Total Contacts with HelpDesk Solution

Version 7

OPPORTUNITIES
Instructions

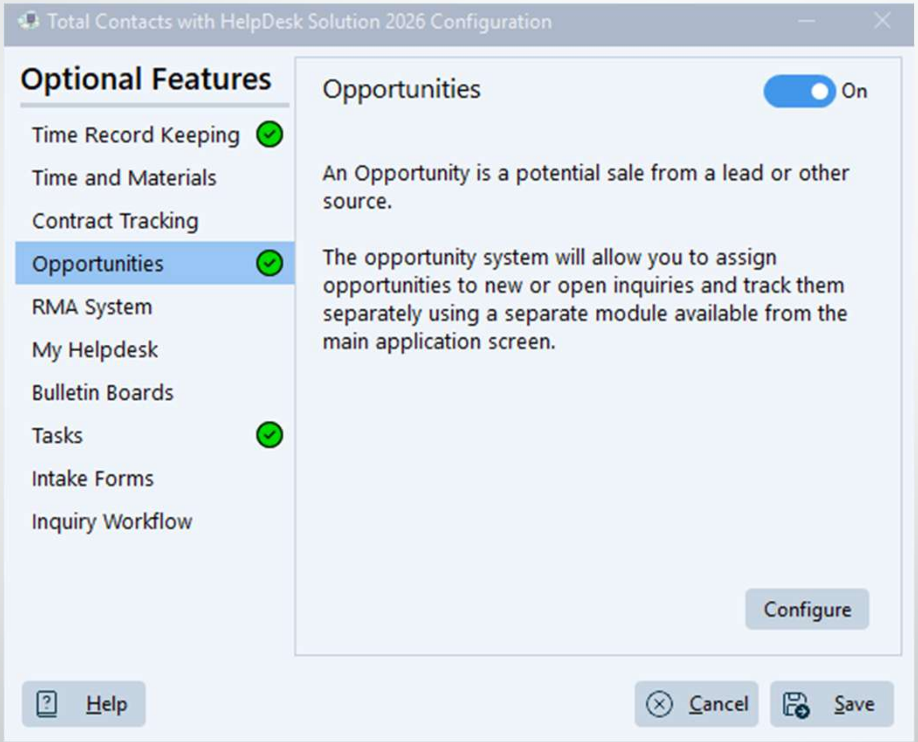
Keeping tack of quotes and sales can be a daunting task. With Total Contacts, we have designed this feature to be user friendly.

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

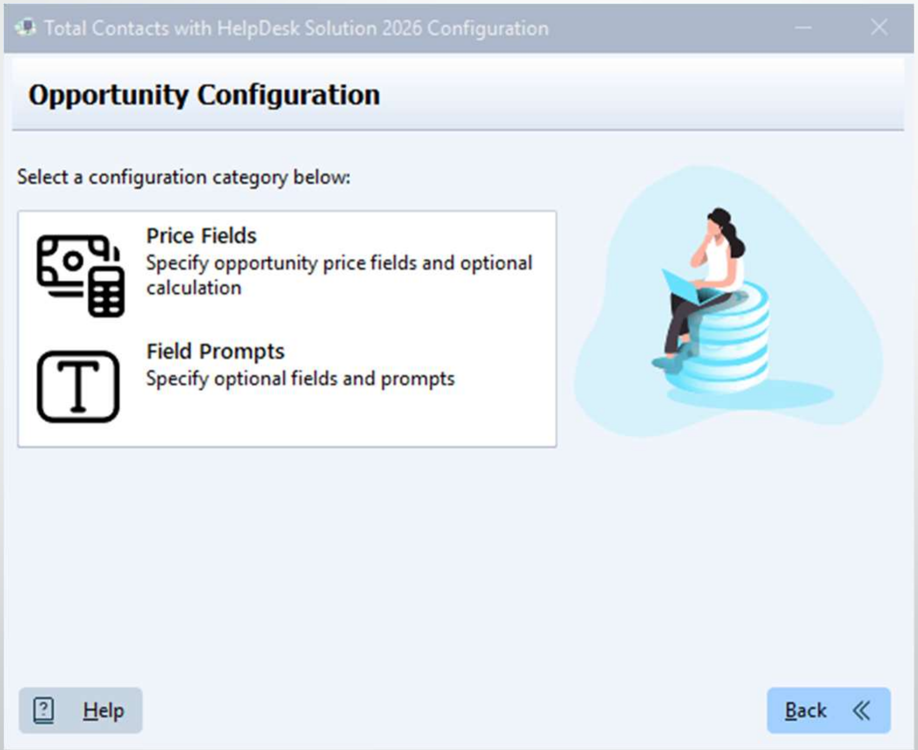
Opportunities are linked to Inquiries for tracking.

