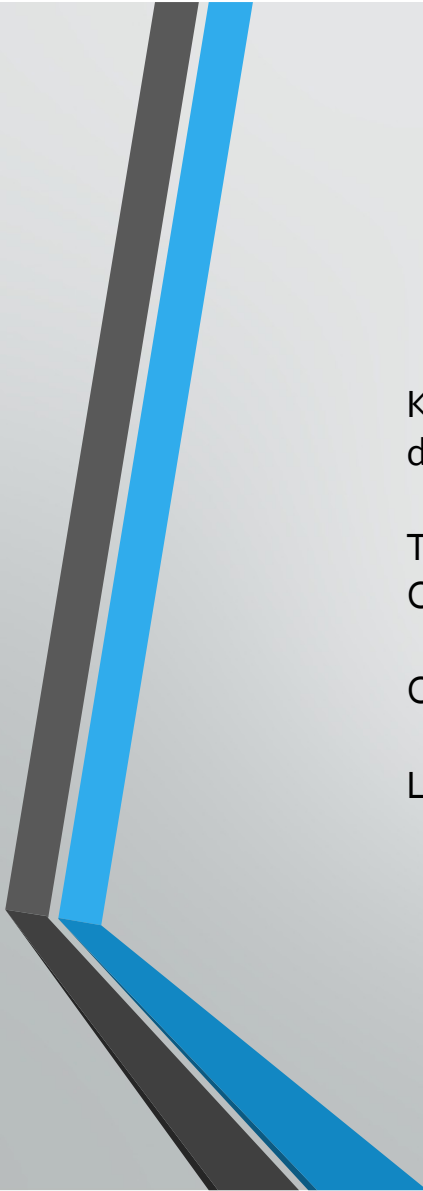




Total Contacts with HelpDesk Solution

Version 7

OPPORTUNITIES
Instructions



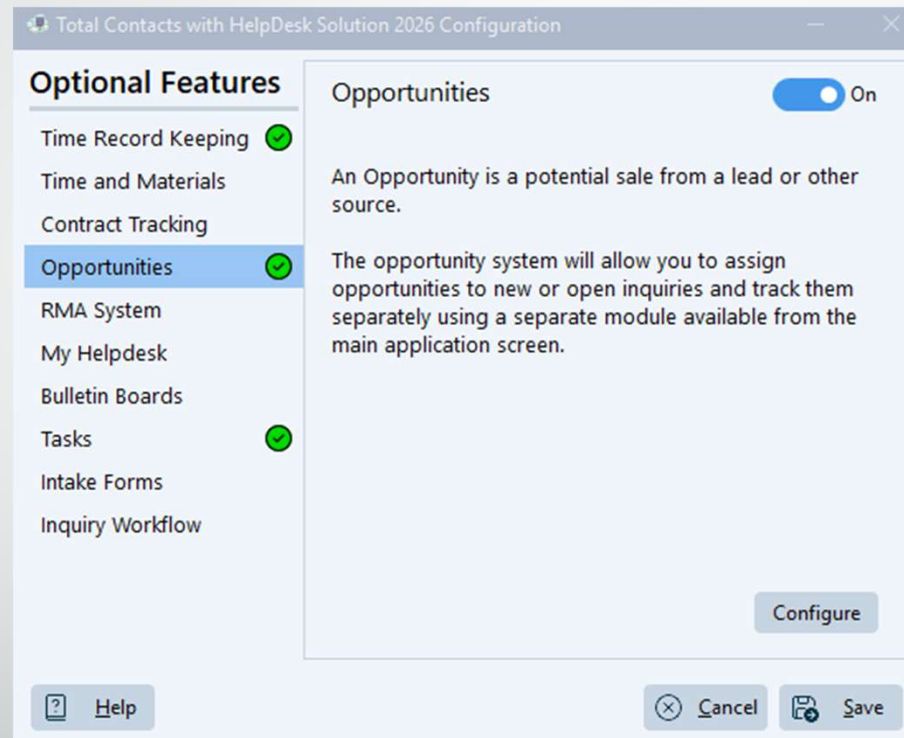
Keeping track of quotes and sales can be a daunting task. With Total Contacts, we have designed this feature to be user friendly.

This guide is designed to walk you through configuration and how to use the feature, OPPORTUNITIES.

Opportunities are linked to Inquiries for tracking.

Let's get started.....

