# **Opportunities**

## **Overview**

The **Opportunities** feature provides a way to manage sales leads and track the course of each sale's "journey" capturing all the interactions that happen along the way.

Centralized on one screen, each opportunity lets associates work their lead, record progress, generate quotes, and capture key information about the potential sale all while keeping a running timeline of everything they have done thus far. When the sale is completed – win or lose – all data is stored for reporting and analysis.

From a management perspective, managers have the ability to monitor all opportunities from a special list view that provides, at a glance, the status and history of each opportunity, and provides the capability to leave management notes as well as setting next steps.

## Setup

## Permissions

All associates can start and manage their own opportunities with no permissions required.

The following associate permissions have been added:

Manage Opportunities	<ul> <li>Management level permission that:</li> <li>Grants access to all opportunities</li> <li>Allows you to leave management notes and set Next Steps on opportunities.</li> <li>Grants access to Opportunity Management List View (Clientele &gt; Opportunity &gt; Manage)</li> </ul>
Modify Opportunities not assigned to you	Allows you to open and modify opportunities started by other associates
Modify Opportunity Settings	Grants access to Opportunity Settings (Administrative > Advanced Settings > Opportunities)
Run Opportunity Breakdown Report	Allows you to run the Opportunity Breakdown Report (Reports > Management > Opportunities > Oppo Breakdown)
Run the Opportunities Report	Allows you to run the Opportunity Overview Report (Reports > Management > Opportunities > Oppo Overview)

## **System Options**

The following system options have been added:

Days Before StaleOpportunities with no activity for this number of days are considered stale. The<br/>default value is 10.

Require Why In onWhether Why In is required when entering an opportunity; choose between Always,OpportunitiesNever, or only for New Customers.

#### **Customizing Opportunity Settings**

**Opportunities** can be fully customized to fit your store's sales workflow. Default values are provided but can be changed for **Titles**, **Stages**, **Next Steps**, **Results**, **Events**, **Priorities**, and **Contact Methods**.

To access **Opportunity** settings:

 Click Administrative > Advanced Settings > Opportunities > Opportunity Settings. The Opportunity Settings form will appear.

	Opportunity Settings
Title	Opportunity Titles
Stages	Modify the selected list below.
Next Steps	Birthday Gift Add Edit Delete
Results	Anniversary Gift
Events	Engagement Ring
Priorities	Wedding Bands
Contact Methods	Holiday Gift
	Gift
	Close Cancel

**Titles** Name of the opportunity, for example Birthday Gift, Anniversary Gift, Gift.

Stages	Steps an opportunity can go through. You can assign percentages to stages so that you can monitor how far along each opportunity is towards completion.
Next Steps	The next action that should happen for this opportunity. These can be set by both associates and managers.
Results	When an opportunity is closed a result must be selected. Conditions can be placed on each result to require things like linking to a sale when the opportunity is a successful sale.
Events	The type of event for this opportunity, for example Birthday, Anniversary, Wedding. Events can be set to automatically pull in occasion dates from the customer record.
Priorities	What is most important to the customer for this sale? For example, are they set on a specific price point or are they concerned about getting the gift by a certain date?
Contact Methods	The type of contact methods that can be logged on an opportunity such as phone, email, and mail.

2. Use the menu on the left to choose which element of **Opportunities** you wish to modify, then use the **Add**. **Edit**. and **Delete** buttons to make your changes.

	Opportunity Settings										
Title		Opportunity Titles									
Stages		Modify the selected list below.									
Next Steps	Birthday Gift	Add Edit Delete									
Results	Anniversary Gift										
Events	Engagement Ring										
Priorities	Wedding Bands										
Contact Methods	Holiday Gift	Use this title for generating opportunities from wishlists.									
	Gift										
•											