Let's get started.....

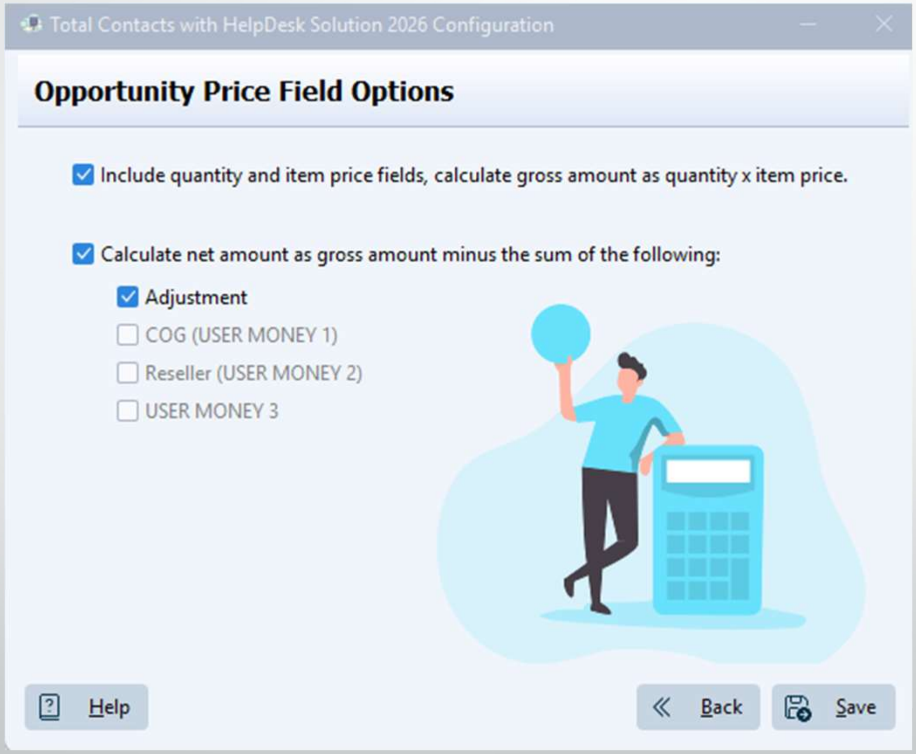
First is to enable the feature. Launch configuration > Optional Features > select Opportunities and enable and click configure button



