

*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

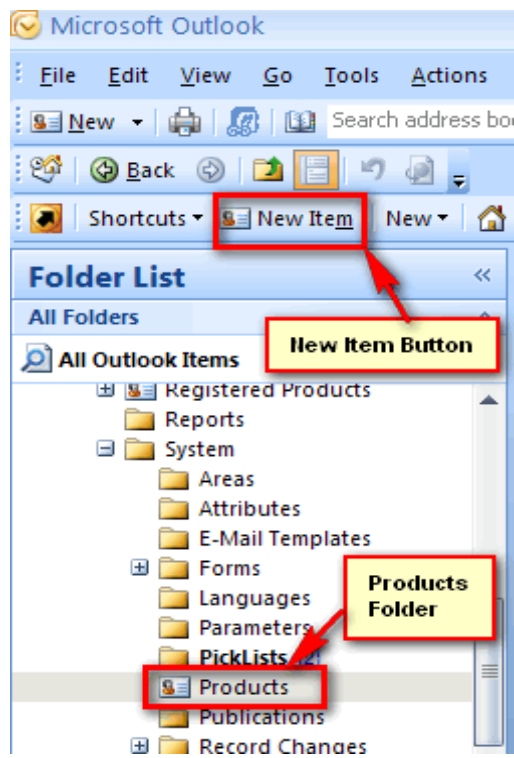
Add the HP Pavilion Notebook to the Product Register

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 **Products Sub-Folder**. Click on the **New Item** button.

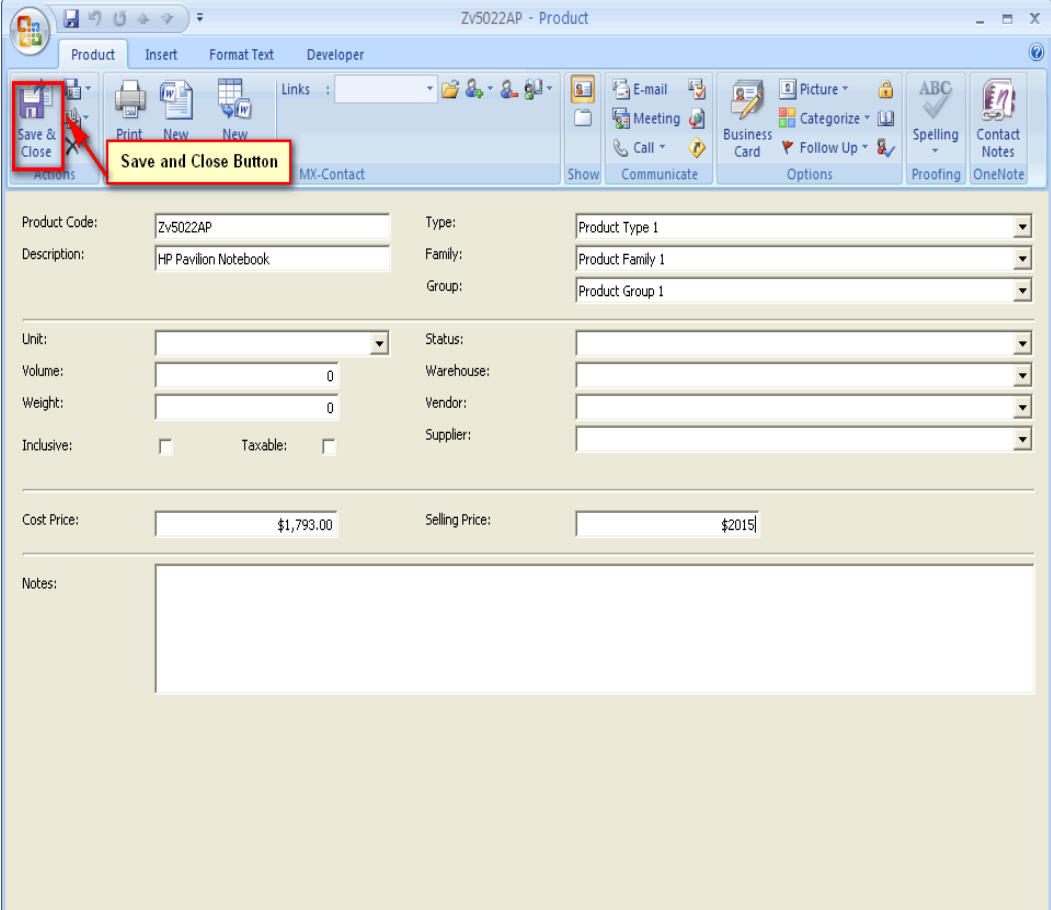


2. A blank **Product Form** will open:

- 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 the MX-Contact software interface for a product named 'Zv5022AP - Product'. The ribbon at the top includes tabs for 'Product', 'Insert', 'Format Text', and 'Developer'. The 'Product' tab is active, and the 'Save & Close' button is highlighted with a red box and a red arrow. A callout box points to the 'Save & Close' button with the text 'Save and Close Button'. The main form contains the following fields:

Product Code:	Zv5022AP	Type:	Product Type 1
Description:	HP Pavilion Notebook	Family:	Product Family 1
		Group:	Product Group 1
Unit:		Status:	
Volume:	0	Warehouse:	
Weight:	0	Vendor:	
Inclusive:	<input type="checkbox"/>	Supplier:	
Taxable:	<input type="checkbox"/>		
Cost Price:	\$1,793.00	Selling Price:	\$2015
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

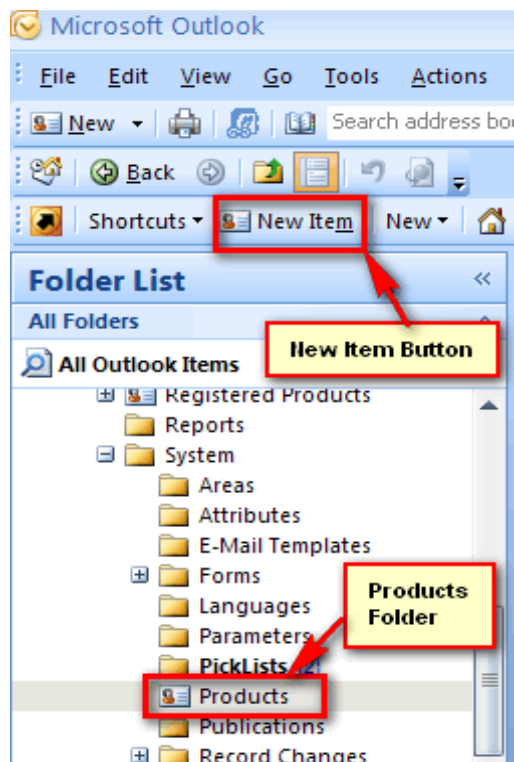
Add the Microsoft Optical Mouse to the Product Register.

Complete the following information:

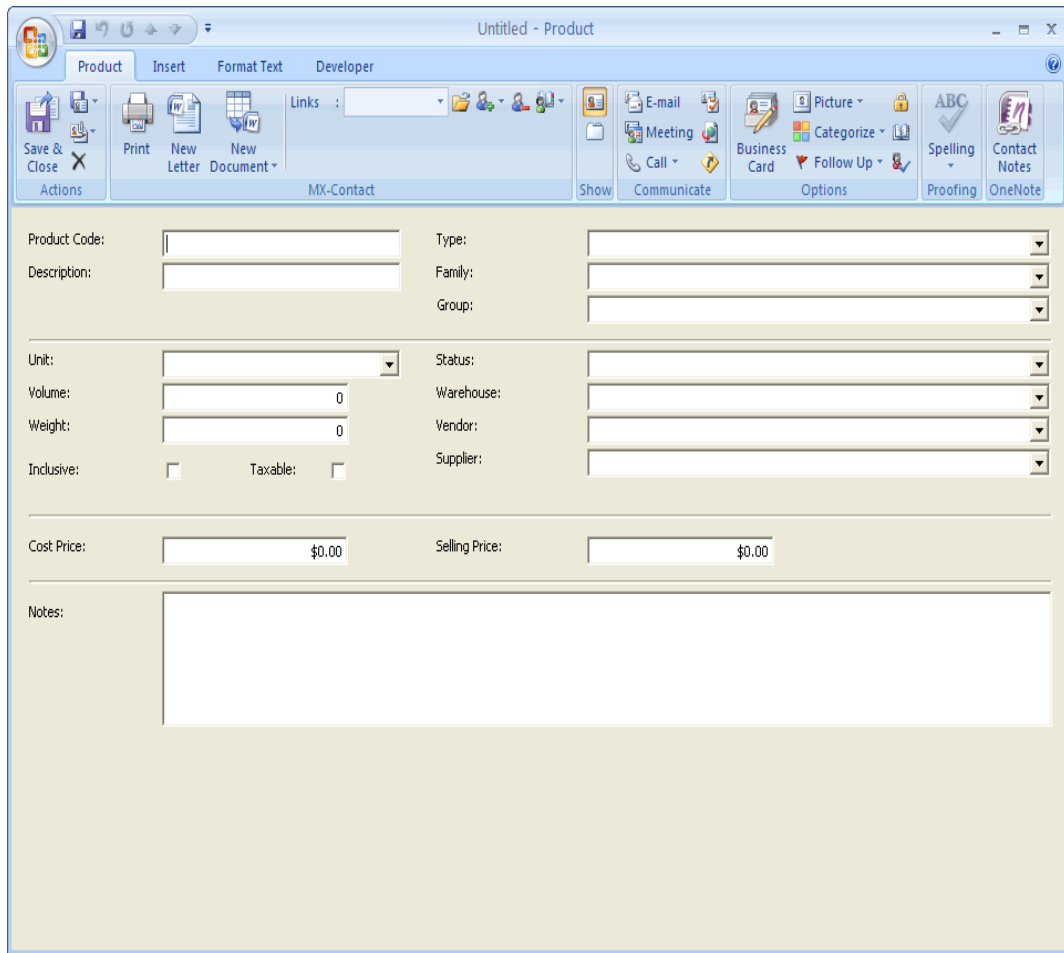
Product Code:	ITE78CJ
Description:	Microsoft Optical Mouse
Type:	Product Type 2
Family:	Product Family 2
Group:	Product Group 2
Cost Price:	\$43
Selling Price:	\$55

Basic Steps:

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



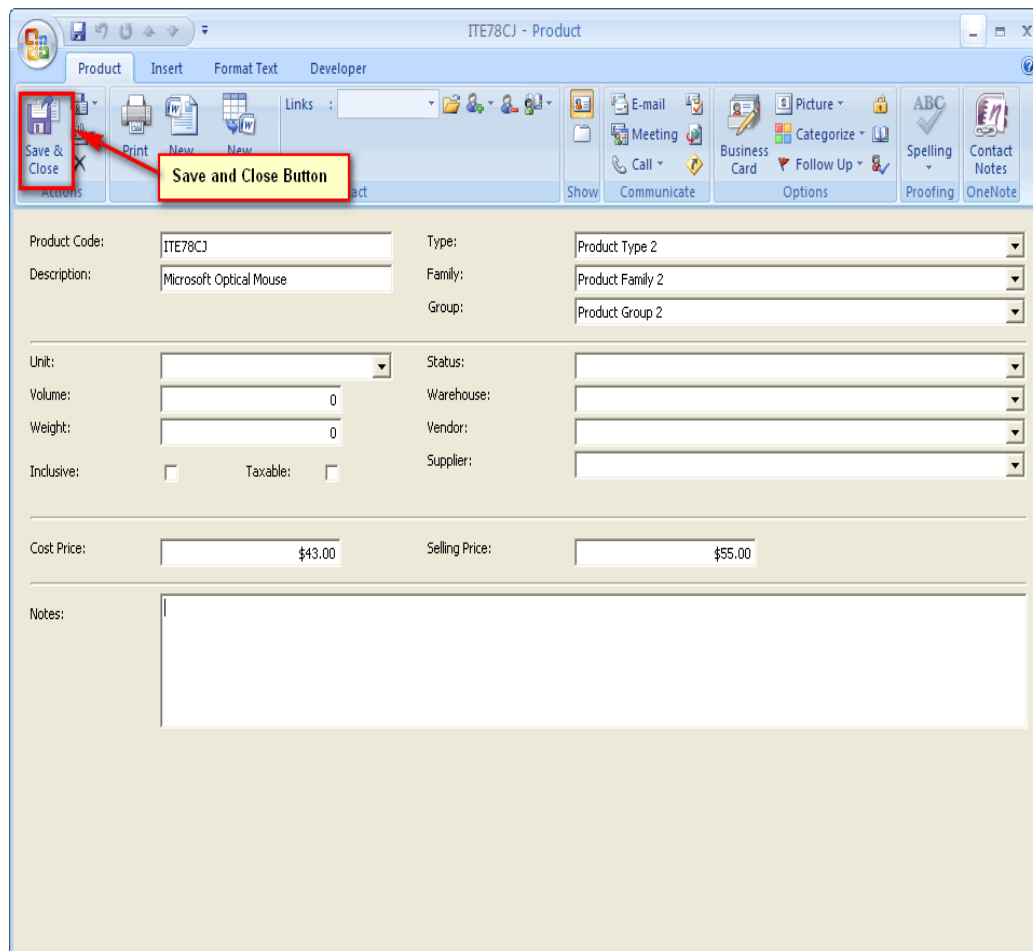
2. A blank **Product Form** will open:



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



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:	7/06/2011
Status:	Open
Probability:	75%
Expected Value:	\$20,000

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

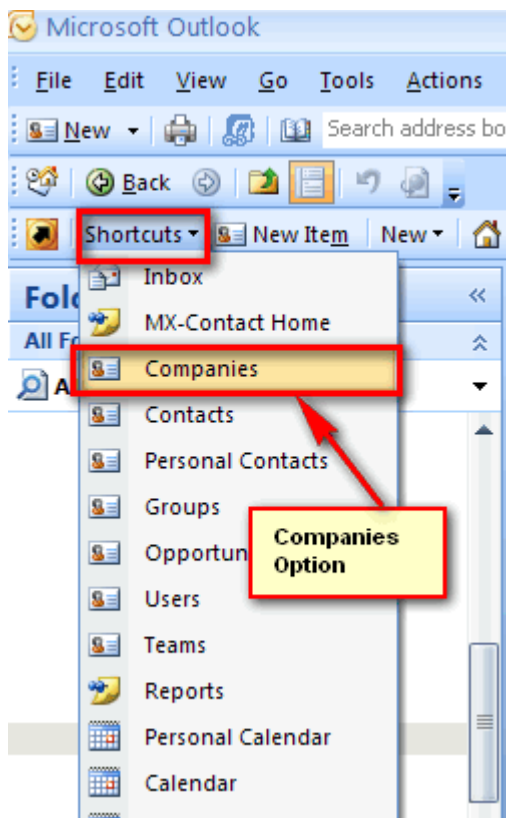
3.2 Adding an Opportunity from a Company: Solution

Add an opportunity from the Company Form.

Company:	Premier Foods
Opportunity:	5 new computers - Sales Department
Lead source:	Lead Source 1
Date Opened:	7/06/2011
Status:	Open
Probability:	75%
Expected Value:	\$20,000

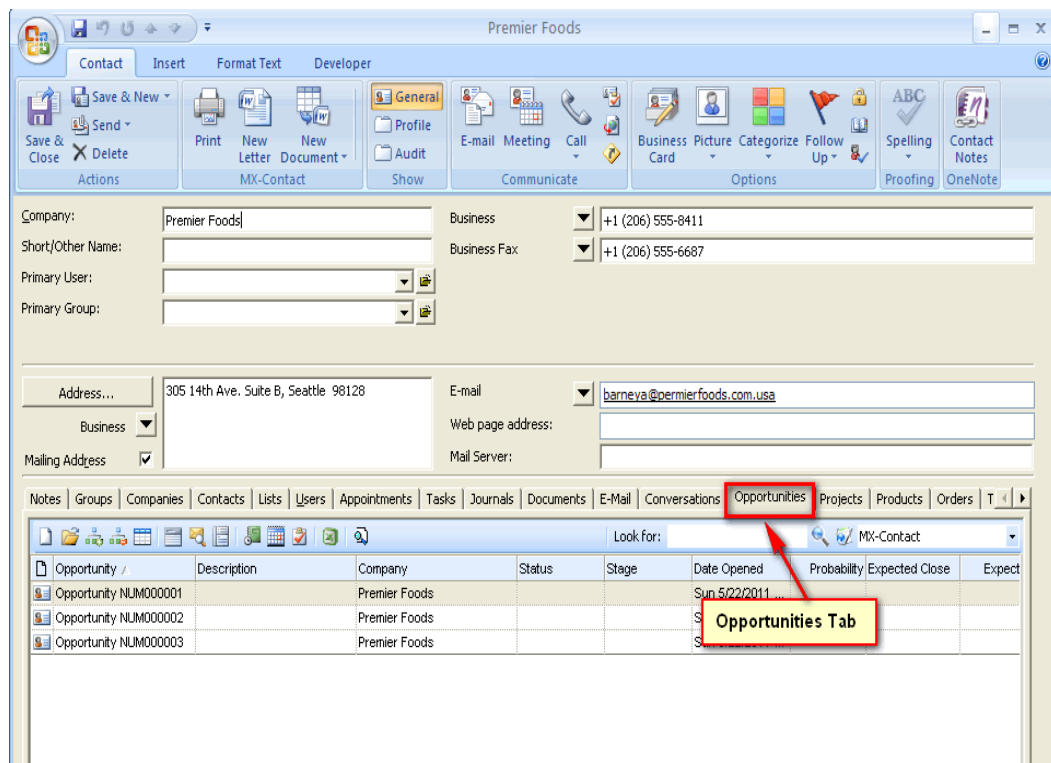
Basic Steps:

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

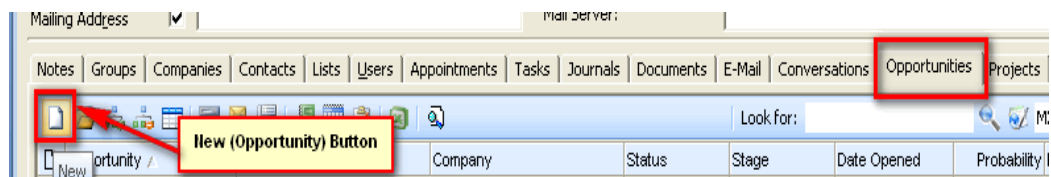


2. Open the Company **Premier Foods**

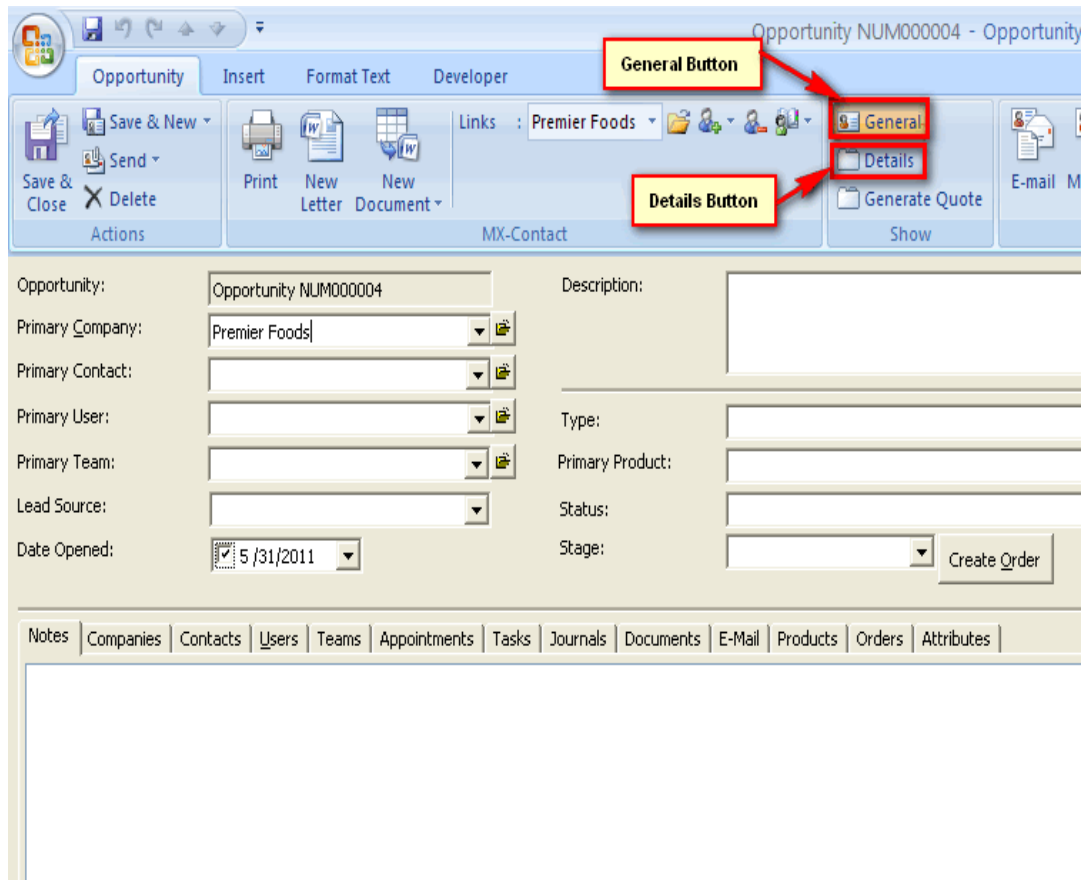
3. Click on the **Opportunities** Tab:



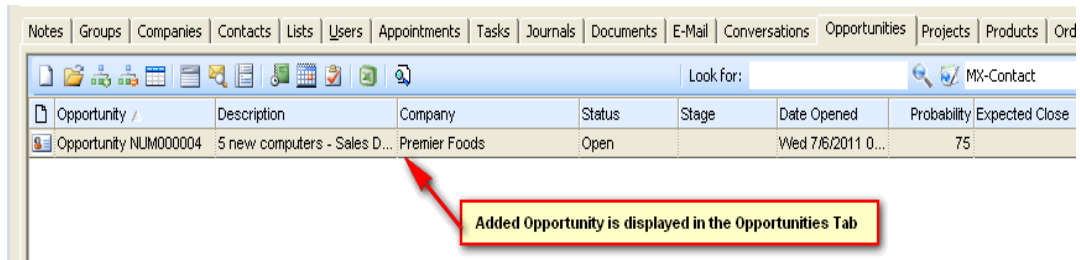
4. Click on **New (Opportunity)** button to add the opportunity:



5. 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**.



