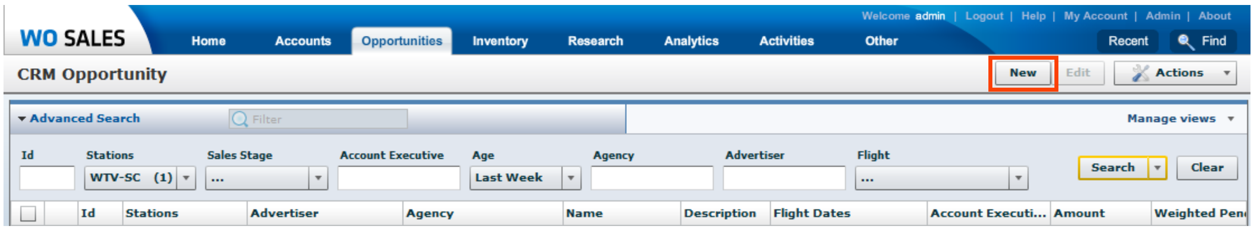
WO CRM Opportunity

Creating an Opportunity in *WO CRM* allows you to track business as it moves through the sales process. Revenue established in an Opportunity can be used in Sales Reports and seen in the charts on the Dashboard.

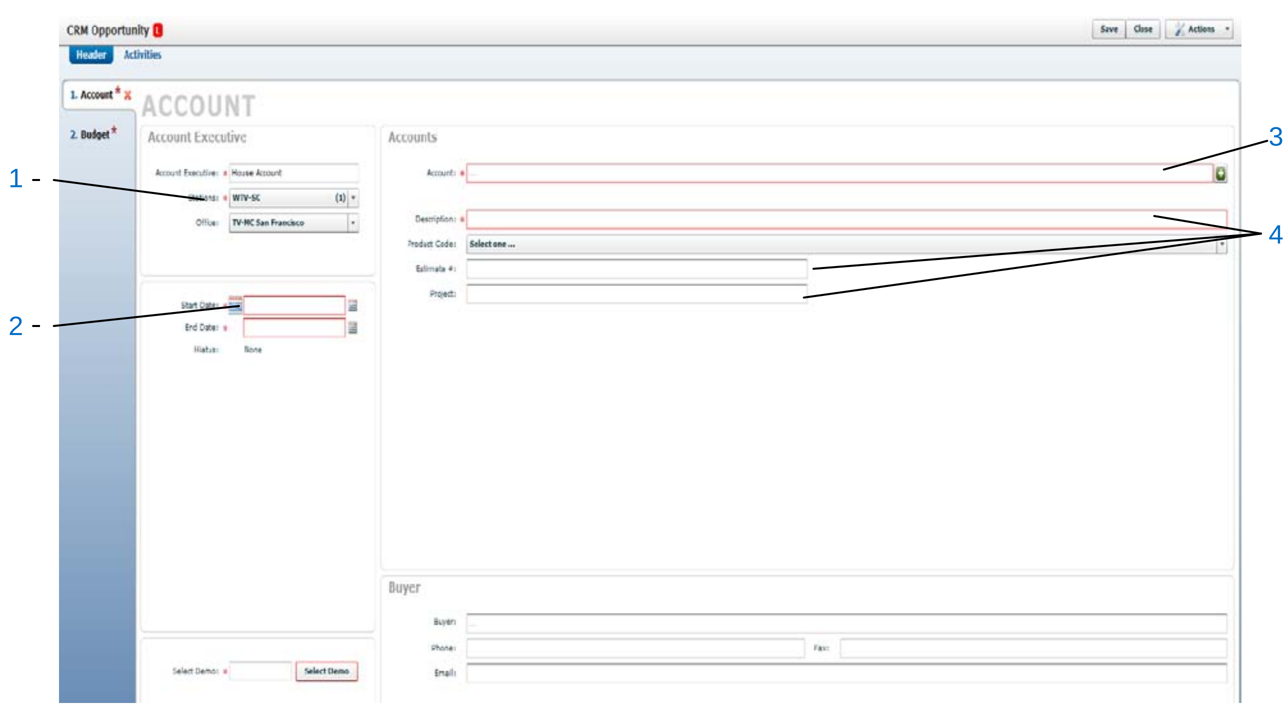
Creating

- An Opportunity can be created by selecting **CRM Opportunity** from the Opportunities menu and then clicking the **New** button on the top right of the screen.



