



# End-to-End Solution

*CRM & DEV Product*

A monday.com Solution to handle all company processes, enhancing the monday.com CRM, creating custom Sales Orders, and connecting it to the Dev Product, while also handling Invoice and Payment Tracking.

# What is included in E2E?

- ➔ Leads and Opportunities Management
- ➔ Contacts and Companies Management
- ➔ Custom Sales Orders Creation
- ➔ Automatic Sales Orders Document Creation
- ➔ Pricing Table Feature
- ➔ Automatic Sprints Creation
- ➔ High Level and Big Projects Management
- ➔ Invoices Handling
- ➔ Payments Tracking
- ➔ Real Time Sales Dashboards

# Why choose E2E?

- ➔ It is an excellent choice for your business as it provides a **complete solution to manage sales and project management** workflows effectively.
- ➔ It **solves communication problems** between Sales and Technical teams, bridging the gap and ensuring that both **teams are on the same page**. Technical teams, whether they are developers, installation teams, or work using Production Calendars, can all benefit from the solution's capabilities.



# Why choose E2E?

## Effective Management



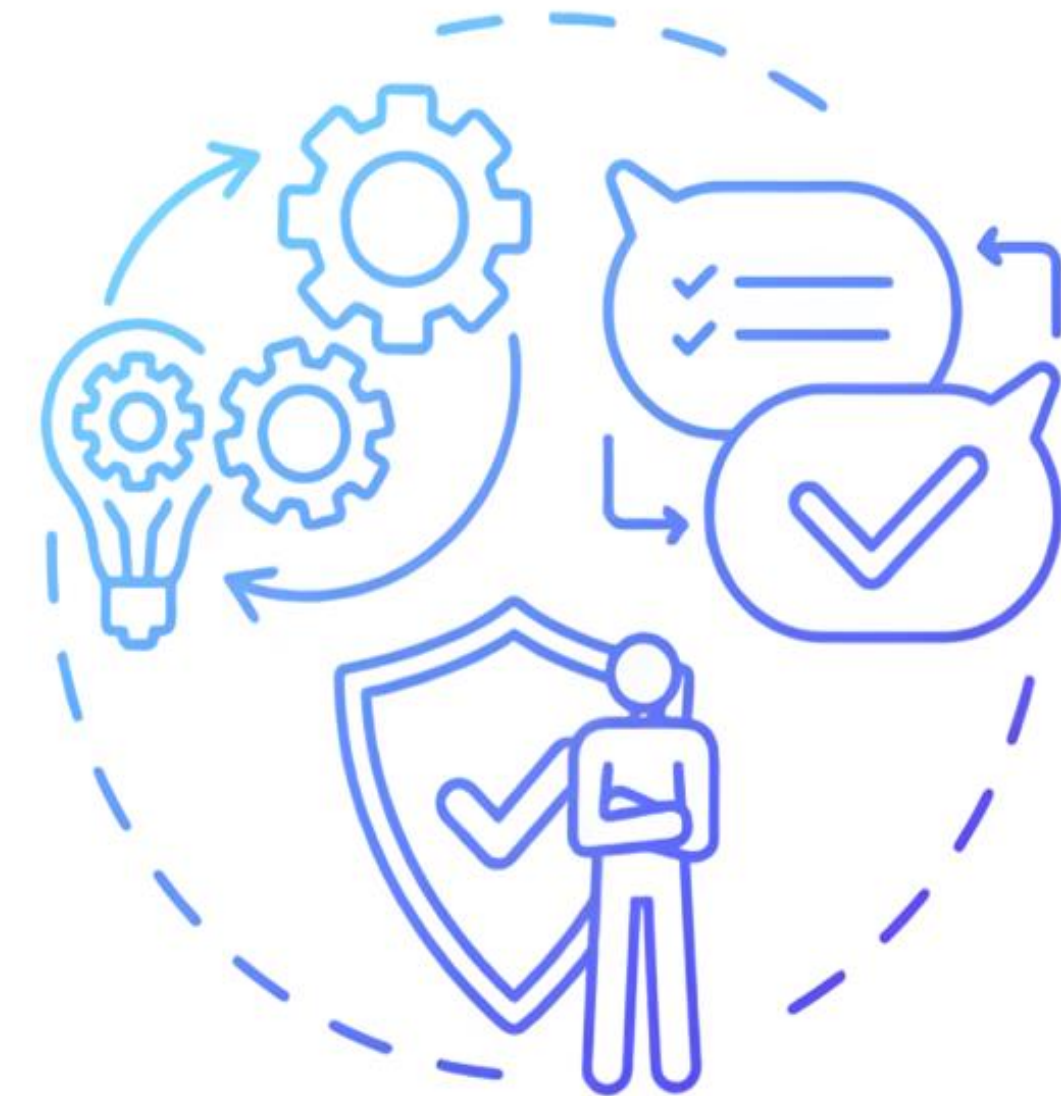
➔It offers **both a CRM and optionally a Dev solution**, which can work separate from or **enhance monday's respective products**, allowing your business to manage customer relationships and development processes in a single integrated platform.

