

*Exchange***W!se**

MESSAGING, COLLABORATION AND CRM SPECIALISTS

MX-Contact

Sales Module Tutorial



**The complete Customer Relationship,
Contact Management
and
Sales Automation System
for
Microsoft Outlook**

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1 The MX-Contact Sales Module Tutorial - Introduction

The Sales Module consists of the following Items:

1. **Product File**
[Tutorial Exercises - Products](#)
2. **Opportunities**
[Tutorial Exercises – Opportunities](#)
3. **Orders**
[Tutorial Exercises – Orders](#)
4. **Projects**
[Tutorial Exercises – Projects](#)
5. **Sales Plans**
[Tutorial Exercises – Sales Plans](#)

Please note the **exercises are designed to be done in sequence**, as exercises in the later sections depend on data that is added earlier in the tutorial. Also, these exercises assume that you have at least completed the exercises in section 2 of the Base System tutorial, namely Database Exercises. References are made in this tutorial to the Companies and Contacts that are added as part of those exercises.

Note that for the e-mail exercises, please set Outlook's **Mail Format** (under **Tools, Options**) to **Rich Text**, and **do not set** Microsoft Word as your E-Mail Editor.

2 Tutorial Exercises - Products

The Products Folder stores details of the products/services that your company sells. This folder is for keeping details of not only major items (systems) but also Line Items that can be attached to systems as well as parts that might be used to repair faulty units (for cases where this is applicable).

In this section you will do the following exercises:

1. **Add a Product**

[Adding a Product: Exercise](#)

2. **Add a Second Product**

[Adding a Second Product: Exercise](#)

Once you have done these exercises you are ready to learn about adding Opportunities to companies and contacts. ([Tutorial Exercises – Opportunities](#))

2.1 Adding a Product: Exercise

Add the HP Pavilion Notebook to the Product Register

Complete the following information:

Product Code:	Zv5022AP
Description:	HP Pavilion Notebook
Type:	Product Type 1
Family:	Product Family 1
Group:	Product Group 1
Cost Price:	\$1793
Selling Price:	\$2015

Show me the **Solution** ([Adding a Product: Solution](#))

2.2 Adding a Product: Solution

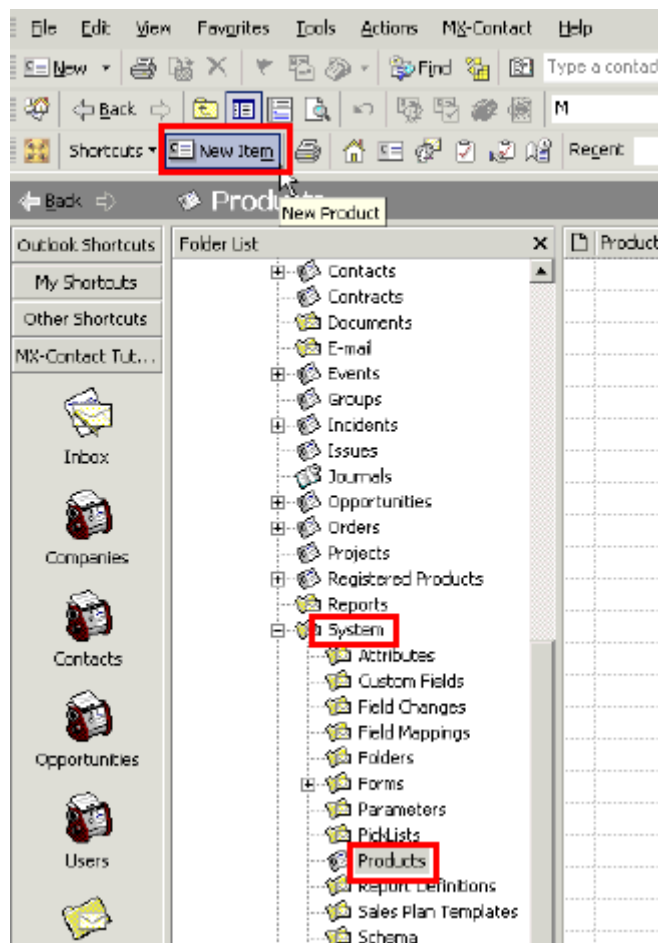
Add the HP Pavilion Notebook to the Product Register

Complete the following information:

Product Code:	Zv5022AP
Description:	HP Pavilion Notebook
Type:	Product Type 1
Family:	Product Family 1
Group:	Product Group 1
Cost Price:	\$1793
Selling Price:	\$2015

Basic Steps:

1. Select the **System Folder** and then the **Product Sub-Folder**. Click on the **New Item** button.



2. A blank **Product Form** will open:

The screenshot shows a software window titled "Untitled - Product". It features a menu bar with "File", "Edit", "View", "Insert", "Tools", "Actions", and "Help". Below the menu is a toolbar with icons for "Save and Close", "Print", "Copy", "Paste", "Undo", "Redo", "Zoom", and "Refresh". The main area contains several sections of form fields:

- Product Code:** Text input field.
- Description:** Text input field.
- Type:** Dropdown menu.
- Family:** Dropdown menu.
- Group:** Dropdown menu.
- Unit:** Dropdown menu.
- Volume:** Text input field with value "0".
- Weight:** Text input field with value "0".
- In Stock:** Check box (unchecked).
- Taxable:** Check box (unchecked).
- Status:** Dropdown menu.
- Warehouse:** Dropdown menu.
- Vendor:** Dropdown menu.
- Supplier:** Dropdown menu.
- Cost Price:** Text input field with value "\$0.00".
- Selling Price:** Text input field with value "\$0.00".
- Notes:** Large text area for notes.

- In the **New Product** form, add the details for the HP Pavilion Notebook:

Complete the following information:

Product Code:	Zv5022AP
Description:	HP Pavilion Notebook
Type:	Product Type 1
Family:	Product Family 1
Group:	Product Group 1
Cost Price:	\$1793
Selling Price:	\$2015

The screenshot shows a software window titled "zv5022AP - Product". The window has a menu bar with "File", "Edit", "View", "Insert", "Tools", "Actions", and "Help". Below the menu bar is a toolbar with icons for "Save and Close", "Print", "Copy", "Paste", "Undo", "Redo", "Refresh", "Home", "Back", and "Forward". The form contains the following fields:

Product Code:	zv5022AP	Type:	Product Type 1
Description:	HP Pavilion Notebook	Family:	Product Family 1
Product ID:		Group:	Product Group 1
Unit:		Status:	
Volume:	0	Warehouse:	
Weight:	0	Vendor:	
In Stock:	<input type="checkbox"/>	Supplier:	
Taxable:	<input type="checkbox"/>		
Cost Price:	\$1,793.00	Selling Price:	\$2,015.00

Notes:

4. Click **Save and Close**.

Take me to the next **Exercise** ([Adding a Second Product: Exercise](#))

2.3 Adding a Second Product: Exercise

Add the Microsoft Optical Mouse to the Product Register.

Complete the following information:

Product Code:	ITE78CJ
Description:	Microsoft Optical Mouse
Type:	Product Type 2
Family:	Product Family 2
Group:	Product Group 2
Cost Price:	\$43
Selling Price:	\$55

Show me the **Solution** ([Adding a Second Product: Solution](#))

2.4 Adding a Second Product: Solution

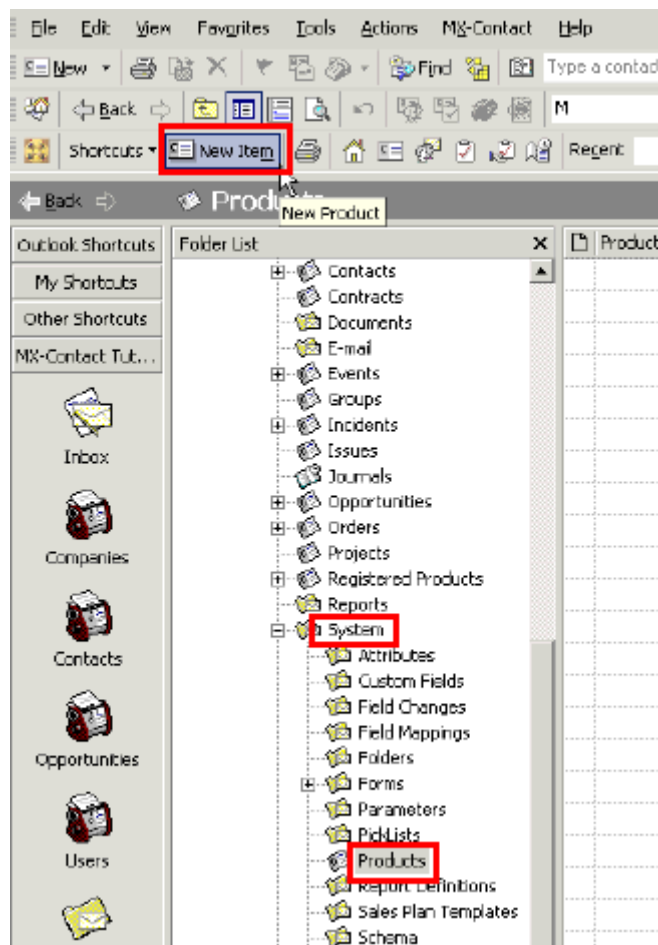
Add the Microsoft Optical Mouse to the Product Register.

Complete the following information:

Product Code:	ITE78CJ
Description:	Microsoft Optical Mouse
Type:	Product Type 2
Family:	Product Family 2
Group:	Product Group 2
Cost Price:	\$43
Selling Price:	\$55

Basic Steps:

1. Select the **System Folder** and then the **Product Sub-Folder**. Click on the **New Item** button.



2. A blank **Product Form** will open:

The screenshot shows a software window titled "Untitled - Product". It features a menu bar with "File", "Edit", "View", "Insert", "Tools", "Actions", and "Help". Below the menu is a toolbar with icons for "Save and Close", "Print", "Copy", "Paste", "Undo", "Redo", "Zoom In", "Zoom Out", and "Reset". The main area contains several input fields and dropdown menus:

- Product Code: [Text Field]
- Description: [Text Field]
- Product ID: [Text Field]
- Type: [Dropdown Menu]
- Family: [Dropdown Menu]
- Group: [Dropdown Menu]
- Unit: [Dropdown Menu]
- Volume: [Text Field with 0]
- Weight: [Text Field with 0]
- Status: [Dropdown Menu]
- Warehouse: [Dropdown Menu]
- Vendor: [Dropdown Menu]
- Supplier: [Dropdown Menu]
- In Stock:
- Taxable:
- Cost Price: [Text Field] \$0.00
- Selling Price: [Text Field] \$0.00
- Notes: [Text Area]

3. In the **New Product** form, add the details for the Microsoft Optical Mouse.

Complete the following information:

Product Code:	ITE78CJ
Description:	Microsoft Optical Mouse
Type:	Product Type 2
Family:	Product Family 2
Group:	Product Group 2
Cost Price:	\$43
Selling Price:	\$55

The screenshot shows a software window titled "ITE78CJ - Product". The window has a menu bar with "File", "Edit", "View", "Insert", "Tools", "Actions", and "Help". Below the menu bar is a toolbar with various icons, including a "Save and Close" button. The main area of the window is a form with the following fields:

Product Code:	ITE78CJ	Type:	Product Type 2
Description:	Microsoft Optical Mouse	Family:	Product Family 2
Product ID:		Group:	Product Group 2
Unit:		Status:	
Volume:	0	Warehouse:	
Weight:	0	Vendor:	
In Stock:	<input type="checkbox"/>	Supplier:	
Taxable:	<input type="checkbox"/>		
Cost Price:	\$43.00	Selling Price:	\$55.00
Notes:			

4. Click **Save and Close**.

Take me back to the Exercise ([Adding a Second Product: Exercise](#))

Take me to the next Exercise ([Tutorial Exercises – Opportunities](#))

3 Tutorial Exercises – Opportunities

In this section you will do the following exercises:

1. **Adding an Opportunity from a Company**
[Adding an Opportunity from a Company: Exercise](#)
2. **Adding an Opportunity**
[Adding an Opportunity: Exercise](#)
3. **Linking an Opportunity to a Contract**
[Linking an Opportunity to a Contract: Exercise](#)
4. **Adding a Journal Entry to an Opportunity**
[Adding a Journal Entry to an Opportunity: Exercise](#)
5. **Adding Opportunities to the Link Items Menu**
[Adding Opportunities to the Link Items Menu: Exercise](#)
6. **Linking an E-Mail to an Opportunity**
[Linking an E-Mail to an Opportunity from Contacts: Exercise](#)
7. **Generating a Document from an Opportunity**
[Generating a Document from an Opportunity: Exercise](#)
8. **Adding a Task to an Opportunity**
[Adding a Task to an Opportunity: Exercise](#)

Once you have done these exercises you are ready to learn about adding Orders to companies and opportunities. ([Tutorial Exercises – Orders](#))

3.1 Adding an Opportunity from a Company: Exercise

Add an opportunity from the Company Form.

Company:	Premier Foods
Opportunity:	5 new computers - Sales Department
Lead source:	Lead Source 1
Date Opened:	02/12/2004
Status:	Open
Probability:	75%
Expected Value:	\$20,000

Show me the **Solution** ([Adding an Opportunity from a Company: Solution](#))

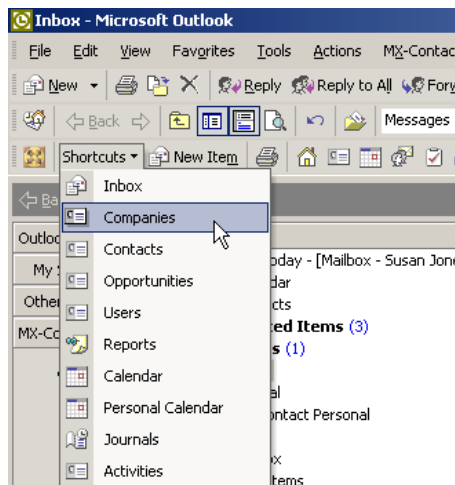
3.2 Adding an Opportunity from a Company: Solution

Add an opportunity from the Company Form.

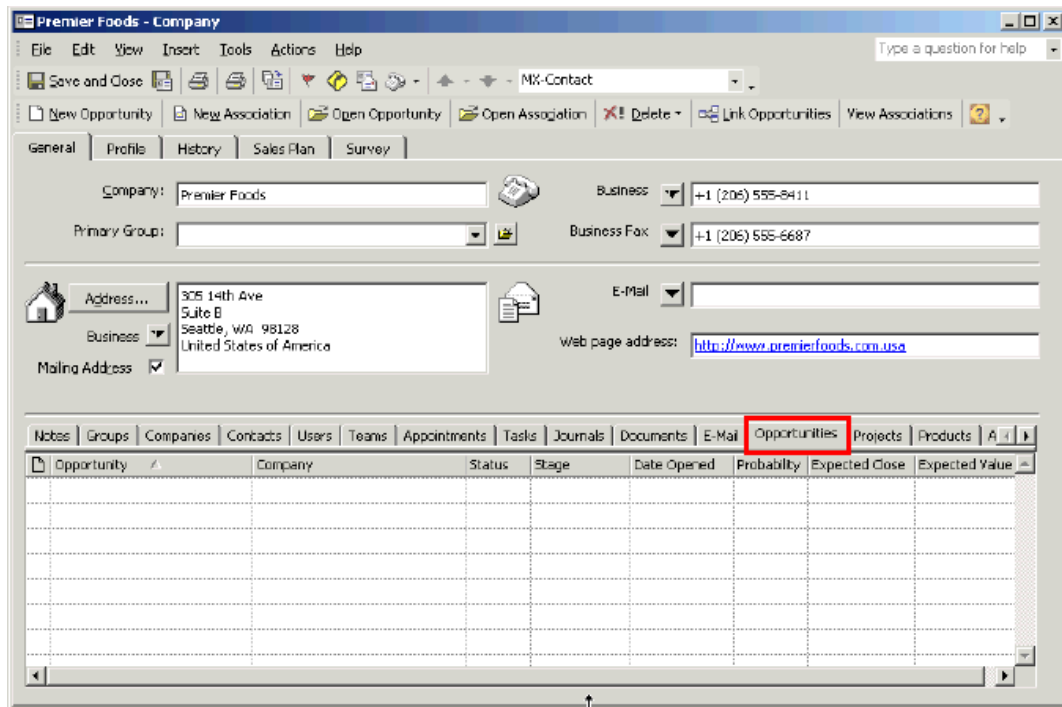
Company:	Premier Foods
Opportunity:	5 new computers - Sales Department
Lead source:	Lead Source 1
Date Opened:	02/12/2004
Status:	Open
Probability:	75%
Expected Value:	\$20,000

Basic Steps:

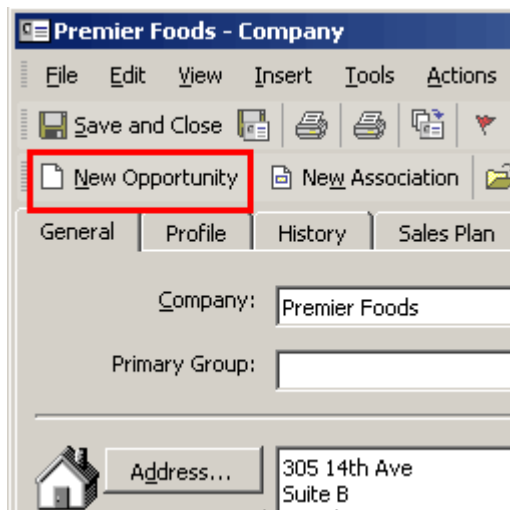
1. Select the **Companies** Shortcut from the **Shortcuts** Menu on the **MX-Contact** Toolbar:



2. Open the Company **Premier Foods**
3. Click on the **Opportunities** Tab:



4. Click on **New Opportunity** to add the opportunity:



A blank Opportunity Form will open with the Primary Company Name carried over. Enter **the opportunity** details on the **General Tab** as well as on the **Details Tab**.

5. Click **Save and Close** from the **Opportunity Form**. You should now see the opportunity in the **Opportunities Tab**:

General Profile

Company: Premier Foods Business +1 (206) 555-8411
Short/Other Name: Business Fax:
Primary User:
Primary Group:

Address... 305 14th Ave. Suite B, Seattle, WA 98128 United States of America E-mail:
Business Web page address: <http://www.premierfoods.com.usa>
Mailing Address Mail Server:

Notes Groups Companies Contacts Users Teams Appointments Tasks Journals Documents E-Mail Opportunities Project: < >

Opportunity /	Company	Status	Stage	Date Opened	Probability	Expected Close
Opportunity 100...	Premier Foods	Open		Sat 14/01/2006 ...	75	

1 Items SQL View Version: 6.3.49

6. Click **Save and Close** on the **Company Form**.

Take me back to the Exercise ([Adding an Opportunity from a Company: Exercise](#))

Take me to the next Exercise ([Adding an Opportunity: Exercise](#))

3.3 Adding an Opportunity: Exercise

Add the opportunity **Network Upgrade – 10 computers**.

Complete the following information on the **General** tab:

Opportunity:	Network Upgrade – 10 Computers
Lead source:	Lead Source 1
Date Opened:	02/12/2004
Type:	Opportunity Type 1
Status:	Open

Complete the following information on the **Details** tab:

Probability:	60%
Expected Value:	\$80,000

Show me the **Solution** ([Adding an Opportunity: Solution](#))

3.4 Adding an Opportunity: Solution

Add the opportunity **Network Upgrade – 10 computers**.

Complete the following information on the **General** tab:

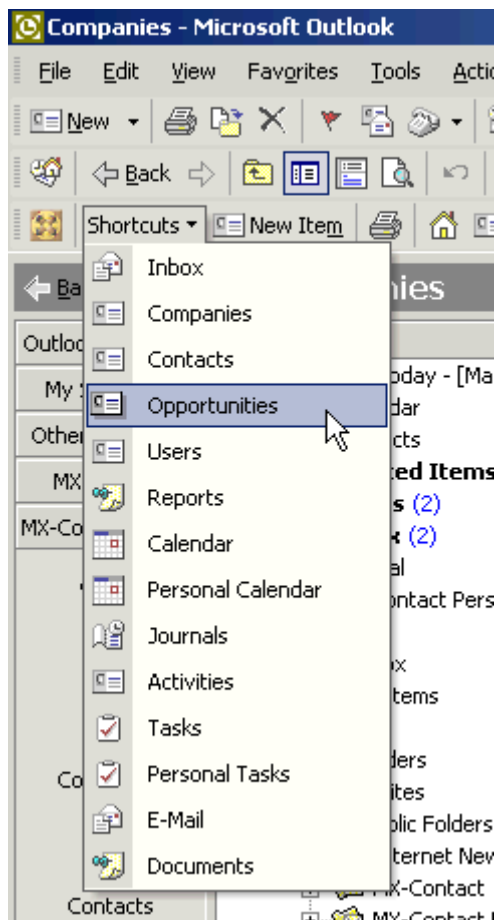
Opportunity:	Network Upgrade – 10 Computers
Lead source:	Lead Source 1
Date Opened:	02/12/2004
Type:	Opportunity Type 1
Status:	Open

Complete the following information on the **Details** tab:

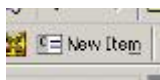
Probability:	60%
Expected Value:	\$80,000

Basic Steps:

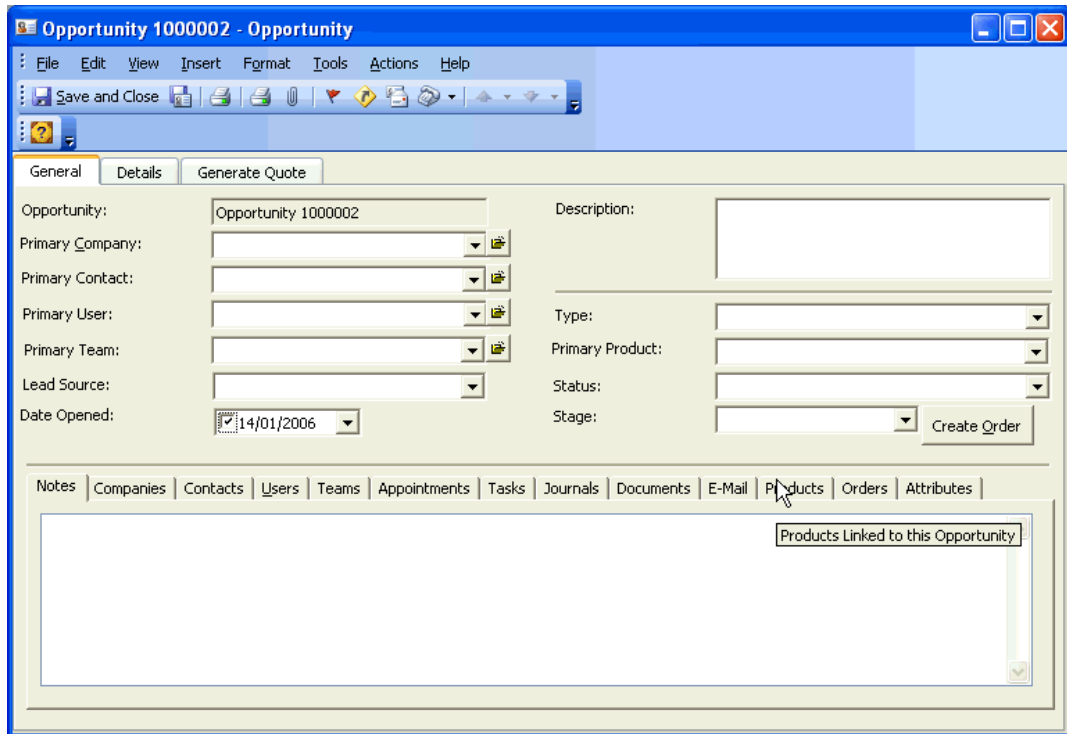
1. Select the **Opportunities** Shortcut from the **Shortcuts Menu** on the **MX-Contact Toolbar**:



2. Click on the **New Item** (Company) button on the **MX-Contact** Toolbar.



3. A blank **Opportunity Form** will open:



4. In the New Opportunity form, add the details for the Network Upgrade. Complete the following Information on the **General Tab**.

