrix View: <input type="checkbox"/>	<input type="button" value="Edit"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="Simulation"/> <input type="button" value="Actions"/>		

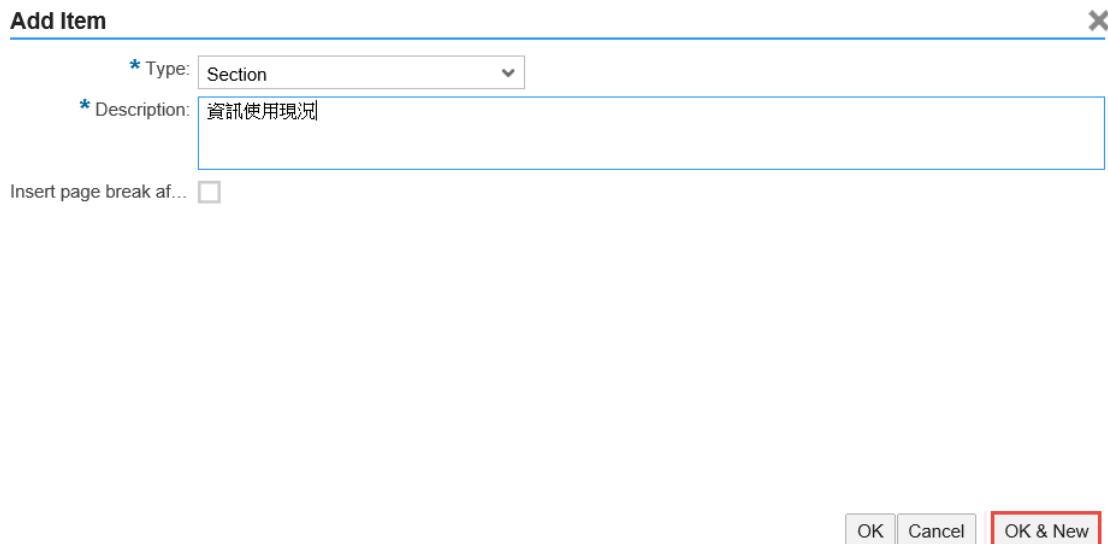
2.1 Matrix View(矩陣視圖)：供行動裝置使用，限問題小於 10 題。

3 切換至 DESIGN(設計)頁籤，可設計問卷：



The screenshot shows a software application window titled "SURVEY: 客戶資訊需求調查表". The top navigation bar has tabs: DETAILS, DESIGN (which is underlined), PRODUCTS, and RESULTS. Below the tabs is a table header with columns: Type, Name, Branch To, Dependency, and Action. A blue "Add" button is located at the top right of the table area. The message "No records found" is displayed below the table. At the bottom right of the window are buttons for Save, Cancel, Simulation, and Actions.

3.1 按 **Add** 鈕，新增問題，以 Type(類型)區段為例：



The dialog box is titled "Add Item". It contains two main input fields: "Type" set to "Section" and "Description" containing the text "資訊使用現況". Below these fields is a checkbox labeled "Insert page break af...". At the bottom right of the dialog are three buttons: "OK", "Cancel", and "OK & New", where "OK & New" is highlighted with a red border.

3.1.1 Type：問題類別。

3.1.1.1 Amount：金額類問題。

3.1.1.2 Multiple Choice(select multiple)：複選題。

3.1.1.3 Multiple Choice(select one)：單選題。

3.1.1.4 Quantity：數量類問題。

3.1.1.5 Section：區段，可把多個問題群組在一區段歸類。

3.1.1.6 Text：開放性問題。

3.2 輸入完成按 **OK & New**，可供輸入下一問題，以 Type Multiple Choice(select multiple) (不

定項選擇（選擇多項）)為例，應在 ANSWER OPTIONS 中輸入回覆的選項：

Add Item

* Type: <input type="text" value="Multiple Choice (select multiple)"/>	Question Category: <input type="text"/>												
* Question: <input type="text" value="目前已上線的產品有哪些"/>													
Insert page break af... <input type="checkbox"/>													
Require an answer f... <input checked="" type="checkbox"/>													
Score: <input type="text"/>	Branch To: <input type="text"/>												
ANSWER OPTIONS <table border="1"> <thead> <tr> <th>Answer Option</th> <th>Answer Category</th> <th>Score</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>ERP</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="button"/> <input type="button"/> <input type="button"/></td> </tr> <tr> <td>CRM</td> <td><input type="text"/></td> <td><input type="text"/></td> <td></td> </tr> </tbody> </table>		Answer Option	Answer Category	Score	Actions	ERP	<input type="text"/>	<input type="text"/>	<input type="button"/> <input type="button"/> <input type="button"/>	CRM	<input type="text"/>	<input type="text"/>	
Answer Option	Answer Category	Score	Actions										
ERP	<input type="text"/>	<input type="text"/>	<input type="button"/> <input type="button"/> <input type="button"/>										
CRM	<input type="text"/>	<input type="text"/>											
<input type="button" value="OK"/> <input type="button" value="OK & New"/>													

3.2.1 Score(分數)：可以針對問題及答案給予分數，以利系統統計調查結果的分數。

3.3 以 Type Multiple Choice(select one)(不定項選擇（選擇一項）)為例，應在 ANSWER OPTIONS(回答選項)中輸入回覆的選項：

Add Item

Insert page break af... <input type="checkbox"/>																															
Require an answer f... <input type="checkbox"/>																															
Score: <input type="text"/>	Default Branching: <input type="text"/>																														
ANSWER OPTIONS <table border="1"> <thead> <tr> <th>Answer Option</th> <th>Answer Category</th> <th>Score</th> <th>Branch To</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>1. SAP</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="button"/> <input type="button"/> <input type="button"/></td> </tr> <tr> <td>2. Oracle</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="button"/> <input type="button"/> <input type="button"/></td> </tr> <tr> <td>3. 鼎新</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="button"/> <input type="button"/> <input type="button"/></td> </tr> <tr> <td>4. 聯合</td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="button"/> <input type="button"/> <input type="button"/></td> </tr> <tr> <td>5. 其他</td> <td><input type="text"/></td> <td><input type="text"/></td> <td>4 - 目前使用的ERF <input type="text"/></td> <td><input type="button"/> <input type="button"/> <input type="button"/></td> </tr> </tbody> </table>		Answer Option	Answer Category	Score	Branch To	Actions	1. SAP	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button"/> <input type="button"/> <input type="button"/>	2. Oracle	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button"/> <input type="button"/> <input type="button"/>	3. 鼎新	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button"/> <input type="button"/> <input type="button"/>	4. 聯合	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button"/> <input type="button"/> <input type="button"/>	5. 其他	<input type="text"/>	<input type="text"/>	4 - 目前使用的ERF <input type="text"/>	<input type="button"/> <input type="button"/> <input type="button"/>
Answer Option	Answer Category	Score	Branch To	Actions																											
1. SAP	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button"/> <input type="button"/> <input type="button"/>																											
2. Oracle	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button"/> <input type="button"/> <input type="button"/>																											
3. 鼎新	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button"/> <input type="button"/> <input type="button"/>																											
4. 聯合	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button"/> <input type="button"/> <input type="button"/>																											
5. 其他	<input type="text"/>	<input type="text"/>	4 - 目前使用的ERF <input type="text"/>	<input type="button"/> <input type="button"/> <input type="button"/>																											
<input type="button" value="OK"/> <input type="button" value="OK & New"/>																															

3.3.1 Branch To(關聯到)：如果回覆了此選項，步驟需跳到另一問題或結束調查。

3.4 以 Type Text(文本)為例：

Add Item

* Type: Question Category:

* Question: 目前使用的ERP，如果不是上述廠牌，請輸入：

Insert page break af...

Require an answer f...

Branch To:

3.5 Branch To 為結束調查的例子：
Add Item

* Type: Question Category:

* Question: 今年有無汰換ERP計劃

Insert page break af...

Require an answer f...

Score: Default Branching:

ANSWER OPTIONS

Answer Option	Answer Category	Score	Branch To	Actions
有	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
無	<input type="text"/>	<input type="text"/>	<input type="text" value="7 - End of Survey"/>	<input type="text"/>

3.6 以 Type Amount(金額)為例：
Add Item

* Type: Question Category:

* Question: 採購新ERP的預算

Insert page break af...

Require an answer f...

Branch To:

* Currency:

Answer Category:

3.7 以 Type Quantity(數量)為例：

Add Item

* Type: Question Category:

* Question:

Insert page break af...

Require an answer f...

Branch To:

* Unit of Measure: Answer Category:

OK Cancel OK & New

4 設計完調查表後，可以先模擬，按 **Simulation** :

SURVEY

ERP使用現況
目前已上線的產品有哪些 *

ERP
 CRM
 BI
 MES
 SCM

目前所使用ERP的供應商是哪一家

其他
 聯合
 鼎新
 Oracle
 SAP

Close Previous Next Finish Submit

4.1 回答完一網頁問題，應按 **Next** 至下一頁。

4.2 最後完成按 **Submit** 送出結果。

5 模擬測試完成，正式啟用，需按 **Actions** ，選 **Activate** 。

肆、銷售線索管理(BP-C4C-230)

一、建立銷售線索

(一) 作業目的：

行銷活動或其他管道獲知有商機時，可建立銷售線索，銷售線索是整個銷售循環的第一步。

(二) 存取方法：

路徑	選單→SALES(銷售)→SALES LEADS(銷售線索)→New 或 工具列→ 
----	--

(三) 操作說明：

1 進入後，新增畫面如下：

New Sales Lead

* Name:	<input type="text"/>
* Account:	<input type="text"/> 
Primary Contact:	<input type="text"/> 
Source:	<input type="text"/>
Qualification Level:	<input type="text"/>
Priority:	Normal 
Status:	Open 
Category:	<input type="text"/>
Campaign:	<input type="text"/> 
Marketing Unit:	<input type="text"/> 
Sales Unit:	<input type="text"/> 
Owner (Sales):	<input type="text"/> 
Owner (Marketing):	<input type="text"/> 
Note:	<input type="text"/>
Territory ID:	<input type="text"/> 
Territory Name:	<input type="text"/>



1.1 Qualification Level 如果未輸入，Status 將會是 Open。

二、評估等級

(一) 作業目的：

根據初步銷售活動等，研判銷售線索的等級。

(二) 存取方法：

路徑	選單→SALES(銷售)→SALES LEADS(銷售線索)
----	--------------------------------

(三) 操作說明：

1 進入後，顯示銷售線索清單如下畫面：

SALES LEADS: MY LEADS (261)									
Name		Account	Primary Contact	Source	Qualification Level	Status	Category	Owner (Sales)	Owner (Marketing)
① 测五公司购置笔记...	测五公司			Trade fair	Hot	Qualified		章 曼文	章 曼文
② 给客户10212的包...	远见咨询	鲍 文轩		Roadshow	Warm	Qualified		章 曼文	章 曼文
③ 给客户10216的包...	维奥国际	阮 娴瑜		Telephone inquiry	Hot	Qualified		章 曼文	章 曼文
④ 给客户10211的包...	蓝天航空	何 麦克		Campaign	Warm	Qualified		章 曼文	章 曼文
⑤ 给客户10212的包...	远见咨询	鲍 文轩		Roadshow	Warm	Qualified		章 曼文	章 曼文
⑥ 给客户10216的包...	维奥国际	阮 娴瑜		Telephone inquiry	Hot	Qualified		章 曼文	章 曼文

2 點選及開啟銷售線索資料後，按右下角  後，在 Qualification Level(評估等級)，挑選合適的值：

SALES LEAD


测四公司购置电脑

Lead ID: 25083

External ID:

* Name:	测四公司购置电脑
* Account:	测四公司 
Primary Contact:	
Source:	Email 
Qualification Level:	Cold 
Priority:	Normal 

3 輸入 Qualification Level 後，狀態會更新為 Qualified(已審核)：

SALES LEAD

测四公司购置电脑



Lead ID: 25083

External ID:

Name: 测四公司购置电脑

Account: [测四公司](#)

Primary Contact:

Source: Email

Qualification Level: Cold

Priority: Normal

Status: **Qualified**

Category:

三、接受/拒絕

(一) 作業目的：

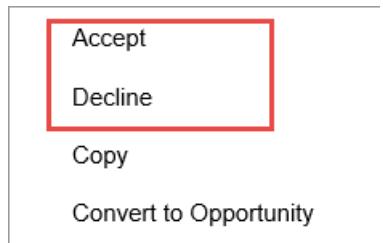
業務人員在 FEED 接收到分配的銷售線索，研判後，回覆接受或拒絕。

(二) 存取方法：

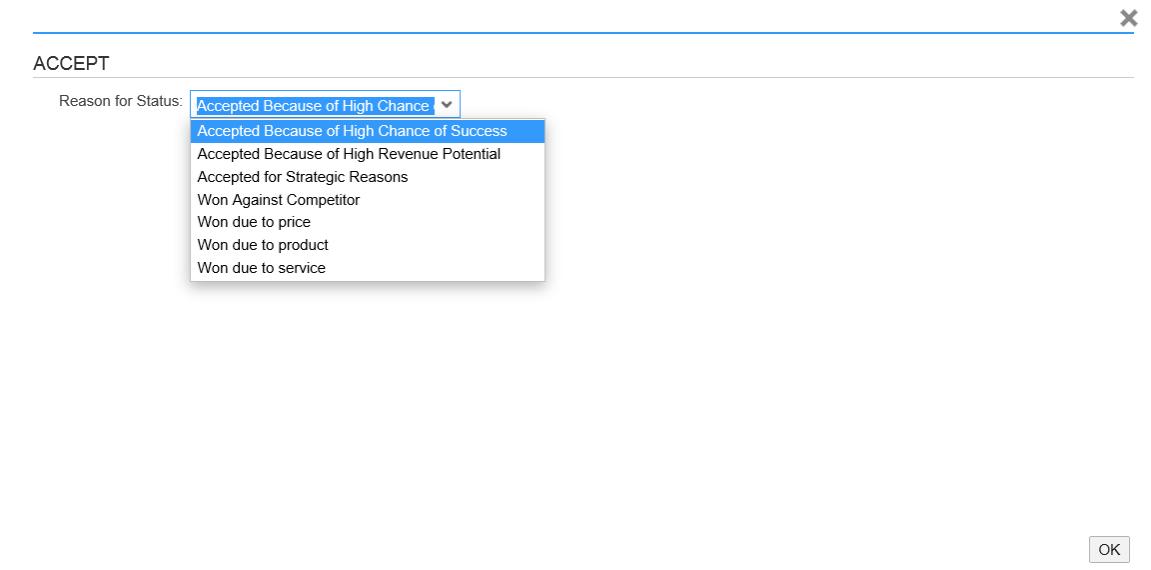
路徑	選單→SALES(銷售)→SALES LEADS(銷售線索)
----	--------------------------------

