



Opportunity

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Edit

Create LTD

New SalesOps Request

Create Credit Opp

Delete

New Note



Account Name

Opportunity Owner

Billing Plan

Close Date

[Jordan Goldfeld](#)

Per Message: MTM Business Plan

3/21/2023

Requests

Use Dropbox Sign

Create Intake in RFPIO

Deal Explorer

Journey Explorer

Assign Team Member

Activity

Details

Chatter

Related

## ▼ ANNOUNCEMENT

ANNOUNCEMENT:

Starting at 5pm EDT on April 6, there will be a new flow for entering Trial-related data on New and Expansion Opportunities. Please see

<https://attentivemobile.atlassian.net/wiki/spaces/SW/pages/3536028440/Home+Page+Free+Trial+Salesforce+Opportunities+-+FY23+Overview> for updates, walk throughs, FAQs, and more

## ▼ Opportunity Information

Opportunity Name

Farm Rio France-Q1-23

Opportunity Owner

[Jordan Goldfeld](#)

Account Name

Account Owner

Jordan Goldfeld

Parent Account

Sales Source

[Shelby Levine](#)

Client Strategy Director

[Taryn Tomasula](#)

CS Source

Opportunity Type

Expansion

Sales Tier

AE SDR Alignment

SDR Sourced

Stage



## Opportunity Details

Finance Review Approval Status

NetSuite Sync Status

Start Date

4/7/2023

NetSuite Sync Error

End Date

6/30/2023

NetSuite Subscription Id

Cancellation Date

NetSuite Amendment Subscription Id

Bill Carrier Fees

Yes

Backfill

☒

Quarterly Commit?

Avg. Quarterly Commit

0

Payment Terms

Due on receipt

Shared Commitments

Tiered Pricing Detail



Products (0)



Opportunity Field History (3+)



Salesforce Search Bar



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## What is the reason for reassignment?

Reassignment Reason\*

- ☒ Assign to a different time zone
- ☐ Assign to next person in the RR

Next


← → ↺ ⬆

Title

http://lucidchart.com

🔍

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Which roles need to be reassigned?

Roles to Reassign\* ⓘ

}

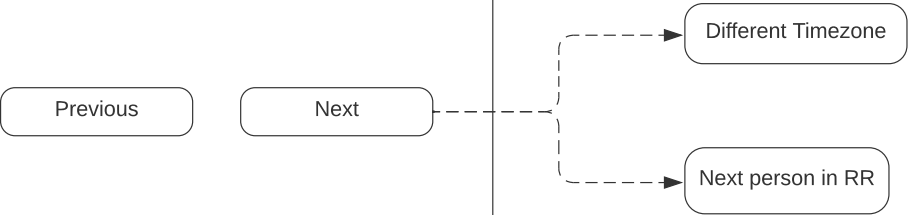
You may choose multiple roles to reassign at one time.

