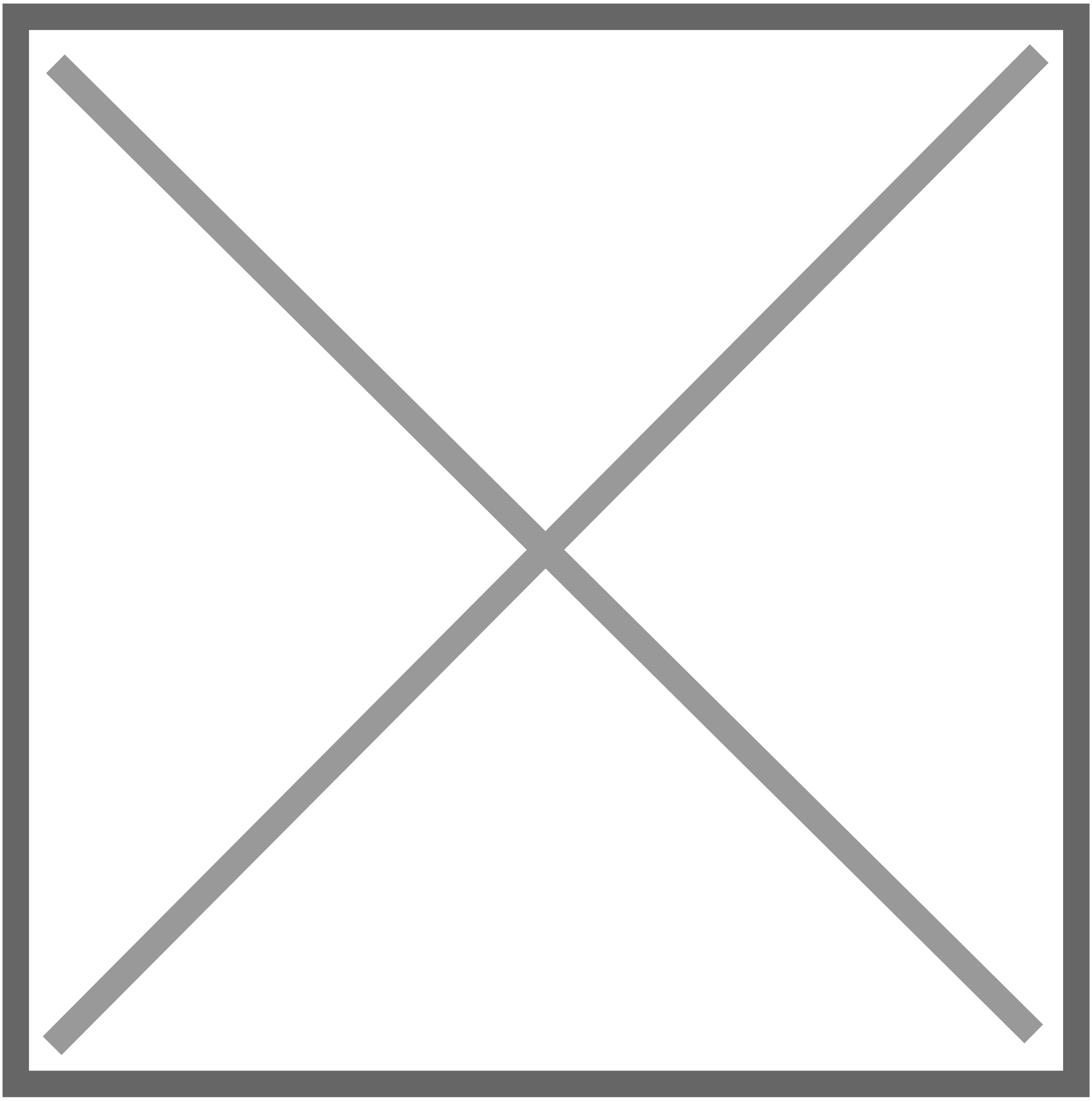
Opportunities

An Opportunity is a qualified Sales prospect with a likely chance that they will be able to do business with your company. You have established that they have buying power and have entered into the buying cycle. This module allows you to track your Opportunities throughout the Sales Pipeline until the deal is 'Closed Lost or 'Closed Won'.

Opportunities Actions You can access the Opportunities actions from the Opportunities module menu drop down or via the Sidebar. The Opportunities actions are as follows:

- **Create Opportunity** – A new form is opened in Edit View to allow you to create a new record.
- **View Opportunities** – Redirects you to the List View for the Opportunities module. This allows you to search and list Opportunity records
- **Import Opportunities** – Redirects you to the Import Wizard for the Opportunities module. For more information, see Leads Module Import.
- **Kanban View** – Visual workflow by opportunities sales stage (Prospecting, Qualification, Need Analysis etc.)

Note: Set the filter by changing kanban settings using Settings icon on the top right side



- Use **Filter** for Search of records - Quick filter and Advanced filters

Note: Refer [Quick filter of Leads.]

- **Recently viewed** records displayed in the side nav bar.
- Saved filters list showing inside nav bar as **My Filters**
- **Favorite** records of Opportunities would be displayed in the side nav bar. (From a detailed view of records, selecting the star beside the title undergoes a record into the favorite's list.)
- **Column Chooser** — The Column Chooser allows you to customize which columns are displayed in the list view by showing or hiding specific fields.

