thespelas.com

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?

➳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.

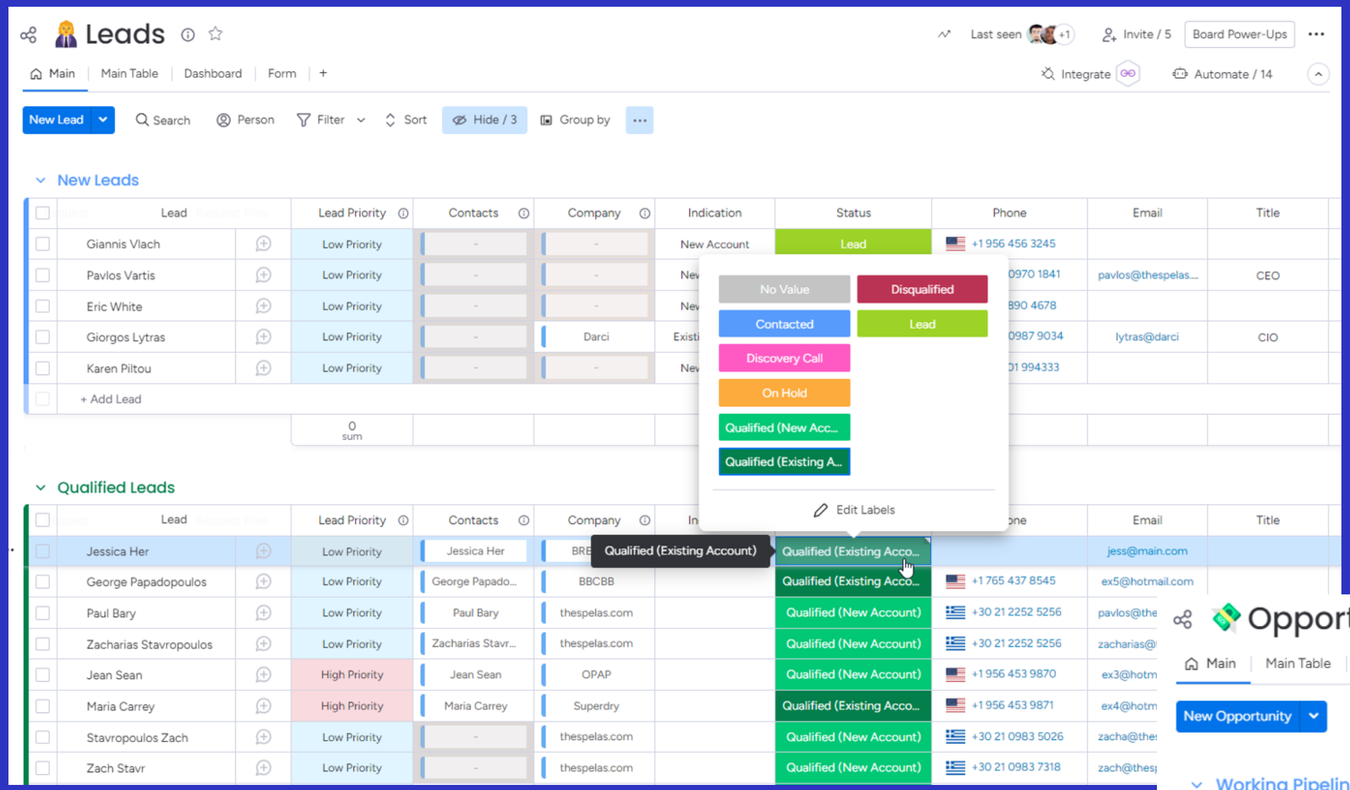
➳The emphasis on **Sales Orders (SO) and SO approval** ensures that your business can **streamline sales processes** and **quickly approve and keep track of orders and discounts**, reducing turnaround times and improving customer satisfaction,while the pricing table helps **optimize your pricing strategies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

