**“New Customer” Workflow [ORANGE colored banner]**

**Purpose** - - The purpose of the “New Customer” function is to ADD a completely new 3-in-1 “Company”, “Contact” and “Opportunity” record for a franchise. Please view the corresponding PowerPoint file that accompanies this document to see the mockup for the requirements identified here.

The numbered items in the listing below correspond to the numbers within the circles for the corresponding pages in the QuickStart PowerPoint requirements document. Also, the “tab order” for the application is the same as the numbers below [unless otherwise indicated].

1. Change the title of this module from “QuickStart” to be “QuickStart – New Customer”
2. Change the subtitle of this module from “Add 3 in 1” to be “Add 3-in-1: Company, Contact & Opportunity”
3. This should be a text field for the user to enter the new company’s name according to the following rules:
   1. The field should be required
4. This should be a text field for the user to enter the POC’s first name according to the following rules:
   1. The field should be required
5. This should be a text field for the user to enter the POC’s last name according to the following rules:
   1. The field should be required
6. This should be a text field for the user to enter the POC’s phone number
7. This should be a text field for the user to enter the POC’s email address
8. **[UPDATED]** This should be a drop down selection for the user to select the status of the opportunity and should be populated in accordance with the following rules:
   1. The field should be required
   2. The field should NOT be a drop-down/combo box since we do NOT want the user to have the ability to adjust any of the selections in the drop down menu
   3. The opportunity status choices should appear in this order:
      1. Suspect
      2. Prospect
      3. Qualification
      4. Assessment
      5. Needs Analysis
      6. Proposal/Price Quote
      7. Closed Won
      8. Closed Lost
   4. The “Tbl\_OpportunityStatus” table has been updated with another column for “Win Probability which will be used to populate the “Win Probability Percent” field once the “opportunity status” has been selected. The “Tbl\_OpportunityStatus.WinProbability” column has been updated with the following “probability” numbers:
      1. Suspect (0%)
      2. Prospect (15%)
      3. Qualification (25%)
      4. Assessment (50%)
      5. Needs Analysis (65%)
      6. Proposal/Price Quote (80%)
      7. Closed Won (100%)
      8. Closed Lost (0%)
   5. Additional functionality within QuickStart will be dependent upon the choice made for the Opportunity Status
   6. **NOTE:** When the “opportunity status” has been selected by the user, the “Win Probability Percent” field will be populated with the corresponding “WinProbability” percent from the “Tbl\_OpportunityStatus”.
9. This will be a combination type of field that is populated according to the following rules:
   1. The field should be required
   2. IF the “Opportunity Status” field is “Suspect” or “Prospect”, THEN this field is populated with a concatenation of the “Company Name” and the “Opportunity Status”, is editable by the user, and is populated as shown in the example below:

**IF**

* + 1. Company Name = “ABC Test Company”
    2. Opportunity Status = “Prospect”

**THEN**

* + 1. Opportunity Name = ABC Test Company – Prospect
  1. IF the “Opportunity Status” field is anything OTHER THAN “Suspect” or “Prospect”, then nothing will be populated in this field and the user will be able to enter their own opportunity name

1. The “Sales Rep Last Name” and “Sales Rep First Name” fields should be replaced in the GUI with a drop down field called “Sales Rep” as follows:
   1. The field label should be “Sales Rep”
   2. The field should be required
   3. Since the “sales rep” for any opportunity associated with this Franchise can ONLY be one of the Franchise members, this should be a drop down list instead of a “manual entry” field [having this as a drop down will avoid spelling errors when entering the data and will standardize the information for reporting]
   4. The drop down list should be a concatenation of the last name and first name of the Franchise members, shown in ascending alphabetical order based on last name
   5. The field in the GUI should have the “Please Select…” wording to be consistent with all of the other drop down fields
   6. The format for the drop down list should be: Lastname, Firstname
   7. When the record is saved, the sales rep data is written into the database into the separate “sales rep last name” and “sales rep first name” fields
2. This should be a text field for the user to enter the “pain” that the customer is trying to solve for in accordance with the following rules:
   1. The field should be required
3. This should be a text field for the user to enter the length of time the customer has been experiencing this issue
4. This should be a text field for the user to enter any alternative solution for solving the customers’ issues
5. This should be a NUMERICAL field for the user to enter the customer’s estimate on what this opportunity may cost
6. This should be a text field that allows the user to enter any pertinent notes associated to the opportunity [there will be an ability to have “historical” notes when the opportunity is being edited]
7. This is a drop down selection so the user can identify if a budget has been determined or not and should be populated in accordance with the following rules:
   1. The drop down menu choices should only be “Yes” or “No”
   2. The default value for this field should be “No”
   3. The field should NOT be a drop-down/combo box since we do NOT want the user to have the ability to adjust any of the selections in the drop down menu
8. This is a drop down selection so the user can identify if the customer wants to move forward and should be populated in accordance with the following rules:
   1. The drop down menu choices should only be “Yes” or “No”
   2. The default value for this field should be “No”
   3. The field should NOT be a drop-down/combo box since we do NOT want the user to have the ability to adjust any of the selections in the drop down menu
9. This is a drop-down / combo box for the identification of the “Product” being sold for this opportunity and should be populated in accordance with the following rules:
   1. This should be a required field since this data is important for reporting purposes
   2. The user should be able to choose one of the items from the list or add a new item to the list and select that newly added item
10. This is a drop-down / combo box for the identification of the “Opportunity Source” for this opportunity and should be populated in accordance with the following rules:
    1. This should be a required field since this data is important for reporting purposes
    2. The user should be able to choose one of the items from the list or add a new item to the list and select that newly added item
11. This is a drop-down / combo box for the identification of the “Opportunity Type” for this opportunity and should be populated in accordance with the following rules:
    1. This should be a required field since this data is important for reporting purposes
    2. The user should be able to choose one of the items from the list or add a new item to the list and select that newly added item
12. This should be a NUMERIC field for the user to enter the estimated value of the opportunity
13. **[UPDATED]** This should be a text field for the “Win Probability Percent” and should be populated in accordance with the following rules:
    1. This field should be named “Win Probability Percent” so that the user knows that they are just adding a number which is the “probability percentage” that this deal will close
    2. This field should be added after “Estimated Opportunity Value” (#21) and before “Weighted Opportunity Value” (#23)
    3. This field should be a required field
    4. When the “Opportunity Status” value is selected, this field will be populated in accordance with the following rules:
       1. The “Win Probability” value will be populated using the “win probability” value in the “Tbl\_OpportunityStatus.WinProbability” that corresponds to the “Opportunity Status” that was previously entered
       2. The field should be editable so that the user can change the “win probability” value as desired
    5. The probability value in this field should be multiplied by the “Estimated Opportunity Value” entered to compute the “Weighted Value”
    6. When the user “tabs” from one field to the next, the tab order should be from “Estimated Opportunity Value” (#21) to “Win Probability Percent” (#22) and then to “Next Step” (#24)
14. “Weighted Opportunity Value” field updates:
    1. This field should be named “Weighted Opportunity Value”
    2. This field should be added after “Win Probability Percent” and before “Next Step”
    3. This should be a non-editable field since it is a calculation of the “Estimated Opportunity Value” and the “Win Probability Percent” data that have been entered by the user
    4. When the user “tabs” from one field to the next, this field should NOT be available in the tab order since this is a non-editable field
15. This should be a text field for the user to enter the next actions that will be taken with this opportunity and should be populated in accordance with the following rules:
    1. This field should be a required since this is critically important for our dashboard information
16. This should be a DATE SELECTION field for the user to select the date of the next planned contact for this opportunity and should be populated in accordance with the following rules:
    1. This should be a required field since it is critically important for our dashboard information
    2. The field should be moved to be below the “Next Step” field and when the user “tabs” from one field to the next, the tab order should be “Next Step”, “Next Contact Date” and then “New Appointment?”
