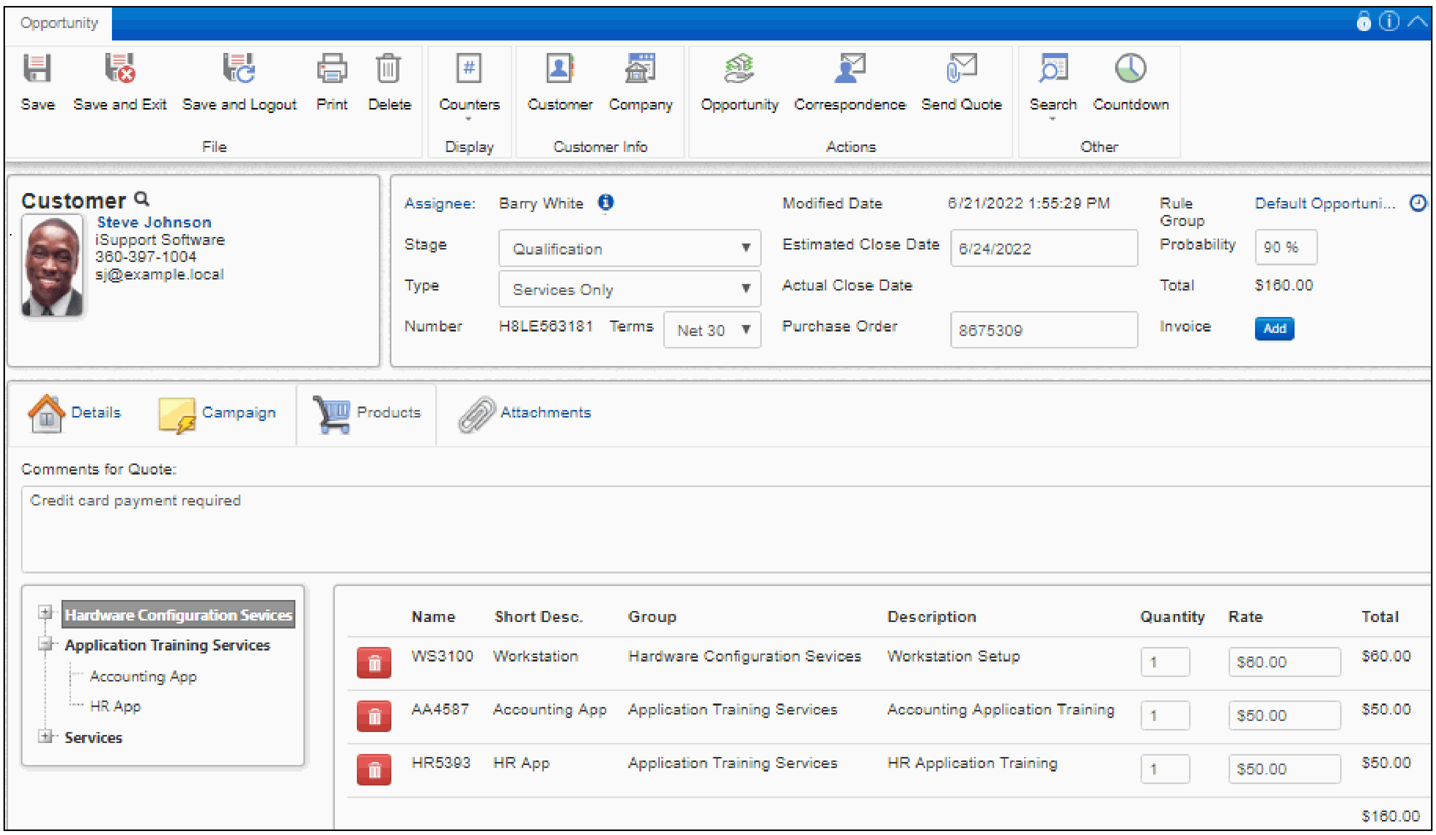
Using the iSupport® Opportunity Screen

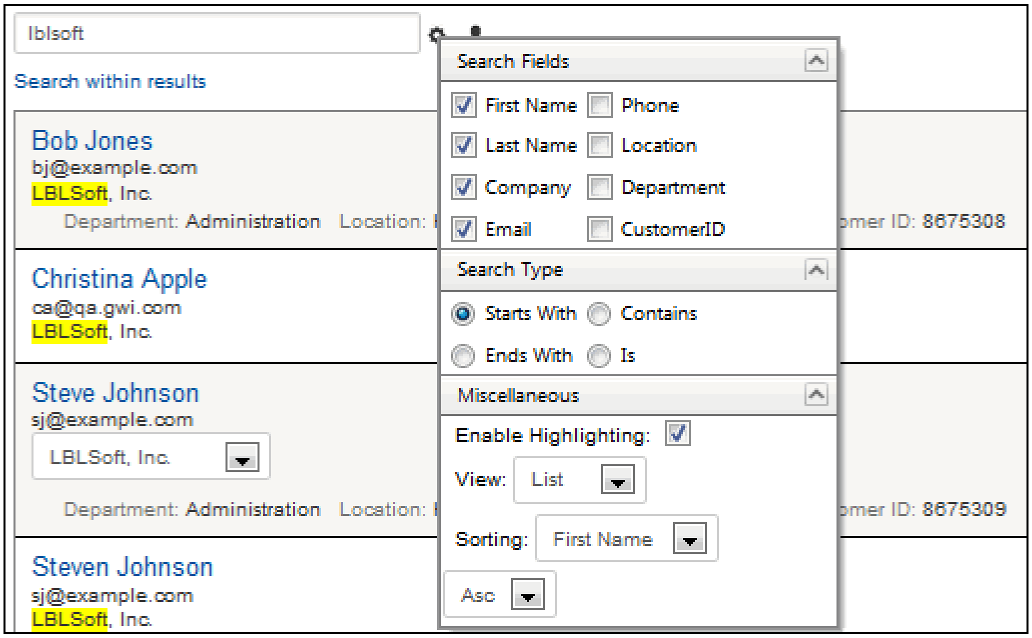
iSupport's Opportunity functionality enables you to create Opportunity records, quotes, and invoices using configured products and product groups. You can use opportunity types, campaigns, and stages for lead and opportunity tracking and reporting. You can generate quotes and invoices in PDF format utilizing correspondence templates that can include data from opportunities, customers, etc. Fields or functionality may not display if disabled or disallowed due to permissions set during configuration.

Access the Opportunity screen via the Opportunity option on the Desktop menu or the New menu in the Customer Profile and Company screens. The following sections contain information on **all** Opportunity functionality.



