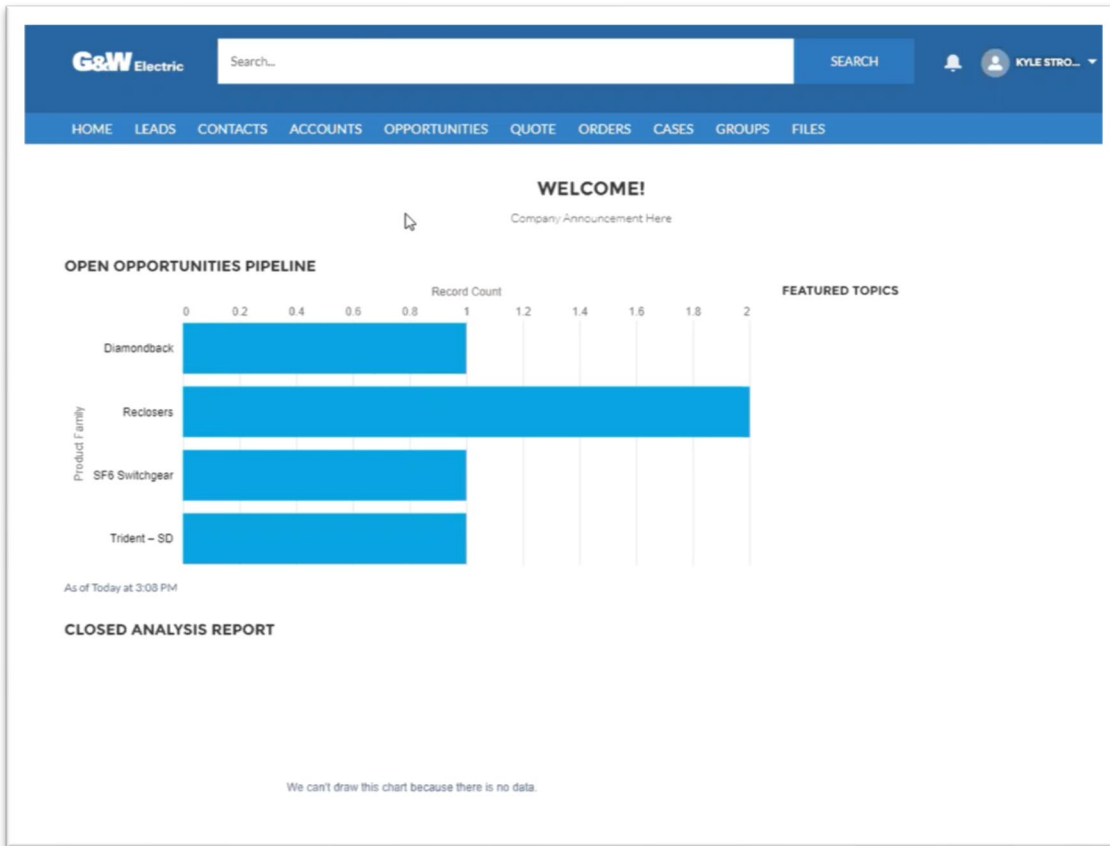
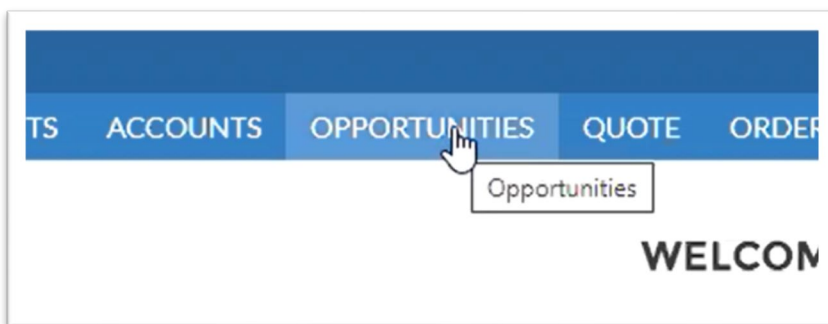


