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USER MANUAL

(Products Promotions Process)

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1   Introduction

Surprises and exceptions are common in daily business. interSoln Workflow is a new generation of product, designed with flexibility in mind, to meet the needs of people who work in varying business situations.

interSoln Workflow allows business professionals to improve business processes through experimentation and learning. Teams can coordinate their work by building the work process, following the progression of the work, and authorised users can adapt the process when changes are required.

Organizations can equally well automate and manage formal office processes. . interSoln Workflow Portal come with the following modules:

A. Human Resource Process

- Leave Application
- Expense Application

B. Sales Tracking Process

C. Request For Quotation Process

D. Product(s) Promotion(s) Process

This document covers the usability of the Product(s) Promotion(s) Process module.

Please note the interSoln Workflow Portal HTML interface is totally customizable. But, the fundamental are the same.

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2   Getting Started

Before we proceed into the later portion of this user manual, you need to know the fundamental of the interSoln Workflow portal. The following sections shall guide you through these.

2.1   Login

Start your Internet Explorer and enter the interSoln Workflow URL in the address bar. You can get this information from your administrator. Login with the user name and password that is assigned to you by the same administrator.
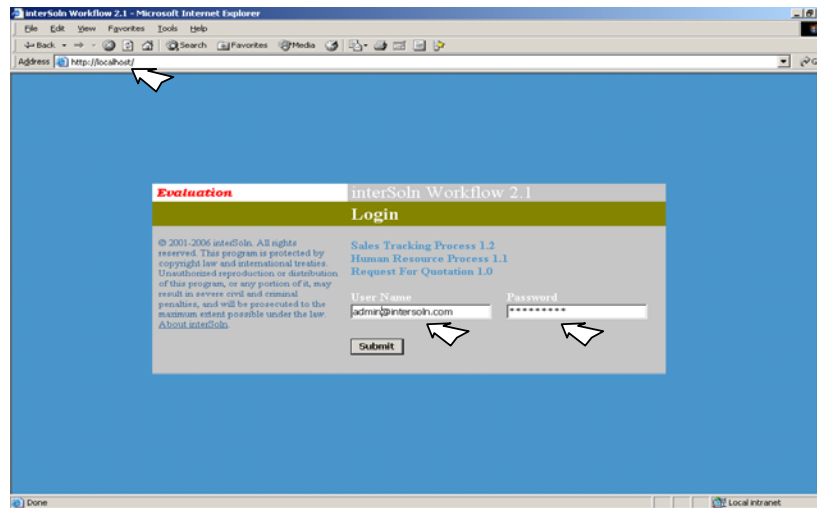

Figure 2.1a: Login Screen

Upon successful login, you'll see the following screen. Please take note of the location of the arrows below. The following section will detail how to manoeuvre through them.

1- Use to indicate current login user

2- Use to view current active business processes

3- Use to start new business template

4- Use to enter business details for active business processes

5- Use as filter to look at current active business processes

6- Use to indicate current system date

7- Use to enter preferences settings

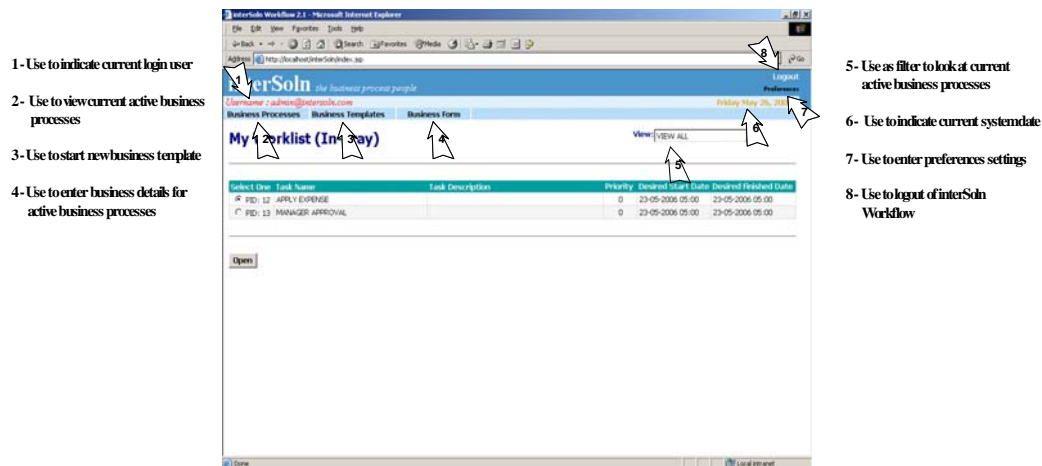8- Use to logout of interSoln Workflow

Figure 2.1b: My Worklist (In-tray) Screen

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2.2   Business Process Menu

To open your current task in a business process, move your mouse over the "Business Process" menu. A pop up window will indicate two options for you to select.