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

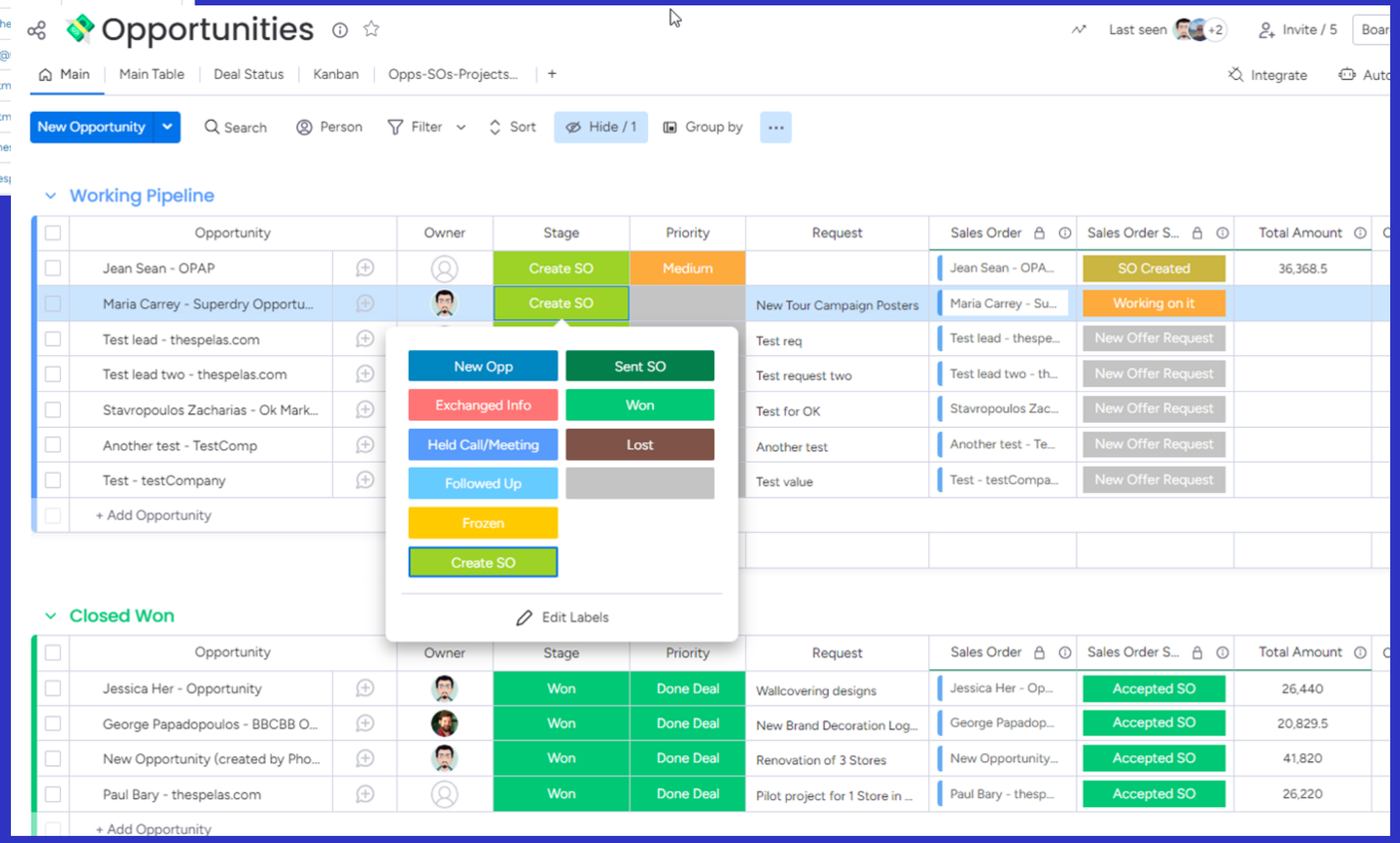


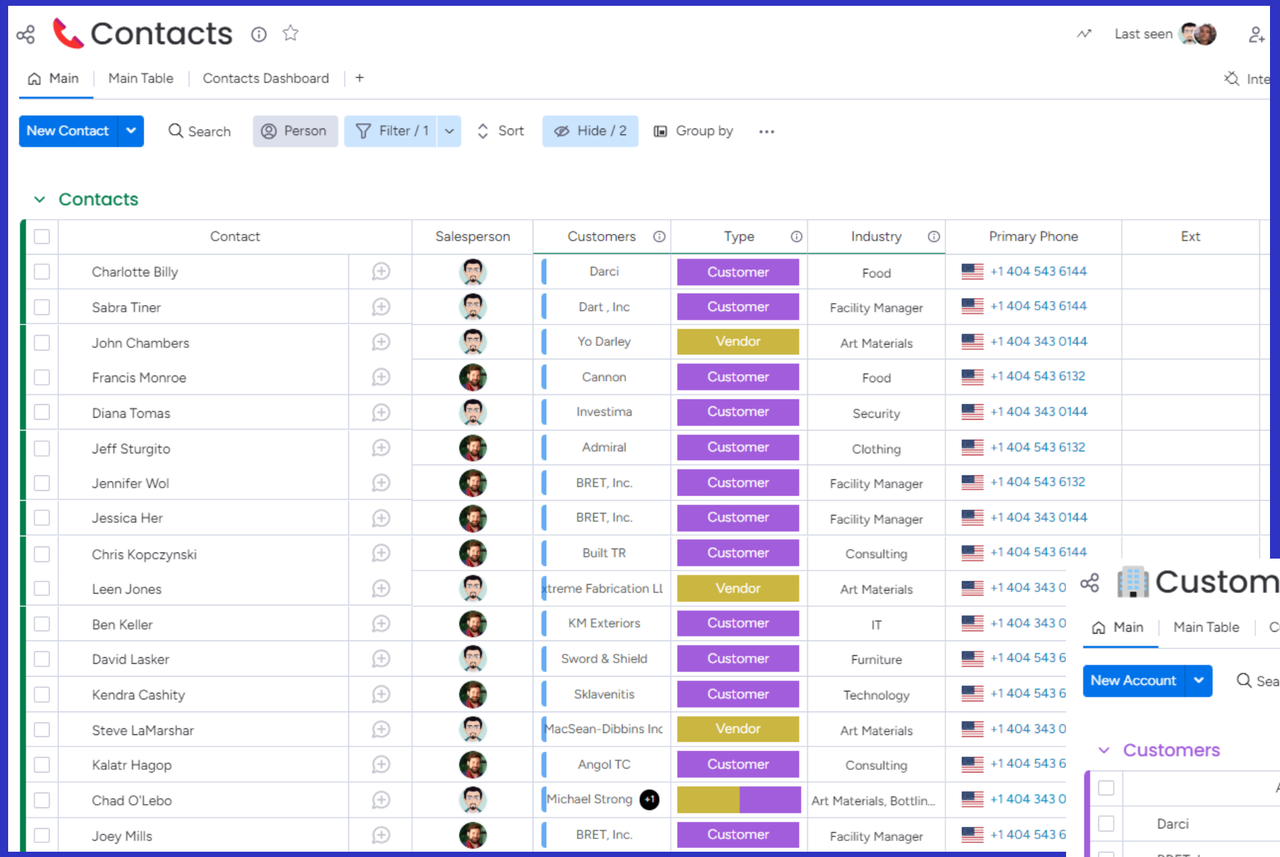
Leads Management

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

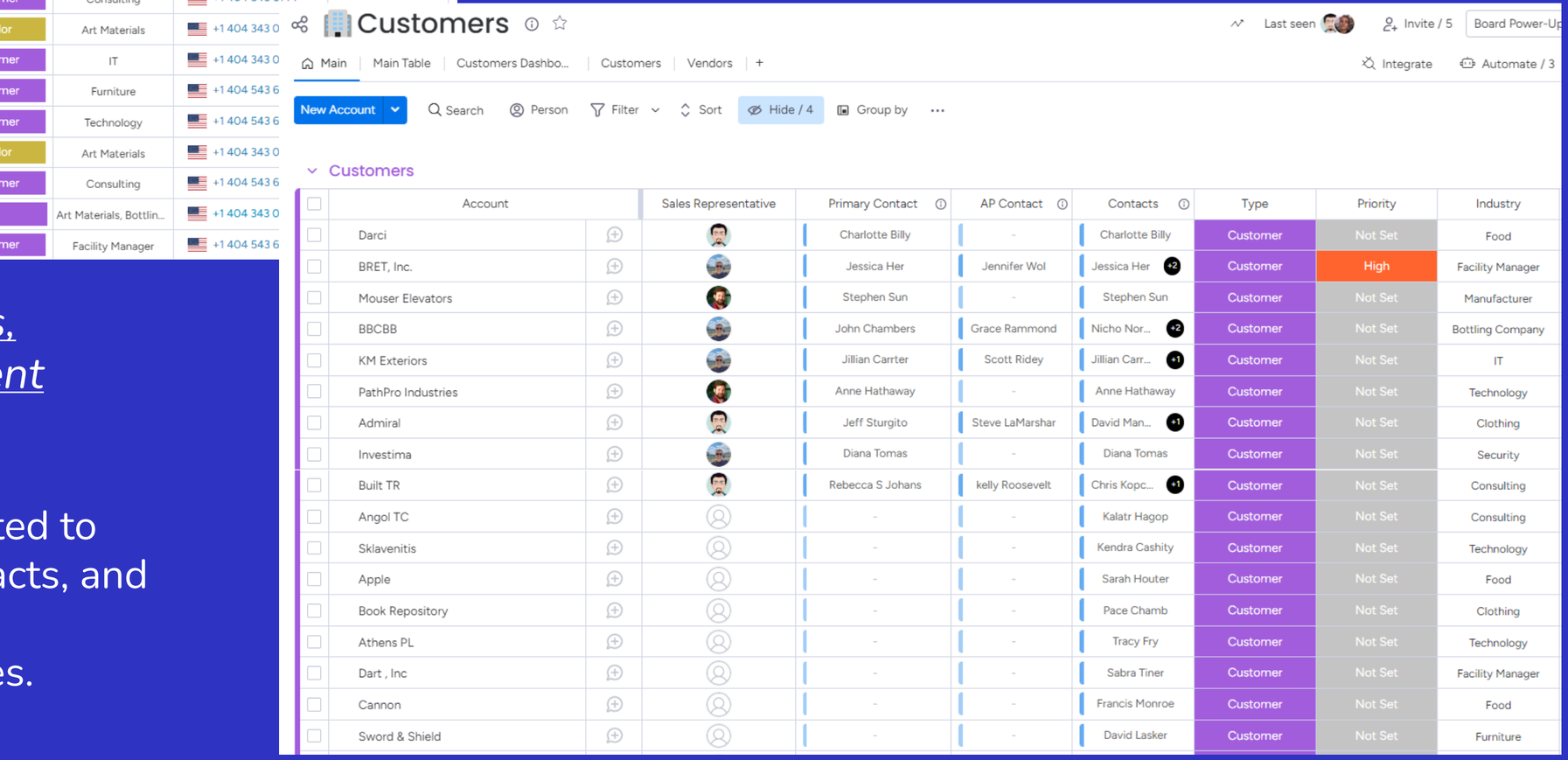
Optimize your Opportunities Management with capabilities such as **real-time close probability , forecasted value and deal stage tracking**. Start converting your opportunities into Sales Orders here.