Opportunity:	Network Upgrade – 10 Computers
Lead source:	Lead Source 1
Date Opened:	02/12/2004
Type:	Opportunity Type 1
Status:	Open

5. Enter the details for the **Details Tab**:

Probability:	60%
Expected Value:	\$80,000

6. Click **Save and Close**.

Take me to the next **Exercise** ([Linking an Opportunity to a Contact: Exercise](#))

3.5 Linking an Opportunity to a Contact: Exercise

Link an opportunity to a contact:

Opportunity Name:	Network Upgrade – 10 Computers
--------------------------	---------------------------------------

Contact:	Barney Anderson
-----------------	------------------------

Link the opportunity “Network Upgrade – 10 Computers” to the contact **Barney Anderson**.

Show me the **Solution** ([Linking an Opportunity to a Contact: Solution](#))

3.6 Linking an Opportunity to a Contact: Solution

Link an opportunity to a contact:

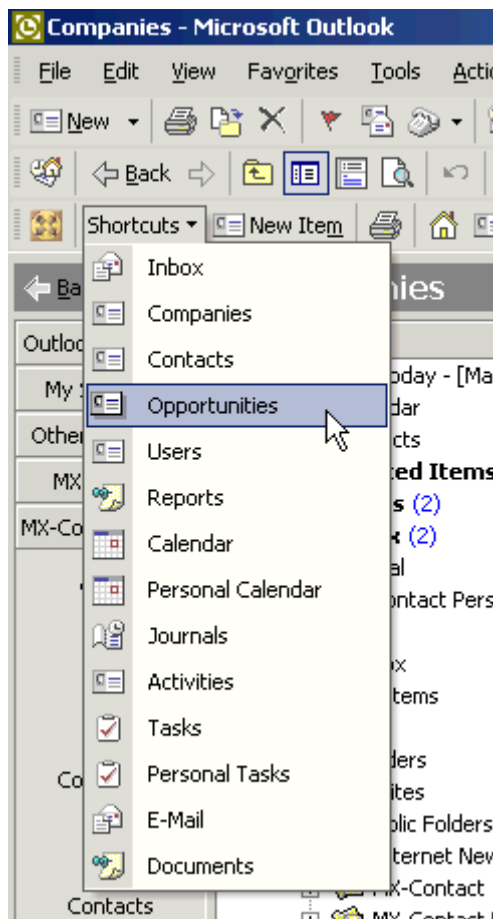
Opportunity Name:	Network Upgrade – 10 Computers
--------------------------	---------------------------------------

Contact:	Barney Anderson
-----------------	------------------------

Link the opportunity “Network Upgrade – 10 Computers” to the contact **Barney Anderson**.

Basic Steps:

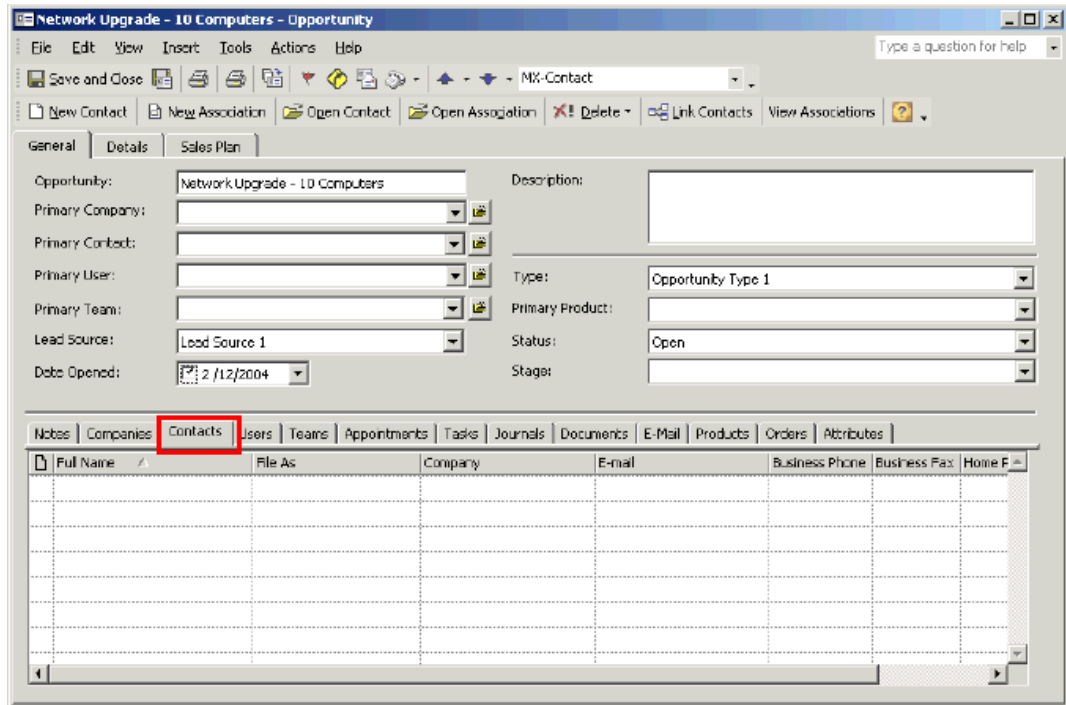
1. Select the **Opportunities** Shortcut from the **Shortcuts** Menu on the **MX-Contact** Toolbar:



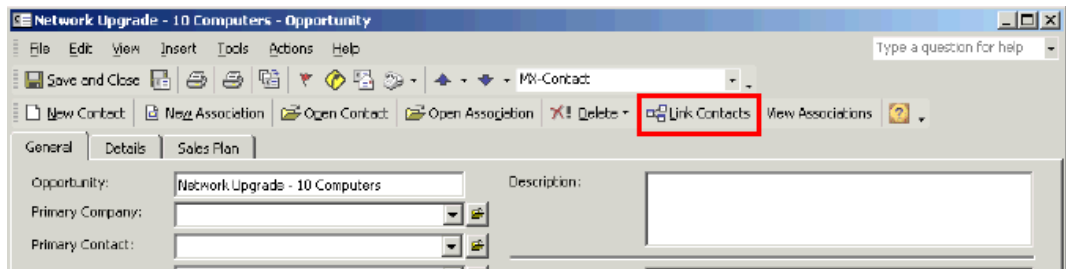
2. Open the following opportunity:

Opportunity Name:	Network Upgrade – 10 Computers
--------------------------	---------------------------------------

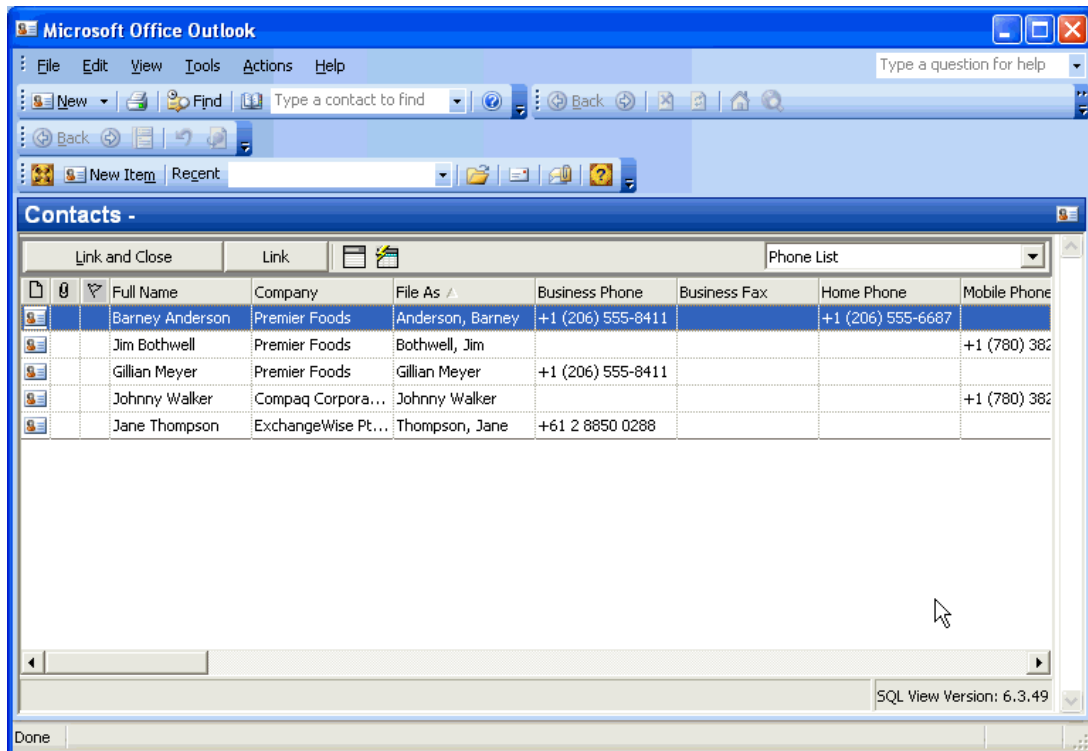
3. Click on the **Contacts Tab**.



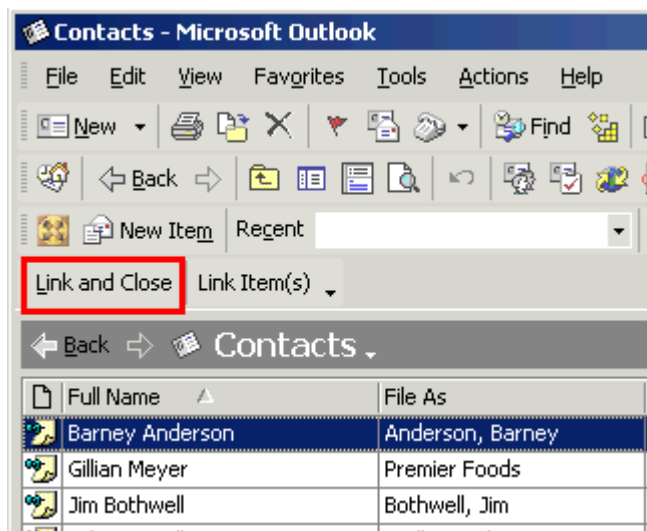
4. Click on the **Link Contacts** button.



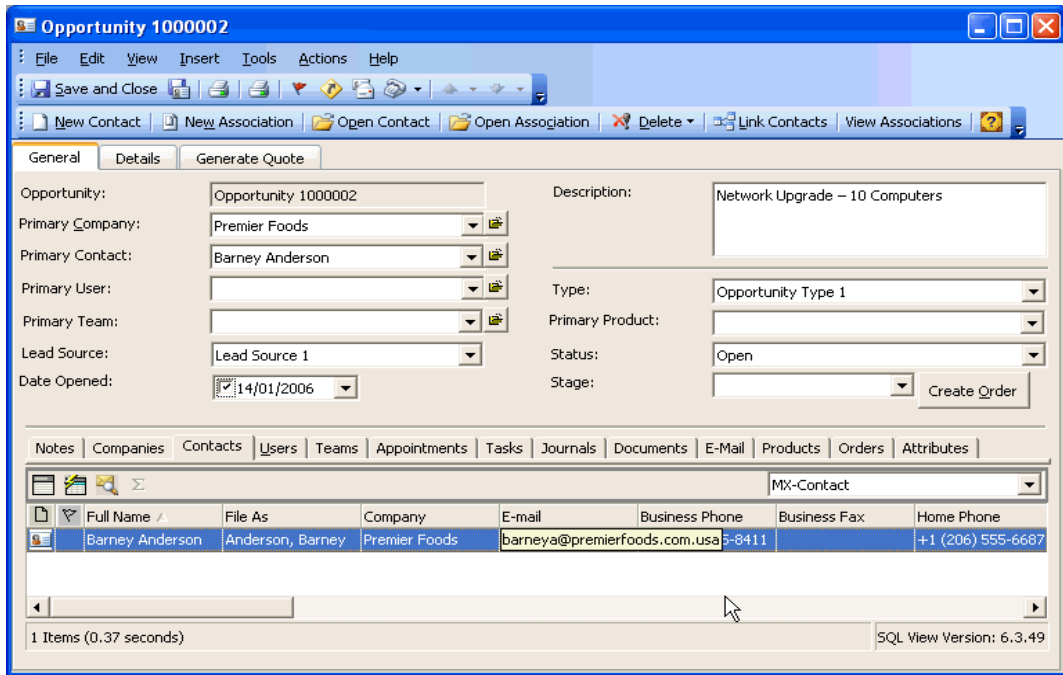
5. Search for and highlight Barney Anderson.



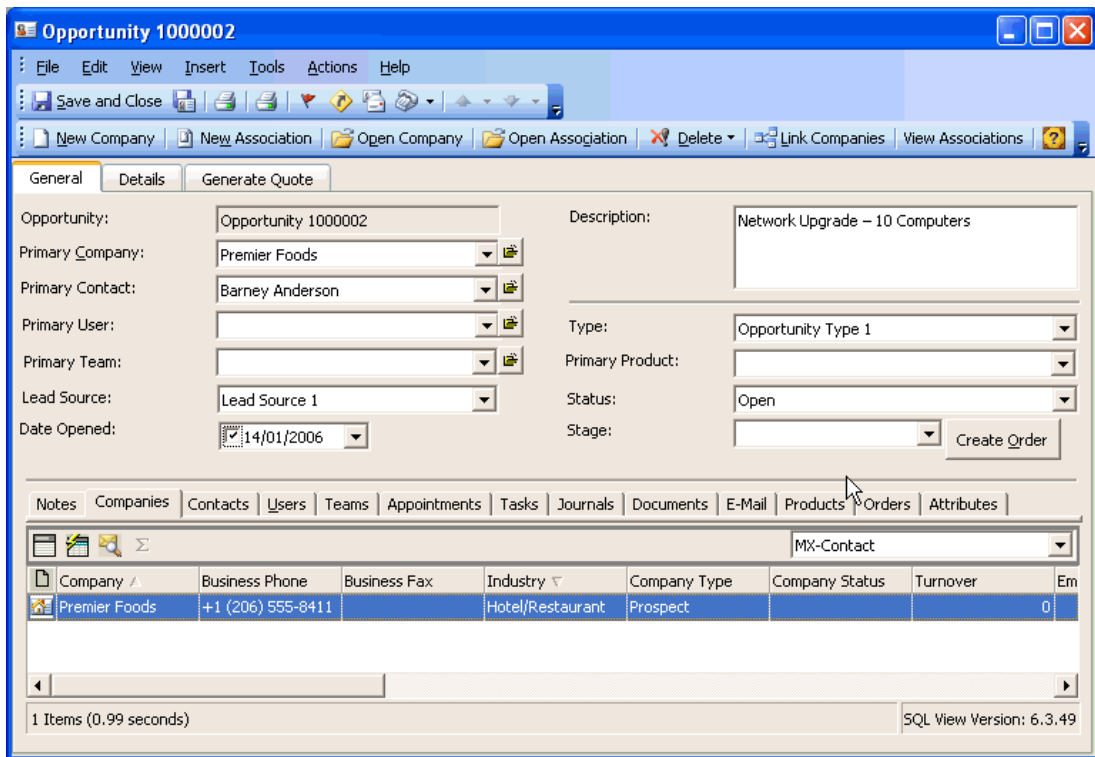
6. Click **Link and Close**.



7. You should now see **Barney Anderson** linked to the opportunity **“Upgrade Network – 10 Computers”** in the **Contacts** Tab:



- If contact person is associated with a company that company will automatically be linked to the opportunity. You should see that company on the **Companies Tab**.



- Click **Save and Close** on the **Contact Form**.

Take me back to the Exercise ([Linking an Opportunity to a Contact: Exercise](#))

Take me to the next Exercise ([Adding a Journal Entry to an Opportunity: Exercise](#))

3.7 Adding a Journal Entry to an Opportunity: Exercise

You receive a telephone call from Barney Anderson who has received your proposal and your follow up e-mail. He had some additional questions about commercial terms and conditions. Add a journal to the opportunity to record the details of this call.

Complete the following information:

Opportunity:	Network Upgrade – 10 Computers
Subject:	Called about terms and conditions
Entry Type:	Phone Call
Duration:	15 mins
Memo:	Barney wanted to know if they could have 30 day payment terms. Said this was standard with all their suppliers. I told him there should be no problem with this, Premier would just need to fill out the standard Credit Application Form.
Regarding:	Discuss Status
Category:	Sales - Prospect

Show me the **Solution** ([Adding a Journal Entry to an Opportunity: Solution](#))

3.8 Adding a Journal Entry to an Opportunity: Solution

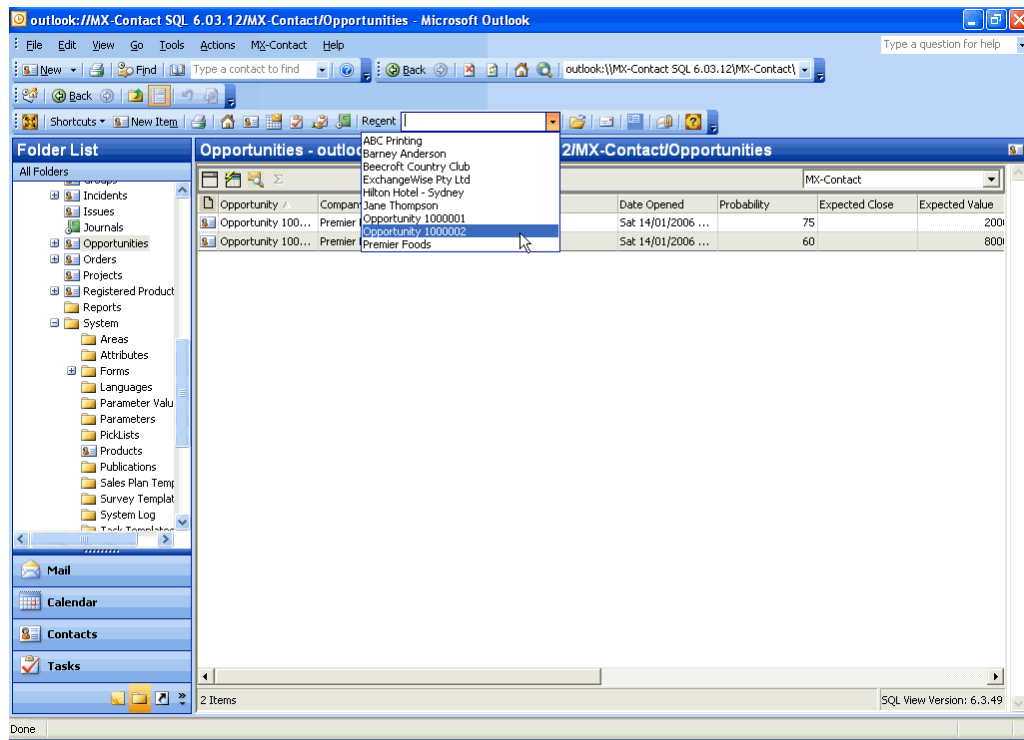
You receive a telephone call from Barney Anderson who has received your proposal and your follow up e-mail. He had some additional questions about commercial terms and conditions. Add a journal to the opportunity to record the details of this call.

Complete the following information:

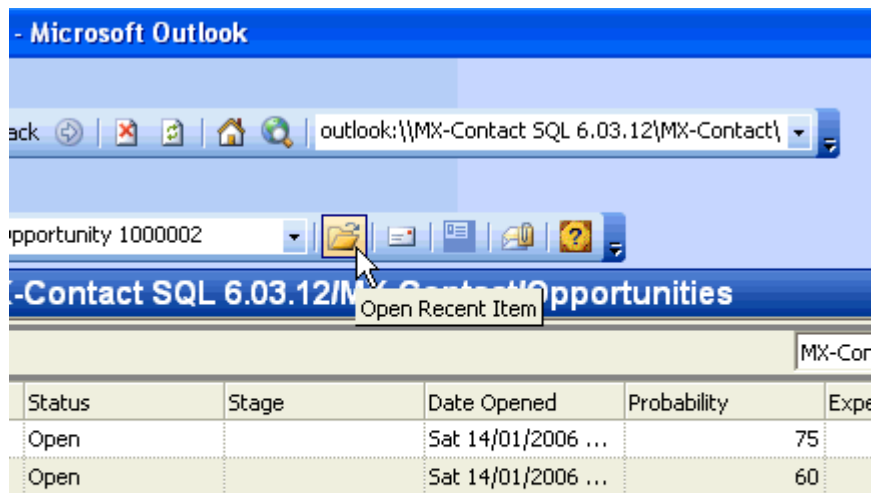
Opportunity:	Network Upgrade – 10 Computers
Subject:	Called about terms and conditions
Entry Type:	Phone Call
Duration:	15 mins
Memo:	Barney wanted to know if they could have 30 day payment terms. Said this was standard with all their suppliers. I told him there should be no problem with this, Premier would just need to fill out the standard Credit Application Form.
Regarding:	Discuss Status
Category:	Sales - Prospect

Basic Steps:

1. Open the opportunity "Opportunity 1000002" (try this from Recent Items). Click on the **Recent Items** drop down list and select "Upgrade Network – 10 Computers".



2. Click on the **Open Recent Item** button.



3. Click on the **Journals Tab**
4. Click on **New Journal**:

Opportunity 1000002

File Edit View Insert Tools Actions Help

Save and Close New Journal Open Journal Delete Link Journals

General Det New Journal Generate Quote

Opportunity: Opportunity 1000002 Description:

Primary Company: Premier Foods

Primary Contact: Barney Anderson

Primary User:

Primary Team:

Lead Source: Lead Source 1 Type:

Date Opened: 14/01/2006 Primary Product:

Status:

Stage:

Notes Companies Contacts Users Teams Appointments Tasks Journals Doc

5. Enter the **Journal** Details:

Called about terms and conditions - Journal

File Edit View Insert Format Tools Actions Help

Status: Regarding: Discuss Status Category: Sales - Prospect

Links Opportunity 1000002 Open Remove Link Regent Related Items

Subject: Called about terms and conditions

Entry type: Phone call Company: Premier Foods

Start time: Sat 14/01/2006 3:23 PM Start Timer

Duration: 15 minutes Pause Timer

Barney wanted to know if they could have 30 day payment terms. Said this was standard with all their suppliers. I told him there should be no problem with this, Premier would just need to fill out the standard Credit Application Form.

