Quick Reference Guide

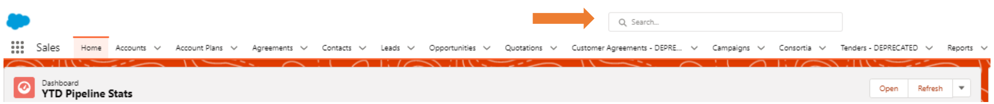
QRG, Opportunity Creation

Last Modified: December, 2021

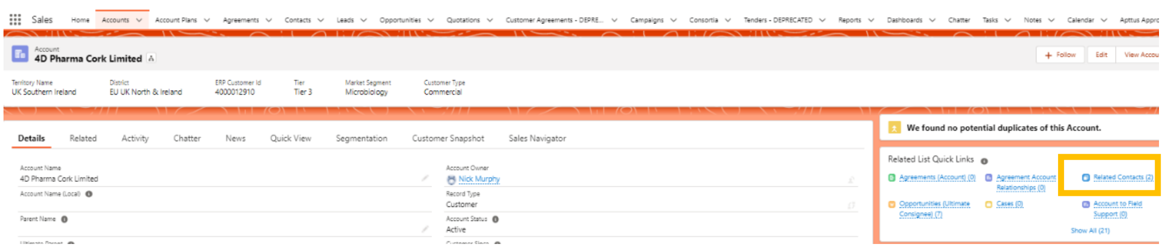
Updated by: Stella Efthymiadi (EMEA version)

Creating a Direct Standard Opportunity

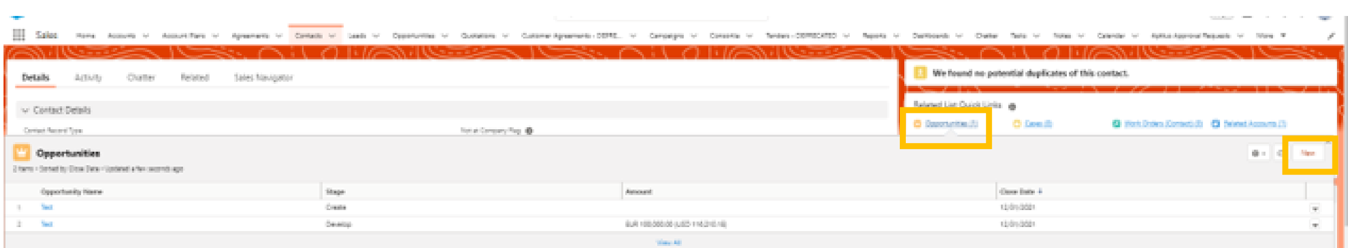
1. **Navigate** to the Contact for whom you will be creating the opportunity
    - **Search** in the main search bar at the top of the screen, or



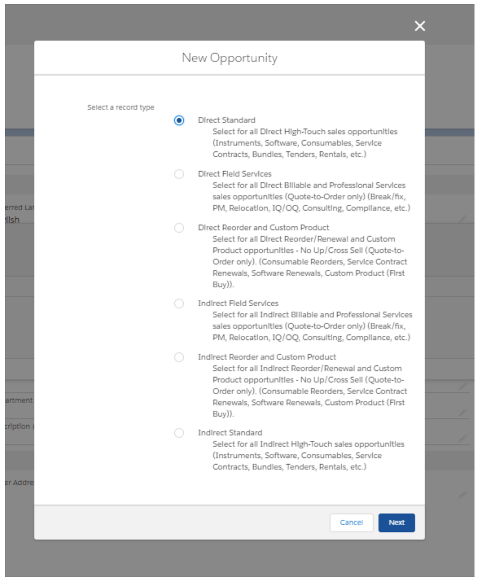
    - Navigate to the **Account** then click into **Related Contacts** in the **Related List Quick Links** to find the appropriate contact for your opportunity



2. Within the **Contact** record, hover the mouse over **Opportunities** in the **Related Quick Links** or scroll to the **Opportunity** section in the Related tab