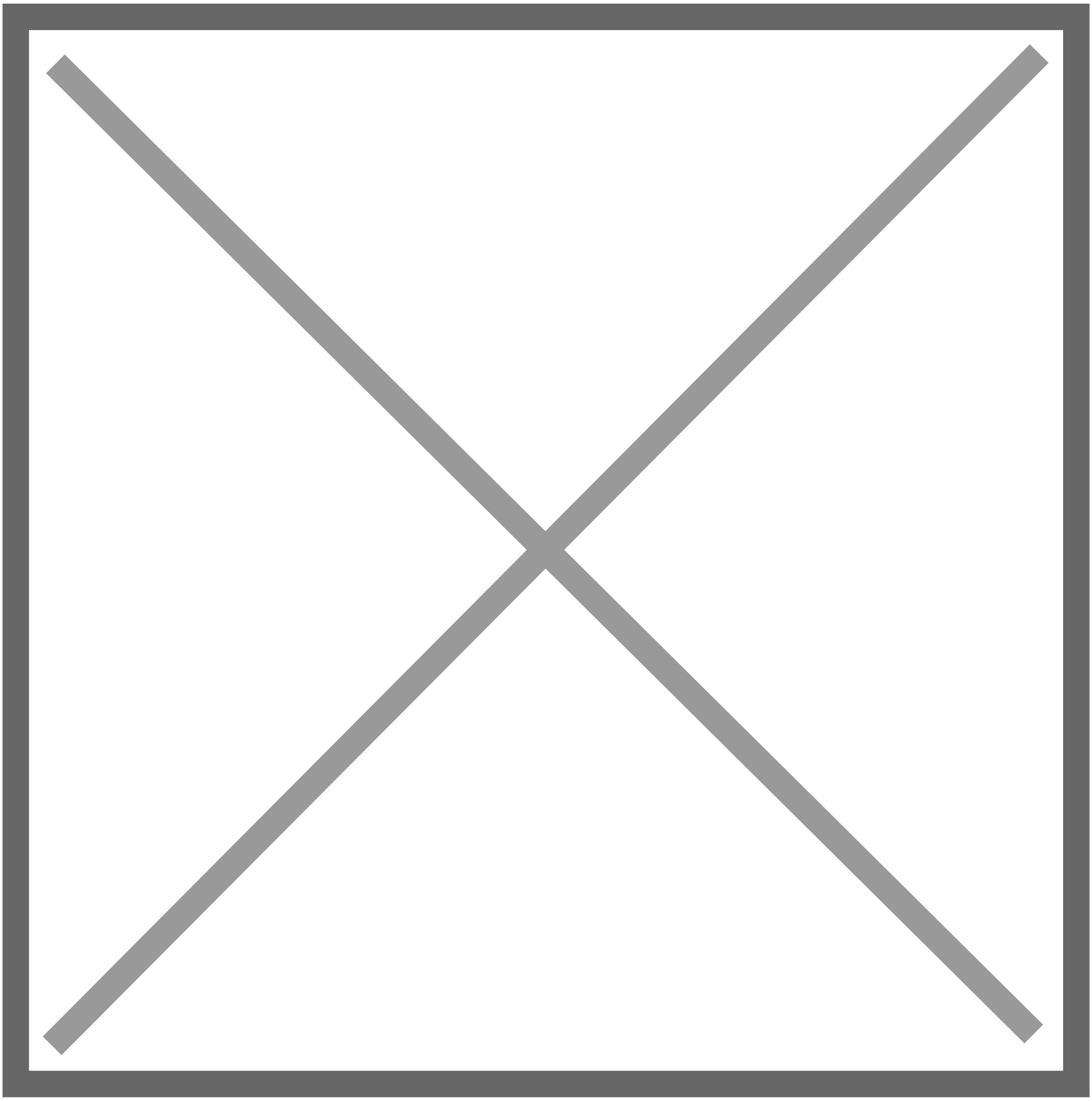
Note: Refer Leads module for Colum Chooser.

- To sort records on the Opportunities List View, click any column title which is sortable. This will sort the column either ascending or descending.
- To search for an Opportunity, Use Search engine on top.

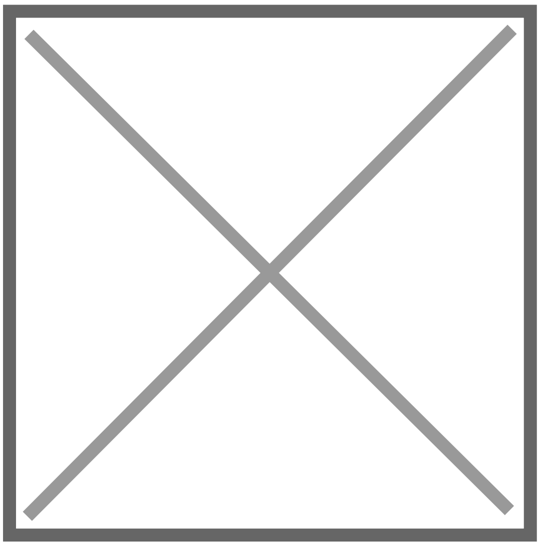
Opportunities Sales Stage

- Easily identify Sales Stage type with colored labels

  Prospecting, Qualification, Needs Analysis, Prospecting etc.



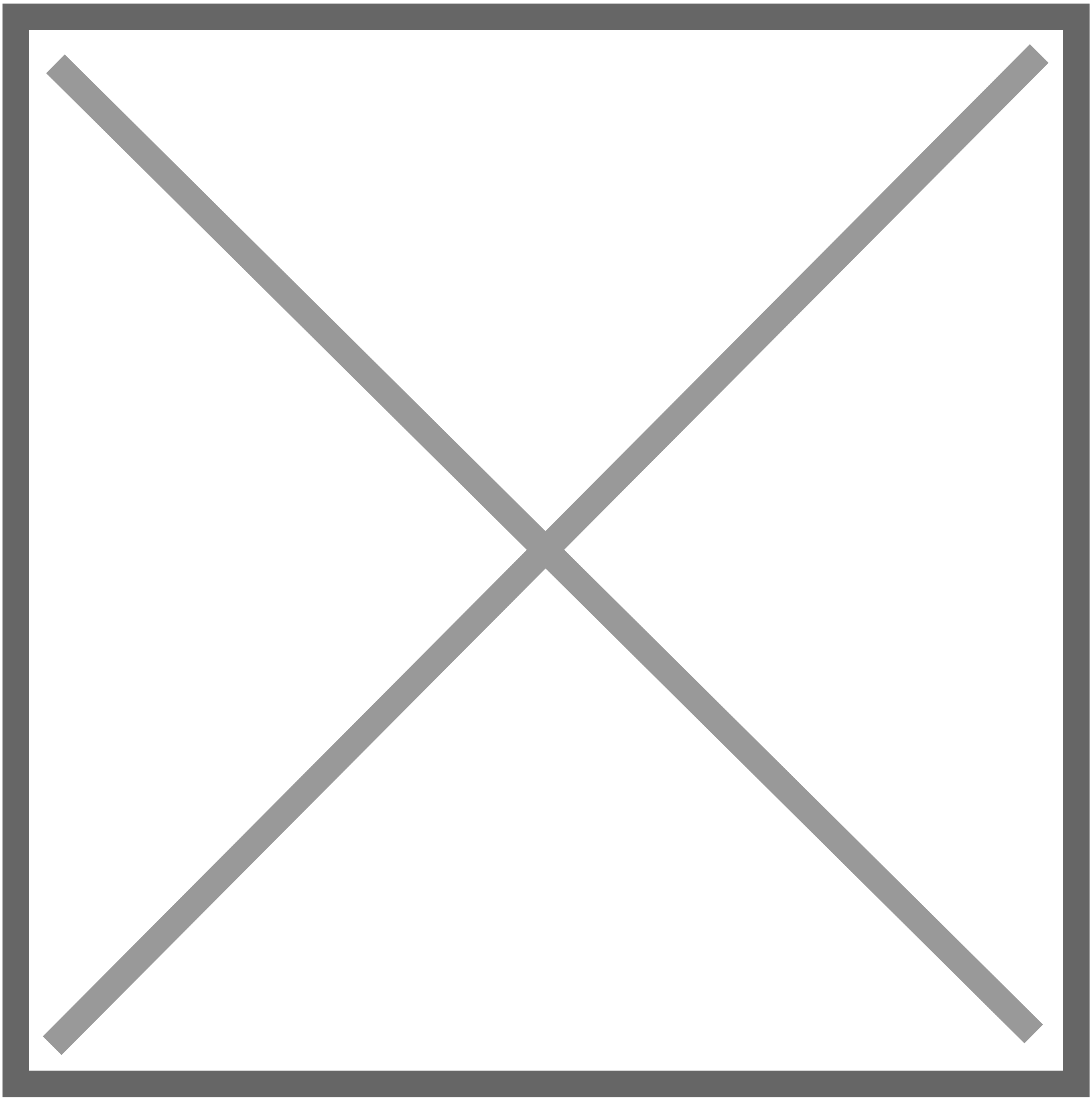
- Clicking on the pencil icon on Opportunities list view page to the display of record edit view.
- ‘i’ icon in the Opportunities list view page gives the additional details of the Opportunity.



