

## OPPORTUNITIES - Part 2

1. Click on "New Opportunity" under same Account page.

The screenshot shows the Salesforce interface for an account named 'TEST PAYING ACCT'. The page is viewed in a Windows Internet Explorer browser. The account details are displayed in a table format, including fields like Account Owner, Account Name, Parent Account, Territory, Sub-territory, Facility Size, System Brands, Type of AES Antenna, Signal Strength -Forward (W), and Signal Strength -Reflected (W). Below the account details, there are sections for Contact Information, Additional Information, and Financial Standing. A red arrow points to the 'New Opportunity' button in the Opportunities section. The Opportunities table lists three entries: 'CCTV system for Building 1 Levels 10-20', 'Test -Peso', and 'A/Dex/00058', each with a Stage, Grand Total (one-time), and Close Date.

Account: TEST PAYING ACCT ~ salesforce.com - Enterprise Edition - Windows Internet Explorer

https://emea.salesforce.com/00120000001iw05?srPos=1&srKp=001

File Edit View Favorites Tools Help

Opportunity/Pipeline Report ... Account: TEST PAYING A...

Account  
TEST PAYING ACCT

Printable View | Customize Page | Edit Layout | Help for this Page

< Back to List: Accounts

Opportunities [5] | Account Team [0] | Contracts [0] | Contract Sites [0] | Cases [1] | Open Activities [1] | Activity History [1] | Contacts [2] | Contact Roles [0] | Partners [1] | Notes & Attachments [1] | Cases [0] | Account History [7]

Account Detail

Edit Delete Sharing Include Offline

Account Owner: [Dexine Hu](#) [Change]

Account Name: TEST PAYING ACCT [View Hierarchy]

Parent Account

Territory: MNC

Sub-territory: Technology

Facility Size: More than 10,000 sq ft

System Brands: AMAG

Type of AES Antenna

Signal Strength -Forward (W)

Signal Strength -Reflected (W)

Type: Customer

Type - Other

Account Number

CSID

Customer Type

Zone: None

Contact Information

Additional Information

Financial Standing

Edit Delete Sharing Include Offline

Opportunities

New Opportunity

Opportunities Help

Action	Opportunity Name	Stage	Grand Total (one-time)	Close Date
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">CCTV system for Building 1 Levels 10-20</a>	Prepare/Submit Quotation	SGD 1,000,000.00	31/05/2010
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Test -Peso</a>	Prepare/Submit Quotation		15/03/2010
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">A/Dex/00058</a>	Price Quote	SGD 3,900.00	31/08/2009

Done

Start | Inbox - Microsoft Outlook | Account: TEST PAYIN... | Microsoft Excel - SFDC N... | Windows Media Player

Internet | 100% | 2:57 PM

## 2. Select Opportunity Type

New Opportunity: Select Opportunity Record Type ~ salesforce.com - Enterprise Edition - Windows Internet Explorer

https://emea.salesforce.com/setup/ui/recordtypeselect.jsp?ent=Opportunity&retURL=%2F0012000000Iiw05%3FsrPos%3D0%26srkp%3D001&save\_new\_url=%2F006%26srPos%3D0%26srkp%3D001

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Home Accounts Contacts **Opportunities** Contracts Cases Service Call Reports Dashboards Documents

**New Opportunity**  
**Select Opportunity Record Type** [Help for this Page](#)

Select a record type for the new opportunity. To skip this page in the future, change your record type settings on your personal setup page.

