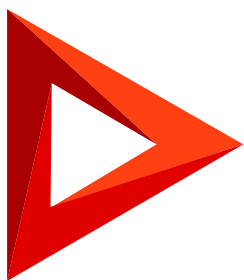


# Long sales

Version 7.17



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# Create an opportunity

PRODUCTS: [SALES ENTERPRISE](#) [SALES TEAM](#)

Manage all Creatio opportunities in the [ *Opportunities* ] section. Handle an opportunity from the moment the customer shows interest in cooperation up to closing the deal.

The section includes several [quick filters](#).

- **By closing date** (the [ *Closed on* ] field) – displays opportunities closed within the specified period. To view the opportunities closed on a specific day, set the day as both the start and the end date.
- **By owner** (the [ *Owner* ] field) – displays opportunities owned by the selected contact.

Create opportunities **manually** or work with opportunities created **automatically** when a lead is transferred to the “Awaiting sale” stage.

## Add an opportunity manually

Fill out several required fields on the mini page to add an opportunity. Then you can run the corporate sales process and enter the information on each opportunity stage gradually by following Creatio's tips.

To register an opportunity:

1. Create a new record in the [ *Opportunities* ] section.
2. Fill out the required fields in the mini page:
  - a. Specify the potential customer for whom the opportunity is created. In the [ *Customer* ] field, you can select a value from the existing contacts and accounts. Start entering the keyword to search for a record.
  - b. In the [ *Name* ] field, enter the keywords to identify the record, e. g., customer name or need type.
  - c. Fill out the [ *Need type* ] field to specify the product category of your company in which a customer is interested.
  - d. In the [ *Budget* ] field, specify the approximate sum that the customer is ready to spend.
  - e. In the [ *Stage* ] field, Creatio specifies “Qualification” as the first stage of the corporate opportunity handling process. You can specify a different stage if needed.
3. Save the page.

As a result, a new opportunity will be added to the system. Now you can [start the corporate sales process](#) on the opportunity. If you have the “Create lead for opportunity” (“CreateLeadForOpportunity” code) [system setting](#) enabled, Creatio will automatically create a connected lead.

## Add an opportunity automatically

If you have the “Run opportunity process” (“StartOppBusinessProcess” code) system setting enabled, Creatio will register the opportunity automatically when you **advance the lead** to the “Awaiting sale” stage.

The corporate sales process will run automatically on the opportunity.

Creatio will populate the following fields:

- The [ *Name* ] field value will be formed as a concatenation of the following values on the opportunity page: [ *Customer* ] / [Number of registered opportunities +1].
- Creatio will copy the list of products from the lead page to the opportunity.
- The following fields will be populated in Creatio Sales: [ *Customer* ], [ *Customer budget* ], [ *Owner* ], [ *Need type* ], [ *Closing date* ] and [ *Direction* ].
- The following fields will be populated in Creatio Financial Service: [ *Customer* ], [ *Department* ], [ *Owner* ] and [ *Created on* ] fields as well as a number of fields on the [ *Parameters* ] detail.

You can open the created opportunity from the lead page: [ *Opportunity info* ] → [ *Opportunity/Order* ]

Set up a dynamic folder to track the new opportunities. For example, filter the opportunities by the creation date.

## Corporate sale process

PRODUCTS: SALES ENTERPRISE

Use the best practices and increase your chances to successfully close the deal by following the **corporate sale process** steps.

Processing an opportunity by the corporate sale process suggests handling an opportunity by stages, starting with qualification. This may lead to creating activities and opening additional pages in Creatio. As these activities are completed, their results influence the process flow.

Process specifics:

- All activities are displayed on the action panel at the top of the opportunity page. The responsible employee receives notifications in the notification center and can see the activities in their calendar.
- You can perform a task directly in the action panel via the mini pages or by opening the task page.
- You can go from one process stage to another in the order that is convenient for you. Each stage can be performed as many times as required to manage an opportunity.
- When you advance an opportunity through stages, all uncompleted tasks of the previous stage will be canceled, while the current stage will create the needed activities regardless of whether the opportunity has already gone through this stage or not.
- Once you advance the opportunity to the final stage, you will not be able to come back to previous stages.

You can view detailed information on the process steps in the process library.

## Run corporate sale process

There are several convenient ways for you to **start** the corporate sales process. For example, If you start working with a new opportunity, we recommend that you run the process from the side panel or from it the command line. In this a case, the opportunity will be created while running the process. If you manually created an opportunity earlier, and now wish to continue working with it, use the corresponding command on the opportunity page.

