We Substitute Excel Spreadsheet as a Sales Management & Forecasting Tools

Desktop/Tablet
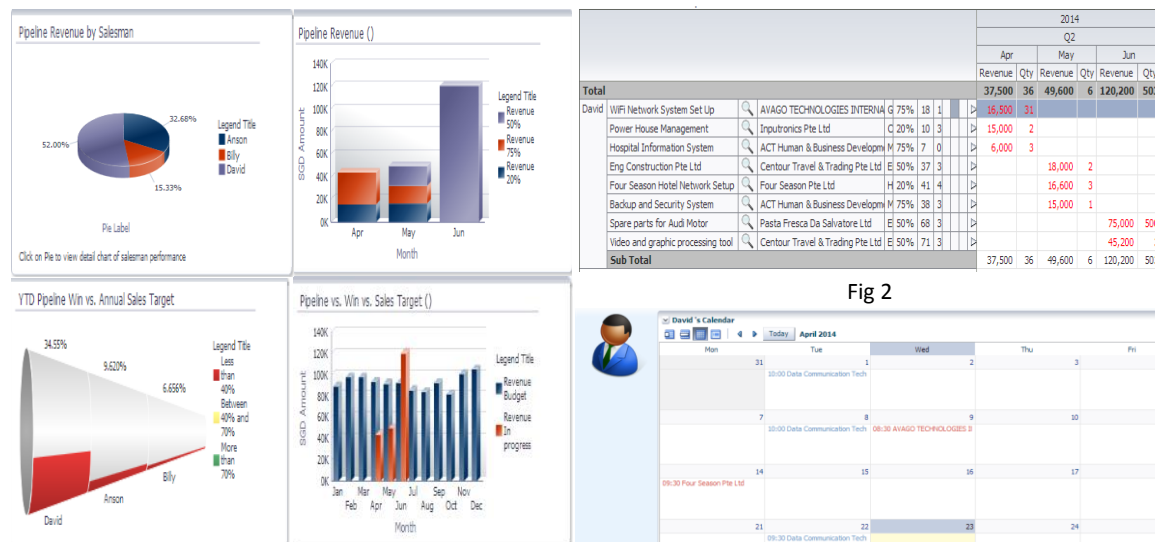
Pipeline Revenue by Salesman

Legend Title
- Anson
- Billy
- David

52.00%   32.68%   15.33%

Pie Label

Click on Pie to view detail chart of salesman performance

Pipeline Revenue ()

Legend Title
- Revenue 50%
- Revenue 75%
- Revenue 20%

YTD Pipeline Win vs. Annual Sales Target

34.55%   9.620%   6.656%

Legend Title
- Less than 40%
- Between 40% and 70%
- More than 70%

Anson   Billy   David

Pipeline vs. Win vs. Sales Target ()

Legend Title
- Revenue Budget
- Revenue In progress

Fig 1

					2014					
					Q2					
					Apr		May		Jun	
					Revenue	Qty	Revenue	Qty	Revenue	Qty
Total					37,500	36	49,600	6	120,200	503
David	WiFi Network System Set Up	AVAGO TECHNOLOGIES INTERNA	G	75%	18	1	16,500	31		
	Power House Management	Inputronics Pte Ltd	C	20%	10	3	15,000	2		
	Hospital Information System	ACT Human & Business Developm	M	75%	7	0	6,000	3		
	Eng Construction Pte Ltd	Centour Travel & Trading Pte Ltd	E	50%	37	3			18,000	2
	Four Season Hotel Network Setup	Four Season Pte Ltd	H	20%	41	4			16,600	3
	Backup and Security System	ACT Human & Business Developm	M	75%	38	3			15,000	1
	Spare parts for Audi Motor	Pasta Fresca Da Salvatore Ltd	E	50%	68	3			75,000	500
	Video and graphic processing tool	Centour Travel & Trading Pte Ltd	E	50%	71	3			45,200	3
Sub Total					37,500	36	49,600	6	120,200	503

Fig 2

David´s Calendar
April 2014
Today

Mon   Tue   Wed   Thu   Fri

31 / 10:00 Data Communication Tech   1   2   3
7 / 10:00 Data Communication Tech   8 / 08:30 AVAGO TECHNOLOGIES II   9   10
14   15   16   17
09:30 Four Season Pte Ltd
21   22   23   24
09:30 Data Communication Tech

Fig 3

Smart Phone

Logout   **Pipeline Progress**

Today's Update (0)   Today's Activity (0)

Completion% vs Revenue

- Hospital Information Sy...
- Backup and Security S...
- Video and graphic proc...
- Power House Manage...
- WiFi Network System S...
- Spare parts for Audi M...
- Eng Construction Pte Ltd
- Four Season Hotel Net...

Salesman   All
Progress%   All

Select	Year-Mth	Total Revenue
○	2014-Apr	37,500.00
○	2014-May	49,600.00
○	2014-Jun	120,200.00

75% Hospital Information System
David

Customer Closing Month Revenue
ACT Human & Business Development Pte Ltd
2014-Apr
6,000.00

75% WiFi Network System Set Up
David

Customer Closing Month Revenue
AVAGO TECHNOLOGIES INTERNATIONAL
2014-Apr
16,500.00

75% Carlet SuperMarket Lighting System
Billy

Customer Closing Month Revenue
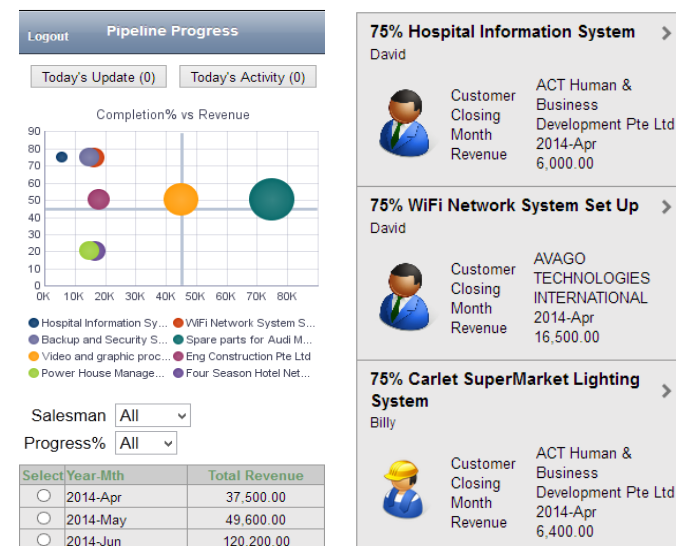ACT Human & Business Development Pte Ltd
2014-Apr
6,400.00

Fig 4

What Excel Cannot Do

- No auto consolidation of sales forecast by month by salesman in dashboard view
- No instant sales pipeline forecast in pivot view
- No salesman activities view
- No salesman pipeline view on mobile
- No transfer of project history from one salesman to another
- No centralized customer engagement history within the company

SCM Key Features

- Auto consolidation of sales forecast and sales target achievement in dashboard view (see Fig 1)
- Instant sales pipeline forecast in pivot view (see Fig 2)
- Salesman activity in calendar view (see Fig 3)
- 3 Months sales pipeline in dashboard view on Mobile Phone (see Fig 4)
- Ease of transfer of pipeline history between staff
- Data history is centrally stored in the system
- Allow data management per organization hierarchy
- Auto daily and weekly sales pipeline development report to the management
- Allow sales pipeline discussion forum and instant chat

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