My Worklist (In-Tray)   –   Use to indicate all the active process the require your action now

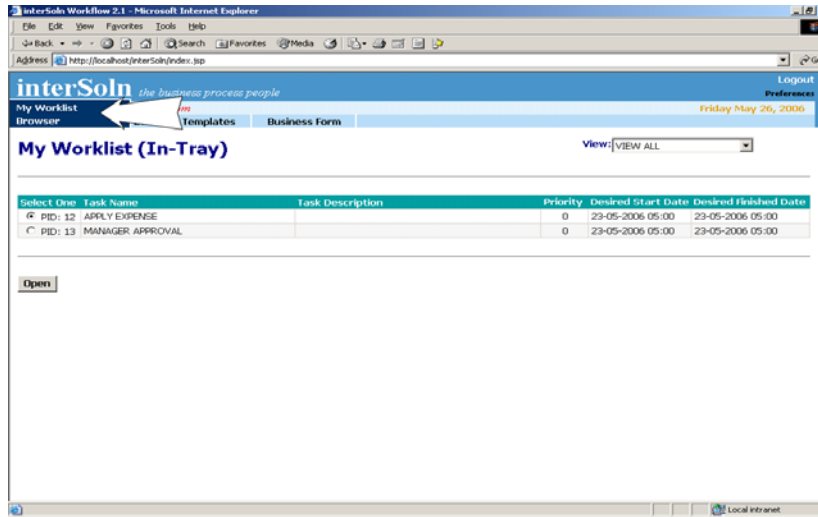Browser   –   Use to provide a graphical view of the business process that you're a participant of

Figure 2.2: Business Processes Pop-Up Screen

2.3   Business Template Menu

To start a new business request, click on the "Business Template" menu and depending on the rights that you've been given by your administrator, you'll be able to start different business request.
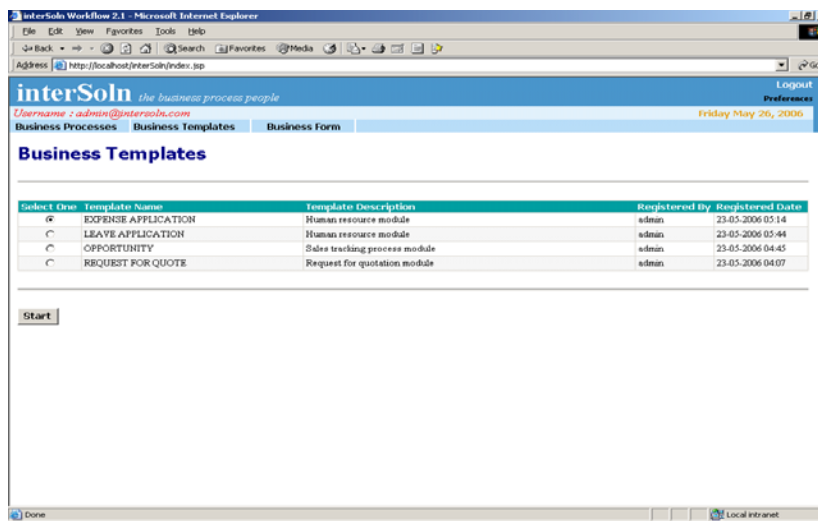

Figure 2.3: Business Templates Screen

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2.4   Business Form Menu

To share business details information pertaining to an active business process, move your mouse over the "Business Form" menu after you've open an active business process. A pop up window will indicate four options for you to select.

