SedonaOffice
The #1 Financial Software for Security Companies

Sales Management

SedonaOffice Version 5.3

Last Revised:

December 16, 2009

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Sales Management Overview

The Sales Management module provides a tool for tracking sales leads and the dollars values that have been quoted by using *Prospects* and *Opportunities*.

A *Prospect* is the person or business to whom a Salesperson trying to sell a system or services. An *Opportunity* is what the Salesperson is trying to sell to a Prospect. Your company may have an unlimited number of Opportunity records for each Prospect record and track each one separately until closed or lost. If the salesperson is successful in closing the sale with the Prospect, the Prospect record may be turned into a Customer, Site and Job. The application also tracks lost business through the resolution of each Opportunity where the User may record the reason for losing the business and who the competition was for the quote.

Functionality is built in to be able to track significant steps in the sales cycle from beginning to end; this tracking is found in the Prospect Note Log. The Prospect record also contains a *Qualifications* form where your company may capture information related to the Prospect. This form is completely user definable to meet individual company requirements.

If your company has purchased QuoteWerks or WeSuites quoting software, Prospects may be used to gather initial information about the Prospect within SedonaOffice, then push out the information to QuoteWerks or WeSuites to build the quote and present proposals to the Prospect. Once the sale is closed, the information from QuoteWerks or WeSuites is brought back into SedonaOffice to create the Customer, Site and Job records.

For information and instructions on how to use Prospects & Opportunities, refer to the topics below (page numbers are in parenthesis).

Related Setup Tables

Below is a list of the setup tables and options impacting the Sales Management module. Refer to SedonaSetup found within the SedonaOffice Online Help for details on each setup table and option listed below.

Competitors

Event Type

Lead Source

Quote Type

Resolutions

Sales Department

Sales Department Maintenance

Sales Items

Status

User Definable Fields / Tables

User Group Security Options

For a User to be able to use various options within the Sales Management module, certain security privileges must be granted to the User through the User Group Security options within SedonaSetup.   The following User Group Security options located within Application Access/QT security options section pertain to Sales Management.

Opportunities - Allows a User access to the Opportunities List.   Will be able to create, edit and delete Opportunities.

Prospects - Allows a User access to the Prospect List.   Will be able to create, edit and delete Prospects.

Master User - Allows the User to have access to the Prospect & Opportunity records of all salespersons; does not need to be setup with an employee type of SL (salesperson).

Prospect Flow Charts

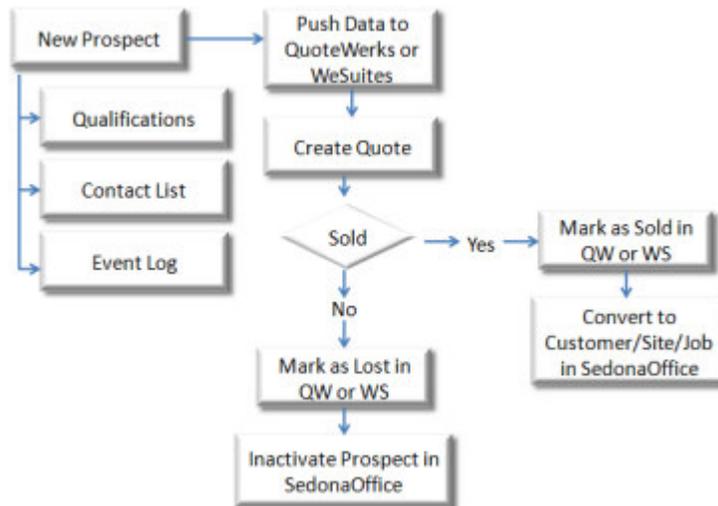### Prospect & Opportunity Flow Chart

Below is the typical data flow when using Prospects and Opportunities.
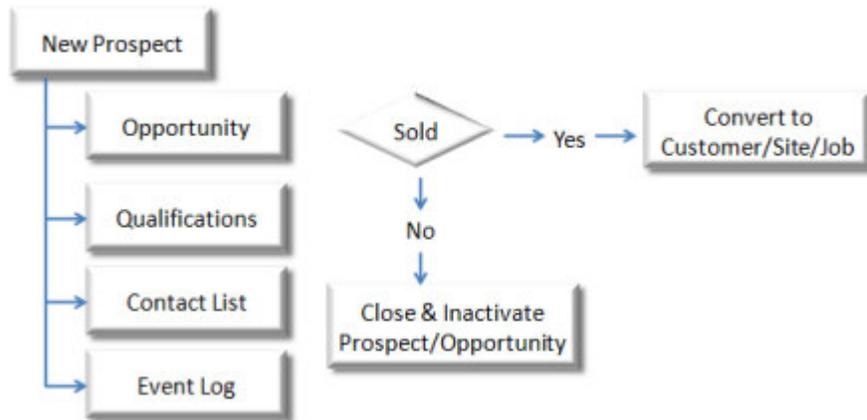
ss9004

Prospect / QuoteWerks Flow Chart

Below is the typical data flow when using Prospects and either QuoteWerks or WeSuites.

ss9005

Prospects Overview

The Sales Management module provides a tool for tracking sales leads and the dollar values that have been quoted by using *Prospects* and *Opportunities*.

The *Prospect* is the person or business to whom a Salesperson trying to sell a system or services.   A Prospect record is used to record basic information about the Prospect and contains other sub-forms available for tracking related information.   These sub-forms are Qualifications, Contacts, Notes and Opportunities.   The Prospect form and each of the sub-forms are defined on the following pages.

Prospect Form Definitions

The following pages will describe the layout and the data entry fields contained on the *Prospect Entry* form.   For detailed instructions on creating a new Prospect refer to the topic: **How to Create a New Prospect**.

9000.1

The Prospect form contains fields where data is manually typed in by the User and fields where a selection must be made from a drop-down list of choices.   The choices that appear in the drop-down lists are controlled by the values maintained in SedonaSetup. Several function buttons are located at the lower left of the Prospect form.   These function buttons will be described after the data entry field definitions.   The Apply button located at the lower right of this form is used to save the information entered on the form.   If all required fields have not been filled in, the User will be presented with a message as to which field is still required to be able to save the information.

Prospect Form Data Entry Fields

Inactive - This option is used to inactivate a Prospect.   Once a Prospect has been inactivated, it will disappear from the Prospect Queue.   A Prospect may be reactivated at a later time if necessary.

Residential or Commercial - Select the appropriate radio button that applies to the Prospect.   If the Commercial option is selected, an additional field will be displayed to enter the name of the Company.   This is a required field.

Company - If the Commercial radio button was selected, enter the name of the Company.

Name - For Residential type Prospects, enter the Last Name, First Name.   If the Commercial type radio button was selected, enter the primary contact name for the company.

Address - Press the address button to enter the address of the Prospect.   After entering the street address information, tab to the Zip Code field.   Enter the Zip Code then press the tab key.   The City and State will automatically fill in.

Status - Select the Prospect Status from the drop-down list.   This describes where the Prospect is in the Sales cycle.   This field is manually updated by a User as the Prospect moves through the sales cycle.

Source - Select the Lead Source from the drop-down list.   This describes how the Prospect heard about your company.