## Run a process from the side panel


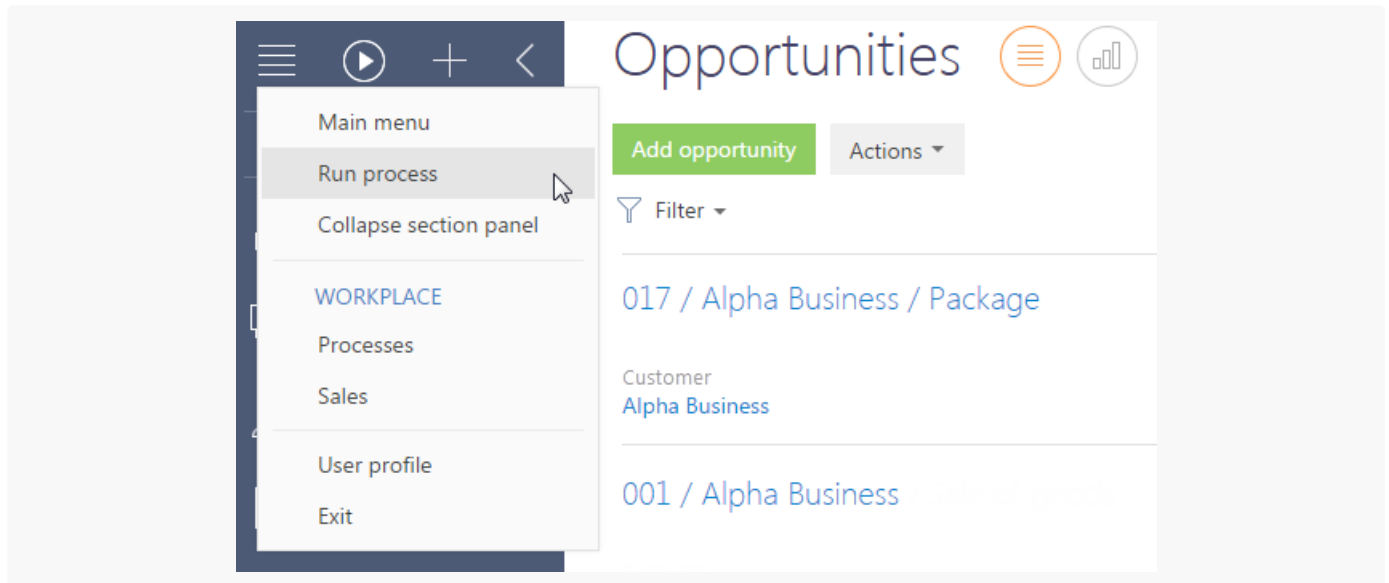
1. In the  button menu, select the [ *Start process* ] action ([Fig. 1](#)).

Fig. 1 Running a process from the side panel



2. In the opened window, select the "Corporate sale" process and click the [ *Start* ] button.

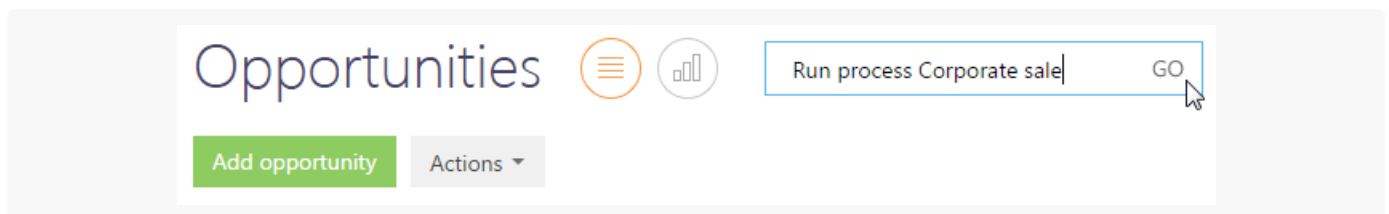
As a result, the corporate sales process will start. The new opportunity page will open with a prompt to fill in its data fields.

## Run a process from the command line

To start a process:

1. Type in the "Run process" command in the command line and then continue by typing in the name of the process - "Corporate sale" ([Fig. 1](#)).
2. Press [ *Enter* ] on the keyboard.

