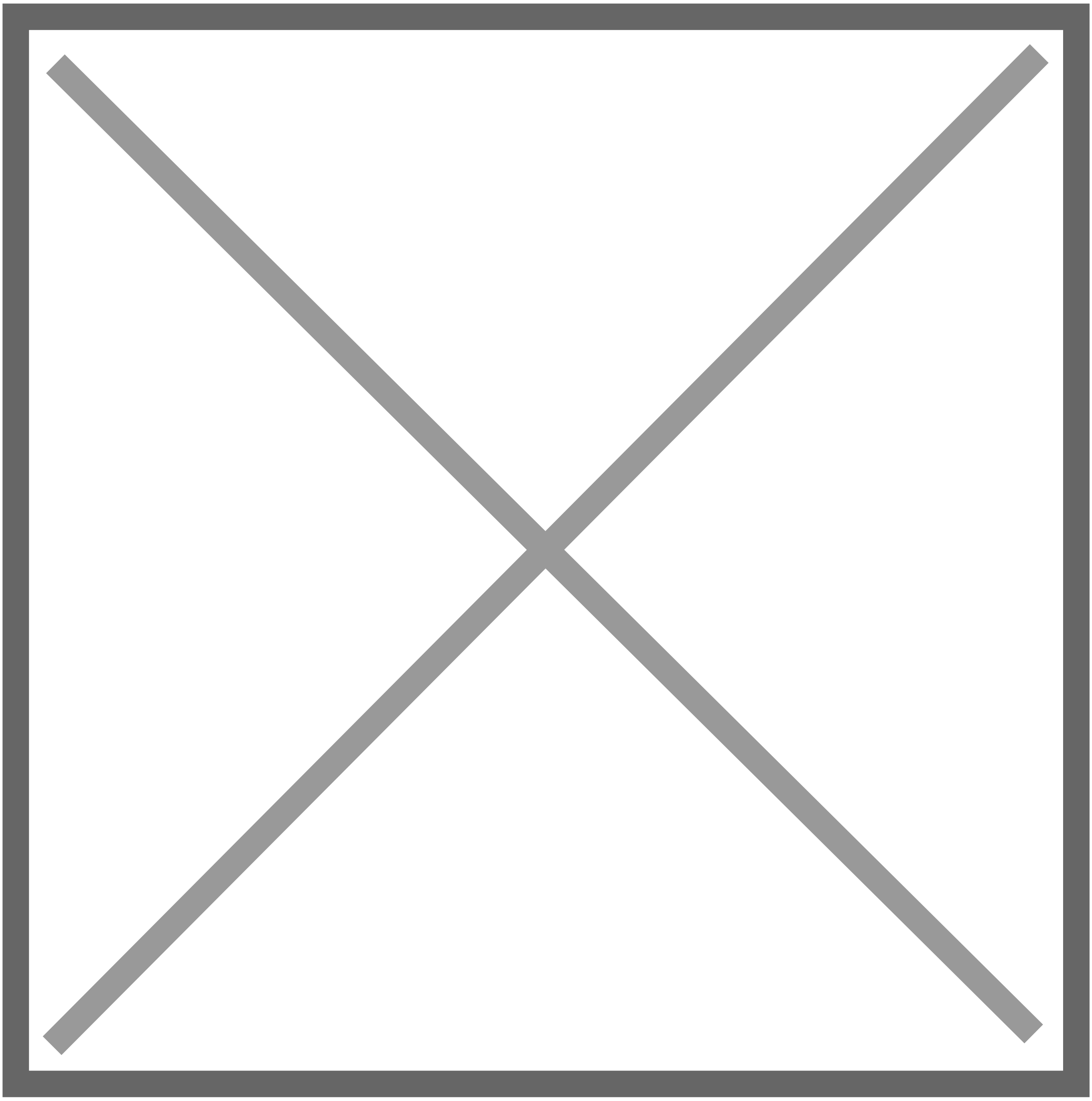
Sales

AOS (Advanced Open Sales) is the first set of advanced modules. It helps manage everything after a sales opportunity, like sending quotes, creating invoices, and handling ongoing contracts. These features are available through modules like:

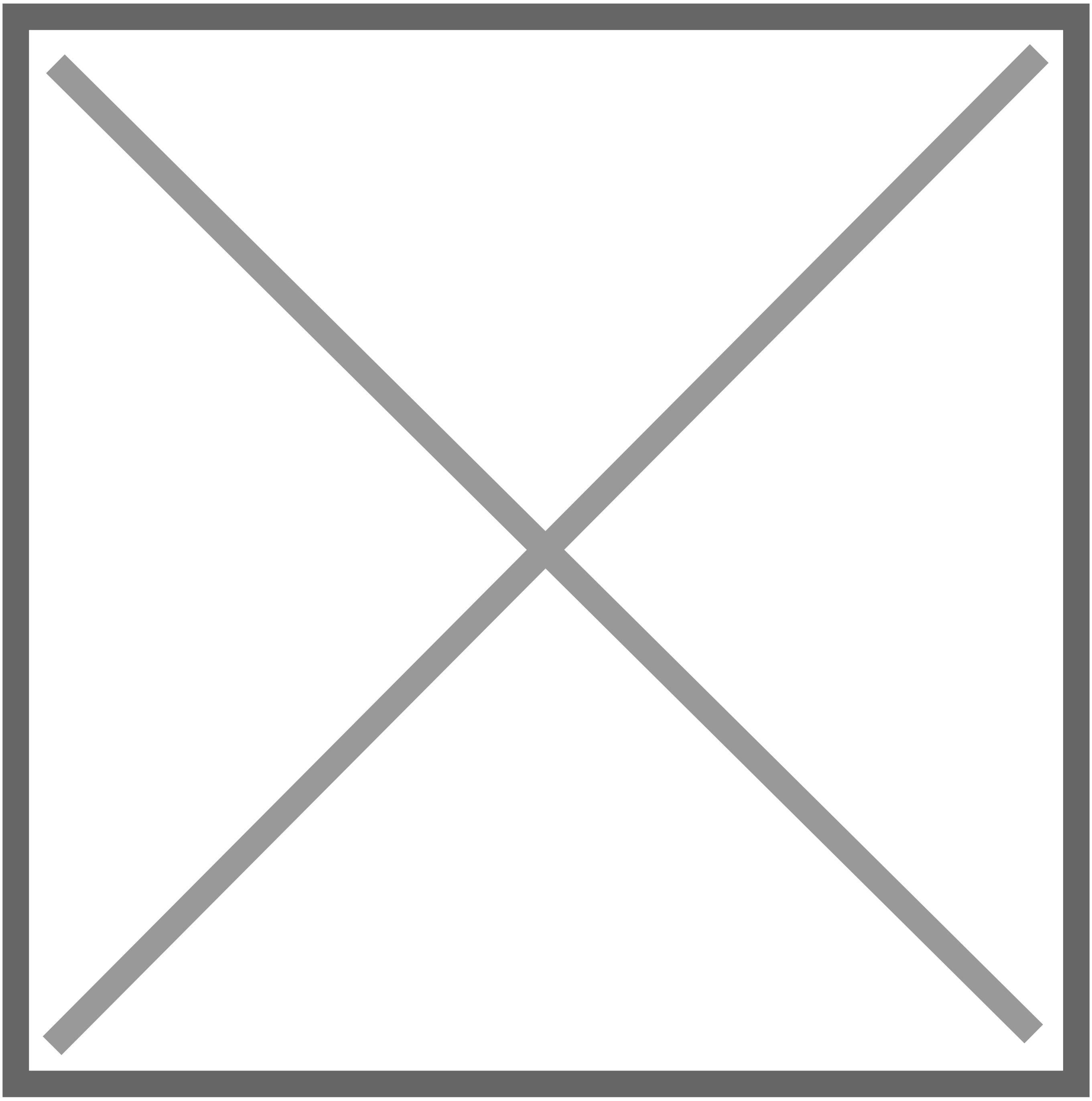
- Product Categories
- Products
- PDF Templates
- Quotations
- Invoices
- Contracts
- Payments

- ## Product Categories

The Product Categories module allows Users to structure Products into a hierarchical category structure. To create a Product Category record, navigate to the Product Categories module and click the 'Create Product Categories' button in the action bar.



The Parent Category field is a relationship field to another Product Categories record. If you check the 'Is Parent Category' field then this signifies that the category is the highest level. Once selected you will not be able to select a Parent Category using the related field

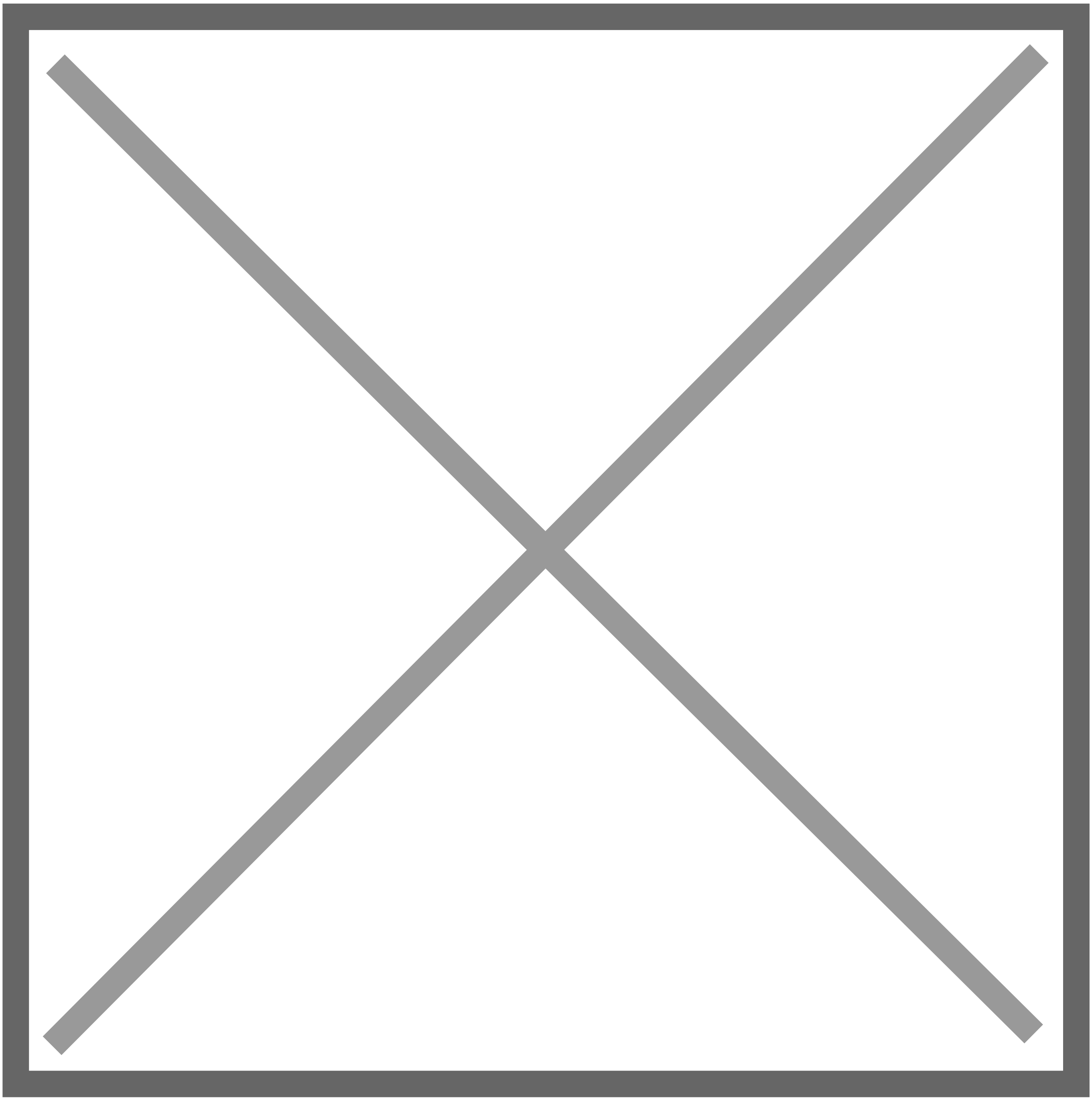


Note: Other features like Import, Filters, Column Chooser, Bulk Actions and Detail view Actions are similar to other modules. Refer Leads.

. Products

You can create Product records using the Products module. Creating products allows users to select product lines when preparing Quotes using AOS. The products module allows users to specify the Products Name, Part Number, Category and Type. Additional fields for Products can be added using

Admin settings.

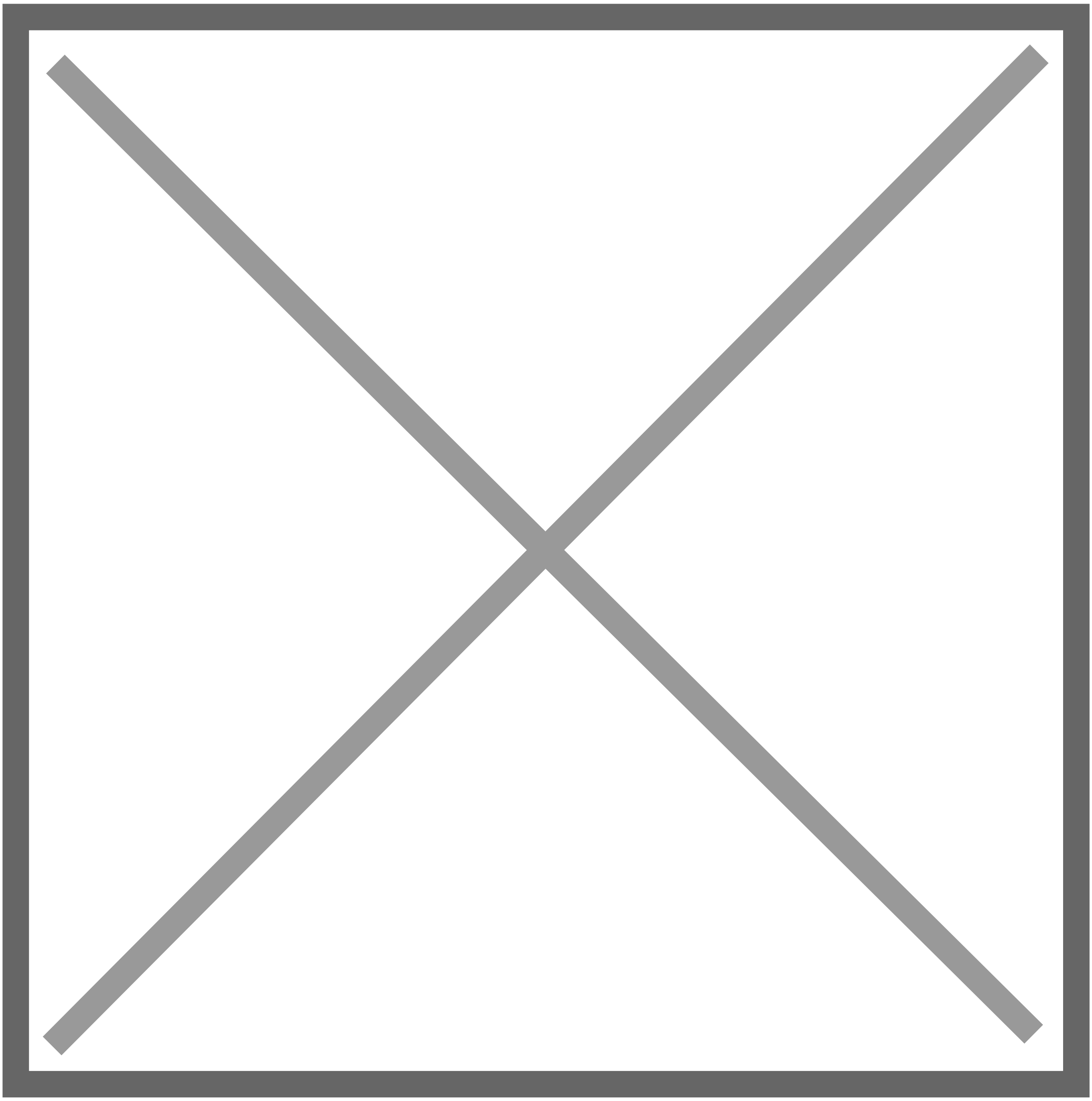


The module also allows users to define a Cost and Price for the product. Price is the selling price which will be used in the quoting process. A related Contact can be associated with the product. This is the point of contact with the supplier concerning this product. If you have an Image of the product then this can be uploaded within the products record. A URL to the products page on your website can also be specified.