Bulk Actions

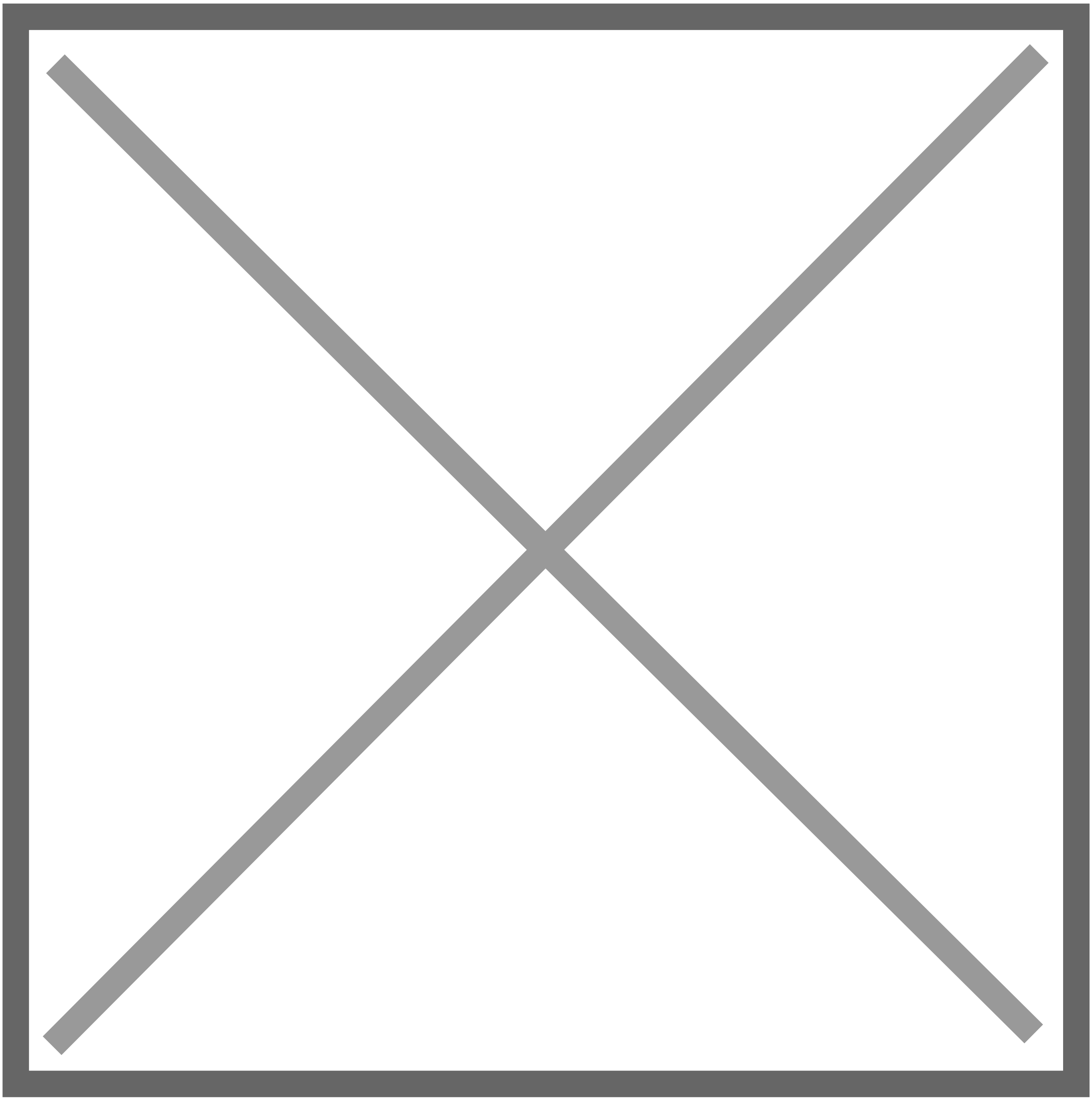
In Companies list view, there are some groups of actions which can be done by selecting group of records wish are as follows:

- **Mass Update**: Apply changes to multiple opportunity records at once.
- **Merge**: Combine duplicate or similar opportunity records into one.
- **Export**: Download the selected opportunity data in a preferred format (.CSV).
- **Map**: View the geographical location of opportunities on a map.
- **Delete:** Remove selected opportunity from the system.



Detail View Actions

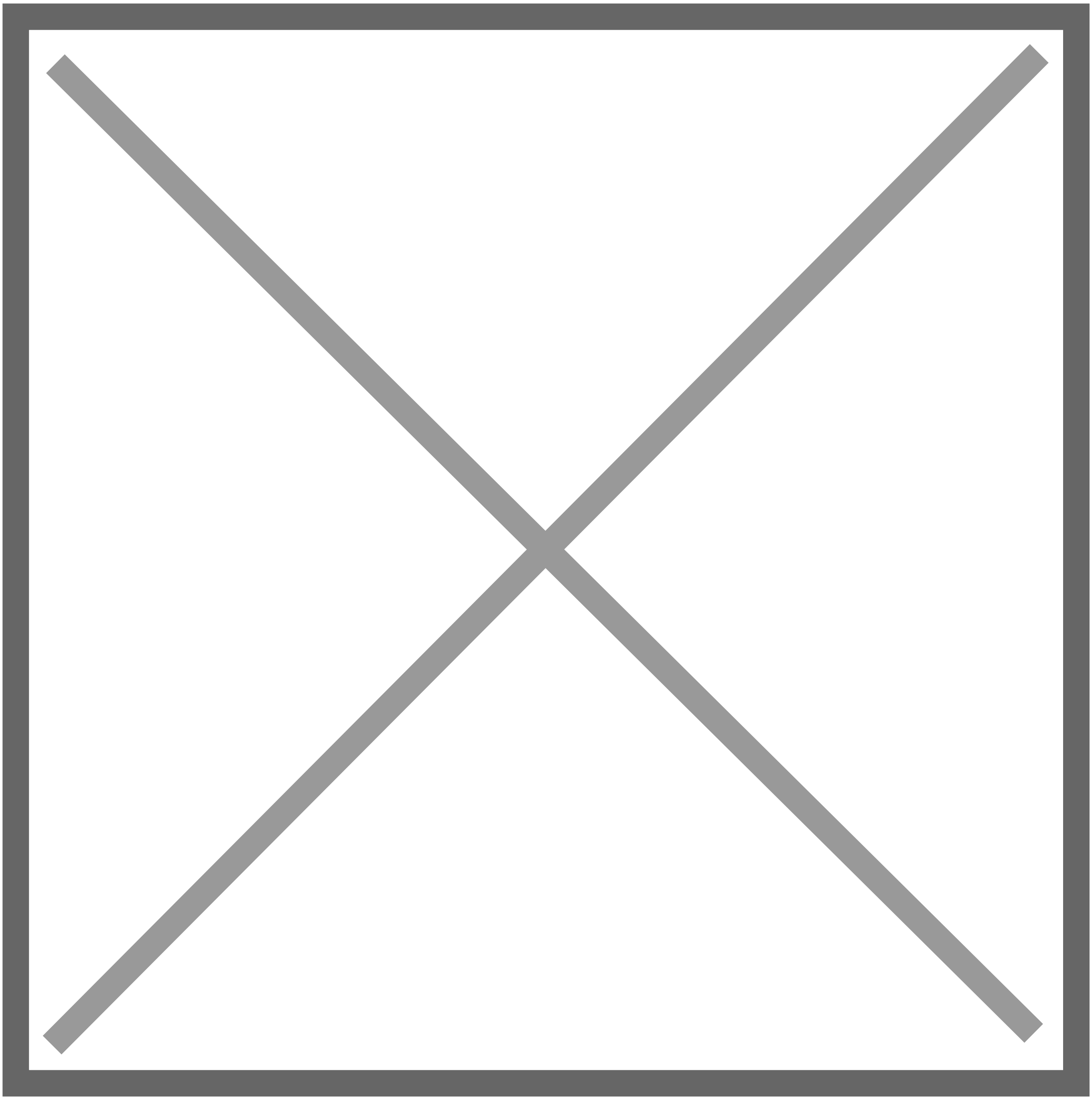
The Opportunities Detail View shows key info about a sales deal, including company, amount, stage, close date, and assigned user. It links to related modules and offers quick actions like edit or delete. Detailed view of a record highlights the sales stage with colored label of sales pipeline.