Re-Flag - Selecting this option will open two additional fields on the Prospect form; *As Of* and *Re-Flag Status*.   Marking a Prospect as a Re-flag will remove the Prospect from the Prospect Queue.   The Prospect will return to the Prospect Queue on the date specified in the As Of field and the Prospect Status will be set to the Re-Flag Status selected.   When a Prospect is set for Re-Flag, it is moved into a separate Re-Flag Prospect Queue.

This option is typically used if the Prospect is interested in a quote from your company but will not be ready for several weeks or months in the future.

Phone 1 - The primary telephone number for the Prospect.

Phone 2 - The secondary telephone number for the Prospect.

Mobile - The mobile telephone number for the Prospect.

Pager - The pager number for the Prospect.

Fax - The fax number for the Prospect.

Email - The email address for the Prospect.   Entering an email address will make available other functions for the Prospect such as sending an email, creating a Vcard or scheduling an appointment through Microsoft Outlook or other supported email applications.

Prospect Form Data Entry Fields (continued)

Sales Department - Select the Sales Department to which the Prospect is being assigned.

Salesperson - Select the Salesperson being assigned to the Prospect from the drop-down list.

2nd Salesperson - If a second salesperson is also working on the Prospect, a second Salesperson may be selected from the drop-down list.

Next Follow Up - Enter a date indicating the next time the Prospect needs to be contacted. Follow up dates are listed in the Prospect List (Prospect Queue).

Comments - This is a free-form text field to enter important information related to the Prospect. This field has a 256 character limit.
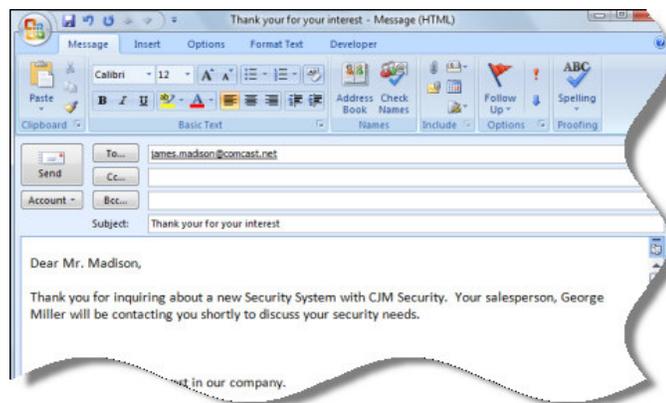
Prospect Form Function Buttons

There are five function button located at the lower left of the Prospect form; these buttons have links to Microsoft Outlook and MS Word functionality.   To be able to use any of these functions, the workstation must have Microsoft Outlook and MS Word installed.

Email Button - This option button is only available if an email address was entered on the Prospect form.   Pressing this button will open the Prospect *Email* form.   The User will enter information into the *Subject* line and the *Summary* text box.   Selecting the option *Add Summary to Email* will add the typed information into the Outlook email to be sent to the Prospect.   Any information entered into the Summary text box will automatically be saved to the Prospect Notes. After filling out this form, the User will press the *Send* button located at the lower right of the form; this will open a new Outlook Message form.   The User may add additional information into the email, then send to the Prospect.
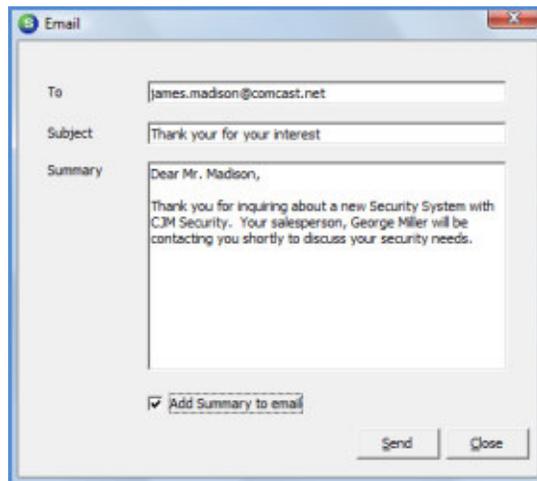

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Prospect Form Function Buttons (continued)

Mail Merge Button - Pressing this button will open the Windows File Explorer to locate a previously saved Mail Merge Template letter.   Once a template letter is selected, it will fill in with information from the Prospect record, and then the letter may be printed.   This option is typically used to send a "Thank you for your interest" letter to the Prospect.

vCalendar Button - If this button is pressed, MSOutlook will open to the new Appointment form.   The appointment subject will fill in with the name of the Prospect, and any information typed into the Prospect Comments field will fill into the body of the appointment form.   The User may schedule the appointment and save.
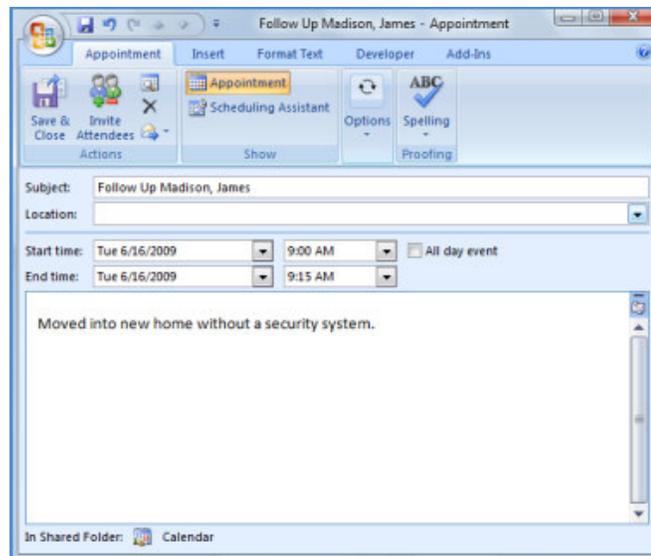
ss9014

Prospect Form Function Buttons (continued)

Create vCard Button - Selecting the option button will open a new Outlook Contact form. Information entered into the Prospect form will automatically fill into many of the fields on the Outlook Contact form.   Any information typed into the Prospect Comments field will fill into the Outlook Contact Notes field.

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Prospect Form Function Buttons (continued)

Import | **Import Button** - This function button is only available when creating a new Prospect.   This option is used to import information from an Outlook Contact into the Prospect form.   Pressing this button will open the Outlook Contacts form.   The User will select a name from the contact list then press the *Save* button.   Many of the fields from Outlook Contact information will automatically fill into the Prospect form.
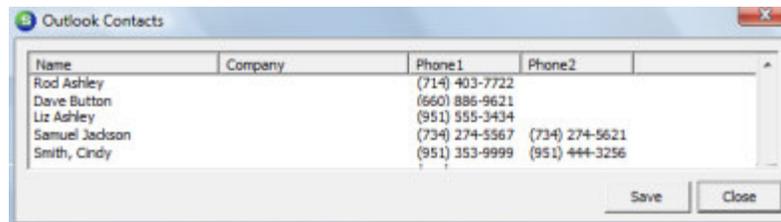
9002

Apply | **Apply Button** - This button is used to save information.   If a new Prospect is being entered and the User presses the Apply button before filling in all required fields, the User will be notified with a message box indicating which field information is missing.

