



# Blue Eclipse

Sales Management

Powered by **PixPro™** Sales Force

# Pix<sup>N</sup>PLAY

B A N K Y O U R I D E A \$

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## Login

When the user opens the app, the splash screen appears for 3-4 seconds. Then, the login screen appears. The user will need to enter his/her username (email) and password, to proceed using the app.



Clicking Forget Password will request for the user's email and password, which will sent the user his/her username. If it is for a new user, he/she will have the option to Create User Profile.

## Create User Account

To create a new profile, the user will need to key in his/her details and choose the account type (Manager/Sales Employee). Only a Manager can create a user profile for another Manager or a Sales Employee. Therefore, the user will need to enter the Admin password, in order to verify him/her as the authorized user for creating a new profile.

All details must be keyed in

Forgot Password

Register

Login

**BLUE** *eclipse*<sup>TM</sup>

First Name

Last Name

Email

Password

Confirm Password

User Profile Type

Admin Password

Forgot Admin Password

Register

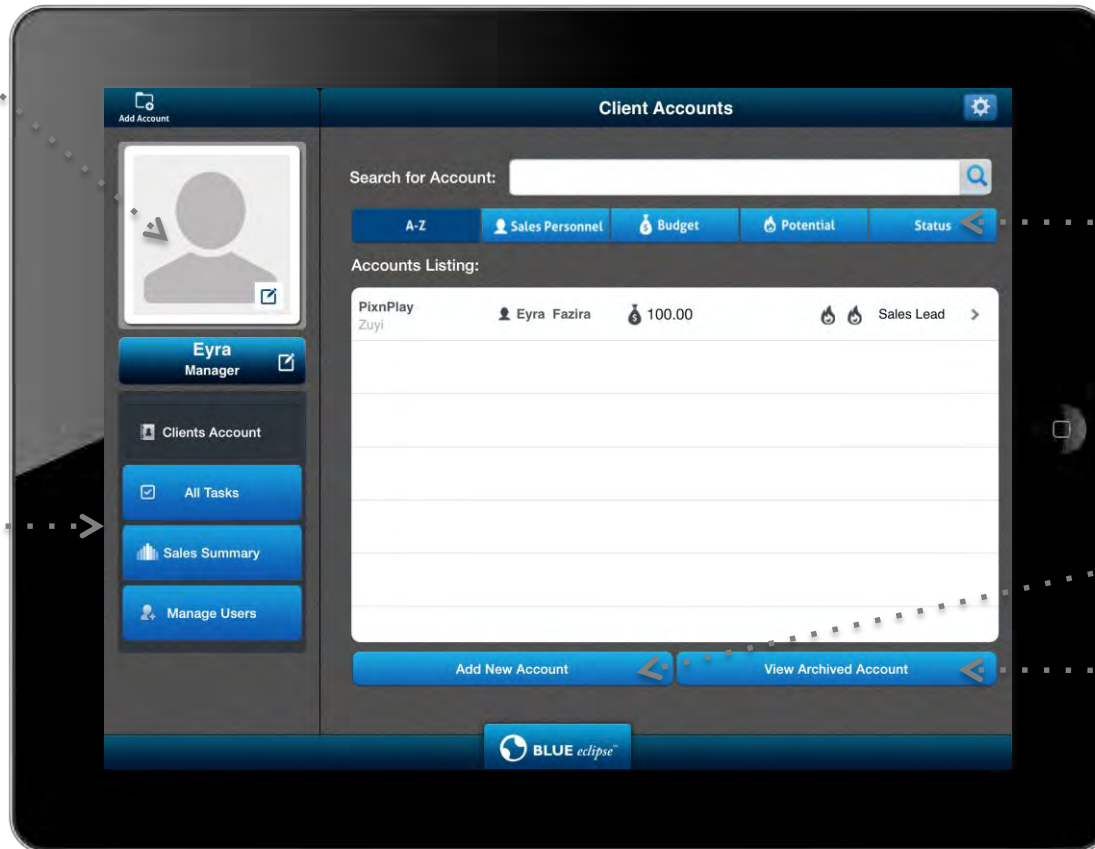
Log In

The Admin can create a user profile for a Manager, and a Manager can create a user profile for the Sales Employee. Upon completion of creating the profile, a Sales Personnel ID and a Manager password will be auto-generated for the Manager and sent to his email ID.

## Account List

The user will see the Account List by default after logging in the app.

Name of user, type of user (Manager/Sales Employee) and a default picture are displayed.



Navigation for Account, All Tasks, Sales Summary and Manage Sales Employee Account for Manager; Sales Employee will not be able to see the last option.

Sort Account names either by alphabetical order, highest budget, hottest potential, status, etc.