- **Edit –** Modify the opportunity's existing information.
- **Duplicate –** Create a new opportunity by copying current opportunity details.
- **Delete –** Permanently remove the opportunity from the system.
- **Find Duplicate –** Scan and identify possible duplicate opportunity entries.
- **View Changelog –** Review the history of changes made to this opportunity.

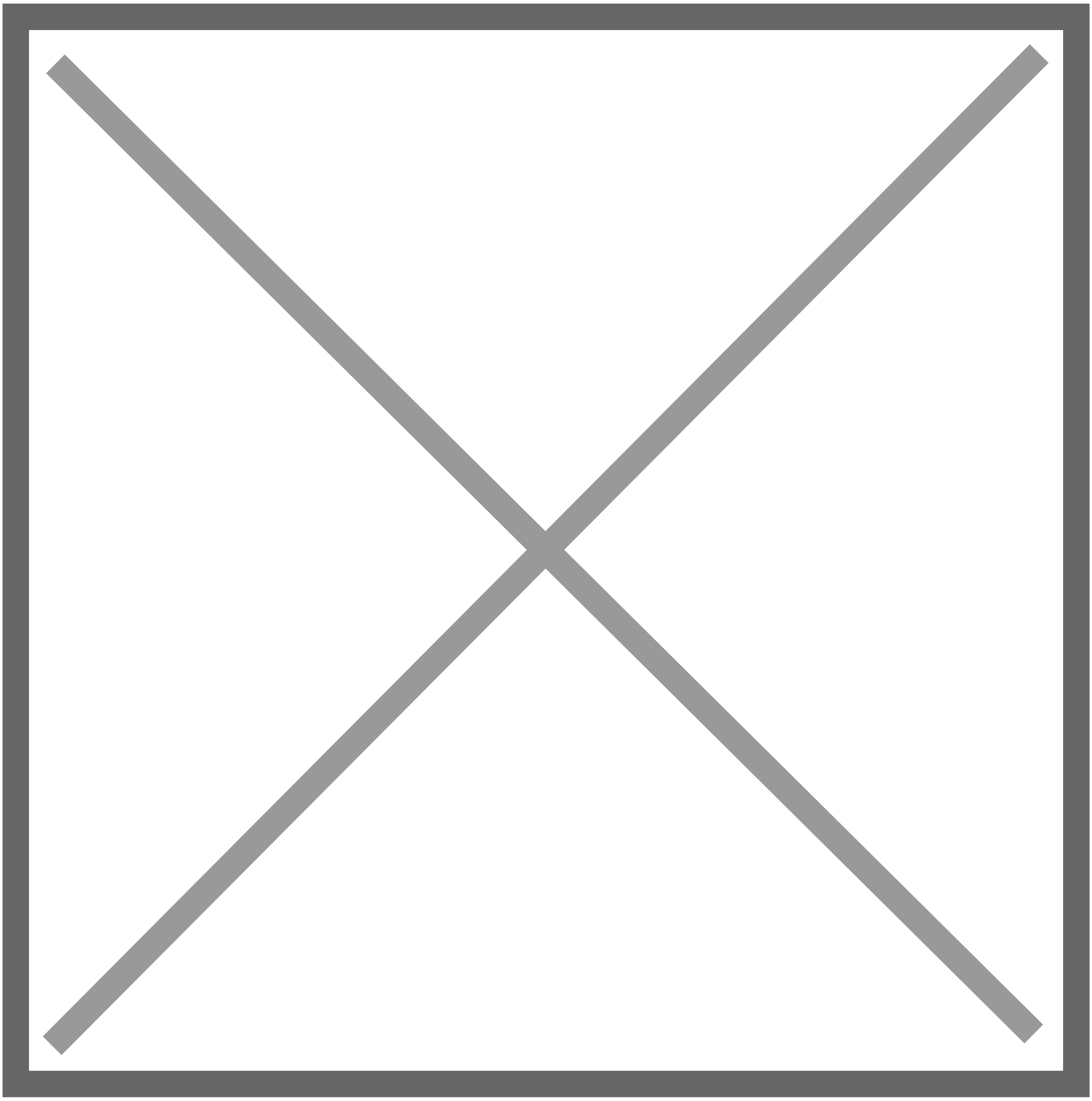
Opportunity’s Activity Management

The Activities tab in the Opportunities module lets users create and manage tasks like meetings, calls, and emails related to a sales opportunity, helping track all interactions in one place. Navigate to a detailed view page to view Activities.



Opportunity’s History Management

This menu allows users to archive emails, view a summary of activity, or apply filters to refine historical data. Navigate to a detailed view of a record to view History.