Qualifications Form Definitions

The *Qualifications* form is displayed on the Prospect toolbar once the Prospect form has been saved. All data entry fields contained on the Qualifications form are User Defined.   This means that your company determines which fields will be used and what description label for each filed will be displayed on the form.   This form is used to gather additional information related to the Prospect that will assist the Salesperson when making the initial telephone call to the Prospect.   The field labels are assigned in SedonaSetup.   The use of this form is optional but highly recommended.

Below are examples of how to use some of the fields on the Qualifications form.


9003

Contacts Form Definitions

The *Contacts* form is displayed on the Prospect toolbar once the Prospect form has been saved. The Contacts form is used to create a list of contacts relevant to the Prospect.   The User may enter as many contact records as needed.

The *Contacts* form is comprised of data entry fields and function button located at the bottom of the form.   These function buttons operate the same as the function buttons on the Prospect form. For definitions of each function button refer to the *Prospect Form Definitions* topic earlier in this document.

All data entry fields contained on the *Contacts* form will be described below.

Name - Pressing the Name button will open the *Contact Name* form where the User will enter the name information for the contact being created or edited.
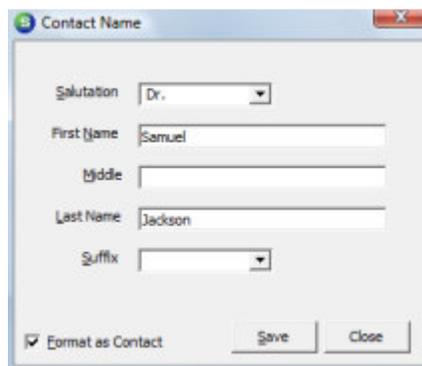
9004

Title - Enter the title for the Contact such as homeowner, manager etc.   This field is optional.

Address - Press the address button to enter the address of the Contact.   After entering the street address information, tab to the Zip Code field.   Enter the Zip Code then press the tab key.   The City and State will automatically fill in.

Email - The email address for the Contact.   Entering an email address will make available other functions for the Contact such as sending an email, creating a Vcard or scheduling an appointment through Microsoft Outlook.

Notes - This is a free-form text field to enter important information related to the Contact.   This field has a 256 character limit.

Phone 1 - The primary telephone number for the Contact.

Phone 2 - The secondary telephone number for the Contact.

Mobile - The mobile telephone number for the Contact.

Contacts Form Definitions (continued)

Pager - The pager number for the Contact.

Fax - The fax number for the Prospect.

Global Contact - This option is used to flag a contact so that it may be linked to a different Prospect record.

9005

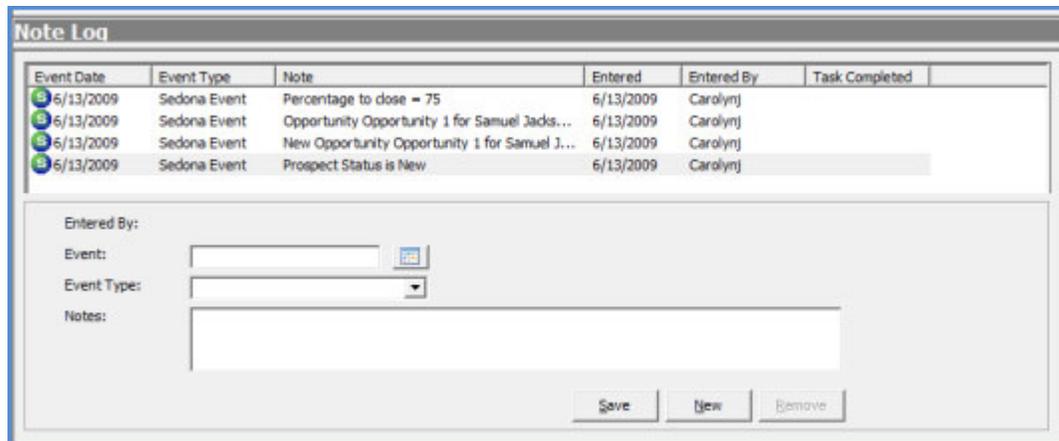## Note Log Definitions

The *Note Log* is used to track Events that have taken place with the Prospect throughout the sales cycle. SedonaOffice automatically tracks significant changes made to a Prospect or any Opportunities associated with the Prospect and enters records into the Note Log.   Users have the ability to manually enter in events that may have taken place or will take place with the Prospect. Changes that are automatically written to the log are listed below.

- Any change made to the Status field on the Prospect or Opportunity
- A new Opportunity is created.
- The % to close field on the Opportunity is entered or changed.
- The Primary Salesperson is changed.
- A Secondary Salesperson is entered or changed.
- An email is sent using the Email function button.
- An appointment is scheduled using the function button.
- A VCard is created using the function button.

The Note Log is divided into two sections; the Upper section is a listing of all Events automatically recorded by SedonaOffice and Manual Events entered by Users.   The lower section is used to enter a Manual Event for the Prospect.   The data entry fields for a Manual Event are described on the next page.

9007

Note Log Definitions (continued)

Manual Event Data Entry Fields

To add a new Event, the User will begin by pressing the *New* function button located at the bottom of the Note Log form.

Event - Enter or select a date from the calendar on which the event occurred or will occur.

Event Type - Select the appropriate Event Type code from the drop-down list.

Notes - The User may enter up to 1,024 characters of text into the Notes field.

Once information has been entered, the User will press the *Save* function button located at the bottom of the Note Log form.   The Manual Event will be displayed in the Events List.


9007

Documents Form Definitions

The *Documents* form is displayed on the Prospect toolbar once the Prospect form has been saved. Your company must be a subscriber to the add-on module SedonaDocs to be able to scan and attach or attach an existing document to a Prospect record.

Once the Prospect form has been saved, the User may press the *Documents* button on the Prospect Toolbar. To attach a document to the Prospect record, press the *New* button located at the lower right of the form then press *Add* or *Scan* button.

For detailed instruction on scanning and attaching or attaching an existing document to the Prospect, refer to the SedonaOffice Online Help / Client Management topic folder.
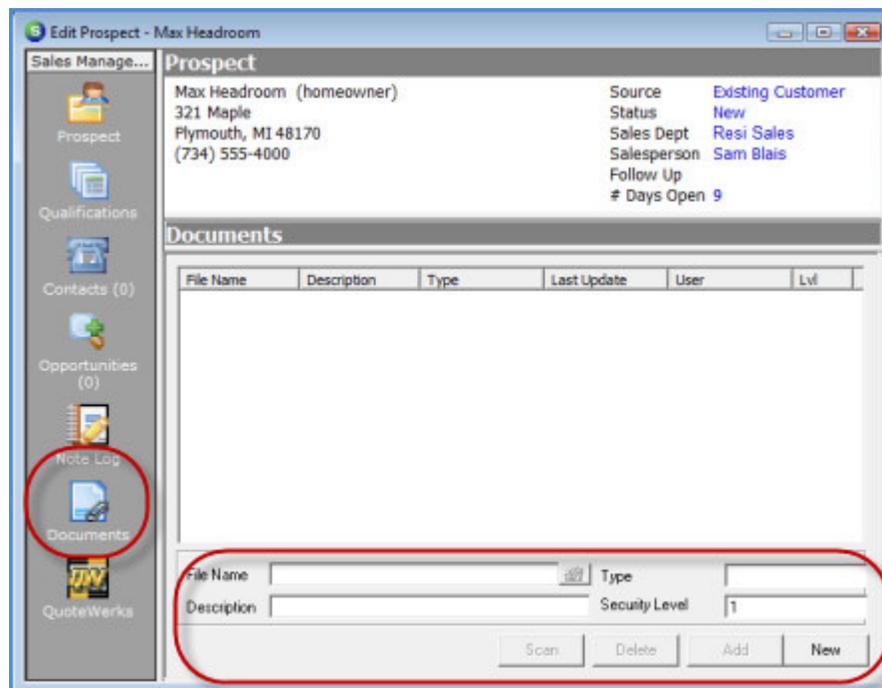
9012

