



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 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

*Indicates required field

	* Name	* Probability
Sales Stage	Initial Contact	10
<input type="button" value="Save"/> <input type="button" value="Cancel"/>		

Enter Sales Stage Name in Name Field

Enter Probability

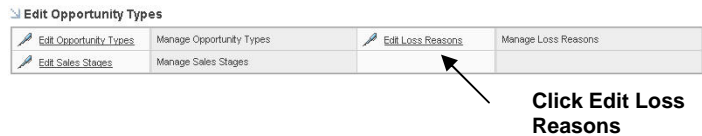
Click Save

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



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

The screenshot shows a form titled 'Enter New Closed Reason'. It has a header with '*Indicates required field'. Below the header are two columns: '* Name' and 'Comment Required'. The 'Name' column has a text input field containing 'Price too High'. The 'Comment Required' column has a checked checkbox. At the bottom are 'Save' and 'Cancel' buttons. Arrows point from the text 'Enter a Closed Reason' to the input field, and from 'Check if you want a Comment Entered.' to the checkbox.

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

*Indicates required field

Opportunity Type: Testing Software *

Available Stages:

- Agreement Sent 90% [90]
- Appraisal Ordered-25% [25]
- Appraisal Received 35% [35]
- BCA Received 20% [20]
- BCA Sent 15% [15]
- Clear To Close 80% [80]
- Confirmed Interest 20% [20]
- Decision Delayed [50]

Stages for Opportunity Type

Default Close Date: 30 Days

Buttons: UP, DOWN, << Remove, Set as Default, Save

Click Save


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



Opportunity Type	DEFAULT CLOSE DATE	DEFAULT SALES STAGE	
Alpha Eval Cisco	180	Initial Contact	del
crrmtest	30	Initial Contact	del
Merillent	90		del

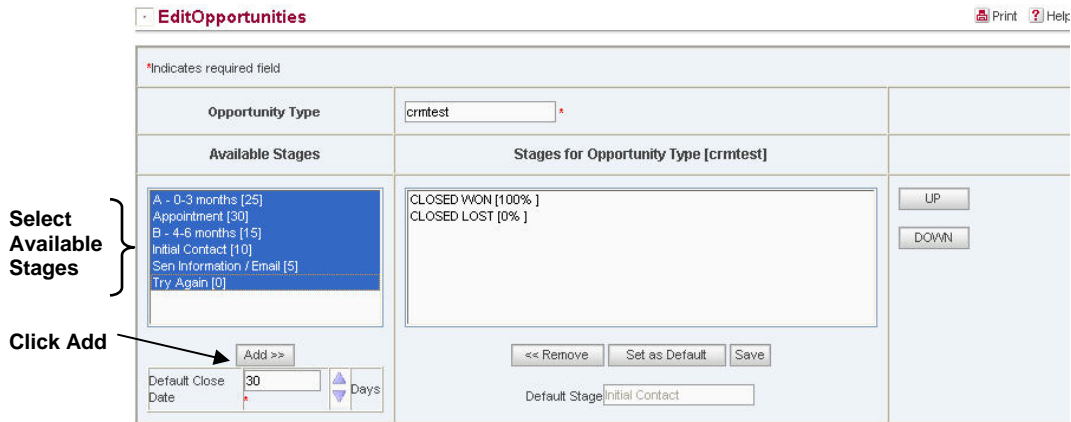
As you can see by below Figure, **CLOSED WON** and **CLOSED LOST** are already assigned to this opportunity.

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.

OR

 - 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



Edit Opportunities Print Help

*Indicates required field

Opportunity Type	crrmtest *	
Available Stages	Stages for Opportunity Type [crrmtest]	
<ul style="list-style-type: none"> A - 0-3 months [25] Appointment [30] B - 4-6 months [15] Initial Contact [10] Sen. Information / Email [5] Try Again [0] 	CLOSED WON [100%] CLOSED LOST [0%]	UP DOWN
Default Close Date: 30 Days	<< Remove Set as Default Save	Default Stage: Initial Contact

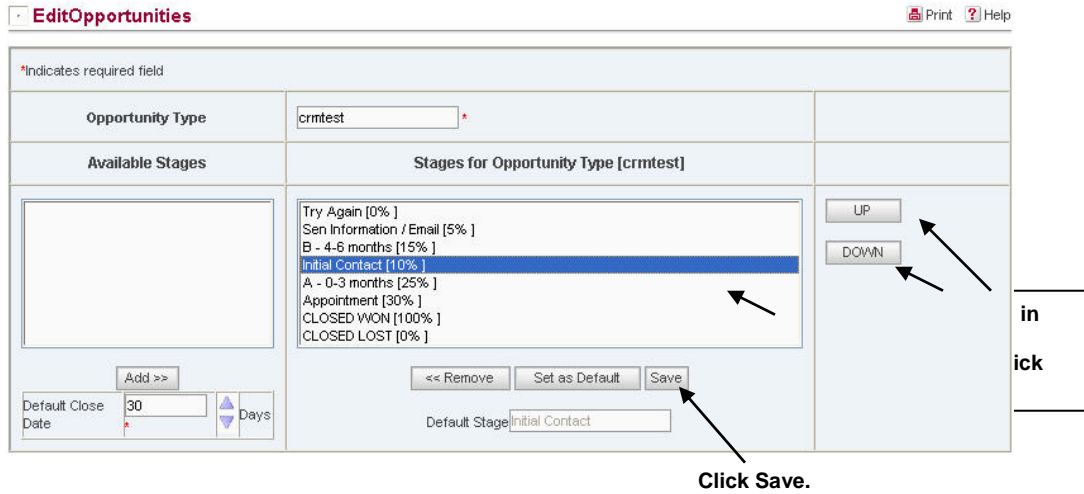
Select Available Stages (bracketed next to Available Stages list)

Click Add (arrow pointing to 'Add >>' button)

➤ **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



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



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

Figure 13 – Selecting Opportunity to Link Loss Reason

TYPE	DEFAULT CLOSE DATE	DEFAULT SALES STAGE
Cinpha Eval Cisco	180	Initial Contact
crmtest	30	Initial Contact
Merrollent	90	Initial Contact

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

