

Biziverse Tutorials

CRM

How to Process Sales Orders?

Processing Sales Orders in Biziverse

Biziverse facilitates the entire flow of processing Sales Orders. This includes:

- View Pending / Completed Sales Orders with details on a click
- Create / Enter a Sales Order
- Edit / Modify / Cancel the Sales Order
- Assign the Sales Order to an executive
- Mark and Track Progress update of the Sales Order
- Status Update to the Customer by email / message

Business Dashboard



CRM

- Leads
- Prospects
- Inquiries
- Quotes
- Orders**
- Invoices
- Recovery
- Contracts
- Support

ERP

- Accounts
- Inventory
- Manufacturing

Network

- Connections
- Search

What's Next

Refer & Earn

Business Summary



Click on "Orders"

B2B Network

< 168 Connections

Online Expo for Used Textile Machinery Coming Soon

ERP Toolkit (Beta)

₹ Accounts Inventory Manufacturing Tasks (Coming Soon!)

Newsfeed

BIZIVERSE Business Dashboard

Processing of Sales Orders

- A2Z Machine Services**
Used Machines
We are looking for Used CNC Lathe machines
- Sam Instruments Private Limited**
Sam Instruments Private Limited
Leading manufacturer of temperature sensors accessories ;
- Standzo music**
musical instrument
if u want guitar...violin...casio keybaord..yamaha keyboaed ;
- Sadhya Overseas Educational Services**

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Orders

Sales & Services

Orders received from your customers

Pending
Processed
📈
🔄
+ Delivery
+ Add

Food Masala Alok Enterprise (#27)	100 no.s 08-May
15mm Spindle Ajit electrical company (#30)	10 no.s 15-May
Tiles AMBANI (#35)	100 no.s 18-May
15mm Spindle Aaram Engineerings (#36)	100 no.s 18-May
Laptop Bag Alok Enterprise (#37)	10 no.s 19-May
funds Alok Enterprise Pvt. Ltd. (#32)	12 no.s 22-May
Car Services AB software (#33)	22-May
Compressor Aaram Engineerings (#39)	1 no.s 24-May
Solar street Light	10 no.s

Processing of Sales Orders

Transform Sales!



- ✓ Order Status Updates
Empower customers; save time from follow-ups
- ✓ Timely Delivery
Track sales commitments; deliver orders punctually

- Overall View of Sales Orders
- Pending
 - Processed
 - Status update

CRM

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Orders

Sales & Services

Orders received from your customers

Status	Item	Customer	Quantity	Delivery Date
Pending	Food Masala	Alok Enterprise (#27)	100 no.s	08-May
Processed	15mm Spindle	Ajit electrical company (#30)	10 no.s	15-May
+ Delivery	Tiles	AMBANI (#35)	100 no.s	18-May
+ Add	15mm Spindle	Aaram Engineerings (#36)	100 no.s	18-May
	Laptop Bag	Alok Enterprise (#37)	10 no.s	19-May
	funds	Alok Enterprise Pvt. Ltd. (#32)	12 no.s	22-May
	Car Services	AB software (#33)		22-May
	Compressor	Aaram Engineerings (#39)	1 no.s	24-May
	Solar street Light		10 no.s	

Click on "Add"