➔The emphasis on **Sales Orders (SO) and SO approval** ensures that your business can **streamline sales processes and quickly approve and keep track of orders and discounts**, reducing turnaround times and improving customer satisfaction, while the pricing table helps **optimize your pricing strategies and maximize profitability**.

# Why choose E2E?

➔ The **sprint management and high-level project management** boards enable your business to break down complex projects into smaller, more manageable segments, **prioritize tasks, and collaborate effectively.**

➔ The **role differentiation** between Scrum Master, Account Manager, and Account Executive, and where they work, **is clear** and it helps businesses to **optimize team workflows and improve productivity.**



**Accountability**

This solution is an **invaluable tool** for any organization looking to **drive growth and achieve success.**

**Leads**

Main | Main Table | Dashboard | Form | +

New Lead | Search | Person | Filter | Sort | Hide / 3 | Group by

**New Leads**

Lead	Request Date	Lead Priority	Contacts	Company	Indication	Status	Phone	Email	Title
Giannis Vlach		Low Priority	-	-	New Account	Lead	+1 956 456 3245		
Pavlos Vartis		Low Priority	-	-	New		0970 1841	pavlos@thespelas...	CEO
Eric White		Low Priority	-	-	New		890 4678		
Giorgos Lytras		Low Priority	-	Darci	Existi		0987 9034	lytras@darci	CIO
Karen Piltou		Low Priority	-	-	New		01 994333		

**Qualified Leads**

Lead	Request Date	Lead Priority	Contacts	Company	In	Status	Phone	Email	Title
Jessica Her		Low Priority	Jessica Her	BRE	Qualified (Existing Account)	Qualified (Existing Acco...		jess@main.com	
George Papadopoulos		Low Priority	George Papado...	BBCBB		Qualified (Existing Acco...	+1 765 437 8545	ex5@hotmail.com	
Paul Bary		Low Priority	Paul Bary	thespelas.com		Qualified (New Account)	+30 21 2252 5256	pavlos@the	
Zacharias Stavropoulos		Low Priority	Zacharias Stavr...	thespelas.com		Qualified (New Account)	+30 21 2252 5256	zacharias@	
Jean Sean		High Priority	Jean Sean	OPAP		Qualified (New Account)	+1 956 453 9870	ex3@hotm	
Maria Carrey		High Priority	Maria Carrey	Superdry		Qualified (Existing Acco...	+1 956 453 9871	ex4@hotm	
Stavropoulos Zach		Low Priority	-	thespelas.com		Qualified (New Account)	+30 21 0983 5026	zacha@the	
Zach Stavr		Low Priority	-	thespelas.com		Qualified (New Account)	+30 21 0983 7318	zach@thes	

# Leads Management

Manage your leads with features such as **lead duplication detection**, **lead prioritization**, **automatic creation of new customers and contacts in prospect boards**, and **automatic connection for existing ones**.

# Opportunities Management

Optimize your Opportunities Management with capabilities such as **real-time close probability**, **forecasted value and deal stage tracking**. Start converting your opportunities into Sales Orders here.

**Opportunities**

Main | Main Table | Deal Status | Kanban | Opps-SOs-Projects... | +

New Opportunity | Search | Person | Filter | Sort | Hide / 1 | Group by

**Working Pipeline**

Opportunity	Owner	Stage	Priority	Request	Sales Order	Sales Order S...	Total Amount
Jean Sean - OPAP		Create SO	Medium		Jean Sean - OPA...	SO Created	36,368.5
Maria Carrey - Superdry Opportu...		Create SO		New Tour Campaign Posters	Maria Carrey - Su...	Working on it	
Test lead - thespelas.com				Test req	Test lead - thespe...	New Offer Request	
Test lead two - thespelas.com				Test request two	Test lead two - th...	New Offer Request	
Stavropoulos Zacharias - Ok Mark...				Test for OK	Stavropoulos Zac...	New Offer Request	
Another test - TestComp				Another test	Another test - Te...	New Offer Request	
Test - testCompany				Test value	Test - testCompa...	New Offer Request	

**Closed Won**

Opportunity	Owner	Stage	Priority	Request	Sales Order	Sales Order S...	Total Amount
Jessica Her - Opportunity		Won	Done Deal	Wallcovering designs	Jessica Her - Op...	Accepted SO	26,440
George Papadopoulos - BBCBB O...		Won	Done Deal	New Brand Decoration Log...	George Papadop...	Accepted SO	20,829.5
New Opportunity (created by Pho...		Won	Done Deal	Renovation of 3 Stores	New Opportunity...	Accepted SO	41,820
Paul Bary - thespelas.com		Won	Done Deal	Pilot project for 1 Store in ...	Paul Bary - thesp...	Accepted SO	26,220

**Contacts** ⓘ ☆

Main | Main Table | Contacts Dashboard | +

New Contact ▾ Search Person Filter / 1 ▾ Sort Hide / 2 Group by ...

