# *Portal Prodigy*™

# Sales Management Features in Detail

Chapter Excerpt from Software User & Administration Guide
January 2007 Update
www.portalprodigy.com

## 1.1 Introduction

. Portal prodigy provides one of the most comprehensive web based sales management systems available today. Sales opportunities, related follow up tasks, company database, contact database, support requests, requests for quotes and proposals, orders and purchases and commissions features are all integrated into a seamless system allowing you and your staff, resellers, channel partners and affiliates to manage the entire sales and support process from campaign concept, through prospecting and closing, to payments and commission distribution. Not stopping there, residual sales and services are also automated so that staff is tickled for follow-up, subscriptions renewals automatically billed and lots more.

Why not provide your salespeople with the ability to manage the complete sales process starting with entry of a sales opportunity, tracking the prospecting and sales process, storage of information including attachments, correspondence including email and print, requests for quote (RFQ/RFP), creation of quote, conversion of quote to order, tracking order status, viewing order and product purchase history, and tracking sales commissions?

Sales prospects and market universes are organized in Portable Prodigy as Sales Opportunities and can be organized, managed and reported in many ways including:

- Access filtered and/or secured by sales teams or even specific sales representatives.
- Search and sort by Company or Contact or both.
- Request Type
- Sales stage – For example, new, open, or closed.
- Opportunity Status- For example, Fresh Lead, Contact and Rapport Building, Qualifying and Info Gathering, Awaiting Presentation, Negotiations, On Hold, Requires Closing, Closed.
- Rating – For example, Immediate Need, Planning Stage, Just Shopping, Vague Interest, Not Qualified.
- Target Sales $’s and Target Close Date.

Sales Management Feature benefits include:

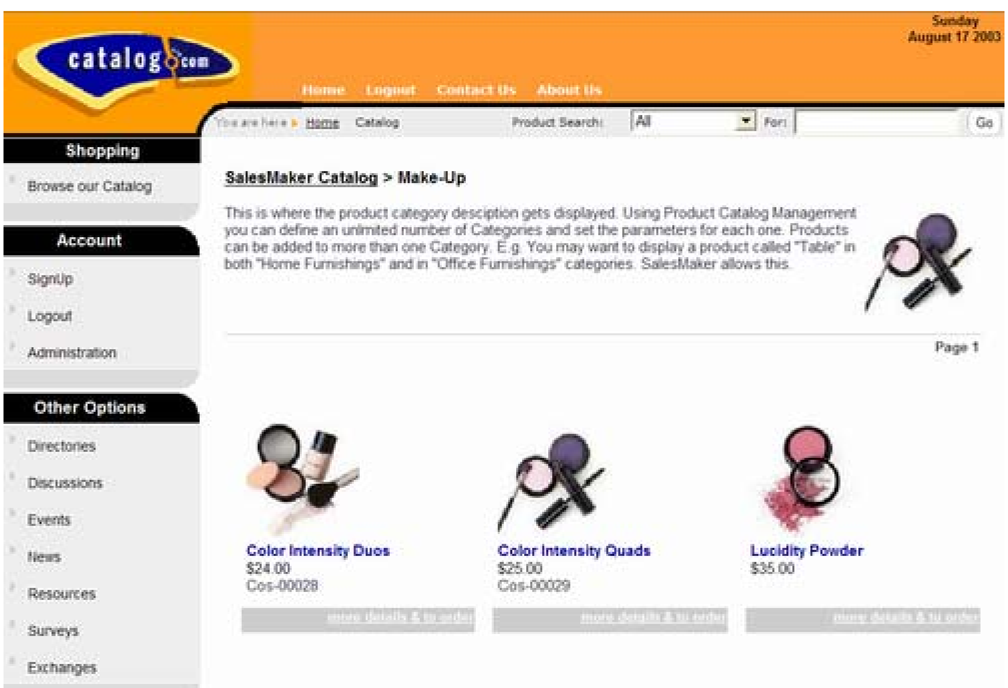
- Instant customization to fit the way your organization sells.
- Helps your organization standardize the sales process.
- Accessible from anywhere in the world.
- Automates much of the sales organizing process.
- Create unlimited request forms to capture leads from website visitors and automatically send a personalized response to prospect and notification to appropriate sales team based on rules that you customize to your operation.
- Load batches of prospects and schedule contacts and reminders.
- Presents management with real-time data on each step of the sales process.
- Prevents loss of sales due to untimely follow up and lost leads.
- Can secure data to specific sales teams and sales representatives.
- Faster notification of teams and representatives of opportunities and tasks.

- Promotes collaboration.
- Provides at-a-glance calendar of tasks.
- Keeps all relevant parties aware of customer related activities.
- Streamlines the support process.
- Provided easy to use tools for cross-team delegation, management and scheduling.
- Quickly access complete historical record of all activities related to a company, contact, opportunity, task, sales team, representatives, requests for quotes, orders, purchases, subscriptions and support.
- Sales representatives can broadcast template based email messages on demand.
- Centralizes complete pipeline management from request, to quote, to order, to fulfillment and payment. All securely accessible from anywhere in the world at your convenience.

The Sales Management feature addresses the data access control that businesses desire. Most businesses want to control their staff's access to contacts, companies, opportunities, commissions, requests, quotes, and orders on a record level. They also want to control who can assign sales reps and sales teams to Contacts and Companies. Plus each sales rep and sales team may want to keep their records private.

## 1.2 The Visitor Experience

Visitors typically enter your sales management system via your online catalog or by submitting an online request.

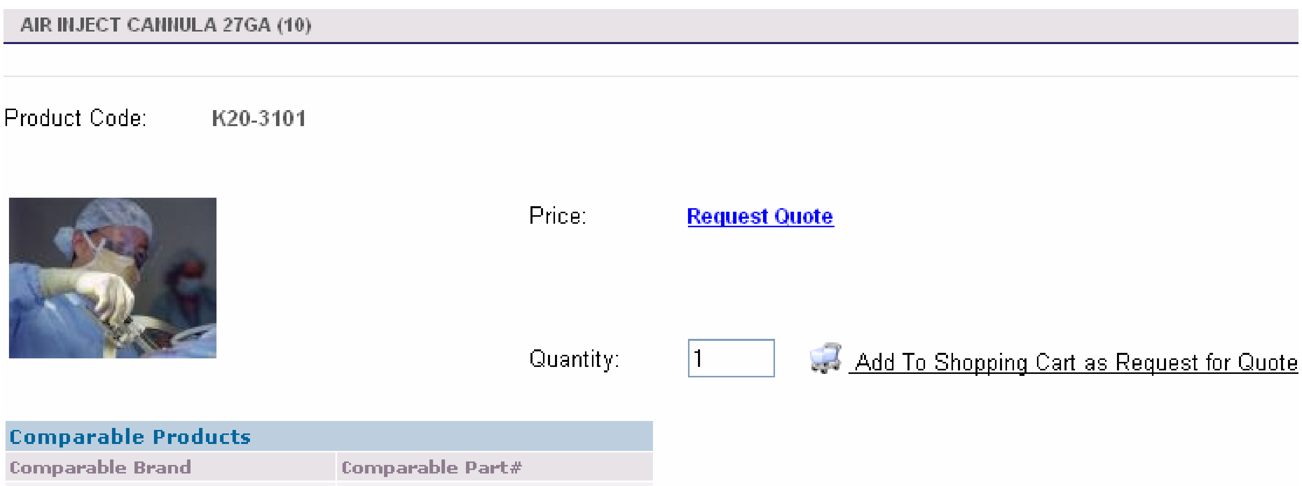


From within the Shopping Catalog the visitor simply clicks on the Product 

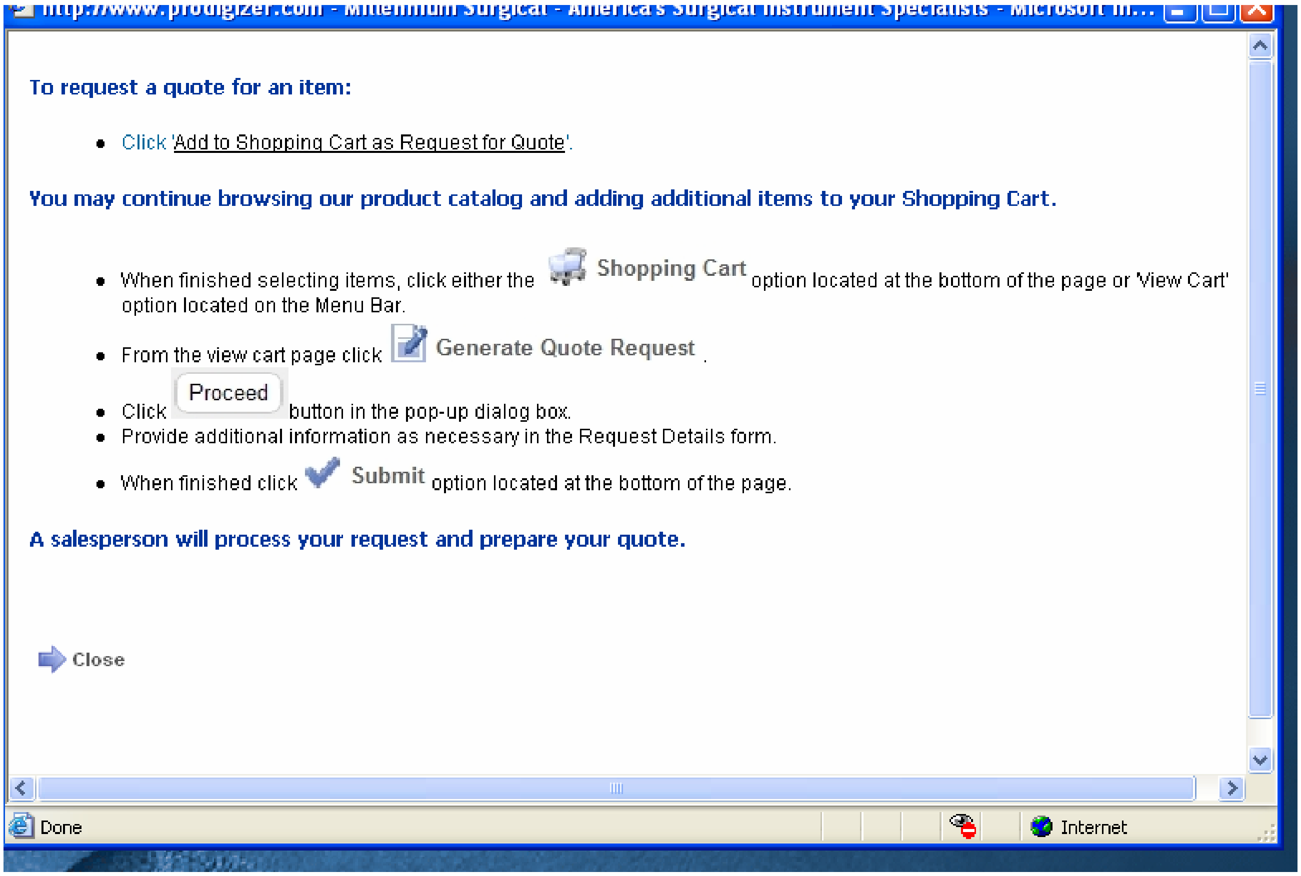
name, the image, or the 

to display the Product Details page. The Product Detail page provides a description of the product along with an image, pricing and purchase options. If applicable the user may select sizes and colors. To purchase an item, the visitor clicks on Add to Shopping Cart. If the visitor is not logged into the site they will be prompted to login or Signup. PORTALPRODIGY provides a Quick Registration form builder so you can customize the registration form. When the visitor is finished shopping, they select Checkout to finalize their purchase.

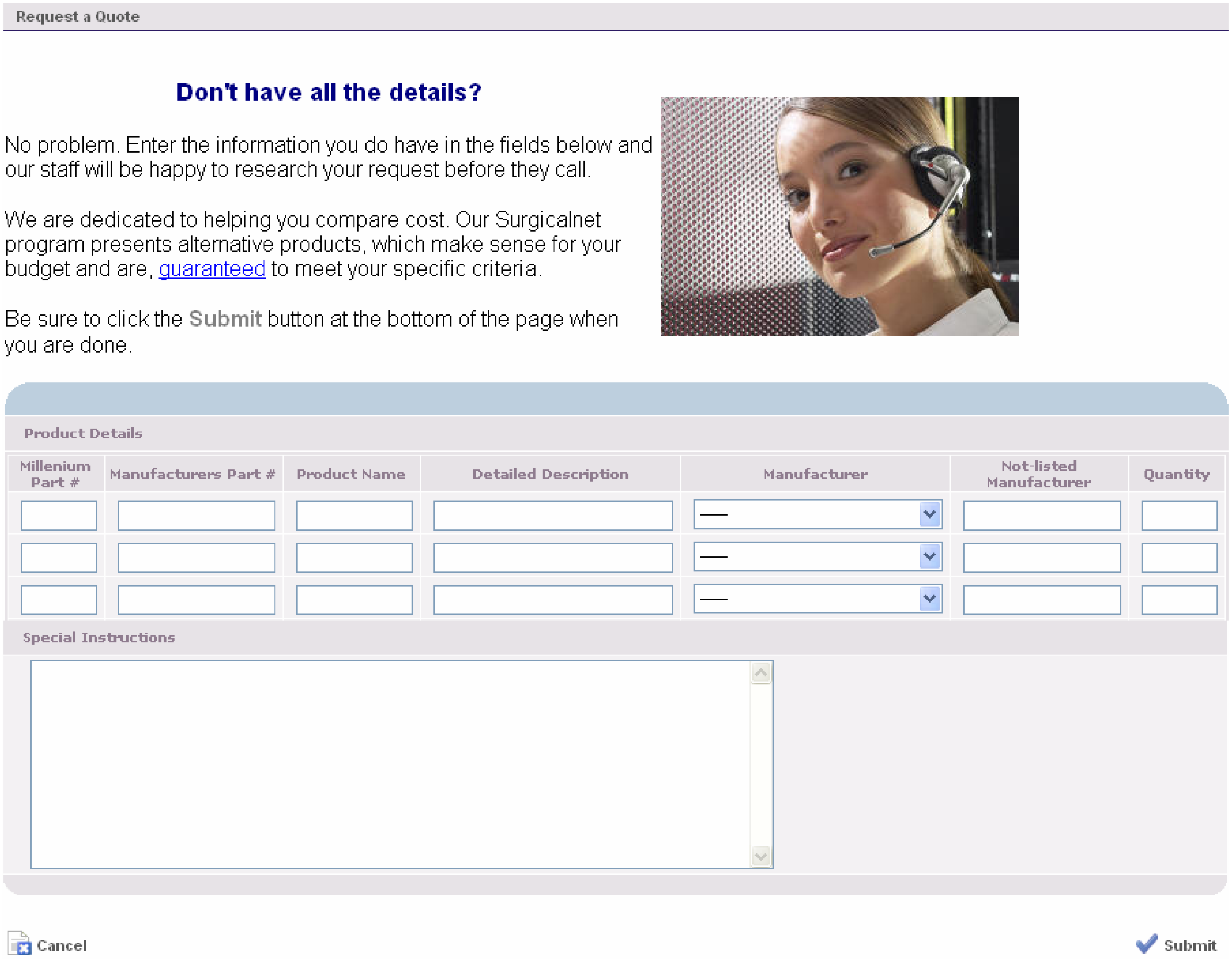
In certain cases, especially complex and customizable products, the website can provide for requesting a quote.




PORTALPRODIGY allows for customized pop-up instruction windows to help customers along.




Create customized Request-for-Quote forms such as the one shown below:



Request a Quote

**Don't have all the details?**

No problem. Enter the information you do have in the fields below and our staff will be happy to research your request before they call.

We are dedicated to helping you compare cost. Our Surgicalnet program presents alternative products, which make sense for your budget and are, guaranteed to meet your specific criteria.

Be sure to click the **Submit** button at the bottom of the page when you are done.

Product Details

| Millenium Part # | Manufacturers Part # | Product Name | Detailed Description | Manufacturer | Not-listed Manufacturer | Quantity |
|---|---|---|---|---|---|---|
| | | | | — | | |
| | | | | — | | |
| | | | | — | | |

Special Instructions

Cancel

Submit

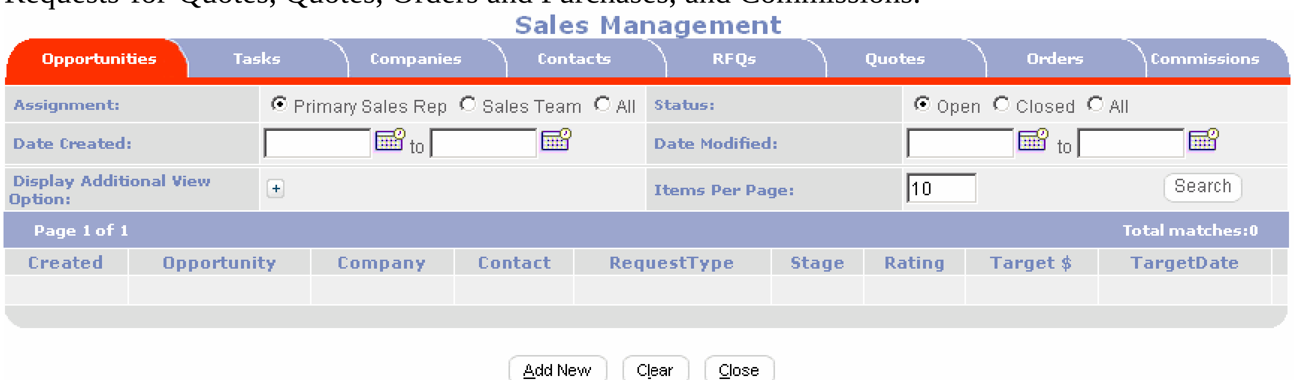
## 1.3 Components

The following components are used to manage the sales process

### 1.3.1 Sales Management page

The sales management page is accessed by clicking the "Sales" Browse button located in the Contact Management menu of the Main Administration Menu (Ctrl-Alt-m).


The Sales Management Page provides access to the different components of the Sales Management System via clickable tabs. Upon clicking a tab, the system refreshes the page to present the corresponding search, add and report interface. From the Sales Management page, one can access the following types of records: Sales Opportunities, Tasks and Assignments, Companies, Contacts, Requests-for-Quotes, Quotes, Orders and Purchases, and Commissions.




The Sales Management feature helps salespeople manage the complete sales process starting with entry of a sales opportunity, tracking the prospecting and sales process, storage of information including attachments, correspondence including email and print, receiving requests for quotes, responding with quotes, converting quotes to orders, tracking order status, viewing order and product purchase history, and tracking sales commissions.

The Sales Management page provides the ability to view and edit data for specific sales opportunities as well as the ability for a salesperson to view all data they are involved with as either a primary sales rep or a member of the assigned sales team.

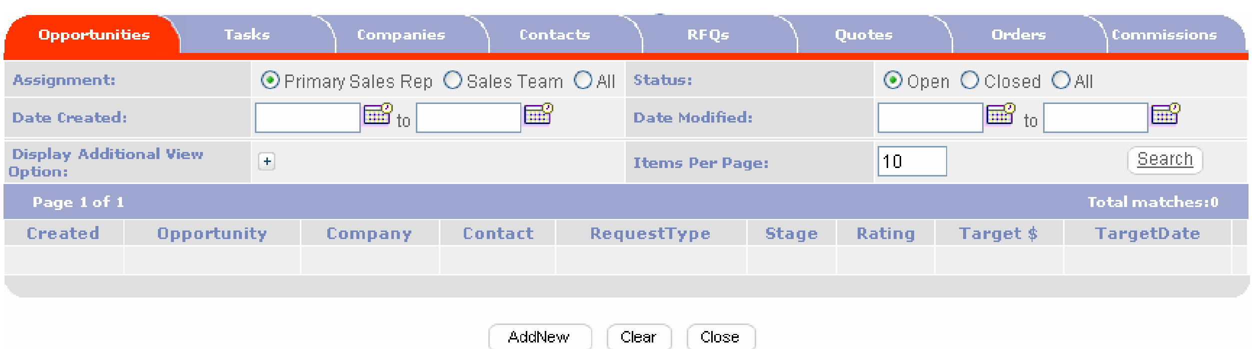
Actions that can be performed from Sales Management include:

1. Select Opportunity
2. View Opportunity Details
3. View Company record

4. View, add and edit Opportunity related Contacts.
5. Assign Tasks to Sales Team & Others
6. View Individual Contact records
7. Add and Edit RFQs
8. Price RFQs and convert to Quotes
9. View Quotes
10. Add and Edit Quotes
11. Convert Quotes to Orders
12. View Orders
13. Add and Edit Orders
14. View Tracking Status
15. View Commissions
16. Send Email to Contacts using Broadcaster templates along with print option
17. View Work Orders
18. Add and Edit Work Orders
19. Print Reports
20. Lookup Products
21. View and edit personal calendar and tasks.