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



7. 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:	07/12/2011
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:

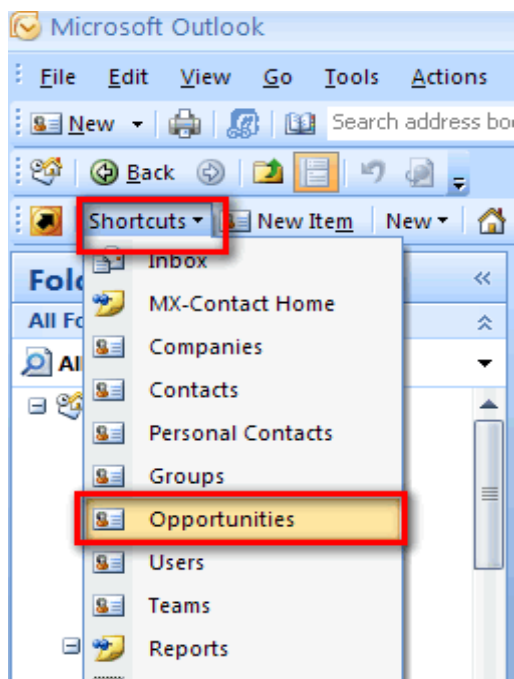
Opportunity:	Network Upgrade – 10 Computers
Lead source:	Lead Source 1
Date Opened:	07/12/2011
Type:	Opportunity Type 1
Status:	Open

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

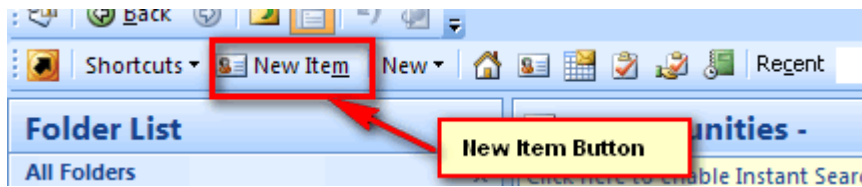
Probability:	60%
Expected Value:	\$80,000

Basic Steps:

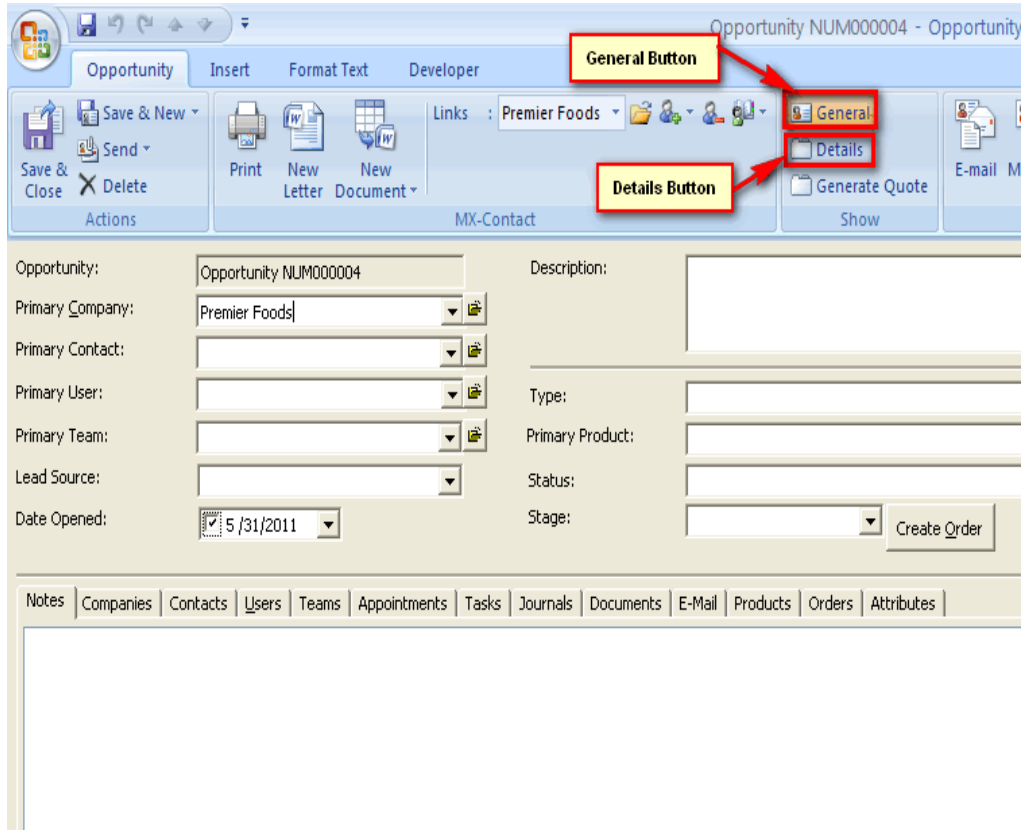
1. Select the **Opportunities** Shortcut from the **Shortcuts Menu** on the **MX-Contact Toolbar**:



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

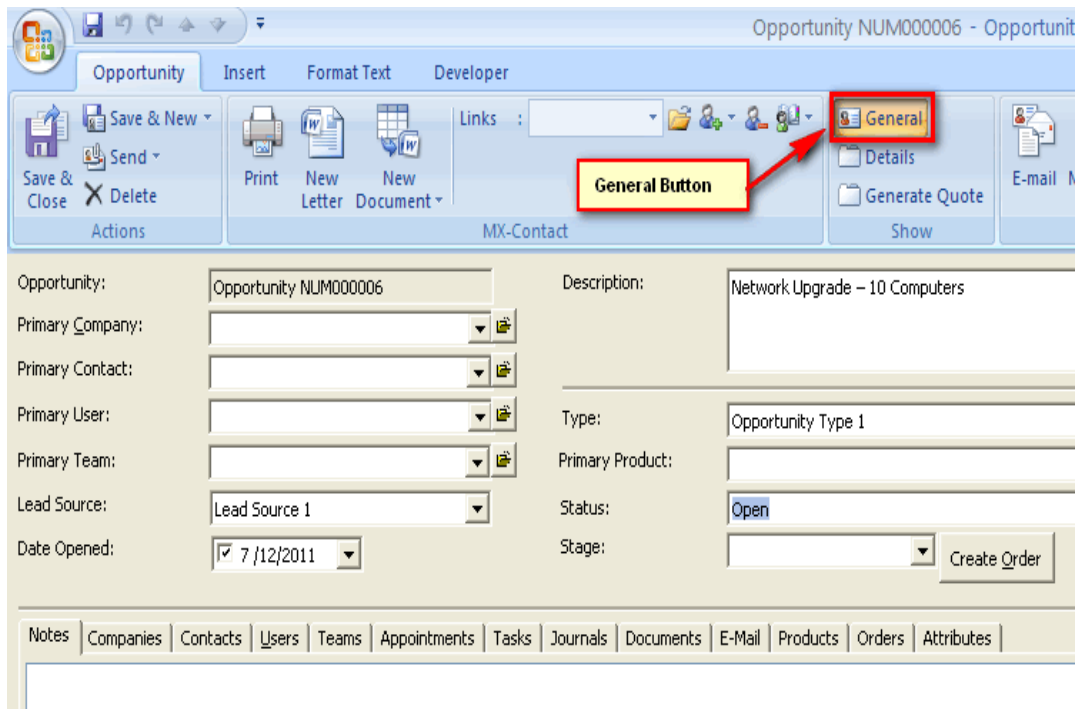


3. A blank **Opportunity Form** will open:



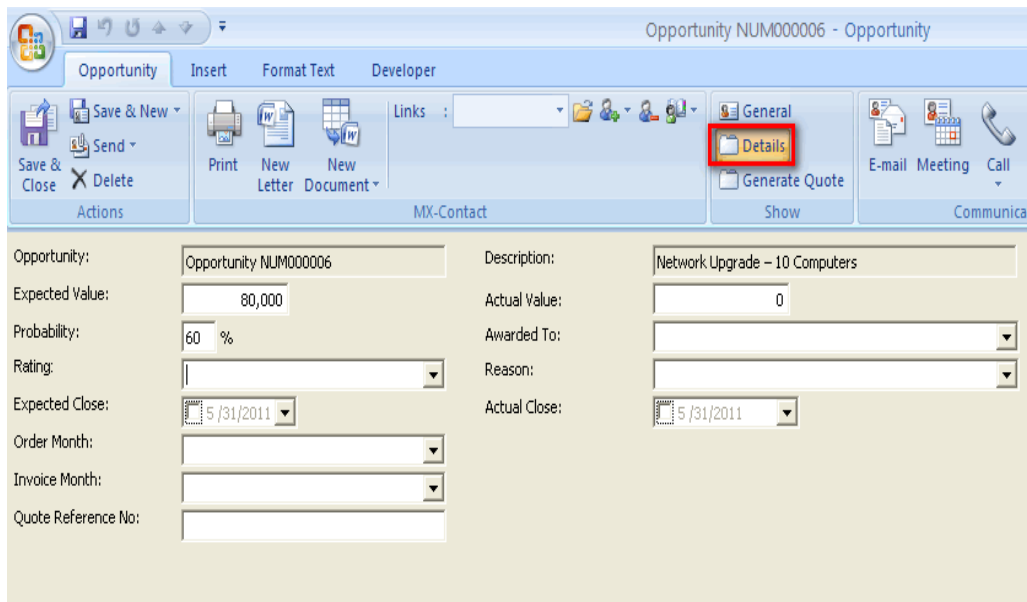
4. In the New Opportunity form, add the details for the Network Upgrade. Complete the following Information on the **General Tab**.

Opportunity:	Network Upgrade – 10 Computers
Lead source:	Lead Source 1
Date Opened:	07/12/2011
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:

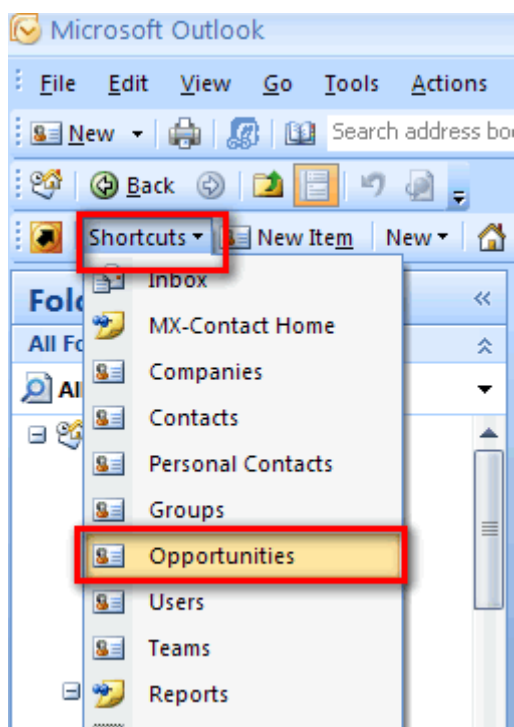
Opportunity Name:	Network Upgrade – 10 Computers
--------------------------	---------------------------------------

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

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

Basic Steps:

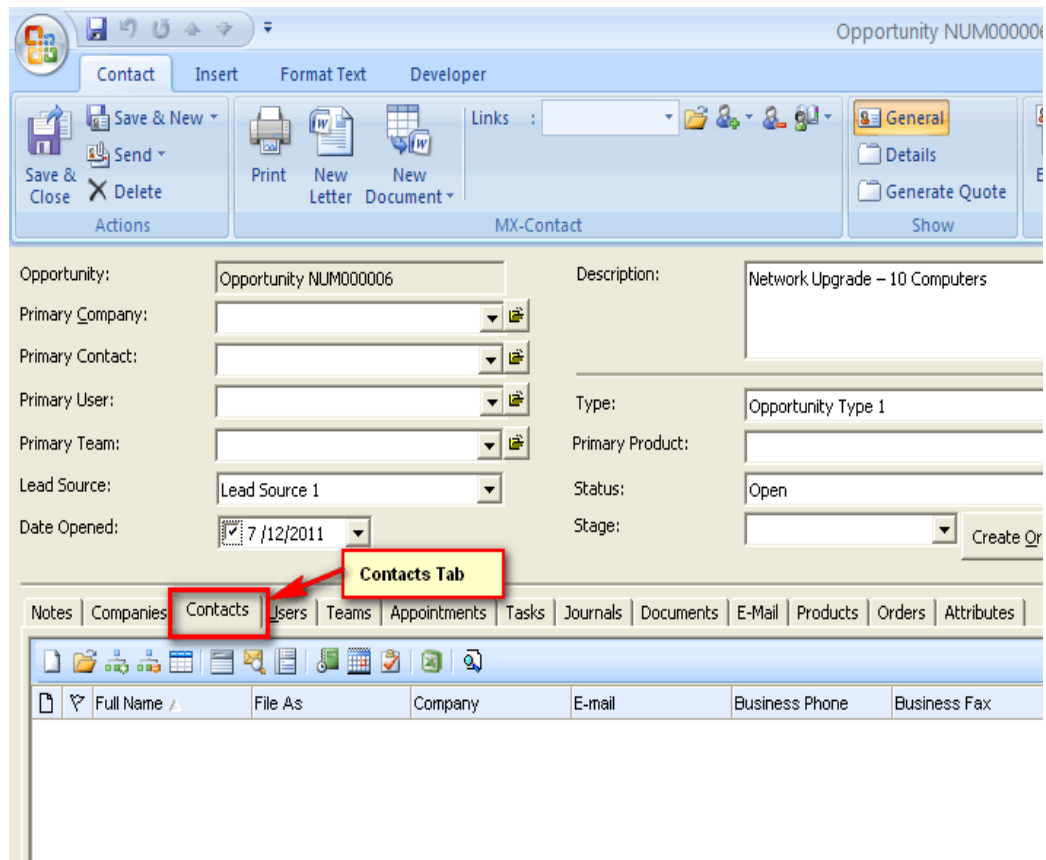
1. Select the **Opportunities** Shortcut from the **Shortcuts** Menu on the **MX-Contact** Toolbar:



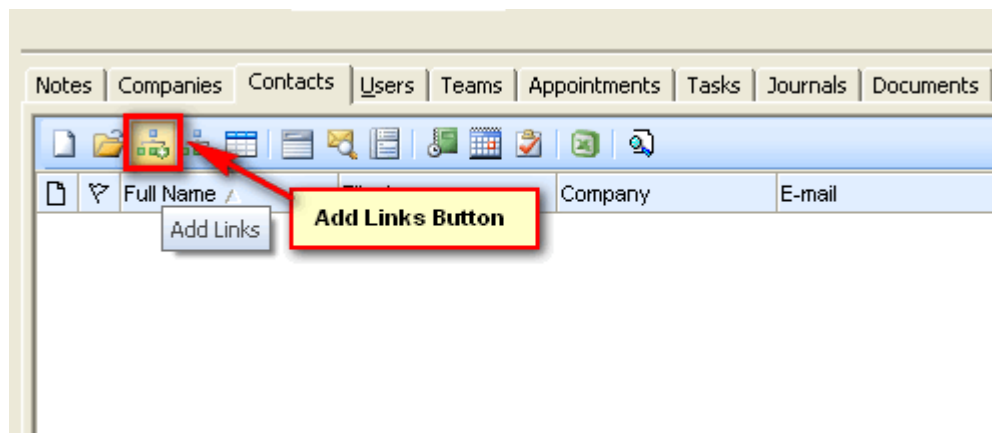
2. Open the following opportunity. To open it, double click on that record.

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

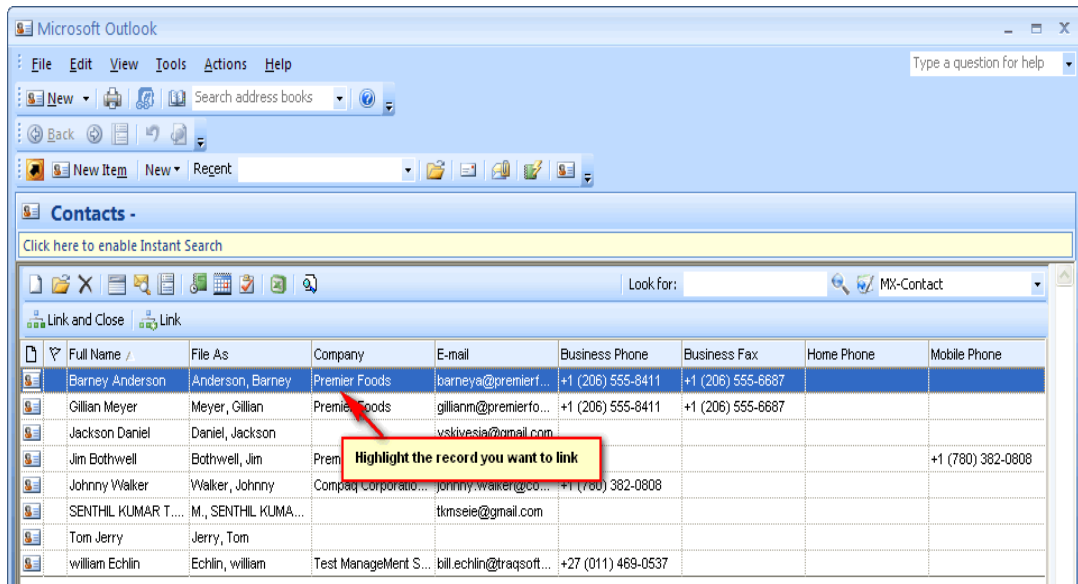
3. Click on the **Contacts** Tab.



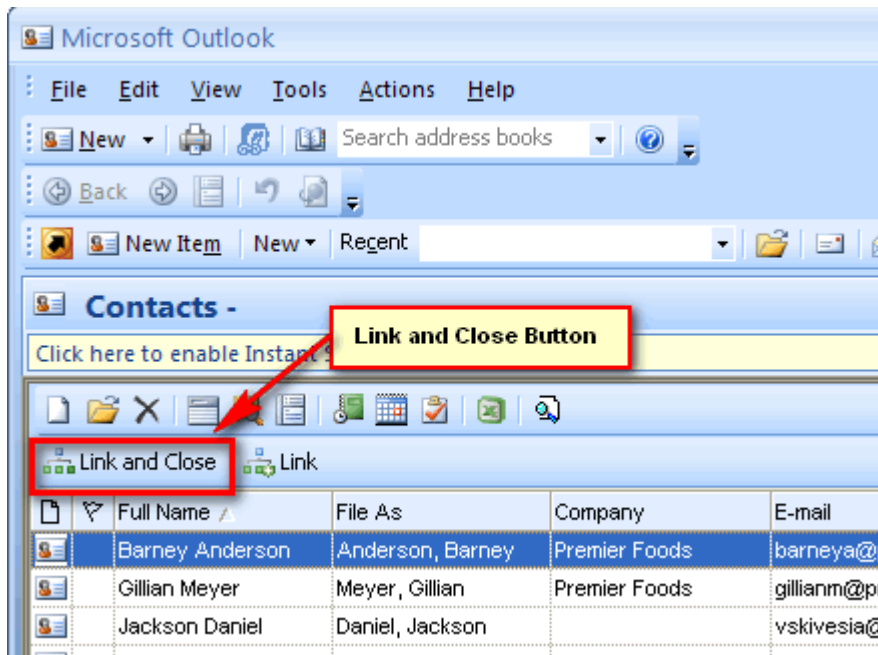
4. Click on the **Add Links** button..



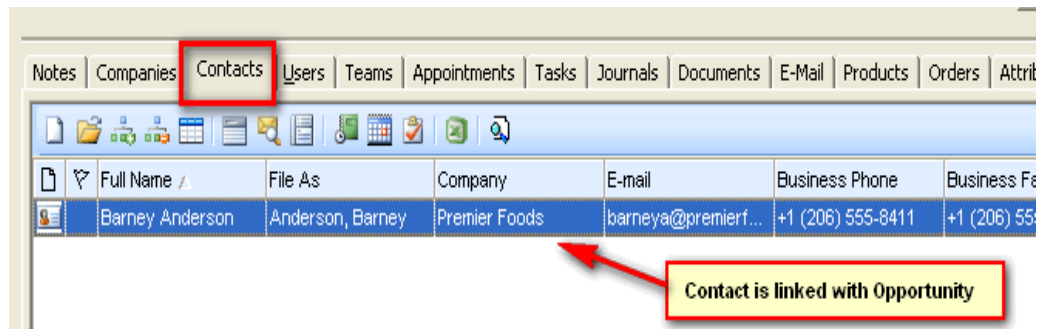
5. Search for and highlight Barney Anderson.



6. Click **Link and Close**.



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



8. 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**.



