

# How to Create a New Sales Record

## 1) Launch Add New Sales Dialog

The screenshot shows the PORTERS HR-Business Cloud interface. The top navigation bar includes 'Client', 'Recruiter', 'Job', 'Person', 'Resume', 'Process', 'Sales', and 'Activity'. The 'Process' menu is highlighted. Below the navigation bar, there is a breadcrumb trail: 'Process (8) > Add New Proc > Process | Hanako Yamada/Sample Client 01 (10004)'. The main content area is divided into two panes. The left pane shows a list of processes, with 'Hanako Yamada/Sample Client 01' selected. The right pane shows the detailed view of this process, including sections for 'Basic Information', 'Contact Information', and 'System Information'. At the bottom of the right pane, there is a 'Sublist | Sales' section with an 'Add New' button highlighted in a red box. A green callout box with a red border contains the following text: 'Display the Detailed View from Process List View, and then please click “Add New” in the “Sublist | Sales”'. Below this text, it says: '※If there is no process record, click “Add New” in the Sales global menu.'

- ※ There is a possibility that the screen image might change.
- ※ In this manual, the default menus displayed are the default settings.  
To change the global menu display settings, please refer to the document “How to Customize the Global Menu”.

## 2) Enter Sales Amount

**Sales - New**

Basic Information

Sales ID		Client	Sample Client 01
Sales Amount	1,000,000	Recruiter	Sample Recruiter 01
Record Date		Job	Sample Job 01
Joining Date		Job Owner	N/A Catherine Porters
		Resume	Hanako Yamada(10003)
		Resume Owner	N/A Catherine Porters

Billing Information

Billing Client Name		Billing Zip Code	
Billing Division		Billing Address	
Billing Title			
Billing Name			

System Information

Date Created	
Registered by	

Send notification email

Save Cancel

Enter the Sales Amount.

In case you launched the Add New Sales dialog from the Process menu, the Job and Resume information are automatically reflected in the dialog.

## 3) Record Date

**Sales - New**

Basic Information

Sales ID: [ ] Client: Sample Client 01 [edit]

Sales Amount: 1,000,000 Recruiter: Sample Recruiter 01 [edit]

Record Date: [ ] [calendar icon]

Joining Date: Oct 2014 [calendar icon]

Sales Owner: [ ]

Billing Information

Billing Client Name: [ ] Billing Zip Code: [ ]

Billing Division: [ ] Billing Address: [ ]

Billing Title: [ ]

Billing Name: [ ]

System Information

Date Created: [ ] Date Updated: [ ]

Registered by: [ ] Updated by: [ ]

Send notification email [ ]

Save Cancel

To enter the Record Date, you can either use the calendar or set it directly.

※When you click on the clock mark, the Record Date is displayed.

## 4) Save

**Sales - New**

required web document

▼ Basic Information

Sales ID		Client	Sample Client 01
Sales Amount	1,000,000	Recruiter	Sample Recruiter 01
Record Date	2014/10/20	Job	Sample Job 01
Joining Date		Job Owner	N/A Catherine Porters
Sales Owner	N/A Catherine Porters	Resume	Hanako Yamada(10003)
		Resume Owner	N/A Catherine Porters

▼ Billing Information

Billing Client Name		Billing Zip Code	
Billing Division		Billing Address	
Billing Title			
Billing Name			

▼ System Information

Date Created		Date Updated	
Registered by		Updated by	

Send notification email

**Save** Cancel

After entering the sales information, click the "Save" button.

## 5) Verify from Sublist

PORTERS Trial expires in 330 days Stacie Apps ?

Client Recruiter Job Person Resume Process Sales Activity

**Process (1)** Add x Process | **Hanako Yamada/Sample Client 01 (10005)** | (0) Print View

Matching(0)  Job Sent(1) Recommend(0) 1st Interv...

**Hanako Yamada/Sample Client 01**

Process	Job S
Process Date	2014
Process Memo	
End Flag	
End Reason	
Estimated Sales	
Expected Closing Date	
Process Owner	N/A

Process ID 10005 Client [Sample Client 01](#)

Process (Current) Job Sent Recruiter [Sample Recruiter 01](#)

Process Date (Current) 2014/10/29 02:41:00 Job [Sample Job 01\(JobId:10001\)](#)

Process Memo (Current) Job Owner

End Flag Resume [Hanako Yamada\(10003\)](#)

End Reason Resume Owner

Estimated Sales

Expected Closing Date

Process Owner

**Contact Information**

Telephone (Recruiter) 00-0000-0000 Telephone (Person) 03-1111-2222

Fax (Recruiter) 00-0000-0000 Fax (Person)

E-mail (Recruiter) [sample@porters.jp](mailto:sample@porters.jp) E-mail (Person) [hanako@porters.jp](mailto:hanako@porters.jp)

Mobile Number (Recruiter) 090-0000-0000 Mobile Number (Person) 080-2222-3333

Mobile E-mail (Recruiter) [sample@porters.jp](mailto:sample@porters.jp) Mobile E-mail (Person)

**System Information**

2015/07/22 09:46:31

/A Stacie

Edit Copy

**Sublist | Process**

Date	Date Updated
2014/10/29 02:41:00	2015/07/22 09:46:31
2014/06/20 01:15:00	2014/06/23 05:04:18

**Sublist | Sales** Add New Sales List

Sales ID	Client Name	Position	Resume Title	Sales Amount	Record Date	Joining Date	Date Updated
10002	Sample Client 01	Sample Job 01(Job bid:10001)	Sample Person 02 (10002)	1,500,000	2014/06/16	2014/05/16	2014/05/19 07:19:28

The sales record can be verified in the Sublist.  
※In case it is not displayed, click the refresh button.

## 6) Verify from Menu

The screenshot displays the PORTERS HR-Business Cloud interface. At the top, there is a navigation menu with options: Client, Recruiter, Job, Person, Resume, Sales, Process, and Activity. The 'Sales' menu item is highlighted. Below the navigation menu, the 'Sales List (1)' view is shown. It includes a search bar with the value '10010' and buttons for 'Add New Sales' and 'Bulk Action'. A table of sales records is displayed below the search bar. The table has columns for Client, Job, Resume, Sales Amount, Record Date, and Joining Date. The data row shows: Client: Sample Client 01, Job: Sample Job 01, Resume: Hanako Yamada(10003), Sales Amount: 1,000,000, Record Date: 2014/10/20, and Joining Date. At the bottom right of the interface, there are links for 'Terms of Agreement' and 'About PORTERS HR-Business Cloud', and a copyright notice: 'copyright © PORTERS Corporation All Rights Reserved.' A callout box with a green background and white text points to the table, stating: 'Sales record can also be verified in the Sales list view.'

Client	Job	Resume	Sales Amount	Record Date	Joining Date
Sample Client 01	Sample Job 01	Hanako Yamada(10003)	1,000,000	2014/10/20	

Sales record can also be verified in the Sales list view.