▼ **Contacts**

Contact	Salesperson	Customers	Type	Industry	Primary Phone	Ext
Charlotte Billy	[Avatar]	Darci	Customer	Food	+1 404 543 6144	
Sabra Tiner	[Avatar]	Dart, Inc	Customer	Facility Manager	+1 404 543 6144	
John Chambers	[Avatar]	Yo Darley	Vendor	Art Materials	+1 404 343 0144	
Francis Monroe	[Avatar]	Cannon	Customer	Food	+1 404 543 6132	
Diana Tomas	[Avatar]	Investima	Customer	Security	+1 404 343 0144	
Jeff Sturgito	[Avatar]	Admiral	Customer	Clothing	+1 404 543 6132	
Jennifer Wol	[Avatar]	BRET, Inc.	Customer	Facility Manager	+1 404 543 6132	
Jessica Her	[Avatar]	BRET, Inc.	Customer	Facility Manager	+1 404 343 0144	
Chris Kopczynski	[Avatar]	Built TR	Customer	Consulting	+1 404 543 6144	
Leen Jones	[Avatar]	xtreme Fabrication LL	Vendor	Art Materials	+1 404 343 0	
Ben Keller	[Avatar]	KM Exteriors	Customer	IT	+1 404 343 0	
David Lasker	[Avatar]	Sword & Shield	Customer	Furniture	+1 404 543 6	
Kendra Cashity	[Avatar]	Sklavenitis	Customer	Technology	+1 404 543 6	
Steve LaMarshar	[Avatar]	MacSean-Dibbins Inc	Vendor	Art Materials	+1 404 343 0	
Kalatr Hagop	[Avatar]	Angol TC	Customer	Consulting	+1 404 543 6	
Chad O'Lebo	[Avatar]	Michael Strong		Art Materials, Bottlin...	+1 404 343 0	
Joey Mills	[Avatar]	BRET, Inc.	Customer	Facility Manager	+1 404 543 6	

## Contacts Management

Efficiently oversee all your contacts with ease.

## Customers, Vendors, Partners Management

View all pertinent stakeholders, connected to various types of contacts, and linked to all their corresponding invoices.

**Customers** ⓘ ☆

Main | Main Table | Customers Dashbo... | Customers | Vendors | +

New Account ▾ Search Person Filter ▾ Sort Hide / 4 Group by ...

▼ **Customers**

Account	Sales Representative	Primary Contact	AP Contact	Contacts	Type	Priority	Industry
Darci	[Avatar]	Charlotte Billy	-	Charlotte Billy	Customer	Not Set	Food
BRET, Inc.	[Avatar]	Jessica Her	Jennifer Wol	Jessica Her +2	Customer	High	Facility Manager
Mouser Elevators	[Avatar]	Stephen Sun	-	Stephen Sun	Customer	Not Set	Manufacturer
BBCBB	[Avatar]	John Chambers	Grace Rammond	Nicho Nor... +2	Customer	Not Set	Bottling Company
KM Exteriors	[Avatar]	Jillian Carter	Scott Ridey	Jillian Carr... +1	Customer	Not Set	IT
PathPro Industries	[Avatar]	Anne Hathaway	-	Anne Hathaway	Customer	Not Set	Technology
Admiral	[Avatar]	Jeff Sturgito	Steve LaMarshar	David Man... +1	Customer	Not Set	Clothing
Investima	[Avatar]	Diana Tomas	-	Diana Tomas	Customer	Not Set	Security
Built TR	[Avatar]	Rebecca S Johans	kelly Roosevelt	Chris Kopc... +1	Customer	Not Set	Consulting
Angol TC	[Avatar]	-	-	Kalatr Hagop	Customer	Not Set	Consulting
Sklavenitis	[Avatar]	-	-	Kendra Cashity	Customer	Not Set	Technology
Apple	[Avatar]	-	-	Sarah Houter	Customer	Not Set	Food
Book Repository	[Avatar]	-	-	Pace Chamb	Customer	Not Set	Clothing
Athens PL	[Avatar]	-	-	Tracy Fry	Customer	Not Set	Technology
Dart, Inc	[Avatar]	-	-	Sabra Tiner	Customer	Not Set	Facility Manager
Cannon	[Avatar]	-	-	Francis Monroe	Customer	Not Set	Food
Sword & Shield	[Avatar]	-	-	David Lasker	Customer	Not Set	Furniture

**Sales Orders** | Main View | Main Table | Accounting | + | Board Power-Ups

New Item | Search | Person | Filter | Sort | Hide / 1

**Working Sales Orders**

Item	Account Manager	Acceptance Status	SO Approver	SO Approval	Creation Date	Total
▼ Jean Sean - OPAP - SO 5		SO Created		Ready for Approval	Nov 4, 20...	34,4

Subitem	Description	Pricing Table	Suggested Unit ...	UOM	Quantity
ART Work	Art creation	Art	\$11,100	Each	2
Printing	Print Artwork	Plotting	\$450	Each	2
Frames	Frames	Misc	\$120	Each	2
Installation	Install the Frames		\$4,500	Each	2
Project Management	Project Management		\$200	Hr	10
+ Add subitem					

+ Add Item

**Accepted Sales Orders**

Item	Account Manager	SO Approver	SO Approval	Creation Date	Total

Working on it

SO Created

SO Created/Approv...

