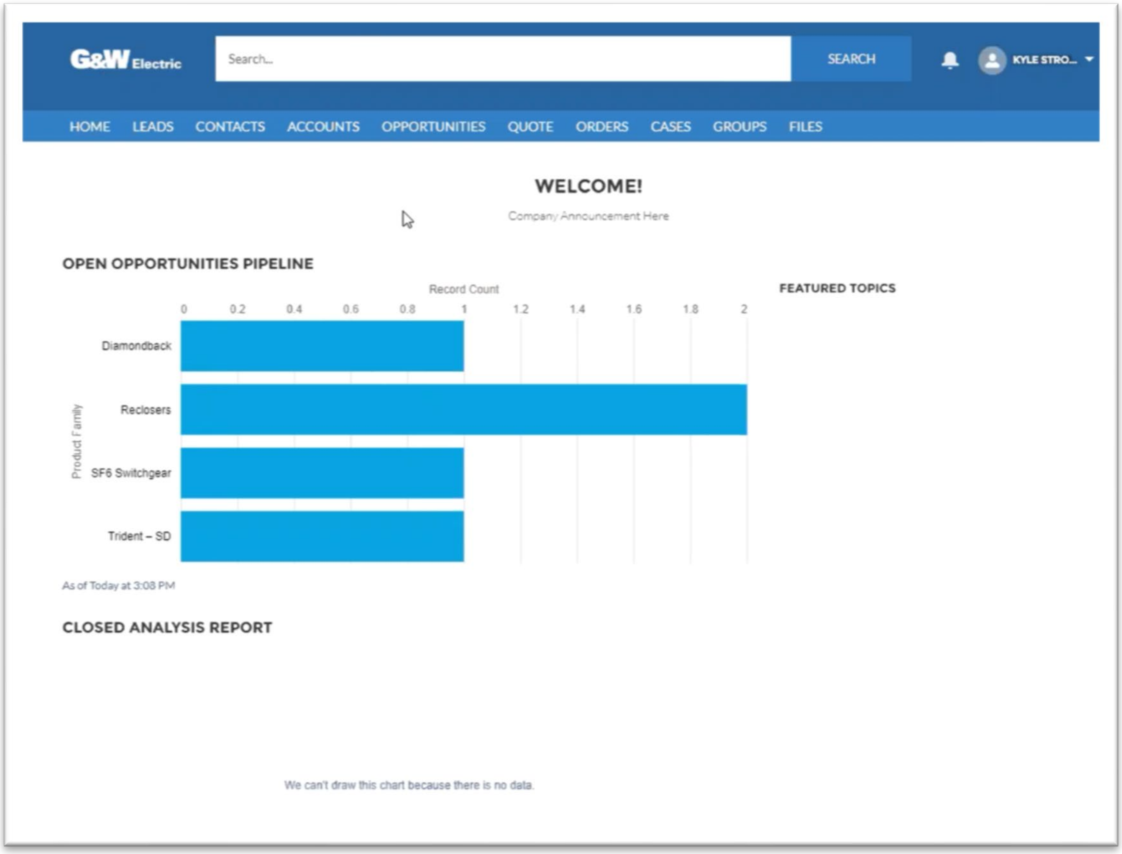
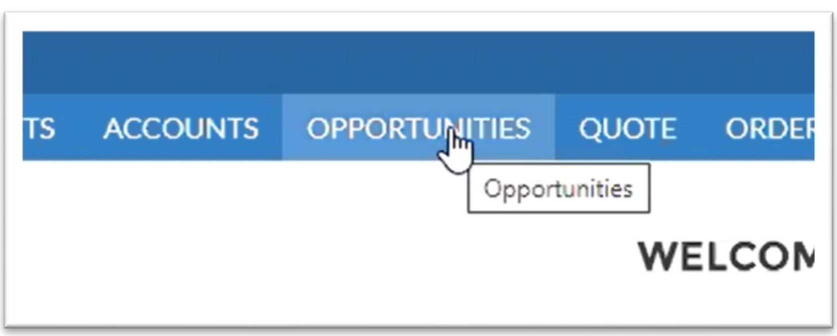
Creating an Opportunity – Community Portal