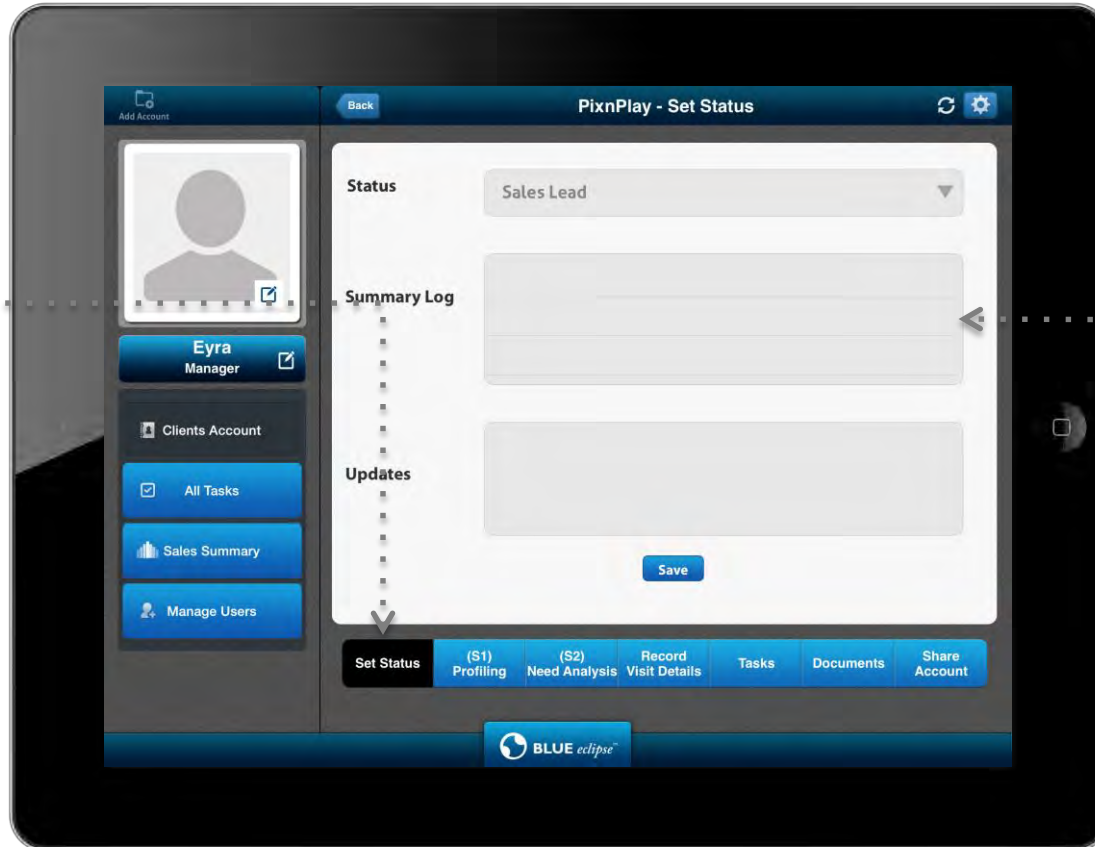
Add New Account

View Archived Account

Account names are as per Company names. User can add a new account, or view archived accounts. User also gets to archive or delete an existing account, if he is a Manager. If the user is a Sales Employee, he/she can only archive it (and not delete it permanently).

## Set Status

On selecting an account, user gets to select his/her status from the dropdown having the options - Set Status, (S1) Profiling, (S2) Needs Analysis, Record Visit Details, Task, Documents and Share Account for Manager; and the options - Set Status, (S1) Profiling, (S2) Needs Analysis, Record Visit Details, Task, and Analysis for Sales Employee.



Details to be keyed in.

On clicking 'Set Status', the different status are listed as – Sales Lead, Prospecting, Validation, Proposal, Negotiation, Won, Lost, and Not a Deal. The Summary Log history gets displayed below that. User also gets the option to update new summary and save it.



## Profiling

On clicking the tab (S1) Profiling, user is able to update his namecard and fill in details like Company Name, Contact Person Name, Email, Contact Number and Company Basic Information.

Key in the estimate budget.

Select a completion date and select potential from the dropdown with options like Lukewarm, Warm, Hot, and Burning. He can then save the data entered, proceed on to (S2) Needs Analysis, or print.

As with all forms, after the input has been made, the fields will be gone and be presented as just a text. If user wants to edit the text/info, they will then click on the text and field will be made editable.

## Needs Analysis

On clicking tab (S2) Needs Analysis, user gets to enter Business Statistics, Operation Process, Technology Adopted, and Customer Problem. He can then save the data, or print it.

The screenshot displays the 'PixnPlay - S2 Analysis' mobile application interface. The top navigation bar includes a 'Back' button, the title 'PixnPlay - S2 Analysis', and a settings icon. The left sidebar menu contains the following items: 'Add Account', a user profile for 'Eyra Manager', 'Clients Account', 'All Tasks', 'Sales Summary', and 'Manage Users'. The main content area features four input fields for data entry: 'Business Statistics', 'Operation Process', 'Technology Adopted', and 'Customer Problem'. Below these fields are 'Save' and 'Print' buttons. The bottom navigation bar includes tabs for 'Set Status', '(S1) Profiling', '(S2) Need Analysis', 'Record Visit Details', 'Tasks', 'Documents', and 'Share Account'. The 'BLUE eclipse' logo is positioned at the bottom center of the screen.