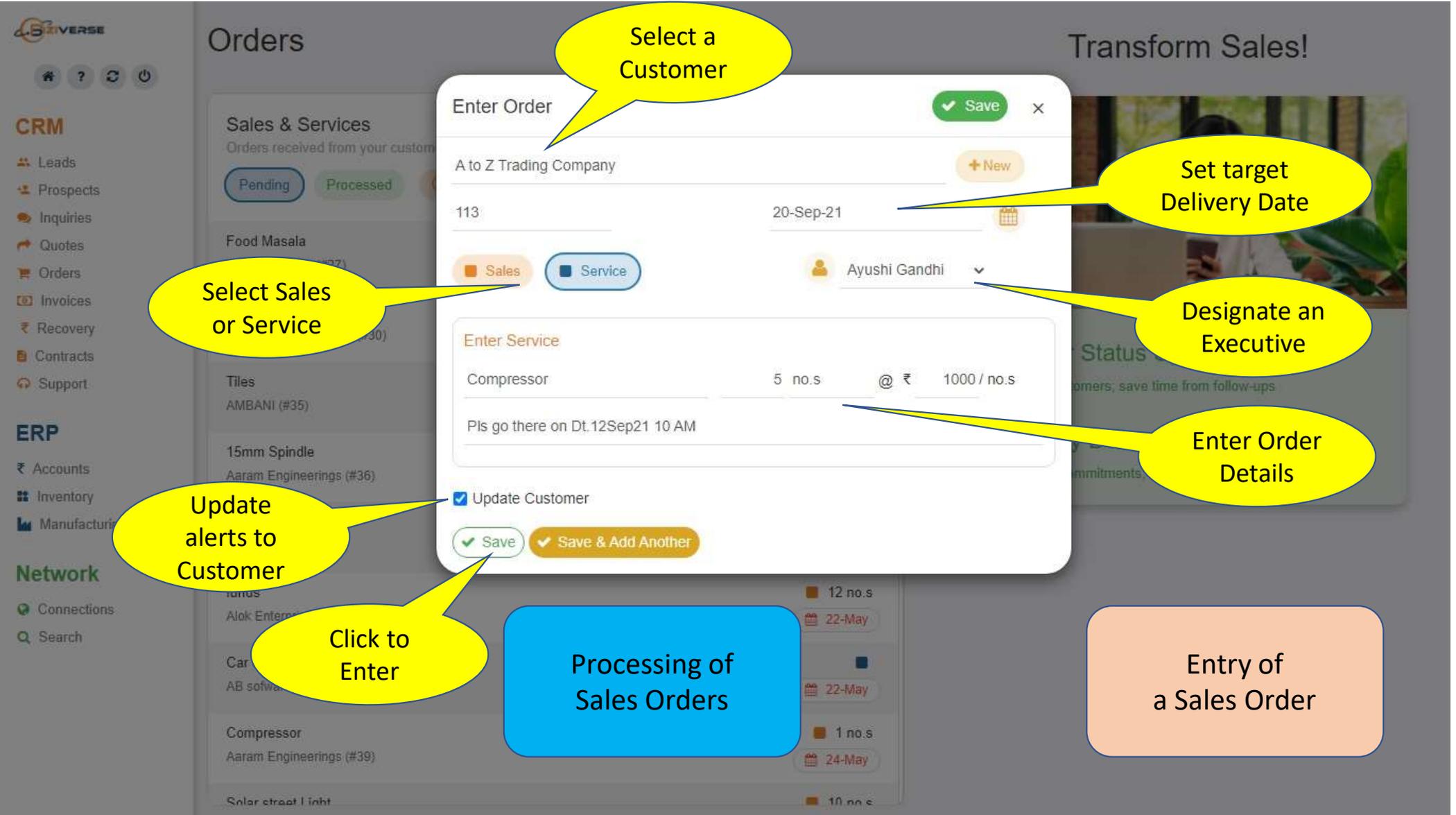
Processing of Sales Orders

Transform Sales!



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Adding a Sales Order



Select a Customer

Set target Delivery Date

Designate an Executive

Enter Order Details

Select Sales or Service

Update alerts to Customer

Click to Enter

Processing of Sales Orders

Entry of a Sales Order

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- ERP**
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- Network**
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Orders

Sales & Services

Orders received from your customers

Pending Processed

+ Delivery **+ Add**

LED Light Aarem (#105)	100 no.s 28-Aug
Ballpen Akash Computing Pvt. Ltd. (#110)	125 29-Aug
71161261-1 ABC Pvt. Ltd. (#107)	10 no.s 31-Aug
2 Burner A to Z Trading Company (#111)	10 no.s 07-Sep
Ballpen A to Z Trading Company (#112)	50 no.s 09-Sep
Ballpen A to Z Trading Company (#112)	50 no.s 09-Sep
Compressor A to Z Trading Company (#113)	5 no.s 20-Sep
CCTV AARMEE ENTERPRISES (#108)	10 no.s 23-Sep

New Sales Order added

Transform Sales!