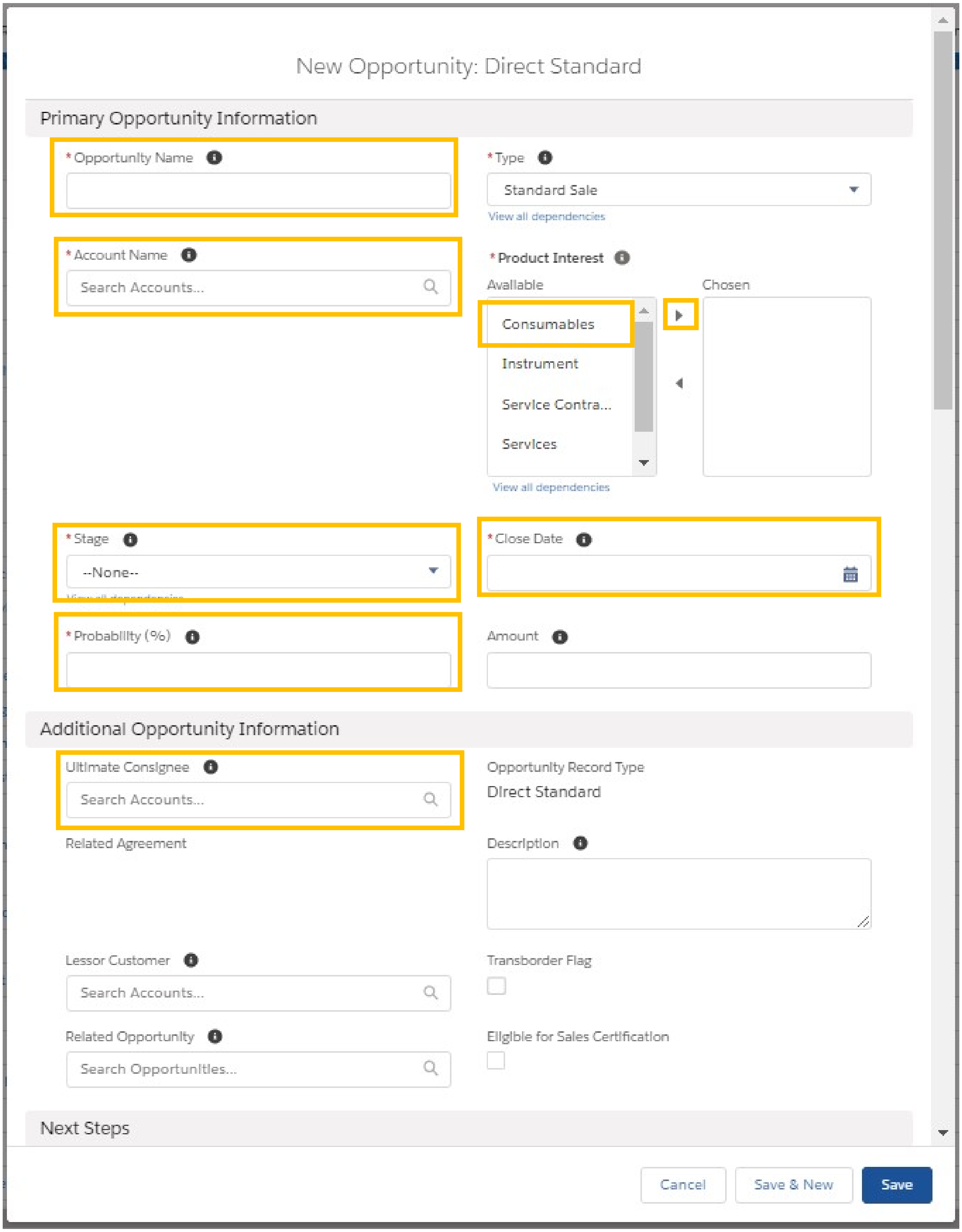
3. Click **New** to create a new opportunity
4. Choose your **Record type**:
    - Direct/Indirect Standard
    - Direct/Indirect Reorder and Customer Product