Fig. 1 Running a process from the command line



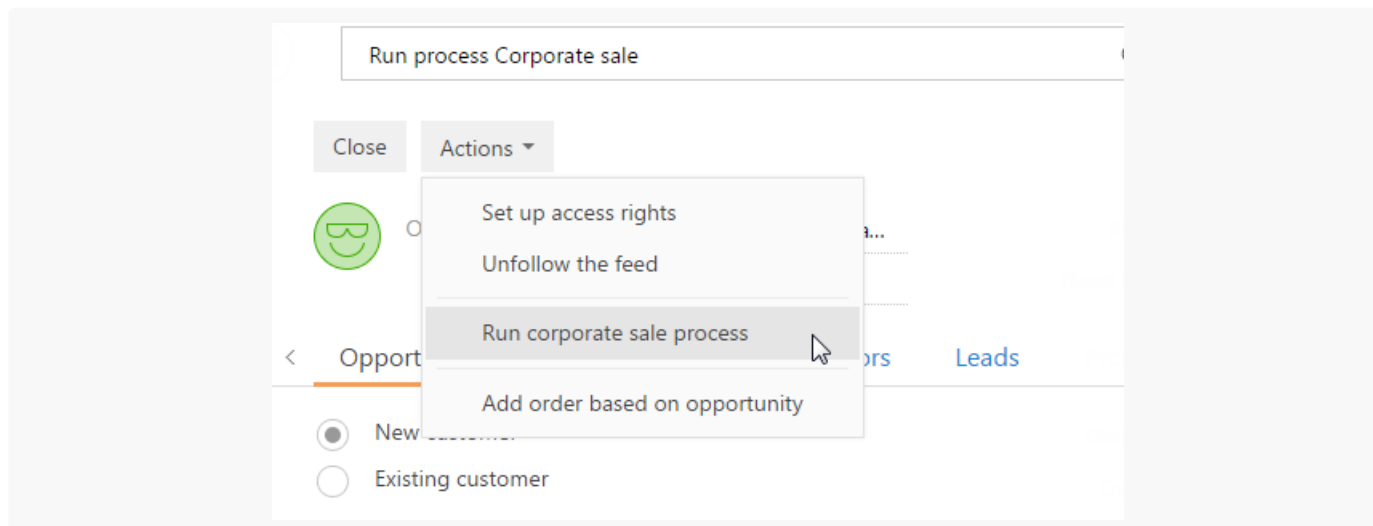
As a result, the corporate sales process will start from the qualification stage. The new opportunity page will open with a prompt to fill in its data fields.

## Run corporate sale process from the opportunity page

1. Open the page of the opportunity you wish to start the corporate sales process by.

2. In the [ *Actions* ] button menu, select the [ *Run corporate sales process* ] command ([Fig. 1](#)).

Fig. 1 Starting a process from the opportunity page



As a result the corporate sales process will be started from the stage on which the opportunity currently is.

## Run a process automatically

The corporate sales process can be started automatically when a lead is transferred to the "Awaiting sale" stage. To make this happen, enable the "Run opportunity process" (StartOppBusinessProcess) [system setting](#).

## Stages of the corporate sale process

### Qualification

Qualification is the first stage in the corporate sale process.

At this stage, you need to analyze and specify the customer need, assign an owner and enter all available information on the opportunity.

- Populate the BANT data: Budget, Authority, Need, Timeframe.
- Specify the decision maker.
- For your sales tactics and correct it as you proceed with the opportunity.

### Stage goal

The goal of this stage is to make sure that the customer has allocated a budget, that the need is well defined, the owners assigned and that there is a scheduled time to make a decision. Adjust the date and the time of presentation.

### What happens in Creatio

The opportunity page opens and the following activities are created:

- Contact the client, assess the needs, coordinate the date and time of the presentation.
- Prepare presentation.

## Next stage

The opportunity advances to the presentation stage.

## Presentation

At this stage you present your company and products to the customer.

- We highly recommend getting ready for the presentation – you can select a presentation from the knowledge base and add some relevant examples to your customer. Think about possible answers to customer questions.
- Learn who will be present at the presentation from the customer side and study information on potential competitors.
- Upon the presentation, contact the customer and clarify the remaining questions if any.
- Populate the meeting data on the opportunity page as you receive more information.

## Stage goal

Make your customer interested in the presentation of your company and the products you offer. Populate information about the results.

## What happens in Creatio

A “presentation” activity is created.

## Next stage

The opportunity advances to the “proposal” stage.

## Proposal

At this stage, you prepare a commercial offer meeting the needs of the customer.