Note: Other features like Import, Filters, Column Chooser, Bulk Actions and Detail view Actions are similar to other modules. Refer [Leads.]

.PDF Templates

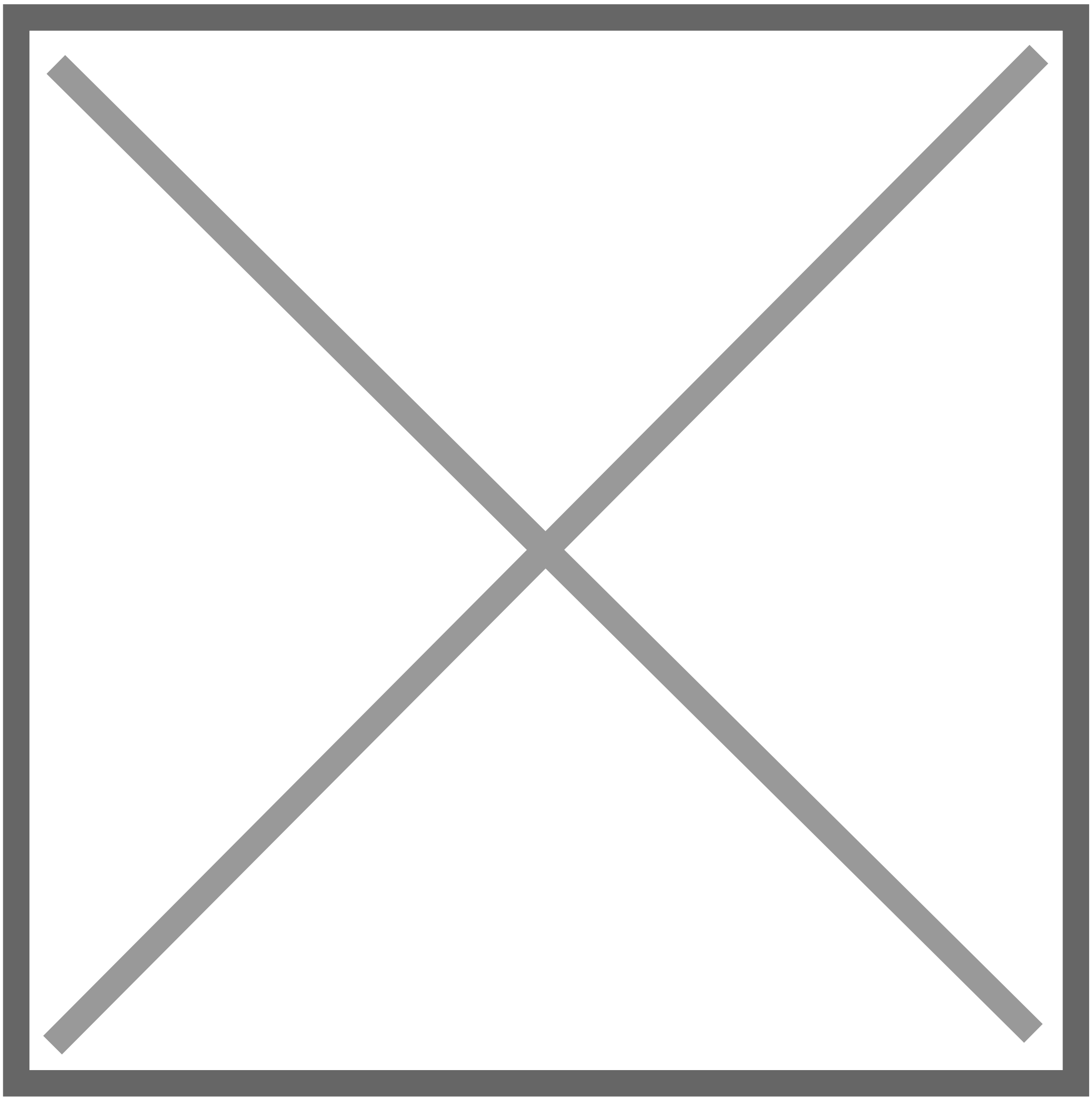
The PDF Templates module in CRM allows users to create and manage customized templates for generating PDF documents, such as quotes, invoices, contracts, and reports. These templates can include company branding, predefined layouts, and dynamic fields that pull data directly from CRM records, ensuring consistent, professional, and automated document generation. Please contact the support team for PDF template creation or updates.



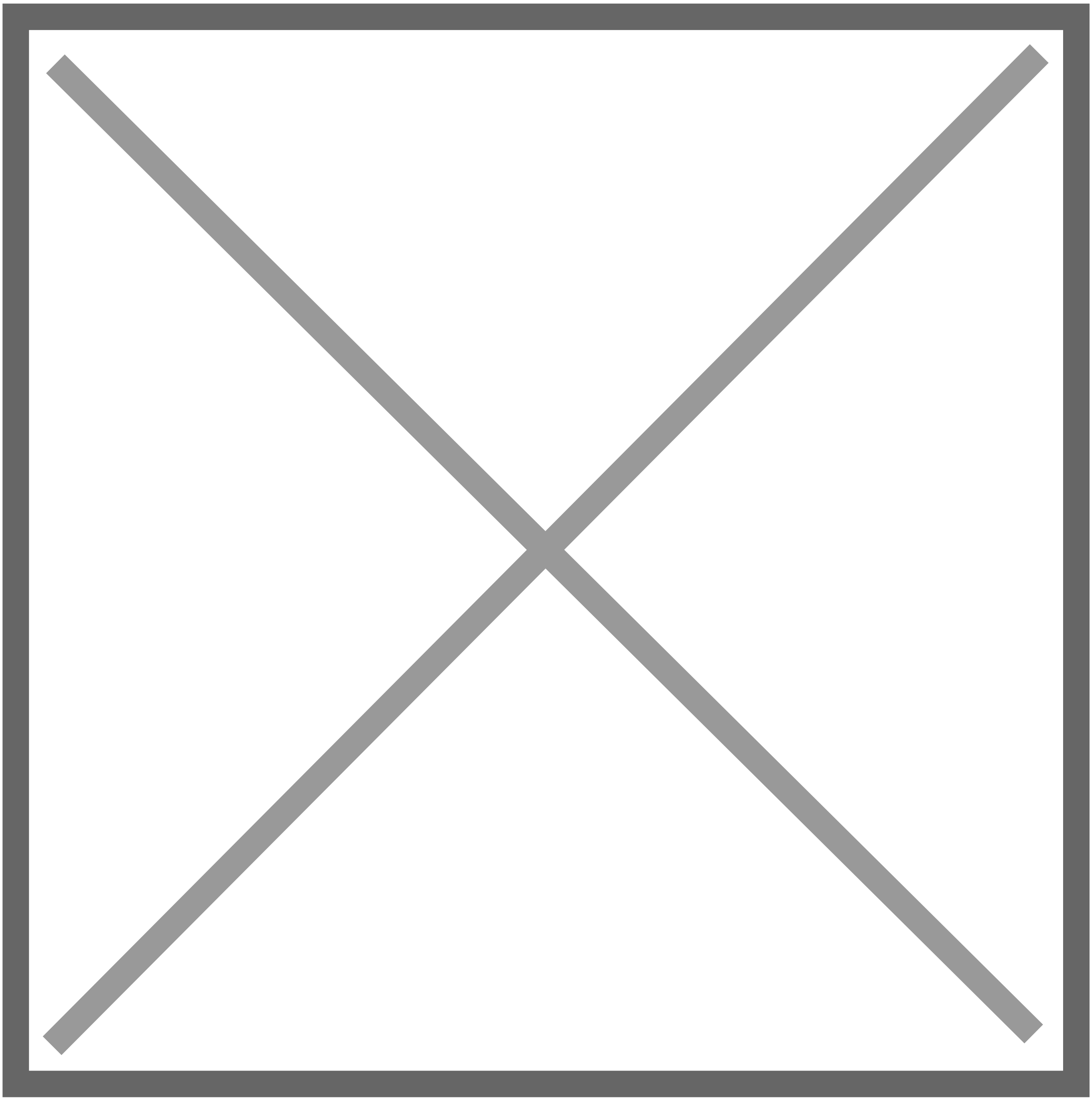
Quotations

Creating a Quote

You can create a Quote by going to the Quotes module and clicking 'Create Quote' from within the actions bar. The first panel allows you to specify details concerning the quote such as the Title, related Opportunity, Stage and Payment Terms. The Quote Number field is calculated automatically.



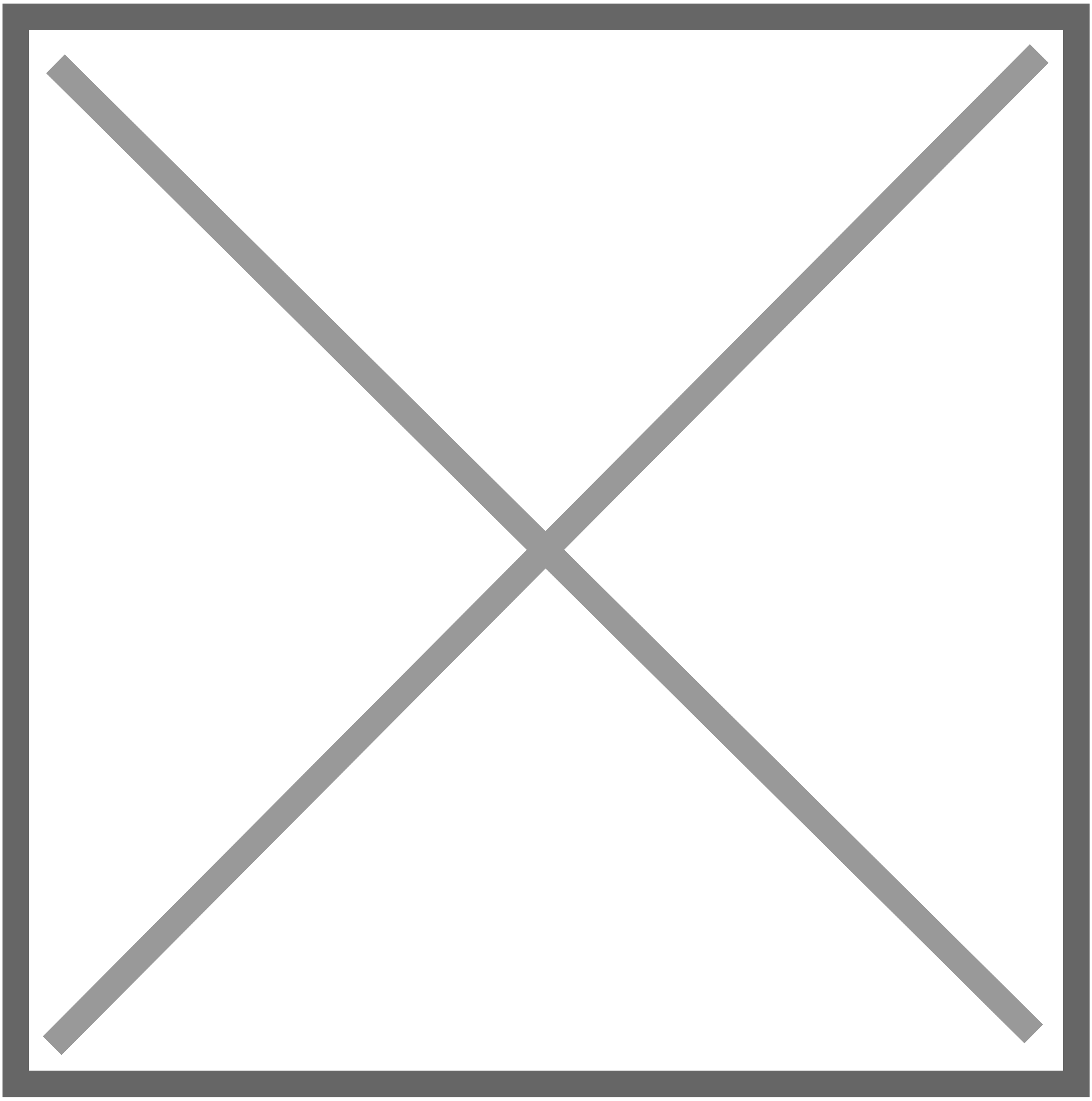
The second panel allows you to specify who the Quote is for by relating a Company and Contact to the Quote. When you select the Company, the Billing Address and Shipping Address are dynamically pulled from the Company and populated into the fields on the Quote record.



The third panel allows users to specify Line Items and the Currency. A Line Item can be a Product Line or a Service Line, each with its own details such as quantity, price, and description. The panel helps organize and calculate the total amount for the quote.

To add a Product Line, click on Add Product Line button and to add Service line click on Add Service Line button.

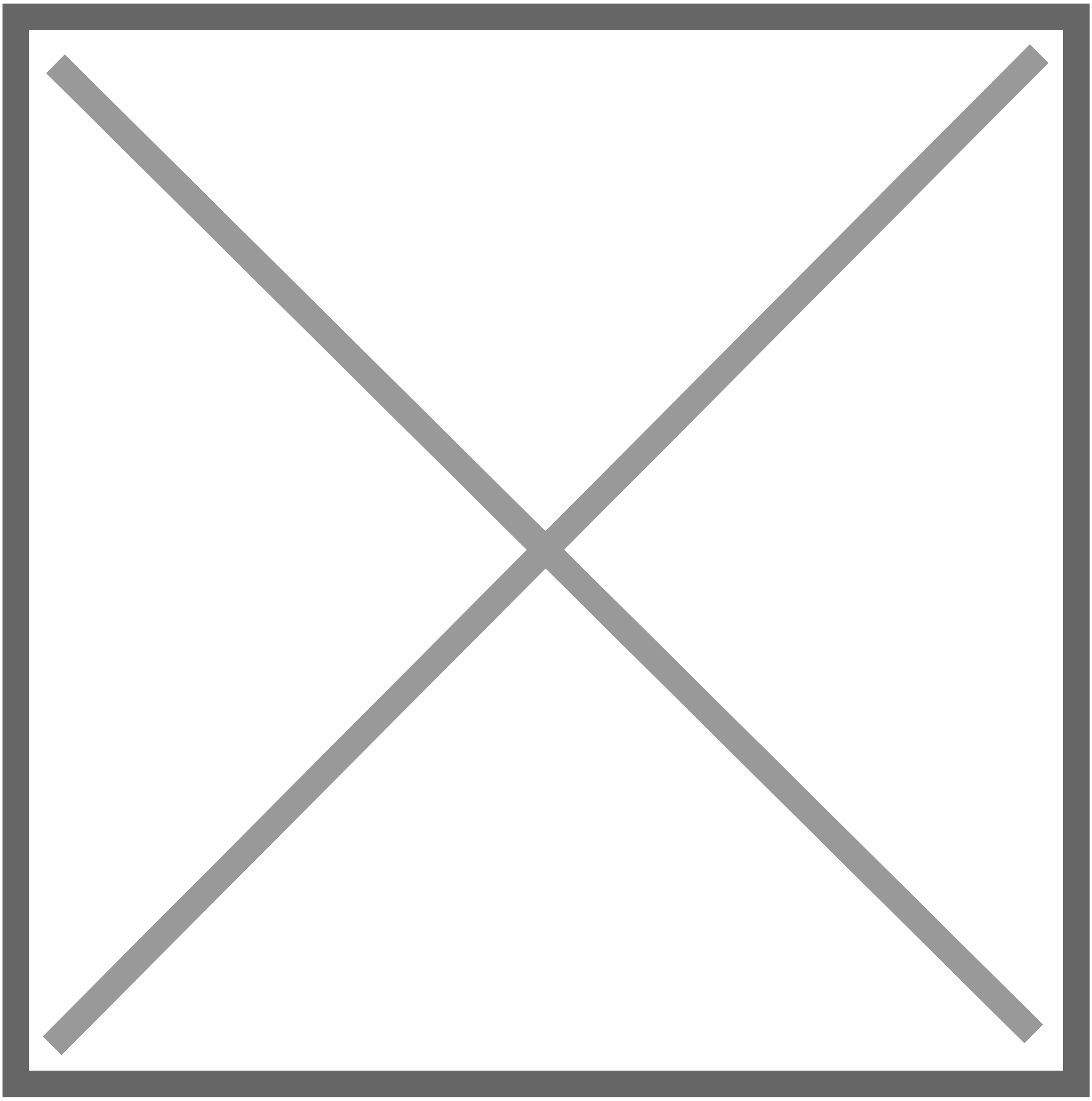
To select a Product, you can start typing in the Product or Part Number field which will provide a list of results similar to any related field. Alternatively click the arrow button next to the Part Number field. This will display a pop-up window allowing you to select from a list of Products.



