

Victory Vista CRM

End User Guide

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1. Introduction

Victory Vista CRM is a robust Customer Relationship Management (CRM) application designed to streamline your business processes and enhance customer interactions. Developed with an intuitive interface and powerful automation capabilities, Victory Vista CRM provides comprehensive management of your sales pipeline, from lead generation to order fulfilment and invoice generation.

Key Features

1. **Lead Conversion:** Simplify your sales process with the “Convert Lead” button, which automatically converts custom leads into Account and Contact records with a single click.
2. **Quote Generation:** Create quotes effortlessly with the “Create Quote” button on the Account record page. This feature populates a new quote with all necessary field data from the Account.
3. **Quote Line-Item Management:** Utilise the Lightning Web Component (LWC) on the Quote detail record tab to manage quote line items. Select products, adjust quantities, apply discounts, and see real-time calculations of net totals and sales prices in a repeater component.

* Product	* Description	* List Price	* Quantity (Min: 1)	* Discount % (Min: 0%)	* Sales Price	* Net Total
Silk Carpet	SC100 Black	500	10	20	400	4,000
Woolen Carpet	WC100 White	100	5	12	88	440
Velvet Carpet	VC100 Red	200	50	25	150	7,500

4. **PDF Generation:** Generate professional quote proposals and order summaries with the click of a button. PDFs are automatically attached to the relevant records, making them easily accessible for future reference.
5. **Order Creation and Management:** Seamlessly convert quotes into orders using the “Create Order” button. The app also offers the same LWC functionality on the Order detail record tab, enabling synchronised management of line items across quotes and orders.

Order O-0001

Generate PDF Edit Delete

Related Details **Add Order Lines** Files Generate Invoice Invoices

* Product	* Description	* List Price	* Quantity (Min: 1)	* Discount % (Min: 0%)	* Sales Price	* Net Total
Silk Carpet	SC100 Black	500	10	5	475	4,750
Woolen Carpet	WC100 White	100	20	12	88	1,760
Velvet Carpet	VC100 Red	200	50	25	150	7,500

Add More Save Order Lines

6. **Invoice Management:** Manage invoices through two specialised LWCs on the Order record. One LWC displays order line items in a data table for easy invoice creation, while the other presents all invoices in an accordion view with quick access to individual records and PDF generation.

Order O-0001

Generate PDF Edit Delete

Related Details Add Order Lines Files **Generate Invoice** Invoices

	Product Name	Quantity	Available Quantity	Invoiced Quantity	Ordered Quantity	Sales Price	Discount %
1	Silk Carpet	0	5	5	10	500	5
2	Woolen Carpet	0	12	8	20	100	12
3	Velvet Carpet	0	38	12	50	200	25

Cancel Save

Order O-0001

Generate PDF Edit Delete

Related Details Add Order Lines Files Generate Invoice **Invoices**

Invoice No	Status	Due Date	Invoice Amount	GST Amount	Total Amount
INV-00003	Generated	2024-08-20	₹1939	₹0	₹1939
Product	Description	Quantity	Discount %	Sales Price	Net Total
Silk Carpet	SC100 Black	1	5%	₹500	₹475
Woolen Carpet	WC100 White	3	12%	₹100	₹264
Velvet Carpet	VC100 Red	8	25%	₹200	₹1200
INV-00004	Generated	2024-08-20	₹1800	₹0	₹1800
INV-00002	Generated	2024-08-20	₹4879	₹0	₹4879

Objects Managed

Victory Vista CRM manages a wide range of custom objects:

- **Lead**
- **Account**
- **Contact**
- **Quote**
- **Quote Line Item**
- **Order**
- **Order Line Item**
- **Invoice**
- **Invoice Line Item**
- **PriceBook**
- **Price Entry**
- **Product**
- **Product Inventory**
- **Payment Link**
- **Payment Received**

Availability

Victory Vista CRM is available as a managed package and can be downloaded and used for free by anyone on Salesforce AppExchange. This app offers a comprehensive solution for managing the entire sales process in one centralised platform, enhancing efficiency and productivity.

2. Configuration

Before installing Victory Vista CRM, ensure that your Salesforce environment is configured as per the prerequisites listed below. This ensures optimal functionality and user experience.

2.1 Multi-Currency Support

Victory Vista CRM requires that multi-currency support is enabled in your Salesforce org. Multi-currency enables your organisation to handle transactions in multiple currencies, which is essential for accurate financial reporting and customer invoicing.

