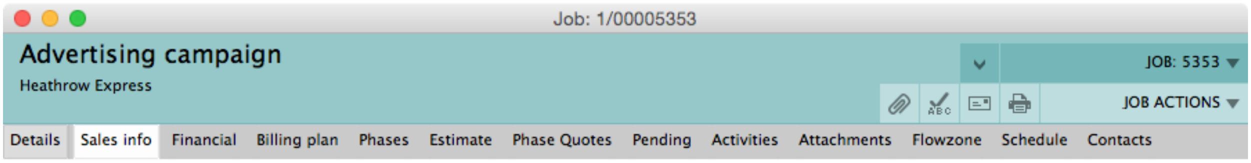
The Sales Info Tab

There are many tabs within a Synergist Opportunity or Job. This spotlight focuses on the **'Sales Info'** tab. Optional use of this tab could really enhance your Organisations ability to utilise Synergist to **forecast New Business** with either existing or potential Clients (Prospects).

Sales Info tab detail

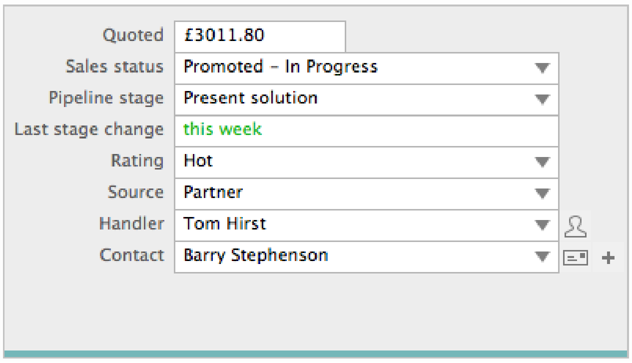
This tab is auto created on all jobs or opportunities. Data on this tab is optional to fill in and will not effect the progression of the job but is essential for enhanced new business reporting.

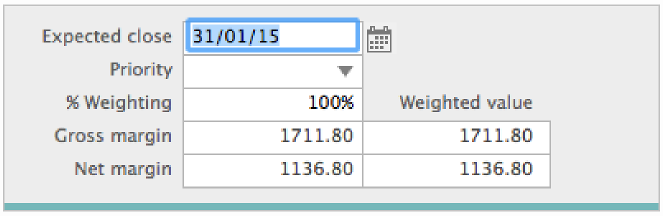


The key fields on the Sales info tab are as follows:

Key Fields	**Definition**
Quoted Value	The quote is the expected value of the work quoted for. This could be estimated and quoted in detail or just a "guestimate' value entered as a one line total.
Rating	Bespoke field rating how good or likely an Opportunity is to be won. E.g. Cold, Warm, Hot
Expected Close date	Key for forecasting when an opportunity is likely to be won. This can be regularly updated.
Source	Where did this Opportunity come from? Good for tracking the impact of marketing.

The following fields are also available within the sales info tab. These are all optional to use. Some Organisations may select to use some of these.





Additional Sales Info Fields	**Definition**
Sales Status	Defaults Sales status but useful for adding reasons for loss. **Open** - Quote status jobs **Promoted** – Live status jobs **Lost** – Opportunities that have been ‘written off’
Pipeline stage	Bespoke field for tracking where within the sales pipeline an opportunity is. E.g. Initial discussions, Proposal, awaiting PO.
Priority	Bespoke field to mark an opportunity as being within a hierarchy of priority. E.g. 1- 9
% Weighting	A common tool for applying a percentage to a quoted value so that you can forecast the value based on the likelihood that an opportunity will be won.

Recommended use for New Business Forecasting

The minimum data required would be to open up an opportunity for each enquiry or potential job. Within the opportunity there should be a **Sales Expected close date** and a **quoted value**. **Rating** could also be simple to update.

1. **Only use a selection of the Sales info tab fields.** Although it would be great to have such a level of detail, start off with a simple amount of data and build on this once usage has become routine and data is reliable.

2. **Ensure that Users set an Opportunity view setting.** Each handler or owner should set a view filtered by him or herself or team so that they can easily keep track of opportunities.

3. **Update key fields on a weekly or monthly basis.** Generating regular reports will encourage users to keep fields updated.

