

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)

All Opportunities

Close

All Opportunities | Pipeline Forecast | Win/Loss Analysis

Open Selected

New

Export

Columns

View

Created Date

Between

and

Add Filter

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

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: ☐

0.66s Saved Page 1 of 1 Refresh

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

+ Insert X Remove Export View Filter (F3)

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?

+ Insert X Remove Export View Filter (F3)

Description*

Supply is getting low

Demand is getting too high

What are the top concerns they have?

+ Insert X Remove Export View Filter (F3)

Description*

Stake Holder

Supply is getting low

Test_Contact_495

What do they gain by solving these problems?

+ Insert X Remove Export View Filter (F3)

Description*

Stake Holder

Increase customer loyalty & satisfaction

Test_Contact_4...

Improve customer retention & relationships

Test_Contact_4...

What is our unique business value?

+ Insert X Remove Export View Filter (F3)

Description*

Stake Holder

Deliver high-quality customer service

Test_Contact_4...

How do we solve their problems and concerns?

+ Insert X Remove Export View Filter (F3)

Description*

Collect, manage & monitor customer and prospect data

Page 1 of 1 Refresh

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

+ Insert X Remove Export View Filter (F3)

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

? 0.74s Ready Page 1 of 1 Refresh

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
QU-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"/>
										<input type="checkbox"/>
						10,000.00	0.00	10,000.00	0.00	

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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:

? 0.74s Saved Page 1 of 2 Refresh

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

- 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.

NewSaveSearchUndoDuplicateDeleteClose

DetailsOverviewProspect Requirements (0)ActivitiesAttachmentsAudit Logs

DirectionSale

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

Company Loc01

Entity+Test_Customer_880

Entity LocationTest_Location

Contact+Test_Contact_880

Phone1234567

Campaign

Lines of Business

Sales Pipe Status1. Nurturing

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

Source

RFP / RFI Link

Competitor

Current Solution

Referred By

Created Date3/21/2018

Close By Date3/24/2018

Go Live Date

Completed

Key DataQuotes/Orders (0)Contracts (0)Win/Loss

Sales PersonDarel Ronquillo

Opportunity Status+Open

Internal Project Manager

Initial Data Collection Complete

Customer Project Manager

Customer Leadership Sponsor

1.64sReady

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