- **Sales Management Page Opportunities Tab –** Displays list of Salesperson's, Sales Team's or Company's Sales Opportunities. Opportunity Records are used to describe sales opportunities such as a new client prospect, a sales lead, a new order for an existing client, offering of a new product line to an existing client, etc. New opportunity records are entered by clicking on the 

button at the bottom of the Opportunities Sales Management Page. Note that Opportunity Records may also be created when operating from the add requests features with the use of Requests.FeatureComponent = "Opportunity".




**Display Additional View Option:** - Clicking on the Opportunities Tab refreshes to the basic Opportunities Sales Management page. Clicking on the + button expands available search criteria. 

Clicking on the – button reduces the available criteria.


By entering desired filtering criteria and the clicking the Search button, a result set of opportunities are displayed in the table below the search criteria input section.


Clicking on the **Details** link, opens the specific Opportunity Management page for the record represented by that row in the table.

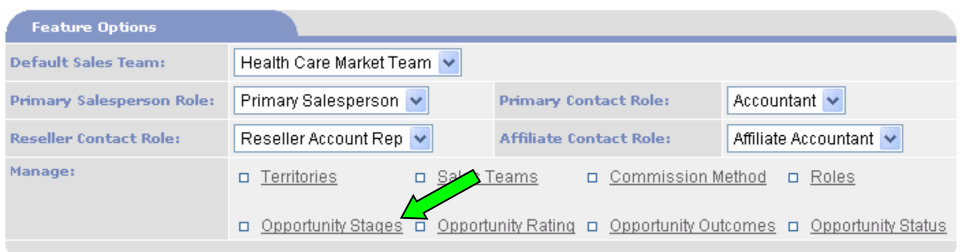
We explain the fields located on the Opportunities Sales Management page search section later in this chapter under the title "Opportunity Management Page". However, we shLL explain the Field: and For: options here. PORTALPRODIGY allows for the creation of custom data gathering forms for an unlimited number of Opportunity Types as needed for your organization. Your sales staff may wish to search for opportunities based on criteria collected into these custom fields. Therefore an option is provided to select from a list of custom fields located in the list at **Field:** All and the **For:** field is where the filtering criteria is entered.

- **Assignment Search Criteria Entry Field: -** “Primary Sales Rep”, “Sales Team”, and “All” as radio buttons. Default to “Primary Sales Rep”. Primary Sales Rep displays Opportunity records where logged user is the Primary Sales Rep. Sales Team displays Opportunity records where logged user is member of the Sales Team. All displays all Opportunities. Opportunities filtered by access rights.

- **Status Search Criteria Entry Field: -** “Open”, “Closed”, “All” as radio buttons. Defaults to “Open”.

- **Date Created Search Criteria Entry Field: -** the date the Opportunity record was created.

- **Stage Search Criteria Entry Field: -** displays selections in a list box. The values in the list box are customizable during administration setup on the Sales & Opportunities Features Management page by clicking on the Opportunity Stages Link. Following are some example stages you might implement: Lead, Verified Interest, Analysis Completed, Initial Presentation Scheduled, Initial Presentation Made, Assessment Completed, Quote Delivered, Initial Order and Re-work Quote.




- **Rating Search Criteria Entry Field: -** displays selections in a list box. The values in the list box are customizable during administration setup on the Sales & Opportunities Features Management page by clicking on the Opportunity Rating Link. Following are some example Ratings you might implement: High - Immediate Need, Medium - Planning Stage, Low - Vague Interest, and None - not qualified.

- **Outcome Search Criteria Entry Field: -** displays selections in a list box. The values in the list box are customizable during administration setup on the Sales & Opportunities Features Management page by clicking on the Opportunity Status Link. Following are some example Ratings you might implement: No Potential, Not Ready Follow Up Later and Made Purchase.

- **Type Search Criteria Entry Field: -** displays the Opportunity Type (Request Type Name). (See Request and Help Desk Features in Detail chapter of PortalProdigy Administrator’s Manual for more details on request types.). Request types are setup by the site administrator in advance of using Sales Management. Request Types are created by clicking on the Request Types Add Icon 

located in the Content Management menu of the site’s main Administration Menu (Ctrl-Alt-m). NOTE: when request types are setup using Request Type Management, one of several feature components is assigned to that request type record. Only requests for "Opportunity" are reported in Sales and Opportunity Management Opportunities Tab Section.

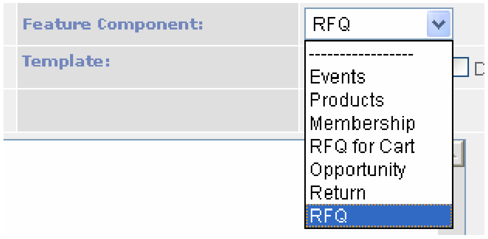
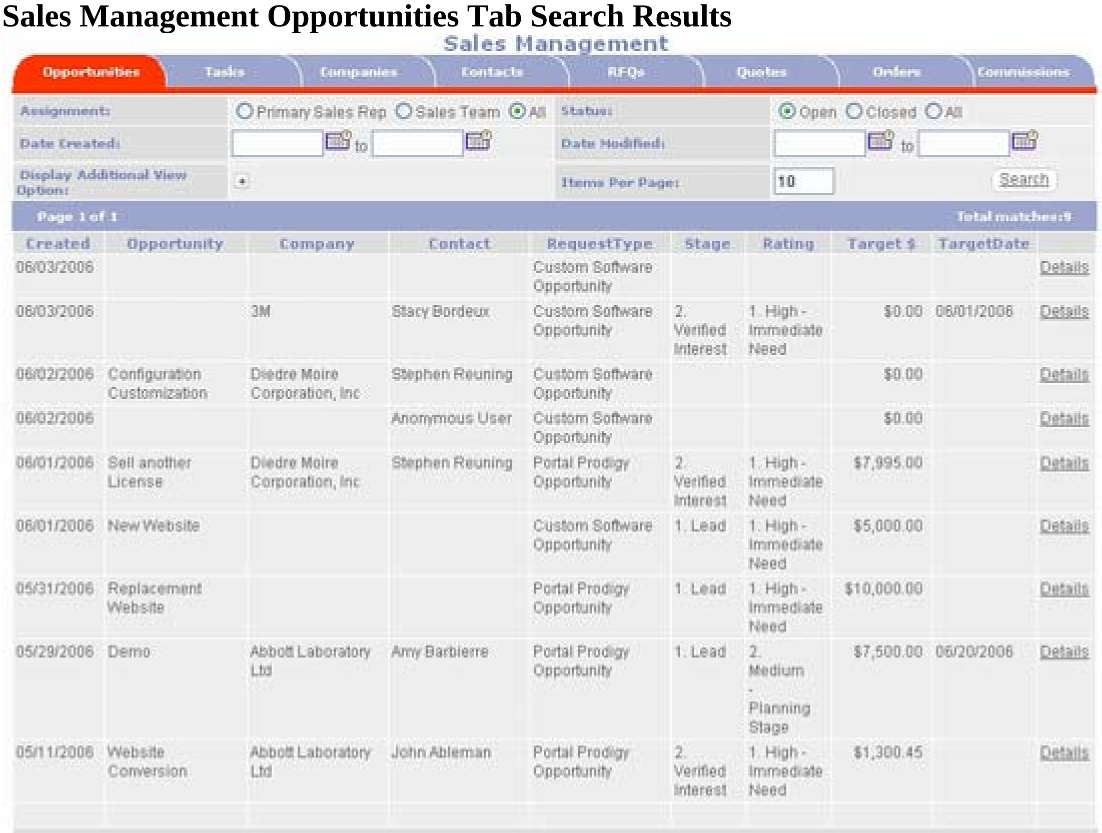



Figure from Request Type Management Page.

- **Sales Management Opportunities Tab Search Results**




| Created | Opportunity | Company | Contact | RequestType | Stage | Rating | Target $ | TargetDate | |
|---|---|---|---|---|---|---|---|---|---|
| 06/03/2006 | | | | Custom Software Opportunity | | | | | Details |
| 06/03/2006 | | 3M | Stacy Bordeux | Custom Software Opportunity | 2. Verified Interest | 1. High - Immediate Need | $0.00 | 06/01/2006 | Details |
| 06/02/2006 | Configuration Customization | Diedre Moire Corporation, Inc | Stephen Reuning | Custom Software Opportunity | | | $0.00 | | Details |
| 06/02/2006 | | | Anonymous User | Custom Software Opportunity | | | $0.00 | | Details |
| 06/01/2006 | Sell another License | Diedre Moire Corporation, Inc | Stephen Reuning | Portal Prodigy Opportunity | 2. Verified Interest | 1. High - Immediate Need | $7,995.00 | | Details |
| 06/01/2006 | New Website | | | Custom Software Opportunity | 1. Lead | 1. High - Immediate Need | $5,000.00 | | Details |
| 05/31/2006 | Replacement Website | | | Portal Prodigy Opportunity | 1. Lead | 1. High - Immediate Need | $10,000.00 | | Details |
| 05/29/2006 | Demo | Abbott Laboratory Ltd | Amy Barbierre | Portal Prodigy Opportunity | 1. Lead | 2. Medium - Planning Stage | $7,500.00 | 06/20/2006 | Details |
| 05/11/2006 | Website Conversion | Abbott Laboratory Ltd | John Ableman | Portal Prodigy Opportunity | 2. Verified Interest | 1. High - Immediate Need | $1,300.45 | | Details |

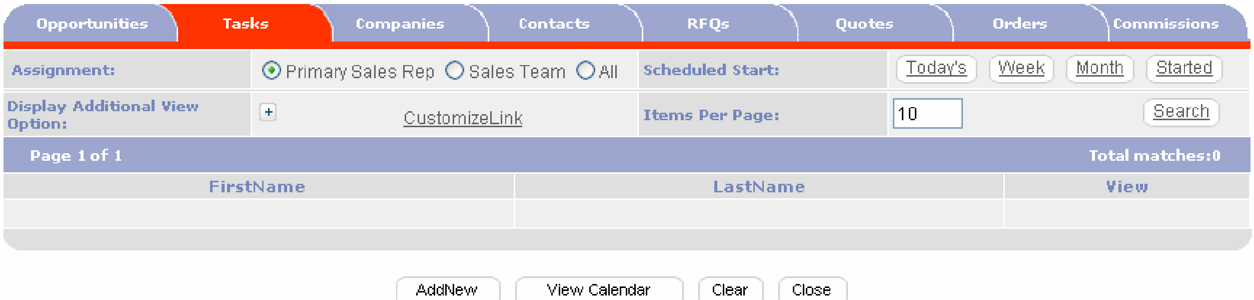
Clicking on the Search Button [Search] refreshes the screen with a set of opportunities, such results filtered against the criteria entered into the Search Criteria Entry Fields. The records reported may be **sorted** by clicking on the header of any column.

Clicking on the **Details** link, displays the Opportunity Management Record Detail for the corresponding opportunity.

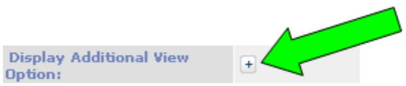
**Add New Opportunity –** Click on AddNew Button 

to add a new opportunity.

- **Sales Management Page Tasks Tab –** Displays list of Salesperson's Tasks.



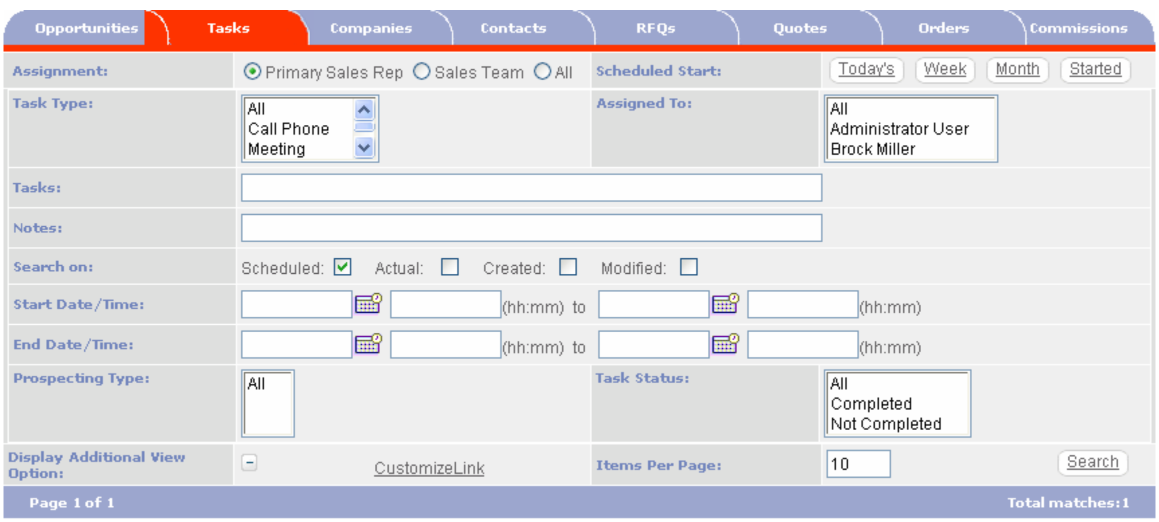

**Display Additional View Option: -** Clicking on the Tasks Tab refreshes to the basic Tasks Sales Management page. Clicking on the + button expands available search criteria.




Clicking on the – button reduces the available criteria.

By entering desired filtering criteria and the clicking the 

button, a result set of opportunities are displayed in the table below the search criteria input section.




- **Assignment Search Criteria Entry Field: -** "Primary Sales Rep", "Sales Team", and "All" as radio buttons. Default to "Primary Sales Rep". Primary Sales Rep displays Opportunity records where logged user is the Primary Sales Rep. Sales Team displays Opportunity records where logged user is member of the Sales Team. All displays all Opportunities. Opportunities filtered by access rights.

- **Scheduled Start Search Criteria Buttons:**

Today's – button that displays all tasks where Current Date falls within Scheduled Start and Scheduled End dates.

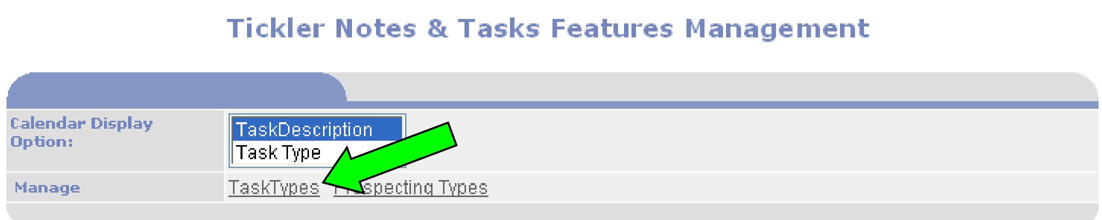
Week - button that displays all tasks where Current Week falls within Scheduled Start and Scheduled End dates.

Month - button that displays all tasks where Current Month falls within Scheduled Start and Scheduled End dates.

Started – button that displays all tasks with Actual Start Date and no Actual End Date and not completed.

- **Task Type Search Criteria Entry Field:** Displays a selection list based on available Task Types. (See Tickler & Notes chapter of PortalProdigy Administrator's Manual for more details on task types.). Task Types are customized by the administrator and accessed by clicking on the Features Menu Edit Icon 

located on the Site Management Menu of the site's Main Administration Menu. Then clicking on the Tasks link of the Feature Management page. Then clicking on the TaskTypes link.




Examples of Task types you might implement are: Call by Phone, Meeting, Produce Estimate, Review Specifications, etc.

- **Assigned to Search Criteria Entry Field:** Displays a selection lists based on individuals who have been assigned tasks.

- **Tasks Search Criteria Entry Field:** Enter text criteria which will be tested against tasks' task field.

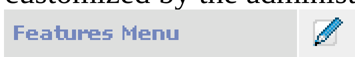
- **Notes Search Criteria Entry Field:** Enter text criteria which will be tested against tasks' note field.

- **Search On Search Criteria Entry Field:** Consists of four check boxes.


User may check any or all boxes. Criteria entered into Start and End Date & Time Fields will then be applied to the fields checked only.

- **Start Date/Time Search Criteria Entry Field:** Used to set start date and time range criteria to be filtered against fields checked in Search On field.

- **End Date/Time Search Criteria Entry Field:** Used to set end date and time range criteria to be filtered against fields checked in Search On field.

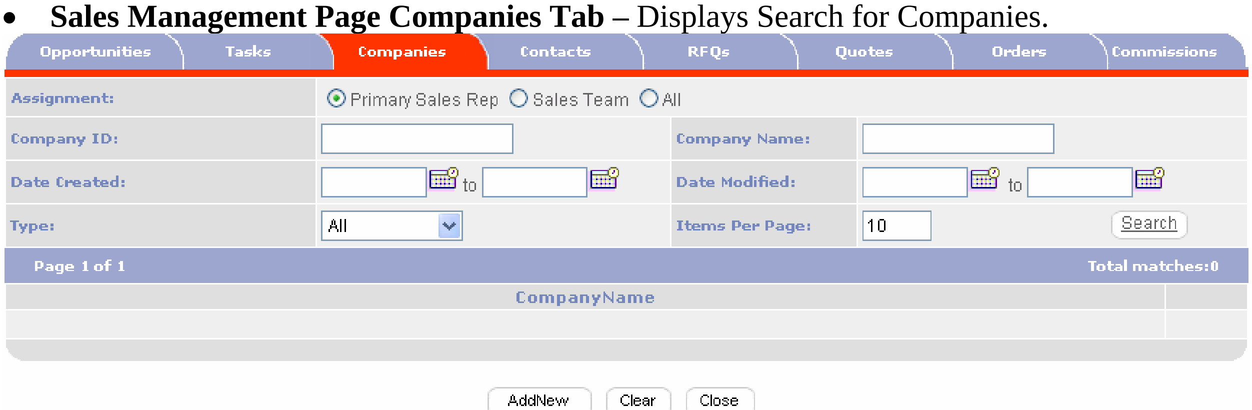
- **Prospecting Type Search Criteria Entry Field:** Displays a selection list based on available Prospecting Types. (See Tasks Ticklers & Notes chapter of PortalProdigy Administrator's Manual for more details on task types.). Prospecting Types are customized by the administrator and accessed by clicking on the Features Menu Edit Icon 

located on the Site Management Menu of the site's Main Administration Menu. Then clicking on the Tasks link of the Feature Management page. Then clicking on the TaskTypes link.


Examples of Prospecting types you might implement are: Decision maker, Decisionetc.

- **Task Status Search Criteria Entry Field:** Displays three possible selections: All, Completed or Not Completed.

- **Sales Management Page Companies Tab** – Displays Search for Companies.




- **Assignment Search Criteria Entry Field: -** "Primary Sales Rep", "Sales Team", and "All" as radio buttons. Default to "Primary Sales Rep". Primary Sales Rep displays Company records where logged user is the Primary Sales Rep. Sales Team displays Company records where logged user is member of the Sales Team. All displays all Companies filtered by access rights.

- **Company ID Search Criteria Entry Field:** Enter Company ID Number to search for a Company's Contact Record.

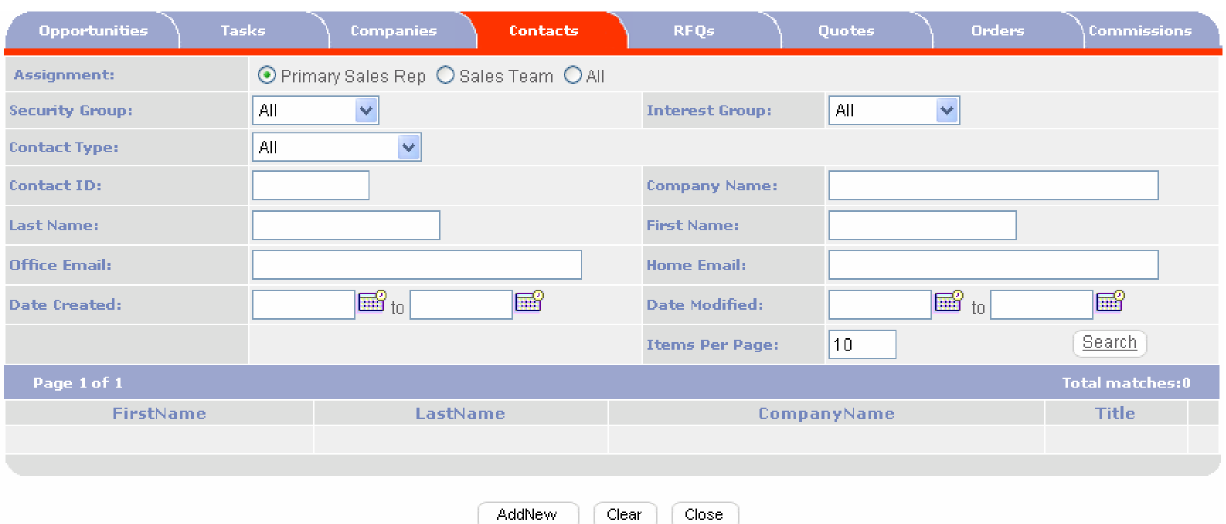
- **Company Name Search Criteria Entry Field:** Enter Company name to search for a Company's Contact Record.

- **Date Created Search Criteria Entry Field:** Enter a date range to search for company records created within the entered range.

- **Date Modified Search Criteria Entry Field:** Enter a date range to search for company records that were modified within the entered range.

