



WORK INSTRUCTION Project Opportunity



December 2017

Use these instructions to open and manage Project opportunities to close.

RESEARCH / SELLING PHASE



Open NEW

Select Opportunity Record Type Non Pipeline Quotes

Opportunity Edit Opportunity Name | Use Project or Building name
Account Name | Builder – if unknown
Type | Project or Project w/ Installation
Close Date | Date of Project award
Stage | Research or Solution Proposal
Job Site Address | Project location
Description | i.e. Four story residential condo

Select Save



BUILDER UNKNOWN

Open an Account
Account Name | TBD

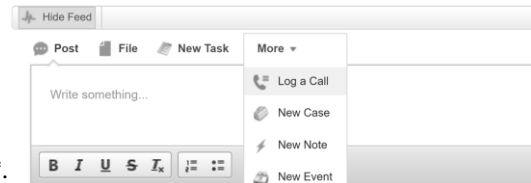
- Follow the same set up steps
- When the GC is known go to **Opportunity Edit** – change the Account name

If the project is in development open the Opportunity under the Architect [Type - Influencer]

MANAGE THE OPPORTUNITY

Use the **Feed**;

- **Post** comments [use @personname if you want to inform that person – i.e. @harrysunner]
- **File*** and **Post** Project Information, LIST price quote per the Project Order **WORKFLOW**
- **Post a New Task**
- **Log a Call*** (F2f and important phone calls) and add a **New Note***.



* Files, Notes and Logged call in the Feed will also be will be filed in Open Activities, Activity History or Notes & Attachments below.

PROJECT AWARDED



Change Non Pipeline Quotes to Single



Awarded the Project;

- Change Stage to **Negotiation Review** – this changes the Forecast Category to **Commit**
- Close Date should be the date the Order(s)* will be uploaded
- Opportunity will change to Closed Won after order is uploaded

* For multiple orders – Open multiple Opportunities with appropriate Close Dates



Not awarded the Project;

- Change Forecast Category to **Closed Lost**
- Select **Close Lost Reason** and provide **Closed Lost Reason details**