

# Create New Opportunity

1. From **CRM** module, click **Opportunities**. All Opportunities search screen will appear. 3 tabs will be available (All Opportunities, Pipeline Forecast, Win/Loss Analysis)

Created Date	RFP/RFI Link	Attachment	Opportunity Name	Pipe Status	Competitor	Current System	Lines of Business	Close By Date	Source	Campaign	Description D	Pipe Percentage	Software Amount	Maintenance Amol	Other Amount	Opportunity Amol	Net Opportunity A	Last Activity D
03/21/2018	https://google.c...		Test Opportunity #1	3. Competing	Will not disclose	Will not disclose	Consultant		Prospecting			50.00%	10,000.00	0.00	0.00	10,000.00	5,000.00	03/21/2018

2. Click **New** toolbar button to create new opportunity. New Opportunity screen will appear.

\*Direction field will be visible only for users with ticket management/grain license.

\*\*if user logged in is a Sales Person, direction should be default to **Sale** else it should be **Purchase**.

\*\*\*required fields: Opportunity Name, Executive Update, Entity, Contact and Opportunity Status

\*\*\*\*if Line of Business is Software, refer to image 2.2, if not refer to image 2.1

**Opportunity - Test Opportunity #1**

New Save Search Undo Duplicate Delete Close

Details Overview Prospect Requirements (0) Activities Attachments Audit Logs

Direction: Sale

Opportunity Name: Test Opportunity #1 Executive Update: The LoB is not Software

Company Loc: 01 Source: Prospecting Created Date: 3/21/2018

Entity: Test\_Customer\_495 RFP / RFI Link: https://google.com Close By Date: [ ]

Entity Location: Test\_Location Competitor: Will not disclose Go Live Date: [ ]

Contact: Test\_Contact\_495 Current Solution: Will not disclose Completed: [ ]

Phone: 765-432-1 Referred By: Test\_Customer\_880

Campaign: [ ]

Lines of Business: Consultant

Sales Pipe Status: 1. Nurturing

Key Data Quotes/Orders (0) Contracts (0) Win/Loss

Sales Person: Darel Ronquillo

Opportunity Status: Open

Internal Project Manager: Darel Ronquillo

Initial Data Collection Complete: [ ]

Customer Project Manager: Test\_Contact\_495

Customer Leadership Sponsor: Test\_Contact\_495

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**Opportunity - Test Opportunity 2**

New Save Search Undo Duplicate Delete Close

Details Overview Prospect Requirements (0) Activities Attachments Audit Logs

Direction: Sale

Opportunity Name: Test Opportunity 2 Executive Update: LoB is Software

Company Loc: 01 Source: Help Desk Created Date: 3/21/2018

Entity: Test\_Customer\_880 RFP / RFI Link: http://google.com Close By Date: 3/31/2018

Entity Location: Test\_Location Product: SmokeTest\_HD\_880 Go Live Date: 4/2/2018

Contact: Test\_Contact\_880 Version: 18.1 Kickoff Dates: 4/2/2018

Phone: 1234567 Competitor: Will not disclose % Complete: 50

Campaign: Current Solution: Will not disclose Completed:

Lines of Business: Software Referred By: Test\_Customer\_493

Sales Pipe Status: 1. Nurturing Milestone: Project planning

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Key Data Quotes/Orders (0) Contracts (0) Win/Loss

Sales Person: Darel Ronquillo Software Bill Date: 3/30/2018

Opportunity Status: Open Software Bill Date Comments:

Internal Project Manager: Darel Ronquillo

Initial Data Collection Complete:

Customer Project Manager: Test\_Contact\_880 Hardware Order Date: 3/30/2018

Customer Leadership Sponsor: Test\_Contact\_880 Hardware Bill Date Comments:

Customer Key Project Goals:

Custom Modifications:

Initial User Group Dues Invoice: 3/31/2018

Received Down Payment:

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3. Select Direction (*Sale / Purchase*) and input data to fields
4. Click Save
5. To add data under Key Data tab, go to **Key Data** tab then input data and save

Here are the fields under Key Data tab:

Key Data Quotes/Orders (1) Contracts (0) Win/Loss

Sales Person: Darel Ronquillo

Opportunity Status: Open

Internal Project Manager: Darel Ronquillo

Initial Data Collection Complete:

Customer Project Manager: Test\_Contact\_495

Customer Leadership Sponsor: Test\_Contact\_495

Key Data Quotes/Orders (0) Contracts (0) Win/Loss

Sales Person: Darel Ronquillo Software Bill Date: 3/30/2018

Opportunity Status: Open Software Bill Date Comments:

Internal Project Manager: Darel Ronquillo

Initial Data Collection Complete:

Customer Project Manager: Test\_Contact\_880 Hardware Order Date: 3/30/2018

Customer Leadership Sponsor: Test\_Contact\_880 Hardware Bill Date Comments:

Customer Key Project Goals:

Custom Modifications:

Initial User Group Dues Invoice: 3/31/2018

Received Down Payment:

7. To add data under Overview tab, go to **Overview** tab then input data and save.

Opportunity - Test Opportunity #1

New Save Search Undo Duplicate Delete Close

Details Overview Prospect Requirements (0) Activities Attachments Audit Logs

Contact Information

Contact Name	Contact Title	Location	Decision Role	Attitude	Extent of Contact	Key Concerns	Expectations of Us
Test_Contact_495	Tester	Test_Location	Unknown	Ally	Average	Nothing	Will not disclose

What are the top problems they are trying to solve?

