

# Sales Reps SOLUTIONS

**Germane CRM** provides your sales reps with the tools they need to be effective and proactive. Your reps will have more power to access, share and search information on leads, accounts, quotes, tasks and assignments.

- Define your territories using any fields you want
- Override any territory assignment
- Setup one sales rep as a manager of multiple sales reps
- Give sales reps a password to view their leads, accounts, quotes, tasks
- Let them add notes and submit requests to you
- Make document libraries and other Microsoft Sharepoint data available
- Easily filter items by sales rep
- Make sales reps accountable for follow up
- Let sales reps receive text or email alerts about large quotes

Product	Unit Cost	Est Cost	Unit Price	Est Price	Profit	Gross Margin
Product1: Product Number 1	\$50.00	\$50.00	\$75.00	\$75.00	\$25.00	33%
Product2: Test Product #2	\$2.00	\$2.00	\$8.50	\$8.50	\$6.50	76%
Item1: Product #1 For Sale	\$50.00	\$50.00	\$85.00	\$85.00	\$35.00	41%
Item2: Product #2 For Sale	\$100.00	\$100.00	\$170.00	\$170.00	\$70.00	41%
Item3: Product #3 For Sale	\$150.00	\$150.00	\$255.00	\$255.00	\$105.00	41%
Item4: Product #4 For Sale	\$200.00	\$200.00	\$340.00	\$340.00	\$140.00	41%
Item5: Product #5 For Sale	\$250.00	\$250.00	\$425.00	\$425.00	\$175.00	41%
Item6: Product #6 For Sale	\$250.00	\$250.00	\$500.00	\$500.00	\$250.00	50%
<b>TOTAL</b>	<b>\$1,052.00</b>	<b>\$1,052.00</b>	<b>\$1,858.50</b>	<b>\$1,858.50</b>	<b>\$806.50</b>	<b>43%</b>

Product	Currency	USA	Profit	Commission	Gross Margin	Total Cost	Total Price
Product1-22	USD	15%	15%	15%	40%	\$100.00	\$181.82

Item	Description	Qty	Unit Cost	Est Cost	Unit Price	Est Price
Component #1		5	\$16.00	\$80.00	\$16.18	\$80.91
Component #2		1	\$90.00	\$90.00	\$90.91	\$90.91
<b>Subtotal</b>				<b>\$100.00</b>		<b>\$181.82</b>

**Inventory**

ITEM1 Serial #: 3572457457 ✔ Lot #: 2013-09

☐ I am done completing this inventory

**Compose Email**

To: John Smith <jsmith@company.com>

Cc: Ralph Williams <salesrep@email.com>

Bcc:

Subject: Your Quote

Attachments: ☒ Master Quote Format View Attach File

**Body**

Dear John Smith,

Attached you will find your quote.

Thank you,  
Customer Service Team

**Options** ☐ Request Read Receipt ☐ Request Delivery Receipt ☐ Normal Importance

Send Cancel

**Quote # 61**  
Quote Date: 1/14/2013  
Status: Open  
Valid For Days: 30  
Shipped:

**Bill To:**  
Wagman Latham  
1001  
Germane CRM  
123 Main St  
Ann Arbor, MI 48103  
United States  
(800) 910-8670  
(810) 572-8257  
latham@germanecrm.com

**Ship To:**  
Wagman Latham  
1001  
Germane CRM  
123 Main St  
Ann Arbor, MI 48103  
United States  
(800) 910-8670  
(810) 572-8257  
latham@germanecrm.com

Subtotal	Shipping	Tax	Total
\$7,225.00	\$0.00	\$433.50	\$7,658.50

Line #	Qty	Product	Description	Comm	Tax	Unit Cost	Unit Price	Selling Price	Est Price
1	10	Product1	Product Number 1	15%	✔	\$100.00	13%	\$85.00	\$850.00
2	5	Item1	Product #1 For Sale	15%	✔	\$100.00	13%	\$85.00	\$425.00
3	5	Item2	Product #2 For Sale	15%	✔	\$200.00	13%	\$170.00	\$850.00
4	5	Item3	Product #3 For Sale	0%	✔	\$300.00	13%	\$255.00	\$1,275.00
5	5	Item4	Product #4 For Sale	15%	✔	\$400.00	13%	\$340.00	\$1,700.00
6	5	Item5	Product #5 For Sale	0%	✔	\$500.00	13%	\$425.00	\$2,125.00