Accepted SO

Rejected SO

New Offer Request

Edit Labels

## Sales Orders Management

Tailor your Sales Order Management to meet your specific needs. Track suggested and actual prices, tax totals and rates, due dates, and much more with ease. Ensure optimal operational efficiency and profitability with meticulous documentation, streamlined approval processes, and effective price management. C-level executives can finally know what is being sold and approve pricing and discounts.



THANOS SPELAS E.E.  
Rostan 44, Patisia, 111 41  
[sales@thespelas.com](mailto:sales@thespelas.com)  
210 8086636



## Sales Order # 54

Jean Sean - OPAP - SO

SALES ORDER DATE    DUE DATE

TERMS  
Net 30

ORDERED BY  
OPAP  
Atlanta, GA 30302  
, GA,

SHIPPING ADDRESS  
Atlanta, GA 30302 ,  
GA,

CONTACT INFO  
Jean Sean  
ex3@hotmail.com  
19564539870

## Sales Orders Document

Eliminate the hassle of manual Sales Order Document creation with E2E. Save time and effort by generating these documents automatically with just a single click.

#	ITEM	QTY	UOM	U.PRICE	TOTAL (NO TAX)	TAXABLE
1	ART Work	2	Each	\$11,100.00	\$22,200.00	Y
2	Printing	2	Each	\$450.00	\$900.00	Y
3	Frames	2	Each	\$150.00	\$300.00	Y
4	Installation	2	Each	\$4,500.00	\$9,000.00	N
5	Project Management	10	Hr	\$200.00	\$2,000.00	Y

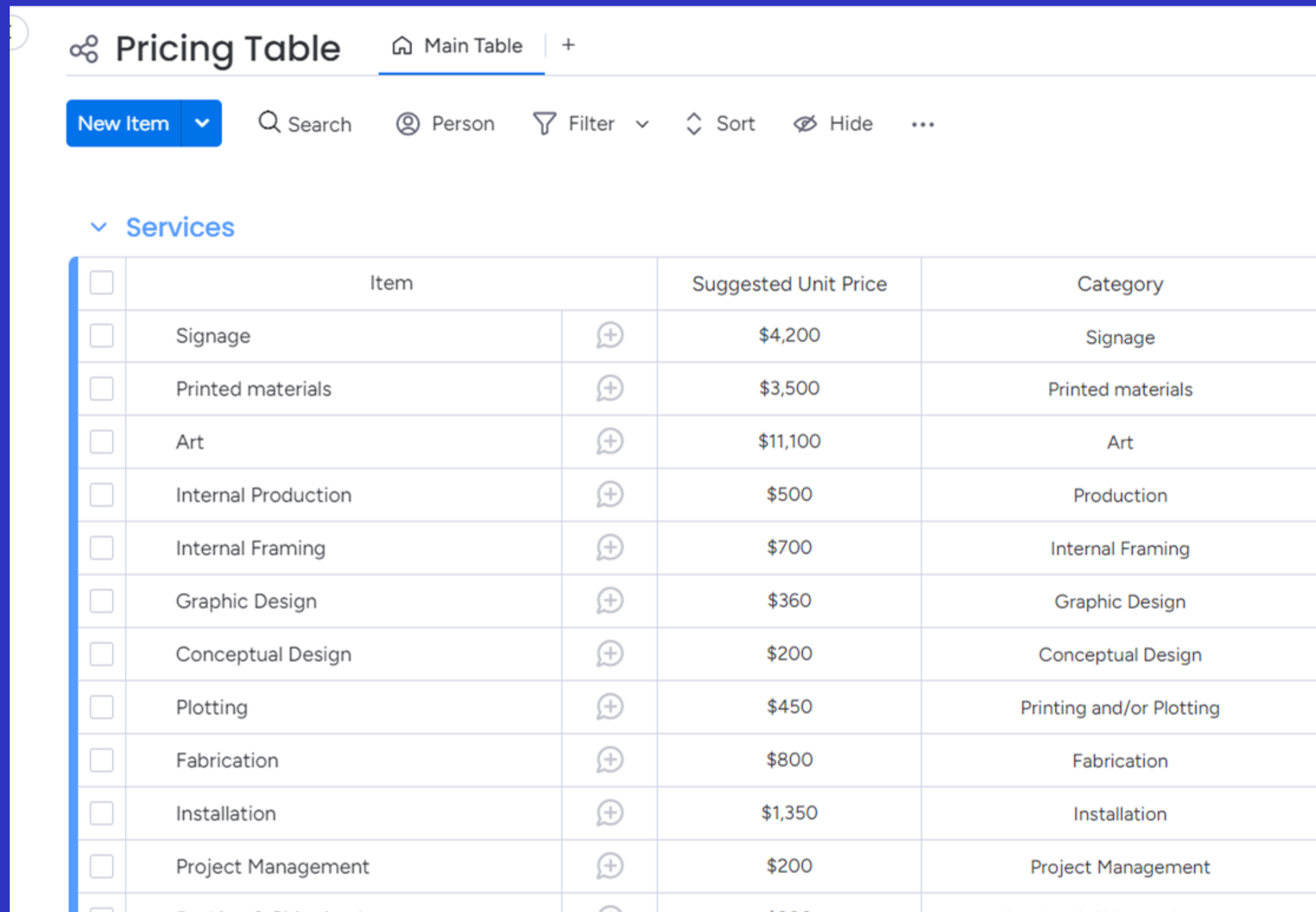
Subtotal: \$34,400.00  
Sales Tax (7.75%): \$1,968.50  
Total: \$36,368.50