Entering Customer Information

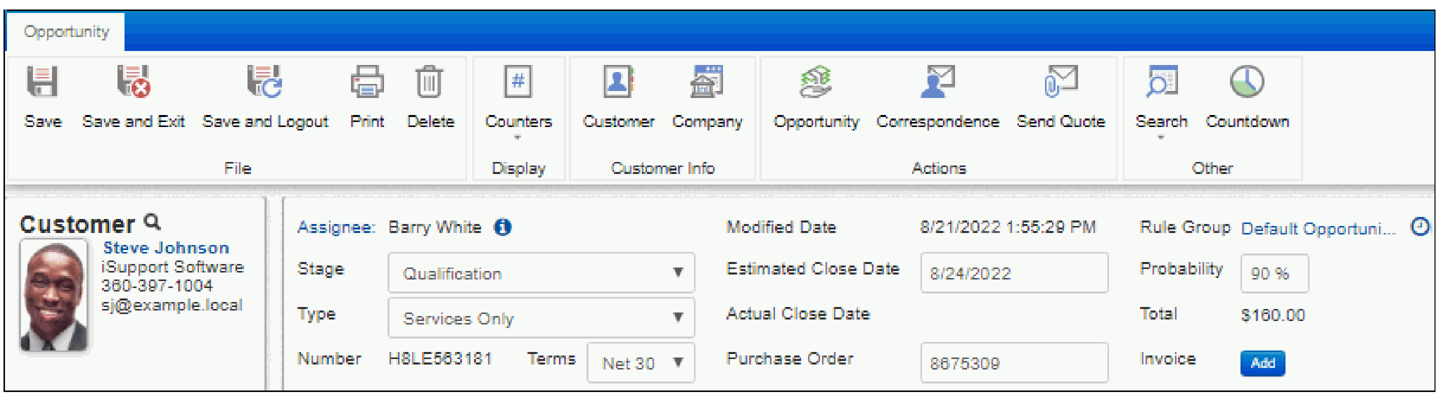
The Select Customer dialog will appear the first time you display the Opportunity screen or when you select the Select Customer option. You can enter the first few characters of the name for faster searching. **Note:** The selected search fields are retained in a browser cookie; the next time you perform a search, your selections will be retained default. To enter information for a new customer, click the Create New Customer link. Note: each Customer Profile record must have a unique email address and first and last name combination.



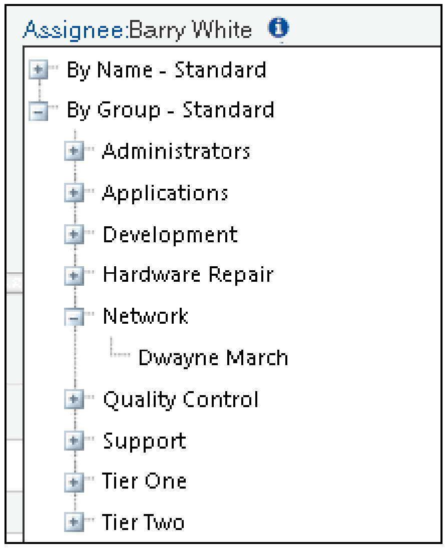
To display or change an existing customer's profile information, select Opportunity | Customer. To view information on the customer's company, select Opportunity | Company.