3. There are additional options specific to these sections:

Titles	<ul> <li>Use this title for generating opportunities from wish lists</li> <li>Makes this title the default used when creating opportunities from wish lists.</li> </ul>
Stages	<ul> <li>Percent to Closed         Advancing to this stage will increase the percentage to close by this amount.     </li> <li>Stage Property         Can be used to set the default stage for new opportunities or to make reaching this stage close the opportunity.     </li> </ul>
Results	<ul> <li>Result starts a new opportunity. This result will automatically create a new linked opportunity.</li> <li>Result requires notes. This result requires notes before the opportunity can be closed.</li> <li>Requires a Sale ID. This result requires a link to a sale before the opportunity can be closed.</li> <li>Require an Item ID. This result requires a link to an item before the opportunity can be closed.</li> <li>Remaining Items to Wishlist This result will take any items on the opportunity that were not purchased and place them on the customer's wish list.</li> <li>Considered a positive result. For reporting purposes, this result is a positive result, i.e., the sale was made.</li> <li>When closing the Opportunity change the stage to this: This result will update the opportunity's stage to this when it is closed.</li> </ul>
Events	<ul> <li>Date Set a specific Event Date when this Event is selected, e.g., 2/14 for Valentine's Day.</li> <li>Use Customer's Anniversary Date If available, use the Anniversary Date from their customer record.</li> <li>Use Customer's Birthday If available, use the customer's birthday from their customer record.</li> </ul>

#### ✓ Use Spouse's Birthday

If available, use the customer's spouse's birthday from their customer record.

4. After making desired changes, click **Close**.

## **Opportunities**

Opportunities can be accessed from the following places:

> Clientele Menu

The Edge® File Administrative Wire	dow Help		
EDCE	POS	Customer	Clientele
EDGE			•
Opportunity			
Find			
Add			
Manage			

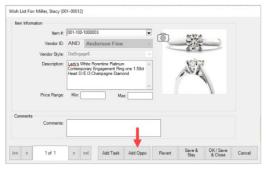
Point of Sale

Associate	~	Share				
Customer						-1
			Find Cust	Notes / Edit	Contacts	Орро
			New Cust	Wish List	Appts	Quotes
			No Name	Ship		

#### Customer Record

General	Primary	Spouse/Partner		Show O M	y Contact	t Methods	All Contac	t Method
ID #	001-00011	001-00012		Method	Туре	e Whi	0	Contac
Gender	~		~	0				
Title				C	Cell	Joseph	(203) 500	-6005
First	Joseph	Stacy			Home	Joseph	JMiller@a	iol.com
Middle		Mier			Home	Joseph	13 Main S Naunatur	R k. CT 06770
Suffix	naser	Inster.	-1	(a)	Home	Stacy	13 Main S	
License #							(wanglauro	e er oarre
Company								
Birthday	5/20/1970	8/15/1972						
Couple			~					
Anniv	Jun 10	Company Account						
Dt Entered	8/12/2022			+ Adar	ess +	+ Phone	+ Email	
	ferchandise Associate							
Last	Transaction Associate			Opportunit	es	Quotes	Clier	t Profile

#### > Wish Lists



## **Creating a New Opportunity**

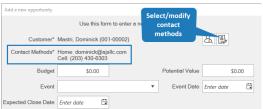
As noted, there are multiple places **Opportunities** can be accessed in the software. For instructional purposes, we will add one from the main Edge menu.

#### To start a new **Opportunity:**

- 1. Click **Cliente > Opportunity > Add**. The **Add a new opportunity** screen will appear.
- 2. Use the buttons in the top right to either find an existing customer or add a new one.

Add a new opportunity				Find
	Use this form	n to enter a new opp	ortunity.	existing
Customer*				<u>&amp;</u> &
Contact Methods*				
Budget	\$0.00		Potential Value	Add new <sub>10</sub>
Event		•	Event Date	Enter date 🛱
Expected Close Date	Enter date			

3. After identifying the customer, the default preferred Contact Methods will appear. The button in the top right will change to Customer Contacts - use this to select and edit how this customer should be contacted for this opportunity.