- Adjust the date and time of presenting the offer.
- Prepare the commercial offer in accordance with the data received at the presentation stage and during customer communication. Approve the offer inside the company.
- Make a presentation of commercial offer.
- Contact the client to discuss and mutually agree on the sales conditions.
- When the customer accepts the offer, proceed to contracting.

## Stage goal

Work out a commercial offer that would satisfy the customer need and advance the opportunity to contracting.



## What happens in Creatio

The following activities are created:

- Present the proposal.
- Contact the client to obtain comments and approval of the proposal.
- Prepare and approve the contract within the company.

## Next stage

The opportunity advances to the contracting stage.

## Contracting

At this stage, pass the contract over to the customer and discuss additional details and conditions. After agreements are reached and the documents are ready, sign the contract with the client.

## Stage goal

Approve and sign the contract with the client.

## What happens in Creatio

The following activities are created:

- Send the contract to the client.
- Contact the client to clarify the contract status and the date to receive comments.
- Approve and sign the contract with the client.

After you perform the last task, the process terminates and the opportunity advances to the “Closed won” stage. At this point, you cannot change the opportunity stage any more.

## Result

If the stage was successfully completed, the opportunity will have a “Closed won” status.

## Process termination

The final stage is an important component of any sale, as at this stage you can determine the real amount of income and number of hours spent on the sale. Detailed information on the opportunity enables providing analytics of the won/lost opportunities and planning the sales department activity more effectively.

You can complete the corporate sales process at any stage. To do this, select one of the final stages:

- Select “**Closed won**” if the opportunity was completed successfully. For example, when you signed a contract with the customer. Check if the information on the opportunity page is up to date, create an order and schedule the activities related to the customer. The responsible manager will receive a notification about the successful sale.
- Select “**Closed lost**” if the opportunity was not completed successfully. The responsible manager will receive

a notification about the unsuccessful sale.

**Note.** You can determine the list of final stages in the [ *Opportunity stages* ] lookup.

# Sales pipeline

PRODUCTS: SALES ENTERPRISE

**Sales pipeline** helps you analyze the deals to timely detect the bottlenecks in the sales department operation and react accordingly. You can estimate the conversion rate between stages, pipeline completeness, and compare pipelines of individual managers or sales teams.

## Set up the sales pipeline


By default, the pipeline displays the following stages:

1. Qualification.
2. Presentation.
3. Proposal.
4. Contracting.
5. Closed won.

**Note.** By default, the “Canceled lost” stage is not displayed in the sales pipeline.


You can include certain stages in or exclude them from your pipeline. Set up the way the stages are displayed in the [ *Opportunity stages* ] lookup. The [ *Number* ] field in the [ *Opportunity stages* ] lookup determines the stage order. Learn more: [Set up opportunity stages](#).

To set up the display of opportunity stages in the pipeline:

1. Open the System Designer by clicking .
2. Open the [ *Lookups* ] section.
3. In the “Opportunities” lookup folder, open the [ *Opportunity stages* ] lookup.
4. For the opportunity stage to be displayed in the sales pipeline, select the [ *Y* ] checkbox in the [ *Display in pipeline* ] column. To exclude a stage from the sales pipeline, leave this checkbox unselected.
5. Save the changes.

## Read the sales pipeline

To open the sales pipeline:

1. Open the [ *Dashboards* ] view in the [ *Opportunities* ] section by clicking .

2. Go to the [ *Sales pipeline* ] tab or the [ *Compare pipelines* ] tab.

On the [ *Sales pipeline* ] tab, you can see the analytics about distribution of opportunities by stages.

The diagram element's height corresponds to the number of opportunities with an up-to-date status.

Opportunities with “Closed lost,” “Closed won,” “Closed rejected,” and “Closed rerouted” statuses are not taken into account.

Select the pipeline slice you need to analyze:

- **The number of opportunities** displays how opportunities that started during the specified time period are grouped by stages by the end of that period. For example, the “Qualifications” displays the number of opportunities, which have the “Qualification” stage specified on the [ *Stages* ] detail, and this opportunity falls within the selected time period.
- **Stage conversion rate** displays the percentage of opportunities that moved from one stage to another stage during the specified time period. The diagram displays all opportunities that have records for the selected period on their [ *Stages* ] detail. The value of the conversion rate is calculated as the ratio of the current stage to the previous one. For example, on the “Presentation” stage, the number of sales in the pipeline is 10. The stage conversion is 100% The number of sales on the “Proposal” stage is 4. The stage conversion rate is calculated as the ratio of the “Proposal” stage to the “Presentation” stage multiplied by 100%. In our example, the “Proposal” stage conversion rate is 40%.
- **To the first stage** — the diagram shows the percentage of leads that moved to the “Qualification” stage. The sales percentage on the “Qualification” stage is always at 100%. For example, on the “Qualification” stage, the number of sales is 10. At the “Presentation” stage the number of sales is 5. The stage conversion rate of the “Presentation” stage is calculated as the ratio of the “Presentation” stage to the “Qualification” stage multiplied by 100. In our example, the “Presentation” stage conversion rate is 50%.

