

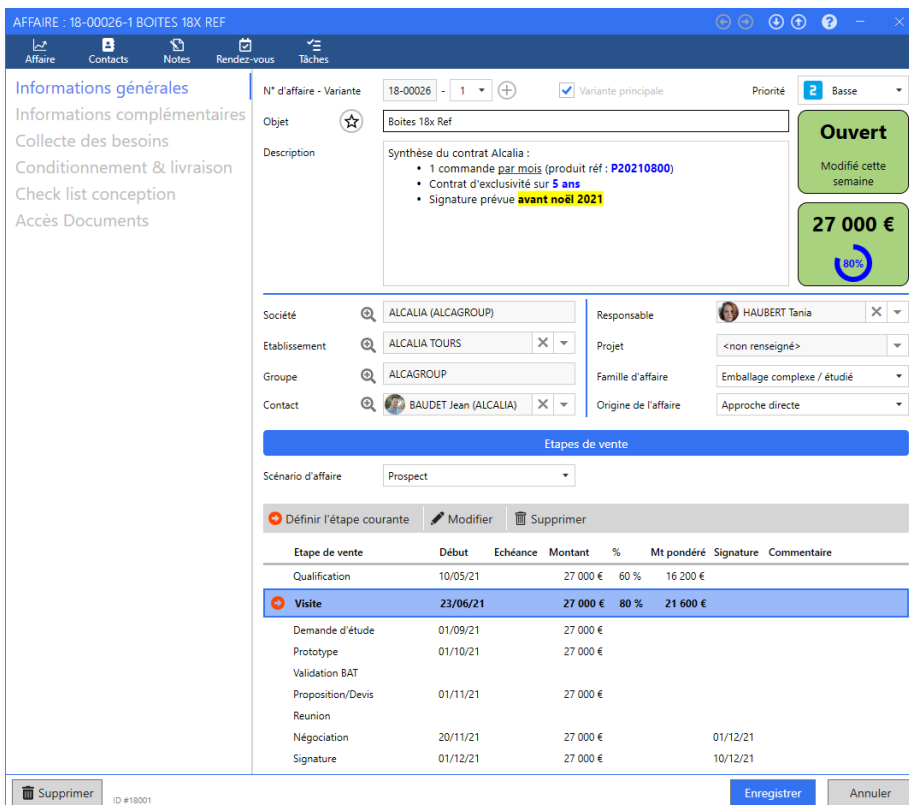
ReflexClient 4.4 : New features

Volume Software is pleased to introduce ReflexClient version 4.4. This version enriches the user experience with the new concept of business deals which replaces opportunities. Let's see what it's all about.

Business deals

As stated in our introductory text, sales opportunities were replaced by business deals. These benefit from a new screen and offer new features. Please note that existing opportunities will be automatically converted to business deals following the update process.

New window



Like for other elements of ReflexClient, like companies or contacts, the business deals window can be divided in three main parts:

- The upper band gives access to the contacts, notes, appointments and jobs relating to the business deal
- The left panel gives access, in standard, to General information and Additional information about the business deal, as well as customizable menus
- The right, main, panel, is used to perform actions on business deals

General information

N° d'affaire - Variante: 18-00026 - 1 (+) ☒ Variante principale Priorité: 2 Basse

Objet: ☆ Boîtes 18x Ref

Description: Synthèse du contrat Alcalia :
 • 1 commande par mois (produit réf : P20210800)
 • Contrat d'exclusivité sur 5 ans
 • Signature prévue avant Noël 2021

Ouvert
Modifié cette semaine

27 000 €
80%

2

Société: ALCALIA (ALCAGROUP)
 Etablissement: ALCALIA TOURS
 Groupe: ALCAGROUP
 Contact: BAUDET Jean (ALCALIA)

Responsable: HAUBERT Tania
 3
 Projet: <non renseigné>
 Famille d'affaire: Emballage complexe / étudié
 Origine de l'affaire: Approche directe

In the General information tab, the upper part of the screen ① allows you to enter general information about the business deal, including its object (business deal title) and its description.

Like for the company and customer records, an icon enables you to add quickly the business deal to your favourites. The notions of business deal number and variant, as well as the indicators displayed on the right, are detailed in dedicated sections.

The lower left part ② enables you to enter the information about the target company of the business deal:

- The company, required.
- The facility within the company, where appropriate.
- The group, automatically retrieved of the company is attached to a group.
- Your contact inside the company.

The lower right part ③ allows you to inform the business deal details:

- A business deal manager, in your company.
- An umbrella project for the business deal.
- Clicking on the selector will display the list of existing projects and allow the creation/modification/deletion of projects. Note that the notion of project can apply to different companies for which we would like to regroup business deals.
- The business deal family, for example the "Packaging" or "POS" families in the cardboard business.
- The business deal origin, in order to specify the channel which brought the deal, e.g. "Website", "Advertisement" or "Fair".