Entering Basic Information

The upper portion of the Opportunity screen includes fields for setting the stage, type, estimated close date, probability, and more.



Assignee - Click the Assignee link to select the support representative to assign to the opportunity. You may be able to select an assignee by name or by group. To route an opportunity, click the Assignee link. (Note that you can also route one or more opportunities via the Desktop. Select Information next to the Assignee field to display the assignee's group, email address, and phone. You can click the Email link to send an email to the assignee. To view the assignee's contact information, skills, and groups, click the View Rep Details link.



Stage - Select the preconfigured stage that describes the opportunity's current place in the order process.

Type - Select the preconfigured type that describes the opportunity. Opportunity types are used in tracking and reporting on Opportunity records.

Terms - Select the preconfigured terms for invoice payment.

Modified Date - The last date on which the opportunity was modified appears.

Estimated Close Date - Enter the date on which you anticipate the opportunity to be won or lost.

Actual Close Date - Enter the date on which the opportunity was won or lost.

Invoice - Click the Add button to attach a PDF file to the Opportunity record. Note: this file will not appear on the Attachments tab. An Invoice Unpaid option will appear if a file is added; you can select this option to flag the invoice as Paid.

Rule Group - Rules perform actions when specified conditions are met. In order for a rule to be evaluated, it must be included in a rule group; rule groups are applied to opportunities through customers, companies, and support representatives. (A default rule group will apply if none are applicable.) When an opportunity is saved, the matching rule group is first determined. Then, all rules in that matching rule group are evaluated. If a rule's conditions are met, its actions are performed. This functionality can be used to:

- Change values in the Assignee, Customer, Probability, Stage, Type, Estimated Close Date, as well as in any custom fields
- Send notifications

There are four types of rules:

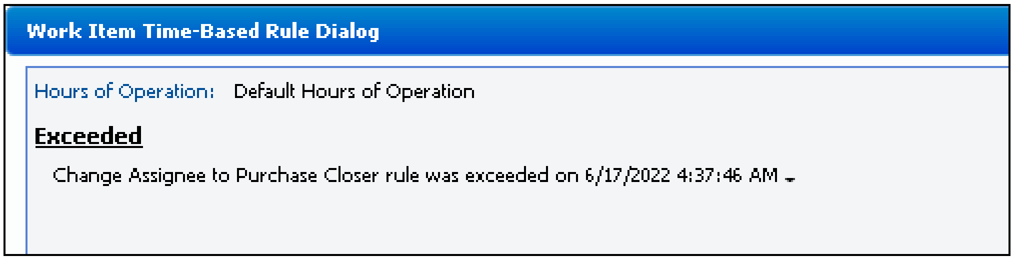
On Opportunity Save rules do not incorporate time frames; when conditions are true upon save of an associated opportunity, the actions will be performed.

Time-Based rules incorporate time frames with conditions; when conditions are true upon opportunity save, the date and time that the interval time frame would be reached is recorded and monitored by the Time-Based Rule agent. If the conditions required to meet the rule do not change before the interval time frame is reached, the agent performs the actions specified. If conditions change prior to the recorded date and time:

- **Time-Based** rules will clear all pending actions and if conditions are met again the time frame will restart.
- **Time-Based: Cumulative** rules will suspend all pending actions and if conditions are met again the time frame will include previous amounts of time in which conditions were met.
- **Time-Based: Important Dates** rules will perform the specified action(s) when the defined number of days before or after the configured date (creation date or estimated close date) occurs.

You may be assigned to a support center with a time zone, and that time zone will used for time/date stamps.

Click the name of the rule group in the Rule Group field to display the Time-Based Rule dialog; it displays actions that will be and have been taken by any time-based rules in the current rule group for the opportunity. You can also view the hours of operation in effect for the rule group. ***Note that time frames reflect the assignee's support center time zone. The actual action dates and times will depend on execution of the Time-Based Rule agent***.



