

CoolSales

User Manual

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Welcome

Welcome to CoolSales!

Thank you for purchasing our product.

Coolshop

Born in 2010, we leverage our country's world-renowned talents in creativity and design, writing cutting-edge code.

In 2015 we founded a new branch in Rotterdam, in 2018 Coolshop Inc. in Chicago, and in 2019 in Dubai.

In Coolshop we believe manufacturers put a lot of effort into defining their product's features and selling points, and our mission is to make sure 100% of that value is delivered to the buyer.

Solution-based selling is hard, it requires integration with multiple data sources and deep product knowledge. Our solution integrates those data with salesmen insights and best practices to maximize efficiency.

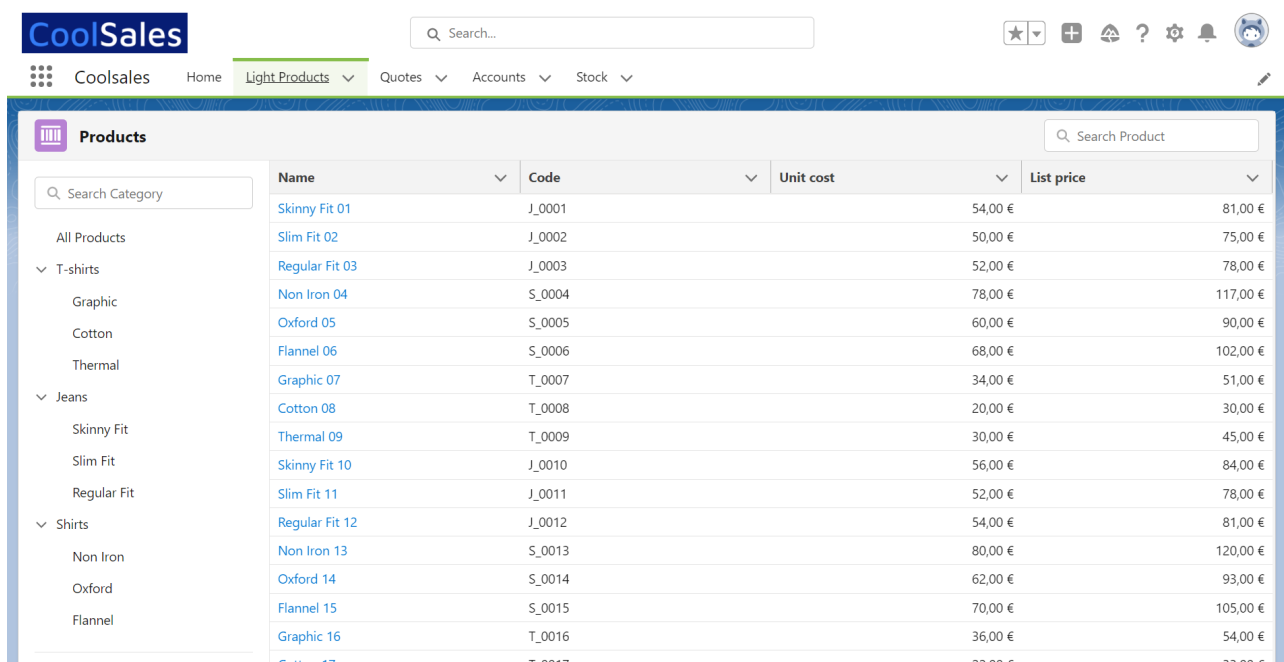
We have experience enhancing the public-facing lead generation process, all in one sales support app with configurators and Product Information Managers (PIM) to deliver all the value you create in any sales environment.

Main Concepts

The product interface consists mainly of two tabs: Products and Quotes.

Products

Product List



The screenshot shows the 'CoolSales' application interface. At the top, there's a navigation bar with 'CoolSales' logo, a search bar, and several icons. Below the navigation bar, there's a 'Products' tab selected. On the left side, there's a sidebar with a 'Search Category' input and a list of categories: 'All Products', 'T-shirts', 'Jeans', and 'Shirts'. Each category has sub-items. The main area displays a table of products with columns: 'Name', 'Code', 'Unit cost', and 'List price'. The table lists 17 products, including 'Skinny Fit 01' through 'Cotton 17'.