17. “New Appointment” field updates:
    1. This should be a required field
    2. Since the “Win Probability Percent” and “Weighted Value” fields are being added into the left-hand column in the “opportunity details” section of the page, the “New Appointment?” field and the “Appointment Source” field should be moved to the top of the right-hand column in the “opportunity details” section of this page
    3. The default setting for “New Appointment?” should be changed to “Yes” since the majority of time when a new customer and contact are being added, this will also be a new appointment
    4. When the user “tabs” from one field to the next, the tab order should be from “Next Contact Date” to “New Appointment?” and then to “Appointment Source”
    5. The drop down menu choices should only be “Yes” or “No”
    6. The default value for this field should be “No”
    7. The field should NOT be a drop-down/combo box since we do NOT want the user to have the ability to adjust any of the selections in the drop down menu
18. This is a drop-down / combo box for the identification of the “Appointment Source” for this opportunity and should be populated in accordance with the following rules:
    1. This should be a required field since this data is important for reporting purposes
    2. The user should be able to choose one of the items from the list or add a new item to the list and select that newly added item
19. “Who is Registered for Training” field updates:
    1. The name of this field label should be changed to “Who is Registered for Training” instead of just “Registered for Training” where we are capturing a “Yes/No” type of answer
    2. This will mean that the database structure will need to be changed for this field to be a “varchar” rather than a “bit” since this will now be a drop down list instead of just a “Yes or No” answer
    3. The following choices should be available for this drop down field [in this display order] and should NOT be editable by the user since the choice selected drives what happens in the fields in #29 thru 33:
       1. No one
       2. Individual
       3. Group
    4. The data being captured within this field [and the fields in #29 thru 33] will be written into a new table in the database as described here. The table should be called “Tbl\_Training”:

| **GUI Field** | **Column Description** | **Field Description** |
| --- | --- | --- |
| N/A | Tbl\_Training.Id | Unique identifier – (System generated when the record is created) |
| N/A | Tbl\_Training.OpportunityId | Int – (populated with the created opportunity ID) |
| N/A | Tbl\_Training.User | Varchar (50) – (populated with the concatenation of the “Company POC LastName, FirstName) |
| Course Type | Tbl\_Training.CourseId | Int – (populated with the tbl\_course.courseId value based upon the course type chosen) |
| Training Course Date | Tbl\_Training.CourseDate | Date – (populated with the date chosen by the user) |
| Training Course Name | Tbl\_Training.CourseName | Varchar(50) – (populated with the name of the training course entered by the user) |
| Training Course Location | Tbl\_Training.Location | Varchar(50) – (populated with the name of the training location entered by the user) |
| Class Head Count | Tbl\_Training.ClassHeadCount | Int, null – (populated by the user with the number of students when a “group” is being trained) |
| N/A | Tbl\_Training.CompanyId | Int – (populated with unique Id once company record is created) |
| N/A | Tbl\_Training.ContactId | Int – (populated with unique Id once contact record is created) |
| N/A | Tbl\_Training.CreatedBy | Varchar(50) – (populated with the logged in UserId when the record is created) |
| N/A | Tbl\_Training.CreatedDate | Date – (populated with the current date when the record is created) |
| N/A | Tbl\_Training.ModifiedBy | Varchar(50) – (populated with the logged in UserId when the record is modified) |
| N/A | Tbl\_Training.ModifiedDate | Date – (populated with the current date when the record is modified) |

1. **[UPDATED]** These three choices for “Course Type” are based upon the selection for “Who is Registered for Training?” and should be populated in accordance with the following rules:
   1. This will be a drop-down / combo box
   2. IF “No one” is the selected choice in the “Who is Registered for Training?” field, then the following rules apply:
      1. This field is NOT required
      2. This field is disabled since there will be no training associated with this opportunity
   3. IF “Individual” is the selected choice in the “Who is Registered for Training?” field, then the following rules apply:
      1. This field IS required
      2. The user will select one of the course types from the list that the “Company POC” will attend or will add a new item to the list and select that newly added item
   4. IF “Group” is the selected choice in the “Who is Registered for Training?” field, then the following rules apply:
      1. This field IS required
      2. The user will select one of the course types from the list that a group of members from the “Company” will attend or will add a new item to the list and select that newly added item
2. **[UPDATED]** These three choices for “Training Course Date” are based upon the selection for “Who is Registered for Training?” and should be populated in accordance with the following rules:
   1. IF “No one” is the selected choice in the “Who is Registered for Training?” field, then the following rules apply:
      1. This field is NOT required
      2. This field is disabled since there will be no training associated with this opportunity
   2. IF “Individual” is the selected choice in the “Who is Registered for Training?” field, then the following rules apply:
      1. This field IS required
      2. The user will select the date for the training course
   3. IF “Group” is the selected choice in the “Who is Registered for Training?” field, then the following rules apply:
      1. This field IS required
      2. The user will select the date for the training course
3. **[UPDATED]** These three choices for “Training Course Name” are based upon the selection for “Who is Registered for Training?” and should be populated in accordance with the following rules:
   1. IF “No one” is the selected choice in the “Who is Registered for Training?” field, then the following rules apply:
      1. This field is NOT required
      2. This field is disabled since there will be no training associated with this opportunity
   2. IF “Individual” is the selected choice in the “Who is Registered for Training?” field, then the following rules apply:
      1. This field IS required