2.2 Custom Address Data Type

To utilise custom address fields within Victory Vista CRM, you need to enable the custom address data type in your Salesforce org. Follow these steps to enable custom address fields:

1. Go to **Setup** in Salesforce.
2. In the Quick Find box, enter **User Interface**, and select **User Interface**.
3. In the Setup section, check the box for **Use custom address fields**.
4. Click **Save** to apply the changes.

2.3 PDF Viewing in Salesforce Browser

For viewing generated PDFs directly within the Salesforce browser, follow these steps:

1. Go to **Setup** in Salesforce.
2. In the Quick Find box, enter **File Upload and Download Security**.
3. Click on the **Edit** button.
4. Set the picklist to **Execute in Browser** for the **.pdf** file type.
5. Click **Save** to confirm the changes.

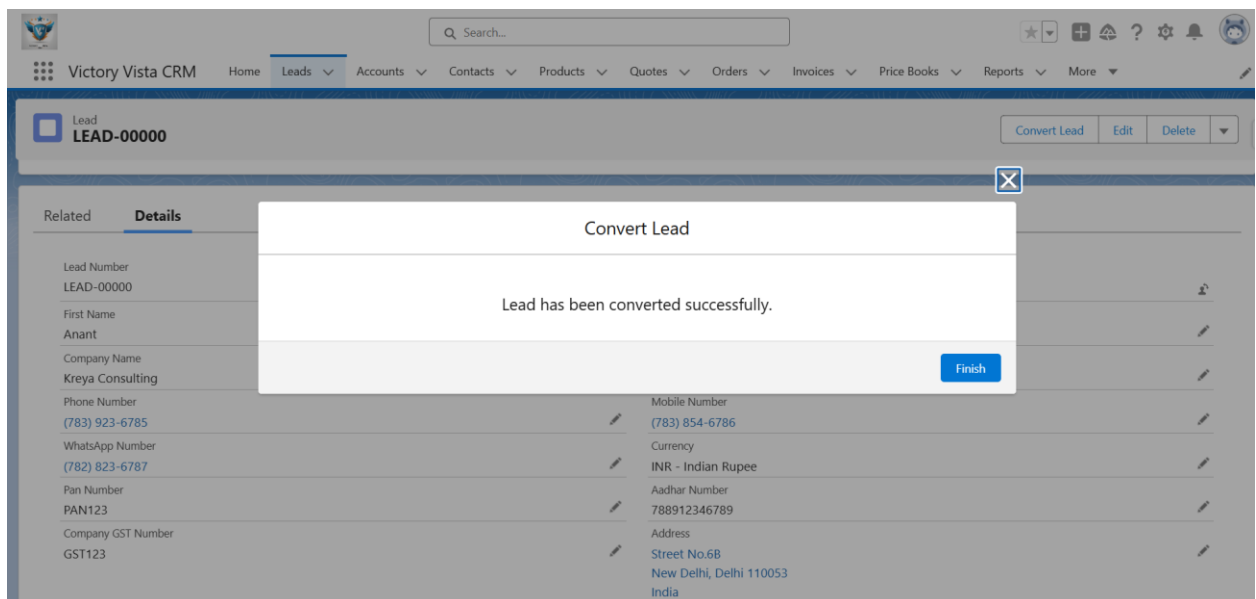
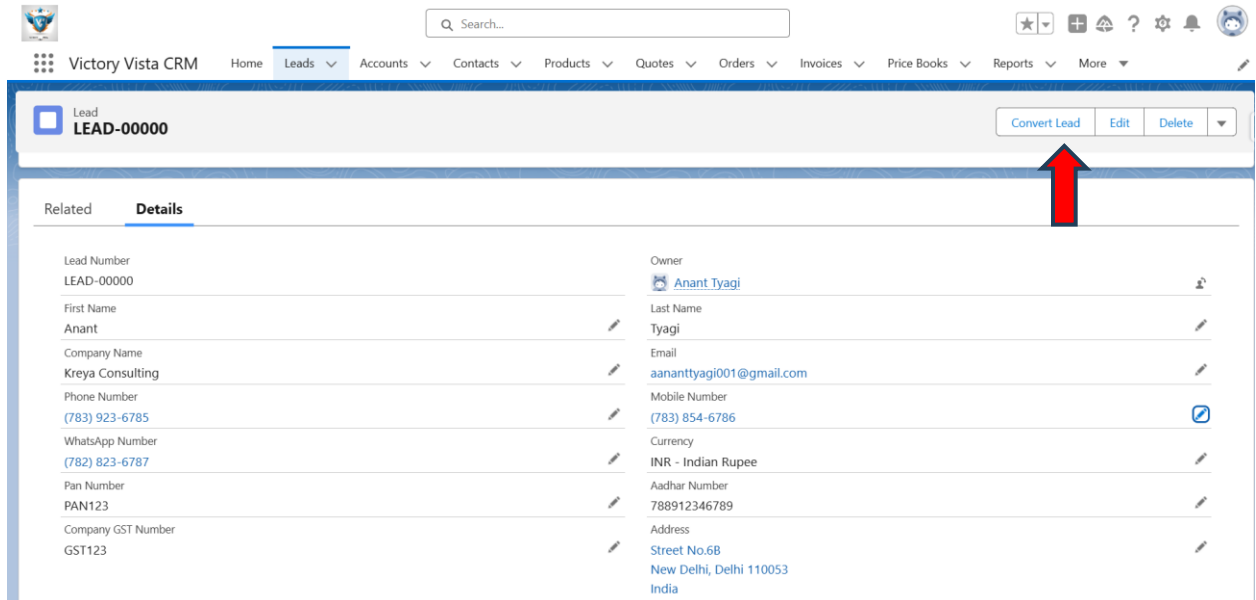
2.4 Additional Configuration After Installation