Name	Code	Unit cost	List price
Skinny Fit 01	J_0001	54,00 €	81,00 €
Slim Fit 02	J_0002	50,00 €	75,00 €
Regular Fit 03	J_0003	52,00 €	78,00 €
Non Iron 04	S_0004	78,00 €	117,00 €
Oxford 05	S_0005	60,00 €	90,00 €
Flannel 06	S_0006	68,00 €	102,00 €
Graphic 07	T_0007	34,00 €	51,00 €
Cotton 08	T_0008	20,00 €	30,00 €
Thermal 09	T_0009	30,00 €	45,00 €
Skinny Fit 10	J_0010	56,00 €	84,00 €
Slim Fit 11	J_0011	52,00 €	78,00 €
Regular Fit 12	J_0012	54,00 €	81,00 €
Non Iron 13	S_0013	80,00 €	120,00 €
Oxford 14	S_0014	62,00 €	93,00 €
Flannel 15	S_0015	70,00 €	105,00 €
Graphic 16	T_0016	36,00 €	54,00 €
Cotton 17	T_0017	22,00 €	33,00 €

Products List

The first tab is dedicated to products. Upon entering, the user will notice the page is divided into two macro sections.

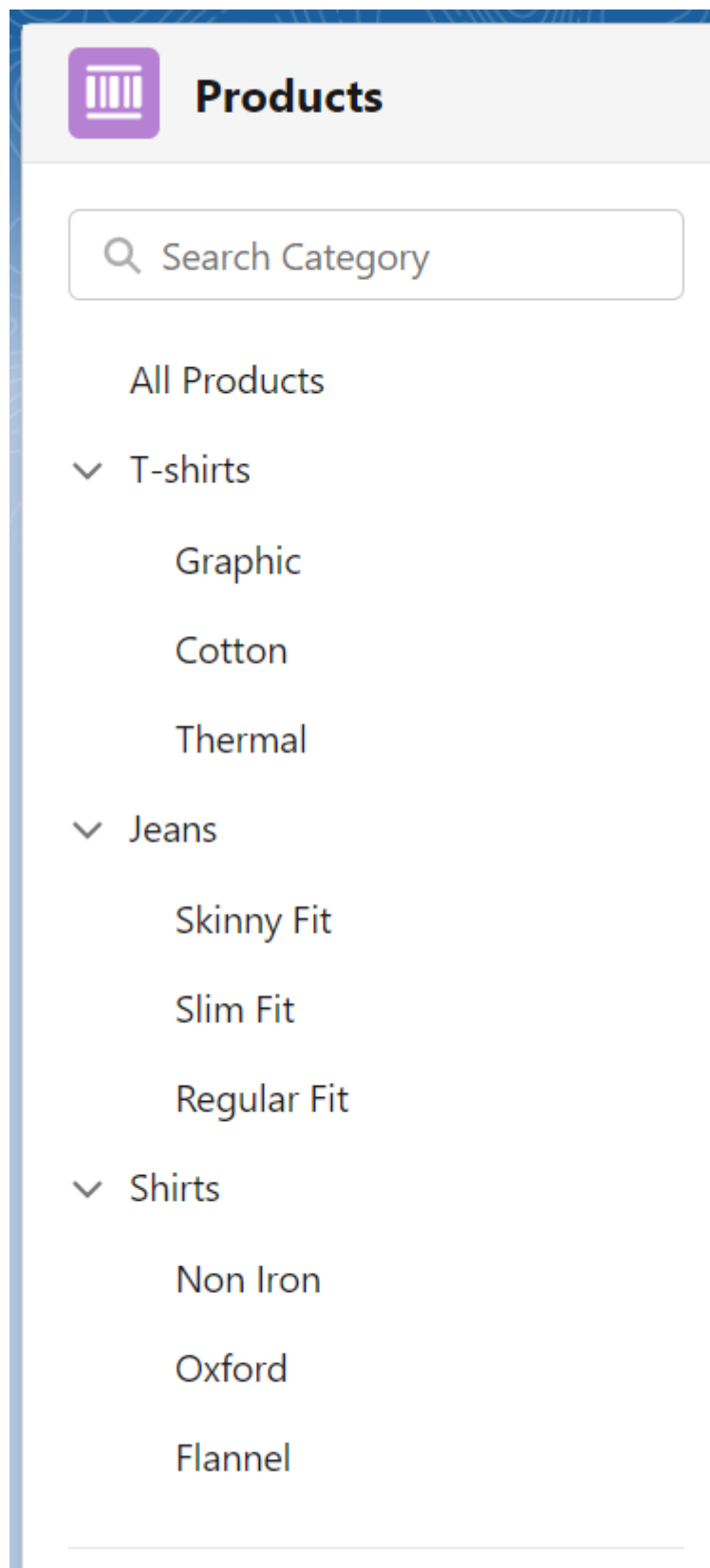
The main part is dedicated to the list of products with some basic information such as:

- Name of the product
- Code
- Unit cost
- List price

On the left shoulder, on the other hand, it is available the filter functionality consisting of (from top to bottom):

- a search bar filtering the categories listed below

- a filter of the product categories currently in the system
- a filter for tech features currently present in the system