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Empower customers; save time from follow-ups
- ✓ Timely Delivery**
Track sales commitments; deliver orders punctually

Processing of Sales Orders

Orders

Sales & Services

Orders received from your customers

Pending Processed

+ Delivery + Add

Ballpen 125

Akash Computing Pvt. Ltd. (#110) 29-Aug

71161261-1 10 no.s

ABC Pvt. Ltd. (#107) 31-Aug

2 Burner 10 no.s

A to Z Trading Company (#111) 07-Sep

Ballpen 50 no.s

A to Z Trading Company (#112) 09-Sep

Ballpen 50 no.s

A to Z Trading Company (#117) 09-Sep

Compressor 5 no.s

A to Z Trading Company (#113) 20-Sep

Pls go there on Dt.12Sep21 10 AM ₹ 5,000

Status: In Process

Done

CCTV 10 no.s

AARMEE ENTERPRISES (#108) 23-Sep

Mark Completion

Mark Cancellation

Transform Sales!



✓ Order Status Updates

Empower customers; save time from follow-ups

✓ Timely Delivery

Track sales commitments; deliver orders punctually

Processing of Sales Orders

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Orders

Sales & Services

Orders received from your customers

Pending Processed

+ Delivery + Add

Ballpen Akash Computing Pvt. Ltd. (#110)	125	29-Aug
71161261-1 ABC Pvt. Ltd. (#107)	10 no.s	31-Aug
2 Burner A to Z Trading Company (#111)	10 no.s	07-Sep
Ballpen A to Z Trading Company (#112)	50 no.s	09-Sep
Ballpen A to Z Trading Company (#112)	50 no.s	09-Sep
Compressor A to Z Trading Company (#113) Pls go there on Dt.12Sep2020 10 AM	5 no.s	20-Sep ₹ 5,000
CCTV AARMEE ENTERPRISES (#108)	10 no.s	23-Sep

Edit



Modify

Status: In Process

Transform Sales!



✓ Order Status Updates

Empower customers; save time from follow-ups

✓ Timely Delivery

Track sales commitments; deliver orders punctually

Processing of Sales Orders

Orders

Transform Sales!

Update Order 113 Save ✕

From : A to Z Trading Company Dated : 11-Sep-2021 Ayushi Gandhi

Edit Product / Service

Item : Compressor Qty : 5 no.s @ ₹ 1000 / no.s

Due on : 20-Sep-21 Notes : Pls go there on Dt.12Sep21 10 AM

Change note to A to Z Trading Company

Notes :

Update Customer

Save

Change in Sales Order details

Processing of Sales Orders

- Sales & Services
- Orders received from your customer
- Pending Processed
- Ballpen
Akash Computing Pvt. Ltd. (#110)
- 71161261-1
ABC Pvt. Ltd. (#107)
- 2 Burner
A to Z Trading Company (#111)
- Ballpen
A to Z Trading Company (#112)
- Ballpen
A to Z Trading Company (#112)
- Compressor
A to Z Trading Company (#113)
Pls go there on Dt.12Sep21 10 AM
- CCTV
AARMEE ENTERPRISES (#108)

- 50 no.s
- 09-Sep
- 5 no.s
- 20-Sep
- ₹ 5,000
- 10 no.s
- 23-Sep

Status: In Process

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Orders

Sales & Services

Orders received from your customers

Pending Processed + Delivery + Add

Ballpen Akash Computing Pvt. Ltd. (#110)	125	29-Aug
71161261-1 ABC Pvt. Ltd. (#107)	10 no.s	31-Aug
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Ballpen A to Z Trading Company (#112)	50 no.s	09-Sep
Compressor A to Z Trading Company (#113) Pls go there on Dt.12Sep21 10 AM	5 no.s	20-Sep ₹ 5,000
CCTV AARMEE ENTERPRISES (#108)	10 no.s	23-Sep

Update the Order Status

Status: In Process

Transform Sales!