Business deal numbers and variants

N° d'affaire - Variante 18-00026 - 1 + ☒ Variante principale

Business deal number

The business deal numbering is performed when ReflexClient communicates with the server. This works as follows:

- When I create the business deal, the number is not assigned yet:

N° d'affaire - Variante Non attribué - Non attribué

- When I am done completing the business deal and if I am connected to the server, a business deal number is automatically assigned when saving the deal:

✓ L'affaire '21-00007' a été créée

- If I am not connected to the server, the business deal number will remain unassigned until the next server synchronization.

Variants

Just like it is possible to create estimate variants in your ERP (e.g. technical, colour, quantity variants), you can also create business deal variants.

The variant creation duplicates the header information of the original business deal (company, manager, ...).



By default, this is the main variant but the “Main variant” checkbox offers the ability to select the variant to display as the main variant.

The concept of main variant is particularly useful in the calculation of the total amount of business deals, displayed at the bottom of the business list:

	18-00034-1	<input checked="" type="checkbox"/>	Entreprise Nouvelle
	18-00035-1	<input checked="" type="checkbox"/>	Erma Flux Etudes Réalisations
	19-00008-1	<input checked="" type="checkbox"/>	EURO FREINS
	19-00011-1	<input type="checkbox"/>	IMBIMBES JEAN CLAUDE LEON
Total montants: 2 084 195 € (pondéré: 1 817 810 €) - Sélection: 4 500 € (pondéré: 4 500 €)			

In order not to skew calculations by adding multiple times to amounts relating to the same deal, only the main variants are totalized. Nonetheless, ReflexClient offers you the ability to select a group of business deals. Their total amount will be displayed on the same line, after “Selection”.

Key Performance Indicators (KPI)


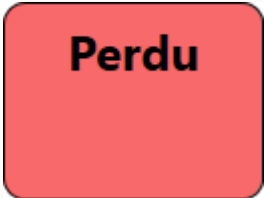
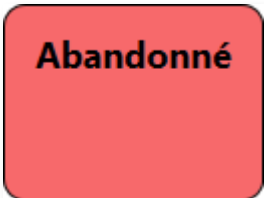


In the upper right part of the window, two new visual indicators are now available.

- The first indicates the status of the business deal, as well as its inactivity.
- The second indicates the business deal amount and its chances of success.

The various statuses are the following:

Status	Background colour	Definition
Open	<p>The box colour is based on the business deal activity: if it was just created or modified in the current week, the business deal is displayed in green:</p> <div> Ouvert Modifié cette semaine </div> <p>If the business deal remains inactive for several weeks, it will progressively turn to red:</p> <div> Ouvert Non modifié depuis 14 semaines </div>	This is an ongoing business deal.

Status	Background colour	Definition
Won	A won business deal displays against a bright green background: 	The deal is won and the box automatically displays the date of signature. The reason is not required.
Lost	A lost business deal displays against a bright red background: 	The deal is lost. The reason is required.
Aborted	An aborted business deal displays against a bright red background: 	The deal is aborted. The reason is required.

The second box displays the entered amount for the business deal, or "Turnover not evaluated" if there isn't any input amount.

The colour of this box depends on the chances of success of the business deal.

If the business is won or lost/aborted, this box will be of the same colour as the business deal status indicator.

However, if the business is open, this box will reflect the chances of success of the business deal: from red for a deal with low prospects of success to green for a deal which will most certainly be successful. Chances of success are materialized by a percentage and a circle which is more or less completed:



Please note: If the business deal amount was not entered, this box will remain grey as long as the deal is open.

Sales steps

The sales steps that you know were kept in the lower part of the screen, with a refreshed design.

Etapas de vente							
Scénario d'affaire Prospect							
➕ Définir l'étape courante ✎ Modifier 🗑 Supprimer							
Etape de vente	Début	Echéance	Montant	%	Mt pondéré	Signature	Commentaire
Qualification	10/05/21		27 000 €	60 %	16 200 €		
➕ Visite	23/06/21		27 000 €	80 %	21 600 €		
Demande d'étude	01/09/21		27 000 €				
Prototype	01/10/21		27 000 €				
Validation BAT							
Proposition/Devis	01/11/21		27 000 €				
Reunion							
Négociation	20/11/21		27 000 €			01/12/21	
Signature	01/12/21		27 000 €			10/12/21	

You will find the business deal scenario which allows you to customize the sales steps based on the context in order, for example, to display a reduced number of steps when dealing with a renewal scenario.

