

CHAPTER 8: OPPORTUNITY MANAGEMENT

This chapter contains the following sections:

- Introduction to Opportunity Management
- Setting Up Opportunities
- Creating Opportunities
- Updating Opportunities
- Creating To-dos for Opportunities
- Creating Sales Quotes and Orders for Opportunities
- Closing and Deleting Opportunities
- Statistics
- Exercises

Introduction to Opportunity Management

Opportunities in the program refer to sales opportunities. You use opportunities to keep track of potential sales.

Sales Cycles

Before you can start using opportunity management, you must set up sales cycles and sales cycle stages. A sales cycle is made up of a series of stages that go from the initial contact to the closing of a sale. You can set up as many sales cycles as you need, and you can set up as many sales cycle stages as necessary within a sales cycle.

Opportunities

All opportunities must be associated with a salesperson and a contact. They can also be associated with a campaign.

You create opportunities using the Create Opportunities wizard. You provide information about the contact, salesperson, sales cycle, and dates, as well as your estimates for the sales value of the opportunity and your estimation of the chances of its success.

Once you have set up an opportunity, it remains inactive until you activate it with the Update Opportunity wizard. Activating an opportunity moves it into the first sales cycle stage. You can use the wizard with an opportunity as many times as necessary, to change dates, estimated values, or chances of success, and to move the opportunity to prior or later sales cycle stages and to skip stages, if necessary. Once an opportunity gets to the appropriate stage, you can set up a sales quote and sales order directly from the Sales & Marketing application area.

Setting Up Opportunities

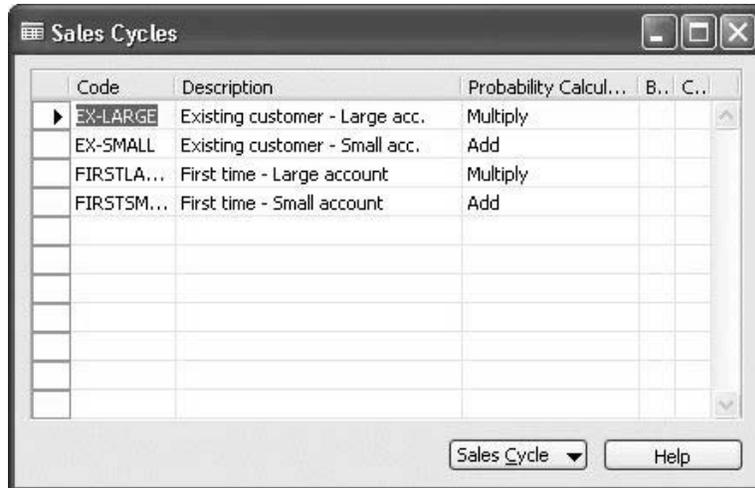
There are a number of setup tasks you must perform before you can begin to use opportunities. You must set up your sales cycles and sales cycle stages, close opportunity codes, default sales cycle code, and default virtual customer number.

Setting Up Sales Cycles

You use sales cycles to manage your sales opportunities. You set up separate sales cycles for each group of your contacts (for example, an industry group or a segment) whose members follow the same sales cycle. Once you have set up the sales cycles, you can set up the stages within each cycle.

To set up a sales cycle, follow this procedure:

1. Click SALES & MARKETING→SALES→SETUP→OPPORTUNITY→SALES CYCLES. The Sales Cycles window appears:



2. Press F3 to enter a new sales cycle.
3. Fill in the **Code**, **Description**, and **Probability Calculation** fields.

The probability calculation is based on the **Chances of Success (%)** and/or the **Completed (%)** fields on the opportunity card. There are four options you can select in the **Probability Calculation** field: Multiply, Add, Chances of Success %, or Completed %. If you select Chances of Success (%) or Completed (%), the probability percentage is copied from the corresponding field on the opportunity card. If you select Multiply, the probability percentage is calculated by multiplying the contents of the two fields. If you select Add, the probability percentage is calculated by adding the contents of the two fields.

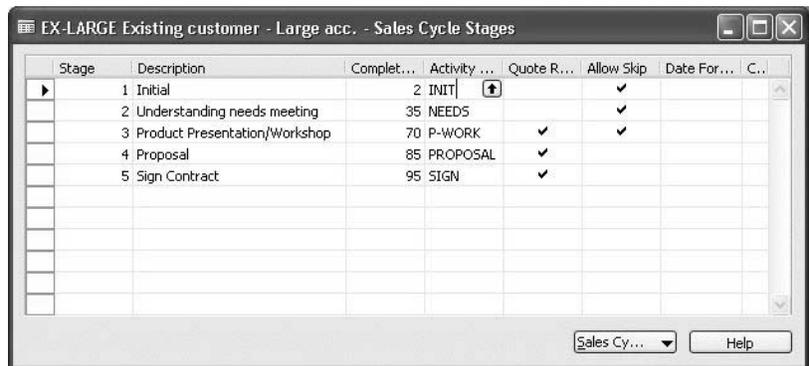
Repeat steps 2 and 3 to set up as many sales cycles as you want.

Setting Up Sales Cycle Stages

Now you can set up the sales cycle stages for each sales cycle. Follow this procedure:

1. Click SALES & MARKETING→SALES→SETUP→OPPORTUNITY→SALES CYCLES.

2. Find the sales cycle for which you want to set up stages, and click SALES CYCLE→STAGES. The Sales Cycle Stages window appears:



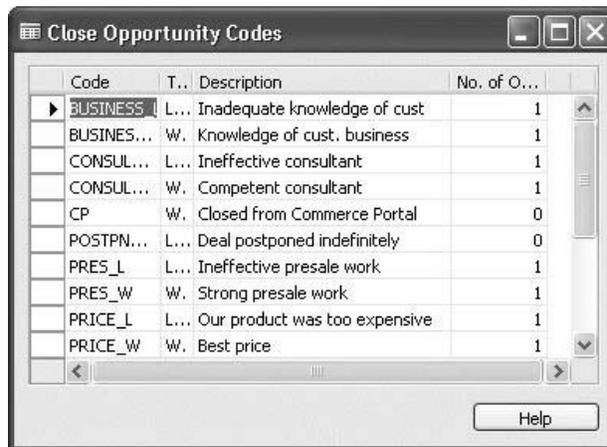
3. Press F3 to enter a new stage in the sales cycle.
4. Fill in the **Stage** and **Description** fields with the number and description of the stage.
5. In the **Completed %** field, enter the percentage of the sales cycle that has been completed when the opportunity reaches this stage.
6. In the **Activity Code** field, enter the code for the activity associated with the stage.
7. Place a check mark in the **Quote Required** field if a quote is required at this stage before the opportunity can move to the next stage in the sales cycle.
8. Place a check mark in the **Allow Skip** field to allow the opportunity to skip this stage and move on to the next stage.