First is to enable the feature. Launch configuration > Optional Features > select Opportunities and enable and click configure button






Select Price Fields

Total Contacts with HelpDesk Solution 2026 Configuration

Opportunity Configuration

Select a configuration category below:

-  **Price Fields**
Specify opportunity price fields and optional calculation
-  **Field Prompts**
Specify optional fields and prompts




[Help](#) [Back](#) <<

The default fields are quantity and price, which calculate gross. If you want/need to view 'net' amount, you can add additional fields. We included a field labeled adjustment, which will subtract from the gross amount. Any additional fields will also subtract from gross.

Total Contacts with HelpDesk Solution 2026 Configuration

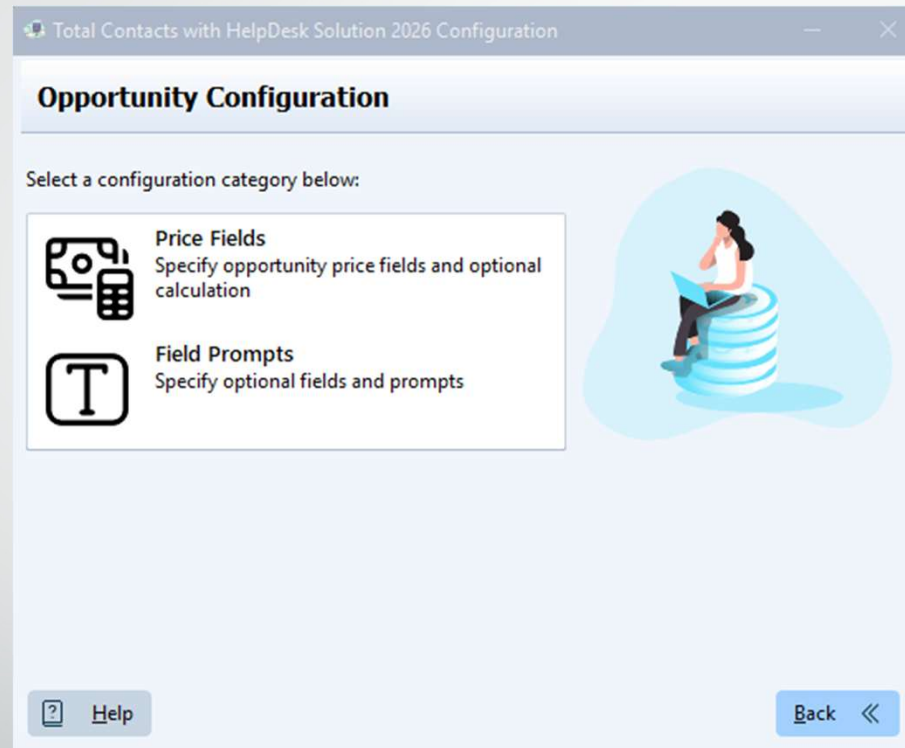
Opportunity Price Field Options

- Include quantity and item price fields, calculate gross amount as quantity x item price.
- Calculate net amount as gross amount minus the sum of the following:
 - Adjustment
 - COG (USER MONEY 1)
 - Reseller (USER MONEY 2)
 - USER MONEY 3



Help Back Save

If you wish to customize some fields, we have provided additional fields. Click on Field Prompts

