

# Customer Sales view

Follow link for full overview of app

<https://youtu.be/BkTi3nAD56o>

(1:28)


**Customers (6)**

Search

- ServiCam 10001
- SlimWare Utilities 10002**
- uKnow 10003
- Bird View 10004
- Sparrow 10005
- Vermeeren Bros 10006

**Overview**





**SlimWare Utilities**  
10002



▼ Sales Area


Sales Organisation: London  
Division: Mobile  
Distribution Channel: Direct Drop

**New Specials for customer**

**Customer Contacts**



▼ Sales



**Essie Smit**

Contact Info:

- Cell Phone: +264817755898
- Office Phone: 064254
- Fax: 064255
- Email Address: smit@SlimWare.nz

 **Order** 

The screenshot displays a customer overview interface. On the left, a list of customers is shown with a search bar. The selected customer is 'ServiCam 10001'. The right panel provides details for this customer, including a search bar, the company logo 'SERVICAM.COM KEEP AN EYE ON IT', a 'Sales Area' dropdown, and sales organization information: 'Sales Organisation: Windhoek', 'Division: Consumer electronics', and 'Distribution Channel: Direct Drop'. A notification banner states 'Please notify customer of price increase'. Below this, there are icons for user, credit, currency, and shopping. The 'Current Items on Special Offer' section lists two items: 'Energy Generating Shoe' (E-Shoe) priced at 3800 EUR, and '20MP Camara Drone' (Drone) priced at 15300 NAD. Each item has an 'Order' button. At the bottom right, there is a global 'Order' button and an envelope icon.

## SALES OVERVIEW PER CUSTOMER

### THE STORY

It is a constant and tedious task navigating between screens and views looking for sales related information for a specific customer. Debtor clerks, telesales, sales reps, sales managers and account managers all need to see this info while doing recons etc.

Speed of information gathering is most critical with telesales. They will most likely have the customer on the line whilst looking for information to answer questions. Whilst looking for this info they would need to navigate from information (master data) screens to credit screens and even do a search for orders before being able to answer simple questions.

With this app they will be able to select the customer when they answer the phone. All sales related information will be accessible from this app. This could include contact information, billing information or a list of sales orders. When viewing the credit status you will be able to see the current credit status and blocked orders if they exist.



# Sandra

Telesales consultant

“ Its all about customer experience, knowing what the want before they know it is key to success ”

## ABOUT

29, Single, 4 years of sales experience

I enjoy working with customers and pride myself with excellent customer satisfaction

## WORKS WITH

Customers and account managers as well as debtors apartment and sales reps

## JOB RESPONSIBILITIES

- Assisting customers with order info as needed
- Capturing orders
- Driving sales

## NEEDS

- To be able to see all information in one place
- Being able to provide customers with answers quicker

## MAIN GOALS

- Ensuring customer satisfaction
- Providing accurate feedback to customers
- Driving sales

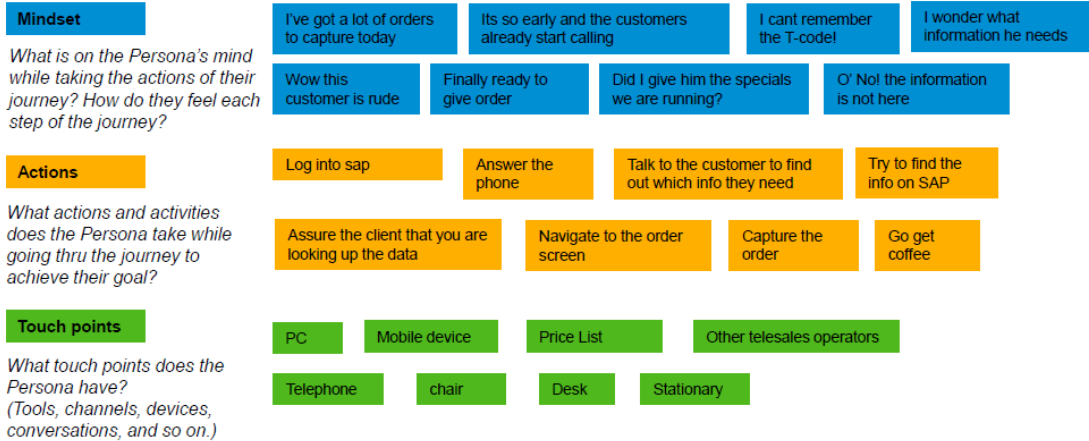
## PAIN POINTS

- Having to look/search for information required
- Capturing orders only to find out that the customer is over their credit limit
- Navigating to different screens constantly to look for related data

## User Experience Journey

### Current User Experience Journey

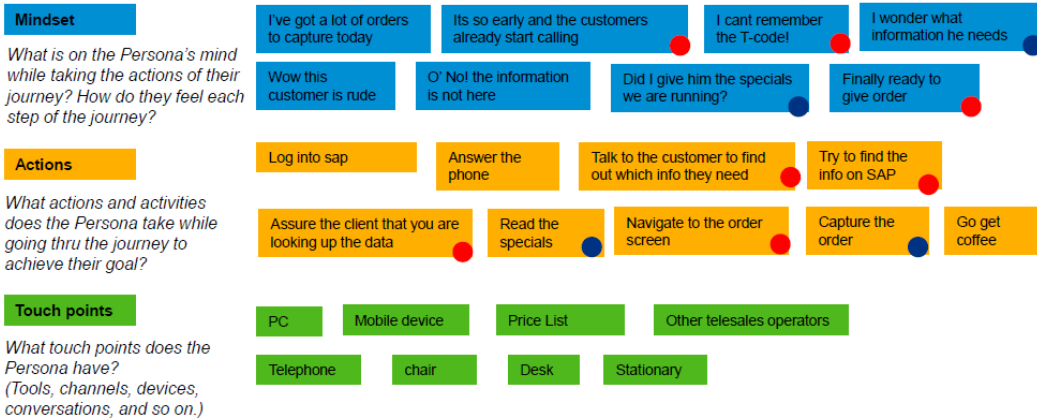
Duration of the Journey: 45 min



## User Experience Journey

### Current User Experience Journey

Duration of the Journey: 45 min



# THE POINT OF VIEW

**Sandra, the telesales consultant** needs a way to **collectively see all relative sales information for a specific customer in one place** so that **she can effortlessly and quickly assist customers while on the telephone.**

## Build Study

<https://standard.experiencesplash.com/home/projects/29a78430790242fb0bae71cd/research/participant/1ec94b30ca8d52af0bae8c08>

# MOCKUP