Filters section in Product List

Product Detail

The screenshot shows the CoolSales interface. At the top, there's a navigation bar with 'CoolSales' logo, a search bar, and icons for star, plus, home, help, settings, and notifications. Below the navigation bar, there's a breadcrumb trail: 'Coolsales' > 'Home' > 'Light Products' > 'Quotes' > 'Accounts' > 'Stock'. The main content area is divided into three sections:

- Product Summary (Top Left):** Displays 'Product Slim Fit 02', 'Code J_0002', 'Unit cost 50,00 €', and 'List price 75,00 €'.
- Product Image and Description (Middle Left):** Shows a pair of light-colored jeans. The title is 'Slim Fit 02' with the description 'A Slim Fit Jeans tailored for everyone!'. There are tabs for 'Jeans' and 'Slim Fit'.
- Configurable Features (Right):** Shows the 'Total product price' as 75,00 €. It includes buttons for 'Add to existing quote' and 'Add to new quote'. Below these are 'Configurable features' with 'Hide Codes' and 'View in list' toggles. The features are categorized by 'Color' (Black, Blue, Grey) and 'Length' (28, 30, 32, 34). Each category has a table with codes and quantities.

Products Detail

Clicking on the single product opens the product detail page which is composed of three macro sections.

The first on the top left summarizes the main information of the product which are:

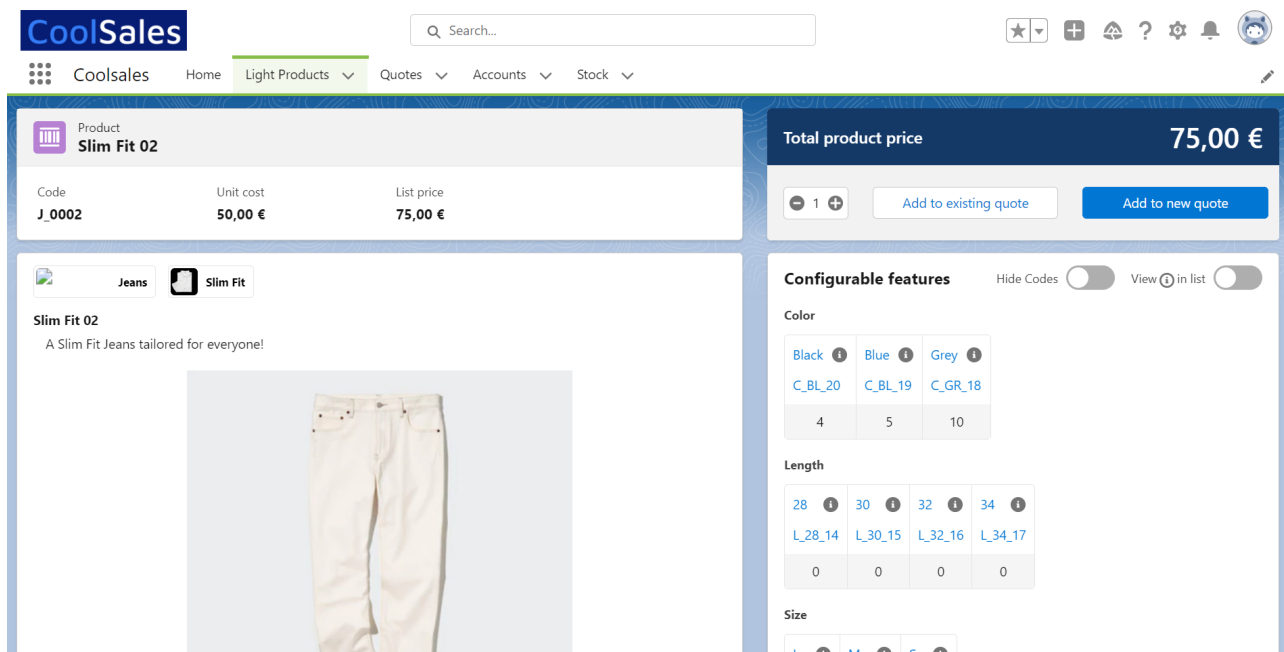
- Name
- Code
- Unit cost
- List price

Below, the main section dedicated to

- Categories associated with the product
- Description
- Photos

Configure a product

Some products might have the possibility to configure some aspects of it. In this case, the layout is a bit different showing a "Configurable features" box on the right section of the page.