Details to be keyed in.



## Record Visit Details

User can record a visit details by entering Date of Meeting, Client Name, and Visit Summary; and then save it. User can also view previous visit details and edit it. When user views his/her visit details, the Sales Personnel name and account ID automatically get stamped.

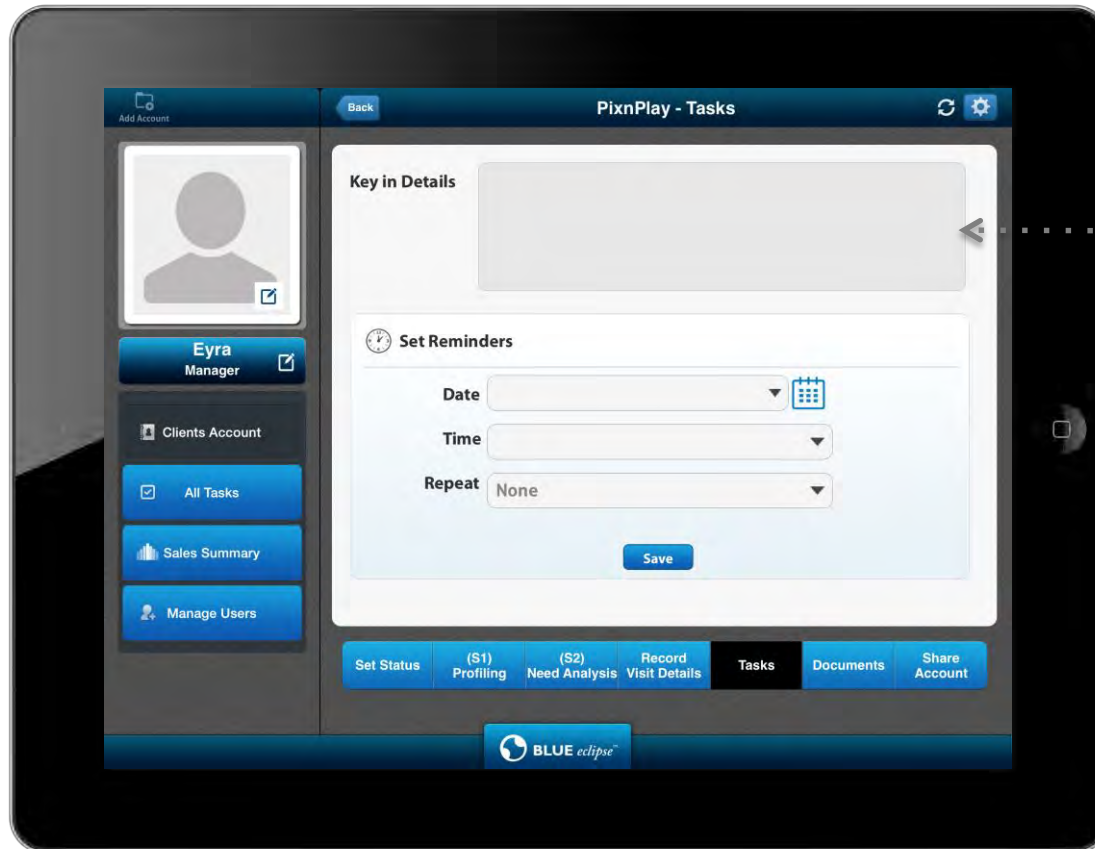
The screenshot shows the 'PixnPlay - Record Visit Details' screen on a tablet. The interface is divided into a left sidebar and a main content area. The sidebar contains a profile card for 'Eyra Manager' and a list of navigation options: 'Clients Account', 'All Tasks', 'Sales Summary', and 'Manage Users'. The main content area features three input fields: 'Date of Meeting' with a calendar icon, 'Client Name', and a larger 'Visit Summary' text area. Below these fields are 'Save' and 'View Previous visit Details' buttons. At the bottom, a navigation bar includes buttons for 'Set Status', '(S1) Profiling', '(S2) Need Analysis', 'Record Visit Details' (which is highlighted), 'Tasks', 'Documents', and 'Share Account'. The 'BLUE eclipse' logo is visible at the very bottom. A dashed line with an arrow points from the text 'Details to be keyed in.' to the input fields.

Details to be keyed in.

When user views his previous visit details, he can swipe the screens left or right to view all the previous records. The total number of records is displayed on top with the indication of the nth record in the form '1 of 5'.