- ✓ Order Status Updates
Empower customers; save time from follow-ups
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Processing of Sales Orders

Orders

- CRM
 - Leads
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Sales & Services
Orders received from your customer

Pending Processed

Ballpen
Akash Computing Pvt. Ltd. (#111)

A to Z Trading Company (#111)

Ballpen
A to Z Trading Company (#112)

Ballpen
A to Z Trading Company (#112)

Compressor
A to Z Trading Company (#113)
Pls go there on DL12Sep21 10 AM

Status: In Process

CCTV
AARMEE ENTERPRISES (#108)

Status Update

A to Z Trading Company
Compressor

Due on: 20-Sep Qty: 5 no.s Total: ₹ 5,000 Order No: 113 Executive: Ayushi Gandhi

Current Status : In Process + Add Note

(Suggested : WIP, Query, Packed, Cancelled, Done)

Update Customer : By Email By WhatsApp

✓ Update Status

Progress Update

Intimation to Customer

Comments

Processing of Sales Orders

Transform Sales!



Order Status Updates
Track sales commitments; deliver orders punctually

CRM

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Orders

Sales & Services

Orders received from your customers

Pending
Processed
😊
🔄
+ Delivery
+ Add

Ballpen Akash Computing Pvt. Ltd. (#110)	125	29-Aug
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Ballpen A to Z Trading Company (#112)	50 no.s	09-Sep
Compressor A to Z Trading Company (#113) Pls go there on Dt.12Sep21 10 AM	5 no.s	20-Sep
	₹ 5,000	
✓ ✗ ✎ 🔄 Status: Packed		
CCTV AARMEE ENTERPRISES (#108)	10 no.s	23-Sep

Updated Status of the Sales Order

Transform Sales!



- ✓ **Order Status Updates**
 Empower customers; save time from follow-ups
- ✓ **Timely Delivery**
 Track sales commitments; deliver orders punctually

Processing of Sales Orders

Orders

CRM

- Leads
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ERP

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Sales & Services

Orders received from your customers

Pending Processed

Ballpen
Akash Computing Pvt. Ltd. (#111)

71161261-1
ABC Pvt. Ltd. (#107)

2 Burner
A to Z Trading Company (#111)

Ballpen
A to Z Trading Company (#112)

Ballpen
A to Z Trading Company (#112)

Compressor
A to Z Trading Company (#113)
Pls go there on DL12Sep21 10 AM
₹ 5,000

CCTV
AARMEE ENTERPRISES (#108)
10 no.s
23-Sep

Status Update

A to Z Trading Company
Compressor

Due on: 20-Sep Qty: 5 no.s Total: ₹ 5,000 Order No: 113 Executive: Ayushi Gandhi

Current Status : In Process + Add Note

(Suggested : WIP, Query, Packed, Cancelled, Done)

Update Customer : By Email By WhatsApp

✓ Update Status

Click on "Done"

Click on "Done"

Closing the Sales Order

Transform Sales!



Order Status Updates

customers; save time from follow-ups

Delivery

commitments; deliver orders punctually

Orders

Sales & Services

Orders received from your customers

Pending

Processed

Ballpen

Akash Computing Pvt. Ltd. (#111)

71161261-1

ABC Pvt. Ltd. (#107)

2 Burner

A to Z Trading Company (#111)

Ballpen

A to Z Trading Company (#112)

Ballpen

A to Z Trading Company (#112)

Compressor

A to Z Trading Company (#113)

Pls go there on DL 12Sep21 10 AM



Status: Packed

CCTV

AARMEE ENTERPRISES (#108)

Order Completion

A to Z Trading Company

Compressor

Due on: 20-Sep

Qty: 5 no.s

Total: ₹ 5,000

Order No: 113

Executive: Ayushi Gandhi

Delivery Details :

Done by Dt. 11Sep21

+ Add Note

Update Recovery Amt :

₹ 0

(Add ₹ 0)

Upload Invoice

Update Customer :