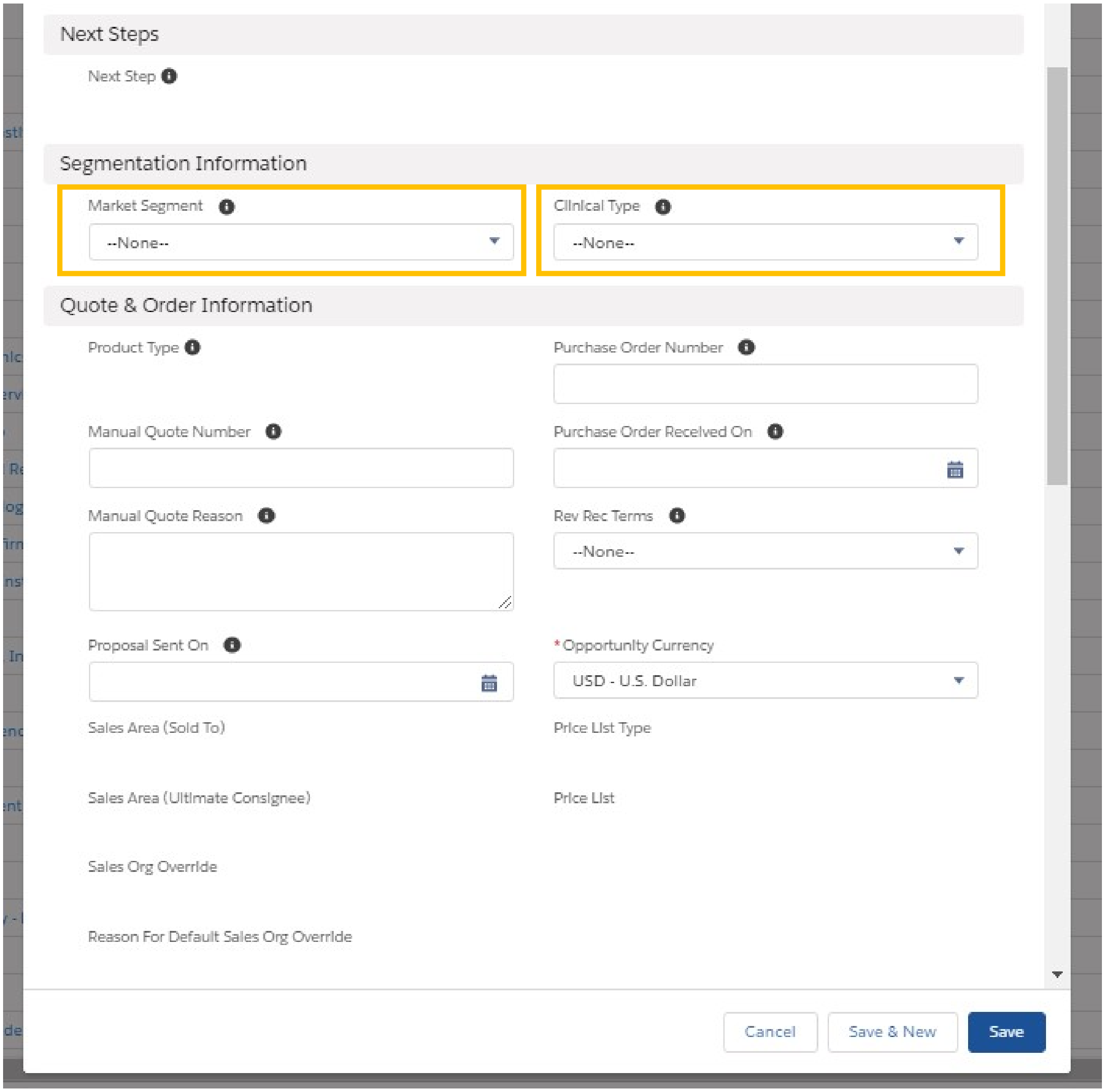
5. Enter the **following criteria** on the New Opportunity screen:
    - **Opportunity Name**
        - Recommended Naming Convention: ProductDesc_Qty_AccountName_AcctContact
    - **Account name** will auto populate; verify Account Name and the Ultimate Consignee, *if different,* are correct. For indirect opportunities, verify the Distributor account as well.
    - **Type**: choose from the dropdown; Standard, Concierge, Consortium etc.
    - **Product Interest:** Select the applicable products move them to the “chosen” side
    - **Stage**: must choose Create
    - **Probability** field will auto populate to 10%
    - **Close Date:** Choose an estimated Closed Date
    - Verify **Market Segmentation** and **Clinical Type**

