

# 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.

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## 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 Header. The browser tab is titled "Sales Opportunity: 1000000". The form is titled "Opportunity" and has a "Record saved" message. The form fields are as follows:

Field	Value
Client	Sandbox
Organization	Automobile Industry
Document No	1000000
Business Partner	ARS INDIA PRIVATE LIMITED COIMBATORE
Campaign	
External Agency	
Sales Stage	Quotation
Opportunity Amount	0.00
Expected Close Date	19/11/2020
Description	
Comments	
User/Contact	
Sales Representative	
Probability	15.00
Currency	INR
Weighted Amount	0.00

## 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.
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## **Critical & onetime setup fields**

- 1.Organization: This Field is used to select the organization
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## **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.
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## **Zoom condition's**

1. Quotation
2. Sales order

# Customization

Tabs

# 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: [Date Picker]

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

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## Critical & onetime setup fields

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## 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**

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## **Customization**

Tabs

# Custom Field

The screenshot shows a web browser window with several tabs. The active tab is titled '\*Sales Opportunity: 1000000 x'. Below the browser window, there is a navigation bar with 'Opportunity > Custom Field' and a page indicator '+1/1'. The main content area is titled 'Inserted' and contains a form with the following fields:

- Client:** Konnect Demo
- Organization:** \*
- Sequence:** 10
- Sales Opportunity:** 1000000\_0
- Custom Columns:** A dropdown menu with a red border.
- Value Column:** A large text area for manual entry.

## Critical Fields

1. Sequence: Method of ordering records (lowest number comes first)
  2. Custom columns: Additional field used for reporting purposes.
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## Critical & one-time setup fields

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## 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
Line No	1		
<u>Warehouse</u>	Manufacturing Discrete Store		
<u>Product</u>	1000014_Bolt 23X25	<u>Charge</u>	
Attribute Set Instance		<u>Resource Assignment</u>	
<u>Description</u>			

**Quantities**

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

**Amounts**

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

**Reference**

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

**Status**

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

# Validation

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

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](#)

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## Succeeding Window

Sales opportunity Report

Quotation :- [Quotation](#)

Customer :- [Customer](#)