Once you have selected a Product, the List, Sale Price and Total will populate automatically. You can change the Quality, add Discounts (Percentage or Amount) and increase the Tax percentage. These will alter the Sale Price, Total Price and Total fields.

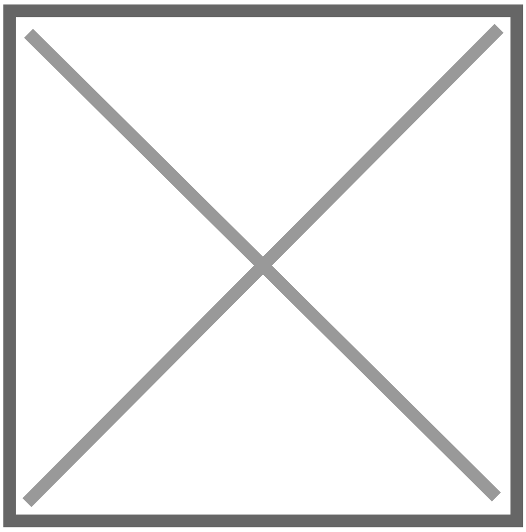
For Service Lines, you must specify the List price. This will populate the Sale Price. Tax and Discounts can be added similarly to the Product Line.

The Shipping field allows you to add a shipping cost. The Shipping Tax field allows you to add tax to this value. Once the Quote has been compiled, Click on Save to save the quote.



Sending Quotations / Detail View Actions

To output a Quote, you can select one of the following three buttons from the Quote Detail View.



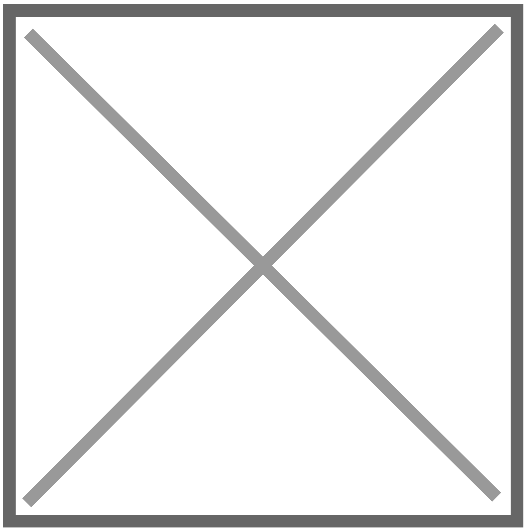
AOS provides users with three methods of sending Quotes:

- **Print as PDF** – Allows you to select a template and download or save a PDF of the Quote.
- **Email PDF** – Allows you to select a template then directs you to the KiyoCRM email client 'Compose' screen. The Quote PDF will be attached to email and the email will be addressed to the related Contact of the Quote. This allows you to fill out the email body.
- **Email Quotation** – This directs you to the KiyoCRM email client 'Compose' screen. The email will be addressed to the related Contact of the Quote. There will be no attachment, and the Quote will be displayed within the body of the email.
- **Create Opportunity** -- Create Opportunity from Quotation allows users to generate a new sales opportunity directly based on the details of a quote, ensuring a smooth transition into the sales pipeline.
- **Edit, Duplicate, Delete, Find Duplicates, View Changelog** are similar to other modules (Refere leads detail view actions for reference)
- **Convert to Invoice** – With AOS you can convert Quotes to Invoices. This can be achieved by clicking the 'Convert to Invoice' button on the Quote Detail View.

This functionality will redirect users to the Edit View of an Invoice record. Fields will be populated based on your Quote counterparts and Line Items will be copied over. When you are ready to create the Invoice, click the Save button. Converting a Quote to an Invoice will set the Invoice Status of the quote to 'Invoiced'.

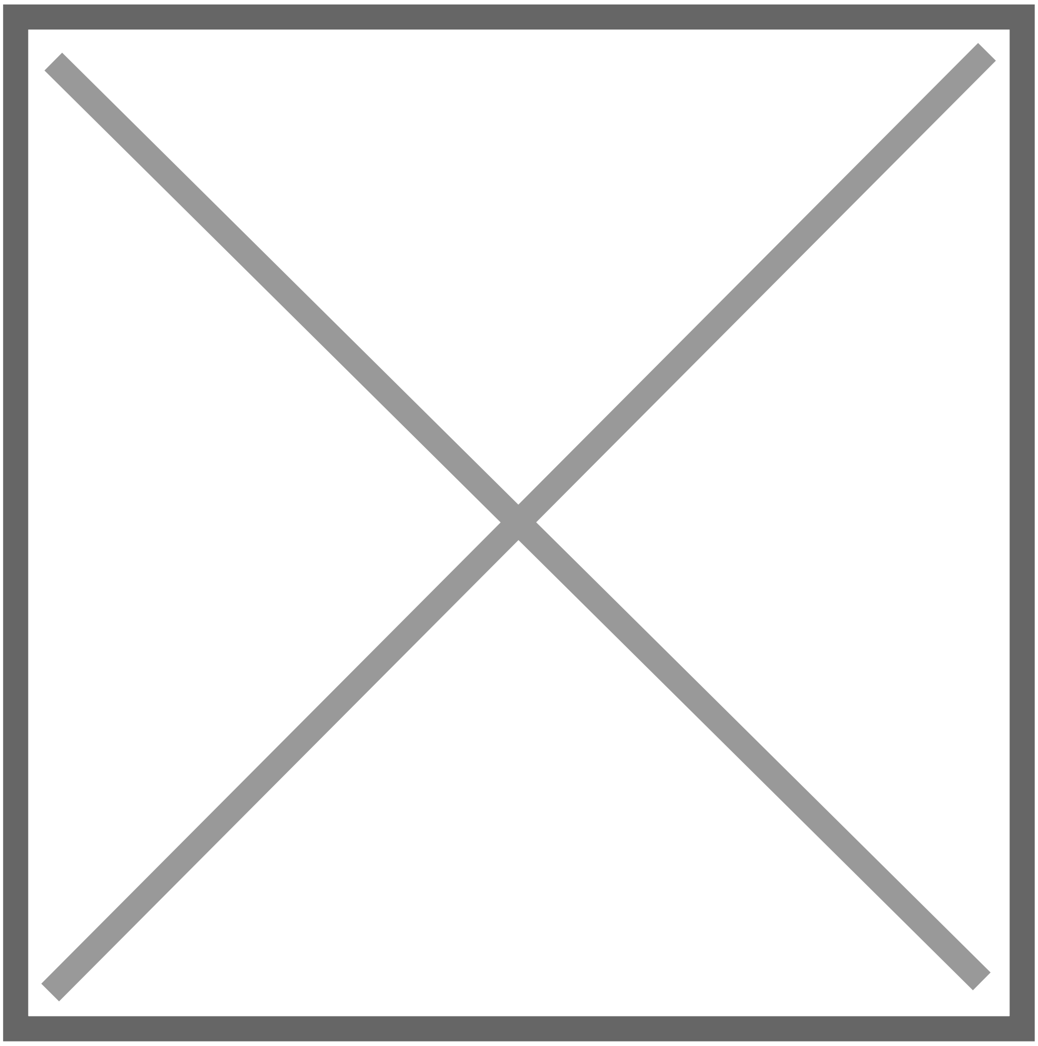
- **Create Contract:** As well as converting to an Invoice, AOS allows users to create a Contract based on a Quote. This can be done by clicking the 'Create Contract' button on the Quote Detail View.

This will redirect you to the Edit View of a Contract record, pulling through any appropriate fields from the Quote. This includes any Line Items on the Quote.



Bulk Actions

In list view, select group of records by checking the checkbox, the actions are as follows:

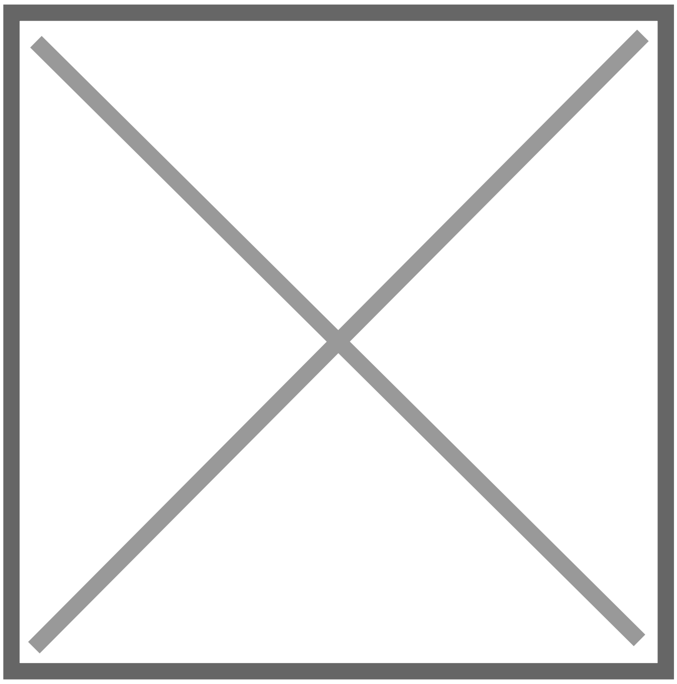


- **Mass Update:** Allows users to update multiple quote records at once, saving time on repetitive changes.

- **Export:** Enables users to download quote data in a structured format for reporting or offline use.

- **Delete:** Lets users remove one or more quote records from the system as needed.

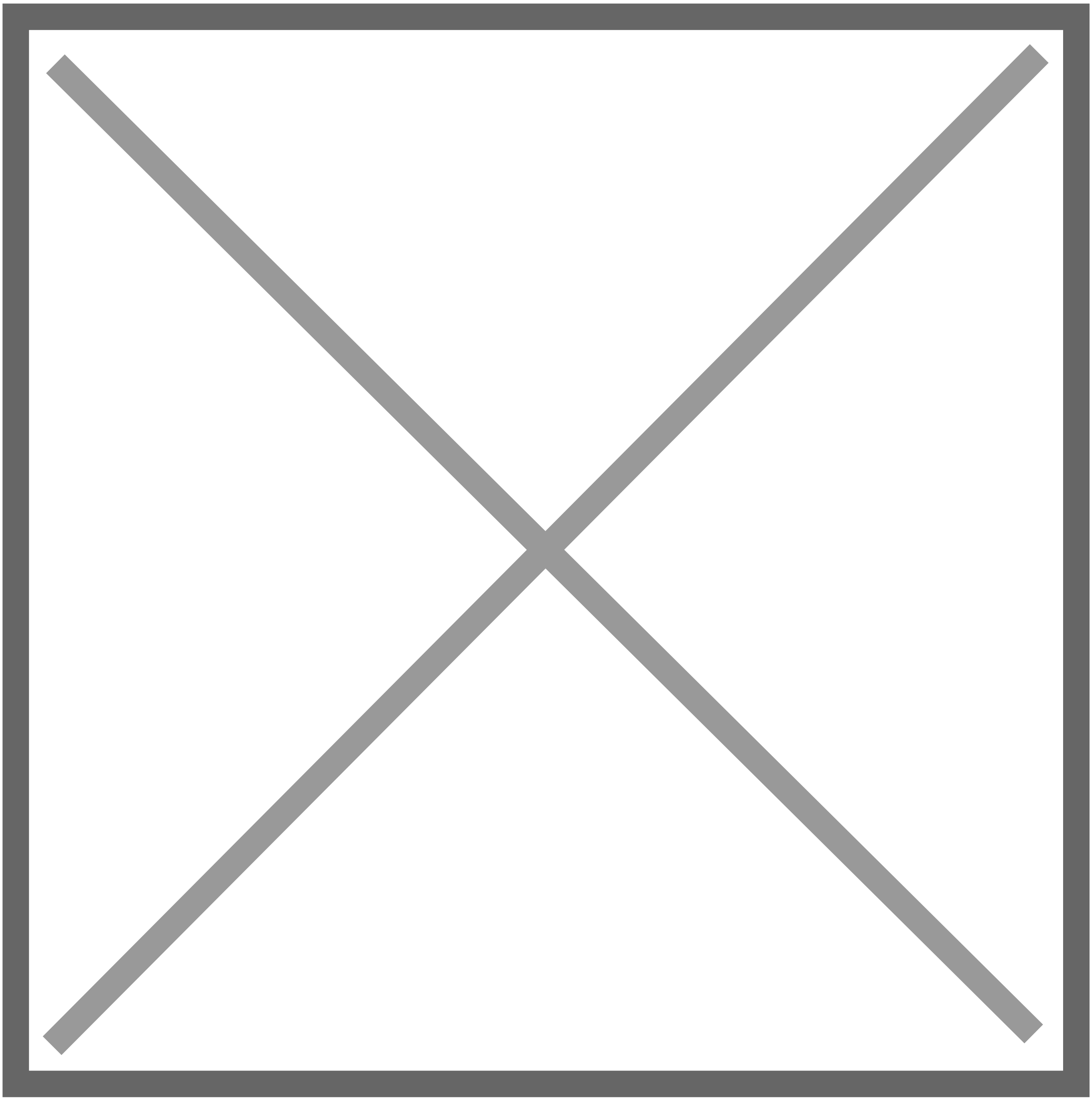
List View Page Actions



- **Import, Filter, Column Chooser functionalities** are similar to other modules. Refer Leads module Column Chooser, Filter and Import features.

- **Import Line Items**:-- Import Line Items feature in Quotes allows users to quickly add multiple products to a quote by uploading them from a file, streamlining the quote creation process.

Download sample file using **Download Import File Template**. Add data and upload file (.csv)



- To sort records on the Quotes List View, click any column title which is sortable. This will sort the column either ascending or descending.
- To search for a Quotes, Use Search engine on top
- Clicking on the pencil icon Quotes list view page to the display of record edit view.