By Email

By WhatsApp

Mark as Done

Add notes if any

Closing the Sales Order

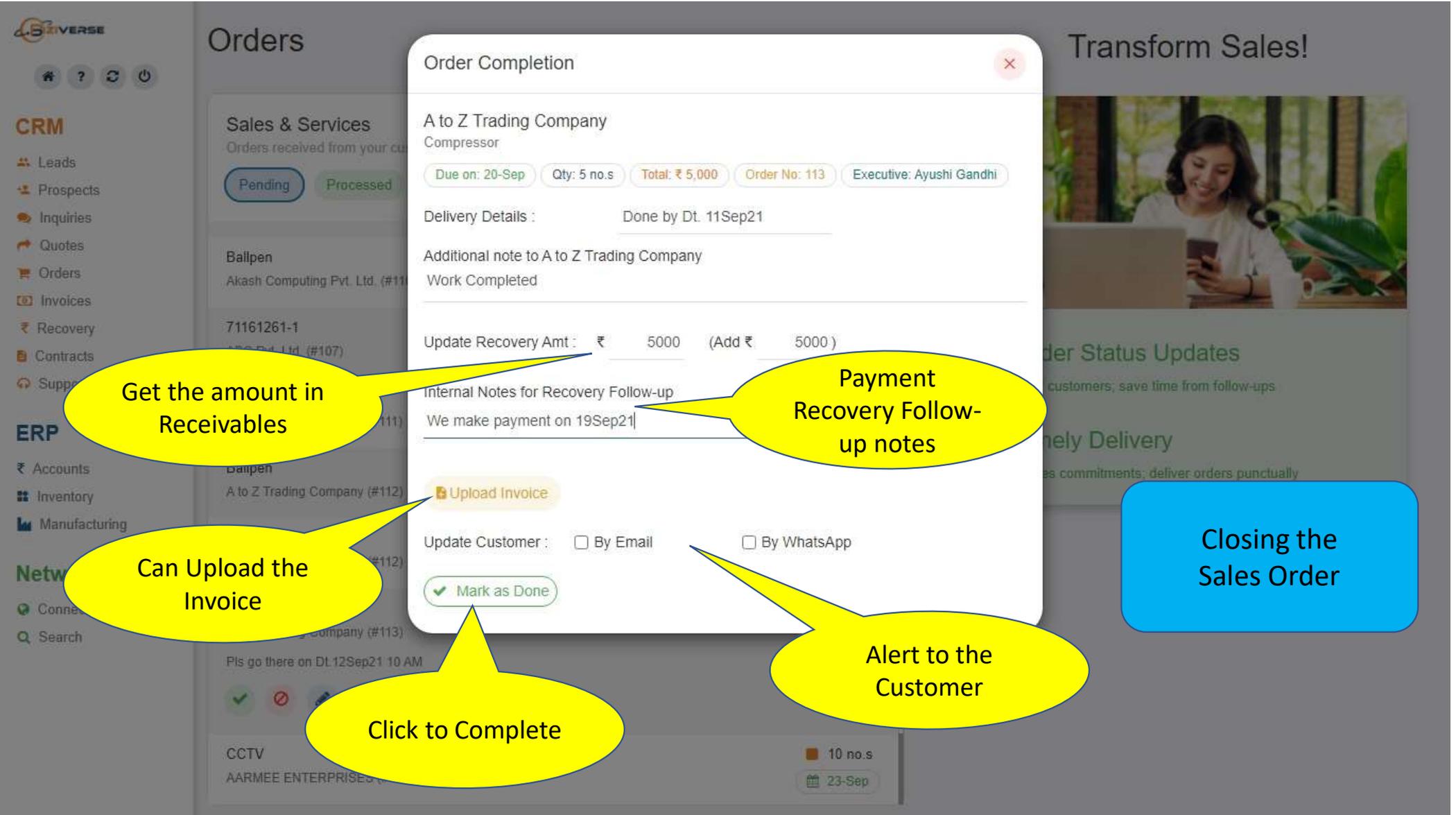
Transform Sales!



Updates

follow-ups

Track sales commitments; deliver orders punctually



Orders

Sales & Services

Orders received from your customers

Pending Processed

Ballpen
Akash Computing Pvt. Ltd. (#111)

71161261-1
A to Z Trading Company (#107)

Ballpen
A to Z Trading Company (#112)

Ballpen
A to Z Trading Company (#112)

Ballpen
A to Z Trading Company (#113)

CCTV
AARMEE ENTERPRISES

Order Completion

A to Z Trading Company
Compressor

Due on: 20-Sep Qty: 5 no.s Total: ₹ 5,000 Order No: 113 Executive: Ayushi Gandhi

Delivery Details : Done by Dt. 11Sep21

Additional note to A to Z Trading Company
Work Completed

Update Recovery Amt : ₹ 5000 (Add ₹ 5000)

Internal Notes for Recovery Follow-up
We make payment on 19Sep21

Upload Invoice

Update Customer : By Email By WhatsApp

Mark as Done

Transform Sales!