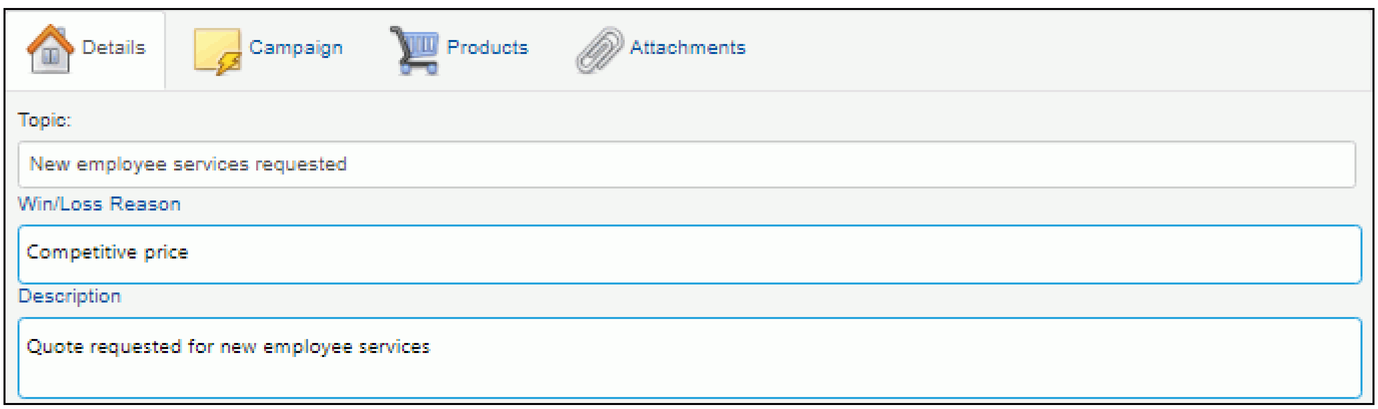
The Hours of Operation link displays the time frames in which the rule group is in effect. The Opportunity Rule Group option on the History tab will display all rule group events such as when a rule is met and actions taken by rules in the rule group; see "Entering Notes and Viewing History" on page 6 for more information.

Probability - Enter the probability that the opportunity will result in an order.

Total - The total price (quantity x rate) for all products selected on the Products tab.

Entering the Topic, Win/Loss Reason, and Description

Use the Details tab to enter the topic, reason for winning or losing the opportunity, and description of the opportunity.



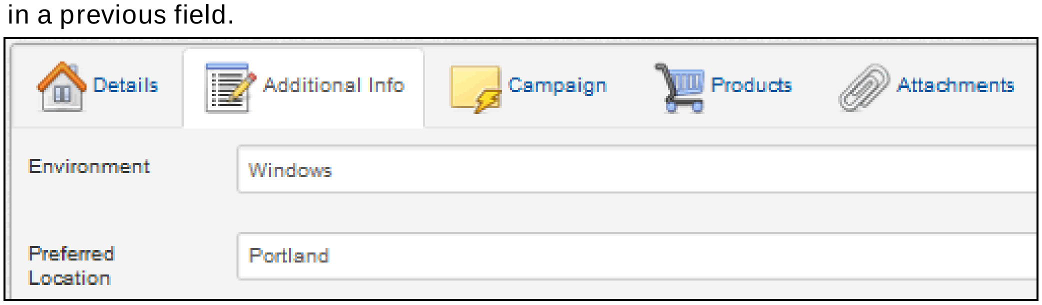
Topic - Enter a short description of the opportunity.

Win/Loss Reason - If the opportunity was won or lost, enter the reason.

Description - Enter a description of the opportunity.

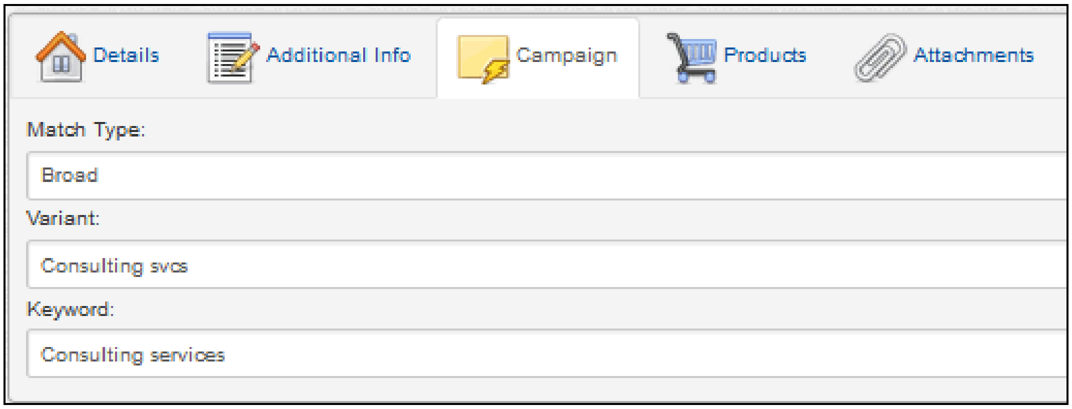
Completing Custom Fields

Custom fields can be configured to be required on save or close of the opportunity or to display after a specified value is entered in a previous field.



Entering Campaign Information

Use the fields on the Campaign tab to enter information about the search keyword that resulted in the opportunity with the customer.