      2. The user will enter the name of the training course
   3. IF “Group” is the selected choice in the “Who is Registered for Training?” field, then the following rules apply:
      1. This field IS required
      2. The user will enter the name of the training course
4. **[UPDATED]** These three choices for “Training Course Location” are based upon the selection for “Who is Registered for Training?” and should be populated in accordance with the following rules:
   1. IF “No one” is the selected choice in the “Who is Registered for Training?” field, then the following rules apply:
      1. This field is NOT required
      2. This field is disabled since there will be no training associated with this opportunity
   2. IF “Individual” is the selected choice in the “Who is Registered for Training?” field, then the following rules apply:
      1. This field IS required
      2. The user will enter the location of the training course [e.g. this could be the “Company”, the Sandler office, or some other “3rd party” location like a hotel]
   3. IF “Group” is the selected choice in the “Who is Registered for Training?” field, then the following rules apply:
      1. This field IS required
      2. The user will enter the location of the training course [e.g. this could be the “Company”, the Sandler office, or some other “3rd party” location like a hotel]
5. **[UPDATED]** These three choices for “Class Head Count” are based upon the selection for “Who is Registered for Training?” and should be populated in accordance with the following rules:
   1. IF “No one” is the selected choice in the “Who is Registered for Training?” field, then the following rules apply:
      1. This field is NOT required
      2. This field is disabled since there will be no training associated with this opportunity
   2. IF “Individual” is the selected choice in the “Who is Registered for Training?” field, then the following rules apply:
      1. This field IS required
      2. The user will enter “1” in the class head count since there will only be one individual attending the training
   3. IF “Group” is the selected choice in the “Who is Registered for Training?” field, then the following rules apply:
      1. This field IS required
      2. The user will enter the total number of students that are planned to attend the training
6. This is a drop down selection so the user can identify if this is a new “Company” and should be populated in accordance with the following rules:
   1. The drop down menu choices should only be “Yes” or “No”
   2. The default value for this field should be “Yes” since we are adding a new customer
   3. The field should NOT be a drop-down/combo box since we do NOT want the user to have the ability to adjust any of the selections in the drop down menu
7. This is a drop-down / combo box for the identification of the “Industry” type for the Company in this opportunity and should be populated in accordance with the following rules:
   1. This should be a required field since this data is important for reporting purposes
   2. The user should be able to choose one of the items from the list or add a new item to the list and select that newly added item
8. This should be a DATE SELECTION field for the user to select the estimated close date of the opportunity and should be populated in accordance with the following rules:
   1. This should be a required field since it is critically important for reporting purposes
9. This is a choice between “Clear” and “Save” and should be acted upon in accordance with the following rules:
   1. Before the record can be saved, we must first check the database to see if the same EXACT spelling of the “Company Name” already exists in the database.
   2. When the user clicks “Clear”, all of the data selected within all of the fields will be erased [except for those fields that have a “default” value established – those fields will revert back to their default values]
   3. When the user clicks “Save”, go to the “Save” popup #1 described in items #38 and #39
10. If the user clicks this “Save” button, the opportunity record will be written and the appropriate “company” record data that may already exist will be over-written with the data in this record. The user will then go to the “Save” popup #2 described in item #40.
11. If the user clicks this “Edit” button, the opportunity record will not be written and the user will be taken back to the “Company Name” field so that it can be changed.
12. Once the user gets to this “Save” popup #2, they will be provided with the opportunity to send a meeting invitation based upon the “Next Step” and “Next Contact Date” fields entered within this opportunity record in accordance with the following rules:
    1. If the user selects “Yes”, the record will be saved and the “send email” function will open in a new tab with the following information populated:
       1. User email address [from the “email” field in this record]
       2. Email Subject [from the “Next Step” field in this record]
       3. Date of the meeting [from the “Next Contact Date” field in this record]
    2. If the user selects “Yes”, the original tab will still be open with the new opportunity 3-in-1 record there and the user will be taken to the “Save” popup #3 screen as shown in item #41
    3. If the user selects “No”, they will be taken to the “Save” popup #3 screen as shown in item #41
13. Once the user gets to this “Save” popup #3, they will be provided with the choice to create another opportunity for this same company in accordance with the following rules:
    1. If the user selects “Yes”, they will be taken back to the “Existing Customer” [aka “opportunity edit” function] and the company information will already be populated in that “Existing Customer” screen
    2. If the user selects “No”, the workflow will end and the user will be able to select any other option from the left navigation of the application

**“Existing Customer” Workflow [GREEN colored banner]**

**Purpose** - - The purpose of the “Existing Customer” function is to EITHER EDIT an existing “Contact” and/or “Opportunity” for a selected “Company” OR to ADD a new “Contact” and/or “Opportunity” for a selected “Company. Please view the corresponding PowerPoint file that accompanies this document to see the mockup for the requirements identified here.

The numbered items in the listing below correspond to the numbers within the circles for the corresponding pages in the QuickStart PowerPoint requirements document. Also, the “tab order” for the application is the same as the numbers below [unless otherwise indicated].

