Opportunity Queue Definitions

Last Modified on 01/11/2023 3:16 pm EST

The Opportunity Queue is a listing of all Opportunities in process. As Opportunities are sold or lost and inactivated, they drop off the list. Once a Prospect/Opportunity has been inactivated, it still remains in the database. Inactive Opportunities may be viewed by selecting the Show Closed option on the Opportunity List form.

The Opportunity Queue contains columns of information in a grid with basic information related to each Opportunity record and has selectable filters located at the top of the form.

The Filters are used to display a list of Opportunities that meet the filter criteria selected. For example if only the Opportunities created with a particular lead Source are to be viewed, you would make a selection from the Sources filter. Only the Opportunity records with the lead Source selected will be displayed in the grid area.

At the lower right of the Opportunity Queue is a total of Items and RMR; these totals reflect all Items for all Opportunities displayed in the grid.

Each column within the Opportunity Queue and Filter options will be described below.

Opportunity Queue Filters

- Sales Department - Each Salesperson is assigned to one or multiple Sales Departments. When a new Prospect is created, the Sales Department this is a required field. Your company may have one or multiple Sales Departments. You may filter the Opportunity list by selecting a single Sales Department from the drop-down list. The default is All Sales Departments. Your company creates the list of Sales Departments available for selection. Sales Department codes are created and maintained in SedonaSetup.
- Salesperson - Each Prospect is assigned to a Primary Salesperson and an optional 2nd Salesperson. This filter only works with the Primary Salesperson assigned to the Prospect. You may filter the Opportunity list by selecting a single Salesperson from the drop-down list. The default is All Salespeople.
- Status - A Status is a required field on each Opportunity record. The Status is designed to describe where the Opportunity is in the Sales Cycle. You may filter the Opportunity list by selecting a single Status code from the drop-down list. The default is All Statuses. Your company creates the list of Sales Statuses available for selection. Status codes are created and maintained in SedonaSetup.
- Source [Lead] - The Source (Primary) is a required field on each Opportunity record. The Source is designed to describe how the Prospect heard about your company. You may filter the Opportunity list by selecting a single Source code from the drop-down list. The default is All Sources. Your company creates the list of Sources available for selection. Source codes are created and maintained in SedonaSetup.
- Date Range - There are two date field filters provided to search for Opportunity records created within a date range. The first date field is used as the from date and the second date field is used as the to date.

After entering the from and to date range, click the Refresh button on the main application Function Buttons toolbar to refresh the Opportunity List.

Opportunity Queue Grid

You may re-sort the information in the grid by clicking on any of the column headers.

- Title - The titled entered for the Opportunity is displayed in this column.
- Name - The Name entered on the Opportunity record is displayed in this column (Site Name).
- Entered - This column will display the date on which the Opportunity record was created.
- Follow Up - This column displays the current Follow Up date entered on the Opportunity record. If the Follow Up date is prior to today's date, the Opportunity row will be displayed in a red font. If the Follow Up date is today, the row will be displayed in a blue font.
- Status - This column displays the current Status assigned to the Opportunity record. This field is manually updated on the Opportunity record as the sales cycle progresses.
- % to Close - This column displays the current % to Close assigned to the Opportunity. This field is manually updated on the Opportunity record as circumstances change.
- Est Close - The current estimated sale closing date entered on the Opportunity is displayed.
- System Type - The type of System assigned to the Opportunity is displayed.
- Quote Type - The Quote Type assigned to the Opportunity is displayed.
- Item Total - This column displays the total of all non-recurring type Sales Items entered on the Opportunity record.
- RMR Total - This column displays the total of all recurring type Sales Items entered on the Opportunity record. The total amount always displays the monthly amount even if a different billing cycle is selected on the Sales Item line.