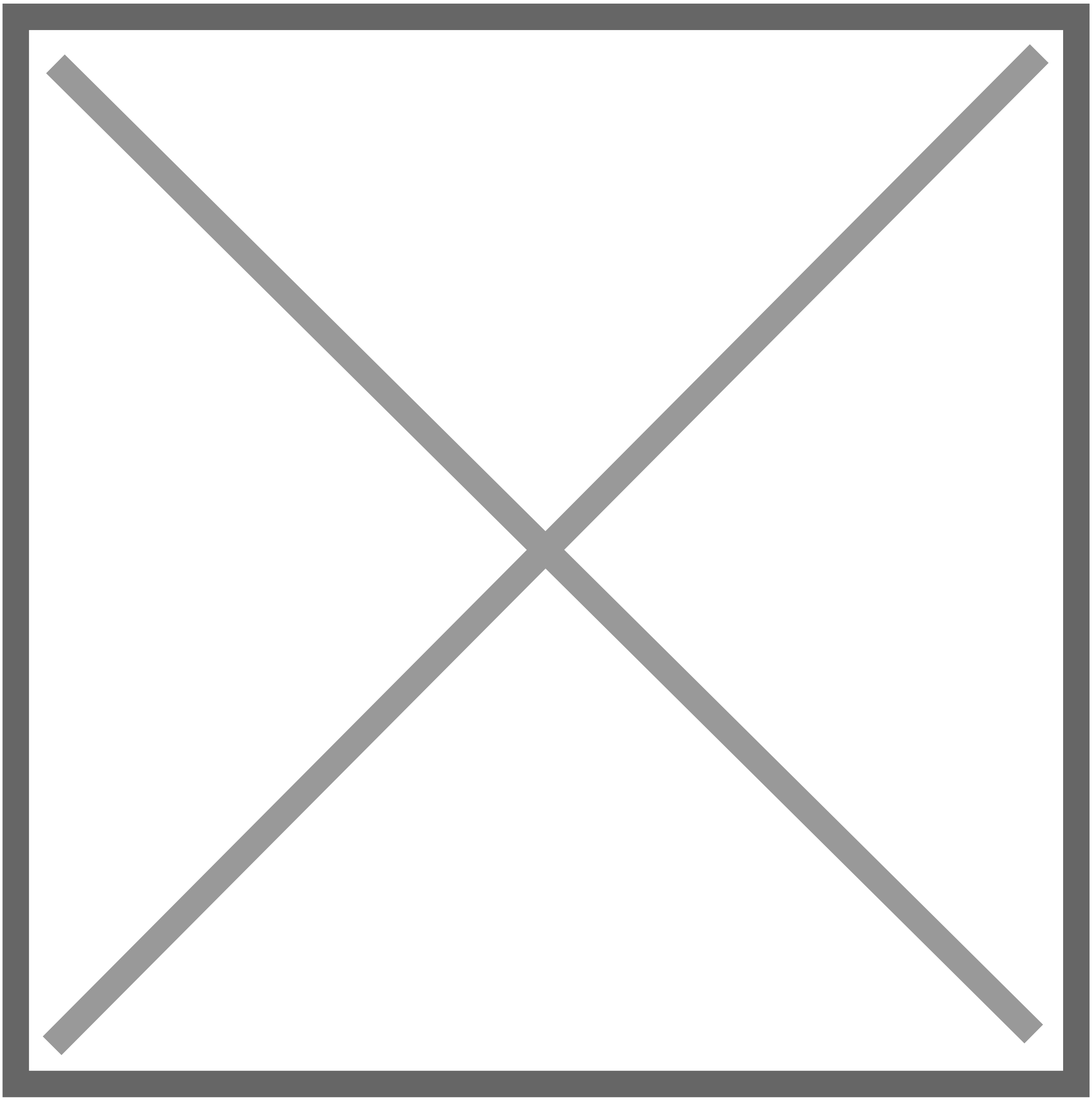
Submodules

Click on detailed view of a records to and navigate to submodules:

Documents

The Documents submodule under Opportunities stores and manages all related files, such as proposals, contracts, presentations, and supporting materials. It ensures easy access, version control, and centralized documentation for each sales opportunity.

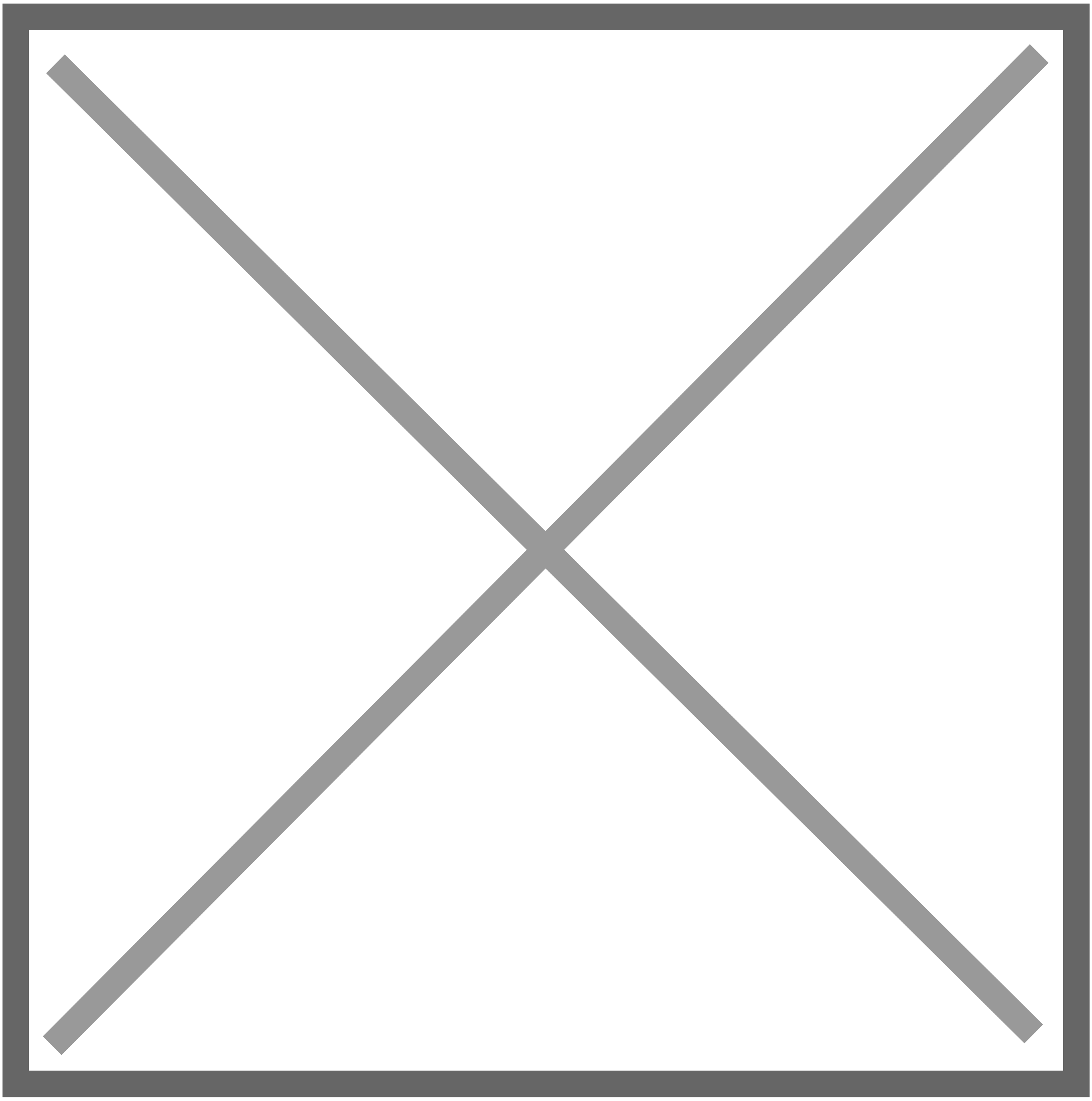
Can create a new one or select from existing records.