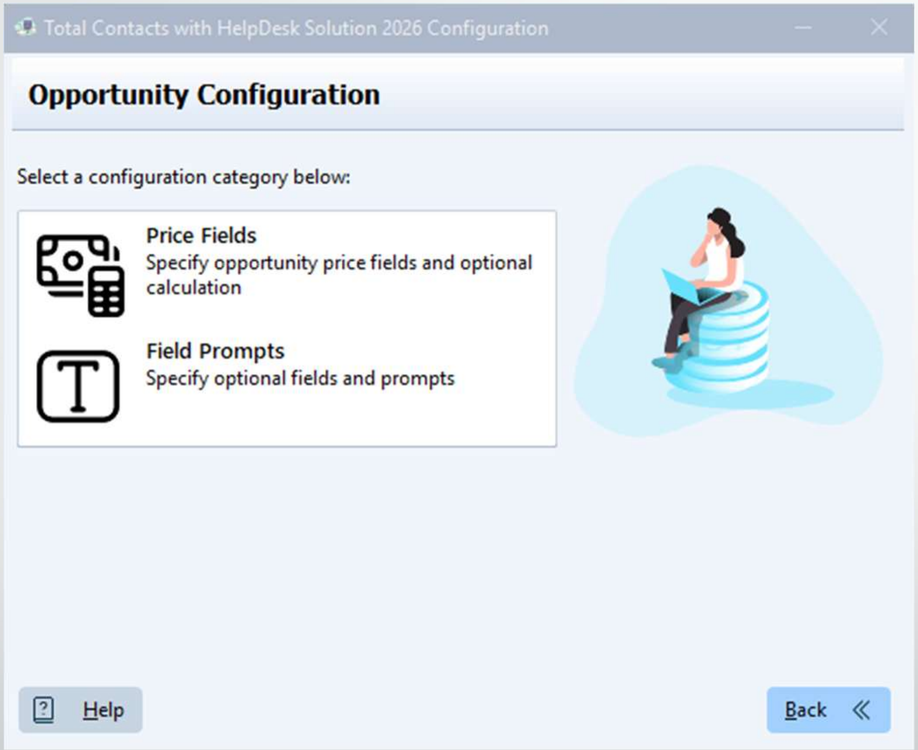
Select Price Fields



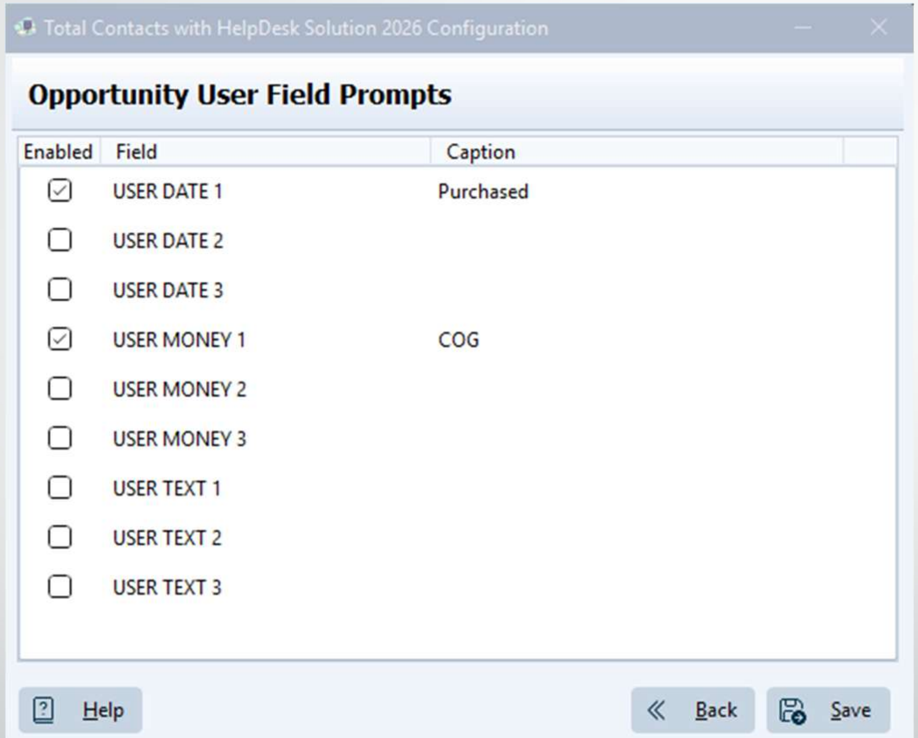
The default fields are quantity and price, which calculate gross. If you want/need to view 'net' amount, you can add additional fields. We included a field labeled adjustment, which will subtract from the gross amount. Any additional fields will also subtract from gross.