1. Change the title of this module from “QuickStart” to be “QuickStart – Existing Customer”
2. Change the subtitle of this module from “Edit Opportunity” to be “Edit Existing [or Add New] Contact & Opportunity”
3. This should be a drop down selection for the user to identify whether they will be editing an existing opportunity, or adding a new opportunity, for the selected customer, then:
   1. The field should be required
   2. The choices should be listed in this order:
      1. Edit existing opportunity
      2. Add new opportunity
   3. The field should NOT be a drop-down/combo box since we do NOT want the user to have the ability to adjust any of the selections in the drop down menu
4. This should be a drop down selection for the user to choose a “Company” so they can either “edit” an existing opportunity or “add” a new one. The field should be populated based upon the choice selected in the “Edit Existing or Add New” field as follows:
   1. IF “Edit existing opportunity” is the selected choice, then:
      1. The field is populated with ONLY the list of companies that HAVE an opportunity associated with them (this will provide the user with a filtered list of ONLY those Companies that actually have opportunities that can be edited)
   2. IF “Add new opportunity” is the selected choice, then:
      1. The field is populated with a list of ALL of the companies (this will provide the user with the ability to add an opportunity to ANY ONE of the companies – even if they already have an opportunity for that company)
   3. The field should be required
   4. The field should NOT be a drop-down/combo box since we do NOT want the user to have the ability to adjust any of the selections in the drop down menu
5. This will be a drop-down/combo box that is populated according to the following rules:
   1. The field should be required
   2. IF the selection in the “Edit Existing or Add New” field is “Edit existing opportunity”, then:
      1. The field will be populated with the opportunity names for ALL of the opportunities for the selected company
   3. IF the selection in the “Edit Existing or Add New” field is “Add new opportunity”, then:
      1. The field will be blank which will allow the user to enter a new opportunity name
6. This should be a drop down selection for the user to select the status of the opportunity and it should be populated according to the following rules:
   1. The field should be required
   2. The field should NOT be a drop-down/combo box since we do NOT want the user to have the ability to adjust any of the selections in the drop down menu
   3. IF the selection in the “Edit Existing or Add New” field is “Edit existing opportunity” and the user has selected a specific opportunity, then:
      1. The field will be populated with the opportunity status for the selected opportunity
      2. The user will be able to choose a different opportunity status
   4. IF the selection in the “Edit Existing or Add New” field is “Add new opportunity” then the opportunity status choices should appear in this order for the user to select from:
      1. Suspect
      2. Prospect
      3. Qualification
      4. Assessment
      5. Needs Analysis
      6. Proposal/Price Quote
      7. Closed Won
      8. Closed Lost
   5. **NOTE:** When the status has been set to “Closed Won”, then the following rules will apply:
      1. The “Actual Opportunity Value” field will become required and will be editable
      2. The “Actual Close Date” field will become required, and will be filled in with the current date, and will be editable
   6. **NOTE:** When the status has been set to “Closed Lost”, then the following rules will apply:
      1. The “Actual Close Date” field will become required, and will be filled in with the current date, and will be editable
      2. The “Why Was Opportunity Lost?” field will become required and will be editable
7. Whether the user is “editing” an existing opportunity or “adding” a new one, this should be a drop-down/combo box field and should be populated according to the following rules:
   1. The field should be required
   2. The drop down list will contain the “first name” of every “Contact” for the selected “Company” and the “first name” of the POC from the selected opportunity for the selected company will be what is displayed in the field
   3. IF the user wants to keep the existing “POC First Name” – then they will take no further action
   4. IF the user wants to change the existing “POC First Name”, then:
      1. They will be able to choose another “first name” from the list of the “Contacts” for the selected “Company”
      2. They will be able to enter a new “first name” into the field
8. Whether the user is “editing” an existing opportunity or “adding” a new one, this should be a drop-down/combo box field and should be populated according to the following rules:
   1. The field should be required
   2. The drop down list will contain the “last name” of every “Contact” for the selected “Company” and the “first name” of the POC from the selected opportunity for the selected company will be what is displayed in the field
   3. IF the user wants to keep the existing “POC Last Name” – then they will take no further action
   4. IF the user wants to change the existing “POC Last Name”, then:
      1. They will be able to choose another “last name” from the list of the “Contacts” for the selected “Company”
      2. They will be able to enter a new “last name” into the field
9. Whether the user is “editing” an existing opportunity or “adding” a new one, this should be a text field and should be populated according to the following rules:
   1. The field should NOT be required
   2. The field should be populated with the “phone number” of the selected POC
   3. If no phone number exists for the selected POC, then the field will be blank
   4. The user should be able to change the existing phone number [or enter a new one if the field is blank]
10. Whether the user is “editing” an existing opportunity or adding a new one, this should be a drop-down/combo box field and should be populated according to the following rules:
    1. The field should NOT be required
    2. The field should be populated with the “email address” of the selected POC
    3. If no email address exists for the selected POC, then the field will be blank
    4. The user should be able to change the existing email address [or enter a new one if the field is blank]
11. This should be a drop down field and should be populated according to the following rules:
    1. The field should be required
    2. The field should NOT be a drop-down/combo box since we do NOT want the user to have the ability to adjust any of the selections in the drop down menu
    3. IF the selection in the “Edit Existing or Add New” field is “Edit existing opportunity” and the user has selected a specific opportunity, then:
       1. The drop down list should be a concatenation of the last name and first name of the Franchise members, shown in ascending alphabetical order based on last name and the name of the sales rep for the existing record should be displayed in the field
       2. The user will be able to choose a different “sales rep” from the drop down list
    4. IF the selection in the “Edit Existing or Add New” field is “Add new opportunity”, then:
       1. The drop down list should be a concatenation of the last name and first name of the Franchise members, shown in ascending alphabetical order based on last name
       2. The user will be able to select one of the “sales reps” from the drop down list
12. This should be a text field and should be populated according to the following rules:
    1. The field should be required
    2. IF the selection in the “Edit Existing or Add New” field is “Edit existing opportunity” and the user has selected a specific opportunity, then:
       1. The field will be populated with the “pain” data from the selected opportunity
       2. The user will be able to edit the data within the field as desired
    3. IF the selection in the “Edit Existing or Add New” field is “Add new opportunity” then:
       1. The field will be empty
       2. The user will need to fill in the appropriate data within the field
13. This should be a text field and should be populated according to the following rules:
    1. The field should NOT be required
    2. IF the selection in the “Edit Existing or Add New” field is “Edit existing opportunity” and the user has selected a specific opportunity, then:
       1. The field will be populated with the “length of problem?” data from the selected opportunity
       2. The user will be able to edit the data within the field as desired