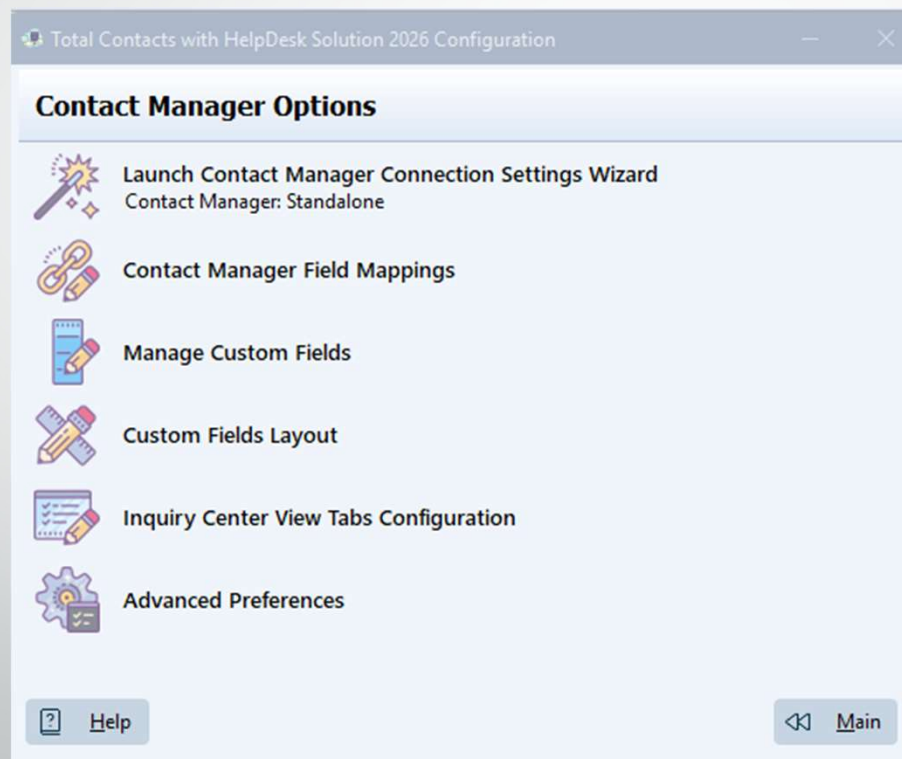


We have provided three custom date fields, three money fields which will subtract off gross amount, and three user text fields for notes.

Enabled	Field	Caption
<input checked="" type="checkbox"/>	USER DATE 1	Purchased
<input type="checkbox"/>	USER DATE 2	
<input type="checkbox"/>	USER DATE 3	
<input checked="" type="checkbox"/>	USER MONEY 1	COG
<input type="checkbox"/>	USER MONEY 2	
<input type="checkbox"/>	USER MONEY 3	
<input type="checkbox"/>	USER TEXT 1	
<input type="checkbox"/>	USER TEXT 2	
<input type="checkbox"/>	USER TEXT 3	

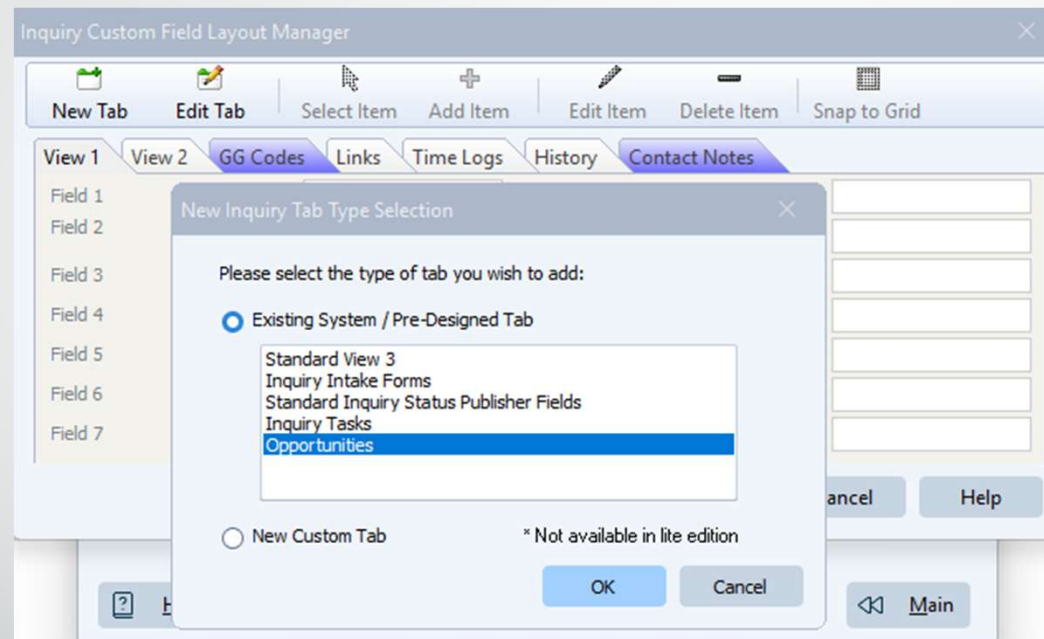
Now that you have enabled and configured OPPORTUNITIES, now we need to configure the feature to be accessible from the client view.

Go into Total Contacts main configuration > Contact Manager > Inquiry Center View Tabs Configuration

