Opportunity

Module Guide: Opportunity

Module Location

CRM > Opportunity

Module Objective

The **Opportunity** module is the primary tool for the sales team to track all potential sales transactions or deals. Each "Opportunity" entry represents one potential business deal, which is tracked through various **sales stages** until the deal is **won** or **lost**. This module is crucial for managing the **sales pipeline** and creating a **sales forecast**.

1. Main View (Opportunity List)

The main page of this module displays a list of all sales opportunities that exist in the system.



View Explanation

This page provides a general overview of the company's entire sales pipeline.

- **Filters**: You can search for a specific opportunity using filters based on the Opportunity name/code or a **Date From** and **Date To** range.

- **Opportunity List**: The table below displays all opportunities that match the filters. Its columns include **Opportunity**, **Status**, **Customer**, **Sales Stage**, **Probability**, **Price**, and **Account Officer**.

- **New Button**: The primary button to create a new Opportunity entry.

2. Steps to Manage an Opportunity

The following is the complete workflow from creating to updating an Opportunity.

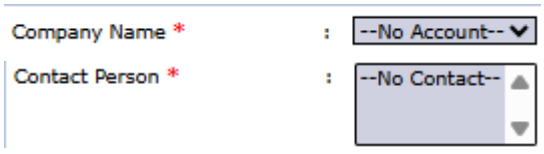
Step 1: Create a New Opportunity

From the Main View, click the **New** button in the bottom-left corner to open the **New Opportunity** form. 

Step 2: Fill in Opportunity Details (New Opportunity Form)

Fill in all the relevant information on the form that appears. Fields marked with `(*)` are mandatory.

- **Company Name & Contact Person**: Select the company name and contact person from the list of registered customers.



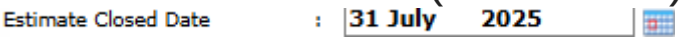
- **Opportunity Name**: Give a specific name for this opportunity, for example: "Production Machine Offer Batch 2".



- **List of Item**: Select the product or service the customer is interested in.



- **Estimate Closed Date**: Enter the estimated date when this deal will be finalized (won or lost).



- **Sales Person**: Assign the salesperson responsible for this opportunity.



- **Description**: Provide additional notes or a description regarding this opportunity.



- **Sales Stage**: Select the initial stage of the sales process (e.g., Prospecting, Qualification).

- **Price**: Enter the estimated total value of this sale.



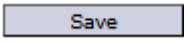
- **Probability**: Enter the percentage chance that this deal will be successful.



- **Status**: Select the initial status of the opportunity (e.g., Open).



Step 3: Save the Opportunity

After all mandatory fields have been completed, click the **Save** button at the bottom to save the new opportunity. The opportunity will now appear in the Main View. 

Step 4: Update the Opportunity

As the sales process progresses (e.g., after a presentation or negotiation), the responsible Sales Person must regularly reopen and update the opportunity data, especially the **Sales Stage** and **Probability** columns, to reflect the latest progress.

Tips & Important Notes

- This module is the main work tool for the **Sales Local** and **International Business** teams to manage their daily sales activities.
- By keeping the data in this module **up-to-date**, management can see an accurate **sales pipeline** and create a more reliable **sales forecast**.
- Each **Sales Stage** typically has a standard **Probability** associated with it, which helps in weighting the sales forecast.

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