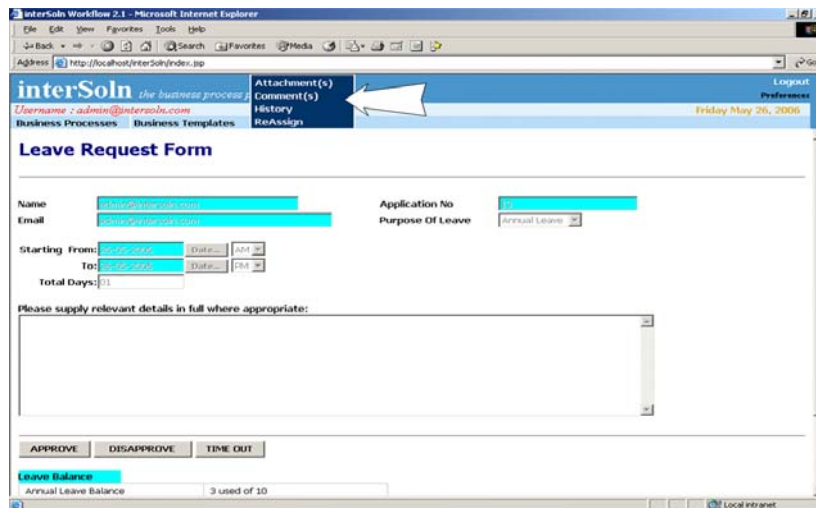|		
Attachment(s)	–	Use to add remove attachment to opened active business process
Comment(s)	–	Use to add comments on opened active business process
History	–	Use to provide a graphical view of the opened active business process
ReAssign	–	Use to reassign current task in opened business process to someone else in the interSoln Workflow user directory

Figure 2.4: Business Form Screen

2.5 Preferences Menu

To set your user and administration preferences, select "Preferences" from the top right hand side of the web page. Depending on your access rights given to you by your administrator, you'll be allowed different access to different option in the preferences menu.
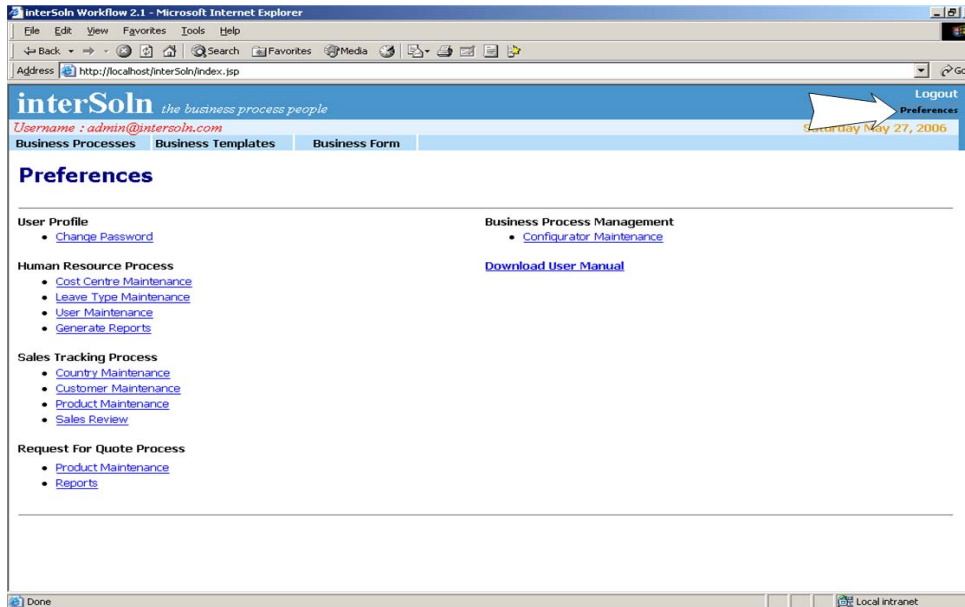

Figure 2.5: Preferences Screen

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3   Product(s) Promotion Process

The Product(s) Promotion Process allows a requestor to broadcast a list of selected product(s) to a specific group of customer(s) to inform them of the latest promotion and offers, notification of this promotion can be sent via email automatically.

Customer(s) can log into the interSoln Workflow portal to identify their interest in the promotion and request for a quotation.

Upon successful request for quotation from the customer(s), the sales persons can automatically track their sales opportunity and generate a quote to the customer(s) through the Sales Tracking Process.

3.1   Broadcast Promotion

To broadcast a new promotion, highlight "Product Promotion" from "Business Template" and click on the "Start" button. Upon successful request, the following screen will be shown.

You may start entering the details for the product(s) to be promoted by entering the necessary information specified below, select the "Submit" button to send the promotion out to your indicated customer(s).

