

List of opportunities

Opportunities reflect forecast sales of particular items divided by customers/vendors. Thanks to reporting the chances of sale, they can be analyzed in BI. An example can be an analysis of chances (quantity-based and value-based) in reference to the actually achieved results.

To display opportunity list in the menu available from the level of customer/vendor list, click on the button [**Opportunities**].

The form of a new opportunity contains *General* tab and tabs:

- **Supervisors** – the list is automatically completed with contact persons assigned to a customer/vendor with the possibility of editing them
- **Attributes**
- **Attachments**
- **Change History**

Section *Sales Opportunities* with the following fields:

- **Category** – a drop-down list allowing for selecting and specifying category of a defined opportunity. The field is available in opportunity details. Defining of new opportunity categories is available from the level of *Configuration → Generic Directories → CRM → Opportunity Categories*. Predefined values of the directory: *Promotion Action, Standard Business Activities*.
- **Classification** – value selected from among those defined in the generic directory *Opportunity Classification*. The directory is available from the level of *Configuration → Generic Directories → CRM → Opportunity Classification*. Predefined values of the dictionary: *Cold, Warm, Hot*.
- **Probability** – percentage estimation of the execution of the assumed opportunities
- **Customer/Vendor** – field with code and name of the entity

an object is assigned to (inactive field)

Section *Schedule and Sales* with the following fields:

- **Status** – allows for determining opportunity status for a given customer/vendor. The list of opportunity statuses is available from the level of *Configuration → Generic Directories → CRM → Opportunity Status*. Default values of the generic directory: *New, Lost, Preliminary Negotiation, Advanced Negotiation, Successfully Closed*.
- **Price Type** – field with price type from which an item price will be retrieved for the purpose of price autocalculation
- **Estimated Total Price/Offered Price** – numeric value defined by an operator
- **Autocalculated Price** – currently calculated sum, on the basis of unit prices and item quantities added in *Items*. Price of items is retrieved from the most recent price list created on the basis of selected price type, in reference to specified day and hour of expected date of sale. This value is recalculated automatically when:
 - *Changing quantities of items on the list*
 - *Adding/deleting items to/from the list*
 - *Changing price type*
 - *Changing currency type (according to the current date of the system; if the currency exchange rate has not been provided, the value 0 is displayed)*
- **Recently Calculated Total** – this is an autocalculation of price calculated during the last editing/adding of an opportunity. In addition mode, this value always equals to that of the field *Autocalculated Price*. After saving and reopening the window, presented value is the one with which a given opportunity was recently saved

Section *Items*, where, besides the standard columns identifying a given item, the following fields are available:

- **Unit Price** – retrieved from the price list created on

the basis of a previously selected price type (the date *Effective From* is the most current date from among all the price lists and is, at the same time, earlier than the date *Expected Date of Sale* specified on the form of opportunity)

- **Currency** – retrieved from the price list created on the basis of a previously selected price type
- **Expected Quantity** – numeric value defined by an operator

Note

The values of the panel *Supervisors*, available in *CRM* tab, are copied to the mentioned tab during the addition of an opportunity for a customer/vendor. The values on that list can be changed, but the entered modifications will not affect the list of supervisors on a customer/vendor form.