Configurable Products Detail

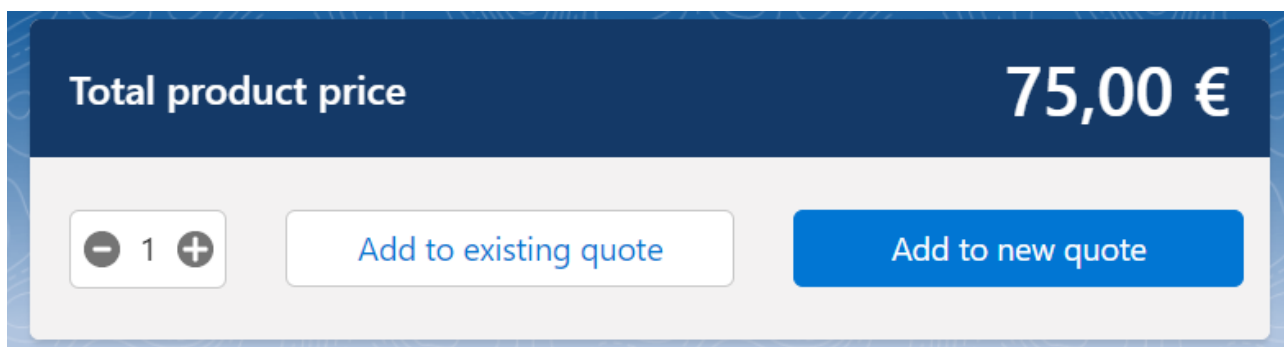
For each feature it will be possible to select one of the characteristics present in the list. Each feature will be shown as a separate dedicated line.

In the top right corner, the user has the possibility to select two settings:

- Hide Codes toggle: shows or hides the related code of the options
- View info: shows or hides a more detailed description of the single option

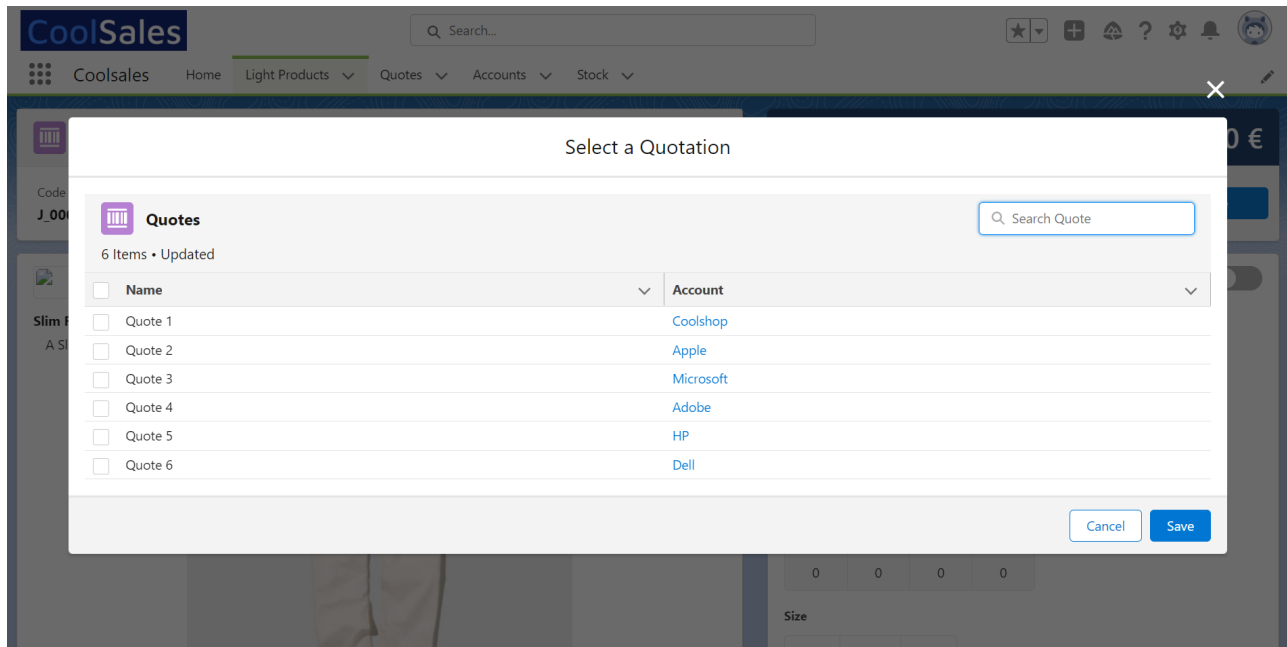
Add the product to a quote

In the top right box the user can change the quantity and decide whether to add this product to an already existing quote or create it from scratch.



