

営業ポータル

SharePoint Online

03

営業業務向けポータルサイト

社外から閲覧投稿するための掲示板、報告用の営業日報・簡易売上入力や、日々利用する資料ファイル共有の機能が利用できます。

社外活動が多い営業マンが利用するためのポータルサイトです。

The screenshot displays the '営業ポータル' (Sales Portal) interface on a SharePoint Online site. The page is organized into several main sections:

- 営業掲示板 (Sales Bulletin Board):** A list of recent posts with columns for '分類' (Category), 'タイトル' (Title), and '更新日時' (Update Time). Topics include discussions on sales activities, progress reports, and company policies.
- 売上入力 (Sales Input):** A table for entering sales data. Columns include '売上月' (Sales Month), '販売担当' (Sales Officer), '得意先名' (Customer Name), '合計金額' (Total Amount), '営業利益' (Operating Profit), and '入金月' (Payment Month).
- 営業日報 (Sales Daily Report):** A table for reporting daily sales activities. Columns include '訪問先企業' (Visited Company), '報告日' (Report Date), '部署' (Department), '担当者' (Staff), '分類' (Category), and '売上金額' (Sales Amount).
- 提案書ファイル (Proposal Documents):** A list of proposal documents with columns for '名前' (Name), '提出先企業' (Submitted to Company), '更新日時' (Update Time), and '更新者' (Updater).
- 見積もり・請求書ファイル (Quotation/Invoice Documents):** A list of quotation and invoice documents with columns for '名前' (Name), '提出先企業' (Submitted to Company), '更新日時' (Update Time), and '更新者' (Updater).