Repeat steps 3 to 8 to set up as many stages as you want within the sales cycle.

Setting Up Close Opportunity Codes

You use close opportunity codes to indicate the reason an opportunity was closed. This can be used for statistics and analysis of sales strategies. Follow this procedure:

1. Click SALES & MARKETING→SALES→SETUP→OPPORTUNITY→CLOSE OPPORTUNITY CODES. The Close Opportunity Codes window appears:

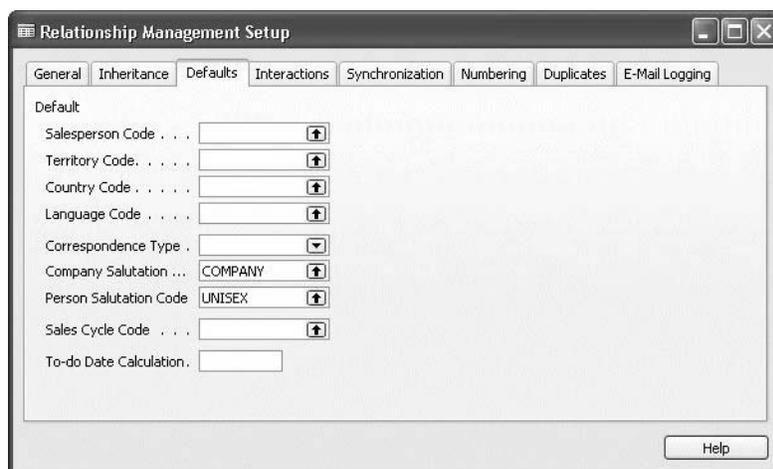


2. Press F3 to enter a new close opportunity code.
3. Fill in the **Code**, **Description**, and **Type** fields.
4. Repeat steps 2 and 3 to set up as many close opportunity codes as you want.

Setting Up the Default Sales Cycle Code

It is possible that you have only one sales cycle or that you have several sales cycles, but one of them applies to most of your opportunities. You can set up a default sales cycle code that the program assigns to opportunities when they are created. Follow this procedure:

1. Click SALES & MARKETING→SALES→SETUP→MARKETING SETUP. The Relationship Management Setup window appears:



2. On the **Defaults** tab in the **Sales Cycle Code** field, click the **AssistButton**, and select the sales cycle that you want to use as the default sales cycle.

Creating Opportunities

You can create opportunities for the potential sales you have with your contacts. All opportunities must be assigned to a salesperson/purchaser and must involve a contact.

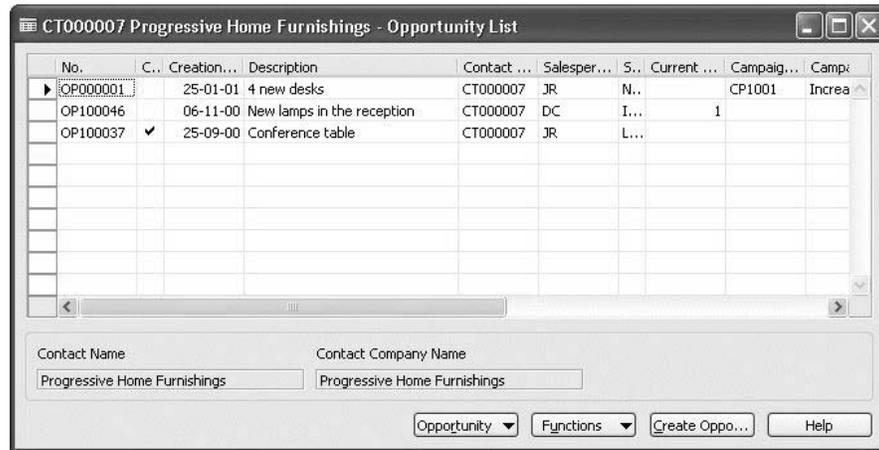
You can create opportunities from the Opportunity List window. Depending on where you access the Opportunity List window from, the window shows opportunities for either contacts, campaigns, or salespeople. The following procedure shows how to create opportunities from the contact card:

1. Click SALES & MARKETING→MARKETING→CONTACTS.
2. Find the contact involved in the opportunity, and click CONTACT→OPPORTUNITIES.
3. In the Opportunity List window, click **Create Opportunity**. The Create Opportunity wizard appears:



4. Fill in all the mandatory and any relevant optional fields of the wizard before clicking **Finish**.

Now the opportunity appears in the Opportunity List window for the contact (and for the salesperson):



When you have created an opportunity, you can activate the first sales cycle stage.