**Select Opportunity Record Type**

Record Type of new record

- Long Project Sales
- Ad hoc Sales
- Long Project Sales
- Maint/Mon Sales
- Short Project Sales

Continue Cancel

**Available Opportunity Record Types**

Record Type Name	Description
<b>Ad hoc Sales</b>	For Post-Sales Services / Replacement of parts. Or for quotations using Pricebooks.
<b>Long Project Sales</b>	Deals that require more than 60 days, and/or worth more than SGD50K
<b>Maint/Mon Sales</b>	For Monitoring and Maintenance Service Sales
<b>Short Project Sales</b>	For deals that can either be closed within 60 days, and/or less than SGD50K

start

New Opportunity: ... Inbox - Microsoft Outlook Windows Media Player DEX - works! Microsoft Excel - SF... EN 4:12 PM

The screenshot displays the Salesforce CRM interface for editing an opportunity. The browser window shows the URL: https://emea.salesforce.com/0062000000C60ec/e?retURL=%2F0062000000C60ec. The page title is 'Opportunity Edit: Test -CCTV Syst for Building C L10-15'. The navigation bar includes links for Home, Dashboards, Reports, Leads, Accounts, Contacts, Products, Opportunities (selected), Sales Orders, Service Call, Documents, and Solutions. The 'Opportunity Edit' section has buttons for Save, Save & New, and Cancel. The 'Opportunity Information' section contains fields for Opportunity Owner (Dexine Hu), Opportunity Name (Test -CCTV Syst for Build), Account Name (TEST PAYING ACCT), Type (New Customer), Project Name (Test -CCTV Syst for Build), Territory (MNC), Sub-territory (Manufacturing), Facility Size (5001 to 10,000 sq ft), and Opportunity Currency (CNY - Chinese Yuan). The 'Opportunity Record Type' is Long Project Sales, with a Close Date of 31/05/2010 and a Stage of Prepare/Submit Quotation. The Probability (%) is 30, and the Lead Source is Customer Referral. The 'Proposal Summary' section shows a Grand Total (ASG/Esscor/ARH) of 10,000.00, a Forecast Category of Pipeline, and a Payment Method of Purchase. The 'Revenue Share' section shows a First Split of 100. Red circles highlight the Account Name, Opportunity Currency, Grand Total (ASG/Esscor/ARH), and Probability (%) fields.

Opportunity Edit: Test -CCTV Syst for Building C L10-15 ~ salesforce.com - Enterprise Edition - Windows Internet Explorer

https://emea.salesforce.com/0062000000C60ec/e?retURL=%2F0062000000C60ec

File Edit View Favorites Tools Help

Opportunity Edit: Test -C... x Opportunity Fields ~ salesfor...

salesforce.com sales

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Opportunity Edit Test -CCTV Syst for Building C L10-15 Help for this Page ?

Opportunity Edit Save Save & New Cancel

Opportunity Information = Required Information

Opportunity Owner Dexine Hu

Opportunity Name Test -CCTV Syst for Build

Account Name TEST PAYING ACCT

Type New Customer

Project Name Test -CCTV Syst for Build

Territory MNC

Sub-territory Manufacturing

Facility Size 5001 to 10,000 sq ft

Opportunity Currency CNY - Chinese Yuan

Opportunity Record Type Long Project Sales

Close Date 31/05/2010 [ 01/03/2010 ]

Stage Prepare/Submit Quotation

Probability (%) 30

Lead Source Customer Referral

Your Reference No

Proposal Summary

Grand Total (one-time)

Grand Total (ASG/Esscor/ARH) 10,000.00

Forecast Category Pipeline

Payment Method Purchase

Revenue Share

First Salesperson

Second Sales person

Third Sales person

First Split 100

Second Split

Third Split

start

Opportunity Edit: T... Inbox - Microsoft O... Windows Media Pla... DEX -works! Microsoft Excel - SF... EN 4:22 PM

a. **"Opportunity Name"** - should be meaningful in stating what system(s) are required, or even specific installation site/location

b. **"Opportunity Currency"** - Choose from picklist values of CNY/MYR/PHP/SGD/USD for the currency the Opp is quoted in

c. **"Probability%"** - Need to indicate and update Probability% (Opp greater or equals to 50% goes into your Sales Pipeline)

d. Free-text in the Grand Total sum (after discounts and taxes included) into the **"Grand Total(ASG/Esscor/ARH)"** field.

4. Click on "Attach File" to upload **PDF** format of your quotation/proposal. Click "Done" to complete.