(三) 操作說明：

1 進入銷售線索後，按右下角 **Actions**，顯示下面選單：



2 點選後，將顯示原因供挑選：



3 狀態將對應更新：

SALES LEAD



测四公司购置电脑

Lead ID: 25083

External ID:

* Name: 测四公司购置电脑

* Account: 测四公司

Primary Contact:

Source: Email

Qualification Level: Cold

Priority: Normal

Status: Accepted

Reason for Status: Accepted for Strategic Reas

Category:

四、維護銷售線索

(一) 作業目的：

修改銷售線索有關產品、聯絡人等資料。

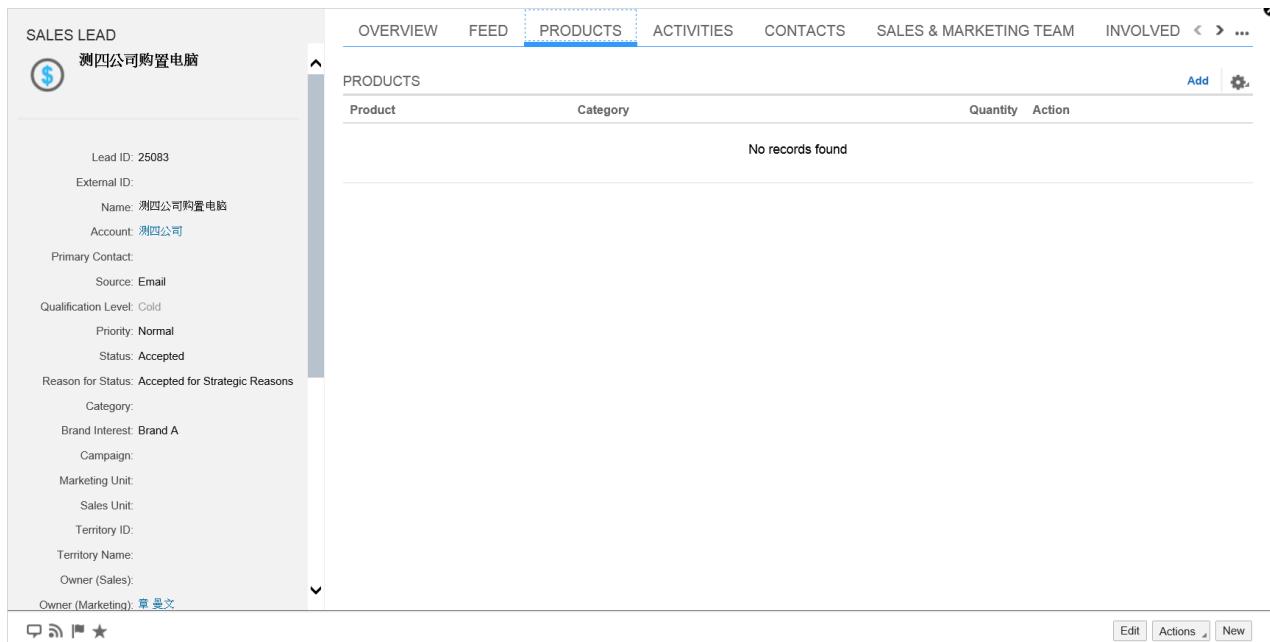
(二) 存取方法：

路徑	選單→SALES(銷售)→SALES LEADS(銷售線索)
----	--------------------------------

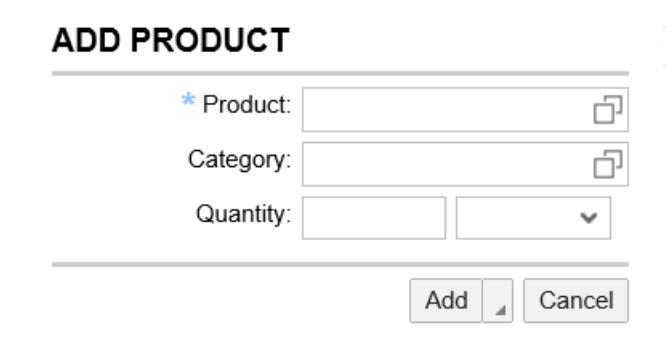
(三) 操作說明：

1 新增潛在客戶欲採購的產品：

1.1 進入銷售線索後，選 PRODUCTS(產品)頁籤：

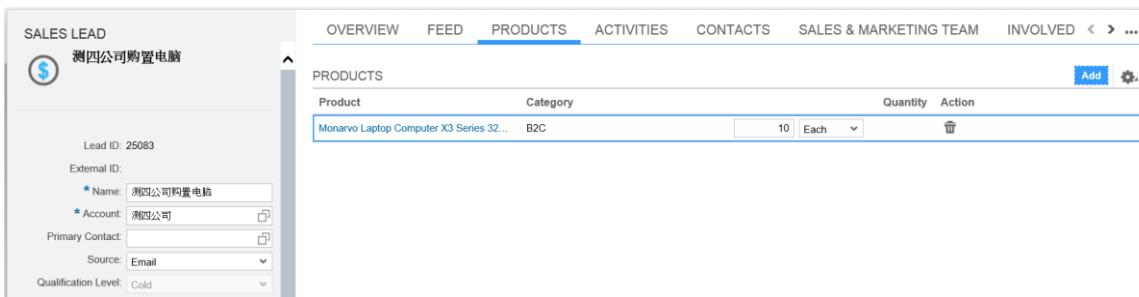


1.2 按 Add ，可新增潛在客戶欲採購的產品：



* Product:	<input type="text"/>	<input type="button" value=""/>
Category:	<input type="text"/>	<input type="button" value=""/>
Quantity:	<input type="text"/>	<input type="button" value=""/>
<input type="button" value="Add"/> <input type="button" value="Cancel"/>		

1.3 按 Add ，即新增至該銷售線索的產品清單中：



SALES LEAD
测四公司购置电脑

Lead ID: 25083
External ID:
* Name: 测四公司购置电脑
* Account: 测四公司
Primary Contact:
Source: Email
Qualification Level: Cold

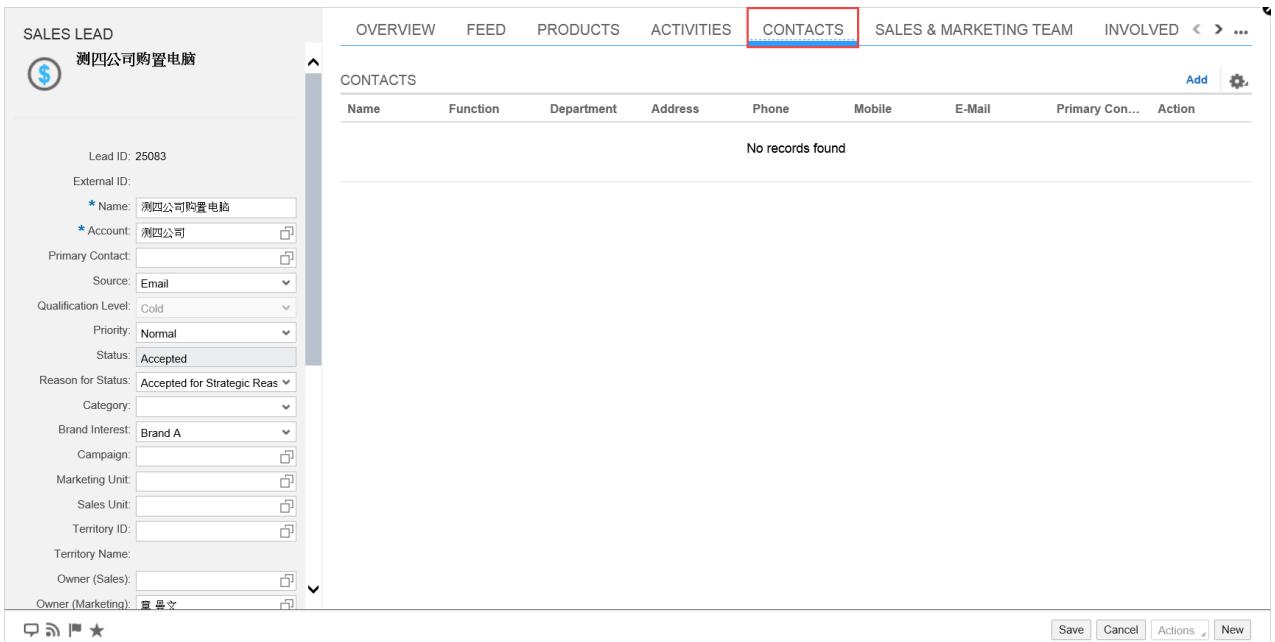
OVERVIEW FEED PRODUCTS ACTIVITIES CONTACTS SALES & MARKETING TEAM INVOLVED < > ...

PRODUCTS

Product	Category	Quantity	Action
Monarvo Laptop Computer X3 Series 32...	B2C	10 Each	

2 新增潛在客戶的聯絡人：(新增銷售線索時，主要聯絡人自動會帶入，其他聯絡人經由此功能引入)

2.1 進入銷售線索後，選 CONTACTS(連絡人)頁籤：



SALES LEAD
测四公司购置电脑

Lead ID: 25083
External ID:
* Name: 测四公司购置电脑
* Account: 测四公司
Primary Contact:
Source: Email
Qualification Level: Cold
Priority: Normal
Status: Accepted
Reason for Status: Accepted for Strategic Reas...
Category:
Brand Interest: Brand A
Campaign:
Marketing Unit:
Sales Unit:
Territory ID:
Territory Name:
Owner (Sales):
Owner (Marketing): 單譽文

OVERVIEW FEED PRODUCTS ACTIVITIES CONTACTS SALES & MARKETING TEAM INVOLVED < > ...

CONTACTS

Name	Function	Department	Address	Phone	Mobile	E-Mail	Primary Con...	Action
No records found								

2.2 按 Add ，可新增聯絡人：

ADD CONTACT

Enter a name that is assigned to the account that is associated with this lead.

Name:

Function:

Department:

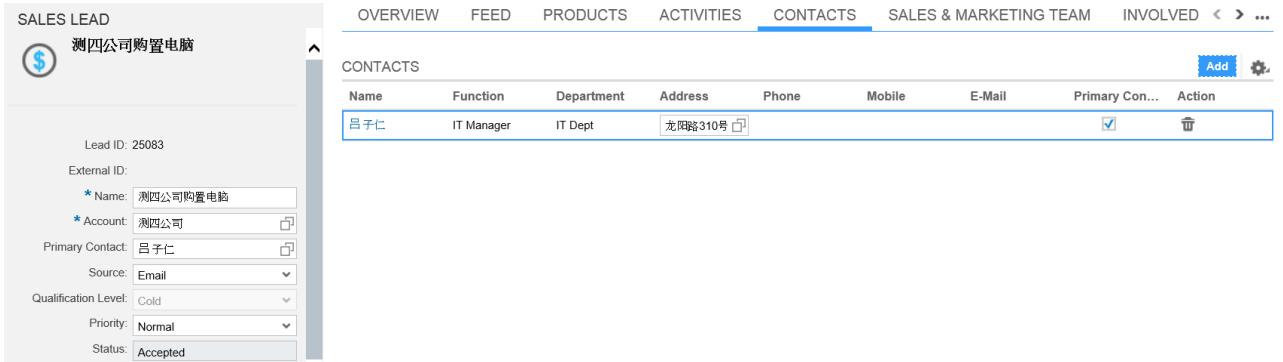
Phone:

Mobile:

E-Mail:

Primary Contact:

2.3 按 ，即新增至該銷售線索的聯絡人清單中：



The screenshot shows the 'SALES LEAD' section for a lead named '测四公司购置电脑'. On the right, the 'CONTACTS' tab is selected, displaying a table of contacts. A new contact, '吕子仁', has been added and is listed in the table. The table columns include Name, Function, Department, Address, Phone, Mobile, E-Mail, Primary Con..., and Action. The 'Primary Con...' column for this contact has a checked checkbox, and the 'Action' column has a trash can icon.