Creating an Opportunity – Community Portal

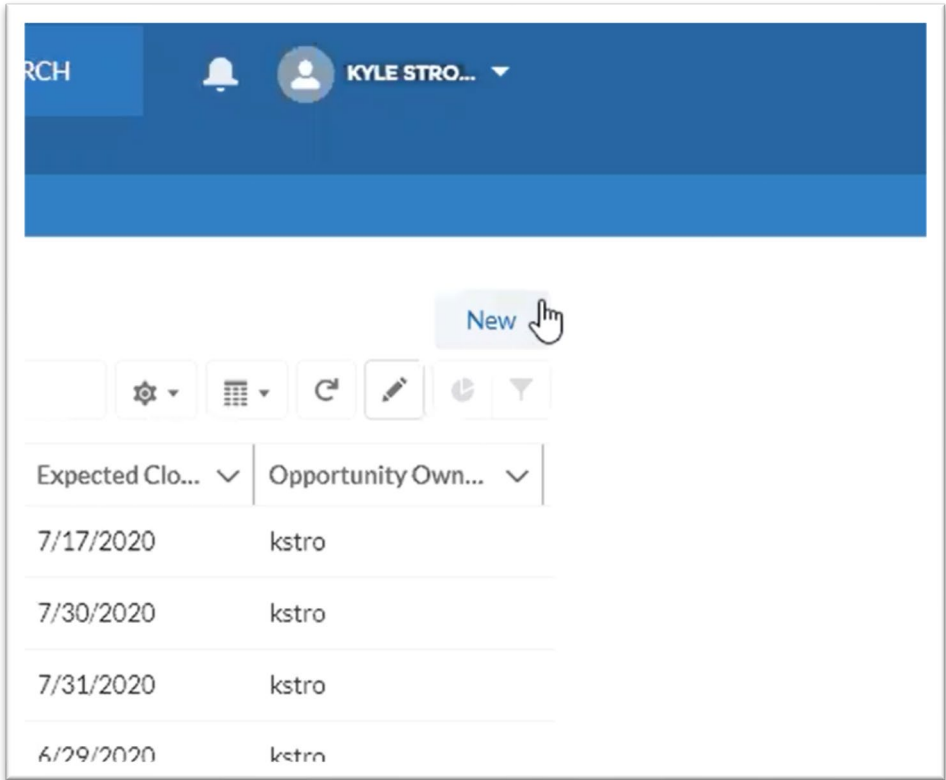
Step 1: Navigate to home screen in the partner community.



Step 2: Click on the “Opportunities” tab.



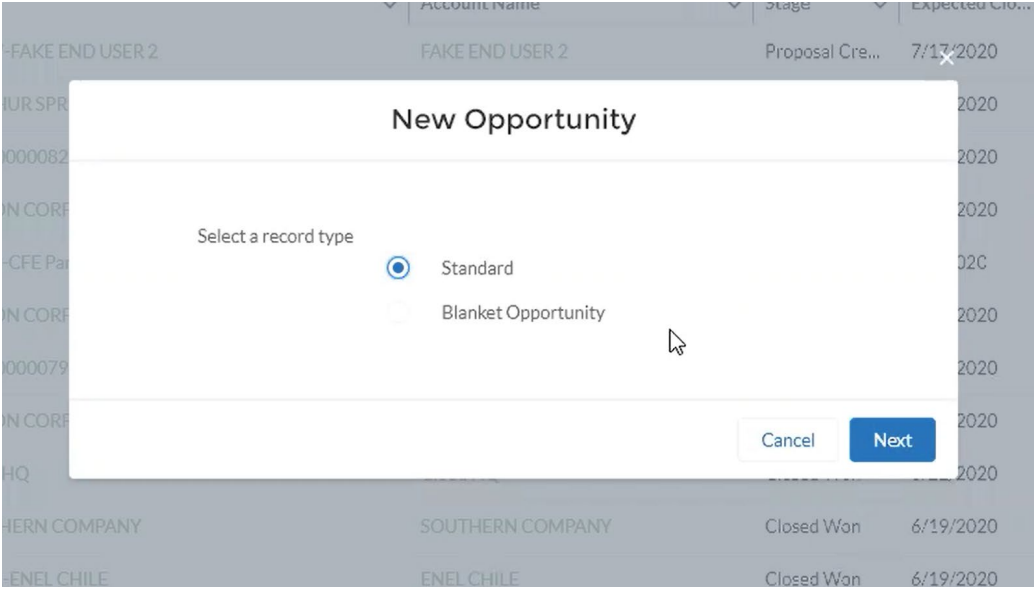
Step 3: Click “New”.



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

Standard: This is one project that we win or lose then the project is complete

Blanket Opportunity: 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.