## Add Tasks

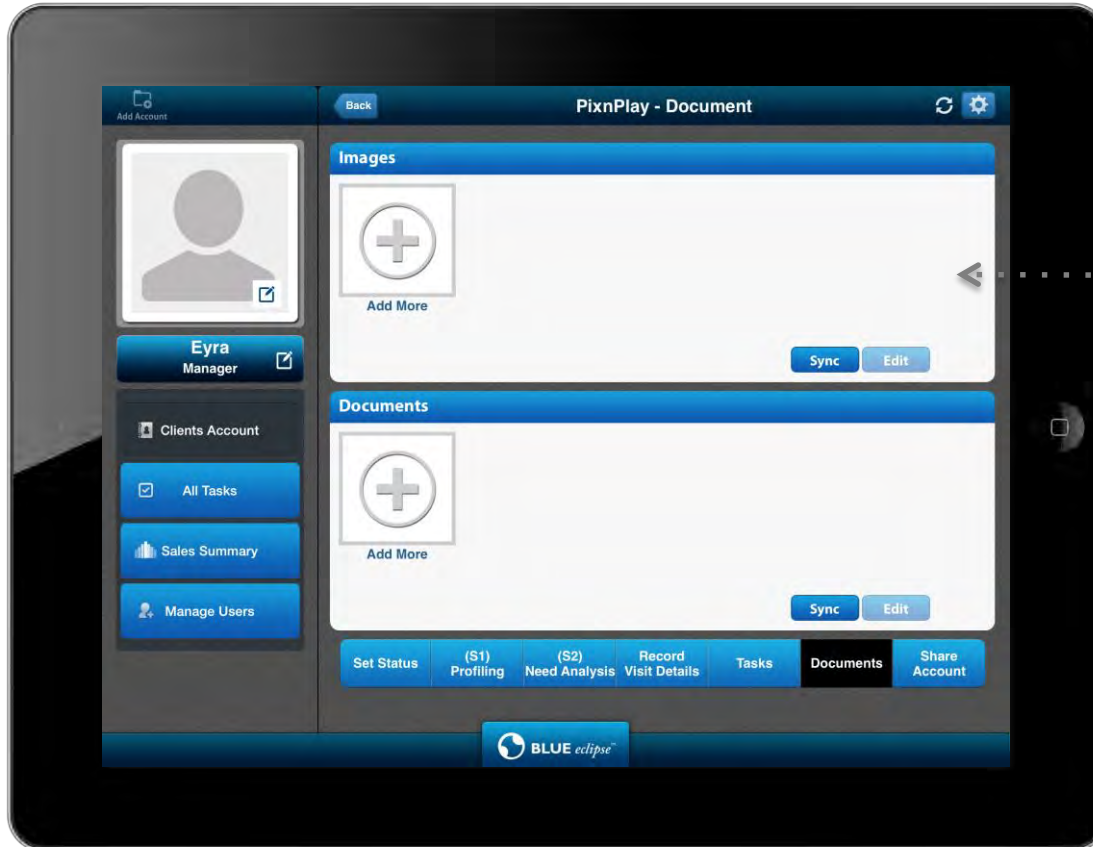
User can add a new task by Key in Details, and setting reminders by selecting date and time, choosing if he/she wants to repeat reminder, and how many times. Calendar will be synchronized with the iOS calendar.



Details to be keyed in.

## Documents

User can download images or documents (PDF, Word, Excel or PowerPoint documents) in this section by clicking the '+' icon in the app. User can also view the images and documents that he/she had downloaded earlier by scrolling towards the right. User also gets the option to click to 'edit' in order to choose the files he/she wants to delete.