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

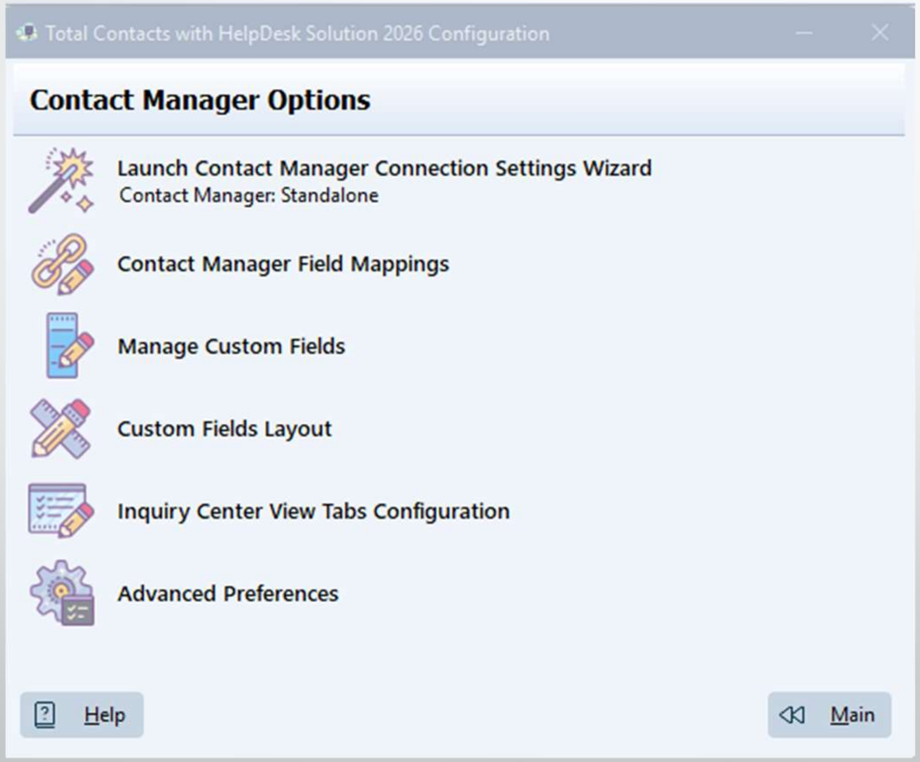


We have provided three custom date fields, three money fields which will subtract off gross amount, and three user text fields for notes.

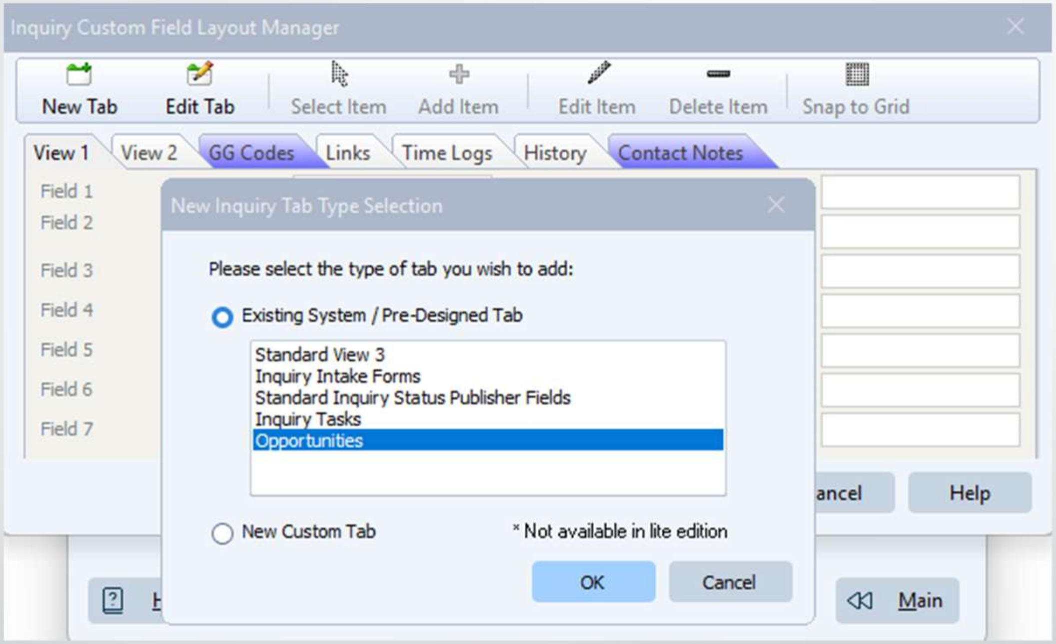


Now that you have enabled and configured OPPORTUNITIES, now we need to configure the feature to be accessible from the client view.