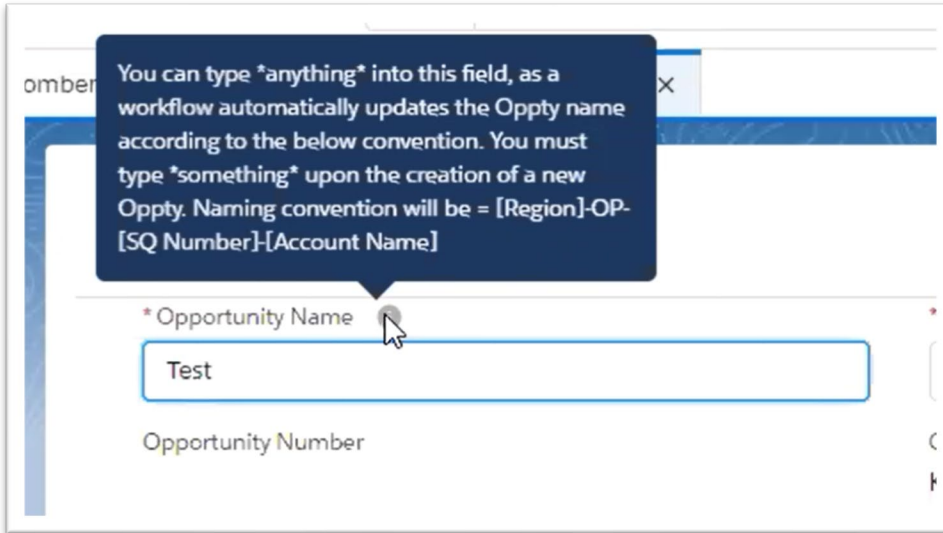
The screenshot shows a 'New Opportunity: Standard' form. The form is organized into several sections:

- Opportunity Name:** A text input field.
- Project Name:** A text input field.
- Source:** A dropdown menu with the value '--None--'.
- Bid Type:** A dropdown menu with the value '--None--'.
- Opportunity Currency:** A dropdown menu with the value 'USD - U.S. Dollar'.
- Sales Channel Details:** Three search fields for 'End User Account Name', 'Paying Customer', and 'Ship-To Account', each with a 'Search Accounts...' label and a magnifying glass icon.
- Forecast Data:** An 'Amount' input field.
- Account Name:** A search field with a 'Search Accounts...' label and a magnifying glass icon.
- Opportunity Owner:** A text field containing 'Kyle Stromberg (PCE)'.
- Product Family:** A dropdown menu with the value '--None--'.
- Description:** A text area.

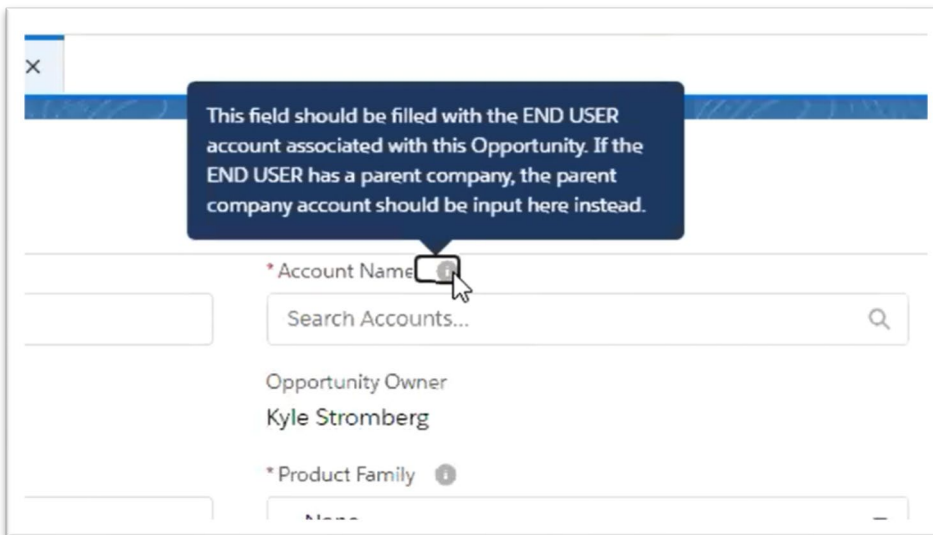
At the bottom right of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'. Below the 'Stage' dropdown menu, there is a link that says 'View all dependencies'.