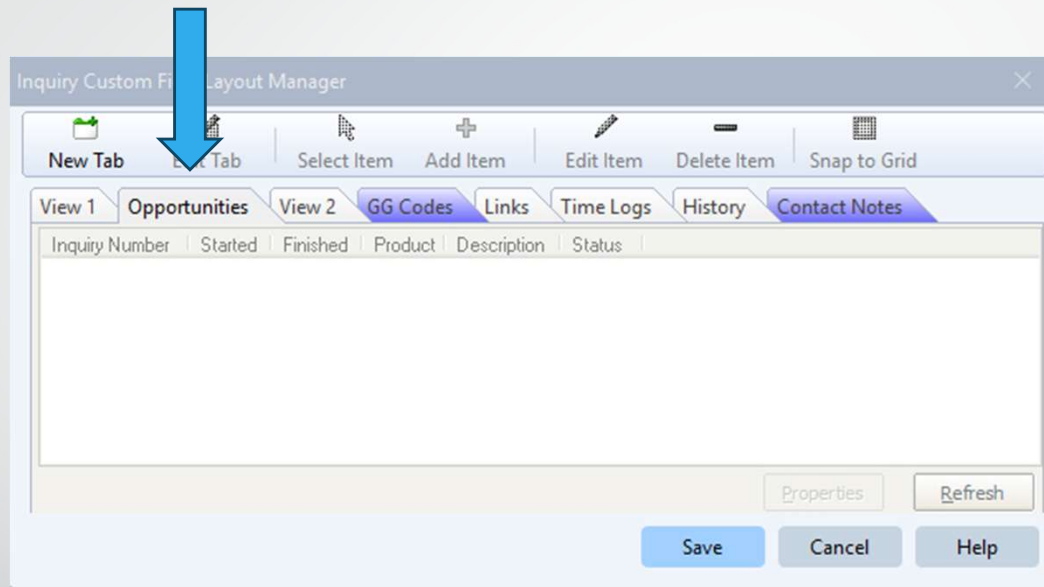


Click on New Tab option

Select from the Existing Systems/Pre-Designed Tab options > Opportunities > OK



You should now see the pre-designed tab. It will initially display at the end (far right). You can move the tab left to another position as desired



Click Save and exit configuration
Configuration completed

Sign into your client. You now have the **Opportunities Queue**. Here, you will be able to view, open, edit opportunities without opening the inquiry.

NOTE: You cannot create opportunities from the queue view. You can only create opportunities from an open inquiry.

File Reports Launch Options Help Total Contacts with HelpDesk Solution 202

≡ Total Contacts with HelpDesk Solution - Opportunities

Display: [dropdown] Gross Total: \$ 0.00

Opportunity Name	Status	Assigned To	Price	Count	Adjustment	Gross
Initial GO-Global 30 Seats	Quote	Josie Bell	\$55.00	30	\$0.00	\$1,650.00
Swith To Subscription 10 seats	Quote	Josie Bell	\$55.00	10	\$0.00	\$550.00
Quote 30 Seats for Server BLUE	Quote	Josie Bell	\$150.00	30	\$500.00	\$4,500.00

Accessing Opportunities from the Open Inquiry. You can open existing opportunities or create a new opportunity.

The screenshot displays a software interface for managing inquiries. The main window is titled 'Inquiry 1-0982'. It features a top toolbar with various icons for navigation and actions. Below the toolbar, there are several input fields for contact information (Contact: ADMIN, Company: Resource Dynamics for Testing, Phone #: 727-504-1908, Extension, EMail: admin@resource-dynamics.com) and a 'User Fields' button. To the right, there are dropdown menus for Category (HelpDesk), Product (HelpDesk), Description (Opportunities), Status (Internal), Priority (Internal), and Due Date. Further right, there are time-related fields: Time Opened (55 d 2 h 40 m) and Time Worked (21 d 0 h 50 m), along with a 'Billable' checkbox and a 'Flag' dropdown.

Below these fields, there are tabs for 'View 1 Opportunities', 'View 2 GG Codes', 'Links', 'Timelogs', 'History', and 'Contact Notes'. A table lists the opportunity details:

Opportunity Name	Status	Assigned To	Price	Count	Adjustment	Gross
Quote 30 Seats for Server BLUE	Quote	Josie Bell	\$150.00	30	\$500.00	\$4,500.00

An 'Edit Opportunity' dialog box is open, showing the following details:

- General:** Name: Quote 30 Seats for Server BLUE, Status: Quote, Inquiry #: 1-0982, Status On: Today 10:32:47 AM, Contact: ADMIN, Assigned To: Josie Bell, Company: Resource Dynamics for Testing.
- Amounts:** A table showing financial details:

Quantity	Item Price	Gross Total	Adjustment	Reseller	Net Total
30	150.00	4,500.00	500.00	500.00	3,500.00
- Dates:** Fields for 'Invoiced' and 'Purchased' dates.
- Notes:** A note from Josie Bell dated 4/27/2026 at 10:31 AM: 'Providing quote for server BLUE.'

On the right side of the interface, there are several buttons: 'Hot Tips', 'Known Issues', 'Search', 'EMail', 'Print', 'Launch', 'Add Note', and 'Finish'. A timer at the bottom right shows '00:00:15'.

Enjoy this new feature!!



If you have any questions, please don't hesitate to reach out to our team

customerservice@resource-dynamics.com

We are available Monday-Friday 8am-4pm EST
[Excluding scheduled holidays](#)