- **Type Search Criteria Entry Field:** Presents a selection lists based on Company Types.

- **Sales Management Page Contacts Tab –** Displays Search for Contacts.




  - **Assignment Search Criteria Entry Field:** "Primary Sales Rep", "Sales Team", and "All" as radio buttons. Default to "Primary Sales Rep". Primary Sales Rep displays Contact records where logged user is the Primary Sales Rep. Sales Team displays Contact records where logged user is member of the Sales Team. All displays all Contacts filtered by access rights.

  - **Security Groups Search Criteria Entry Field:** Enter text criteria which will be tested against Contacts' Security selections.

  - **Interest Groups Search Criteria Entry Field:** Enter text criteria which will be tested against Contacts' Special Interests selections.

  - **Contact Type Search Criteria Entry Field:** Enter text criteria which will be tested against Contacts' Contact Type selections.

- **Contact ID Search Criteria Entry Field:** Enter Contact ID Number to search for a Specific Contact Record.

- **Company Name Search Criteria Entry Field:** Enter Company Name to search for Contacts attached to specific company records.

- **Last Name Search Criteria Entry Field:** Enter text criteria to search for contacts with a specific last name.

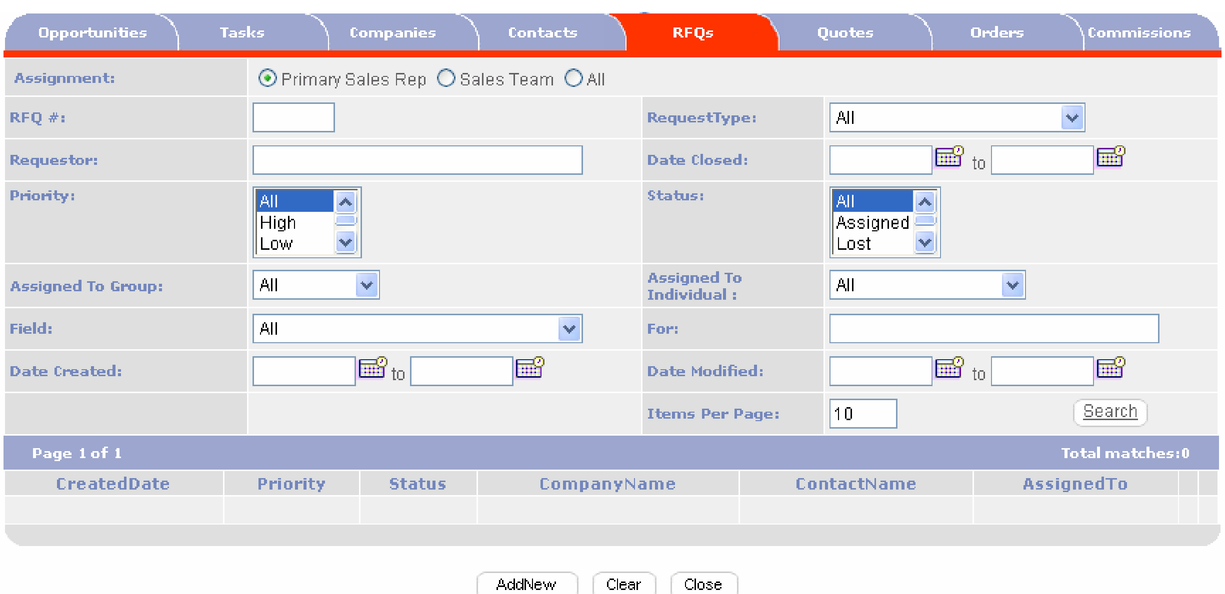
- **First Name Search Criteria Entry Field:** Enter text criteria to search for contacts with a specific first name.

- **Email Search Criteria Entry Field:** Enter text criteria to search for contacts with a specific email address or character string within their email address.

- **Date Created Search Criteria Entry Field:** Enter a date range to search for contact records created within the entered range.

- **Date Modified Search Criteria Entry Field:** Enter a date range to search for contact records modified within the entered range.

- **Sales Management Page RFQs Tab –** Search and Display list of Salesperson's Customer Requests for Quotes.




- **Assignment Search Criteria Entry Field:** "Primary Sales Rep", "Sales Team", and "All" as radio buttons. Default to "Primary Sales Rep". Primary Sales Rep displays RFQ records where logged user is the Primary Sales Rep. Sales Team displays RFQ records where logged user is member of the Sales Team. All displays all RFQ filtered by access rights.

- **RFQ# Search Criteria Entry Field:** Enter RFQ ID Number to search for a Specific Request for Quote Record.

- **Request Type Search Criteria Entry Field:** displays the "Request for Quote" Request Type list (Request Type Name). (See Request and Help Desk Features in Detail chapter of PortalProdigy Administrator's Manual for more details on request types.). Request types are setup by the site administrator in advance of using Sales Management. Request Types are created by clicking on the Request Types Add Icon 

located in the Content Management menu of the site's main Administration Menu. NOTE: when request types are setup using Request Type Management, one of several feature components is assigned to that request type record. Only requests for "RFQ" or "RFQ from Cart" are reported in Sales and Opportunity Management RFQ Tab section .

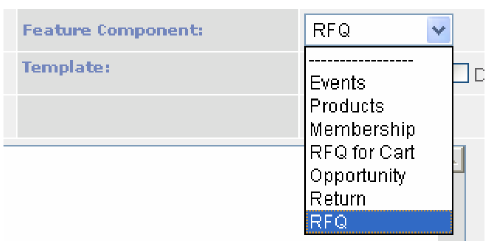


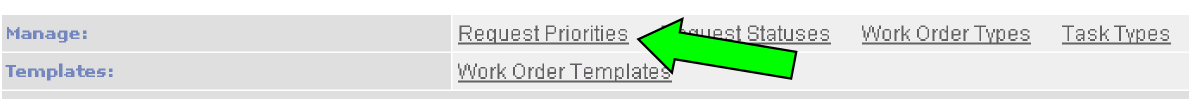
Figure from Request Type Management Page.

- **Customer/Requestor Search Criteria Entry Field:** Enter text criteria (name) to search for Requests for Quotes submitted by a specific Contact.

- **Date Closed Search Criteria Entry Field:** Enter a date range to search for RFQ records closed within the entered range.

- **Priority Search Criteria Entry Field:** Displays a selection List that may be customized by administrator in Request Types management and accessed by clicking on the Features Menu Edit Icon 

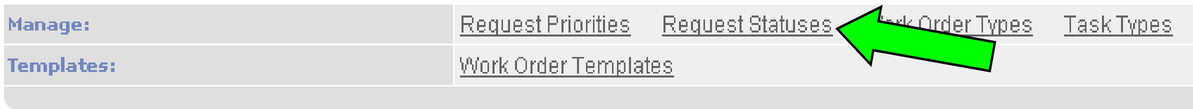
located on the Site Management Menu of the site's Main Administration Menu. Then clicking on the Requests Link. Then click on RequestPriorities Link. Examples of Priority selections you might implement are High, Low, Standard.




- **Status Search Criteria Entry Field:** Displays a selection List that may be customized by administrator in Request Types management and accessed by clicking on the Features Menu Edit Icon 

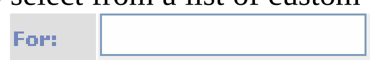
located on the Site Management Menu of the site's Main Administration Menu. Then clicking on the Requests Link. Then click on

RequestStatuses (Request Status) Link. Examples of Status selections you might implement are: Assigned, Pending, Priced, Sold.

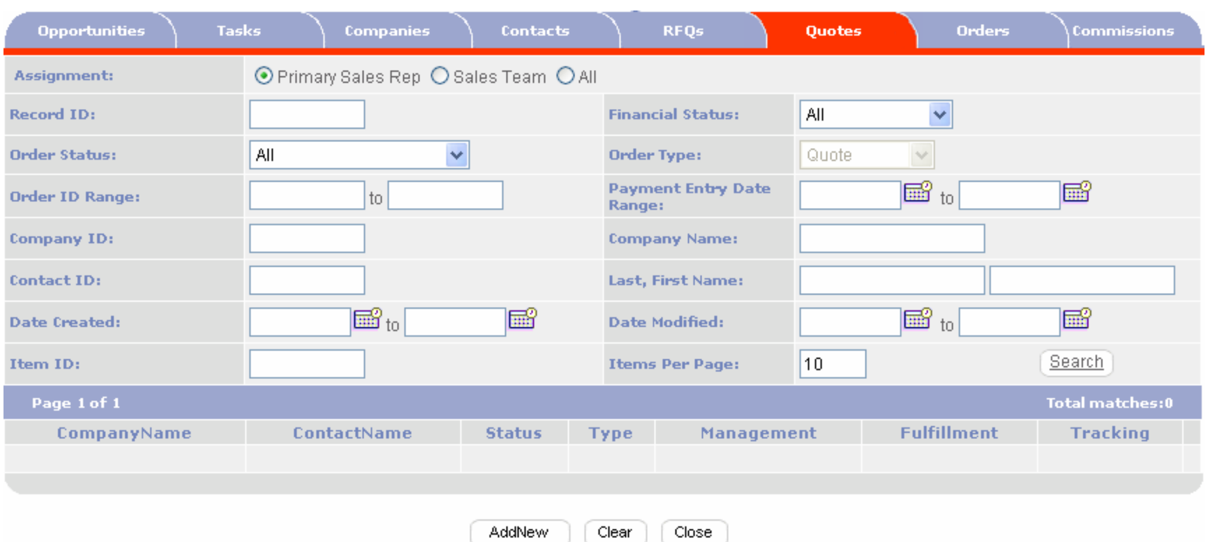



- **Assigned to Group Search Criteria Entry Field:** Lists all Security Groups.

- **Assigned to Individual Search Criteria Entry Field:** lists all contacts of Contact Type = Employee.

- **Field and For Search Criteria Entry Field: -** PORTALPRODIGY allows for the creation of custom data gathering forms for an unlimited number of Request Types as needed for your organization. Your sales staff may wish to search for opportunities based on criteria collected into these custom fields. Therefore an option is provided to select from a list of custom fields located in the list at   and the   field is where the filtering criteria is entered.   field is where the filtering criteria is entered. The fields selectable in the Field entry box is a compilation of all the questions created in the Form Builder of every Request Type where the Feature Component is set to "RFQ" or "RFQ from Cart".

- **Sales Management Page Quotes Tab –** Search and displays list of Salesperson's Customer Quotes.




- **Assignments Search Criteria Entry Field:** "Primary Sales Rep", "Sales Team", and "All" as radio buttons. Default to "Primary Sales Rep". Primary Sales Rep displays

Quote records where logged user is the Primary Sales Rep. Sales Team displays Quote records where logged user is member of the Sales Team. All displays all Quotes filtered by access rights.

- **Record ID Search Criteria Entry Field:** Enter a quote's Record Number to search for a specific quote.

- **Financial Status Search Criteria Entry Field:** Select "Pending", "Approved or "Declined" to filter quotes based on Financial Status. Unlike many of the selection lists used in PORTALPRODIGY, the financial status selections are hard coded and may not be customized because the selections are used by the logic of certain business processes preprogrammed into the application.

- **Quote Status Search Criteria Entry Field:** Select "Shopping Cart", "Checkout", "Pending", "Partially Fulfilled", "Fulfilled", "Completed", "Canceled", "OnHold", "OnHold Submitted", "OnHold Pending", and "OnHold Partially Fulfilled". Unlike many of the selection lists used in PORTALPRODIGY, the order status selections are hard coded and may not be customized because the selections are used by the logic of certain business processes preprogrammed into the application. (Learn more in the "Order Management" section of this manual.)

- **Order Type Search Criteria Entry Field:** This field value always locks to "Quote" when conducting a search from the "Quote" tab of the "Sales Management" page.

- **Quote ID Range Search Criteria Entry Field:** Enter the Quote ID Number range (Order Numbers) to search for a specific range of quotes.

- **Payment Entry Date Range Search Criteria Entry Field:** Enter a date range to search for quotes which received payments within the entered range.

- **Company ID Search Criteria Entry Field:** Enter Company ID Number to search for a Company's quote records.

- **Company Name Search Criteria Entry Field:** Enter Company name to search for a Company's quote records.

- **Contact ID Search Criteria Entry Field:** Enter Contact ID Number to search for a contact's quote records.

- **Last Name Search Criteria Entry Field:** Enter text criteria to search for quote records assigned to a specific last name.

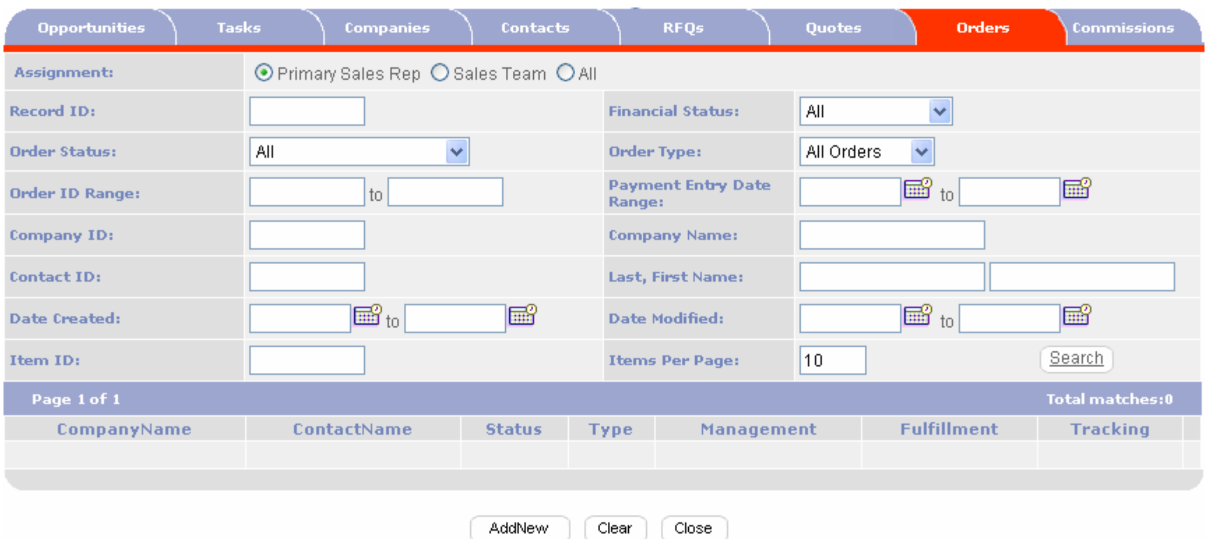
- **First Name Search Criteria Entry Field:** Enter text criteria to search for quote records assigned to a specific first name.

- **Date Created Search Criteria Entry Field:** Enter a date range to search for quote records created within the entered range.

- **Date Modified Search Criteria Entry Field:** Enter a date range to search for quote records modified within the entered range.

- **Item ID Search Criteria Entry Field:** Enter an Item ID to search for quotes related to a specific item. Item ID numbers are automatically assigned as unique identification numbers when item/products are entered into Items Management. These are typically products listed in the website's catalog.

- **Sales Management Page Orders Tab –** Search and displays list of Salesperson's Customer Orders.




- **Assignments Search Criteria Entry Field:** "Primary Sales Rep", "Sales Team", and "All" as radio buttons. Default to "Primary Sales Rep". Primary Sales Rep displays Order records where logged user is the Primary Sales Rep. Sales Team displays Order records where logged user is member of the Sales Team. All displays all Orders filtered by access rights.

- **Record ID Search Criteria Entry Field:** Enter an order's Record Number to search for a specific order.

- **Financial Status Search Criteria Entry Field:** Select "Pending", "Approved or "Declined" to filter orders based on Financial Status. Unlike many of the selection lists used in PORTALPRODIGY, the financial status selections are hard coded and may not be customized because the selections are used by the logic of certain business processes preprogrammed into the application.

- **Order Status Search Criteria Entry Field:** Select "Shopping Cart", "Checkout", "Pending", "Partially Fulfilled", "Fulfilled", "Completed", "Canceled", "OnHold", "OnHold Submitted", "OnHold Pending", and "OnHold Partially Fulfilled". Unlike many of the selection lists used in PORTALPRODIGY, the order status selections are hard coded and may not be customized because the selections are used by the logic of certain business processes preprogrammed into the application. (Learn more in the "Order Management" section of this manual.)

- **Order Type Search Criteria Entry Field:** Select "All Orders", "Order", "Quote", "Recurring", "Return", "Credit Memo", or "Back Order". Unlike many of the selection lists used in PORTALPRODIGY, the order type selections are hard coded and may not be customized because the selections are used by the logic of certain business processes preprogrammed into the application. (Learn more in the "Order Management" section of this manual.)

- **Order ID Range Search Criteria Entry Field:** Enter the Order ID Number range (Order Numbers) to search for a specific range of orders.

- **Payment Entry Date Range Search Criteria Entry Field:** Enter a date range to search for orders which received payments within the entered range.

- **Company ID Search Criteria Entry Field:** Enter Company ID Number to search for a Company's order records.

- **Company Name Search Criteria Entry Field:** Enter Company name to search for a Company's order records.

- **Contact ID Search Criteria Entry Field:** Enter Contact ID Number to search for a contact's order records.

- **Last Name Search Criteria Entry Field:** Enter text criteria to search for order records assigned to a specific last name.

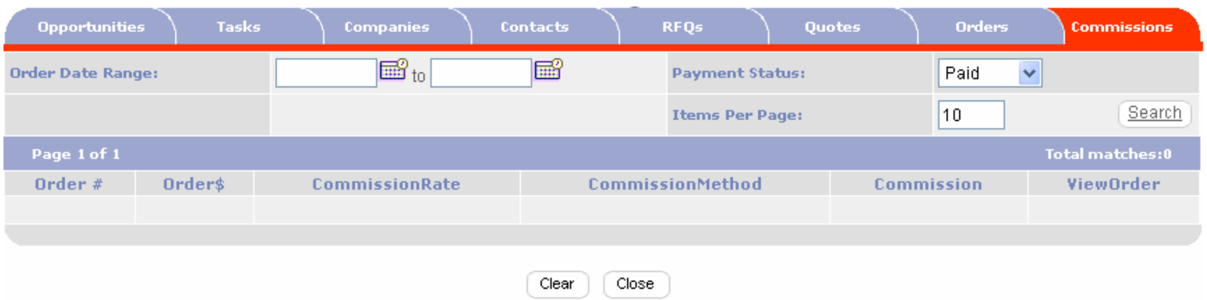
- **First Name Search Criteria Entry Field:** Enter text criteria to search for order records assigned to a specific first name.

- **Date Created Search Criteria Entry Field:** Enter a date range to search for order records created within the entered range.

- **Date Modified Search Criteria Entry Field:** Enter a date range to search for order records modified within the entered range.

- **Item ID Search Criteria Entry Field:** Enter an Item ID to search for orders related to a specific item. Item ID numbers are automatically assigned as unique identification numbers when item/products are entered into Items Management. These are typically products listed in the website's catalog.

- **Sales Management Page Commissions Tab –** (*Not Yet Activated Feature*) Search and display list of Salespersons commissions from Orders.




## 1.3.2 Opportunity Management Page

The Opportunity Management page is called from the Sales Management page and opened as new window. It is used to view all data related to a specific Opportunity.

Clicking on the Details link of a result in the Opportunities Sales Management page opens the specific Opportunity Management page for the record represented by that row in the table.

The Opportunity Management page looks similar to the Sales Management page but differs in that all the reported data is "opportunity centric" being filtered for the specific opportunity record selected upon entry into the Opportunity Management page. It also differs in possible search criteria for many cases.

The Opportunity Management Page provides access to the different components of the Opportunity Management System via clickable tabs. Upon clicking a tab, the system refreshes the page to present the corresponding search, add and report interface. From the Opportunity Management page, one can access the following types of records: Sales Opportunities, Tasks and Assignments related directly to the specific opportunity, Company and Contacts related directly to the specific opportunity, Requests-for-Quotes related directly to the specific opportunity, Quotes related directly to the specific opportunity, Orders, Work Orders and Purchases related directly to the specific opportunity, and Attachments related directly to the specific opportunity.

The Opportunity Management Page displays the following tabs:

- **Opportunity –** Displays details about the selected Opportunity. This page is displayed by default when Opportunity Mgmt. page is selected.

- **Tasks –** Displays all tasks for selected Opportunity.

- **Company –** Displays the company record in Company Management page for the selected Opportunity.

- **Contacts –** Displays the Contacts related to the Opportunity.

- **RFQs –** Displays all Quote Requests related to the selected Opportunity.

- **Quotes –** Displays all Quotes related to the selected Opportunity.