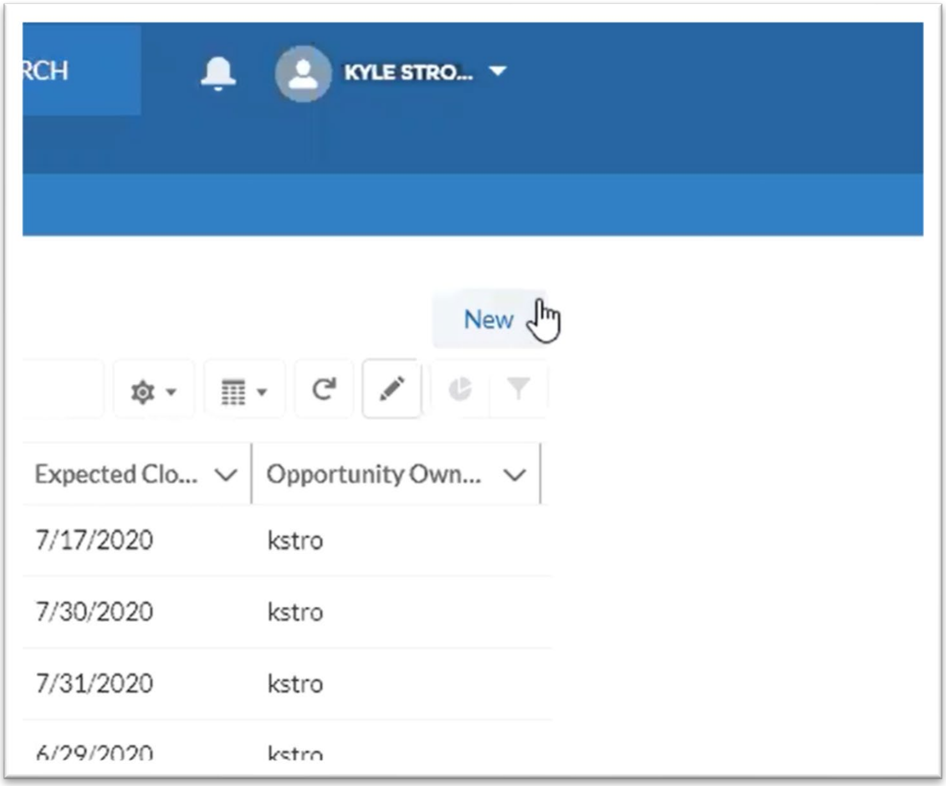
Step 1: Navigate to home screen in the partner community.



Step 2: Click on the "Opportunities" tab.



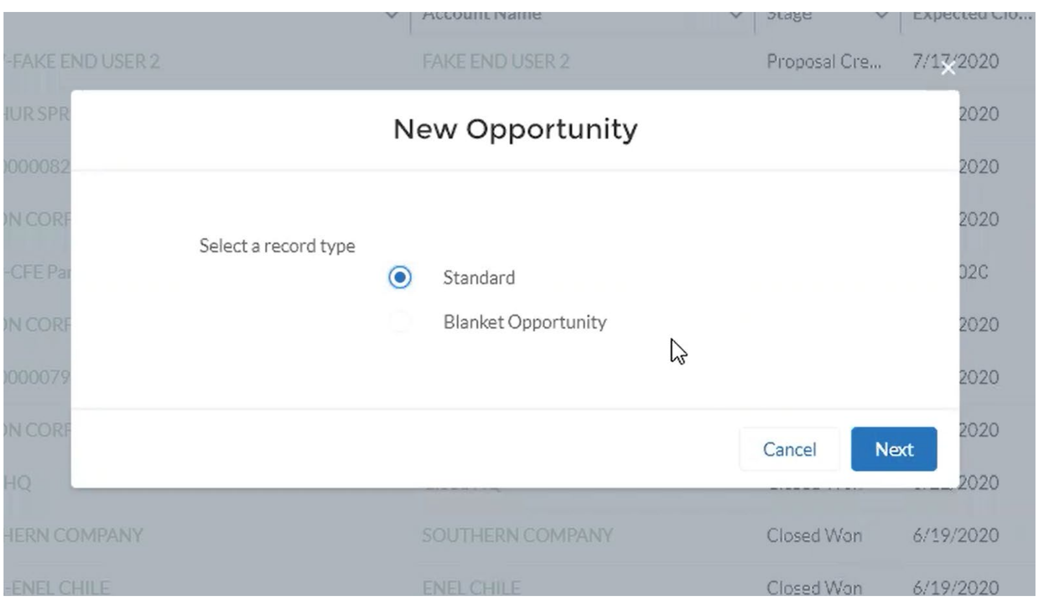
Step 3: Click "New".