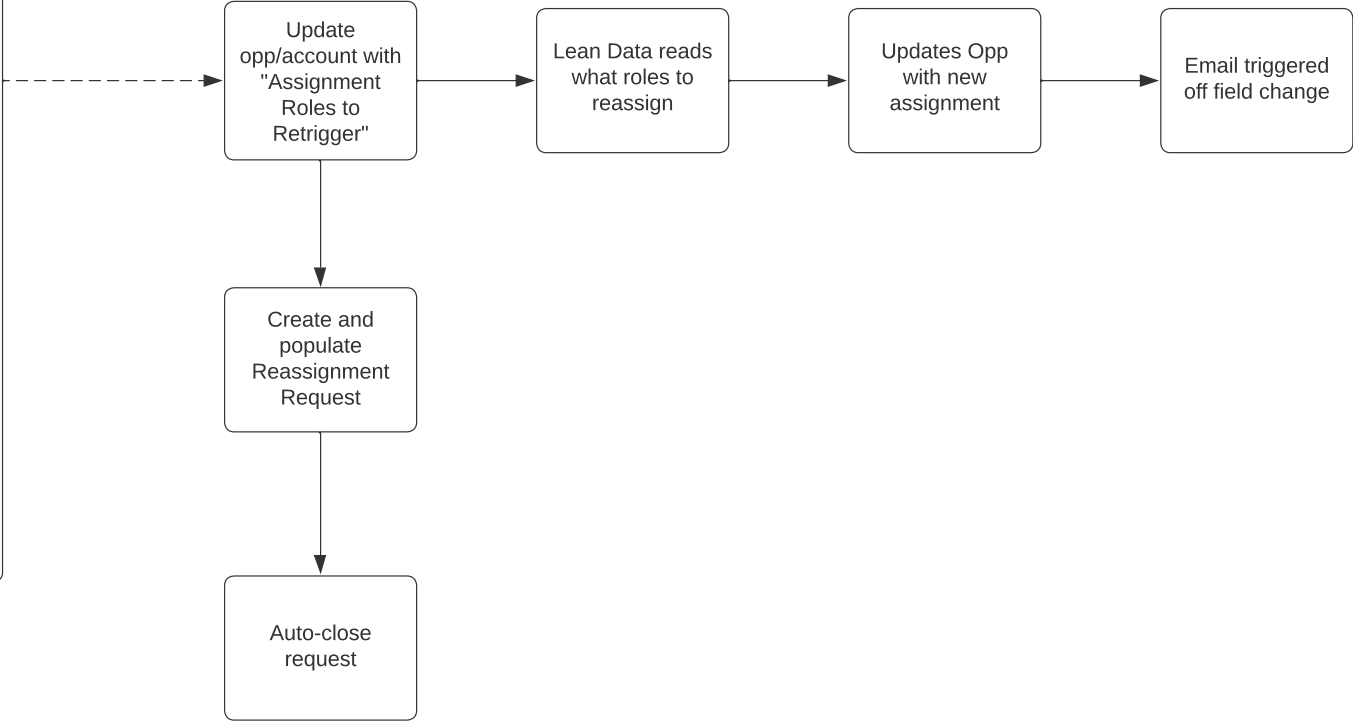
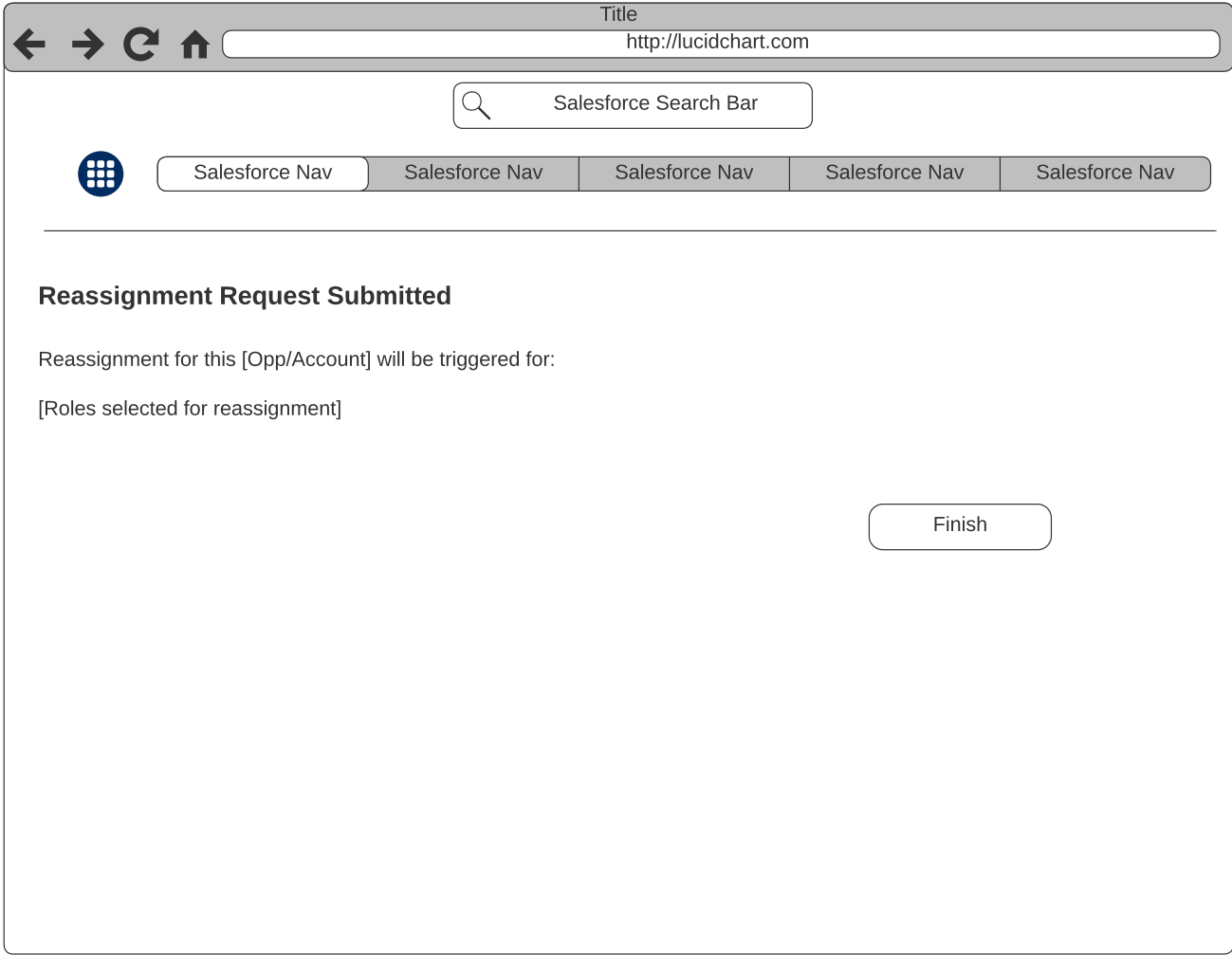
☒ Client Strategy Manager

