The Right Technology, the Right Results

CRM - Creating Opportunity Types Quick User Guide

Learning Services Promero

A. Creating Libraries in CRM:

NOTE: You should always create your CRM libraries first. Libraries include:

- Sales Stages
- Loss Reasons
- Opportunities

➢ Creating Sales Stages: (Identifies your Company's various sales stages and enables you to track your opportunity through the various\s sales Stages.

NOTE: Do not create Won or Closed Sales Stages. The system automatically creates these for you.

1. Click **Admin**
2. Click **Edit Sales Stages**

Figure 1 – Creating Edit Sales Stages

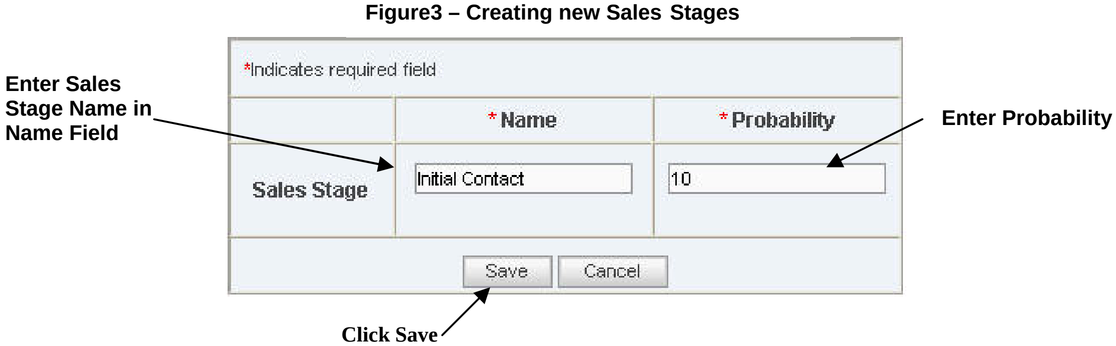
Figure 2 – Create Sales Stage List

3. **Click Create** Sales Stage List.

4. Enter a **Sales Stage Name** in Name Field.
5. **Enter a percentage** rate in Probability Field (this is the probability % of closing the deal for this sales stage).

NOTE: **Do not enter the % sign**. Refer to below Figure 3.

Figure3 – Creating new Sales Stages



6. Click **Save**.
7. **Repeat above steps** until you have entered all of your Sales Stages

➢ **Creating Loss Reasons** (Need to enter why you may lose a deal):

1. Click **Admin**
2. **Scroll** to bottom of Screen
3. **Click Edit Loss Reasons**

Figure 4 – Creating Lost Reasons

Click Edit Loss Reasons

4. Click **Create** Edit Closed **Reason.**

Figure 5 – Select Create Edit Closed Reason

5. **Enter a Closed Reason** (why you may lose a sale)
6. **Optional**: Check box for Comment required (if checked, a comment must be entered when this Closed Reason is selected).
7. Click **Save**
8. **Repeat above steps** until you have entered all of your Closed Reasons.

Figure 6 – Creating New Closed Reason

Check if you want a Comment Entered.

➢ **Creating Opportunities** (Products you are selling)

1. Click **Admin**
2. **Scroll** to bottom of screen
3. **Click Edit Opportunity Types.**

Figure 7 Creating Opportunity Types

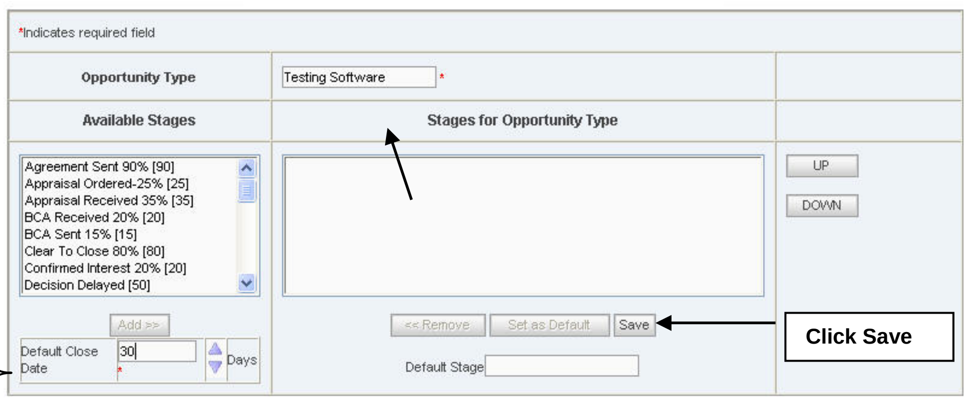
4. **Click Create** Opportunity Type List

Figure 8 – Create Opportunity Type List

5. **Enter New** Opportunity Name in Name field
6. **Enter the Default Close Date.** You can manually enter the number of days you expect to close or click the up and/or down arrows
7. Click **Save**
8. **Repeat above steps** until you have entered all your Opportunity Types.

Figure 9 – Adding Opportunity Types

Enter Default Close Date

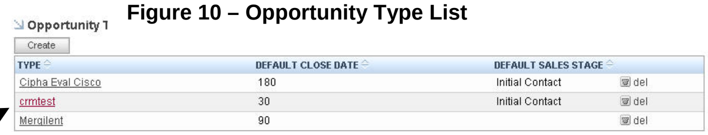


B. Configuring New Libraries:

- **Associating Opportunity Types with Sales Stages** (next you need to associate your sales stages with your opportunity types.)