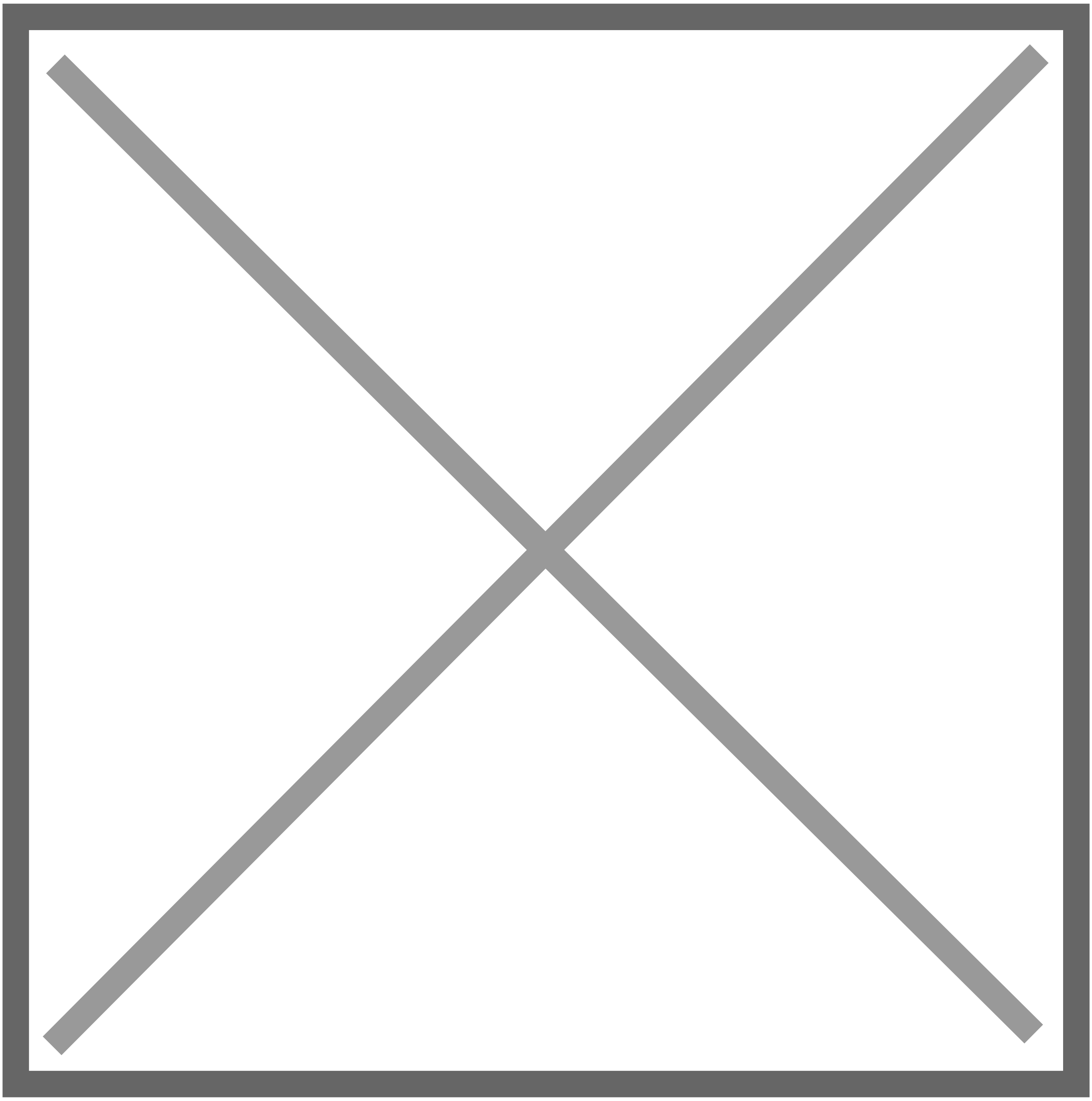
Quotes Submodules

Click on the detailed view of a Quote to view Submodules.

Contracts

The Contracts submodule under Quotes links approved quotes to contract generation, allowing seamless transfer of terms, products, and pricing into a formal agreement.

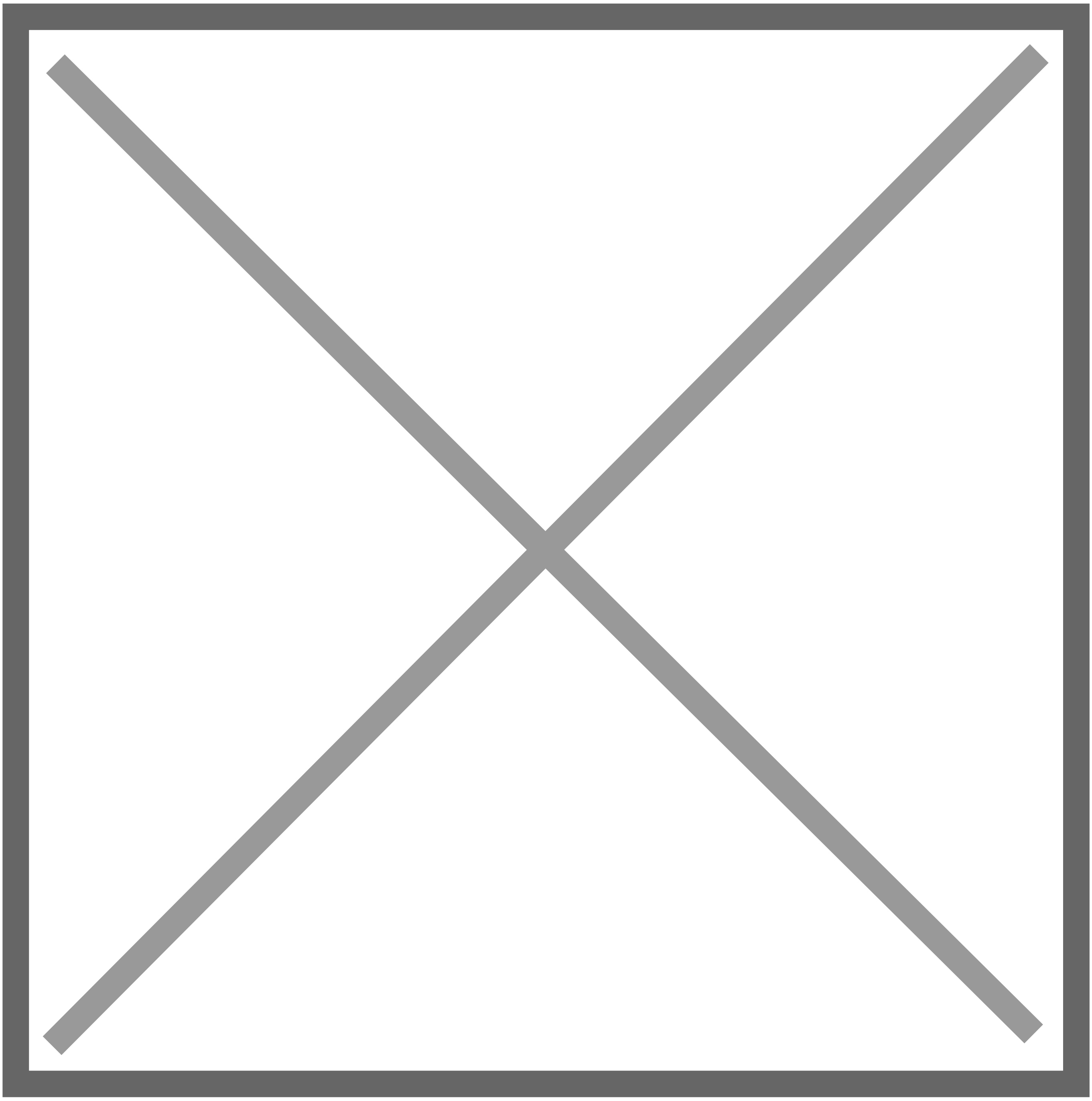
Can Create a new one or select from existing records.



Invoices

The Invoices submodule under Quotes allows users to generate invoices directly from approved quotes, carrying over all relevant billing details to streamline the payment process.

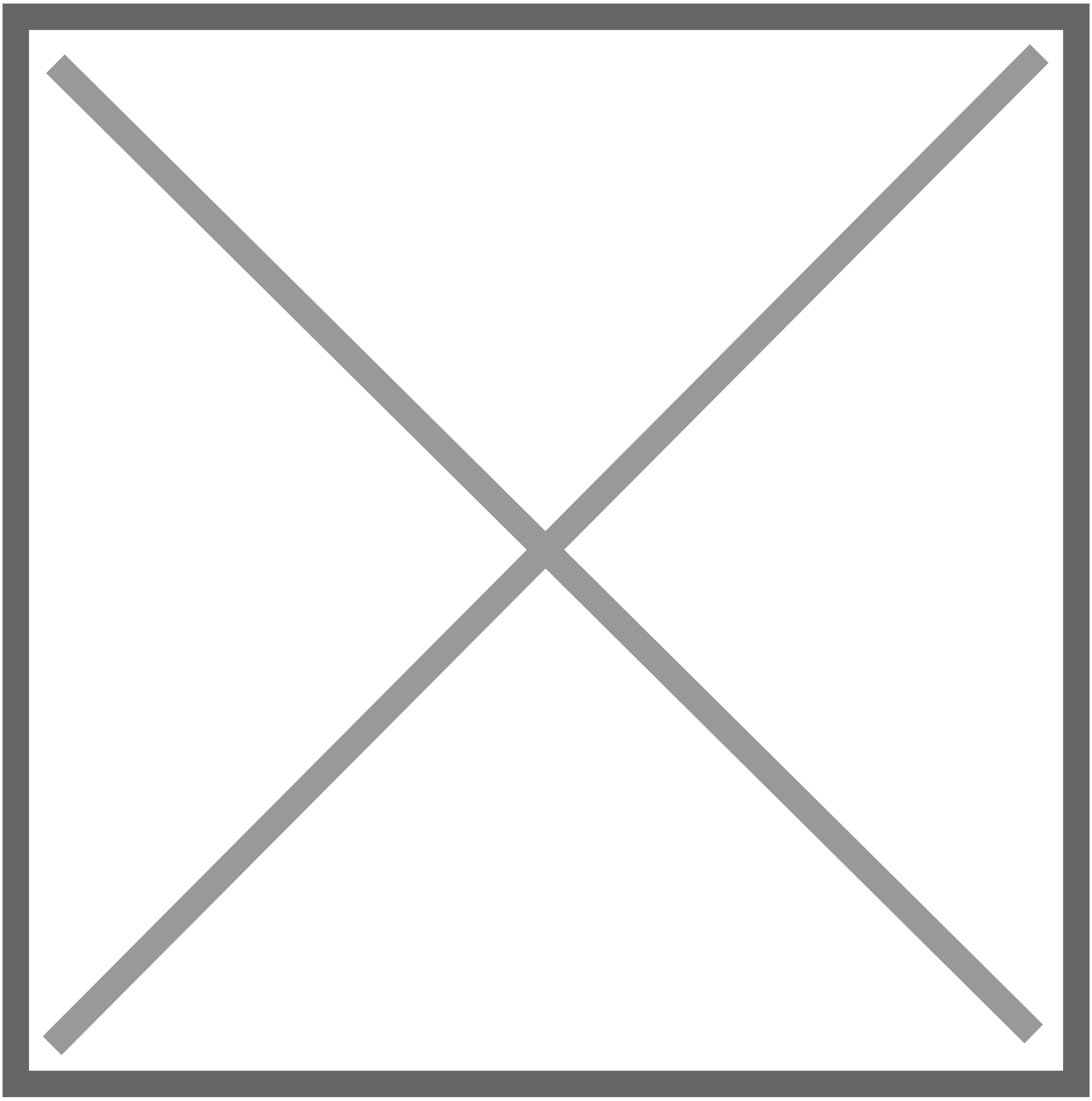
Can Create a new one or select from existing records.



Projects

The Projects submodule under Quotes links quotes to related projects, helping track the delivery of quoted products or services once the quote is accepted.

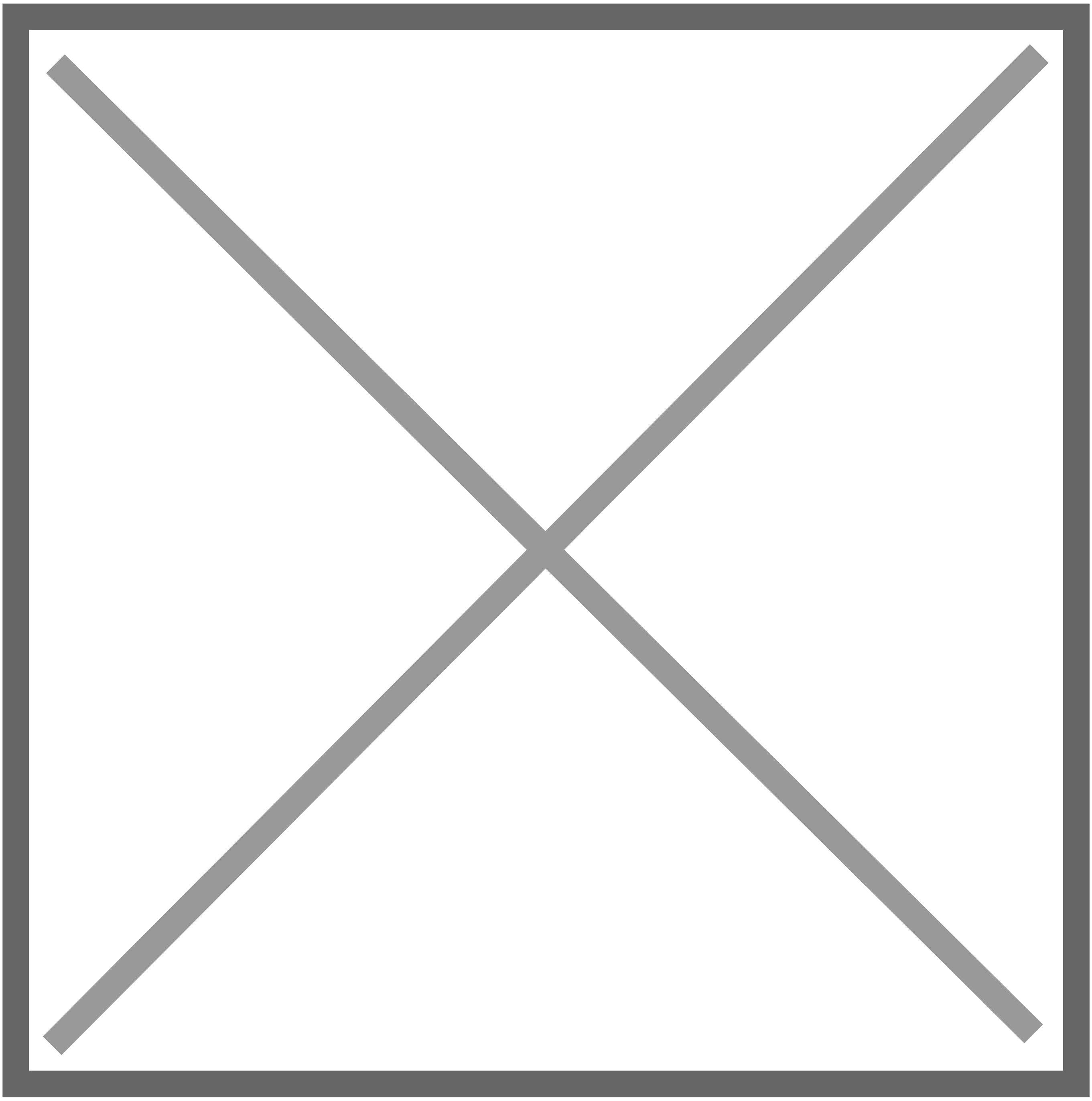
Can Create a new one or select from existing records.