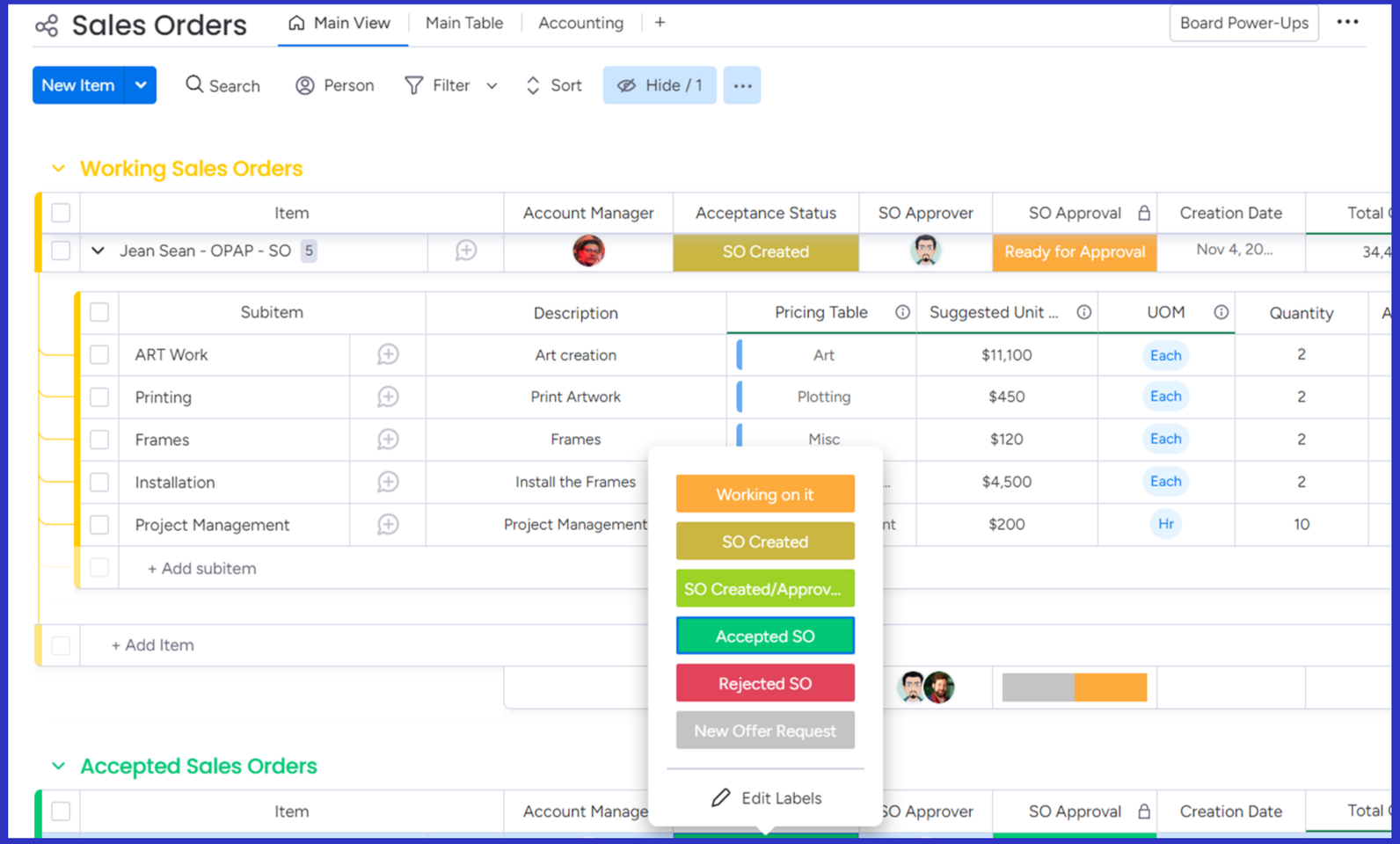
Contacts Management

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.