Customer   –   Use to pop up a customer window for you to select the customer that has been allocated to you by your administrator. You can create/delete your own customer here as well.

Remarks   –   Use to add remarks to be shared with the customer(s)

Attachments –   Use to add/remove attachment to be shared with the customer(s)

Add   –   To add the product for promotion

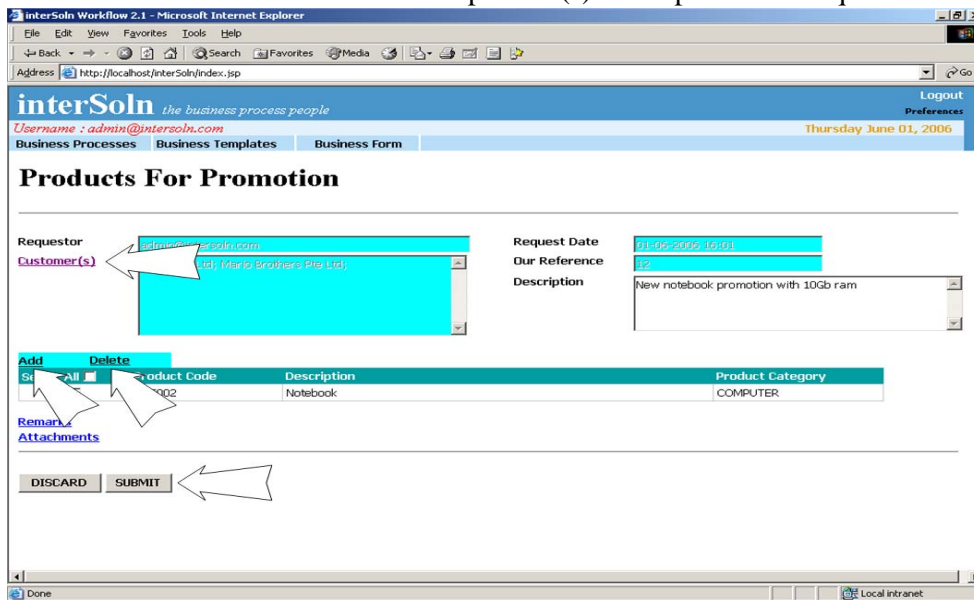Delete   –   To delete the selected product(s) in the promotion request

Figure 3.1a: Products For Promotion Screen

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Upon successful submission of the request for quote, the following screen will be shown.

To end all the promotion at any stage, select the "Promotion Ended" button. This will end all business processes that are related to this promotion.

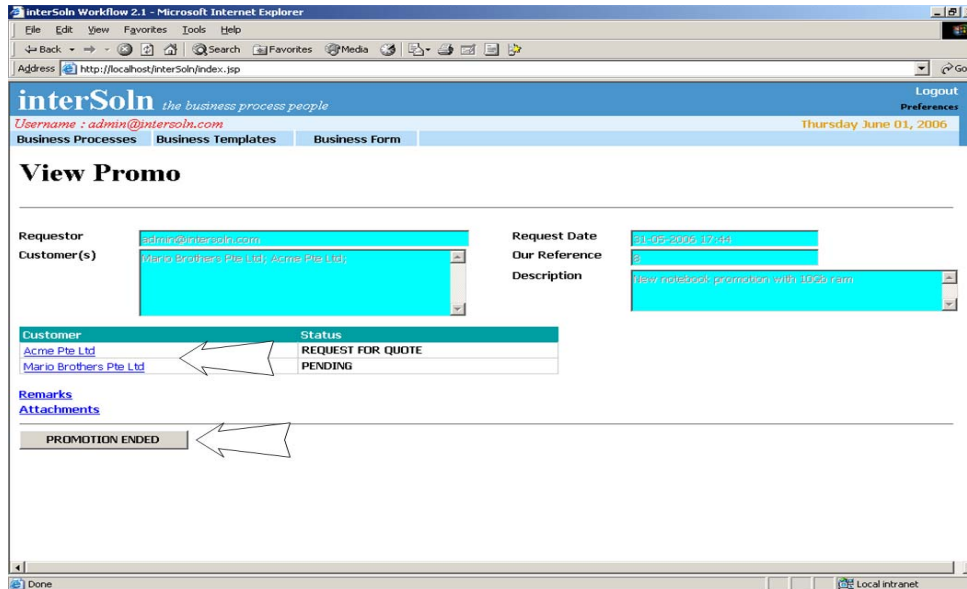You can also view or enact on the individual promotion by selecting the customer name.

