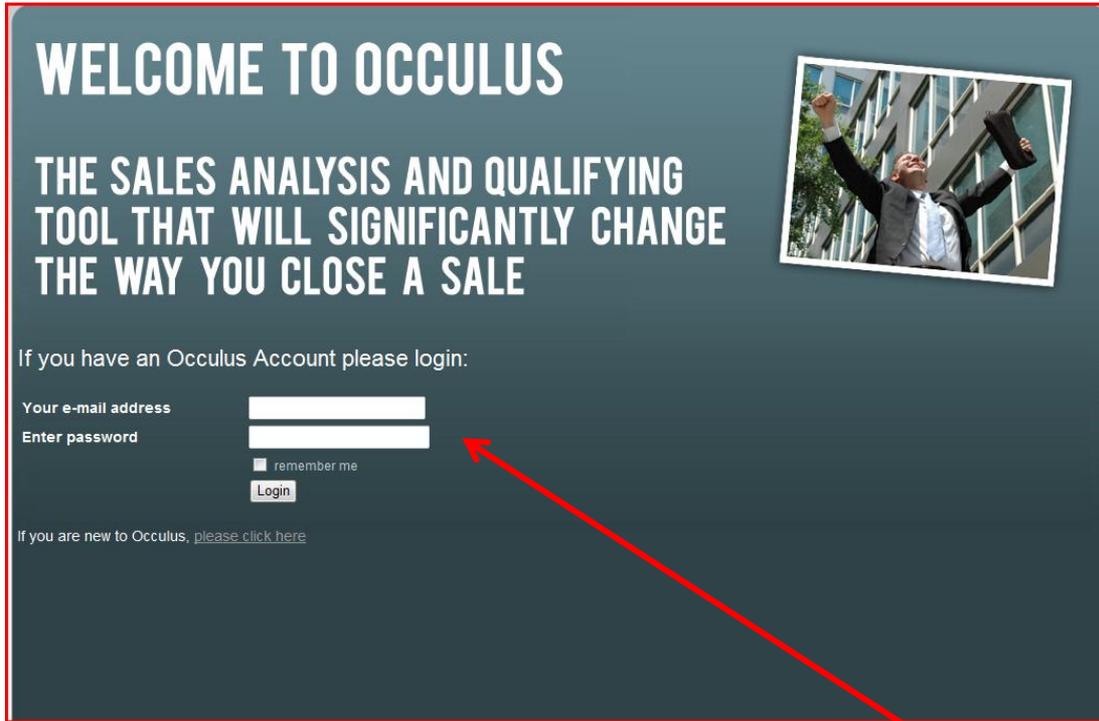




Sales Manager
Getting Started with Occulus

Support@OcculusSales.com

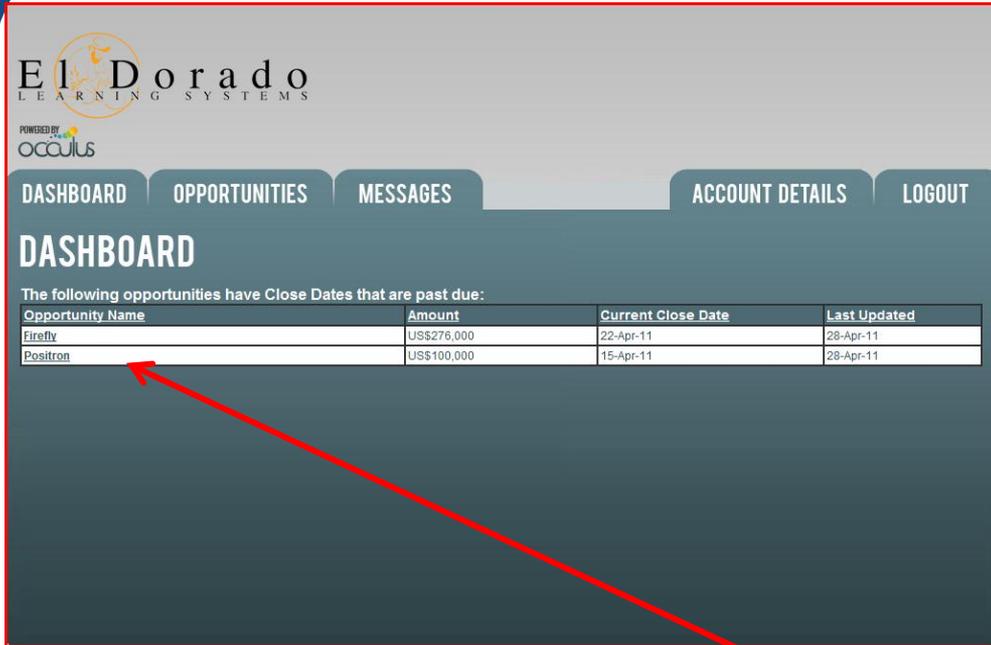


Go to:
www.OcculusSales.com

Figure 1: Oculus Home Page

Enter your email address and password; click "LOGIN" and your Dashboard will appear, Figure 2.