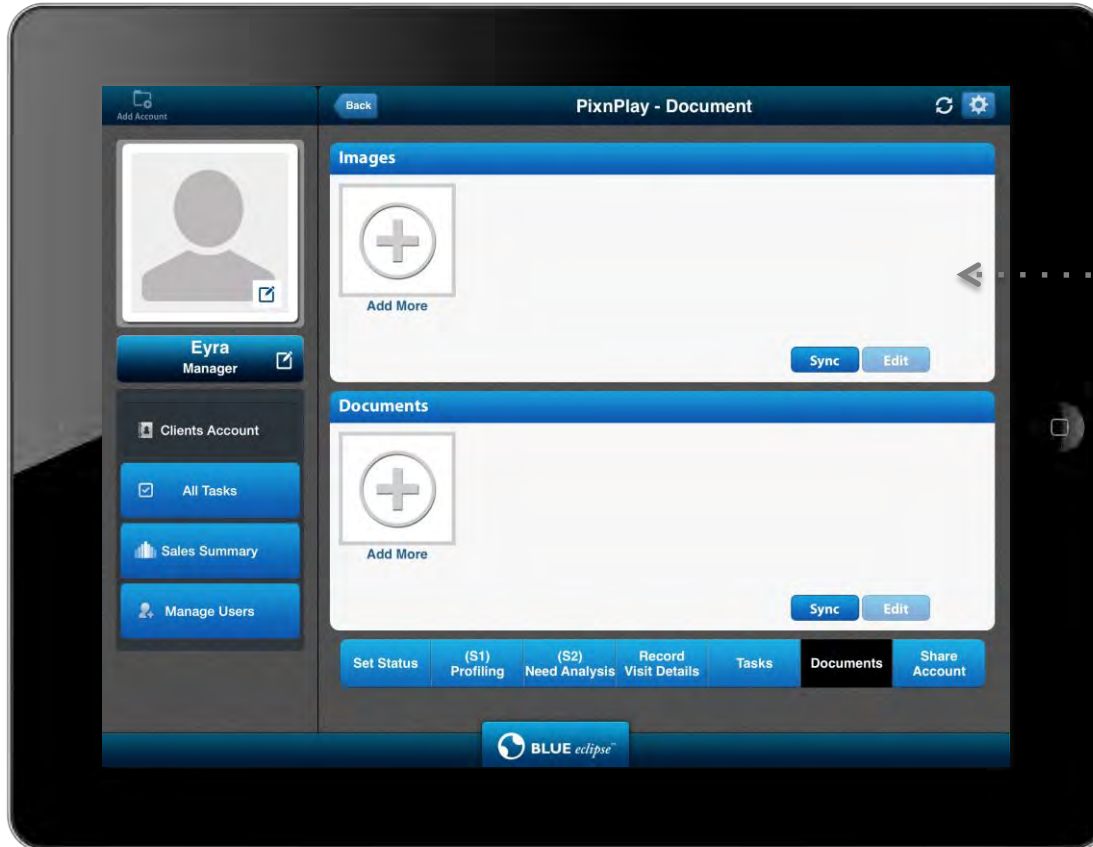


When user clicks on '+', he/she gets the option to either choose an image from the device gallery, or use camera to get an image.

In 'Documents', when user clicks on '+', he/she gets the option to either view Dropbox and select the document to be downloaded into app, or the user gets to enter the URL of any document which he/she can copy from elsewhere and paste here to browse, open and download the document into the app.

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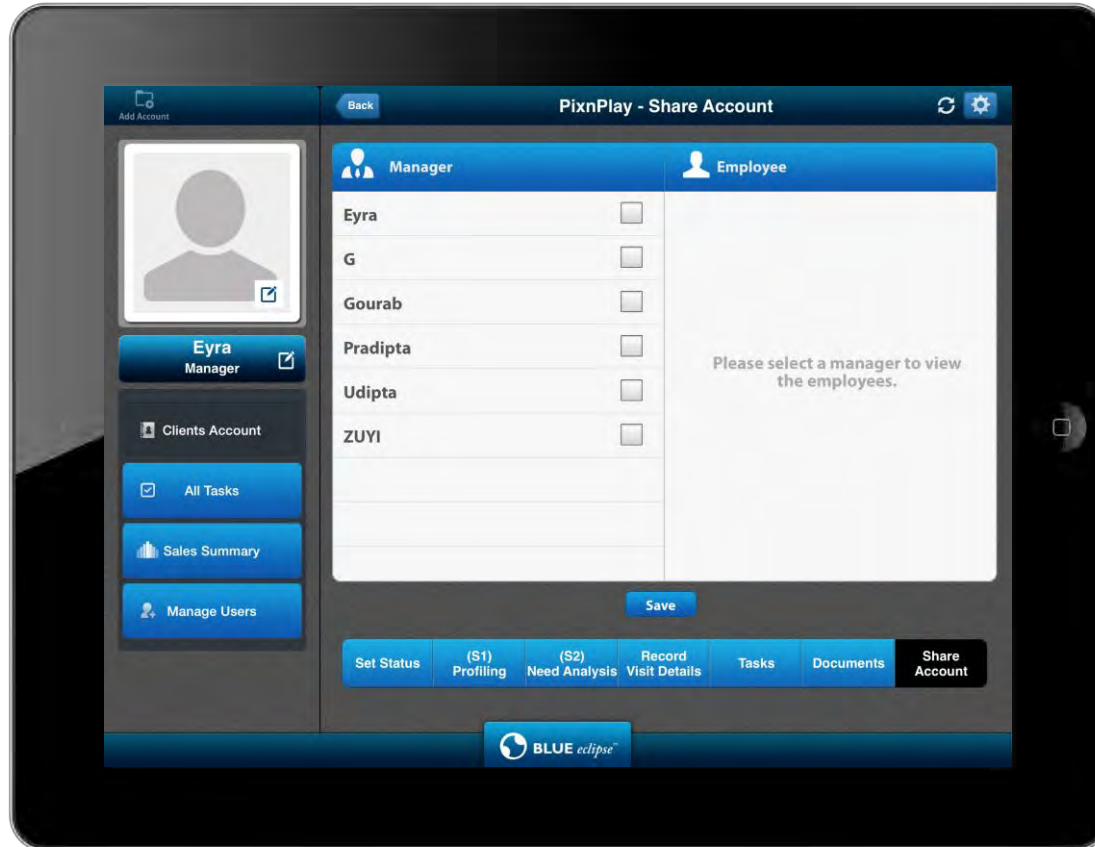