Figure 3.1b: View Promo Screen

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At the final stage for the entire products promotion process, the following screen will be shown to the customer.
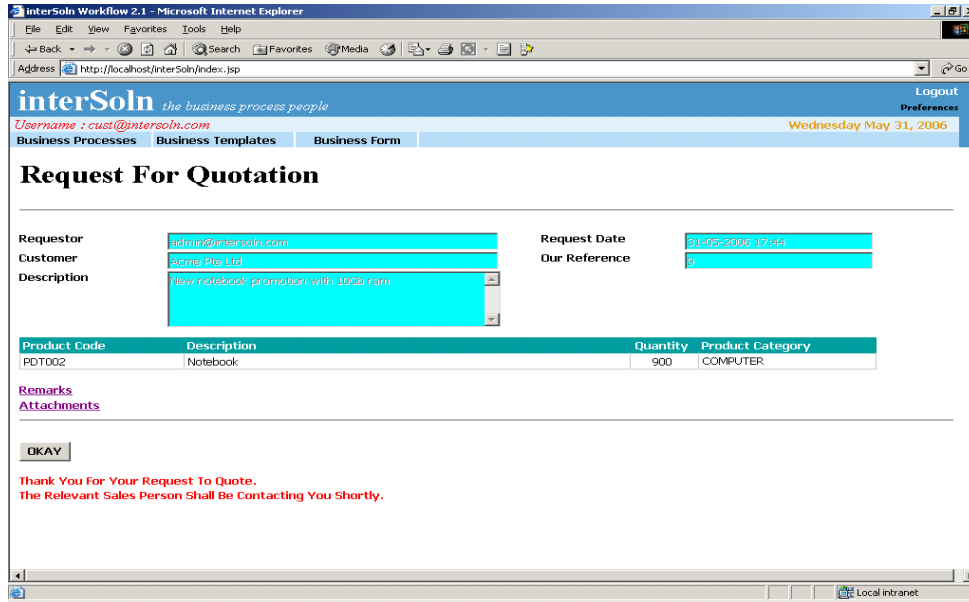

Figure 3.1c: Request For Quotation Screen

At the same time, an entry will be created in the sales tracking process (Please see below). This entry can only be seen by the relevant sales representative that has been assigned to the requesting customer.
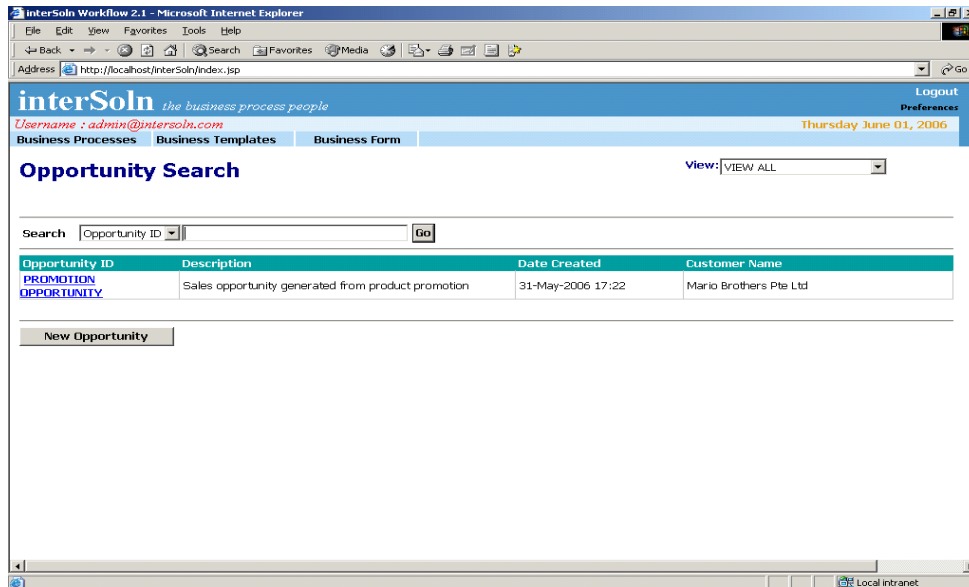

Figure 3.1d: Sales Opportunity Screen

--------------- **End of User Manual** ---------------