A temporary password has been assigned to you. It should be changed when you first log in – see Figure 3, Click ACCOUNT DETAILS, for instructions on how to change your password.



The screenshot shows the 'Sales Manager DASHBOARD' interface. At the top left is the 'El Dorado LEARNING SYSTEMS' logo, with 'POWERED BY OCCULUS' below it. A navigation bar contains buttons for 'DASHBOARD', 'OPPORTUNITIES', 'MESSAGES', 'ACCOUNT DETAILS', and 'LOGOUT'. The main content area is titled 'DASHBOARD' and features a heading: 'The following opportunities have Close Dates that are past due:'. Below this is a table with four columns: 'Opportunity Name', 'Amount', 'Current Close Date', and 'Last Updated'. The table lists two opportunities: 'Firefly' with an amount of 'US\$276,000', a current close date of '22-Apr-11', and a last updated date of '28-Apr-11'; and 'Positron' with an amount of 'US\$100,000', a current close date of '15-Apr-11', and a last updated date of '28-Apr-11'. A red arrow points from the 'Positron' opportunity name to the explanatory text on the right.

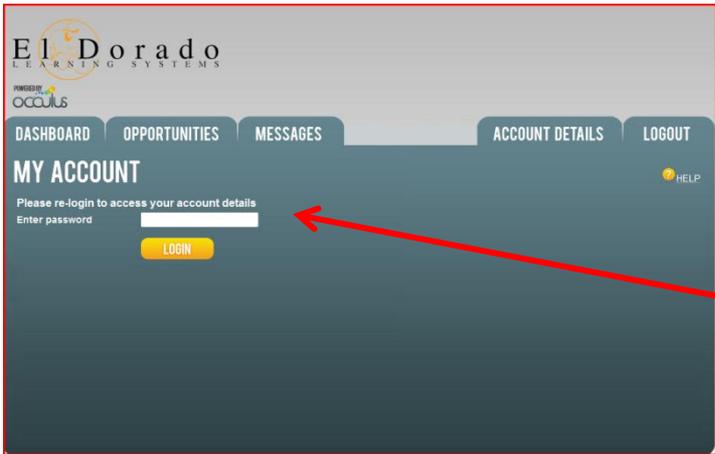
Opportunity Name	Amount	Current Close Date	Last Updated
Firefly	US\$276,000	22-Apr-11	28-Apr-11
Positron	US\$100,000	15-Apr-11	28-Apr-11

Figure 2: Sales Manager DASHBOARD

Dashboard shows any Opportunities that have a Close Dates that are past due.

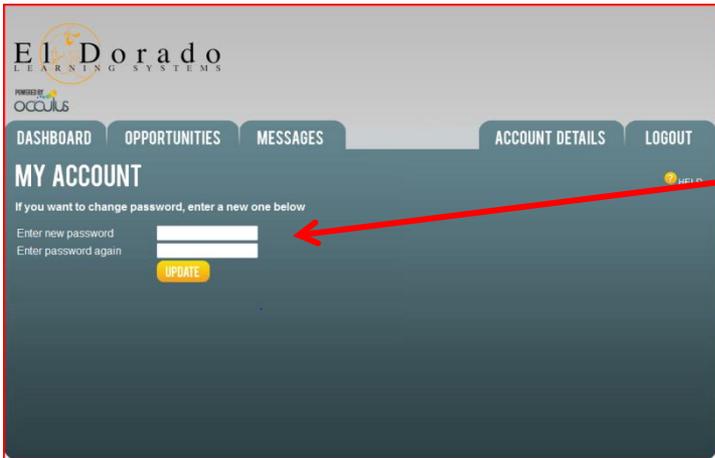
Click on the Opportunity Name to see the details and the Sales Rep who owns this Opportunity.

Changing your Password



Click ACCOUNT DETAILS:
Enter your password

Fig 3: Account Details



Enter your new Password
Confirm the Password

Click OPPORTUNITES

Fig 4: Change Password

Close Date Range: Start -> End
 Selects ACTIVE or CLOSED Opportunities with a
 Close Date in this date range.