Prospects List (Prospect Queue) - Definitions

The *Prospects List* which is commonly referred to as the *Prospect Queue*, is a listing of all Prospects in process.   As Prospects are sold or lost and inactivated, they drop off the list.   Once a Prospect has been inactivated, it still remains in the database.   Inactive Prospects may be viewed from the Prospects List by selecting the *Show Inactive* option.

The Prospects List contains columns of information in a grid with basic information related to each Prospect record, and has selectable filters located at the top of the form and contains function buttons at the bottom of the form.   The Filters are used to display a list of Prospects that meet the filter criteria selected.   For example if only the Prospects created with a particular lead Source are to be viewed, the User will make a selection from the Sources filter.   Only the Prospects with the lead Source selected will be displayed in the grid area.

At the lower right of the Prospects List is a count of how many Prospects are contained in the list currently being viewed.

Each column within the Prospect List, the Filter options and Function buttons will be described on the following pages.

ss9031

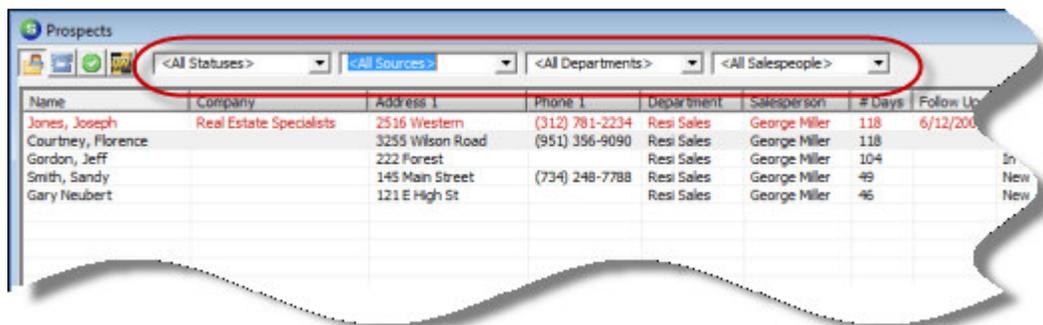**Prospects List Definitions (continued)**

Prospects List Filters

Each filter available is listed and described below.

Status - A Status is a required field on each Prospect record.   The Status is designed to describe where the Prospect is in the Sales Cycle.   The User may filter the Prospect list by selecting a single Status code from the drop-down list.   The default is All Statuses.   Your company creates the list of Statuses available for selection.   Status codes are created and maintained in SedonaSetup.

Source - The Source is a required field on each Prospect record.   The Source is designed to describe how the Prospect heard about your company.   The User may filter the Prospect list by selecting a single Source code from the drop-down list.   The default is All Sources.   Your company creates the list of Sources available for selection.   Source codes are created and maintained in SedonaSetup.

Sales Department - Each Salesperson is assigned to one or multiple Sales Departments.   When a new Prospect is created this is a required field.   Your company may have one or multiple Sales Departments.   The User may filter the Prospect list by selecting a single Sales Department from the drop-down list.   The default is All Sales Departments.   Your company creates the list of Sales Departments available for selection.   Sales Department codes are created and maintained in SedonaSetup.

Salesperson - Each Prospect is assigned to a Primary Salesperson and an optional 2nd Salesperson. This filter only works with the Primary Salesperson assigned to the Prospect.   The User may filter the Prospect list by selecting a single Salesperson from the drop-down list.   The default is All Salespeople.   If the Sales Management setup limits the User to see only their own Prospect records, this filter is not used.

ss9032

Prospects List Definitions (continued)

Prospects List Grid

The grid section of the Prospects List contains several columns of information; each column is described below.

Name - The name entered on the Prospect record is displayed in this column.

Company - This column is only displayed if the option at the lower left of the Prospect List, *Show Company Name*, is selected.   If the Prospect was flagged as a Commercial Type, the name of the Company entered on the Prospect record will display in this column.   This column will be blank for Residential Type Prospects.

Address 1 - This column displays the information entered into the Address Line 1 field of the Prospect record.

Phone 1 - This column displays the information entered into the Phone 1 field of the Prospect record.

Department - This column displays the Sales Department that was selected on the Prospect record.

Salesperson - This column displays the name of the Primary Salesperson entered on the Prospect record.

 # Days - This column displays the number of Days Old of the Prospect record.   The counter begins from the date the Prospect record was created.   If an older Prospect record is reactivated, the counter continues from the date the Prospect was originally created; this cannot be modified.

Follow Up - This column displays the current Follow Up date entered on the Prospect record.   If the Follow Up date is prior to today's date, the Prospect row will be displayed in a red font.

Status - This column displays the current Status of the Prospect record.

9008

Prospects List Definitions (continued)

Prospects Function Buttons

Several function buttons are displayed at the upper left of the Prospect List; each function button is described below.

Prospects - Pressing this button will display a list of all active Prospects.   If any filters were selected, the Prospects displayed in the grid will be those that meet the filter criteria.

Contacts - Pressing this button will display a list of all active Contacts.   If any filters were selected, the only the Contacts linked to the Prospects that meet the filter criteria will be displayed.

Re-flags - Pressing this button will display a list of all Prospects marked for Re-Flag.   If any filters were selected, only the Prospects that meet the filter criteria will be displayed.

QuoteWerks - This will only be displayed if the QuoteWerks application is installed on the workstation.   Pressing this button will launch the QuoteWerks application.
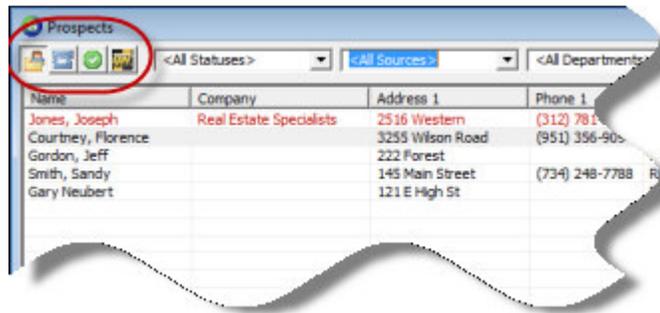
ss9035

How to Create a New Prospect

To create a new Prospect follow the instructions listed below.

