Opportunities

Creating New Opportunity

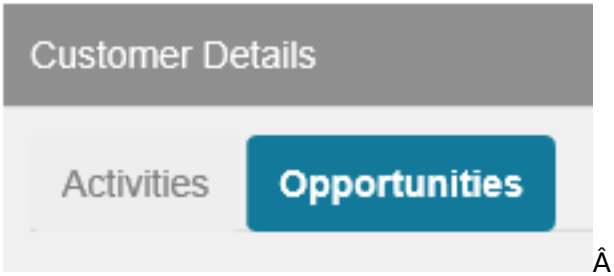
1. New opportunities should be created for every contact that you speak to who would like to make a booking but has not yet been able to confirm dates, number of tickets or product options.Â You can create an opportunity for customers where you know you are likely to complete the booking or as an initial cold call.Â Â Contacts should have an Opportunity open, or if a new contact, one created.Â **OPPORTUNITIES SHOULD ONLY BE CREATED FOR A CONTACT**.Â

Â

To create a NEW OPPORTUNITY do the following ...

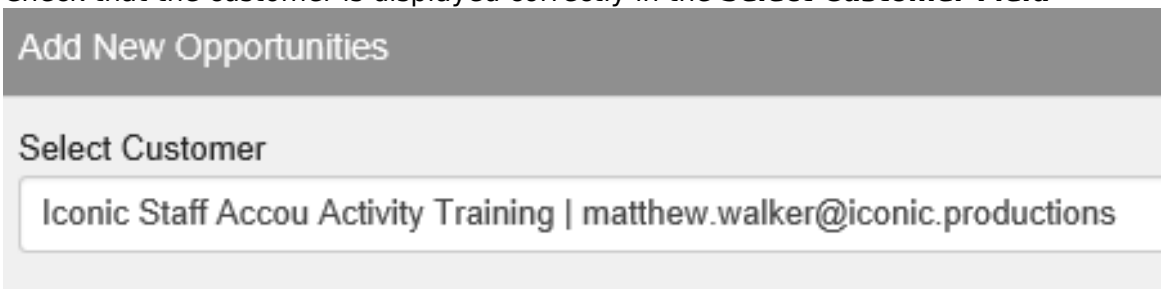
1. There are two ways to create a New Opportunity.
    1. **Option 1 =** In the Customer Detail Page click on 

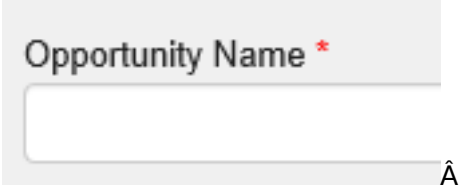
Â to open the New Opportunity page.
    2. **Option 2 =** In the Customer Detail Page, click on the Opportunities TAB in the Customer Detail Section



Â to open up the New Opportunity Page.

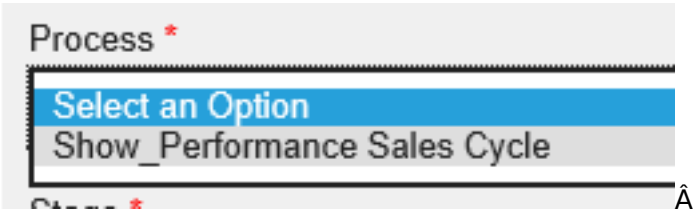
2. In the Add Opportunities Page (New Opportunity)
    1. Check that the customer is displayed correctly in the **Select Customer Field**



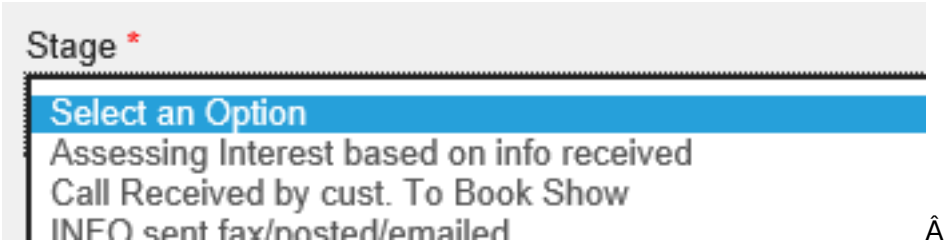
Important: If the name is not correct, either search for it by clicking on the name field and doing a search or cancel page and start again.
    2. In the 

Â field enter a name for this opportunity for you to know what it means.Â ***Eg: Book Colonial Show for June 18, 2016***