Name	Function	Department	Address	Phone	Mobile	E-Mail	Primary Con...	Action
吕子仁	IT Manager	IT Dept	龙阳路310号				<input checked="" type="checkbox"/>	

五、轉換成機會

(一) 作業目的：

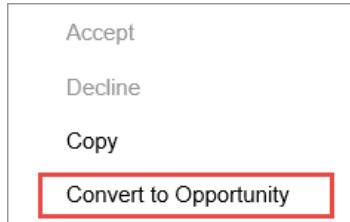
確定銷售線索有商機時，可轉換成機會。

(二) 存取方法：

路徑	選單→SALES(銷售)→SALES LEADS(銷售線索)
----	--------------------------------

(三) 操作說明：

1 進入銷售線索後，按 **Actions**，選 Convert to Opportunity(轉換為機會)：



2 將顯示機會的資料畫面：

New Opportunity

Document Type:	Opportunity
* Name:	测四公司购置电脑
* Account:	测四公司
Primary Contact:	吕子仁
Source:	Email
Expected Value:	0,00 USD
Start Date:	26.09.2014
Close Date:	25.03.2015
Sales Cycle:	General opportunity
Sales Phase:	Identify opportunity
Probability:	10%
Publish to Forecast:	<input type="checkbox"/>
Forecast Category:	Pipeline
Category:	
Campaign:	
* Owner:	章曼文
Territory ID:	
Territory Name:	
Note:	
Sales Organization:	CN1100
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

3 按 **Save** ，狀態將對應更新：

SALES LEAD

测四公司购置电脑



Lead ID: 25083

External ID:

Name: 测四公司购置电脑

Account: 测四公司

Primary Contact: 吕子仁

Source: Email

Qualification Level: Cold

Priority: Normal

Status: **Converted**

Conversion Date: 26.09.2014

Category:

伍、機會管理(BP-C4C-240)

一、機會建立

(一) 作業目的：

當客戶有採購的可能性，欲以系統管理此商機的各階段狀態、可能成交的產品及金額、成交的機率等，即應建立此機會資料。機會可由銷售線索轉換產生，也可直接建立。

(二) 存取方法：

路徑	選單→SALES(銷售)→OPPORTUNITIES(機會)→New 或 選單→CUSTOMERS(客戶)→ACCOUNTS(客戶)→OPPORTUNITIES(機會)→New 或 工具列→ 
----	---

(三) 操作說明：

1 進入後，新增畫面如下：

New Opportunity

Document Type:	Opportunity	^ >
* Name:	测五公司2014/10增购计划	
* Account:	测五公司	
Primary Contact:	陈百万	<input type="button" value=""/>
Source:	<input type="button" value=""/>	
Expected Value:	0,00	USD <input type="button" value=""/>
Start Date:	26.09.2014 <input type="button" value=""/>	
Close Date:	25.03.2015 <input type="button" value=""/>	
Sales Cycle:	General opportunity	
Sales Phase:	Identify opportunity	
Probability:	10%	
Publish to Forecast:	<input type="checkbox"/>	
Forecast Category:	Pipeline	
Category:	<input type="button" value=""/>	
Campaign:	<input type="button" value=""/>	
* Owner:	章曼文	
Territory ID:	<input type="button" value=""/>	
Territory Name:	<input type="button" value=""/>	
Note:	<input type="button" value=""/>	
Sales Organization:	CN1100 <input type="button" value=""/>	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>		

- 1.1 如果由客戶資料的 OPPORTUNITIES(機會)頁籤按 New，Account(客戶)、Primary Contact(主要連絡人)及 Owner(所有者)等欄位值會自動帶出。
- 1.2 Sales Cycle(銷售週期)：企業可針對公司業務從銷售線索開始至結案之間，每一商機可區分為哪些階段、每一階段的成交機率及歷時平均天數作一標準化的定義，由業務人員針對所負責的機會回報目前進度的階段，以確切掌握每一機會的執行狀況及分析。此標準化的各階段組合即為銷售週期。
- 1.3 Sales Phase(銷售階段)：目前進行的銷售階段，可設定 Probability 與 Sales Phase 的對應關係，例如：Identify Opportunity(識別機會)是 10%、Qualify Opportunity(評估銷售機會)是 20%、Develop Value Proposition(開發價值體現)是 40%、Quotation(報價)是 60%、Decision(決策)是 80%、Close(關閉)是 100%。
- 1.4 Publish to Forecast(發佈到預測)：是否將此機會納入預測計算。

二、維護機會

(一) 作業目的：

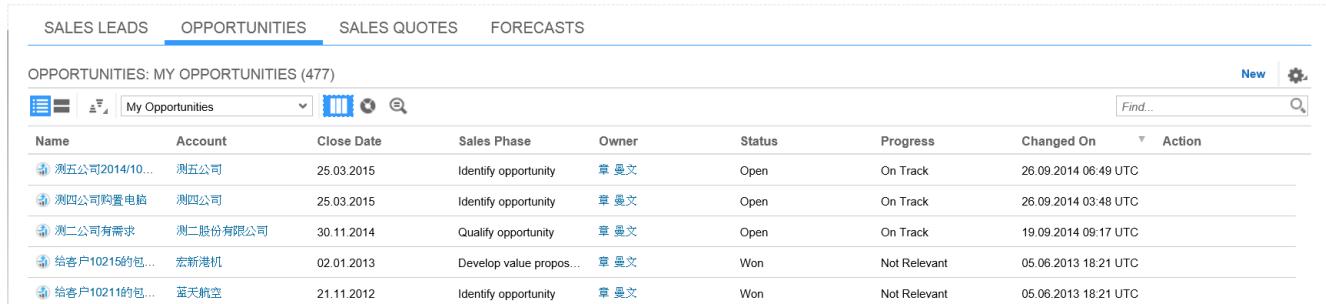
修改機會有關產品、競爭者等資料。

(二) 存取方法：

路徑	選單→SALES(銷售)→OPPORTUNITIES(機會)
----	--------------------------------

(三) 操作說明：

1 進入後，顯示機會清單如下：



Name	Account	Close Date	Sales Phase	Owner	Status	Progress	Changed On	Action
測五公司2014/10...	測五公司	25.03.2015	Identify opportunity	章曼文	Open	On Track	26.09.2014 06:49 UTC	
測四公司购置电脑	測四公司	25.03.2015	Identify opportunity	章曼文	Open	On Track	26.09.2014 03:48 UTC	
測二公司有需求	測二股份有限公司	30.11.2014	Qualify opportunity	章曼文	Open	On Track	19.09.2014 09:17 UTC	
給客戶10215的包...	宏新港机	02.01.2013	Develop value propos...	章曼文	Won	Not Relevant	05.06.2013 18:21 UTC	
給客户10211的包...	蓝天航空	21.11.2012	Identify opportunity	章曼文	Won	Not Relevant	05.06.2013 18:21 UTC	

2 在某機會 Name 上點選可開啟該機會，可按 **Actions** 設定狀態：



3 如要新增潛在客戶欲採購的產品：

3.1 選 PRODUCTS(產品)頁籤：

OPPORTUNITY

测五公司2014/10增购计划

Product	Description	Product...	List Price	Unit	Quantity	Propose...	Negotiat...	Notes	Revenue...	Revenue...	Action
No records found											

Account: 测五公司

Name: 测五公司2014/10增购计划

Primary Contact: 陈百万

Source:

Status: Open

Reason for Status:

Approval Status: Not Started

Sales Cycle: General opportunity

Sales Phase: Identify opportunity

Days in Sales Phase:

Probability: 10%

Expected Value: 0.00 USD

Total Negotiated Va...: 0.00 USD

Weighted Value: 0.00 USD

Start Date: 26.09.2014

* Close Date: 25.03.2015

Publish to Forecast:

Forecast Category: Pipeline

Category:

3.2 按 **Add** , 可新增潛在客戶欲採購的產品 :

PRODUCT

Product:	<input type="button" value="□"/>
Line:	10
Description:	<input type="text"/>
Product Category:	<input type="button" value="□"/>
List Price:	<input type="text"/> <input type="button" value="□"/>
Unit:	<input type="text"/> <input type="button" value="□"/>
Quantity:	<input type="text"/> <input type="button" value="▼"/>
Proposed Value:	0,00 <input type="button" value="USD"/>
Negotiated Value:	0,00 <input type="button" value="USD"/>
Notes:	<input type="text"/>
Start Date:	25.03.2015 <input type="button" value="□"/>
End Date:	25.03.2015 <input type="button" value="□"/>
<input type="button" value="Add"/> <input type="button" value="Cancel"/>	

3.3 按 **Add** , 即新增至該機會的產品清單中 :

OPPORTUNITY

測五公司2014/10增购计划

Product	Descript...	Product...	List Price	Unit	Quantity	Propose...	Negotiat...	Notes	Revenu...	Revenu...	Action
Computer	Computer F	B2C			10 E	0,00 USD	800 L		25.03.2014	25.03.2014	Add Edit

NOTES

4 如果要新增機會的競爭者：

4.1 選 COMPETITORS(競爭對手)頁籤：

OPPORTUNITY

測五公司2014/10增购计划

Name	City	Web Site	Classification	Status	Main	Action
No records found						

COMPETITORS

4.2 按 **Add**，可新增此機會的競爭者：

COMPETITOR

Role: Competitor

Name:

City:

Web Site:

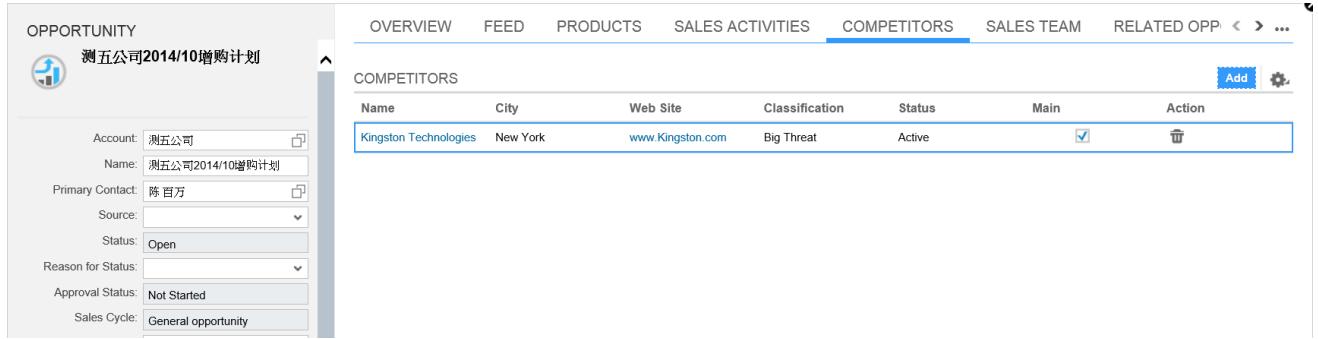
Classification:

Status:

Main:

[Add](#) [Cancel](#)

4.3 按 **Add** ，即新增至該機會的競爭者清單中：



The screenshot shows the Innatech CRM interface for managing opportunities. On the left, there's a sidebar with various filters and search fields. The main area has tabs for Overview, Feed, Products, Sales Activities, Competitors (which is currently selected), Sales Team, and Related Opps. Below the tabs is a section titled 'COMPETITORS' with a table. The table has columns for Name, City, Web Site, Classification, Status, Main, and Action. One row is visible, showing 'Kingston Technologies' from 'New York' with 'www.Kingston.com' as the web site, 'Big Threat' as the classification, and 'Active' as the status. There is a checked checkbox under 'Main' and a trash can icon under 'Action'.

Name	City	Web Site	Classification	Status	Main	Action
Kingston Technologies	New York	www.Kingston.com	Big Threat	Active	<input checked="" type="checkbox"/>	

三、機會簽核

(一) 作業目的：

如果機會設有簽核的機制，且符合簽核的條件時，將需由主管簽核。

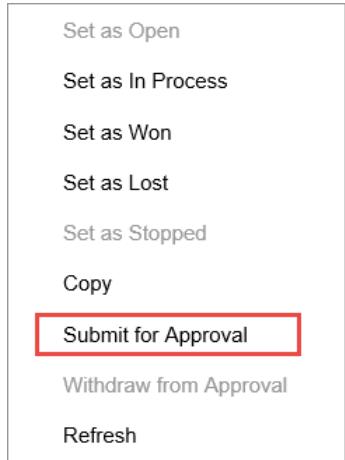
(二) 存取方法：

路徑	選單→SALES(銷售)→OPPORTUNITIES(機會)
----	--------------------------------

(三) 操作說明：

1 系統可以設定自動送簽或人工送簽，如果是人工送簽時，開啟機會後，按 **Actions** :

1.1 選擇 Submit for Approval(提交審批)：



1.2 送簽前，可輸入文字說明：

Send for Approval	X
此為新聞發客戶，本月有購置計劃	
NOTES HISTORY	

OK Cancel

1.3 送簽後，Approval Status(審批狀態)將對應更新：

OPPORTUNITY



忠孝資訊2014/10購置電...

Account: [忠孝資訊](#)

Name: 忠孝資訊2014/10購置電腦設備

Primary Contact: [李任行](#)

Source:

Status: Open

Reason for Status:

Approval Status: In Approval

Sales Cycle: General opportunity

Sales Phase: Identify opportunity

Days in Sales Phase:

Probability: 10%

Expected Value: 10,000.00 USD

Total Negotiated Va... 0.00 USD

Weighted Value: 1,000.00 USD

Start Date: 2014.10.02

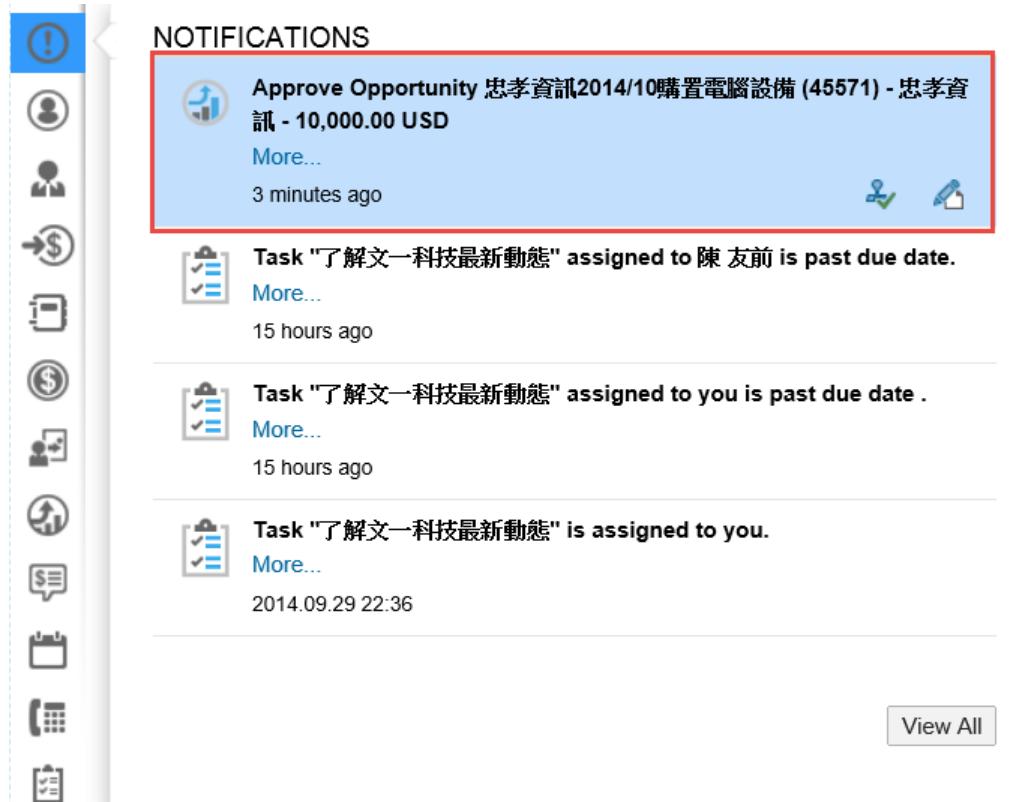
Close Date: 2015.03.31

1.4 送簽後，按 **Actions** ，也可撤簽(撤出審批)：

- Set as Open
- Set as In Process
- Set as Won
- Set as Lost
- Set as Stopped
- Copy
- Submit for Approval
- Withdraw from Approval**
- Refresh