    3. IF the selection in the “Edit Existing or Add New” field is “Add new opportunity” then:
       1. The field will be empty
       2. The user will be able to fill in the appropriate data within the field as desired
14. This should be a text field and should be populated according to the following rules:
    1. The field should NOT be required
    2. IF the selection in the “Edit Existing or Add New” field is “Edit existing opportunity” and the user has selected a specific opportunity, then:
       1. The field will be populated with the “alternatives?” data from the selected opportunity
       2. The user will be able to edit the data within the field as desired
    3. IF the selection in the “Edit Existing or Add New” field is “Add new opportunity” then:
       1. The field will be empty
       2. The user will be able to fill in the appropriate data within the field as desired
15. This should be a NUMERICAL field and should be populated according to the following rules:
    1. The field should NOT be required
    2. IF the selection in the “Edit Existing or Add New” field is “Edit existing opportunity” and the user has selected a specific opportunity, then:
       1. The field will be populated with the “perceived cost to fix?” data from the selected opportunity
       2. The user will be able to edit the data within the field as desired
    3. IF the selection in the “Edit Existing or Add New” field is “Add new opportunity” then:
       1. The field will be empty
       2. The user will be able to fill in the appropriate data within the field as desired
16. This should be a text field and should be populated according to the following rules:
    1. The field should NOT be required
    2. IF the selection in the “Edit Existing or Add New” field is “Edit existing opportunity” and the user has selected a specific opportunity, then:
       1. The field will be populated with the “notes” data from the selected opportunity
       2. The user will be able to edit the data within the field as desired
       3. **NOTE:** When the record is being saved and the “notes” field has been updated by the user, then:
          1. The existing “notes” data in the “Tbl\_Opportunities.Notes” field within the database will FIRST be copied to the “Notes” field within the “Tbl\_OpportunitiesHistory.Notes” table
          2. The newly entered “notes” will be written to the “Notes” field within the “Tbl\_Opportunities” table
    3. IF the selection in the “Edit Existing or Add New” field is “Add new opportunity” then:
       1. The field will be empty
       2. The user will be able to fill in the appropriate data within the field as desired
17. This is a drop down selection so the user can identify if a budget has been determined or not and should be populated according to the following rules:
    1. The drop down menu choices should only be “Yes” or “No”
    2. The field should NOT be required
    3. The field should NOT be a drop-down/combo box since we do NOT want the user to have the ability to adjust any of the selections in the drop down menu
    4. IF the selection in the “Edit Existing or Add New” field is “Edit existing opportunity” and the user has selected a specific opportunity, then:
       1. The field will be populated with the “Budget Identified?” data from the selected opportunity
       2. The user will be able to choose a different selection as desired from the drop down list
    5. IF the selection in the “Edit Existing or Add New” field is “Add new opportunity” then:
       1. The field will be defaulted with “No”
       2. The user will be able to choose a different selection as desired from the drop down list
18. This is a drop down selection so the user can identify if the customer wants to move forward or not and should be populated according to the following rules:
    1. The drop down menu choices should only be “Yes” or “No”
    2. The field should NOT be required
    3. The field should NOT be a drop-down/combo box since we do NOT want the user to have the ability to adjust any of the selections in the drop down menu
    4. IF the selection in the “Edit Existing or Add New” field is “Edit existing opportunity” and the user has selected a specific opportunity, then:
       1. The field will be populated with the “Move Forward?” data from the selected opportunity
       2. The user will be able to choose a different selection as desired from the drop down list
    5. IF the selection in the “Edit Existing or Add New” field is “Add new opportunity” then:
       1. The field will be defaulted with “No”
       2. The user will be able to choose a different selection as desired from the drop down list
19. This is a drop-down / combo box for the identification of the “Product” being sold for this opportunity and should be populated according to the following rules:
    1. This should be a required field since this data is important for reporting purposes
    2. IF the selection in the “Edit Existing or Add New” field is “Edit existing opportunity” and the user has selected a specific opportunity, then:
       1. The field will be populated with the “Product” data from the selected opportunity
       2. The user will be able to choose a different selection from the list or add a new item to the list and select that newly added item as desired
    3. IF the selection in the “Edit Existing or Add New” field is “Add new opportunity” then:
       1. The field will be empty
       2. The user will be able to choose a selection from the list or add a new item to the list and select that newly added item as desired
20. This is a drop-down / combo box for the identification of the “Opportunity Source” for this opportunity and should be populated according to the following rules:
    1. This should be a required field since this data is important for reporting purposes
    2. IF the selection in the “Edit Existing or Add New” field is “Edit existing opportunity” and the user has selected a specific opportunity, then:
       1. The field will be populated with the “Opportunity Source” data from the selected opportunity
       2. The user will be able to choose a different selection from the list or add a new item to the list and select that newly added item as desired
    3. IF the selection in the “Edit Existing or Add New” field is “Add new opportunity” then:
       1. The field will be empty
       2. The user will be able to choose a selection from the list or add a new item to the list and select that newly added item as desired
21. This is a drop-down / combo box for the identification of the “Opportunity Type” for this opportunity and should be populated according to the following rules:
    1. This should be a required field since this data is important for reporting purposes
    2. IF the selection in the “Edit Existing or Add New” field is “Edit existing opportunity” and the user has selected a specific opportunity, then:
       1. The field will be populated with the “Opportunity Type” data from the selected opportunity
       2. The user will be able to choose a different selection from the list or add a new item to the list and select that newly added item as desired
    3. IF the selection in the “Edit Existing or Add New” field is “Add new opportunity” then:
       1. The field will be empty
       2. The user will be able to choose a selection from the list or add a new item to the list and select that newly added item as desired
22. This should be a NUMERIC field for the user to enter the “estimated value” of the opportunity and should be populated according to the following rules:
    1. This should be a required field since this data is important for reporting purposes
    2. IF the selection in the “Edit Existing or Add New” field is “Edit existing opportunity” and the user has selected a specific opportunity, then:
       1. The field will be populated with the “Estimated Opportunity Value” data from the selected opportunity
       2. The user will be able to edit the data as desired
    3. IF the selection in the “Edit Existing or Add New” field is “Add new opportunity” then:
       1. The field will be empty
       2. The user will be able to fill in the data as desired
23. This should be a NUMERIC field for the user to enter the “actual value” of the opportunity and should be populated according to the following rules:
    1. This field will ONLY be required and ONLY editable if the “Opportunity Status” field has been set to “Closed Won”
24. This should be a text field for the “Win Probability Percent” and should be populated in accordance with the following rules:
    1. IF the selection in the “Edit Existing or Add New” field is “Edit existing opportunity” and the user has selected a specific opportunity, then:
       1. The field will be populated with the “Win Probability Percent” data from the selected opportunity
       2. The user will be able to edit the data as desired
    2. IF the selection in the “Edit Existing or Add New” field is “Add new opportunity” then:
       1. The “Win Probability” value will be populated using the “win probability” value in the “Tbl\_OpportunityStatus.WinProbability” that corresponds to the “Opportunity Status” that was previously entered
       2. The field should be editable so that the user can change the “win probability” value as desired
    3. The probability value in this field should be multiplied by the “Estimated Opportunity Value” entered to compute the “Weighted Value”
    4. When the user “tabs” from one field to the next, the tab order should be from “Estimated Opportunity Value” (#22) to “Win Probability Percent” (#24) and then to “Next Step” (#26)
25. This field should be populated according to the following rules:
    1. This should be a non-editable field since it is a calculation of the “Estimated Opportunity Value” multiplied by the “Win Probability Percent” data that have been entered by the user
    2. When the user “tabs” from one field to the next, this field should NOT be available in the tab order since this is a non-editable field
26. This should be a text field for the user to enter the next actions that will be taken with this opportunity and should be populated in accordance with the following rules:
    1. This field should be a required since this is critically important for our dashboard information
    2. IF the selection in the “Edit Existing or Add New” field is “Edit existing opportunity” and the user has selected a specific opportunity, then:
       1. The field will be populated with the “Next Step” data from the selected opportunity
       2. The user will be able to edit the data as desired
    3. IF the selection in the “Edit Existing or Add New” field is “Add new opportunity” then:
       1. The field will be empty
       2. The user will be able to fill in the data as desired
27. This should be a DATE SELECTION field for the user to enter the date of the next planned contact for this opportunity and the field should be populated in accordance with the following rules:
    1. This field should be a required since this is critically important for our dashboard information
    2. IF the selection in the “Edit Existing or Add New” field is “Edit existing opportunity” and the user has selected a specific opportunity, then:
       1. The field will be populated with the “Next Contact Date” data from the selected opportunity
       2. The user will be able to edit the data as desired
    3. IF the selection in the “Edit Existing or Add New” field is “Add new opportunity” then:
       1. The field will be empty
       2. The user will be able to fill in the data as desired
28. This should be a drop down field for the user to select whether this is a new appointment or not and the field should be populated in accordance with the following rules:
    1. This field should be a required since this is critically important for our dashboard information
    2. The drop down menu choices should only be “Yes” or “No”
    3. IF the selection in the “Edit Existing or Add New” field is “Edit existing opportunity” and the user has selected a specific opportunity, then:
       1. The field will be populated with the “New Appointment?” data from the selected opportunity
       2. The user will be able to select either “Yes” or “No” as desired
    4. IF the selection in the “Edit Existing or Add New” field is “Add new opportunity” then:
       1. The field will be defaulted to “Yes”
       2. The user will be able to select “No” if desired
    5. The field should NOT be a drop-down/combo box since we do NOT want the user to have the ability to adjust any of the selections in the drop down menu
29. This is a drop-down / combo box for the identification of the “Appointment Source” for this opportunity and the field should be populated in accordance with the following rules:
    1. This should be a required field since this data is important for reporting purposes
    2. IF the selection in the “Edit Existing or Add New” field is “Edit existing opportunity” and the user has selected a specific opportunity, then:
       1. The field will be populated with the “Appointment Source” data from the selected opportunity
       2. The user will be able to change to one of the other items from the list or add a new item to the list and select that newly added item
    3. IF the selection in the “Edit Existing or Add New” field is “Add new opportunity” then:
       1. The field will be empty
       2. The user will be able to choose one of the items from the list or add a new item to the list and select that newly added item
30. “Who is Registered for Training” field updates:
    1. This should NOT be a required field
    2. The following choices should be available for this drop down field [in this display order] and should NOT be editable by the user since the choice selected drives what happens in the fields in #31 thru 35:
       1. No one
       2. Individual
       3. Group
    3. The data being captured within this field [and the fields in #31 thru 35] will be written into the “Tbl\_Training” table in the database
    4. IF the selection in the “Edit Existing or Add New” field is “Edit existing opportunity” and the user has selected a specific opportunity, then:
       1. The field will be populated with the “Who is Registered for Training?” data from the selected opportunity
       2. The user will be able to change to one of the other items from the list as desired
    5. IF the selection in the “Edit Existing or Add New” field is “Add new opportunity” then:
       1. The field will be empty
       2. The user will be able to choose one of the items from the list as desired
31. The three choices for “Course Type” are based upon the selection for “Who is Registered for Training?” and should be populated in accordance with the following rules:
    1. IF the selection in the “Edit Existing or Add New” field is “Edit existing opportunity” and the user has selected a specific opportunity, then:
       1. The field will be populated with the “Course Type” data from the selected opportunity
       2. The user will be able to change to one of the other items from the list as desired in accordance with the following rules:
          1. IF “No one” is the selected choice for the “Who is Registered for Training?” field, then the following rules apply:
             1. This field is NOT required
             2. This field is disabled since there will be no training associated with this opportunity
          2. IF “Individual” is the selected choice for the “Who is Registered for Training?” field, then the following rules apply:
             1. This field IS required
             2. The user will select one of the course types from the list that the “Company POC” will attend or will add a new item to the list and select that newly added item
          3. IF “Group” is the selected choice for the “Who is Registered for Training?” field, then the following rules apply:
             1. This field IS required
             2. The user will select one of the course types from the list that a group of members from the “Company” will attend or will add a new item to the list and select that newly added item
    2. IF the selection in the “Edit Existing or Add New” field is “Add new opportunity” then:
       1. The field will be empty
       2. The user will be able to choose one of the items from the list as desired in accordance with the following rules:
          1. IF “No one” is the selected choice for the “Who is Registered for Training?” field, then the following rules apply:
             1. This field is NOT required
             2. This field is disabled since there will be no training associated with this opportunity
          2. IF “Individual” is the selected choice for the “Who is Registered for Training?” field, then the following rules apply:
             1. This field IS required
             2. The user will select one of the course types from the list that the “Company POC” will attend or will add a new item to the list and select that newly added item
          3. IF “Group” is the selected choice for the “Who is Registered for Training?” field, then the following rules apply:
             1. This field IS required