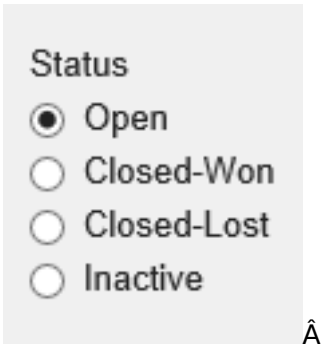
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3. In the 

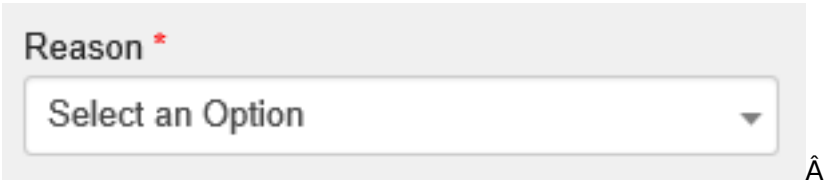
Â field select the Cycle you are allowed to work with.Â Based on your permission levels you will see different cycles here. Select the one best for you.

4. In the 

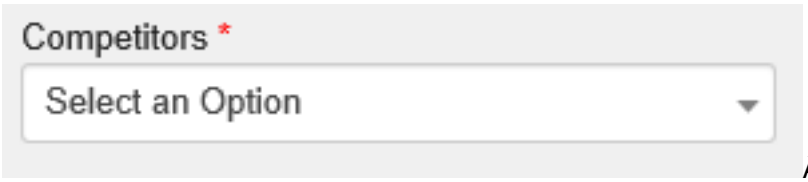
Â field select the stage this opportunity for this customer is at.

5. Leave the 

Â field as Open as this is a New Open Opportunity. For information andÂ instructionÂ on what **Closed-Won** does or **Closed-Lost** or **Inactive** click on the related words to open a new page explaining each one.

6. **DO NOT TOUCH** 

Â field. For information and instruction on theÂ **Reason**s field box click here to read more.

7. **DO NOT TOUCH** 

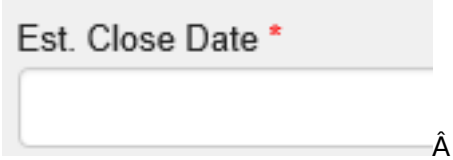
Â field. For more information and instruction on the **Competitors** field box click here to read more.

8. **DO NOT TOUCH** 

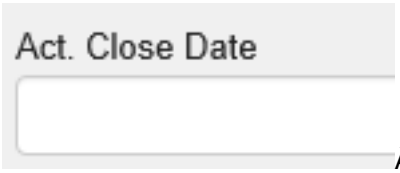
Â field as this.Â This is the date

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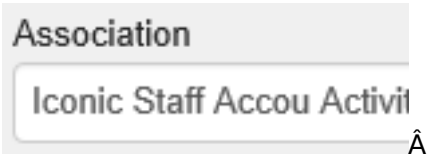
(today) of when you opened the New Opportunity.

9. In the 

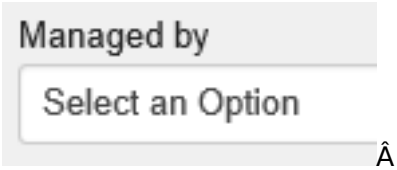
Â field click on it and select the estimated date that you believe you will close the opportunity.

10. **DO NOT TOUCH** 

Â field.
This field is the actual automated date created by the system when the opportunity has been closed either as a WON or LOST.

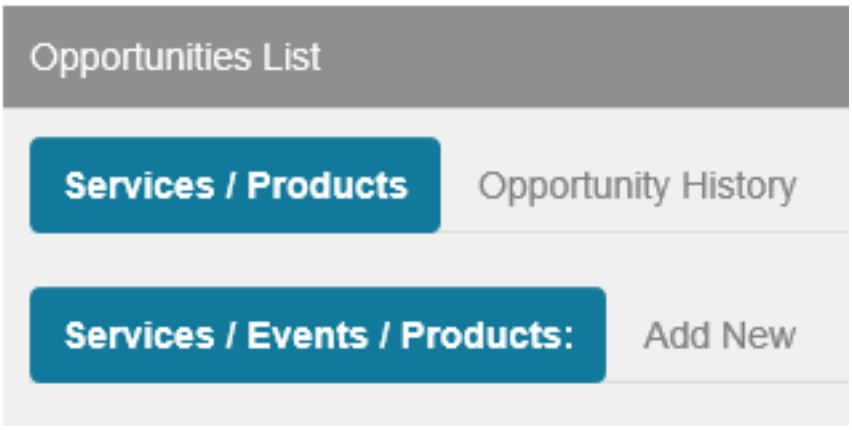
11. **DO NOT TOUCH** 

Â field.
The field associates the opportunity with the customer name, company and account page.Â It should never be changed.