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## Share Account

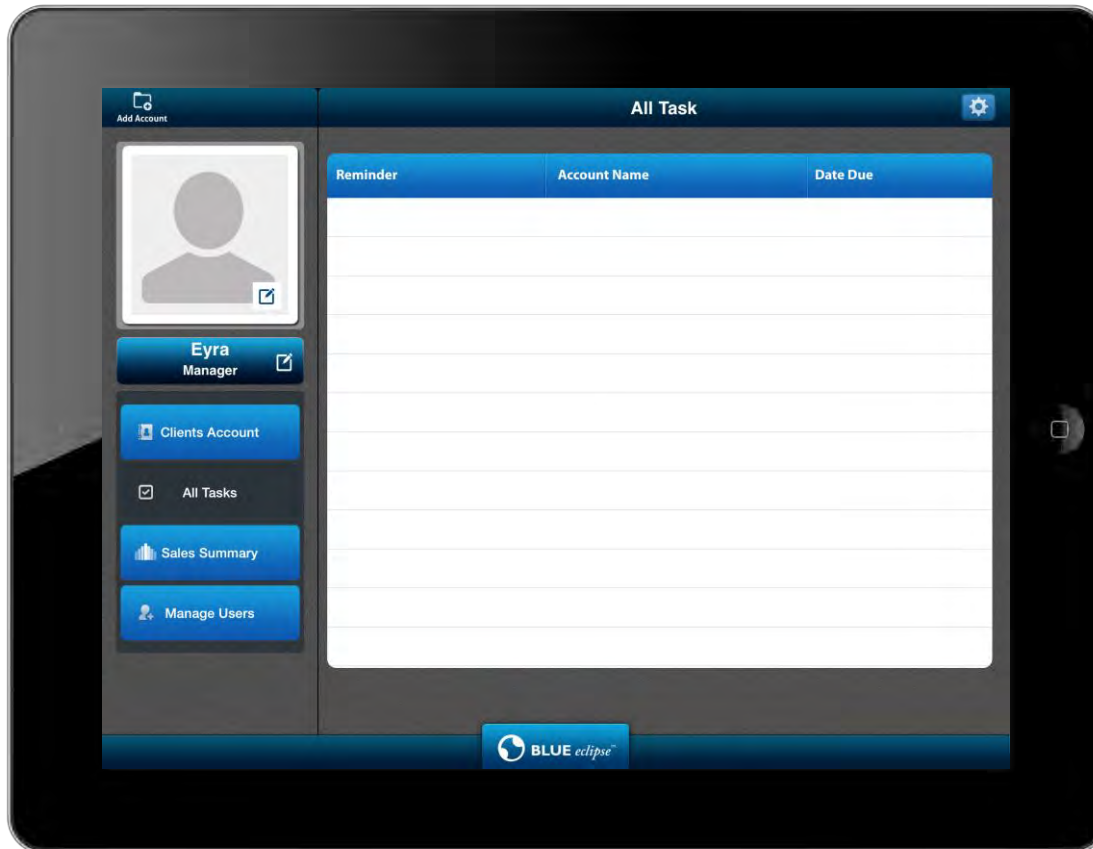
This is an option only available to a Manager. If user clicks on Share Account, the list of managers and their corresponding teams of Sales Employees open up in two consecutive panels. Here, the user can select the managers with whose team members he/she would like to share that account with.



The selected manager's team members get populated in the next panel as and when the user selects the manager. From there the user can further select the Sales Employees for sharing the account.