1.   Navigate to the Sales Management/Prospect menu option from the Main Application menu.

2.   The list of *Prospects* will be displayed.   Press the *New* button located at the lower right of the Prospects List.

3.   The New Prospect form will be displayed.   The User will need to populate all required fields on the form before being able to save the record.   Once all data entry has been completed, press the *Apply* button to save.   For individual field definitions of the Prospect form, refer to the topic **Prospect Form Definitions** found earlier in this document for additional information.

9000

4.   Once the Prospect form has been saved, the Prospect toolbar on the left will be populated with other function buttons for entering additional information about the Prospect.   Refer to the topic sections on the following pages for data entry instructions for each Prospect toolbar option button.

Entering Prospect Qualifications

Once a new Prospect has been saved, the Qualifications form will be available for data entry.   This form is optional but highly recommended.

1.   Once a Prospect record is open, press the *Qualifications* button from the Prospect toolbar.
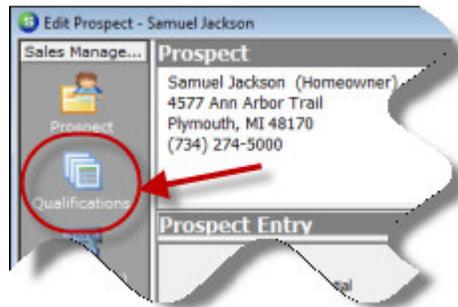
ss9029

2.   The *Qualifications* form will be displayed.   Enter information and/or make selections from drop-down lists according to your company policy and procedures.   When finished, press the *Apply* button located at the lower right of the form to save the information.

9003

Entering Prospect Contacts

Once a new Prospect has been saved, the Contacts form will be available for data entry.

1. Once a Prospect record is open, press the *Contacts* button from the Prospect toolbar.
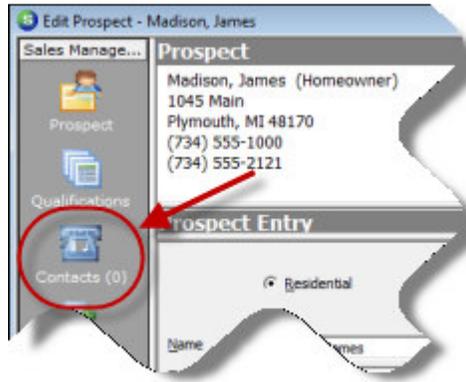
ss9030

2. The *Contacts* form will be displayed.   Press the *New* button located at the bottom of the form to begin entering a new Contact.

3. Enter information and/or make selections from drop-down lists according to your company policy and procedures.   When finished, press the *Save* button located at the bottom of the form. The Contact saved will be added to the Contact List.

To enter additional Contact Names, repeat steps 2 and 3 until all Contacts have been entered.
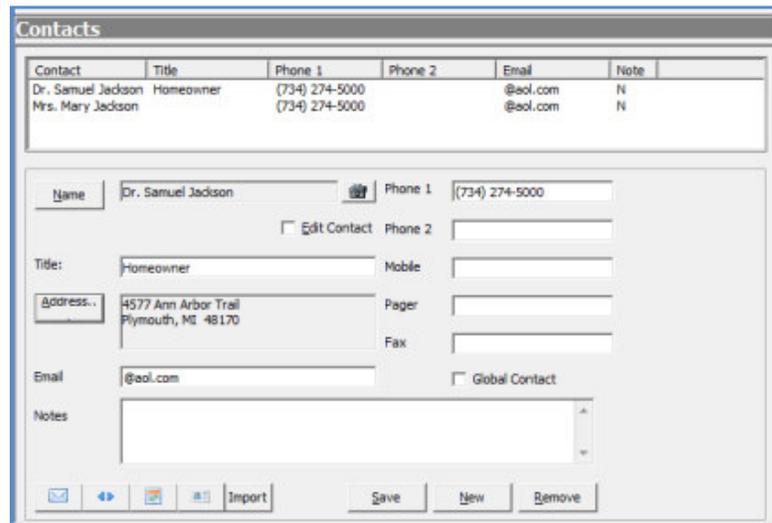
9005

How to Send a Prospect Record to QuoteWerks

Once a new Prospect has been created, the Name, Address and Phone information may be sent to the QuoteWerks application to prepare the quote and proposal for the Prospect.   Follow the instructions listed below to send Prospect information to the QuoteWerks application.

1. Navigate to the Sales Management/Prospect menu option from the Main Application menu.

2. The list of *Prospects* will be displayed.   Double-click on the Prospect record to be sent to QuoteWerks.

3. Once the Prospect record is open, press the QuoteWerks button from the Prospect toolbar on the left.
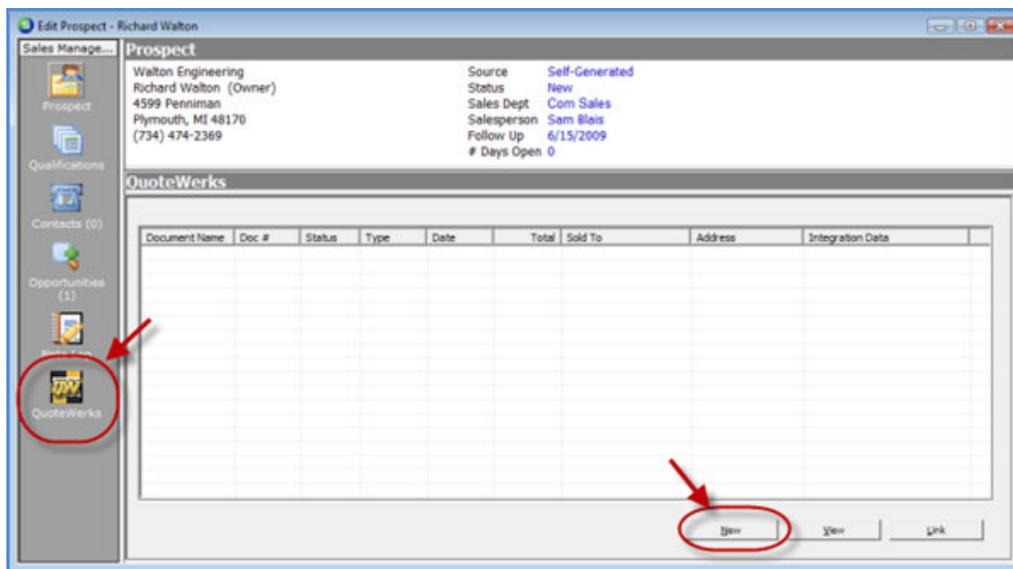
ss9035

4. The QuoteWerks list will be displayed.   Press the *New* button located at the lower right of the QuoteWerks form.

5. The QuoteWerks Login form will be displayed; enter the User Name and Password to login to the QuoteWerks application.

9011

How to send a Prospect record to QuoteWerks (continued)

6.   The QuoteWerks application will open to a new Quote on the Documents Items tab.   Navigate to the *Sold To/Ship To* tab.