Activating an Opportunity

An opportunity is inactive until you activate it. You do this with the Update Opportunity wizard. Follow this procedure:

1. In the Opportunity List window, select the opportunity you want to activate, and click **FUNCTIONS**→**UPDATE**. The Update Opportunity wizard appears:



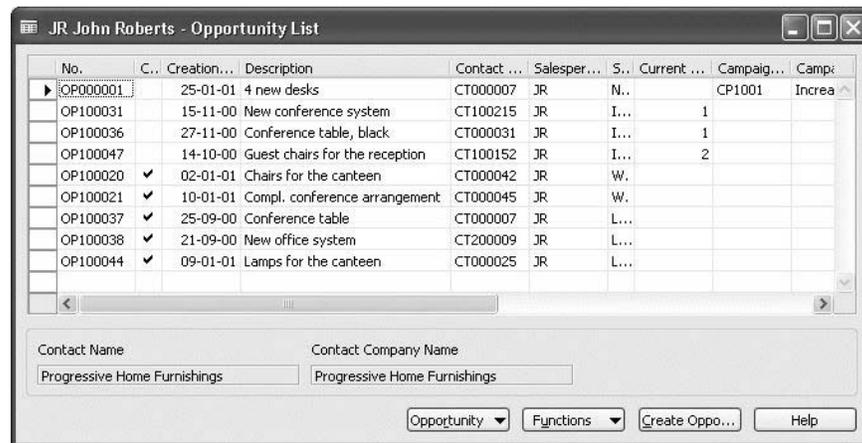
2. Fill in all the mandatory and any relevant optional fields of the wizard before clicking **Finish**.

Viewing Opportunities

Once you have created one or several opportunities, you can view the opportunities in either the Opportunity List window or the individual opportunity card for each of your opportunities.

The Opportunity List Window

You can open the Opportunity List window from the salesperson card, the campaign card, and the contact card. The window displays different information depending on where you open it from. For example, if you open the Opportunity List window from a salesperson card, the window displays all the opportunities created by that salesperson:

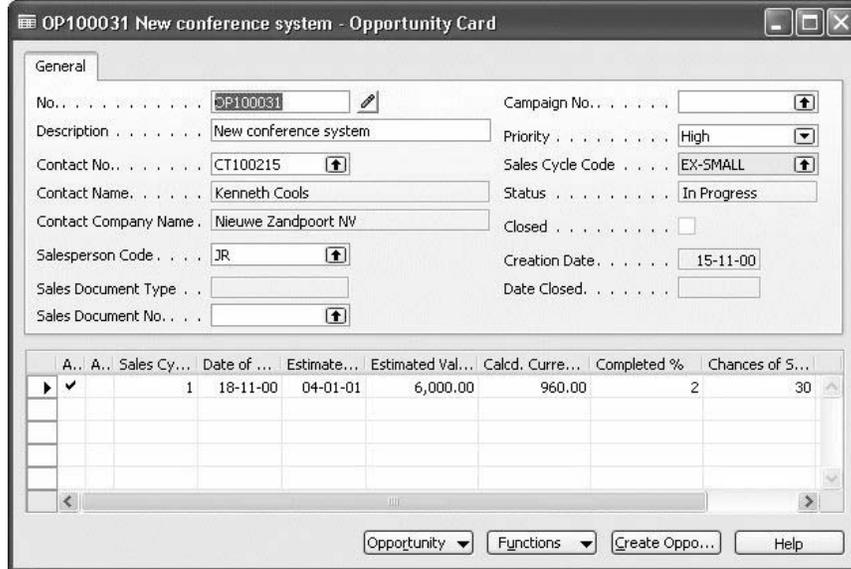


Closed opportunities appear at the end of the list.

The program automatically inserts a new line when you create an opportunity using the Create Opportunity wizard. You can do this by clicking **Create Opportunity**.

The Opportunity Card

From the Opportunity List window, you can open the opportunity card for an opportunity. On the opportunity card, you should see detailed information about a specific opportunity:



The opportunity card is composed of two parts, a header and lines. The header contains general information about the opportunity, such as a description of the opportunity, the sales cycle that it is linked to, the contact for the opportunity, and so on.

The lines contain the different entries made by the program when you update or close the opportunity.

In this window, you can create new opportunities by pressing F3 or by clicking **Create Opportunity**.

Exercise

Belinda Newman at New Concepts Furniture is interested in buying some new desk systems.

Create and activate an opportunity from the opportunity card for John Roberts involving this new contact.

Solution

When you have created the opportunity and activated it, the opportunity card should look something like this:

| A. | A. | Sales Cy... | Date of ... | Estimate... | Estimated Val... | Calcd. Curre... | Completed % | Chances of S... |
|----|----|-------------|-------------|-------------|------------------|-----------------|-------------|-----------------|
| ▶ | ▼ | 1 | 25-01-01 | 28-02-01 | 37,000.00 | 14,245.00 | 2 | 75 |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |

Updating Opportunities

You update opportunities for reasons such as to modify your evaluation of their chances of success and estimated values or to move them to a new sales cycle stage.

There may be situations where you need to move an opportunity back to a previous stage in the sales cycle. You would do this if you have moved them to the next stage too soon or if a stage needs to be repeated. You can also skip to a stage ahead if they move faster than expected in the model they follow. You can do all of this with the Update Opportunities wizard.

Using the Update Opportunity Wizard

You update opportunities from the Opportunity List window. The following procedure shows how to update opportunities from the contact card:

1. Click SALES & MARKETING→MARKETING→CONTACT.
2. Find the contact related to the opportunity, and click CONTACT→OPPORTUNITIES.

3. In the Opportunity List window, click **FUNCTION**→**UPDATE**. The Update Opportunity wizard appears:



4. In the first window of the wizard, select the relevant option, and then click **Next**.

NOTE: Within a sales cycle, you can only skip stages for which you have selected the **Allow Skip** field in the Sales Cycle Stages window.

5. Fill in all the mandatory and any relevant optional fields of the wizard before clicking **Finish**.

Creating To-dos for Opportunities

You can create to-dos for opportunities. You create to-dos from the To-do List window for the relevant opportunity. The following procedure involves a campaign:

1. Click **SALES & MARKETING**→**MARKETING**→**CAMPAIGNS**.
2. Select the relevant campaign and click **CAMPAIGN**→**OPPORTUNITIES**.
3. Select the relevant opportunity in the Opportunity List window.
4. Click **OPPORTUNITY**→**TO-DOS**. The To-do List window for the opportunity appears.

- In the To-do List window, click **Create To-do**. The Create To-do wizard appears:

This wizard helps you to create to-dos.

What is the type of to-do?

Describe your to-do.

