Closing an Opportunity and Creating a New Customer and Job

Last Modified on 01/11/2023 3:17 pm EST

Once the salesperson was successful in closing the sale with the Prospect, the Opportunity/Prospect record will be turned into a Customer, Site and Job by "Resolving" the Opportunity.

Follow the instructions below to Resolve an Opportunity and create the Customer/Site and Job.

1. Navigate to the Sales Management/Prospect menu option from the Main Application menu.

2. Open the Prospect record containing the Opportunity that will be resolved.

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

4. Highlight the Opportunity to be resolved in the upper section of the Opportunity form.

5. Click the Resolve button located at the lower left of the Opportunity form.

6. The Opportunity Resolution form will be displayed.

Opportunity Resolution Data Entry Fields

- Resolution - Select the Resolution code from the drop-down list.
- Resolution Date - The Resolution Date will default to today's date; this field is used to record the date the sale was closed. You may override the defaulted date if necessary.
- Competition - If the salesperson was competing against another company for the business, select the Competition code from the drop-down list. If there was no competition or the competitor is unknown, your company should setup codes for these purposes to be available for selection.
- Close Opportunity - select this option. This will inactivate the Opportunity so that is will no longer appear in the Opportunity Queue.
- Inactivate Prospect - If there are no other Opportunities to be resolved for this Prospect, select this option.
- Create Customer - If this Opportunity is for a new customer that does not already exist in SedonaOffice, check this box. If the Opportunity is for an existing customer, do not select this option. At this point you will press the Save button. If the Opportunity is for a new Site and or System installation, open the existing Customer record, add a new Site & System then create the Job. If this Opportunity is for a new customer, check this box.
- Create Job - select this option if a new Job will be created to install equipment or a Job will be created for activating recurring services.

Once all options have been selected, Click the Save button.

7. The New Customer Setup form will be displayed. Many of the data entry fields will be automatically be filled in with information from the Prospect and Opportunity record. Fill in additional information on the Customer Information form according to your company's policies and procedures, then advance to the Site Information form and fill out the necessary information.

If your company is using Customer Custom fields, navigate to the last tab on the right and fill in your company required information.
When finished with the Customer and Site setup information [and Custom Fields if applicable], click the Save button. You will be presented with a confirmation message asking if you are ready to save the new customer; click the Yes button to proceed.

8. Once the Customer & Site information has been saved, the New Job form will be displayed with the Work Order data entry form.
You must make selections for the required fields on the Work Order form. Required fields are: Job Type, Install Company, Salesperson and Sold Date. When finished entering data, click the Apply button to save.

9. The Job System form will be displayed. The only required field on this form is the System Type, which is defaulted in from the Opportunity record. When finished entering data, click the Apply button to save.

Once the Job System form has been saved, the Job toolbar on the left will fill in with additional Job function buttons. The Install Charges and Recurring Charges are automatically brought in from the Opportunity record.

The remainder of data entry is typically done by a staff members from accounting and operations. Refer to the Job Management section of this help for additional information.