



WORK INSTRUCTION Project Opportunity



March 2019

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

RESEARCH / SELLING PHASE



Open NEW

Select Opportunity Record Type Non Forecast 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

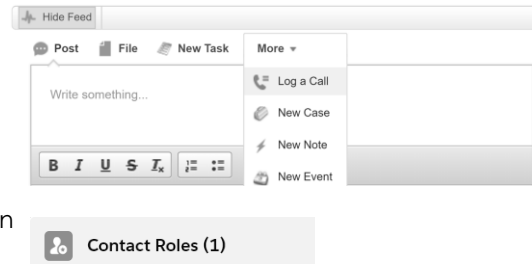
If the project is in development open the Opportunity under the Architect [Type - Influencer]

Add Contact Roles

MANAGE THE OPPORTUNITY

- **Post** comments in the Opportunity [use @personsname 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 phone calls) and add a **New Note***.
- **Add** in Contact Roles (Architect, Engineer, Decision makers etc.)

* 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 Opportunity Record Type from Non Forecast Quotes – to - Single



Awarded the Project;

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