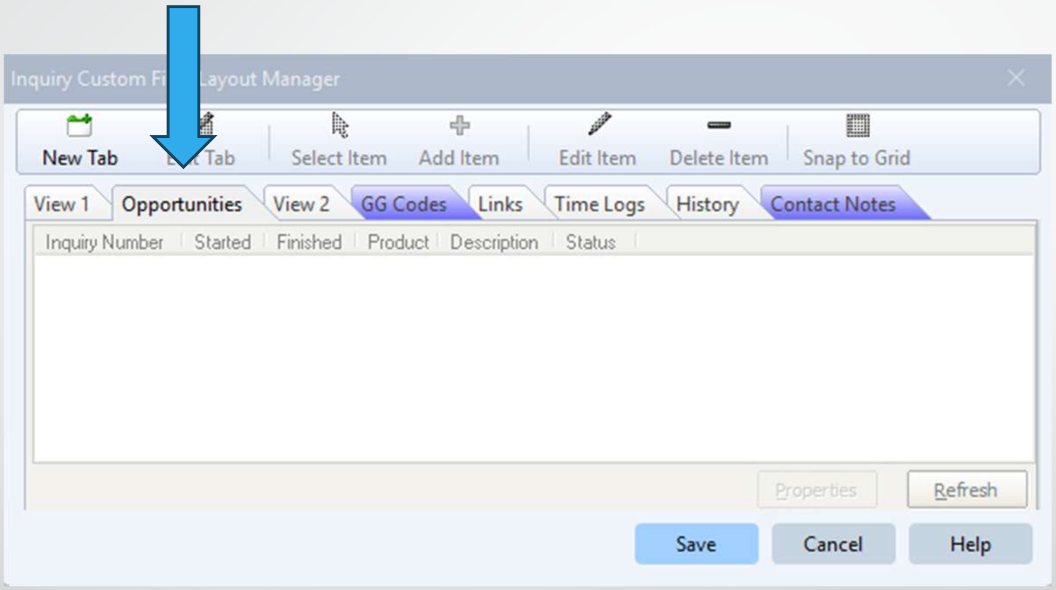
Go into Total Contacts main configuration > Contact Manager > Inquiry Center View Tabs Configuration



Click on New Tab option
Select from the Existing Systems/Pre-Designed Tab options > Opportunities > OK



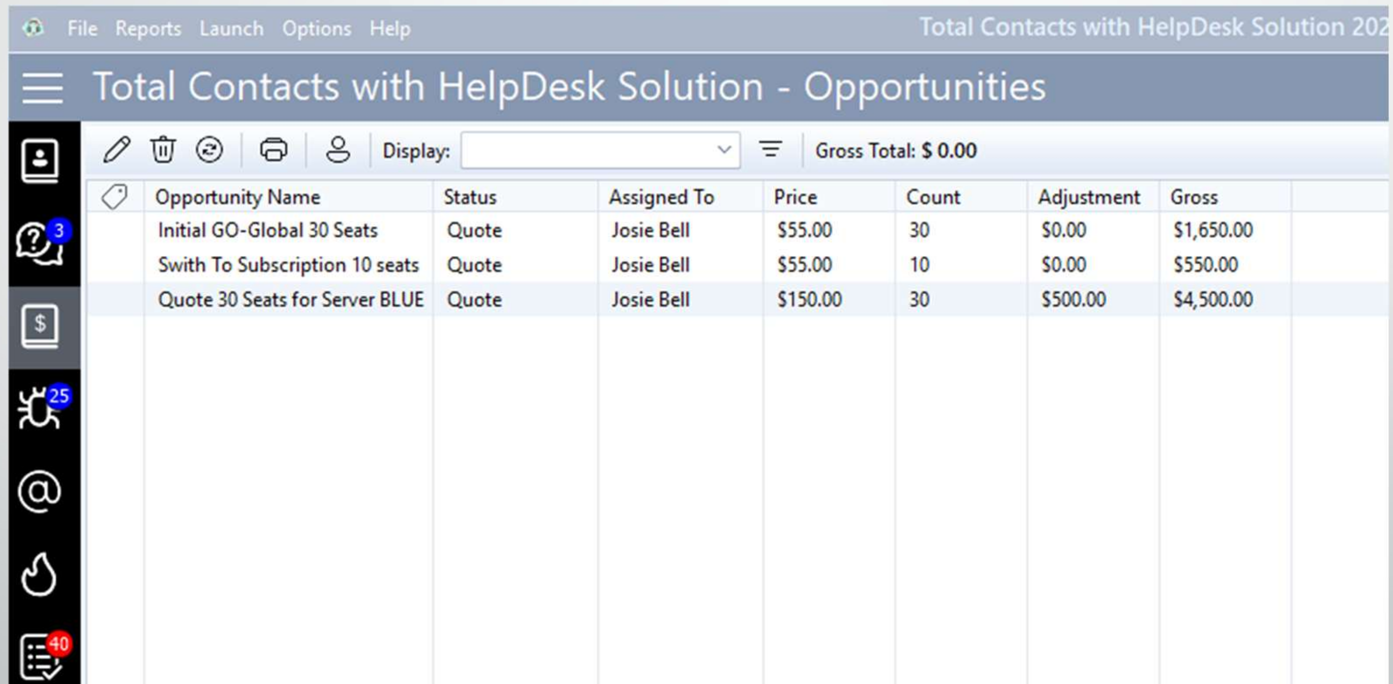
You should now see the pre-designed tab. It will initially display at the end (far right). You can move the tab left to another position as desired