Order Status Updates

customers; save time from follow-ups

Timely Delivery

customers commitments; deliver orders punctually

Get the amount in Receivables

Can Upload the Invoice

Click to Complete

Payment Recovery Follow-up notes

Alert to the Customer

Closing the Sales Order

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Orders

Sales & Services

Orders received from your customers

Pending **Processed** Month : Sep 2021

+ Delivery + Add

Compressor

A to Z Trading Company (#113)

5 no.s

11-Sep

Sales Order shown as "Processed"

Transform Sales!



✓ Order Status Updates

Empower customers; save time from follow-ups

✓ Timely Delivery

Track sales commitments; deliver orders punctually

Processing of Sales Orders

Recovery

Total Receivables : ₹ 30,378

Search

Show only non-zero

[+ Enter Customer](#)

Company	Contact	Amount	Connect	Reminder	Internal Notes	
<input type="checkbox"/> A to Z Trading Company	Nisharg Mishra	5,000		-	We make payment on 19Sep21	Remind Receive
<input type="checkbox"/> Suhas International	Suhas Patel	5,000		Today	He will make payment on 17Sep21	Remind Receive
<input type="checkbox"/> Zyz	G J	5,000		-	-	Remind Receive
<input type="checkbox"/> Most Marketing	Botcha Bhavani	4,000		21-Aug	Next follow up 30Aug	Remind Receive
<input type="checkbox"/> Dev Graphics & Gifts	Dev Panchal	2,500		10-Aug	Advance Payment	Remind Receive
<input type="checkbox"/> Greens	Ankit Sutariya	2,500		30-Aug	-	Remind Receive
<input type="checkbox"/> [Company Name]	Harsh Jadav	2,000		30-Jul	Call & Follow Up for payment	Remind Receive
<input type="checkbox"/> [Company Name]	Bhavesh L	2,000		02-Aug	Pls Pay	Remind Receive
<input type="checkbox"/> [Company Name]	Harsh Jadav	1,000		14-Aug	Call & Recived Payment	Remind Receive
<input type="checkbox"/> AB software	AB Solution	500		Today	Receive	Remind Receive

Click on "Recovery" to see Receivables

Payment Recovery

6 7 8 »

Recovery

Total Receivables : ₹ 30,378

Show only non-zero [+ Enter Customer](#)

Sales to Receivables

CRM

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- Invoices
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Company	Contact	Amount	Connect	Reminder	Internal Notes		
<input type="checkbox"/> A to Z Trading Company	Nisharg Mishra	5000		+ Set	We make payment on 19Sep21		Remind Receive
Suhas International	Suhas Patel	5,000		Today	He will make payment on 17Sep21		Remind Receive
<input type="checkbox"/> Zyz	G J	5,000		-	-		Remind Receive
<input type="checkbox"/> Most Marketing	Botcha Bhavani	4,000		21-Aug	Next follow up 30Aug		Remind Receive
<input type="checkbox"/> Dev Graphics & Gifts	Dev Panchal	2,500		10-Aug	Advance Payment		Remind Receive
<input type="checkbox"/> Greens	Ankit Sutariya	2,500		30-Aug	-		Remind Receive
<input type="checkbox"/> Harsh Enterprise	Harsh Jadav	2,000		30-Jul	Call & Follow Up for payment		Remind Receive
<input type="checkbox"/> Sanco	Bhavesh L	2,000		02-Aug	Pls Pay		Remind Receive
<input type="checkbox"/> Harsh Industry	Harsh Jadav	1,000		14-Aug	Call & Recived Payment		Remind Receive
AB software	AB Solution	500		Today	Receive		Remind Receive

Payment Recovery