## All Tasks

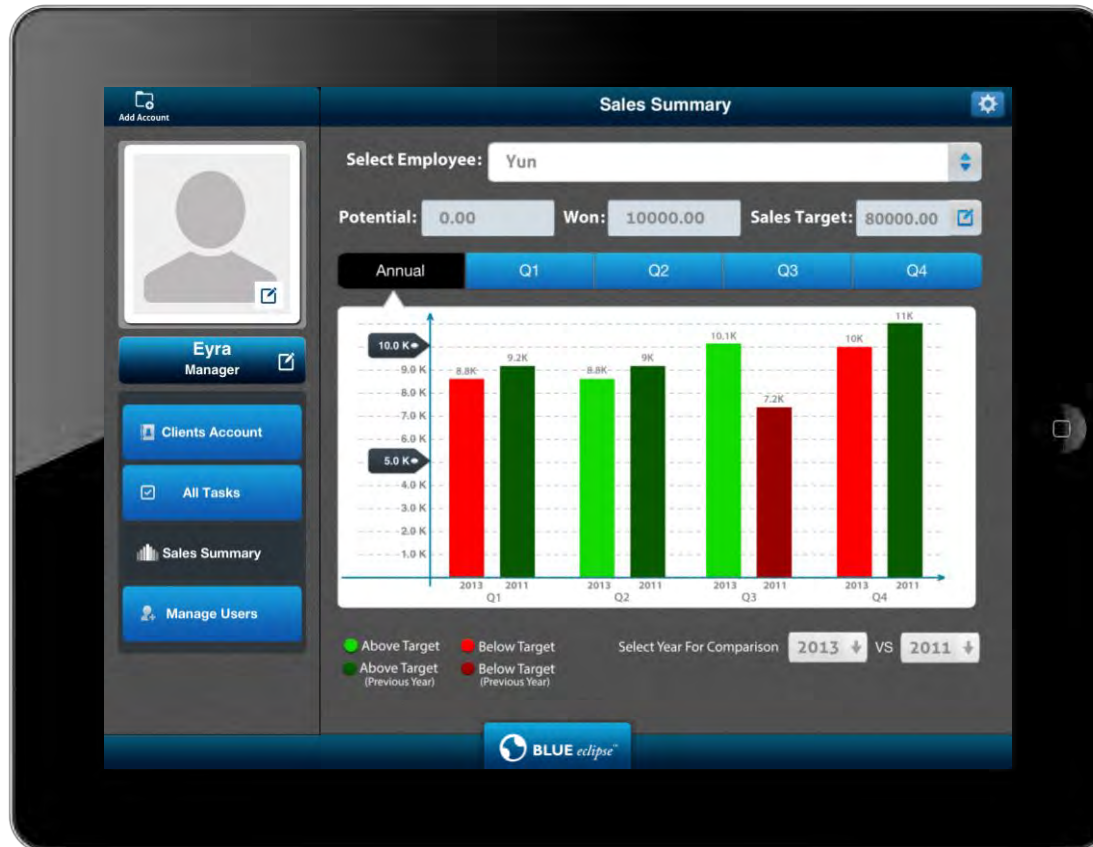
On selecting All Tasks, the detailed list of pre-existing tasks added by the user earlier, along with the reminder message, Account Name, and the date and time of reminder get displayed. When the user swipes on a task, an 'edit' option shows up on the right, clicking on which the screen to add 'Task' opens.





## Sales Summary

On selecting Sales Summary, the Manager gets to select the employee for whom he/she wants to view the summary of the total potential, won, and sales target for that Employee get displayed; and the Sales employee Gets to view total potential, won, and Sales Target for all his/her existing accounts. A Manager can also view the current total sales won figure along with graphs for all sales employees in his/her team.