1. Click **Admin**
2. **Select Edit Opportunity Types** (refer to above Figure 7)
3. **Select Opportunity** in the Opportunity List to associate Sales Stage with.

Figure 10 – Opportunity Type List



As you can see by below Figure, CLOSED WON and **CLOSED LOST** are already assigned to this opportunity.

4. **Select the Sales Stages you want to associate with this Opportunity.**

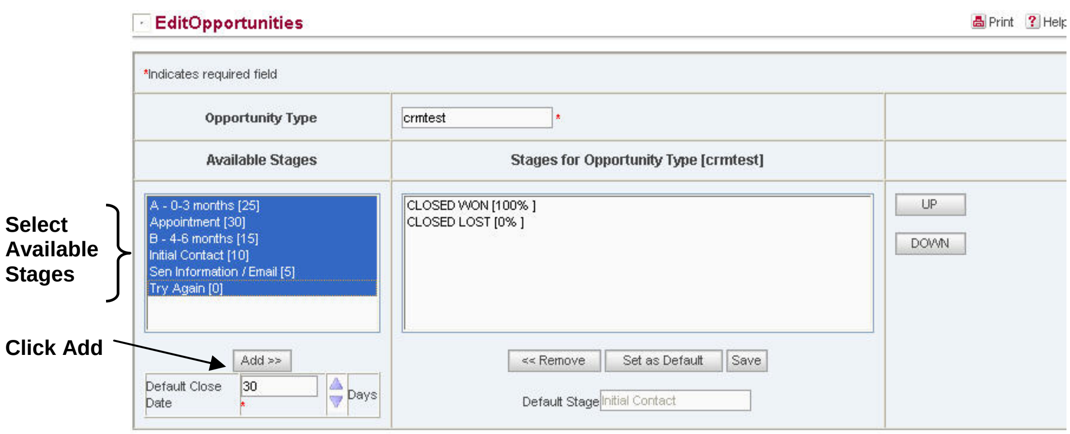
   - You can **select all** by selecting first sales stage, holding down **shift key** and selecting last Sales Stage.

   <u>OR</u>

   - You can **randomly select** by selecting first Sales Stage, holding down **Ctrl key** and selecting other Sales Stages to associate with Opportunity.

5. Click **Add**
6. **Repeat above steps** until all Opportunity Types have been associated with Sales Stages**.**

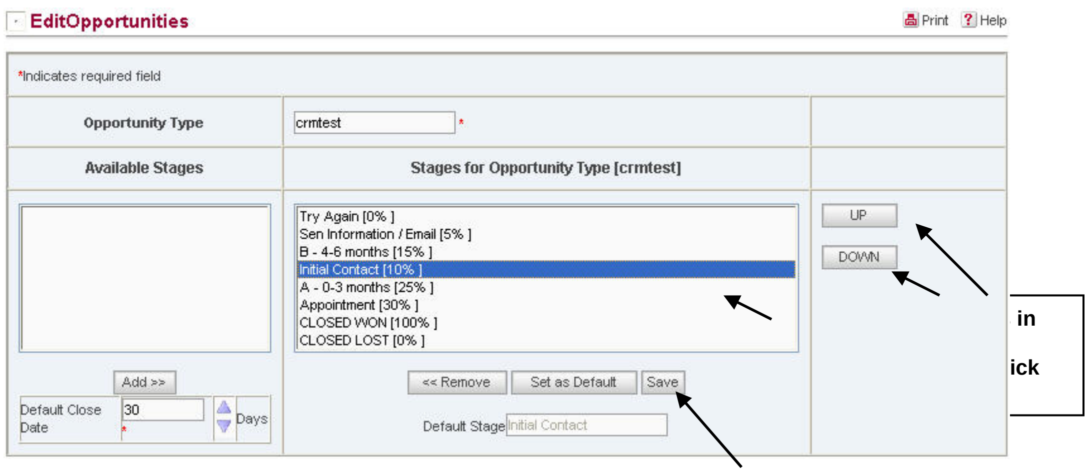
Figure 11 – Adding Sales Stages to Opportunity



➢ Associating Opportunity Types with Sales Stages (Continued):

7. Arrange in order you want to see them by selecting Sales Stage, clicking up and/or down arrow.
8. Click **Save**.

Figure 12 – Arranging Sales Stages



Click Save.

C. Assign Loss Reasons to Opportunities (Next you need to Assign your Loss reasons to your opportunities)

1. Click **Admin**
2. Scroll to Bottom of Screen
3. Click Edit Loss Reasons (Refer to Figure 4)
4. **Click Link Loss Reasons** in Shortcuts

Figure 13 – Selecting Opportunity to Link Loss Reason

5. **Select Opportunity** to Associate (Link) Loss Reason

TYPE	DEFAULT CLOSE DATE	DEFAULT SALES STAGE	
Cipha Eval Cisco	180	Initial Contact	del
crmtest	30	Initial Contact	del
Meralient	90		del

C. Assign Loss Reasons to Opportunities (Continued):

1. **Select Loss Reasons** from Available Reasons Window
2. Click **Add**
3. **Close** the Window
4. **Select another opportunity type** from the Edit Opportunity Types window (refer to Figure 13) and repeat above steps 1 through 3 until all opportunity types have been associated with a Loss Reason.

Figure 14 – Adding Loss Reasons