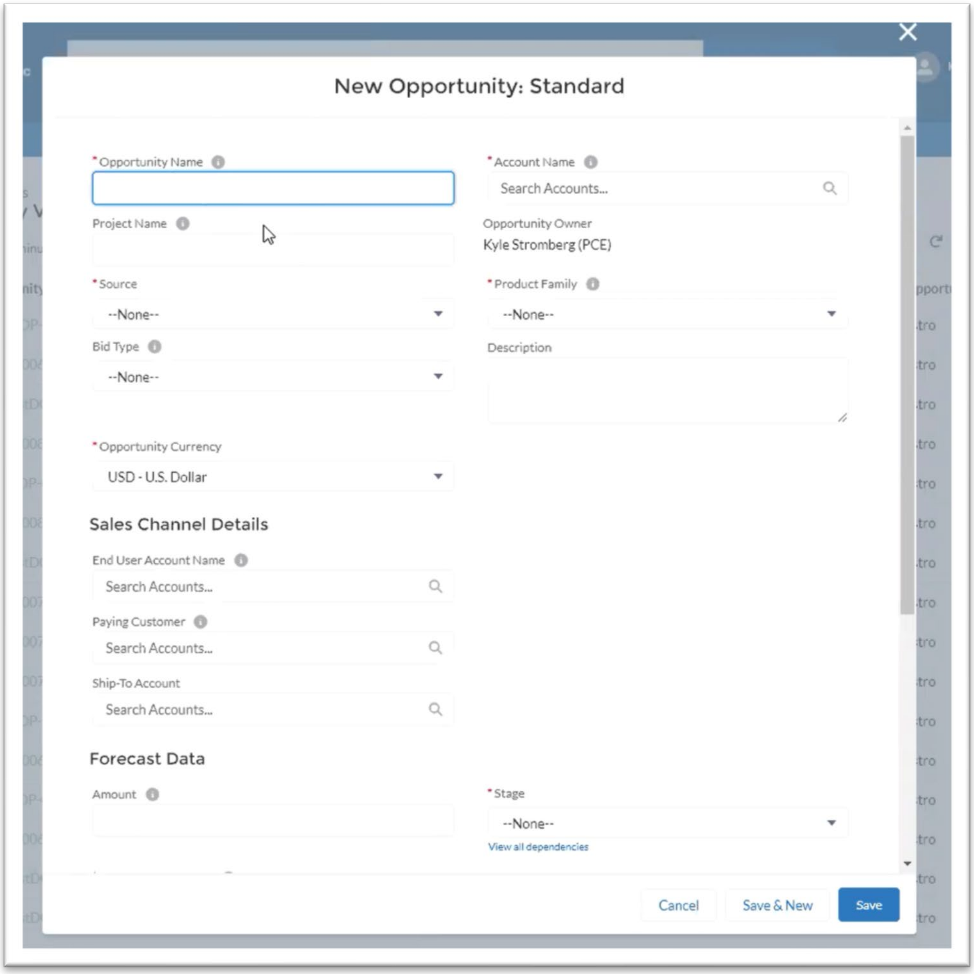
Step 4: Select your record type. There are two options:

<u>Standard:</u> This is one project that we win or lose then the project is complete

<u>Blanket Opportunity:</u> We are sending out a quote that we would expect to receive multiple orders for, like winning a contract.