Contacts

The Contacts submodule under Opportunities links key individuals involved in the sales process. It helps track communication, roles, and relationships, ensuring effective engagement and follow-up with decision-makers or influencers.

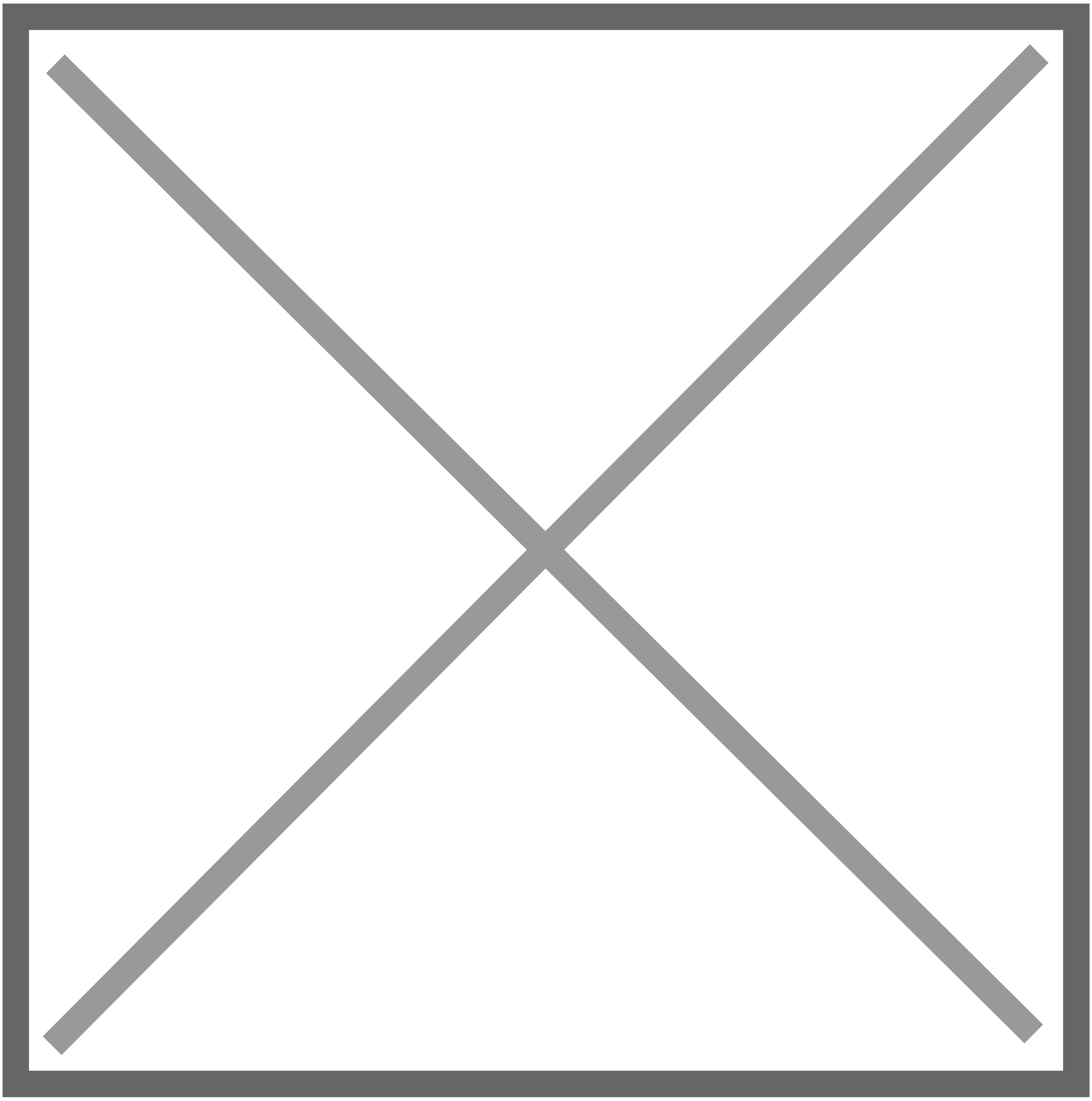
Can create a new one or select from existing records.



Leads

The Leads submodule under Opportunities connects potential customers to a specific sales opportunity. It helps track lead sources, engagement history, and progress, supporting effective conversion from interest to deal.

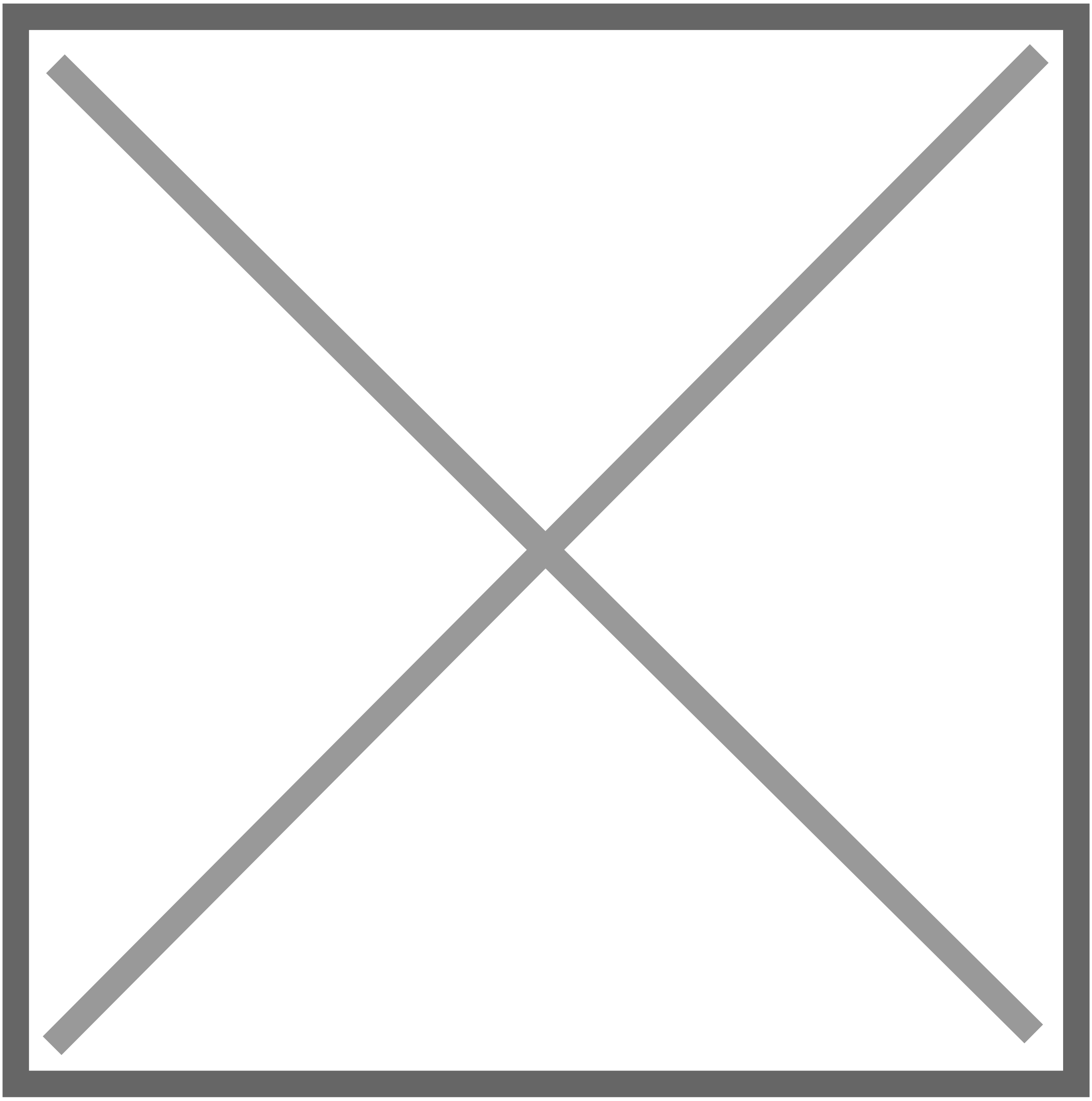
Can create a new one or select from existing records.