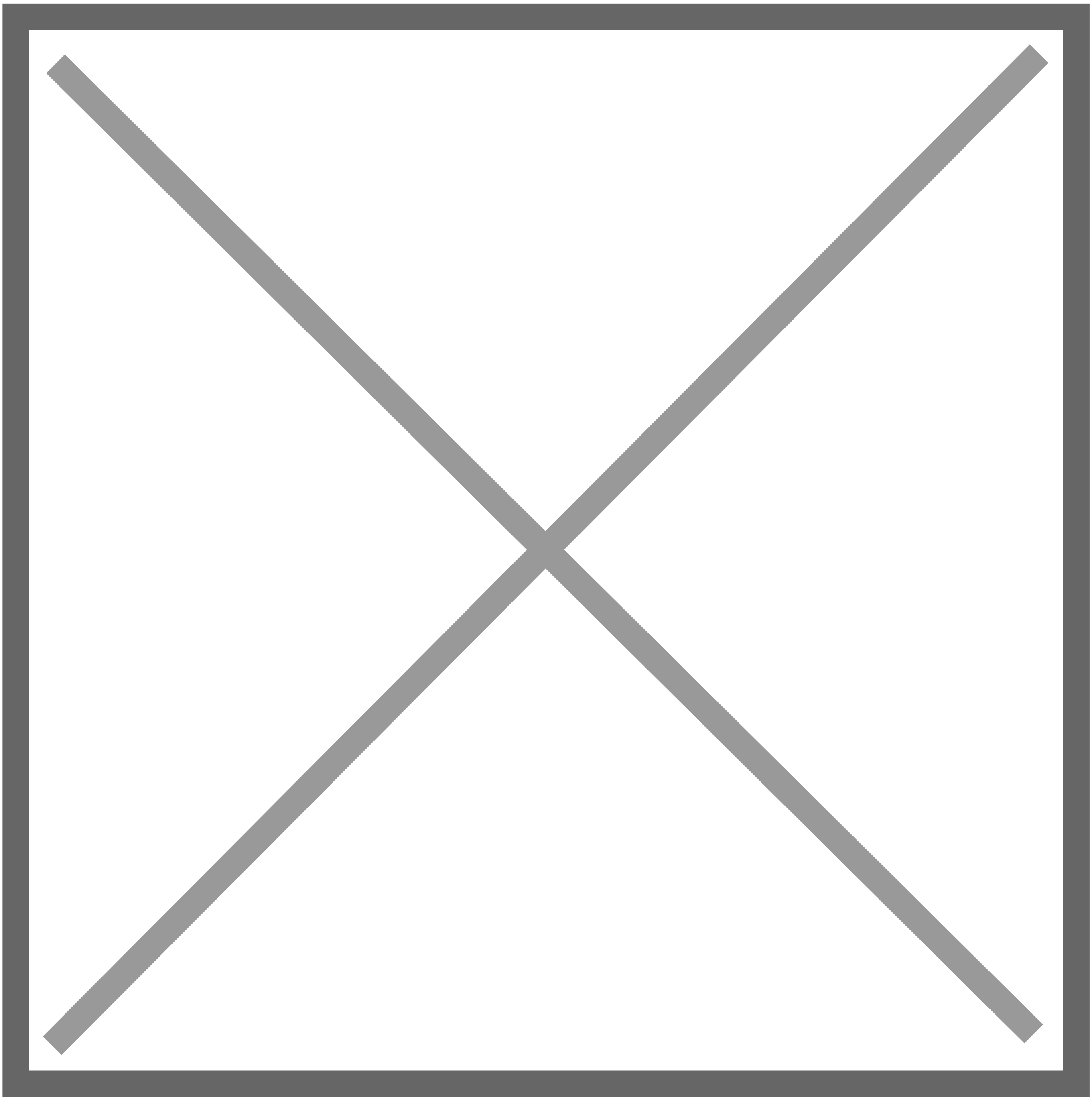
Invoices

Creating Invoice

Creating an Invoice record is very similar to creating a Quote record. You can create an Invoice by going to the Invoices module and clicking 'Create Invoice' from within the actions bar. The first panel allows you to specify details about the Invoice such as Status and Due Date.



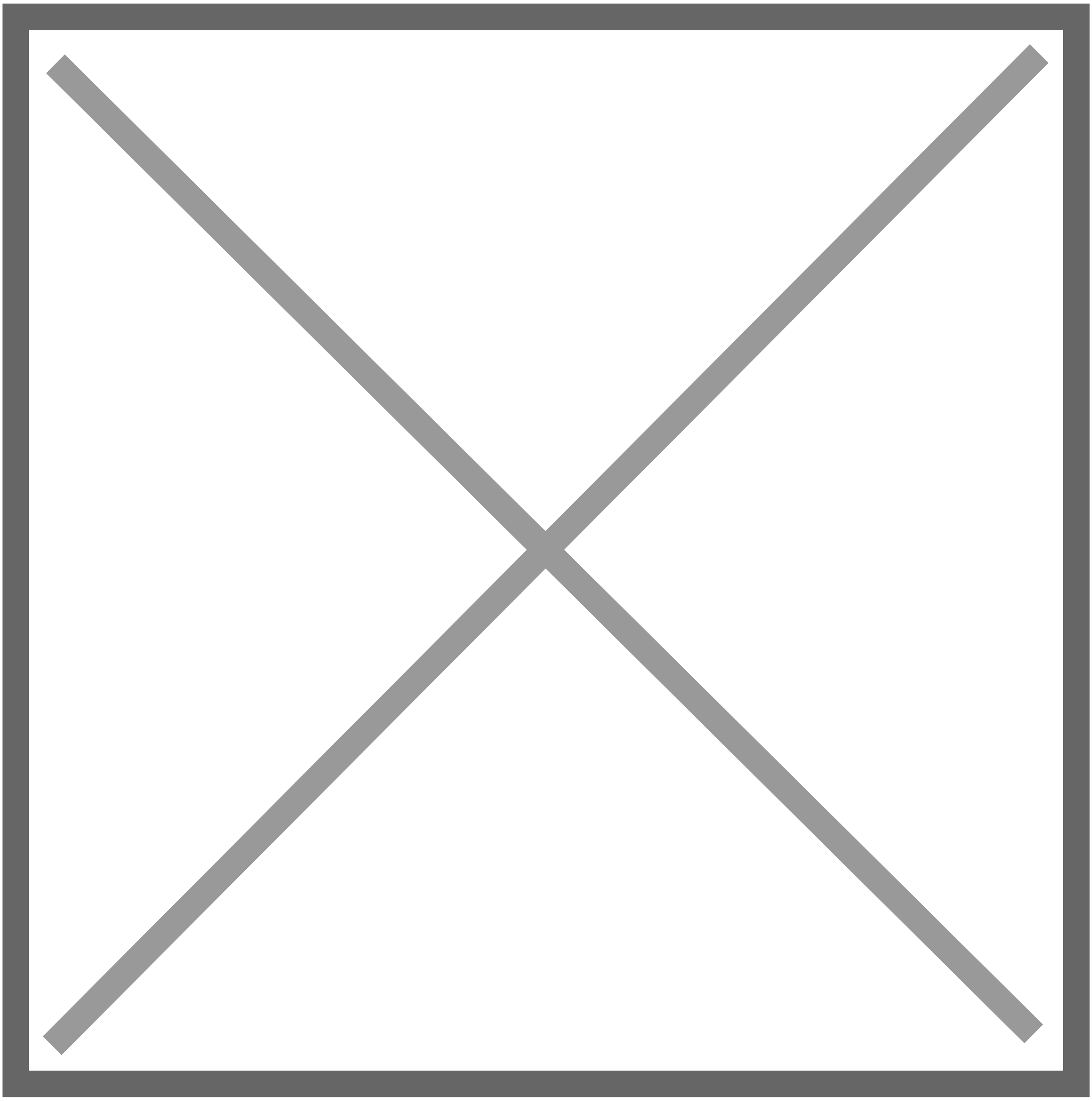
The second panel allows you to specify who the Invoice is for by relating a Company and Contact to the Invoice. When you select the Company, the Billing Address and Shipping Address are dynamically pulled from the Account and populated into the fields on the Invoice record.

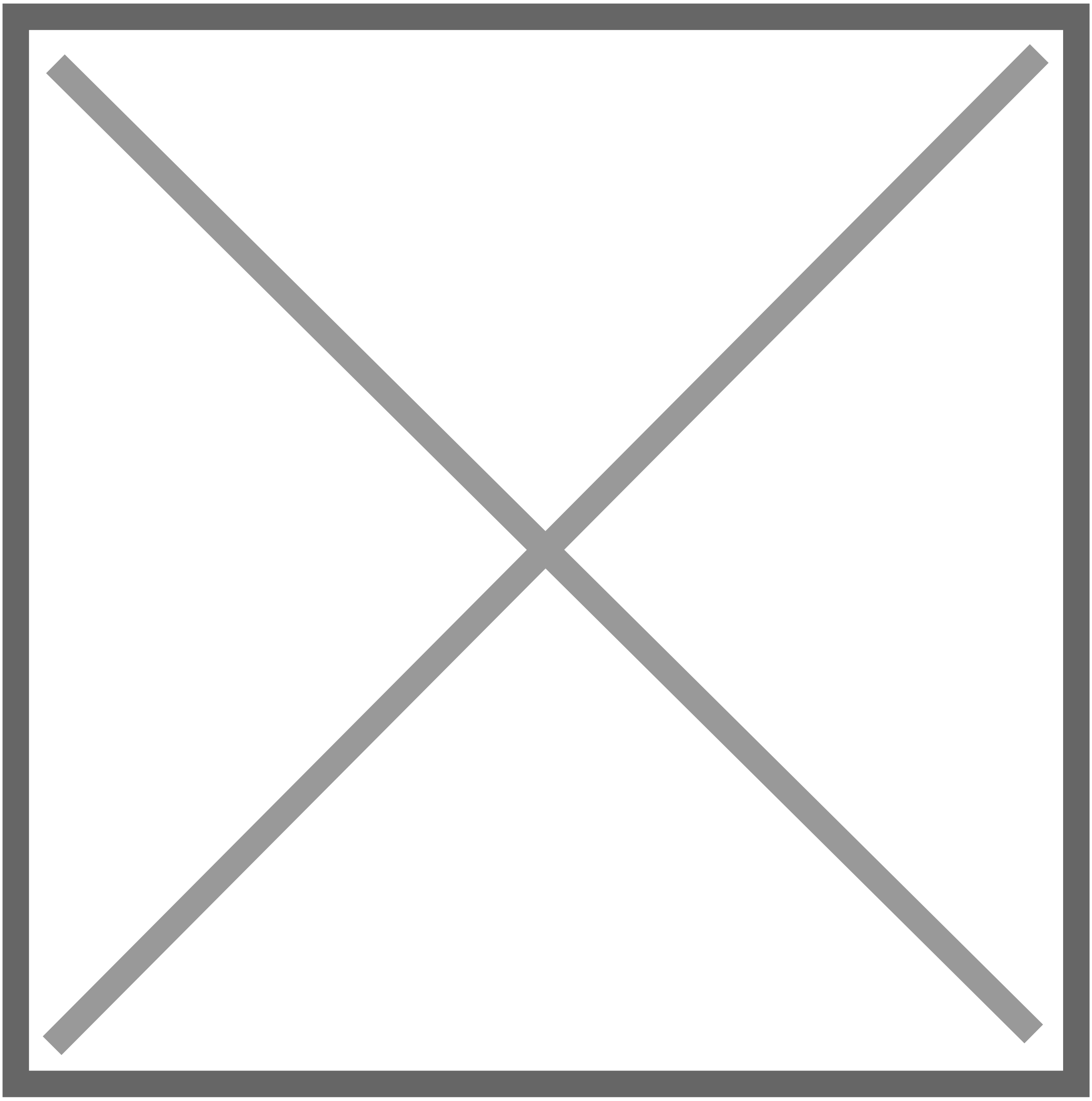


The third panel allows users to specify Line Items and the Currency. A Line Item can be a Product Line or a Service Line, each with its own details such as quantity, price, and description. The panel helps organize and calculate the total amount for the quote.

To add a Product Line, click on Add Product Line button and to add Service line click on Add Service Line button.

To select a Product, you can start typing in the Product or Part Number field which will provide a list of results similar to any related field. Alternatively click the arrow button next to the Part Number field. This will display a pop-up window allowing you to select from a list of Products.

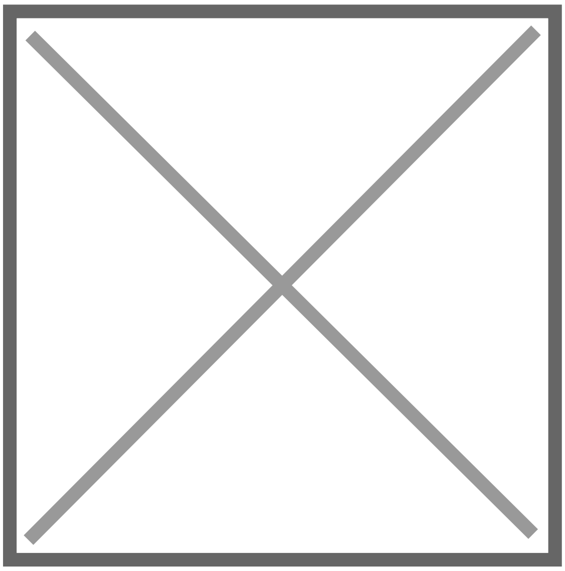




Once you have selected a Product, the List, Sale Price and Total will populate automatically. You can change the Quality, add Discounts (Percentage or Amount) and increase the Tax percentage. These will alter the Sale Price, Total Price and Total fields.

Sending Invoices / Detail View Actions

To output an Invoice you can select one of the following three buttons from the Invoice Detail View.



AOS provides users with three methods of sending Invoices:

- **Print as PDF** – Allows users to select a template and download or save a PDF of the Invoice.
- **Email PDF** – Allows users to select a template then directs you to the KiyoCRM email client 'Compose' screen. The Invoice PDF will be attached to email and the email will be addressed to the related Contact of the Invoice. This allows the user to fill out the email body.
- **Email Invoice** – This directs you to the KiyoCRM email client 'Compose' screen. The email will be addressed to the related Contact of the Invoice. There will be no attachment, and the Invoice will be displayed within the body of the email.
- **Edit, Duplicate, Delete, Find Duplicates, View Changelog** are similar to other modules (Refer leads detail view actions for reference)

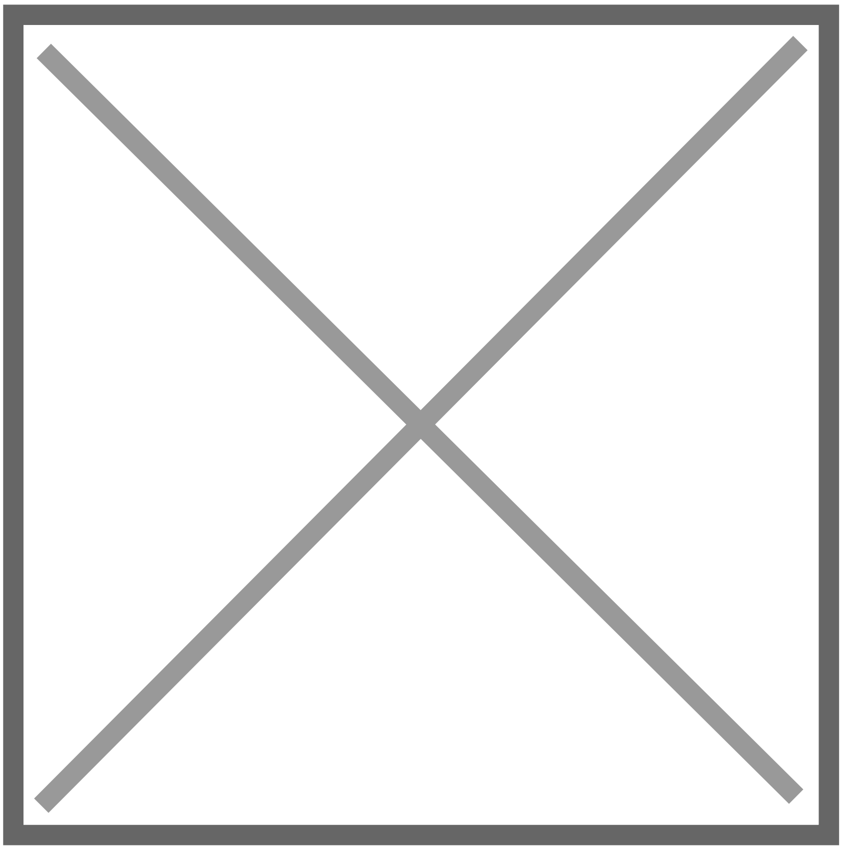
Bulk Actions

In list view, select group of records by checking the checkbox, the actions are as follows:

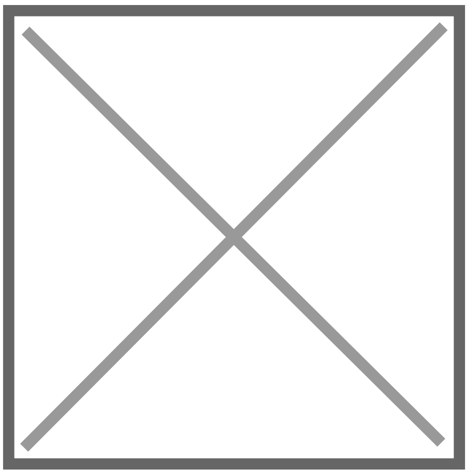
- **Mass Update**: Allows users to update multiple invoice records at once, saving time on repetitive changes.

- **Export:** Enables users to download invoice data in a structured format for reporting or offline use.

- **Delete**: Lets users remove one or more invoice records from the system as needed.

