

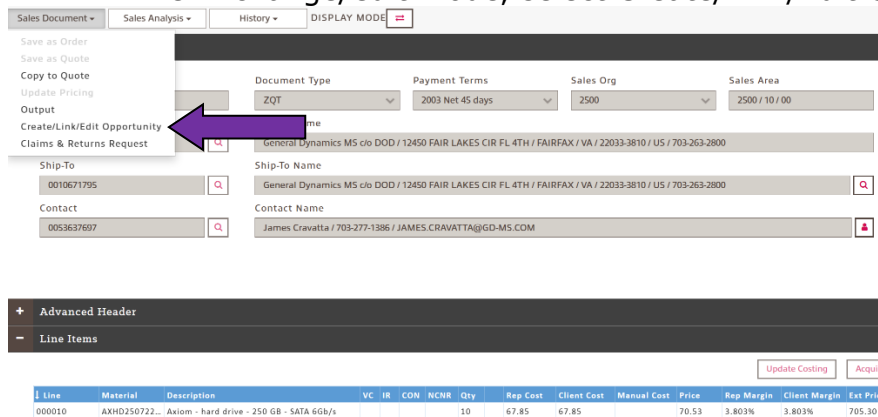
Creating ClientLink Opp from SMART

This brief is intended to provide instructions on how to create an auto populated ClientLink opportunity from your SMART quote.

***Name the opportunity "NAT-QBR"**

Steps to create a ClientLink Opp/ID from SMART:

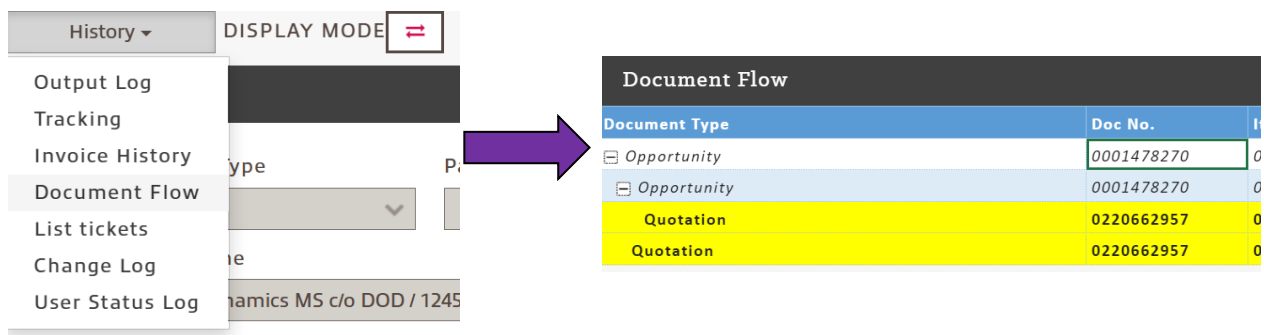
1. While in change/edit mode, select Create/Link/Edit Opportunity:



The screenshot shows the SMART system interface. On the left, a menu is open with the option 'Create/Link/Edit Opportunity' highlighted. A purple arrow points to this option. The main area displays document details for a quote, including Document Type (ZQT), Payment Terms (2003 Net 45 days), Sales Org (2500), and Sales Area (2500 / 10 / 00). Below this, there are fields for Ship-To (0010671795), Ship-To Name (General Dynamics MS c/o DOD / 12450 FAIR LAKES CIR FL 4TH / FAIRFAX / VA / 22033-3810 / US / 703-263-2800), Contact (0053637697), and Contact Name (James Cravatta / 703-277-1386 / JAMES.CRAVATTA@GO-MS.COM). At the bottom, there is a table with columns: Line, Material, Description, VC, IR, CON, NCNR, Qty, Rep Cost, Client Cost, Manual Cost, Price, Rep Margin, Client Margin, and Ext Price. The table contains one row with data for line 000010.

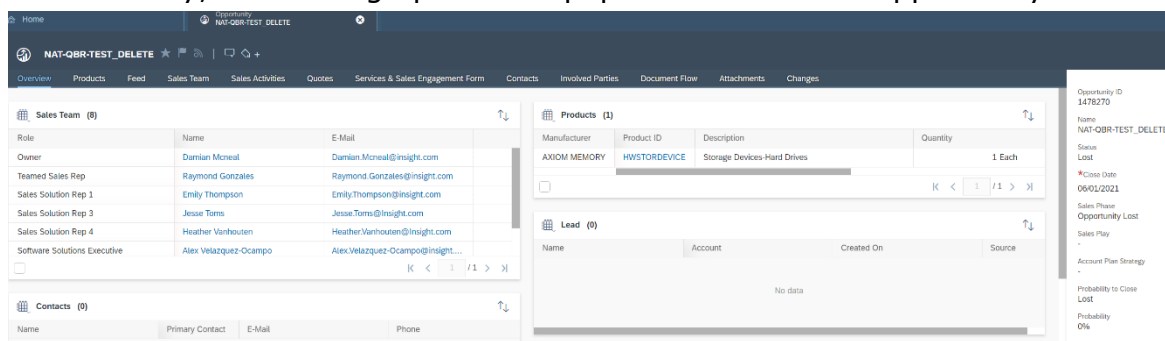
*Note might take a minute to create the ClientLink opp.

2. Next, select Document Flow under History and double click your ClientLink ID:



The screenshot shows the SMART system interface. On the left, a menu is open with the option 'Document Flow' highlighted. A purple arrow points to this option. The main area displays a table titled 'Document Flow' with columns: Document Type, Doc No., and a third column. The table contains four rows of data. The first two rows are 'Opportunity' with Doc No. 0001478270. The next two rows are 'Quotation' with Doc No. 0220662957. A purple arrow points to the 'Opportunity' row with Doc No. 0001478270.

3. Finally, it will bring up an auto populated ClientLink opportunity:



The screenshot shows the SMART system interface. The top bar displays the opportunity name 'NAT-QBR-TEST_DELETE'. Below this, there is a table with columns: Role, Name, and E-Mail. The table contains five rows of data for sales team members. To the right of this table, there is a table with columns: Manufacturer, Product ID, Description, and Quantity. The table contains one row of data for 'AXIOM MEMORY' with Product ID 'HWSTORDEVICE' and Description 'Storage Devices Hard Drives'. At the bottom, there is a table with columns: Name, Account, Created On, and Source. The table is empty. On the right side, there is a sidebar with information about the opportunity, including the Opportunity ID (1478270), Name (NAT-QBR-TEST_DELETE), Status (Lost), Close Date (06/01/2021), Sales Phase (Opportunity Lost), Sales Play, Account Plan Strategy, Probability to Close (Lost), Probability (0%), and Total Reproduced Volume.

*Note contacts, products, and other information are already populated.