7.   The Name, address, telephone numbers, email address will automatically fill into the three Name/Address sections of the *Sold To/Ship To* form.   The three Name/Address sections have a special purpose when importing back into SedonaOffice as a new Customer and Site.   The System and Site sections should contain the Name/Address information of where equipment will be installed.   The Customer section should contain the Bill To information.

8.   The Salesperson will develop the quotation according to company policies and procedures.

9.   Once the sale is closed, the Salesperson will open the Quote and mark it as an Order.   While the Quote is open, from the Main Menu at the top of the QuoteWerks application select File/Convert to Order.

10.   Once the Quote has been converted into an order, it will appear in the SedonaOffice Job/QuoteWerks Orders to Process List.

Opportunities Overview

The Sales Management module provides a tool for tracking sales leads and the dollar values that have been quoted by using *Prospects* and *Opportunities*.

An *Opportunity* is what the Salesperson is trying to sell to a Prospect.   A User may create several Opportunity records for each Prospect record and track each one separately until sold or lost.   If the salesperson is successful in closing the sale with the Prospect, the Opportunity/Prospect record may be turned into a Customer, Site and Job.   The application also tracks lost business through the resolution of each Opportunity; the User may record the reason for losing the business and who the competition was for the opportunity.

Opportunities Form Definitions

Opportunity Queue Definitions

Creating a New Opportunity

Resolving an Opportunity-Sold

Resolving an Opportunity-Lost

Opportunity Definitions

The following pages will describe the layout and the data entry fields contained on the Opportunity form.   For detailed instructions on creating a new Opportunity, refer to the topic ***How to Create a New Opportunities Overview*** found later in this document.

Opportunities are used by SedonaOffice customers that have not purchased QuoteWerks or WeSuites.   An Opportunity is summary information listing what has been quoted to the Prospect.   Detailed quotes and proposals are created outside of the SedonaOffice application.

The Opportunity form is divided into three major sections; the Opportunity List, Opportunity Information and Sales Items.   Each of these sections is described below.   At the bottom of the Opportunity form are several function buttons; these will be described after the Sales Items section.

Opportunity List

An Opportunity is comprised of two of elements; the Opportunity Information and Sales Items. Once an Opportunity is saved, it will appear in the Opportunity List.   The Opportunity List is a listing of all Opportunities currently in progress for a given Prospect.

Opportunity Information

The Opportunity Information section describes the Site of where equipment will be installed along with other system and sales related information.

Sales Items

The Sales Items lists what is being quoted to the Prospect; the type of System to be installed and/or the type of Services to be delivered.   The Sales Items section does not detail the individual parts used in the installation of a System.   Detailed quotes are created outside of the SedonaOffice application.

9006

Opportunity Definitions (continued)

Opportunity Information - Data Entry Fields

Opportunity Title - This will be defaulted by the application; the word Opportunity followed by the number of this opportunity and the Prospect Name.   The User may change this to some other text to identify the Opportunity.   In a commercial environment this may be a project name.

Residential or Commercial - Select the appropriate radio button that applies to the Site for the Opportunity.

Site Name - The application automatically defaults the name of the Prospect; this may be overridden.

Site Address - The application automatically defaults the address entered for the Prospect; this may be overridden if different from the Prospect address.

Total Items & Total Recurring - These two fields will automatically be populated with the totals for Items and Recurring Items entered into the Sales Items section.   These are view only fields.

System Type - Select the type of System being quoted to the Prospect.

Status - This field will default to the Status selected for the Prospect; the User may select a different Status for this Opportunity from the drop-down list.

Source - This field will default to the Source selected for the Prospect; the User may select a different Source for this Opportunity from the drop-down list.

Quote Type - Select the appropriate Quote Type from the drop-down list.

% to Close - The choices in this drop-down list is controlled by SedonaOffice and is a required field. The User must select from one of the four values listed.   This field defines the likelihood of closing the sale.   Choices are 25%, 50%, 75% or 100%.

Est Close - Enter or select a date from the calendar on which the sale is estimated to be closed.

Next Follow Up - The User may enter a follow up date which will appear in the Opportunity Queue.

ss9052

Definitions - Opportunity Form (continued)

Sales Items Data Entry Fields

Sales Item - Select the type of Sales Item being quoted from the drop-down list.   If a default rate was set for the Sales Item, that amount will default into the Rate field.

Description - The Description will automatically fill in when a Sales Item is selected.   This is a display only field and may not be changed.

Cycle - If the Sales Item selected was for a recurring service, the default cycle will default for the Sales Item; this may be overridden by the User.

Qty - The Quantity will default to 1 but may be overridden by the User.

Rate - This is a display only field.   The rate will default from the Sales Item selected.   This is a display only field and may not be changed.   If the default rate is not correct the User will type in the correct amount into the Adj Rate field (next field below).

Adj Rate - If the amount being quoted is different than the amount defaulted into the Rate field, the User may type in the amount in this field or use the Adj Pctg (adjustment percentage) field to increase or discount the rate by a percentage.

Adj Pctg - This field is used to increase or decrease the Rate by a percentage.   If the amount in Adj Rate field was changed, this field will display the percentage of increase or decrease of the default rate for the Sales Item.

Amount - This is a display only field; which is calculating the qty x the rate or adj rate.   This field may not be changed.

Sales Items							
Sales Item	Description	Cycle	Qty	Rate	Adj Rate	Adj Pctg	Amount
INT-Resi-500	INT-Resi-$500		1	500.00	500.00	100.00	500.00
MON	Monitoring	M	1	35.00	35.00	100.00	35.00
SA	Service Agreement		1	8.00	8.00	100.00	8.00

ss9053

Definitions - Opportunity Form (continued)

Opportunity Function Buttons

At the bottom of the Opportunity form are several function buttons; each of these buttons will be described below.

Resolve - Depending on whether the sale was closed or lost, this function button is used to either turn the Prospect/Opportunity into a Customer or to close and inactivate the Opportunity and Prospect.

Save - This button is used to save the information of a new or edited Opportunity.

New - Pressing this button will clear the Opportunity fields to begin entering information for a new Opportunity.

Remove - This button is used to Remove (delete permanently) an Opportunity record.

ss9054

Opportunity List (Opportunity Queue) - Definitions

The *Opportunity List* which is commonly referred to as the *Opportunity Queue*, is a listing of all Opportunities in process.   As Opportunities are sold or lost and inactivated, they drop off the list.   Once a Prospect/Opportunity has been inactivated, it still remains in the database.   Inactive Opportunities may be viewed by selecting the *Show Closed* option on the Opportunity List form.

The Opportunity List contains columns of information in a grid with basic information related to each Opportunity record and has selectable filters located at the top of the form.   The Filters are used to display a list of Opportunities that meet the filter criteria selected.   For example if only the Opportunities created with a particular lead Source are to be viewed, the User will make a selection from the Sources filter.   Only the Opportunity records with the lead Source selected will be displayed in the grid area.

At the lower right of the Opportunity List is a total of Items and RMR; these totals reflect all Items for all Opportunities displayed in the grid.

Each column within the Opportunity List and Filter options will be described in this section.

9010

Definitions - Opportunity List (continued)

Opportunity List Filters

Each filter available is listed and described below.