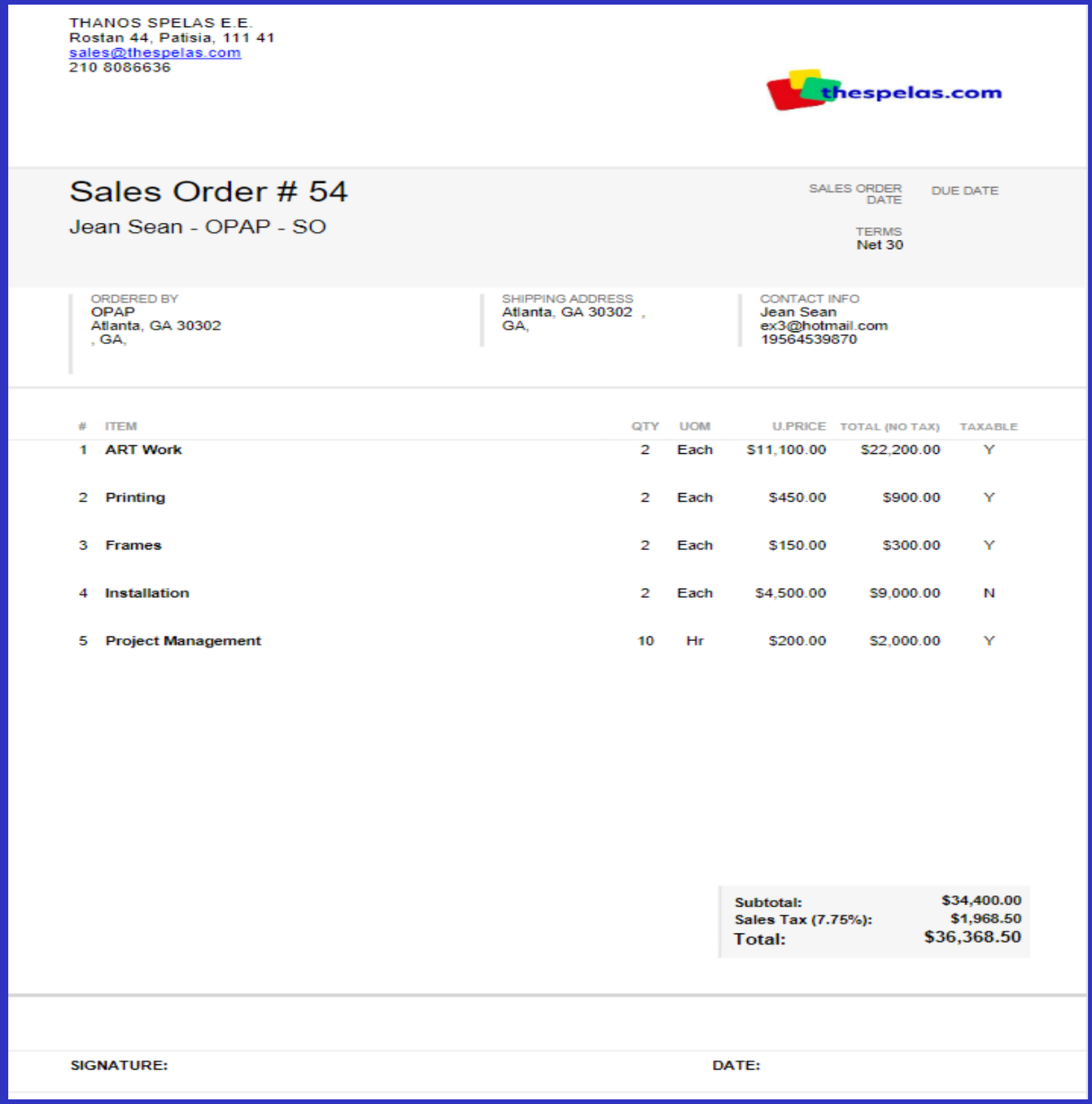


Sales Orders Management

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.**

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.



THANOS SPELAS E.E.
Rostan 44, Patisia, 111 41
sales@thespelas.com
210 8086636

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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

#	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

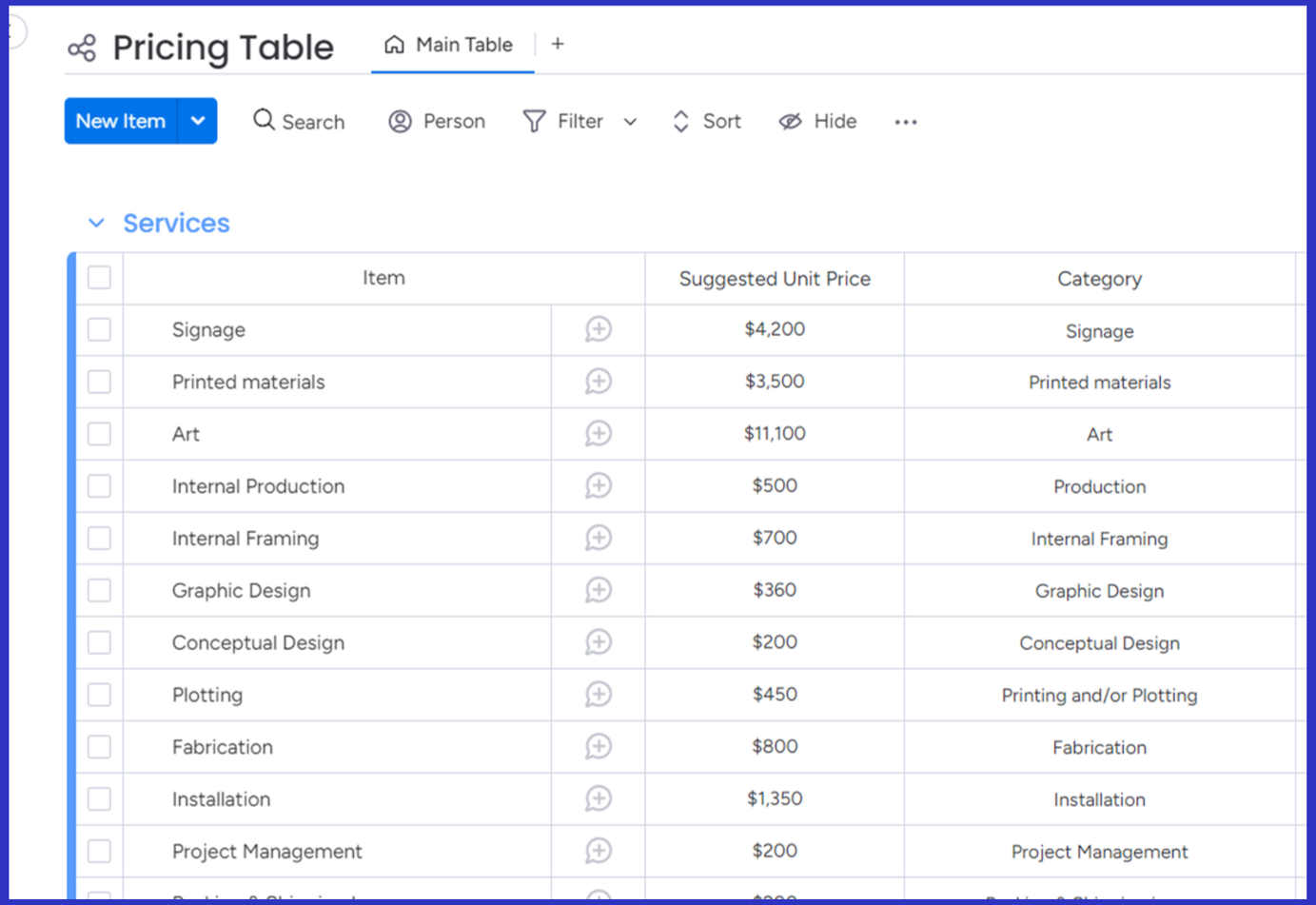
Subtotal:	$34,400.00
Sales Tax (7.75%):	$1,968.50
Total:	$36,368.50

SIGNATURE:

DATE:

Pricing Table

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



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

Why it is useful

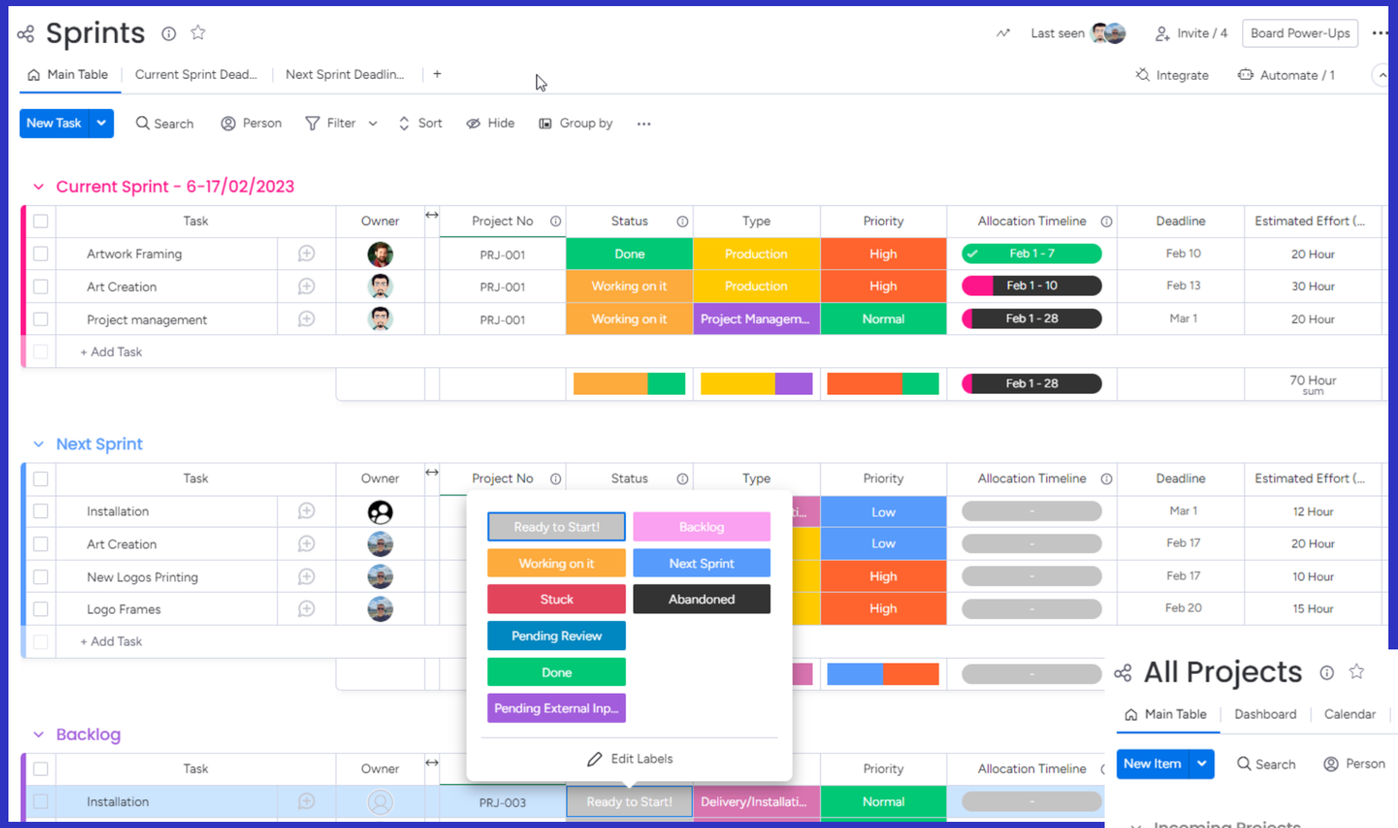
E2E's Pricing Table allows your business to provide c-level executives with a **comprehensive overview** of what is being sold, how it is being sold, and at what price, while also ensuring that **all sales are connected with proper approval to effectively manage overhead costs.**

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**.