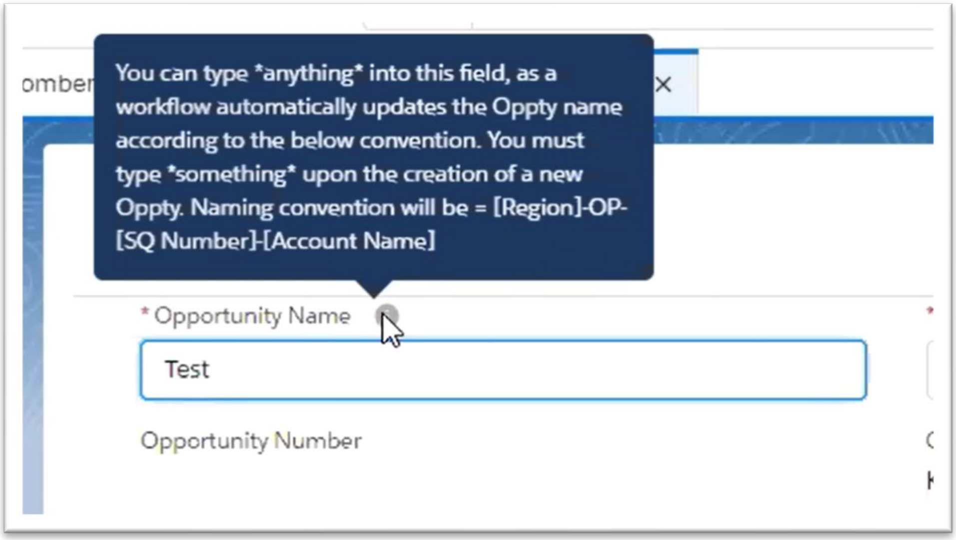


Step 4: Once you have decided your opportunity type, you will need to fill out as much information on that opportunity that you have available to you.

