Create a New Opportunity

Once a new Prospect has been saved, the Opportunity form will be available for data entry.
To create a new Opportunity follow the instructions listed below.

1. Once a Prospect record is open, click the Opportunities button from the Prospect toolbar.

2. The Opportunities form will be displayed. Click the New button located at the bottom of the form to begin entering a new Opportunity record.

3. Enter information and/or make selections from drop-down lists according to your company policy and procedures. When finished, click the Save button located at the bottom of the form. The Opportunity saved will be added to the Opportunity List.

Each Opportunity data entry field is described below.

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Opportunity Header Data Entry Fields

- Opportunity Title - This will be defaulted by the application; the word Opportunity followed by the number of this opportunity and the Prospect Name. You may change this to some other text to identify the Opportunity. In a commercial environment this may be a project name.
- Residential or Commercial - Select the appropriate radio button that applies to the Site for the Opportunity.
- Site Name - The application automatically defaults the name of the Prospect; this may be overridden if the Site name is different than the Prospect name.
- Site Address - The application automatically defaults the address entered for the Prospect; this may be overridden if different from the Prospect address.
- Total Items & Total Recurring - These two fields will automatically be populated with the totals for Items and Recurring Items entered into the Sales Items section. These are view only fields.
- System Type - Select the type of System being quoted to the Prospect.
- Status - This field will default to the Status selected on the Prospect form; you may select a different Status for this Opportunity from the drop-down list.
- Source - This field will default to the Source selected on the Prospect form; you may select a different Source for this Opportunity from the drop-down list.
- Quote Type - Select the appropriate Quote Type from the drop-down list; the choices in the drop-down list are controlled by your company within SedonaSetup.
- % to Close - The choices in this drop-down list is controlled by SedonaOffice and is a required field. Select from one of the four values listed. This field defines the likelihood of closing the sale. Choices are 25%, 50%, 75% or 100%.
- Est Close - Enter or select a date from the calendar on which the sale is estimated to be closed.

- Next Follow Up - You may enter a follow up date which will appear in the Opportunity Queue.

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Sales Items Data Entry Fields

- Sales Item - Select the type of Sales Item being quoted from the drop-down list. If a default rate was set for the Sales Item, that amount will default into the Rate field.
- Description - The Description will automatically fill in when a Sales Item is selected. This is a display only field and may not be changed.
- Cycle - If the Sales Item selected was for a recurring service, the default cycle will default for the Sales Item; this may be overridden if needed.
- Qty - The Quantity will default to 1 but may be overridden.
- Rate - This is a display only field. The rate will default from the Sales Item selected. This is a display only field and may not be changed. If the default rate is not correct, type in the correct amount into the Adj Rate field (next field below).
- Adj Rate - If the amount being quoted is different than the amount defaulted into the Rate field, type in the amount in this field.
- Adj Pctg - This field is used to increase or decrease the Rate by a percentage. If the amount in Adj Rate field was changed, this field will display the percentage of increase or decrease of the default rate for the Sales Item.
- Amount - This is a display only field; which is calculating the qty x the rate or adj rate. This field may not be changed.

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Opportunity Function Buttons
At the bottom of the Opportunity form are several function buttons; each of these buttons will be described below.

- Resolve - Depending on whether the sale was closed or lost, this function button is used to either turn the Prospect/Opportunity into a Customer/Site/Job or to close and inactivate the Opportunity and Prospect. This button is only displayed if at least one Opportunity record has been created and saved for the Prospect.
- Save - This button is used to save the information of a new or edited Opportunity.
- New - Clicking this button will clear the Opportunity fields to begin entering information for a new Opportunity.
- Remove - This button is used to Remove (delete permanently) an Opportunity record. If you have not yet saved an Opportunity record to the Prospect, this button will be dimmed out and unavailable for use.

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