All Day Event

What is the start date and time of the to-do?
25-01-01

What is the duration of the To-do?
1 day

What is the end date and time of the to-do?
25-01-01

Team to-do

< Back Next > Finish Cancel

- Fill in all the mandatory and any relevant optional fields of the wizard before clicking **Finish**.

Now the to-do appears in the To-do List window for the opportunity:

| Closed | Starting ... | T. | Description | P. | S. | No. | Date Clo... | Canceled | Comment | G |
|--------|--------------|----|---------------------------------|----|----|----------|-------------|----------|---------|----|
| ✓ | 22-12-00 | | Verify quality of opportunity | H. | C. | TD100017 | 22-12-00 | | | C |
| ✓ | 29-12-00 | | Identify key persons | N. | C. | TD100018 | 29-12-00 | | | C |
| | 25-01-01 | | Est. customer needs | L. | N. | TD000086 | | | | C |
| | 28-01-01 | P. | Set up meeting | N. | N. | TD000088 | | | | C |
| | 29-01-01 | | Get samples for meeting | N. | N. | TD000094 | | | | C |
| | 08-02-01 | M. | Go through expectations and ... | H. | N. | TD000090 | | | | (M |
| | 15-02-01 | | Verify/change customer needs | N. | N. | TD000092 | | | | C |

Contact Name: David Oliver Lawrence Contact Company Name: A Gibson's Lawfirm

To-do Functions Create To-do Help

Exercise

Create a to-do for the opportunity OP100031 starting from the salesperson/purchaser card for John Roberts.

Creating Sales Quotes and Orders for Opportunities

When handling sales opportunities, you may need to create a quote for the contact that the opportunity is linked to, and you may need to create an order from the quote.

Creating Sales Quotes for Opportunities

You can create quotes for opportunities from the Opportunity List window. The following procedure shows how to create sales quotes for opportunities from the contact card:

1. Click SALES & MARKETING→MARKETING→CONTACTS.
2. On the contact card, select the contact for the opportunity, and click CONTACT→OPPORTUNITIES.
3. In the Opportunity List window, click FUNCTIONS→ASSIGN SALES QUOTE. The Sales Quote window appears:

4. Fill in the fields in the Sales Quote window:

The screenshot shows the 'Sales Quote' window for '1002 New Concepts Furniture'. The window has tabs for 'General', 'Invoicing', 'Shipping', 'Foreign Trade', and 'E-Commerce'. The 'General' tab is active, showing various fields for customer information, dates, and salesperson details. Below the fields is a table with one row of data.

| T. No. | Description | Location | Quantity | Unit of M... | Unit Pric... | Line Amount |
|-------------|-------------------------|----------|----------|--------------|--------------|-------------|
| I... 1964-5 | TOKYO Guest Chair, blue | YELLOW | 5 | PCS | 192.81 | 915. |

At the bottom of the window are buttons for 'Quote', 'Line', 'Functions', 'Make Order', 'Print...', and 'Help'.

Creating Sales Orders for Opportunities

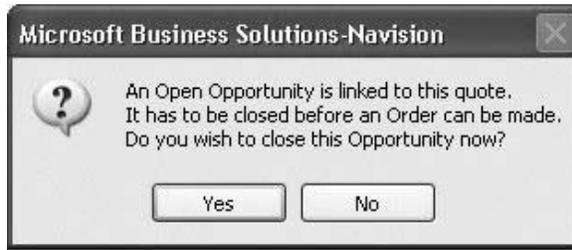
You can make sales orders from the sales quotes that you have created for your opportunities.

Before you can do this, you must create the contact as a customer (see “Creating Customers, Vendors, and Bank Accounts from Contacts”).

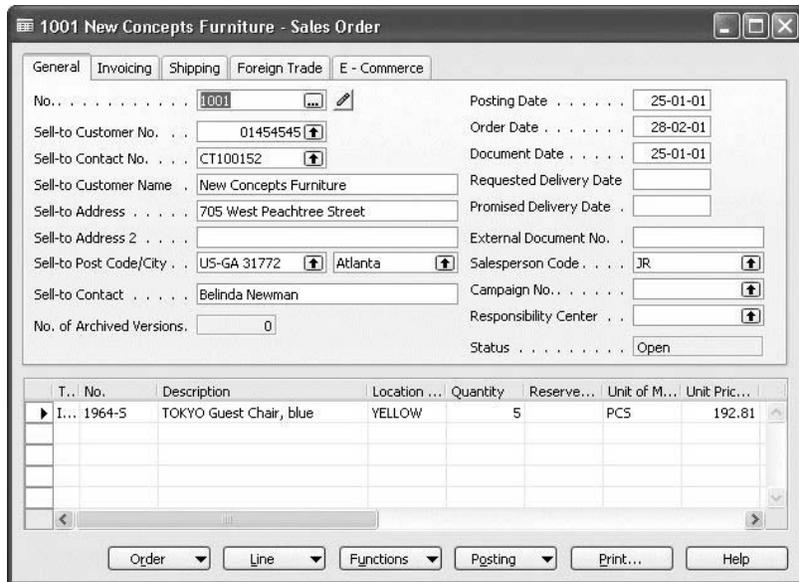
You can create sales orders for opportunities from the Opportunity List window. The following procedure shows how to create sales orders for opportunities from the salesperson/purchaser card:

1. Click SALES & MARKETING→SALES→SALESPEOPLE.
2. Browse to the relevant salesperson/purchaser card for the opportunity, and then click SALESPERSON→OPPORTUNITIES. The Opportunity List window for that salesperson appears.
3. Select the opportunity that you have created a sales quote for, and then click FUNCTIONS→ASSIGN SALES QUOTE. The Sales Quote window appears, containing the sales quote that you have assigned to the opportunity.
4. Enter any additional information in the Sales Quote window, and then click **Make Order**. A message appears asking you to confirm. The program automatically converts the quote into an order.

- If you have not closed the opportunity, a message appears in which you must click **Yes**.