## Compare the sales pipelines

The [ *Pipelines comparison* ] tab displays two dashboard components: “Sales pipeline – filter” and “Sales pipeline by company.” The “Sales pipeline – filter” involves filters settings, whereas the “Sales pipeline by company” does not. You can additionally set up a filter by period for each of these pipelines.

# Add order based on opportunity

PRODUCTS: SALES ENTERPRISE

You can create one or several orders based on an opportunity at any of the opportunity stages.

To add an order:

1. Open the opportunity by which you need to add an order.
2. Click [ **Add order** ] at the top of the opportunity page.
3. If you have any products added to the opportunity, Creatio will prompt to copy the products to the order. Select one of the following:
  - a. **All** – copies all products from the opportunity page to the created order.
  - b. **Select** – copies only selected products from the opportunity page to the created order. When clicking this button, the lookup window with the list of products will be displayed. Select the products you need and click

[ *Select* ].

c. **Cancel** – cancel creating of the order.

4. The order page will open to populate additional information. For example, here you can generate the installment plan or specify delivery information.

As a result, Creatio will register the order connected to the selected opportunity. You can open the created order from the opportunity page by using the [ *Opportunity history* ] tab.



## Set up opportunity stages

PRODUCTS: SALES ENTERPRISE

You can set up the opportunity stages in the [ *Opportunity stages* ] lookup. Here you can set up the following features:

- The general list of all possible opportunity stages.
- Specify whether the stage will display on the stage progress bar on the opportunity page.
- Specify whether the stage will display in the sales pipeline.
- Specify the stage sequence in the sales pipeline.
- The maximum probability value that you can specify for an opportunity at a stage.

The setup procedure is as follows:

1. Click  to open the System Designer.
2. Open the [ *Lookups* ] section.
3. In the “Opportunities” lookup folder, open the [ *Opportunity stages* ] lookup.
4. Edit the stage settings according to your business task. You can edit the stage settings using the editable list or the stage page by clicking . The stage settings are described below.

Name	Description
Number	The number is used to define the sequence of stages in the sales pipeline. The column is not displayed by default. You can add it manually. Learn more: <a href="#">Set up columns</a> .
Description	In the description of the stage, you can specify when the sale must be transferred to the next stage. The column is not displayed by default. You can add it manually. Learn more: <a href="#">Set up columns</a> .
Maximum probability	The maximum available value, in percent, that can be specified in the [ <i>Probability</i> ] field of the opportunity edit page to indicate the possibility of successful opportunity closure on the given stage. The column is not displayed by default, however you can add it manually. Learn more: <a href="#">Set up columns</a> .
Period for planning the next step, days	The maximum interval between activities scheduled for an opportunity on the given stage. The column is not displayed by default. You can add it manually. Learn more: <a href="#">Set up columns</a> .
Final	Select this checkbox if the given stage is the last stage of the opportunity.
Successful	Select this checkbox for the final stages of the won opportunities. The field is non-editable if the [ <i>Final</i> ] checkbox is not selected.
Show in funnel	Select the checkbox to enable corresponding stage in the “Sales Pipeline” dashboard.
Show in progress bar	Select the checkbox to enable corresponding stage on the workflow bar of the opportunity page. The column is not displayed by default. You can add it manually. Learn more: <a href="#">Set up columns</a> .

## Opportunities FAQ

PRODUCTS: [SALES ENTERPRISE](#)

### Can you work with opportunities not by a process?

If your company's approach to sales management is different from the one in Creatio, you can work with the [ *Opportunities* ] section without using the pre-defined sales process.

In this case, do not start the corporate sales process and just change the stage on the opportunity page manually. Fill in the required fields, enter information in the tabs and details.

For the process to not run automatically when transferring a lead to the [ *Awaiting sale* ] stage, disable the “Start sales process” system setting.

## How to change the standard sales process?

You can delete, change or add process stages, and change the list of activities in accordance with your needs.