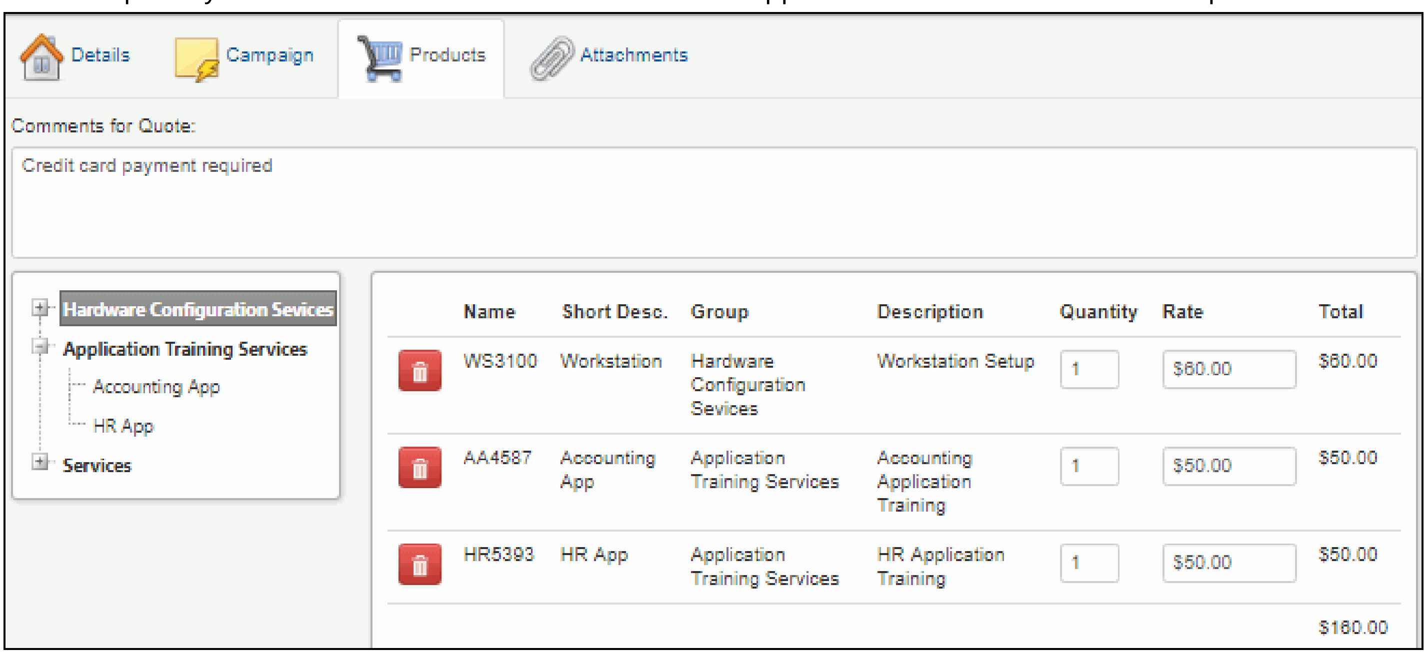
Match Type - Enter the match type that resulted in the opportunity with the customer. Typical match types are "Broad", "Phrase", and "Exact".

Variant - Enter the version of the keyword that resulted in the opportunity with the customer.

Keyword - Enter the search keyword that resulted in the opportunity with the customer.

Selecting Products and Entering Comments

On the Products tab, select the items for the quote by dragging from the list on the left to the area on the right. Then enter the quantity and rate. You can also enter comments to appear under selected items on the quote.



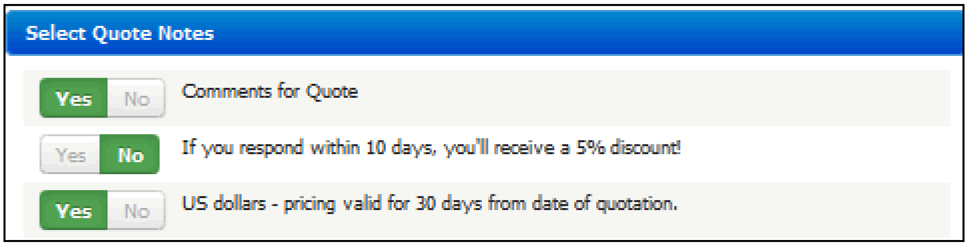
Exporting Information to QuickBooks

QuickBooks integration functionality enables an Export to QuickBooks option to appear in the Opportunity screen for sending opportunity information to QuickBooks to create an invoice. If the customer's company does not exist in QuickBooks, a Sync Company to QuickBooks dialog will appear with a list of the companies in QuickBooks and a Create New button for adding the new company to the QuickBooks system. After clicking Continue in this dialog, a connection is created between the company in iSupport and the company in QuickBooks so that future opportunities can utilize this connection. Use the Disconnect From QuickBooks option to break this connection.