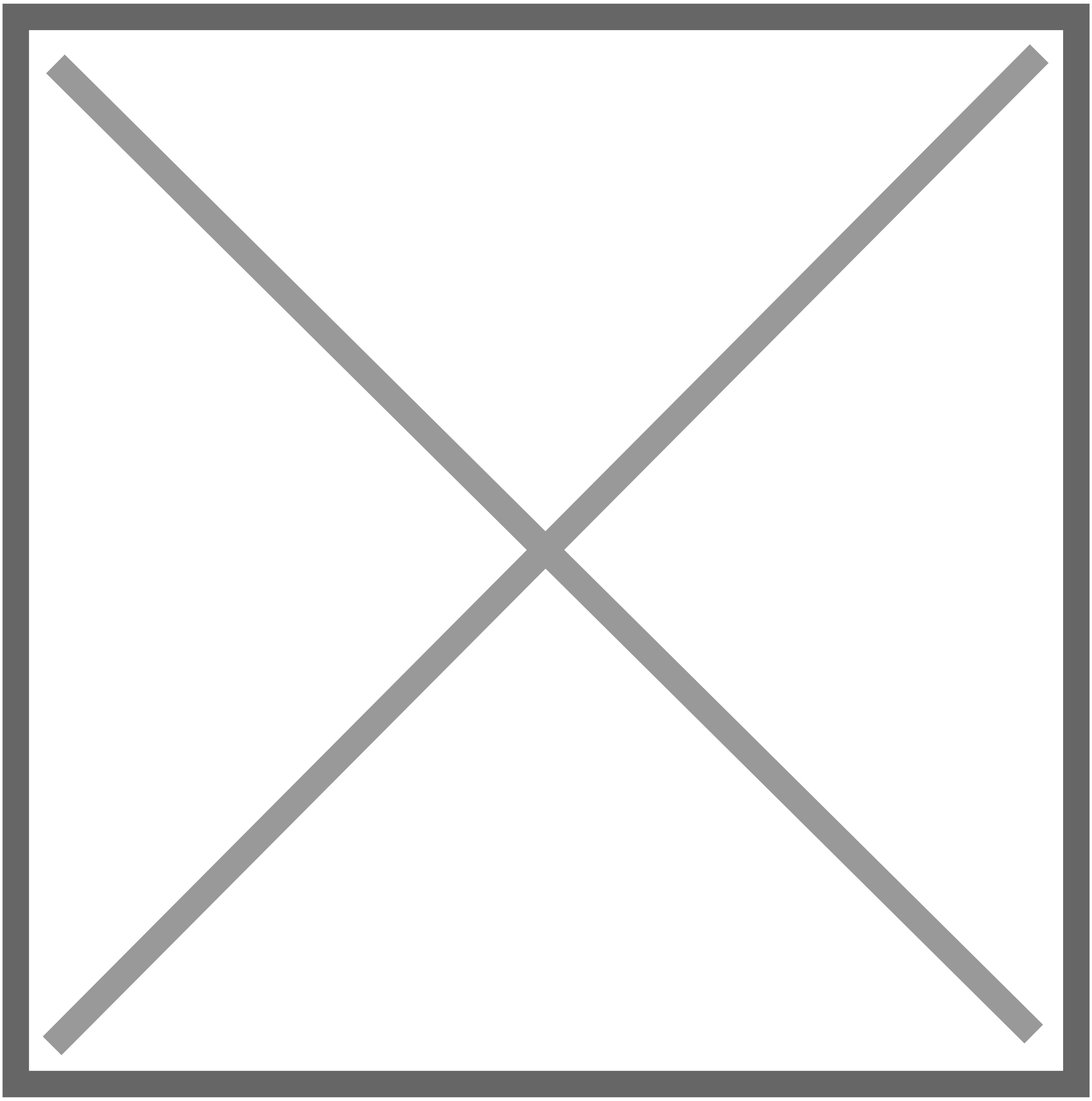


List View Page Actions



- **Import, Filter, Column Chooser functionalities** are similar to other modules. (Refer Leads module Actions)

- **Import Line Items:**-- Import Line Items feature in Quotes allows users to quickly add multiple products to a quote by uploading them from a file, streamlining the quote creation process.
- Download sample file using **Download Import File Template**. Add data and upload file (.csv)



- To sort records on the Invoices List View, click any column title which is sortable. This will sort the column either ascending or descending.
- To search for a Invoice, Use Search engine on top
- Clicking on the pencil icon Invoices list view page to the display of record edit view.

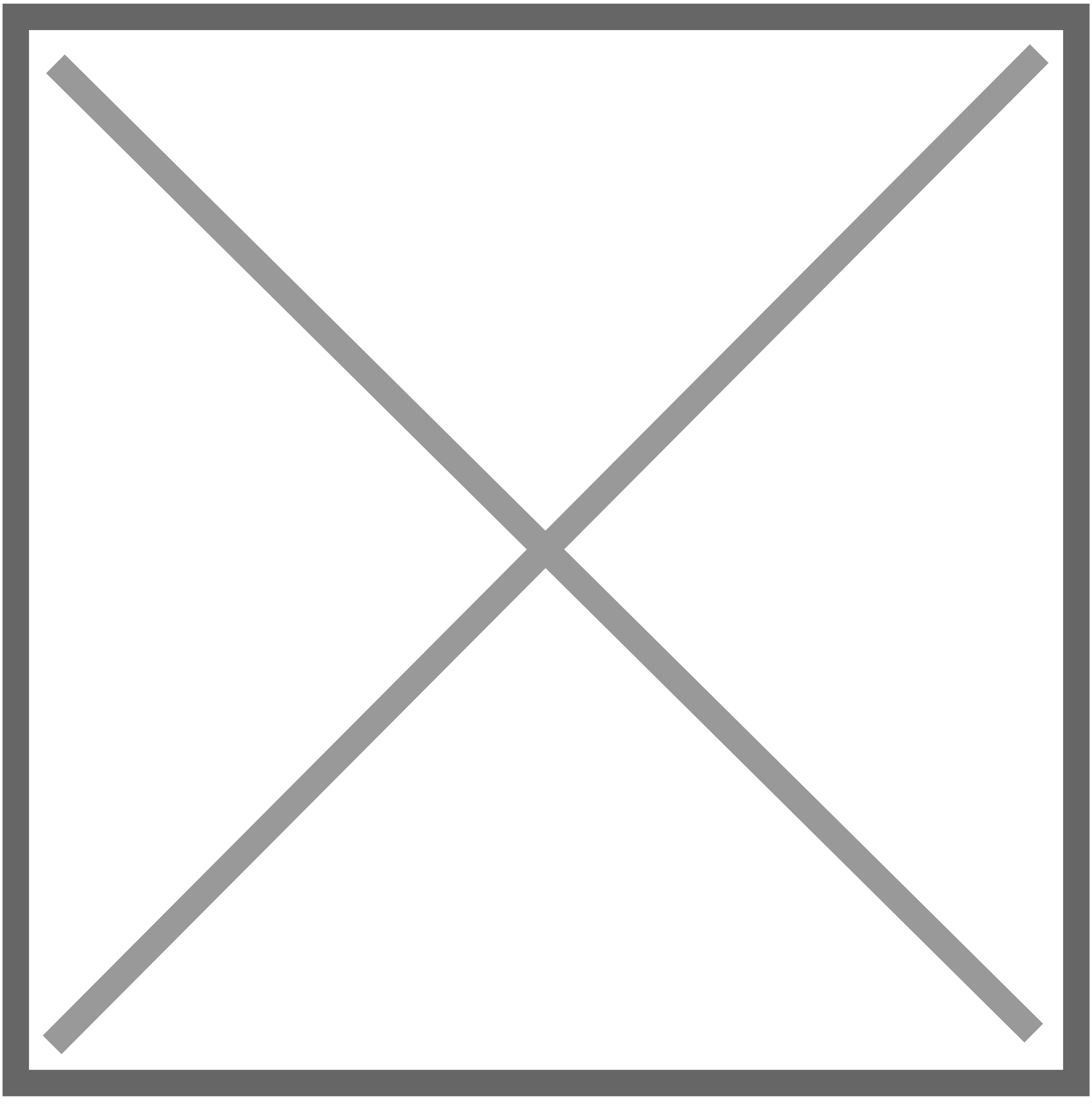
Invoice Submodules

Click on the detailed view of an Invoice to view Submodules.

Quotes

The Quotes submodule under Invoices links each invoice to its original quote, ensuring accurate billing based on agreed items, pricing, and terms.

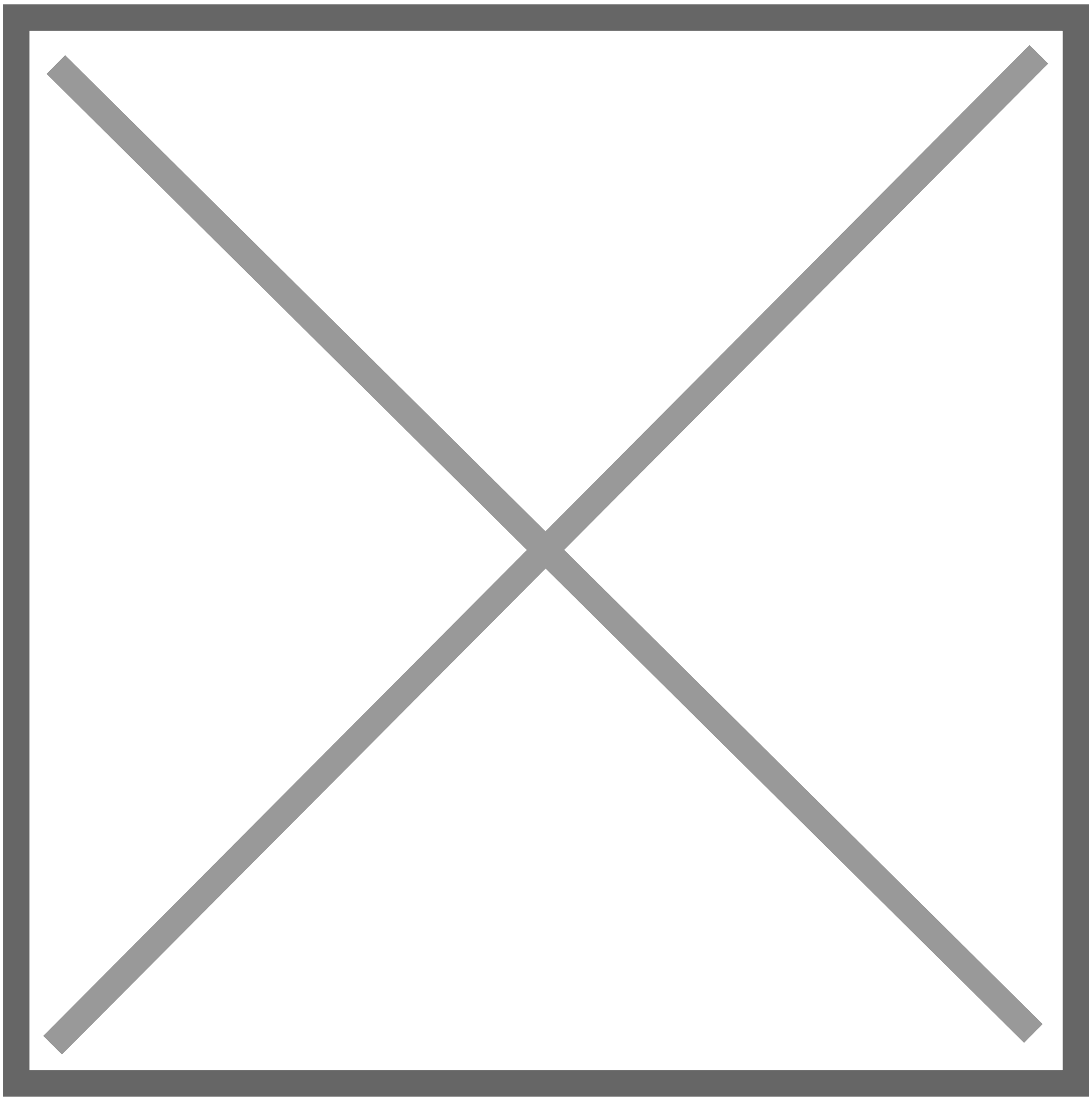
Can create a new or select from existing records.



Payments

The Payments submodule under Invoices manages and tracks payment details like amount, date, and method. In KiyoCRM, whenever an invoice is created or updated, a corresponding payment record is automatically generated or refreshed. A Razor pay payment link is sent to the customer via SMS. For every partial payment, the system creates a new payment record for the remaining amount and sends an updated Razor pay link to the customer, ensuring accurate tracking until full payment is received.

Can create a new or select from existing records.

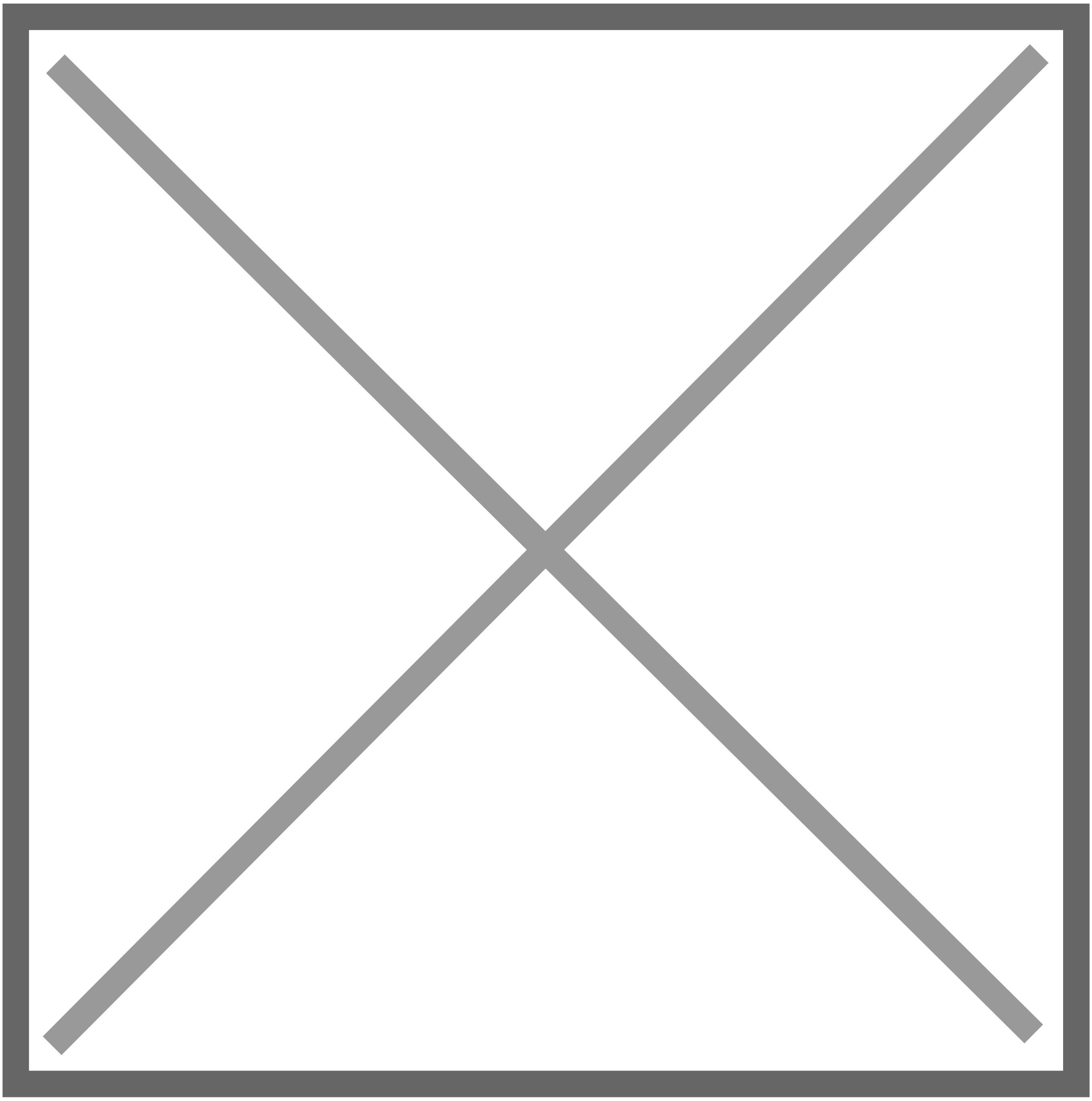


Contracts

AOS allows users to create Contracts using the Contracts module.