Sales Department - Each Salesperson is assigned to one or multiple Sales Departments.   When a new Prospect is created this is a required field.   Your company may have one or multiple Sales Departments.   The User may filter the Opportunity list by selecting a single Sales Department from the drop-down list.   The default is All Sales Departments.   Your company creates the list of Sales Departments available for selection.   Sales Department codes are created and maintained in SedonaSetup.

Salesperson - Each Prospect is assigned to a Primary Salesperson and an optional 2nd Salesperson. This filter only works with the Primary Salesperson assigned to the Prospect.   The User may filter the Opportunity list by selecting a single Salesperson from the drop-down list.   The default is All Salespeople.

Status - A Status is a required field on each Opportunity record.   The Status is designed to describe where the Opportunity is in the Sales Cycle.   The User may filter the Opportunity list by selecting a single Status code from the drop-down list.   The default is All Statuses.   Your company creates the list of Statuses available for selection.   Status codes are created and maintained in SedonaSetup.

Source - The Source is a required field on each Opportunity record.   The Source is designed to describe how the Prospect heard about your company.   The User may filter the Opportunity list by selecting a single Source code from the drop-down list.   The default is All Sources.   Your company creates the list of Sources available for selection.   Source codes are created and maintained in SedonaSetup.

Date Range - There are two date field filters provided to search for Opportunity records created within a date range.   The first date field is used as the *from date* and the second date field is used as the *to date*.

ss9071

Definitions - Opportunity List (continued)

Opportunity List Grid

The grid section of the Opportunity List contains several columns of information; each column is described below.

Title - The titled entered for the Opportunity is displayed in this column.

Name - The Name entered on the Opportunity record is displayed in this column.

Entered - This column will display the date on which the Opportunity record was created.

Follow Up - This column displays the current Follow Up date entered on the Opportunity record.   If the Follow Up date is prior to today's date, the Opportunity row will be displayed in a red font.

Status - This column displays the current Status assigned to the Opportunity record.   This field is manually updated on the Opportunity record as the sales cycle progresses.

% to Close - This column displays the current % to Close assigned to the Opportunity.   This field is manually updated by a User on the Opportunity record as circumstances change.

Est Close - The current estimated sale closing date entered on the Opportunity is displayed.

System Type - The type of System assigned to the Opportunity is displayed.

Quote Type - The Quote Type assigned to the Opportunity is displayed.

Item Total - This column displays the total of all non-recurring type Sales Items entered on the Opportunity record.

RMR Total - This column displays the total of all recurring type Sales Items entered on the Opportunity record.   The total amount always displays the monthly amount even if a different billing cycle is selected on the Sales Item line.


9010

How to Create a New Opportunity

Once a new Prospect has been saved, the Opportunity form will be available for data entry.   For detailed information about the Opportunity data entry fields and options, refer to the topic **Opportunities Form Definitions** found earlier in this document.

To create a new Opportunity follow the instructions listed below.

1.   Once a Prospect record is open, press the *Opportunities* button from the Prospect toolbar.
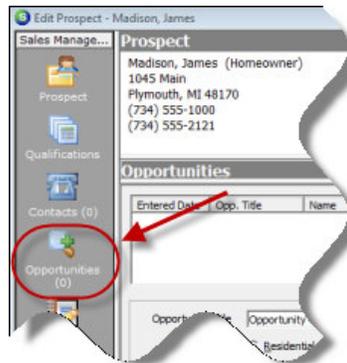
ss9055

2.   The *Opportunities* form will be displayed.   Press the *New* button located at the lower right of the form to begin entering a new Opportunity record.

3.   Enter information and/or make selections from drop-down lists according to your company policy and procedures.   When finished, press the *Save* button located at the bottom of the form. The saved Opportunity will be added to the Opportunity List.

To enter additional Opportunities, repeat steps 2 and 3.

9006

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Resolving a Sold Opportunity

Once the salesperson was successful in closing the sale with the Prospect, the Opportunity/Prospect record will be turned into a Customer, Site and Job by "Resolving" the Opportunity.

Follow the instructions below to Resolve an Opportunity and create the Customer/Site and Job.

1. Navigate to the Sales Management/Prospect menu option from the Main Application menu.

2. Open the Prospect record containing the Opportunity that will be resolved.

3. Once a Prospect record is open, press the *Opportunities* button from the Prospect toolbar.

4. Highlight the Opportunity to be resolved in the upper section of the Opportunity form.

5. Press the *Resolve* button located at the lower left of the Opportunity form.
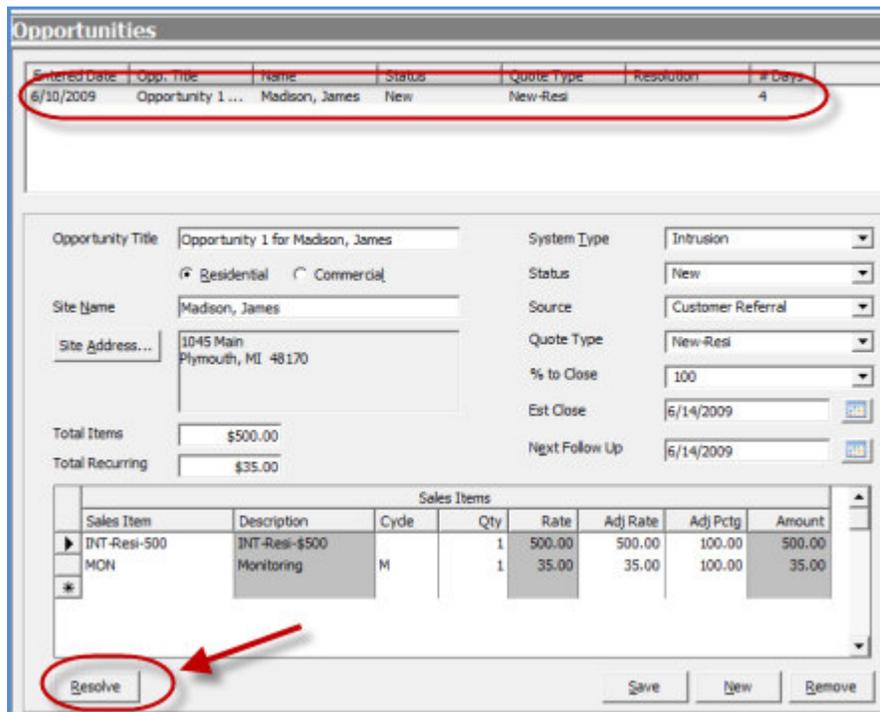
ss9056

Resolving a Sold Opportunity (continued)

6.   The *Opportunity Resolution* form will be displayed. Select the Resolution code from the drop-down list.

7.   The Resolution Date will default to today's date; this field is used to record the date the sale was closed.   The User may override the defaulted date if necessary.

8.   If the salesperson was competing against another company for the business, select the Competition code from the drop-down list.   If there was no competition or the competitor is unknown, your company should setup codes for these purposes to be available for selection.

9.   Close Opportunity - select this option.   This will inactivate the Opportunity so that is will no longer appear in the Opportunity Queue.