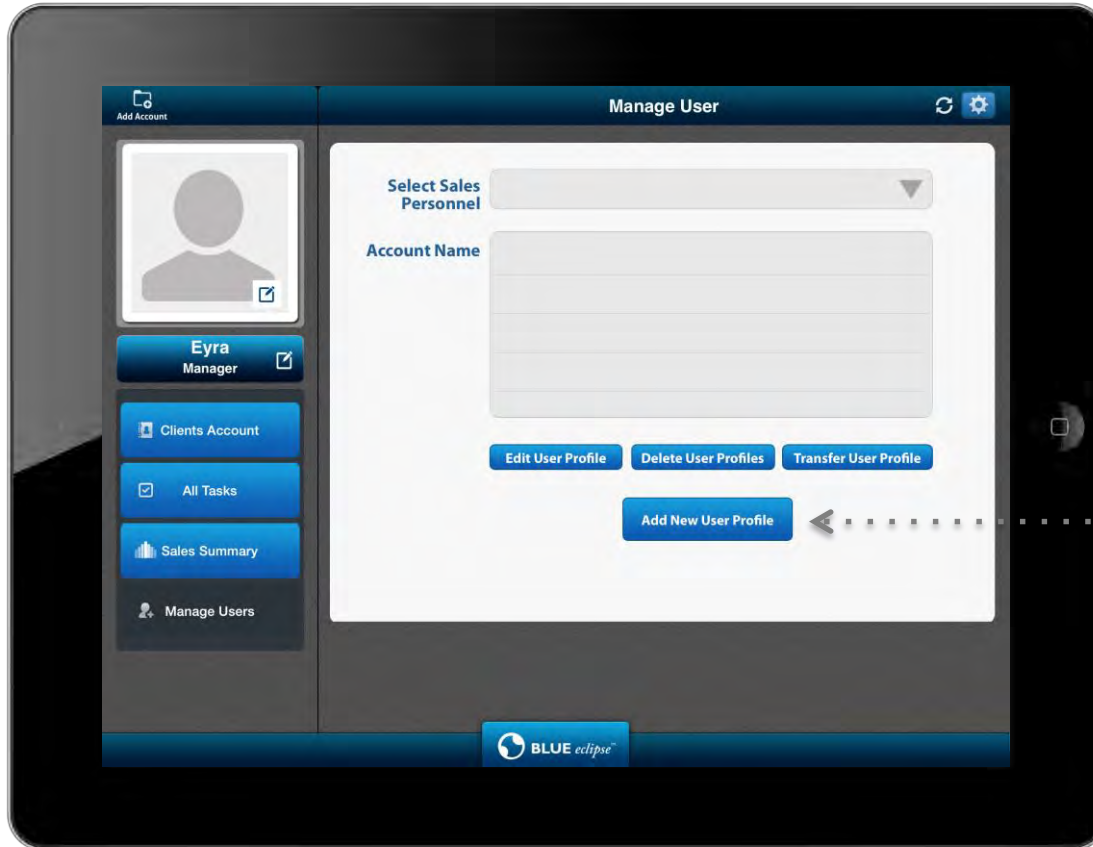


A bar-graph representation of the Sales Target VS Sales Won amounts with the option to compare the amounts of the current financial year with that of any previous financial year gets displayed. User can reset the sales target. The user can toggle between the different kinds of graphs – Annual Summary Report, and Q, Q2, Q3 and Q4 Summary Report.

## Manage Sales Employee Account

This is a section that only Managers can view. User can manage existing Sales Employee account. He/she can select an Employee, select an account and view, edit, delete, or transfer the user profile to a different Manager.

One Sales Employee can be under just one manager at a time.

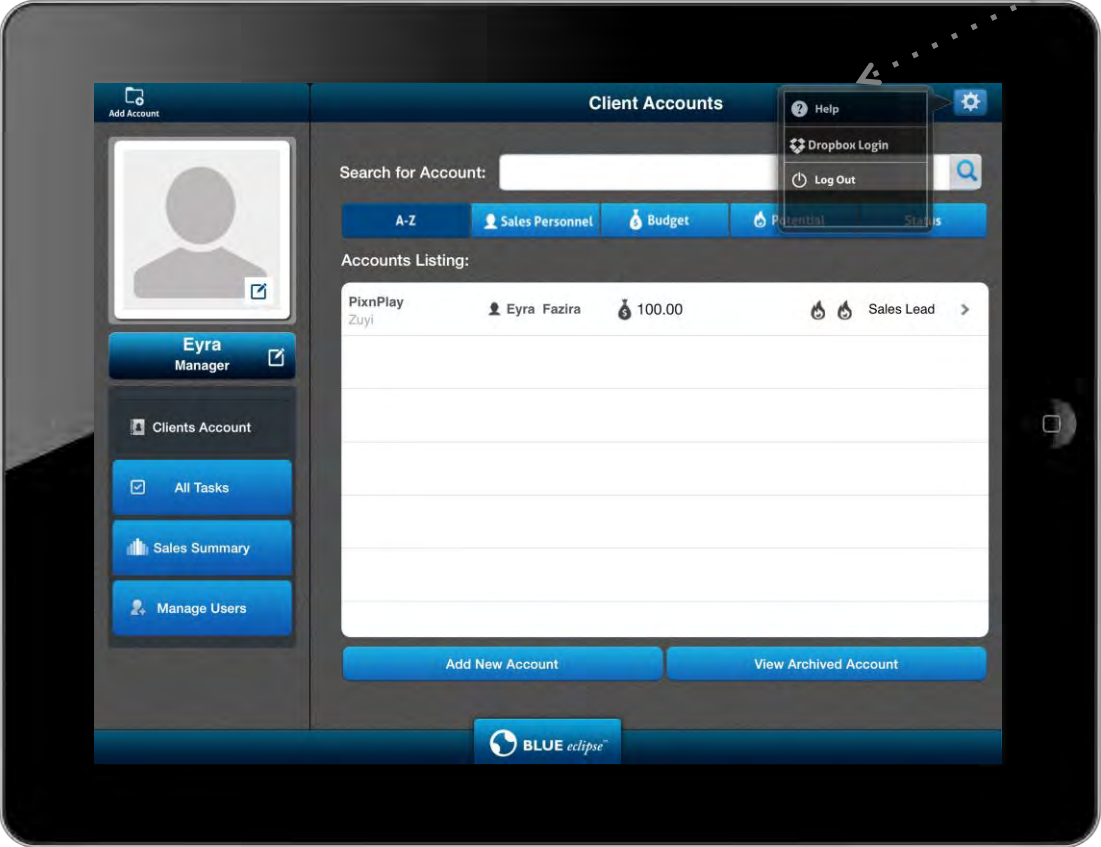


User can also Add New User Profile, clicking on which he/she will be redirected to the user profile creation screen.

When Manager clicks on Transfer User Profile for any Sales Employee, the screen for that Employee showing his/her name opens up. The Manager gets the option to choose the Manager to whom the profile is to be transferred, select the account name for which the transfer is to be made, and then confirm Profile Transfer. The user can also click on Manage Other Accounts to go back to the previous screen.

# Settings

The Settings option, when clicked, shows a drop-down with the options to view Help, Dropbox Login and Log Out.



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