☒ Implementation Specialist

Previous

Next





# Who will you like to appoint?

Navigate to Lean Data and choose the correct RR based on the following fields, prioritized in this order:

- Sales Tier: Tier 2
- New Vertical: Food & Beverage
- Time Zone (East vs West)

[Refer to this wiki page for more details](#)

Fill in the name of the next individual in the selected RR then click the "Next Assignment" button to ensure the next assignment will go to the next person in the RR.

## Client Strategy Manager

🔍

user lookup

## Implementation Specialsit

🔍

user lookup

Option will be dependent on what roles they selected in the previous page

Previous

Next

Override Field

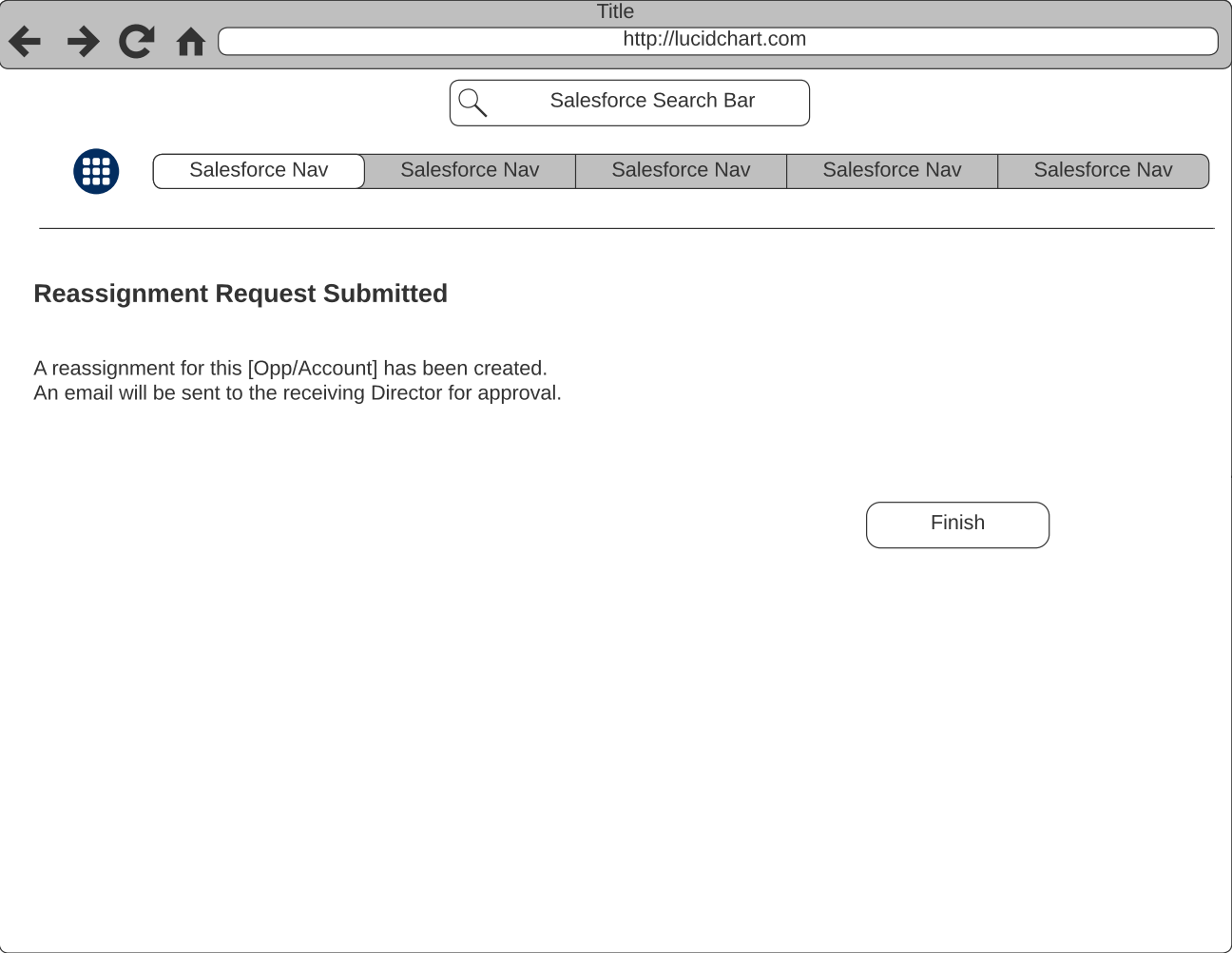
▼

East

West

Europe

APAC





## New Launch Reassignment - Approval Required for [Account Name]

[Account Name] just signed and has been assigned to your CSM/IMP for launch. Please approve or reject the request.