4. Next, specify the **Opportunity** details:

**Budget** The amount the customer wants to spend.

Potential Value	The potential value of this sale; it will automatically default to the <b>Budget</b> but can be increased to indicate the potential for an up-sale.						
Event	What event is this sale for? For example, a birthday.						
Event Date	What date is the event? Note that the customer's birthday, spouse's birthday, and anniversary dates can be automatically filled in from the customer's record.						
Expected Close Date	When do you anticipate closing this sale?						
Associates	Which associate or associates will be working this opportunity?						
Title	The title for this opportunity. For example, a Gift.						
Description	Details on this opportunity.						
Stage	What stage is this opportunity starting at? The default value is set via <b>Opportunity Settings</b> .						
Priority	What aspect of this potential sale is most important to the customer? For example, do they need it by a specific date? Are they looking to stay within a specific budget?						
Why In	What brought the customer in today? This shares the same Why-In list found at POS. There is a system option that controls whether this is required.						
26 July 2022	TIP-2022-172 5						

**Categories** What categories might the customer be interested in seeing items from? Categories can be selected via the drop-down or by typing in the category number.

5. After competing the form, click **Save/Close**.

Add a new opportunity	
	Use this form to enter a new opportunity.
Customer*	Mastri, Dominick (001-00002)
Contact Methods*	Hame: dominick@ejsIIc.com Cell: (203) 430-6000
Budget	\$1,000.00 Potential Value \$1,500.00
Event	Birthday   Event Date 9/15/2022
Expected Close Date	8/31/2022
Associates*	(P) Jimmy Sales (1)
Title*	Birthday Gift 🔹
Description*	Looking for a birthday present for his friend's 40th. Likes watches.
Støge*	New Opportunity
Priority	Delivery Date 🔻
Why In	Referral
Categories	500 - Watches - Luxury × 510 - Watch - Sport ×
	515 - Watch - Chronograph × Type category here
	Save / Close Cancel

6. The **Opportunity** will automatically open. See the next section for information on working with it.

## Working the Opportunity

Newly added opportunities will immediately open. Existing opportunities can be found via the main Edge menu, the Edge customer record, or from POS. See the **Finding an Opportunity** section for more details.

Customer: N	lastri. Dominick (001-00002)				•		Entered: 1	0/10/2022	Associate:	(P) Jimmy Se	les	
Title: Gift					A		Modified: 1	0/10/2022	Value:	\$2,000.00	Closing %: 0	
	Customer	Information	8			Opportunity Tim	eline			F	itter All	•
	Dominick Mastri	Spouse:		Ø	Opportunity Created						10/10/2022 9:43	3 AM US
	Apr 16 (188 Days)			Ľ	Opportunity created on 10/10/2022 by #1: Jimmy							
Anniversary: # Sales:	may 03 (203 Days)	Tendered: \$30.657.59		_								
w Solies.	20	Tendenda. 200,007.00	_									
	Opportun	nity Details										
Description:	Graduation gift for nephew - likes watches		Ø									
Contact Methods:	Home: dominick@ajslic.com Cell: (203) 500-6000											
Due Date:	10/20/2022											
	Graduation: 11/1/2022											
	\$1,000.00											
Why In:												
	(500)Watches - Luxury, (505)Watches - Dri	655										
	Delivery Date											
Stage:	New Opportunity											
Next Step:	•											
	10/10/2022											
Modified:	10/10/2022											
				G	) 🗄 🛃 🖬 🗃 🕼			8			1 n-@	0
				i			3					<u>A</u>
				Mana	ge Close Contact Email Note Ite	em Wish	Spo	Quote	Task	Appl	s as POS	+ Wishlist
											Print	Close

The **Opportunity** screen includes:

A Information at the top includes the customer, title, enter/modified dates, associate, value, and percentage towards close.

**B** In the top left the customer's name, spouse information, occasion dates, and sales summary displays. You can use the button here to open the customer record.

On the left, the details from the Opportunity display. You can use the button here to open the Opportunity Edit screen allowing you to change the intake details.

С

Additionally, you can use the **Stage** drop-down to change the current stage and you can use the **Next Step** drop-down to indicate what should be done next.

**D** All opportunity events appear in this timeline in chronological order. This is the entire running history of everything that has occurred. You can use the drop-down in the top right to **Filter** what is displayed.

**E** These buttons are all the events that can be added to an opportunity.

To add an opportunity event, click on its corresponding button. Added events will show in the timeline.

