

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.

| | | |
|------------------|---|-------------------|
| Company Name * | : | --No Account-- ▼ |
| Contact Person * | : | --No Contact-- ▲▼ |

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

| | | |
|--------------------|---|----------------------|
| Opportunity Name * | : | <input type="text"/> |
|--------------------|---|----------------------|

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

List of Item *
[+] [-]

:

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

Estimate Closed Date : 31 July 2025 

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

Sales Stage : --No Sales Stage-- ▼

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

Description :

Remaining Text: 255

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

Sales Stage : --No Sales Stage-- ▼

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

Price * : 0.00

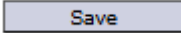
- **Probability:** Enter the percentage chance that this deal will be successful.

Probability : 0 % ▼

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

Status : --No Status-- ▼

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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