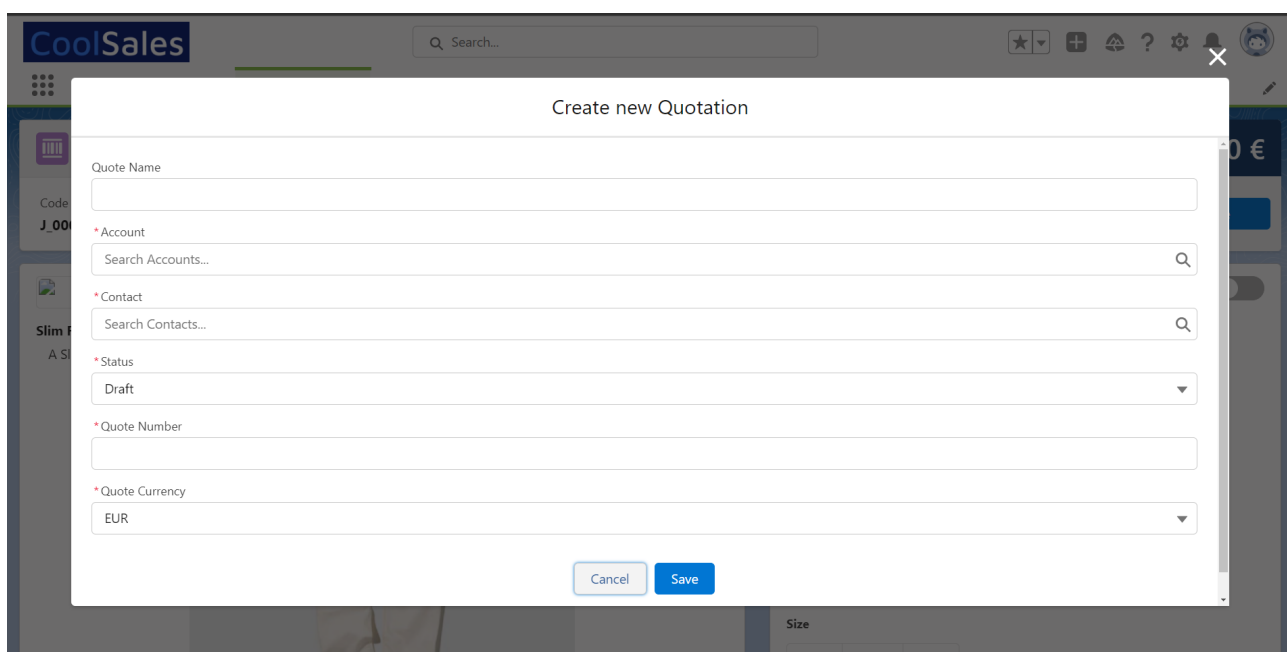
Top right box detail

In the first case, a pop-up will be presented to the user with a list of quotes to which the user can decide to add the product. Simply click on the square checkbox on the left and then on Save at the bottom right. Thereafter the quota will be displayed with the added product.



Quotes List

Alternatively, the add to New quote button will open a form in a pop-up that allows the user to enter the data of the new quote. Once filled in a new quote will be created and the specified product will be added.



New quote form

Quotes

How to create a new quote

Users can create a new quote from two different entry points:

- Quote tab
- Product Detail Page

Create a quote from the 'Quotes' tab

Users can click on the 'Quotes' tab to access the list of quotes. To create a new quote, users will need to click on the 'New' button on the top right of the list.

	Quote Name ↑	Account	Status	Total Price
1	Quote 1	Coolshop	Draft	0,00 €
2	Quote 2	Apple	Draft	0,00 €
3	Quote 3	Microsoft	Draft	0,00 €
4	Quote 4	Adobe	Draft	0,00 €
5	Quote 5	HP	Draft	0,00 €
6	Quote 6	Dell	Draft	0,00 €

List of the quotes

By clicking on the button a pop-up will show and the users will be asked to enter the main information of a quote:

- **Quote name**
- **Account** it can be chosen an existing account of their choice or create a new one
- **Contact** users can choose an existing account or create a new one
- **Status** this field identifies the status of the quote. Users can select a value within the following; draft, presented, closed-won or closed-lost
- **Quote Number**
- **Quote currency**

New Quote Pop-up

After entering all the required information, and saving the item, users will be redirected to the quote detail page.

Quote detail page

Create a quote from the 'Products' tab

The second entry point to create a quote is by accessing the 'Products' tab.

CoolSales

Coolsales

Home

Light Products

Quotes

Accounts

Stock

Q Search...

★

+

?

Products

Q Search Product

Q Search Category

All Products

T-shirts

Graphic

Cotton

Thermal

Jeans

Skinny Fit

Slim Fit

Regular Fit

Shirts

Non Iron

Oxford

Flannel

Name	Code	Unit cost	List price
Skinny Fit 01	J_0001	54,00 €	81,00 €
Slim Fit 02	J_0002	50,00 €	75,00 €
Regular Fit 03	J_0003	52,00 €	78,00 €
Non Iron 04	S_0004	78,00 €	117,00 €
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Cotton 08	T_0008	20,00 €	30,00 €
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Skinny Fit 10	J_0010	56,00 €	84,00 €
Slim Fit 11	J_0011	52,00 €	78,00 €
Regular Fit 12	J_0012	54,00 €	81,00 €
Non Iron 13	S_0013	80,00 €	120,00 €
Oxford 14	S_0014	62,00 €	93,00 €
Flannel 15	S_0015	70,00 €	105,00 €
Graphic 16	T_0016	36,00 €	54,00 €

Products List Page

After selecting a product the user will land on the product detail page. Here the user will be able to configure the product and select the quantity (read how in the 'product' section on this document).

