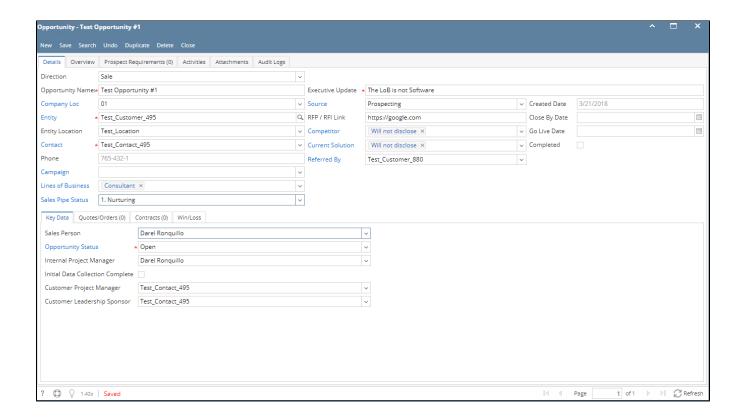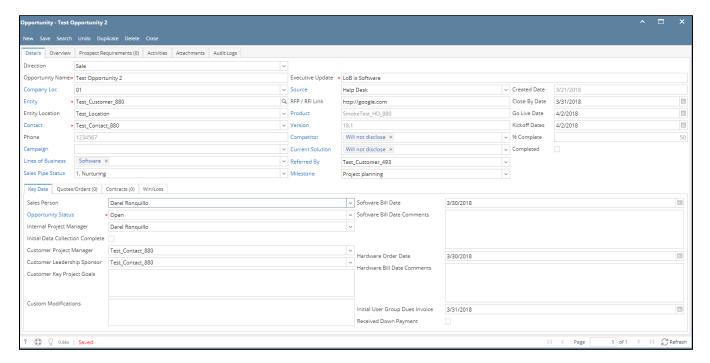# Create New Opportunity

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

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

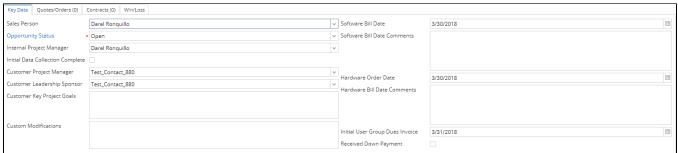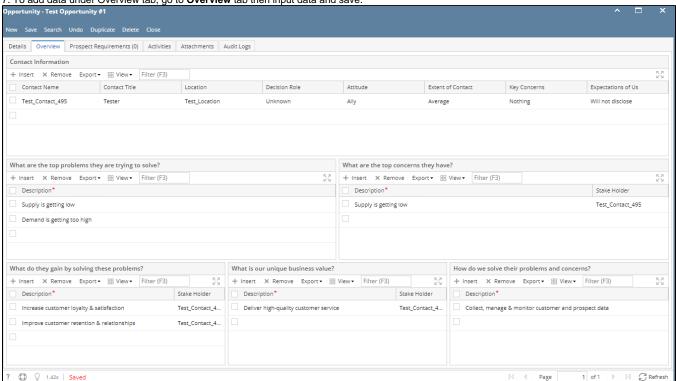****if Line of Business is Software, refer to image 2.2, if not refer to image 2.1

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

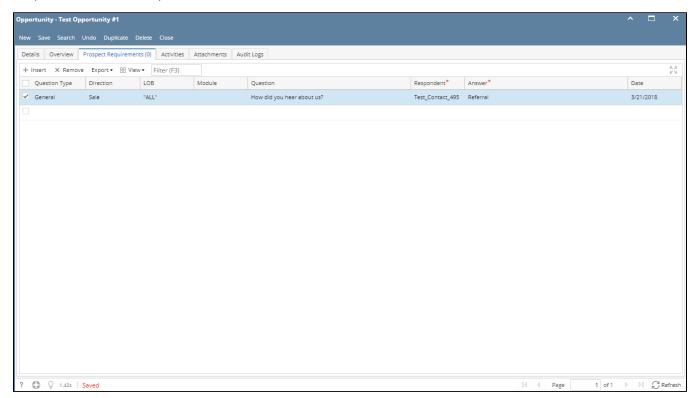Here are the fields under Key Data tab:

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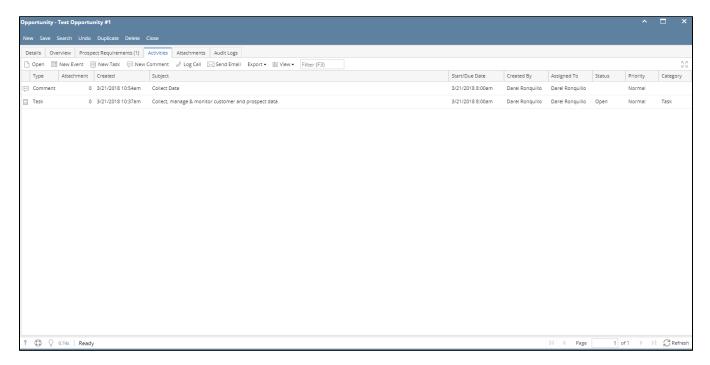

8.

