Tracking sales information and revenue

Business can be tracked in *WO Sales* as it advances from first contact with a potential client to a closed sale. A suggested workflow would be to create a Contact in *WO Sales* or Outlook for a new client. Tasks, Meetings, and Calls can be scheduled through the Contact record or Outlook then viewed through *WO Sales*. As positive business developments occur, an Opportunity is created in *WO Sales* and can be associated with the Contact. Progression of the Opportunity is tracked via the Pipeline report based on various Sales Stages set throughout the lifespan of the Opportunity. Maintaining the Sales Stage allows you to accurately track revenue as the Opportunity moves from Prospect to Closed.

Contact

Utilizing the tools available within Contacts allows you to evaluate and follow business as it develops.

- Contacts are created in *WO Sales* or Outlook then optionally synchronized between applications.
- Within a *WO Sales* Contact record you can Create Tasks, Schedule Meetings, Schedule Calls and Compose Emails.
- Emails, Calendar events and Tasks can be created in Outlook and synchronized with *WO Sales*.
- All activity and history associated with a Contact can be viewed in each individual contact screen.

Opportunity/Avail/Proposal

- Opportunities can be created in *WO Sales* via the Opportunities menu or from within a Contact.
  - Creating an Opportunity from Inside a Contact will automatically associate the Opportunity to the Contact.
  - Within an Opportunity it is required to select a Sales Stage; Prospect, Avail, Proposal, Negotiation, Closed/Won or Closed/Lost.

Note: Maintaining the Sales Stage process allows accurate tracking of revenue as an Opportunity moves from Prospect to Closed.

- The Sales Stage is maintained via the Actions Menu from within an Avail or Proposal or from the Avails and Proposals search screen. *(Figure 1)*
- Set the Sales Stage and the Closing Probability and then track the business through the Pipeline Report on the Dashboard. *(Figure 2)*

Note: An Avail or Proposal can be Marked as an Order via the Actions menu if a WO Traffic order is created separately from the WO Sales system. Marking as Order removes revenue from the pending Pipeline.

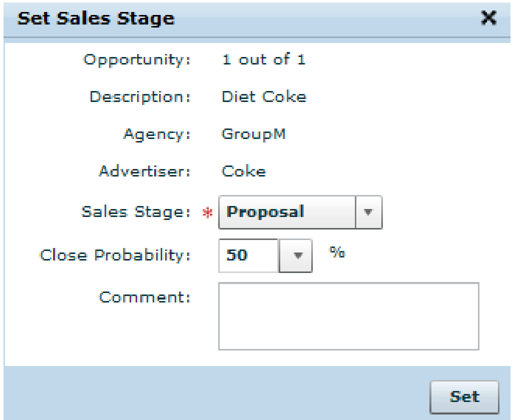

Figure 1

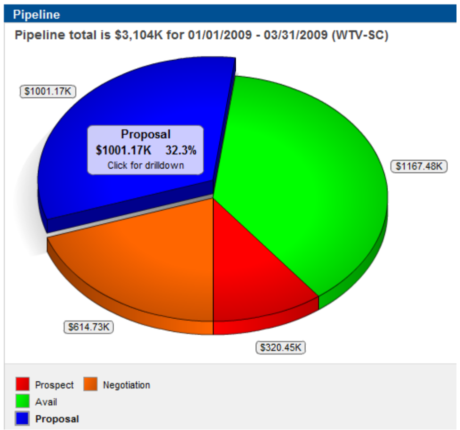

Figure 2

Pipeline

- The Pipeline report is located under the Home menu on the Dashboard page. The Pipeline tab displays real-time revenue information displayed on customizable Dashlets in Pie-chart or Bar-graph form with drill down capabilities. Edit the Pipeline dashlet to view the chart by Account Executive or Sales Stage.
  - Clicking on a pie section or bar will take you to the Opportunity list which will be filtered to display only the Opportunities constituting that section of the chart/graph.