12. In the 

Â field, select your name as the person who will manage this opportunity.Â If you are setting up this opportunity for someone else, you would enter their name.

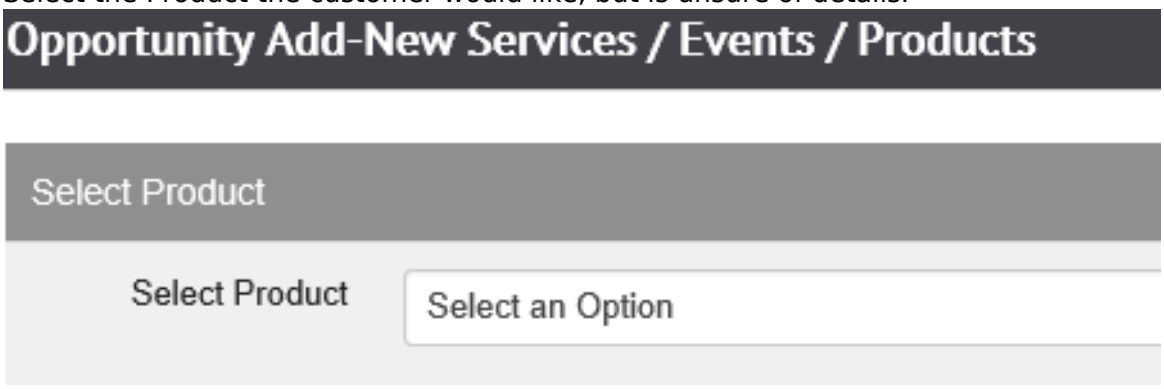
13. If the customer wants to tentatively book a show or is unsure and you know what product they would like but not sure of you then need to click on Add New Services / Events / Products.Â This is found at the lower end of the New Opportunity page in the Opportunities List section ...



14. When you click on Add New, a window will open up.

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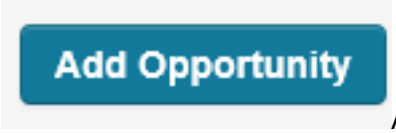
15. Select the Product the customer would like, but is unsure of details.



16. Complete all the fields for adding the product as per the field requirements as shown on the window.

17. When all fields are completed (to the best of the customer's knowledge) at this stage (remember that this is used where a customer is not sure of the details, tickets, dates etc).Â Press the 

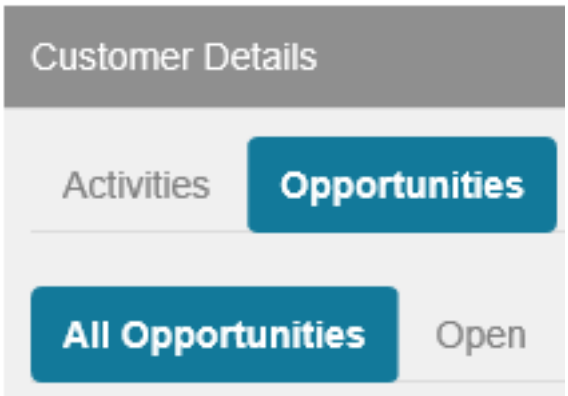
Â . If a customer is sure of the details than you would use the Add New Order process.
18. You have now completed a New Opportunity for a customer who was not sure of the details, date, ticket numbers or product options and need to call back or have a follow up call to confirm.

19. Press 

Â and the process is completed.

Â

When the customer calls back or you do a follow up call for this customer or a customer who has an opportunity schedule, all you need to do is click on the Opportunity Tab on the Customer Details Page.Â



Click on the Opportunity Name.Â This will open up the Opportunity in a new page.Â Then all you need to do is edit, change or Close the opportunity.Â

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Opportunities

Refer to "How do I close an open opportunity as won?Â How to change an Opportunity into a New Order or Booking?"

Attached files:

Unique solution ID: #1003
Author: Matthew Walker
Last update: 03-Feb-2016 01:37

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