- Fill out the Opportunity information noting the required fields labeled with a Red Asterisk*.
- The Opportunity form contains two tabs; **Header** and **Activities**.
    - The Header tab is further broken down into two sections; **Account** and **Budget**.

Header/Account section



1. Select one or multiple **Stations;** a single Opportunity can be used to place pending business on multiple stations at once.

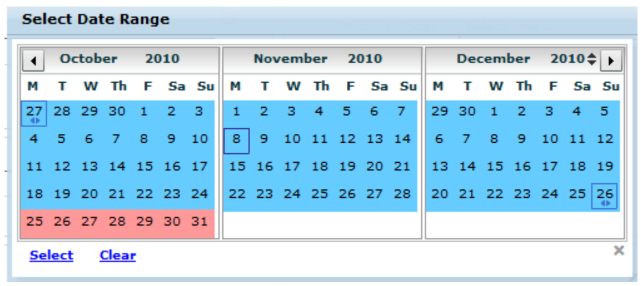
Account section (continued) –

2. Flight and Hiatus Dates can be assigned using the two calendar options available.

The small calendars to the right allow you to select a specific date.

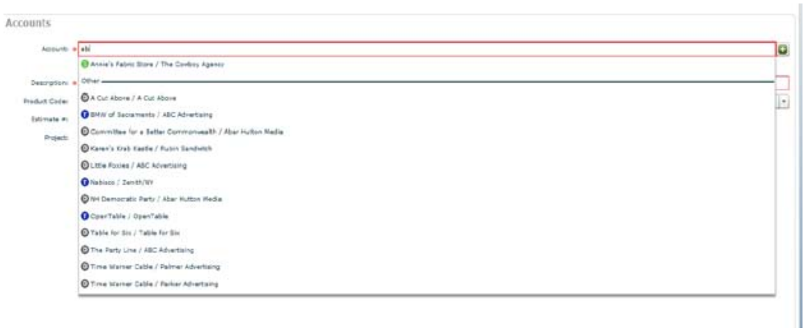
Use the large calendar on the left to select a range of dates.

- Drag your cursor to select dates.
- Active dates are highlighted in blue.
- Drag over selected dates a second time to select Hiatus dates which will be highlighted in red.



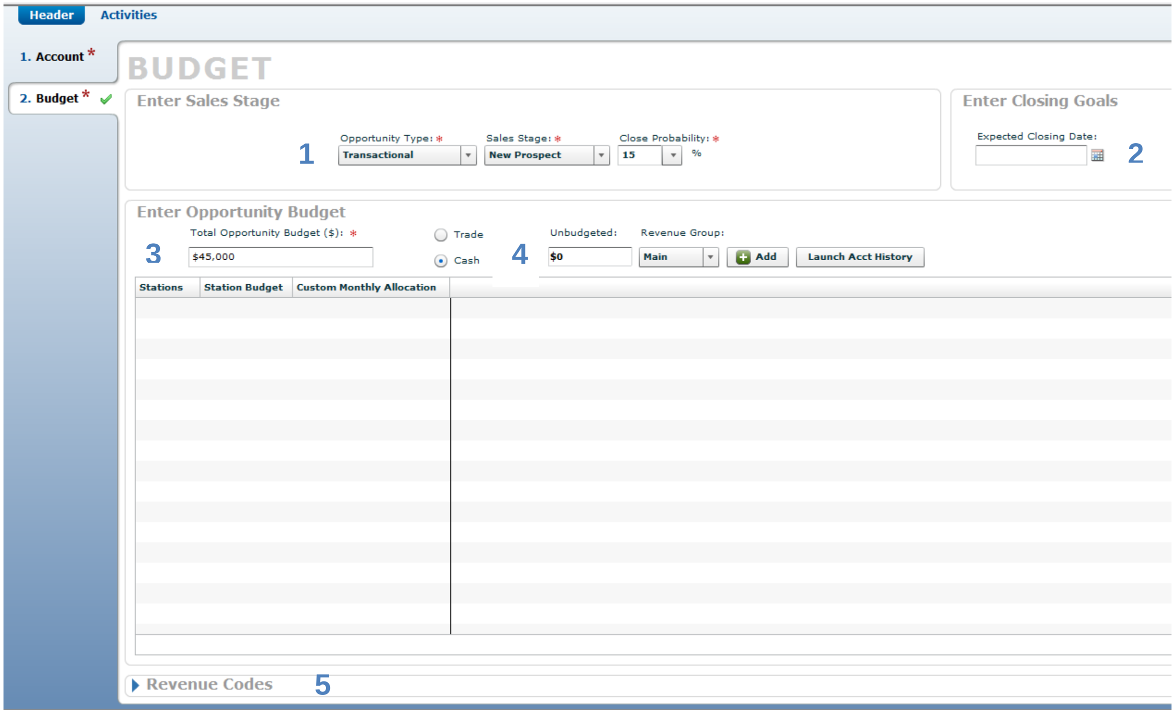
3. When entering an Advertiser, type in any letter or number in the field and the system will produce a predictive text list allowing you to select an established item. If an agency, buyer or demo is associated with the account, these will autopopulate. You can also create a new account on the fly by clicking the .