Note*

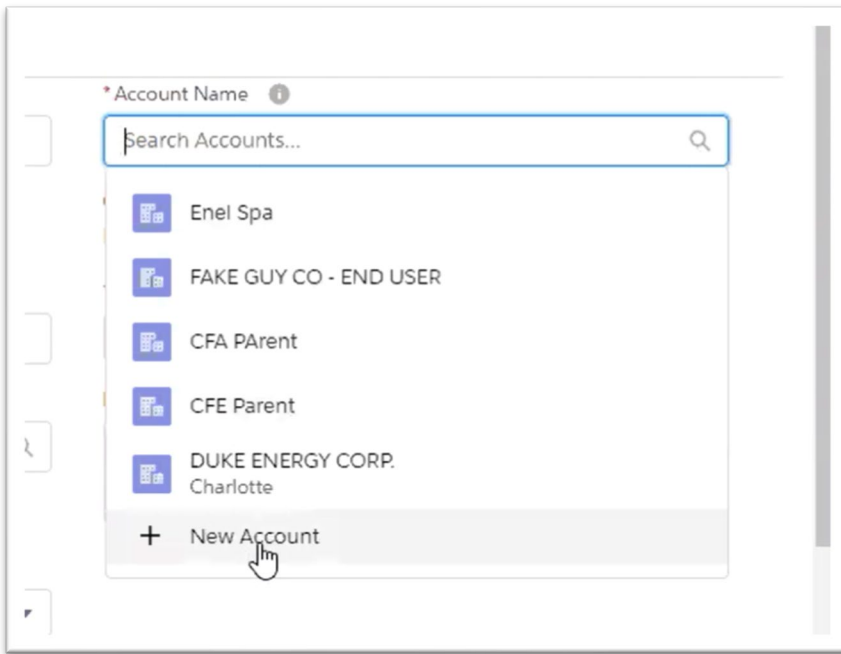
Opportunity name has a standard naming convention that will override what you type into the box to keep things organized.



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”.



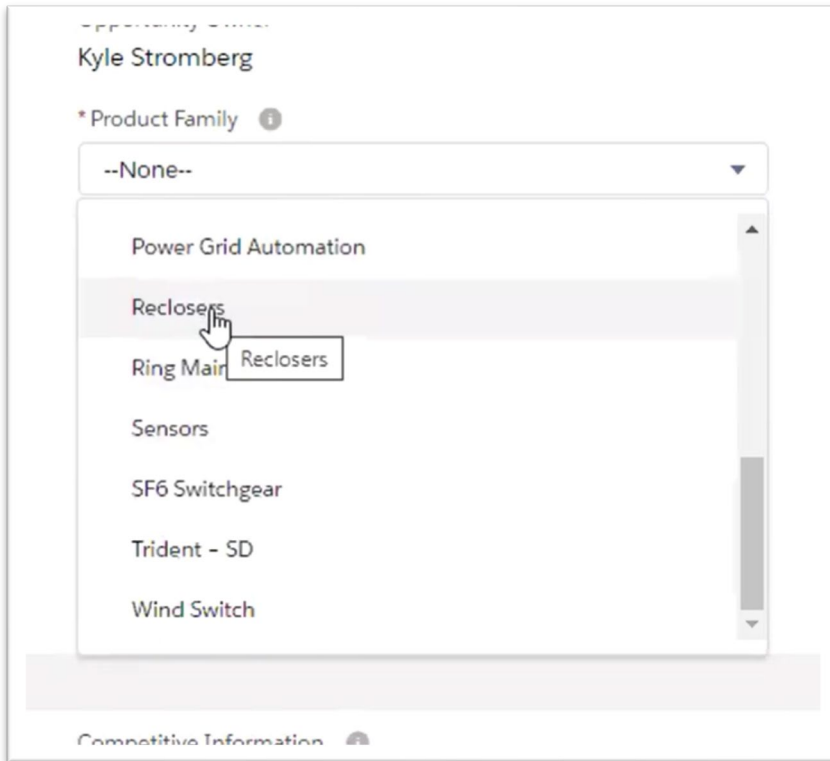
When creating a new account, please fill the form out as thoroughly as possible.