Further detail

Rating – This field is displayed as a column within the opportunities screen and is defaulted to cold, warm, hot. However these can be changed within the file maintenance area of Synergist. (This area is often restricted)

Other examples of ratings used include:

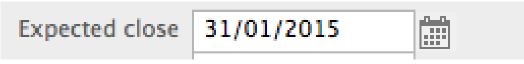
- Bronze, Silver, Gold
- Red, Amber, Green
- A, B , C

Examples of use for ratings:

1. An Opportunity screen view could be set to show 'Hot Opportunities'

2. A Data Viewer report could be run and filtered by ratings i.e. Hot Opportunities

Expected Close date

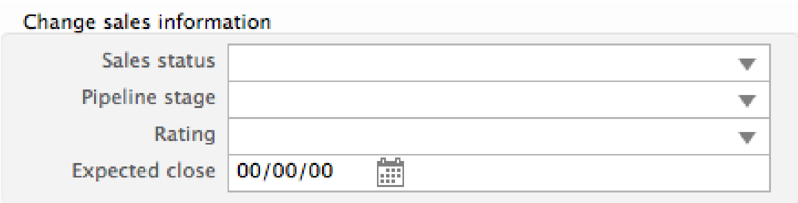


This date is displayed on the Job/Opp Details tab as well as on the Sales Info Tab. It can be updated from either tab. This date should indicate when an opportunity is likely to be 'won' or the go ahead given. This date should constantly be updated until the Opportunity is either **Won** (Promoted to Live) or **Lost** (deadened).

Batch Update Facility

A useful tool that can batch update a number of opportunities in one transaction. For example, to update expected close dates, sales status, pipeline stage or rating

1. Go to Opportunities
2. Select multiple opportunities to be updated
3. Then click 'actions', then select 'Batch update'.
4. Choose the details that you wish to update for the group of selected jobs .i.e. change the expected close date, rating, pipeline stage etc.



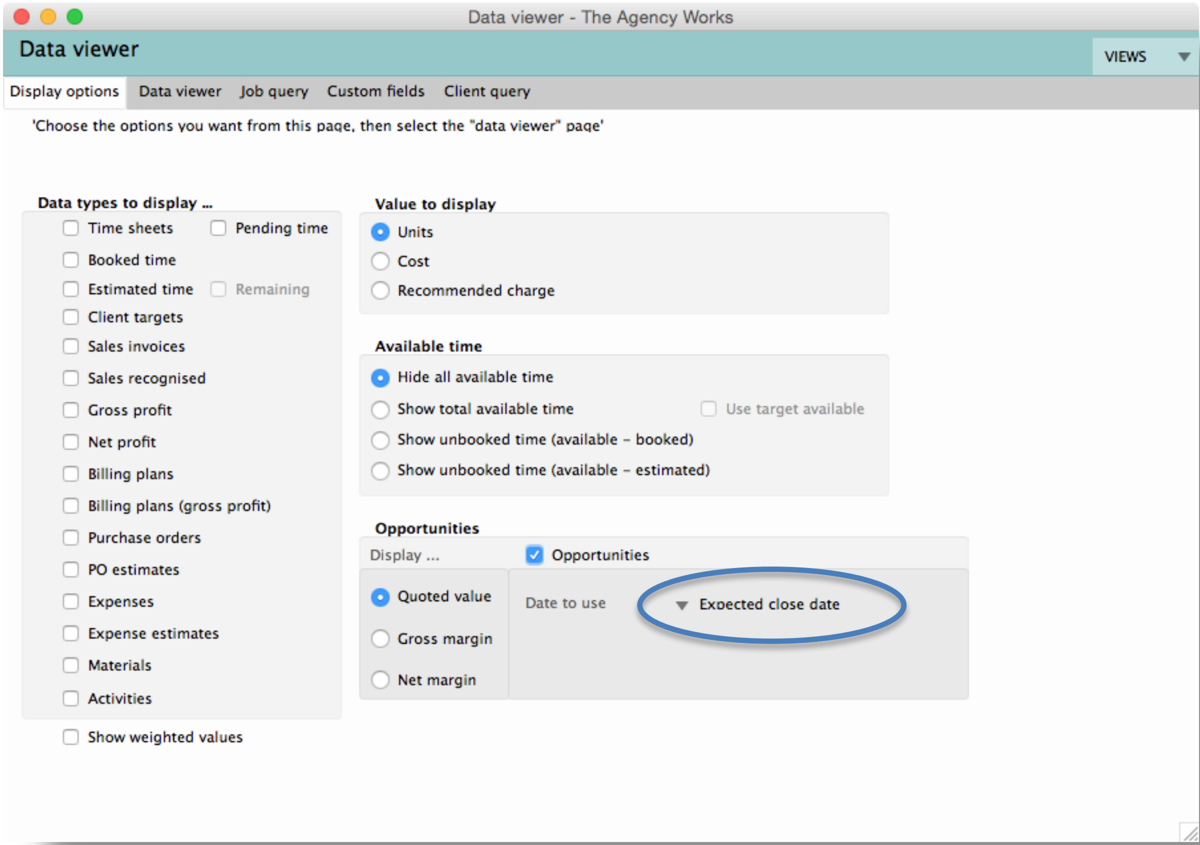
Reporting

Sales Info reports using the Data Viewer

Access the Data Viewer from the main **Reports** toolbar menu, and then click on the **Data Viewer** icon.