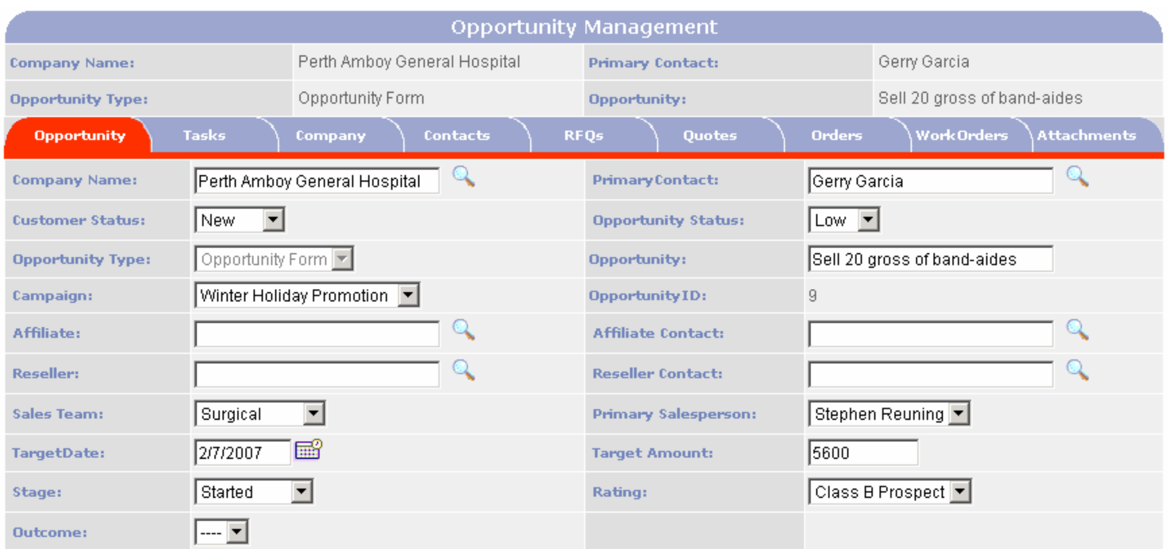
- **Orders –** Displays all Orders related to the selected Opportunity.

- **Work Orders –** Displays all Work Orders related to the selected Opportunity.

- **Attachments –** Displays all attachments for Tasks related to the selected Opportunity.

- **Opportunity Management Opportunity Tab :**

The Company Name, Primary Contact, Opportunity Type, and Opportunity Description autofill into the top of the Opportunity Management page. If any of these fields appears blank, then the data was not entered when the opportunity record was created or updated. When clicked, the Opportunity tab appears red and the Opportunity Record Input page is displayed in the browser.




- **Company Name Text Entry Field: -** Data can be entered into this field without linking it to a company record simply by typing text. However, it may be desirable to have an Opportunity Record related or linked directly to a specific Company Record. In such a case, the search  icon should be clicked to activate the company search interface.

The Company Record should be located and selected or created and selected. Once selected the user will be returned to the Opportunity Management page and the Company field will auto fill.

- **Primary Contact Text Entry Field: -** Data can be entered into this field without linking it to a contact record simply by typing text. However, it may be desirable to have an Opportunity Record related or linked directly to a specific Contact's Record. In such a case, the search  icon should be clicked to activate the contact search interface. The Contact Record should be located and selected or created and then selected. Once selected the user will be returned to the Opportunity Management page and the Primary Contact field will auto fill.

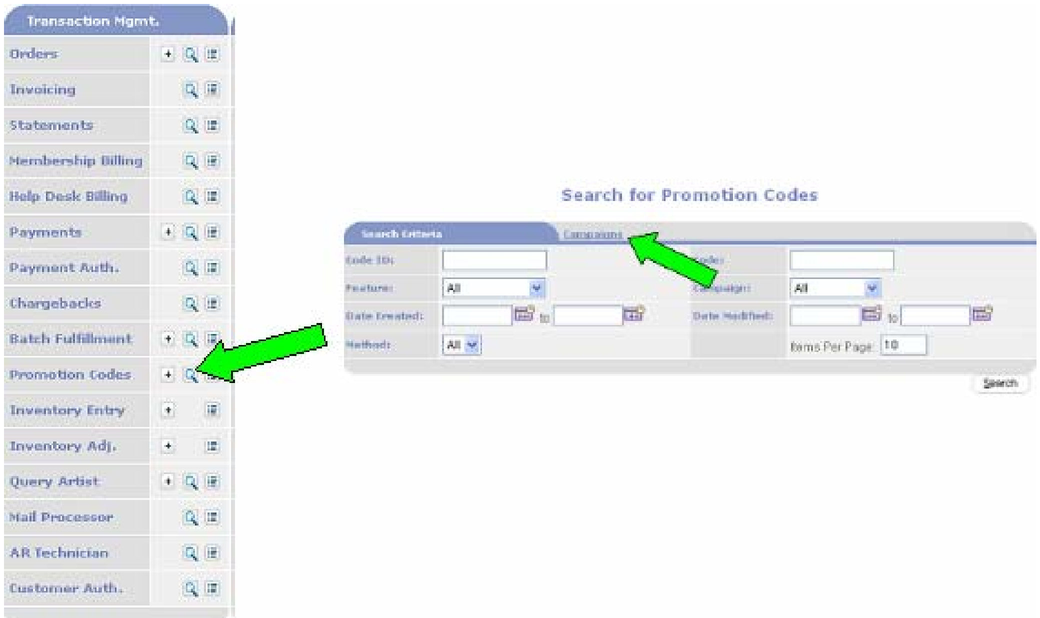
- **Customer Status Selection Entry Field: -** Unlike many of the selection lists used in PORTALPRODIGY, the Customer Status selections are hard coded and may not be customized because the selections are used by the logic of certain business processes preprogrammed into the application. Either "New" or "Existing" may be selected.

- **Opportunity Status Selection Entry Field: -** This field is used to indicate the opportunities location in the selling process. For example, Fresh Lead, Contact and Rapport Building, Qualifying and Info Gathering, Awaiting Presentation, Negotiations, On Hold, Requires Closing, Closed. The selections are customizable and usually set up by the administrator before engaging the Opportunity Management system. Opportunity Status selections may be added or updated by an authorized administrator at the Sales and Opportunity Features Management page. (Ctrl-Alt-m => Site Management/Features => Sales & Opportunity => Opportunity Status)

- **Opportunity Type Selection Entry Field: -** Just below the Outcome Filed is a light blue horizontal divider. The fields below this demarcation are a customized form which results from the item selected in the Opportunity Type selection field described above. In other words, the page will look different from this line down depending on which Opportunity Type is selected. The forms are created in advance of engaging the Opportunity Management system. Opportunity Type selections may be added or updated by an authorized administrator at the Request Type Management page. (Ctrl-Alt-m => Content Management/Request Types => Search and edit or Add New) If the Feature Component field on the Request Type Management page is set to "Opportunity" then the Request Type will be listed in the Opportunity Type Selection Entry Field.

- **Opportunity (Description) Text Entry Field: -** This is a free form test box to enter a brief description of opportunity or lead.

- **Campaign Selection Entry Field: -** Campaigns are used to link sales opportunities for multiple companies. For example, a campaign could be created for a new product offering. In such a case, an opportunity would be created for each client that is a prospect for the new product offering. The campaign allows the business to analyze and report on the results of the new product offering for all clients. Campaigns are created by clicking on the Promotion Codes Browse Icon located in the Transaction Management Menu of the site's Main Administration Menu (Ctrl-Alt-m). Then clicking on the Campaigns link located on the Search for Promotion Codes Page. (See Chapter titled "Promotion Codes in Detail" – Subsection = How to create New Campaign.)




- **Affiliate Lookup Entry Field: -** Generally, an 'Affiliate' is a company that is getting paid to refer business. Data must be linked directly to a specific Affiliate's Company Record. In such a case, the search  icon should be clicked to activate the company search interface. The Company Record should be located and selected or created and selected. Once selected the user will be returned to the Opportunity Management page and the Affiliate field will auto fill. NOTE: Look ups from this field are filtered for Company Records with the Company Type value selected as "Affiliate". The look up search will not report back companies that are not typed as affiliates even if the name matches your search criteria. Furthermore, if you create a new company record, be sure to check the Affiliate Company Type before saving or the company name entered into this field will be nulled by the system upon saving.

- **Affiliate Contact Lookup Field: - -** Generally, an 'Affiliate Contact' is an individual that is getting paid to refer business. Data must be linked directly to a specific Affiliate Contact's Contact Record. In such a case, the search  icon should be clicked to activate the contact search interface. The Contact Record should be located and selected or created and selected. Once selected the user will be returned to the Opportunity Management page and the Affiliate Contact field will auto fill. NOTE: Look ups from this field are filtered for Contact Records with the Contact Type value selected as "Affiliate". The look up search will not report back contacts that are not typed as affiliates even if the name matches your search criteria. Furthermore, if you create a new contact record, be sure to check the Affiliate Contact Type before saving or the contact name entered into this field will be nulled by the system upon saving.

- **Reseller Lookup Entry Field: -** A ‘Reseller’ is a *separate* company or individual that sells your products or services. Data must be linked directly to a specific Reseller’s Company Record. In such a case, the search icon should be clicked to activate the company search interface. The Company Record should be located and selected or created and selected. Once selected the user will be returned to the Opportunity Management page and the Reseller field will auto fill. NOTE: Look ups from this field are filtered for Company Records with the Company Type value selected as “Reseller”. The look up search will not report back companies that are not typed as resellers even if the name matches your search criteria. Furthermore, if you create a new company record, be sure to check the Reseller Company Type before saving or the company name entered into this field will be nulled by the system upon saving.

- **Reseller Contact Lookup Entry Field: -** Data must be linked directly to a specific Reseller Contact’s Contact Record. In such a case, the search icon should be clicked to activate the contact search interface. The Contact Record should be located and selected or created and selected. Once selected the user will be returned to the Opportunity Management page and the Reseller Contact field will auto fill. NOTE: Look ups from this field are filtered for Contact Records with the Contact Type value selected as “Reseller”. The look up search will not report back contacts that are not typed as resellers even if the name matches your search criteria. Furthermore, if you create a new contact record, be sure to check the Reseller Contact Type before saving or the contact name entered into this field will be nulled by the system upon saving.

- **Sales Team Selection Entry Field: -** The ‘Sales Team’ are members of the sales staff, typically your employees. This field is used to indicate the team responsible for the selling process. The selections are customizable and usually set up by the administrator before engaging the Opportunity Management system. Sales Team selections may be added or updated by an authorized administrator at the Sales and Opportunity Features Management page. (Ctrl-Alt-m => Site Management/Features => Sales & Opportunity => Sales Team)

- **Primary Salesperson Selection Entry Field: -** When contact records for your sales staff are created in PORTALPRODIGY, the “Sales Team” Contact Type box should be selected. If it is selected and Sales Teams have been created in Sales & Opportunity Feature Management, then Sales Team roles will be assignable under the security tab of the contact record. When a Sales Team is selected in the prior Sales Team Selection Entry Field, all contacts with roles on the selected team are made available in the Primary Salesperson Selection Entry Field.

- **Target Date Entry Field: -** This is a simple text entry field for searching purpose and reporting. It does not trigger anything in task management.

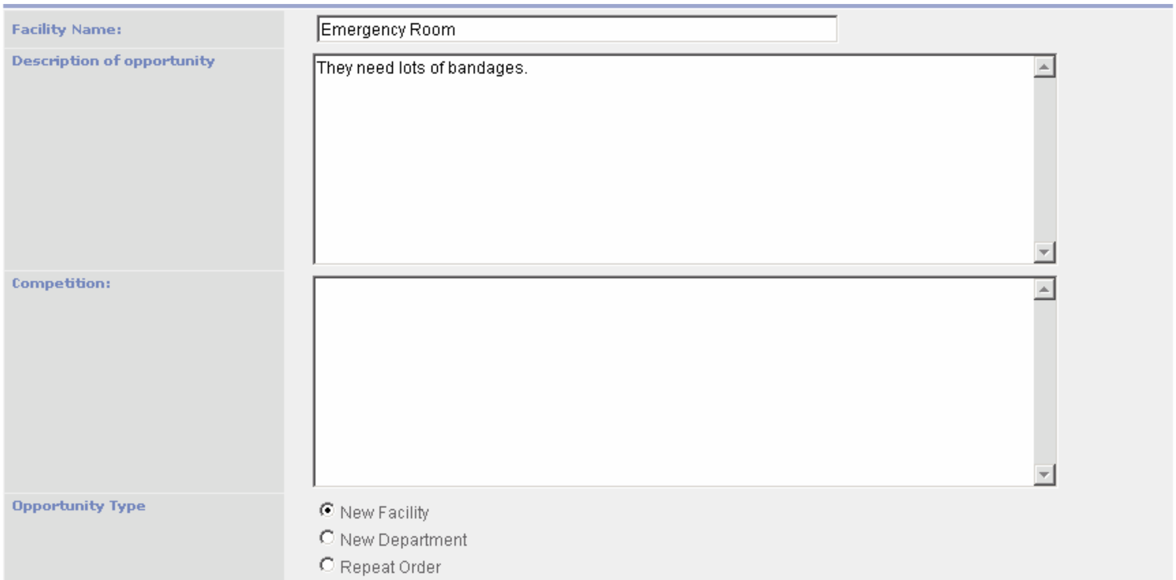
- **Target Amount Text Entry Field: -** This is a simple text entry field for searching purpose and reporting. It does not trigger anything in task management.

- **Stage Selection Entry Field: -** This is a secondary (primary can be Opportunity Status) field used to indicate the opportunities location in the selling process. For example, New, Awaiting Review, Closed. The selections are customizable and usually set up by the administrator before engaging the Opportunity Management system. Opportunity Stage selections may be added or updated by an authorized administrator at the Sales and Opportunity Features Management page. (Ctrl-Alt-m => Site Management/Features => Sales & Opportunity => Opportunity Stage)

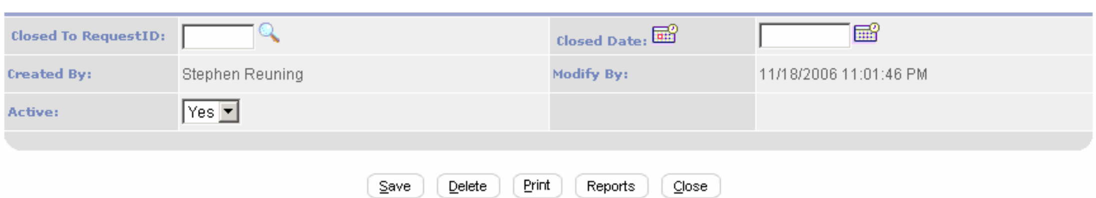
- **Rating Selection Entry Field: -** This field is used to rank the opportunity's potential. For example, Immediate Need, Planning Stage, Just Shopping, Vague Interest, Not Qualified. The selections are customizable and usually set up by the administrator before engaging the Opportunity Management system. Opportunity Stage selections may be added or updated by an authorized administrator at the Sales and Opportunity Features Management page. (Ctrl-Alt-m => Site Management/Features => Sales & Opportunity => Opportunity Rating)

- **Outcome Selection Entry Field: -** This field is used to indicate the final result of the opportunity. For example, Referral, Purchased Product, Not Sold. The selections are customizable and usually set up by the administrator before engaging the Opportunity Management system. Opportunity Stage selections may be added or updated by an authorized administrator at the Sales and Opportunity Features Management page. (Ctrl-Alt-m => Site Management/Features => Sales & Opportunity => Opportunity Outcomes)

**SAMPLE CUSTOMIZABLE FORM SECTION Determined by Opportunity Type Selection**




Just below the Outcome Filed is a light blue horizontal divider. The fields below this demarcation are a customized form which results from the item selected in the Opportunity Type selection field described above. In other words, the page will look different from this line down depending on which Opportunity Type is selected. The forms are created in advance of engaging the Opportunity Management system. Opportunity Type selections may be added or updated by an authorized administrator at the Request Type Management page. (Ctrl-Alt-m => Content Management/Request Types => Search and edit or Add New) If the Feature Component field on the Request Type Management page is set to "Opportunity" then the Request Type will be listed in the Opportunity Type Selection Entry Field.




- **Closed to Request ID Lookup Field:** - This field is used to deactivate an opportunity record when the opportunity is still open but another record is actively being used to administer the opportunity. Sometimes a sales team member will discover that an opportunity or lead is already entered as another record or request after inputting a lead but for some reason doesn't want to delete this record. In such a case, this record may be closed but linked to another essentially creating an audit trail.

- **Closed Date Entry Filed: -** Used to indicate the date an opportunity was deactivated and linked to another record, as indicated in the Closed to Request ID Lookup Field.

- **Active Yes/No Selection Entry Field:** - By default this value is set to "Yes", which means the record is active and available for use. To deactivate a record, set it to "No". Deactivating a record is a logical form of deletion. It is used to remove the record from future use, yet maintain the relationship with existing data. Reports by default only include active records; however, there is a reporting option that allows inclusion of deactivated records.

- **Opportunity Management Tasks Tab :**


- **Company Name Reporting Display Field:** Displays the Company Name for the specific Opportunity record that is activated. (Click the Opportunity tab to view the specific opportunity record that is activated.)

- **Primary Contact Reporting Display Field:** Displays the Primary Contact Name for the specific Opportunity record that is activated. (Click the Opportunity tab to view the specific opportunity record that is activated.)

- **Opportunity Type Reporting Display Field:** Displays the Opportunity Type for the specific Opportunity record that is activated. (Click the Opportunity tab to view the specific opportunity record that is activated.)

- **Opportunity Reporting Display Field:** Displays the Opportunity (Description) Text for the specific Opportunity record that is activated. (Click the Opportunity tab to view the specific opportunity record that is activated.)

- **Assignments Search Criteria Entry Field:** "Primary Sales Rep", "Sales Team", and "All" as radio buttons. Default to "Primary Sales Rep". Primary Sales Rep displays Task records where logged user is the Primary Sales Rep. Sales Team displays Task records where logged user is member of the Sales Team. All displays all Tasks filtered by access rights. <u>And,</u> all for the specific Opportunity record that is activated.

- **Display Additional View Option:** - Clicking on the Opportunity Tasks Tab refreshes to the basic Opportunity Tasks Management page. Clicking on the + button expands available search criteria. 

Clicking on the – button reduces the available criteria.

By entering desired filtering criteria and the clicking the 

button, a result set of opportunities are displayed in the table below the search criteria input section.

- **Scheduled Start Search Criteria Buttons:**

  Today's – button that displays all tasks related to the specifically selected opportunity where Current Date falls within Scheduled Start and Scheduled End dates.

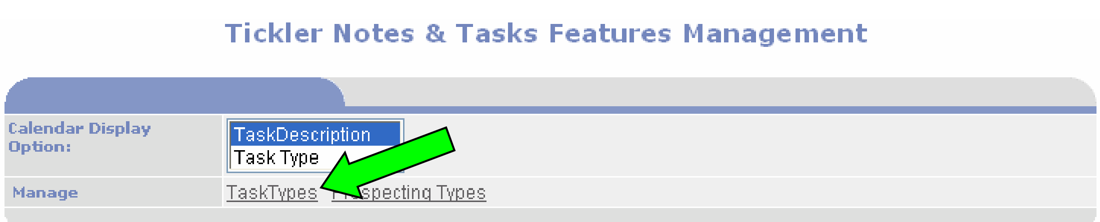
  Week - button that displays all tasks related to the specifically selected opportunity where Current Week falls within Scheduled Start and Scheduled End dates.

  Month - button that displays all tasks related to the specifically selected opportunity where Current Month falls within Scheduled Start and Scheduled End dates.

  Started – button that displays all tasks related to the specifically selected opportunity with Actual Start Date and no Actual End Date and not completed.

- **Task Type Search Criteria Entry Field:** Displays a selection list based on available Task Types. (See Tasks & Tickler Notes Features in Detail chapter of PortalProdigy Administrator's Manual for more details on task types.). Task Types are setup by the site administrator in advance of using Sales Management and customized by the administrator and accessed by clicking on the Features Menu Edit Icon 

located on the Site Management Menu of the site's Main Administration Menu. Then clicking on the Tasks link of the Feature Management page. Then clicking on the TaskTypes link.



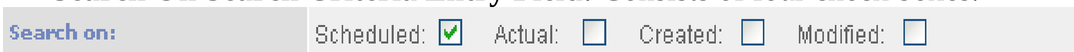

  Examples of Task types you might implement are: Call by Phone, Meeting, Produce Estimate, Review Specifications, etc.

- **Assigned to Search Criteria Entry Field:** Displays a selection list based on individuals who have been assigned tasks.

- **Tasks Search Criteria Entry Field:** Enter text criteria which will be tested against tasks' task (description) field. Locates any set of characters "contained" in field.

- **Notes Search Criteria Entry Field:** Enter text criteria which will be tested against opportunity's note field. Locates any set of characters "contained" in field.

- **Search On Search Criteria Entry Field:** Consists of four check boxes.



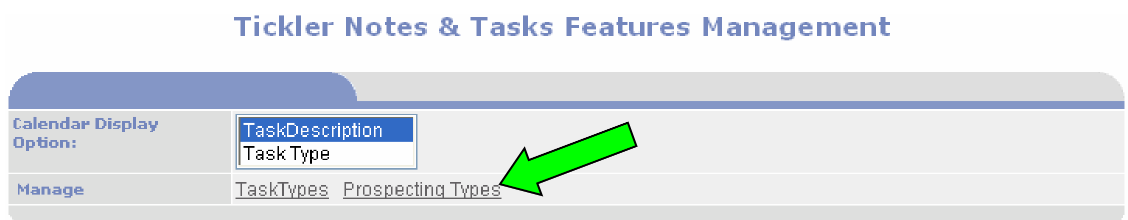

  User may check any or all boxes. Criteria entered into Start and End Date & Time Fields will then be applied to the fields checked only.