             2. The user will select one of the course types from the list that a group of members from the “Company” will attend or will add a new item to the list and select that newly added item
32. The three choices for “Training Course Date” are based upon the selection for “Who is Registered for Training?” and should be populated in accordance with the following rules:
    1. IF the selection in the “Edit Existing or Add New” field is “Edit existing opportunity” and the user has selected a specific opportunity, then:
       1. The field will be populated with the “Training Course Date” from the selected opportunity
       2. The user will be able to change the date as desired in accordance with the following rules:
          1. IF “No one” is the selected choice for the “Who is Registered for Training?” field, then the following rules apply:
             1. This field is NOT required
             2. This field is disabled since there will be no training associated with this opportunity
          2. IF “Individual” is the selected choice for the “Who is Registered for Training?” field, then the following rules apply:
             1. This field IS required
             2. The user will have the ability to select a different date for the training course
          3. IF “Group” is the selected choice for the “Who is Registered for Training?” field, then the following rules apply:
             1. This field IS required
             2. The user will have the ability to select a different date for the training course
    2. IF the selection in the “Edit Existing or Add New” field is “Add new opportunity” then:
       1. The field will be empty
       2. The user will be able to choose the date desired in accordance with the following rules:
          1. IF “No one” is the selected choice for the “Who is Registered for Training?” field, then the following rules apply:
             1. This field is NOT required
             2. This field is disabled since there will be no training associated with this opportunity
          2. IF “Individual” is the selected choice for the “Who is Registered for Training?” field, then the following rules apply:
             1. This field IS required
             2. The user will select the date for the training course
          3. IF “Group” is the selected choice for the “Who is Registered for Training?” field, then the following rules apply:
             1. This field IS required
             2. The user will select the date for the training course
33. The three choices for “Training Course Name” are based upon the selection for “Who is Registered for Training?” and should be populated in accordance with the following rules:
    1. IF the selection in the “Edit Existing or Add New” field is “Edit existing opportunity” and the user has selected a specific opportunity, then:
       1. The field will be populated with the “Training Course Name” data from the selected opportunity
       2. The user will be able to change the date as desired in accordance with the following rules:
          1. IF “No one” is the selected choice for the “Who is Registered for Training?” field, then the following rules apply:
             1. This field is NOT required
             2. This field is disabled since there will be no training associated with this opportunity
          2. IF “Individual” is the selected choice for the “Who is Registered for Training?” field, then the following rules apply:
             1. This field IS required
             2. The user will have the ability to edit the “Training Course Name” for the training course
          3. IF “Group” is the selected choice for the “Who is Registered for Training?” field, then the following rules apply:
             1. This field IS required
             2. The user will have the ability to edit the “Training Course Name” for the training course
    2. IF the selection in the “Edit Existing or Add New” field is “Add new opportunity” then:
       1. The field will be empty
       2. The user will be able to choose the date desired in accordance with the following rules:
          1. IF “No one” is the selected choice for the “Who is Registered for Training?” field, then the following rules apply:
             1. This field is NOT required
             2. This field is disabled since there will be no training associated with this opportunity
          2. IF “Individual” is the selected choice for the “Who is Registered for Training?” field, then the following rules apply:
             1. This field IS required
             2. The user will enter the “Training Course Name” for the training course
          3. IF “Group” is the selected choice for the “Who is Registered for Training?” field, then the following rules apply:
             1. This field IS required
             2. The user will enter the “Training Course Name” for the training course
34. The three choices for “Training Course Location” are based upon the selection for “Who is Registered for Training?” and should be populated in accordance with the following rules:
    1. IF the selection in the “Edit Existing or Add New” field is “Edit existing opportunity” and the user has selected a specific opportunity, then:
       1. The field will be populated with the “Training Course Location” data from the selected opportunity
       2. The user will be able to change the date as desired in accordance with the following rules:
          1. IF “No one” is the selected choice for the “Who is Registered for Training?” field, then the following rules apply:
             1. This field is NOT required
             2. This field is disabled since there will be no training associated with this opportunity
          2. IF “Individual” is the selected choice for the “Who is Registered for Training?” field, then the following rules apply:
             1. This field IS required
             2. The user will have the ability to edit the “Training Course Location” for the training course [e.g. this could be the “Company”, the Sandler office, or some other “3rd party” location like a hotel]
          3. IF “Group” is the selected choice for the “Who is Registered for Training?” field, then the following rules apply:
             1. This field IS required
             2. The user will have the ability to edit the “Training Course Location” for the training course [e.g. this could be the “Company”, the Sandler office, or some other “3rd party” location like a hotel]
    2. IF the selection in the “Edit Existing or Add New” field is “Add new opportunity” then:
       1. The field will be empty
       2. The user will be able to choose the date desired in accordance with the following rules:
          1. IF “No one” is the selected choice for the “Who is Registered for Training?” field, then the following rules apply:
             1. This field is NOT required
             2. This field is disabled since there will be no training associated with this opportunity
          2. IF “Individual” is the selected choice for the “Who is Registered for Training?” field, then the following rules apply:
             1. This field IS required
             2. The user will enter the “Training Course Location” for the training course [e.g. this could be the “Company”, the Sandler office, or some other “3rd party” location like a hotel]
          3. IF “Group” is the selected choice for the “Who is Registered for Training?” field, then the following rules apply:
             1. This field IS required
             2. The user will enter the “Training Course Name” for the training course [e.g. this could be the “Company”, the Sandler office, or some other “3rd party” location like a hotel]
35. The three choices for “Class Head Count” are based upon the selection for “Who is Registered for Training?” and should be populated in accordance with the following rules:
    1. IF the selection in the “Edit Existing or Add New” field is “Edit existing opportunity” and the user has selected a specific opportunity, then:
       1. The field will be populated with the “Class Head Count” data from the selected opportunity
       2. The user will be able to change the date as desired in accordance with the following rules:
          1. IF “No one” is the selected choice for the “Who is Registered for Training?” field, then the following rules apply:
             1. This field is NOT required
             2. This field is disabled since there will be no training associated with this opportunity
          2. IF “Individual” is the selected choice for the “Who is Registered for Training?” field, then the following rules apply:
             1. This field IS required
             2. The user will have the ability to edit the “Class Head Count” for the training course