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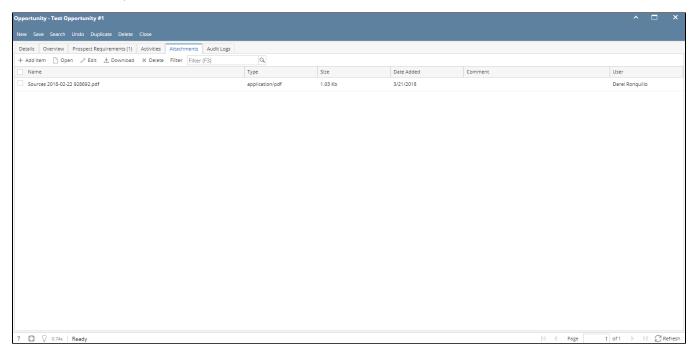
*Respondent and Answer are required

9. To add an activity, go to **Activities** tab. Click New Event, New Task, New Comment, Log Call or Email then proceed.
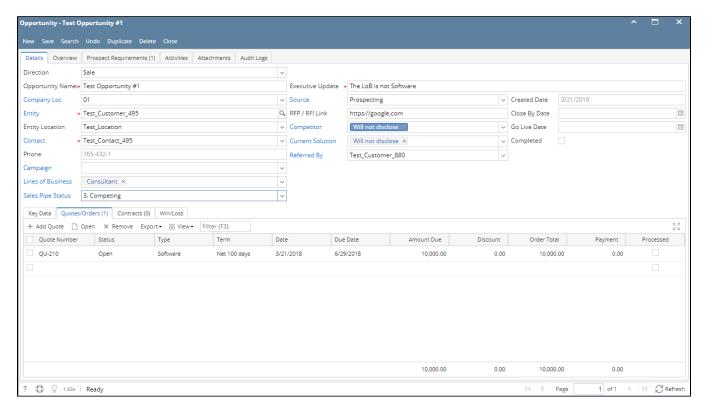
10. To add **Attachments**, click Attachments tab. Click Add Item button then select attachment to be added.
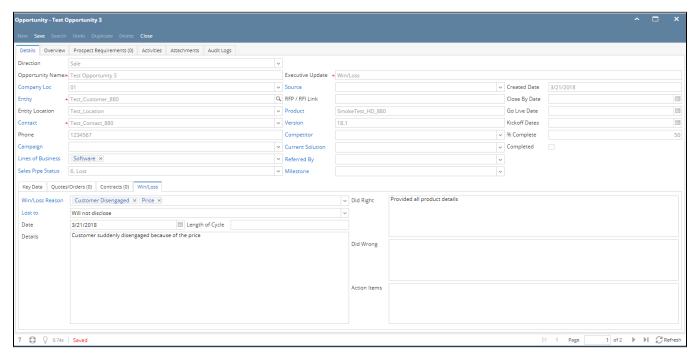

11. To add **Quotes** or **Orders,** click Quotes/Orders tab. Select quote/order number from Quote Number grid drop down. User can also create new quote or order, click Add Quote button then proceed.

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

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.
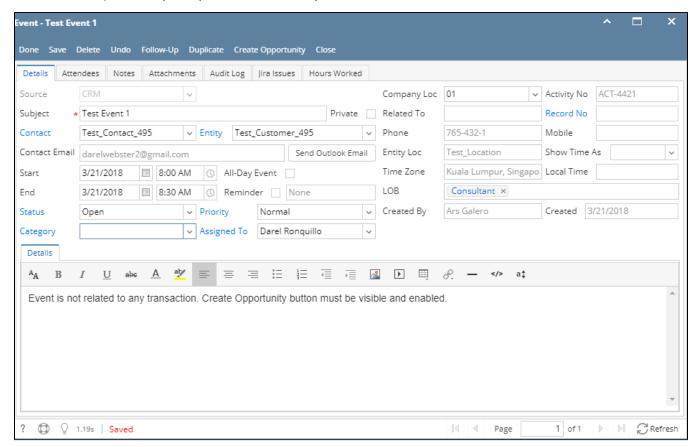

User can now view this opportunity in Win/Loss Analysis tab:

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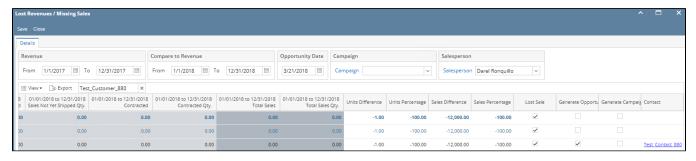
Activities:

- Create or open an activity, activity must no be related to any transaction.

- 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.

- Go to Opportunities and search for the generated Opportunity.