Once the business deal scenario selected, the screen will display the corresponding sales steps. Double-click on a step (or select it and click on "Modify") to open the sales step modification screen:

ETAPE DE VENTE : VISITE

Etape de vente

Date de début de l'étape mer. 14/11/2018
Date d'échéance de l'étape ven. 15/10/2021

Date de signature prévue

Estimation de réussite 30%

Montant 4 500 €
Montant pondéré 1 350 €

Commentaire

ID #76001
OK
Annuler

Note that when modifying the current step, you can update the business deal state:

Etat Affaire

Etat Perdu
Motif de clôture Le besoin client a évolué

Date de clôture mer. 20/10/2021

Etape de vente courante

A won business deal automatically updates the date of signature with the current date. The closure of a business deal ("Lost" or "Aborted") requires the input of the reason.



Additional information

With additional information, users get a quick access to basic information about the business deal: state of the deal, information about the creation/modification of the deal (user and date).

AFFAIRE : 18-00025-1 COLLECTION PROTECTION SUPPORT

[Affaire](#)
[Contacts](#)
[Notes](#)
[Rendez-vous](#)
[Tâches](#)

Informations générales

Informations complémentaires

Collecte des besoins

Conditionnement & livraison

Check list conception

Accès Documents

Etat: Gagné

Date de clôture: dim. 25/11/2018

Créé par: HAUBERT Tania Le mer. 14/11/2018 00:00

Modifié par: MARTIN Etienne Le mer. 20/10/2021 00:00

Configurable menus

While product lines were deleted, this information can be entered in configurable menus which are available, like on the company and contact records, on the left panel of the screen.

As is the case for companies, these configurable tabs enable admins to create custom buttons to open network folders with various variables in the path, including the business deal number.

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Informations générales

Informations complémentaires

Collecte des besoins

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Check list conception

Accès Documents

Documents techniques de l'affaire

Dossier de l'affaire: Ouvrir le dossier

Commentaire:

Documents liés au client

Dossier du client: Ouvrir le dossier

Devis du client: Devis du client

Grouped actions

In the list of business deals, a new grouped action allows you to batch-assign business deals numbers , for a selection or all business deals in your list.

When updating ReflexClient, when opportunities are converted into business deals, this function enables users to quickly number the business deals which have not been assigned a number.

+ Créer Dupliquer Modifier Supprimer Marquer comme favori Actions groupées Marquer comme lu Excel Imprimer									
Affaire-var	Princ	Dénomination sociale	Objet affaire				Util.	Responsable	Priorité
19-00003-1	<input checked="" type="checkbox"/>	ABC NORD	Vente de ...	Gagné	15/02/2019 00:00	MARTIN Etienne	3	30	
18-00024-1	<input checked="" type="checkbox"/>	ABC NORD	Emballages etuis new real	Perdu	14/11/2018 00:00	HAUBERT Tania	2	15	
18-00021-1	<input checked="" type="checkbox"/>	Abrasifs France	Stockage	Perdu	14/11/2018 00:00	DELORS Alain	3	15	
18-00022-1	<input checked="" type="checkbox"/>	Achille Tonic Productions	Emballage souple	Gagné	14/11/2018 00:00	HAUBERT Tania	3	15	
18-00004-1	<input checked="" type="checkbox"/>	AIR PRODUCTION	Emballage KL500	Perdu	30/11/2018 00:00	MARTIN Etienne	2	30	
18-00025-1	<input checked="" type="checkbox"/>	AIR PRODUCTION	Collection protection support	Gagné	14/11/2018 00:00	HAUBERT Tania	3	15	
18-00026-1	<input checked="" type="checkbox"/>	Alcalia	Boites 18x Ref	Perdu	14/11/2018 00:00	HAUBERT Tania	2	15	
18-00007-1	<input checked="" type="checkbox"/>	ALFORT ELÉVATEUR	CARN - Marché annuel	Gagné	13/11/2018 00:00	MARTIN Etienne	2	15	
18-00008-1	<input checked="" type="checkbox"/>	ALFORT ELÉVATEUR	CATALOGUE FEVRIER 2019 - 3500 ex.	Gagné	13/11/2018 00:00	MARTIN Etienne	5	31	

▲ Above, batch assignment for a selection of business deals

▼ Below, batch assignment window for a whole list of business deals

ATTRIBUTION GROUPEE DE NUMÉROS D'AFFAIRES ET DE VARIANTES

Cette action groupée concerne l'ensemble de la liste courante.