- **Start Date/Time Search Criteria Entry Field:** Used to set start date and time range criteria to be filtered against fields checked in Search On field.

- **End Date/Time Search Criteria Entry Field:** Used to set end date and time range criteria to be filtered against fields checked in Search On field.

- **Prospecting Type Search Criteria Entry Field:** Displays a selection list based on available Prospecting Types. (See Tasks and Tickler Notes Feature in Detail chapter of PortalProdigy Administrator's Manual for more details on task types.). Prospecting Types are setup by the site administrator in advance of using Sales Management and customized by the administrator and accessed by clicking on the Features Menu Edit Icon 

 located on the Site Management Menu of the site's Main Administration Menu. Then clicking on the Tasks link of the Feature Management page. Then clicking on the ProspectingTypes link.



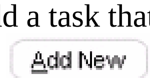

  Examples of Prospecting types you might implement are: Decision maker, Decision, etc.

- **Task Status Search Criteria Entry Field:** Displays three possible selections: All, Completed or Not Completed.

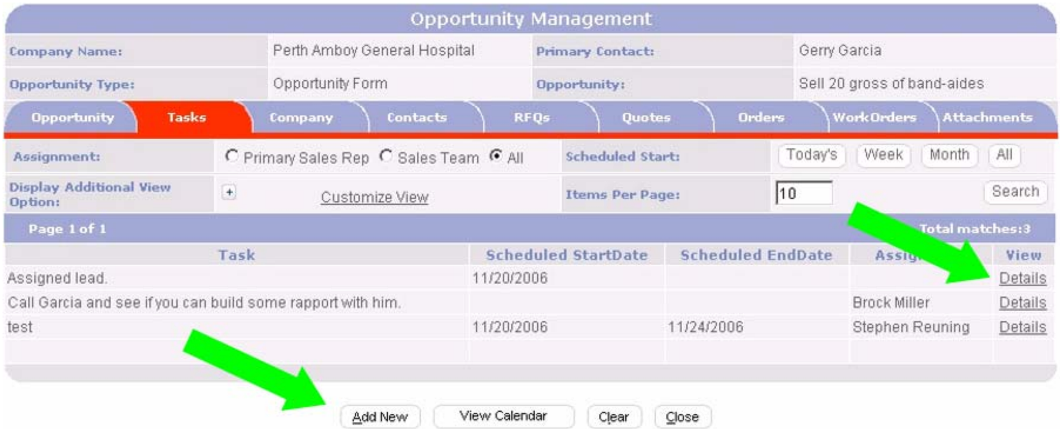
- **Customize View Link :** Click on **Customize View** link to display field view check boxes which determine the columns to be displayed in search result table below.

Clicking the 

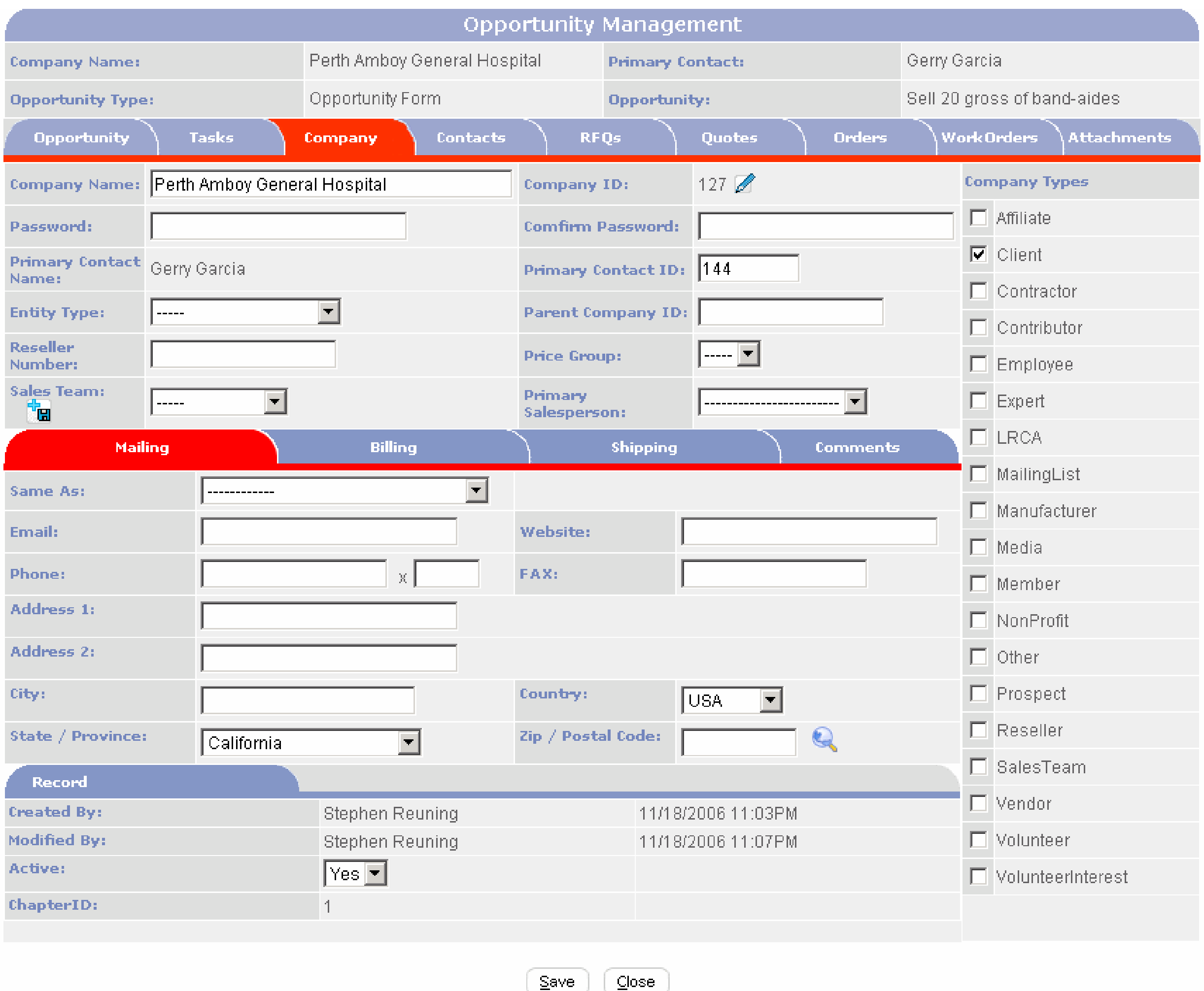
 button will search for tasks related to the specifically activated opportunity based on the criteria entered into the previously described search entry fields. All matching tasks will be listed in the table below the search criteria input area.

Click on the Details Link to view the complete task record for any task reported in the result table. If you wish to add a task that will be related to the specifically activated sales opportunity then click on the 

 button.



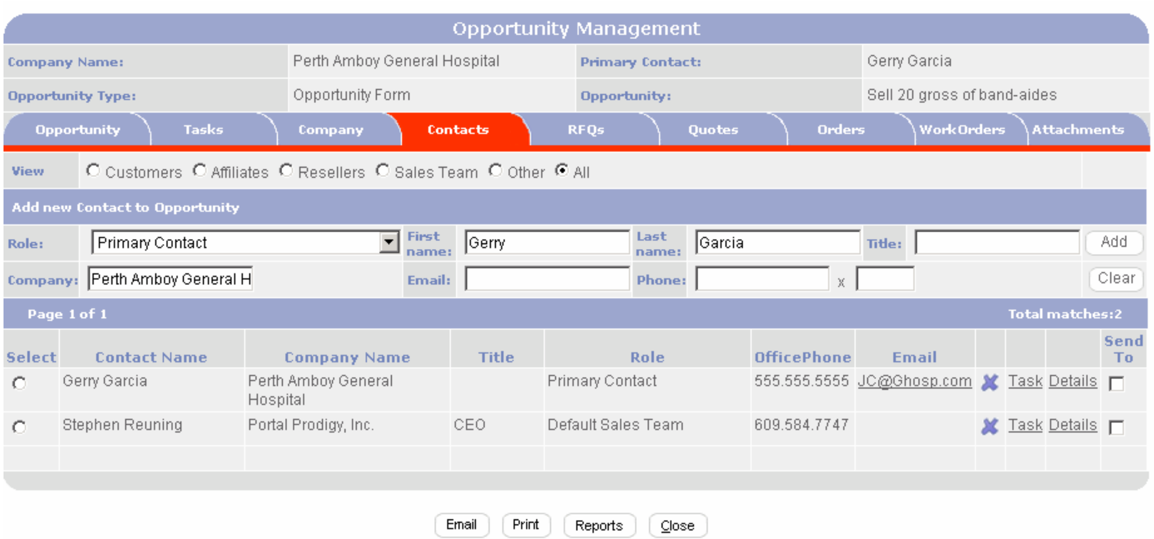

- **Opportunity Management Company Tab :**




Clicking on the Company Tab of the Opportunity Management page links the user to the related company's record page data. This is essentially the same entry form as used in the Companies

Contact Management module of the system. (Read the chapter titled, Contacts, Members, vendors & Companies Feature in Detail to learn more about this form.) For user's convenience, a Company Record can be updated directly from this screen without accessing the Companies Contact Management through the main administration menu.

- **Opportunity Management Contacts Tab :**




An Opportunity can have one or more Contacts associated with it. Contacts can be added from the Opportunity Management Contacts Tab page by filling in the fields and clicking the 

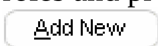
Add button. They are also added by other processes in the system. For example, when a related task is entered the assigned to person is added to this list.

**Role Entry Field and Column** - Each Contact is assigned a Role that they play in the Opportunity. Example values are "Decision Maker", "Support", "Customer Staff", "Primary Sales Rep", "Sales Team", etc. A Role can be of one of five types: "Customer", "Affiliate", "Reseller", "Sales Team", "Other". Role Types are a subset of Contact Types as used in the Contact Management Feature which integrates with Sales Management Feature.

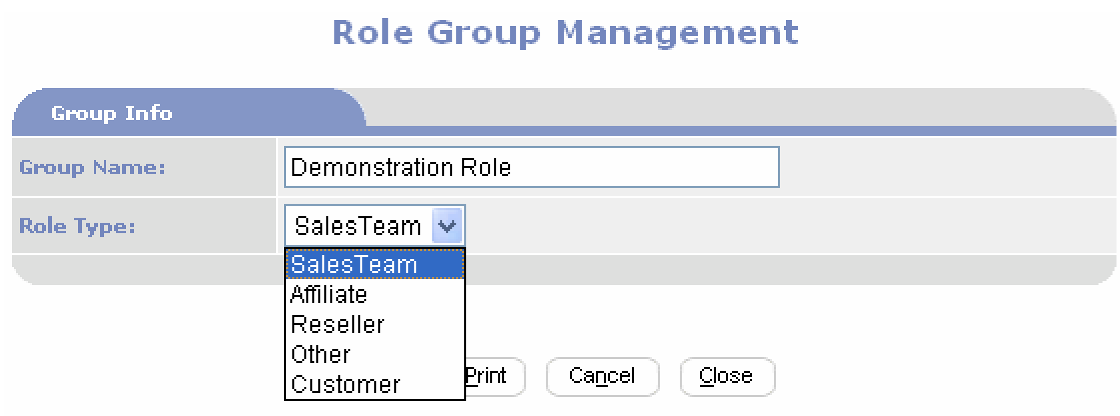
Only the "Sales Team" Role Type can be assigned access rights to Opportunity Management. Other Role Types cannot be assigned Opportunity Management access rights but they can be used to filter Contacts.

The site administrator can set up an unlimited number of Roles by clicking on Security edit icon 

located in the Site Management Menu of the site's Main Administration Menu page which activates the Groups page.


Clicking the Role Radio button to active refreshes the page to display all previously created roles and provides an opportunity to create a new role by clicking on the Add New 

button. The Role Group Management page is presented where the administrator can enter the name of the new role and select a Role Type from the Role Type selection list.




Generally, an '**Affiliate**' is a company or individual that is getting paid to refer business.. A **'Reseller'** is a *separate* company or individual that sells your products or services. The '**Sales Team**' are members of the sales staff, typically your employees.. A '**Customer**' is a contact who may purchase, i.e. a prospect or a contact that has purchased or any individual influencing the prospects purchase. The '**Other**' Role Type is used to designate all other individuals involved in the Opportunity such as an "Attorney", "Consultant", etc.

When a Contact is added from Contact Management, a Primary Salesperson and a Sales Team can be assigned to the Contact. All orders for that Contact are then assigned by default to the Contact's specified Primary Sales Rep and Sales Team. Note that these values may be overridden (changed) in Order Management. When an Opportunity is created it shall default the Primary Sales Rep and Sales Team. How this is done is described later on in the spec.

**Roles, Security and Privacy** - Each role may be assigned different access rights. The Sales Rep, Inside Sales Rep and Sales Manger may be assigned add and edit rights to all records for Sales Team except credit and commissions, with view only rights assigned to credit and commissions. The Finance Manger may be assigned view only rights to everything accept credit and commission, with add/edit rights assigned to credit and no access assigned to commissions. The Payroll Manger may be assigned view only rights to everything except credit and commission, with add/edit rights assigned to commissions and no access assigned to credit.

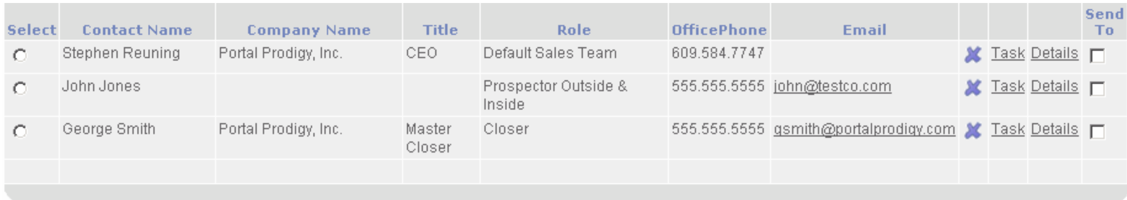
When using **Sales Teams and Roles**, sales staff should not be assigned to standard Security Groups that grant access rights to the sales related feature components such as Administration of Contacts, Administration of Companies, etc. Instead they should be assigned to Sales Teams and corresponding Roles. Doing this limits their rights to only those records assigned to them via Primary Sales Rep and Sales Team. When a Role has Edit rights to a Resource (feature component), the user may add new records. If they are assigned as a Primary Sales Rep or Role in a Sales Team that does not have access rights, they shall not be able to access the record once saved. This prevents Sales Reps and other staff from accessing records they do not have rights to access.

**Add New Contact to Opportunity Form -**

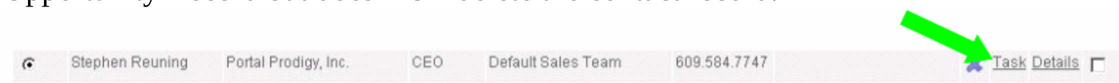

Contacts may be quickly added to the Opportunity Management record using the Add New Contact to Opportunity Form. Data defaults into the fields but can be quickly cleared by clicking on the Clear button.


Enter new contact's information and then click the Add button and the new contact is added to the list below after the *add a contact* routines are run. The add a contact


process uses the application's contact manager module to locate an existing contact record or add a new one to the website's database. . (Read the chapter titled, Contacts, Members, Vendors & Companies Feature in Detail to learn more about this routine.) Use the Quick Add button located at the bottom of the Search for Contacts page to skip the formal contact entry process.

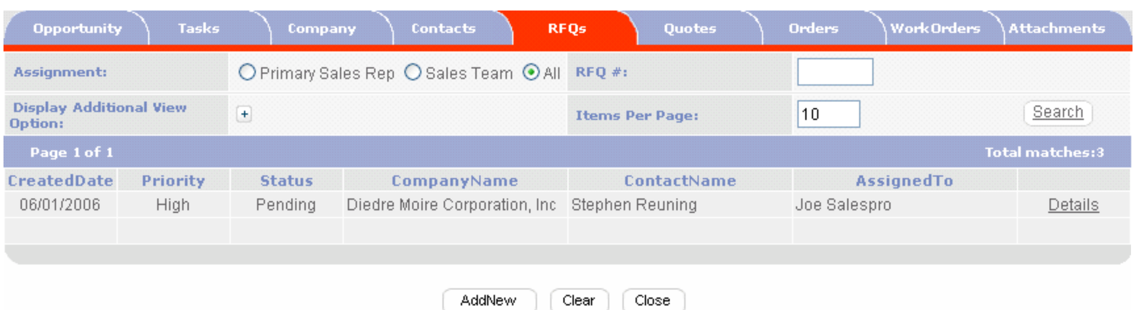



**Deleting Contact from Opportunity Record** – Highlighting the Select Column Select radio button and then clicking the delete icon deletes the contacts relationship to the Opportunity Record but does NOT delete the contact record.




**Task** Link – Clicking on the task link for a specific contact activates the Task Management page which displays all tasks active for that contact and allows for the addition of a task related to the activated opportunity assigned to the specific contact. (See Tasks Ticklers & Notes chapter of PortalProdigy Administrator's Manual for more details on task management.).

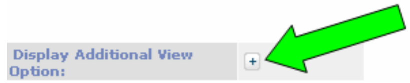
- **Opportunity Management RFQs Tab :**




Requests for Quotes (RFQ's) enter the system in many ways. One way to add an RFQ is to click the Add New button located at the bottom of the Opportunity Management RFQ page. Other ways include from the Request Management page and by visitors to the catalog or a Request for Quote link on the website. (See the chapter titled "Requests and Help Desk Feature in Detail in the Portal Prodigy Administrator's Manual.)

- **Assignment Search Criteria Entry Field: -** "Primary Sales Rep", "Sales Team", and "All" as radio buttons. Default to "Primary Sales Rep". Primary Sales Rep displays Opportunity records where logged user is the Primary Sales Rep. Sales Team displays Opportunity records where logged user is member of the Sales Team. All displays all Opportunities. Opportunities filtered by access rights.

- **RFQ #: Search Criteria Entry Field:**

- **Display Additional View Option:** - Clicking on the Opportunity RFQs Tab refreshes to the basic Opportunity RFQs Management page. Clicking on the + button expands available search criteria. 

Clicking on the – button reduces the available criteria.

  By entering desired filtering criteria and the clicking the 

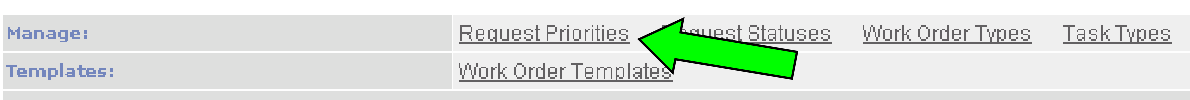
button, a result set of opportunities are displayed in the table below the search criteria input section.


- **Requestor Search Criteria Entry Field:** The Requestor is the customer making the request or the customer for whom the request was input. In other words, your employee Joe might put in a request for Acme Corporation but Joe is not the requestor. Instead, the requestor would be Joe's contact at Acme Corp.

- **Date Closed Search Criteria Entry Field:** Enter a date range to search for RFQ records closed within the entered range.

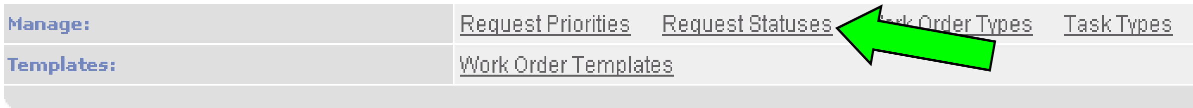
- **Priority Search Criteria Entry Field:** Displays a selection List that may be customized by administrator in Request Types management and accessed by clicking on the Features Menu Edit Icon 

located on the Site Management Menu of the site's Main Administration Menu. Then clicking on the Requests Link. Then click on RequestPriorities Link. Examples of Priority selections you might implement are High, Low, Standard.




- **Status Search Criteria Entry Field:** Displays a selection list that may be customized by administrator in Request Types management and accessed by clicking on the Features Menu Edit Icon 

located on the Site Management Menu of the site's Main Administration Menu. Then clicking on the Requests Link. Then click on RequestStatuses Link. Examples of Status selections you might implement are: Assigned, Pending, Priced, Sold.




- **Assigned to Group Search Criteria Entry Field:** Lists all Security Groups.