New Account: Standard

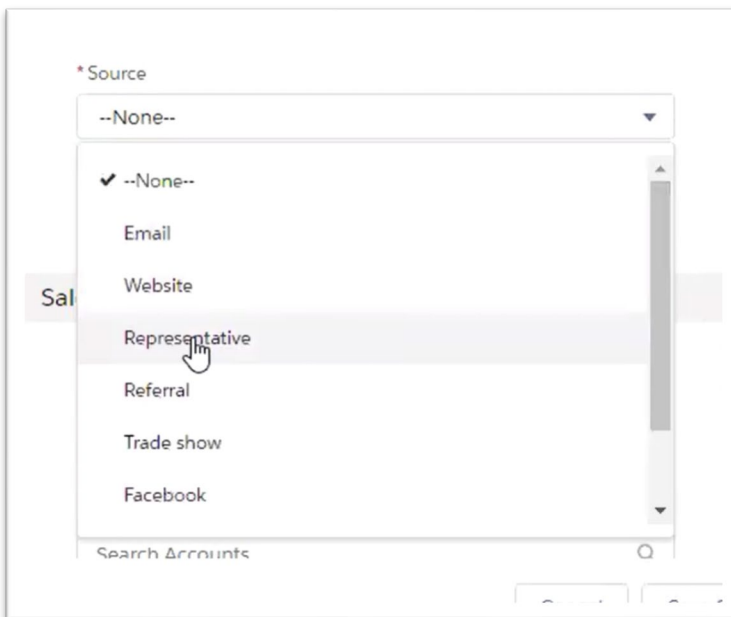
<p>*Account Name <input type="text" value="Sample Account For Test"/></p> <p>Account Short Name <input type="text"/></p> <p>Parent Account <input type="text" value="Search Accounts..."/></p> <p>JDE RecordTypeID <input type="text"/></p> <p>*Account Type <input type="text" value="--None--"/></p> <p>Industry <input type="text" value="--None--"/></p> <p>*Account Currency <input type="text" value="USD - U.S. Dollar"/></p> <p>Additional Information</p> <p>Region Type <input type="text"/></p> <p>Region <input type="text"/></p> <p>Address Information</p> <p>Billing Address <input type="text"/></p>	<p>Account Owner Kyle Stromberg (PCE)</p> <p>Phone <input type="text"/></p> <p>Fax <input type="text"/></p> <p>General Company Email Address <input type="text"/></p> <p>Invoice Email Address <input type="text"/></p> <p>Website <input type="text"/></p> <p>Customer Status <input type="text" value="PROSPECTS"/></p> <p>Ownership <input type="text" value="--None--"/></p> <p>Shipping Address <input type="text"/></p>
--	---

[Cancel](#) [Save & New](#) [Save](#)

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.



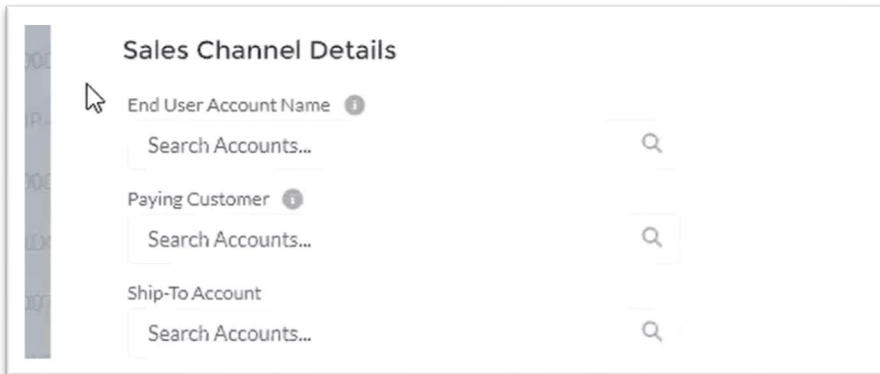
Step 5:

Select your channel partner details.

End User: 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.