Available events include:

(i) Manage	Only visible if you have the 'Manage opportunities' permission. Use this to add manager's notes and/or set next steps.
Close	Close the opportunity. Note that it is also possible to set up a stage so that when it is reached the opportunity will close.
Note	Add a note. These notes will also appear on the Notes tab of the customer record.
(Ô) Item	Add an item.
Wish	Add an existing wish list item. To create a new wish, use the <b>+Wishlist</b> button instead.
Spo	Link an existing special order.
Task	Add an associate task.
Appt	Create an appointment.
Email	Send an email. This requires you have your email settings configured.
Contact	Log the details of a customer interaction, such as a phone call or email.



Add selected item or quote to POS. To use, first click on the item or quote in the Opportunity Events window, then click this button.



Create a quote. Any items already added as events will automatically be pulled into the quote but can be removed. It is also possible to add additional items from the quote screen.



Create a new wish list item. You can either select an item in the event's timeline to turn it into a wish or, if you do not select anything, you can create a brand new wish for any stock or non-stock item.

As you add events, you will see them appear in the timeline. Here's an example where an item was added for the customer to view, the customer was then called, and an appointment was made to come into the store.

#### Note: Events are always in descending chronological order, meaning the last action is always on the top.

	Opportunity Events	Filter All
Opportunity Stage Upda	ted	8/15/2022 2:31 PM JS
Stage changed from: Comm	unicating to: Negotiating	
Appointment: dominick@	ajsllc.com	8/15/2022 2:30 PM <b>JS</b>
Birthday Gift		View Appointment
Wants to schedule appoi	ntment	8/15/2022 2:30 PM <b>JS</b>
customer called while Jimmy	was on break, wants to set appointment to come see watch	View Note
Opportunity Stage Upda	ted	8/15/2022 2:29 PM <b>JS</b>
Stage changed from: New C	/pportunity to: Communicating	
Phone call to: (203) 430-	6000	8/15/2022 2:29 PM <b>JS</b>
spoke with customer, let hin	know we have a watch he may be interested in, emailed him a quote	View Call Log
Customer Quote Generate	ed	8/15/2022 2:29 PM <b>JS</b>
A quote for 1 item(s) was gen	erated on: 8/15/2022 for \$1,650.00. The quote expires on: 8/31/2022	View Quote
🖞 🚦 Item Added to	) Opportunity	8/15/2022 2:24 PM JS
Yellow 18 Kara	t Dress Watch	View Item
Opportunity Created		8/15/2022 12:07 PM <b>JS</b>
Opportunity created on 8/15	/2022 by #1: Jimmy	

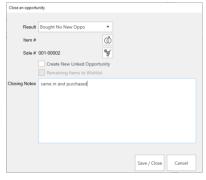
## **Closing the Opportunity**

The final step to working the opportunity is closing it. This should occur whether the sale was successful or not.

This can be done either by advancing to a **Stage** that has been set to close the opportunity or by clicking **Close** in the opportunity events buttons at the bottom.

In this example, the opportunity resulted in a sale. To close this opportunity and record that information:

- 1. From the Opportunity screen, click the Stage drop-down and select 'Sale Won'
- 2. The **Close an opportunity** window will appear. Use the **Result** drop-down to select what happened, in this case 'Bought No New Oppo', and then click the **Sale #** button to select the sale it was purchased on.



3. Click Save / Close to complete closing this opportunity.

## **Finding Opportunities**

To search for an opportunity:

1.	Click Clientele > Opportunit	y > Find.	The Find Opportunities	window will appear.
----	------------------------------	-----------	------------------------	---------------------

Opportunity Find				
	Find	Opportunities		
Start Date			•	
Close Date			•	
Last Activity Date			•	
Stage			•	•
Result				•
Categories			•	·
Priorty				·
Associates				• •
Customer				•
Event				·
Title			•	•
	All Opportunities	Only Closed	Open	
Presets			Find	Cancel

- 2. Enter criteria, or leave blank for all, and click **Find**. Note that you can use the radio options at the bottom to return **All Opportunities**, only **Closed**, and **only Open**.
- 3. Double click to **Edit** the opportunity you wish to open.