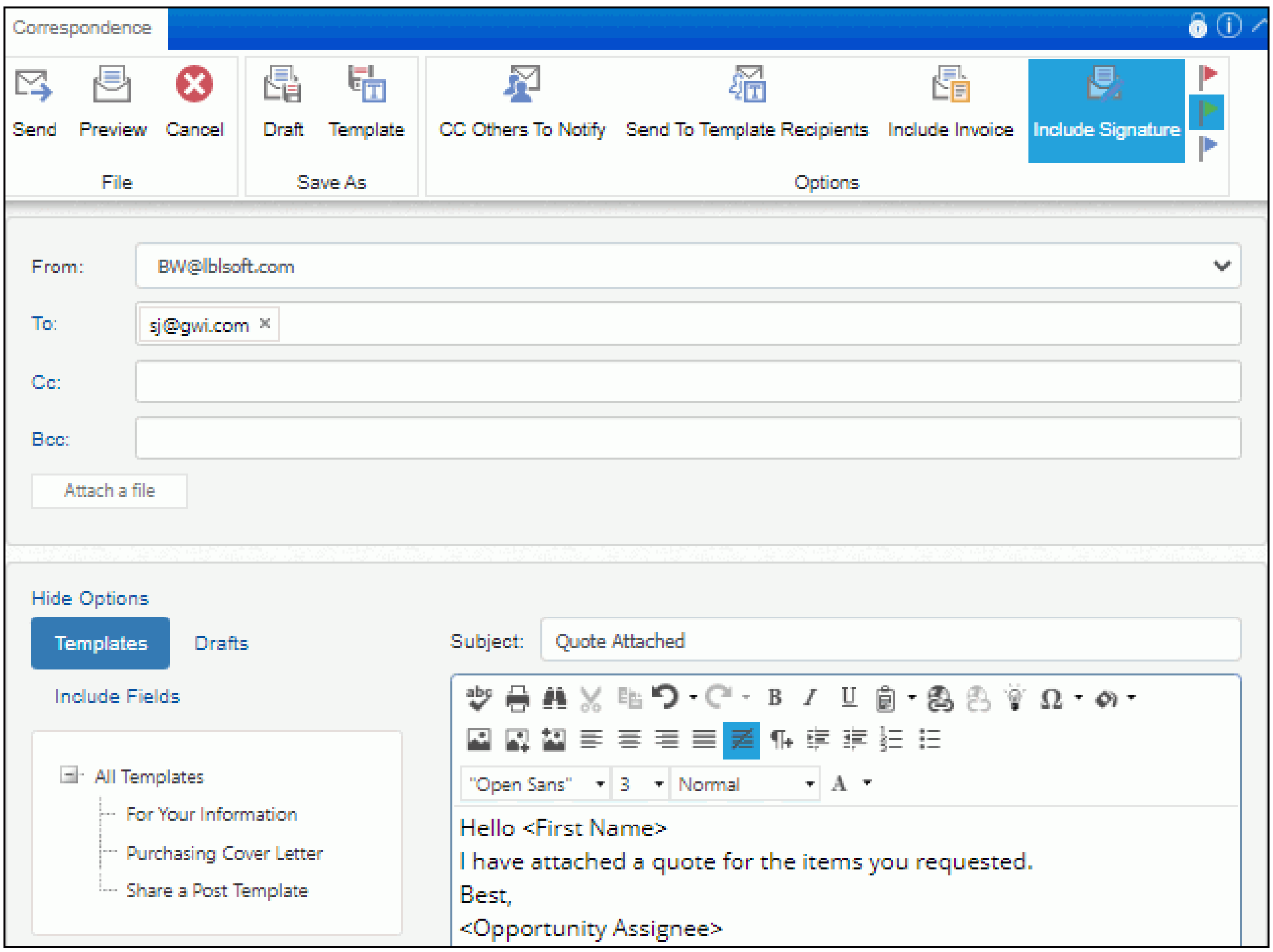
Generating a Quote/Sending Correspondence

To generate a quote PDF using the products selected for the opportunity, select Send Quote. The Select Quote Notes dialog appears; select Yes for each item to include on the quote:

- The text entered in the Comments for Quote field on the Products tab in the Opportunity screen; this text will be included above the total on the quote.
- Notes defined in configuration; these notes will appear after the line item table.