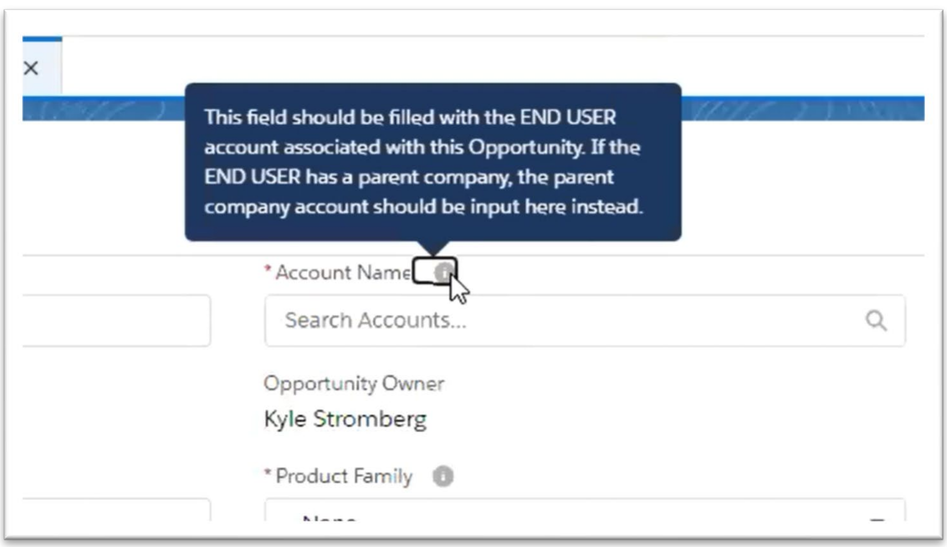


Note*

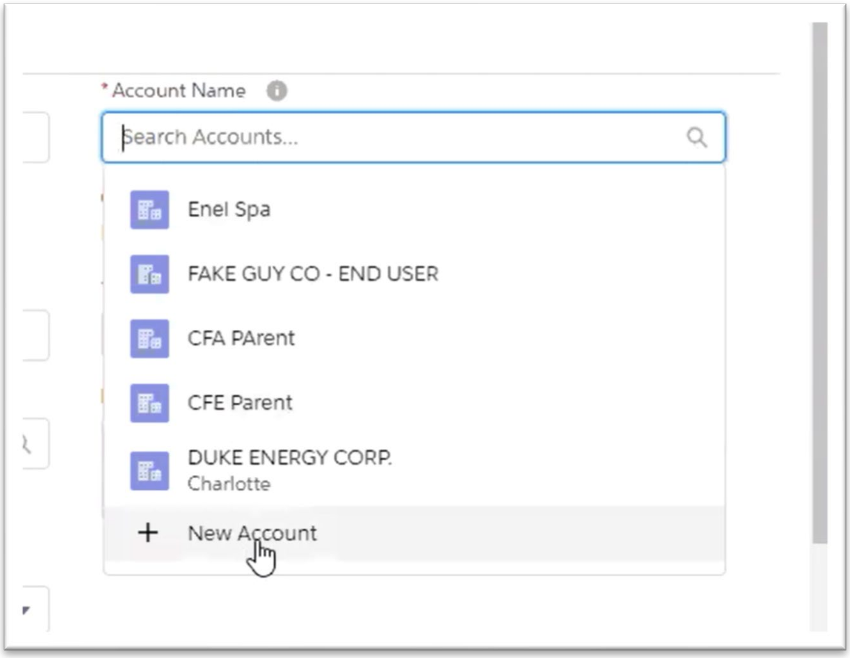
Opportunity name has a standard naming convention that will override what you type into the box to keep things organized.



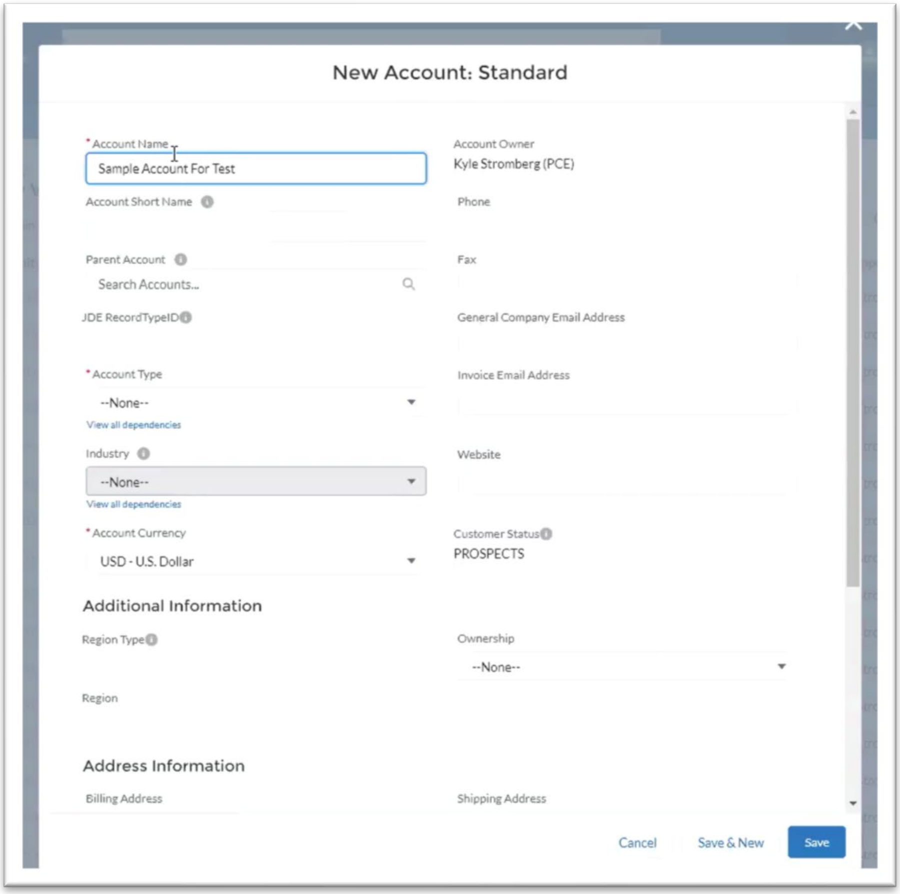
Account name should be populated with END USER information. If the END USER has a parent company, then the parent company should be used.



