



ADDING/EDITING SALES OPPORTUNITIES

How to manage Quotes and Sales Opportunities using SalesNexus

Eldridge Ventilation

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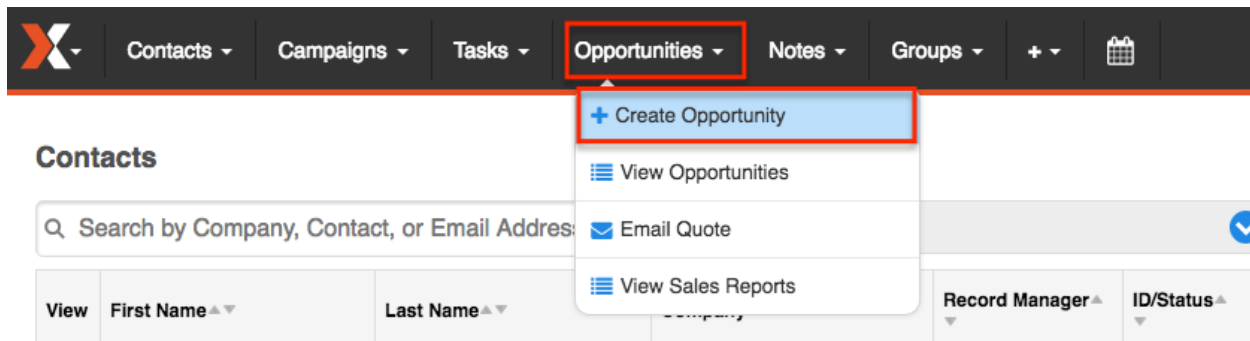
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Managing Quotes in the Opportunities Module

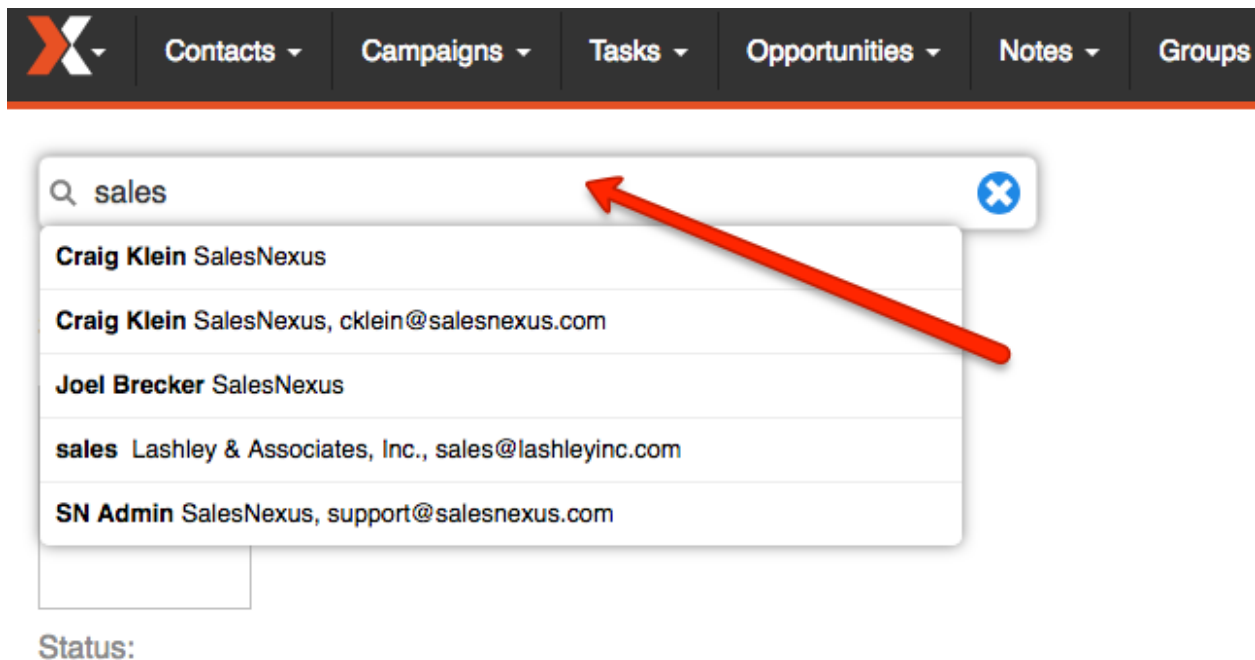
There are 2 ways to create a new Sales Opportunity (Quote) using SalesNexus.