10.   Inactivate Prospect - If there are no other Opportunities to be resolved, select this option.

11.   Create Customer - If the Opportunity is for an existing customer, <u>*do not*</u> select this option.   At this point the User will press the *Save* button.   If the Opportunity is for a new Site and or System installation, the User will open the existing Customer record, add a new Site & System then create the Job.

If the Opportunity is not for an existing customer, select this option and continue on to step 12.
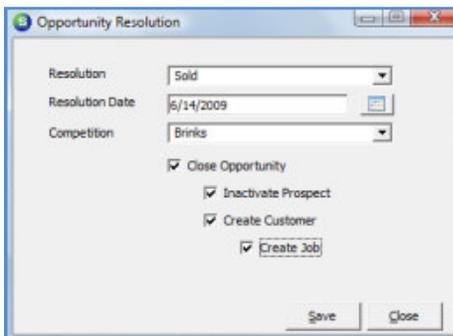
9008

12.   Create Job - select this option if a new Job will be created to install equipment or a Job will be created for activating recurring services.

13.   Once all options have been selected, press the *Save* button.

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Resolving a Sold Opportunity (continued)

14.   The *New Customer Setup* form will be displayed.   Many of the data entry fields will automatically be filled in with information from the Prospect and Opportunity record.   Fill in additional information on the Customer Information form then advance to the Site Information form and fill out the necessary information.   When finished with the Customer and Site setup information, press the *Save* button.   The User will be presented with a confirmation message asking if you are ready to save the new customer; press the *Yes* button to proceed.
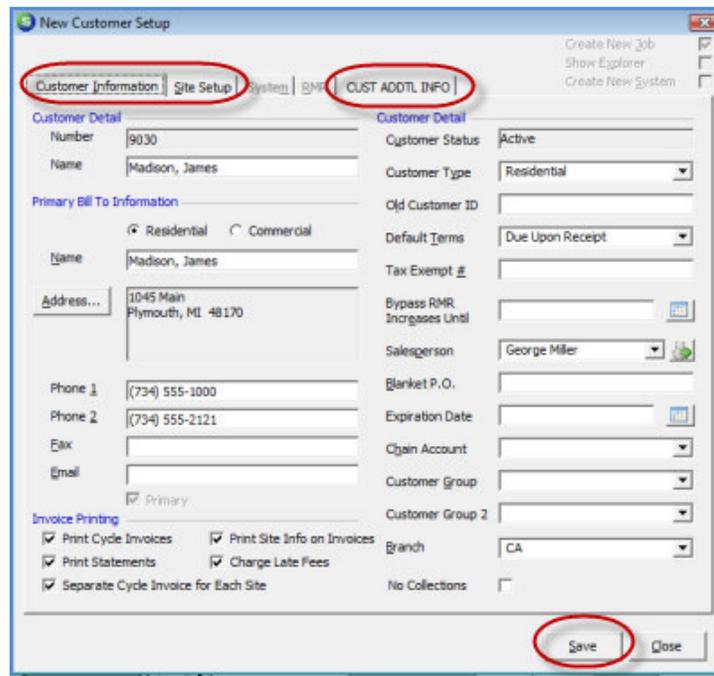
ss9058

15.   Once the Customer & Site information has been saved, the New Job form will be displayed with the *Work Order* data entry form.

16.   The User must make selections for the required fields on the *Work Order* form.   Required fields are: Job Type, Install Company and Sold Date.   When finished entering data, press the *Apply* button to save.

17.   The *Job System* form will be displayed.   The only required field on this form is the System Type, which is defaulted in from the Opportunity record.   When finished entering data, press the *Apply* button to save.

Once the Job System form has been saved, the Job toolbar on the left will fill in with additional Job function buttons.   The Install Charges and Recurring Charges are automatically brought in from the Opportunity record.

The remainder of data entry is typically done by a staff member from accounting and operations.

Resolving a Lost Opportunity

If the salesperson was not successful in closing the sale with the Prospect, the Opportunity/Prospect record should be resolved so that it will be removed from the Prospect Queue and Opportunity Queue.   If the Prospect returns in the future, the Prospect may be retrieved and reactivated.

Follow the instructions below to Resolve and inactivate an Opportunity.

1. Navigate to the Sales Management/Prospect menu option from the Main Application menu.

2. Open the Prospect record containing the Opportunity that will be resolved.

3. Once a Prospect record is open, press the *Opportunities* button from the Prospect toolbar.

4. Highlight the Opportunity to be resolved in the upper section of the Opportunity form.

5. Press the *Resolve* button located at the lower left of the Opportunity form.
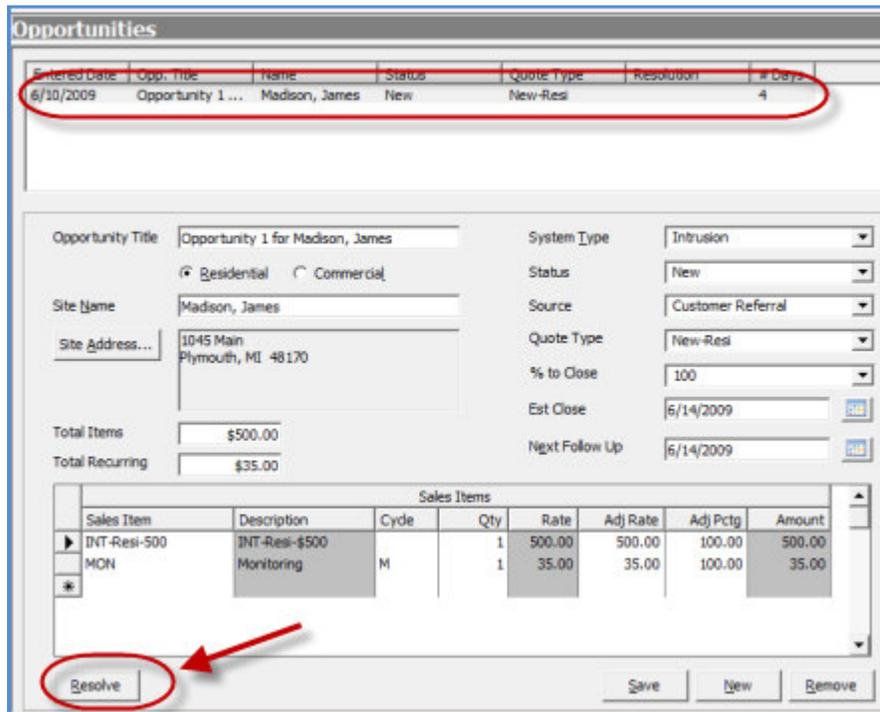
ss9056

Resolving a Lost Opportunity (continued)

6.   The *Opportunity Resolution* form will be displayed. Select the Resolution code from the drop-down list.

7.   The Resolution Date will default to today's date; this field is used to record the date the opportunity was lost.   The User may override the defaulted date if necessary.

8.   If the salesperson was competing against another company for the business, select the Competition code from the drop-down list.   If there was no competition or the competitor is unknown, your company should setup codes for these purposes to be available for selection.

9.   Close Opportunity - select this option.   This will inactivate the Opportunity so that is will no longer appear in the Opportunity Queue.

10.   Inactivate Prospect - If there are no other Opportunities to be resolved, select this option.

11.   Press the *Save* button.

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