- The Advertiser and Agency lists contain icons indicating if an account exists in *WO Sales* only or if it has been established in *WO Traffic* as well.
- **Dormant** accounts will also be listed in the list with a grey D.
- Any account listed below the line in Other is an account that belongs to another Account Executive.



4. The **Description** is a required free-text field that can contain a client submitted title, a Promotion name, etc. The **Estimate #** field is optional. Any data entered here will be carried over to the converted Avail/Proposal. The **Project** field is also optional and provides the ability to categorize opportunities for special station or corporate initiatives.

Header/Budget section



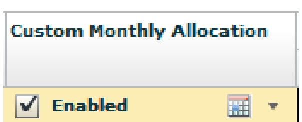
1. The Budget section offers a field to select the **Opportunity Type** and a **Sales Stage**. Each Sales Stage has an assigned **Close Probability** percentage which reflects how close you are to realistically closing the business. This percentage is used in calculating weighted pending totals in Sales Reports. The percentage number can be changed by simply typing over the existing number.

Note: It is important to maintain the Sales Stage because it allows you to accurately track revenue as the Opportunity moves from Prospect to Closed.

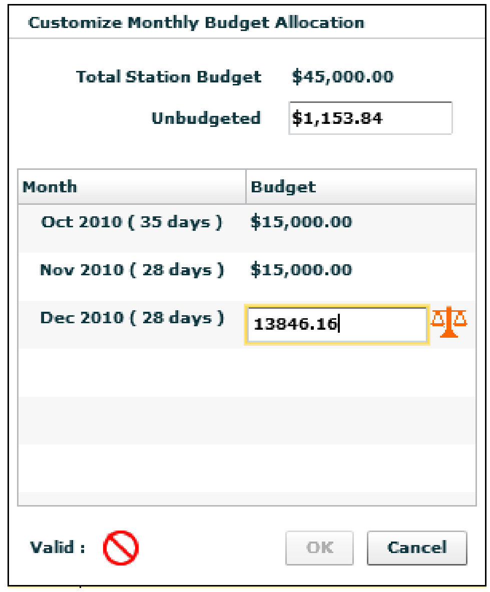
2. There is a field for an **Expected Closing Date.** This is a good visual tool to use as a reminder.

3. Enter the Opportunity dollar total **for the station** in the Total **Opportunity Budget** field.
   - The total amount will be evenly distributed across all selected stations when multiple are present.
   - The system evenly distributes dollars across months based on number of days in each month.
   - When a flight encompasses multiple months set a custom distribution by checking the **Disabled** box in the **Custom Monthly Allocation** column.

   - Click the calendar icon next to Enabled to open a secondary window.