2 管理簽核作業：

2.1 登入系統後，將會收到待簽核的通知：

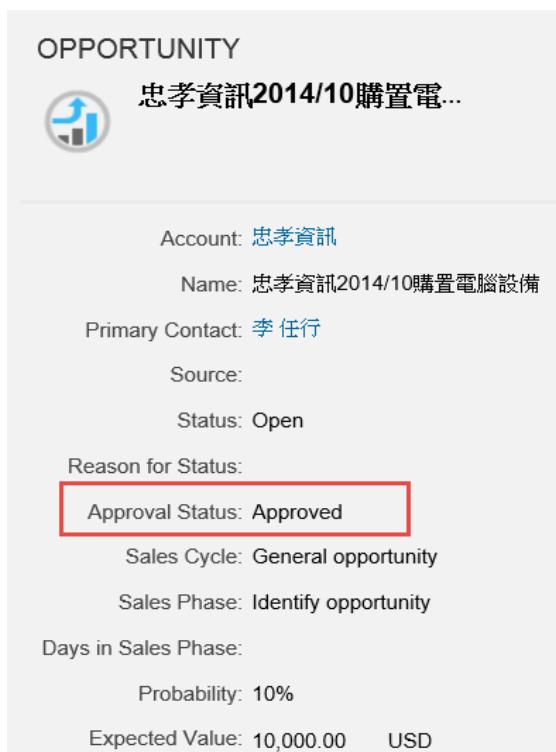


NOTIFICATIONS

- Approve Opportunity 忠孝資訊2014/10購置電腦設備 (45571) - 忠孝資訊 - 10,000.00 USD**
[More...](#)
 3 minutes ago  
- Task "了解文一科技最新動態" assigned to 陳友前 is past due date.**
[More...](#)
 15 hours ago
- Task "了解文一科技最新動態" assigned to you is past due date .**
[More...](#)
 15 hours ago
- Task "了解文一科技最新動態" is assigned to you.**
[More...](#)
 2014.09.29 22:36

[View All](#)

2.2 可按  核准該機會。如果查詢該機會，Approval Status(審批狀態)將對應更新：



OPPORTUNITY

忠孝資訊2014/10購置電...

Account: 忠孝資訊

Name: 忠孝資訊2014/10購置電腦設備

Primary Contact: 李任行

Source:

Status: Open

Reason for Status:

Approval Status: **Approved**

Sales Cycle: General opportunity

Sales Phase: Identify opportunity

Days in Sales Phase:

Probability: 10%

Expected Value: 10,000.00 USD

2.3 按  可駁回申請，要求修改該機會資料。如果查詢該機會，Approval Status(審批狀態)將對應更新：

OPPORTUNITY

 忠孝資訊2014/11購置電...

Account: 忠孝資訊

Name: 忠孝資訊2014/11購置電腦設備

Primary Contact: 李任行

Source:

Status: Open

Reason for Status:

Approval Status: In Revision

Sales Cycle: General opportunity

Sales Phase: Identify opportunity

Days in Sales Phase:

Probability: 10%

Expected Value: 20,000.00 USD

四、銷售階段回報

(一) 作業目的：

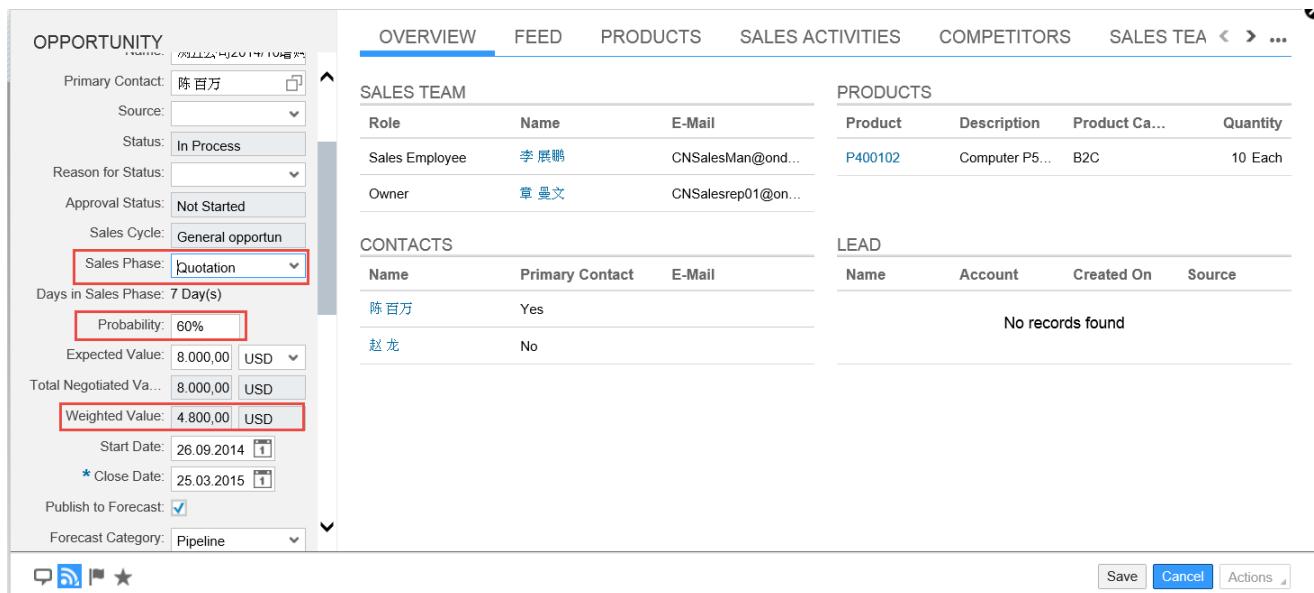
企業可針對公司業務從銷售線索開始至結案之間，每一商機可區分為哪些階段、每一階段的成交機率及歷時平均天數作一標準化的定義，要求業務人員針對所負責的機會回報目前進度的階段，以確切掌握每一機會的執行狀況及分析。

(二) 存取方法：

路徑	選單→SALES(銷售)→OPPORTUNITIES(機會)
----	--------------------------------

(三) 操作說明：

1 在某機會 Name(名稱)上點選可開啟該機會，按 **Edit** :



- 1.1 在 Sales Phase(銷售階段)輸入目前的進行階段
- 1.2 Probability(概率)：會根據後檯設定，帶出 Sales Phase 對應的成交機率。
- 1.3 Weighted Value(加權價值)：根據 Expected Value(預期價值) * Probability(概率)算出，可提供分析報表使用。

2 如果機會已確定失敗，應按 **Actions** :

- 2.1 選 Set as Lost(設為已失去)：

Set as Open

Set as In Process

Set as Won

Set as Lost

Set as Stopped

Copy

Refresh

2.2 Status(狀態)及 Probability(概率)將對應更新：

OPPORTUNITY

测五公司2014/10增购计划

Account: 测五公司

Name: 测五公司2014/10增购计划

Primary Contact: 陈百万

Source:

Status: Lost

Reason for Status:

Approval Status: Not Started

Sales Cycle: General opportunity

Sales Phase: Quotation

Days in Sales Phase: 7 Day(s)

Probability: 0%

2.3 按 **Edit** ，輸入 Reason for Status(狀態原因)，戰勝戰敗原因，可作日後分析使用，最後

按 **Save** :

OPPORTUNITY



测五公司2014/10增...

Account: 测五公司

Name: 测五公司2014/10增购

Primary Contact: 陈百万

Source:

Status: Lost

Reason for Status: Lost due to produ

Approval Status: Not Started

Sales Cycle: General opportun

Sales Phase: Quotation

Days in Sales Phase: 7 Day(s)

Probability: 0%

五、機會分析報表

(一) 作業目的：

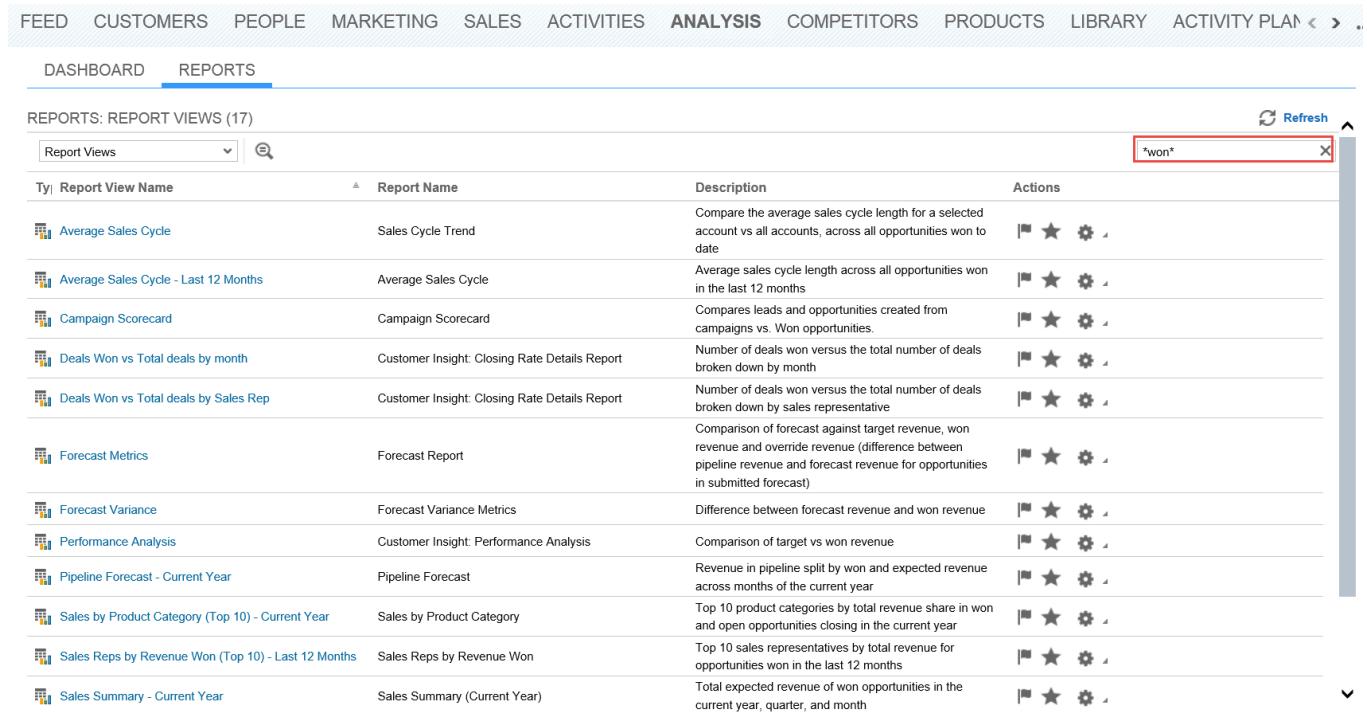
可查詢及分析。

(二) 存取方法：

路徑	選單→ANALYSIS(分析)→REPORTS(報表)
----	-----------------------------

(三) 操作說明：

1 在搜尋欄輸入*won*或*win*(贏)，按 Enter，搜尋與機會戰勝分析相關的報表：



The screenshot shows a software interface with a navigation bar at the top containing links: FEED, CUSTOMERS, PEOPLE, MARKETING, SALES, ACTIVITIES, ANALYSIS (which is highlighted in blue), COMPETITORS, PRODUCTS, LIBRARY, and ACTIVITY PLAN. Below the navigation bar is a search bar with the placeholder "REPORT VIEWS (17)". To the right of the search bar is a red-bordered input field containing the text "*won*". The main area displays a table of report views, each with a thumbnail icon, report name, description, and actions (represented by icons for edit, delete, and other operations). The reports listed include various sales cycle trends, campaign scorecards, deal comparisons, forecast metrics, and performance analysis.

Type	Report View Name	Report Name	Description	Actions
	Average Sales Cycle	Sales Cycle Trend	Compare the average sales cycle length for a selected account vs all accounts, across all opportunities won to date	
	Average Sales Cycle - Last 12 Months	Average Sales Cycle	Average sales cycle length across all opportunities won in the last 12 months	
	Campaign Scorecard	Campaign Scorecard	Compares leads and opportunities created from campaigns vs. Won opportunities.	
	Deals Won vs Total deals by month	Customer Insight: Closing Rate Details Report	Number of deals won versus the total number of deals broken down by month	
	Deals Won vs Total deals by Sales Rep	Customer Insight: Closing Rate Details Report	Number of deals won versus the total number of deals broken down by sales representative	
	Forecast Metrics	Forecast Report	Comparison of forecast against target revenue, won revenue and override revenue (difference between pipeline revenue and forecast revenue for opportunities in submitted forecast)	
	Forecast Variance	Forecast Variance Metrics	Difference between forecast revenue and won revenue	
	Performance Analysis	Customer Insight: Performance Analysis	Comparison of target vs won revenue	
	Pipeline Forecast - Current Year	Pipeline Forecast	Revenue in pipeline split by won and expected revenue across months of the current year	
	Sales by Product Category (Top 10) - Current Year	Sales by Product Category	Top 10 product categories by total revenue share in won and open opportunities closing in the current year	
	Sales Reps by Revenue Won (Top 10) - Last 12 Months	Sales Reps by Revenue Won	Top 10 sales representatives by total revenue for opportunities won in the last 12 months	
	Sales Summary - Current Year	Sales Summary (Current Year)	Total expected revenue of won opportunities in the current year, quarter, and month	

2 例如選Deals Won vs Total deals by month：

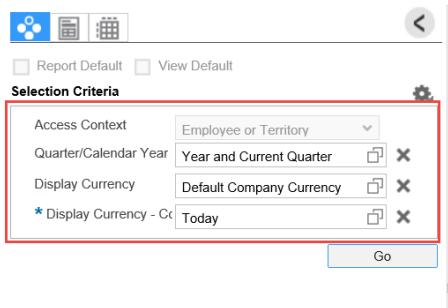
2.1 顯示查詢條件的輸入畫面，可指定年度及幣別：

Customer Insight: Closing Rate Details Report

View : **Deals Won vs Total deals by month**

Selection : **Initial**

You can customize the view by selecting from available chart options. Expand the left panel in order to further narrow down the criteria or select a present view or selection at top.