Close date between and
 Show opportunities for: with status:

Company Name	Opportunity Name	Type of Sale	Owner	Amount	Close Date	DoQ	Winning	CF	Close	Last Updated	VIEW NOTES
Smith & Jones	Firefly	Consulting	Denham, John	US\$276,000	22-Apr-11	86%	76%	75%	62%	28-Apr-11	VIEW NOTES
Lasiter Inc.	Six P2	Software	Denham, John	US\$300,000	31-May-11	65%	68%	64%	74%	28-Apr-11	VIEW NOTES
Fly by night Inc	Silver	Outsourcing	Thompson, Michelle	US\$500,000	19-Aug-11	87%	79%	79%	74%	28-Apr-11	VIEW NOTES
DeBeers	Gold mine	Hardware	Thompson, Michelle	US\$500,000	30-Sep-11	17%	44%	24%	86%	28-Apr-11	VIEW NOTES
Nuclear Inc.	Positron	Solution	Harding, Mel	US\$100,000	30-Apr-11	56%	73%	68%	80%	28-Apr-11	VIEW NOTES
Waterworks Inc	Little Pad	Solution	Smith, Fred	US\$350,000	31-May-11	64%	57%	53%	78%	28-Apr-11	VIEW NOTES
Longfellow Industries	Live Wire	Systems	Denham, John	US\$75,000	31-May-11	82%	79%	78%	58%	28-Apr-11	VIEW NOTES
Igloo Inc	Snowshoe	Software	Smith, Fred	US\$250,000	24-Jun-11	40%	77%	66%	78%	28-Apr-11	VIEW NOTES
TOTAL				US\$2,351,000							

EXPORT TO EXCEL
 PRINT SUMMARY
 DoQ = Degree of Qualification
 CF = Confidence Factor
 >>NEW OPPORTUNITY

Can display Opportunities for ALL
 Sales Reps or specific Sales Reps

Displays ACTIVE or
 CLOSED Opportunities.
 Default = ACTIVE Opportunities

The OPPORTUNITY LIST all the sales opportunities your
 Sales Reps are pursuing and gives the following summary
 Information:

- Company Name
- Opportunity Name
- Type of Sale
- Owner
- Opportunity Amount
- Close Date
- Degree of Qualification (“DoQ”)
- Probability of Winning (“Winning”)
- Confidence Factor (“CF”)
- Probability of Closing by the Close Date (“Closing”)
- Last Updated
- NOTES

Fig 5: OPPORTUNITIES

EXPORT the List to an Excel file for
 integration into other applications.

PRINT SUMMARY allows you
 to print the List.

If the Sales Manager has his/her own Opportunities
 he/she can add a new opportunity by clicking:
 “>>NEW OPPORTUNITY”

Opportunity = Positron is owned
 by Sales Manager, name in white.

Lists all **ACTIVE** Opportunities for ALL Sales Rep with Close Dates between April 28 and Sep 30.

The screenshot shows the 'OPPORTUNITIES' page with the following data table:

Company Name	Opportunity Name	Type of Sale	Owner	Amount	Close Date	DoQ	Winning	CF	Close	Last Updated	VIEW NOTES
Smith & Jones	Firefly	Consulting	Denham, John	US\$276,000	22-Apr-11	86%	76%	75%	62%	28-Apr-11	VIEW NOTES
Lastier Inc.	Six P2	Software	Denham, John	US\$300,000	31-May-11	65%	68%	64%	74%	28-Apr-11	VIEW NOTES
Fly by night Inc	Silver	Outsourcing	Thompson, Michelle	US\$500,000	19-Aug-11	87%	79%	79%	74%	28-Apr-11	VIEW NOTES
DeBeers	Gold mine	Hardware	Thompson, Michelle	US\$500,000	30-Sep-11	17%	44%	24%	86%	28-Apr-11	VIEW NOTES
Nuclear Inc.	Positron	Solution	Harding, Mel	US\$100,000	30-Apr-11	56%	73%	69%	80%	28-Apr-11	VIEW NOTES
Waterworks Inc	Little Pad	Solution	Smith, Fred	US\$350,000	31-May-11	64%	57%	53%	78%	28-Apr-11	VIEW NOTES
Longfellow Industries	Live Wire	Systems	Denham, John	US\$75,000	31-May-11	82%	79%	78%	58%	28-Apr-11	VIEW NOTES
Igloo Inc	Snowshoe	Software	Smith, Fred	US\$250,000	24-Jun-11	40%	77%	66%	78%	28-Apr-11	VIEW NOTES
TOTAL				US\$2,351,000							