SIGNATURE:

DATE:

## Pricing Table

Provides a **clear and consistent pricing structure** and simplifies the sales process for your business.



The screenshot displays the 'Pricing Table' interface. At the top, there is a navigation bar with 'Main Table' selected. Below this is a toolbar with options: 'New Item', 'Search', 'Person', 'Filter', 'Sort', 'Hide', and a menu icon. A 'Services' dropdown is visible, and the main table lists various services with their respective prices and categories.

<input type="checkbox"/>	Item		Suggested Unit Price	Category
<input type="checkbox"/>	Signage		\$4,200	Signage
<input type="checkbox"/>	Printed materials		\$3,500	Printed materials
<input type="checkbox"/>	Art		\$11,100	Art
<input type="checkbox"/>	Internal Production		\$500	Production
<input type="checkbox"/>	Internal Framing		\$700	Internal Framing
<input type="checkbox"/>	Graphic Design		\$360	Graphic Design
<input type="checkbox"/>	Conceptual Design		\$200	Conceptual Design
<input type="checkbox"/>	Plotting		\$450	Printing and/or Plotting
<input type="checkbox"/>	Fabrication		\$800	Fabrication
<input type="checkbox"/>	Installation		\$1,350	Installation
<input type="checkbox"/>	Project Management		\$200	Project Management

## Why it is useful

E2E's Pricing Table allows your business to provide c-level executives with a **comprehensive overview** of what is being sold, how it is being sold, and at what price, while also ensuring that **all sales are connected with proper approval to effectively manage overhead costs.**

By **providing accountability and clarity** throughout the Sales Orders process, your business is empowered to **make informed decisions on actual selling prices**, optimizing the process and **enhancing overall profitability.**

To add, it is also used to create **most informative Cost Dashboards.**

**Sprints** | Main Table | Current Sprint Dead... | Next Sprint Deadlin... | +

Integrate | Automate / 1

New Task | Search | Person | Filter | Sort | Hide | Group by

Current Sprint - 6-17/02/2023

Task	Owner	Project No	Status	Type	Priority	Allocation Timeline	Deadline	Estimated Effort (...)
Artwork Framing	[Avatar]	PRJ-001	Done	Production	High	Feb 1 - 7	Feb 10	20 Hour
Art Creation	[Avatar]	PRJ-001	Working on it	Production	High	Feb 1 - 10	Feb 13	30 Hour
Project management	[Avatar]	PRJ-001	Working on it	Project Managem...	Normal	Feb 1 - 28	Mar 1	20 Hour
							Feb 1 - 28	70 Hour sum

Next Sprint

Task	Owner	Project No	Status	Type	Priority	Allocation Timeline	Deadline	Estimated Effort (...)
Installation	[Avatar]				Low		Mar 1	12 Hour
Art Creation	[Avatar]				Low		Feb 17	20 Hour
New Logos Printing	[Avatar]				High		Feb 17	10 Hour
Logo Frames	[Avatar]				High		Feb 20	15 Hour

Backlog

Task	Owner	Project No	Status	Type	Priority	Allocation Timeline
Installation	[Avatar]	PRJ-003	Ready to Start!	Delivery/Installati...	Normal	

## Sprint Management

When an SO is accepted, have the option to automatically create tasks for every action that must be realized. Organize and manage your projects by breaking them down into simple tasks, allowing you to prioritize certain items, collaborate effectively, and make iterative improvements to your work.

## Projects Management

Monitor progress and identify potential issues, facilitating timely intervention and corrective action. High level view connected to Sales Orders, Opportunities, Invoices and Sprint Tasks.