9. 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

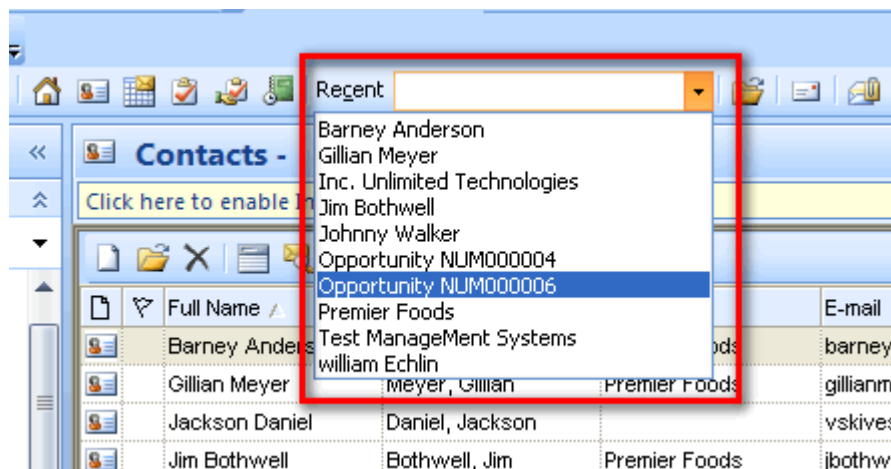
You receive a telephone call from Barney Anderson who has received your proposal and your follow up e-mail. He had some additional questions about commercial terms and conditions. Add a journal to the opportunity to record the details of this call.

Complete the following information:

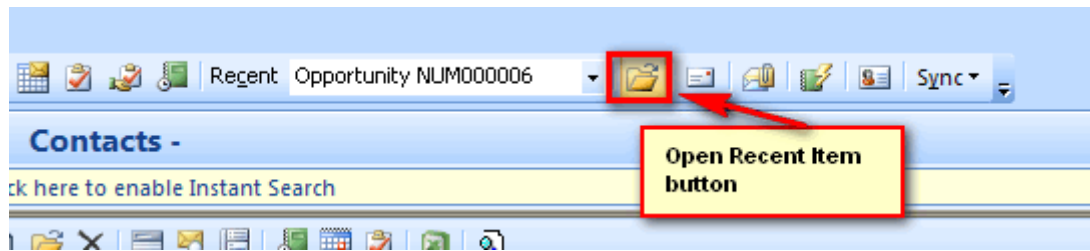
Opportunity:	Network Upgrade – 10 Computers
Subject:	Called about terms and conditions
Entry Type:	Phone Call
Duration:	15 mins
Memo:	Barney wanted to know if they could have 30 day payment terms. Said this was standard with all their suppliers. I told him there should be no problem with this, Premier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

Basic Steps:

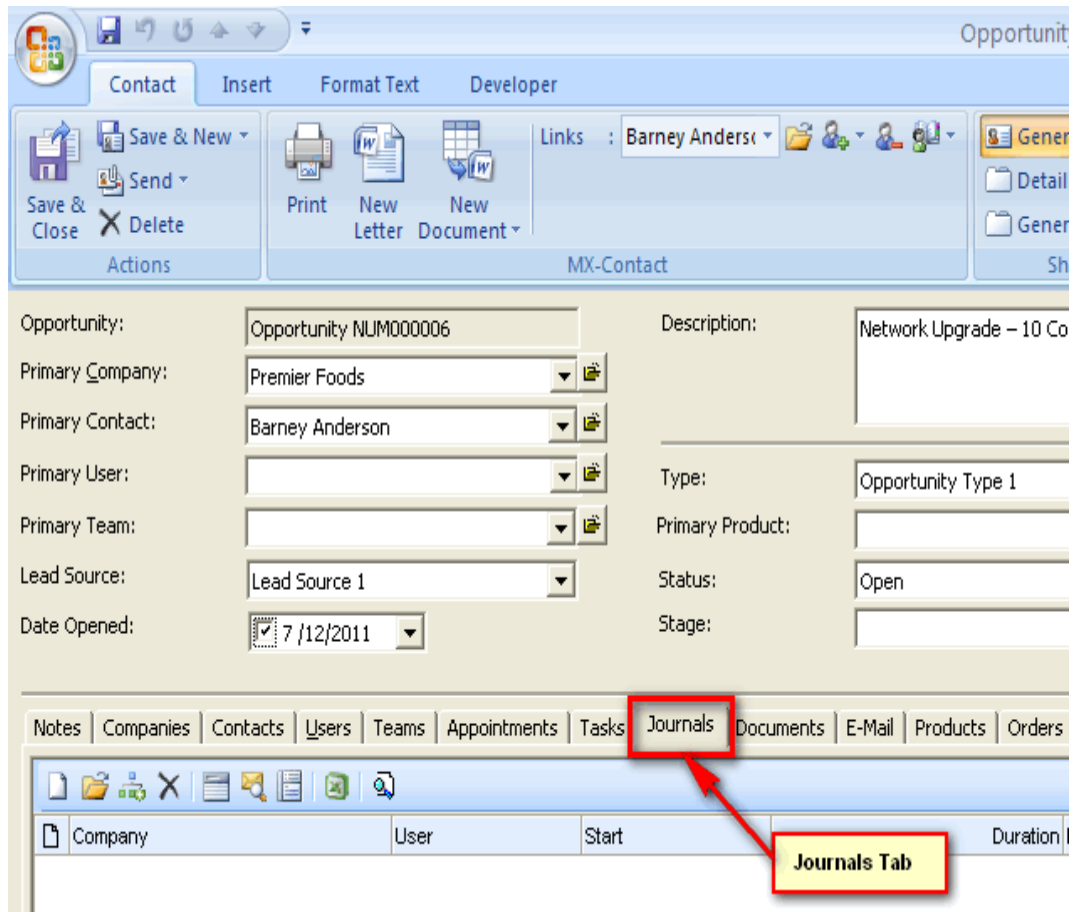
1. Open the opportunity “**Network Upgrade – 10 Computers**” (try this from Recent Items). Click on the **Recent** drop down list and select “**Opportunity NUM000006**” (This value is system generated. You may have different ID for this opportunity).



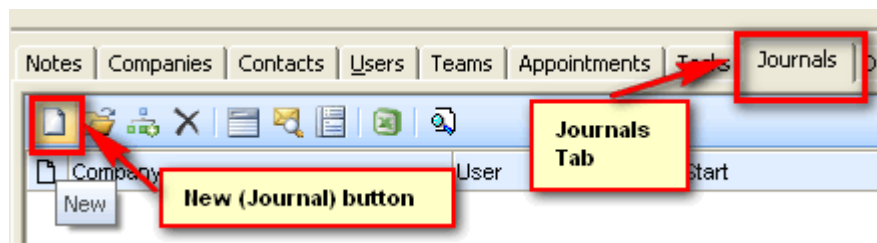
2. Click on the **Open Recent Item** button.



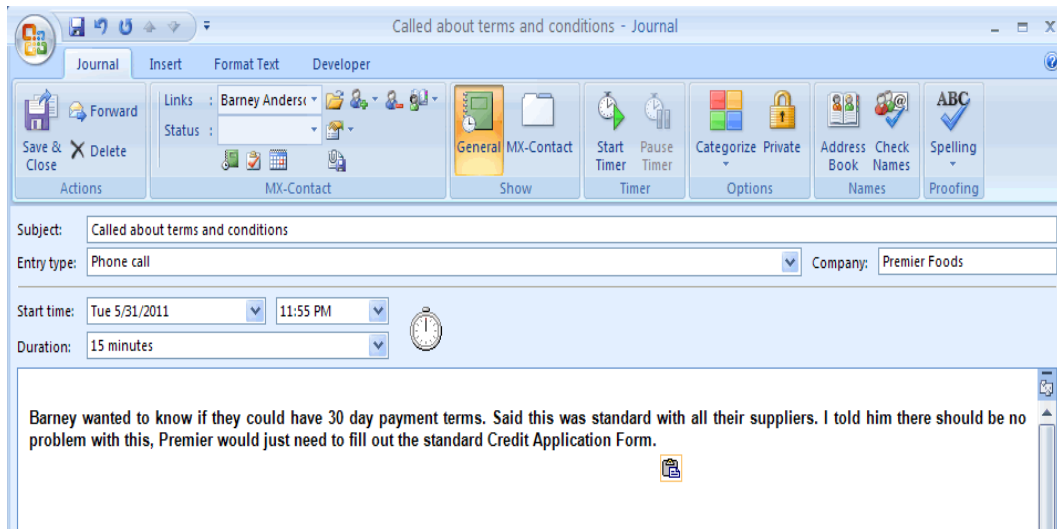
3. Click on the **Journals Tab**



4. Click on **New (Journal)** button.

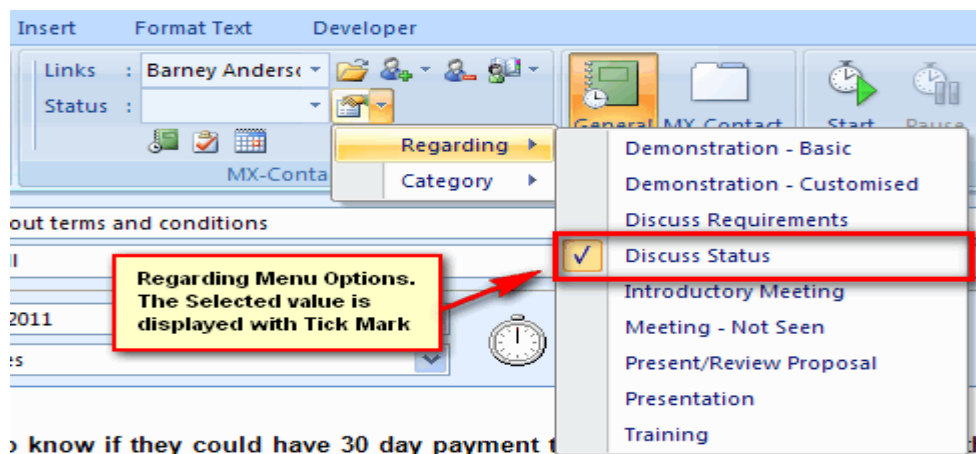


5. Enter the **Journal** Details:

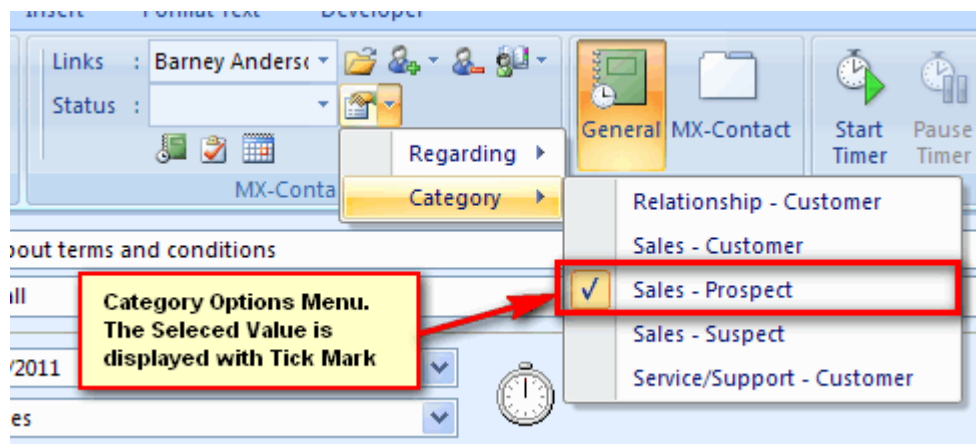


- The **Regarding** and **Category** fields are available in **MX-Contact Ribbon Add in**.

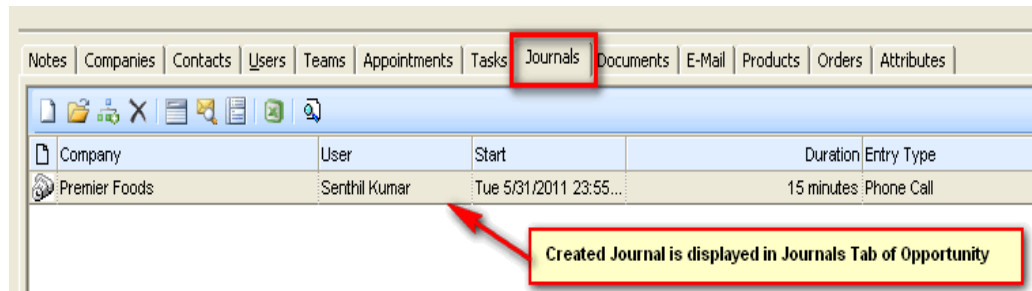
Regarding:



Category:



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



8. 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](#))

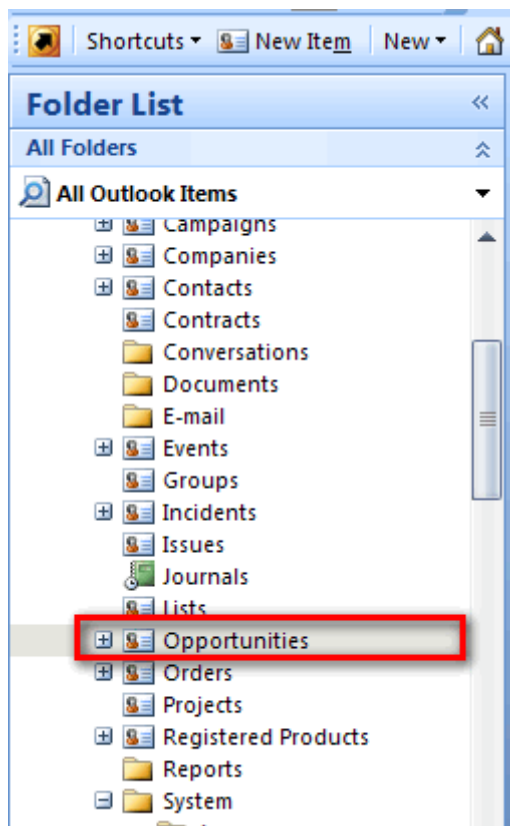
3.10 Adding Opportunities to the Link Items Menu: Solution

You want add opportunities to the Link Items Menu.

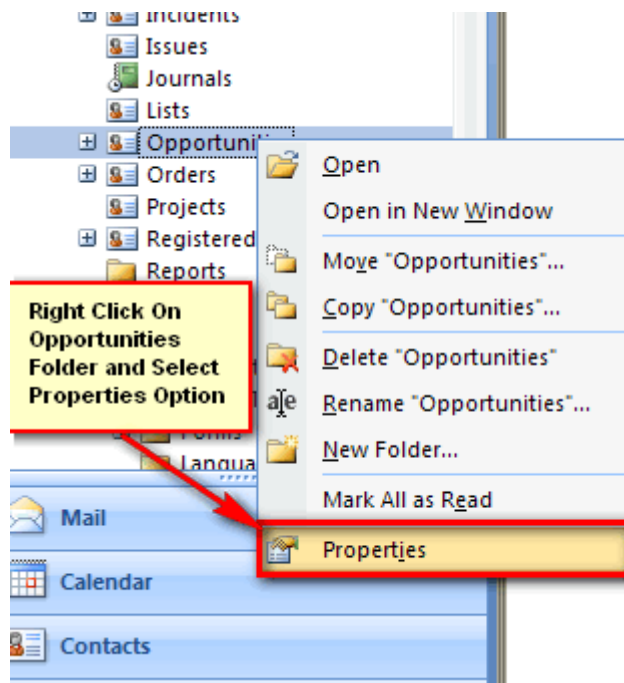
Link Items Menu:	Opportunities
------------------	---------------

Basic Steps:

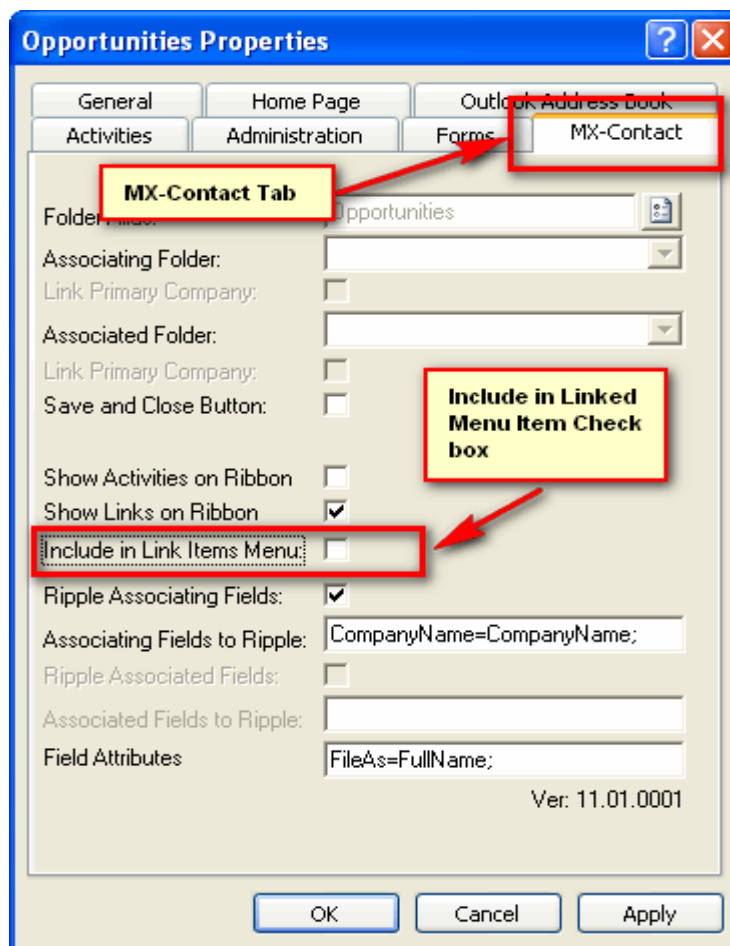
1. Select the **Opportunities Folder** from the **MX-Contact Folder List**:



2. Right click on **Opportunities** and select **Properties**.



3. Click on the **MX-Contact Tab**. The following screen will appear:



4. Tick the box for **Include in Link Items Menu** and then click on OK.
5. 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

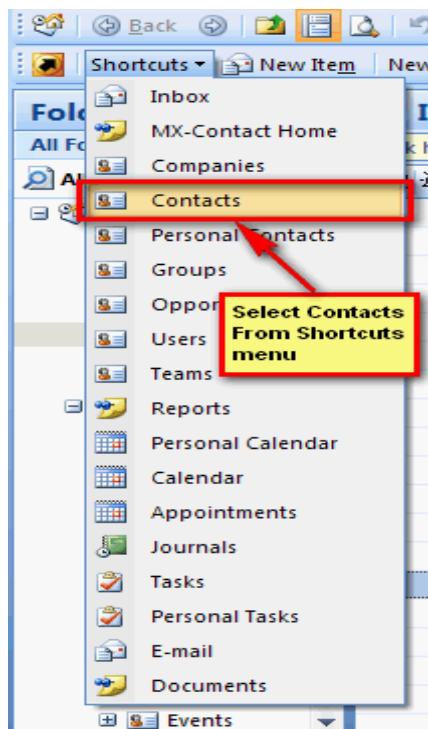
You want to send Barney Anderson a follow up e-mail regarding the proposal that you sent a few days ago and link it to the opportunity "Upgrade Network – 10 Computers".