- When you click **Yes**, the Update Opportunity wizard appears, and you can close the opportunity (see “Closing and Deleting Opportunities”).
- You can see the order you created by opening the relevant customer card and clicking SALES→ORDERS. The sales order that you created appears:



Closing and Deleting Opportunities

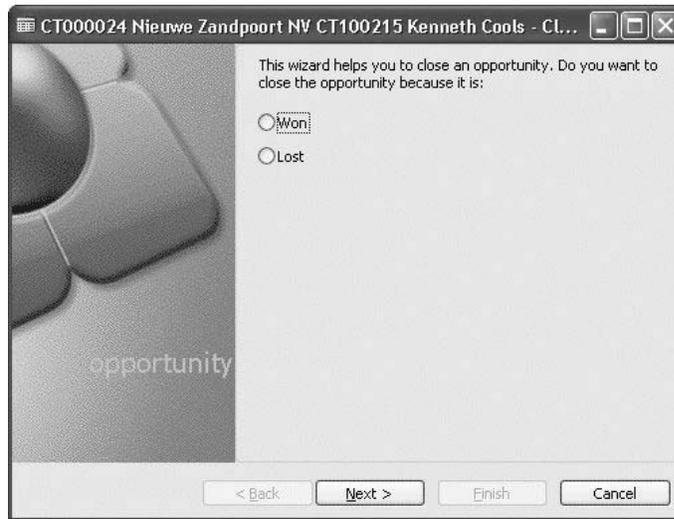
You can close opportunities when the negotiations are over. When closing an opportunity, you can specify the reasons for closing it. To do this, you must set up close opportunity codes.

You can close opportunities from the Opportunity List window. The following procedure shows how to close opportunities from the contact card:

- Click SALES & MARKETING→MARKETING→CONTACTS.

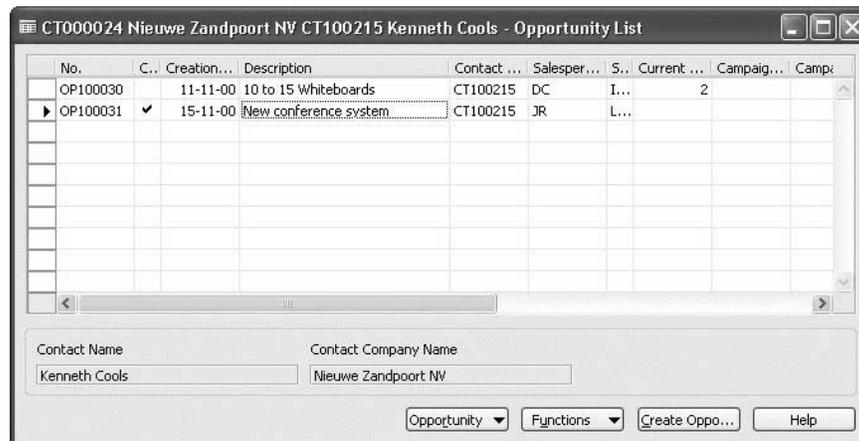
Microsoft Navision Relationship Management

2. On the contact card, select the contact for the opportunity, and click CONTACT→OPPORTUNITIES.
3. In the Opportunity List window, click FUNCTIONS→CLOSE. The Close Opportunity wizard appears:



4. Fill in all the mandatory and any relevant optional fields of the wizard before clicking **Finish**.

After you have closed the opportunity, the program places a check mark in the **Closed** field, found in the Opportunity List window, and enters the relevant date in the **Date** field:



Closed opportunities can be deleted.

Deleting Opportunities

You can delete opportunities, for example, after you have concluded a deal or when the Opportunity List window is very full with many closed opportunities. Only closed opportunities can be deleted.

To delete closed opportunities, follow this procedure:

1. Click **ADMINISTRATION**→**IT ADMINISTRATION**→**DATA DELETION**→**DELETE CLOSED OPPORTUNITIES**. The Delete Opportunities window appears:



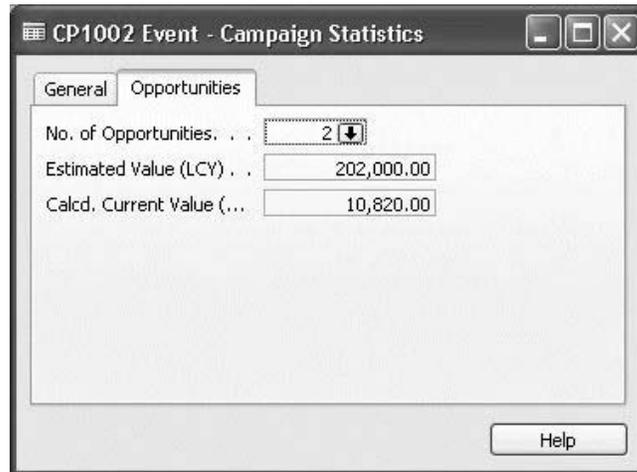
2. Select the **No.** field, and in the **Filter** field, click the **AssistButton** to select the closed opportunities that you want to delete.
3. Click **OK**.

Statistics

You can view statistics about opportunities in a number of ways and from several different windows. There is an **Opportunities** tab in the Contact Statistics, Salesperson Statistics, and Campaign Statistics windows that provides statistics about the opportunities for the individual contact, salesperson, or campaign. There is also a statistics window for each individual sales cycle, sales cycle stage, and opportunity. Finally, there is the Opportunities window, where you can choose the type of information to be displayed, the period you want to view, and the filters you want applied.