**All Projects** | Main Table | Dashboard | Calendar | +

Integrate | Automate / 2

New Item | Search | Person | Filter | Sort | Hide | Group by

Incoming Projects

Item	Project No.	PM	Status	Sprints	Sprints Status	Est. Effort	Log. Effort	Timeline	Opportunit...
George Papadopoulos - BBCBB Oppor...	PRJ-003	[Avatar]	Ready to Start	New Logo... +2		35 Hour	0h 0m		George Papado...
New Opportunity (created by Phone r...	PRJ-005	[Avatar]	Ready to Start	Installation... +5		96 Hour	0h 0m		New Opportuni...
Paul Bary - thespelas.com - SO	PRJ-006	[Avatar]	Ready to Start	Ground FL... +4		110 Hour	0h 0m		Paul Bary - the...

Running Projects

Item	Project No.	PM	Status	Sprints	Sprints Status	Est. Effort	Log. Effort	Timeline	Opportunit...
Jessica Her - Opportunity - SO	PRJ-001	[Avatar]	Working on it	Artwork Fr... +4		102 Hour	18h 0m	Feb 1 - 28	Jessica Her - O...

Completed Projects

Item	Project No.	PM	Status	Sprints	Sprints Status	Est. Effort	Log. Effort	Timeline	Opportunit...
+ Add Item									

# Big Project Shared - example







Last seen  Invite / 4 Board Power-Ups

Table | Main Table | Gantt | +

Integrate Automate

New Item Search Person Filter Sort Hide Group by

## The Project

Item	Owner	Status	Dependent On	Timeline	Expected Close Date
Artwork		Done	-	Nov 1, '22 - Nov 30, '22	19 Nov, 2022
1st Milestone		Done	Artwork	Nov 19, '22	19 Nov, 2022
Project Mngmnt		Working on it	1st Milestone	Nov 19, '22 - Dec 8, '22	8 Dec, 2022
2nd Milestone		Yet to Start	Project Mngmnt	Dec 8, '22	8 Dec, 2022
Delivery-Installation		Yet to Start	2nd Milestone	Dec 8, '22 - Dec 23, '22	23 Dec, 2022
End of Project		Yet to Start	Delivery-Installa...	Dec 23, '22	23 Dec, 2022
+ Add Item					

## & Big Projects!

Even if your business is tackling a large-scale project, E2E's customizable existing template enables you to stay on track and **ensure timely completion**, without compromising on quality or efficiency.

### Invoices

Accounting | +

Integrate Automate / 3

New Item Search Person Filter Sort Hide / 11 Group by

#### Pending Invoices

Item	#Invoice No.	Invoice Status	Invoice Type	Invoice Issue Date	Invoice amount	Total Payments	Amount Due	Total AMNT from S.O.
Invoice - Project PRJ-006	INV-00005	Working on it	No Value	Feb 1			0	26,220
Invoice - Project PRJ-005	INV-00004	Partial Payment	Outgoing	Feb 8	21,820	\$10,000	11,820	41,820
Invoice - Project PRJ-003	INV-00012	Partial Payment	Outgoing	Feb 2	6,943		6,943	20,829.5
+ Add Item								
					28,763 sum		18,763 sum	

#### Paid Invoices

Item	#Invoice No.	Invoice Status	Invoice Type	Invoice Issue Date	Invoice amount	Total Payments	Amount Due	Total AMNT from S.O.
Invoice - Project PRJ-001	INV-00001	Paid	Outgoing	Jan 31	20,000	\$20,000	0	26,440
Invoice - Project PRJ-001	INV-00002	Paid	Outgoing	Feb 1	6,440	\$6,440	0	26,440
Invoice - Project PRJ-003	INV-00003	Paid	Outgoing	Feb 1	6,943	\$6,943	0	20,829.5
Invoice - Project PRJ-005	INV-00015	Paid	Outgoing	Feb 2	20,000			
+ Add Item								
					53,383 sum			

# Invoice Management

Get a complete overview of your invoices, including corresponding Projects and Sales orders, payment amounts and dates, and outstanding balances, providing you with all the necessary information for effective financial management.

# Payments Management

Easily monitor project and invoice payments, including amounts paid and outstanding balances, as well as the associated payment methods, providing you with excellent financial tracking capabilities.