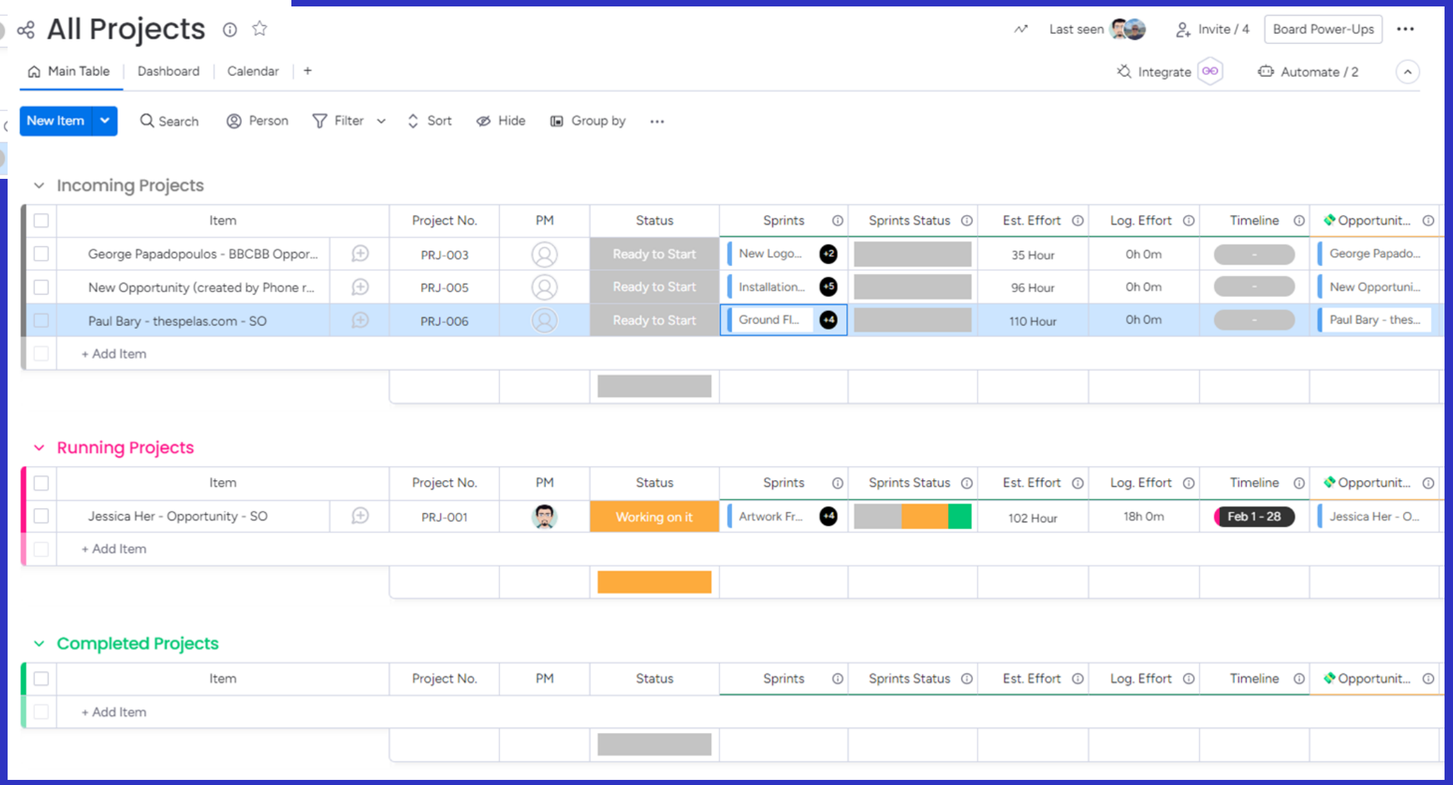
Sprint Management

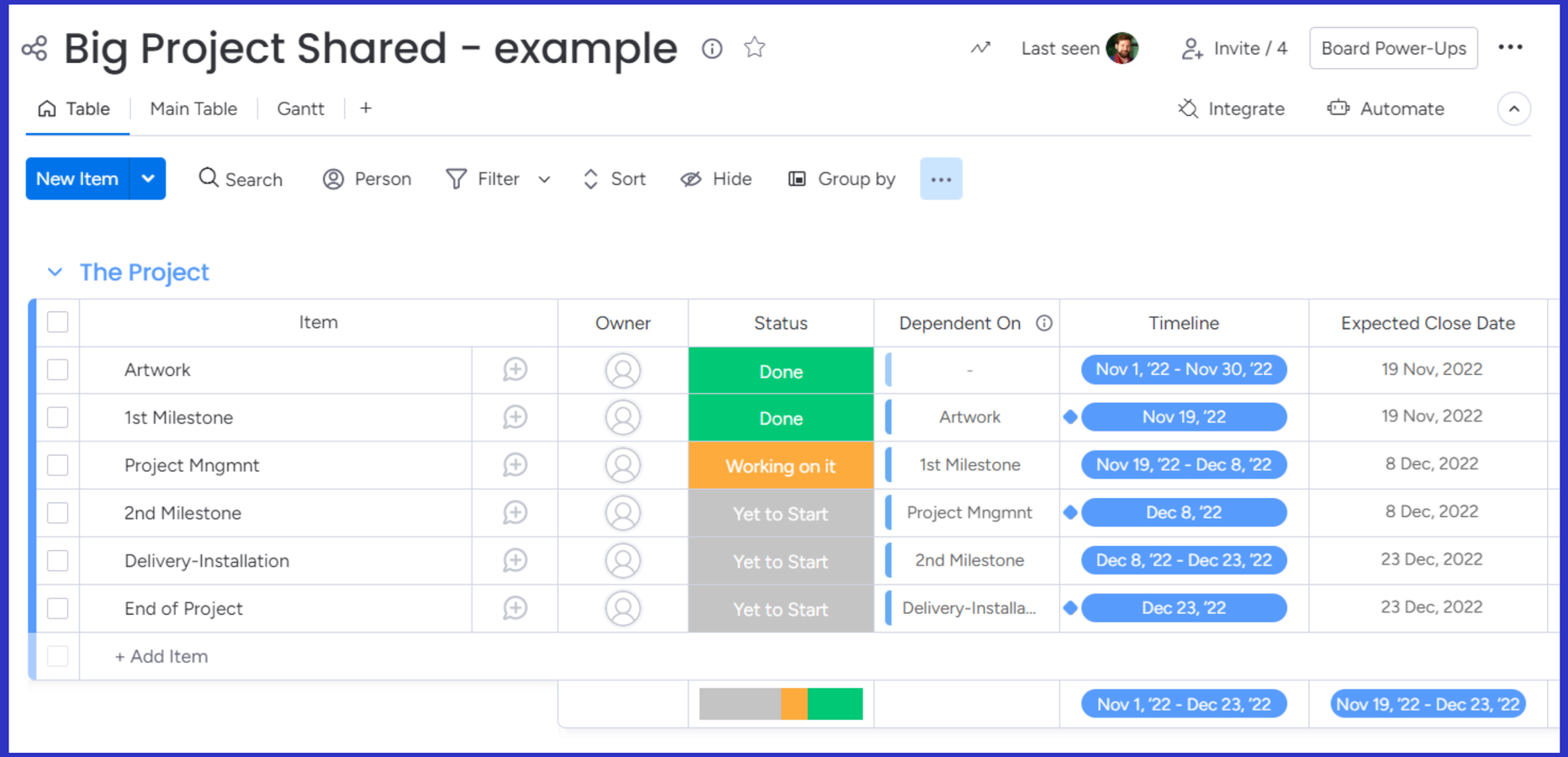
When an SO is accepted, **have the option to automatically create tasks** for every action that must be realized. Organize and manage your projects by breaking them down into simple tasks, allowing you to **prioritize certain items**, **collaborate effectively**, and **make iterative improvements** to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