The first way to create a new opportunity:

1. Select "Create Opportunity" from the main menu:



2. Then, search for associated contact for opportunity:



The second way to create a new Sales Opportunity (Quote) using SalesNexus:

1. Go to Contacts > View All Contacts > Select a Contact from the List using the “Blue Magnifying Glass”
2. From the Contact Record click “Add Opportunity”:

The screenshot displays the SalesNexus user interface for a contact record. At the top, a navigation bar includes tabs for Contacts, Campaigns, Tasks, Opportunities, Notes, and Groups. Below this, the contact's profile is shown for 'SN Admin', a Technical Support representative. A red box highlights the 'Add Opportunity' button, which is accompanied by a blue dollar sign icon. A red arrow points from the right towards this button. Other visible elements include a 'Schedule' button, an 'Add Note' button, a 'Tag' button, and a 'Phone Number' field with a 'call' icon. Below the phone number are buttons for 'Log Call with Note', 'Completed', 'Attempted', and 'Left Message'. The email address 'support@salesnexus.com' is also visible, along with 'Verify' and 'Email Template' buttons. The 'Record Manager' section shows 'SN Admin' as the current user, and the 'Company' is listed as 'SalesNexus'.

Creating the Sales Opportunity (Quote)

In order to generate a quote number, you are required to fill in the information on the Left Panel view of the Opportunity.

- Due Date
- Units, Price and Amount should be 0
- Select a Sales Stage
- Associate the Quote with a Group (Company)
- Click "Save" and the Right Panel will display the Quote Number

Sales opportunity for:



SN Admin
Technical Support
SalesNexus

Options ▾

Status:

Creation date	Due Date	Units
<input type="text" value="01/31/2018"/>	<input type="text" value="02/07/2018"/>	<input type="text" value="0"/>

Price	Amount
<input type="text" value="0.00"/>	<input type="text" value="0.00"/>

Sales Stage	Record Manager	Associate With Group
<input type="text" value="Prospect"/>	<input type="text" value="Ann Marie Shaw"/>	<input type="text" value="SalesNexus"/>

Once the Quote Information panel is displayed, you are required to fill in the following fields:

- Quote Location (Houston, Dallas, Corpus)
- Project Name
- Folder Path (Copy and Paste the Quote folder location from File Explorer)
- Equipment Type (Principal, can select more than one)
- Optional Information
 - Part Numbers
 - Details (Equipment Description, Status/Comments)
 - Order Date
 - Gross Profit

See next page for a detailed screenshot of the Quote Information Panel.

Sales Opportunities Layout:

Quote Information

Creation Date
12/08/2017

automatically generated → Quote Number
18-29990

select the office → Quote Location
Houston

Create project name → Project Name
Test project - 18-29990

Folder Path
smb://aserver/LCE Sales/03-Salesman Quotes & Correspondence/4 Star Hose/4 Star Hose 17H-27860-UNI

Select equipment/project.
Can select multiple principals. → Equipment Type
IAT, IAP, EFAN

Copy the quote folder and
paste the path here for
easy access in the future

Part Numbers
...

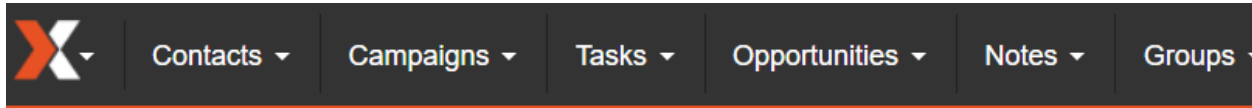
Details
Notes about equipment, status, or other comments go here

Order Number
...

Order Date
...

How to View Opportunities

- Go to Opportunities > View Opportunities
- Using the “Show” filter you can see:
 1. Open Opportunities
 2. Closed/Won
 3. Lost



Opportunities

Search for Opportunities by Company, Contact, or Email Address

All Date User Show

View	Contact	Company name	Amount	Details
<input checked="" type="checkbox"/>	SN Admin	SalesNexus	5000.00	
<input checked="" type="checkbox"/>		A & W Bearings & Supply Co Inc	Ann Marie Shaw	2/28/2018 50000.00