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

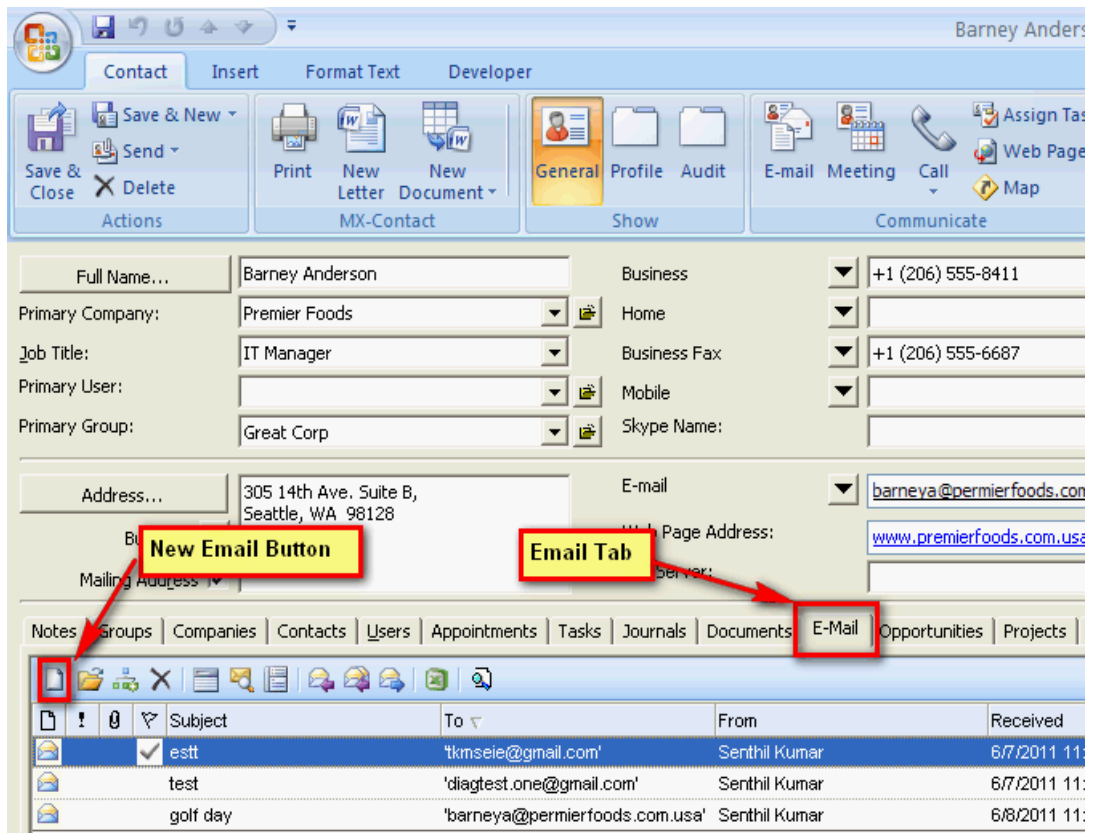
To:	barneya@premierfoods.com.usa (appears automatically)
Subject:	Follow up on Proposal
Memo:	<p>Hi Barney</p> <p>Just a quick note to check that you received the proposal sent a few days ago. Please feel free to contact me if you have any queries.</p> <p>Kind Regards Susan Jones</p>

Basic Steps:

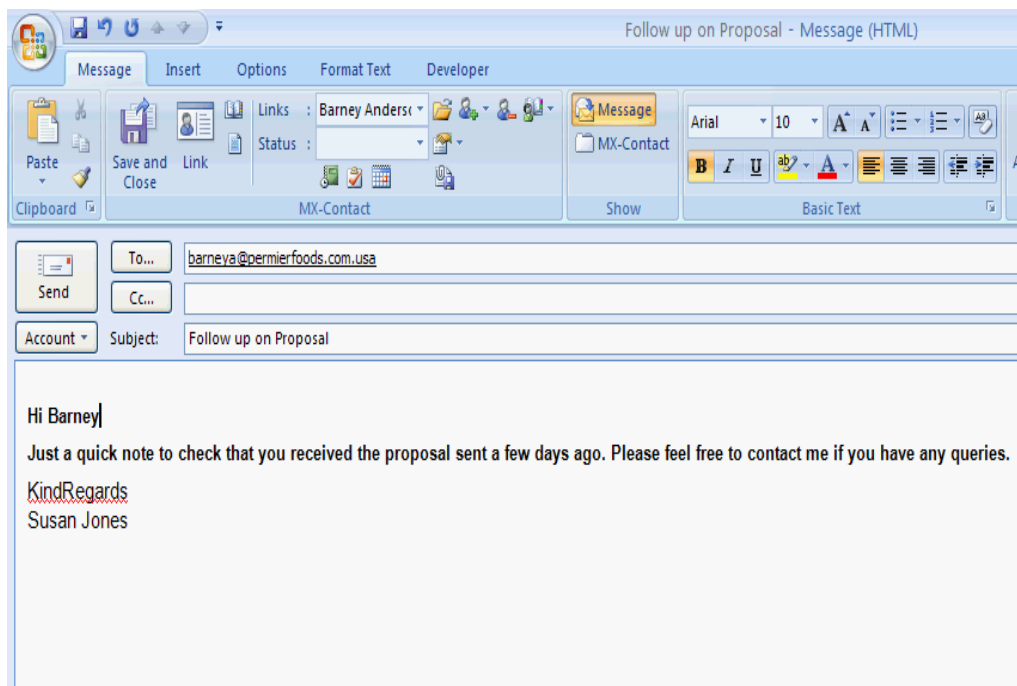
1. Select the **Contacts** Shortcut from the **Shortcuts Menu** on the **MX-Contact Toolbar**:



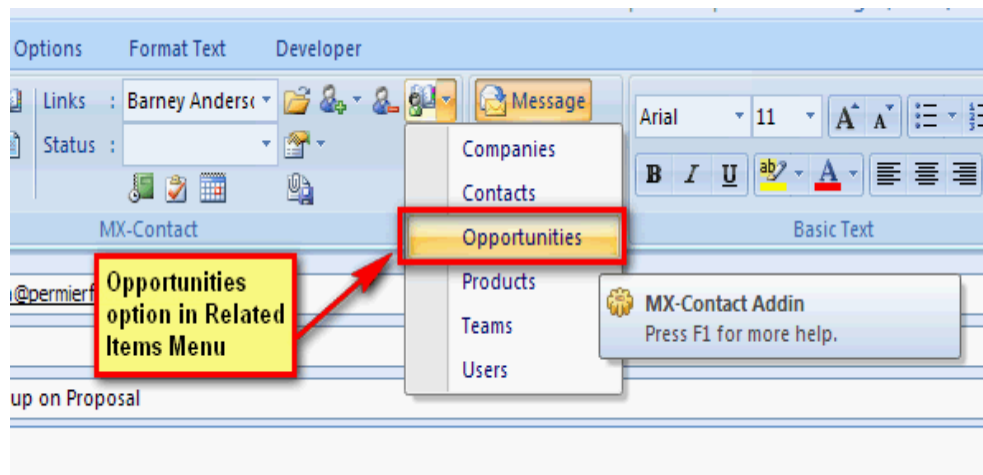
2. Open **Barney Anderson's** Contact Record.
3. Click on the **E-mail Tab**.
4. Click on **New (E-Mail) button**.



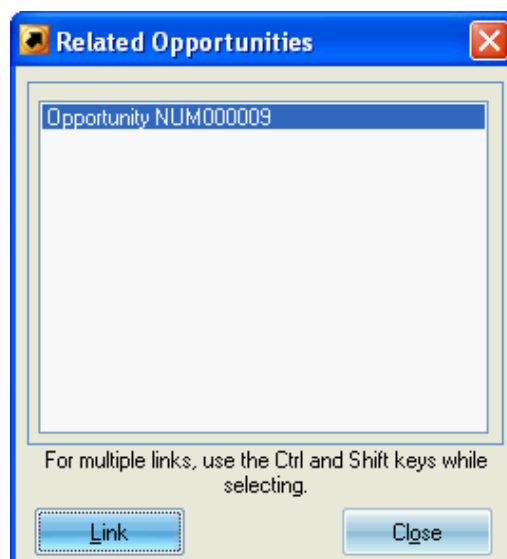
5. Enter the details shown above:



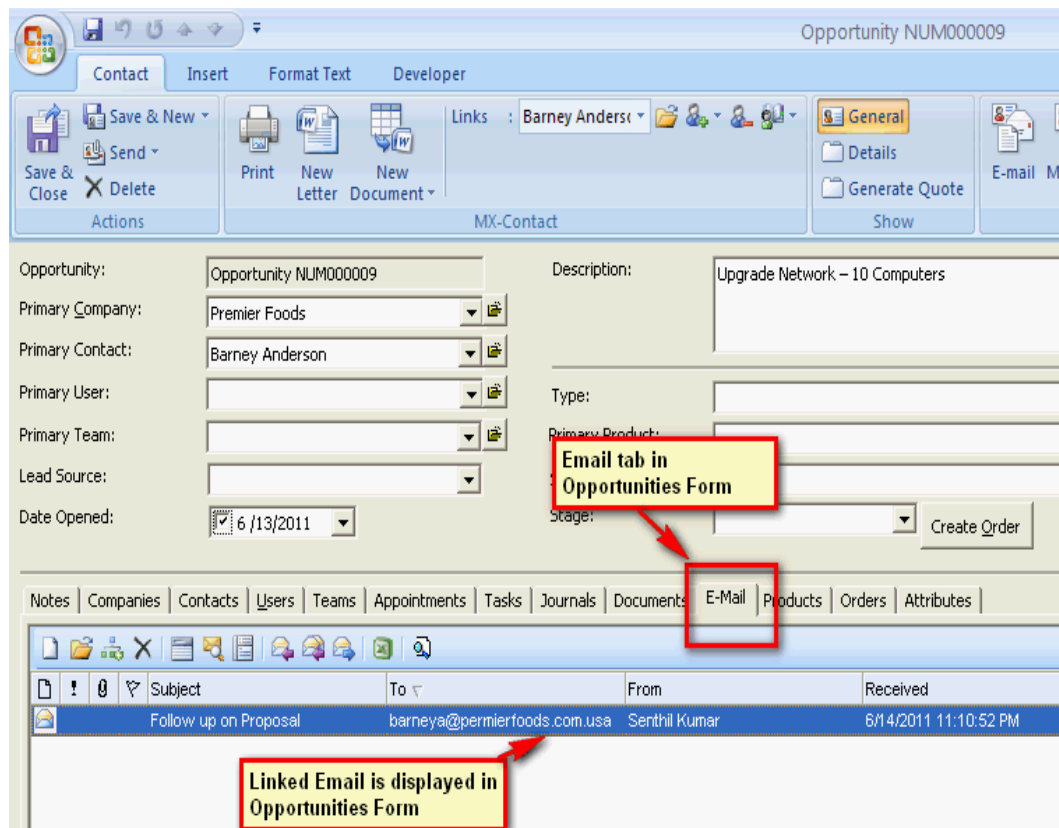
6. To link this E-Mail to the opportunity "Upgrade Network – 10 Computers", Click on **Opportunities** option in **Related Items** Menu.



7. It will open Related opportunities window. In which select the opportunity and click Link Button.



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

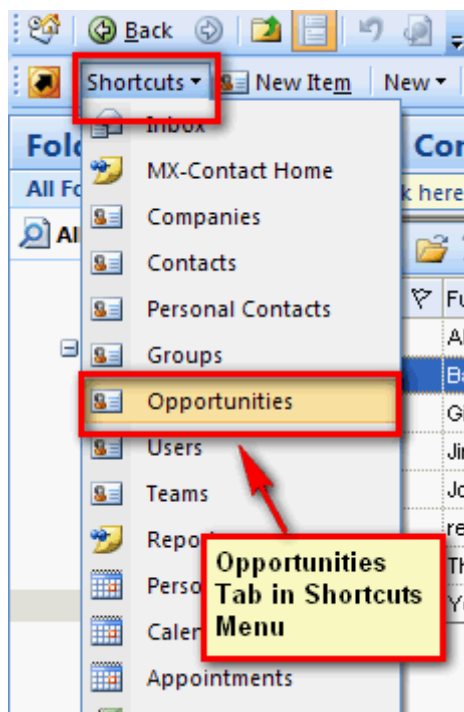
You have prepared a proposal for Barney and want to generate a Fax Cover Sheet for this proposal from the opportunity folder so that it links automatically to the relevant opportunity.

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

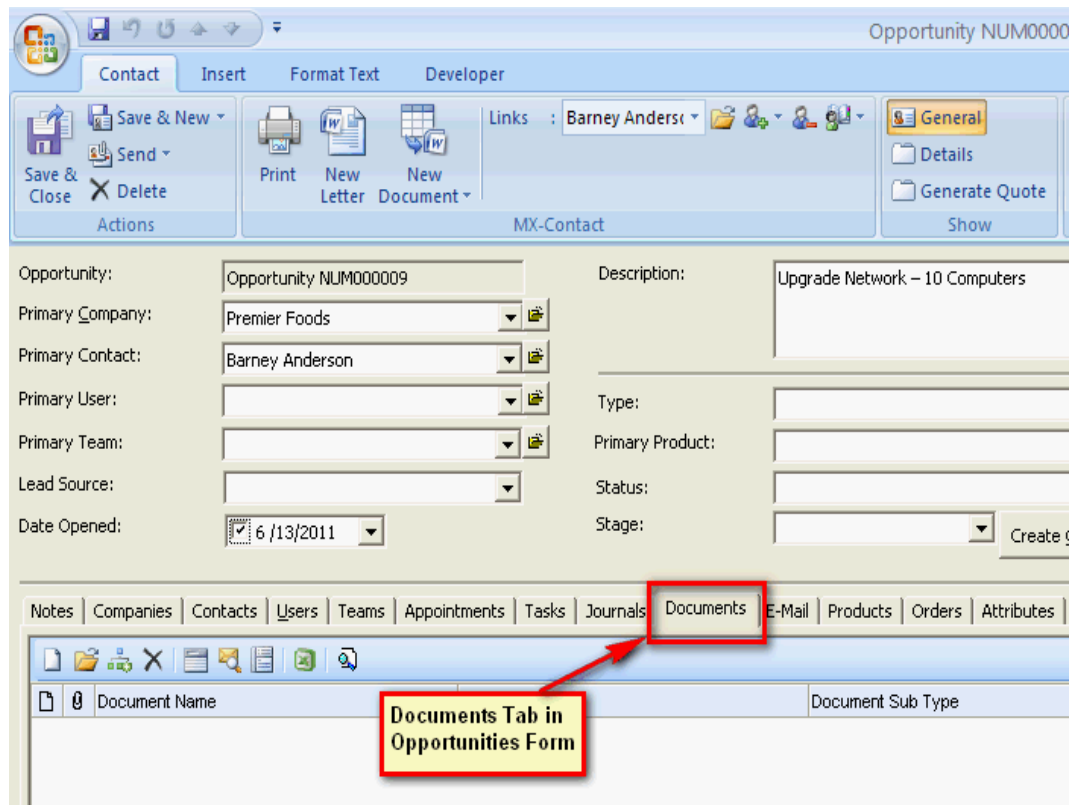
Templates Location:	Outlook/Exchange Folder
Templates Folder:	Templates
Template Name:	Contemporary Fax Contact
Document Name:	Barney Anderson Fax Cover.doc
Document Location:	Outlook/Exchange Folder
Document Folder:	Blank (disabled)
Insert as:	Attachment

Basic Steps:

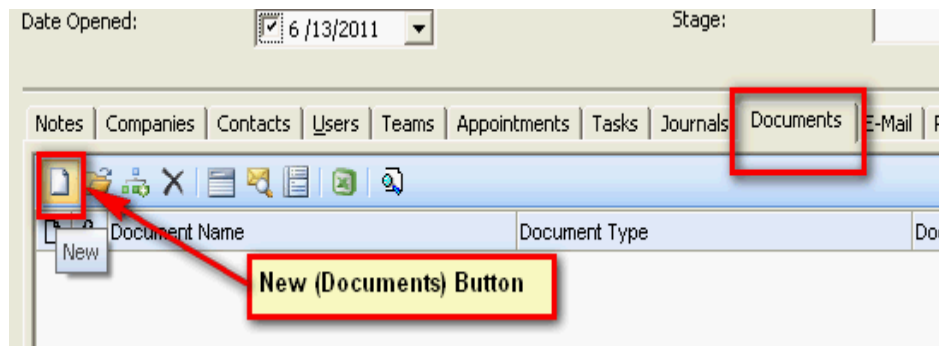
1. Select the **Opportunities** Shortcut from the **Shortcuts Menu** on the **MX-Contact Toolbar**:



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



4. Click on **New Document**:



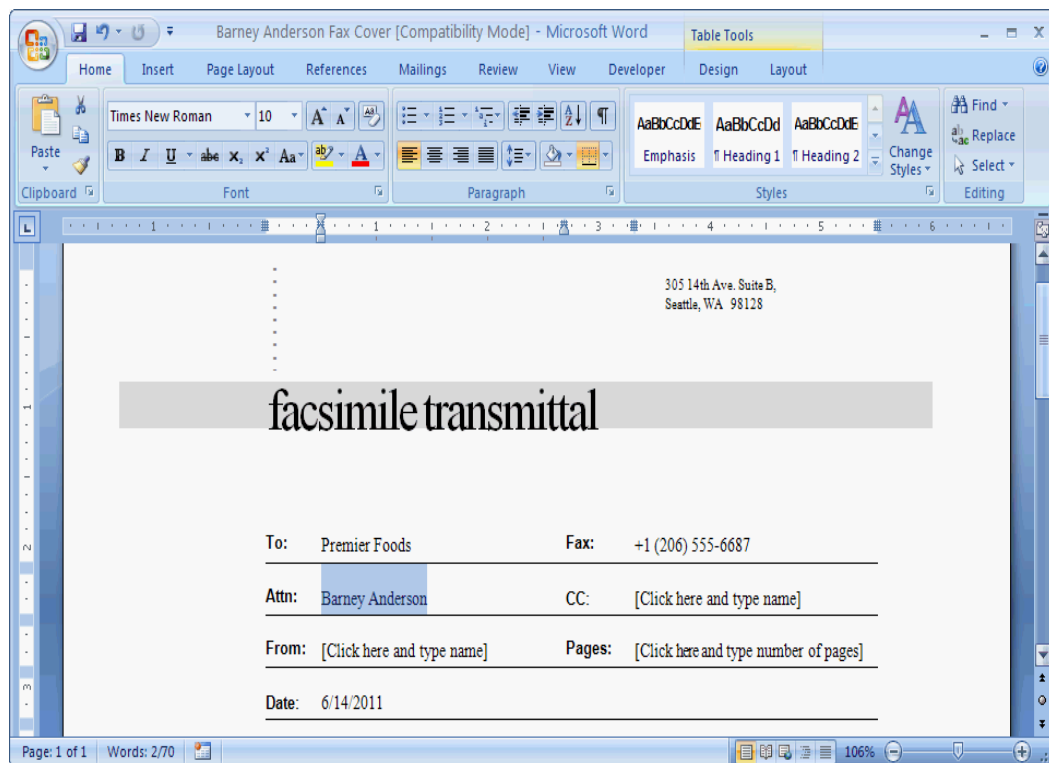
5. Click on the **Create New Document** Tab, and enter the details shown above:

The screenshot shows the Microsoft Word ribbon with the 'Create New Document' tab highlighted. Below the ribbon is the 'Document Properties' dialog box. The dialog box has the following fields and options:

- Templates Location: Outlook/Exchange Folder Windows File System
- Templates Folder:
- Template Name:
- Document Name:
- Document Location: Outlook/Exchange Folder Windows File System
- Document Folder:
- Insert As: Attachment Shortcut
- OK button

A red arrow points from a yellow box labeled 'Create New Document Tab' to the 'Create New Document' tab in the ribbon.

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 **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".

The screenshot displays the MX-Contact Opportunities form for Opportunity NUM000001. The form includes fields for Opportunity, Primary Company (Premier Foods), Primary Contact (Barney Anderson), Primary User, Primary Team, Lead Source, Date Opened (6/23/2011), Description (Network Upgrades - 10 Comput), Type (Opportunity Type 1), and Primary Product (Open). A red box highlights the 'Documents Tab' in the navigation bar. Below the navigation bar, a table lists document records:

Document Name	Document Type	Document Sub Type
Barney Anderson Fax Cover.doc		

A red box highlights the document record, with an arrow pointing to it from a text box stating: "Document record is added in the Opportunities Form".

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

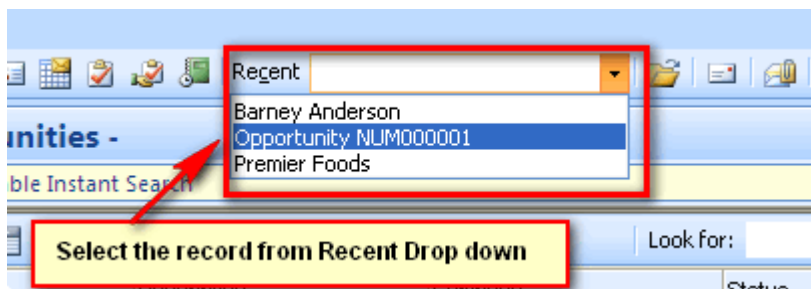
Create a Task from an opportunity to do a proposal for **Barney Anderson of Premier Foods**.

Complete the following information on the Task:

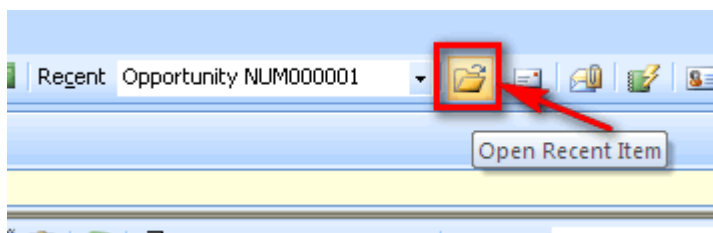
Opportunity:	Network Upgrade – 10 Computers
Subject:	Fax proposal to Barney
Due Date:	The following Thursday
Regarding:	Present/Review Proposal
Category:	Sales - Prospect

Basic Steps:

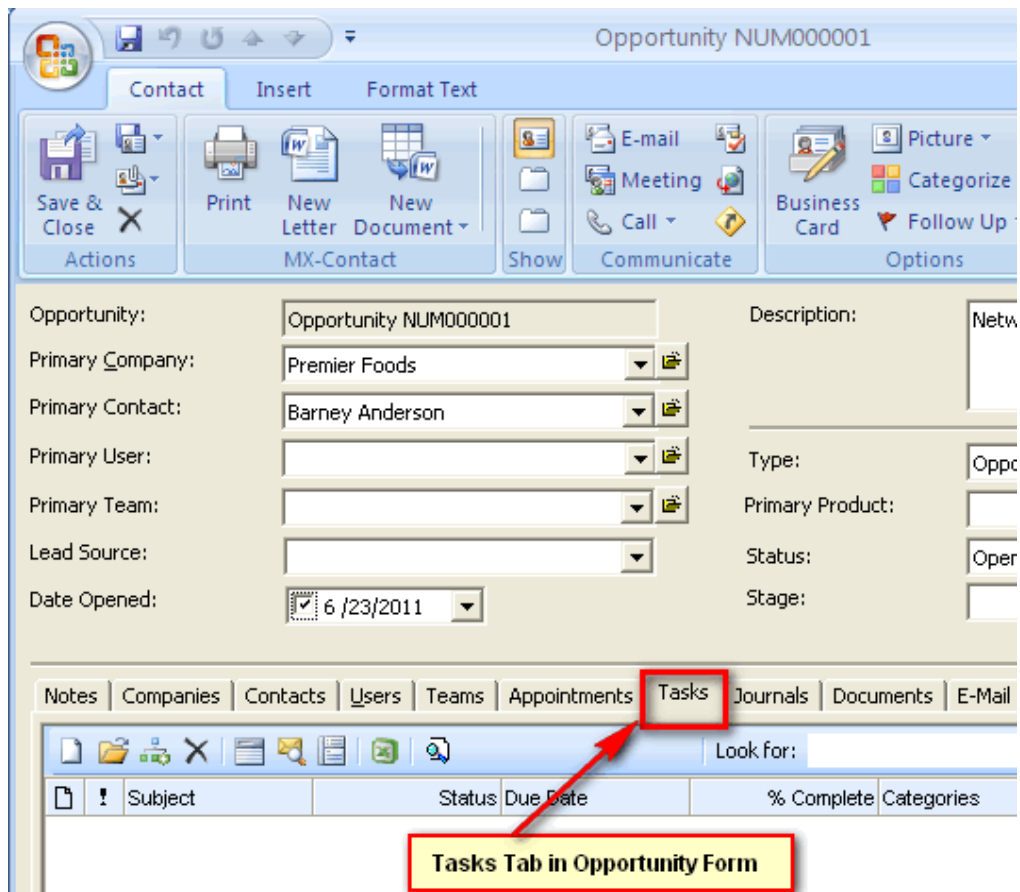
1. Open the opportunity “Opportunity 1000002” (try this from Recent Items). Click on the **Recent Items** drop down list and select “Upgrade Network – 10 Computers”.