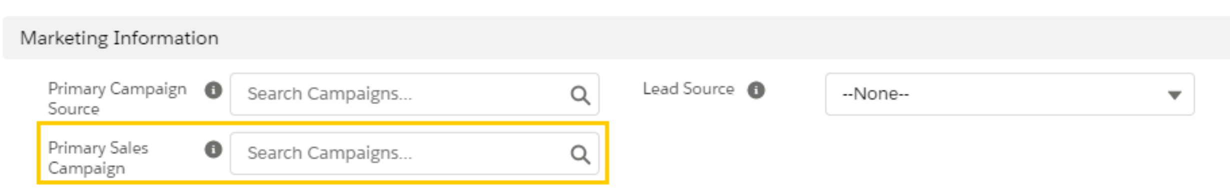
Note: Check the “Eligible for Sales Certification” flag if you need to identify the opportunity as eligible for the quarterly Sales Certification Survey.

- Link your campaign to the **Primary Sales Campaign**
- Click **Save**



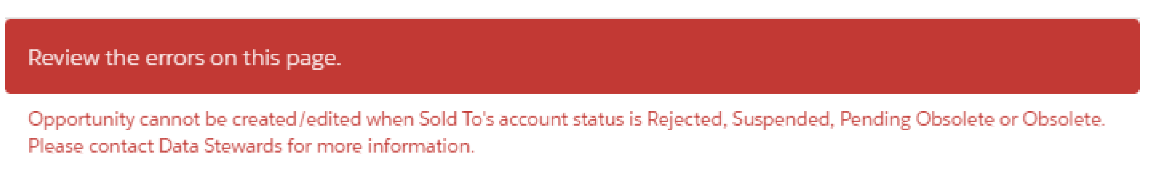
New Opportunity: Direct Standard
Primary Opportunity Information
* Opportunity Name
* Type
Standard Sale
View all dependencies
* Account Name
Search Accounts...
* Product Interest
Available
Chosen
Consumables
Instrument
Service Contra...
Services
View all dependencies
* Stage
--None--
* Close Date
* Probability (%)
Amount
Additional Opportunity Information
Ultimate Consignee
Search Accounts...
Opportunity Record Type
Direct Standard
Related Agreement
Description
Lessor Customer
Search Accounts...
Transborder Flag
Related Opportunity
Search Opportunities...
Eligible for Sales Certification
Next Steps
Cancel
Save & New
Save


Next Steps
Next Step
Segmentation Information
Market Segment
--None--
Clinical Type
--None--
Quote & Order Information
Product Type
Purchase Order Number
Manual Quote Number
Purchase Order Received On
Manual Quote Reason
Rev Rec Terms
--None--
Proposal Sent On
* Opportunity Currency
USD - U.S. Dollar
Sales Area (Sold To)
Price List Type
Sales Area (Ultimate Consignee)
Price List
Sales Org Override
Reason For Default Sales Org Override
Cancel
Save & New
Save


Marketing Information
Primary Campaign Source
Search Campaigns...
Lead Source
--None--
Primary Sales Campaign
Search Campaigns...