Contact, Campaign, and Salesperson Statistics

The **Opportunities** tab in the Contact Statistics, Salesperson Statistics, and Campaign Statistics windows displays the number of opportunities, the estimated value, and the current value of all the opportunities for that contact, salesperson, or campaign. To see statistics for contacts, salespeople, or campaigns, browse to the relevant card, and click **Contact**, **Salesperson**, or **Campaign**, and then click **Statistics**. The Statistics window appears:



Sales Cycle and Sales Cycle Stage Statistics

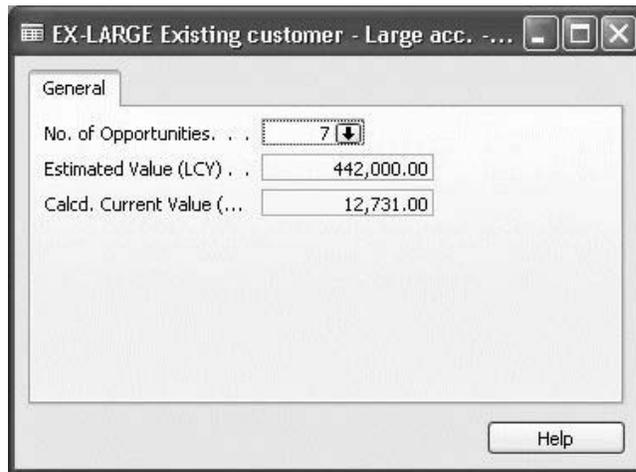
The Sales Cycle Statistics and Sales Cycle Stage Statistics windows display the number of opportunities, the estimated value, and the current value of the opportunities for the sales cycle or sales cycle stage. The Sales Cycle Stage Statistics window divides the opportunities into active and inactive opportunities and also reports the average number of days the opportunity entry was open.

Sales Cycle Statistics

To view the Sales Cycle Statistics window, follow this procedure:

1. Click SALES & MARKETING→SALES→SETUP→OPPORTUNITY→SALES CYCLES. The Sales Cycles window appears.
2. Select the sales cycle you want to see statistics for.

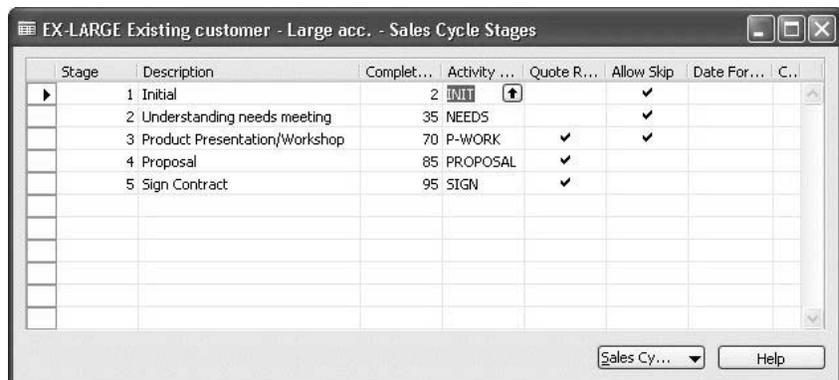
3. Click SALES CYCLES→STATISTICS. The window looks like this:



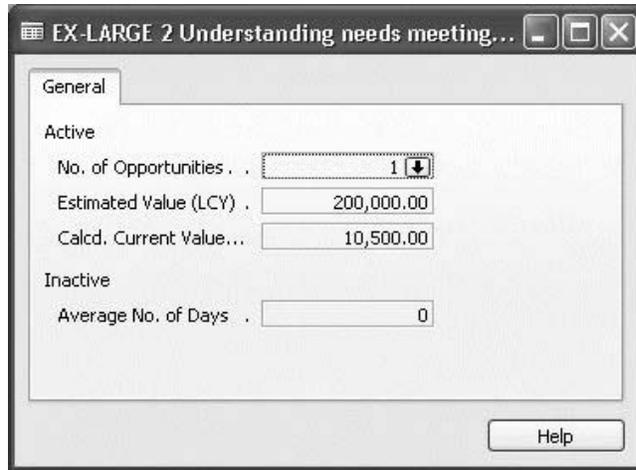
Sales Cycle Stage Statistics

To view the Sales Cycle Stage Statistics window, follow this procedure:

1. Click SALES & MARKETING→SALES→SETUP→OPPORTUNITY→SALES CYCLES. The Sales Cycles window appears.
2. Select the sales cycle that contains the stage you want to see statistics for.
3. Click SALES CYCLE→STAGES. The Sales Cycle Stages window appears:



4. Select the relevant sales cycle stage, and then click SALES CYCLE STAGE→STATISTICS. The Sales Cycle Stage Statistics window for that stage appears:



The screenshot shows a window titled "EX-LARGE 2 Understanding needs meeting...". The window has a "General" tab selected. Under the "Active" section, there are three fields: "No. of Opportunities" with a value of 1, "Estimated Value (LCY)" with a value of 200,000.00, and "Calcd. Current Value..." with a value of 10,500.00. Under the "Inactive" section, there is one field: "Average No. of Days" with a value of 0. A "Help" button is located at the bottom right of the window.

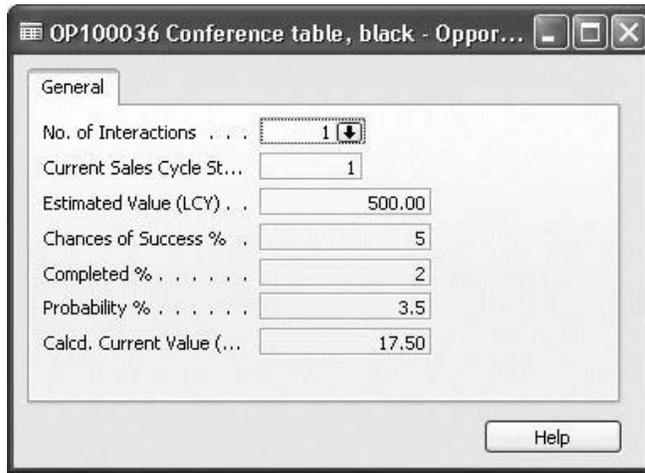
Opportunity Statistics

The Opportunity Statistics window provides information about an individual opportunity, such as the sales cycle stage, the current value, the chances of success, and the number of interactions linked to the opportunity. You can view the list of these interactions in the Interaction Log Entries window if you click the **AssistButton** to the right of the **No. of Interactions** field.

