KeyStone Opportunity Tab Training – Job Aid
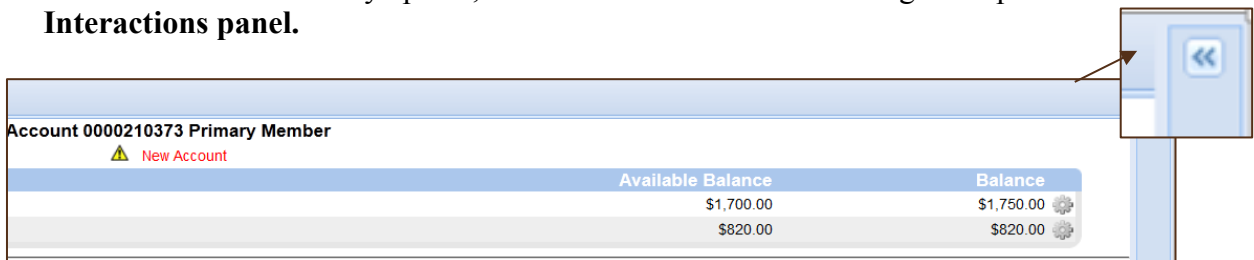
Training Objectives:
- Efficiently navigate KeyStone interface
- Accurately record conversations and referrals onto the Opportunity tab

Steps for recording a referral onto the Opportunity tab:

Instructions: Follow the steps below to insert a member Opportunity.

I.   Open a **Transaction** work area.
   A.   Search for the member.
   B.   In the "Account Summary" panel, click on the chevron to the far right to open the **Interactions panel.**

   C.   Once expanded, click on the green "Add Interaction" icon toward the bottom of the **Interactions** panel.

   D.   The **Interactions Options** pop-up window will display.
     1.   Add the opportunity by check marking the **Opportunity Options** box.
     2.   The **Default** and **Type** fields will populate.
     3.   In the **Description** field, enter a brief description of this interaction.
     4.   If desired, the **Explanation** field can be used to provide a detailed explanation of the interaction.
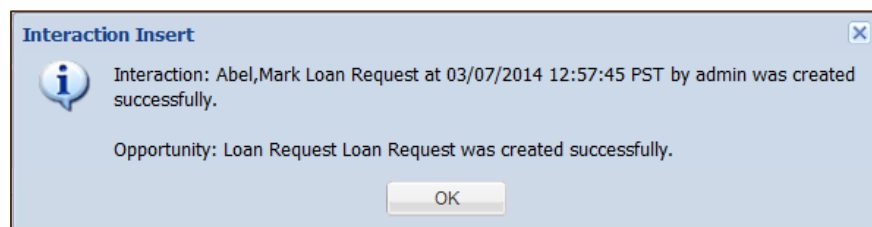
E. To queue the opportunity to a location other than the default queue, check the **Queue Options** box.
   1. In the **Work Queue** field, select the desired destination queue.
   2. If desired, the **User** field is used to identify a specific user to which the opportunity should be sent.
   3. If desired, the **Description** field can be used to further define the opportunity being queued.
   4. If desired, the **Priority** field can be used to identify the opportunity's priority.
      a. This is a number from -100 to +100.
   5. Click **Insert** to insert the opportunity.
F. In the **Interaction Insert** pop-up confirmation window, click **OK**.

Interaction Insert ✕

(i) Interaction: Abel,Mark Loan Request at 03/07/2014 12:57:45 PST by admin was created successfully.

Opportunity: Loan Request Loan Request was created successfully.

OK

G. The recently created opportunity will immediately display in the **Interactions** panel with an "Open Book" icon.
   1. If the **Default View** tab is not set to display open opportunities, click on the **Current** View tab and in the **Mode** field, press the down arrow on the keyboard to select *Interaction and Opportunity*.
   2. Click **OK**.