



Reseller Portal

Extended Sales Departments



Your Customer Relationship - Our Solution

easySupport - easySales - easyContracts
easyInventory - easySelf-Service - easyPartner-Portal



Reseller Portal

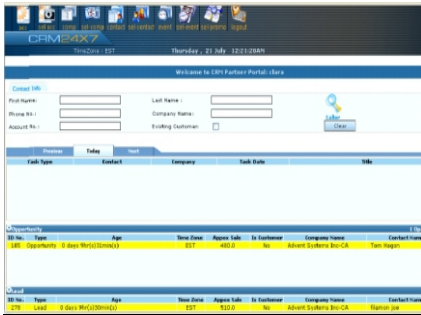


This is a very comprehensive application to be used by *Resellers*. Depending on the Privileges set, the partners can act as extended sales departments.

Reseller Portal :

Account

To open a new Account Screen from the header click on Account icon. By default, the account type is 'partner for a partner account. Partner company can be related only to account with type as 'Partner'.



Lead

- Find lead by First Name, Last name, Phone number, Company and Account name
- Select Individual or Business
- Select caller as existing or new
- Select Rating
- Select lead Territory
- Select call type
- Add interaction log (Email log, Phone log or Notes Log)
- Display interaction on interaction History tab
- Send EMAIL and Receive EMAIL
- Add Non promotional product that the caller is interested in
- Add Promotional Product that caller is interested in.
- Convert Lead to Opportunity

Opportunity

- Opportunity is created only when they are converted from lead to Opportunity
- History is transferred from Lead to opportunity
- Sell support program along with the product that caller is interested in
- Create quote (add tax, installation charge, Shipping charge and Give special discount)
- Email quote to the caller (To see if he agrees with the price and product)
- Create SALES order from the quote

Event

- Create event from the calendar
- Events created from the calendar are updated in the outlook
- Mark event as business or Personal
- Events tab displays [Previous, Today and Next (Future events)]

Promotion

- Create Promotion
- Select type of Promotion
- Define start and end date for promotion
- Assign product to the promotion
- Define discounts on product for Promotion



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