You open the Opportunity Statistics window from the Opportunity List window. Depending on where you access the Opportunity List window from, the window shows opportunities for either contacts, campaigns, or salespeople. The following procedure shows how to view the opportunity statistics from the salesperson/purchaser card. Follow this procedure:

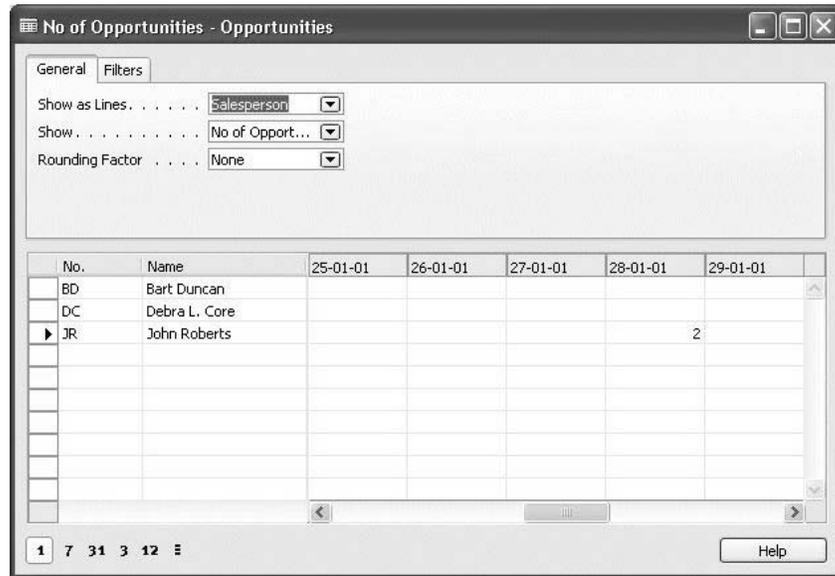
1. Click SALES & MARKETING→SALES→SALESPEOPLE.
2. Find the salesperson card for the salesperson responsible for the opportunity.
3. Click SALESPERSON→OPPORTUNITIES. The Opportunity List window appears.

4. Select the relevant opportunity and click OPPORTUNITY→STATISTICS. The Opportunity Statistics window appears:



The Opportunities Window

In the Opportunities window, you can gain an overview of your opportunities. You open the window by clicking SALES & MARKETING→SALES→OPPORTUNITIES:



The window displays different information depending on the options you select on the **General** tab, found in the **Show as Lines** and **Show** fields. You can, for example, have the program display the number of opportunities by campaign or the estimated value of your opportunities by salesperson. On the **Filters** tab, you can set filters, for example, if you only want to include information about opportunities that are in a certain sales cycle. You select the time period in the lower left corner of the window.

Example

You want to see the current value of your opportunities in months from November 2000 to March 2001. Follow this procedure:

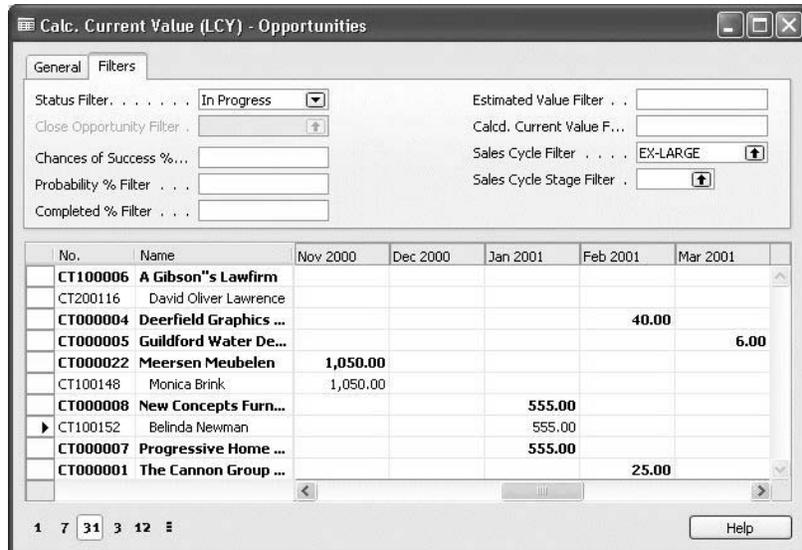
1. Click SALES & MARKETING→SALES→OPPORTUNITIES.
2. Click the **General** tab.
3. In the **Show as Lines** field, select Contact.
4. In the **Show** field, select Cal. Current Value (LCY). The window should look something like this:

| No. | Name | Nov 2000 | Dec 2000 | Jan 2001 | Feb 2001 | Mar 2001 |
|----------|----------------------|----------|----------|----------|----------|----------|
| CT000003 | John Haddock Insu... | | | | | 320.00 |
| CT200079 | Tina Gorenc | | | | | 320.00 |
| CT000030 | Libros S.A. | | 4.80 | 4.80 | | |
| CT100230 | Jaime Bastidas | | 4.80 | 4.80 | | |
| CT000026 | Lovina Contractors | 277.50 | | | | |
| CT100163 | Doris Hartwig | 277.50 | | | | |
| CT000022 | Meersen Meubelen | 1,050.00 | | | | |
| CT100148 | Monica Brink | 1,050.00 | | | | |
| CT000008 | New Concepts Furn... | 75.00 | | 605.00 | | |
| CT100152 | Belinda Newman | 75.00 | | 605.00 | | |

5. Click the **Filters** tab.

Now you decide to include only opportunities in the sales cycle EX-LARGE.

- Click the **Filters** tab, and in the **Sales Cycle Filter** field, click the **AssistButton**, and select EX-LARGE. The window should now look something like this:



Using the Opportunities Bar Chart

Included with version 4.0, is a new means for working with statistical data, the Opportunities Bar Chart. This chart serves for graphically comparing and analyzing your estimated value and the calculated current value of your opportunities.