          3. IF “Group” is the selected choice for the “Who is Registered for Training?” field, then the following rules apply:
             1. This field IS required
             2. The user will have the ability to edit the “Class Head Count” for the training course
    2. IF the selection in the “Edit Existing or Add New” field is “Add new opportunity” then:
       1. The field will be empty
       2. The user will be able to choose the date desired in accordance with the following rules:
          1. IF “No one” is the selected choice for the “Who is Registered for Training?” field, then the following rules apply:
             1. This field is NOT required
             2. This field is disabled since there will be no training associated with this opportunity
          2. IF “Individual” is the selected choice for the “Who is Registered for Training?” field, then the following rules apply:
             1. This field IS required
             2. The user will enter the a value of “1” for “Class Head Count” for the training course since there is only the individual POC that is attending
          3. IF “Group” is the selected choice for the “Who is Registered for Training?” field, then the following rules apply:
             1. This field IS required
             2. The user will enter the “Class Head Count” for the training course
36. This is a drop down selection so the user can identify if this is a new “Company”
    1. This field is NOT required
    2. The drop down menu choices should only be “Yes” or “No”
    3. The field should NOT be a drop-down/combo box since we do NOT want the user to have the ability to adjust any of the selections in the drop down menu
    4. IF the selection in the “Edit Existing or Add New” field is “Edit existing opportunity” and the user has selected a specific opportunity, then:
       1. The field will be populated with the “New Company?” data from the selected opportunity
       2. The user will be able to change the data as desired
    5. IF the selection in the “Edit Existing or Add New” field is “Add new opportunity” then:
       1. The field will be empty
       2. The user will be able to select the appropriate data for this field
37. This is a drop-down / combo box for the identification of the “Industry” type for the Company in this opportunity
    1. This should be a required field since this data is important for reporting purposes
    2. IF the selection in the “Edit Existing or Add New” field is “Edit existing opportunity” and the user has selected a specific opportunity, then:
       1. The field will be populated with the “Industry” data from the selected opportunity
       2. The user will be able to change to one of the other items from the list or add a new item to the list and select that newly added item
    3. IF the selection in the “Edit Existing or Add New” field is “Add new opportunity” then:
       1. The field will be empty
       2. The user will be able to select one of the items from the list or add a new item to the list and select that newly added item
38. This should be a DATE SELECTION field for the user to select the estimated close date of the opportunity, and it should be populated in accordance with the following rules:
    1. This should be a required field since it is critically important for reporting purposes
    2. IF the selection in the “Edit Existing or Add New” field is “Edit existing opportunity” and the user has selected a specific opportunity, then:
       1. The field will be populated with the “Est. Opportunity Close Date” from the selected opportunity
       2. The user will be able to change the date as desired
    3. IF the selection in the “Edit Existing or Add New” field is “Add new opportunity” then:
       1. The field will be empty
       2. The user will be able to select the date as desired
39. This should be a DATE field for the user to enter the “actual close date” of the opportunity and the field should be populated according to the following rules:
    1. This field will ONLY be required and ONLY editable if the “Opportunity Status” field has been set to “Closed Won”
    2. When the user sets the “opportunity status” to the value of “Closed Won”, this field is automatically filled in with the current date – but the field will be editable so that the user can change the date if desired
40. This should be a TEXT field for the user to enter the reason why the opportunity was lost and the field should be populated according to the following rules:
    1. This field will ONLY be required and ONLY editable if the “Opportunity Status” field has been set to “Closed Lost”
41. This is a choice between “Clear” and “Save”
    1. When the user clicks “Clear”, all of the data selected within all of the fields will be erased [except for those fields that have a “default” value established – those fields will revert back to their default values]
    2. When the user clicks “Save”, the user will go to the “Save” popup #1 described in item #43
42. This should be a text field and should be populated according to the following rules:
    1. The field should NOT be required
    2. IF the selection in the “Edit Existing or Add New” field is “Edit existing opportunity” and the user has selected a specific opportunity, then:
       1. The field will be populated with any “historical notes” from the selected opportunity
       2. The user will be able to edit or archive the data within the field as desired by clicking on the appropriate icon
       3. **NOTE:** When the record is being saved and the “notes” field has been updated by the user, then:
          1. The existing “notes” data in the “Tbl\_Opportunities.Notes” field within the database will FIRST be copied to the “Notes” field within the “Tbl\_OpportunitiesHistory.Notes” table
          2. The newly entered “notes” will be written to the “Notes” field within the “Tbl\_Opportunities” table
    3. IF the selection in the “Edit Existing or Add New” field is “Add new opportunity” then:
       1. The field will be empty
43. Once the user gets to this “Save” popup #1, they will be provided with the opportunity to send a meeting invitation based upon the “Next Step” and “Next Contact Date” fields entered within this opportunity record according to the following rules:
    1. If the user selects “Yes”, the record will be saved and the “send email” function will open in a new tab with the following information populated:
       1. User email address [from the “email” field in this record]
       2. Email Subject [from the “Next Step” field in this record]
       3. Date of the meeting [from the “Next Contact Date” field in this record]
    2. If the user selects “Yes”, the original tab will still be open with the existing opportunity record there and the user will be taken to the “Save” popup #2 screen as shown in item #44
    3. If the user selects “No”, the record will be saved and the existing tab will maintain the existing record and the user will be taken to the “Save” popup #2 screen as shown in item #44
44. The user is presented with a final choice to edit another existing opportunity for this company, add another new opportunity for this company, or exit QuickStart according to the following rules:
    1. If the user clicks “Edit” the following will happen:
       1. The user will be taken to the beginning of this “QuickStart – Existing Customer” workflow
       2. The “Edit Existing or Add New” field will automatically be set to “Edit existing opportunity”
       3. The “Company Name” field will be set to the same company name as the company that the user was just working with
       4. The “Opportunity Name” field will be populated with ONLY the available opportunities for the selected “Company”
       5. The cursor will be in the “Opportunity Name” selection field so that the user can make a selection of another existing opportunity for this “Company”
    2. If the user clicks “Add” the following will happen:
       1. The user will be taken to the beginning of this “QuickStart – Existing Customer” workflow
       2. The “Edit Existing or Add New” field will automatically be set to “Add new opportunity”
       3. The “Company Name” field will be set to the same company name as the company that the user was just working with
       4. The “Opportunity Name” field will be blank
       5. The cursor will be in the “Opportunity Name” field so that the user can add a new opportunity name for this “Company”
    3. If the user clicks “Exit” the following will happen:
       1. QuickStart will close and the user will be taken back to the “MY DAY \ My Dashboard” screen