- After installing, Ensure that all users have the necessary permissions to access and modify the custom objects and fields used by Victory Vista CRM.
- Verify that all the buttons are configured on the page layout within your Salesforce environment such as:
 1. Convert Lead on Lead Object.
 2. Create Quote on Account Object.
 3. Create Order and Generate PDF on Quote Object.
- Active **PriceBook Validation** Flow.
- In order to show your company's information such as Organisation Logo, Organisation Name, Organisation Email, Organisation Contact Number, Organisation Address in the PDF follow the following steps:
 1. Go to Setup and search for Custom Metadata Types.
 2. In the Metadata Types, Click on 'Vista CRM PDF',
 3. Click on 'Manage Vista CRM PDFs' and Click 'New'.
 4. Enter the label for the metadata, Organisation Name, Organisation Email, Organisation Contact Number, Organisation Address.
 5. And for the Organisation Logo, enter the link of the logo image in the Organization_Logo. For the link of the logo image, switch to the classic salesforce and go to the Documents.
 6. There will be an image called 'Logo' in the document tab. Open that Logo file.
 7. Click on the Replace Document button, and replace the existing logo with your own Organisation Logo and save it.
 8. After saving, open your uploaded document image in the new tab and copy the URL in the metadata type.

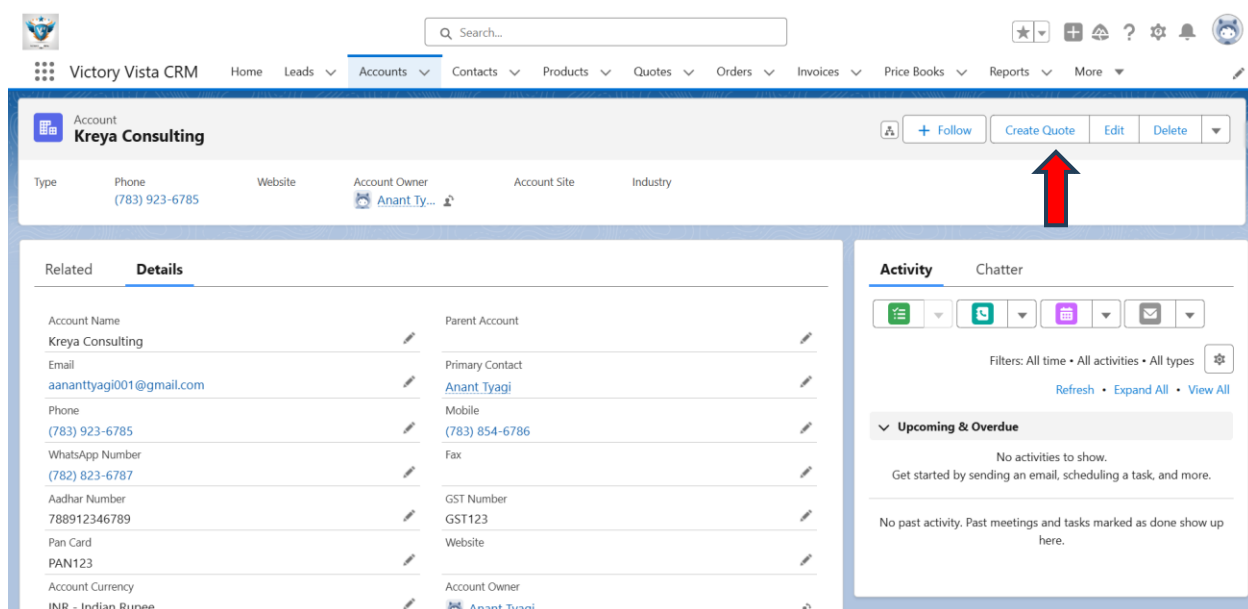
Note: You can use the URL of the existing document image as well in the metadata.