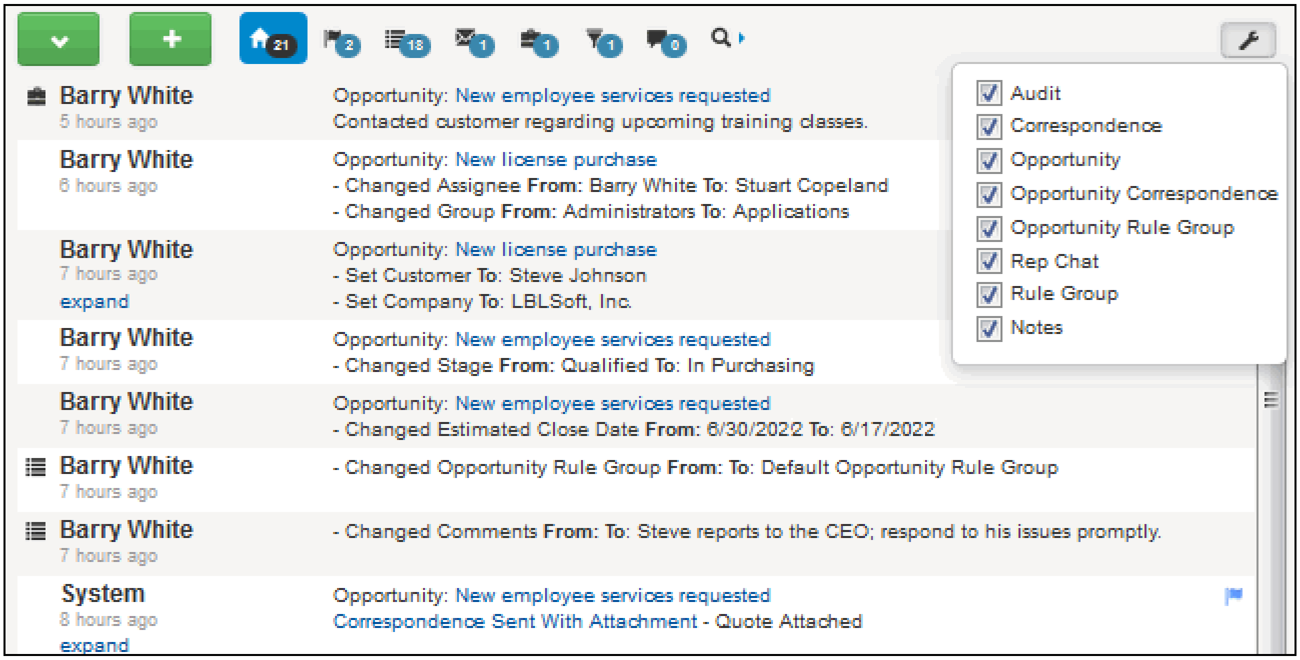
The Correspondence screen appears; fields may be populated via a configured template. If a file is included in the Invoice field, an Include Invoice option will appear in the toolbar for attaching the file. Select Send to send the quote.



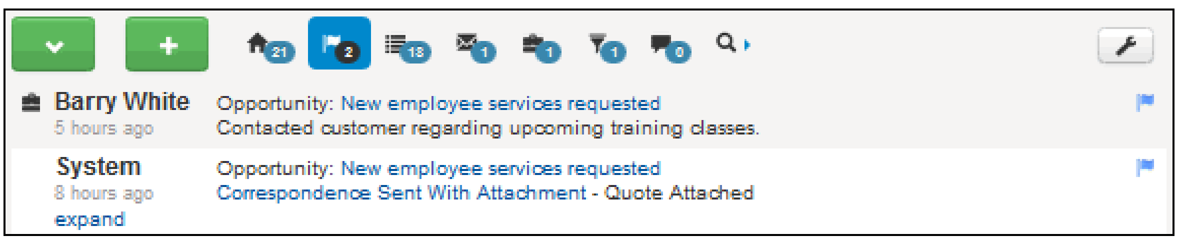
You can use the Reply W/Quote and Reply All W/Quote options to attach a quote while replying to a customer from the same email thread.

Entering Notes and Viewing History

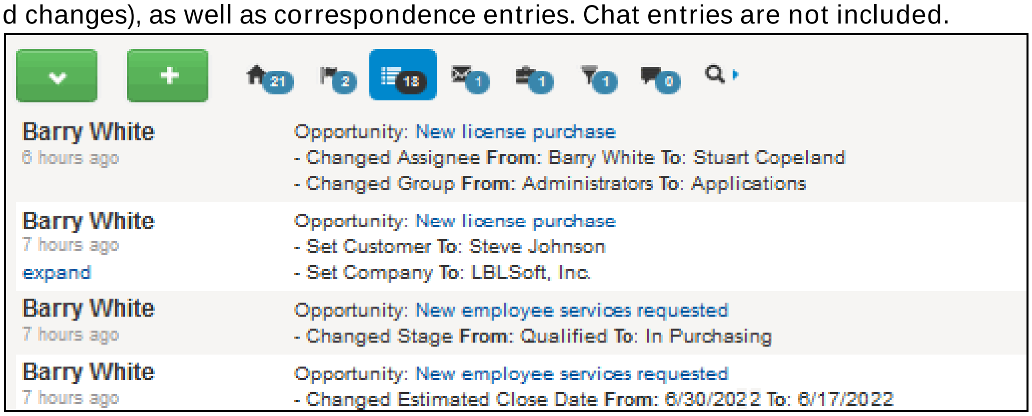
Use the History field to view notations on all opportunity actions, as well as actions on the selected customer's Profile record. You can select Add Note to add any notes regarding the opportunity, and flag note and correspondence entries via the Mark as Important option that appears when you hover over those entries with your cursor. Once marked, the option changes to Unmark as Important for removing the flag.