Selection Criteria

- Access Context: Employee or Territory
- Quarter/Calendar Year: Year and Current Quarter
- Display Currency: Default Company Currency
- * Display Currency - C: Today

Go

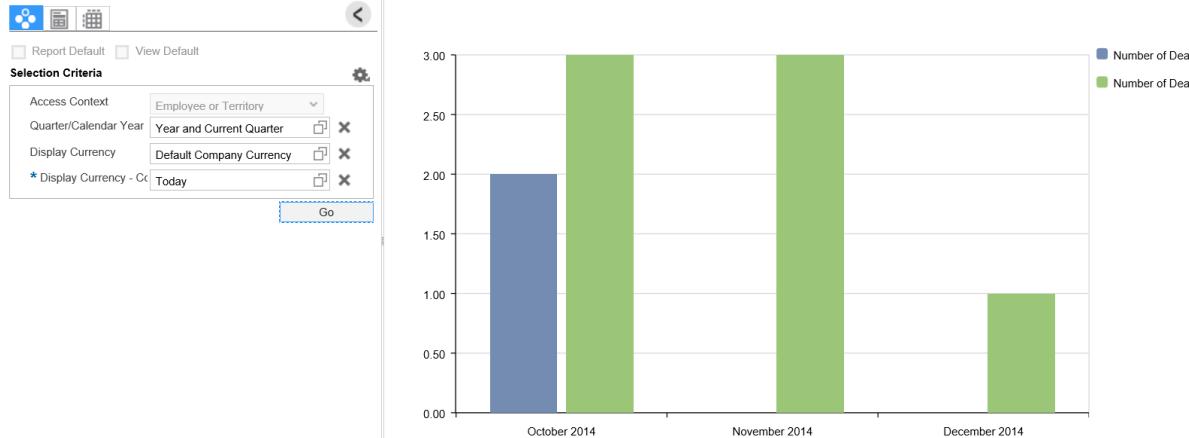
2.2 條件輸入完成後，按 **Go**，系統顯示查詢的結果：

Customer Insight: Closing Rate Details Report

View : **Deals Won vs Total deals by month**

Selection : **Initial**

You can customize the view by selecting from available chart options. Expand the left panel in order to further narrow down the criteria or select a present view or selection at top.



3 例如選 **Win/Loss Reason - Last 12 Months** :

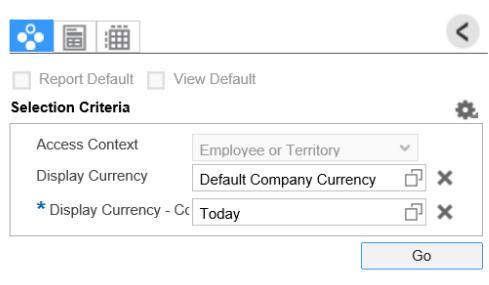
3.1 顯示查詢條件的輸入畫面，可指定幣別：

Opportunity Win/Loss Analysis

View : **Win/Loss Reason - Last 12 Months**

Selection : **Initial**

You can customize the view by selecting from available chart options. Expand the left panel in order to further narrow down the criteria or select a present view or selection at top.



Selection Criteria

- Access Context: Employee or Territory
- Display Currency: Default Company Currency
- * Display Currency - C: Today

Go

3.2 條件輸入完成後，按 **Go** ，系統顯示查詢的結果：

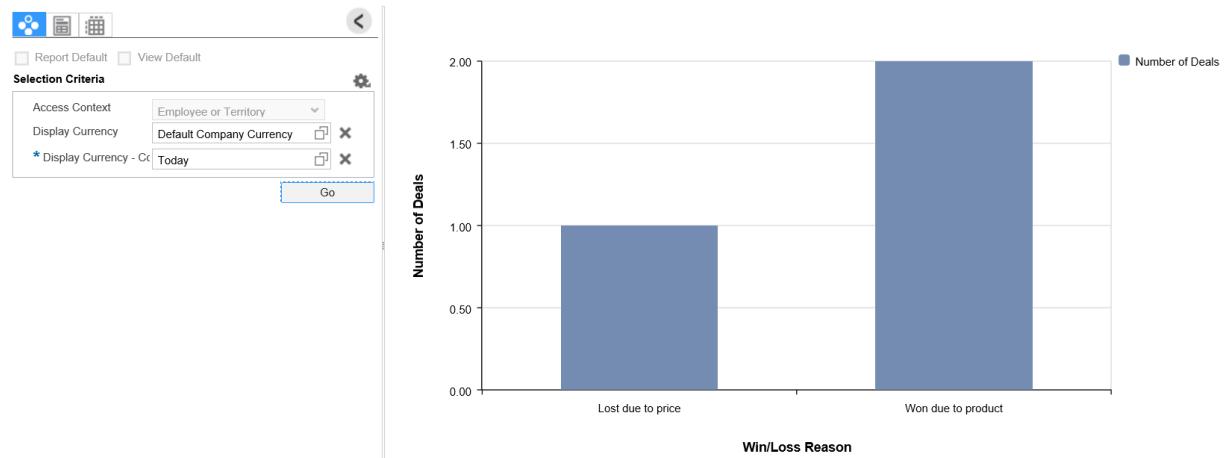
Opportunity Win/Loss Analysis

View : **Win/Loss Reason - Last 12 Months**

Selection : **Initial**



You can customize the view by selecting from available chart options. Expand the left panel in order to further narrow down the criteria or select a present view or selection at top.



陸、報價管理(BP-C4C-250)

一、從機會建立報價

(一) 作業目的：

在銷售循環中，針對某些機會建立報價，以掌握各機會的狀況。

(二) 存取方法：

路徑	選單→SALES(銷售)→OPPORTUNITIES(機會)→Sales Documents(銷售單據)頁籤
----	--

(三) 操作說明：

- 按 **New**，可新增報價資料：

New Quote

* Account:	測五公司	<input type="button" value=""/>
Primary Contact:	陈百万	<input type="button" value=""/>
External Reference:	<input type="text"/>	
Date:	02.10.2014	<input type="button" value=""/>
* Payment Terms:	<input type="text"/>	
Valid To:	04.10.2014	<input type="button" value=""/>
Owner:	章曼文	<input type="button" value=""/>
Sales Unit:	Sales Unit CN	<input type="button" value=""/>
Internal Notes:	<input type="text"/>	

PRODUCTS [Add](#) 

Product ID	Description	Quantity	Actions
P400102	Computer P5	10	ea <input type="button" value=""/>

- 如果在機會資料已建立產品資料，將會帶出。如有不足，可按 **Add** 新增產品空白行。
- 存檔後，將會列示在該機會報價清單中：

OPPORTUNITY

测五公司2014/10增购计划

Account: 测五公司	External Reference	Date	Owner
Name: 测五公司2014/10增购计划	414 - 测五公司2014/10增购计划	02.10.2014 UTC	章曼文

Primary Contact: 陈百万

Source:

Status: In Process

Reason for Status:

- Approval Status: Not Started
- Sales Cycle: General opportunity
- Sales Phase: Quotation
- Days in Sales Phase: 6 Day(s)
- Probability: 60%
- Expected Value: 8.000,00 USD
- Total Negotiated Va... 8.000,00 USD
- Weighted Value: 4.800,00 USD
- Start Date: 26.09.2014
- Close Date: 25.03.2015
- Publish to Forecast:
- Forecast Category: Pipeline
- Category:

Processes: On Track

二、單獨建立報價

(一) 作業目的：

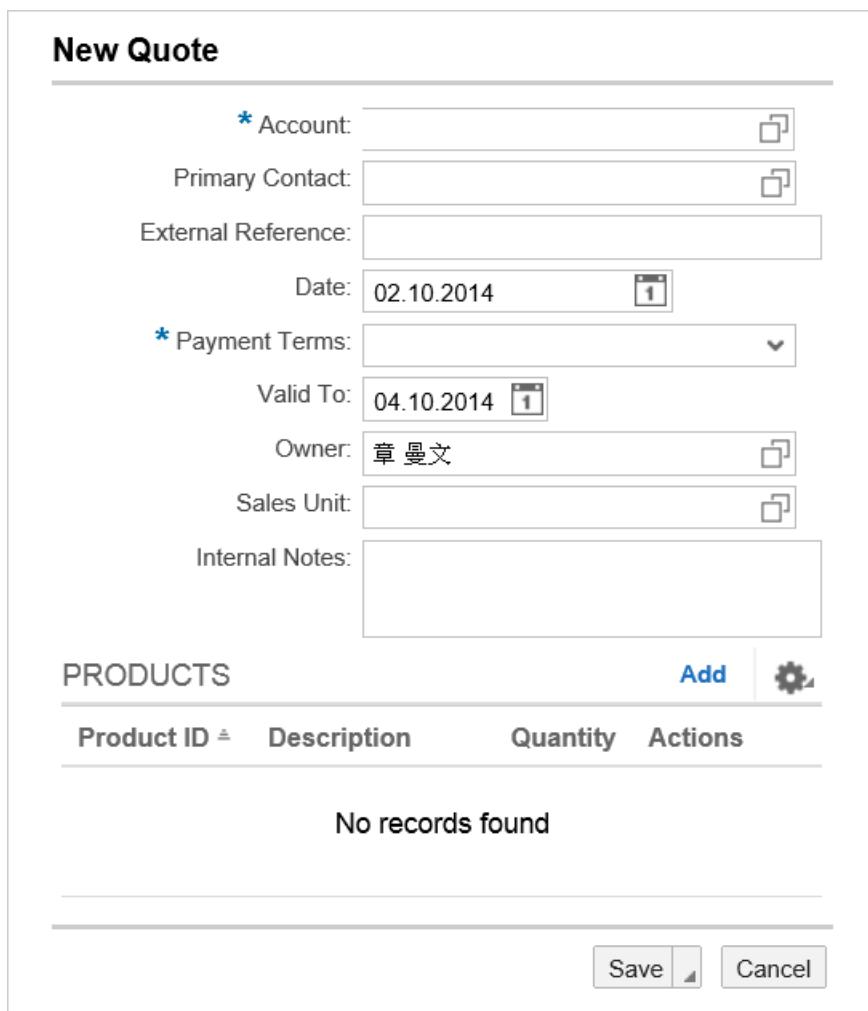
沒有參考來源機會，也可單獨建立報價。

(二) 存取方法：

路徑	選單→SALES(銷售)→SALES QUOTES(銷售報價) 或 工具列→ 
----	---

(三) 操作說明：

1 按 **New**，可新增報價資料：



New Quote

* Account: 

Primary Contact: 

External Reference:

Date: 02.10.2014 

* Payment Terms: 

Valid To: 04.10.2014 

Owner: 章 曼文 

Sales Unit: 

Internal Notes:

PRODUCTS  

Product ID	Description	Quantity	Actions
No records found			

Save  **Cancel** 

1.1 因無資料來源，需按 **Add** 新增產品空白行，再輸入產品代號及數量：

Products				Add	Settings
Product ID	Description	Quantity	Actions		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="▼"/>		

2 存檔後，新建立的報價將會列示在報價清單中：

FEED	CUSTOMERS	PEOPLE	MARKETING	SALES	ACTIVITIES	ANALYSIS	COMPETITORS	PRODUCTS	LIBRARY	ACTIVITY PLAN	<	>	...
Sales Pipeline Overview													
Sales Leads		Opportunities		Sales Quotes		Forecasts		Recent Activity					
QUOTES: MY OPEN QUOTES (3)													
			My Open Quotes				Find...						
ID	Progress	Status	External Refer...	Account	Primary Contact	Date	Valid To	Total	Owner	Actions			
416	Not Relevant	Open		测二股份有限公司	张三丰	02.10.2014	24.10.2014	1.000,00 USD	覃曼文				
414	Not Relevant	Open		测五公司	陈百万	02.10.2014	31.10.2014	0,00 USD	覃曼文				
381	Not Relevant	Open		永遠科技		22.09.2014	24.09.2014	16,96 USD	覃曼文				

3 點選報價 ID，可開啟該報價單：

3.1 OVERVIEW(總覽)頁籤顯示報價的概觀。如欲維護各區塊資料，需至對應的頁籤中修改：

3.2 PRODUCTS(產品)頁籤顯示報價單的產品清單，可在此維護價格：

SALES QUOTE

416

OVERVIEW PRODUCTS INVOLVED PARTIES SALES DOCUMENTS ATTACHMENTS PRICING AF < > ...

Line	Product	Description	Price	Price Unit	Quantity	Discount (%)	Item Value	Action	Color
10	P400105	Monarvo笔记本	1.000	US	1	ea	1	ea	

EXTERNAL NOTE

INTERNAL NOTE

ATTACHMENTS

Add

Title	Type	Changed On	Changed By	Actions

Save **Cancel** **Actions**

3.3 INVOLVED PARTIES(相關方)預設會根據系統設定帶出與報價單有關的對象，例如：
送貨對象、發票對象、收款對象等，可再由人工調整：

SALES QUOTE

416

OVERVIEW PRODUCTS INVOLVED PARTIES SALES DOCUMENTS ATTACHMENTS PRICING AF < > ...

INVOLVED PARTIES

Role	Name	Address	E-Mail	Phone	Main	Action
Account	測二股份有限公司	上海 / CN			<input checked="" type="checkbox"/>	
Owner	章曼文	金桥路100号 / 上海	CNSalesrep01@ond...	+86 21 63751282	<input checked="" type="checkbox"/>	
Bill-To	測二股份有限公司	上海 / CN			<input checked="" type="checkbox"/>	
Ship-To	測二股份有限公司	上海 / CN			<input checked="" type="checkbox"/>	
Payer	測二股份有限公司	上海 / CN			<input checked="" type="checkbox"/>	

CONTACTS

Name	Address	E-Mail	Phone	Main	Action
张三丰	上海 / CN			<input checked="" type="checkbox"/>	

Add

Save **Cancel** **Actions**

三、報價簽核

(一) 作業目的：

如果報價設有簽核的機制，且符合簽核的條件時，將需由主管簽核。

(二) 存取方法：

路徑	選單→SALES(銷售)→SALES QUOTES(銷售報價)
----	---------------------------------

(三) 操作說明：

1 系統可以設定自動送簽或人工送簽，如果是人工送簽時，開啟報價後，按 **Actions** :

1.1 選擇 Submit :

Submit
Create External Follow-up Document
Set as Won
Set as Lost
Set as Pending
Copy
Preview
Edit Output Settings

1.2 送簽後，Approval Status(審批狀態)將對應更新

SALES QUOTE



123 - 忠孝資訊 2014/10 購...