Contacts... Categories... Private

6. Click **Save and Close** on the **Journal**. You should see the journal entry on the opportunity's **Journal** tab.

The screenshot shows the 'Opportunity 1000002' window in the MX-Contact application. The window has a menu bar (File, Edit, View, Insert, Tools, Actions, Help) and a toolbar with buttons for 'Save and Close', 'New Journal', 'Open Journal', 'Delete', and 'Link Journals'. Below the toolbar are tabs for 'General', 'Details', and 'Generate Quote'. The 'General' tab is active, displaying the following fields:

- Opportunity: Opportunity 1000002
- Description: Network Upgrade – 10 Computers
- Primary Company: Premier Foods
- Primary Contact: Barney Anderson
- Primary User: [Empty]
- Primary Team: [Empty]
- Lead Source: Lead Source 1
- Date Opened: 14/01/2006
- Type: Opportunity Type 1
- Primary Product: [Empty]
- Status: Open
- Stage: [Empty]

At the bottom of the window, there is a navigation bar with tabs for 'Notes', 'Companies', 'Contacts', 'Users', 'Teams', 'Appointments', 'Tasks', 'Journals', 'Documents', 'E-Mail', 'Products', 'Orders', and 'Attributes'. Below this is a table with a search filter 'MX-Contact' and a table with the following data:

Company	User	Start	Duration	Entry Type	Subject
Premier Foods	Jane Thompson	Sat 14/01/2006 15:2...	15 minutes	Phone Call	Called about terms a...

At the bottom left, it says '1 Items' and at the bottom right, 'SQL View Version: 6.3.49'.

7. Click **Save and Close** on the **Opportunity**.

Take me back to the Exercise ([Adding a Journal Entry to an Opportunity: Exercise](#))

Take me to the next Exercise ([Adding Opportunities to the Link Items Menu: Exercise](#))

3.9 Adding Opportunities to the Link Items Menu: Exercise

If you are working on public folders, you will only be able to complete this exercise if you have administrator rights.

You want add opportunities to the Link Items Menu.

Link Items Menu:	Opportunities
-------------------------	----------------------

Show me the **Solution** ([Adding Opportunities to the Link Items Menu: Solution](#))

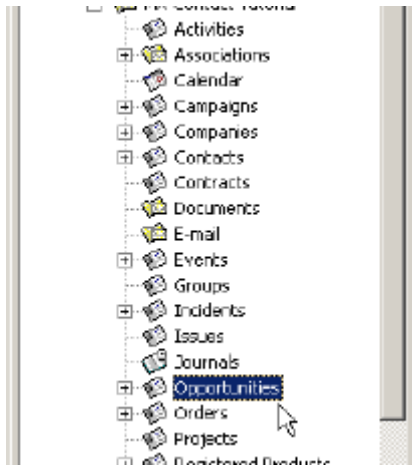
3.10 Adding Opportunities to the Link Items Menu: Solution

You want add opportunities to the Link Items Menu.

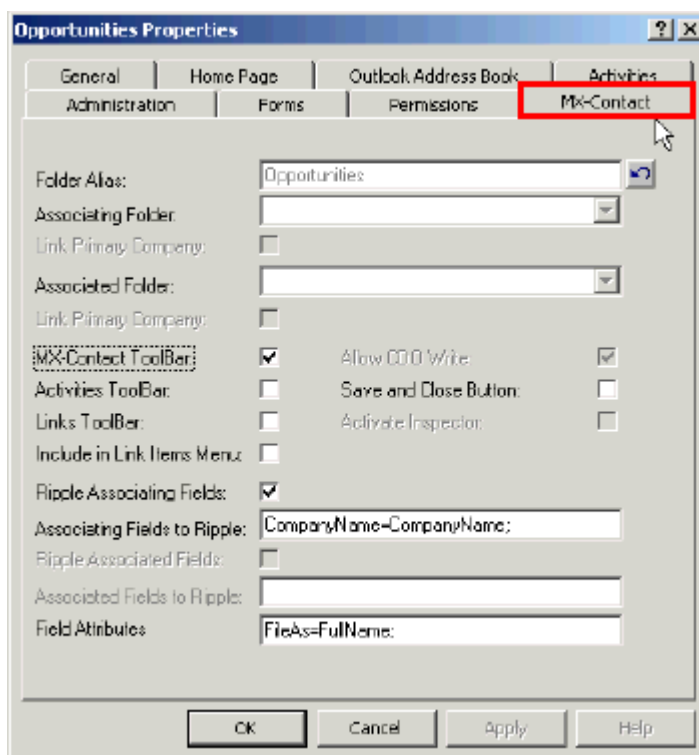
Link Items Menu:	Opportunities
------------------	---------------

Basic Steps:

1. Select the **Opportunities Folder** from the **MX-Contact Folder List**:



2. Right click on **Opportunities** and select **Properties**. Click on the **MX-Contact Tab**. The following screen will appear:



3. Tick the box for **Include in Link Items Menu** and then click on OK.
4. You will be prompted to restart Outlook. Only once you done this, will Opportunities appear on the Link Items Menu.

Take me back to the Exercise ([Adding Opportunities to the Link Items Menu: Exercise](#))

Take me to the next Exercise ([Linking an E-Mail to an Opportunity from Contacts: Exercise](#))

3.11 Linking an E-Mail to an Opportunity from Contacts: Exercise

You want to send Barney Anderson a follow up e-mail regarding the proposal that you sent a few days ago and link it to the opportunity "Upgrade Network – 10 Computers".

Send an E-mail to **Barney Anderson** from his Contact Form.

To:	barneya@premierfoods.com.usa (appears automatically)
Subject:	Follow up on Proposal
Memo:	Hi Barney Just a quick note to check that you received the proposal sent a few days ago. Please feel free to contact me if you have any queries. Kind Regards Susan Jones

Show me the **Solution** ([Linking an E-Mail to an Opportunity from Contacts: Solution](#))

3.12 Linking an E-Mail to an Opportunity from Contacts: Solution

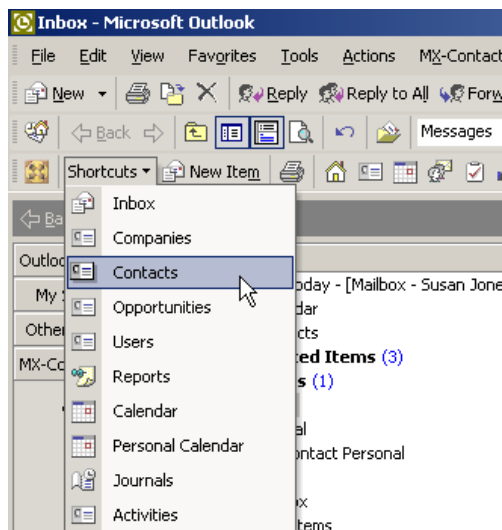
You want to send Barney Anderson a follow up e-mail regarding the proposal that you sent a few days ago and link it to the opportunity "Upgrade Network – 10 Computers".

Send an E-mail to **Barney Anderson** from his Contact Form.

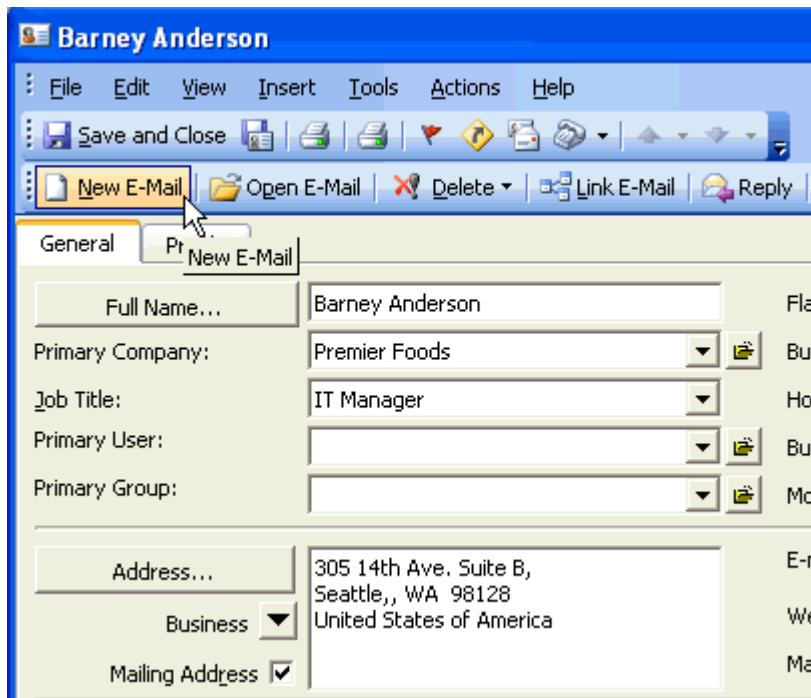
To:	barneya@premierfoods.com.usa (appears automatically)
Subject:	Follow up on Proposal
Memo:	<p>Hi Barney</p> <p>Just a quick note to check that you received the proposal sent a few days ago. Please feel free to contact me if you have any queries.</p> <p>Kind Regards Susan Jones</p>

Basic Steps:

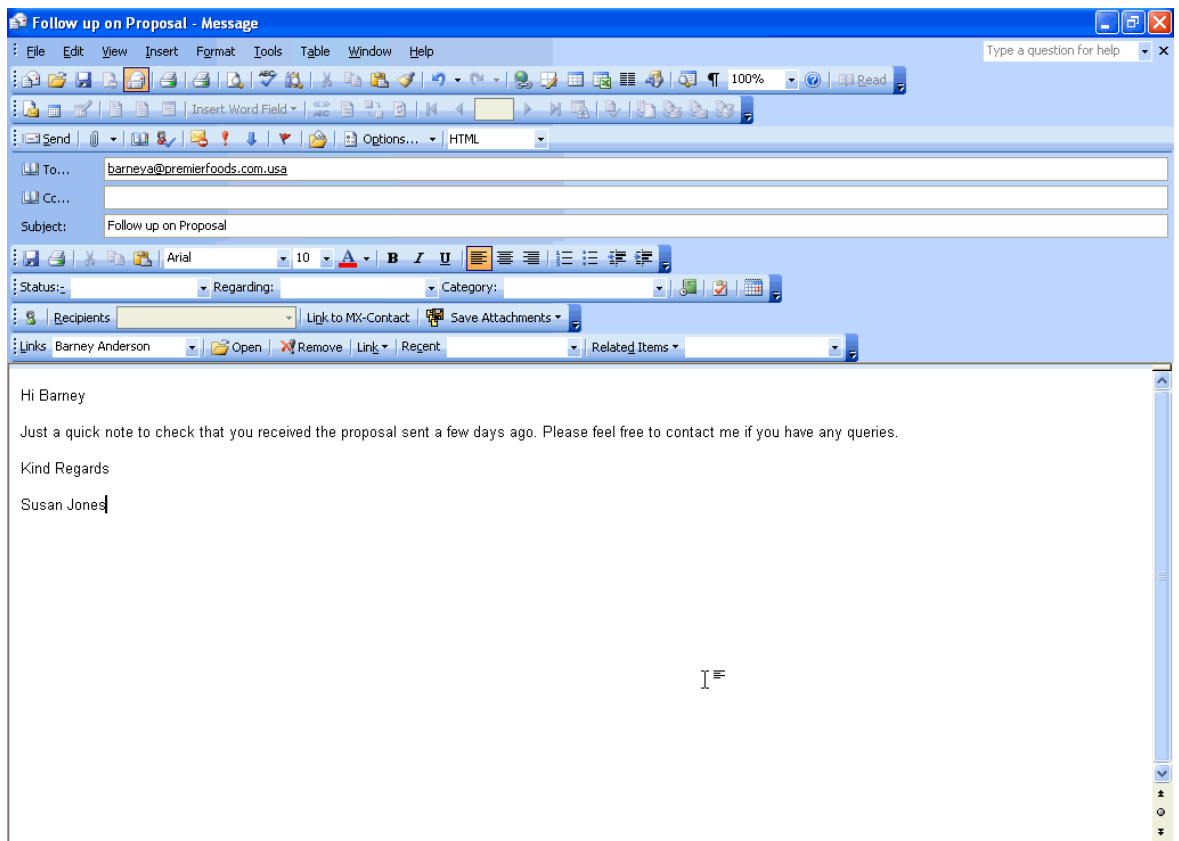
1. Select the **Contacts** Shortcut from the **Shortcuts Menu** on the **MX-Contact Toolbar**:



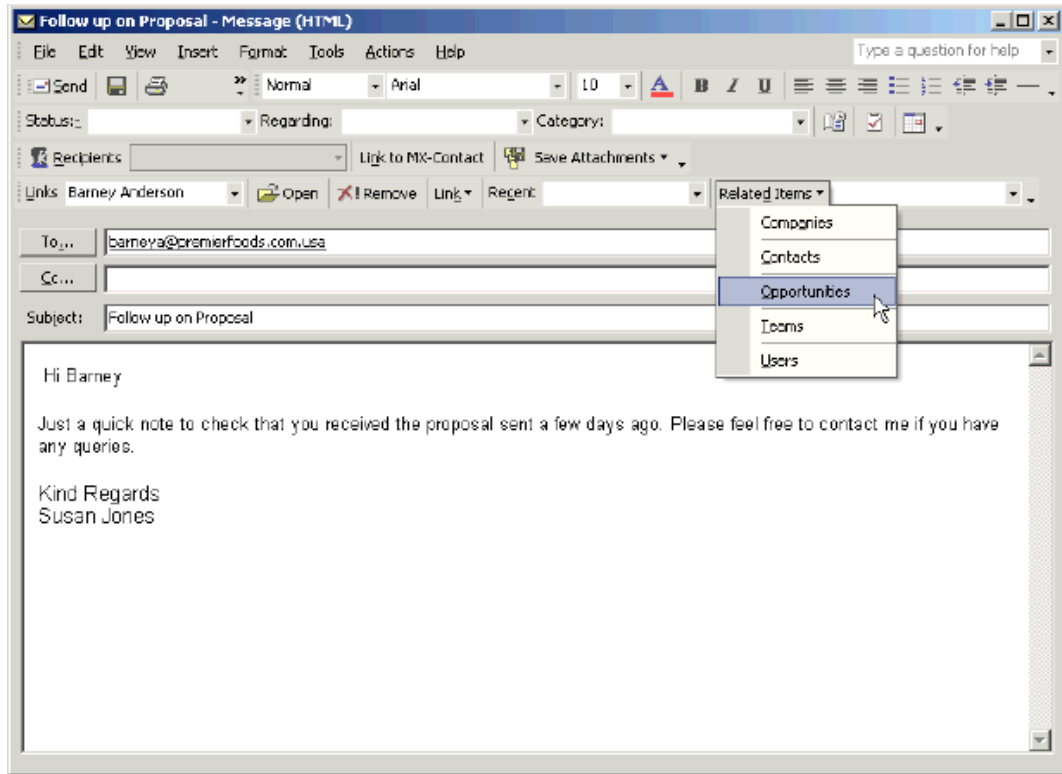
2. Open **Barney Anderson's** Contact Record.
3. Click on the **E-mail Tab**.
4. Click on **New E-Mail**:



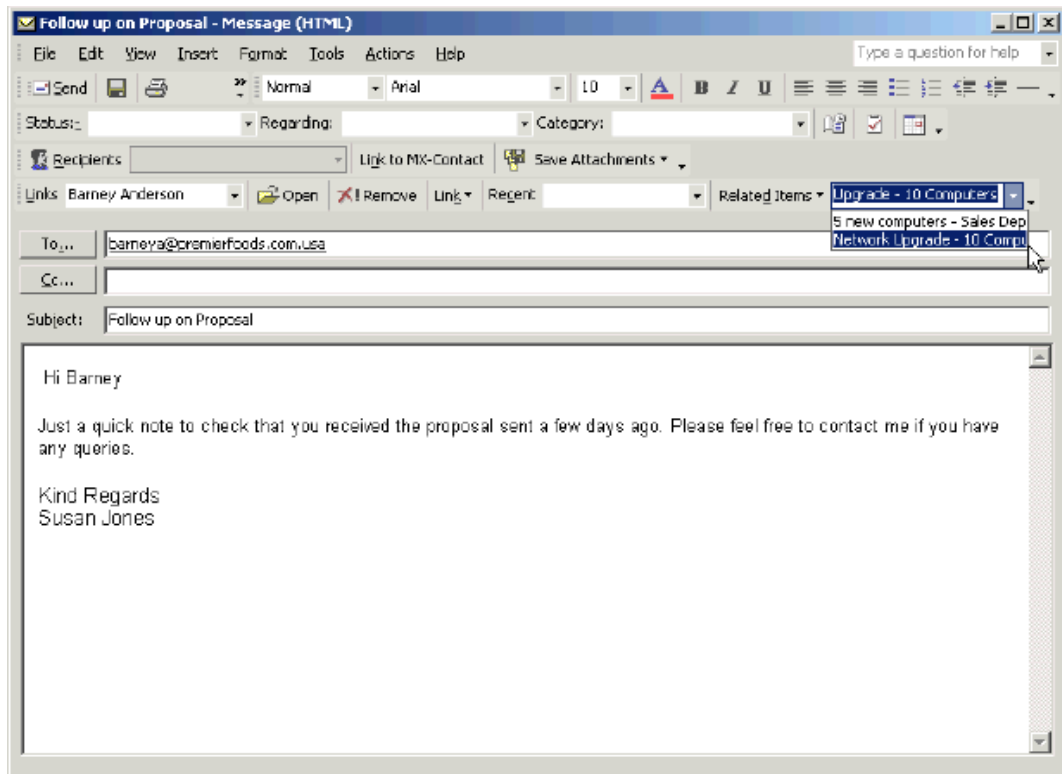
5. Enter the details shown above:



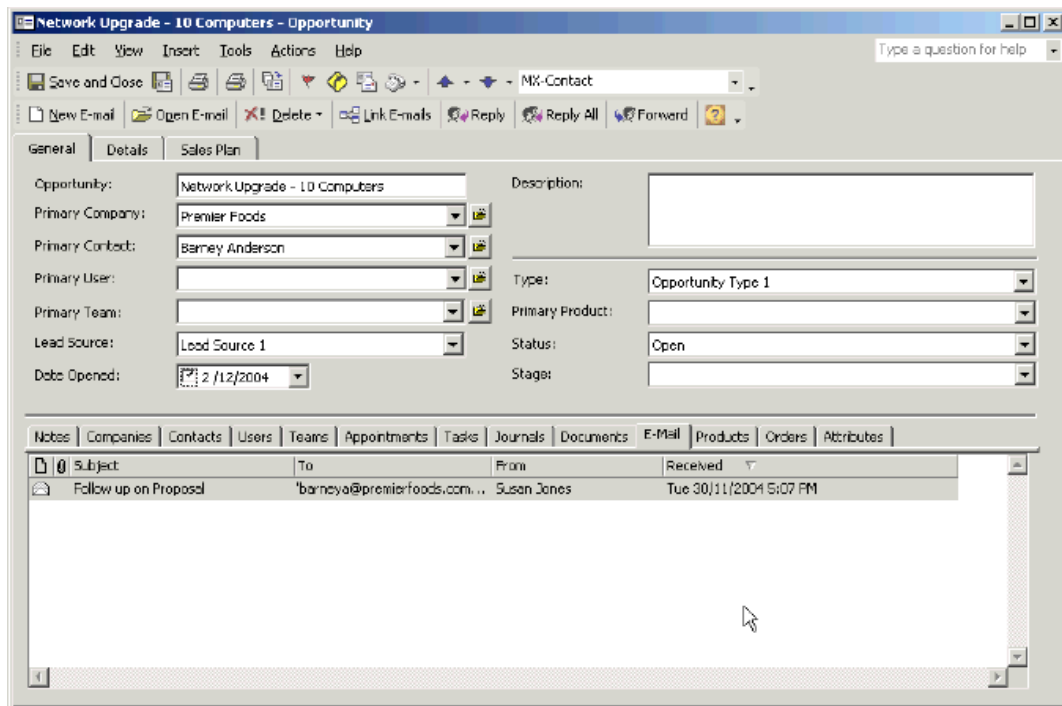
- To link this E-Mail to the opportunity “Upgrade Network – 10 Computers”, click on the drop down list for **Related Items** and select **Opportunities**.



- If there is only one opportunity linked to this contact person, that opportunity will automatically be inserted in the **Related Items** field. If you have more than one opportunity linked to this contact, a list will appear allowing you to select the opportunity that you wish to link this E-Mail to.



8. Click **Send** on the E-Mail
9. You should now see the e-mail in the **E-Mail Tab** for the Opportunity “Upgrade Network – 10 Computers”.



10. Click **Save and Close**.

Take me back to the Exercise ([Linking an E-Mail to an Opportunity from Contacts: Exercise](#))

Take me to the next Exercise ([Generating a Document from an Opportunity: Exercise](#))

3.13 Generating a Document from an Opportunity: Exercise

You have prepared a proposal for Barney and want to generate a Fax Cover Sheet for this proposal from the opportunity folder so that it links automatically to the relevant opportunity.

Create a Fax Cover sheet for Barney using the following defaults:

Templates Location:	Outlook/Exchange Folder
Templates Folder:	Templates
Template Name:	Contemporary Fax Contact
Document Name:	Barney Anderson Fax Cover.doc
Document Location:	Outlook/Exchange Folder
Document Folder:	Blank (disabled)
Insert as:	Attachment

Show me the **Solution** ([Generating a Document from an Opportunity: Solution](#))

3.14 Generating a Document from an Opportunity: Solution

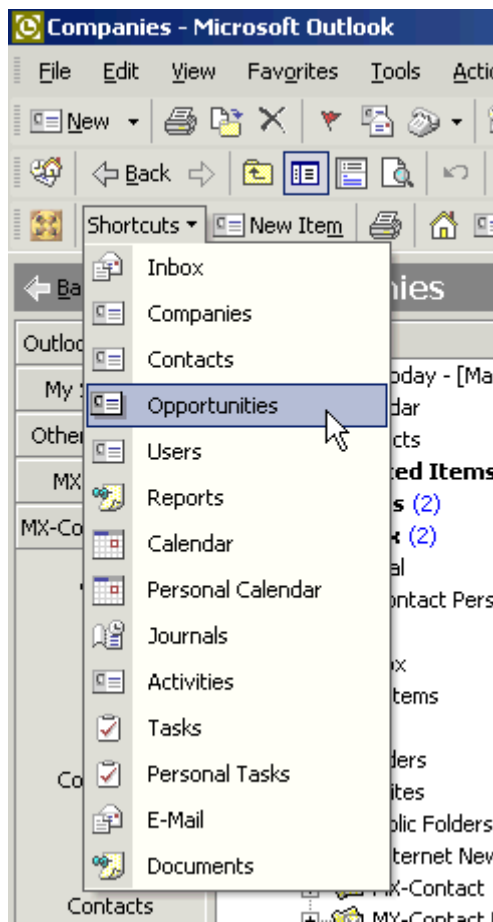
You have prepared a proposal for Barney and want to generate a Fax Cover Sheet for this proposal from the opportunity folder so that it links automatically to the relevant opportunity.