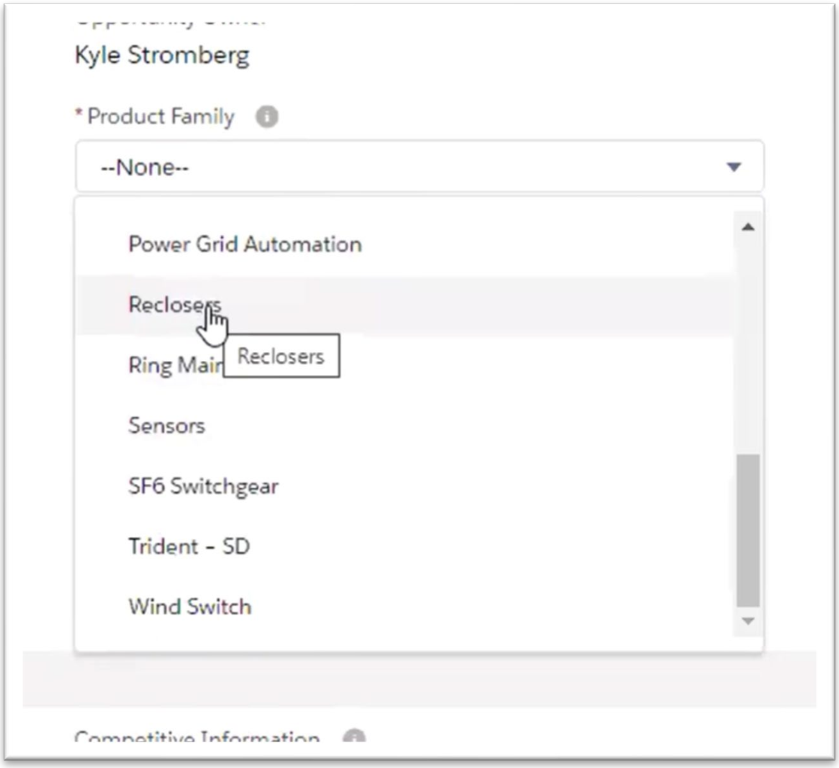
If you need to create a new account, you may do so by clicking “New Account”.



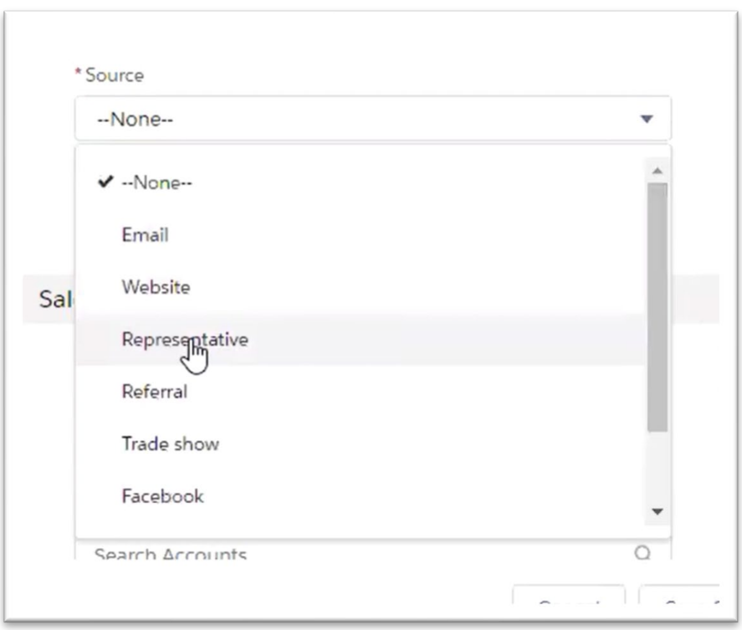
When creating a new account, please fill the form out as thoroughly as possible.



