Opportunities with Synergy
Sales Opportunities

1. Create Sales Opportunity Cards Manually with Process Flow Templates

2. Create Sales Opportunity Card from:
   a) Sales Quote (No Process Flow)
   b) Workflow Request (No Process Flow)
   c) Importing from an Excel Spreadsheet (with Process Flows)

3. Create Workflow to Showcase Opportunities Data
   a) Single Request
   b) Multiple Requests (Workflow Process)
Manually Create Opportunities

✓ Create Sales Opportunities from Workspace or Account Card.

✓ Process Flow Templates are Created Automatically with Stage Workflow Requests

✓ Minimal Information Required
Opportunity Card

Opportunity card: Op6, Deal: Undecided / Stage: Product Demonstration

Sales
- code: ops
- Description: Steel Sales
- Account: Mike O'Kane
- Contact: Sally George
- Owner: Jack McLean
- Project
- Currency: USD - US Dollar
- Planned amount: USD 50,000.00
- Sales cycle: Six Stage Sales Process

General
- End date: 11/27/2014
- Source: Internet

Competition
- Company: Corporation
- Type: Supplier

Free fields
- Date: 11/16/2016
- Opportunity 0
- Documents
- Projects
- Workflow

Sales cycle history
- Planned amount

Opportunity history
- Deal: Undecided
  - Stage: Product Demonstration
  - Planned amount: 50,000.00
  - Probability (%): 20
- Deal: Undecided
  - Stage: Needs Analysis
  - Planned amount: 50,000.00
  - Probability (%): 20
- Deal: Undecided
  - Stage: Quality Lead
  - Planned amount: 50,000.00
  - Probability (%): 20

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GLM Systems
Fast. Smart. Exact.
Manually Create Opportunities (Pluses)

✓ If Your Business Uses a Linear Process for Your Sales Quotation and Follow-Up, Then this method may be the correct choice.

✓ Opportunities have pre-defined reporting through Synergy

✓ Information can be easily viewed from Account Card (Competition, Items)

✓ Opportunity Card Created with Pre-Defined Workflows
Manually Create Opportunities (Minuses)

✓ This method really requires a linear sales process and does not allow changes to be made easily. You must complete each Step, even if Not Required.

✓ If the Sales Process is short-term from quote to order, look at other options or use less stages (such as 2).
Auto Create Opportunity

✓ Automatically Creating a Sales Opportunity in Synergy will allow an Organization to Track the Quantity and Dollars of Potential Orders that Could be Generated as Sales.

✓ Using Microsoft SQL Reporting Services (SSRS), Reports can be Generated on each Account Card, Highlighting the Opportunity Activities.

✓ An Opportunity Card is Created for Each Individual Opportunity.

✓ Import from Excel Spreadsheet from Lead Gathering Sources.
Auto Create Opportunity (Pluses)

- If Your Business Uses a Non Linear Process for Your Sales Quotation and Follow-Up, This method may be the correct choice.
- Opportunities have pre-defined reporting through Synergy
- Information can be easily viewed from Account Card (Competition, Items)
- Opportunity Card Created with Pre-Defined Workflows (If Needed, From Event Manager Tasks)
Auto Create Opportunity (Minuses)

✓ No Workflow Process is defined by Creation of Opportunity. They can be Created Using the Event Manager, if Required.

✓ If Imported from an Excel spreadsheet, the Workflow Process is automatically created.
Workflow Opportunity

✓ This method uses information on a workflow request to track potential sales volume and sales steps.

✓ Quotes do not have to be Created.

✓ Using Microsoft SQL Reporting Services (SSRS), Reports can be Generated on each Account, Highlighting the Prospecting (Quoting) Activity based upon a separate workflow process.

✓ Projects may be added onto the Workflow Request.
Workflow Opportunities
Workflow Opportunity (Pluses)

✓ This method relies on workflow requests to capture information such as dollar values and statuses.

✓ Quotes can be created inside or outside of ERP Systems. These may be as simple as a word or excel document presented to a prospect.

✓ Simplicity of the Process makes it easy to track quotes by whatever means.
Workflow Opportunity  (Minuses)

✓ This method requires customized reports and workflow requests to be able to monitor statuses and sales potential.

✓ No Specific Opportunity Card Used
Screen Shots

The following screens are displayed from Synergy Opportunities
Home Page with Hyperlinks
## Opportunity Pivot Analysis List

### Opportunities: Pivot analysis

<table>
<thead>
<tr>
<th>Account Name</th>
<th>Stage</th>
<th>Owner</th>
<th>Follow-up Date</th>
<th>Row</th>
<th>Account, State</th>
<th>Top</th>
<th>Title</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
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</table>

**Total:** 55

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**Notes:**

- The pivot analysis provides a comprehensive view of opportunities by stage, account, and state.
- The follow-up date field helps track the progress of opportunities.
- The top row of the table lists the account names for easy cross-referencing.

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**Contact:**

- [SynergyExpert.com](https://www.synergyexpert.com)
- [GLM Systems](https://www.glm-systems.com)
- [EXACT](https://www.exact.com)
### Opportunity List

#### Opportunities

<table>
<thead>
<tr>
<th>Opportunity ID</th>
<th>Opportunity Name</th>
<th>Account/Email</th>
<th>Opportunity Stage</th>
<th>Opportunity Sales Cycle</th>
<th>Last Updated</th>
</tr>
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<tbody>
<tr>
<td>My Opportunity 11ABC</td>
<td>Project 1 Description</td>
<td>Bike O'rama</td>
<td>1 - Qualify Lead</td>
<td>Six Stage Sales Process</td>
<td>05/10/2016</td>
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<tr>
<td>Opp64</td>
<td>opportunity 1</td>
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<td>2 - Needs Analysis</td>
<td>Six Stage Sales Process</td>
<td>05/02/2016</td>
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<tr>
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<td>Bike O'rama</td>
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<td>Six Stage Sales Process</td>
<td>05/03/2016</td>
</tr>
<tr>
<td>Opp66</td>
<td>Test Impact</td>
<td>Bike O'rama</td>
<td>1 - Qualify Lead</td>
<td>Six Stage Sales Process</td>
<td>05/03/2016</td>
</tr>
<tr>
<td>Opp67</td>
<td>Test Impact</td>
<td>Bike O'rama</td>
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<td>Six Stage Sales Process</td>
<td>05/03/2016</td>
</tr>
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<td>Opp68</td>
<td>Opportunity 2</td>
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<td>1 - Qualify Lead</td>
<td>Six Stage Sales Process</td>
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<td>02/7/2016 - A</td>
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<td>05/03/2016</td>
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<tr>
<td>Opp74</td>
<td>Front Desk Un Beach</td>
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<td>1 - Qualify Lead</td>
<td>Six Stage Sales Process</td>
<td>05/03/2016</td>
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<tr>
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<td>Bike O'rama</td>
<td>2 - Needs Analysis</td>
<td>Six Stage Sales Process</td>
<td>05/03/2016</td>
</tr>
</tbody>
</table>

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**=exact**
Contact Us

Contact us to schedule a demo or receive additional information on our tools

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