CoolSales Search... ★ + 🔍 ? ⚙️ 🔔 👤

Coolsales Home **Light Products** Quotes Accounts Stock

Product Cotton 08

Code **T_0008** Unit cost **20,00 €** List price **30,00 €**

Total product price 30,00 €

- 1 + Add to existing quote Add to new quote

Configurable features Hide Codes View 1 in list

Color

Blue	Green	White
C_BL_67	C_GR_68	C_WH_69
4	4	0

Neck

Crew	Polo	V-Neck
N_CR_70	N_PO_71	N_V_72
0	10	3

Size

L	M	S
0	1	0

Cotton 08
A Cotton T-shirts tailored for everyone!



Products Detail page

Once configured the product, the salesperson can create a quote by clicking on 'Add to new quote'.

The pop-up 'create new quote' will be displayed.

Create a new quote pop-up on the product detail page

How to edit quote detail info

General quote data

By clicking on 'view info details' in the central top part of the quote detail page, the user will see the account & contact information and the quote general data.

Products	Unit Cost	List Price	Discount	Unit Price	Quantity	Total Price
Cotton 08	20,00 €	30,00 €	0%	30,00 €	1	30,00 €
Total items						30,00 €

Quote detail page - quote data

To modify the data, users will click on one of the 'pencil' icons and the editable fields will be unlocked

Quote detail page - quote data edit mode

To save the changes the user has to click on the 'update' button at the bottom of the quote data form. After submitting the changes the fields will show again the edit icons.

Quote status

The quote status is shown in the bar placed in the top central part of the quote detail info section

Quote detail page - quote data edit mode

To progress the status of the quote, the salesperson can click on 'presented' or 'closed' status.

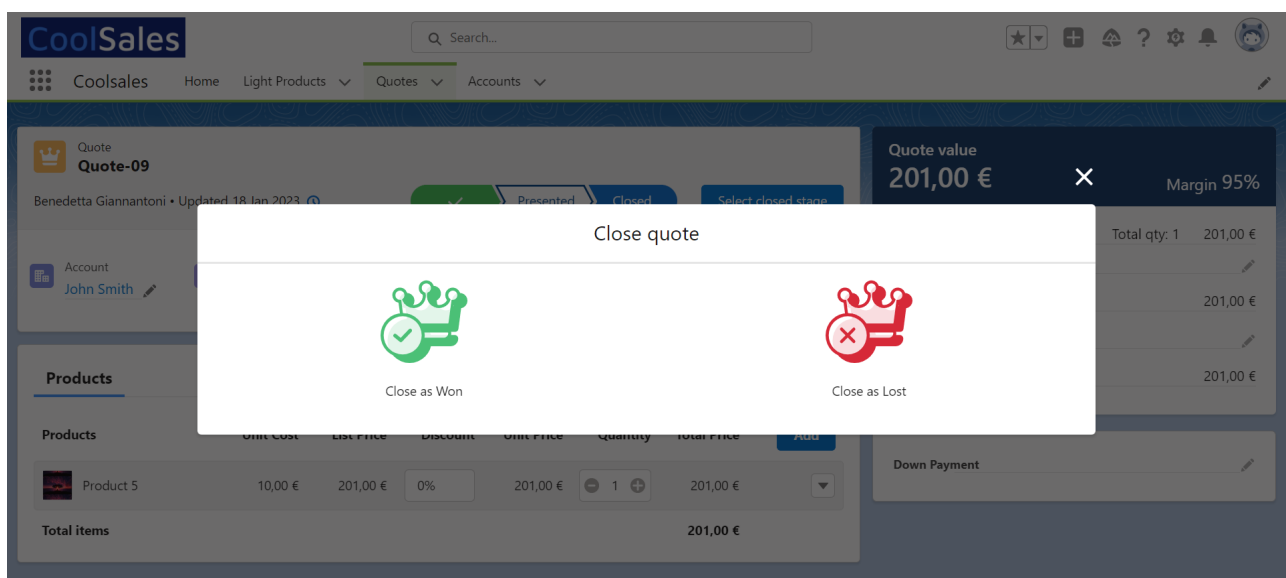
Possible quote status:

- **Draft**: this is the default value associated to a quote when created
- **Presented**: this stage identifies that the quotation has been shared or ready to be shared with the customers
- **Closed**

- **Won** this stage identifies the finalization of the quote and the approval from the customers.
- **Lost** this stage identifies that the quotation has been rejected

The progress from *draft* to *presented* can be achieved just clicking on the 'presented' button and clicking on 'Mark stage as complete' to save the change.