Projects

The Projects submodule under Opportunities links related projects to a sales deal. It helps track project timelines, tasks, and deliverables, ensuring smooth execution if the opportunity is won and converted into a project.

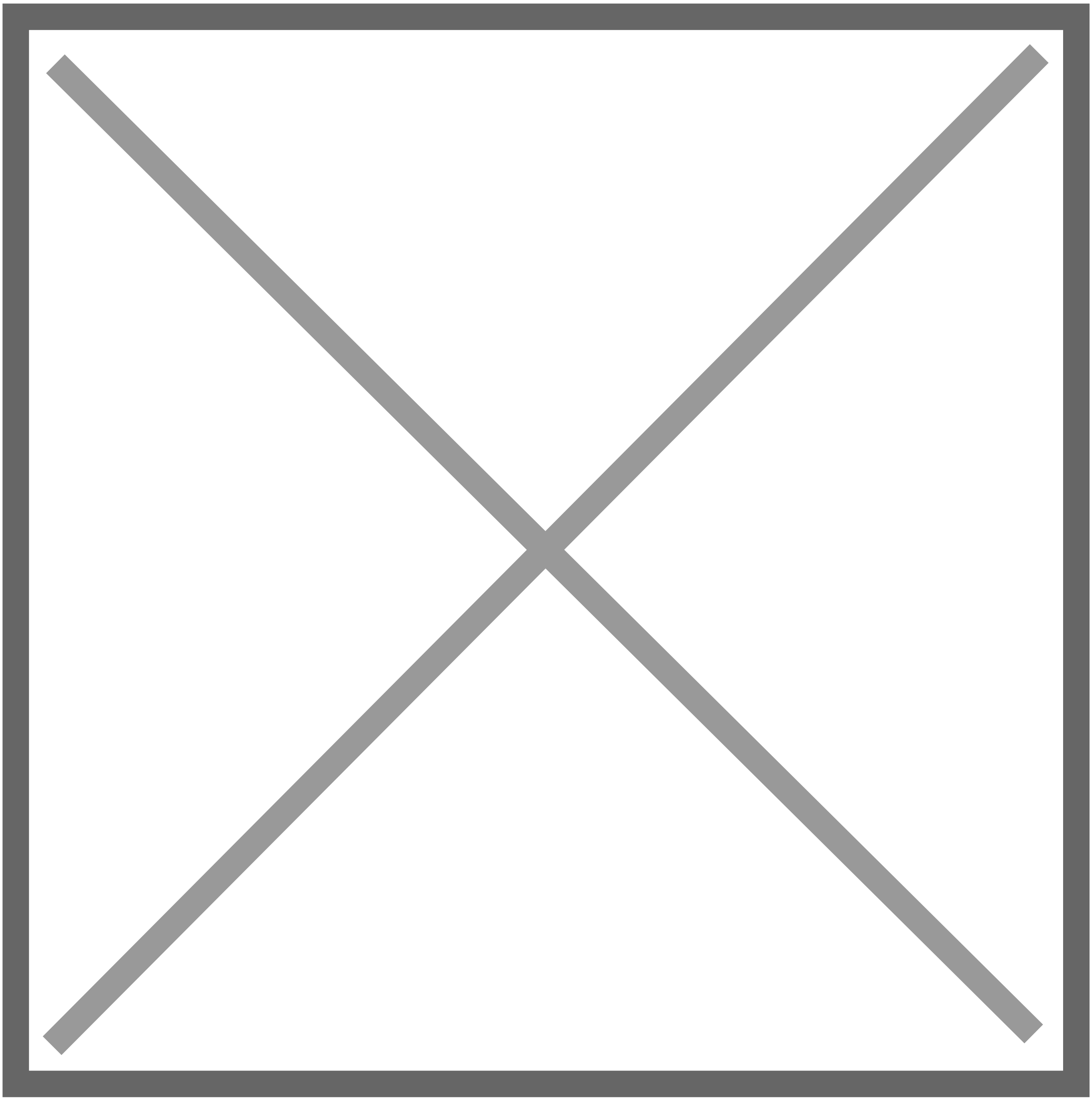
Can create a new one or select from existing records.



Quotes

The Quotes submodule under Opportunities stores price estimates or proposals related to the sales deal. It allows users to create, manage, and track quotes, helping streamline the transition from opportunity to confirmed sale.