3. Use Case

- A. Open the Victory Vista CRM app.
- B. Create a Lead record.
- C. Open the Lead record and click on Convert Lead button to create Account and Contact.



- D. Open the newly created Account record and click on 'Create Quote' button.



- E. Open the newly created Quote record. Price Book Id will fetch automatically based on the Currency on the quote record. There can be only one active price book for each currency.
- F. Sales Rep name will be automatically fetched based on the Logged in User who created the Quote record.
- G. Click on the 'Add Quote Lines' tab on the quote record. And search for the product. The products will be shown based on the price book of the quote.

Quote Q-0000

Generate PDF Create Order Edit

Related Details Add Quote Lines Files Orders

Quote Number Q-0000	Owner Anant Tyagi
Customer Meta	Primary Contact TestRecord New Version
Status Draft	Quotation Expiry Date 11/09/2024
Sales Rep Anant Tyagi	IGST %
CGST % 9.00%	SGST % 6.00%
Price Book INR Price Book	Currency INR - Indian Rupee
Quote Total Amount 3,010.00	GST Amount 451.50
Total GST Amount 3,461.50	Order Q-0000
Billing Address X-185/6 Gali No.6B Brahampuri New Delhi 110053 Delhi	Shipping Address X-185/6 Gali No.6B Brahampuri New Delhi 110053 Delhi

- H. List price will be fetched automatically along with Product Description. Product Description, Quantity and Discount are editable.
- I. Enter the Quantity and Discount and the Sales Price and Net Total will be calculated automatically.
- J. If you want to add more products then click on 'Add More' button otherwise click on 'Save Quote Lines' button to create Quote Lines. You can also delete a quote line using delete icon.

Quote Q-0000

Generate PDF Create Order Edit

Related Details Add Quote Lines Files Orders

* Product	* Description	* List Price	* Quantity (Min: 1)	* Discount % (Min: 0%)	* Sales Price	* Net Total	
Silk Carpet	SC100 Black	500	5	0	500	2,500	
Velvet Carpet	VC100 Red Color	200	2	40	120	240	
Woolen Carpet	WC100 White	100	3	10	90	270	
Search Products...							

Add More Save Quote Lines

- K. To create a PDF file for the Quote proposal along with Quote Lines table, click on 'Generate PDF' button. You can see your PDF in the 'Files' tab.
- L. To create related Order and Order Lines click on 'Create Order'.

Quote Q-0002

Generate PDF Create Order Edit

Related Details Add Quote Lines Files Orders

Quote Number Q-0002

Customer Amazon

Status Draft

Sales Rep AnantTyagi

CGST %

Price Book

Quote Total Amount 3,940.00

Total GST Amount 4,334.00

Owner Anant Tyagi

Primary Contact Test Record-1

Quotation Expiry Date 9/7/2024

IGST % 10.00%

SGST %

Currency INR - Indian Rupee

GST Amount 394.00

Order O-0002

- M. Open the order record, you can see the order lines in the 'Add Order Lines' tab. They are synched with the quote lines. If you modify or delete from Order record then it will get reflected on the Quote and vice-versa.
- N. To create a PDF of Order and Order Line table, click on 'Generate PDF' button. You can see your PDF in the 'Files' tab.