The progress from *draft* to *closed* or *presented* to *closed*, requires a couple of additional steps. After selecting the 'closed' option, the button on the left will displayed a different label 'Select closed stage'. By clicking the button a pop-up window will ask the user to select the close reason: *won* or *lost*.



Closed reason pop-up

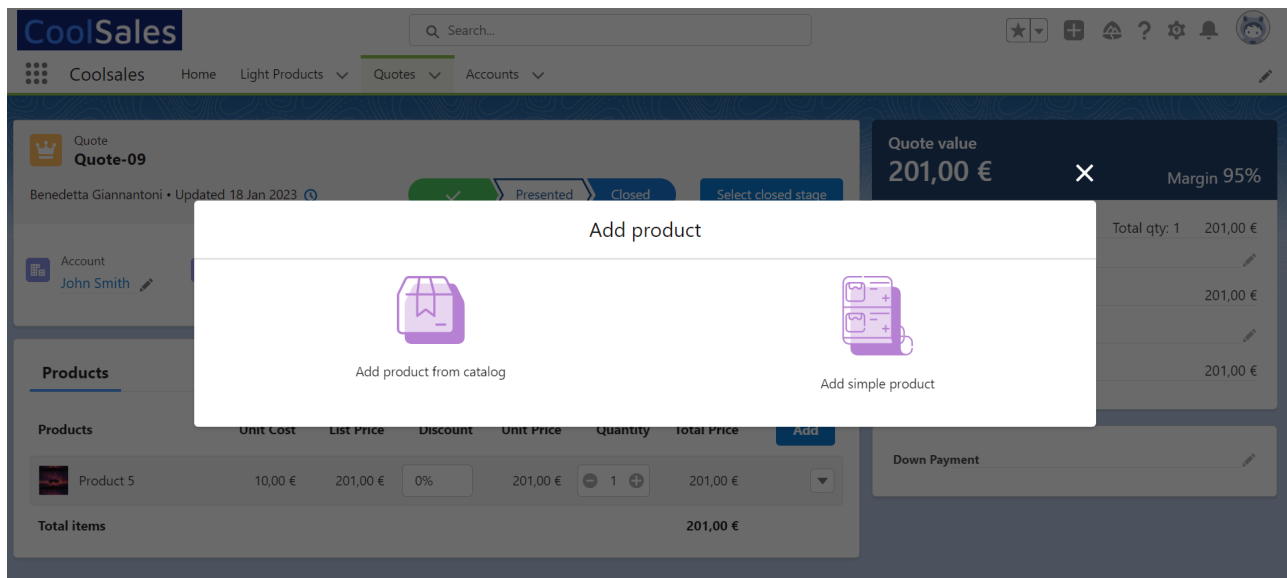
How to add a new quote item to the quote

It is possible to add two types of products to the quote:

- **Catalog product** This feature allows the salesperson to select a product already available in the catalogue
- **Simple product** This feature allows the salesperson to add to the quote a product not available in the catalogue

To add a product to the quotation the salesperson must click on the 'add' button placed on the top right corner of the product section within the quote detail page.

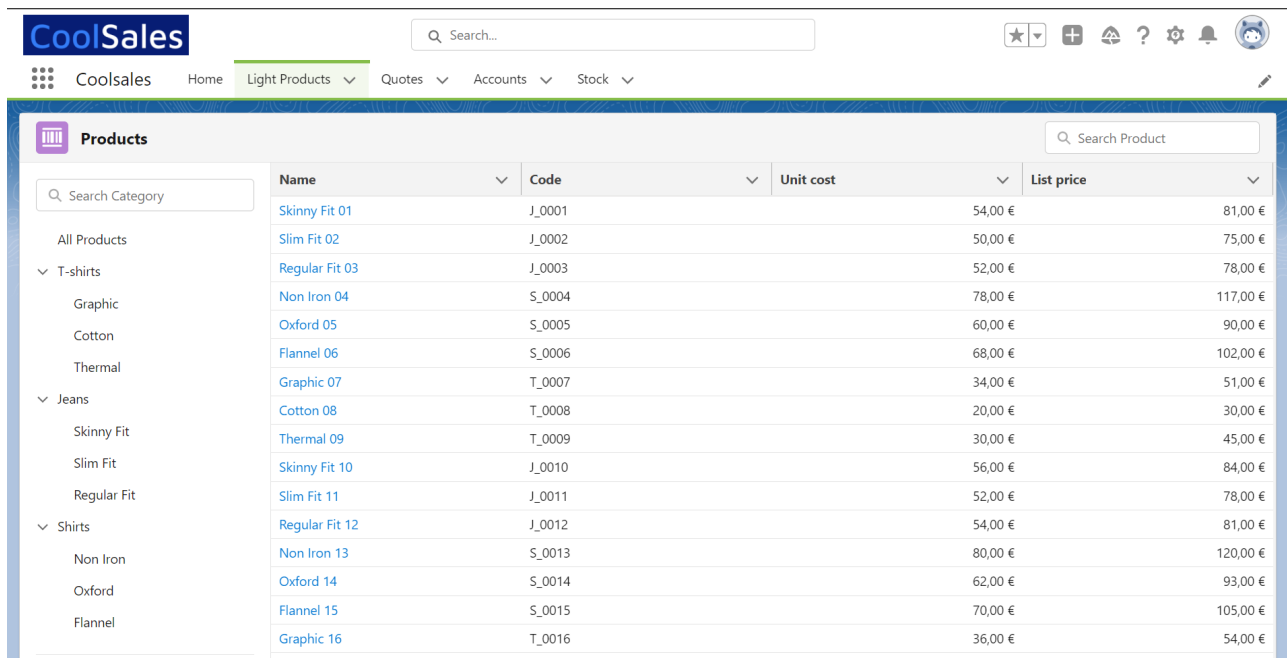
A pop-up window will ask salespeople to choose which type of product they would like to add to the quotation.