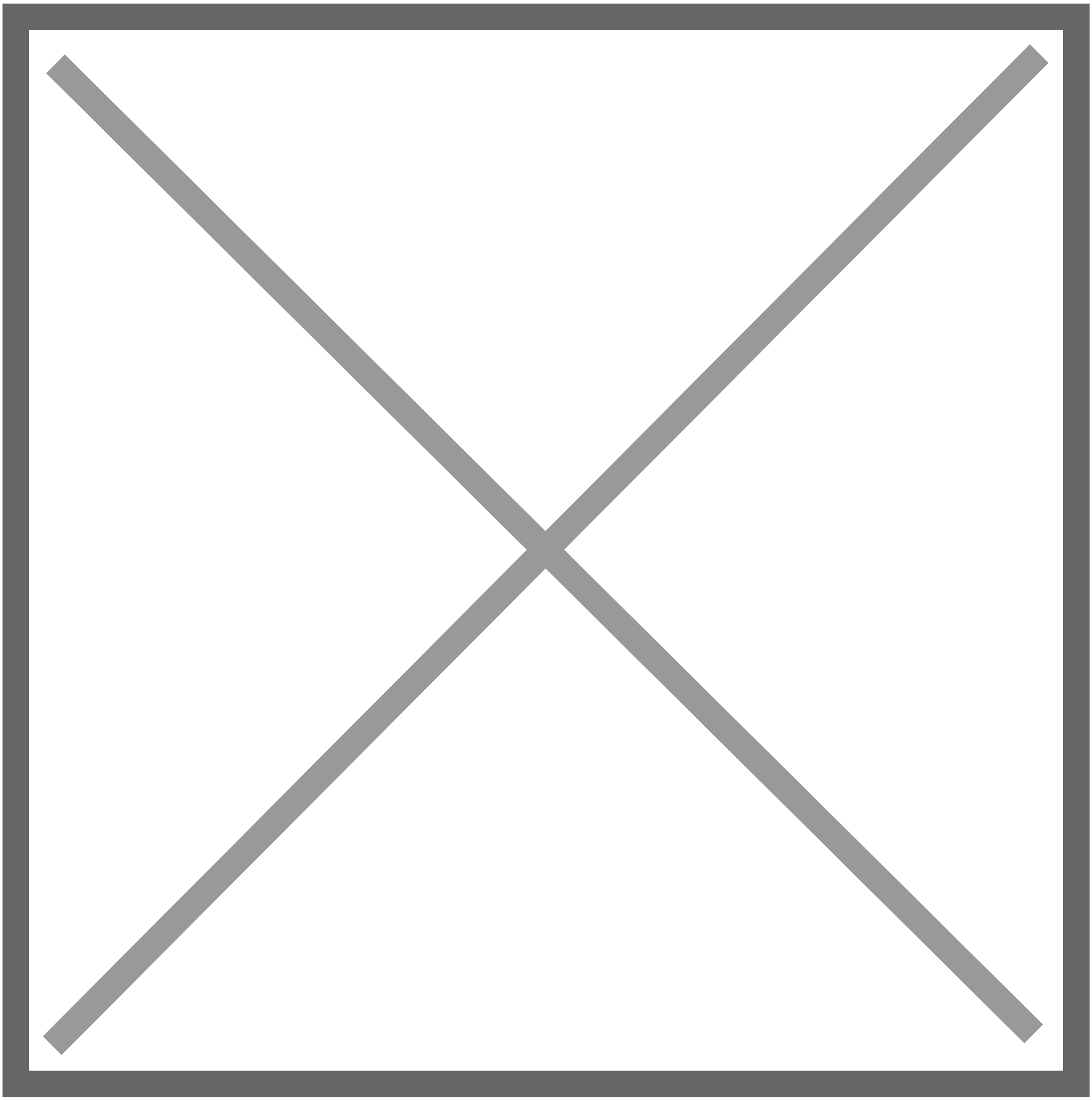
Can create a new one or select from existing records.



Contracts

The Contracts submodule under Opportunities manages agreements linked to the sales deal. It helps track contract terms, statuses, and renewal dates, ensuring smooth handoff and compliance once the opportunity is closed.

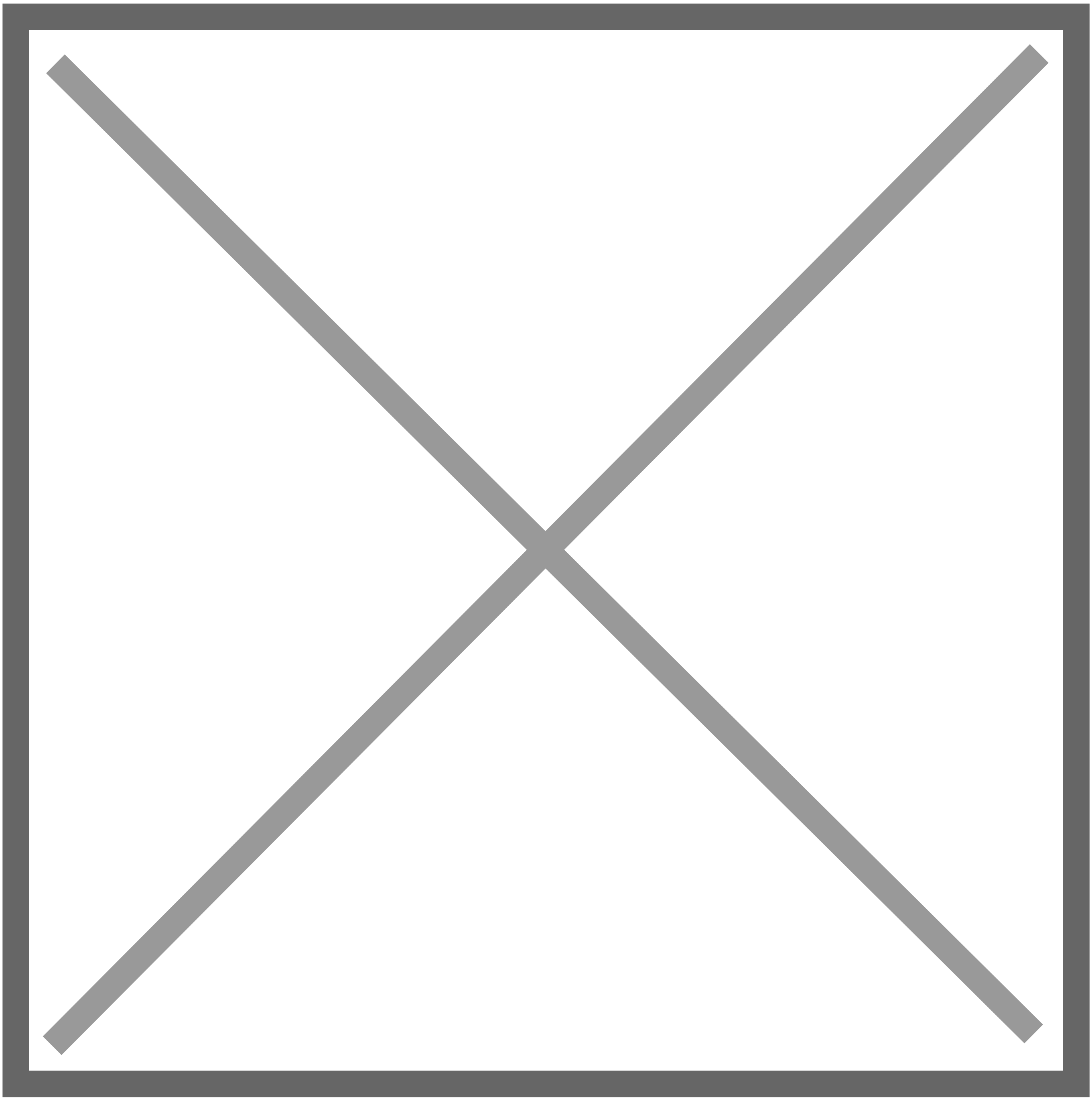
Can create a new one or select from existing records.



Security Groups

The Security Groups submodule under Opportunities controls access permissions for users based on their roles. It ensures that only authorized users can view or modify opportunity details, enhancing data security and confidentiality.

Can select from existing records.



Note: --Edit view, Detail view and list view form fields and layouts can be customized as per requirement using Administration Settings. Submodules also Customized as per usage.

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