Can change the Close Date Range with the drop-down calendars

Can select ACTIVE Opportunities or CLOSED Opportunities

Click >> to refresh page

Can create a NOTE for each Opportunity

Fig 6: OPPORTUNITIES – con't

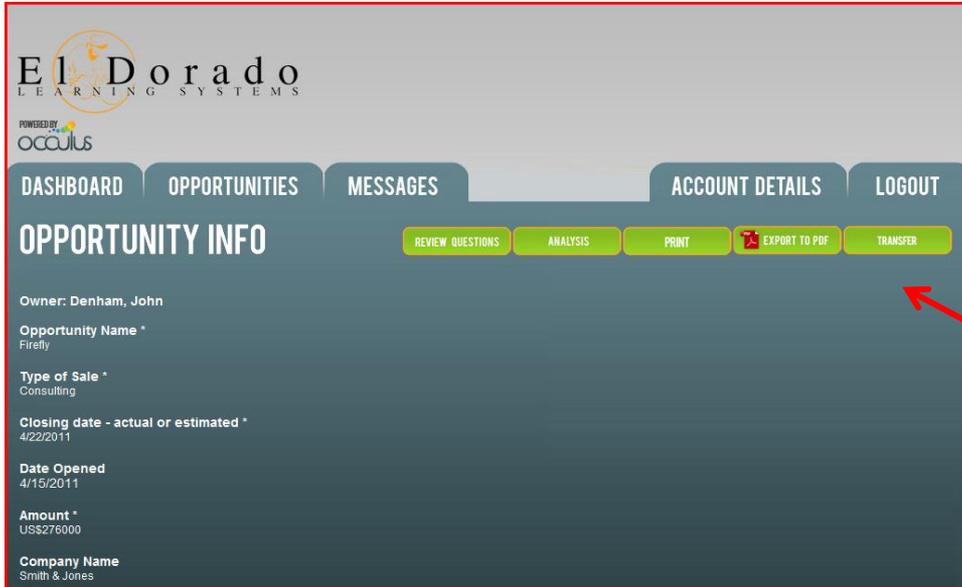
To review/update an ACTIVE Opportunity click on the Opportunity Name

NOTE:

An **ACTIVE** Opportunity is one that is **currently being pursued.**

A **CLOSED** Opportunity is one that is **no longer being pursued.**

Click Opportunity = Firefly



Opportunity = Firefly

Click REVIEW QUESTIONS to see how the Sales Rep answered the questions.

Click ANALYSIS to review the analysis.

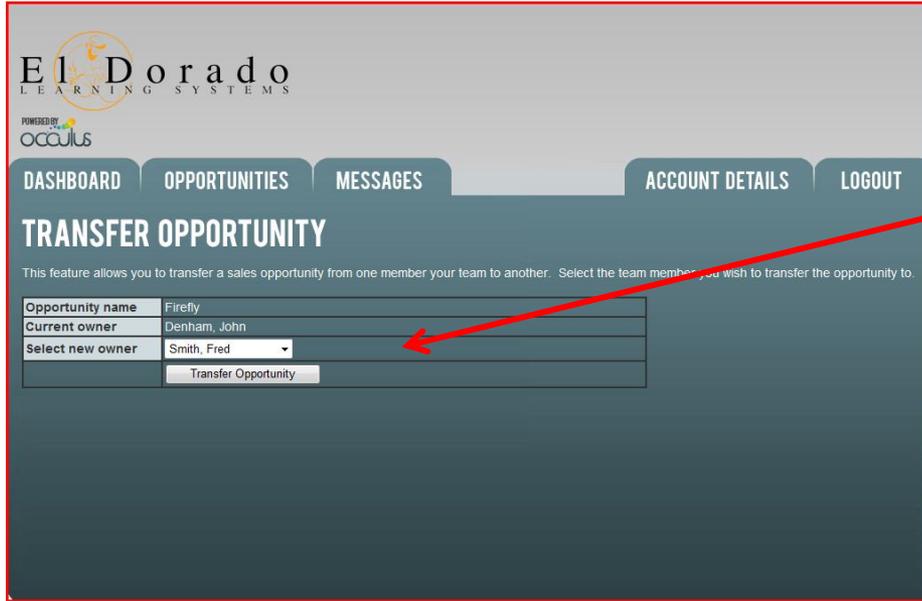
Click PRINT to print a copy of the Analysis

Click EXPORT TO PDF to create a PDF of the Analysis.

The Sales Manager can TRANSFER an Opportunity from the current Sales Rep to a different Sales Rep (including himself)

Fig 7: Reviewing an ACTIVE Opportunity

Click TRANSFER



El Dorado
LEARNING SYSTEMS

POWERED BY
occulus

DASHBOARD OPPORTUNITIES MESSAGES ACCOUNT DETAILS LOGOUT

TRANSFER OPPORTUNITY

This feature allows you to transfer a sales opportunity from one member your team to another. Select the team member you wish to transfer the opportunity to.

Opportunity name	Firefly
Current owner	Denham, John
Select new owner	Smith, Fred
<input type="button" value="Transfer Opportunity"/>	

Select the Sales Rep who this Opportunity will be transferred to and click TRANSFER OPPORTUNITY.

Confirm TRANSFER.

Fig 8: TRANSFERRING an ACTIVE Opportunity

NOTE: Only the Sales Manager who has Sales Reps reporting to him/her can transfer opportunities



*Analyze the sale;
Close the deal!*