Opportunities can also be brought up from POS or directly from the customer record:

ick Mastri					
ony St		Find Cust	Notes / Edit	Contacts	Oppo (6
ur, CT 0648 30-6000	3	New Cust	Wish List	Appts (1)	Quotes (2)
ck@ajsllc.c		No Name	Shin		
	ur, CT 0648 30-6000	ur, CT 06483 30-6000 ck@ajsllc.com	ur, CT 06483 New 30-6000 Cust ck@ajsllc.com No.Name	ur, CT 06483 New Cust Wish List 30-6000 Ck@ajsllc.com No Name Shin	ur, CT 06483 30-6000 ck@ajsllc.com No Name Ship

Inactive	Primary	Spouse/Partner				
ID #	001-00002		Method	Type	Who	
Gender	Ý	~	~			-
Tide			Ø	Cell	Dominick	(20
First	Dominick			Home	Dominick	do
Middle			×	WebSale	Dominick	do
Last	Mastri			Webbale	Commick	
Suffix			۲	Home	Dominick	70 Se
License #			ŵ	Home_1	Dominick	1 M She
Company				Contraction of the local distance of the loc	D OT MINUT	Sh
Birthday	1/1/1980					
Couple						
Anniv		Company Account				
Dt Entered	10/20/2020		+ Acdr	ess + F	hone +	F En
Last	Merchandise Associate Jimmy	Sales				
Last	Transaction Associate Jimmy	Sales	Opportunities	(6)	Quotes (2)	

## **Managing Opportunities**

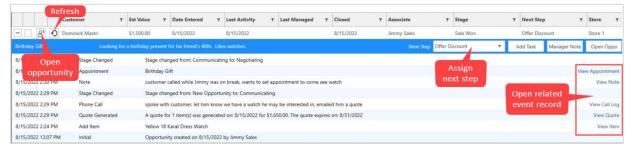
The **Manage Opportunities List View** gives an overview of all opportunities matching your search criteria. At a glance, you know each opportunity's vital data, including the value, entered date, last activity, and current stage. Additionally, you can expand each opportunity to see an overview of its event timeline.

#### To manage **Opportunities**:

- 1. Click **Clientele > Opportunity > Manage**. The **Opportunity Find** window will appear.
- 2. Enter criteria, or leave blank for all, and click Find.
- 3. Each **Opportunity** will show on its own line. Use the + sign to expand an opportunity to view its events.

		Customer	Ŧ	Est Value	Ŧ	Date Entered	Ŧ	Last Activity	T	Last Managed	r	Closed T	Associate	Ŧ	Stage	Ŧ
G	<b>₽</b> <sup>\$</sup> €	Dominick Mastri		\$1,500.00		8/15/2022		8/15/2022				8/15/2022	Jimmy Sales		Sale Won	

4. The expanded view will show each event. There are actionable items here, including the ability to open the opportunity, refresh it, assign a next step, add a task, add a manager's note, and open records related to individual events, such as appointments.



#### Reports

There are two **Opportunity** reports:

## **Opportunity Breakdown**

Provides a detailed breakdown of each opportunity and all its timeline events. It prints 1 card per opportunity.

Title: Birthday Gif	it	Closing %: 100%	Associate: Jimmy Sales
Description: birthday gift			Value: \$2,000
Event: Birthday (10/30/	(2022)		Entered: 10/6/2022
Stage: Sale Won			Due Date: 10/20/2022
Next Step:			Modified: 10/6/2022
Categories: (100) Diamond	Engagement Rings		
Customer: Dominick	Mastri (001-00002)	Budget: 500.00	
Contact Methods: Phone: 20	35006000 (Cell)		
Email: dor	minick@ajsllc.com		
Phone: 20	35006000 (Cell)		
	astri@gmail.com		
10/6/2022	Opportunity Stage Updated	Value changed from: Pr	roposal to: Negotiating
10/6/2022	Opportunity Stage Updated	Value changed from: C	ommunicating to: Proposal
10/6/2022	Opportunity Stage Updated	Value changed from: N	ew Opportunity to: Communicating
10/6/2022	Appointment: (203) 500-6000	Birthday Gift	
View Appointment	Appointment. (205) 500-0000	Diraiday Gin	
10/6/2022	Phone call to: 2035006000	talked to dom and set a	an apt to come in
10/6/2022	follow up call with dom	follow up call with dom	
View Task			
10/6/2022 View Quote	Customer Quote Generated	A quote for 1 item(s) wa quote expires on: 10/31	as generated on: 10/6/2022 for \$1,750.00. The 1/2022
view Quote			