Notes

- If a user attempts to create an opportunity where either the Ultimate Consignee or Sold To has a status of Rejected, Suspended, Obsolete or Pending Obsolete, the system will not allow the user to proceed, and user will be presented with the below error:

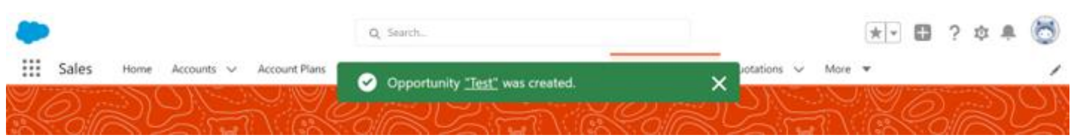


- If an Ultimate Consignee or Sold To's status is updated to Rejected, or Suspended and the account has associated open opportunities, then user will still be able to edit the opportunity
- Existing validation rule preventing opportunity edits when the Ultimate Consignee or Sold To's status is Obsolete or Pending Obsolete remain in place

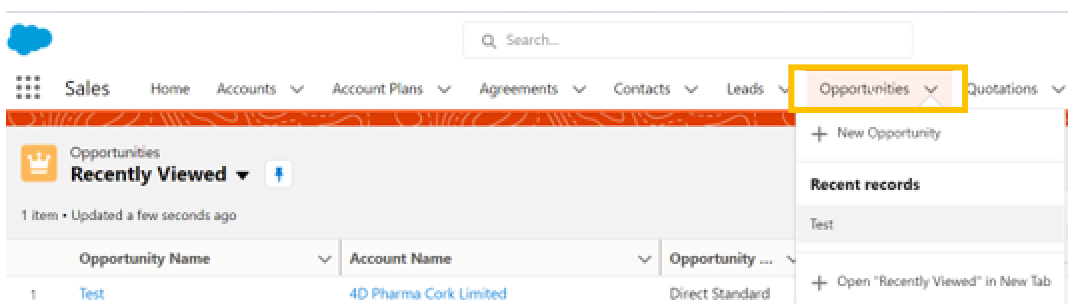
Accessing Your Opportunity

To access the opportunity you just created:

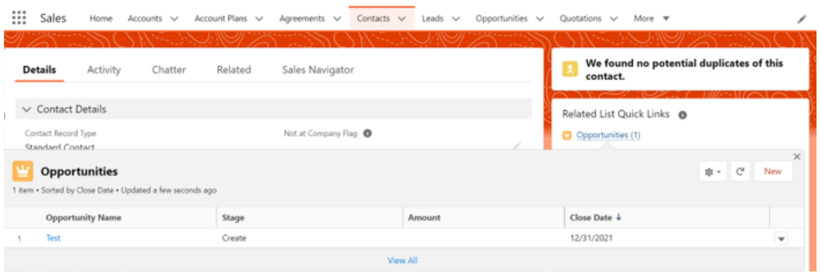
- Click on the **opportunity link** within the green message that appears at the top of the screen (this will go away after a minute or so of inactivity)