Order O-0000

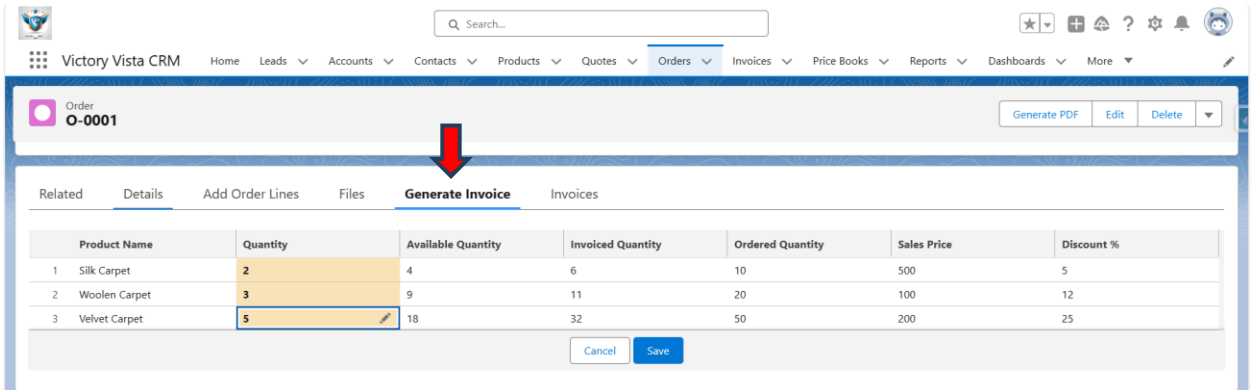
Generate PDF Edit Delete

Related Details Add Order Lines Files Generate Invoice Invoices

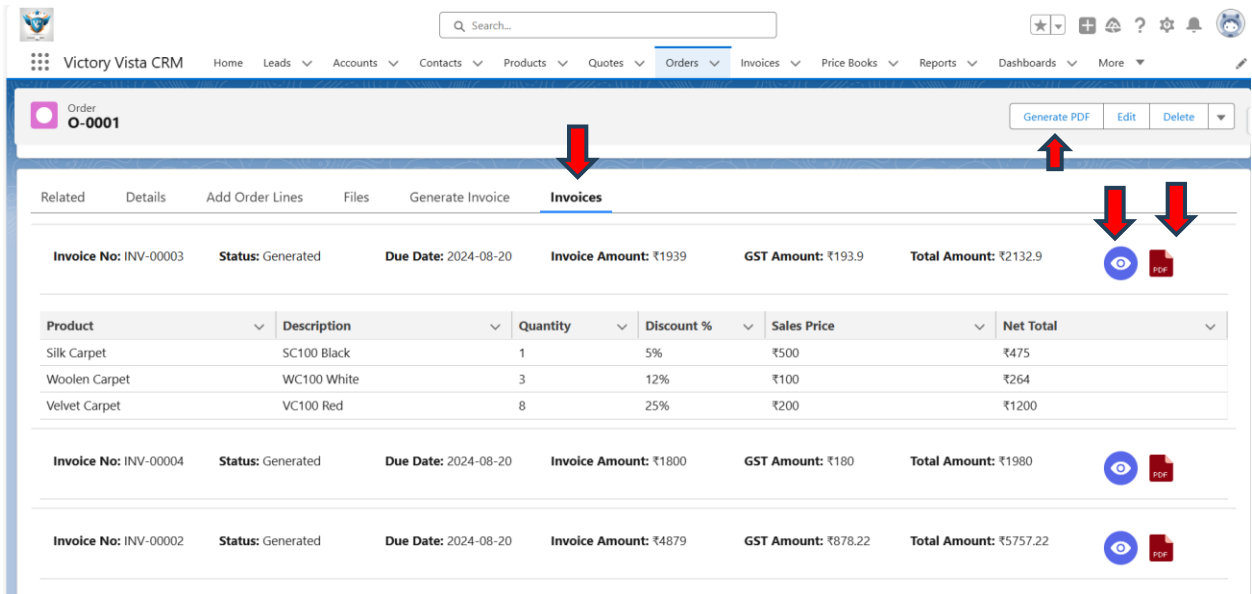
* Product	* Description	* List Price	* Quantity (Min: 1)	* Discount % (Min: 0%)	* Sales Price	* Net Total
Silk Carpet	SC100 Black	500	5	0	500	2,500
Velvet Carpet	VC100 Red Color	200	2	40	120	240
Woolen Carpet	WC100 White	100	3	10	90	270
Search Products...						