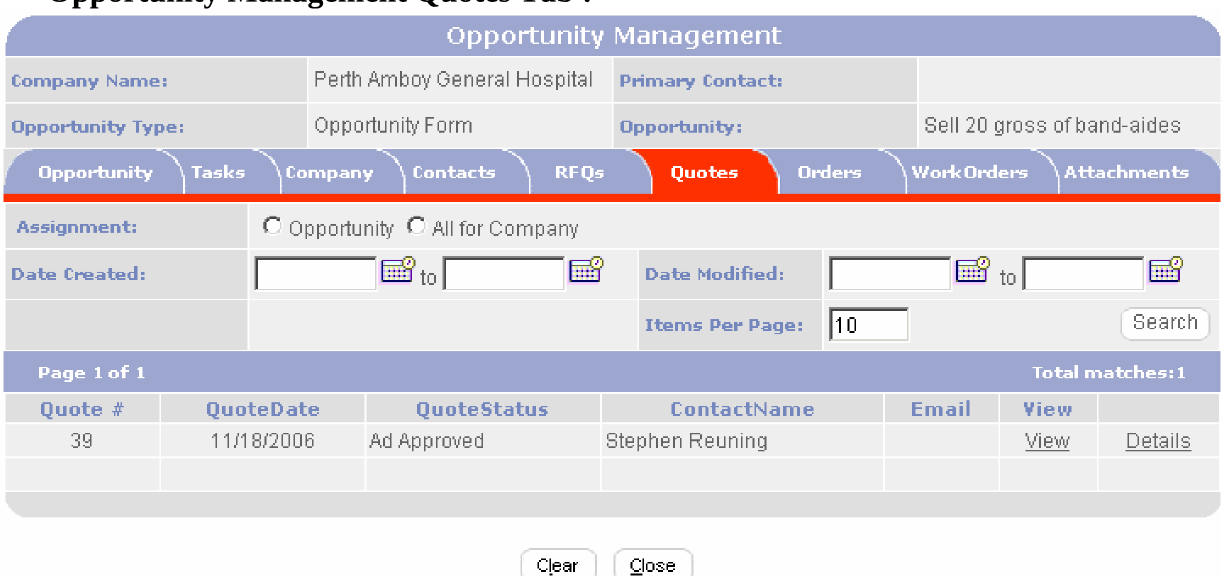
- **Assigned to Individual Search Criteria Entry Field:** lists all contacts of Contact Type = Employee.

- **Field and For Search Criteria Entry Field: -** PORTALPRODIGY allows for the creation of custom data gathering forms for an unlimited number of Request Types as needed for your organization. Your sales staff may wish to search for opportunities based on criteria collected into these custom fields. Therefore an option is provided to select from a list of custom fields located in the list at **Field:** All and the **For:** field is where the filtering criteria is entered. The fields selectable in the Field entry box is a compilation of all the questions created in the Form Builder of every Request Type where the Feature Component is set to "RFQ" or "RFQ from Cart".

- **Date Created Search Criteria Entry Field:** Date the RFQ was created.

- **Date Modified Search Criteria Entry Field:** Date the RFQ was last updated.

- **Opportunity Management Quotes Tab :**




Upon clicking Search [Search] button this view displays a list of any quotes related to the specifically activated opportunity. Quotes are a Type of Order and can be created from the Main Administration Menu (Ctrl-Alt-m) and then selecting the Orders Add [+] button on the Orders **Orders** row of the Transaction Management Menu. Only orders with the

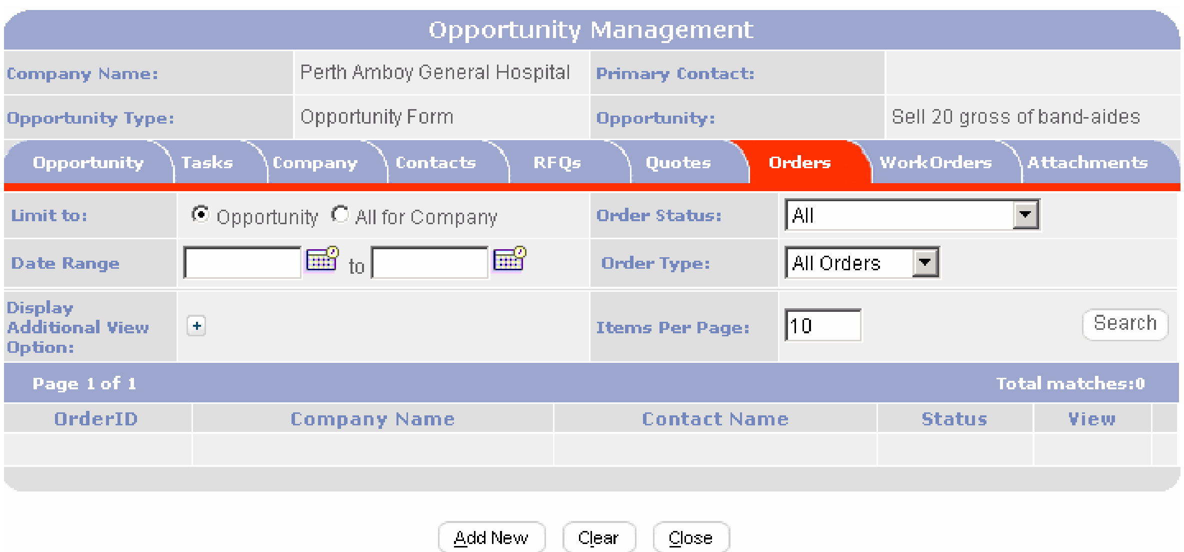
Order Type equal to "Quote" are reported on the Quotes list on the Opportunity Management page.

- **Assignment Search Criteria Entry Field: -** "Opportunity and "All for Company" as radio buttons. Selecting Opportunity displays only quotes related to the specifically activated opportunity. Selecting All for Company displays all quotes records related to the company.

- **Date Created Search Criteria Entry Field:** Enter a date range to search for quote records created within the entered range.

- **Date Modified Search Criteria Entry Field:** Enter a date range to search for quote records that were modified within the entered range.

- **Opportunity Management Orders Tab:** Search and displays list of Customer Orders.




Upon clicking Search button this view displays a list of any orders related to the specifically activated opportunity. Orders and can be created from the Main Administration Menu (Ctrl-Alt-m) and then selecting the Orders Add button on the Orders row of the Transaction Management Menu or by clicking th Add New button located at the bottom of the Opportunity Management Orders page.

- **Limit to Search Criteria Entry Field:** "Opportunity and "All for Company" as radio buttons. Selecting Opportunity displays only orders related to the specifically activated opportunity. Selecting All for Company displays all order records related to the company.

- **Order Status Search Criteria Entry Field:** Select "Shopping Cart", "Checkout", "Pending", "Partially Fulfilled", "Fulfilled", "Completed", "Canceled", "OnHold", "OnHold Submitted", "OnHold Pending", and "OnHold Partially Fulfilled". Unlike many of the selection lists used in PORTALPRODIGY, the order status selections are hard coded and may not be customized because the selections are used by the logic of certain business processes preprogrammed into the application. (Learn more in the "Order Management" section of this manual.)

- **Date Range Search Criteria Entry Field:** The Order Date Range field is not an auto-fill field like date created or date modified. It is a manually entered field provided for situations where it is important to document the origination date of an order that may have been during a meeting, phone call, weekend golf outing, etc. and prompt entry into the system was not convenient. Enter a date range to search for order records within the entered range.

- **Order Type Search Criteria Entry Field:** Select "All Orders", "Order", "Quote", "Recurring", "Return", "Credit Memo", or "Back Order". Unlike many of the selection lists used in PORTALPRODIGY, the order type selections are hard coded and may not be customized because the selections are used by the logic of certain business processes preprogrammed into the application. (Learn more in the "Order Management" section of this manual.)

- **Display Additional View Option:** - Clicking on the Opportunity Tasks Tab refreshes to the basic Opportunity Tasks Management page. Clicking on the + button expands available search criteria. 

Clicking on the – button reduces the available criteria.

  By entering desired filtering criteria and the clicking the 

button, a result set of opportunities are displayed in the table below the search criteria input section.

- **Feature Search Criteria Entry Field:** Select "All", "Events", "Ads", "Products", "Press Release", "Membership", "Exchanges", "Donations" or "Requests". Unlike many of the selection lists used in PORTALPRODIGY, the feature selections are hard coded and may not be customized because the selections are used by the logic of certain business processes preprogrammed into the application. (Learn more in the "Order Management" section of this manual.)

- **Order ID Range Search Criteria Entry Field:** Enter the Order ID Number range (Order Numbers) to search for a specific range of orders.

- **Payment Entry Date Range Search Criteria Entry Field:** Enter a date range to search for orders which received payments within the entered range.

- **Contact ID Search Criteria Entry Field:** Enter Contact ID Number to search for a contact's order records.

- **Last Name Search Criteria Entry Field:** Enter text criteria to search for order records assigned to a specific last name.

- **First Name Search Criteria Entry Field:** Enter text criteria to search for order records assigned to a specific first name.

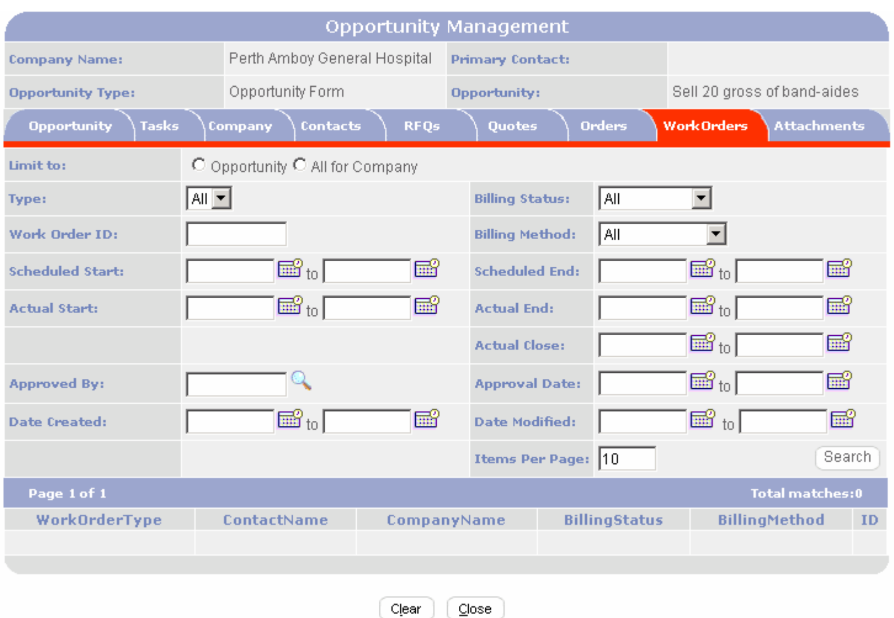
- **Date Created Search Criteria Entry Field:** Enter a date range to search for order records created within the entered range.

- **Date Modified Search Criteria Entry Field:** Enter a date range to search for order records modified within the entered range.

- **Item ID Search Criteria Entry Field:** Enter an Item ID to search for orders related to a specific item. Item ID numbers are automatically assigned as unique identification numbers when item/products are entered into Items Management. These are typically products listed in the website's catalog.

- **Financial Status Search Criteria Entry Field:** Select "Pending", "Approved or "Declined" to filter orders based on Financial Status. Unlike many of the selection lists used in PORTALPRODIGY, the financial status selections are hard coded and may not be customized because the selections are used by the logic of certain business processes preprogrammed into the application.

- **Opportunity Management Work Orders Tab :**

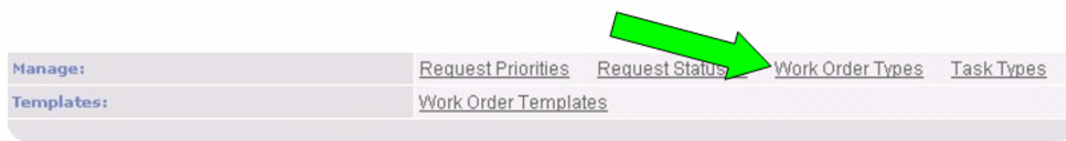


Work Orders are used to estimate, submit, approve, track, bill and collect billable services. (See Request and Help Desk Features in Detail chapter of PortalProdigy Administrator's Manual for more details on work orders.)

- **Limit to Search Criteria Entry Field:** "Opportunity and "All for Company" as radio buttons. Selecting Opportunity displays only work orders related to the specifically activated opportunity. Selecting All for Company displays all work order records related to the company.

- **Type Search Criteria Entry Field:** Displays a selection List that may be customized by administrator in Work Order Types Management and accessed by clicking on the Features Menu Edit Icon 

located on the Site Management Menu of the site's Main Administration Menu. Then clicking on the Requests Link. Then click on Work Order Types Link. Examples of Work Order Types selections you might implement are Per Incident Service Request, Website Customization, etc.




- **Billing Status Search Criteria Entry Field:** Select "Non Billable", "Internal", "Estimate", "Billable". Unlike many of the selection lists used in PORTALPRODIGY, the order status selections are hard coded and may not be customized because the selections are used by the logic of certain business processes preprogrammed into the application. (Learn more in the "Request and Help Desk Features in Detail" section of this manual.)

- **Work Order ID Search Criteria Entry Field:**

- **Billing Method Search Criteria Entry Field:** Select "Pre-Payment", "Pre-Authorized", "Retainer", or "Invoice". Unlike many of the selection lists used in PORTALPRODIGY, the billing method selections are hard coded and may not be customized because the selections are used by the logic of certain business processes preprogrammed into the application. (Learn more in the "Request and Help Desk Features in Detail" section of this manual.)

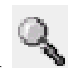
- **Scheduled Start Search Criteria Entry Field:** Enter a date range to search for work orders scheduled to start within the entered range.

- **Scheduled End Search Criteria Entry Field:** Enter a date range to search for work orders scheduled to end within the entered range.

- **Actual Start Search Criteria Entry Field:** Enter a date range to search for work orders that started within the entered range.

- **Actual End Search Criteria Entry Field:** Enter a date range to search for work orders that ended within the entered range.

- **Actual Close Search Criteria Entry Field:** Enter a date range to search for work orders that were closed within the entered range.

- **Approved By Search Criteria Entry Field: -** Enter a name and click the search  icon to activate the contact search interface. The Contact Record should be located and selected. NOTE: Look ups from this field are filtered for Work Order Records related to the activated opportunity.

- **Approval Date Search Criteria Entry Field:** Enter a date range to search for work orders approved within the entered range.

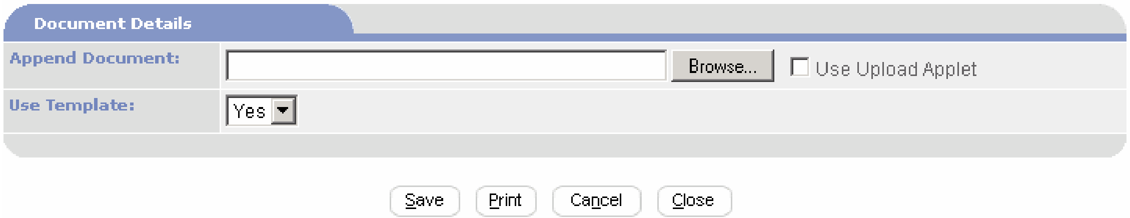
- **Date Created Search Criteria Entry Field:** Enter a date range to search for work orders created within the entered range.

- **Date Modified Search Criteria Entry Field:** Enter a date range to search for work orders modified within the entered range.

- **Opportunity Management Attachments Tab :**


The Opportunity Management Attachments Tab page provides the user with the ability to add and view attachments related to the sales opportunity. This includes all formats of digital files such as Microsoft Word documents, Images, PDFs, etc. It uses the Resource Document Library module of the PortalProdigy application. (See the chapter titled Document Resource Library in Detail of the Administrator's Manual to learn more about digital documents and document management.)

- **Adding an Attachment** – Click the Add New  button at the bottom of the Opportunity Management Attachments page and the Document Upload dialog will open.




If you want the document to open in a separate window without being bordered by you site template set Use Template to *No*; otherwise, leave as *Yes*.

Click on the 

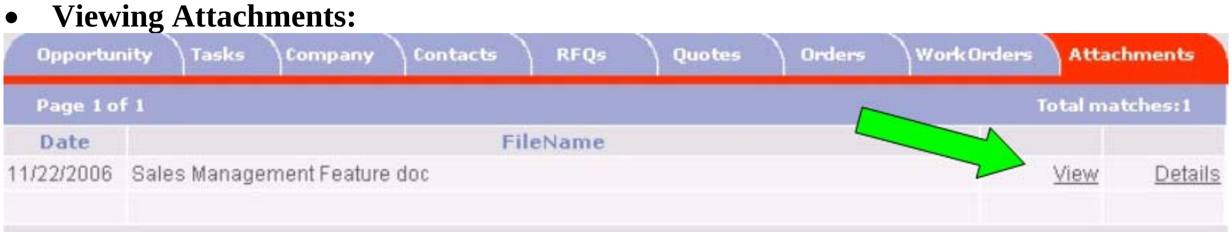
button to locate and select the appropriate document (file) that is stored on your system.

The first time you upload a document from a computer using PORTALPRODIGY, you will be prompted to install an Active-X component. PORTALPRODIGY uses this component to efficiently and reliably load documents via the HTML protocol. If this sounds entirely too technical, just answer "Yes" and leave it at that. This is a one time install per computer. You will not be prompted to do this again unless you change your computer configuration.

**Upload Prompt:** Click Ok to confirm upload. If you are uploading an HTML document, PORTALPRODIGY knows to also upload the HTML documents subfolder. The HTML subfolder is where images, scripts, style sheets and any other files required to support the HTML document are stored. The subfolder must follow the standard web page subfolder naming convention, which appends _files to the htm files name, e.g. the subfolder for *LearnAboutUs.htm* must be named *LearnAboutUs_files* .


The path and file name are then displayed in the Append Document text box.

- **Viewing Attachments:**

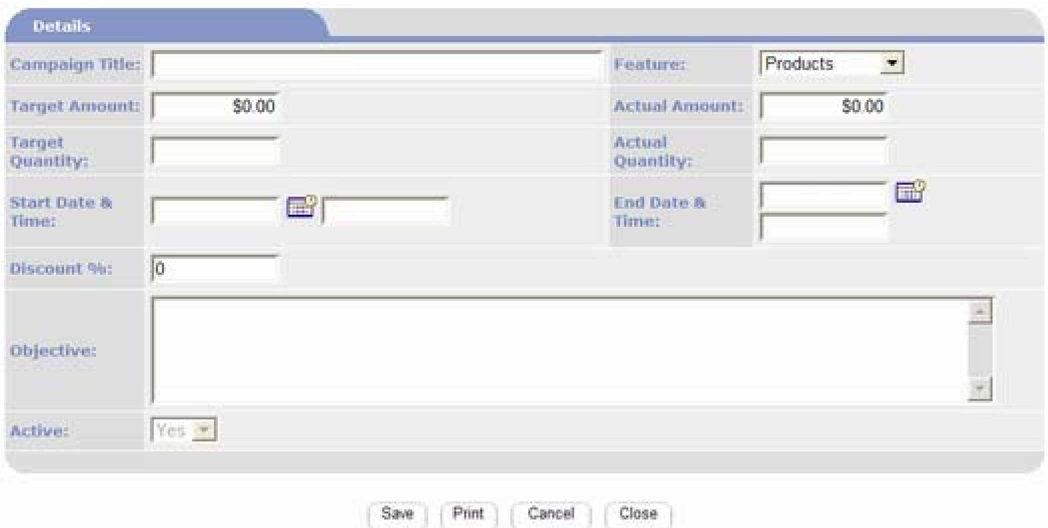



Click on the **View** link to display the document a document. Click on the **Details** link to view or update the document's properties in the Document Library.

- **Primary Contact Field**: An Opportunity can have one or more Contacts associated with it. Contacts are added using the Opportunity Management PageContacts tab and the relationship is reported in the Contacts Opportunity Management page table.

## 1.3.3 Campaign Management

Used to create and maintain campaigns. This option is accessed from the Search for Promotion Codes page. (Read the chapter titled Promotion Codes Features in Detail of the Administrator's Manual to learn more about managing promotions and campaigns using PortalProdigy.




- **Campaign Title** – used to enter a name for the campaign.
- **Feature** – used to select the feature component the campaign applies to.
- **Target Amount** – used to enter a target dollar amount the campaign is intended to produce.
- **Actual Amount** – used to enter the actual dollar amount the campaigned produced.
- **Target Quantity** – used to enter a target quantity the campaign is intended to produce. E.g. for a membership drive this would be the number of new memberships the campaign is targeted to produce.
- **Actual Quantity** – used to enter the actual quantity the campaign produced.
- **Start Date** – used to enter the date the campaign starts.
- **Start Time** – used to enter the time of day the campaign starts.
- **End Date** – used to enter the date the campaign ends.
- **End Time** – used to enter the time of day the campaign ends.