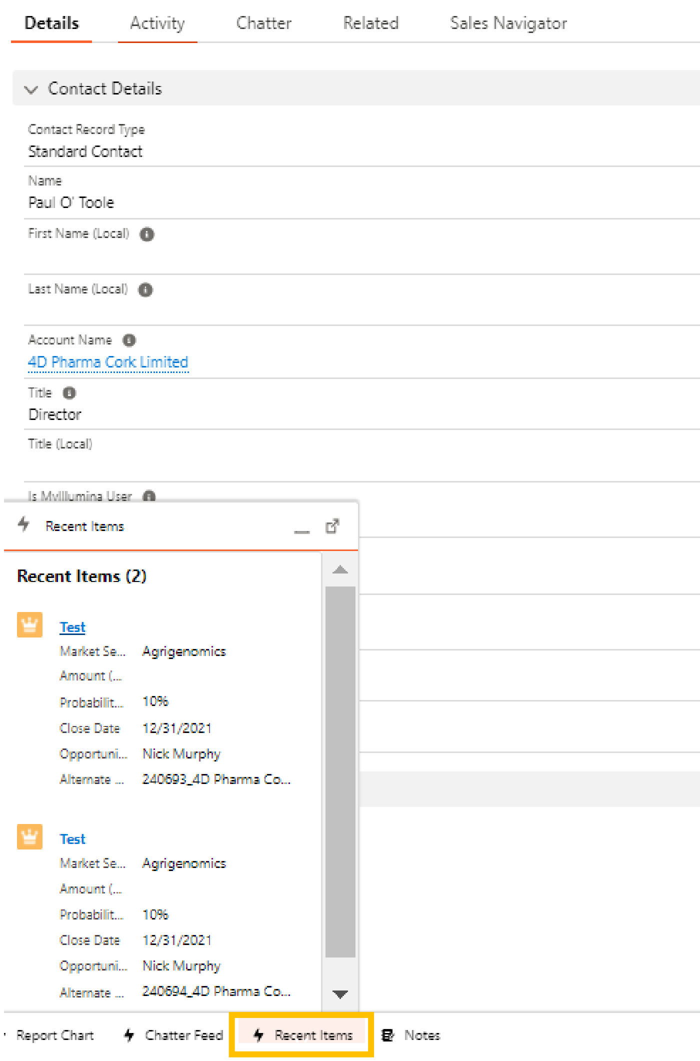
- Navigate to the **Opportunities tab** at the top of the screen and select your newly created opportunity from the list. NOTE: the Opportunity list defaults to **Recently Viewed**



- Hover over the **Opportunities** in the Related List Quick Links on the Contact Page then select your opportunity



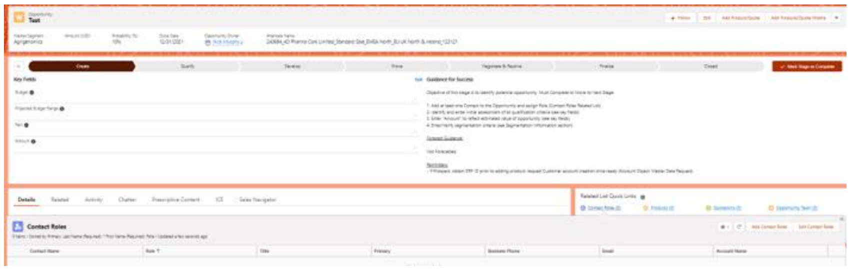
- Select **Recent Items** at the bottom of your screen to view the three most recent opportunities you have been working on



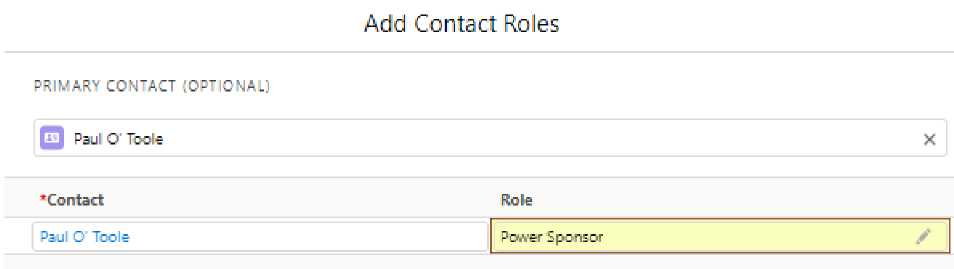
Progressing Your Opportunity (Create to Finalize)

Your Opportunity will currently be in the **Create** Stage. Fill in all the criteria listed in Guidance for Success:

- If you did not create your Opportunity from the contact record you will need to navigate to **Related List Quick Links**, hover over Contact Roles and select **Add Contact Roles**.