To change the process:

1. Open the [ *Process library* ] section.
2. Find the default process that you want to change. The corporate sales process consists of several subprocesses with each referring to a particular opportunity stage. When searching for a subprocess, pay attention to the name and the 7.8 prefix. For example, if you need to change the "Qualification" stage, find a process called "Opportunity qualification v7.8.0".
3. Create a copy of the basic corporate sales process by clicking the [ *Copy* ] button record in the process record.
4. Make the required changes in the copy. You can change the elements, remove elements or add new ones.
5. Save the edited copy and publish.
6. Go to the original version of the corporate sales process and disable it by clicking the [ *Actions* ] → [ *Disable* ].

**Note.** Detailed descriptions of business process management are available in the Creatio business process documentation.

After performing the settings, the system will use the custom corporate sales process.

## How to change basic tasks that are created to custom tasks?

To change the list of basic activities, which are formed during the corporate sales process, you need to replace the basic sales process with a custom copy. More information about changing a default process: [How to change the standard sales process?](#)

After you have made the necessary adjustments at each stage of the updated sales process, the system will form the activities that you have added/changed.

## Under what conditions is the [DM] field filled in on the opportunity page?

The [ *DM* ] field in the "BANT" profile of the opportunity page contains the name of the contact who is the decision maker for the opportunity. The field is filled in automatically. To specify the decision maker on the opportunity page, add the contact and in the [ *Role* ] field enter "DM" on the [ *Contacts* ] details of the [ *Opportunity data* ] tab.

Note that the [ *DM* ] field pulls the data from the opportunity page, not from the page of the contact that also contains the [ *Role* ] field. This field denotes the decision maker for the whole company. At the same time a different person may make decisions about the sale.

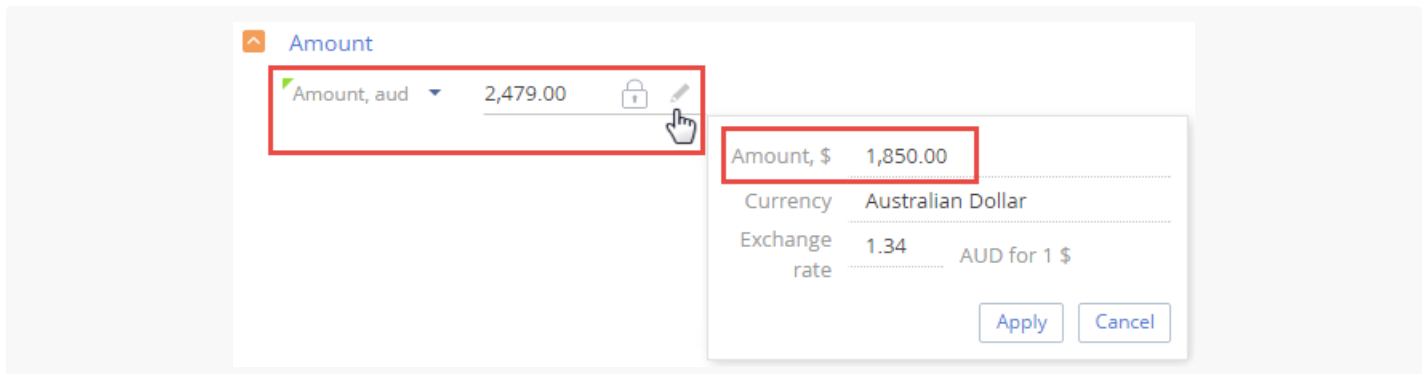
## How to set up different processes for different opportunity types?

This functionality can be implemented by the developer means.

## Why is the amount calculated incorrectly after changing currency?

When you change the currency of the [ *Amount* ] multi-currency field, the value in the field and in the multi-currency edit pop-up are different ([Fig. 1](#)).

Fig. 1 Different values in a multi-currency field and the corresponding multi-currency edit pop-up



After changing currency in a filled-in multi-currency field, the specified amount will be automatically converted to the new value according to currency exchange rates. At the same time, the [ *Amount* ] field on the multi-currency edit pop-up displays the amount in base currency. This is a non-editable field. Learn more in the "[Working with currencies](#)" article.

## What happens if one of the activities is skipped

If one or more of the stage activities were not completed, and the opportunity was advanced to the next stage with the workflow bar, then the activity will be canceled automatically. Creatio will generate a new list of activities corresponding to the current opportunity stage.

The uncompleted tasks that were created manually will not be canceled when advancing to the next stage. Uncompleted tasks do not affect transition to next stages.