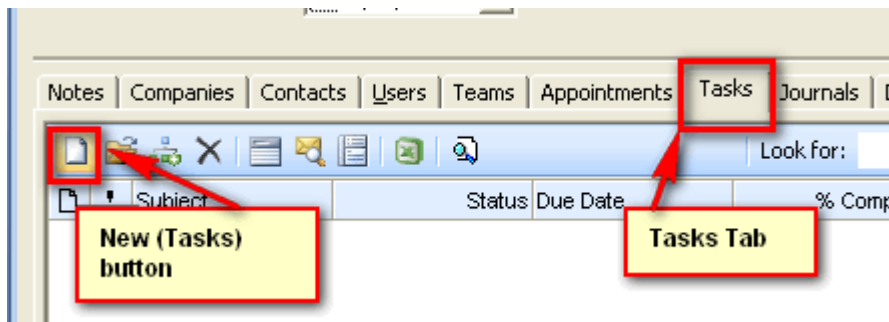
2. Click on the **Open Recent Item** button.



3. Once the Opportunity form has opened, click on the **Tasks Tab**.



4. Click on **New Task**.



5. Enter the Task Details:

Fax proposal to Barney - Task

Task Insert Format Text

Save & Close Delete

Links : Barney Anders

Status :

Assign Task Send Status Report Mark Complete

Due in 6 days.

Subject: Fax proposal to Barney

Start date: Thu 6/30/2011 Status: Not Started

Due date: Thu 6/30/2011 Priority: Normal % Complete: 0%

Reminder: None None Owner: Senthil Kumar

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”:

Date Opened: 6/23/2011 Stage:

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

Subject	Status	Due Date	% Complete	Categories
Fax proposal to B...		6/30/2011 12:00:00	%	

In Tasks Tab the created Task Record is displayed

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.

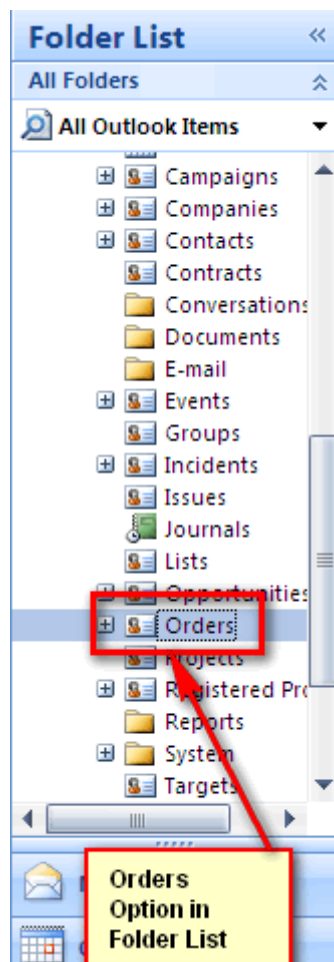
Description:	HP Pavilion Notebook
Reference:	PRE12345
Order Date:	Today's Date
Shipped Date:	Today's Date
Invoice No:	INV12345
Invoice Date:	Today's Date
Ship Via:	Fedex
Freight	\$65.00

Line Items:

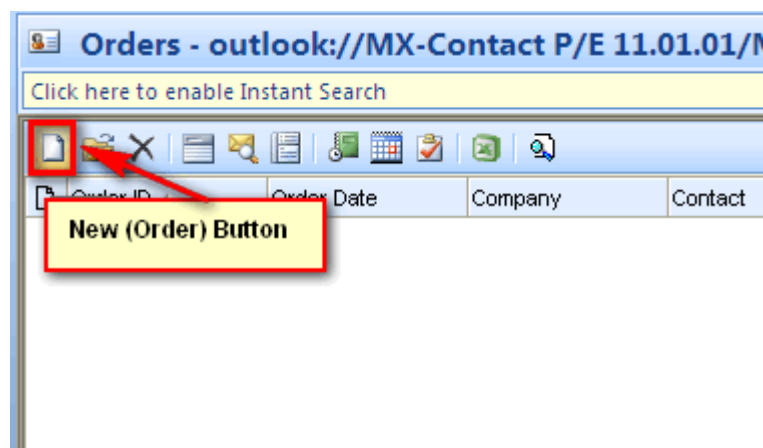
Product Code:	Zv5022AP
Description:	HP Pavilion Notebook
Quantity:	1
Unit Price:	\$2,025.00

Basic Steps:

1. Select the **Orders Folder** from the **MX-Contact Folder List**.



2. Click on the **New (Order)** button:



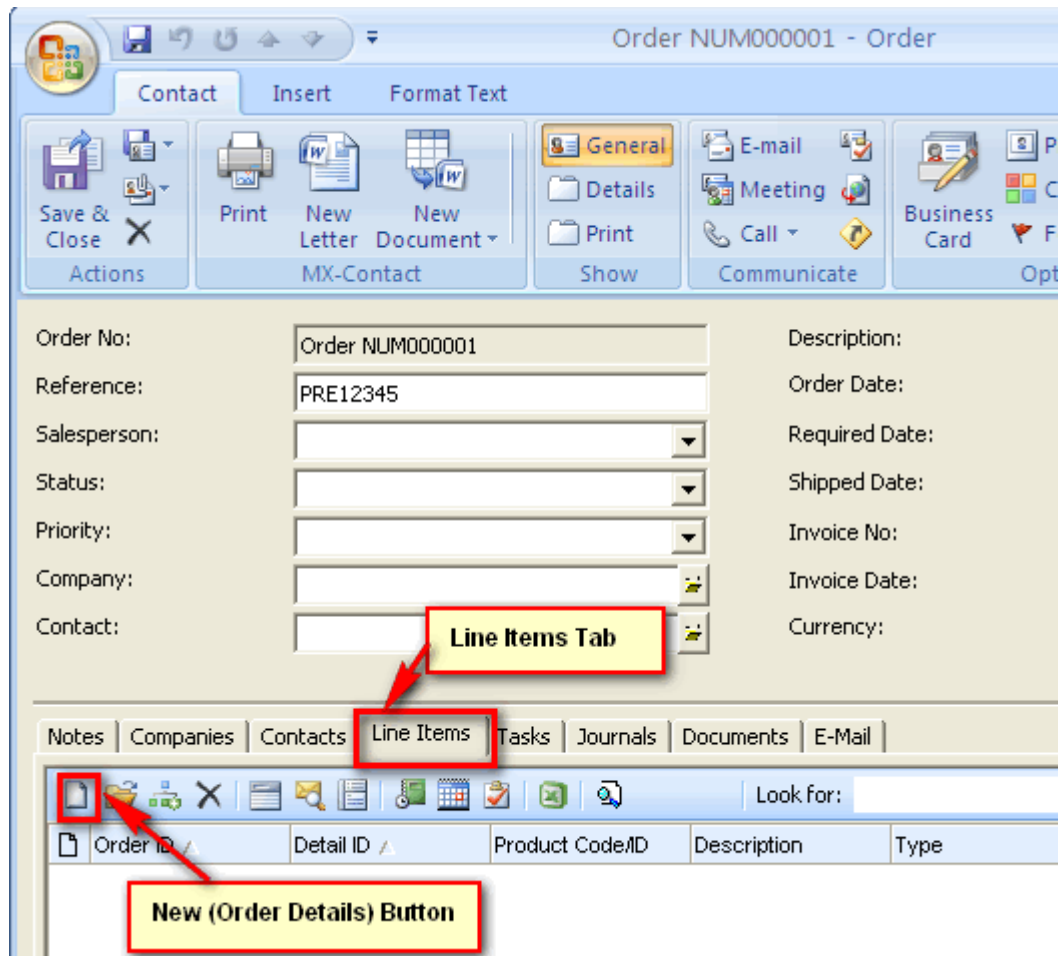
3. A blank **Orders** form will appear:

The screenshot shows the MX-Contact software interface for creating a new order. The window title is "Order NUM000001 - Order". The ribbon includes "Order", "Insert", and "Format Text" tabs. The "Order" tab is active, showing toolbars for "Actions", "MX-Contact", "General", "Communicate", "Options", and "Proofing". The main form contains fields for Order No., Reference, Salesperson, Status, Priority, Company, Contact, Description, Order Date, Required Date, Shipped Date, Invoice No., Invoice Date, and Currency. A yellow callout box labeled "New Orders Form" is positioned over the "New Orders" tab in the bottom navigation bar.

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

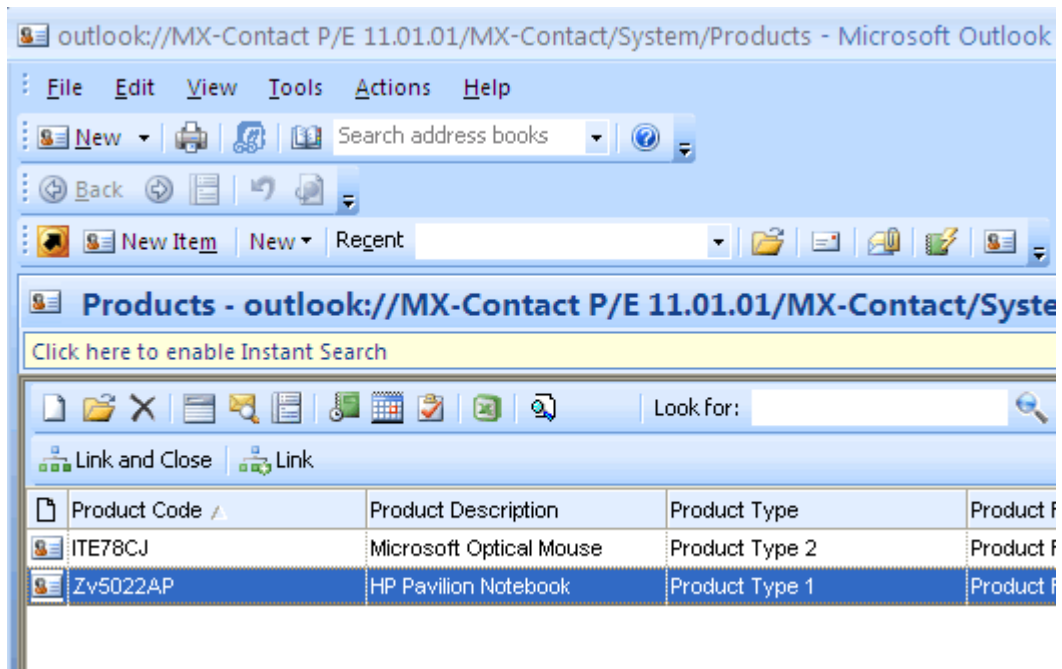
- To add products to this order, click on the **Line Items** tab. Select the **New Order Detail** button.



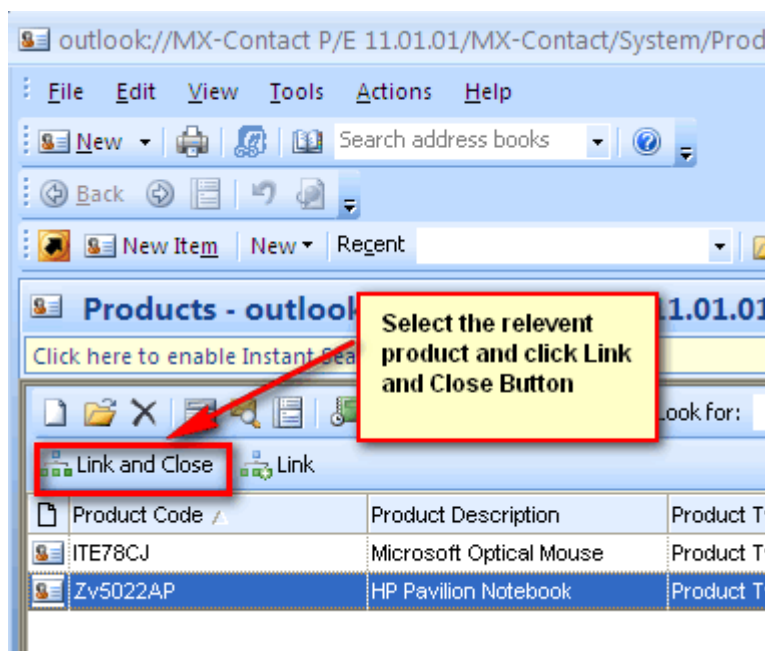
- The following screen will appear:

7. Click on the **Open Folder** button attached to the **Product Code** field.

8. The **Product Register** will appear.



9. Select the relevant Product and then click on the **Link and Close** button.



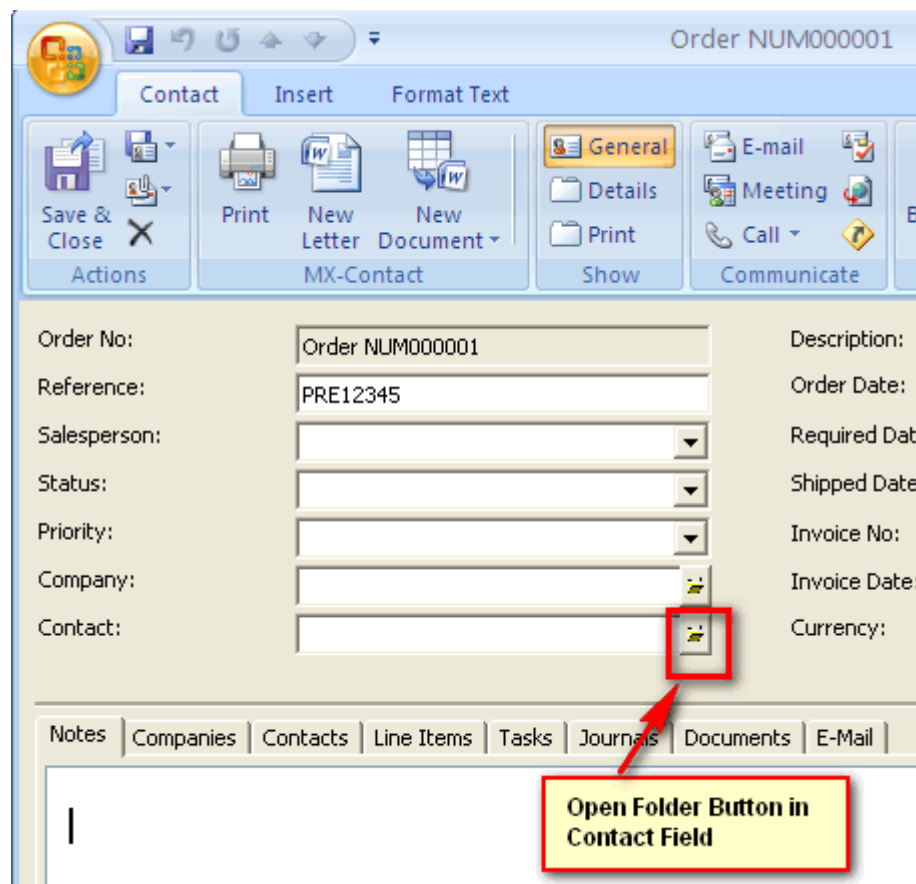
10. Enter all the remaining details.

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

11. Click on **Save and Close**. Repeat this process until all the required products have been added.
12. 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**.

The screenshot displays the MX-Contact software interface for Order NUM000001. The interface includes a ribbon menu with tabs for 'Contact', 'Insert', and 'Format Text'. Below the ribbon are several groups of buttons: 'Actions' (Save & Close), 'MX-Contact' (Print, New Letter, New Document), 'Show' (General, Details, Print), 'Communicate' (E-mail, Meeting, Call), and 'Options' (Picture, Categorize, Business Card, Follow Up). The main form area contains fields for Order No., Reference, Salesperson, Status, Priority, Company, and Contact, along with corresponding fields for Description, Order Date, Required Date, Shipped Date, Invoice No., Invoice Date, and Currency. A red box highlights the 'Open Folder' button (represented by a folder icon) located to the right of the 'Company' field. A red arrow points from this button to a yellow callout box that contains the text 'Open Folder Button in Company Field'. At the bottom of the form, there are tabs for 'Notes', 'Companies', 'Contacts', 'Line Items', 'Tasks', 'Journals', and 'Documents'.

13. 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**.



14. 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:

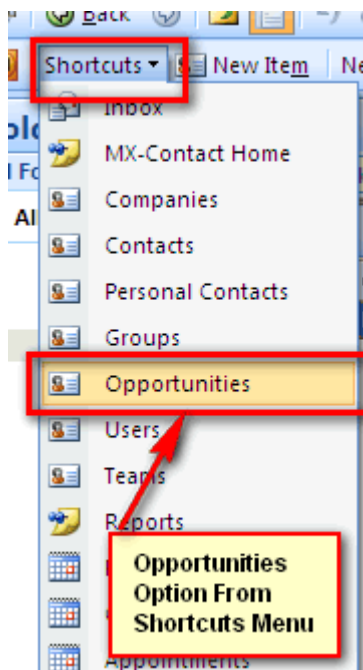
Company:	Premier Foods
Description:	5 new computers - Sales Department
Order Date:	14/07/2005

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**



- Then click on the “5 New Computers for Sales Department” opportunity for Premier Foods to open the **Opportunity record**. The following screen will appear:

The screenshot shows the 'Opportunity NUM000002' record form. The form includes fields for Opportunity, Primary Company (Premier Foods), Primary Contact, Primary User, Primary Team, Lead Source (Lead Source 1), Date Opened (7/6/2011), Description (5 new computers - Sales Department), Type, Primary Product, Status (Open), and Stage. A 'Create Order' button is visible at the bottom right of the form. A yellow box with a red border highlights the 'Opportunities Form' text in the center of the screen.

- Click on the **Create Order** button.

This close-up view shows the 'Create Order' button, which is highlighted with a red box. A red arrow points from the button to a yellow box with a red border containing the text 'Create Order Button in Opportunity Form'. The background shows the 'Status' field set to 'Open' and the 'Stage' field.

- An **Order Form** will open transferring all the information found in the Opportunity to the **Order screen**.
- 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.
- 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).