### Payments

Main Table | +

New Item Search Person Filter Sort Hide Group by

#### Pending

Item	Status	Type	Payment Method	Expected Payment Da...	Actual Payment Date	Payment Am...	Total Invoiced L...	Unresolved Amr
+ Add Item								
						0 sum		sum

#### Paid

Item	Status	Type	Payment Method	Expected Payment Da...	Actual Payment Date	Payment Am...	Total Invoiced L...	Unresolved Amr
Payment for Project PRJ-001	Paid	Partial	Check	Feb 3	Feb 1	26,440	\$26,440	0
+ Add Subitem								
Subitem	Type	Payment amnt	Date	Invoices	Invoice Amnt	Invoice No.	Files	+
Payment for INV-00001	Partial	\$20,000	Feb 1	Invoice - Projec...	20,000	INV-00001		
Payment for INV-00002	Partial	\$6,440	Feb 2	Invoice - Projec...	6,440	INV-00002		
+ Add Subitem								
> 1st Payment for Project PRJ-003	Paid	Partial	Wire Transfer	Feb 3	Feb 4	20,000	\$6,943	13,057
> Payment for Project PRJ-005	Paid	Partial	Master Card			30,000	\$30,000	0
						76,440 sum		13,057 sum

# Sales Dashboard

Forecasted Revenue

\$80,000

Actual Revenue

\$80,000

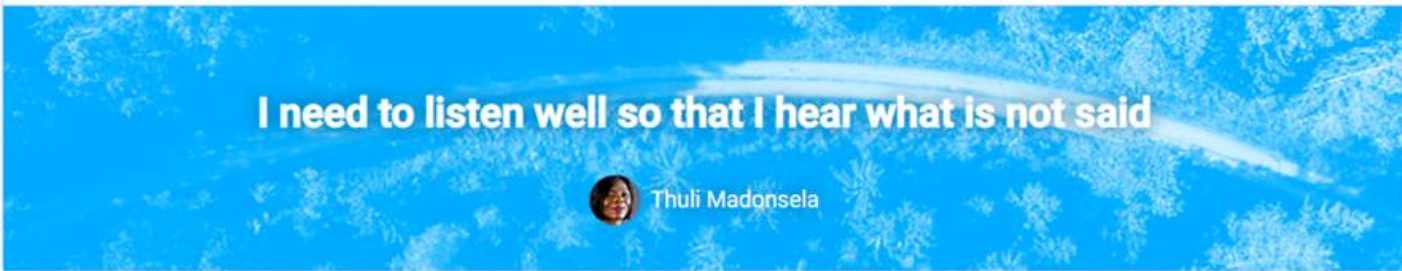
## Sales Metrics

Sales Order Conversion



- New Offer Req.: 41.7%
- Accepted SO: 33.3%
- Working on it: 8.3%
- Rejected SO: 8.3%
- SO Created: 8.3%

