

Sales opportunity

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Introduction

Introduction

Sales opportunity is the chance to take advantage of an occurrence in the market to begin a business.

a business idea is a concept that could be used to make money, and an opportunity has proven commercial value.

That's why sales opportunity window is used to enroll new business opportunities.

Business Example

Sales opportunities can be generated from leads. Additionally, users may directly Create sales opportunities.

Tabs

Sales Opportunity Header

The screenshot shows a web application interface for a Sales Opportunity. The browser tab is titled 'Sales Opportunity: 1000000'. The page has a top navigation bar with icons and a 'Home (176)' link. The main content area is titled 'Opportunity' and shows a 'Record saved' message. The form contains the following fields:

- Client:** Sandbox
- Organization:** Automobile Industry
- Document No:** 1000000
- Business Partner:** ARS INDIA PRIVATE LIMITED COIMBATORE
- Campaign:** (Dropdown menu)
- External Agency:** (Dropdown menu)
- Sales Stage:** Quotation
- Opportunity Amount:** 0.00
- Expected Close Date:** 19/11/2020
- User/Contact:** (Dropdown menu)
- Sales Representative:** (Dropdown menu)
- Probability:** 15.00
- Currency:** INR
- Weighted Amount:** 0.00
- Description:** (Text area)
- Comments:** (Text area)

Critical Fields

1.Business partner: We can select existing/new customer here and this field used to maintain the customer

2.Sales stage: The user must select the current stage or status of the sales opportunity based on the conditions provided.

2.1.Active Discussion

2.2.Estimation

2.3.Interest

2.4.Lead

2.5.Order Received

2.6.Preferred

2.7.Proposal

2.8.Quotation

2.9.Rejected

2.10.Selected

3. Probability: Percentage Probability of getting this sales opportunity. It is a Numeric value.

4. Opportunity amount: Amount or estimate after receiving these sales opportunities.

5. Currency: a medium of exchange for goods and services.

6. Expected close date: Date Till Sales opportunity will be in closure stage.

Critical & onetime setup fields

1.Organization: This Field is used to select the organization

Non-Critical Fields

1. User/Contact: This field updates automatically when Business partner selected or you need to create new user in master for particular business partner.

2. Campaign: a plan to do a number of things in order to achieve a special aim for that Sales opportunity. it is a master data

3. Sales Representative: This field is used for sales representative updating purposes, It will display from the employee master when the sales representative field is checked

4. Description: Used to describe specifics about a Sales opportunity document or any other note, information, or data, for example.

5. Comments: Used to describe specifics about a Sales opportunity document or any other note, information, or data, for example.

6.External Agency: It is used to select the existing business partner name.

Zoom condition's

1. Quotation

2. Sales order

Customization

Activity

Opportunity > Activity

Inserted

Client: Konnect Demo Organization: *

Sales Opportunity: 1000024_0.0

Activity Type: [dropdown]

Description: [text area]

User/Contact: zuvansky Sales Representative: [dropdown]

Comments: [text area]

Start Date: 08/06/2020 12:25:06 PM End Date: [calendar icon]

☐ Complete

Critical Fields

1.Sales opportunity : Sales opportunity document number details populate by the system

2.Activity Type

2.1 Email

2.2 Meeting

2.3 Phone call

2.4 Task

3. Description: Used to explain specifics about Activity as well as any other relevant comment, information, or data.

4. Start Date: Lead start date

5. End date: Lead end date

Critical & onetime setup fields

Non-Critical Fields

1. Sub Activity: It is a master data. use to create any activity with in main activity.
 2. User/Contact: This section is used to identify the user or contact who is involved in or accountable for the activity or you need to create new user in master as per business partner.
 3. Sales Representative: This field used for sales representative updating purpose ,the regard will display from employee master when sales representative field is checked
 4. Comments: Used to describe specifics about a Activity document or any other note, information, or data, for example.
 - 5.Complete check box: Check this box to indicate that the activity is finished.
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Zoom condition's

Customization

Tabs

Custom Field

Home (70) Summary Generate Vendor RMA x Sales Rep Dashboard: Mukund... x Mobile Marketing Campaign: ... x Interest Area x *Sales Opportunity: 1000000 x

Opportunity > Custom Field

Inserted

Client Konnect Demo Organization *

Sequence 10 Sales Opportunity 1000000_0

Custom Columns Value Column

Critical Fields

1. Sequence: Method of ordering records (lowest number comes first)
2. Custom columns: Additional field used for reporting purposes.

Critical & one-time setup fields

Non-Critical Fields

1. Value Column: To note Values of column Manually.

Tabs

Quote / order

Opportunity > Quote/Order > Order Line 1/1

<u>Client</u>	Konnect Demo	<u>Organization</u>	Manufacturing Discrete
<u>Order</u>	20000_06/12/2018		
<u>Business Partner</u>	Name 1	<u>Partner Location</u>	Coimbatore
<u>Line No</u>	1		
<u>Warehouse</u>	Manufacturing Discrete Store		
<u>Product</u>	1000014_Bolt 23X25	<u>Charge</u>	
<u>Attribute Set Instance</u>		<u>Resource Assignment</u>	
<u>Description</u>			

▼ Quantities

<u>Quantity</u>	10	<u>UOM</u>	Each
<u>Ordered Quantity</u>	10	<u>Delivered Quantity</u>	0
<u>Reserved Quantity</u>	0	<u>Quantity Invoiced</u>	0

▼ Amounts

<u>Price</u>	50.00	<u>Unit Price</u>	50.00
<u>List Price</u>	50.00		
<u>Tax</u>	No Tax	<u>Discount %</u>	0.0

▼ Reference

<u>Project</u>	
<u>Campaign</u>	

▼ Status

<u>Line Amount</u>	500.00	<u>Lost Sales Qty</u>	0
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Note: This window update automatically when opportunity against Quotation create

Validation

Validation

Save

1. System will check all mandatory fields.
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Delete

1. System will delete the order and its historical details.

Reports

Report

Si no	Report Name	Report Purpose
1	Sales Opportunity	In the manufacturing Industry sales head to review how the company in total and each sales person are doing in terms of volume of opportunities received and how many of these they turn into won deals

Preceding and Succeeding Window

Preceding and Succeeding Window

Sales Opportunity Connected Window

Preceding Window

Lead :- **Lead**

Succeeding Window

Sales opportunity Report

Quotation :- **Quotation**

Customer :- **Customer**