Create a Fax Cover sheet for Barney using the following defaults:

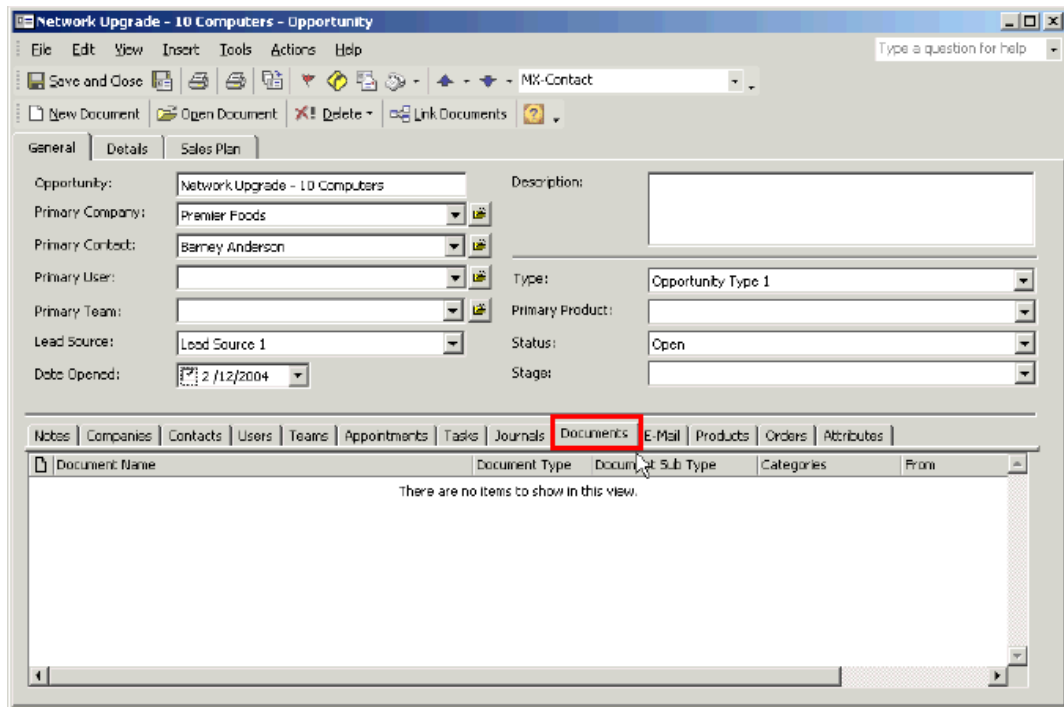
Templates Location:	Outlook/Exchange Folder
Templates Folder:	Templates
Template Name:	Contemporary Fax Contact
Document Name:	Barney Anderson Fax Cover.doc
Document Location:	Outlook/Exchange Folder
Document Folder:	Blank (disabled)
Insert as:	Attachment

Basic Steps:

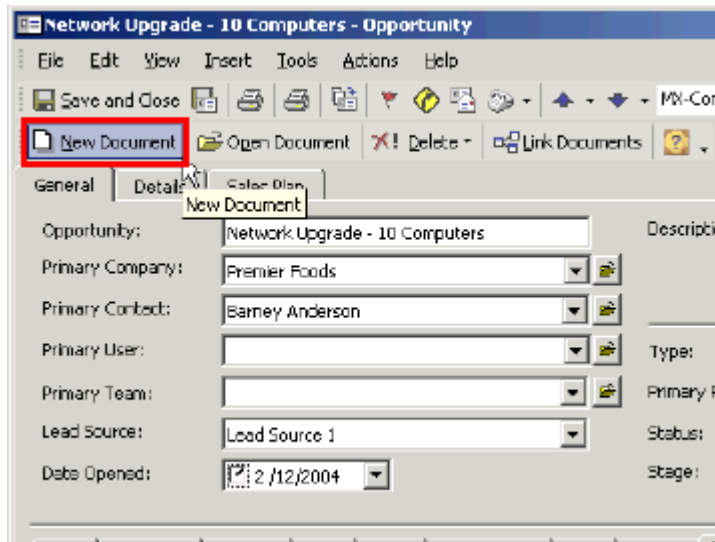
1. Select the **Opportunities** Shortcut from the **Shortcuts Menu** on the **MX-Contact Toolbar**:



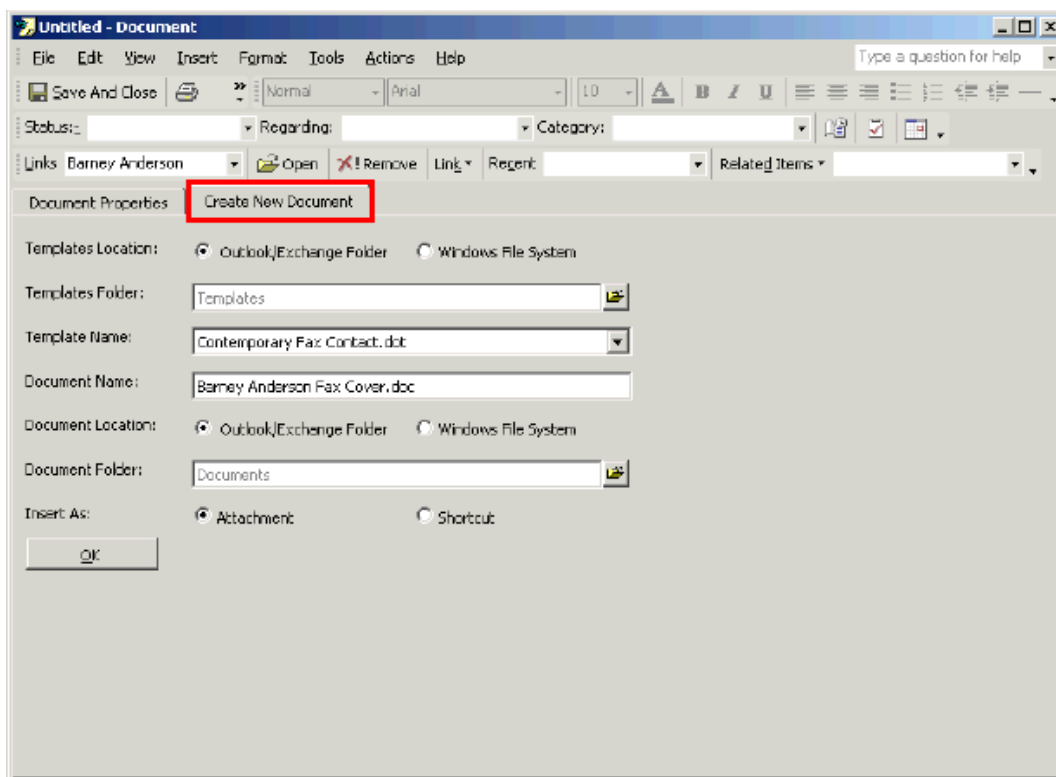
2. Open the opportunity “Upgrade Network – 10 Computers”..
3. Click on the **Documents Tab**.



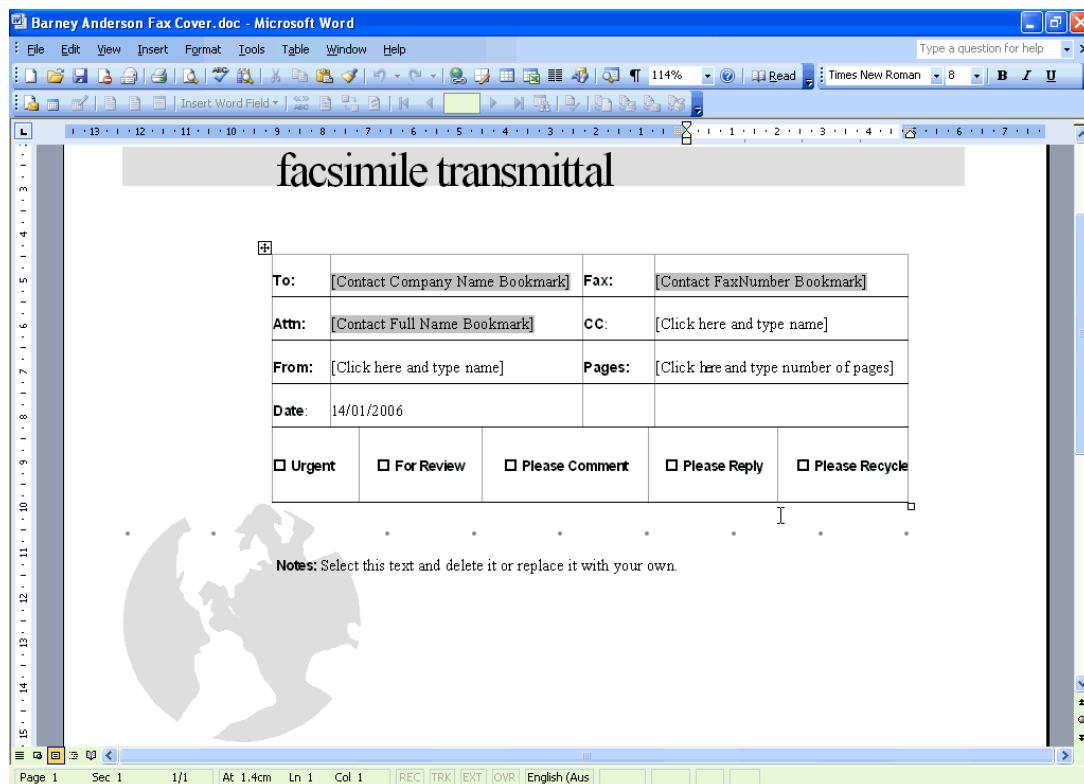
4. Click on **New Document**:



5. Click on the **Create New Document** Tab, and enter the details shown above:



6. Click **OK** on the **Document Form**. Microsoft Word should open with the specified template and populate the Fax Cover Sheet with the contact's details.



7. Click **File, Save** in Word and close the document.
8. Click **Save and Close** on the **Document Form**. You should see the document in the **Documents Tab** for the opportunity "Network Upgrade – 10 Computers".

Opportunity 1000002

File Edit View Insert Tools Actions Help

Save and Close New Document Open Document Delete Link Documents

General Details Generate Quote

Opportunity: Opportunity 1000002 Description: Network Upgrade - 10 Computers

Primary Company: Premier Foods

Primary Contact: Barney Anderson

Primary User:

Primary Team:

Lead Source: Lead Source 1

Date Opened: 14/01/2006

Type: Opportunity Type 1

Primary Product:

Status: Open

Stage: Create Order

Notes Companies Contacts Users Teams Appointments Tasks Journals Documents E-Mail Products Orders Attributes

MX-Contact

Document Name	Document Type	Document Sub Type	Categories	From	Received
Barney Anderson...				Jane Thompson	Sat 14/01/2006 1...

1 Items SQL View Version: 6.3.49

9. Click **Save and Close**.

Take me back to the Exercise ([Generating a Document from an Opportunity: Exercise](#))

Take me to the next Exercise ([Adding a Task to an Opportunity: Exercise](#))

3.15 Adding a Task to an Opportunity: Exercise

Create a Task from an opportunity to do a proposal for **Barney Anderson** of **Premier Foods**.

Complete the following information on the Task:

Opportunity:	Network Upgrade – 10 Computers
Subject:	Proposal to Barney
Due Date:	The following Thursday
Regarding:	Present/Review Proposal
Category:	Sales - Prospect

Show me the **Solution** ([Adding a Task to an Opportunity: Solution](#))

3.16 Adding a Task to an Opportunity: Solution

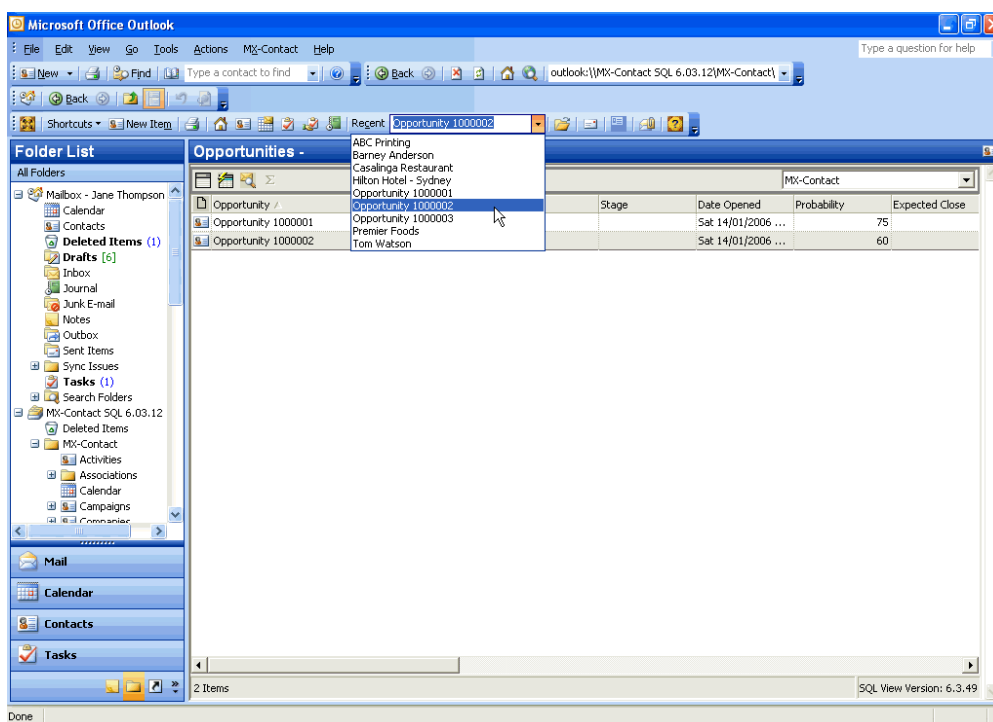
Create a Task from an opportunity to do a proposal for **Barney Anderson of Premier Foods**.

Complete the following information on the Task:

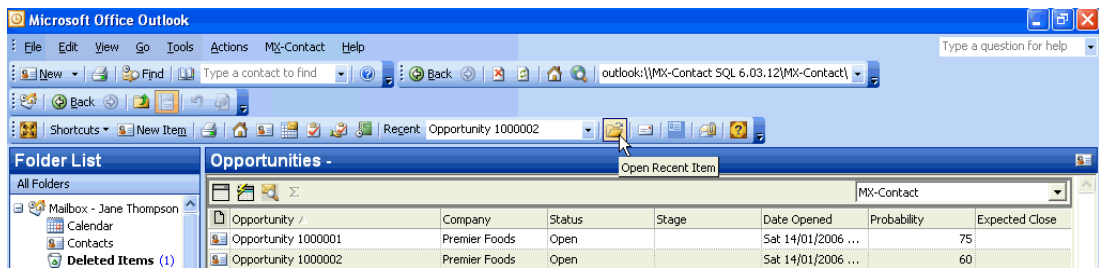
Opportunity:	Network Upgrade – 10 Computers
Subject:	Fax proposal to Barney
Due Date:	The following Thursday
Regarding:	Present/Review Proposal
Category:	Sales - Prospect

Basic Steps:

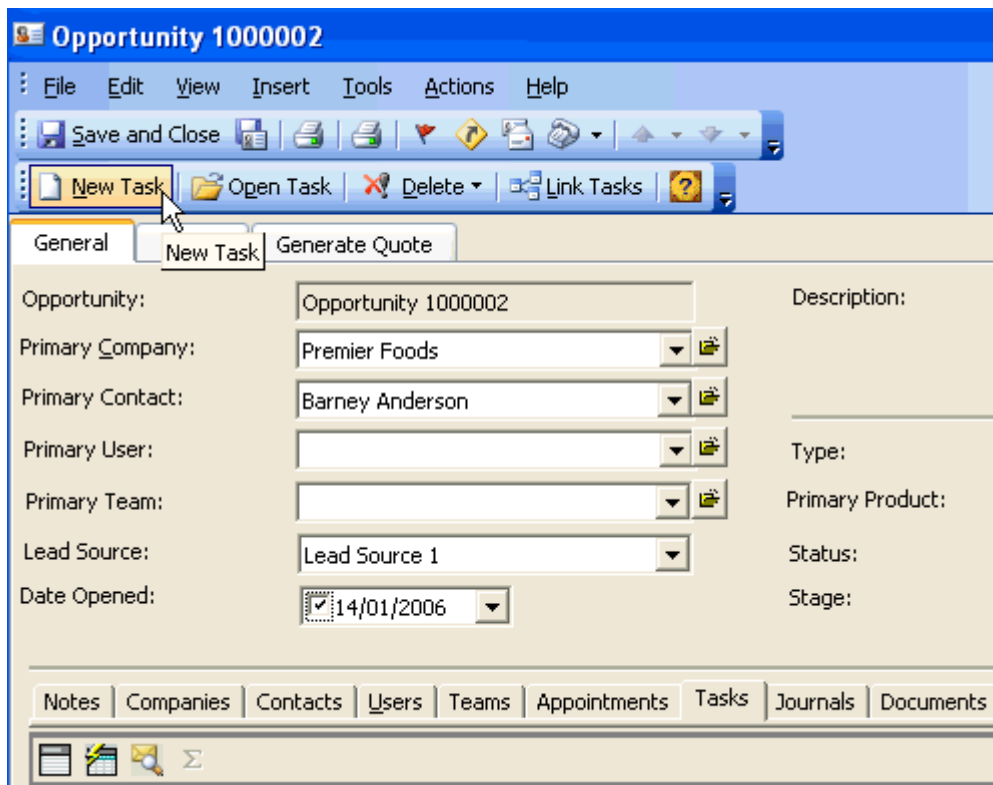
1. Open the opportunity “Opportunity 1000002” (try this from Recent Items). Click on the **Recent Items** drop down list and select “Upgrade Network – 10 Computers”.



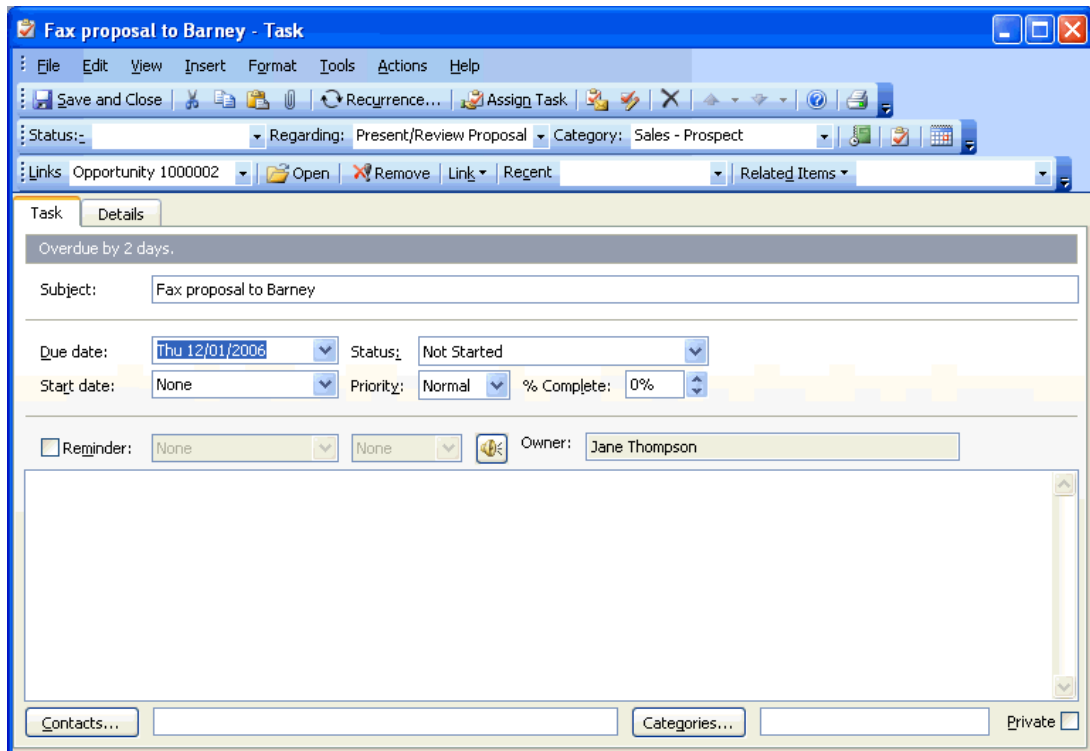
2. Click on the **Open Recent Item** button.



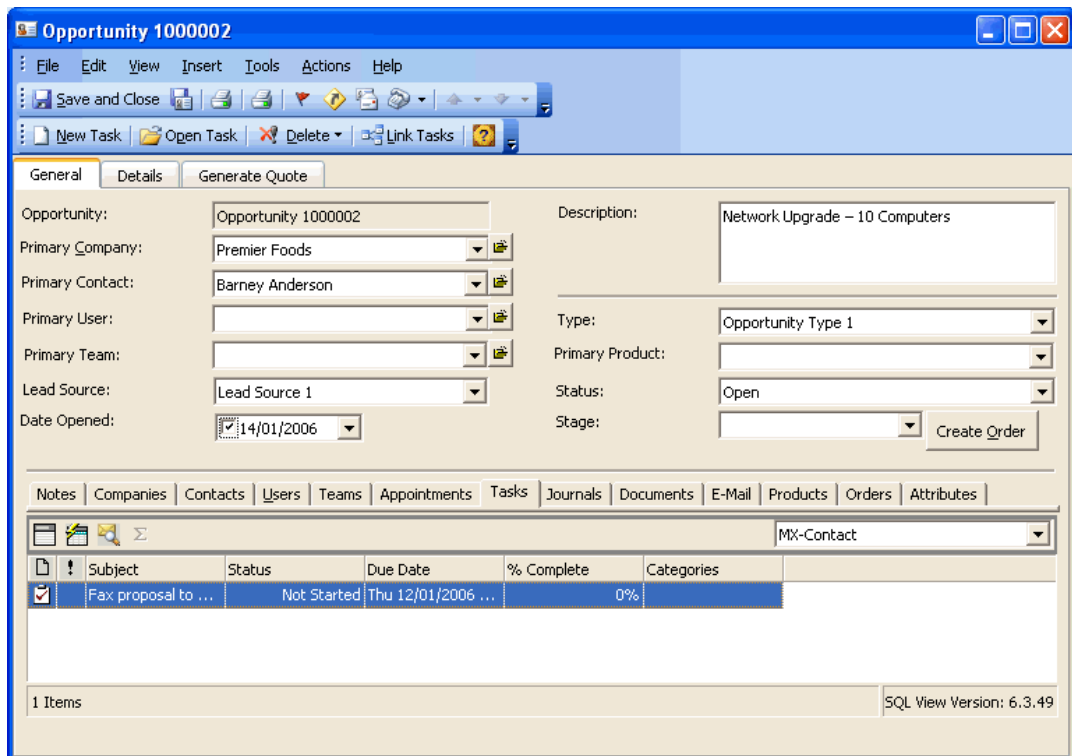
3. Once the Opportunity form has opened, click on the **Tasks Tab**.
4. Click on **New Task**.



5. Enter the Task Details:



6. Click **Save and Close** on the Task. You should see the task displayed in the **Tasks Tab** of the opportunity “Upgrade Network – 10 Computers”:



7. Click **Save and Close**.

Take me back to the Exercise ([Adding a Task to an Opportunity: Exercise](#))

Take me to the next Exercise ([Tutorial Exercises – Orders](#))

4 Tutorial Exercises – Orders

The Orders folder records the details of each product sold to a customer, either a company or an individual client (contact) purchaser. Multiple Line Items may be attached to an Order, which record details of each item that make up a main system or configuration.