Quote of the Day



Close Rate



- Create SO: 58.3%
- Won: 33.3%
- Lost: 8.3%

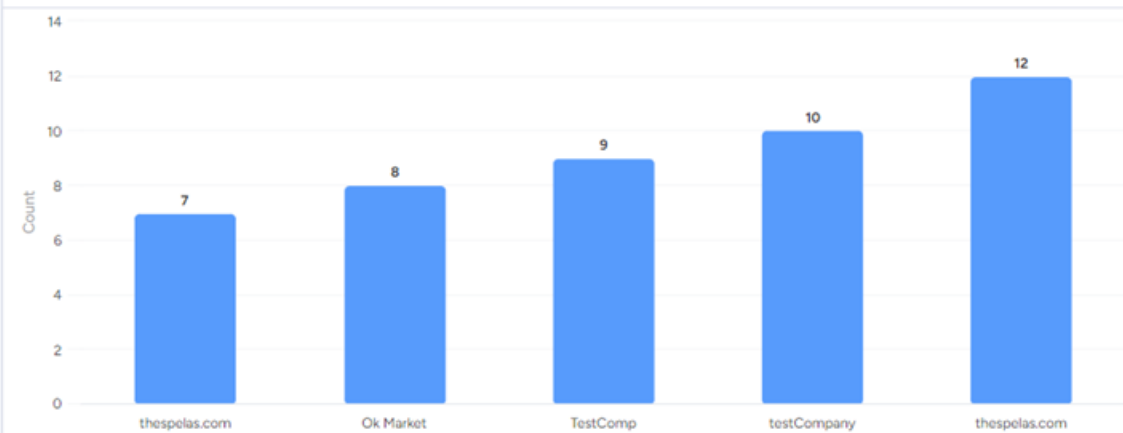
Avg Services per Order

3.5

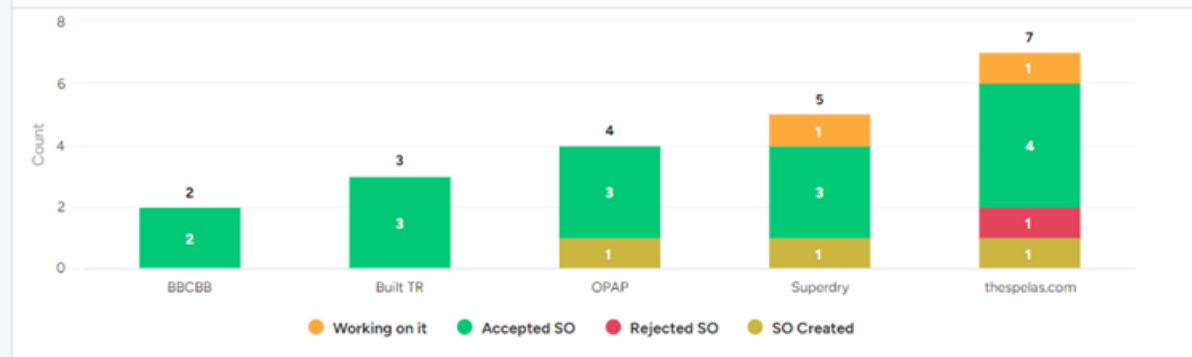
Avg tax

4.388%

Opps By Company



SO stage by Company



SOs progress by month



SOs progress by month

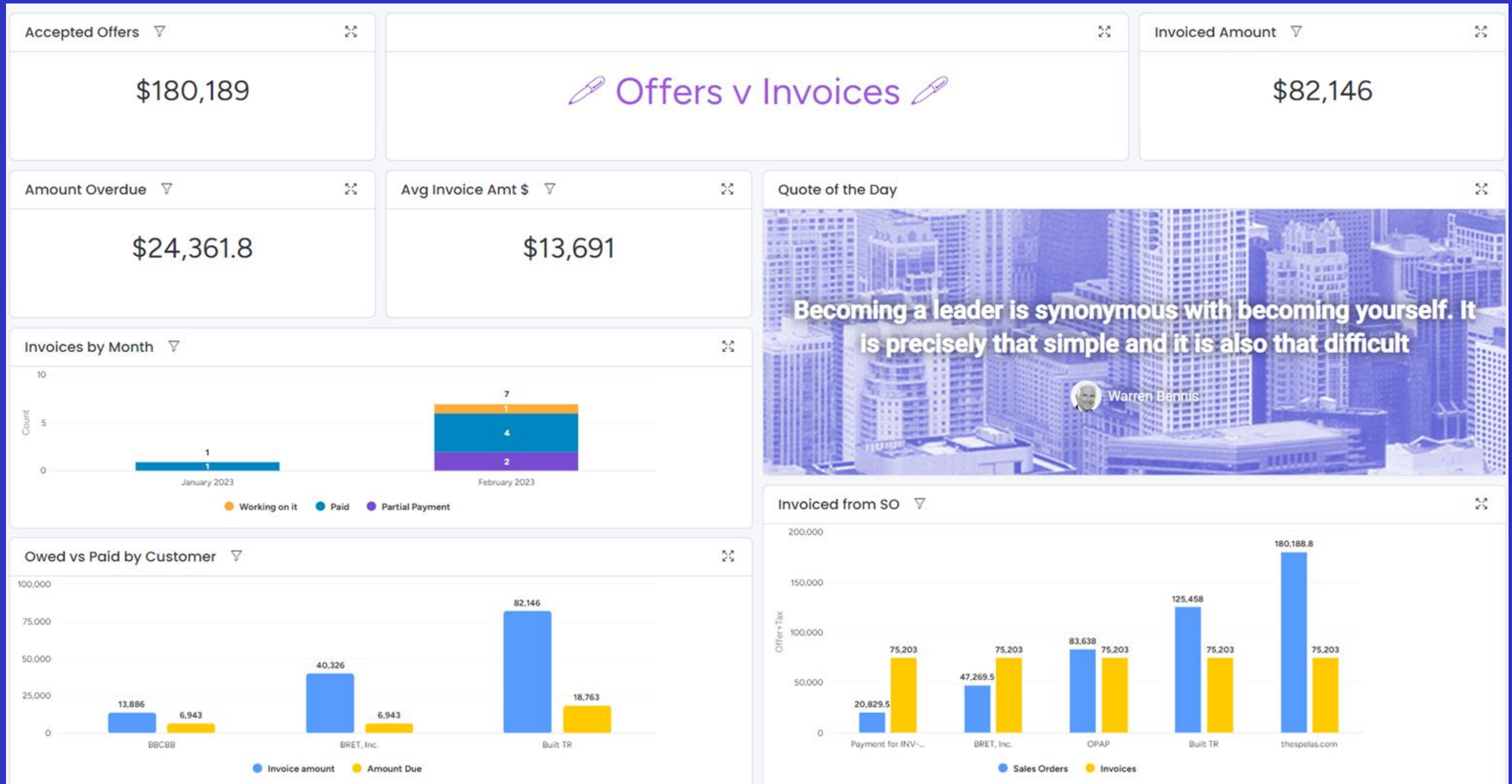


## Sales Dashboards

Provide a comprehensive overview of sales performance and other key metrics.

# Compare Offers, Invoices & Payments in Real time!

Get **up-to-the-minute** information on sales performance, allowing your business to identify trends and patterns, adjust pricing strategies, and **make informed decisions that can improve profitability and competitiveness.**





# CONTACT

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