1. The **'Display Options tab'**

This tab lists the tables that can be reported on using Data viewer with a specific section relating to opportunities. Tick the check box in the opportunities section to display opportunities.

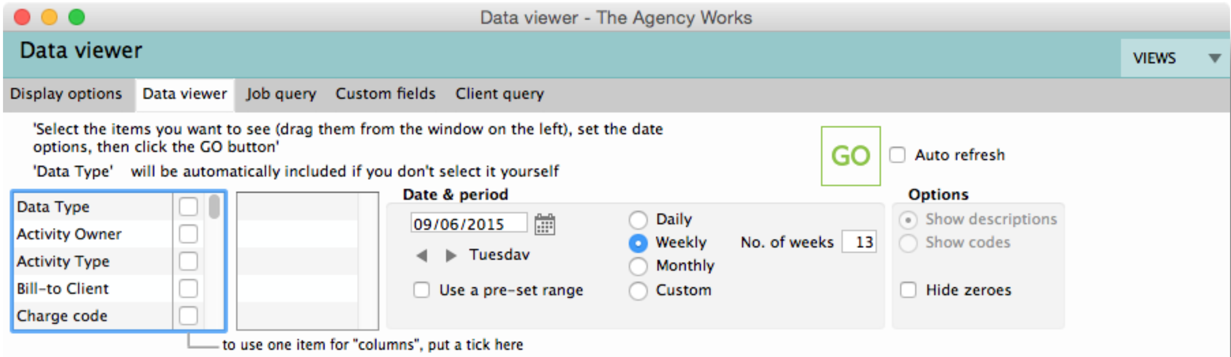


- **Opportunities**
  You have the option to report on data for opportunities relating to quoted value, gross margin or net margin. In addition, you are able to choose from a range of relevant dates. E.g. To report on when opportunities may be won, select "expected close date".

2. The **Data Viewer** tab

The data Cutter

- Select how you want to "cut" or "format" the data. Drag Client or Opportunity status from the left hand list of tables & fields into the selection box.
- The order that these criteria are listed in will affect how the data is summarized. E.g., Client above Opportunity Status to have data ordered primarily by Client.



The date Range & period

- Select a date range by selecting a start date and whether you want to view the resulting data by day, week or month.
- The number of days/weeks/months can be entered here. E.g., start date 1/8/2013 with 12 monthly columns would produce data for the year.

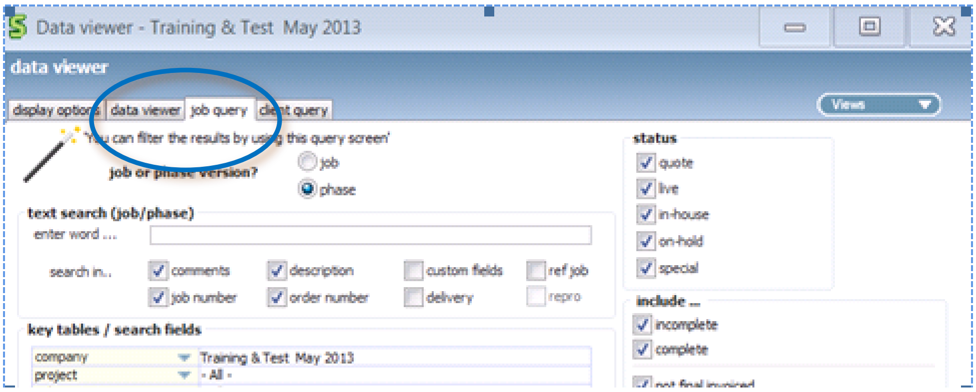
1. The **job query** tab

The selection criteria tab is used to filter which data is displayed in the view. Multiple criteria can be applied. All records are displayed unless filtered.

- Include quote/live/in-house Jobs
- Include/exclude completed/final invoiced Jobs
- Filter by Job type, account handler
- Filter by internal or external Client

2. The **Client Query** tab

This tab is used to further filter the resulting records, based on Client fields. This is particularly useful if you are creating a view of data related sales and marketing forecasts, etc. Or if you are only interested in data for a single or set of specific Client



Views

3. Once you have selected the rows and columns, filters, date ranges, etc. you can save your selected settings to a view. Different types of views are possible to create:

- **User Views:** Only visible when you are logged on as yourself.
- **Group Views:** New in v10.5 to be able to save a report for a group of 'Account Handlers' or 'Management' for example.
- **Company Views:** An administrator has the rights to save Company views.