Projects Management

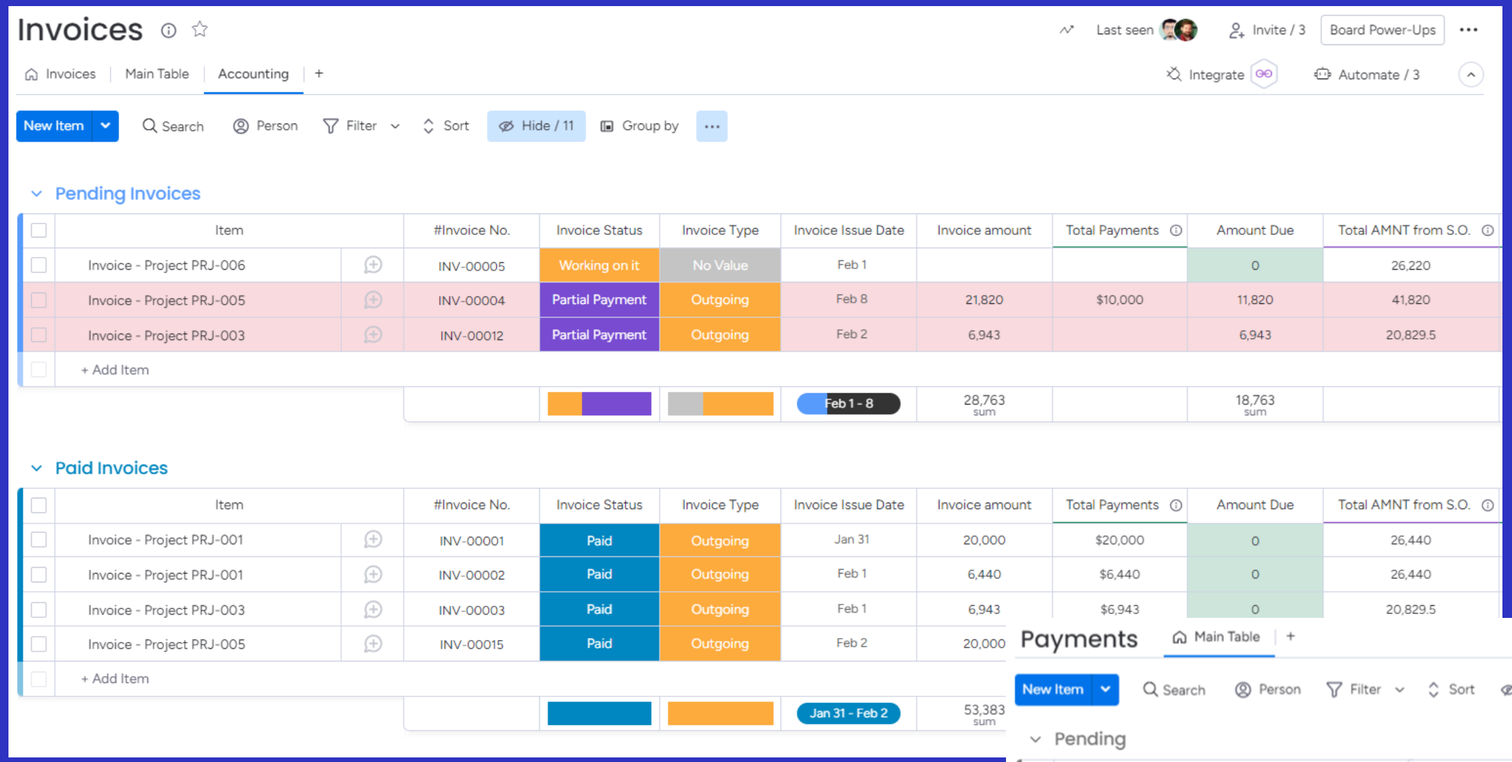
Monitor progress and **identify potential issues**, facilitating timely intervention and corrective action. **High level view** connected to Sales Orders, Opportunities, Invoices and Sprint Tasks.





& 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.