- **Discount %** - used to enter the default percentage discount that will be offered for product promotions.
- **Objective** – used to enter a narrative description of the campaign.
- **Active** – The Active Field can be set to Yes or No. When set to No, the record will no longer be displayed on the visitor (public) portion of the website. It also will be excluded from search results on administrative pages unless the Include deactivated records in search results box is checked. It does not delete the record but tags the record so it will be filtered from display.

| | |
|---|---|
| Save | Saves the data and continue working on the page. |
| Delete | Deletes the current record. PORTALPRODIGY will prompt to confirm deletion of the record. Select OK to confirm the deletion or CANCEL to abort the deletion. |
| Print | Prints the website page to the user's local printer. |
| Cancel | Close the page and discard all entries and edits. |
| Close | Used to close the page. PORTALPRODIGY will prompt to save changes. OK response saves changes, closes page, and returns to previous page. CANCEL response discards all entries and edits (same as Cancel button). |

## 1.4 Feature Administration

Before you begin using PortalProdigy to manage your sales operations the following feature modules need to be set up:

- Set Up Sales Roles
- Set Up Sales and Opportunity Features
- Set Up Request Features and Create Opportunity Form
- Set Up Sales Contacts Records
- Set Up Items, Product & Inventory
- Set Up Task Features

## 1.4.1 Set-Up Roles

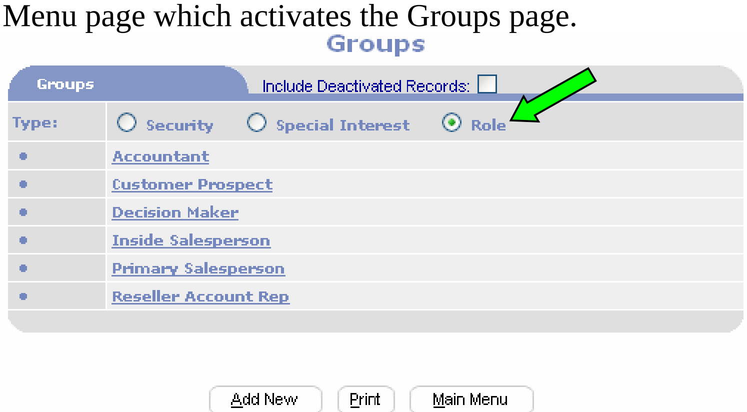
Each member of your sales team can be assigned “Roles” that they play in the sales process. Example roles are “Decision Maker”, “Support”, “Customer Staff”, “Primary Sales Rep”, “Sales Team”, etc. Roles are customizable and you may add as many as you like.

A Role can be one of five hard coded (not customizable) Role Types: “Customer”, “Affiliate”, “Reseller”, “Sales Team”, “Other”. Role Types are a subset of Contact Types as used in the Contact Management Feature which integrates with Sales Management Feature.

Only the “Sales Team” Role Type can be assigned access rights to Opportunity Management. Other Role Types cannot be assigned Opportunity Management access rights but they can be used to filter Contacts.

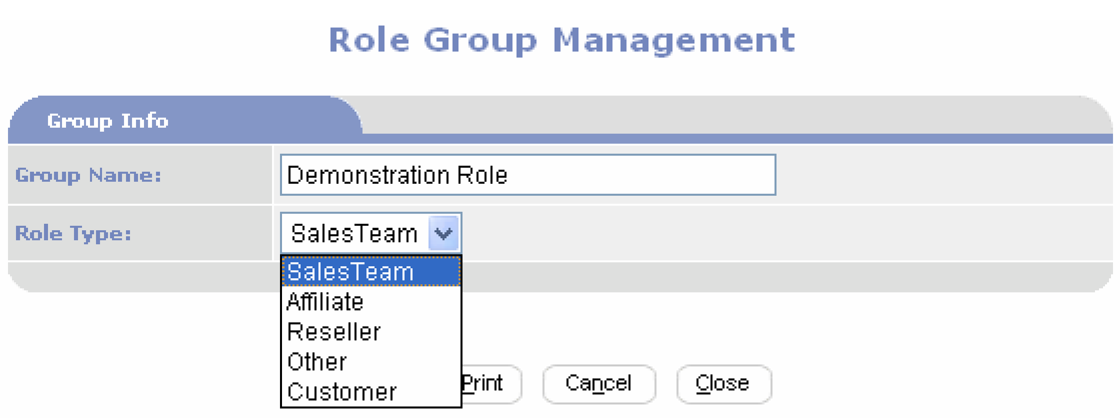
The site administrator can set up an unlimited number of Roles by clicking on Security edit icon


located in the Site Management Menu of the site’s Main Administration Menu page which activates the Groups page.

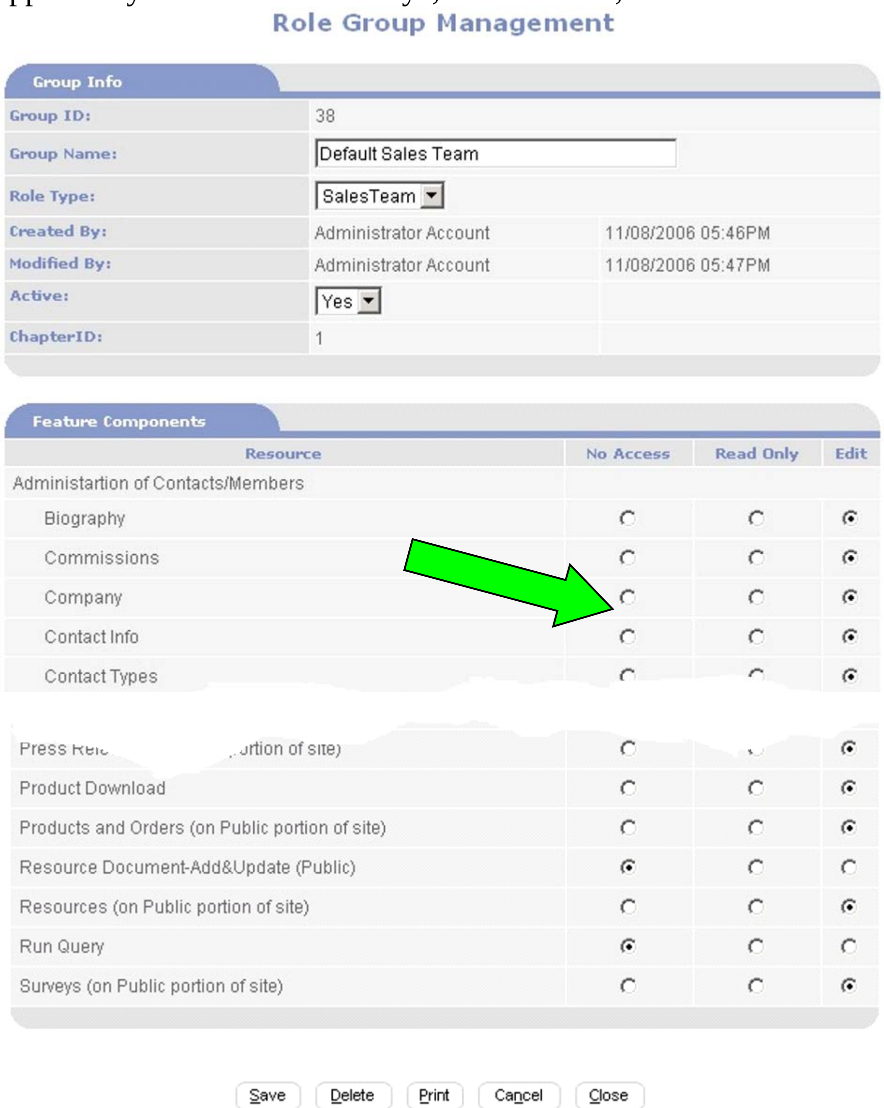



Clicking the Role Radio button to active refreshes the page to display all previously created roles and provides an opportunity to create a new role by clicking on the Add New


button. The Role Group Management page is presented where the administrator can enter the name of the new role and select a Role Type from the Role Type selection list.



Generally, an ‘Affiliate’ is a company or individual that is getting paid to refer business. A ‘Reseller’ is a *separate* company or individual that sells your products or services. The ‘Sales Team’ are members of the sales staff, typically your employees. A ‘Customer’ is a contact who may purchase, i.e. a prospect or a contact that has purchased or any individual influencing the prospects purchase. The ‘Other’ Role Type is used to designate all other individuals involved in the Opportunity such as an “Attorney”, “Consultant”, etc.




**Roles, Security and Privacy** - Each Sales Team role, and only Sales Team roles, may be assigned different access rights. The Sales Rep, Inside Sales Rep and Sales Manger may be assigned add and edit rights to all records for Sales Team except credit and commissions, with view only rights assigned to credit and commissions. The Finance Manger may be assigned view only rights to everything accept credit and commission, with add/edit rights assigned to credit and no access assigned to commissions. The Payroll Manger may be assigned view only rights to everything except credit and commission, with add/edit rights assigned to commissions and no access assigned to credit.

When using **Sales Teams and Roles**, sales staff should not be assigned to standard Security Groups that grant access rights to the sales related feature components such as Administration of Contacts, Administration of Companies, etc. Instead they should be assigned to Sales Teams and corresponding Roles. Doing this limits their rights to only those records assigned to them via Primary Sales Rep and Sales Team. When a Role has Edit rights to a Resource (feature component), the user may add new records. If they are assigned as a Primary Sales Rep or Role in a Sales Team that does not have access rights, they shall not be able to access the record once saved. This prevents Sales Reps and other staff from accessing records they do not have rights to access.

**Client & Customer Roles**

You may wish to set up Client and Customer Roles such as Client Bookkeeper, Client Staff, and Client Primary Contact. When you create these roles select Client as the Role type.

**Affiliate Roles**

You may wish to set up Affiliate Roles such as Affiliate Staff, Affiliate Manager, Affiliate Bookkeeper. When you create these roles select Affiliate as the Role type.

**Reseller Roles**

You may wish to set up Client and Customer Roles such as Reseller Bookkeeper, Reseller Staff, and Reseller Management. When you create these roles select Reseller as the Role type.

## 1.4.2 Set-Up Sales and Opportunity Features

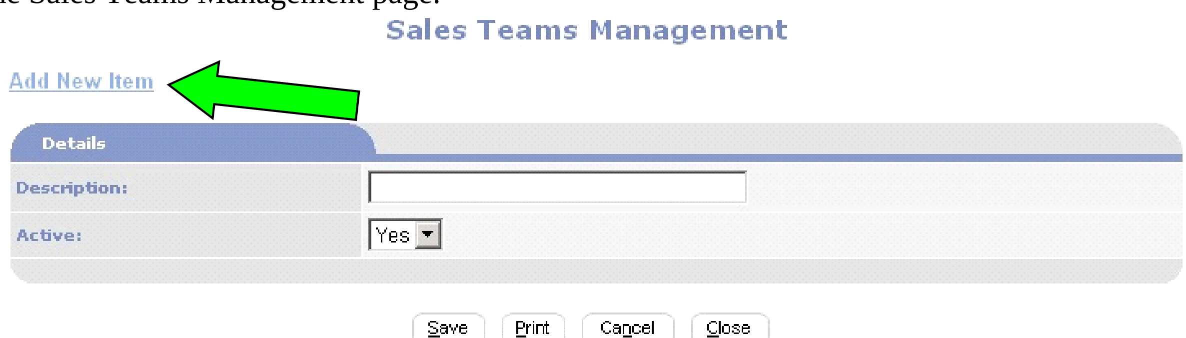
From the Main Site Administration Menu (Ctrl-Alt-M) click on the Features 

Edit Icon located in the Site Management Menu Column. Check the Sales & Opportunity 

check box and then click on the **Sales & Opportunity** link.

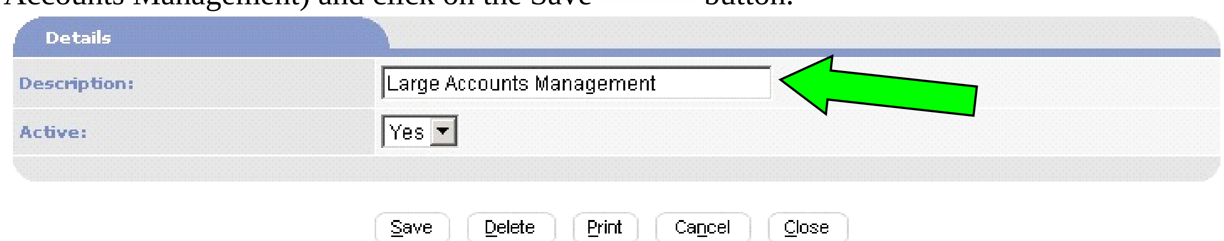

### Create Sales Teams

Click on the **Sales Teams** link of the Sales & Opportunity Features Management page to access the Sales Teams Management page.




Click on the **Add New Item** link to add a Sales Team. Enter a Description (For example, Large Accounts Management) and click on the Save  button.



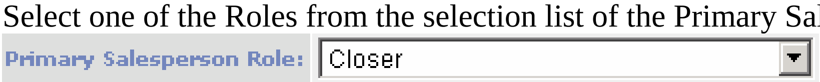



Continue process until you've added all the sales teams required.


**Select Default Sales Team**


Select one of the Sales Teams in the Default Sales Team field. The default sales team will auto-fill into newly created Opportunity records. Select   if you do not want the Sales Team field to auto-fill.

**Select Primary Salesperson Role**

Select one of the Roles from the selection list of the Primary Salesperson Role   field. The value selected for the Primary Salesperson Role will auto-fill as the Role of any primary salesperson contact added to a sales opportunity record.

**Select Primary Contact Role**

Select one of the Roles from the selection list of the Primary Contact Role   field. The value selected for the Primary Contact Role will auto-fill as the Role of any primary contact added to a sales opportunity record.

**Select Primary Reseller Contact Role**

Select one of the Roles from the selection list of the Reseller Contact Role   field. The value selected for the Reseller Contact Role will auto-fill as the Role of any reseller contact added to a sales opportunity record.

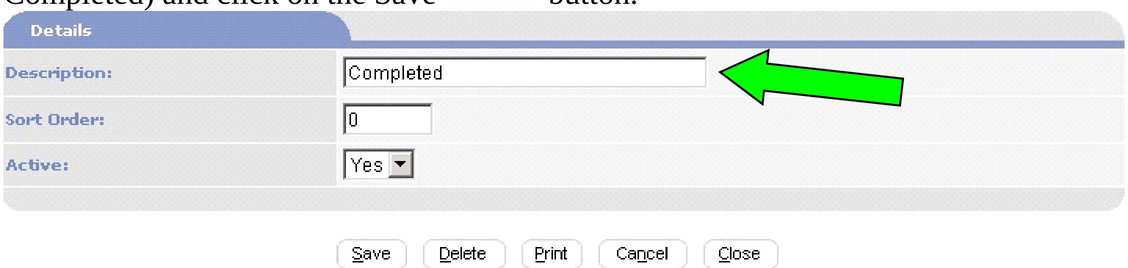
### Select Primary Affiliate Contact Role

Select one of the Roles from the selection list of the Affiliate Contact Role **Affiliate Contact Role:** Affiliate Manager field. The value selected for the Affiliate Contact Role will auto-fill as the Role of any reseller contact added to a sales opportunity record.

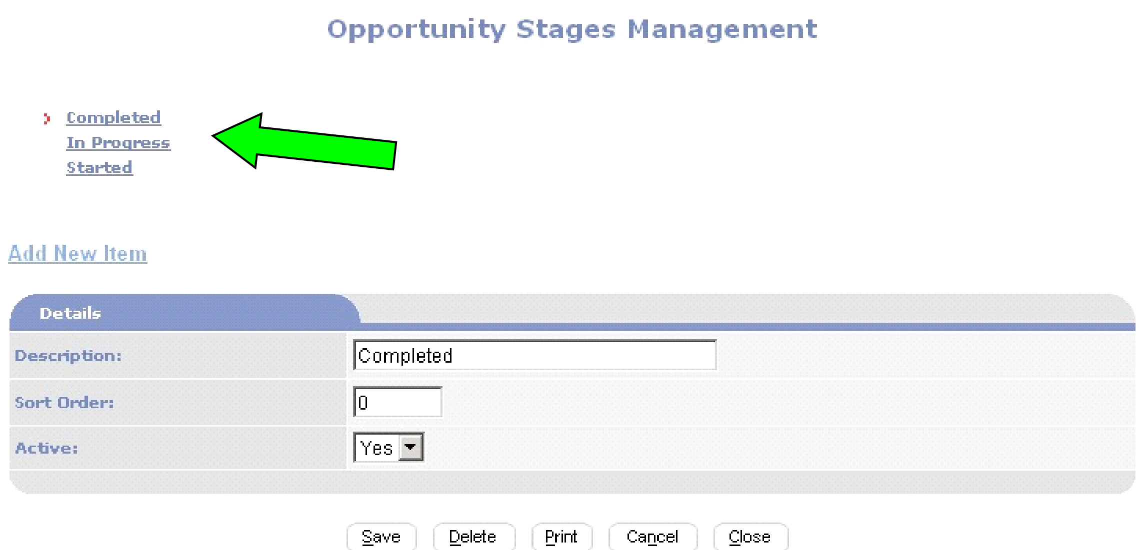
### Create Opportunity Stages

Click on the **Opportunity Stages** link of the Sales & Opportunity Features Management page to access the Opportunity Stages Management page.


Click on the **Add New Item** link to add an Opportunity Stage. Enter a Description (For example, Completed) and click on the Save Save button.




Continue process until you've added all the Opportunity Stages required.

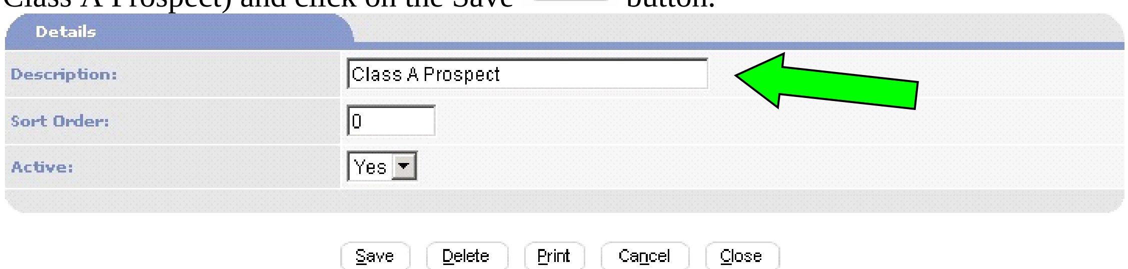



### Create Opportunity Ratings

Click on the **Opportunity Rating** link of the Sales & Opportunity Features Management page to access the Opportunity Rating Management page.


Click on the **Add New Item** link to add an Opportunity Rating. Enter a Description (For example, Class A Prospect) and click on the Save 

button.

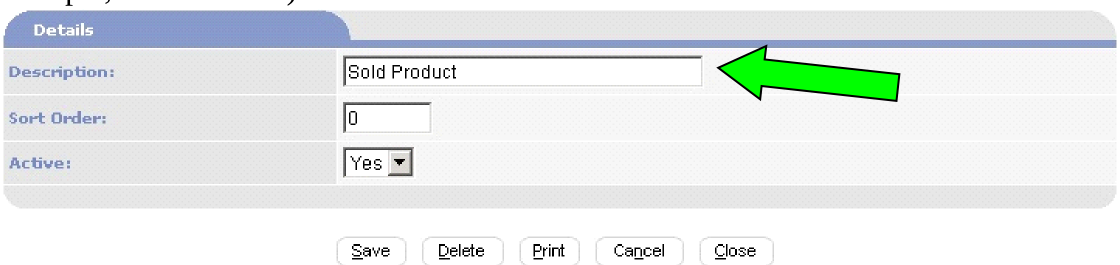



Continue process until you've added all the Opportunity Ratings required.

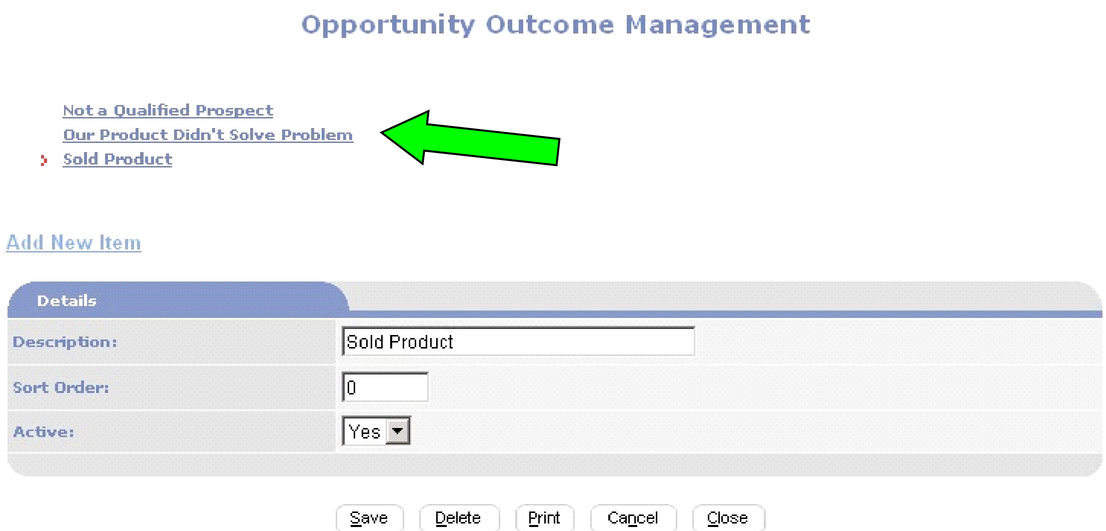

## Create Opportunity Outcomes

Click on the **Opportunity Outcome** link of the Sales & Opportunity Features Management page to access the Opportunity Outcome Management page.