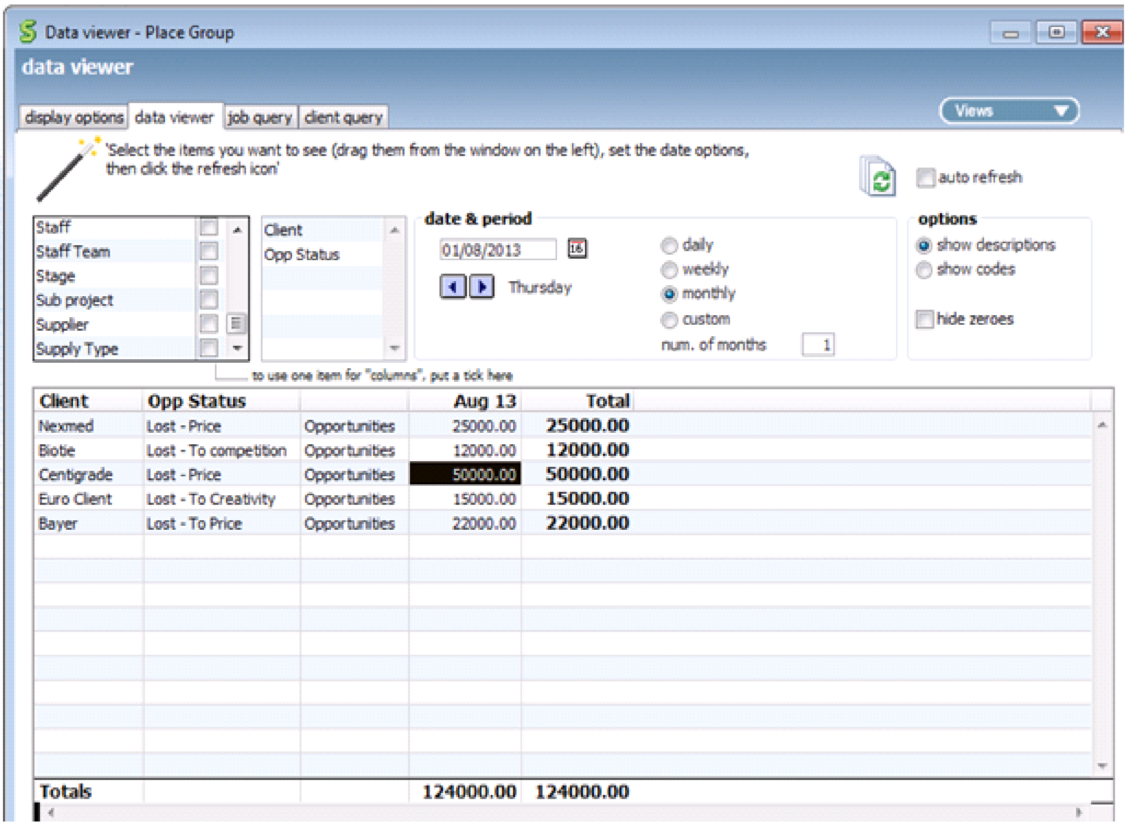
Example New Business Reports using the Data viewer

These are some useful examples of how flexible the data viewer can be when reporting. All of these could be saved as User, Group or Company views.

- Report on lost opportunities within a month showing the reasons that they were lost and the quoted value.

To create this report:

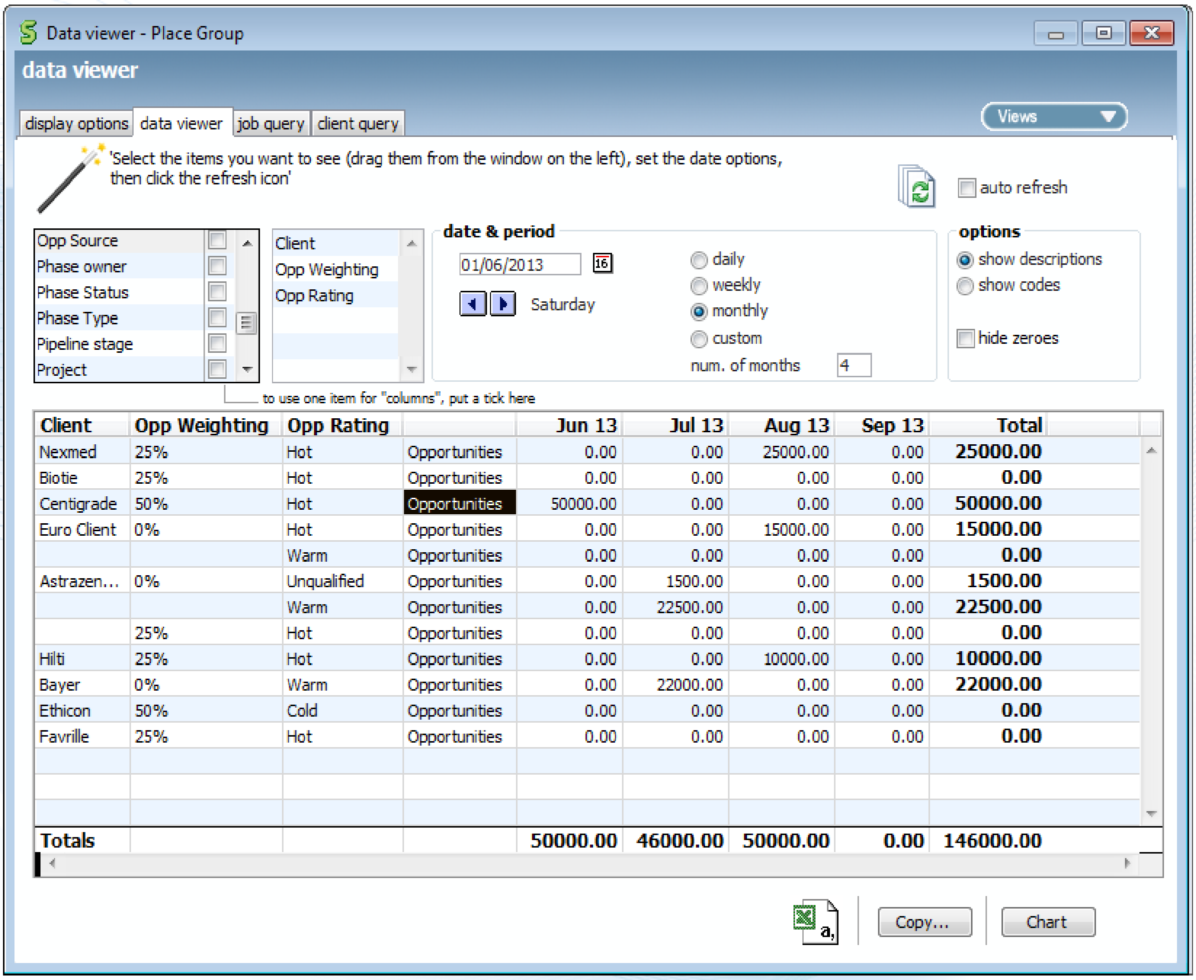
1. On the display options tab select opportunities based on lost date
2. From the data viewer tab select client and opp status
3. Enter the start date for the date range, select monthly and enter the number of months required.



- Report on opportunities to include rating, % weighting for a four month period.

To create this report:

1. On the display options tab select opportunities based on expected close date
2. From the data viewer tab select client, opp weighting and opp rating.
3. Enter the start date for the date range, select monthly and enter the number of months required.



Client	Opp Weighting	Opp Rating		Jun 13	Jul 13	Aug 13	Sep 13	Total
Nexmed	25%	Hot	Opportunities	0.00	0.00	25000.00	0.00	25000.00
Biotie	25%	Hot	Opportunities	0.00	0.00	0.00	0.00	0.00
Centigrade	50%	Hot	Opportunities	50000.00	0.00	0.00	0.00	50000.00
Euro Client	0%	Hot	Opportunities	0.00	0.00	15000.00	0.00	15000.00
		Warm	Opportunities	0.00	0.00	0.00	0.00	0.00
Astrazen...	0%	Unqualified	Opportunities	0.00	1500.00	0.00	0.00	1500.00
		Warm	Opportunities	0.00	22500.00	0.00	0.00	22500.00
	25%	Hot	Opportunities	0.00	0.00	0.00	0.00	0.00
Hilti	25%	Hot	Opportunities	0.00	0.00	10000.00	0.00	10000.00
Bayer	0%	Warm	Opportunities	0.00	22000.00	0.00	0.00	22000.00
Ethicon	50%	Cold	Opportunities	0.00	0.00	0.00	0.00	0.00
Favrille	25%	Hot	Opportunities	0.00	0.00	0.00	0.00	0.00
Totals				50000.00	46000.00	50000.00	0.00	146000.00