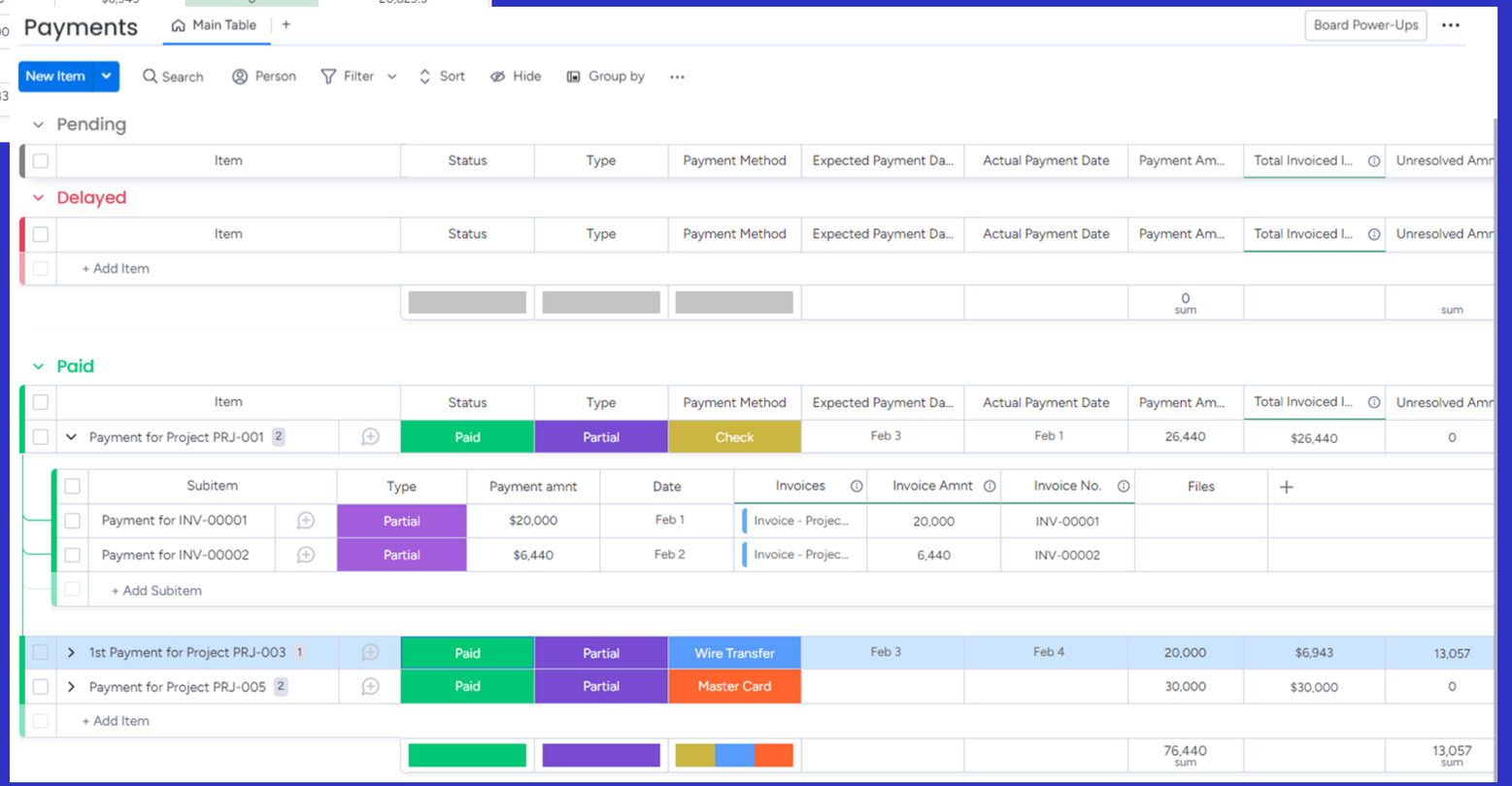


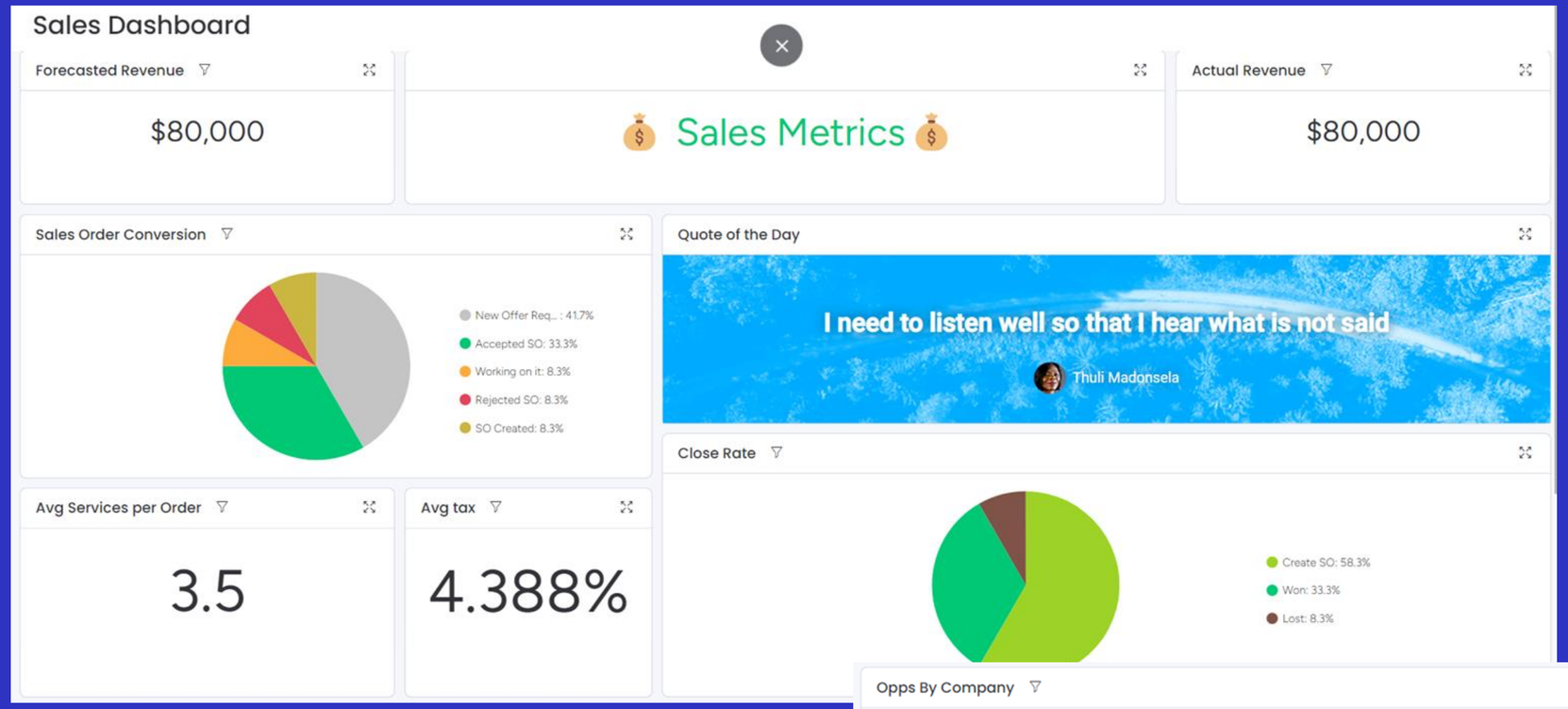
Invoice Management

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**.



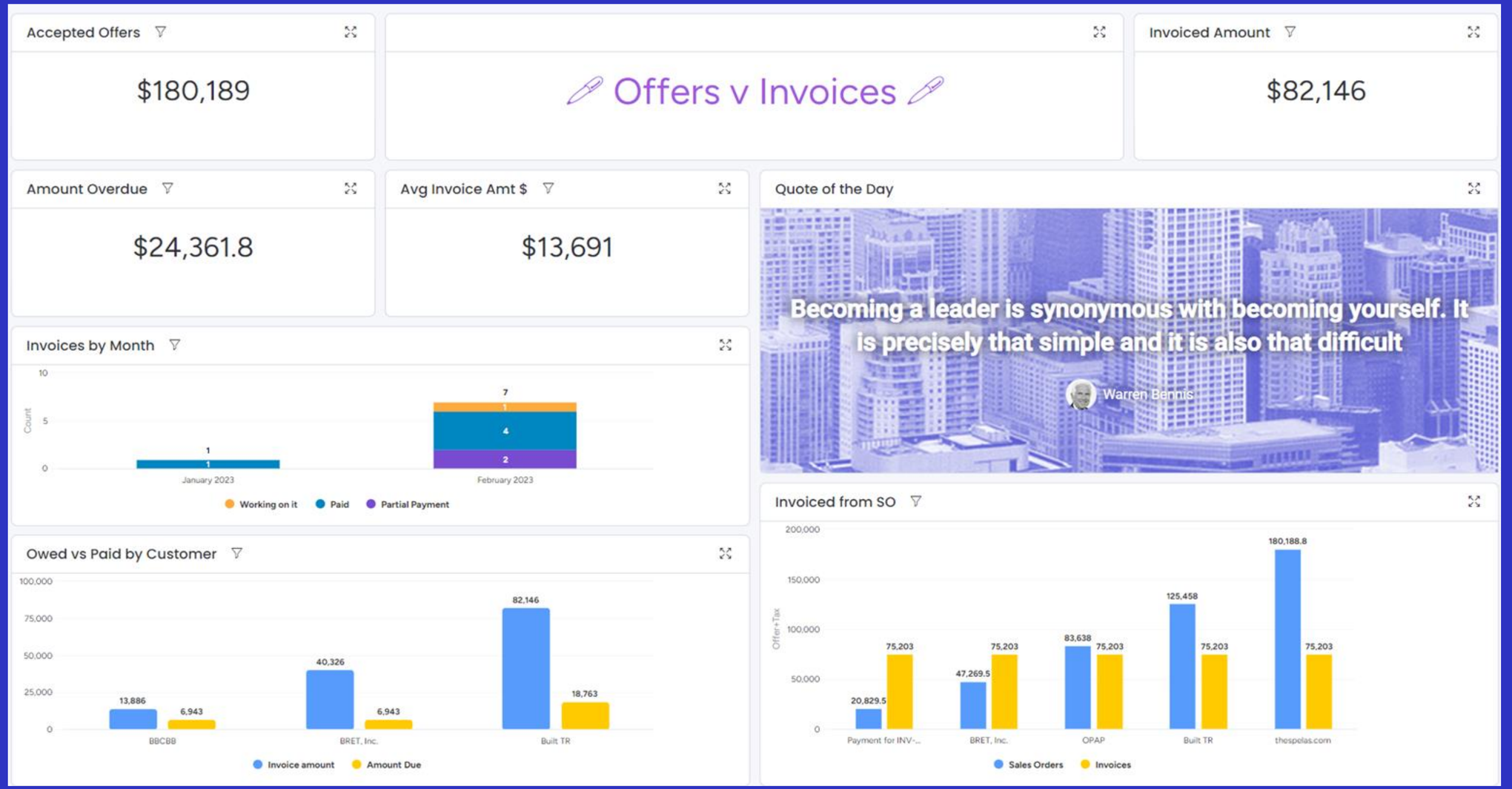


Sales Dashboards

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**.



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