SuiteTraining™

Customer Logo

Inside Sales Accountant – Job Aid

Tailored **Role-Based** curriculum to reflect your user community processes and tasks.

Create a New Opportunity

Opportunities are potential sales deals that specify the targeted items the customer/potential customer is interested in, or a dollar amount that is not associated with items.

As the negotiations continue, update the probability of close that corresponds to the opportunity's status in the sales cycle.

You recently returned from a trade show and met with the existing custom Dixie View Contracting. They are considering purchasing our MXT Survey Scope Transmitter. Enter the opportunity.

Tailored to reflect your business scenarios.

Steps

1. Locate the customer record and click > New Opportunity from the customer record.
2. Enter a **Title** of the opportunity.
   Note: All opportunities are entered in the following format. Product + Customer Name (e.g. MXT Scope – Dixie View Contracting).
3. Enter or select the **Company** associated with the opportunity.

Tailored **Notes:** to reflect your business rules.

4. Select the **Status** of the opportunity.
   Note: For Forecasting purposes, update all opportunity statuses weekly.
5. Enter the **Projected Win Total** value of the opportunity.
   Note: The **Weighted Total** represents the Projected Total multiplied by the Forecast Probability percent.
6. Review the **Forecast Probability** field.
   Note: This percentage is determined by the Status selected. You may manually edit this if required.
7. Enter the **Expected Close** date to signify the date you expect the deal to close.
8. Enter **Details** describing the opportunity.

Tailored **Fields** that mirror your system.

9. Select the **Forecast Key** and enter the 'worst case' and 'upside' amounts in the **Range To** fields.
10. Navigate to the **Products** subtab.
11. Select the **Product** (e.g MXT Survey Scope Transmitter) and press the **Tab** key.
    Note: Click Add Multiple to add several items at one time. Enter a **Qty** amount for each product and click Done.
12. Enter a **Quantity** amount for the product.
13. Select the **Price Level** that applies to the customer.
14. The total amount is calculated (Quantity * Rate) and appears in the **Amount** field.
15. Edit / validate the remaining **Items** line item fields and click Add.
16. Navigate to the **Relationships** subtab to associate any contacts and competitors.
17. Utilize the **Communication** subtabs > **Events**, **Tasks**, **Phone Calls**, **Files**, and **User Notes**, to add CRM activities.
18. Click Save.

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Create a Sales Order from the Opportunity

A sales order is the commitment to purchase specific goods and/or services. All Inside Sales Orders are generated from the opportunity record.

Dixie View Contracting has agreed to purchase the MXT Survey Scope Transmitter. Generate the Sales Order and email it to the customer to confirm the sale.

Tailored **Exercises** to reflect your configured business process.

Steps

1 Perform a **Global Search** to locate the opportunity record to convert to an order.

2 Click > New Sales Order.

3 When the **Sales Order** record opens, validate and update any information located in the **Primary Information** section.

4 Enter the Billing Schedule **Start Date** (today's date) and **End Date** (+ 90 days from today).

5 Enter "**Inside Sales**" in the **Memo** field.

6 Validate and update any information located in the **Sales Information** section.

7 Enter the **Sales Effective Date**.

Note: This date determines the start of our 90 day Same-as-Cash policy.

8 Navigate to the **Billing** subtab.

9 Click **Billing Period** and select **90 – SMC** from the list.

Tailored **Fields** and **Values** that mirror your application.

10 Select the **Bill To Select** address for the sales order. See note to modify addresses.

11 Navigate to the **Items** subtab.

12 Select the **Promotion Code** that applies to this order.

Note: This is only selected when the customer has supplied a code.

13 Validate each **Product Line Item** displays the correct product information, price level and amounts. Amend, if necessary.

14 Navigate to the **Shipping** subtab.

15 Select the **Ship To Select** address for the sales order.

- Click Edit to modify the existing address.
- Click New to add a new address to the customer record.
- Select - Custom – to add an address (one time only) just for this single sales order.
  The address is not saved or stored on the customer record.

16 Navigate to the **Communication** subtab > **Messages** subtab and select the method to issue the order:

- ☐ **To Be Printed**
- ☐ **To Be E-mailed** (enter email address)
- ☐ **To Be Faxed**

Enter a **Customer Message** or choose a predefined **Select Message**.

Note: Utilize the subtabs > **Events**, **Tasks**, **Phone Calls**, **Files**, and **User Notes**, to add CRM activities.

17 Click Save.

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