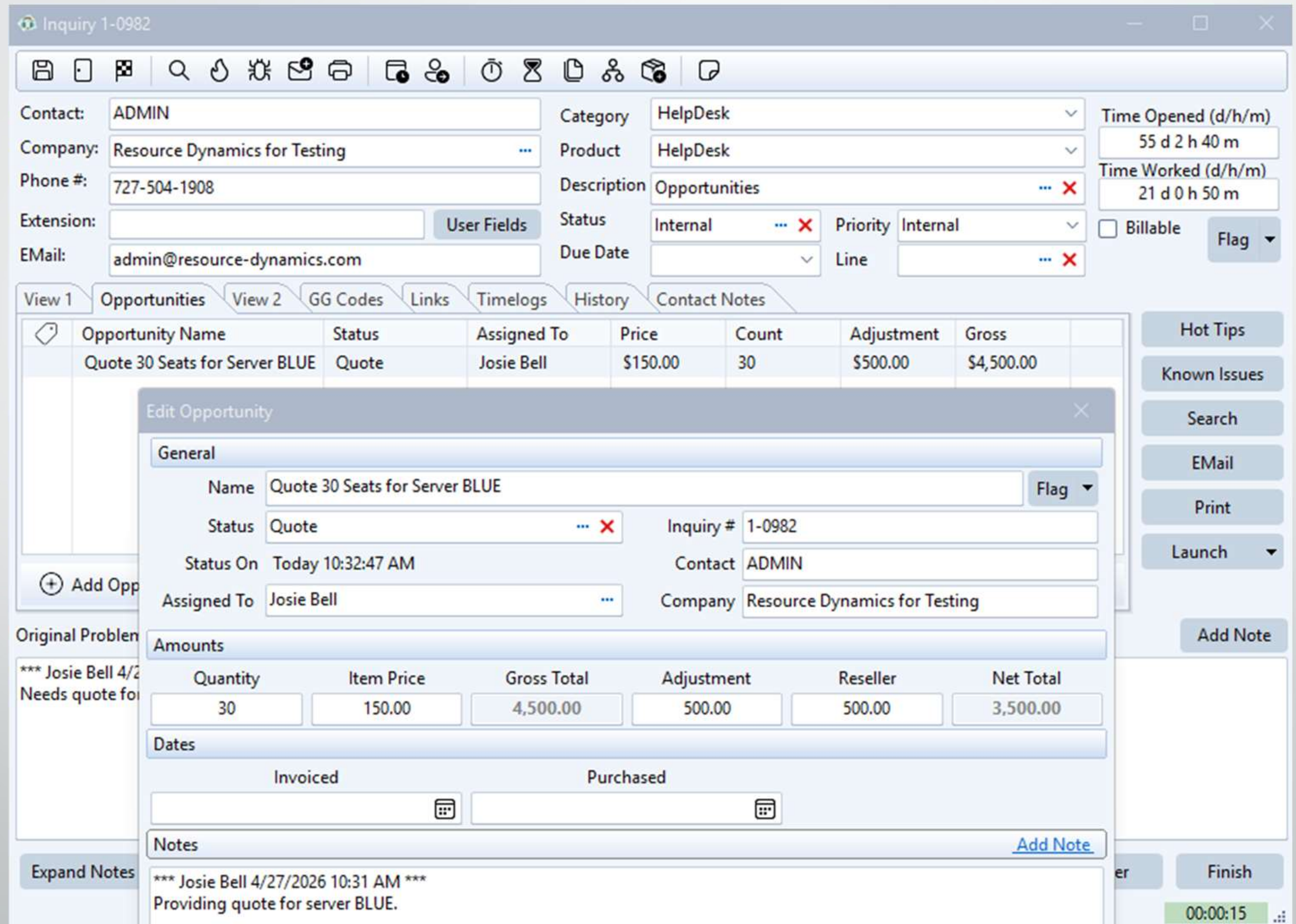
Click Save and exit configuration
Configuration completed

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.



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



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