Once you have your account selected/created, pick the product family that is most representative of the opportunity you are creating.



"Source" tells us where the opportunity came from.



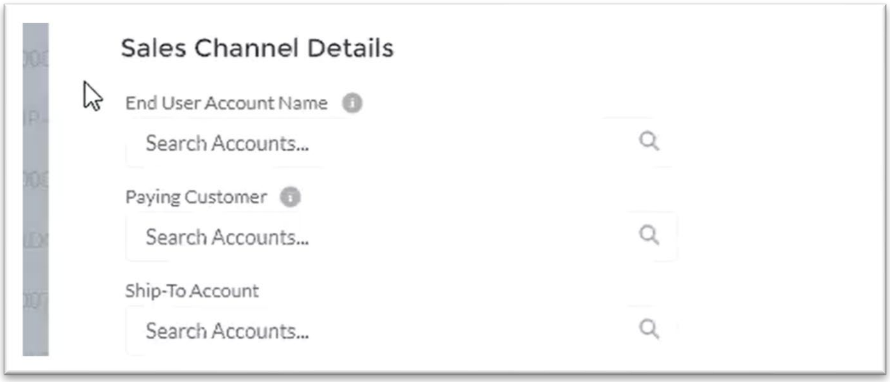
Step 5:

Select your channel partner details.

<u>End User:</u> The actual account who will be utilizing the product.

Paying Customer: Who is requesting the quote for this opportunity?

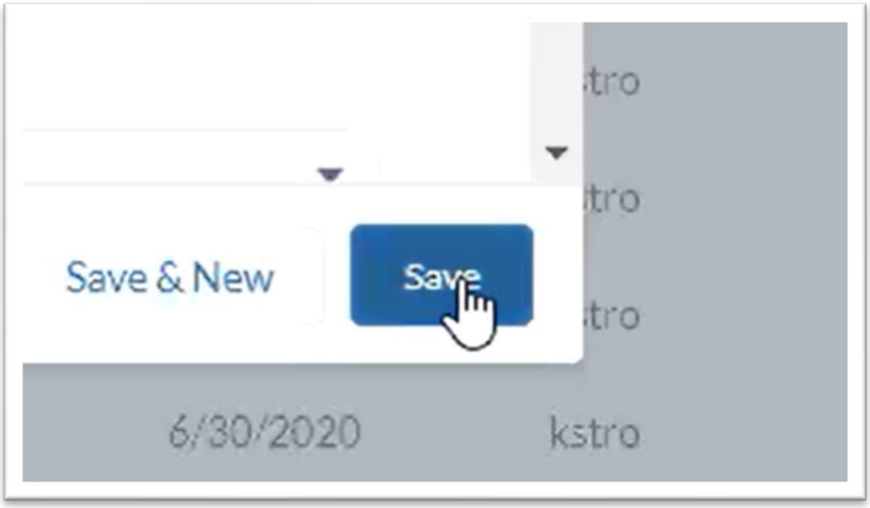
Ship to Account: Where the product will be shipped to.



Step 6:

Forecast data, when starting a new opportunity, you should set the "Stage" to "New". Fill in any estimated profits and fill in your expected close date.

Once you have filled out all the required fields and updated the form with all the information that you have. Click "Save".



Your opportunity has been created.