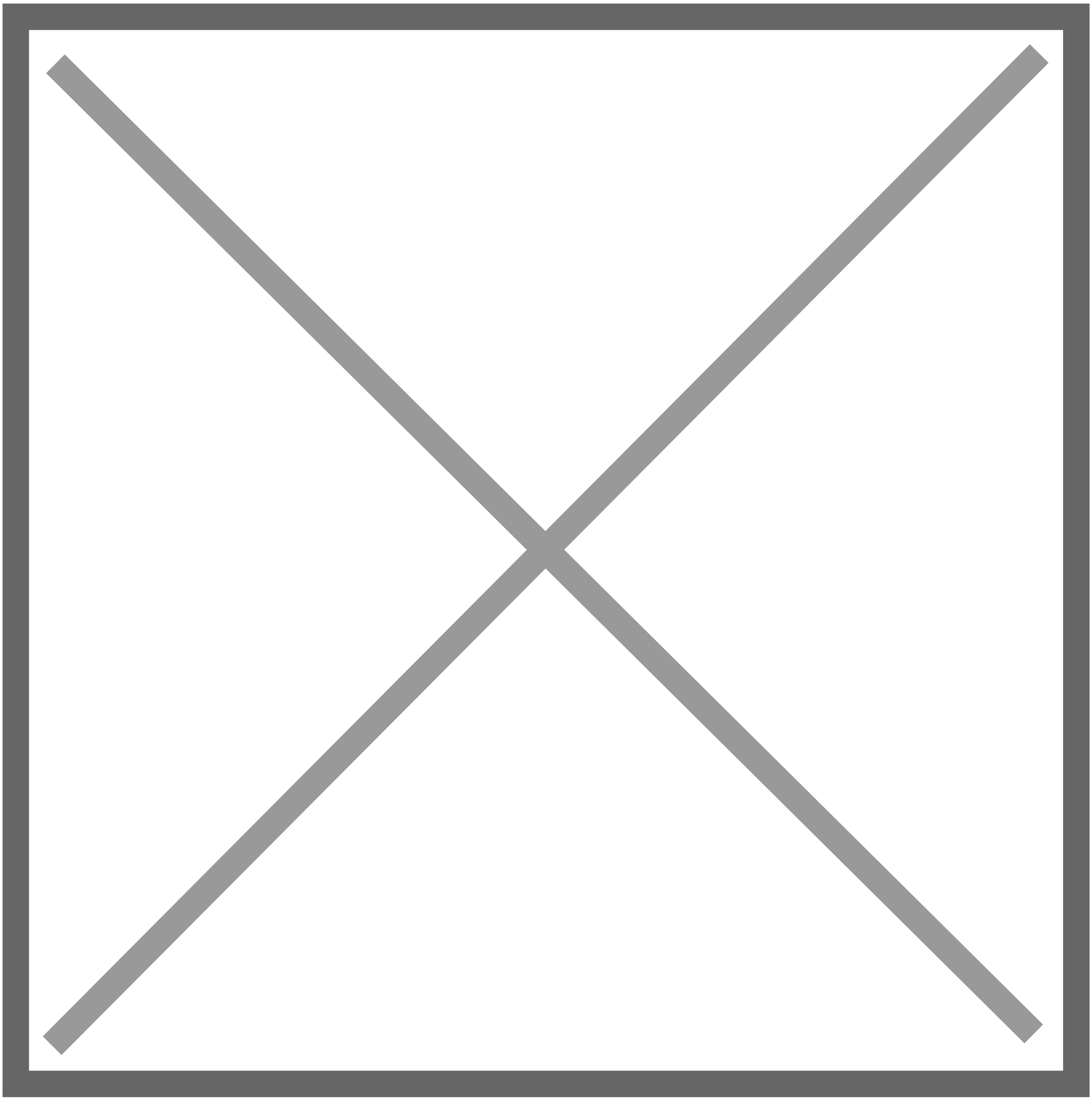
When the Contract is created the Renewal Reminder Date will populate automatically based on the amount of days specified in the AOS Settings in Admin. A Call will be scheduled and assigned to the

Contract Manager for this date.



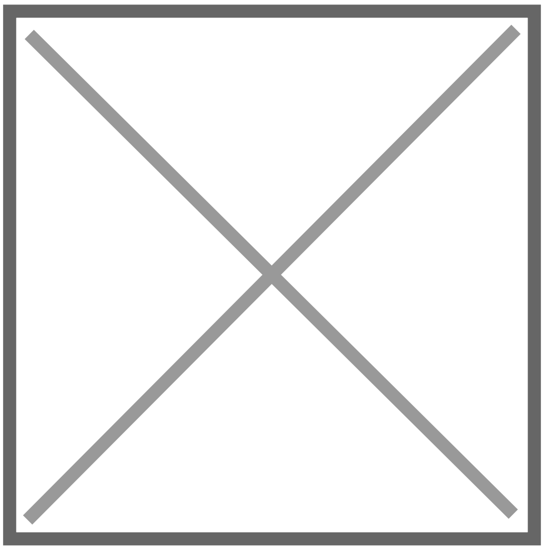
AOS allows users to add Line Items for Contracts. This is completed in the same way as Quotes. Please refer to the Quotes section for details on how to create Line Items.

The Second panel shows the Line items section.



Contracts List View Actions

Import, Column Chooser, Filter, My Filters, Favorites are Similar to other modules actions. Refer Leads module.



- To sort records on the Contracts List View, click any column title which is sortable. This will sort the column either ascending or descending.
- To search for a Contracts, Use Search engine on top
- Clicking on the pencil icon Contracts list view page to the display of record edit view.

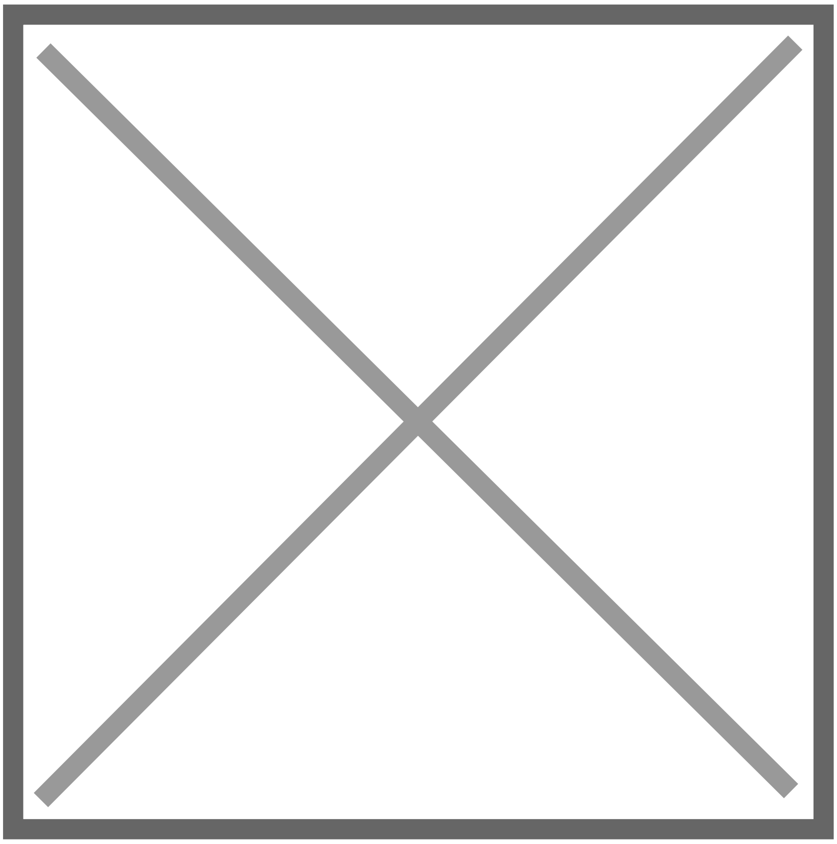
Bulk Actions

In list view, select group of records by checking the checkbox, the actions are as follows:

- **Mass Update**: Allows users to update multiple invoice records at once, saving time on repetitive changes.

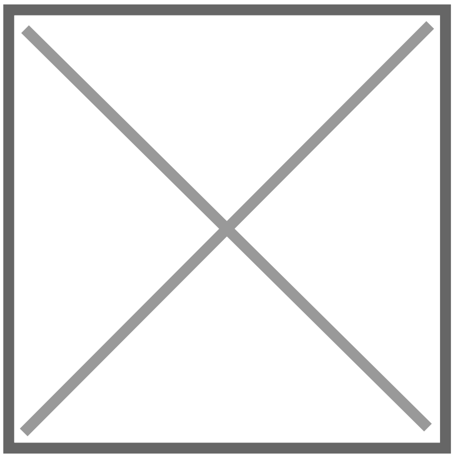
- **Export**: Enables users to download invoice data in a structured format for reporting or offline use.

- **Delete**: Lets users remove one or more invoice records from the system as needed.



Detail View Actions

Refer Quotes module for Edit, Duplicate, Delete, Find Duplicates, Print as PDF, Email PDF, View Changelog Log functionalities similar to quotes.



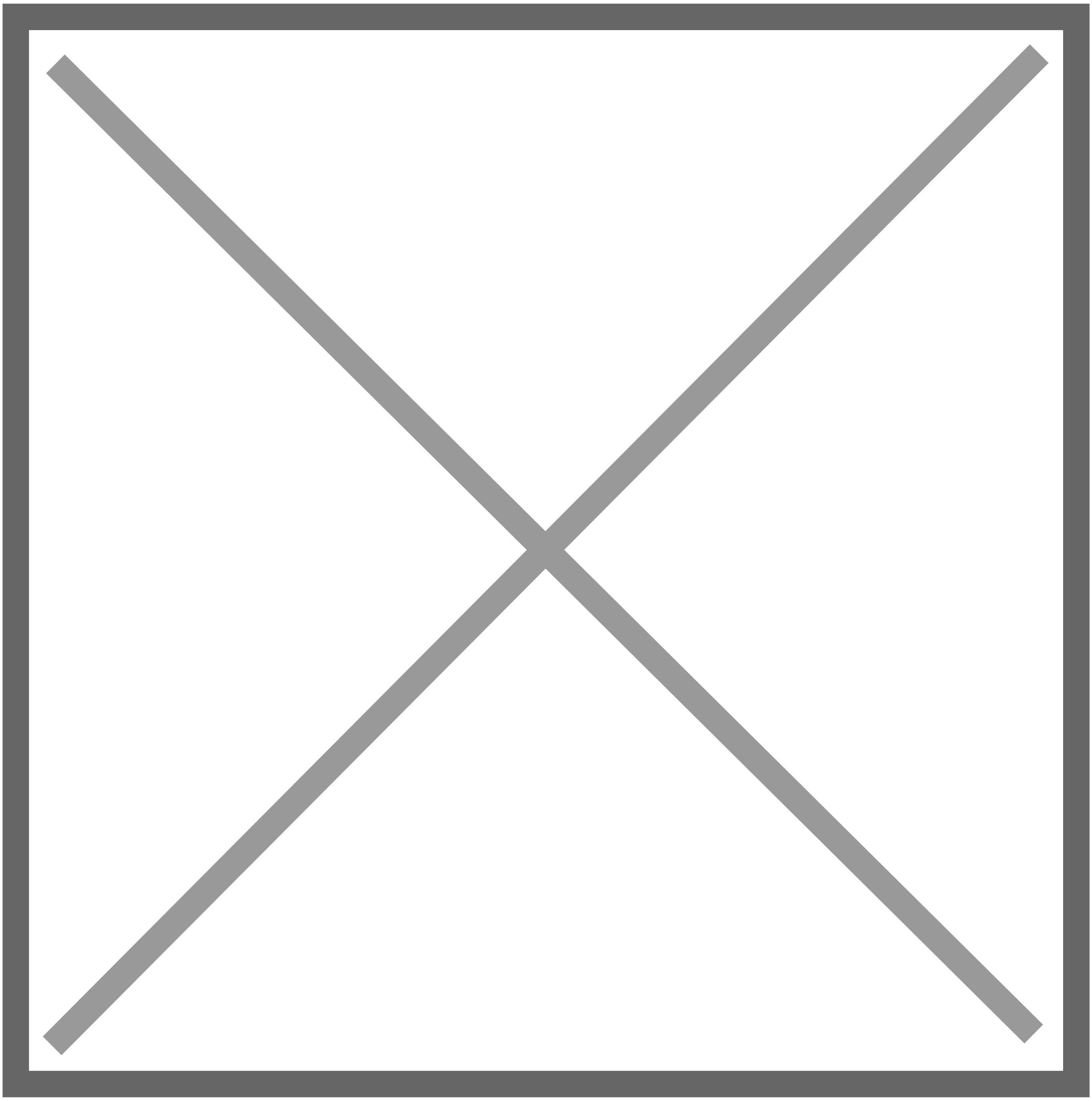
Contracts Submodules

Click on the detailed view of a Contract to view Submodules.

Documents

Allows users to upload, manage, and associate relevant documents with contract records for easy reference and compliance.

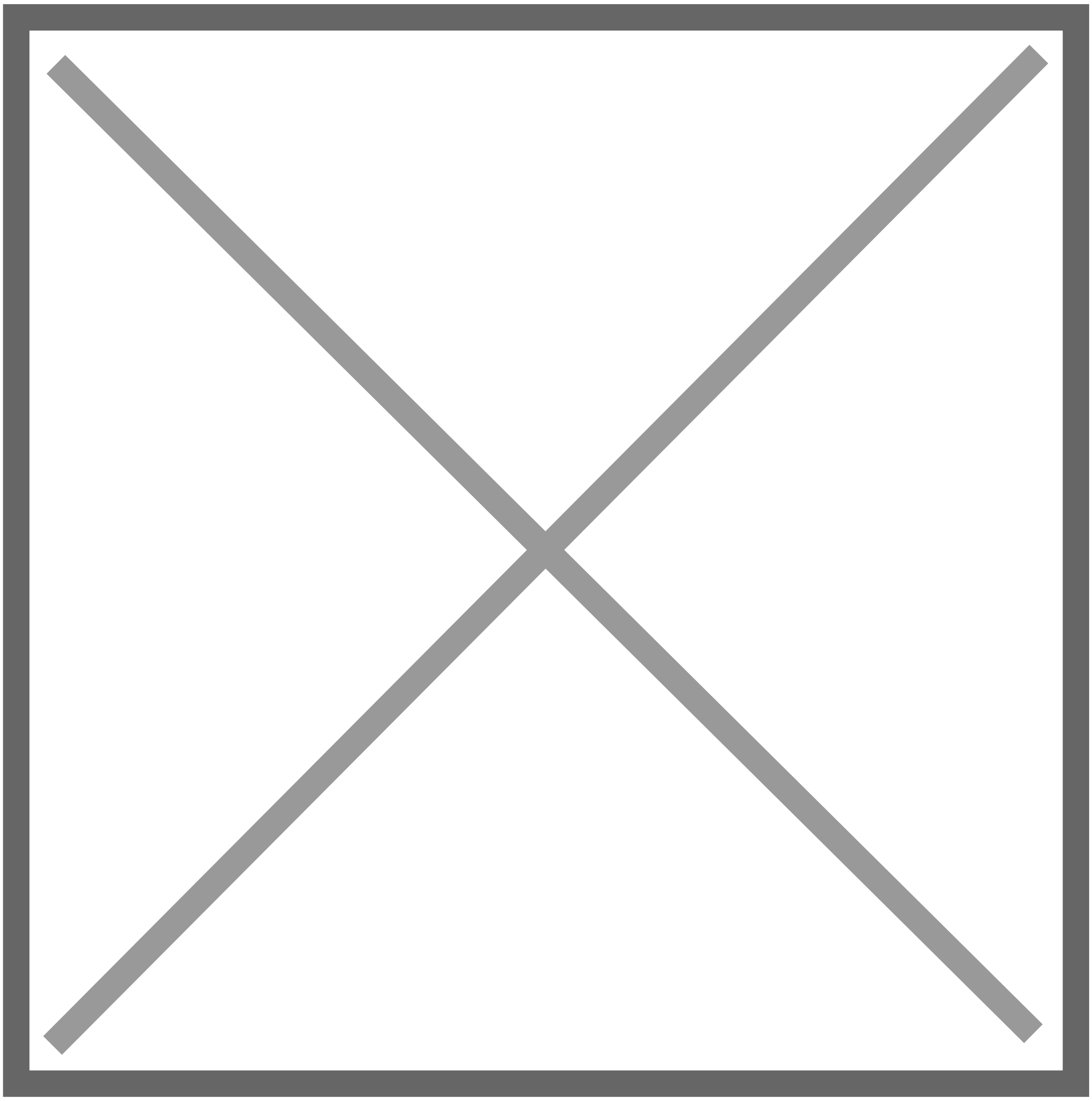
Can create a new one or select from existing records.