#### **Opportunity Overview**

Provides an overview of opportunities with pertinent information and the ability to group by associate, result,

opportunity type, and more.

Associate	Customer	Entered	Modified	Value	Last T	T's	<u>C %</u>	Stage		Next Step		Close D	ate	Result
Associate: Jimmy	/ Sales													
Result Type: Po	sitive													
Jimmy Sales	Dominick Mastri	8/24/2022	8/24/2022	\$500		0	100%	Sale Won				8/24/202	2	Bought No New Oppo
Jimmy Sales	Dominick Mastri	9/7/2022	9/7/2022	\$500		0	100%	Sale Won				9/7/2022		Bought No New Oppo
Jimmy Sales	Dominick Mastri	10/6/2022	10/6/2022	\$2,000	10/6/2022	2	100%	Sale Won				10/6/202	2	Bought No New Oppo
Jimmy Sales	Dominick Mastri	10/6/2022	10/6/2022	\$2,000	10/6/2022	1	100%	Sale Won				10/6/202	2	Bought No New Oppo
	Resul	It Type: Positi	ve	\$5,000		0	100%	Count: 4						
	Result Type:	Positive Ration	os Closed:	4	100%	\$5,000	L	.ost: 0	0%	\$0	Open:	0 0	%	\$0
Result Type: Ne	gative													
Jimmy Sales	Dominick Mastri	8/24/2022	8/24/2022	\$500	8/24/2022	1	0%	Communica	ting	Offer Discount		8/24/202	2	Stopped Communicating
	Result	Type: Negati	ve	\$500		1	0%	Count: 1						
	Result Type:	Negative Ration	os Closed:	0	0%	\$0	L	.ost: 1	100%	\$500	Open:	0 0	%	\$0
Result Type: Op	ien													
Jimmy Sales	james madison	9/14/2022	9/14/2022	\$500		0	0%	New Oppor	lunity					
Jimmy Sales	Ray Phelan	9/19/2022	9/20/2022	\$1,500		0	50%	Proposal		Follow up with Manager				
Jimmy Sales	Dominick Mastri	9/27/2022	9/27/2022	\$750		0	0%	New Oppor	lunity					
Jimmy Sales	Dominick Mastri	9/27/2022	9/27/2022	\$250		0	0%	New Oppor	tunity					
Jimmy Sales	Katie Obrien	9/30/2022	9/30/2022	\$777	9/30/2022	3	0%	New Oppor	tunity					
Jimmy Sales	Lauren Taylor	9/30/2022	10/6/2022	\$453	9/30/2022	6	0%	New Oppor	tunity					
Jimmy Sales	Dominick Mastri	10/10/202	10/10/202	\$2,000		0	0%	New Oppor	unity					

## **Opportunity Breakdown**

To run the **Opportunity Breakdown** report:

- 1. Click Reports > Management > Opportunities > Oppo Breakdown.
- 2. Enter desired criteria and click Find.
- 3. This report is designed to be printed and can be used by the associate working the lead.

#### **Opportunity Overview**

To run the **Opportunity Overview** report:

- 1. Click Reports > Management > Opportunities > Oppo Overview.
- 2. Enter desired criteria and click Find.
- 3. This report provides a snapshot of each opportunity. Make use of the **Grouping** options to see the report organized by associate, result, why-in, event, and more.

## Dashboards

Dashboards can be added to display Opportunity data.