Progress: Not Relevant

Delivery Priority: Normal

Account: 忠孝資訊

Primary Contact: 李任行

External Reference:

Ticket:

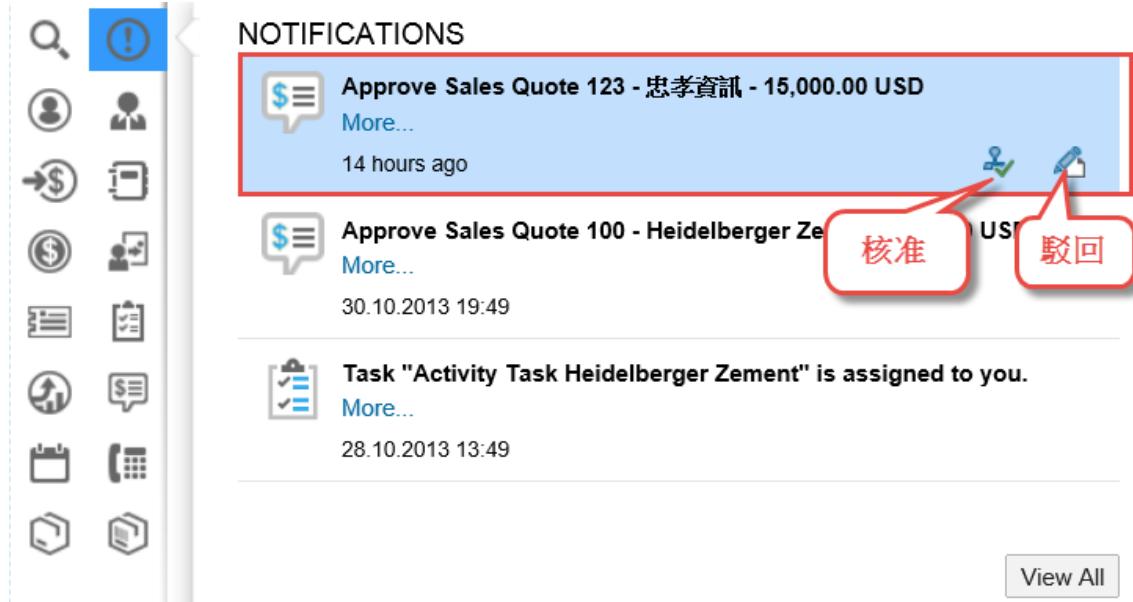
Status: Open

Approval Status: In Approval

Reason for Rejection:

2 管理簽核作業：

2.1 登入系統後，將會收到待簽核的通知：



2.2 可按  核准該報價。如果查詢該報價，Approval Status(審批狀態)將對應更新：



SALES QUOTE

 123 - 忠孝資訊 2014/10 購置電腦設備

Progress: Pending

Delivery Priority: Normal

Account: 忠孝資訊

Primary Contact: 李任行

External Reference:

Ticket:

Status: Open

Approval Status: **Approved**

Reason for Rejection:

Description: 忠孝資訊 2014/10 購置電腦設備

2.3 按  可駁回申請，要求修改該報價資料。如果查詢該報價，Approval Status(審批狀態)將對應更新：

SALES QUOTE



123 - 忠孝資訊2014/10購...

Progress: Not Relevant

Delivery Priority: Normal

Account: [忠孝資訊](#)

Primary Contact: [李任行](#)

External Reference:

Ticket:

Status: Open

Approval Status: In Revision

Reason for Rejection:

Description: 忠孝資訊2014/10購置電腦設備

柒、銷售績效管理(BP-C4C-260)

一、預測輸入

(一) 作業目的：

輸入各期間的機會預測金額。

(二) 存取方法：

路徑	選單→SALES(銷售)→FORECASTS(預測)
----	----------------------------

(三) 操作說明：

1 按 **New**，可新增預測資料：

New Forecast

* Name:	<input type="text"/>	
* Sales Unit:	Sales Unit CN	
* Owner:	李雪梅	
* Currency:	USD - US Dollar	
* From Year-Month:	2014	October
* To Year-Month:	2014	December
* Level:	Opportunity Forecast	
Source:	Opportunity Expected Revenue	

2 新增後，顯示在清單中：

FEED	CUSTOMERS	PEOPLE	MARKETING	SALES	ACTIVITIES	ANALYSIS	COMPETITORS	PRODUCTS	LI < > ...	
SALES LEADS OPPORTUNITIES SALES QUOTES FORECASTS										
FORECASTS: MY FORECASTS (1)										
<input type="button" value="New"/>	<input type="button" value="Find..."/>	<input type="button" value="Settings"/>								
Name	From	To	Level	Status	Owner	Sales Unit	Revenue	Latest Vers...	Data	Action
2014/Q4...	2014-10	2014-12	Product Fore...	In Preparation	李雪梅	Sales Unit CN	20.000...	USD	VERSION1	<input type="button" value="Edit"/>

3 點選名稱，可開啟該筆預測資料：

FORECAST

2014/Q4 Product Forecast

Name: 2014/Q4 Product Forecast
Owner: 李雪梅
Sales Unit: Sales Unit CN
Currency: USD
From Year-Month: 2014 October
To Year-Month: 2014 December
Status: In Preparation
Level: Product Forecast
Source: Opportunity Product Revenue

VERSIONS

ID	Active	Revenue	Submitted On	Created On	Data	Action
VERSION1	■	20.000,00	30.09.2014 07:50 UTC			

OPPORTUNITIES

VERSOPN

OPPORTUNITIES

DATA

Actions

3.1 欲輸入預測資料，應按 Data 欄的 :

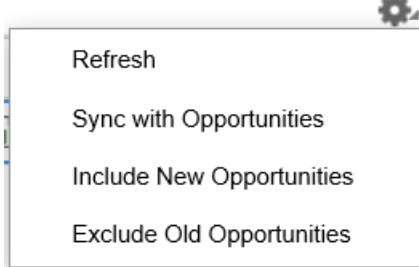
3.1.1 需使用 Excel 輸入資料 (需先安裝 Add-In for Microsoft Excel®) :

Sales Forecast													Calendar Year/Month	10.2014	11.2014
Sales Unit	Sales Unit (Key)	Employee Responsible	Employee Responsible (Key)	Account	Account (Key)	Opportunity	Opportunity (Key)	Product	Product (Key)	Product Category	Product Category (Key)	Forecast Amount	Forecast Amount		
Sales Unit CN	CN1100	李雪梅	E1148	智能系统有限公司	10208	智能系统201411采购计划	46416	Not assigned #	Not assigned #	Not assigned #	Not assigned #	200,000,00 USD			
				远新能源	10210	远新能源2014/10采购计划	46414	Not assigned #	Not assigned #	Not assigned #	Not assigned #	30,000,00 USD			

3.1.2 建妥資料後，可按鈕更新主機資料：

SAP Cloud for Customer															
SAP Cloud for Customer															
全部保存	公用工作簿	插入报表	复制报表	粘贴报表	上传	输入	延迟刷新	刷新	选择	标记	插入表头	导航	插入图表	网格显示	设置
全部保存	公用工作簿	插入报表	复制报表	粘贴报表	上传	输入	延迟刷新	刷新	选择	标记	插入表头	导航	插入图表	网格显示	设置
保存工作簿	保存工作簿	保存计划数据	保存工作簿另存为新												

3.2 開啟預測資料後，也可按 ，與 Opportunities 同步更新、引入新的 Opportunities 或移除舊的 Opportunities：



4 最後確認預測後，應按 **Actions**，選 Submit，送交主管，狀態對應更新：

FORECAST

2014/Q4 Product Forecast

Name: 2014/Q4 Product Forecast

Owner: 李雪梅

Sales Unit: Sales Unit CN

Currency: USD

From Year-Month: 2014 October

To Year-Month: 2014 December

Status: **Submitted**

Level: Product Forecast

Source: Opportunity Product Revenue

4.1 主管會收到 Submit 預測的通知：

The screenshot shows the SAP JAM FEED interface. On the left is a vertical sidebar with icons for Home, Calendar (14), Search, Notifications (highlighted in blue), and User. The main area has tabs for 'FEED' and 'SAP JAM FEED'. Below the tabs is a placeholder 'Post an Update ...' with a user icon. A red box highlights the 'NOTIFICATIONS' section, which contains a message from a user named 'Sales Forecast 2014/Q4 Product Forecast submitted with a new version' posted '5 minutes ago'.

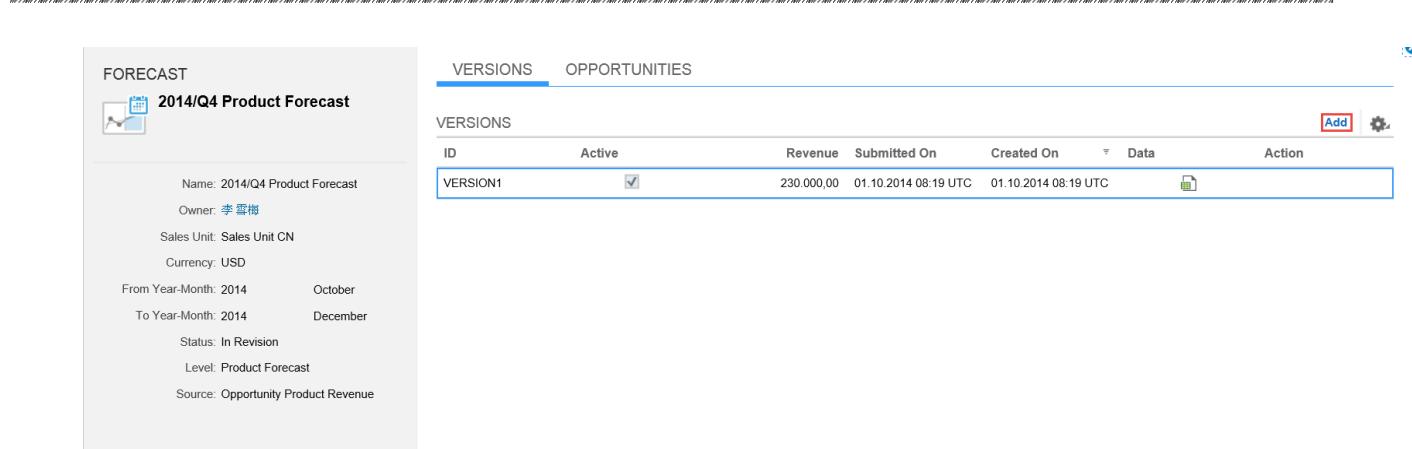
4.2 主管如果覺得預測內容需再作調整，應按 **Actions**，選 Revise，狀態對應更新：

The screenshot shows the details of the '2014/Q4 Product Forecast'. The forecast name is '2014/Q4 Product Forecast', owned by '李雪梅', and is associated with 'Sales Unit CN' and 'USD' currency. The forecast period is set from '2014 October' to '2014 December'. The status is highlighted with a red box and is 'In Revision'. The forecast level is 'Product Forecast' and the source is 'Opportunity Product Revenue'.

Name:	2014/Q4 Product Forecast
Owner:	李雪梅
Sales Unit:	Sales Unit CN
Currency:	USD
From Year-Month:	2014 October
To Year-Month:	2014 December
Status:	In Revision
Level:	Product Forecast
Source:	Opportunity Product Revenue

5 業務人員調整預測：

5.1 開啟預測資料後，按 **Add**：



The screenshot shows a 'FORECAST' section on the left with details for '2014/Q4 Product Forecast'. On the right, there are two tabs: 'VERSIONS' (selected) and 'OPPORTUNITIES'. The 'VERSIONS' tab displays a table with one row:

ID	Active	Revenue	Submitted On	Created On	Data	Action
VERSION1	<input checked="" type="checkbox"/>	230.000,00	01.10.2014 08:19 UTC	01.10.2014 08:19 UTC		

5.2 系統供使用者確認是否確定要新增版本：

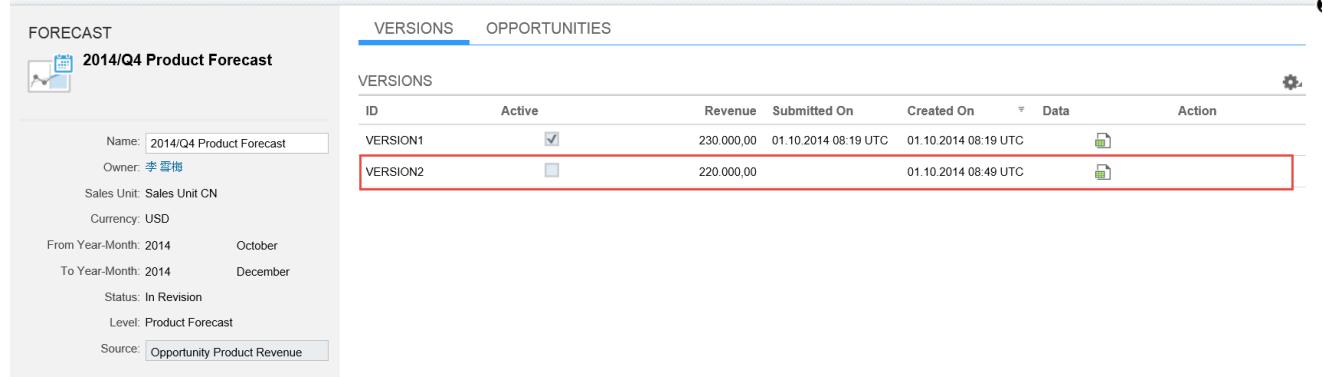


NEW VERSION

ID: VERSION2

Add  Cancel

5.3 按 **Add ** 後，清單中會複製前一版本，產生新版本，供輸入：



The screenshot shows the same forecast creation screen as before. On the right, the 'VERSIONS' tab is selected, showing two rows in the table:

ID	Active	Revenue	Submitted On	Created On	Data	Action
VERSION1	<input checked="" type="checkbox"/>	230.000,00	01.10.2014 08:19 UTC	01.10.2014 08:19 UTC		
VERSION2	<input type="checkbox"/>	220.000,00		01.10.2014 08:49 UTC		