Description*	Stake Holder
Supply is getting low	
Demand is getting too high	

What are the top concerns they have?

Description*	Stake Holder
Supply is getting low	Test_Contact_495

What do they gain by solving these problems?

Description*	Stake Holder
Increase customer loyalty & satisfaction	Test_Contact_4...
Improve customer retention & relationships	Test_Contact_4...

What is our unique business value?

Description*	Stake Holder
Deliver high-quality customer service	Test_Contact_4...

How do we solve their problems and concerns?

Description*
Collect, manage & monitor customer and prospect data

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To data under Prospect Requirement tab, go to **Prospect Requirements** tab. Select Question Type/Question, Responded and input your answer then click Save.

\*Respondent and Answer are required

Opportunity - Test Opportunity #1

New Save Search Undo Duplicate Delete Close

Details Overview Prospect Requirements (0) Activities Attachments Audit Logs

Question Type	Direction	LOB	Module	Question	Respondent*	Answer*	Date
General	Sale	"ALL"		How did you hear about us?	Test_Contact_495	Referral	3/21/2018

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9. To add an activity, go to **Activities** tab. Click New Event, New Task, New Comment, Log Call or Email then proceed.

Opportunity - Test Opportunity #1

New Save Search Undo Duplicate Delete Close

Details Overview Prospect Requirements (1) **Activities** Attachments Audit Logs

Open New Event New Task New Comment Log Call Send Email Export View Filter (F3)

Type	Attachment	Created	Subject	Start/Due Date	Created By	Assigned To	Status	Priority	Category
Comment	0	3/21/2018 10:54am	Collect Data	3/21/2018 8:00am	Darel Ronquillo	Darel Ronquillo		Normal	
Task	0	3/21/2018 10:37am	Collect, manage & monitor customer and prospect data	3/21/2018 8:00am	Darel Ronquillo	Darel Ronquillo	Open	Normal	Task

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10. To add **Attachments**, click Attachments tab. Click Add Item button then select attachment to be added.

Opportunity - Test Opportunity #1

New Save Search Undo Duplicate Delete Close

Details Overview Prospect Requirements (1) Activities **Attachments** Audit Logs

+ Add Item Open Edit Download Delete Filter Filter (F3)

Name	Type	Size	Date Added	Comment	User
Sources 2018-02-22 928692.pdf	application/pdf	1.03 Kb	3/21/2018		Darel Ronquillo

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11. To add **Quotes** or **Orders**, click Quotes/Orders tab. Select quote/order number from Quote Number grid drop down. User can also create new quote or order, click Add Quote button then proceed.

\*Quotes/Orders button is disable for purchase opportunity. It means user selected a vendor.

**Opportunity - Test Opportunity #1**

New Save Search Undo Duplicate Delete Close

Details Overview Prospect Requirements (1) Activities Attachments Audit Logs

Direction: Sale

Opportunity Name: Test Opportunity #1 Executive Update: The LoB is not Software

Company Loc: 01 Source: Prospecting Created Date: 3/21/2018

Entity: Test\_Customer\_495 RFP / RFI Link: https://google.com Close By Date:

Entity Location: Test\_Location Competitor: Will not disclose Go Live Date:

Contact: Test\_Contact\_495 Current Solution: Will not disclose Completed:

Phone: 765-432-1 Referred By: Test\_Customer\_880

Campaign:

Lines of Business: Consultant

Sales Pipe Status: 3. Competing

Key Data Quotes/Orders (1) Contracts (0) Win/Loss

+ Add Quote Open Remove Export View Filter (F3)

Quote Number	Status	Type	Term	Date	Due Date	Amount Due	Discount	Order Total	Payment	Processed
QJ-210	Open	Software	Net 100 days	3/21/2018	6/29/2018	10,000.00	0.00	10,000.00	0.00	<input type="checkbox"/>
						10,000.00	0.00	10,000.00	0.00	<input type="checkbox"/>

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12. To add **Contracts**, click Contract tab. Select contract number from Contract Number grid drop down. User can also create new contract, click Add Contract button then proceed. Save the opportunity.