Quotes

Enables users to create, manage, and link sales quotes to contracts, supporting pricing, product details, and customer terms for streamlined contract generation.

Can create a new one or select from existing records.



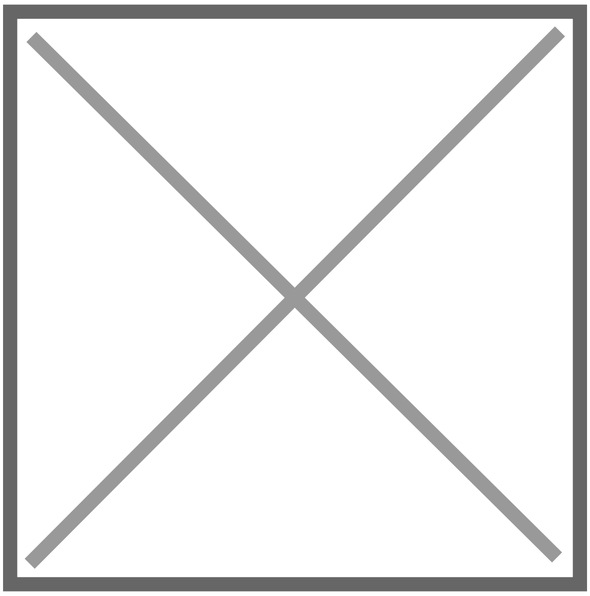
Payments

The Payments module in CRM enables users to record, track, and manage customer payment transactions efficiently. It links payments to related invoices, contracts, and customer records, ensuring transparency and accuracy in financial tracking. The module supports multiple payment methods, partial or full payments, and provides a clear overview of outstanding balances and payment history based on Invoice. This helps sales and finance teams monitor cash flow, follow up on overdue payments, and maintain strong customer relationships through timely financial interactions.

List View Page Actions

- **View Payments**: Displays a list of all recorded payments with details like amount, status, payment method, and linked invoices for easy tracking and management.

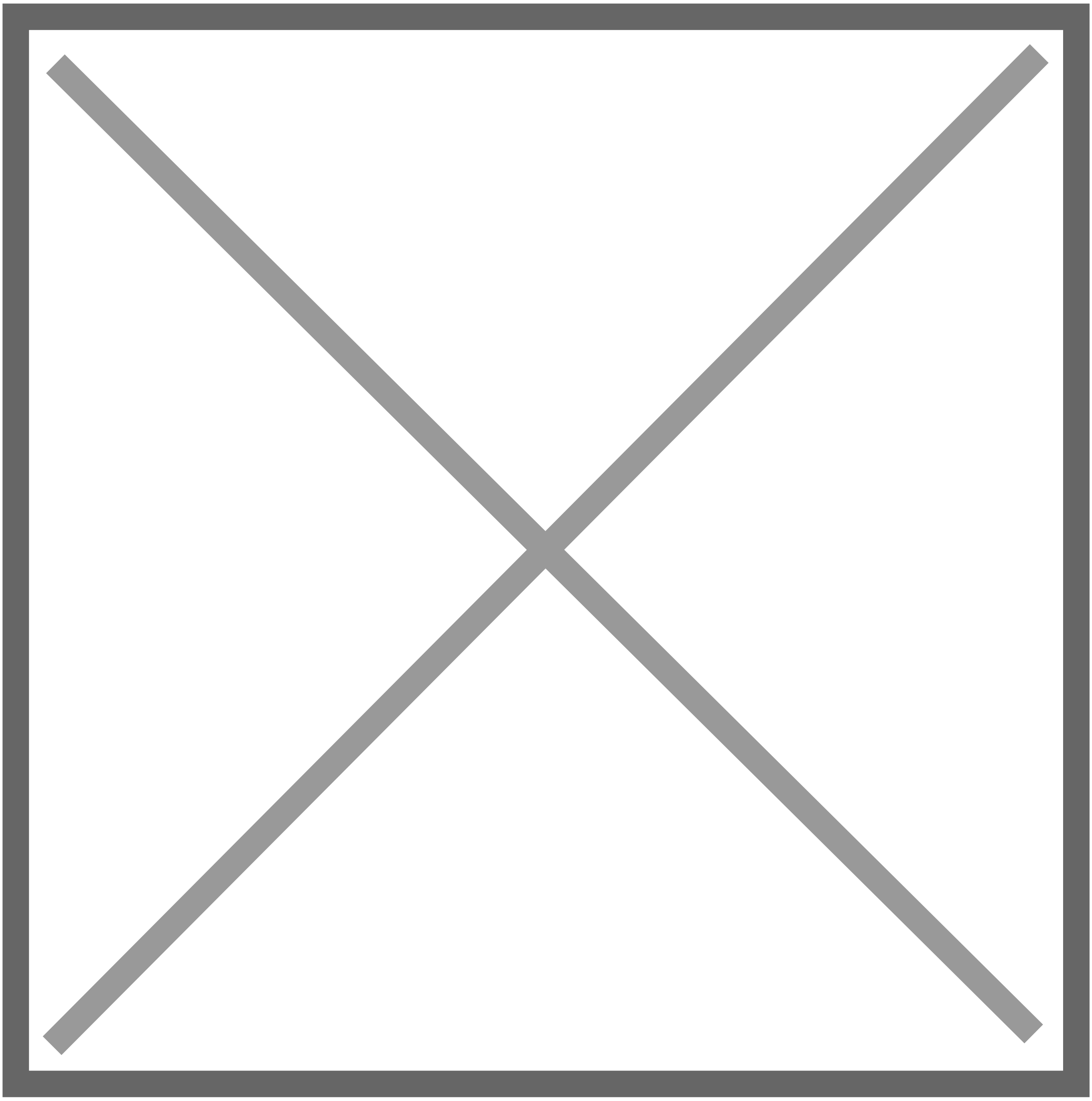
- **Import Payments**: Allows users to bulk upload payment records using a CSV file, streamlining data entry and ensuring efficient payment tracking.
- **Filters, Column Chooser, Favorites functionalities** similar to other modules. Refer Leads module.
- To sort records on the Payments List View, click any column title which is sortable. This will sort the column either ascending or descending.
- To search for a Payment, Use Search engine on top
- Clicking on the pencil icon Payments list view page to the display of record edit view.



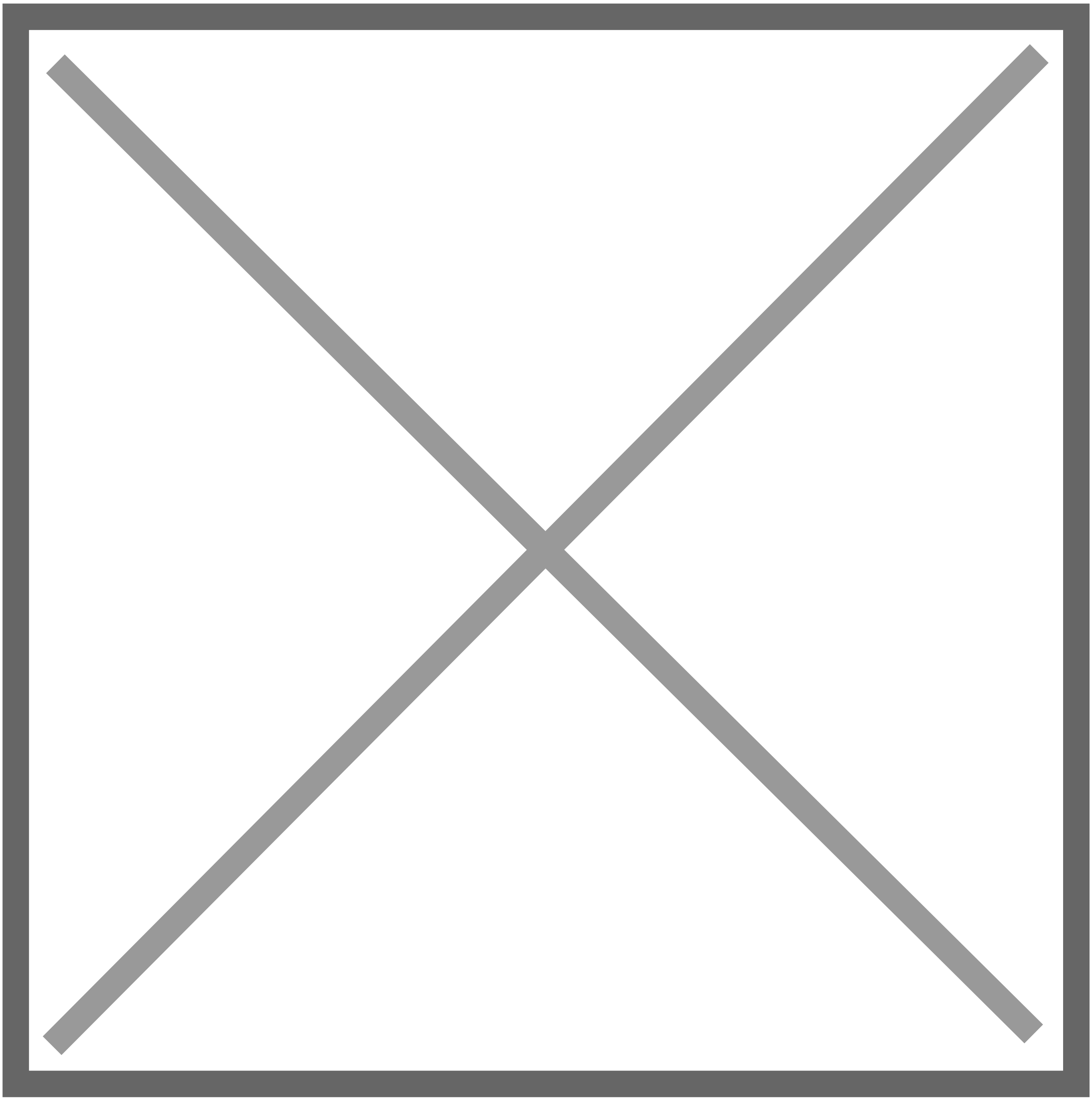
Creating Payments

When Invoice is created, a payment record is generated initially and later updated manually. Initial payment record will be created, later on need to update manually.

Note: Name filed will generate automatically or we can mention manually.



Enables users to record and manage customer payments, link them to invoices, and track status, amount, and method for accurate financial reporting.

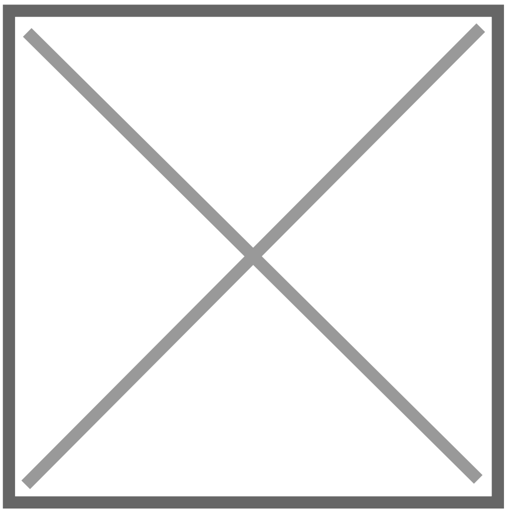


When Razor pay is selected as the payment gateway, the Razor pay details panel is enabled. Upon saving, a Razorpay payment link is automatically sent to the contact associated with the linked invoice.

If customer paid through the link and response will be updated in payment as well as in Invoice record.

Detail View Actions

- **Edit, Duplicate, Delete, Find Duplicates, View Changelog** functionalities are similar to other modules. Refer Leads module Detail view actions.

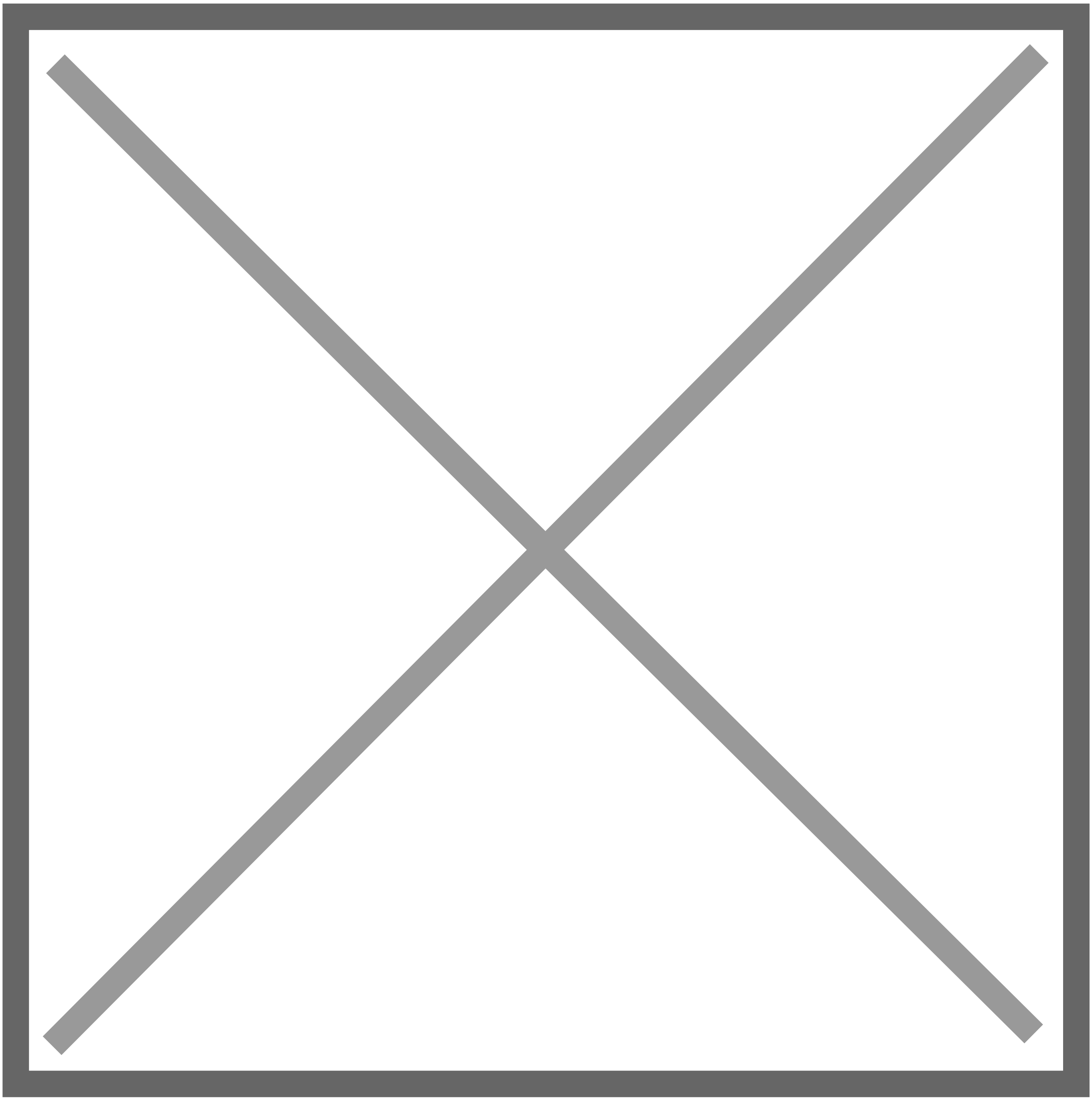


Payments Submodules

Click on the detailed view of a Contract to view Submodules

Security groups

Control access to payment records by assigning user roles and permissions, ensuring data security and proper authorization.



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