Opportunities Overview and Topics

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The Sales Management module provides a tools for tracking sales leads and the dollars values that have been quoted by using Prospects and Opportunities.

An Opportunity is what the Salesperson is trying to sell to a Prospect. You may create several Opportunity records for each Prospect record and track each one separately until sold or lost. If the salesperson is successful in closing the sale with the Prospect, the Opportunity/Prospect record may be turned into a Customer, Site and Job.

The application also tracks lost business through the resolution of each Opportunity; you have the option of selecting the reason for losing the business and who the competition was for the opportunity.

An Opportunity record is not a detailed quote; it just contains summary amounts of Install Charges and RMR Charges quoted to your Prospect using third-party application.

Note: If the Prospect is not an existing Customer and you have created more than one Opportunity for the Prospect, if the Prospect purchases the system on one of the Opportunities, you are able to convert this into a Customer/Site/Job.
If another Opportunity sale is closed, you will manually close out the Opportunity but not select the option to create a new Customer since the customer already exists. Further, the Job will need to be manually created.

Click on the links below for more information related to Opportunities.

Opportunity Queue Definitions

Creating a New Opportunity

Resolving an Opportunity-Sold

Resolving an Opportunity-Lost