

## Summary

This document outlines the process for entering Sales associated to ADS in vTiger:

## Process Step-By-Step

Step	Description	Responsible
1.	<ul style="list-style-type: none"> <li>Qualification determined “ADS”</li> <li>Lead converted to an Organization with associated Opportunity with naming convention “Client Name - TSOW ADS” tied to the “ADS Leads” Campaign</li> <li>Assigned to Sales Rep</li> </ul>	Derek Pease
2.	<ul style="list-style-type: none"> <li>Sales Rep determines specific need and creates Quote for TSOW with naming convention “Client Name - TSOW ADS”</li> <li>Quote submitted to ADS Sales Engineer for Ballparking and TSOW amount is determined to start</li> <li>TSOW Accepted by Client</li> </ul>	ADS Sales Rep/ADS SE
3.	<ul style="list-style-type: none"> <li>Derek facilitates TSOW through NS Cart</li> <li>Sales Rep marks TSOW Opp Closed Won (and additional required fields), marks Quote Accepted with (TSOW) product, generates Sales Order from Quote (Sales Rep will automatically be the “Assigned To”)</li> <li>Derek adds himself as “AM” on Sales Order</li> </ul>	Derek Pease/ADS Sales Rep
4.	<ul style="list-style-type: none"> <li>Duplicate Opportunity created from existing TSOW Opportunity so “ADS Leads” Campaign remains associated (Info will need to be adjusted - Sales Stage etc)</li> <li>Quote created from the new Opportunity with naming convention “Client Name - ADS Services”</li> <li>Quote submitted to ADS SE for project scope/deliverables/pricing</li> <li>ADS Services Accepted by Client</li> </ul>	ADS Sales Rep/ADS SE
5.	<ul style="list-style-type: none"> <li>Repeat Step 3 (replacing TSOW with “ADS Services”) ***NOTE: If an ADS generated lead results in OLM services being accepted after a TSOW and ADS Services sold, process stays the same except the OLM products will be carried over from the Quote to satisfy product level reporting so the correct department recognizes revenue to the product. ADS products are put in place to recognize Advanced Custom Work and not OLM products***</li> </ul>	Derek Pease/ADS Sales Rep

## Process Goal

- Sales Opps and ADS Sales Rep can recognize sales totals in standard sales reporting based on the logic of Sales Rep always being the “Assigned To”
- ADS AM can recognize ADS associated revenue in standard reporting either based on “AM field” on SO if OLM products are sold by date range, Product Level reporting based on ADS products by date range or Closed Won Opportunities with Campaign “ADS Leads
- Product level reporting remains consistent and follows the logic of all other sales associated with a sales rep