In this section you will perform the following exercises:

- 1. Add an Order from Orders Folder**
[Adding an Order from the Orders Folder: Exercise](#)
- 2. Creating an Order from an Opportunity**
[Creating an Order from an Opportunity: Exercise](#)
- 3. Running an Order Report**
[Running an Orders Report: Exercise](#)
- 4. Running an Order Report – Single Order**
[Running an Orders Report – Single Order: Exercise](#)

Once you have done these exercises you are ready to learn about adding Projects to companies. ([Tutorial Exercises – Projects](#))

4.1 Adding an Order from the Orders Folder: Exercise

Premier Foods purchases a HP Pavilion Notebook from your Company.

Record the following details.

Description:	HP Pavilion Notebook
Reference:	PRE12345
Order Date:	Today's Date
Shipped Date:	Today's Date
Invoice No:	INV12345
Invoice Date:	Today's Date
Ship Via:	Fedex
Freight	\$65.00

Line Items:

Product Code:	Zv5022AP
Description:	HP Pavilion Notebook
Quantity:	1
Unit Price:	\$2,025.00

Show me the **Solution** ([Adding an Order from the Orders Folder: Solution](#))

4.2 Adding an Order from the Orders Folder: Solution

Premier Foods purchases a HP Pavilion Notebook from your Company.

Record the following details.

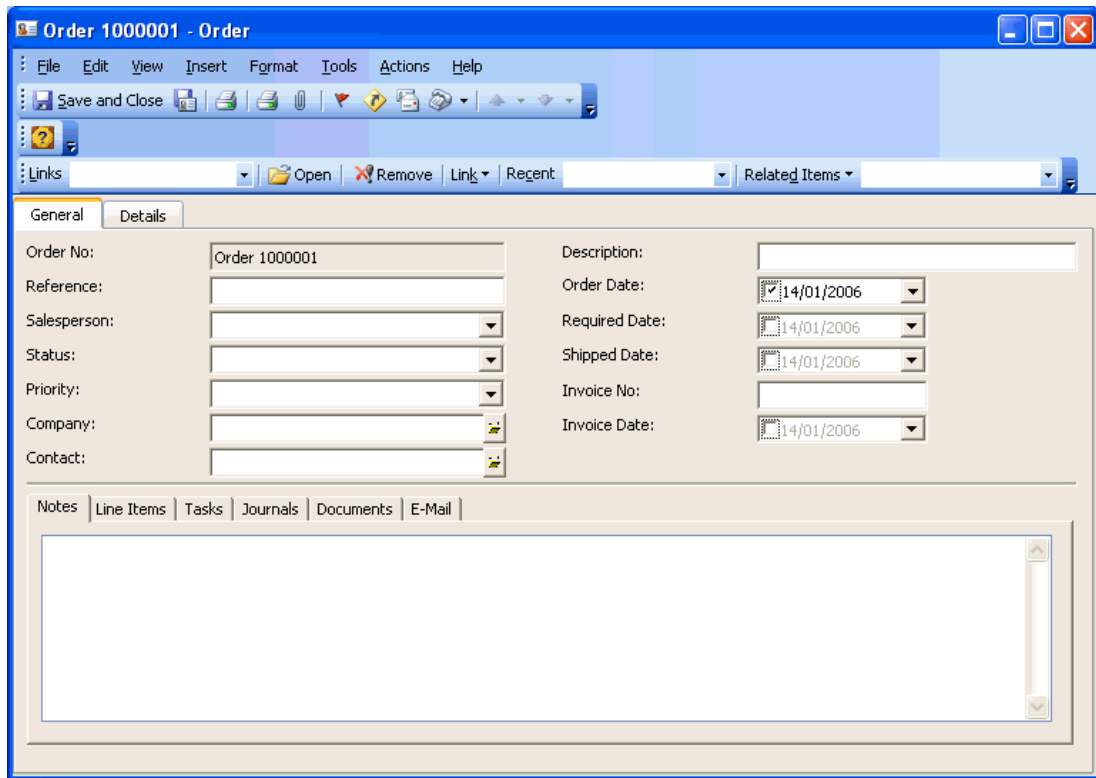
Description:	HP Pavilion Notebook
Reference:	PRE12345
Order Date:	Today's Date
Shipped Date:	Today's Date
Invoice No:	INV12345
Invoice Date:	Today's Date
Ship Via:	Fedex
Freight	\$65.00

Line Items:

Product Code:	Zv5022AP
Description:	HP Pavilion Notebook
Quantity:	1
Unit Price:	\$2,025.00

Basic Steps:

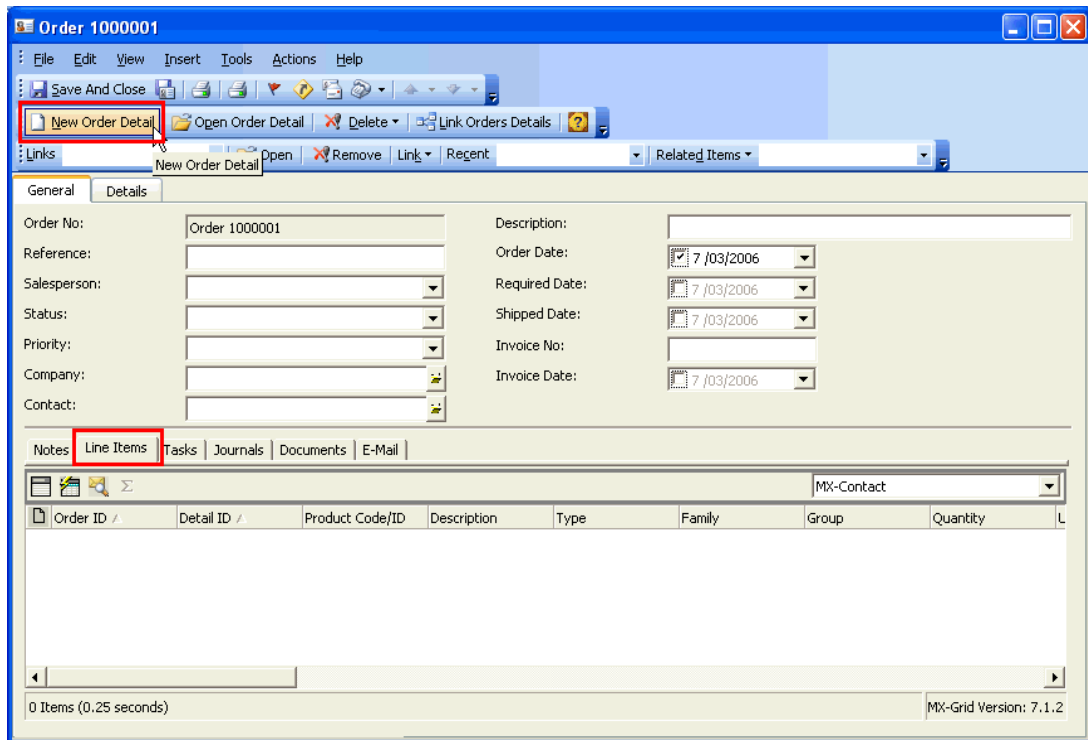
1. Select the **Orders Folder** from the **MX-Contact Folder List**.
2. Click on the **New Item button**:
3. A blank **Orders form** will appear:



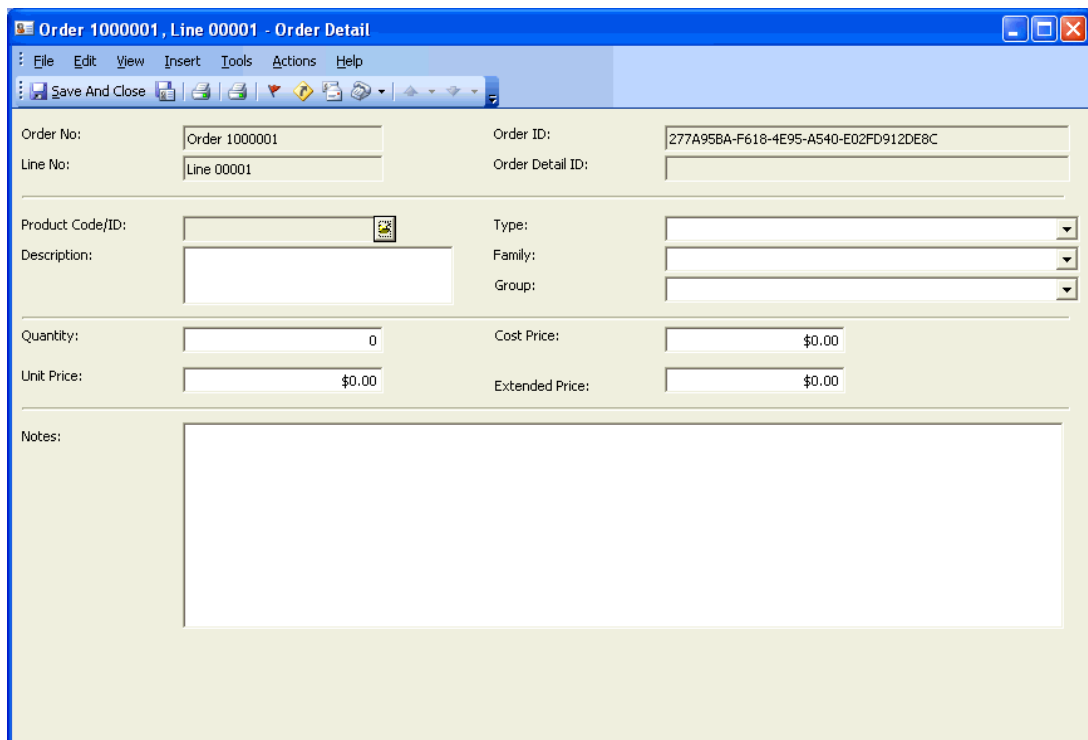
4. Enter the following details,:

Description:	HP Pavilion Notebook
Reference:	PRE12345
Order Date:	Today's Date
Shipped Date:	Today's Date
Invoice No:	INV12345
Invoice Date:	Today's Date
Ship Via:	Fedex
Freight	\$65.00

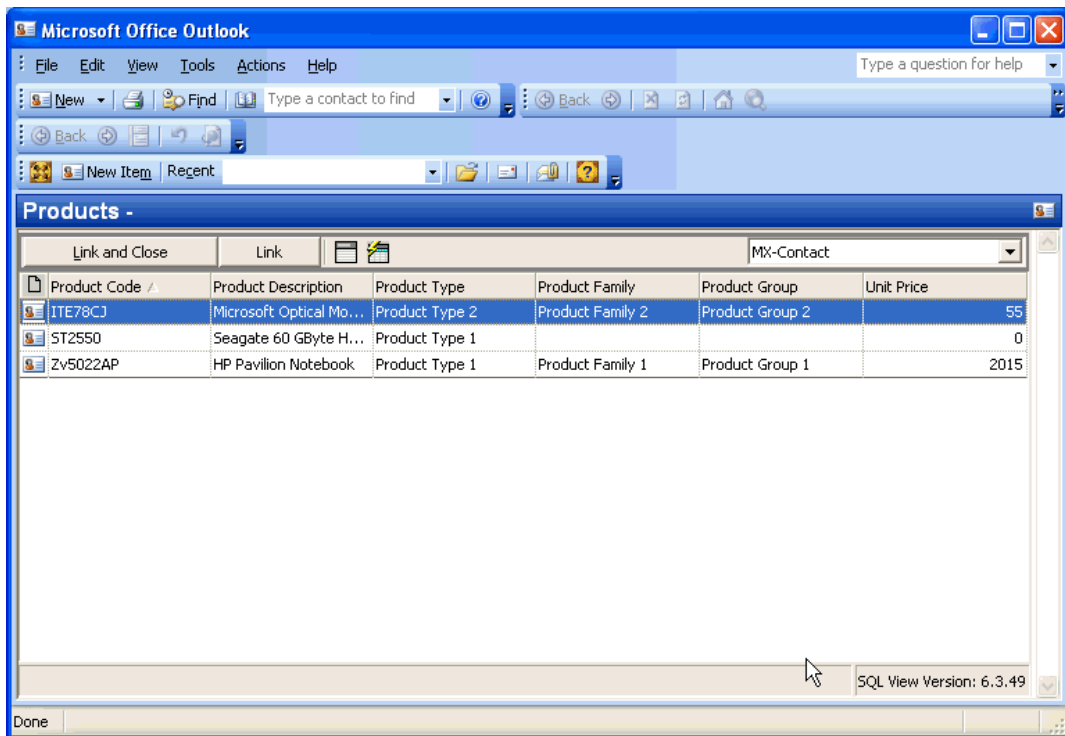
5. To add products to this order, click on the **Line Items** tab. Select the **New Order Detail** button.



6. The following screen will appear:



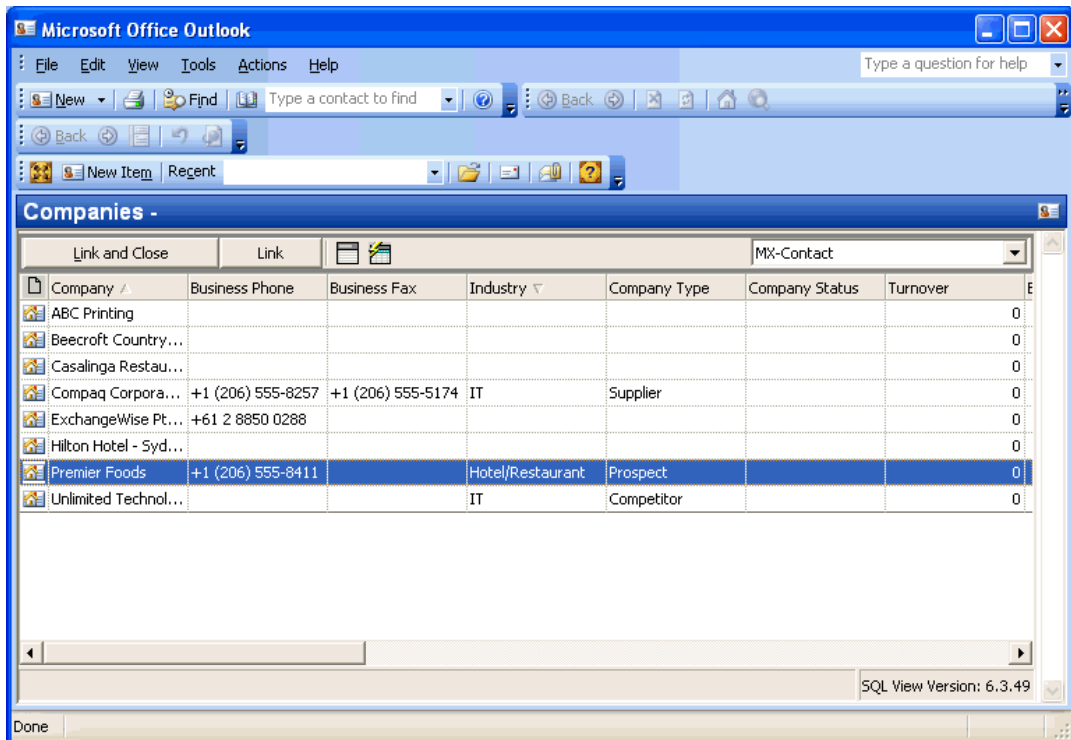
7. Click on the **Open Folder** button attached to the **Product Code** field. The **Product Register** will appear.



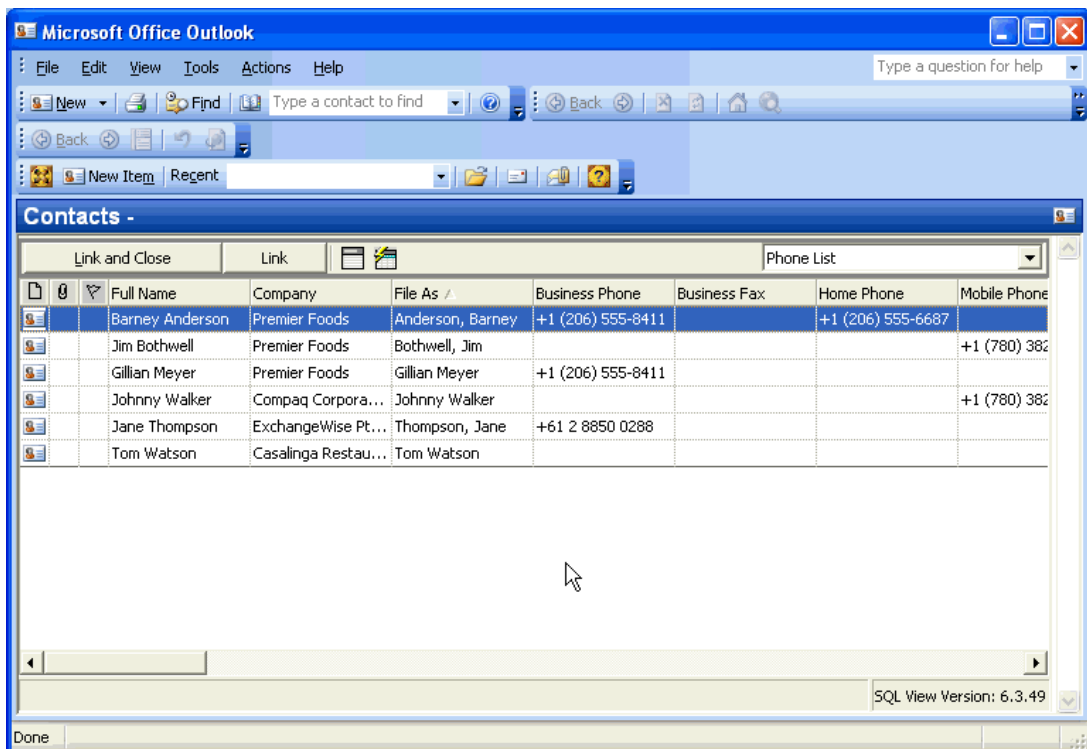
8. Select the relevant Product and then click on the **Link and Close** button.
9. Enter all the remaining details.

Ext. Price:	\$2,025.00
Quantity:	1

10. Click on **Save and Close**. Repeat this process until all the required products have been added.
11. If you wish to link a company to this order, click on the **Open Folder** button attached to the **Company** field. A list of companies will appear. Highlight the company and click on **Link and Close**.



- If you wish to link a contact to this order, click on the **Open Folder** button attached to the **Contact** field. A list of contacts will appear. Highlight the contact and click on **Link and Close**.



13. Click **Save and Close**. You should see this Order displayed on the **Orders List**.

Take me back to the Exercise ([Adding an Order from the Orders Folder: Exercise](#))

Take me to the next Exercise ([Creating an Order from an Opportunity: Exercise](#))

4.3 Creating an Order from an Opportunity: Exercise

There is an open opportunity with Premier Foods for an upgrade of their server. This has now become an order. Use the opportunity to create an order.

Complete the following information:

Company:	Premier Foods
Description:	5 new computers - Sales Department
Order Date:	14/07/2005

Line Items:

Product Code:	Zv5022AP
Description:	HP Pavilion Notebook
Quantity:	5
Selling Price:	\$2,030.00

Show me the **Solution** ([Creating an Order from an Opportunity: Solution](#))

4.4 Creating an Order from an Opportunity: Solution

There is an open opportunity with Premier Foods for an upgrade of their server. This has now become an order. Use the opportunity to create an order.

Complete the following information:

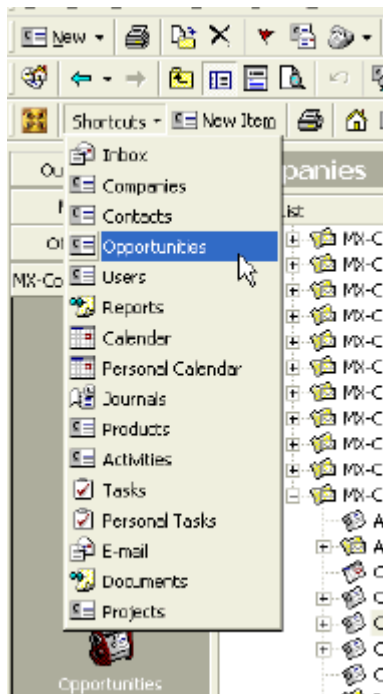
Company:	Premier Foods
Description:	5 new computers - Sales Department
Order Date:	14/07/2005

Line Items:

Product Code:	Zv5022AP
Description:	HP Pavilion Notebook
Quantity:	5
Selling Price:	\$2,030.00

Basic Steps:

1. Select **Opportunities folder** from the **MX-Contact Shortcut Menu** and then click on the “5 New Computers for Sales Department” opportunity for Premier Foods to open the **Opportunity record**.



2. The following screen will appear..

A screenshot of the '5 new computers - Sales Department - Opportunity' form in the MX-Contact software. The form has a menu bar (File, Edit, View, Insert, Format, Tools, Actions, Help) and a toolbar. Below the toolbar are tabs for 'General', 'Details', 'Sales Plan', and 'Generate Quote'. The 'General' tab is active, showing fields for Opportunity, Primary Company, Primary Contact, Primary User, Primary Team, Lead Source, Date Opened, Description, Type, Primary Product, Status, and Stage. The 'Create Order' button is highlighted with a red box. Below the form is a 'Notes' section with a list of tabs: Companies, Contacts, Users, Teams, Appointments, Tasks, Journals, Documents, E-Mail, Products, Orders, Attributes.

Click on the **Create Order** button. An **Order Form** will open transferring all the information found in the Opportunity to the **Order** screen.

3. **Opportunity products** will carry across as **Line Items** to the **Order form**. Edit where necessary by double clicking on the Line Item that you wish to edit.
4. Click **Save and Close** on the **Order Form**.

Take me back to the Exercise ([Creating an Order from an Opportunity: Exercise](#))

Take me to the next Exercise ([Running an Orders Report: Exercise](#))

4.5 Running an Orders Report: Exercise

Run an Orders Report with Line Items (Landscape).