5.4 修改完成，應再次按 **Actions ** ，選 Submit，送交主管。

二、銷售目標計劃

(一) 作業目的：

輸入銷售目標金額，可供日後與機會數值等分析比較。

(二) 存取方法：

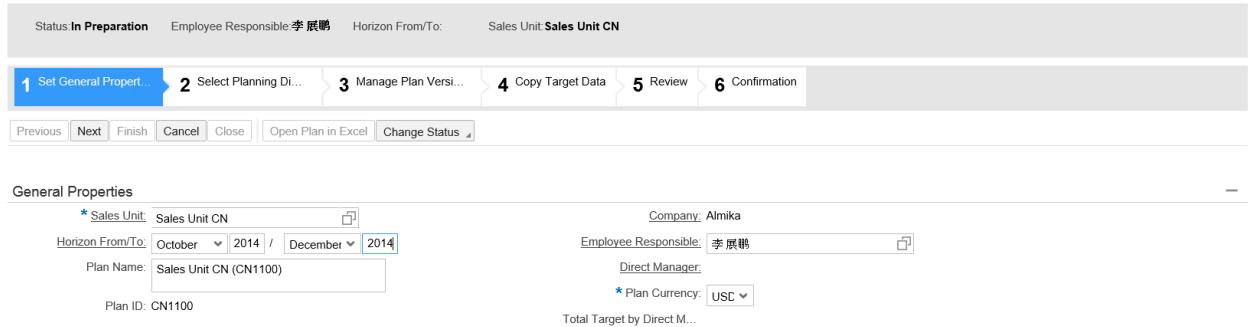
路徑	選單→SALES(銷售)→SALES TARGET PLANNING(銷售目標計劃)
----	--

(三) 操作說明：

1 按 **New**，可新增銷售目標計劃資料，共六個步驟：

1.1 步驟一是 Set General Properties(設置一般屬性)，即輸入計劃的組織、期間起迄、負責人及幣別：

New Sales Target Plan

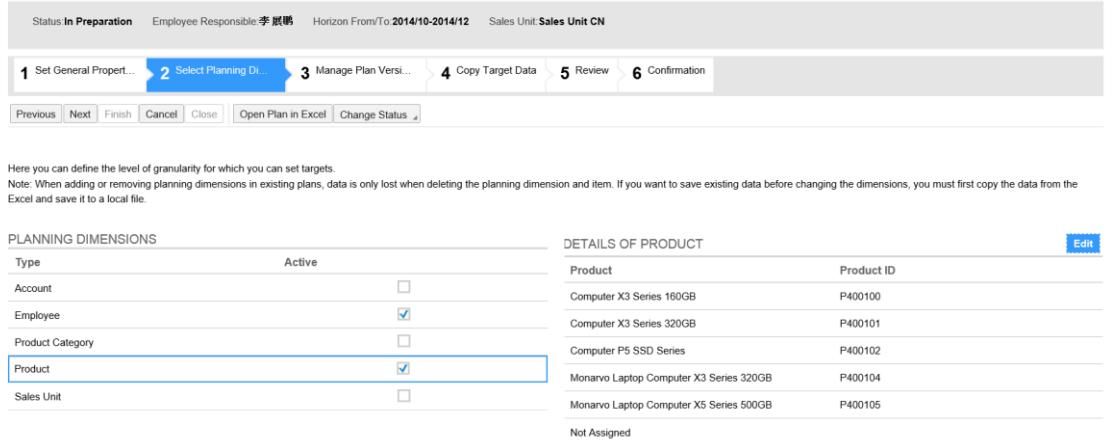


The screenshot shows the 'General Properties' section of the sales target plan setup. It includes fields for Sales Unit (Sales Unit CN), Horizon From/To (October 2014 / December 2014), Employee Responsible (李展鵬), Company (Almika), Direct Manager, and Plan Currency (USC). Other visible fields include Plan Name (Sales Unit CN (CN1100)) and Plan ID (CN1100).

1.1.1 Horizon From/To：計劃起迄期間。

1.2 按 **Next**，進入步驟二 Select Planning Dimensions(選擇計畫維度)，指定計劃的構成對象，有客戶、員工、產品類別、產品及組織可供挑選：

Sales Target Plan: Sales Unit CN (CN1100):2014/10-2014/12



The screenshot shows the 'PLANNING DIMENSIONS' section where 'Product' is selected. To the right, the 'DETAILS OF PRODUCT' table lists various computer models with their corresponding Product IDs.

PLANNING DIMENSIONS		DETAILS OF PRODUCT	
Type	Active	Product	Product ID
Account	<input type="checkbox"/>	Computer X3 Series 160GB	P400100
Employee	<input checked="" type="checkbox"/>	Computer X3 Series 320GB	P400101
Product Category	<input type="checkbox"/>	Computer P5 SSD Series	P400102
Product	<input checked="" type="checkbox"/>	Monarvo Laptop Computer X3 Series 320GB	P400104
Sales Unit	<input type="checkbox"/>	Monarvo Laptop Computer X5 Series 500GB	P400105
		Not Assigned	

1.2.1 選妥構成對象後，需作分配，按 **Edit**，顯示畫面如下：

Edit Product

AVAILABLE ITEMS		SELECTED ITEMS	
Product	Product ID	Product	Product ID
Not Assigned		No records found	
Grinding Service	GSRV-1000		
SONATA-WEDDING	S-253WM04		
FASTTRACK-EXPLORER	F-253WM01		
FASTTRACK-HIP HOP	F-253WM03		
FASTTRACK-SPEED RACER	F-253WM02		
FASTTRACK-TATOO	F-253WM04		
AUTOMATIC	T-2530WM05		
RAGA	T-2530WM02		

OK Cancel

1.2.2 可按 ，根據條件搜尋，選擇產品後，按  將所選擇的產品加入或按  將全部產品加上：

Edit Product

Product	Product ID
Not Assigned	
Monarvo Laptop Computer X5 S...	P400105
Monarvo Laptop Computer X3 S...	P400104
Computer P5 SSD Series	P400102
Computer X3 Series 320GB	P400101
Computer X3 Series 160GB	P400100

Product ID:
 Product Description: *computer*

Go Reset Save Query Organize Queries

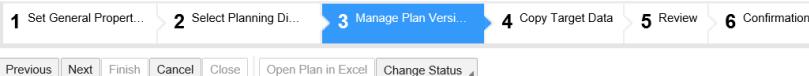
1  2  3 

OK Cancel

1.3 按 ，進入步驟三 Management Plan Versions(管理計畫版本)，輸入計劃的版本：

New Sales Target Plan

Status: In Preparation Employee Responsible: 李展鹏 Horizon From/To: 2014/10-2014/12 Sales Unit: Sales Unit CN



Previous Next Finish Cancel Close Open Plan in Excel Change Status

PLAN VERSIONS

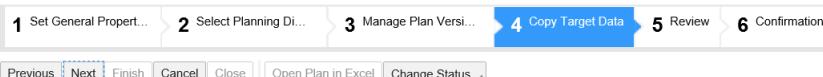
Add Row Copy Remove

Version Name	Description	Active Version	Changed On
VERSION1	Version 1	<input checked="" type="checkbox"/>	

1.4 按 **Next**，進入步驟四 Copy Target Data(複製目標資料)，可選擇複製之前的計劃資料：

New Sales Target Plan

Status: In Preparation Employee Responsible: 李展鹏 Horizon From/To: 2014/10-2014/12 Sales Unit: Sales Unit CN



Previous Next Finish Cancel Close Open Plan in Excel Change Status

You can copy data from the preceding sales plan into your plan version in order to get a basis for your planning. Select the source data and the plan version into which the selected data will be copied. Choose Refresh to display the result in the Preview area.

Selection of Copy Sources

Plan Horizon From/To: / /

Preview

Refresh

Selection of Copy Target

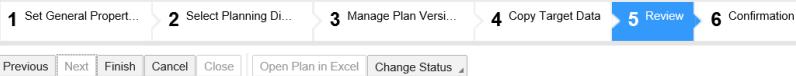
* Plan Version: /



1.5 按 **Next**，進入步驟五 Review(檢查)，檢視所輸入的資料是否正確無誤；

New Sales Target Plan

Status: In Preparation Employee Responsible: 李展鹏 Horizon From/To: 2014/10-2014/12 Sales Unit: Sales Unit CN



Previous Next Finish Cancel Close Open Plan in Excel Change Status

General Properties

Plan Name: Sales Unit CN (CN1100) 2014/10-2014/12

Plan ID: CN1100:2014/10-2014/12

Sales Unit: Sales Unit CN

Company: Almika

Horizon From/To: October 2014 / December 2014

Employee Responsible: 李展鹏

Direct Manager:

Plan Currency: USD

VERSIONS

Version Name	Active Version
--------------	----------------

VERSION1 Yes

Planning Dimensions and Items

Account:

Employee: Not Assigned

Product Categories:

Settings for Copying Actual Data

Copy Source

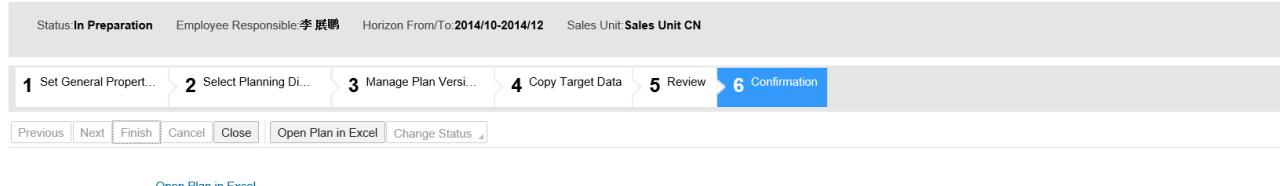
Plan: /

Copy Target

Plan Version:

1.6 按 **Finish**，進入步驟六，可按 [Open Plan in Excel](#)，在 Excel 中輸入資料：

Sales Target Plan: Sales Unit CN (CN1100):2014/10-2014/12



[Open Plan in Excel](#)

2 在 Excel 開啟後，可輸入目標計劃資料(需先安裝 Add-In for Microsoft Excel®)：

2.1 輸入各期間及所指定的構成對象的計劃金額：

活頁簿4 - Microsoft Excel						
檔案 常用 插入 版面配置 公式 資料 校閱 檢視 增益集 SAP Cloud for Customer						
A2						
1	Sales Target Setting					
2	Plan	CN1100:2014/10-2014/12				
3	Currency	US Dollar				
4	Target					
5	Employee Responsible	Product Calendar Year/Month	2014.10	2014.11	2014.12	Result
6	李展鵬	Computer X3 Series 160GB	20,000.00 USD	21,000.00 USD	20,000.00 USD	61,000.00 USD
7		Computer X3 Series 320GB	10,000.00 USD	9,000.00 USD	10,000.00 USD	29,000.00 USD
8		Computer P5 SSD Series	15,000.00 USD	12,000.00 USD	15,000.00 USD	42,000.00 USD
9		Monarvo Laptop Computer X3 Series 320GB	25,000.00 USD	21,000.00 USD	25,000.00 USD	71,000.00 USD
10		Monarvo Laptop Computer X5 Series 500GB	10,000.00 USD	9,000.00 USD	10,000.00 USD	29,000.00 USD
11		Not assigned	12,000.00 USD	11,000.00 USD	12,000.00 USD	35,000.00 USD
12		Result	92,000.00 USD	83,000.00 USD	92,000.00 USD	267,000.00 USD
13	李雪梅	Computer X3 Series 160GB	30,000.00 USD	25,000.00 USD	30,000.00 USD	85,000.00 USD
14		Computer X3 Series 320GB	15,000.00 USD	18,000.00 USD	15,000.00 USD	48,000.00 USD
15		Computer P5 SSD Series	18,000.00 USD	19,000.00 USD	18,000.00 USD	55,000.00 USD
16		Monarvo Laptop Computer X3 Series 320GB	21,000.00 USD	22,000.00 USD	21,000.00 USD	64,000.00 USD
17		Monarvo Laptop Computer X5 Series 500GB	11,000.00 USD	10,000.00 USD	11,000.00 USD	32,000.00 USD
18		Not assigned	8,000.00 USD	7,000.00 USD	8,000.00 USD	23,000.00 USD
19		Result	103,000.00 USD	101,000.00 USD	103,000.00 USD	307,000.00 USD
20	Not assigned	Computer X3 Series 160GB	0.00 USD	0.00 USD	0.00 USD	0.00 USD
21		Computer X3 Series 320GB	0.00 USD	0.00 USD	0.00 USD	0.00 USD
22		Computer P5 SSD Series	0.00 USD	0.00 USD	0.00 USD	0.00 USD
23		Monarvo Laptop Computer X3 Series 320GB	0.00 USD	0.00 USD	0.00 USD	0.00 USD
24		Monarvo Laptop Computer X5 Series 500GB	0.00 USD	0.00 USD	0.00 USD	0.00 USD
25		Not assigned	0.00 USD	0.00 USD	0.00 USD	0.00 USD
26		Result	0.00 USD	0.00 USD	0.00 USD	0.00 USD
27	Result		195,000.00 USD	184,000.00 USD	195,000.00 USD	574,000.00 USD

2.2 輸入完成後，可按全部保存，更新主機端資料：

SAP Cloud for Customer

活頁簿4 - Microsoft Excel

檔案 常用 插入 版面配置 公式 資料 校閱 檢視 增益集 SAP Cloud for Customer

全部保存

Currency		US Dollar			
		Target			
Product Calendar Year/Month		2014.10	2014.11	2014.12	Result
Computer X3 Series 160GB		20,000.00 USD	21,000.00 USD	20,000.00 USD	61,000.00 USD
Computer X3 Series 320GB		10,000.00 USD	9,000.00 USD	10,000.00 USD	29,000.00 USD
Computer P5 SSD Series		15,000.00 USD	12,000.00 USD	15,000.00 USD	42,000.00 USD
Monarvo Laptop Computer X3 Series 320GB		25,000.00 USD	21,000.00 USD	25,000.00 USD	71,000.00 USD
Monarvo Laptop Computer X5 Series 500GB		10,000.00 USD	9,000.00 USD	10,000.00 USD	29,000.00 USD
Not assigned		12,000.00 USD	11,000.00 USD	12,000.00 USD	35,000.00 USD
Result		92,000.00 USD	83,000.00 USD	92,000.00 USD	267,000.00 USD

- 3 最後確認後，應在清單畫面，按 **Change Status**，選 Active(啟動)，銷售目標的狀態將對應更新：

SALES LEADS OPPORTUNITIES SALES QUOTES FORECASTS TERRITORIES SALES TARGET PLANNING

SALES PLANNING: MY PLANS (2)