- Search for your contact or create a new contact. Select a **Contact Role** from the dropdown menu and select a **Primary Contact** (the person who will receive the quotation)



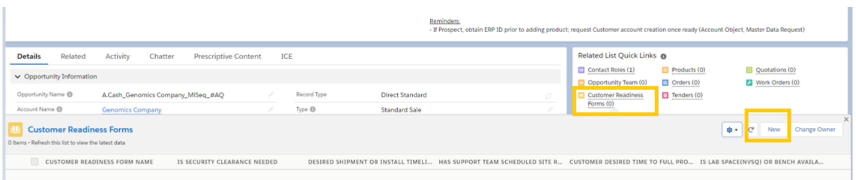
- Add any additional Contacts, if needed, within the Add Contact Roles screen. If you can, identify the **Power Sponsor** now, otherwise you will need to do this prior to progressing from Qualify to Develop.
- Complete the **Key Fields** in the Create Stage:
  - Budget: choose from dropdown
  - Projected Budget Range: choose from dropdown
  - Pain: choose from dropdown
  - Amount (Sold To): enter the approximate dollar amount of the quotation
  - Click **SAVE**
- Verify Segmentation criteria
- Select **Mark Stage as Complete**

Your Opportunity will currently be in the **Qualify** Stage. Fill in all the criteria listed in Guidance for Success:

- In **Key Fields,** go to **Summarize Buying Vision** and enter your summary in free form text
- Click **SAVE**
- If you have not already assigned a **Power Sponsor** within your **Contact Roles**, do so now. Go to **Related Quick Links**, hover over **Contact Roles**, choose **Add Contact Roles** and select the **Contact** with a **Role** of **Power Sponsor.** Click **SAVE**
- Select **Mark Stage as Complete**

Your Opportunity will currently be in the **Develop** Stage. Fill in all the criteria listed in Guidance for Success:

- In **Key Fields** complete the following:
  - Customer's Next Steps; summarize the next steps in free form text
  - Click **SAVE**
- Validate the **Ultimate Consignee**
  - In the **Details** Tab, scroll down to **Additional Opportunity Information** and ensure you have the correct **Ultimate Consignee** selected. If it is incorrect, then change it now, prior to adding products.
- Add products. *(For this section, please refer to the* ***How to Create a Quotation Document*****).** Must **Finalize and Sync** the quote so that the products sync back to the opportunity and the **Are Products Added** box will be checked.
- *(Optional)* Complete **CRF Section 1,** if an instrument is added to the opportunity
  - Go to **Related List Quick Links**, hover over **Customer Readiness Forms,** choose **NEW**



  - Complete all fields for Section 1 of the CRF:
    1. Current Illumina Instrument Customer: choose from dropdown
    2. Is BSL Level >=3: choose from dropdown
    3. Is Security Clearance Needed: choose from dropdown
    4. Choose Application: check the appropriate box
    5. Data Storage: check the appropriate box
    6. Click **SAVE**
- Select **Mark Stage as Complete**

Your Opportunity will currently be in the **Prove** Stage. Fill in all the criteria listed in Guidance for Success:

- In **Key Fields** complete the following:
  - Proposal Sent On: this will auto populate after you send the quotation either to the customer or yourself during the Generate Quote step.
  - Customer Confirmed Solution Fit On: choose a date from the calendar dropdown
  - Rev Rec Terms: select the anticipated terms from the dropdown
  - Click **SAVE**
  - *(Optional)* Complete **CRF Section** 2, if an instrument is associated with the opportunity.
    1. Go to **Related Quick Links**, hover over **Customer Readiness Forms,** choose the CRF you previously created
    2. Scroll down to Section 2 and complete the following fields:
       a. Desired Shipment or Install Timelines: enter a timeframe
       b. Has Support Team Scheduled Site Review: check box if yes
    3. Click **SAVE**
    4. Navigate back to your Opportunity from the hyperlink at the top of your CRF.