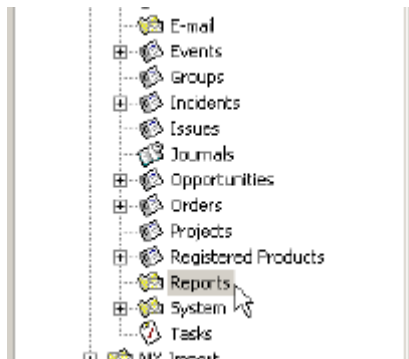
Show me the **Solution** ([Running an Orders Report: Solution](#))

4.6 Running an Orders Report: Solution

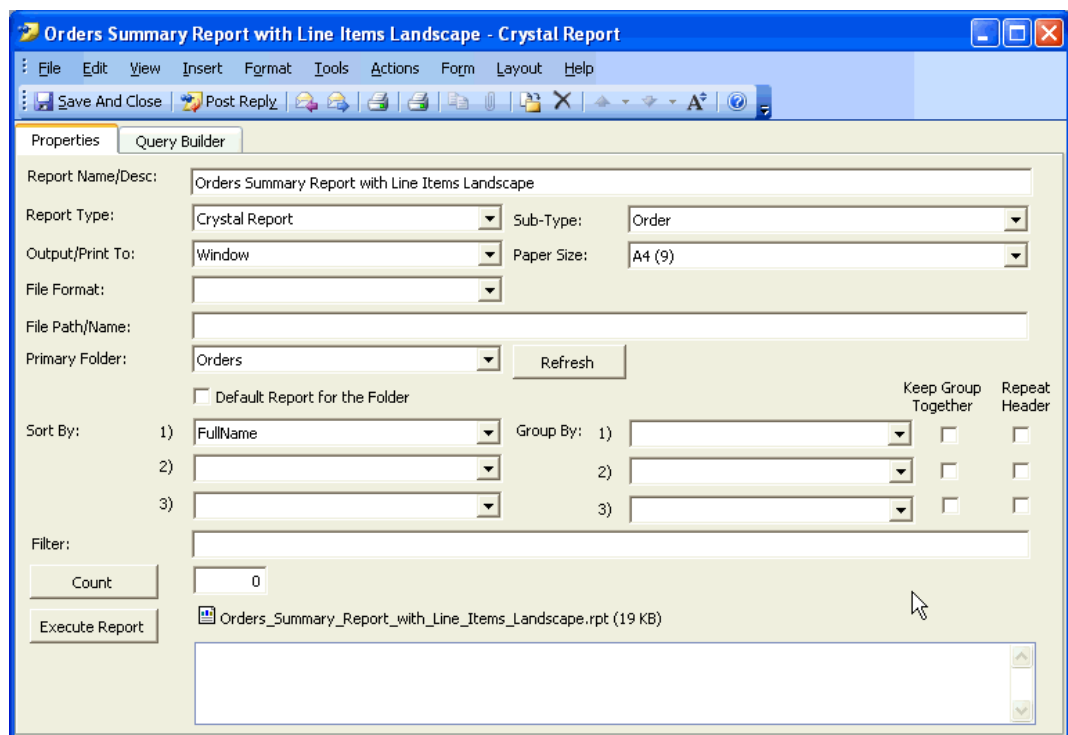
Run an Orders Report with Line Items (Landscape).

Basic Steps:

1. Click on the **Reports Folder** in the **MX-Contact Folder List**.



2. Select the **Order Summary Report with Line Items Landscape**.



3. Click on **Execute Report**. The report will be displayed as follows:

100% | 1 of 1 | powered by crystal

Orders Report with Line Items

Sorted By: FullName

Company Contact	Salesperson	Status Priority	Required Date Date Shipped	Date Invo Invoice N
Premier Foods Barney Anderson		1 - Ordered		
		Product Type	Quantity	Unit Price
		ProductType 1		\$2,015.00
		ProductType 1		\$2,015.00

- Close the Report. Select **No** if you are prompted to 'Save Changes'.

Take me back to the Exercise ([Running an Orders Report: Exercise](#))

Take me to the next Exercise ([Running an Orders Report – Single Order: Exercise](#))

4.7 Running an Orders Report – Single Order: Exercise

Run an Orders Report with Line Items (Landscape) for the Premier Foods Order – “5 New Computers – Sales Department”.

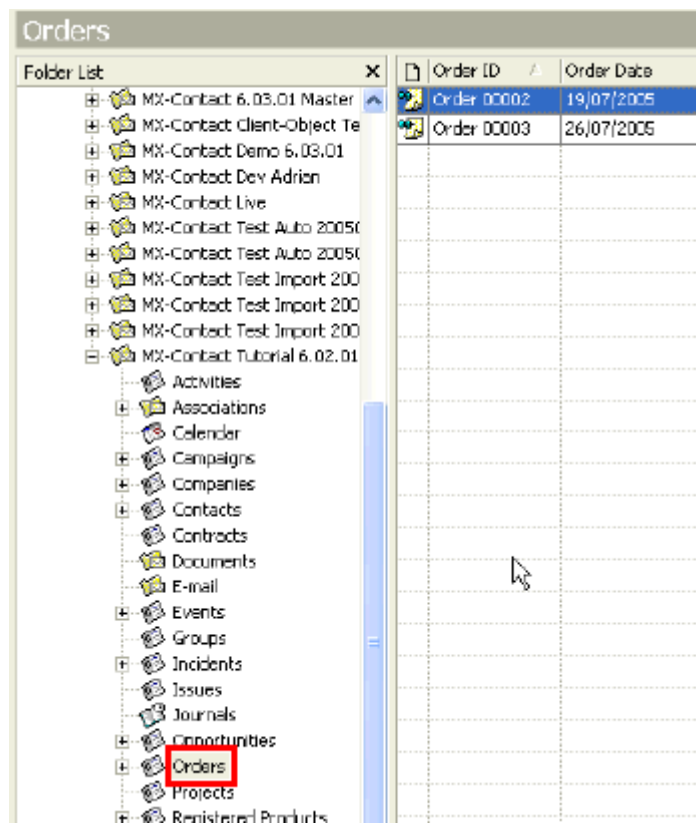
Show me the **Solution** ([Running an Orders Report – Single Order: Solution](#))

4.8 Running an Orders Report – Single Order: Solution

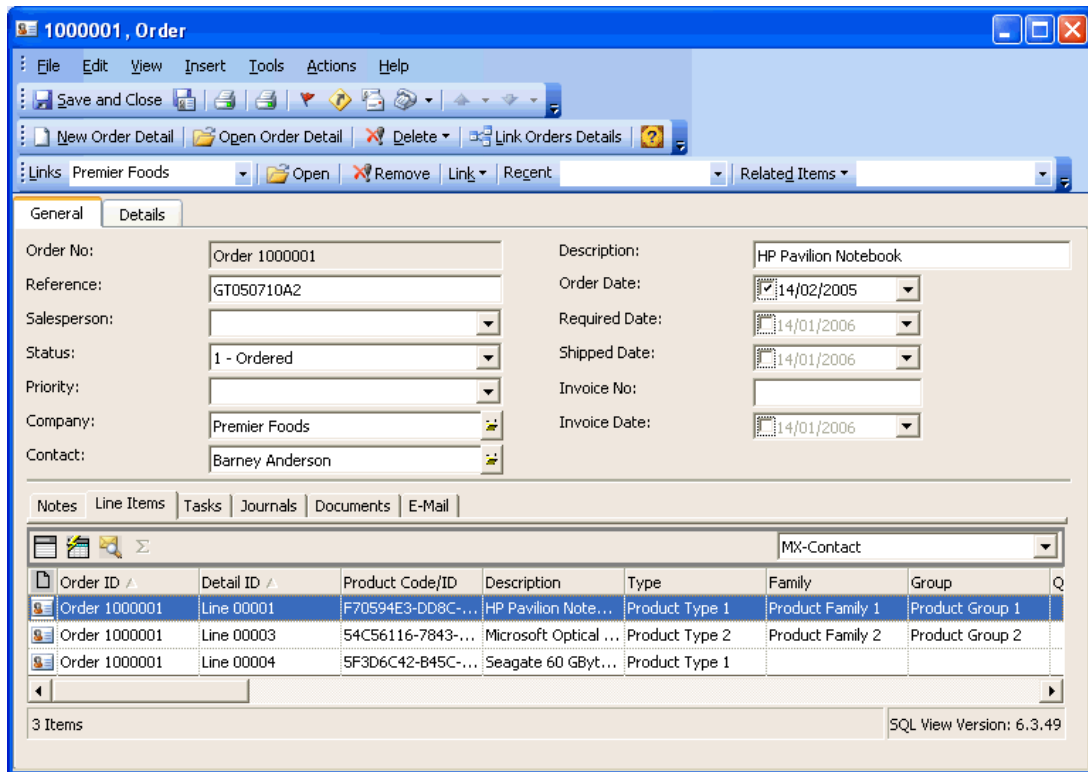
Run an Orders Report with Line Items (Landscape) for the Premier Foods Order – “5 New Computers – Sales Department”.

Basic Steps:

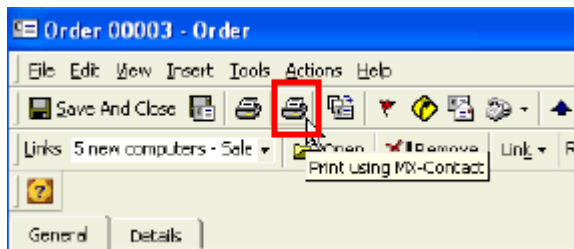
1. Click on the **Orders Folder** in the **MX-Contact Folder List**.



2. Select the Order for Premier Foods.



3. Click on the **Print Using MX-Contact** button.



4. The report will be sent directly to the printer. It will be printed in the following format:

100% | 1 of 1 | powered by crystal

Orders Report with Line Items

(Orders: noOrderID) = '6AD9463E-D1C6-48FD-9AA5-98A358018373', Sorted By: FullName

Company Contact	Salesperson	Status Priority	Required Date Date Shipped	Date Invoiced
Premier Foods Barney Anderson	Text Object	1-Ordered		

Product Type	Quantity	Unit Price
ProductType 1		\$2,015.00
ProductType 2		\$55.00
ProductType 1		

Take me back to the Exercise ([Running an Orders Report – Single Order: Exercise](#))

Take me to the next Exercise ([Tutorial Exercises – Projects](#))

5 Tutorial Exercises – Projects

The Projects folder records the details of each project sold to a customer, either a company or an individual client (contact) purchaser.

In this section you will perform the following exercises:

1. Adding a Project from Projects Folder

[Adding a Project: Exercise](#)

2. Add a Company from a Project

[Adding a Company from a Project: Exercise](#)

3. Edit a Company to Project Association

[Editing a Company to Project Association: Exercise](#)

4. Attaching a Document to a Project

[Attaching a Document to a Project: Exercise](#)

5. Adding a Task to a Project

[Adding a Task to a Project: Exercise](#)

Once you have done these exercises you are ready to learn about creating Sales Plans. ([Tutorial Exercises – Sales Plans](#))

5.1 Adding a Project: Exercise

Complete the following information on the **General** tab:

Project:	Upgrading of Computer Hardware and Infrastructure
Date Opened:	Today's Date
Company:	Premier Foods
Status:	Out for Bid

Complete the following information on the **Details** tab:

Probability:	75%
Expected Value:	\$380,000
Quote Reference:	20050702RT12

Show me the **Solution** ([Adding a Project: Solution](#))

5.2 Adding a Project: Solution

Complete the following information on the **General** tab:

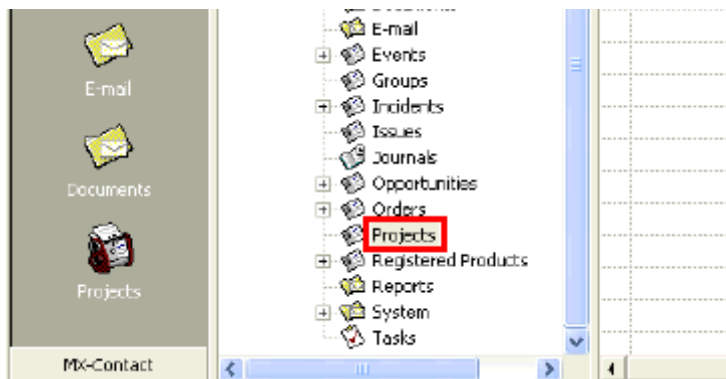
Project:	Upgrading of Computer Hardware and Infrastructure
Date Opened:	Today's Date
Company:	Premier Foods
Status:	Out for Bid

Complete the following information on the **Details** tab:

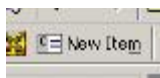
Probability:	75%
Expected Value:	\$380,000
Quote Reference:	20050702RT12

Basic Steps:

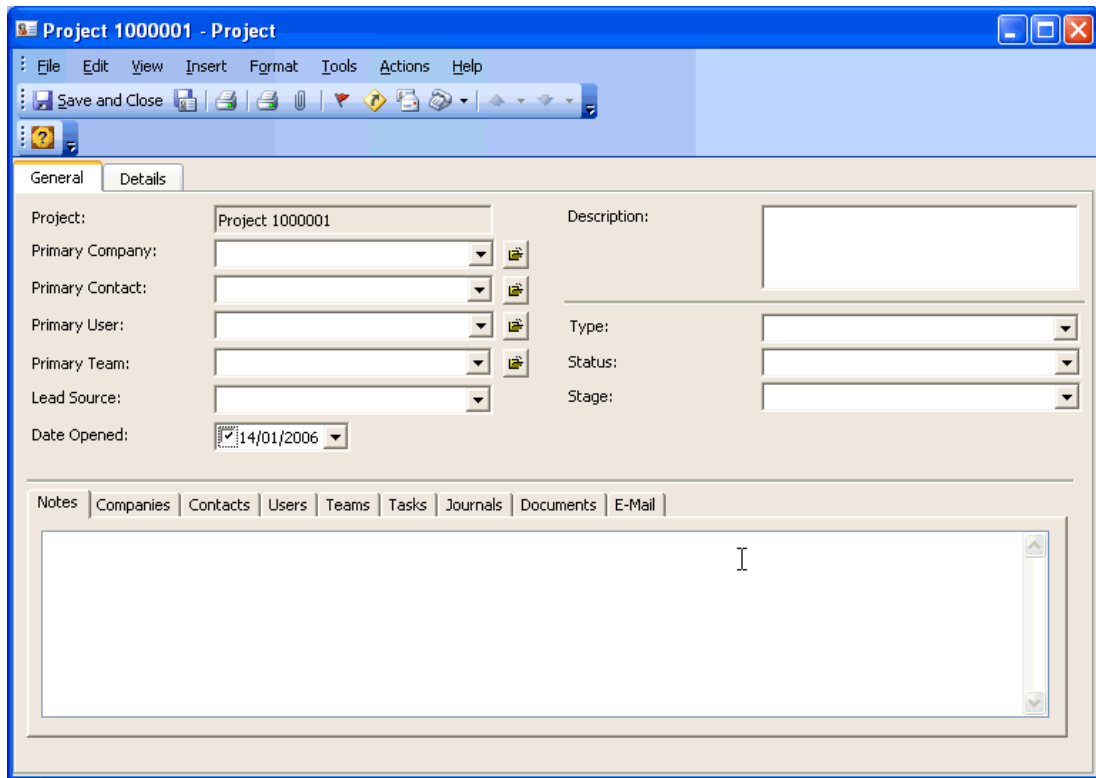
1. Select the **Projects** folder from the **Outlook Folder List**:



2. Click on the **New Item (Project)** button the **MX-Contact Toolbar**.



3. A blank **Project** Form will open:

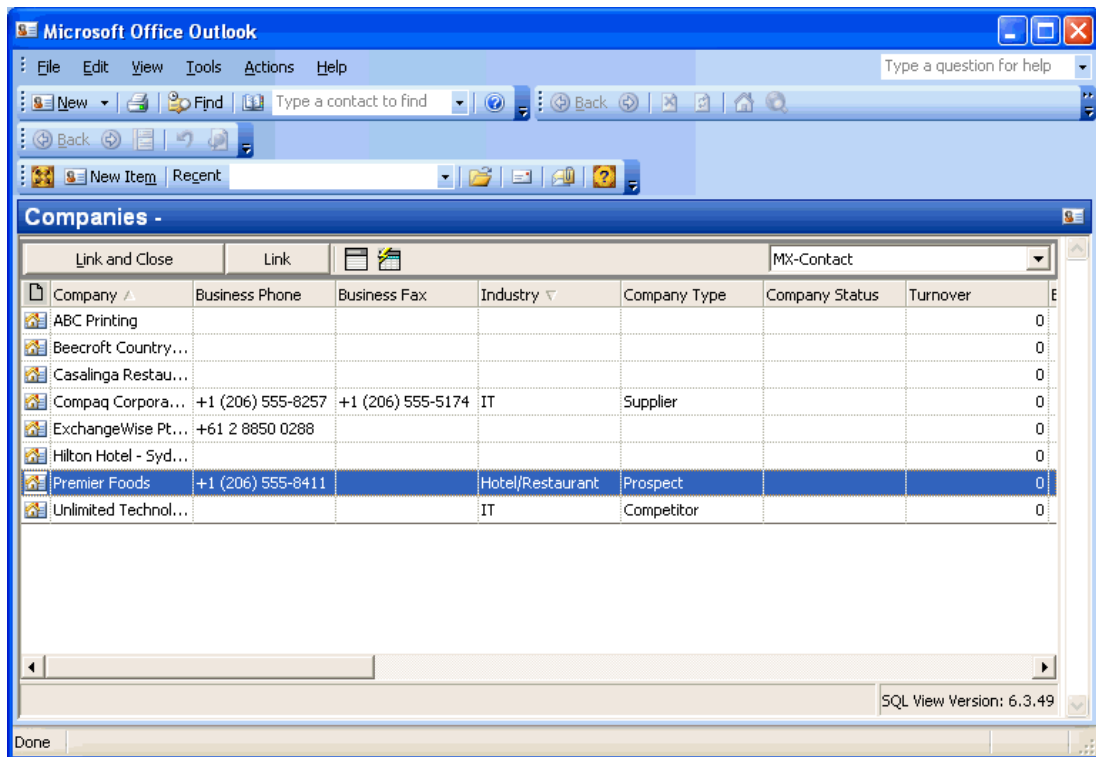


4. In the **New Project form**, add the details for the Project.

Complete the following information on the General Tab:

Description:	Upgrading of Computer Hardware and Infrastructure
Date Opened:	Today's Date
Company:	Premier Foods
Status:	Out for Bid

5. Click on the **Open Folder button** attached to the **Company field** in order to link Premier Foods to this project. When the **Link Companies list** appears, highlight Premier Foods and click on **Save and Close**.



6. Enter the details for the **Details Tab**:

Probability:	75%
Expected Value:	\$380,000
Quote Ref:	20050702RT12

7. Click **Save and Close**.

Take me to the next **Exercise** ([Adding a Company from a Project: Exercise](#))

5.3 Adding a Company from a Project: Exercise

Adding a Company from a Project:

Project Name:	Upgrading of Computer Hardware and Infrastructure
----------------------	--

Company:	Technology Integrators
Address:	Suite 31 Westmont Office Park, 231 Newman Road, Kirkland, WA 98321, USA
Phone:	(206) 876-8976

Show me the **Solution** ([Adding a Company from a Project: Solution](#))

5.4 Adding a Company from a Project: Solution

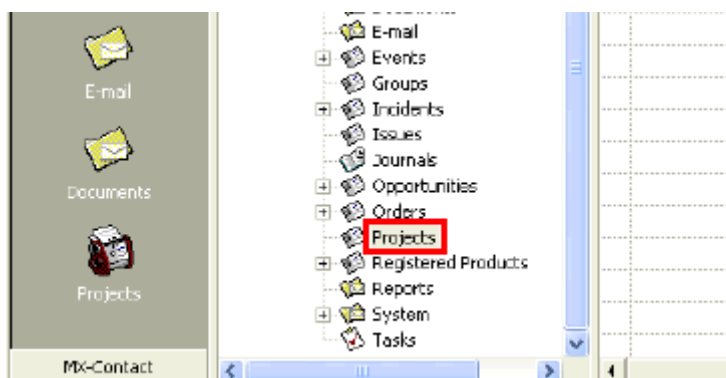
Adding a Company from a Project:

Project Name:	Upgrading of Computer Hardware and Infrastructure
----------------------	--

Company:	Technology Integrators
Address:	Suite 31 Westmont Office Park, 231 Newman Road, Kirkland, WA 98321, USA
Phone:	(206) 876-8976

Basic Steps:

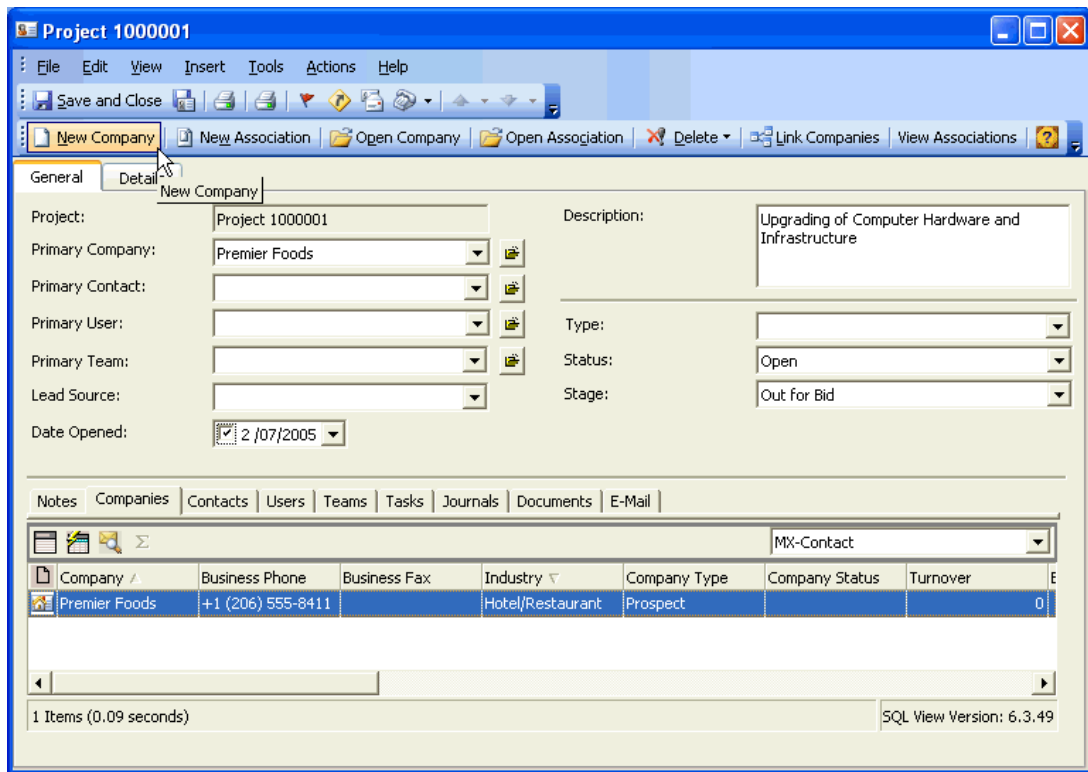
1. Select the **Projects** folder from the **Outlook Folder List**:



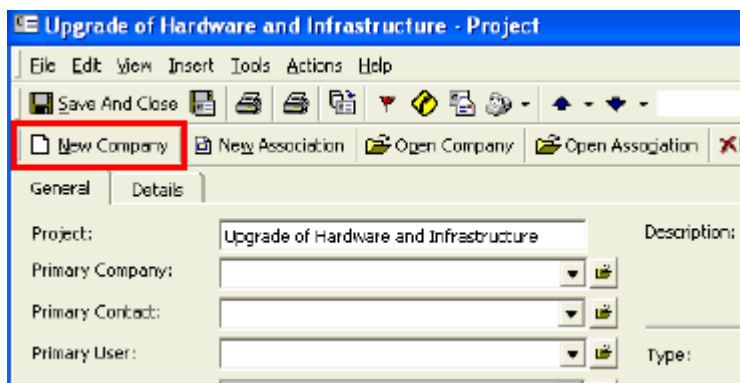
2. Open the following Project:

Project:	Project 1000001
-----------------	------------------------

3. Click on the **Companies Tab**.



4. Click on the **New Company** button.



5. A **New Company** screen will appear. Add the following details:

Company:	Technology Integrators
Address:	Suite 31 Westmont Office Park, 231 Newman Road, Kirkland, WA 98321, USA
Phone:	(206) 876-8976

Technology Integrators - Company

File Edit View Insert Format Tools Actions Help

Save And Close

General Profile History Sales Plan Survey

Company: Technology Integrators Business: (206)276-8976

Short/Other Name: Technology Integrators Business Fax:

Primary User: E-Mail:

Address... Suite 31 Westmont Office Park, 231 Newman Road, Kirkland, WA 98021, United States of America Business: Mailing Address:

Web page address:

Notes Groups Companies Contacts Users Teams Appointments Tasks Journals Documents E-Mail Opportunities Projects Products Attrib

6. Click **Save and Close** on the **Company Form**.

Take me back to the Exercise ([Adding a Company from a Project: Exercise](#))

Take me to the next Exercise ([Editing a Company to Project Association: Exercise](#))

5.5 Editing a Company to Project Association: Exercise

Editing a Company to Project: Association:

Project Name:	Upgrading of Computer Hardware and Infrastructure
----------------------	--

Company:	Technology Integrators
-----------------	-------------------------------

Show me the **Solution** ([Editing a Company to Project Association: Solution](#))

5.6 Editing a Company to Project Association: Solution

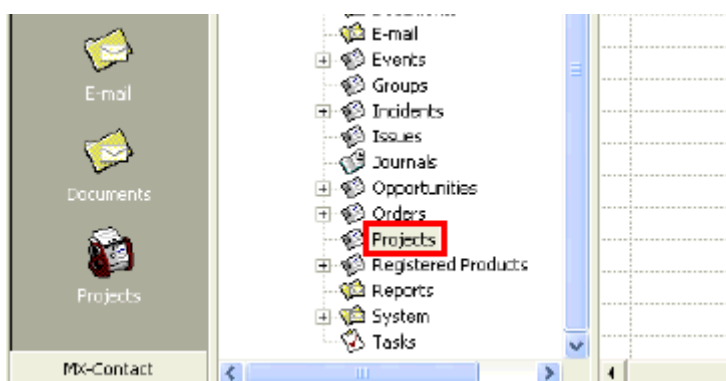
Editing a Company to Project Association:

Project Name:	Upgrading of Computer Hardware and Infrastructure
----------------------	--

Company:	Technology Integrators
-----------------	-------------------------------

Basic Steps:

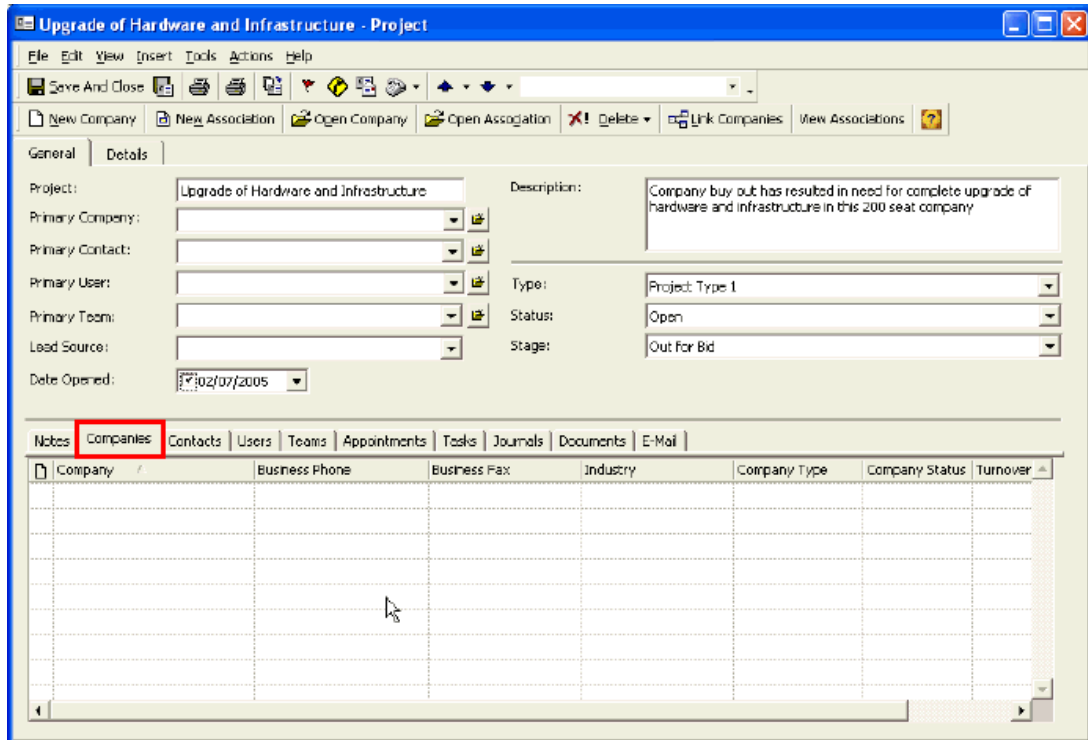
1. Select the **Projects** folder from the **Outlook Folder List**:



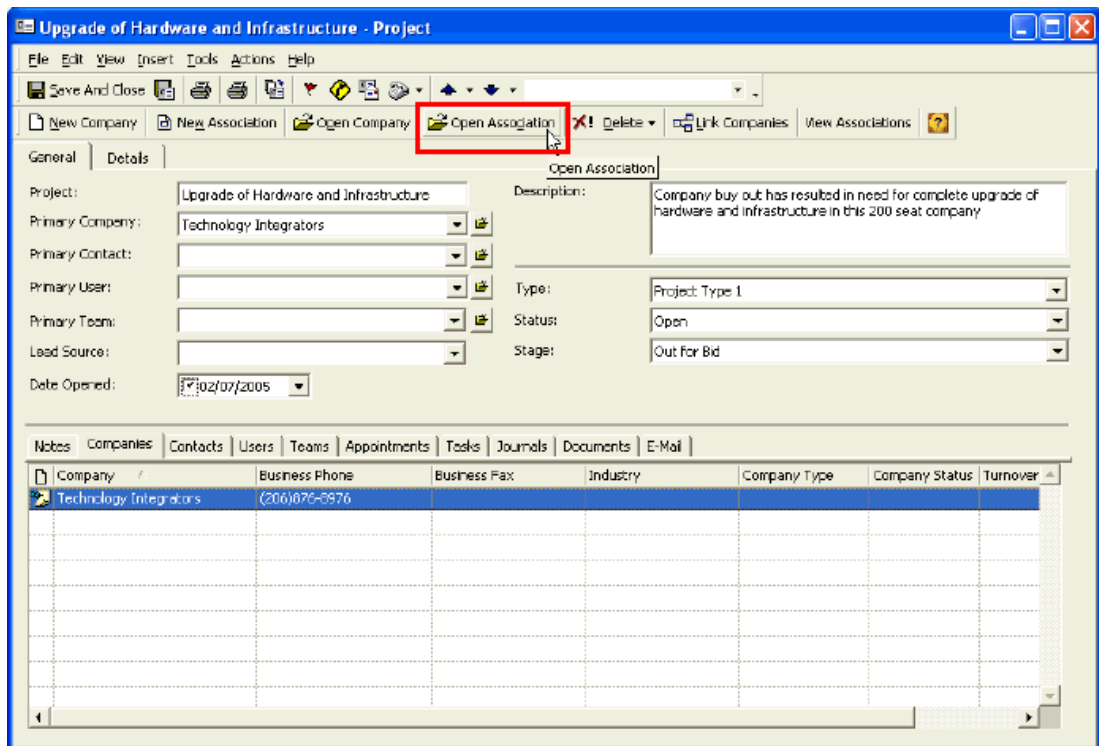
2. Open the following Project:

Project:	Project 100001
-----------------	-----------------------

3. Click on the **Companies Tab**.



4. Highlight Technology Integrators and then click on the **Open Association** button.



5. A **Project to Company Association** Screen will appear. Type **Contractor** into the **Relationship** field.

The screenshot displays the MX-Contact software interface for editing an opportunity. The window title is "Project 1000001 / Technology Integrators". The menu bar includes File, Edit, View, Insert, Format, Tools, Actions, and Help. The toolbar contains icons for Save and Close, Print, Copy, Paste, Undo, Redo, and other standard editing functions. The main form area is divided into several sections:

- Project:** A text field containing "Project 1000001".
- Company:** A text field containing "Technology Integrators".
- Relationship:** A dropdown menu currently set to "Contractor".
- Role:** An empty dropdown menu.
- Influence:** An empty dropdown menu.
- Benefits:** An empty text area.
- Issues:** An empty text area.
- Notes:** A large empty text area with a vertical scrollbar on the right side.

6. Click on **Save and Close**.

Take me back to the Exercise ([Editing a Company to Project Association: Exercise](#))

Take me to the next Exercise ([Attaching a Document to a Project: Exercise](#))

5.7 Attaching a Document to a Project: Exercise

You have prepared a costing sheet for this project in Excel. Attach the document to the project.

Project:	Upgrading of Computer Hardware and Infrastructure
Document Name:	Costing.xls

Show me the **Solution** ([Attaching a Document to a Project: Solution](#))

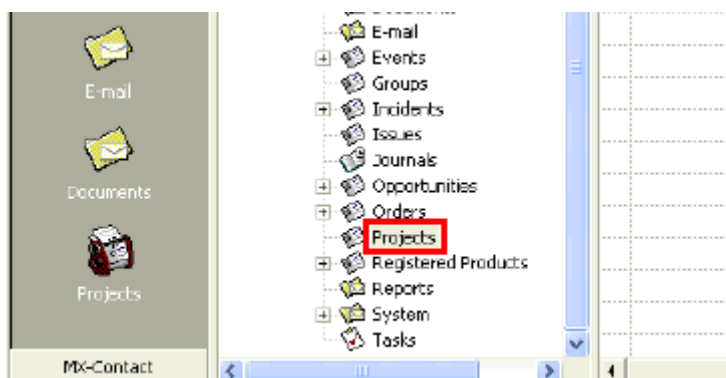
5.8 Attaching a Document to a Project: Solution

You have prepared a costing sheet for this project in Excel. Attach the document to the project.

Project:	Project 1000001
Document Name:	Costing.xls

Basic Steps:

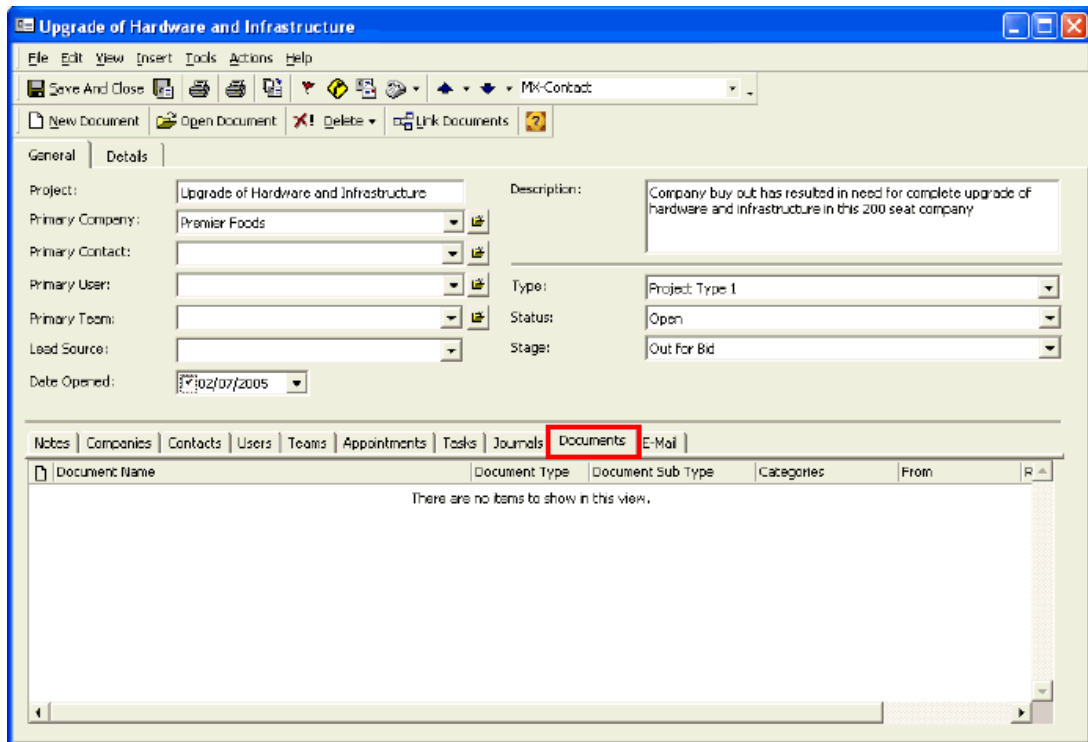
1. Select the **Projects** folder from the **Outlook** Folder List:



2. Open the following Project:

Project:	Project 1000001
-----------------	------------------------

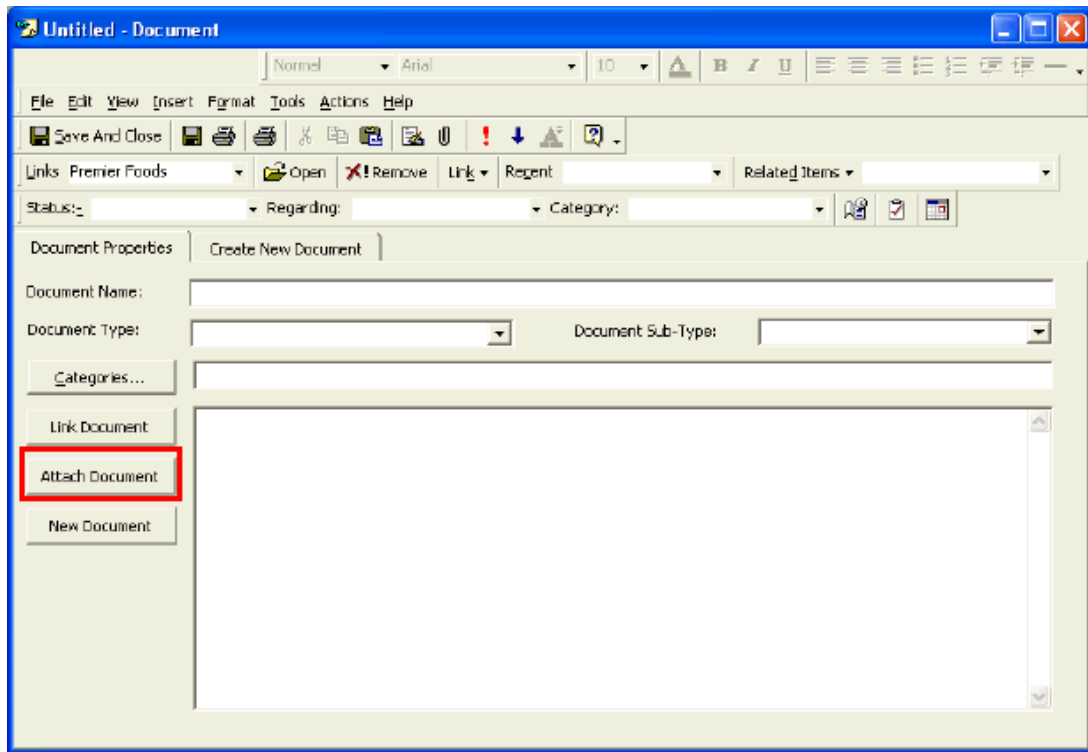
3. Click on the **Documents** Tab.



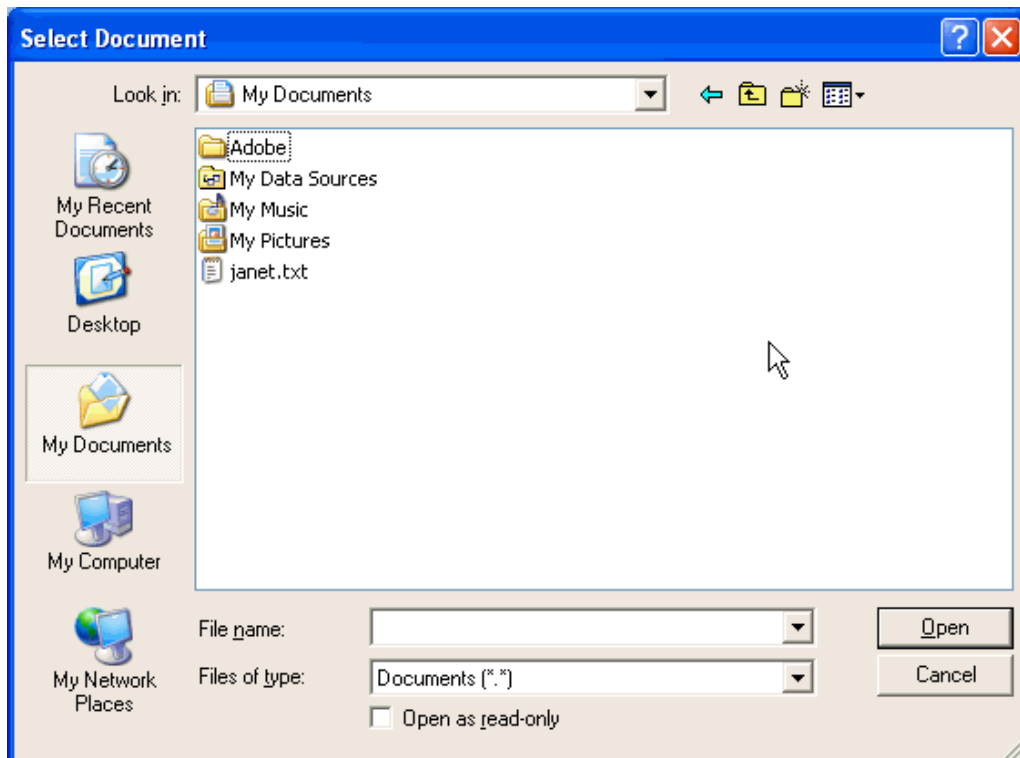
4. Click on the **New Document** button:



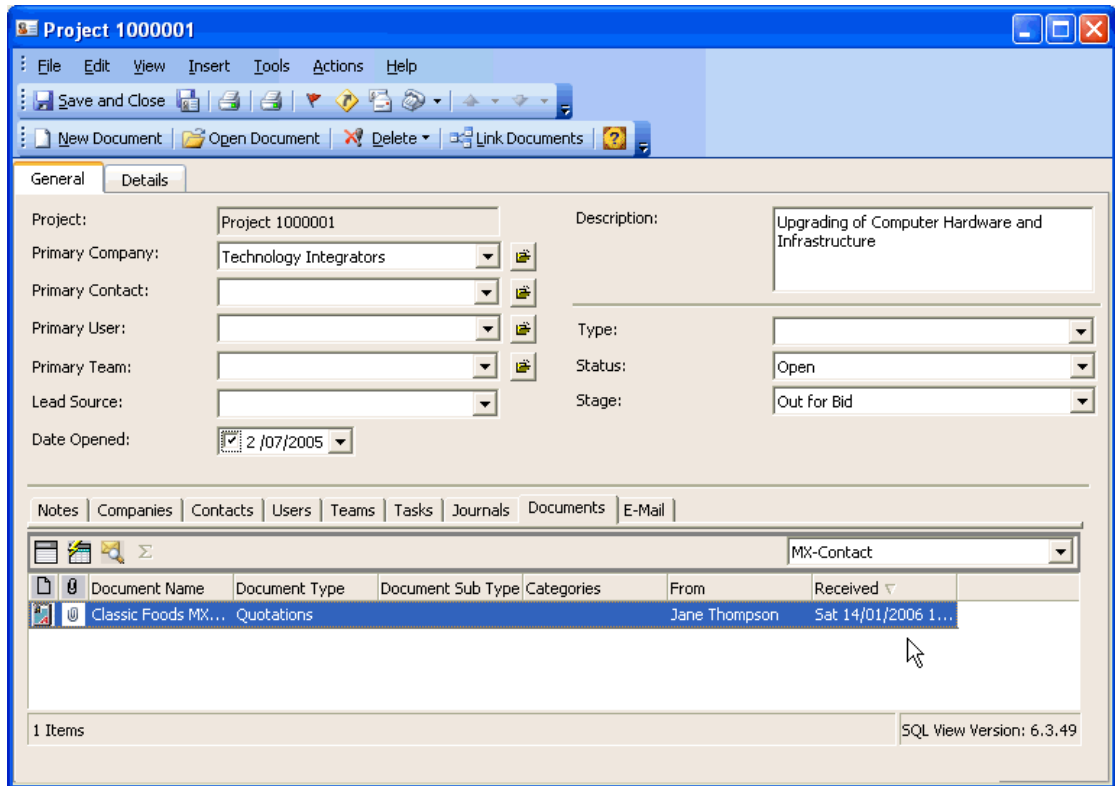
- Click on the **Attach Document** button:



- Select any document for tutorial purposes.



- Click **Save** and Close.
- The attached document will now appear on the **Documents tab** for this project.



Take me back to the Exercise ([Attaching a Document to a Project: Exercise](#))

Take me to the next Exercise ([Adding a Task to a Project: Exercise](#))

5.9 Adding a Task to a Project: Exercise

Create a Task from a Project to prepare a Project Costing Analysis for **Premier Foods**.

Complete the following information on the Task:

Project:	Upgrade of Hardware and Infrastructure
Subject:	Project Costing Analysis
Due Date:	2 weeks from Thursday
Category:	Sales - Prospect

Show me the **Solution** ([Adding a Task to a Project: Solution](#))

5.10 Adding a Task to a Project: Solution

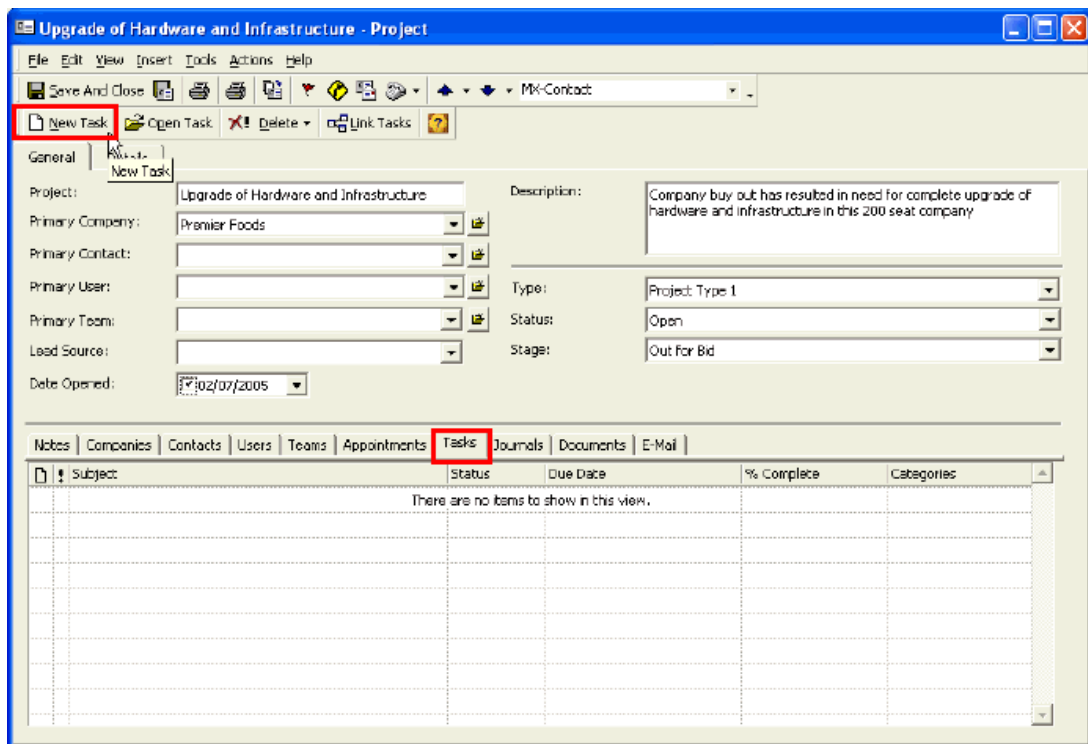
Create a Task from a Project to prepare a Project Costing Analysis for **Premier Foods**.