**Territory**

**Override** ☒

**Territory** OCP

**Sales Rep** Larry Dallas

**Email Address** ldallas@example.com

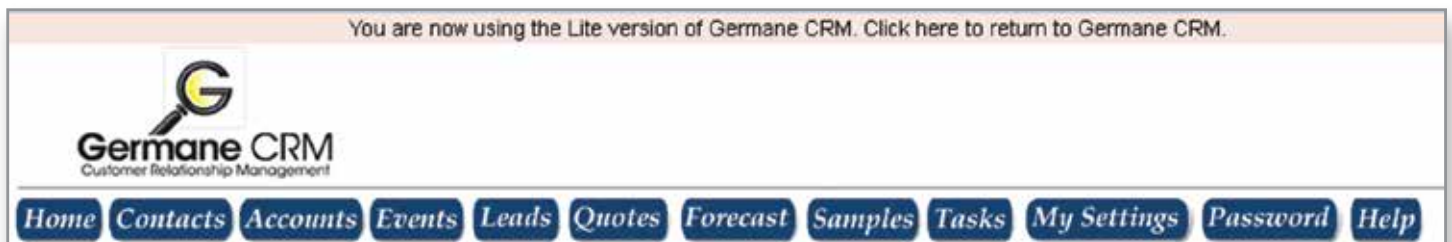
Type	Filename	Description	Actions
Attachments	Website: Germane CRM	Service sheet with shipping options for this customer	<span>Delete</span>
Attachments	2013080505	Test report	<span>Delete</span>

Attach File

# Lite Version vs. Full Version

**Germane CRM** users can be “Lite” users or “Full” version users, depending on which version meets your company’s demands.

Lite Version	Full Version
<ul style="list-style-type: none"> <li>Read-only access to most data</li> <li>Access only to the records assigned to them</li> <li>A very simple interface that is extremely easy to use</li> <li>Access to any CRM module can be controlled by user</li> <li>Only certain fields can be changed</li> <li>Lite users can add notes that you can read</li> <li>Lite users can choose to receive email or text message alerts for quotes assigned to them</li> <li>A Lite user can be setup as a manager of other Lite users so that they can view their records</li> <li>Lite users can download files from document libraries and other Microsoft Sharepoint data</li> </ul>	<ul style="list-style-type: none"> <li>Read and write access to all data</li> <li>Access to all records in the system, with the possibility of adding restrictions</li> <li>The full CRM interface with all features enabled</li> <li>All modules are available for use</li> <li>All fields can be changed</li> <li>Full users can view all notes and choose whether or not their notes are visible to Lite users</li> <li>Full users can choose to receive email or text message alerts for quotes</li> <li>Full users can view everyone’s records</li> <li>Full users can view all screens, including all the Lite screens</li> <li>Use of the Microsoft Outlook Add-in for syncing contact lists and saving emails into the CRM</li> </ul>



Date	Works	Bill To Company	Bill To City & State	Status	Total	Follow Up	Forecast Amount	Forecast Type	Forecast Date
3/5/2012		Germane CRM	Ann Arbor, MI	Open	\$150.00		\$0.00		
12/2/2011	Test3	Germane CRM	Ann Arbor, MI	Open	\$1,050.00	3/1/2012	\$410.00		

3/2/2012 2:29:00 PM, 1 (1)  
 Called the Customer  
 3/2/2012 9:24:00 PM, 1 (1)  
 Germane Requested  
 Test  
 3/2/7/2012 3:20:00 PM, Matthew Lufkin

Email Alerts	
Quote Minimum	\$1,000.00 Send me an email about quotes bigger than this
Text Alerts	
Quote Minimum	\$50,000.00 Send me a text about quotes bigger than this



Germane, L.L.C.  
Ann Arbor, MI

800-910-8670  
germanecrm.com

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