Click on the **Add New Item** link to add an Opportunity Outcome. Enter a Description (For example, Sold Product) and click on the Save [Save] button.



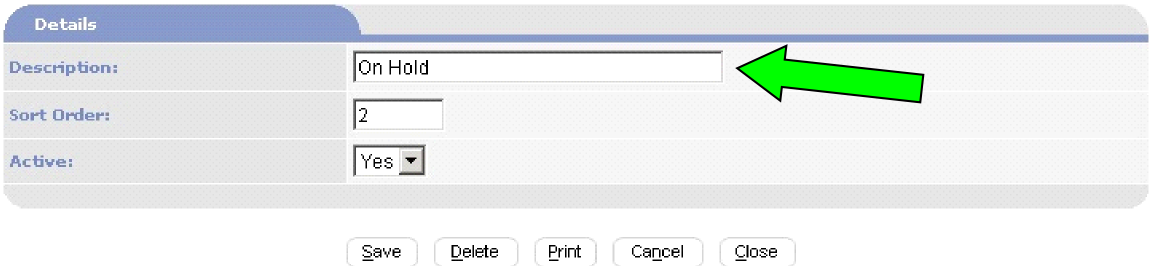

Continue process until you've added all the Opportunity Outcomes required.



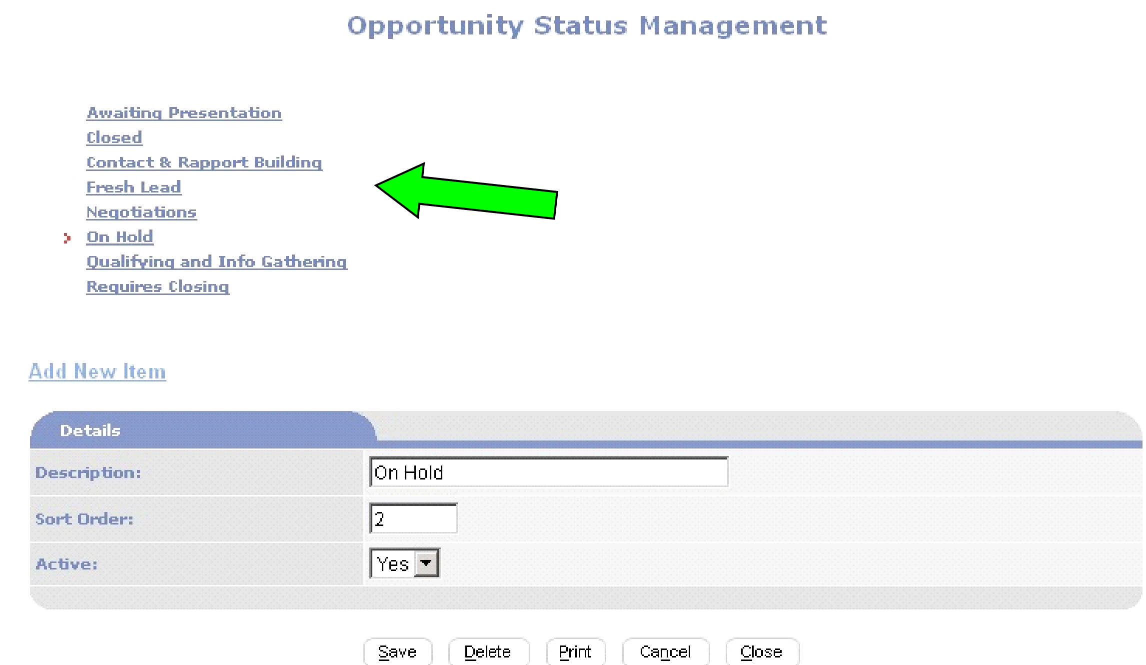

### Create Opportunity Statuses

Click on the **Opportunity Status** link of the Sales & Opportunity Features Management page to access the Opportunity Status Management page.

Click on the **Add New Item** link to add an Opportunity Staus. Enter a Description (For example, On Hold) and click on the Save  button.




Continue process until you've added all the Opportunity Statuses required.

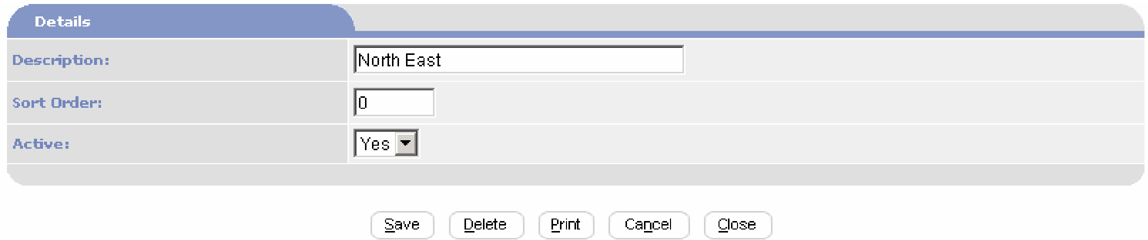



**Create Territories**

Click on the **Territories** link of the Sales & Opportunity Features Management page to access the Territories Management page.

Click on the **Add New Item** link to add a Territory. Enter a Description (For example, North East) and click on the Save 

button.




Continue process until you've added all the territories teams required.


## 1.4.3 Setup Request Features and Create Opportunity Form(s)

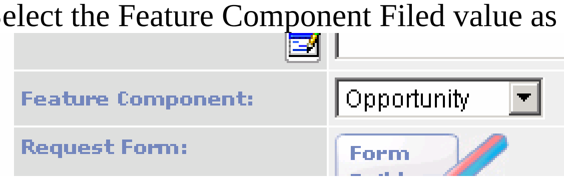
The Sales & Opportunity feature component utilizes Request Types to define Opportunity forms which are managed directly using Opportunity Management rather than Request Management. Review the chapter titled Requests and Help Desk Features in Detail to gain a comprehensive understanding of Request Type Management.

To create a an Opportunity Form, go to the Main Administration Menu (Ctrl-Alt-m) and click on the Requests Types 

Add  Icon located in the Content Management menu column.

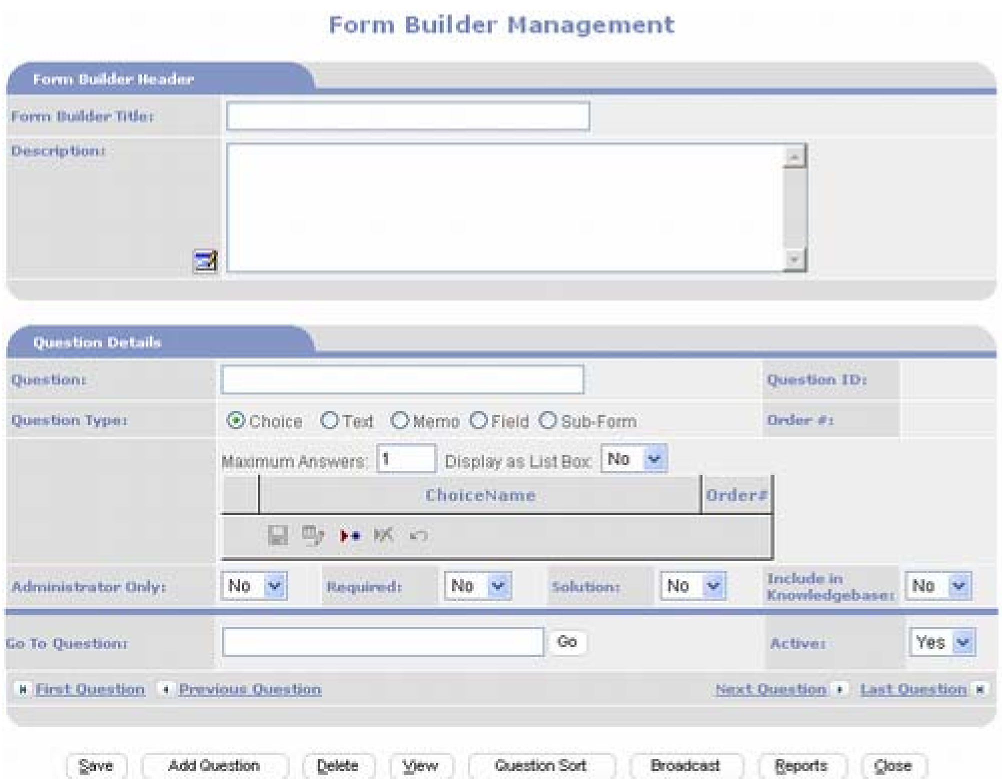
Enter a Type description such as “Opportunity Form”.


Select the Feature Component Filed value as “Opportunity”




Click on the Form Builder 

button to create the opportunity information gathering form.



Enter a name for your form (Suggested that you use same name as Request Type. I.e. Opportunity Form) into Form Builder Title field. Note that his name is not displayed on the form.

For each input field (question on your form) you will need to complete the Question Details section as follows:

Enter a label name in the Question field. This is the label that you want displayed on the form.

Select a Question Type.

For Question Type "Choice" add each choice as a row in the grid. Click on the Add New Record icon to add a Choice. Click Save Current Record icon when finished entering the Choice. Use the Order # field to control the order that the choices are listed. If you want to display the Choices as checkboxes set Maximum Answers to a number greater than 1; otherwise they will be displayed as radio button choices. You may alternatively display them in a list box by setting Display as List Box to "Yes".

For Question Type = "Text" select a Data Format for the response.

For Question Type = "Memo" there are no additional options.

For Question Type = "Field" select a field from the list box.

For Question Type = "Sub-Form" click on the link Create Subform to open Sub-Form Builder. For each column that you want in your sub-form repeat the same steps as adding Questions in your main form. Sub-Form Builder contains one additional field Width. Use this field to control the width of the column. This will not affect the length of the entries into the fields, but it will limit how much visible at a time. When finished defining your Sub-Form close and save Sub-Form Builder. Set Default # of Rows to the number of data entry rows you want visible when the user is in Request Entry. The user will be presented with a button to add additional rows.

Set Administrator Only list box to "No".

Set Required list box to "Yes" if you want to require an answer to the question; otherwise leave it set to "No".

Set Solution list box to "No"

Set Include in Knowledgebase to "No".

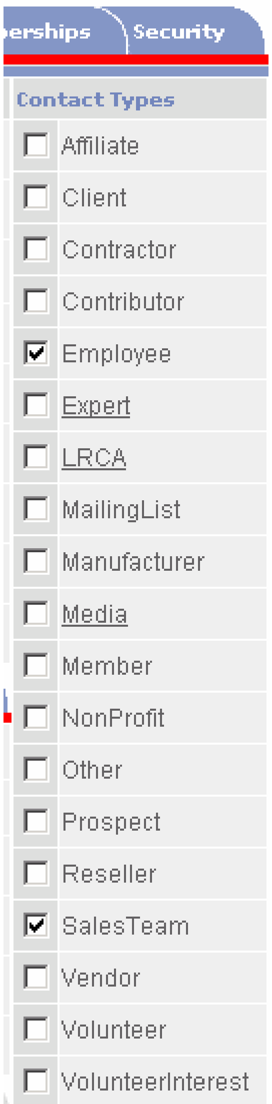
Click Save.

If you want to add another question click Add Question; otherwise click Close.

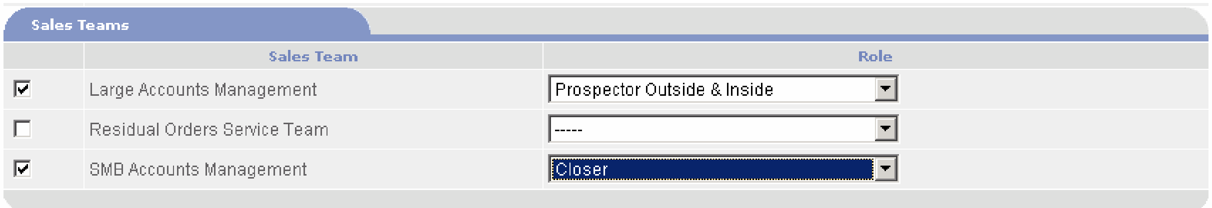
### 1.4.4 Set Up Sales Contacts Records

Set up contact records for each of your Staff and any other members of your sales team including Affiliates and Resellers. Review the chapter titled Contacts, Members, Vendors & Companies Feature in Detail.

Be sure to select the correct Contact Type Check Boxes: Employee, Sales Team, Reseller and Affiliate as appropriate. The application will use these to make logical business process decisions once you begin using the system so be sure to check them correctly.




Click on each Sales Team contact's Security tab and select appropriate roles.




Save the records.

## 1.4.5 Set Up Items, Product & Inventory

Before making your site available to Visitors for Shopping, you must perform the following:

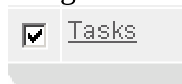
- Configure GL Features defining GL Account Types and GL Accounts
- Configure Order Features
- Define Credit Terms
- Configure Sales Tax
- Define Shipping Carriers, Methods, & Fees
- Configure Product & Inventory Features
- Define Product Unit Types
- Define Product categorizations including:
    - Product Brands
    - Product Classifications
    - Product Types
    - Detail Categories
- Create Contact Company records for Vendors and Manufacturers
- Configure Payment Features
- Create Item record for each Product
- Enter Initial Inventory quantities if using Inventory Control features.
- Define Shopping Catalog Product Categories
- Assign Products to Shopping Catalog Product Categories

Sales Opportunity records can be generated by website visitor inquiries or by internal Sales Team members working from the Administration portion (back office) of the website. In either case, it is likely that you will wish to reference specific products you sell or have in inventory. Follow the procedures in the chapter titled Items/Product Catalog Feature in Detail of the PortalProdigy Administration Manual.

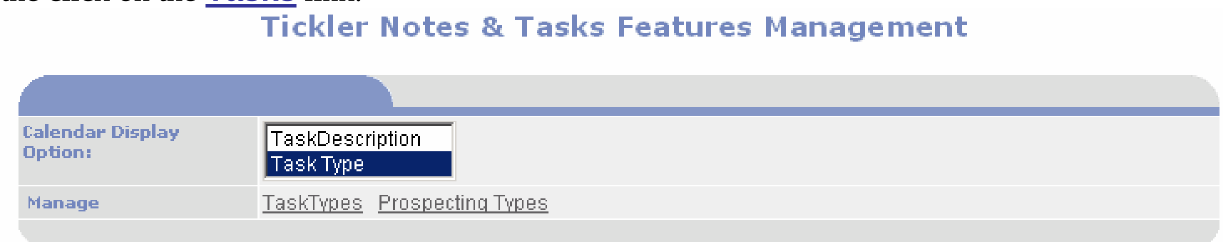
## 1.4.6 Task Features

Tasks are used to assign work to different individuals and provide a history of progress. Tasks can be manually created from Administrative Request Entry, Request Administration, and Tickler Notes. Tasks can also be automatically created when new Requests are entered. Creating Tasks involves selecting a Task Type from a list box, entering an additional description in a memo field and optionally assigning the Task to a group or individual.

The Administrator should set up "Opportunity" Feature Task Types before the Sales Team begins using the PortalProdigy Sales Management system. To add Task Types click on the Features 

Edit Icon located in the Site Management menu column of the sites Main Administration Menu (Ctrl-Alt-m). Check the Tasks 

activation check box and the click on the **Tasks** link.

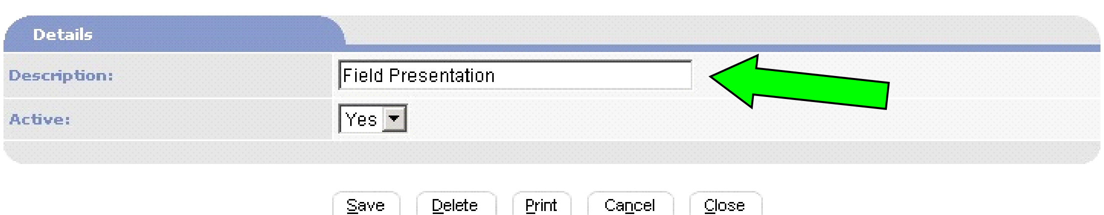



**Create Prospecting Types**

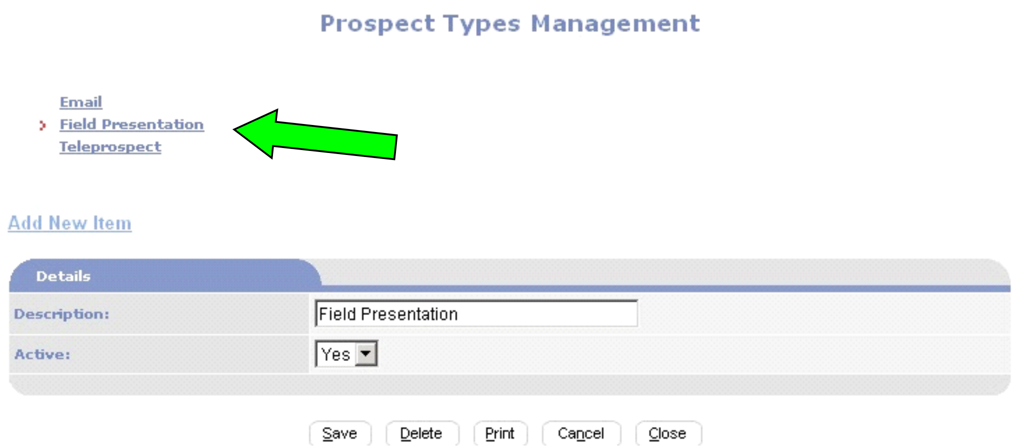
Click on the **Prospecting Types** link of the Tickler Notes & Tasks Features Management page to access the Prospecting Types Management page.


Click on the **Add New Item** link to add a Prospecting type. Enter a Description (For example, Field Presentation) and click on the Save 

button.




Continue process until you've added all the Prospecting Types required.

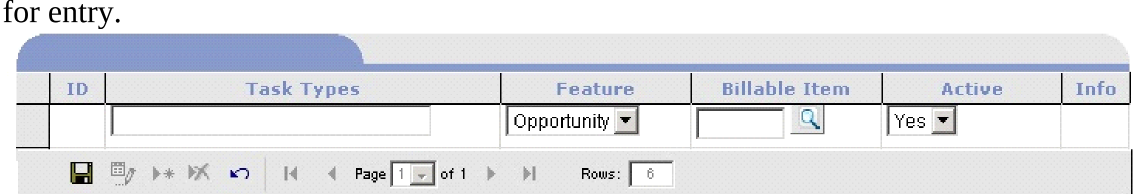



## Create Task Types

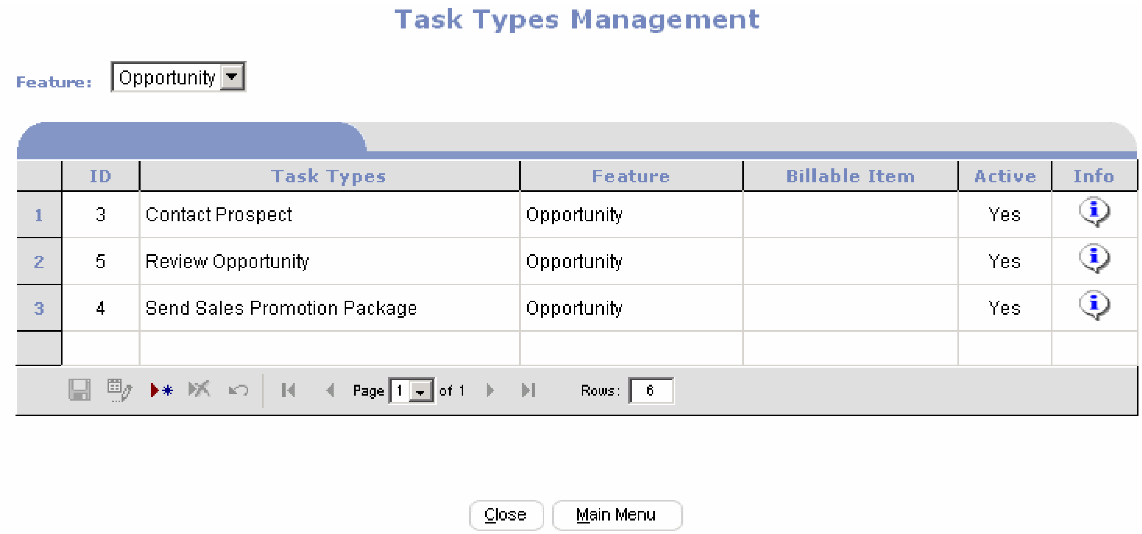
Click on the **Task Types** link of the Tickler Notes & Tasks Features Management page to access the Task Types Management page.


Select Opportunity 

as the Feature before adding any task types for the Sales Opportunity Management system. Then Click on the Add a Task Type  button to prepare the row for entry.




Enter the Task Type name and then click on the Save  button. Repeat until all Task Types have been created.


Task Types Management
Feature: Opportunity
ID
Task Types
Feature
Billable Item
Active
Info
1 3 Contact Prospect Opportunity Yes
2 5 Review Opportunity Opportunity Yes
3 4 Send Sales Promotion Package Opportunity Yes
Page 1 of 1
Rows: 6
Close
Main Menu