Complete the following information on the Task:

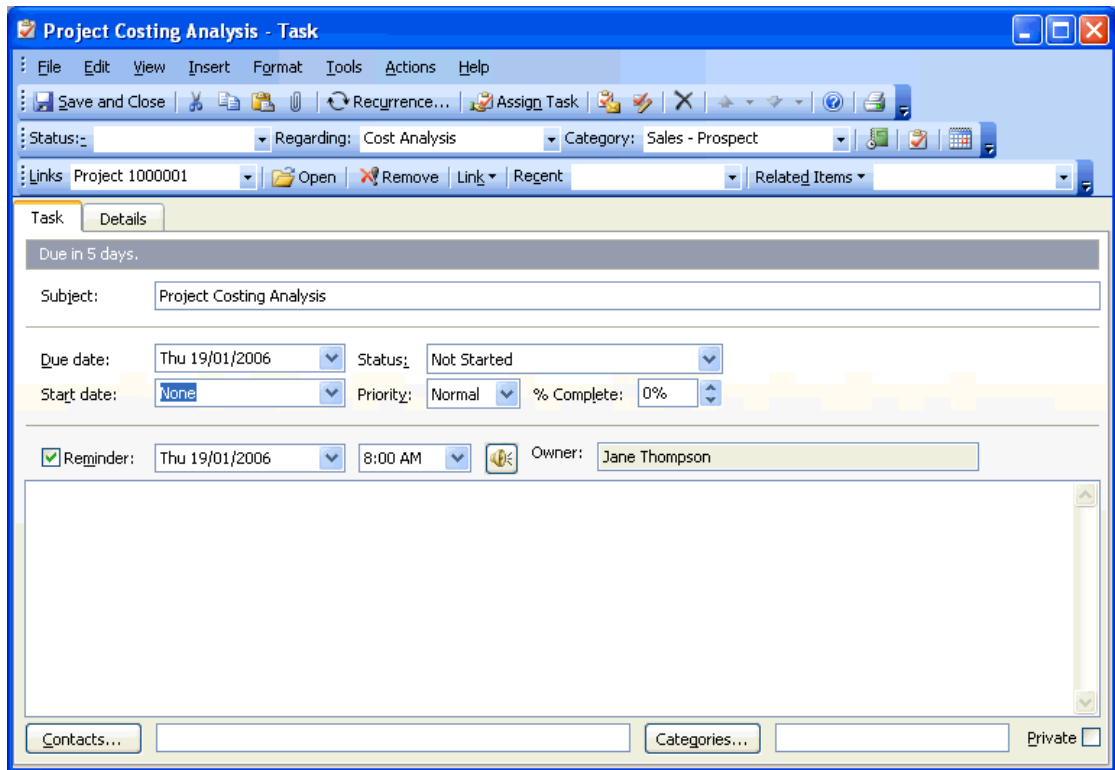
Project:	Project 1000001
Subject:	Project Costing Analysis
Due Date:	2 weeks from Thursday
Category:	Sales - Prospect

Basic Steps:

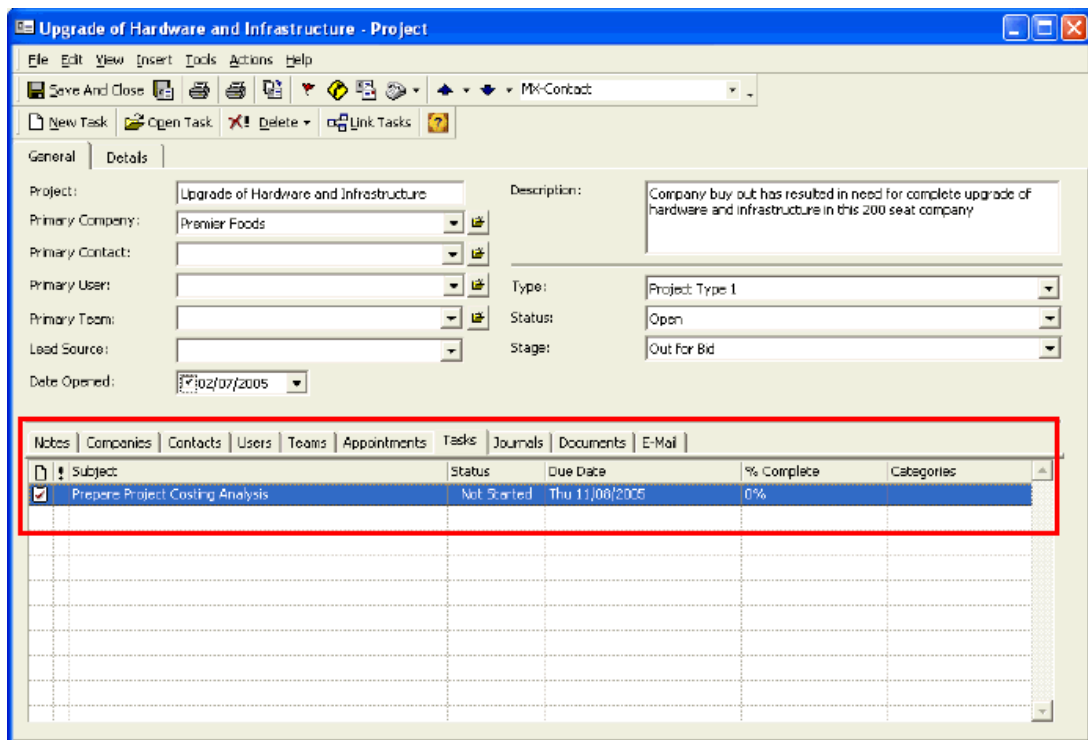
1. Open the Project "Project 1000001"
2. Once the Project form has opened, click on the **Tasks** Tab.



3. Click on **New Task**.
4. Enter the Task Details:



5. Click **Save and Close** on the Task. You should see the task displayed in the **Tasks Tab**:



Take me back to the Exercise ([Adding a Task to a Project: Exercise](#))

Take me to the next Exercise ([Tutorial Exercises – Sales Plans](#))

6 Tutorial Exercises – Sales Plans

The Sales Plan sub-folder off the Opportunities folder records the details of each Sales Plan generated for an opportunity.

In this section you will perform the following exercises:

1. **Adding a Sales Plan to an Opportunity**

[Adding an Opportunity Sales Plan: Exercise](#)

2. **Working with an Opportunity Sales Plan**

[Working with an Opportunity Sales Plan: Exercise](#)

3. **Run a Sales Plan Report**

[Running a Sales Plan Report: Exercise](#)

6.1 Adding an Opportunity Sales Plan: Exercise

Complete the following information on the Opportunity's **Sales Plan** tab:

Opportunity:	Opportunity 1000001
Company:	Premier Foods
Template:	Target Account Selling
Sales Plan Date:	25/07/2005
Status:	Open

Show me the **Solution** ([Adding an Opportunity Sales Plan: Solution](#))

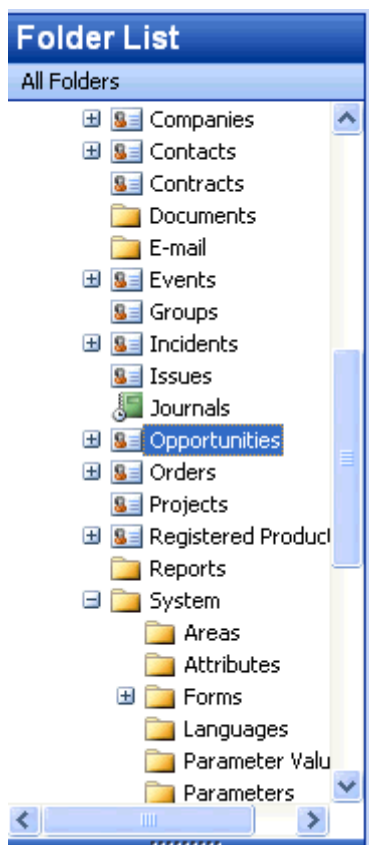
6.2 Adding an Opportunity Sales Plan: Solution

Complete the following information on the Opportunity's **Sales Plan** tab:

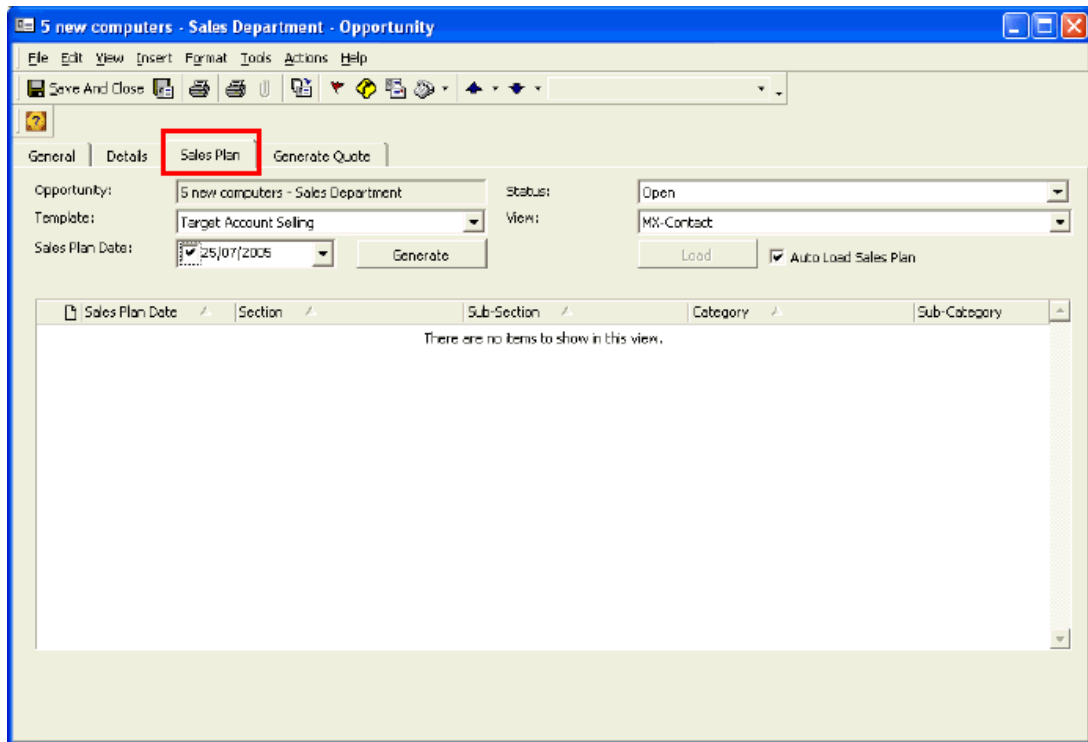
Opportunity:	Opportunity 1000001
Company:	Premier Foods
Template:	Target Account Selling
Sales Plan Date:	25/07/2005
Status:	Open

Basic Steps:

1. Select the **Opportunities** folder from the **Outlook Folder List**:



2. Select the **Opportunity** that you wish to generate a sales plan for.
3. Click on the **Sales Plan** tab. The following screen will appear.



4. Complete the following information and then click on the **Generate** button:

Template:	Target Account Selling
Sales Plan Date:	25/07/2005
Status:	Open

5. The sales plan that is generated will be ordered by Section, sub-Section and then by Category.
6. Click **Save and Close**.

Take me back to the Exercise ([Adding an Opportunity Sales Plan: Exercise](#))

Take me to the next Exercise ([Working with an Opportunity Sales Plan: Exercise](#))

6.3 Working with an Opportunity Sales Plan: Exercise

Use the following Opportunity's **Sales Plan**:

Opportunity:	Opportunity 1000001
Company:	Premier Foods
Sales Plan Date:	25/07/2005

Show me the **Solution** ([Working with an Opportunity Sales Plan: Solution](#))

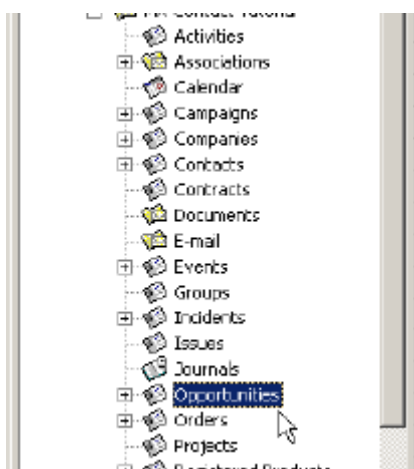
6.4 Working with an Opportunity Sales Plan: Solution

Use the following Opportunity's **Sales Plan**:

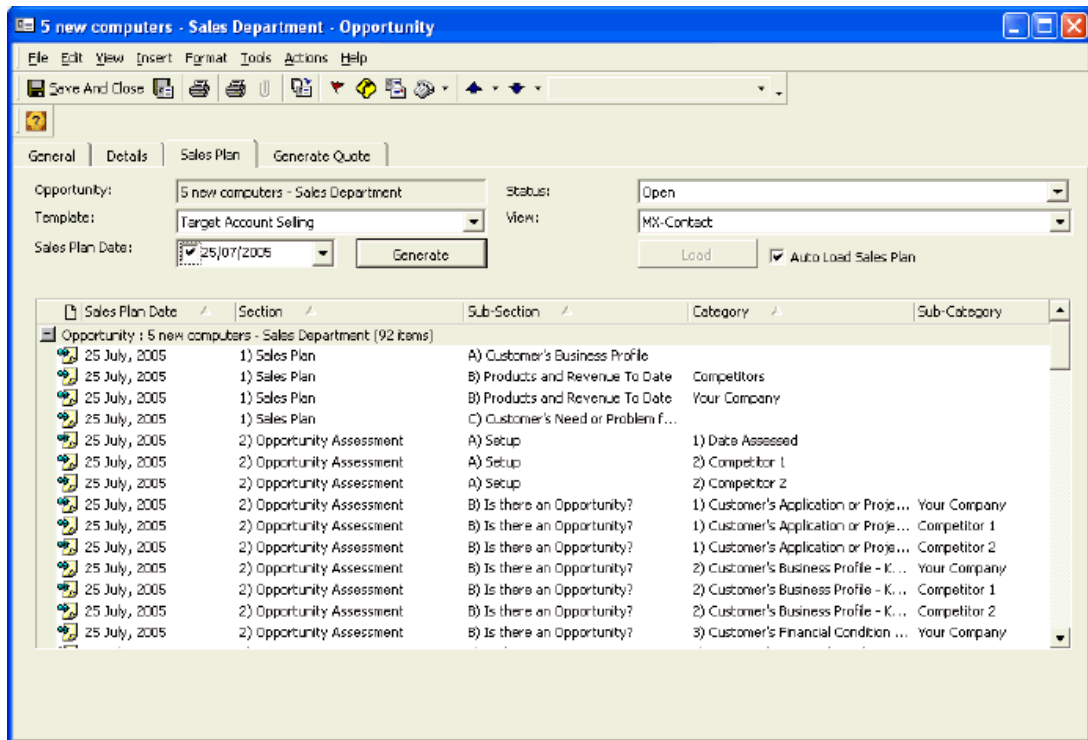
Opportunity:	Opportunity 1000001
Company:	Premier Foods
Sales Plan Date:	25/07/2005

Basic Steps:

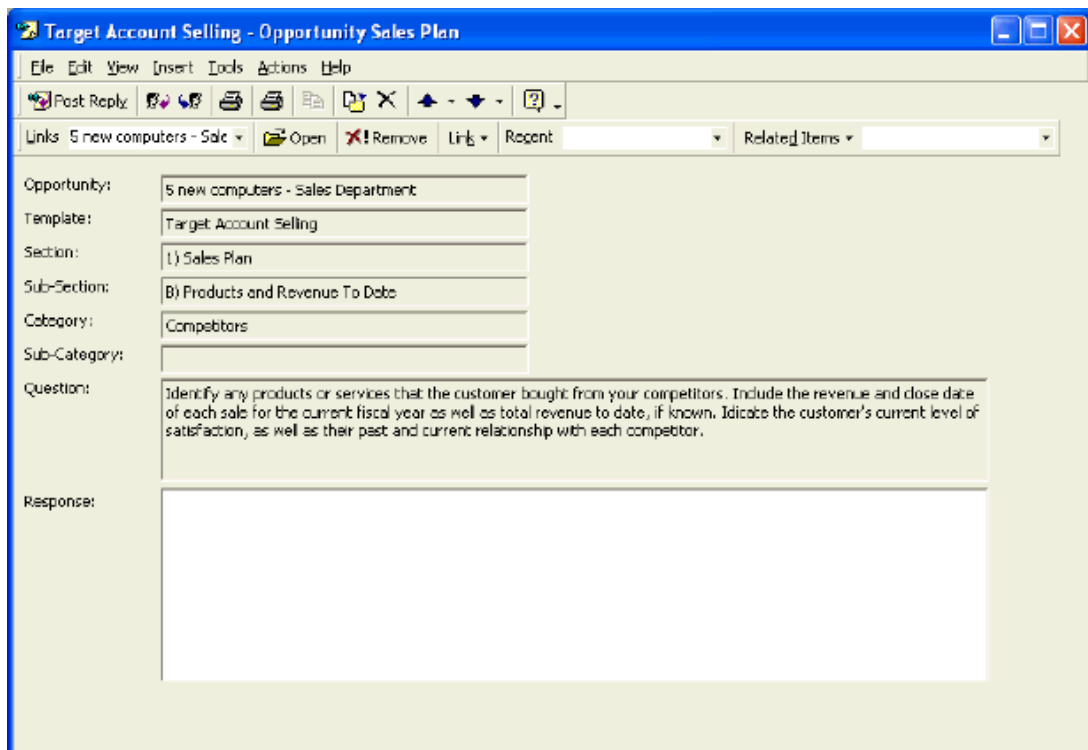
1. Select the **Opportunities** folder from the **Outlook Folder List**:



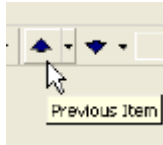
2. Select the **Opportunity** that has the sales plan that you wish to work with.
3. Click on the **Sales Plan tab**. The following screen will appear.



4. Double click on the first entry that you wish to work with.



5. As you work your way through the sales plan you can use the **Previous Item** or the **Next Item** buttons.



6. A new Sales Plan should be generated every six months to determine whether or not anything has changed in the interim. Change the Sales Plan Date to the new date and click **Generate**. A new plan will be generated.

Take me back to the Exercise ([Working with an Opportunity Sales Plan: Exercise](#))

Take me to the next Exercise ([Running a Sales Plan Report: Exercise](#))

6.5 Running a Sales Plan Report: Exercise

Run an Opportunity Sales Plan Report (Portrait).

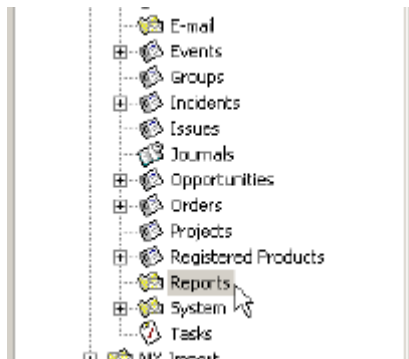
Show me the **Solution** ([Running a Sales Plan Report: Solution](#))

6.6 Running a Sales Plan Report: Solution

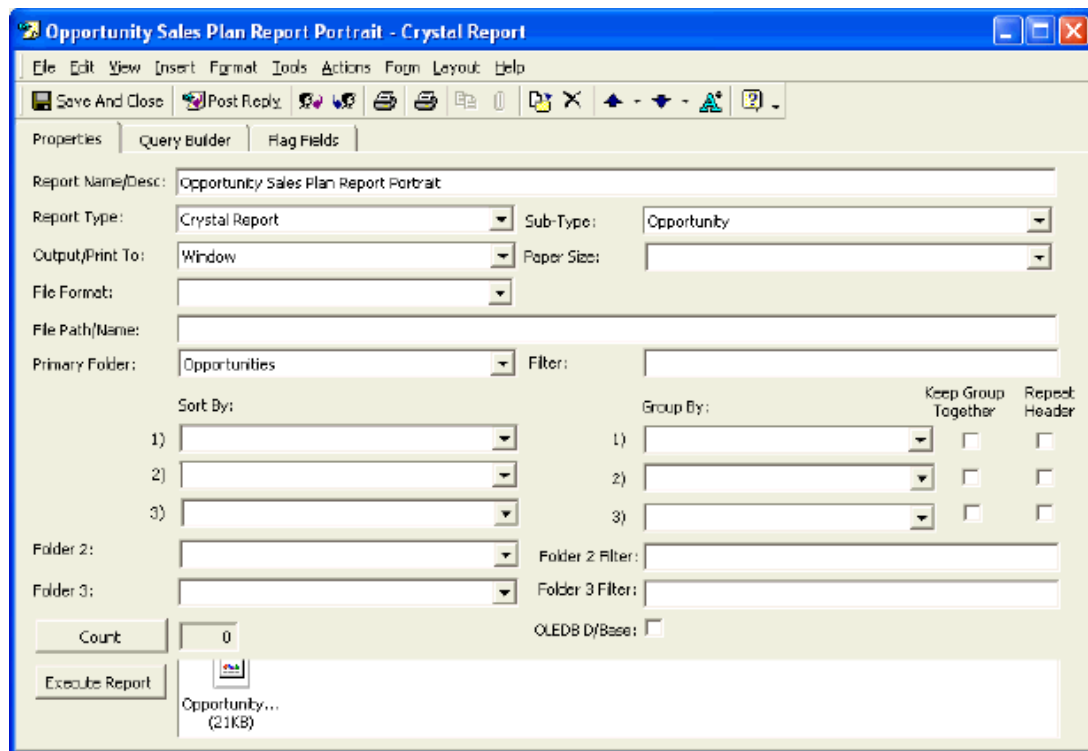
Run an Opportunity Sales Plan Report (Portrait).

Basic Steps:

1. Click on the **Reports Folder** in the **MX-Contact Folder List**.



2. Select the **Opportunity Sales Plan Report Portrait**.



3. Click on **Execute Report**. The report will be displayed as follows:

4/12/2004	12:00	Opportunity Sales Plan Report	Page 1 of 2
Opportunity: 0 new computers - Sales Department Description:			
Details:			
Primary Company:	Frank's Foods	Status:	Open
Primary Contact:		Stage:	Probability: 75%
Primary Product:		Date Opened:	02/12/2004
		Expected Close:	Potential: 20,000.00
Target Account Selling : 25/07/2004			
1) Sales Plan A) CUSTOMER'S BUSINESS PROFILE B) Product and Reasons To Date - Competitor B) Product and Reasons To Date - Your Company C) CUSTOMER'S NEED OR PROBLEM FOR THIS OPPORTUNITY			

4. Close the Report. Select **No** if you are prompted to 'Save Changes'.

Take me back to the Exercise ([Running a Sales Plan Report: Exercise](#))