Creatio Academy

Long sales

Create an opportunity

Version 7.17

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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.