# Opportunities Cri	eated	\$ Opportunity P	Potential	Opportunities	Created			
				Customer	Associate	Created Date	Budget	
	~		4 700	Masth, Dominick (I	01-00002) Jimmy Bales	8/24/2022 10:46:14 AM		500.00
1	3	1 \$1'	1,780	Mastri, Dominick (2	01-00002) Jimmy Sales	8/24/2022 10:46:14 AM		500.00
	0	Ψ	1,700	Masth, Dominick (2	01-00002) Jimmy Bales	8/24/2022 10:46:14 AM		505.00
				Masth, Dominick (I	01-00002) Jimmy Sales	8/24/2022 10:46:14 AM		500.00
Opportunities Clo	osed	\$ Opportunities	Closed	Mashi, Dominick (2	01-00002) Jarreny Sales	8/24/2022 10:46:14 AM		505.00
- opportunities on		+ opportunities	0.0000	Mastri, Dominick (S	01-00002) Jimmy Sales	8/24/2022 10:46:14 AM		500.00
		1 <u>+</u> -		Masth, Dominick (2	01-00002) Jimmy Sales	8/24/2022 10:46:14 AM		500.00
	Current: 5	L \$5	,500	Mastri, Dominick (I	01-00002) Jimmy Sales	8/24/2022 10:46:14 AM		500.00
<b>_</b>	Goal: 1		.000	Market Provinces 17	64.000031 Emmi Datar	B/54/90/99 ND AD 44 848		500.00
0 500 %	1		,					View
0 500 %	1		,	Ormaturities	Cash			View
0 500 %	1 ent Activity		·	Opportunities	Stale	Created Date	Bullot	-
	Associate	Last Activity 8042002 10 46:14 AM	Burget 500.00	Customer		Created Date 8/34/2002 10 46 14 AM	Budget	500.00
Customer	Associate 2) Jimmy Sales	LastActivity	Bufgel	Customer Mastil, Dominick (5	Associate		Budget	
Customer Mastri, Dominick (801-0000)	Associate 2) Jimmy Sales 2)	Last Activity BQ4/2002 10.46:14 AM	Budget 500.00	Customer Masth, Dominick (5 Masth, Dominick (5	Associate 01-00022) Jimmy Sales	8/24/2022 10:46:14 AM	Budget	508.00
Customer Massi, Dominick (501-0000) Massi, Dominick (501-0000)	Associate 2) Jimmy Sales 2) Jimmy Sales	Last Activity BQ42002 10 46 14 AM BQ42002 3 32:00 PM	Burget 000 00 500 00	Customer Masth, Dominick (5 Masth, Dominick (5 Masth, Dominick (5	Associate 01-00022) Jimmy Sales 01-00022) Jimmy Sales	8/24/2022 10:46:14 AM	Bulget	506.00
Custover Mes91, Dominick (501-0000) Mes91, Dominick (501-0000) Mes91, Dominick (501-0000)	Associate 2) Jimmy Sales 2) 2) Jimmy Sales 2) Jimmy Sales	Last Activity 8042002 10 46 14 Add 8042002 3 32:50 PM 8042002 10 47 35 Add	Buriget 500.00 1500.00 550.00	Customer Masti, Dominick (7 Masti, Dominick (7 Masti, Dominick (7 Masti, Dominick (7	Associate 01-00022) Jimmy Sales 01-00022) Jimmy Sales 01-00022) Jimmy Sales	8/24/2022 10 46:14 AM 8/24/2022 10 46:14 AM 8/24/2022 10 46:14 AM	Burget	508.00 508.00 508.00
Custemer Massi, Dominick (201-00022 Massi, Dominick (201-00022 Massi, Dominick (201-00022 Massi, Dominick (201-00022	Associate 2) Jimmy Sales 2) 2) Jimmy Sales 2) Jimmy Sales	Last Activity 8242002 10 46 14 AM 8242002 3 32/90 PM 8242002 10 47/35 AM 97/2002 2 40:00 PM	Burget 500.00 500.00 500.00 500.00 500.00	Customer Mastr, Dominick (5 Mastr, Dominick (5 Mastr, Dominick (5 Mastr, Dominick (5 Mastr, Dominick (5	Associate 01-00022 Jimmy Sales 01-00022 Jimmy Sales 01-00022 Jimmy Sales	8/24/2022 10 46: 14 AM 8/24/2022 10 46: 14 AM 8/24/2022 10 46: 14 AM 8/24/2022 10 46: 14 AM	Budget	908.00 908.00 908.00 908.00