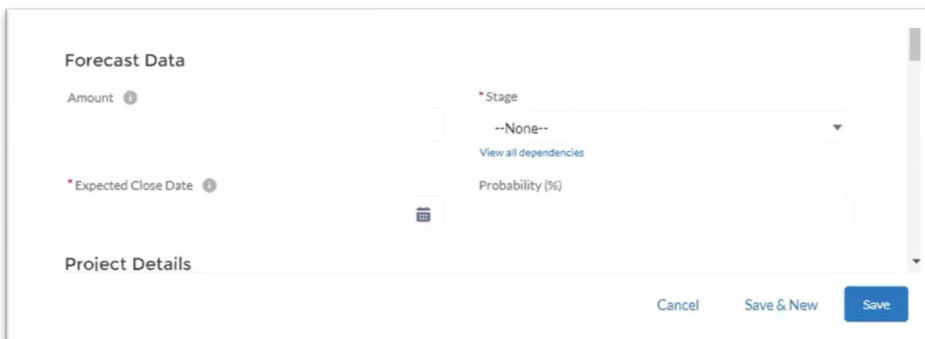


The image shows a form titled "Sales Channel Details". It contains three sections, each with a label and a search input field:

- End User Account Name**: Includes a search input field with the placeholder text "Search Accounts..." and a magnifying glass icon.
- Paying Customer**: Includes a search input field with the placeholder text "Search Accounts..." and a magnifying glass icon.
- Ship-To Account**: Includes a search input field with the placeholder text "Search Accounts..." and a magnifying glass icon.

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.

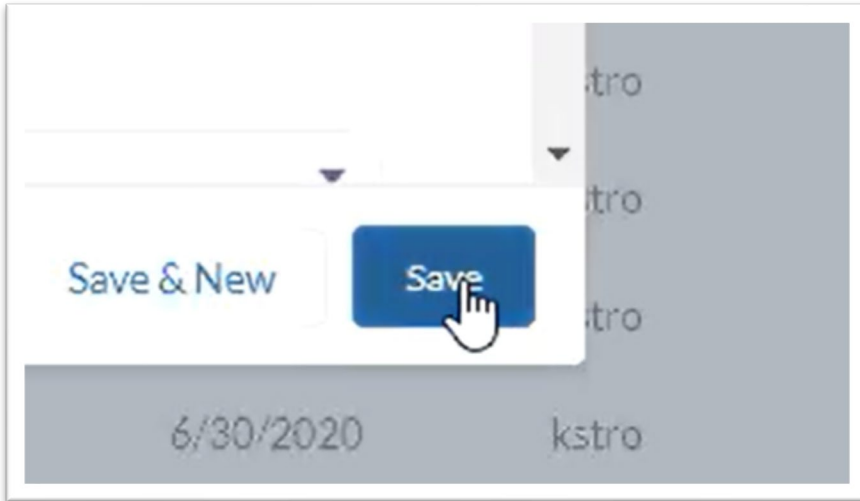


The image shows a form titled "Forecast Data". It contains several fields:

- Amount**: A text input field.
- Expected Close Date**: A date picker field with a calendar icon.
- Stage**: A dropdown menu currently showing "--None--". Below it is a link that says "View all dependencies".
- Probability (%)**: A text input field.

At the bottom of the form, there are three buttons: "Cancel", "Save & New", and "Save".

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.

The screenshot shows the G&W Electric CRM interface. At the top, a green notification banner states "Opportunity 'project XYZ' was created." The navigation bar includes: HOME, LEADS, CONTACTS, ACCOUNTS, OPPORTUNITIES, QUOTE, ORDERS, CASES, GROUPS, FILES. Below the navigation bar is a stage selector with options: New, Needs Analysis, Proposal Cre..., Proposal Rev..., Proposal Pres..., Negotiation, Closed, and a "Mark Stage as Complete" button. The main content area displays the details for an opportunity: "MidwestDOM-OP-000098-Sample Account For Test".

Account Name	Amount	Expected Close Date	Opportunity Owner	Stage	Source
Sample Account For Test	USD 120,000.00	8/28/2020	Kyle Stromberg (PCE)	New	Representative

The interface also features a "DETAILS" section with the following information:

- Opportunity Name:** MidwestDOM-OP-000098-Sample Account For Test
- Project Name:** Project XYZ
- Source Representative:** Sample Account For Test
- Bid Type:** Budget
- Opportunity Currency:** USD - U.S. Dollar
- Account Name:** Sample Account For Test
- Region:** MidwestDOM
- Opportunity Owner:** Kyle Stromberg (PCE)
- Product Family:** SF6 Switchgear
- Description:** This opp is for Qty 3 SF6 Switches.
- Sales Channel Details:** End User Account Name: Sample Account For Test, End User Country: United States, Partner Customer.

On the right side, there is a feed section with a search bar "Search this feed..." and a notification: "Kyle Stromberg (PCE) (Partner) updated this record. Just now". Below the notification are "Like" and "Comment" buttons, and a text input field "Write a comment...".