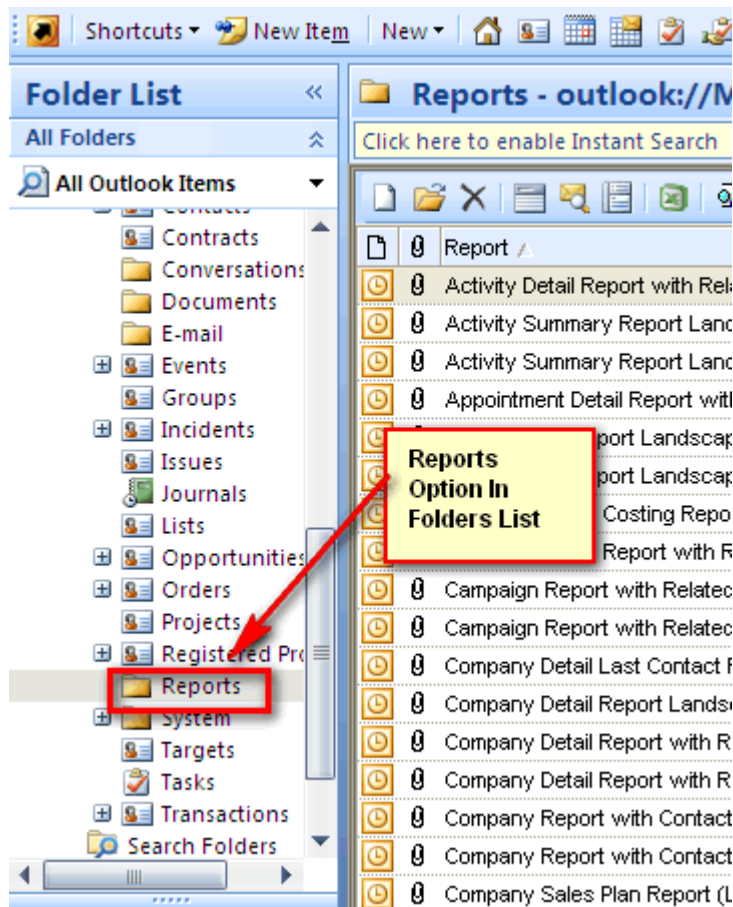
Show me the **Solution** ([Running an Orders Report: Solution](#))

4.6 Running an Orders Report: Solution

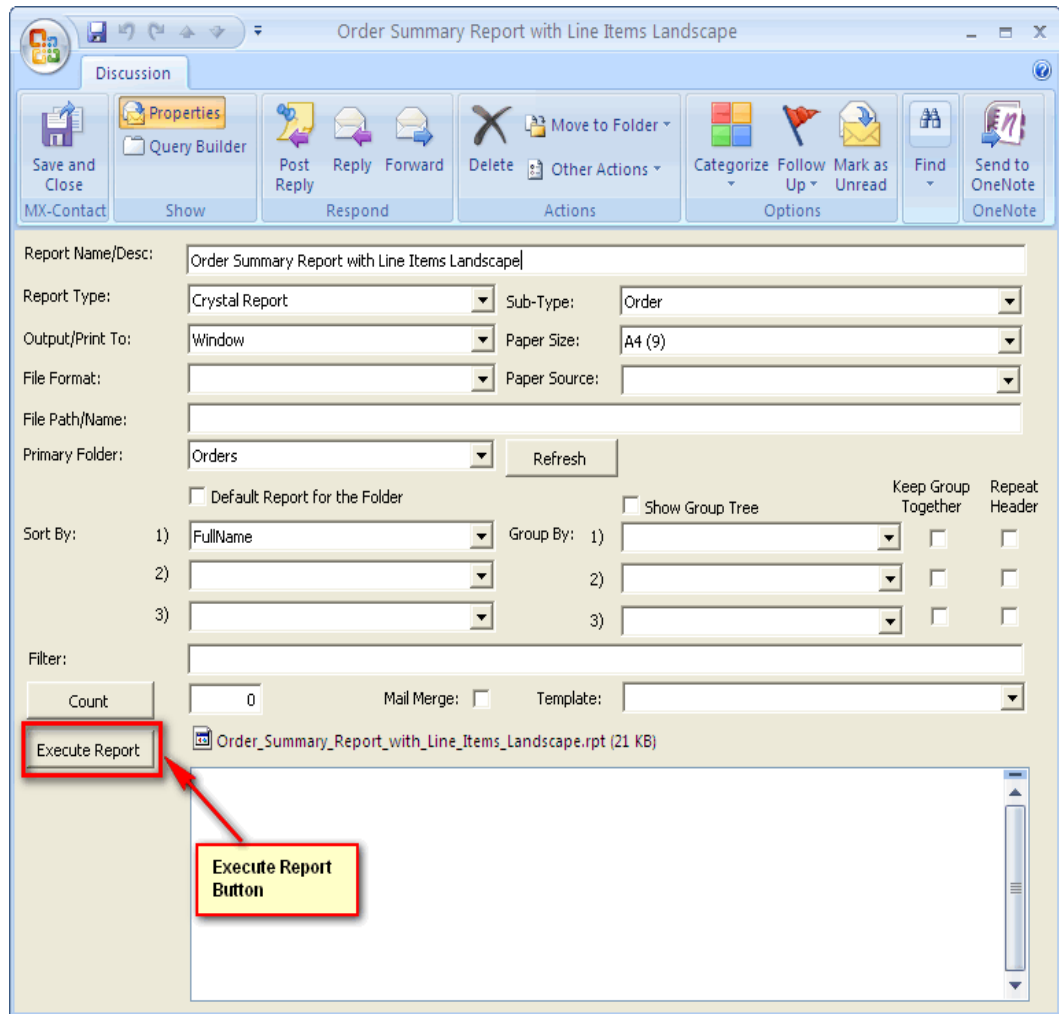
Run an Orders Report with Line Items (Landscape).

Basic Steps:

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



2. Select and double click on the **Order Summary Report with Line Items Landscape**.The following window will appear.



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

The screenshot shows a window titled 'MX-Contact Crystal Reporting' with a BusinessObjects logo. The report is titled 'Orders Report with Line Items' and is sorted by 'FullName'. The report displays two orders with their respective line items.

Order ID	Reference	Company	Salesperson	Status
Order Date	Description	Contact		Priority
Order NUM000001	PRE12345	Premier Foods		
6/24/2011	HP Pavilion Notebook	Barny Anderson		
Detail ID	Description	Product Type	Quantity	
Line 00001	HP Pavilion Notebook	Product Type 1		
Order ID	Reference	Company	Salesperson	Status
Order Date	Description	Contact		Priority
Order NUM000003		Premier Foods		
6/24/2011				
Detail ID	Description	Product Type	Quantity	

- 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”.

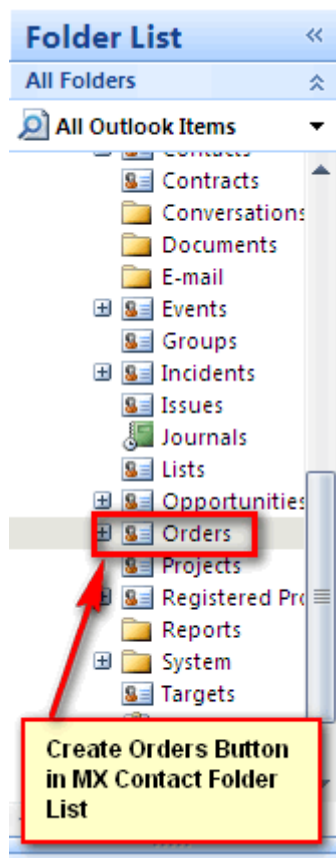
Show me the **Solution** ([Running an Orders Report – Single Order: Solution](#))

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.

Order NUM000001

Contact Insert Format Text

Save & Close X Print New Letter Document MX-Contact General Details Print Show E-mail Meeting Call Communicate Picture Categorize Business Card Follow Up Options Spelling Proofing

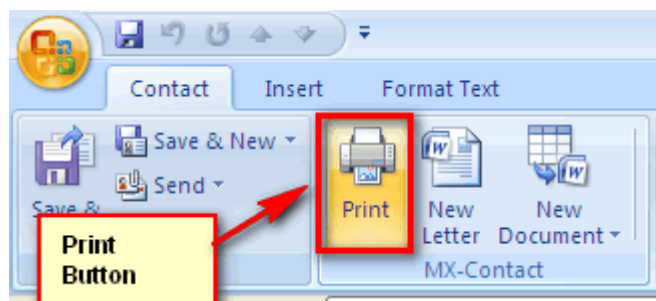
Order No: Order NUM000001 Description: HP Pavilion Notebook
 Reference: PRE12345 Order Date: 6/24/2011
 Salesperson: Required Date: 6/24/2011
 Status: Shipped Date: 6/24/2011
 Priority: Invoice No: INW12345
 Company: Premier Foods Invoice Date: 6/24/2011
 Contact: Barney Anderson Currency:

Notes Companies Contacts Line Items Tasks Journals Documents E-Mail

Look for: MX-Contact

Order ID	Detail ID	Product Code/ID	Description	Type	Family	Group
Order NUM000001	Line 00001	015470C0-14AE...	HP Pavilion Noteb...	Product Type 1	Product Family 1	Product

- Click on the **Print button** in **MX Contact Add in** at the top of the window.



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

MX-Contact Crystal Reporting

BusinessObjects

Sales Invoice

Invoice No: INV1234	Invoice Date: 6/24/2011
Customer No:	
Customer: Premier Foods	
Invoice Address:	Delivery Address:
Salesperson:	
Order Reference: PRE12345	

Detail ID	Product Code	Description	Quantity	Unit Price	Extended Price
Line 00001		HP Pavilion Notebook	1	\$2,015.00	\$2,015.00

Sub Total:	\$2,015.00
Sales Tax:	\$201.50
Freight:	\$65.00
Grand Total:	\$2,281.50

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:

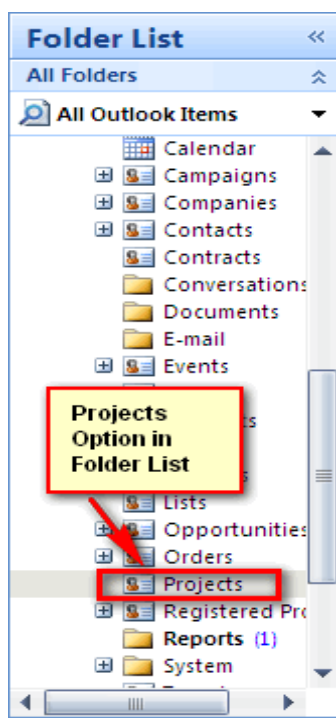
Project:	Upgrading of Computer Hardware and Infrastructure
Date Opened:	Today's Date
Company:	Premier Foods
Status:	Out for Bid

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

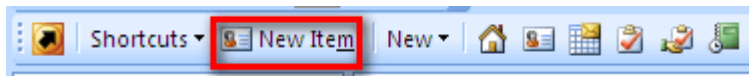
Probability:	75%
Expected Value:	\$380,000
Quote Reference:	20050702RT12

Basic Steps:

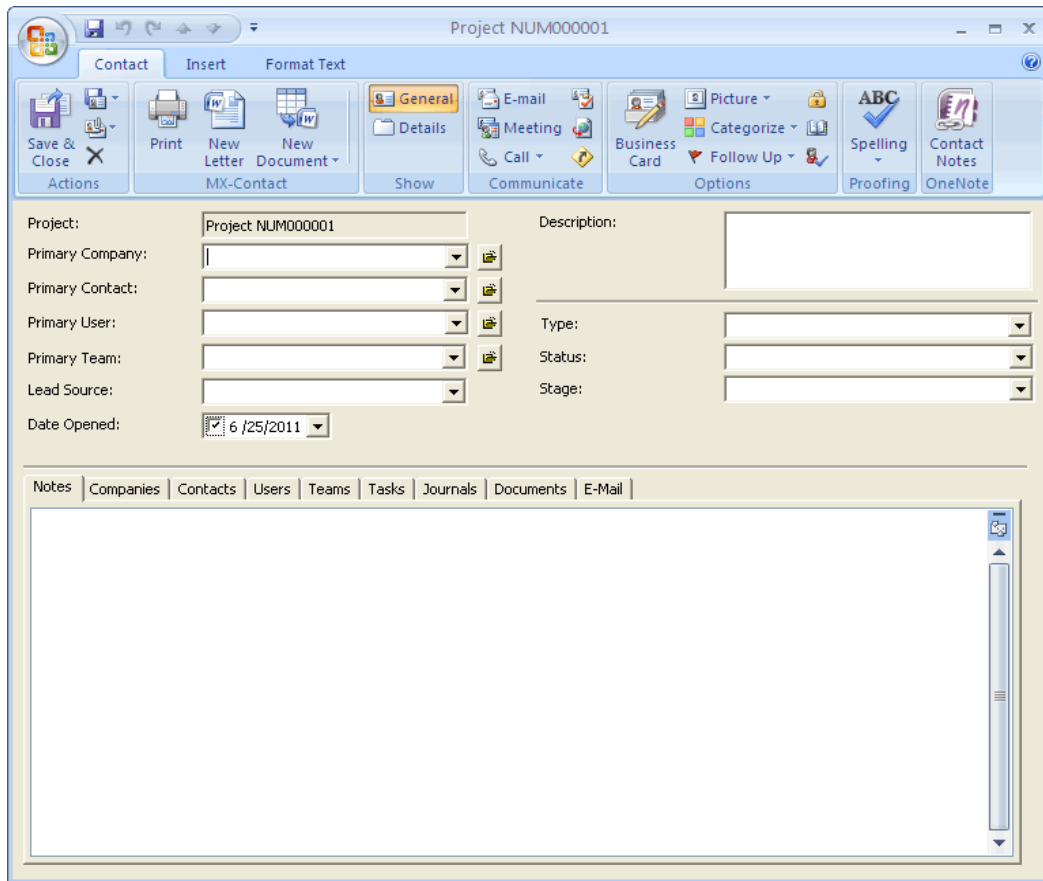
1. Select the **Projects** folder from the **Outlook Folder List**:



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



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

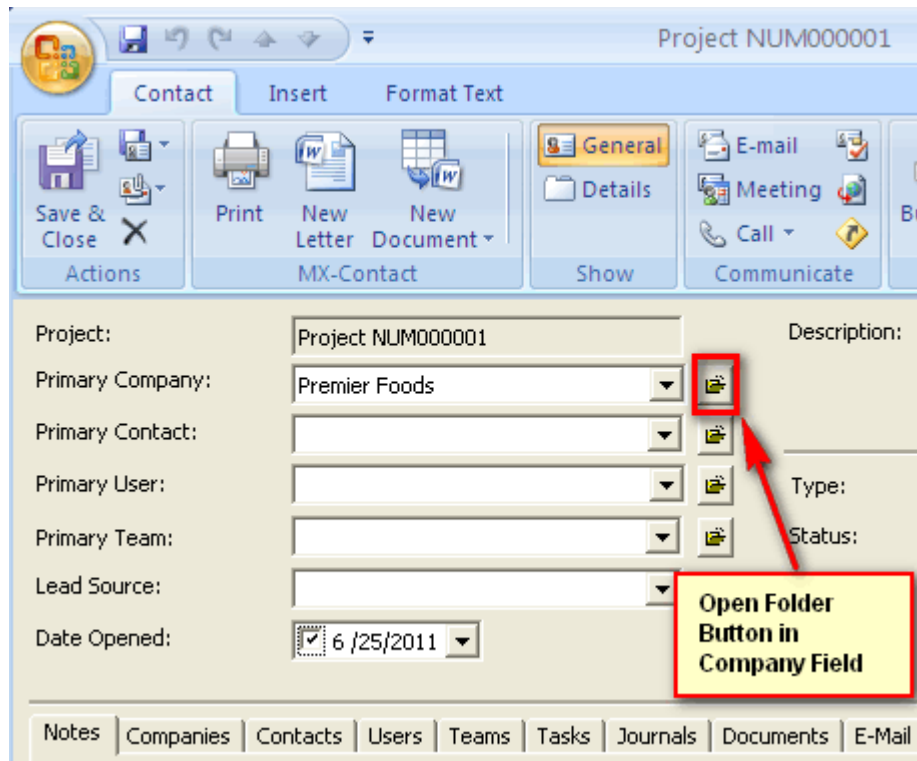


4. In the **New Project** form, add the details for the Project.

Complete the following information on the General Tab:

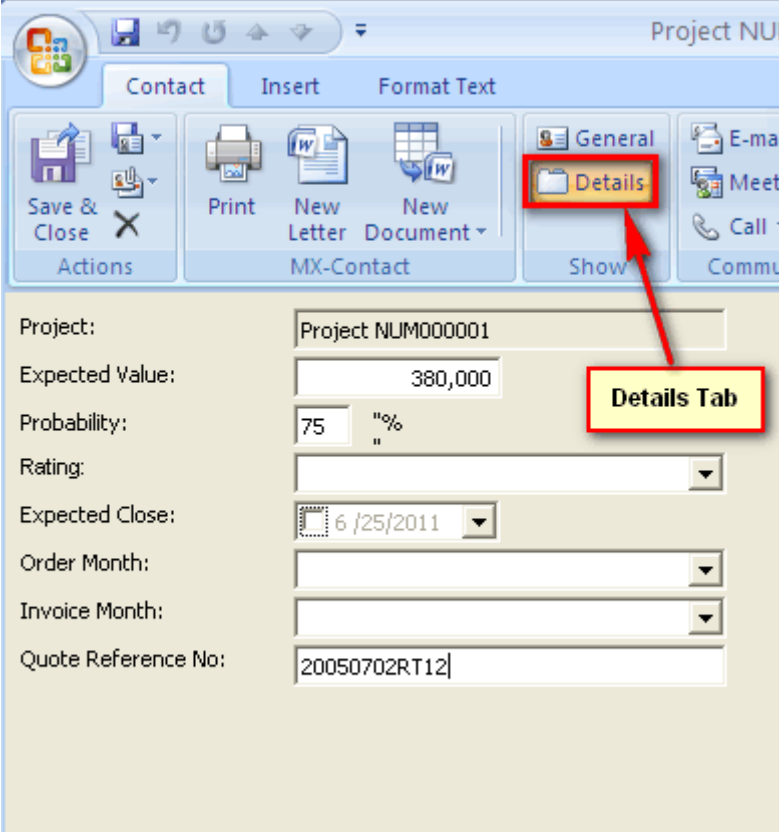
Description:	Upgrading of Computer Hardware and Infrastructure
Date Opened:	Today's Date
Company:	Premier Foods
Status:	Out for Bid

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



The screenshot shows the MX-Contact software interface. The ribbon at the top has tabs for 'Contact', 'Insert', and 'Format Text'. Under the 'Contact' tab, there are groups for 'Actions' (Save & Close), 'MX-Contact' (Print, New Letter, New Document), and 'Show' (General, Details). The 'Details' tab is highlighted with a red box, and a red arrow points from a yellow callout box labeled 'Details Tab' to it. Below the ribbon, the 'Details' form is visible, containing the following fields:

Project:	Project NUM000001
Expected Value:	380,000
Probability:	75 %
Rating:	
Expected Close:	6 /25/2011
Order Month:	
Invoice Month:	
Quote Reference No:	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](#))

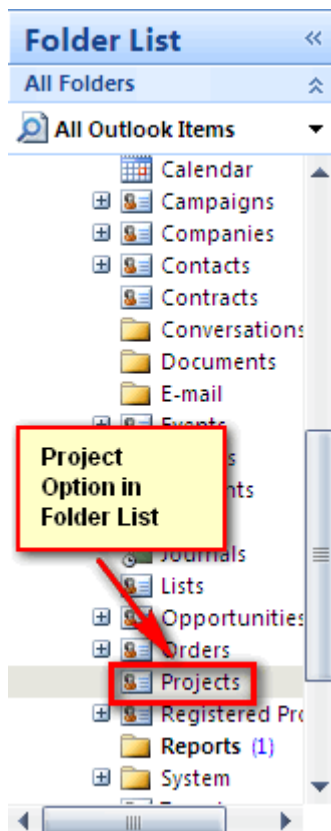
5.4 Adding a Company from a Project: Solution

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:

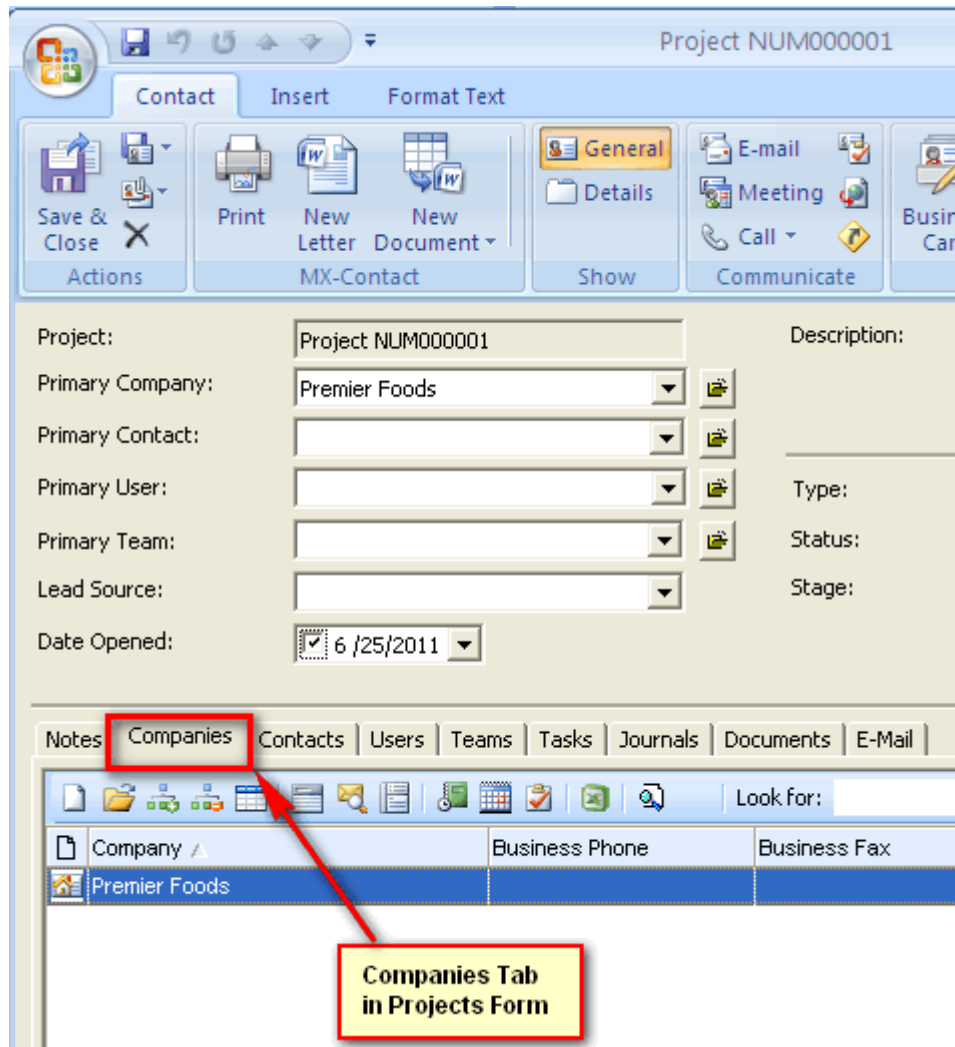
1. Select the **Projects** folder from the **Outlook Folder List**:



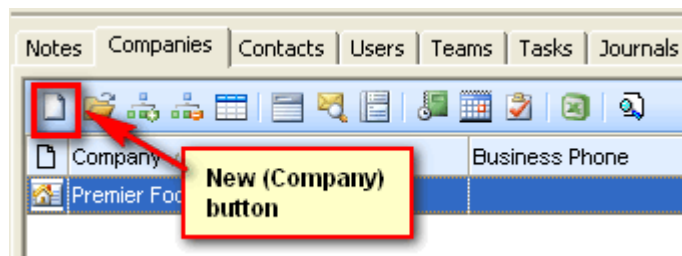
2. Open the following Project:

Project:	Project NUM000001
-----------------	--------------------------

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
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The screenshot shows the Microsoft Exchange MX-Contact form for a contact named 'Technology Integrators'. The form is displayed in a window titled 'Technology Integrators'. The ribbon at the top includes 'Contact', 'Insert', and 'Format Text' tabs. The 'Contact' tab is active, showing various options like 'Save & Close', 'Print', 'New Letter', 'New Document', 'General', 'Profile', 'Audit', 'E-mail', 'Meeting', 'Call', 'Business Card', 'Picture', 'Categorize', 'Follow Up', 'Spelling', and 'Contact Notes'. The form fields are as follows:

Company:	Technology Integrators	Business:	(206) 876-8976
Short/Other Name:	Technology Integrators	Business Fax:	
Primary User:			
Primary Group:			
Address...:	Suite 31 Westmont Office Park, 231 Newman Road, Kirkland, WA 98321, USA	E-mail:	
Business:		Web page address:	
Mailing Address:	<input checked="" type="checkbox"/>	Mail Server:	

At the bottom of the form, there is a navigation bar with tabs for 'Notes', 'Groups', 'Companies', 'Contacts', 'Lists', 'Users', 'Appointments', 'Tasks', 'Journals', 'Documents', 'E-Mail', 'Conversations', and 'Opportunities'. The 'Opportunities' tab is currently selected.