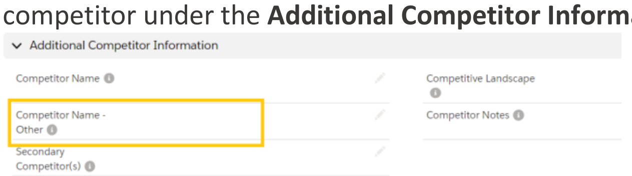
- Must identify a **Primary Contact** if you have not already done so, in order to generate a Quote output document
    1. Go to **Related List Quick Links**, hover over Contact Roles and select **Add Contact Roles**
    2. Go to **Primary Contact** search and choose a contact
    3. Click **SAVE**

Note: The primary contact can also be changed directly on the Opp record and Quotation header.

- Select **Mark Stage as Complete**

Your Opportunity will currently be in the **Negotiate and Resolve** Stage. Fill in all the criteria listed in Guidance for Success:

- In **Key Fields** complete the following:
  - Win Strategy: Select from Dropdown
  - Competitor Name: Select from dropdown. If **Other** is selected, must fill in the competitor under the **Additional Competitor Information** section



  - Customer Account Creation On: If this is a Sold-To Account, then leave blank. If this is a Prospect Account, enter the date that the upgrade to a Sold To was requested through the Master Data Request.
  - *(Optional)* Complete **CRF Section 3**
    1. Go to **Related Quick Links**, hover over **Customer Readiness Forms,** choose the CRF you were working on before
    2. Scroll down to Section 3
    3. Customer Desired Time to Full Production: select from dropdown
    4. Is Lab Space or Bench Available: choose yes or no
    5. Click **SAVE**
    6. Navigate back to your Opportunity from the hyperlink at the top of your CRF.
- Select **Mark Stage as Complete**

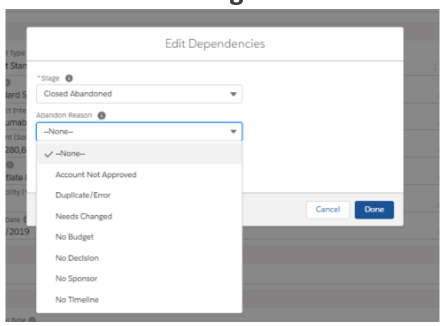
Your Opportunity will currently be in the **Finalize** Stage.

- Once your Purchase Order has been received, Customer Care will process the order and your opportunity will be automatically set to **Closed Won.** If this is not done automatically, you can contact salesops_EMEA@illumina.com for support

Closed Abandoned or Closed Lost

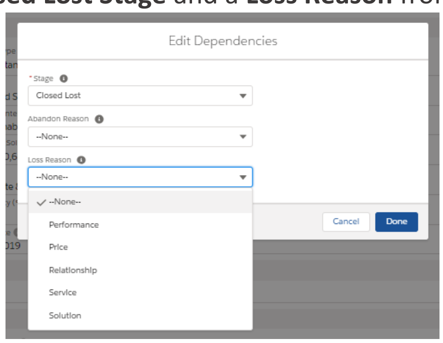
If at any point during the Opportunity, you need to Close the Opportunity select the **Closed** chevron and then the **Select Closed Stage** button

- If the customer has decided to not do anything, and thus the opportunity cannot be progressed
  - Select the **Closed Abandoned Stage** and an **Abandon Reason** from the drop down.



  - Click **Done**

- If the Opportunity has been lost and somebody else has won the opportunity
  - Select the **Closed Lost Stage** and a **Loss Reason** from the drop down.



  - Click **Done**

Release History

Version	Date	Originator	Description of Change
1	March 2019	Y. Merlin	Initial Release
2	05/07/2020	A. Sturgis	Addition of guidance on Opp Creation for Ineligible Accounts per DCP May Enhancement Release
3	05/26/2020	A. Sturgis	Addition of opportunity naming convention
4	11/12/2020	A. Sturgis	Additions per DCP Nov 2020 Release
5	3/12/2021	T. Nguyen	Additions per DCP Feb 2021 Release
6	December 2021	S. Efthymiadi	Adjusted the document to EMEA