- The Feed option (above) displays a list of all actions performed on the record and on the selected customer's Profile record; you can filter the content via Settings.
- The Important option displays work history and correspondence entries that have been flagged as important via the Mark as Important option that appears when you hover over note and correspondence entries with your cursor.

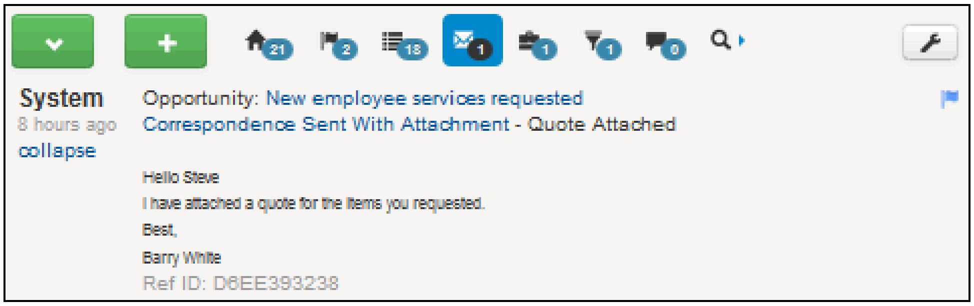


- The Audit option includes entries on functions performed by the system and support representatives (for example, field changes), as well as correspondence entries. Chat entries are not included.

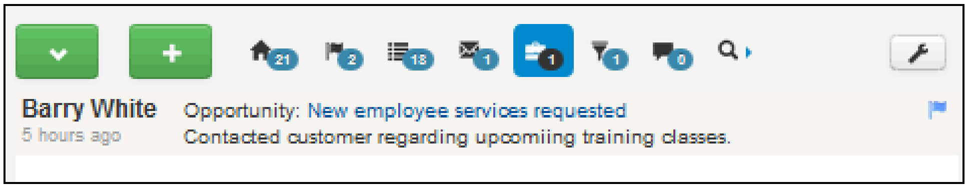


- The Correspondence option displays entries for sent and received correspondence, including the subject line and body of the correspondence, as well as quotes sent from the Opportunity record. The Correspondence

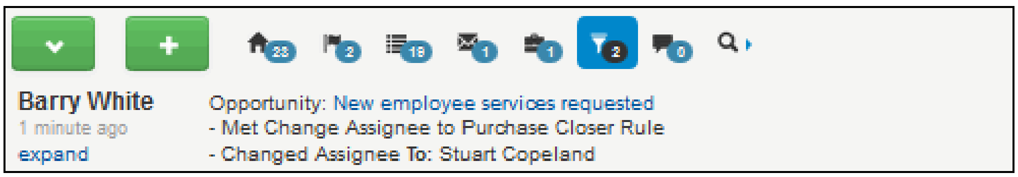
Received and Correspondence Sent links display the Correspondence screen. Note that the Ref ID that appears on expanded correspondence entries is included for reference; it is used by iSupport's email processing engine.



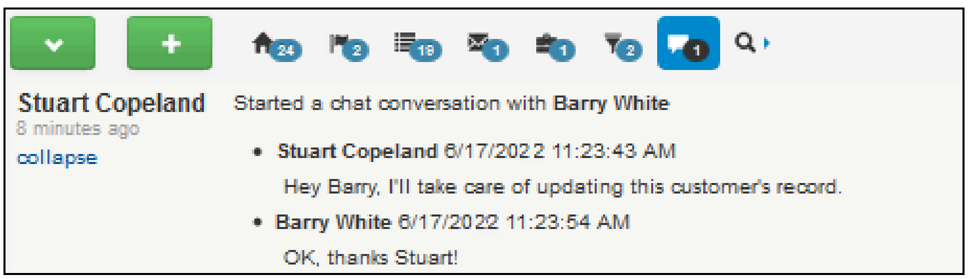
- The Notes option displays entries created via the Add Note icon.



- The Rule Group option displays all rule group events such as when a rule is met and actions taken by rules in the rule group.



- The Chat option displays information on chats initiated via the Awareness feature for the selected customer's Profile record.



- The Search option enables you to enter a search string for searching history entries.