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

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

5.6 Editing a Company to Project Association: Solution

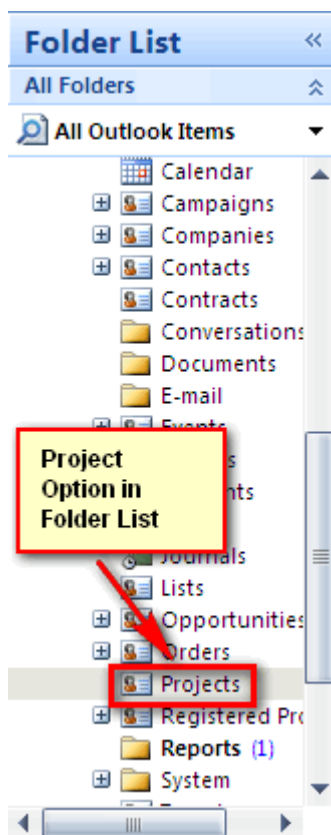
Editing a Company to Project: Association:

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

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

Basic Steps:

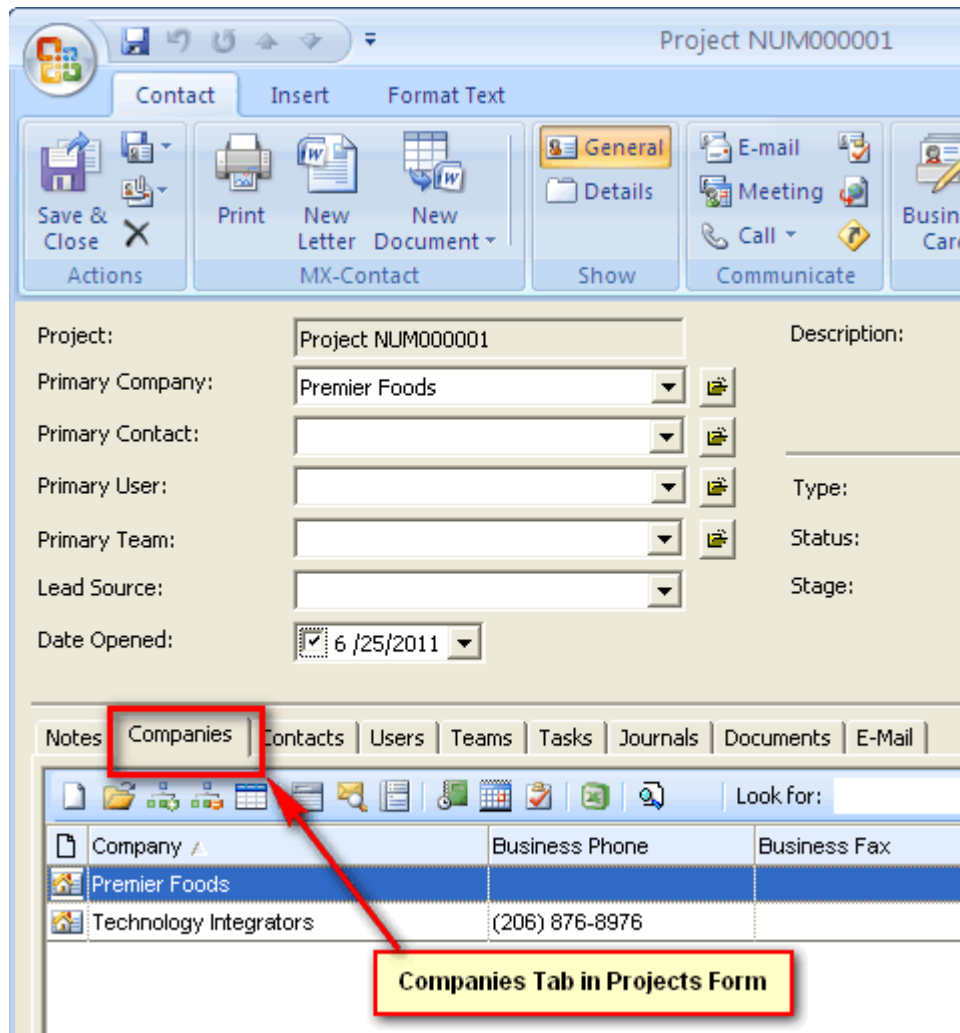
1. Select the **Projects** folder from the **Outlook Folder List**:



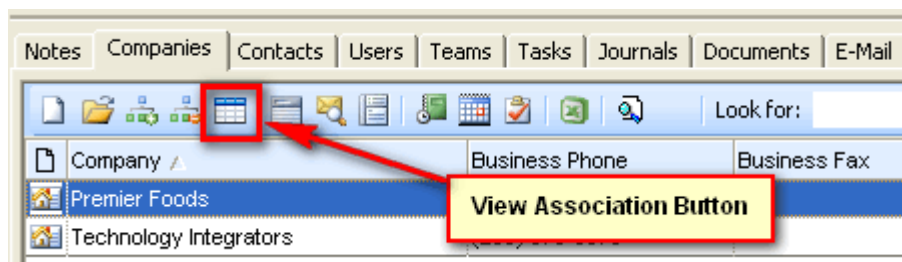
2. Open the following Project:

Project:	Project NUM000001
-----------------	--------------------------

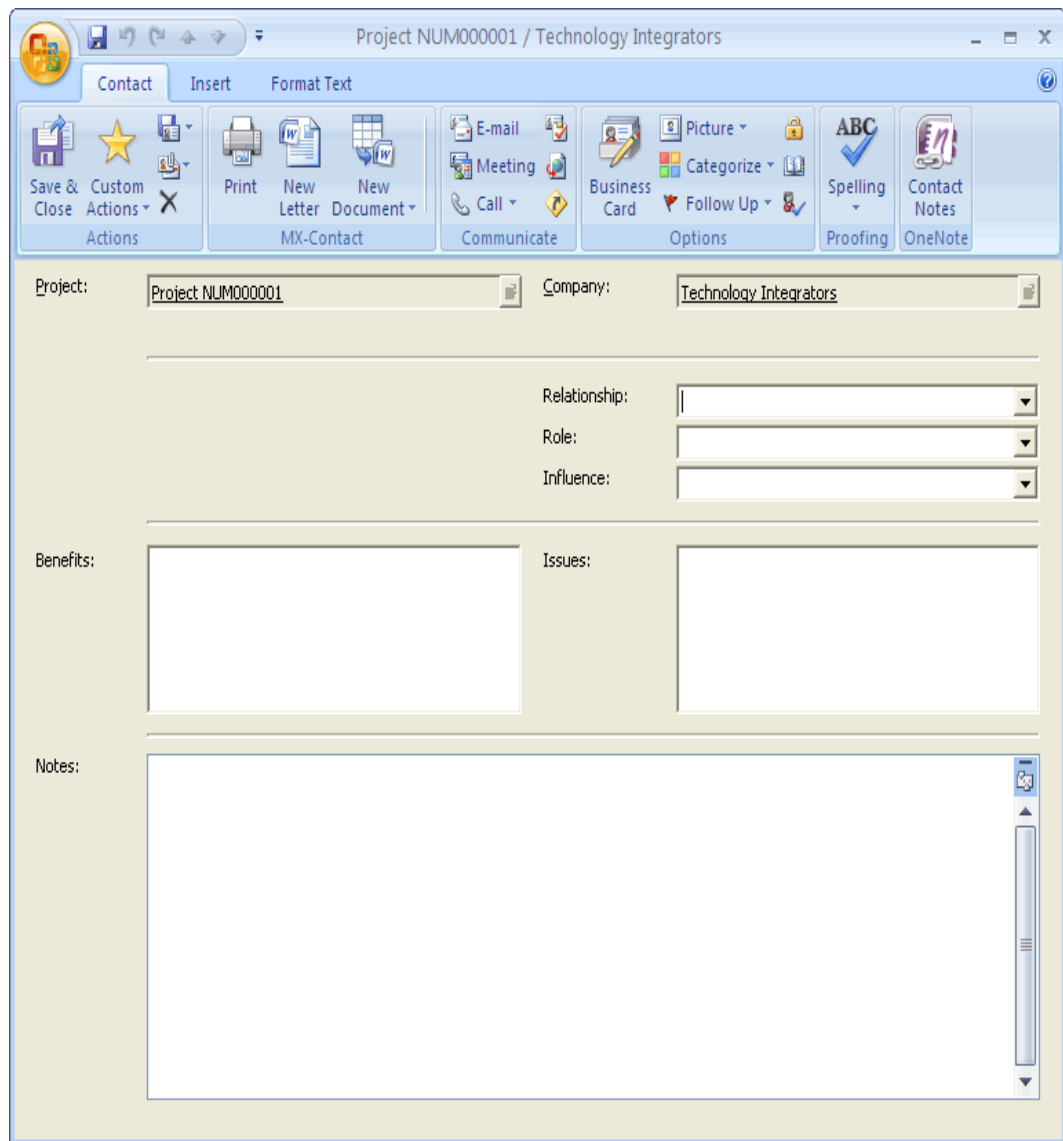
3. Click on the **Companies** Tab.



4. Click on **View Association** button. It will show the companies list in Association mode.



5. Highlight **Technology Integrators** and double click on it. A **Project to Company Association** Screen will appear. Type **Contractor** into the **Relationship** field.



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](#))

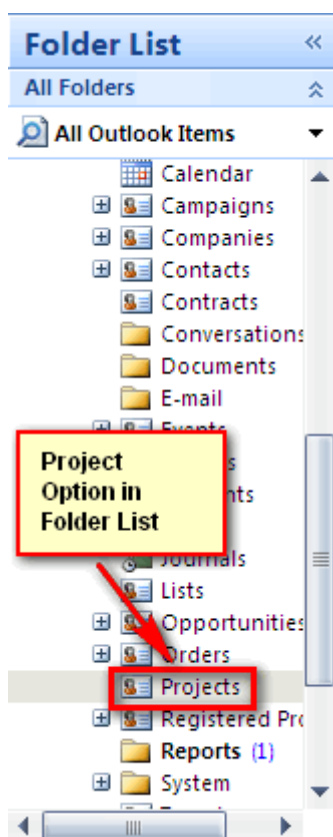
5.8 Attaching a Document to a Project: Solution

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:

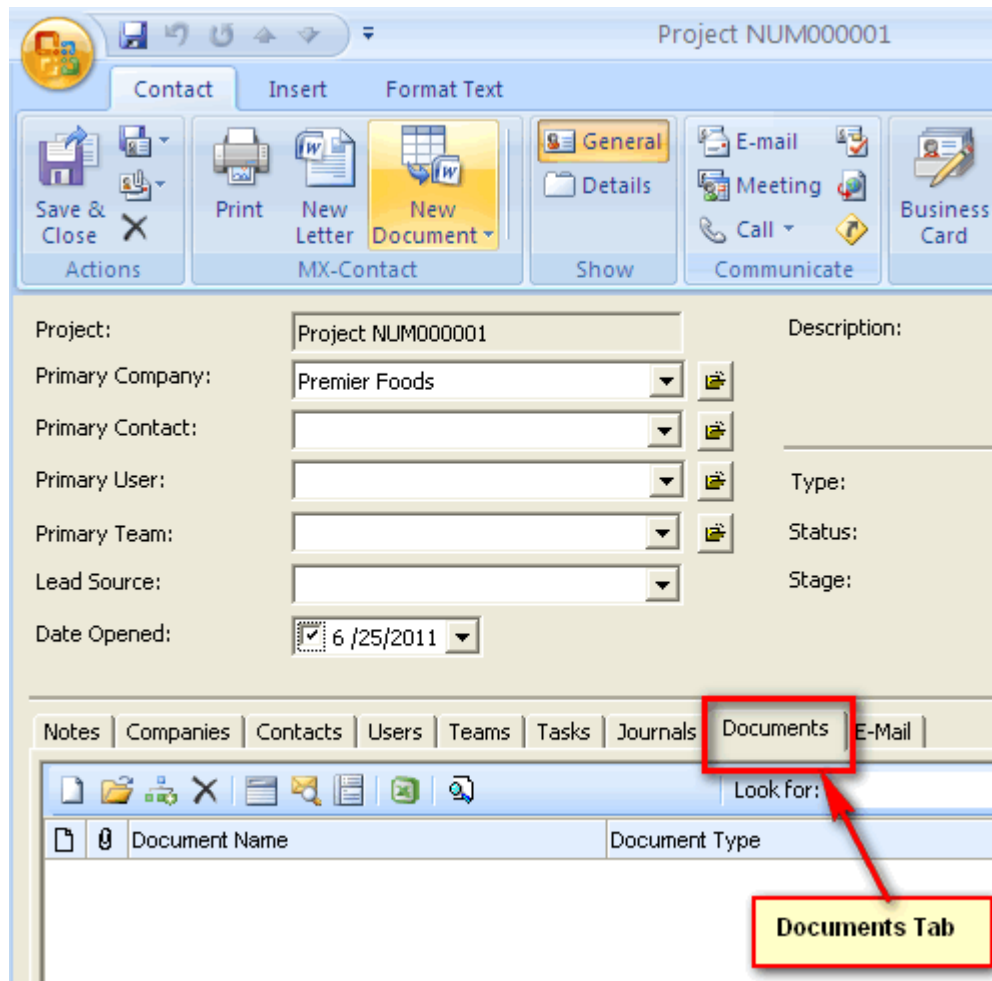
1. Select the **Projects** folder from the **Outlook** Folder List:



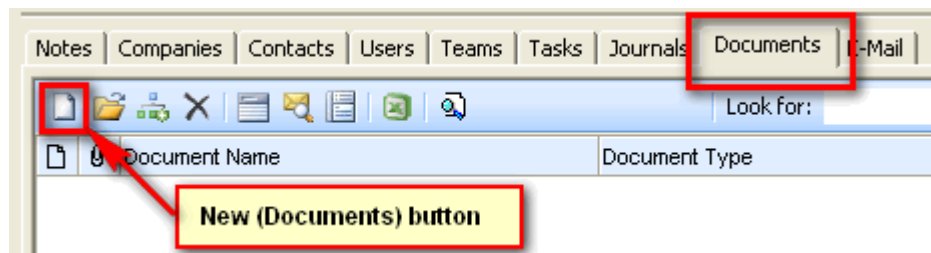
2. Open the following Project:

Project:	Project NUM000001
-----------------	--------------------------

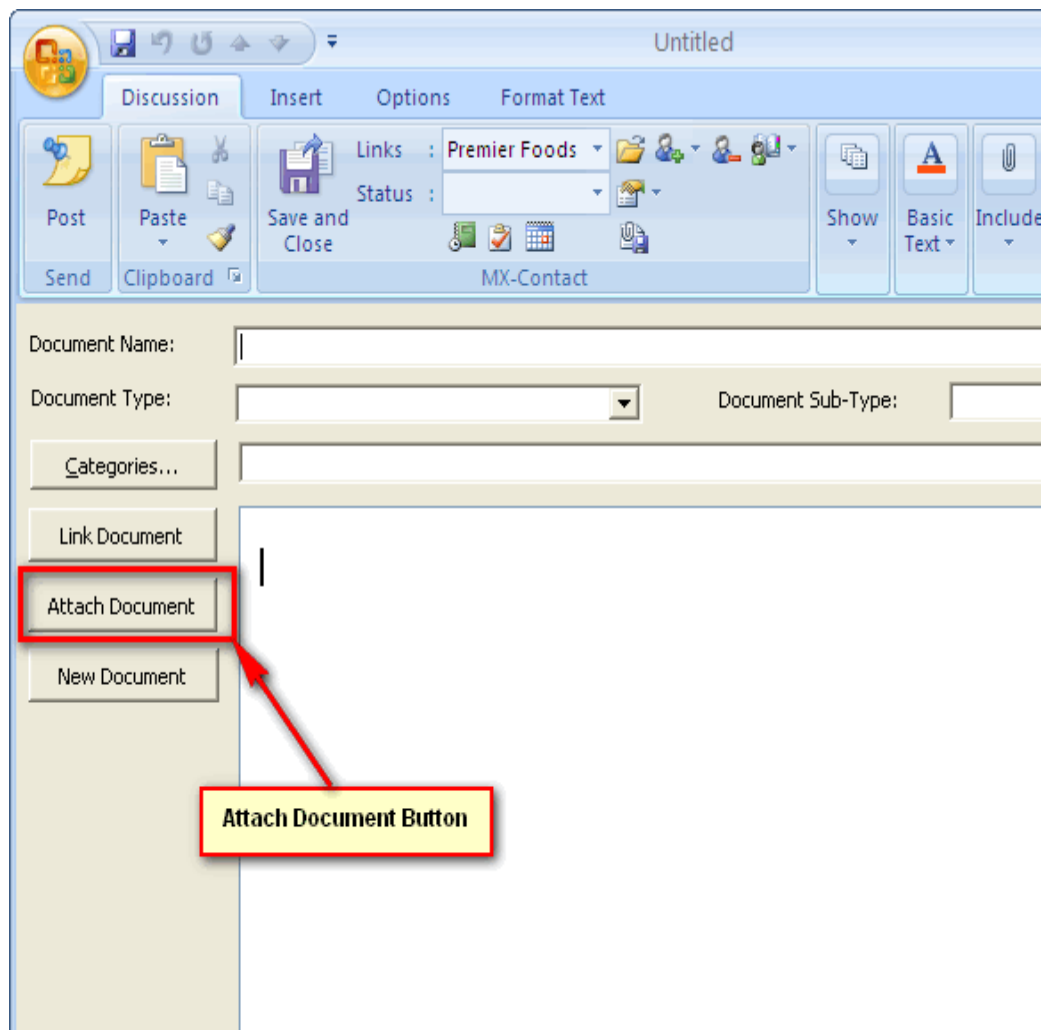
3. Click on the **Documents** Tab.