13. To add **Win/Loss** details, click Win/Loss tab. Provide the details of the Win/Loss then save.

**Opportunity - Test Opportunity 3**

New Save Search Undo Duplicate Delete Close

Details Overview Prospect Requirements (0) Activities Attachments Audit Logs

Direction: Sale

Opportunity Name: Test Opportunity 3 Executive Update: Win/Loss

Company Loc: 01 Source: Created Date: 3/21/2018

Entity: Test\_Customer\_880 RFP / RFI Link: Close By Date:

Entity Location: Test\_Location Product: SmokeTest\_HD\_880 Go Live Date:

Contact: Test\_Contact\_880 Version: 18.1 Kickoff Dates:

Phone: 1234567 Competitor: % Complete: 50

Campaign: Current Solution: Completed:

Lines of Business: Software Referred By:

Sales Pipe Status: 6. Lost Milestone:

Key Data Quotes/Orders (0) Contracts (0) Win/Loss

Win/Loss Reason: Customer Disengaged | Price | Did Right: Provided all product details

Lost to: Will not disclose

Date: 3/21/2018 Length of Cycle:

Details: Customer suddenly disengaged because of the price

Did Wrong:

Action Items:

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User can now view this opportunity in Win/Loss Analysis tab:

**All Opportunities**

Close

All Opportunities | Pipeline Forecast | Win/Loss Analysis

Open Selected | New | Export | Columns | View

Entity Name | Contains | Add Filter

Entity Name	Date	Reason	Line of Business
<input type="checkbox"/> Test_Customer_880	3/21/2018	Customer Disengaged,Price	Software

14. Opportunities can also be generated by using **Activities** and **Lost Revenue**.

**Activities:**

- Create or open an activity, activity must not be related to any transaction.

**Event - Test Event 1**

Done Save Delete Undo Follow-Up Duplicate Create Opportunity Close

Details | Attendees | Notes | Attachments | Audit Log | Jira Issues | Hours Worked

Source: CRM | Company Loc: 01 | Activity No: ACT-4421

Subject: \* Test Event 1 | Private | Related To | Record No

Contact: Test\_Contact\_495 | Entity: Test\_Customer\_495 | Phone: 765-432-1 | Mobile

Contact Email: darelwebster2@gmail.com | Send Outlook Email | Entity Loc: Test\_Location | Show Time As

Start: 3/21/2018 8:00 AM | All-Day Event | Time Zone: Kuala Lumpur, Singapo | Local Time

End: 3/21/2018 8:30 AM | Reminder: None | LOB: Consultant

Status: Open | Priority: Normal | Created By: Ars Galero | Created: 3/21/2018

Category: | Assigned To: Darel Ronquillo

Event is not related to any transaction. Create Opportunity button must be visible and enabled.

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- Click Create Opportunity button. Once clicked, new opportunity screen will load. It should have the values from the activity (Opportunity Name, Company Location, Entity, Contact)
- Provide the other data then save

**Lost Revenue:**

- Go to Lost Revenues. Select row then check the Generate Opportunity grid checkbox. User can also add a salesperson. Click Save to generate opportunity.

**Lost Revenues / Missing Sales**

Save Close

Details

Revenue: From 1/1/2017 To 12/31/2017 | Compare to Revenue: From 1/1/2018 To 12/31/2018 | Opportunity Date: 3/21/2018 | Campaign: Campaign | Salesperson: Darel Ronquillo

Salesperson	From	To	Contracted Qty.	Total Sales Qty.	Units Difference	Units Percentage	Sales Difference	Sales Percentage	Lost Sale	Generate Opportu	Generate Campai	Contact
30	01/01/2018 to 12/31/2018	01/01/2018 to 12/31/2018	0.00	0.00	-1.00	-100.00	-12,000.00	-100.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
30	01/01/2018 to 12/31/2018	01/01/2018 to 12/31/2018	0.00	0.00	-1.00	-100.00	-12,000.00	-100.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
30	01/01/2018 to 12/31/2018	01/01/2018 to 12/31/2018	0.00	0.00	-1.00	-100.00	-12,000.00	-100.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Test_Contact_880

- Go to Opportunities and search for the generated Opportunity.

Opportunity - IRCRM: (-12000) 01/01/2018 to 12/31/2018 lost revenue compare to 01/01/2017 to 12/31/2017 Sales for Software Category, IRCRM Item.

New Save Search Undo Duplicate Delete Close

Details Overview Prospect Requirements (0) Activities Attachments Audit Logs

Direction: Sale

Opportunity Name: IRCRM: (-12000) 01/01/2018 to 12/31/2018 lost revenue compare to 01/01/2017 to 12/31/2017 Sales for Software Category Executive Update: IRCRM: (-12000) 01/01/2018 to 12/31/2018 lost revenue compare to 01/01/2017 to 12/31/2017 Sales for Software Category

Company Loc: 01 Source: Created Date: 3/21/2018

Entity: \* Test\_Customer\_880 RFP / RFI Link: Close By Date: 3/24/2018

Entity Location: Test\_Location Competitor: Go Live Date:

Contact: \* Test\_Contact\_880 Current Solution: Completed:

Phone: 1234567 Referred By:

Campaign:

Lines of Business:

Sales Pipe Status: 1. Nurturing

Key Data Quotes/Orders (0) Contracts (0) Win/Loss

Sales Person: Darel Ronquillo

Opportunity Status: \* Open

Internal Project Manager:

Initial Data Collection Complete:

Customer Project Manager:

Customer Leadership Sponsor:

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