Budget section (continued) –



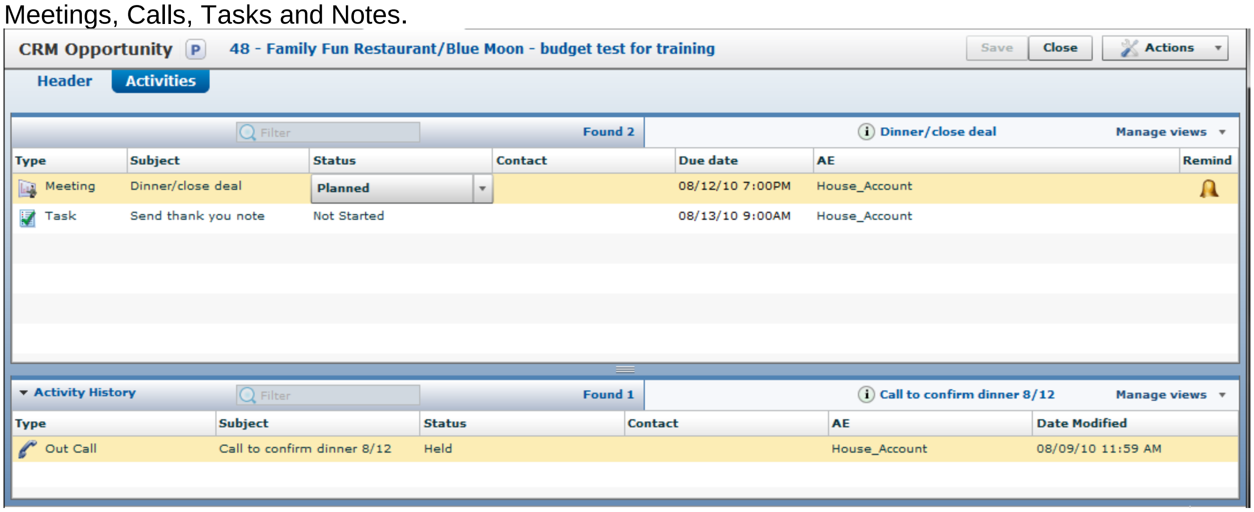
Customize Monthly Budget Allocation window →

- Click in the budget column for any month and enter a new total.
- Dollars not assigned to a month will appear in the **Unbudgeted** field at the top of the window.
- Enter custom dollar amounts for each month, or click the **Scale** icon next to a month to assign the balance of unbudgeted dollars to that month.
- Click **Ok** to save the changes and exit the window. Click **Cancel** to close the window without saving the changes.

4. **Revenue Groups** are Management defined categories used to track different revenue streams. All dollars must be assigned to one or more Revenue Groups in each Opportunity.
   - The system assigns all new Opportunity dollars to your station's core or main group.
   - To add Revenue Groups, select from the pull down menu and click the **Add** button.
   - Enter a percentage or dollar amount for each group and the system will update the totals.
   - Click the **Minus** icon in a Revenue Group column to remove it from the current Opportunity.
   - **Launch Account History** will show the *WO Traffic* **Account History** for established clients. This *WO Traffic* report can be a helpful research tool when pitching business to an established client.

5. **Revenue Codes** are associated with the Account and can be changed by clicking on the arrow next to the Revenue Code and changing the code in the drop down box.

Activities - The Activities tab displays a log of all activities associated with this Opportunity including Meetings, Calls, Tasks and Notes.



- Create Meetings, Calls or Tasks in Outlook and associate them to the specific Opportunity using the Outlook Relations Editor.
- Create Meetings, Calls, Tasks and Notes from the *WO CRM* Activities menu and associate to the appropriate Opportunity.
- Create Activities directly from inside an Opportunity using the **Actions** menu.
- Double click on an item from the Activities tab to open and view/edit the details.
- Edit **Status** or change **Reminder** settings directly from the Activities tab.

Managing

- The main CRM Opportunity screen is a search screen listing all Opportunities in the system.
- Utilize filters to narrow the list and sorting options to easily locate Opportunities you wish to view.
- Icons on each line indicate which Sales Stage an Opportunity is in.
- Double click to open and view any Opportunity.
- Select an Opportunity using the select checkbox and click the Edit button at the top of the screen to open and edit for changes.
- The **Actions** menu contains several options
    - Select an Opportunity and click **Duplicate** to create an editable copy.
    - Select one or more Opportunities and click **Delete** to remove them from the system.
    - Change the Sales Stage of an Opportunity without having to open it.
    - **Mark as Order** to effectively remove the revenue from the pending pipeline and mark it as a processed order in the system. *Note: Once marked as an order an Opportunity cannot be edited or deleted from the system.*

Home Page

- Quickly create an Opportunity using the **Shortcut** on the Home page.
- Opportunities can be seen listed in the Opportunities **Dashlet** on the Home Page.
    - Click through on an Opportunity in the Dashlet to open it in a full-screen view.