Add More Save Order Lines

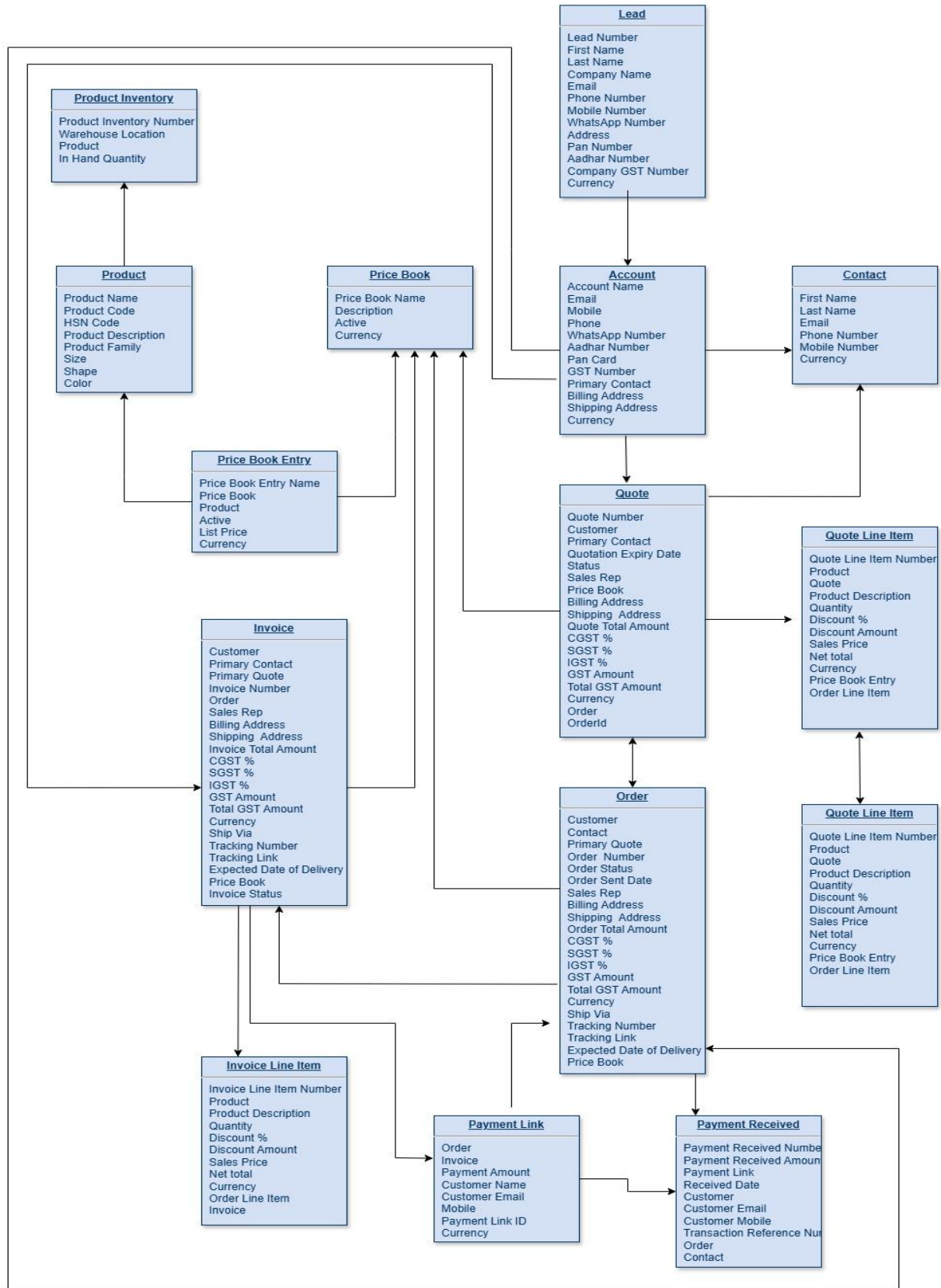
- O. In order to create Invoices, click on 'Generate Invoice' tab on the Order record.
- P. Enter the Quantity for the Invoice Line Item, and click on Save button to create Invoice along with its Invoice Line Items.



- Q. To view the details of Invoice and Invoice Line Items, Click on Invoices Tab of Order record.
- R. You can see the accordion of Invoices. Click on the accordion to expand the row to see the Invoice Line-Item table.
- S. To open the invoice record, click on preview icon next to the invoice accordion row, and to view the latest Invoice PDF or create a new Invoice record with its Invoice Line Items table click on the PDF icon.



4. ER Diagram



5. Support

Victory Vista CRM offers a comprehensive support system to ensure that users have a seamless experience while using the app.

For any technical issues, feature requests, or feedback, you can reach out to our support team through the following channels:

- **Email:** contact@kryaconsulting.com
- **Phone:** +91-9582388885, +91-9582388885
- **Website:** www.kryaconsulting.com