Customer Massi, Dominick (001-00002 Massi, Dominick (001-00002 Massi, Dominick (001-00002 madison, james (001-00022	Associate Associ	Last Astivity Bi242002 10 86 14 AM Bi242002 10 25 35 20 PM Bi242002 10 47 35 AM Bi72002 2 46 30 PM 91142002 2 59 15 PM	Burget 500.00 500.00 500.00 500.00 500.00 500.00	Costorear Mastit, Dominick (2 Mastit, Dominick (2 Mastit, Dominick (2 Mastit, Dominick (2 Mastit, Dominick (2	Associate Of-00022 Jimmy Sales	8/24/2022 10:46:14 AM 8/24/2022 10:46:14 AM 8/24/2022 10:46:14 AM 8/24/2022 10:46:14 AM 8/24/2022 10:46:14 AM 8/24/2022 10:46:14 AM	Budget	508.00 508.00 508.00 508.00 508.00
Customer Massi, Donmick (001-00002 Massi, Donmick (001-00002 Massi, Donmick (001-00002 Massi, Donmick (001-00002 madsen, james (001-00020) Phatan, Ray (001-00020)	Associate 2) Janney Sales 2) Janney Sales 2) Janney Sales Janney Sales Janney Sales Janney Sales	Last Artivity Bi24/2002 10 46 14 Aar Bi24/2002 10 26 14 Aar Bi24/2002 10 47 35 Aar Bi24/2002 10 47 35 Aar Bi20/2002 2 Alti 30 PM Bi14/2002 2 30 15 PM Bi14/2002 2 30 45 37 PM	80x6get 606.00 506.00 506.00 606.00 606.00 906.00	Custemer     Mass1, Dominick (5	Associate Of-00022 Jammy Sales	80942002 10 46:14 AM 80942002 10 46:14 AM	Budget	506.00 508.00 508.00 508.00 508.00
Manst, Dominick (001-00002 Manst, Dominick (001-00002 Manst, Dominick (001-00002 Manst, Dominick (001-00002 madiscer, james (001-00002) Phetas, Ray (001-00000) Manst, Dominick (001-00002)	Associate 2) Janney Sales 2) Janney Sales 2) Janney Sales Janney Sales Janney Sales Janney Sales	Last Activity R042002 10 46 14 AM R042002 10 47 35 AM R042002 10 47 35 AM R042002 10 47 35 AM R042002 24 80 00 PM D142002 24 80 15 PM S101020 24 80 15 PM S101020 23 46 37 PM	Burget 0.0000 0.0000 0.0000 0.0000 0.0000 0.0000 0.0000 0.0000 0.0000 0.00000 0.0000 0.000000	Customer     Mass1, Dominick (5     Mass1, Dominick (5	Associate           01-0002)         Jimmy Sales           01-0002)         Jimmy Sales	804/2002 10 46 14 AM 804/2002 10 46 14 AM	Burget	508.00 508.00 508.00 508.00 508.00 508.00

#### Available Dashboard tiles includes:

#### <u>Numeric</u>

# Opportunities Created
\$ Opportunities Potential
# Opportunities Closed
\$ Opportunities Closed
# Opportunities Stale
\$ Opportunities Stale

## Gauge

# Opportunities Created
# Opportunities Closed

#### <u>Chart</u>

# Opportunities Created by Associate
\$ Opportunities Potential by Associate
# Opportunities Closed by Associate
\$ Opportunities Closed by Associate
# Opportunities Created by Why In
# Opportunities Created by Category
# Opportunities Created by Title
# Opportunities Created by Event
# Opportunities Closed by Result
# Opportunities Closed by Outcome

#### List View

Opportunities Created Opportunities Stale Opportunities Recent Activity