Add product pop-up

Add product from catalogue

If the user clicks on the 'product from catalog' call to action, the user will be redirected on the Product List page



Product List Page

After clicking on the product of interest, the product detail page will be displayed.

The screenshot shows the 'CoolSales' interface. At the top, there's a navigation bar with 'CoolSales', 'Home', 'Light Products', 'Quotes', 'Accounts', and 'Stock'. A search bar is on the right. The main content area is divided into three sections:

- Product Information:** Displays 'Product Thermal 18', 'Code T_0018', 'Unit cost 32,00 €', and 'List price 48,00 €'.
- Image Gallery:** Shows a white turtleneck sweater. Below it, the text reads 'Thermal 18' and 'A Thermal T-shirts tailored for everyone!'.
- Configurable features:**
 - Color:** Three options: Blue (C_BL_157, 4), Green (C_GR_158, 4), and White (C_WH_159, 0).
 - Neck:** Three options: Crew (N_CR_160, 0), Turtle (N_TU_161, 10), and V-Neck (N_V_-162, 3).
 - Size:** A row of size selection buttons: S, M, L, XL, XXL.

On the right side, a 'Total product price' of 48,00 € is displayed. Below it, there are buttons for 'Back to Quote' and 'Add to quote'.

Product Detail Page

Here the user will be required to configure the product, and if satisfied with the configuration, the salesman will be able to add the product to the quote by clicking on the 'Add to quote' button on the top right of the page.

This screenshot is identical to the previous one, but with a red box highlighting the 'Add to quote' button in the top right corner. A small tooltip 'Add to existing quote' is visible next to the button.

Product Detail Page - Add to existing quote

Add a simple product

If the user clicks on 'Simple product', it will immediately appear a new quote line item in

the Products section.

CoolSales Search...

Quotes Accounts Stock

Quote 5
Mary Johns • Updated 27 Jan 2023

Draft Presented Closed Mark stage as complete

Account HP Contact Robert Arment Owner ID Estimated Close Date View info details

Products	Unit Cost	List Price	Discount	Unit Price	Quantity	Total Price
Cotton 08	20,00 €	30,00 €	0%	30,00 €	1	30,00 €
Thermal 18	32,00 €	48,00 €	0%	48,00 €	1	48,00 €
Simple item	0,00 €	0,00 €	0%	0,00 €	1	0,00 €

Total items 78,00 €

Quote value 78,00 € Margin 33%

Products (3) Total qty: 3 78,00 €

Discount

Subtotal 78,00 €

Tax

Total Price 78,00 €

Down Payment

Here the users will need to enter the Product Name and the prices of the new product.

Pricing

Quote value 86,00 € Margin 37%

Products (1) Total qty: 1 86,00 €

Discount

Subtotal 86,00 €

Tax

Total Price 86,00 €

Down Payment

Pricing box detail

The pricing box is dedicated to the calculation of the various amounts. The Quote Value reported in the blue box on top is the sum of the product's price.

Then, in the table below in order from top to bottom, the user will find:

- **Products:** Quantity and sum of the total price of all products present in the quote
- **Discount:** the percentage of discount on the above price. The user can edit it by clicking the pencil icon and then saving
- **Subtotal:** The calculated value subtracting the discount mentioned above
- **Tax:** Value in percentage of the tax. The user can edit it by clicking the pencil icon and then saving
- **Total Price:** Final calculated value keeping into account also the taxation
- **Down Payment:** In this box, the user can save the amount of any down payment agreed upon with the customer