Nombre d'affaires sélectionnées

61

Nombre de numéros d'affaires et/ou variantes déjà attribués

61

Nombre de numéros d'affaires et/ou variantes à attribuer

0

0 numéros d'affaires et/ou variantes restants à attribuer

0%

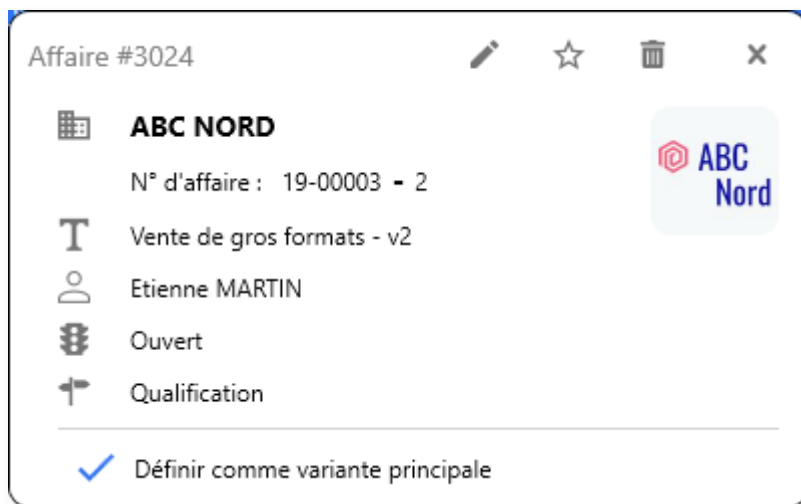
Temps restant estimé : indéterminé

Exécuter le traitement

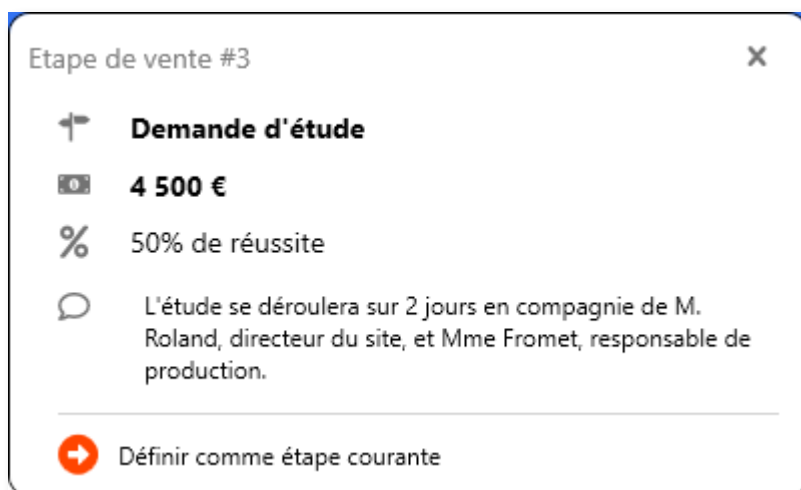
Annuler

New contextual information windows

In lists of business deals, new contextual information windows offer a synthesis of the available information about the business deal, as well as various quick actions, such as turning a simple variant into a main variant.

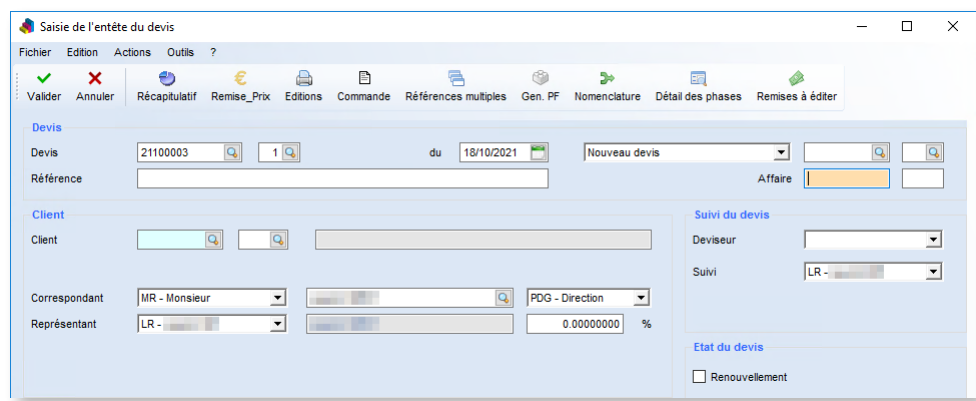


In the sales steps available on the business deal details window, right-clicking on a sales step displays a synthesis of available information about the step, and offers you a quick action to define this step as the current step:



Synchronisation ERP

With an option, in the administration of server bases ("Manage this ERP database"), business deals can now be directly transferred in the VoluPack ERP ("Affaires" table). As a reminder, in the input of VoluPack estimates, you can enter a business deal number, as an umbrella for the created estimates.



▲ Above, Business deal input field in the multisector estimate of VoluPack.