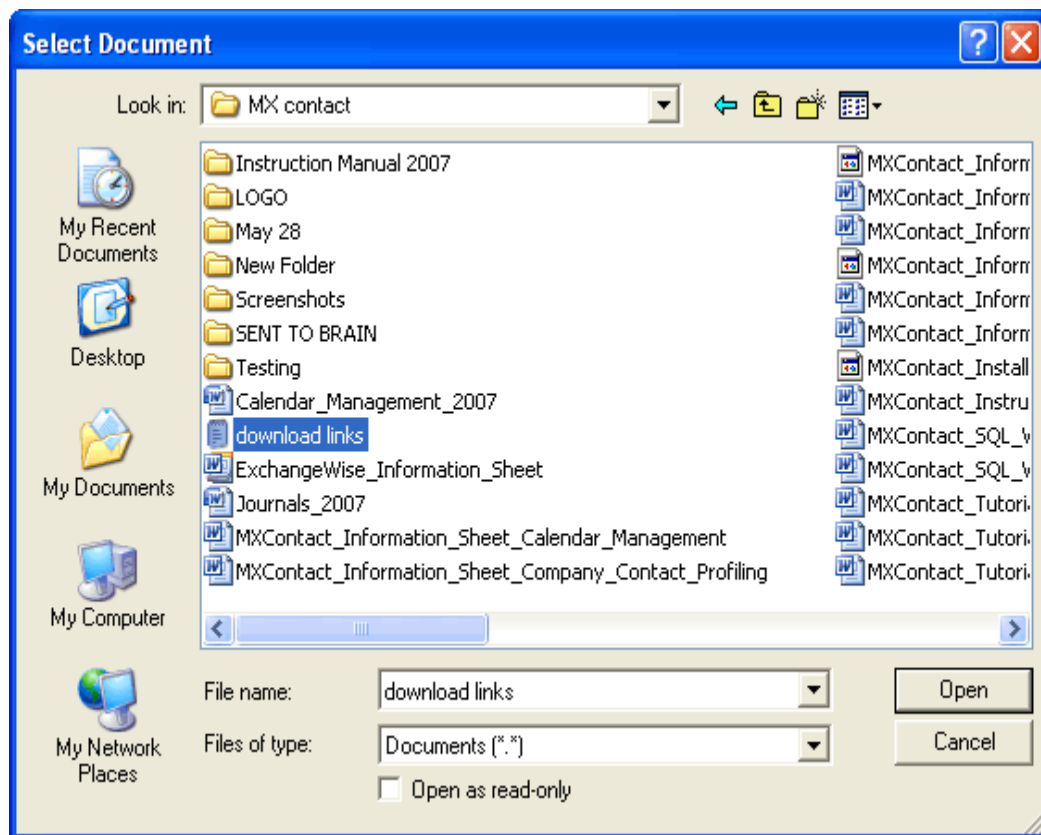
4. Click on the **New (Document) button**:



5. Click on the **Attach Document** button:



6. Select any document for tutorial purposes.



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

The screenshot displays the MX-Contact software interface. At the top, there is a ribbon with tabs for 'Contact', 'Insert', and 'Format Text'. Below the ribbon are several groups of icons: 'Actions' (Save & Close, Print), 'MX-Contact' (New Letter, New Document), 'General' (Details), 'Communicate' (E-mail, Meeting, Call), and 'Business Card'. The main area contains a form for project details:

Project:	Project NUM000001	Description:	
Primary Company:	Premier Foods	Type:	
Primary Contact:		Status:	
Primary User:		Stage:	
Primary Team:			
Lead Source:			
Date Opened:	6 /25/2011		

Below the form is a navigation bar with tabs for 'Notes', 'Companies', 'Contacts', 'Users', 'Teams', 'Tasks', 'Journals', 'Documents', and 'E-Mail'. The 'Documents' tab is active, showing a list of documents:

Document Name	Document Type
download links.txt	

A red arrow points from a yellow callout box to the document 'download links.txt'. The callout box contains the text: **Document is attached to 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

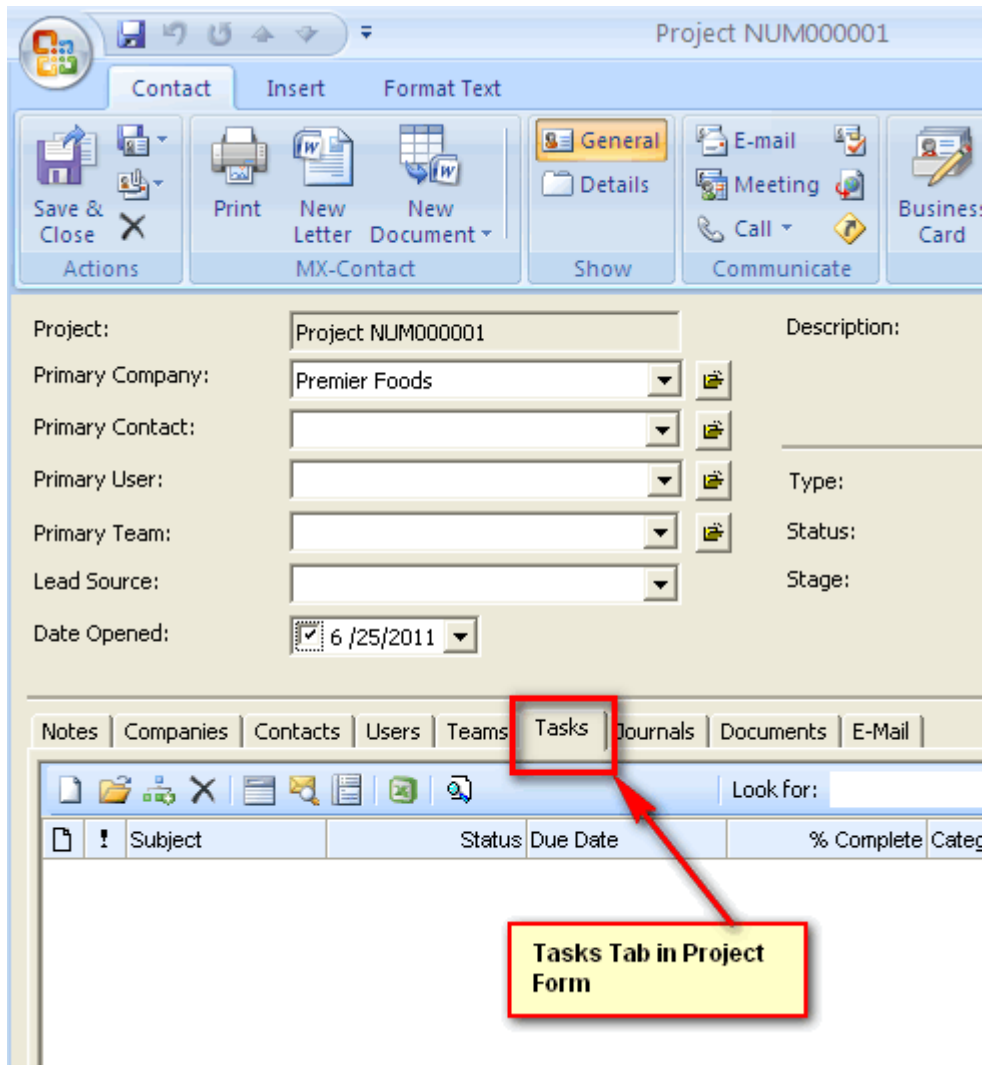
Create a Task from a Project to prepare a Project Costing Analysis for **Premier Foods**.

Complete the following information on the Task:

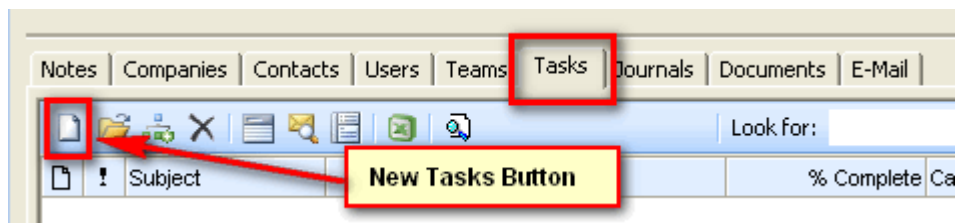
Project:	Project NUM000001
Subject:	Project Costing Analysis
Due Date:	2 weeks from Thursday
Category:	Sales - Prospect

Basic Steps:

1. Open the Project "**Project NUM000001**"
2. Once the Project form has opened, click on the **Tasks** Tab.



3. Click on **New (Task) Button**.



4. Enter the Task Details:

The screenshot shows the 'Project Costing Analysis - Task' form in Microsoft Exchange. The ribbon includes 'Task', 'Insert', and 'Format Text' tabs. The 'Task' ribbon has three groups: 'Actions' with 'Save & Close' and 'Delete' buttons; 'MX-Contact' with 'Links' (Premier Foods), 'Status', and 'Show' buttons; and 'Manage Task' with 'Assign Task', 'Send Status Report', and 'Mark Complete' buttons. The form fields are: 'Subject: Project Costing Analysis'; 'Start date: None'; 'Due date: Sat 7/9/2011'; 'Status: Not Started'; 'Priority: Normal'; '% Complete: 0%'; 'Reminder: None'; and 'Owner: Senthil Kumar'. A 'Due in 14 days.' notification is at the top.

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

The screenshot shows a software interface for a project form. The title bar indicates the project is 'Project NUM000001'. The interface includes a ribbon with tabs for 'Contact', 'Insert', and 'Format Text'. Below the ribbon are several groups of icons for actions, MX-Contact, Show, Communicate, and Options. The main form area contains fields for Project, Primary Company, Primary Contact, Primary User, Primary Team, Lead Source, Date Opened, Description, Type, Status, and Stage. A table at the bottom of the form is highlighted with a red border. The table has columns for Subject, Status, Due Date, % Complete, and Categories. One row is selected, showing 'Project Costing A...' as the subject, '7/9/2011 12:00:0...' as the due date, and '%' as the completion percentage. A yellow callout box with a red border and an arrow pointing to the selected row contains the text 'Task Record is added into Project Form'.

Subject	Status	Due Date	% Complete	Categories
Project Costing A...		7/9/2011 12:00:0...	%	

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](#))

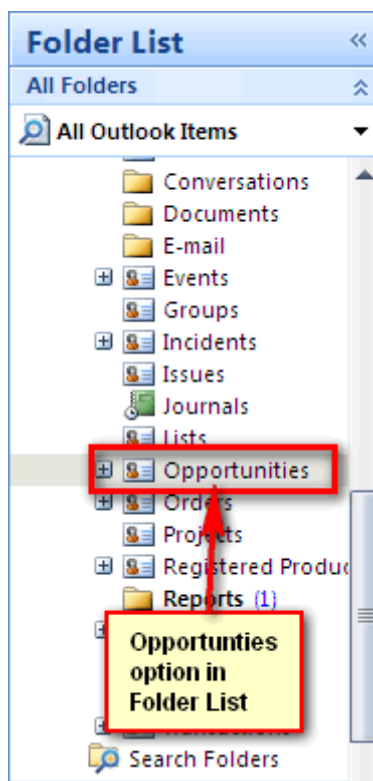
6.2 Adding an Opportunity Sales Plan: Solution

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

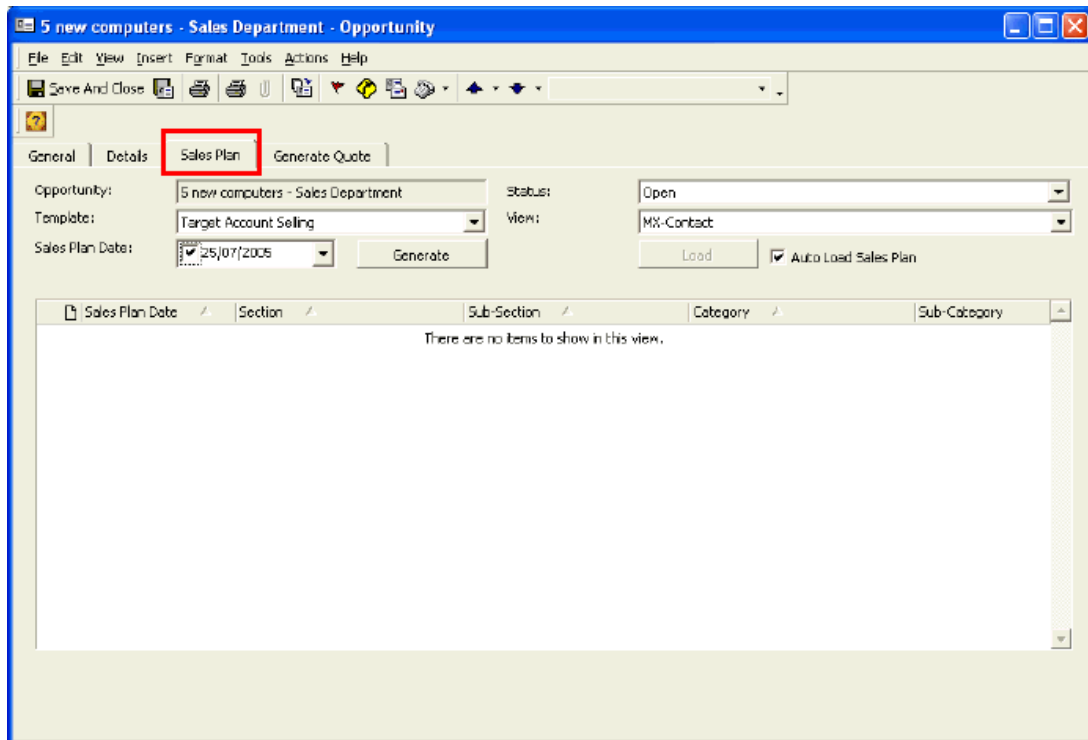
Opportunity:	Opportunity 1000001
Company:	Premier Foods
Template:	Target Account Selling
Sales Plan Date:	25/07/2005
Status:	Open

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](#))

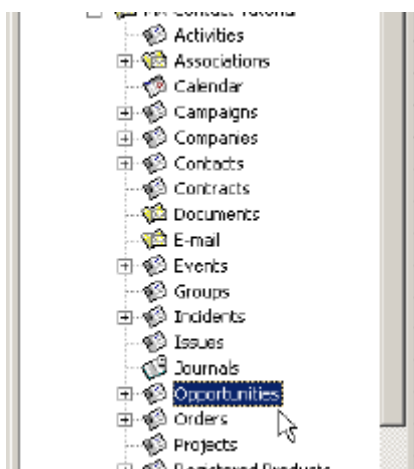
6.4 Working with an Opportunity Sales Plan: Solution

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

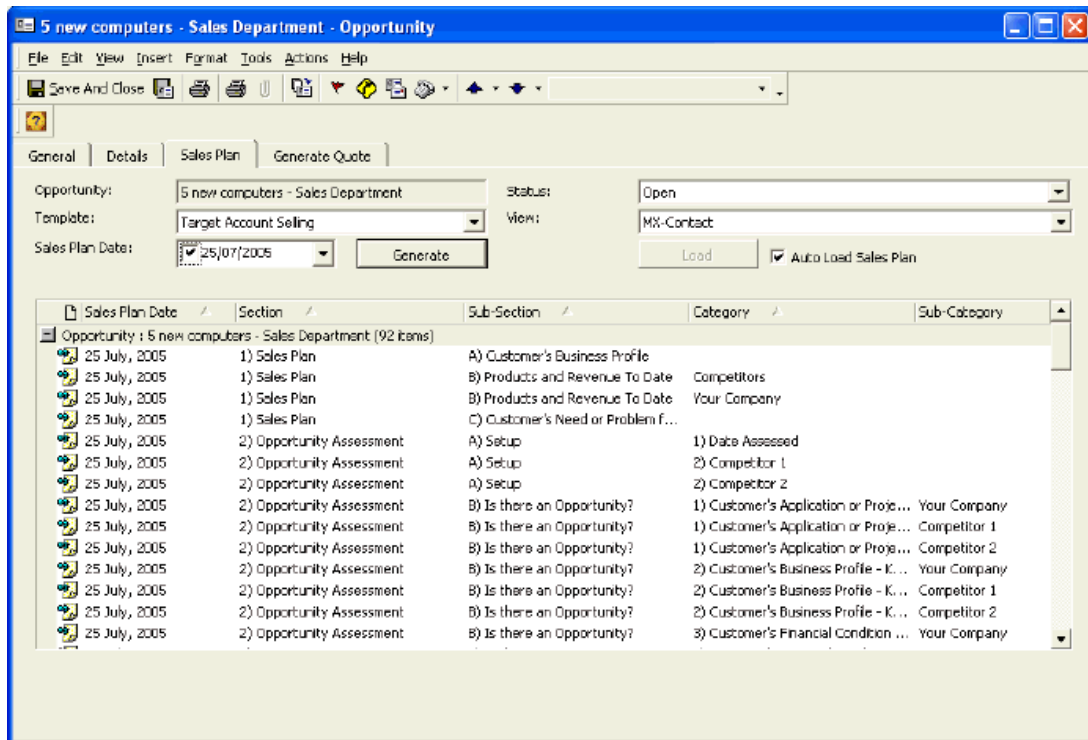
Opportunity:	Opportunity 1000001
Company:	Premier Foods
Sales Plan Date:	25/07/2005

Basic Steps:

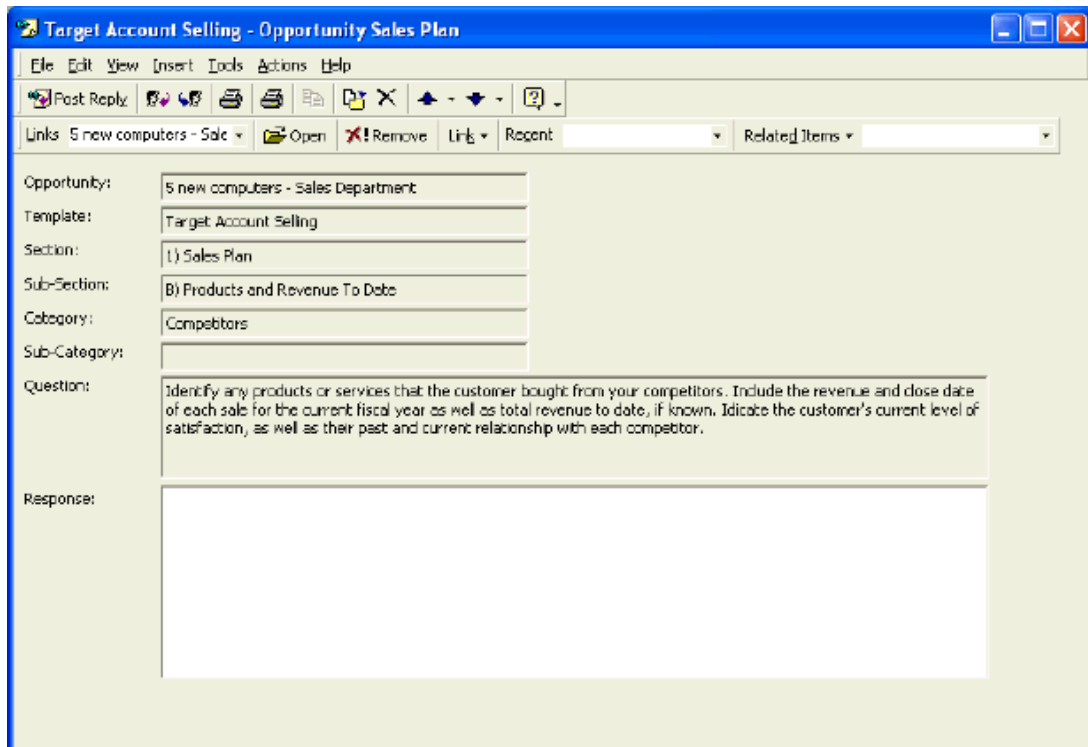
1. Select the **Opportunities** folder from the **Outlook Folder List**:



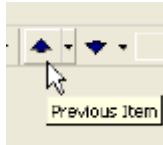
2. Select the **Opportunity** that has the sales plan that you wish to work with.
3. Click on the **Sales Plan tab**. The following screen will appear.



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).

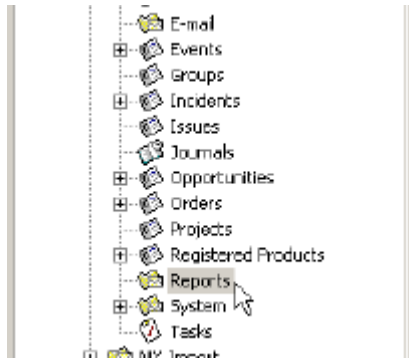
Show me the **Solution** ([Running a Sales Plan Report: Solution](#))

6.6 Running a Sales Plan Report: Solution

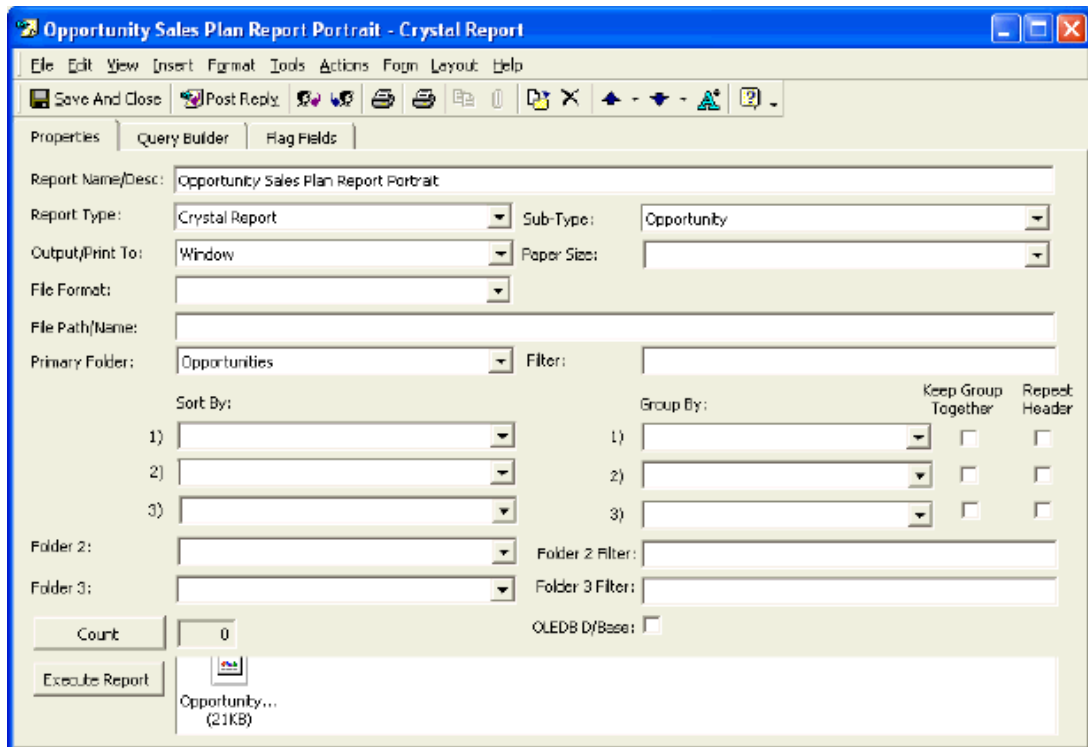
Run an Opportunity Sales Plan Report (Portrait).

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	Expected Close:	
Primary Contact:	Stage:	Probability: 75%	
Primary Product:	Date Opened: 02/12/2004	Potential: 20,000.00	
Target Account Selling : 25/07/2004			
1) Sales Plan			
A) CUSTOMER'S BUSINESS PROFILE			
B) Product and Revenue To Date - Competitor			
B) Product and Revenue 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](#))