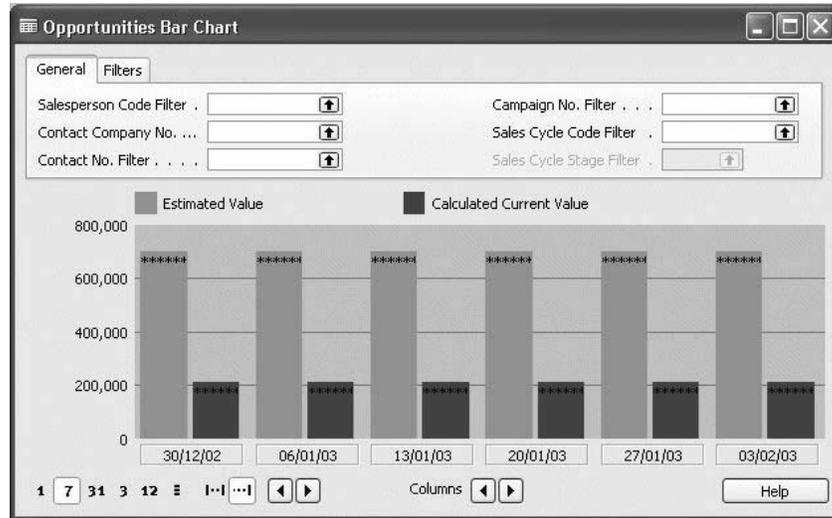
The program takes data from opportunity entries and uses it to create a chart in the Opportunities Bar Chart window.

You can refine the selection of opportunity entries by applying various filters and adjusting the time periods for which you want to have the information displayed.

In the Opportunities Bar Chart window, the current estimated and current calculated value series are easily identifiable by bar color (blue for estimated value, red for current calculated value). The amount of values can be judged by the height of the bars.

The Opportunities Bar Chart Window

In the Sales and Marketing area, the Opportunity Bar Chart window can be accessed either from the Contact or Campaign window.

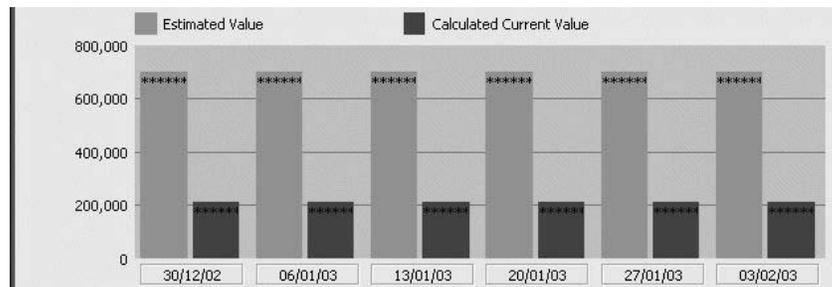


To open it from the Contact window, click SALES & MARKETING→CONTACTS. The Contact window appears. Click CONTACT→OPPORTUNITIES→BAR CHART.



In the header of the window, you can see two tabs where you can apply different filters to the bar chart.

Below the header is the bar chart itself.



The estimated value and calculated current value series are grouped by time periods. Beneath the chart, there are six labels that display when each period starts.

In the lower left-hand corner, you can see several buttons for specifying time periods. Each button updates the bar chart to represent the information on estimated value and calculated current value in the intervals that you choose:

1 (Daily), 7 (Weekly), 31 (Monthly), 3 (Quarterly), 12 (Yearly), and three horizontal lines (by Accounting Periods).



The next group of buttons controls the display mode of the Estimated Value and Calculated Current Value series.



The first button (the **Net Change** button, which depicts two dots encased by two vertical lines) shows the values for the specified periods. The second button (the **Balance at Date** button, which depicts three dots leading up to a vertical line) shows the aggregate value on the end date of each specified period.

Browsing the estimated value and calculated current value of your opportunities in the bar chart

In the header of the Opportunities Bar Chart window, specify the criteria according to which the program will filter your opportunity entries to calculate your estimated and calculated current value information, and then display it in the bar chart. To see all the opportunity entries by specified time periods, you should remove all the existing filters in the header.

There are two ways for you to define a set of service ledger entries:

- Click the **lookup** button in any of the fields in the header, and choose the window in which the value that you require appears. Fill in more than one field in the header if you want to make your selection even more precise.
- If you want to view the opportunity entries for a salesperson connected to a specific contact, you simply enter the salesperson code and the contact number in the appropriate fields (select them using the **lookup** button).
- Or enter a filtering expression in the appropriate field or fields using the usual syntax for filtering expressions in Microsoft® Business Solutions–Navision®.

In the bar chart, the data can be viewed by different time periods, which should give you better control over your income and cost. To see your income and cost grouped by days, months, or years, you only need to click the appropriate button in the window.

Test Your Skills – Setting Up a Sales Cycle

Scenario: You are Debra L. Core, a sales assistant at Cronus. Your job is to help the salespeople with their tasks involving opportunity management.

Set up a new sales cycle for medium-sized customers. Use chances of success for the probability calculation. Decide on your own sales cycle stages or use the following: Initial, Company Presentation, Understanding Needs, Proposal, Presentation/Workshop, Sign Contract. Allow at least one stage to be skipped, and make at least one stage require a quote.

Test Your Skills – Activating Sales Stages

Scenario: You make a new contact regarding the Millennium series with a company called The Bicycle Warehouse.

1. Create a contact card for this new contact whose address is: 16 Cecil Street, GB-WD1 6YG Watford.
2. Create a new opportunity for the contact. Use the sales cycle you created for medium-sized customers.
3. Activate the first stage of your opportunity with The Bicycle Warehouse.
4. You hit it off well with your contact and are able to skip one stage.
5. Move the opportunity to the appropriate stage.
6. Open the statistics window for the opportunity. What is the estimated value and the current value of the opportunity?

Test Your Skills – Viewing Lost Opportunities

Scenario: Your opportunity has reached the stage where you must provide a quote.

1. Create the quote, look at the statistics for the contact, and see what the estimated and current values are. Are there other opportunities included in the totals?

It looks like you have won the sale – the contact wants to place an order.

2. Set up the contact as a customer, and create an order from the quote. Ignore any inventory warnings you may receive.
3. You want to see the number of lost opportunities by salesperson.
4. Use the Opportunities window to see this. How many opportunities have been won?

Quick Interaction: Lessons Learned

Take a moment to write down three Key Points you have learned from this chapter:

1.

2.

3.