Below are some details about the opportunity:

**Customer Name:** Jane  
**CSM:** Greg Willis  
**CSM Director:** Emily Feldheim  
**Implementation Specialist:** Jordan Kruger  
**IS Director:** Mike Foresta  
**Owner:** John Affourtitt  
**Parent Account:**  
**Referring Partner + Program Mgmt:** SHINE Strategy

Combo

**New Vertical Name:** Retail/e-Commerce

**CS Tier:** Tier 1: > \$25k

**Sales Tier:** Tier 1

**eCommerce Platform:** Unknown

**Billing State:**

**Website:** [jane.com](http://jane.com)

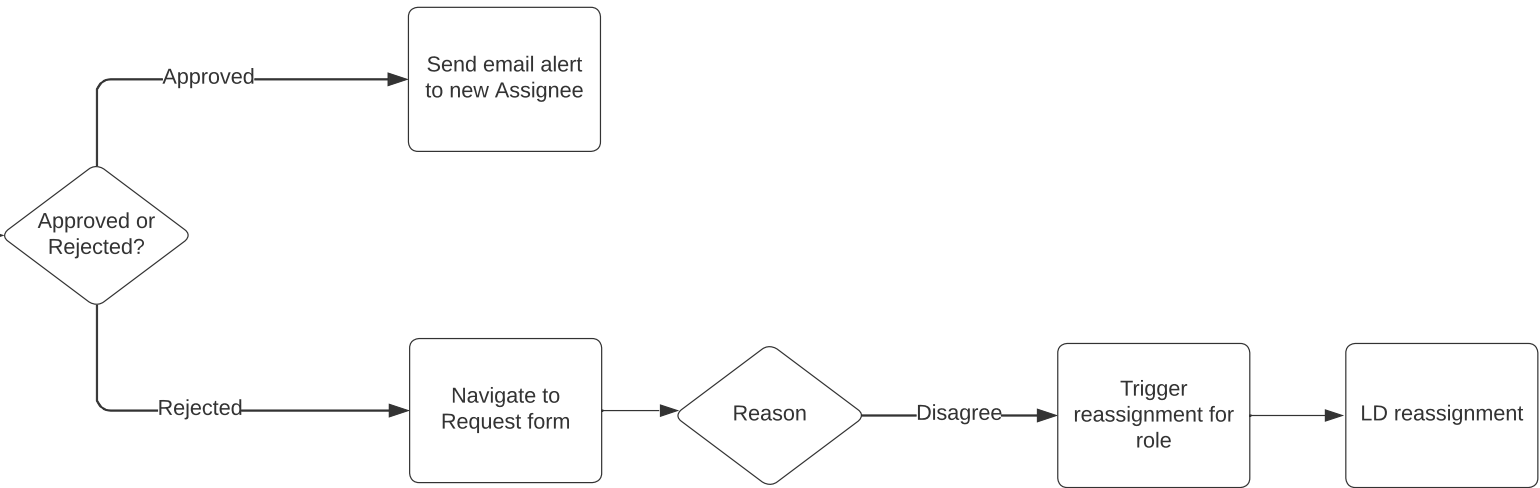
**ESP:** Wunderkind  
**Current SMS Vendor:** Wunderkind  
**Customer Data Platform:** None  
**CX Platform:** None  
**On-Site Email Capture:** Wunderkind  
**Loyalty:** None  
**Tag Management:** Google Tag Manager  
**Shortcode purchased:** Yes - non Vanity

[Link to Opp](#)

### Approve Reassignment

## Reject Reassignment

Rejecting an assignment does not remove your CSM or IS from the account/opp. To reassign the account/opp, create a new request form on the account/opp.



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Title

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[ROLE] Reassignment Request #123

Related

Details

Account Name

Opportunity

Assignment Level

Type/Category

Approver

Status

▼

Pending

Approved

Rejected

Note: Directors will receive an approval email with the "Approve" button and instructions to click a link to this request form to reject the assignment.

Assignee Role

Prev. Assignee

Created by

Create Date

New Assignee

Last modified by

Last modified date

New assignee field should only be visible on request types with appointed assignees