Status Plan Name Pla... Horizon... Horizon... Sales Unit Employee Responsible

Status	Plan Name	Pla...	Horizon...	Horizon...	Sales Unit	Employee Responsible
In Preparation	Sales Unit CN (CN1100);2014/07-2014/09		2014/07	2014/09	Sales Unit CN	李展鵬
Active	Sales Unit CN (CN1100);2014/10-2014/12		2014/10	2014/12	Sales Unit CN	李展鵬

三、銷售目標報表

(一) 作業目的：

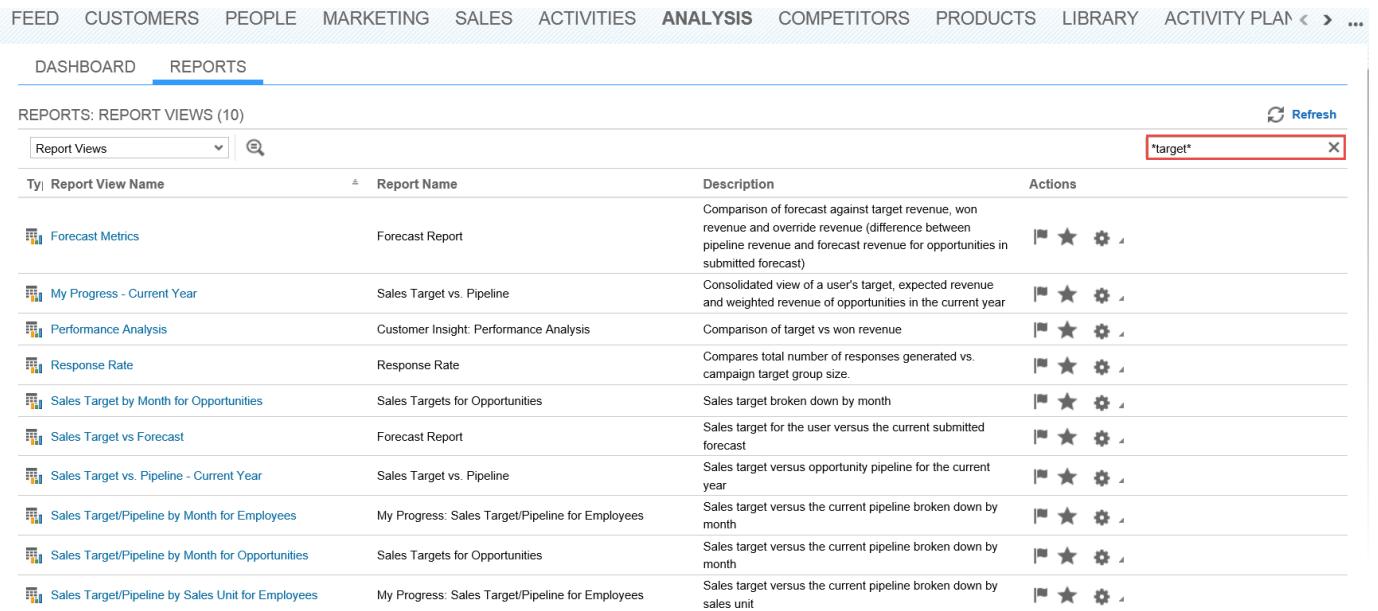
查詢銷售目標的達成狀況等。

(二) 存取方法：

路徑	選單→ANALYSIS(分析)→REPORTS(報表)
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(三) 操作說明：

1 在搜尋欄輸入*target*(目標)，按 Enter，搜尋與銷售目標相關的報表：



The screenshot shows a software interface with a navigation bar at the top containing various menu items like FEED, CUSTOMERS, PEOPLE, MARKETING, SALES, ACTIVITIES, ANALYSIS, COMPETITORS, PRODUCTS, LIBRARY, ACTIVITY PLAN, and more. Below the navigation bar, there are two tabs: DASHBOARD and REPORTS, with REPORTS being the active tab. Under the REPORTS tab, there is a sub-section titled 'REPORTS: REPORT VIEWS (10)'. On the right side of this section, there is a search bar with the placeholder text 'target*' highlighted with a red box. The main area displays a list of ten report views, each with a small icon, the report name, a description, and an 'Actions' column with three icons.

Report View Name	Report Name	Description	Actions
Forecast Metrics	Forecast Report	Comparison of forecast against target revenue, won revenue and override revenue (difference between pipeline revenue and forecast revenue for opportunities in submitted forecast)	[Icon] [Star] [Gear]
My Progress - Current Year	Sales Target vs. Pipeline	Consolidated view of a user's target, expected revenue and weighted revenue of opportunities in the current year	[Icon] [Star] [Gear]
Performance Analysis	Customer Insight: Performance Analysis	Comparison of target vs won revenue	[Icon] [Star] [Gear]
Response Rate	Response Rate	Compares total number of responses generated vs. campaign target group size.	[Icon] [Star] [Gear]
Sales Target by Month for Opportunities	Sales Targets for Opportunities	Sales target broken down by month	[Icon] [Star] [Gear]
Sales Target vs Forecast	Forecast Report	Sales target for the user versus the current submitted forecast	[Icon] [Star] [Gear]
Sales Target vs. Pipeline - Current Year	Sales Target vs. Pipeline	Sales target versus opportunity pipeline for the current year	[Icon] [Star] [Gear]
Sales Target/Pipeline by Month for Employees	My Progress: Sales Target/Pipeline for Employees	Sales target versus the current pipeline broken down by month	[Icon] [Star] [Gear]
Sales Target/Pipeline by Month for Opportunities	Sales Targets for Opportunities	Sales target versus the current pipeline broken down by month	[Icon] [Star] [Gear]
Sales Target/Pipeline by Sales Unit for Employees	My Progress: Sales Target/Pipeline for Employees	Sales target versus the current pipeline broken down by sales unit	[Icon] [Star] [Gear]

2 例如選 **Sales Target vs. Pipeline - Current Year (銷售目標與管道 - 本年)**：

2.1 顯示查詢條件的輸入畫面，可指定客戶、產品、產品類別或銷售部門等：

Sales Target vs. Pipeline

View : ▾ Sales Target vs. Pipeline - Current Year

Selection : ▾ Initial

You can customize the view by selecting from available chart options. Exp

 Selection
 Available Fields
 Rows & Colu...
<

Report Default View Default

Selection Criteria

Access Context:
 Display Currency:
 * Display Currency - C:

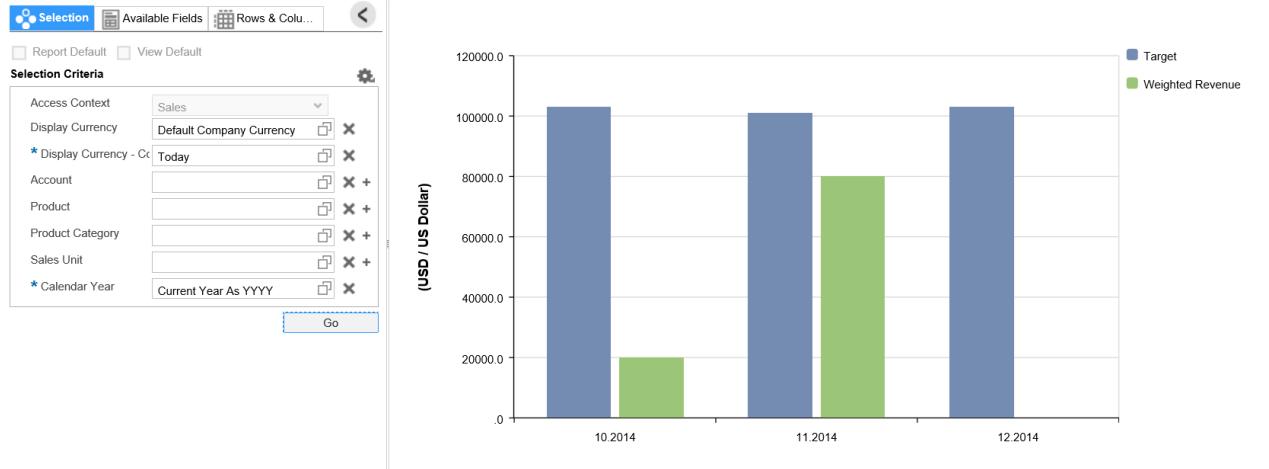
2.2 條件輸入完成後，按 **Go**，系統顯示查詢的結果：

Sales Target vs. Pipeline

View : ▾ Sales Target vs. Pipeline - Current Year

Selection : ▾ Initial

You can customize the view by selecting from available chart options. Expand the left panel in order to further narrow down the criteria or select a present view or selection at top.



2.2.1 Weighted Revenue(加權價值)：是 Opportunity(機會)中的 Expected Value(預期價值)*Probability(概率)計算出。

2.3 可以切換至 Available Fields 頁籤，增減顯示的欄位。例如勾選 Expected Value(預期價值)，即會顯示預期收入的金額：

Sales Target vs. Pipeline

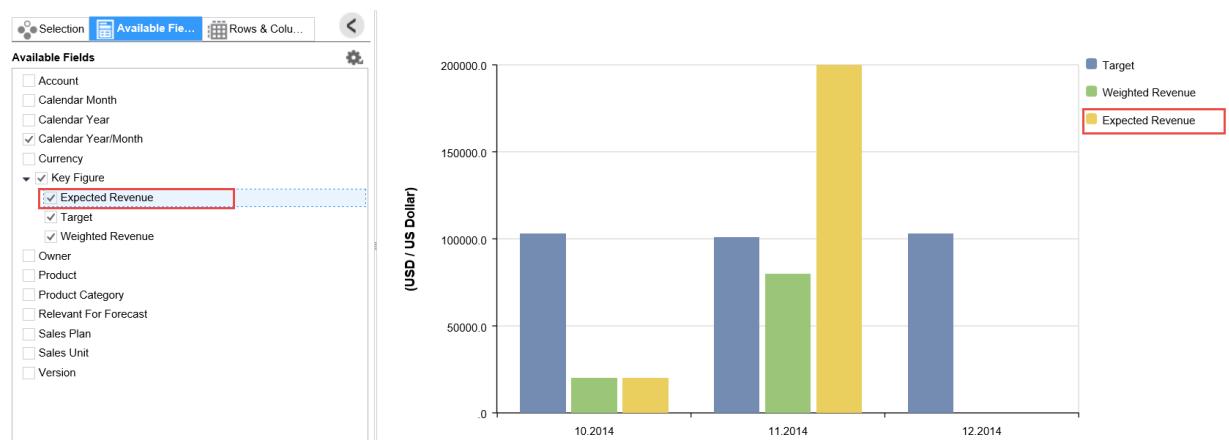
View : Sales Target vs. Pipeline - Current Year (modified)



Selection : Initial



You can customize the view by selecting from available chart options. Expand the left panel in order to further narrow down the criteria or select a present view or selection at top.



2.4 切換至 Rows & Columns 頁籤，可檢視目前橫向及縱向所顯示的欄位有哪些：

Selection Available Fields Rows & Colu...

Report Default

Row Fields

Calendar Year/Month

Column Fields

Key Figure

Target

Weighted Revenue

Expected Revenue

2.5 按 , 可從統計圖切換至數值表格：

Sales Target vs. Pipeline

View : Sales Target vs. Pipeline - Current Year (modified)

Selection : Initial



You can customize the view by selecting from available chart options. Expand the left panel in order to further narrow down the criteria or select a present view or selection at top.

Calendar Year/Month	Target	Weighted Revenue	Expected Revenue
10.2014	103,000.00 USD	20,000.00 USD	20,000.00 USD
11.2014	101,000.00 USD	80,000.00 USD	200,000.00 USD
12.2014	103,000.00 USD		

Selection Criteria

Access Context	Sales	▼
Display Currency	Default Company Currency	□
* Display Currency - C	Today	□
Account		□
Product		□
Product Category		□
Sales Unit		□
* Calendar Year	Current Year As YYYY	□

3 在 Rows & Columns 頁籤，可按 ，將所修改的行列格式儲存成另一名稱：

3.1 先選 Save As :

Selection
Available Fields
Rows & Colu...

Report Default

Row Fields

- Calendar Year/Month

Column Fields

- ▼ Key Figure
- Target
- Weighted Revenue
- Expected Revenue

[Rename](#)
[Delete](#)
[Save](#)
[Save As](#)
[Disable Refresh](#)

3.2 輸入名稱：

Save View As



Sales Target vs. Pipeline - Current Year (Expected Rev.)

My Progress - Current Year

Sales Target vs. Pipeline - Current Year

* View Name

Sales Target vs. Pipeline - Current Year (Exp)

OK

Cancel

3.3 在報表清單中即會新增所儲存的報表：

DASHBOARD REPORTS

REPORTS REPORT VIEWS (11)				
Type	Report View Name	Report Name	Description	Actions
	Forecast Metrics	Forecast Report	Comparison of forecast against target revenue, won revenue and override revenue (difference between pipeline revenue and forecast revenue for opportunities in submitted forecast)	  
	My Progress - Current Year	Sales Target vs. Pipeline	Consolidated view of a user's target, expected revenue and weighted revenue of opportunities in the current year	  
	Performance Analysis	Customer Insight: Performance Analysis	Comparison of target vs won revenue	  
	Response Rate	Response Rate	Compares total number of responses generated vs. campaign target group size.	  
	Sales Target by Month for Opportunities	Sales Targets for Opportunities	Sales target broken down by month	  
	Sales Target vs Forecast	Forecast Report	Sales target for the user versus the current submitted forecast	  
	Sales Target vs. Pipeline - Current Year	Sales Target vs. Pipeline	Sales target versus opportunity pipeline for the current year	  
	Sales Target vs. Pipeline - Current Year (Expected Rev.)	Sales Target vs. Pipeline	Shows the comparison of targets with opportunities and a projection based on opportunities for all employees. By default, the year-to-date net values for the current year are displayed.	  
	Sales Target/Pipeline by Month for Employees	My Progress: Sales Target/Pipeline for Employees	Sales target versus the current pipeline broken down by month	  
	Sales Target/Pipeline by Month for Opportunities	Sales Targets for Opportunities	Sales target versus the current pipeline broken down by month	  
	Sales Target/Pipeline by Sales Unit for Employees	My Progress: Sales Target/Pipeline for Employees	Sales target versus the current pipeline broken down by sales unit	  