

# OFSY™

## SALES FORCE AUTOMATION

**OFSY SFA** is essential for enhancing the performance of your in-house and field sales teams. However, the real challenge of successful sales management is to keep all members of the company's team informed and involved in every aspect of the sales cycle. The daily exchange of information between a widely dispersed sales force is critical to the management of effective company-wide sales and marketing efforts.

With the OFSY sales automation software, you can enjoy all the benefits of a comprehensive contact management system regardless of the location of your sales staffmembers. By using the remote update function, you can achieve automated and effortless connectivity between all members of the sales team in multiple locations.

## **OFSY provides your Sales department with:**

### **Category:**

This section is used for creating categories. Any number of sub-categories can be created under the parent category.

e.g. Suppose you enter the main category as Vegetables. Then it can have sub-categories like tomato, cabbage, potato etc.

### **Service/ Product :**

Item description of a particular category is specified here.

### **Sales Person :**

Details of the sales person is specified here.

### **Sales Team :**

Sales Team can be formulated for a particular branch/ region.

### **Team Budget :**

This section is used for allocating the budget for the team.

### **Team Target :**

This section is used for allocating the budget for the team.

### **Win Trigger :**

This section is used for specifying that the lead is almost converted into a business, so to be ready with the raw material required to do the work.

### **Reminders :**

Reminders are send, if a particular lead, prospect or customer is attended for a certain number of days.

### **Referral :**

Referral is a person whose not involved in the sales of the product/ service, but who refers the company/ person about a prospective customer.

**Lead :**

Lead is a person whom you think may buy the product.

**Prospect :**

After making the proposal, the lead is converted into a prospect.

**Quotation :**

When a lead is converted into a prospect, then a quotation is generated.

**Customer :**

This section is used for creating the prospective customer who has struck a one or more deals.

**Deal**

When a prospect is converted into a prospective customer, a deal is struck.

**Transfer**

This section is used for transferring the lead or prospect to a particular sales person, so that he can follow up and convert the lead or prospect into a prospective customer.

**Return Order**

This section is used for specifying the return order details of the goods supplied to the customer, in case the customer is not satisfied with the goods.

**Reports**

Usually an administrator tool is not the best tool for managers or non-technical staff who need access to asset management information. To meet this need, OFSY SFA suite includes powerful web publishing features to turn any browser into an executive information system. Numerous pre-packaged web reports are available from any Web Browser support presentations, quality graphs and tables. Use the drill down feature to offer multiple levels of detail in each report.

## CONTACT DETAILS

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# OFSY™

Extending Your Business Reach

Your Complete & Secure One-Stop Solution For Office Automation.

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