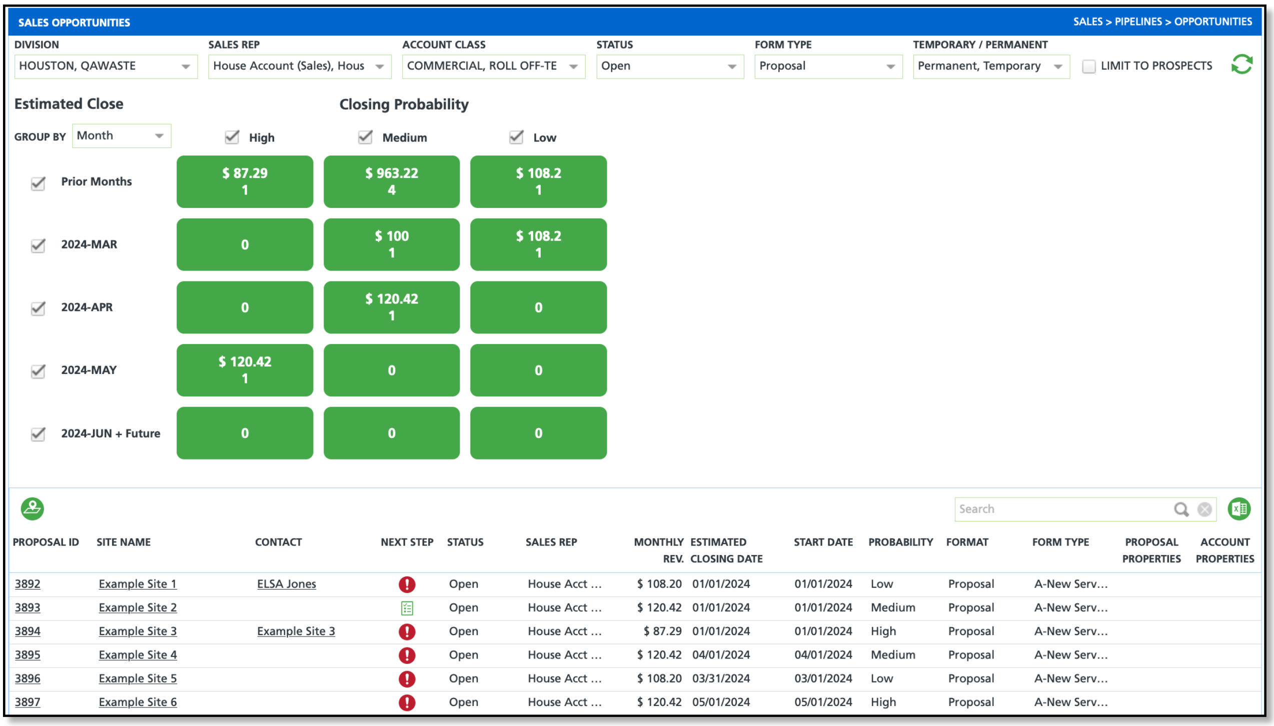
Pipeline Opportunities

Last Modified on 03/19/2024 3:50 pm EDT

Pathway: Sales > Pipelines > Opportunities

The Pipeline Opportunities tool serves as a means to monitor and oversee prospects who have received a proposal and estimate the potential revenue these prospects could generate. Unlike quotes, proposals do not include a signature section.



Permissions

The following permissions are required to view and use the Sales Opportunities screen:

Permission ID	Permission Name
65	User Activities, Leads and Opportunities

Filter Types

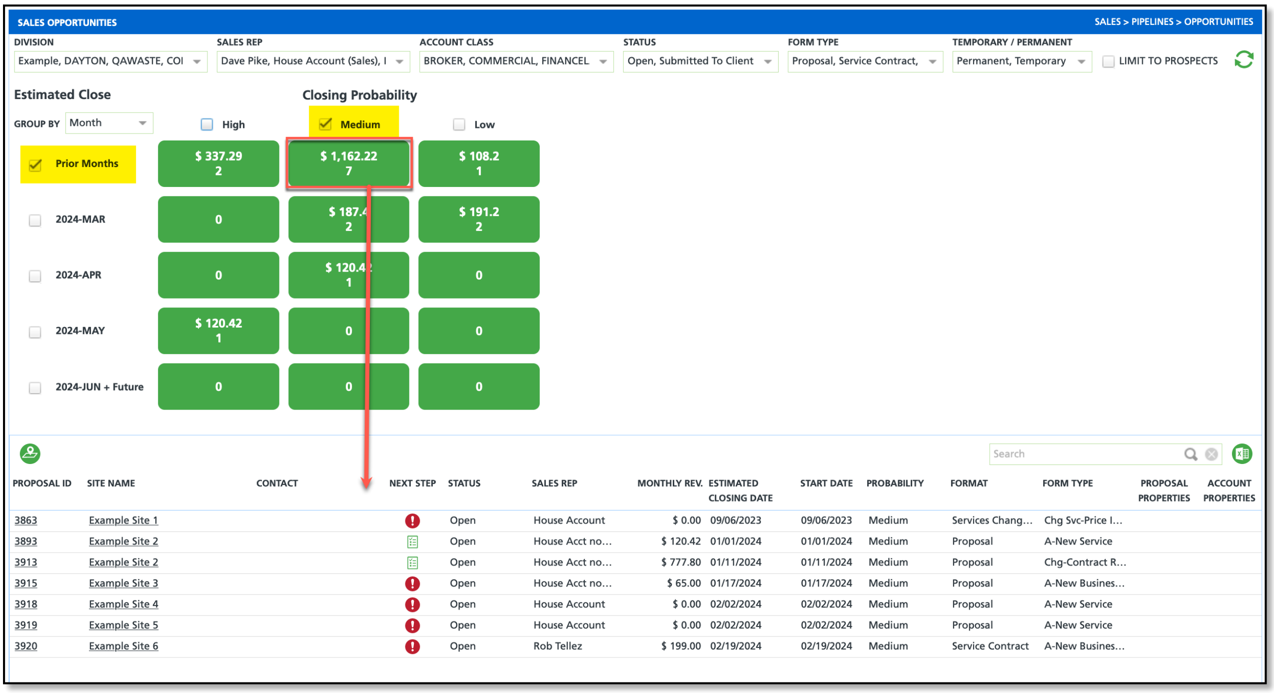
Filtering options are available and narrow down what displays on the screen.

Filter Types	Descriptions
Division	Filters to only display pipeline opportunities based on the division(s) selected.
Sales Rep	Filters to only display proposals associated to the sales representative(s) selected.
Account Class	Filters to only display proposals associated to the account class(es) selected.

Filter Types	Descriptions
Status	Select the proposal type: • Open - Filters to only display proposals with an 'Open' status. • Submitted To Client - Filters to only display proposals with a "Submitted to Client" status.
Form Type	Filters by the Form Type: • Proposal - Filters to display prospect accounts a proposal has been prepared for. • Service Contract - Filters to display accounts that a contract or service agreement has been prepared for. • Service Change Form - Filters to display accounts an order form has been prepared for.
Temporarily/ Permanent	Filters to only display accounts with short term services or accounts that will have an on-going contract.. Short-term is identified by the selected Reason Code when the contract is created.
Limit To Prospects	Filters to only display new prospect accounts. Excludes active accounts that have a proposal for new services.
Refresh (Icon)	Loads/refreshes the screen based on the filters selected.
Estimated Close	Filter the lower grid (proposal details) based on the estimated closing date. Estimated close dates can be grouped by month or quarter. Depending on your selection, the filter check boxes below it will adjust accordingly. Estimated close is identified in the proposal and can be edited in the Estimated Closing Date column within the lower grid.
Closing Probability	Filter the lower grid by the closing probability status: Low, Medium, and High. Closing probability is assigned within the proposal and can be edited in the Probability column within the lower grid.

Understanding Proposal Details Grid

The Pipeline Opportunities grid classifies accounts according to competitor and contract expiration dates, along with the corresponding monthly revenue projections for proposed services. Below the grid, you will find the proposal details for each site. Use the filter check boxes associated with the upper grid to narrow down to a specific set of sites and view their proposal details in the lower grid.



Proposal Details Grid	
Field Descriptions	
Proposal ID	Displays the identification number for the proposal. The proposal ID hyperlinks directly to the proposal to view details.
Site Name	Displays the name of the prospect account.
Contact	If a contact is identified on the proposal, the contact's name will display as a hyperlink in the Contact column. When selected, the 'View Contact' screen screen displays with the contact's information.
Next Step	This column uses icons to quickly identify next steps for the prospect account. Hover over the icon to display a next step popup. • Exclamation Point (red icon) indicates no task or appointment is scheduled. • Task List (green icon) indicates a task or appointment is scheduled. Hover to view a summary of the details.
Sales Rep	Indicates who the sales representative managing the account is. Click within the field to edit and change.
Monthly Rev.	Displays the monthly revenue amount the prospect account would bring in.
Closing Date	The closing date of the external contract or services. Click within the field to edit and change.
Start Date	The targeted start date of contracted services. Click within the field to edit and change.
Probability	The probability or likelihood of closing the sale. Click within the field to edit and change.
Format	The Form Format selected from the Quotes and Contracts section of the prospect account. Formats include: Order Form, Proposal and Service Agreement.

Proposal Details Grid	
Form Type	Indicates the new service proposed, or the change in service.
Proposal Properties	Displays the proposal properties. Hover over the 'eye' icon to view details.
Account Properties	Displays the custom account properties. Hover over the 'eye' icon to view details.